

How to add repeat appointments (day wise)?



To add repeating visits in **HDSalon**, follow the steps below.

1. Run **HDSalon**. Right-click a time slot in appointment calendar and click **New Visit**.

The screenshot shows the HDSalon software interface. The main window displays a calendar for June 2016. A context menu is open over the 10:00 AM slot on Tuesday, 07/06/2016, with options for 'New Visit' and 'New Simple Appointment'. The left sidebar shows 'Today's Appointments' with entries for Ayush and Anshi. Below the calendar, there is an 'Employees' list with checkboxes for various staff members.

2. In the **Appointment Details** window that got opened, enter the required details.

The screenshot shows the 'Appointment Details' window. It contains fields for Customer (Ayush), Employee (Amit Tiwari), Service (Anti Dandruff treatment), Start Date (07/06/2016), End Date (07/06/2016), and Duration (1 hrs 0 mins). There are also sections for 'User Field List' with dropdowns for 'COMBS AND BRUSHES' (Square Brush) and 'HAIR STYLING TOOLS' (Hot Rollers). A 'Notes' field contains the text 'New customer - repeating appointment weekly.' and buttons for 'Add User Fields', 'Pick Message', 'OK (F8)', and 'Cancel'.





- **Customer:** Enter the customer name for the visit.
- **Employee:** Enter the employee name that you want to assign to the visit.
- **Service:** Select the service to assign to visit.
- **Start Date:** By default, this will be set to time slot you chosen to add visit. If start date of visit needs to be changed, you can edit it.
- **Duration:** By default, this will be set to the duration that was specified during item creation. If the duration of visit needs to be changed, you can edit it
- **End Date:** End date will be automatically adjusted based on duration specified. If end date of visit needs to be changed, you can edit it.

3. Click on **'OK'** button.

4. Next you will be brought to the **Add Visit** screen. Here click on **Save Repeating Visit (F5)** to add repeating visits.

Date	Emplo Name	Start Time	Service	Durati (min.)	Price	Package Name	Package Number
07/06/2016	Amit ...	01:00 PM	Anti Dandruff treatment	60	Rs.1,149.00		

5. In the **Repeating Visit Details** window that got opened, enter the required details.





Repeating Set Number : HYP-05

Generate Dates Check Conflict

Start Date	Week Day	Month
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Allow Conflicting Appointment Create (FB)

Close

- **Repeating Set Number:** Enter a number for this set of Visits. This number will be useful while editing or deleting a visit.
- **Generate Dates:** Clicking on this button will open 'Dates Generator' screen as shown below that allow you to select all the dates for the appointment.

From : 08/06/2016 To : 09/06/2016

Select Dates

Repeat every : 1 days

Daily
 Weekly
 Monthly

Generate

- From:** Select the start date for the set of visits.
- To:** Select the end date for the set of visits.
- Select Dates:** This defines the periodicity of your repeating visits. Select **Daily** to have daily repeating visits





- iv. **Repeat every:** enter how often the appointments must be booked in terms of the repeat periods.

For example, if you want to book a visit that repeats **every two days**, do the following:

- Select **From** and **To** dates.
- Select **Daily** from the **select dates**.
- Enter **2** in the **Repeat Every** field.

Dates Generator

From : 08/06/2016 To : 08/07/2016

Select Dates

Repeat every : 2 days

Daily
 Weekly
 Monthly

Generate

- 6. Click on **'Generate'** button. You can see the **'Repeating Visit details'** screen as shown below with generated dates for set of appointment.

Repeating Visit Details

Repeating Set Number : HYP-05

12 dates generated

Generate Dates Check Conflict

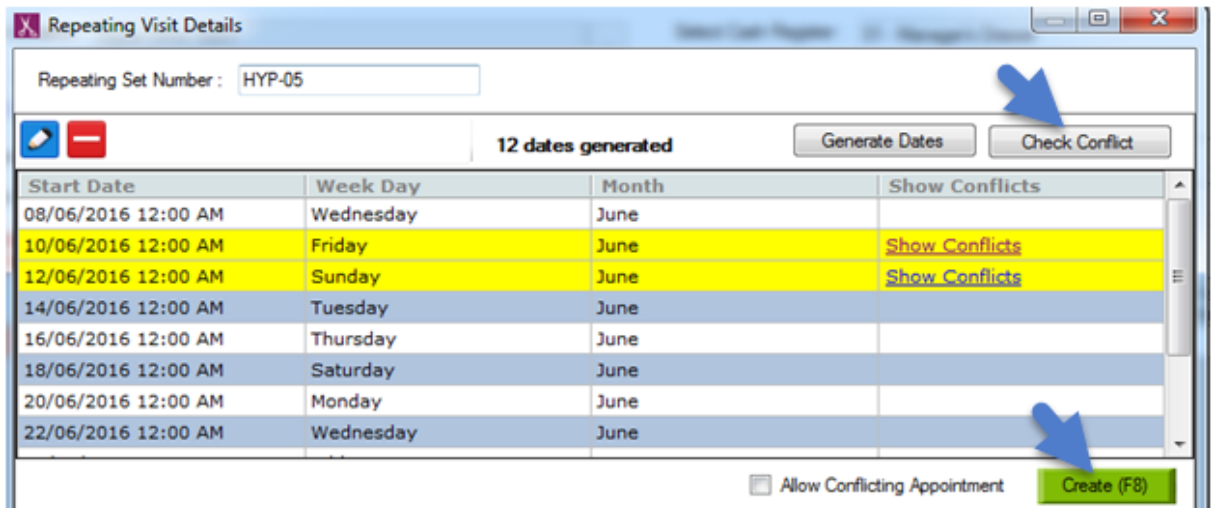
Start Date	Week Day	Month
08/06/2016 12:00 AM	Wednesday	June
10/06/2016 12:00 AM	Friday	June
12/06/2016 12:00 AM	Sunday	June
14/06/2016 12:00 AM	Tuesday	June
16/06/2016 12:00 AM	Thursday	June
18/06/2016 12:00 AM	Saturday	June
20/06/2016 12:00 AM	Monday	June
22/06/2016 12:00 AM	Wednesday	June



Allow Conflicting Appointment Create (F8)

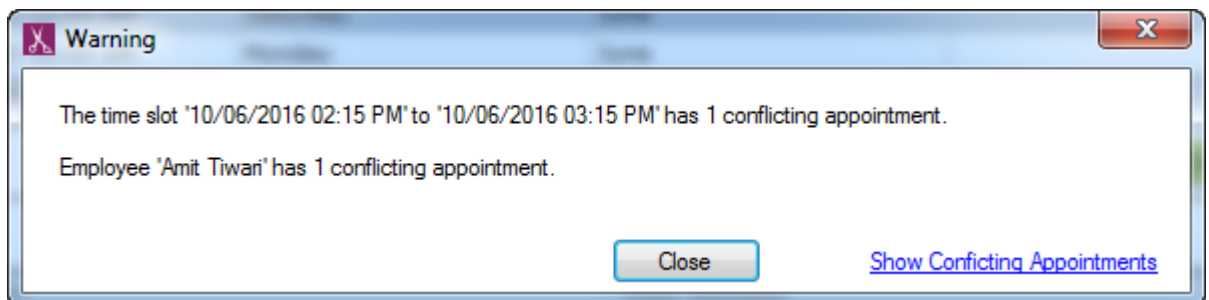




7. Click on '**Check conflict**' button to check conflicts with any future appointments. If there are any conflicting appointments for the appointments that are being created, then such appointments are displayed in yellow color.



- '**Edit Date**'  allows you to only change the date of the conflict appointment.
 - '**Delete Date**'  allows you to delete the conflicting appointment.
8. Click on Show Conflicts link to see the conflicting appointments for each of the dates generated.
 9. A warning message is shown informing about the conflicting appointments



10. Click on **Close** to close the warning message. OR click on **Show Conflicting Appointments** link to check the appointments that are conflicting with the generated dates.
11. You can edit or delete conflicting appointments if required.

Note: You can click on **Allow conflicting appointment** to save all appointments with conflict.

12. Once all the conflicts are either ignored or resolved, click on '**Create**' to create the appointments.





Repeating Visit Details

Repeating Set Number : HYP-05

12 dates generated

Generate Dates Check Conflict

Start Date	Week Day	Month	Show Conflicts
08/06/2016 12:00 AM	Wednesday	June	
10/06/2016 12:00 AM	Friday	June	Show Conflicts
12/06/2016 12:00 AM	Sunday	June	Show Conflicts
14/06/2016 12:00 AM	Tuesday	June	
16/06/2016 12:00 AM	Thursday	June	
18/06/2016 12:00 AM	Saturday	June	
20/06/2016 12:00 AM	Monday	June	
22/06/2016 12:00 AM	Wednesday	June	

Allow Conflicting Appointment Create (F8)

Start Date	Visit Number	Show Conflicts
08/06/2016 12:00 AM	HDS-VI00026	
10/06/2016 12:00 AM	HDS-VI00027	
12/06/2016 12:00 AM	HDS-VI00028	Show Conflicts
14/06/2016 12:00 AM	HDS-VI00029	
16/06/2016 12:00 AM	HDS-VI00030	
18/06/2016 12:00 AM	HDS-VI00031	
20/06/2016 12:00 AM	HDS-VI00032	
22/06/2016 12:00 AM	HDS-VI00033	
24/06/2016 12:00 AM	HDS-VI00034	
26/06/2016 12:00 AM	HDS-VI00035	

Close

13. Click on **Close** to go back to appointment calendar window.

