

How to add repeat appointments (week 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 (10:00 AM, Anti Dandruff treatment) and Anshi (11:30 AM, Anti hair fall treatment). The calendar grid shows appointments for Tuesday, 07 Jun, at 10:00 AM (Ayush) and 11:30 AM (Anshi), and for Wednesday, 08 Jun, at 10:00 AM (Abhinav S) and 12:30 PM (Anshi). A context menu is open over the 10:00 AM slot on Tuesday, offering 'New Visit' and 'New Simple Appointment' options.

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 opted by customer.
- **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 : 07/06/2016 01:00 PM
Employee : Amit Tiwari Duration : 1 hrs 0 mins
Service : Anti Dandruff treatment End Date : 07/06/2016 02:00 PM
Sold Package : Clear Selection

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

Notes :
New customer - repeating appointment weekly. Pick Message

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	Duration (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

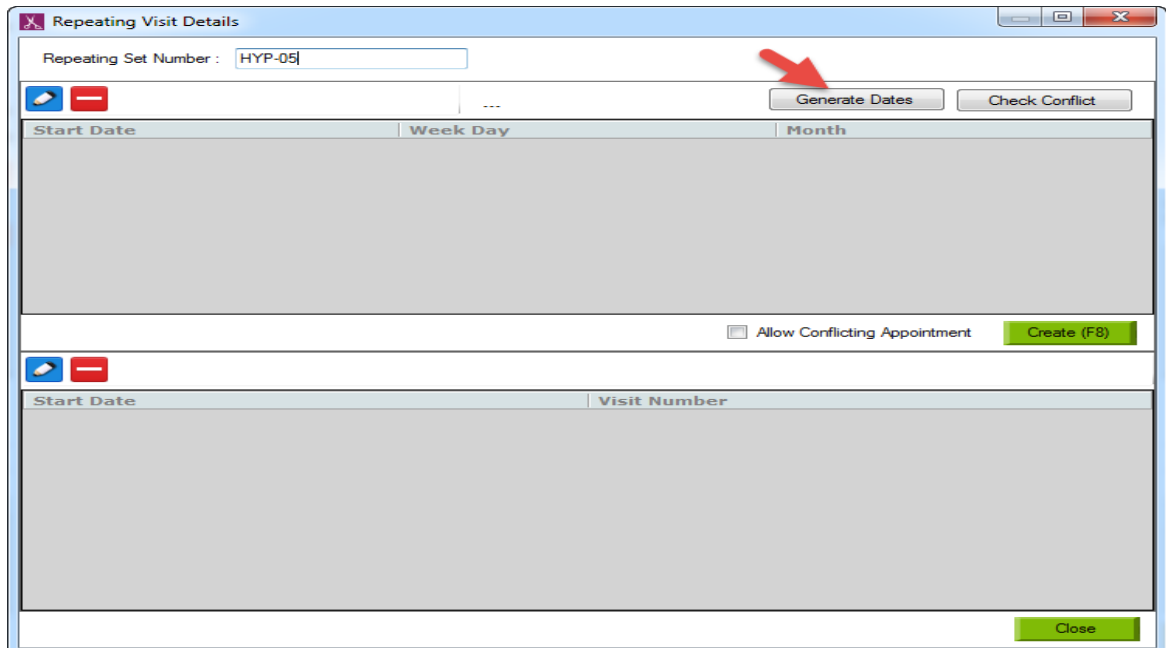
Total : Rs. 1,149.00

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

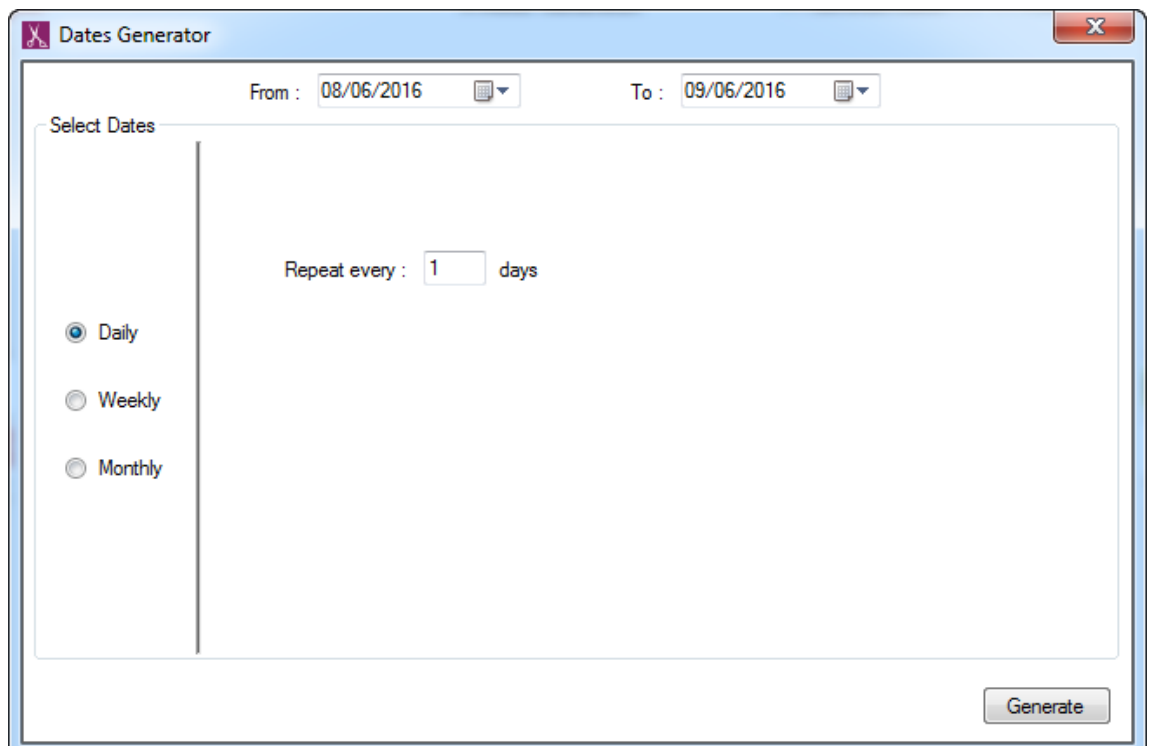




5. In the **Repeating Visit Details** window that got opened, enter the required details.



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

For example, if you want to book an appointment that repeats **every two weeks on selected day**, do the following:

- Select **From** and **To** date.
- Select **Weekly** from the **select dates**.
- Enter **2** in **Repeat Every** field.
- Select the day of the week.

Dates Generator

From : 08/06/2016 To : 30/07/2016

Select Dates

Repeat every : 2 weeks

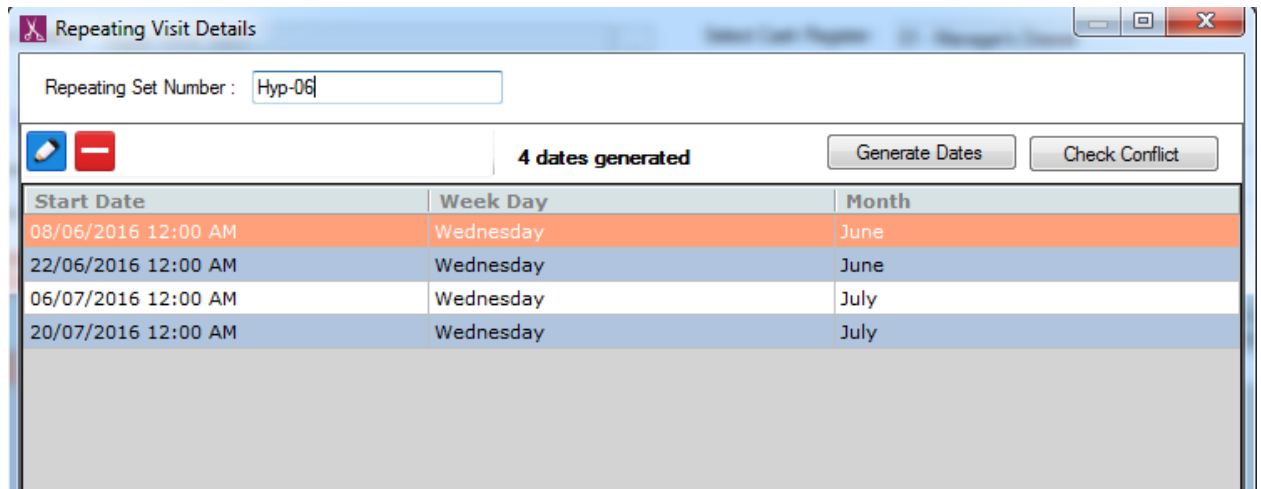
Daily Weekly Monthly

Sunday Monday Tuesday Wednesday Thursday Friday Saturday

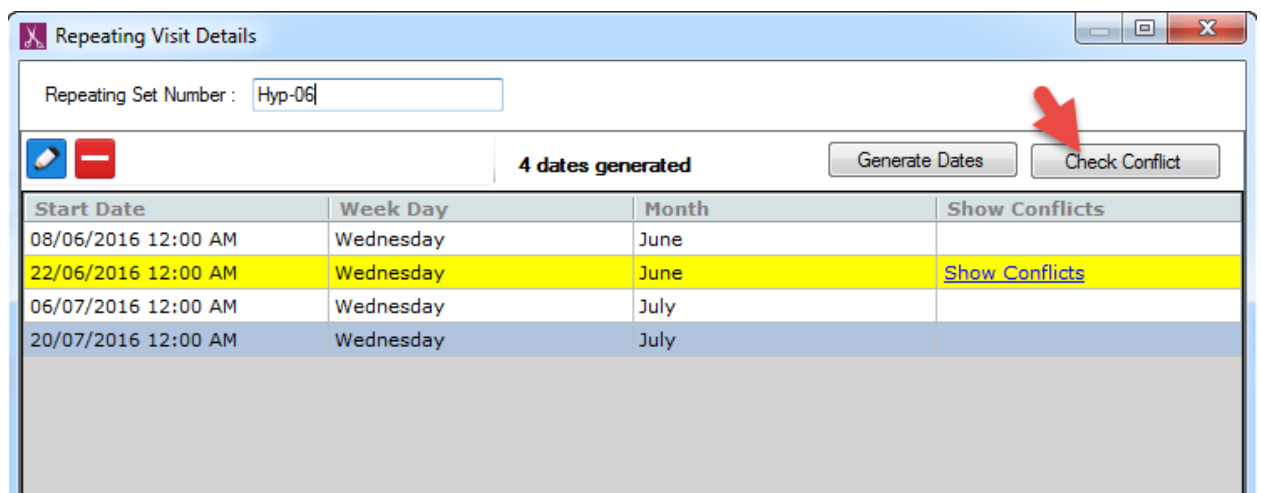
Generate



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





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 selected appointment.
- **Delete Date**  allows you to delete selected appointment.

8. Click on Show Conflicts link to see the conflicting appointments for each of the dates generated.
9. You can view, edit or delete the conflicting appointments as necessary, clicking on the **Show Conflicting appointments** link.

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





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

Repeating Visit Details

Repeating Set Number :

4 dates generated

Generate Dates Check Conflict

Start Date	Week Day	Month	Show Conflicts
08/06/2016 12:00 AM	Wednesday	June	
22/06/2016 12:00 AM	Wednesday	June	Show Conflicts
06/07/2016 12:00 AM	Wednesday	July	
20/07/2016 12:00 AM	Wednesday	July	

Allow Conflicting Appointment

Create (F8)

Start Date	Visit Number	Show Conflicts
08/06/2016 12:00 AM	HDS-VI00046	
22/06/2016 12:00 AM	HDS-VI00047	Show Conflicts
06/07/2016 12:00 AM	HDS-VI00048	
20/07/2016 12:00 AM	HDS-VI00049	

Close

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

