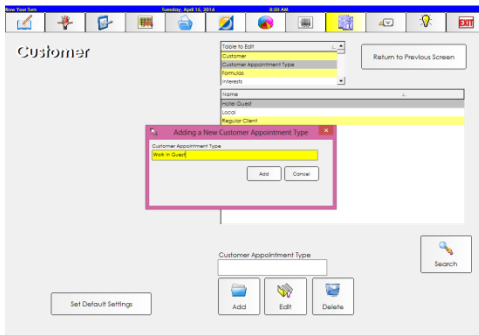


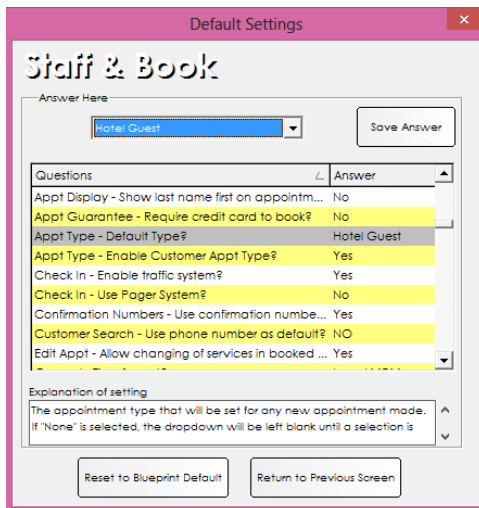
# Appointment Types

Use this guide to set up and utilize the Customer Appointment Type feature in SpaBiz® 5.0.



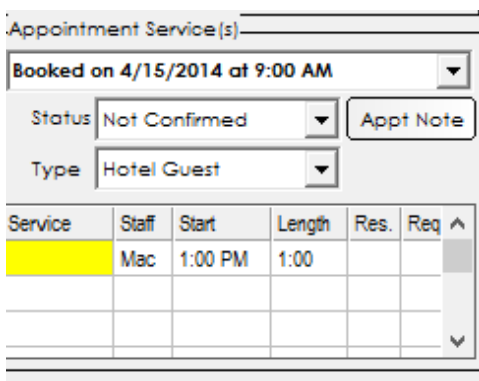
## Adding Appointment Types

1. From the SalonBiz®/SpaBiz® menu bar, click on the Blueprint icon.
2. Click the Customer button.
3. Select the Customer Appointment Type table from the list of Tables to Edit.
4. Click the Add button.
5. Type in the desired name for the Customer Appointment Type, and click Add.
6. Complete this process for all desired types you wish to add.



## Enabling Customer Appointment Type in Appointments

1. From the SalonBiz®/SpaBiz® menu bar, click on Blueprint icon.
2. Click the Staff & Book button.
3. Click the Set Default Settings button.
4. “Appt Type – Default Type?” will determine which type is automatically set by default in each new appointment that is made.
5. “Appt Type – Enable Customer Appt Type?” will need to be set to Yes in order for users to view and select appointment types in appointments.
  - The Appointment Type dropdown will be located below the Confirmation Status in the appointment.



## Setting Appointment Types in an Appointment

1. Each time a new appointment is made, the default type will be set automatically.
2. The user can select a different type from the dropdown, if needed.
  - The type can be edited after the appointment has been checked in or out, as well.
3. Appointments that were made before Appointment Types were enabled will not have one selected by default.

Beautiful You 4/15/2014 9:37:52AM

**Appointment Types for 4/15/2014 to 4/15/2014**

**Beautiful You**

Staff	Qty	Gross	Discount	Net
<b>Hotel Guest</b>				
Jane Doe	1	\$40.00	\$0.00	\$40.00
Mae Ashford-Smith	1	\$55.00	\$0.00	\$55.00
<b>Totals</b>	<b>2</b>	<b>\$95.00</b>	<b>\$0.00</b>	<b>\$95.00</b>
<b>Regular Client</b>				
Staff	Qty	Gross	Discount	Net
Jane Doe	1	\$25.00	\$0.00	\$25.00
<b>Totals</b>	<b>1</b>	<b>\$25.00</b>	<b>\$0.00</b>	<b>\$25.00</b>
<b>Local</b>				
Staff	Qty	Gross	Discount	Net
Jane Doe	1	\$25.00	\$0.00	\$25.00
<b>Totals</b>	<b>1</b>	<b>\$25.00</b>	<b>\$0.00</b>	<b>\$25.00</b>
<b>Store Totals</b>	<b>4</b>	<b>\$145.00</b>	<b>\$0.00</b>	<b>\$145.00</b>
<b>Grand Totals</b>	<b>4</b>	<b>\$145.00</b>	<b>\$0.00</b>	<b>\$145.00</b>

## Viewing the Appointment Type Report

1. From the SalonBiz®/SpaBiz® menu bar, click on Reports icon.
2. Expand the Management category.
3. Either double-click the Appointment Type report, or single click and click the Run Report button.
4. Input your desired date range, and click OK.
5. Select the appointment types you wish to view from the list, and click OK.
6. The report is grouped by Appointment Type and includes the following fields:
  - Staff
  - Qty
  - Gross
  - Discount
  - Net
  - Totals
  - Store Totals
  - Grand Totals