

How to add repeat appointments (month wise)?



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

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

The screenshot displays the HDSalon software interface. At the top, it shows 'Business Location : Hyper Drive Salon', 'Cash Register : 01 - Manager's Drawer', and 'Login : HDAdmin'. The main area features a calendar for June 2016. On the left, 'Today's Appointments' lists: Ayush (Anti Dandruff treatment) at 10:00 AM and Anshi (Anti hair fall treatment) at 11:30 AM. Below the calendar is an 'Employees' list including Amit Tiwari, Anshul Dubey, Ashish Soni, Himanshu Mishra, Manish Porwal, Manoj R, and Richa K. The central calendar grid shows appointments for Tuesday, 07 Jun, including Ayush's treatment at 10:00 AM and Anshi's treatment at 11:30 AM. A context menu is open over the 01:00 PM slot on 07/06/2016, with options for 'New Visit' and 'New Simple Appointment'.

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

- **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 click on it and 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 click on it and 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 click on it and edit it.





Appointment Details

Customer : Ayush Start Date : 08/06/2016 02:15 PM
Employee : Amit Tiwari Duration : 0 hrs 45 mins
Service : Anti hair fall treatment End Date : 08/06/2016 03:00 PM
Sold Package : Clear Selection

User Field List
COMBS AND BRUSHES : Round Brush GROOMING EQUIPMENT :
HAIR STYLING TOOLS : Hot Rollers

Notes :
New customer - motly appointment for three months

Add User Fields OK (F8) Cancel

3. Click on 'OK' button.
4. Next you will be brought to the 'Add Visit' screen. Here click on **Save Repeating Visit** to add repeating visits.

Add Visit Details

Select Business Location : Hyper Drive Salon Select Cash Register : 01 - Manager's Drawer
Number : HDS-VI00031 Creation Date : 07/06/2016
Customer : Ayush
Customer Email : aysus123@gmail.com Send email to Customer Referral :
Customer Mobile Number : 7777777777 Send sms to Customer Created By :

Date	Employ 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		

Products Used Up **Additional Purchases**

Barcode : SearchCode : Name : Barcode : SearchCode : Name :

Item Name	Barcode	Quantity	Total Amount
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Item Name	Barcode	Quantity	Price	Total Amount
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Notes : Pick Message

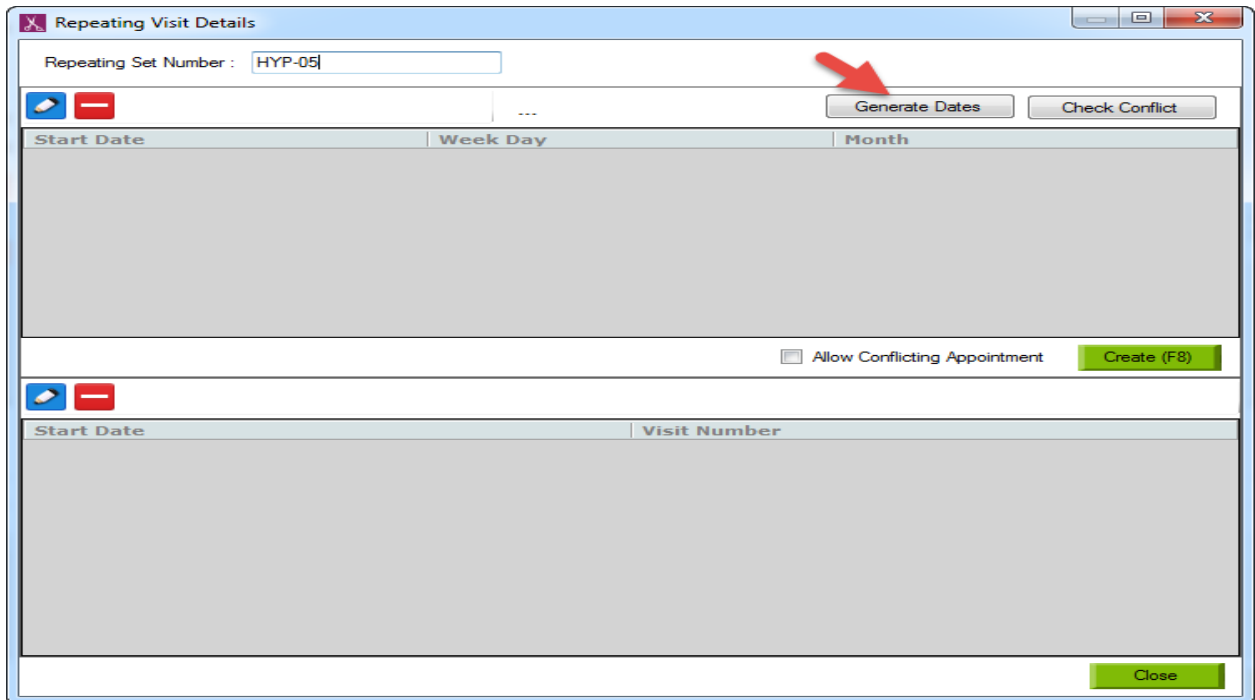
Total : Rs. 1,149.00

Save Repeating Visit (F5) Save & Print (F7) Save (F8) Cancel

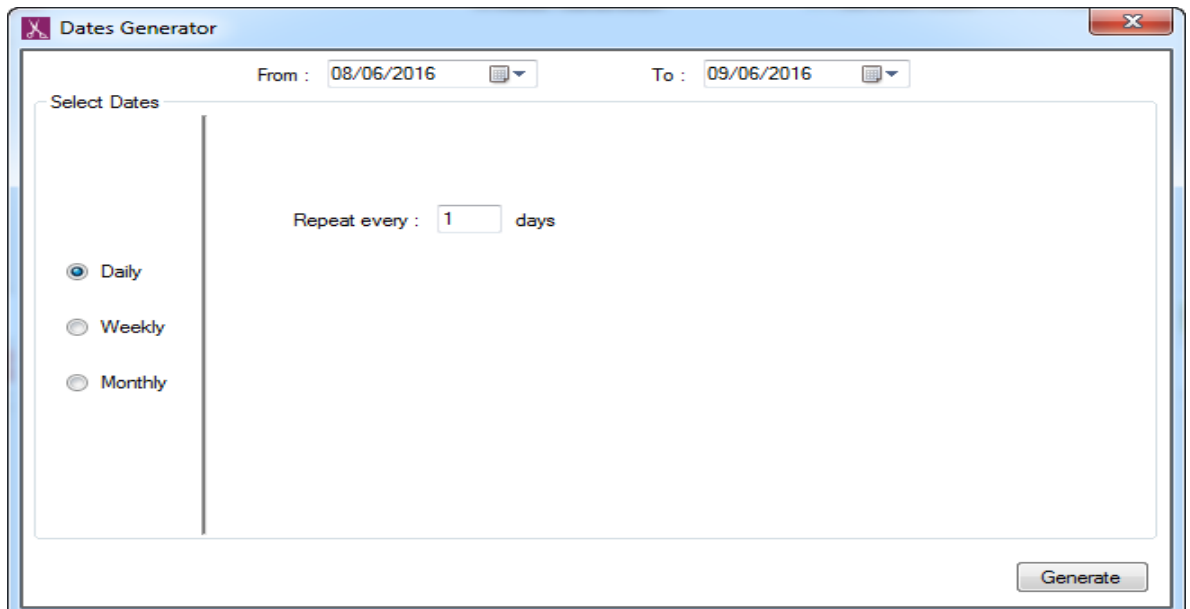




5. In the **Repeating Visit Details** window that got opened, enter the required details.



- **Repeating Set Number:** Enter a number for this set of appointments. This number will be useful while editing or deleting an appointment.
- **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.





- i. **From:** Select the start date for the set of appointments.
- ii. **To:** Select the end date for the set of appointments.
- iii. **Select Dates:** select a periodicity for the appointments as Monthly.
- iv. Select the months for which you want the appointment to be repeated by checking the respective checkboxes. You can either select
 - **Dates of a month**
 - **Week Days to repeat the appointment.**

Dates of a month:

For example, if you want to book an appointment that repeats **8th and 15th** of a selected **month(s)**, do the following:

- a. Select **From** and **To** date.
- b. Select **Monthly** from the **select dates**.
- c. Select required calendar **date(s)**

The screenshot shows the 'Dates Generator' application window. At the top, it displays the 'From' date as 08/06/2016 and the 'To' date as 30/08/2016. Below this, there is a 'Select Dates' section. On the left, there are radio buttons for 'Daily', 'Weekly', and 'Monthly', with 'Monthly' selected and circled in green. To the right of these are checkboxes for the months of the year: January, February, March, April, May, June, July, August, September, October, November, and December. The checkboxes for June, July, and August are checked. Below the month list is a 'Select All' checkbox. In the center, there are two radio buttons: 'On Date(s)' (selected and circled in green) and 'On Week Days'. To the right of 'On Date(s)' is a calendar grid showing dates from 1 to 31. The 8th and 15th are checked. Below the calendar grid are checkboxes for 'First', 'Second', 'Third', 'Fourth', 'Fifth', and 'Last'. To the right of these are checkboxes for the days of the week: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday. Below these are 'Select All' and 'Select All days' checkboxes. At the bottom right, there is a 'Generate' button, which is highlighted with a green arrow.





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



The screenshot shows a window titled "Repeating Visit Details" with a text field for "Repeating Set Number" containing "mon-01". Below the field are two icons: a pencil and a red minus sign. To the right, it says "6 dates generated" and has two buttons: "Generate Dates" and "Check Conflict". A table displays the following data:

Start Date	Week Day	Month	Show Conflicts
08/06/2016 12:00 AM	Wednesday	June	
15/06/2016 12:00 AM	Wednesday	June	
08/07/2016 12:00 AM	Friday	July	
15/07/2016 12:00 AM	Friday	July	
08/08/2016 12:00 AM	Monday	August	
15/08/2016 12:00 AM	Monday	August	

- e. 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.

The screenshot shows the same "Repeating Visit Details" window. A red arrow points to the "Check Conflict" button. The table now shows the date "15/07/2016 12:00 AM" highlighted in yellow, and the "Show Conflicts" column for that row contains a blue link labeled "Show Conflicts".

Start Date	Week Day	Month	Show Conflicts
08/06/2016 12:00 AM	Wednesday	June	
15/06/2016 12:00 AM	Wednesday	June	
08/07/2016 12:00 AM	Friday	July	
15/07/2016 12:00 AM	Friday	July	Show Conflicts
08/08/2016 12:00 AM	Monday	August	
15/08/2016 12:00 AM	Monday	August	

- **Edit Date**  allows you to only change the date of the selected appointment.
 - **Delete Date**  allows you to delete selected appointment.
- f. Click on Show Conflicts link to see the conflicting appointments for each of the dates generated.





- g. You can view, edit or delete the conflicting appointments as necessary, by clicking on the **Show Conflicting appointments** link.

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

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

Repeating Visit Details

Repeating Set Number : mon-01

6 dates generated

Generate Dates Check Conflict

Start Date	Week Day	Month	Show Conflicts
08/06/2016 12:00 AM	Wednesday	June	
15/06/2016 12:00 AM	Wednesday	June	
08/07/2016 12:00 AM	Friday	July	
15/07/2016 12:00 AM	Friday	July	Show Conflicts
08/08/2016 12:00 AM	Monday	August	
15/08/2016 12:00 AM	Monday	August	

Allow Conflicting Appointment Create (F8)

Start Date	Visit Number	Show Conflicts
08/06/2016 12:00 AM	HDS-VI00040	
15/06/2016 12:00 AM	HDS-VI00041	
08/07/2016 12:00 AM	HDS-VI00042	
15/07/2016 12:00 AM	HDS-VI00043	Show Conflicts
08/08/2016 12:00 AM	HDS-VI00044	
15/08/2016 12:00 AM	HDS-VI00045	

Close

Week Days:

For example, if you want to book an appointment that repeats on **second Tuesday(s)** of selected **month(s)**, do the following:

- Select **From** and **To** date.
- Select **Monthly** from the **select dates**.
- Select **'On Week Days'** radio button.
- Select required week(s) and day(s) of a month.





From : 08/06/2016 To : 30/08/2016

Select Dates

Daily
 Weekly
 Monthly

January
 February
 March
 April
 May
 June
 July
 August
 September
 October
 November
 December
 Select All

On Date(s)
 On Week Days

1 8 15 22 29
 2 9 16 23 30
 3 10 17 24 31
 4 11 18 25 Last
 5 12 19 26
 6 13 20 27
 7 14 21 28

First
 Second
 Third
 Fourth
 Fifth
 Last
 Select All

Sunday
 Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday
 Select All days

Generate

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

Repeating Set Number : mon-01

3 dates generated



Generate Dates Check Conflict

Start Date	Week Day	Month
14/06/2016 12:00 AM	Tuesday	June
12/07/2016 12:00 AM	Tuesday	July
09/08/2016 12:00 AM	Tuesday	August

- f. 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 selected appointment.
 - **Delete Date**  allows you to delete selected appointment.
- g. Click on Show Conflicts link to see the conflicting appointments for each of the dates generated.
- h. You can view, edit or delete the conflicting appointments as necessary, by clicking on the **Show Conflicting appointments** link.
- i. Once all the conflicts are either ignored or resolved, click on 'Create' to create the appointments.

Repeating Visit Details

Repeating Set Number : mon-01

  3 dates generated

Start Date	Week Day	Month
14/06/2016 12:00 AM	Tuesday	June
12/07/2016 12:00 AM	Tuesday	July
09/08/2016 12:00 AM	Tuesday	August

Allow Conflicting Appointment

Start Date	Visit Number	Show Conflicts
14/06/2016 12:00 AM	HDS-VI00040	
12/07/2016 12:00 AM	HDS-VI00041	
09/08/2016 12:00 AM	HDS-VI00042	

- j. In **Repeating Visit Details** click on **Close** to go back to appointment calendar window.

