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# SHORTCUTS FUSION APPOINTMENT BOOK RESIZING AND MOVING APPOINTMENTS

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**SHORTCUTS**  
SMARTER BUSINESS TECHNOLOGY

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## ABOUT THIS DOCUMENT

The Shortcuts Appointment Book offers a range of tools which allow you to quickly and easily make adjustments to your appointments.

You can change the duration of an appointment by simply clicking and dragging to resize the appointment block. This is handy if a particular appointment happens to be longer or shorter than usual.

The intuitive drag and drop method is perfect for moving an appointment within the same day. For example, if an appointment is booked in at 10:00, but the client calls and asks if they can change it to 11:00, you could simply drag and drop the appointment into its new position to change the starting time.

Week view allows you see a particular team member's availability for the entire week, which is great for moving an appointment when the client has requested a specific employee.

The select and move feature is also available for when you need to move an appointment to a specific date.

Rather than creating a whole new appointment, you can save time by using these features to move and resize your existing appointments.

# RESIZING AN APPOINTMENT

- 1 Click on the **main** menu.
- 2 Click on the **appointments** icon.
- 3 Click and hold on the darker area of the appointment block you wish to resize.
- 4 Without releasing the mouse, drag the dark coloured area up or down to resize the appointment block.
- 5 Release the mouse when you are happy with the size.

The screenshot displays a scheduling interface for Friday, 26 Feb 2016. The main menu on the right includes options like Main, Appointments, Arrivals, Walkin Manager, Point Of Sale, Clients, Performance, and Exit. The central calendar grid shows appointments for staff members Anna, James, Lucy, Chris, and Katie. A specific appointment for 'Sandy Jones' (Rehydrating Facial) is highlighted with a red box and a blue circle containing the number '3', corresponding to the third step in the instructions.

# MOVING AN APPOINTMENT WITHIN THE SAME DAY

- 1 Click on the **main** menu.
- 2 Click on the **appointments** icon.
- 3 Click and hold on the lighter area of the appointment block you wish to move.
- 4 Without releasing the mouse, drag the appointment block into its new position.
- 5 Release the mouse when you are happy with the position.

Time	Anna	James	Lucy	Chris	Katie
9:00 AM					
9:15					
9:30	Thomas Smith 30 min Massage	Fiona Smith Ladies Style Cut		Allison Tenby Airbrush 0488 338 888	
9:45					
10:00 AM					
10:15					
10:30	Angela Jefferson Body Scrub	Oliver Jackson Mens Style Cut			
10:45					
11:00 AM					
11:15					
11:30					
11:45	Angela Jefferson 30 Min Massage	Veronica Darcy Ladies Style Cut		Matthew Darcy Mens Style Cut	
12:00 PM					
12:15					
12:30	Lunch	Viktor Reed		Raymond Landry 30 min Massage	
12:45					
1:00 PM					
1:15					
1:30					
1:45					
2:00 PM					
2:15					
2:30					
2:45					
3:00 PM					
3:15					
3:30					
3:45					
4:00 PM					
4:15					
4:30					
4:45					
5:00 PM					
5:15					
5:30					
5:45					

# MOVING AN APPOINTMENT USING WEEK VIEW

- 1 Click on the **main** menu.
- 2 Click on the **appointments** icon.
- 3 Right click on the appointment you wish to move.
- 4 Select **view week** to view the employee's schedule for the week.

The screenshot displays a weekly appointment schedule for Thursday, 3rd March 2016. The interface is divided into several sections:

- Top Bar:** Shows the date 'Thu, 3 Mar' and the time '9:21 AM'.
- Main Menu (Right):** Contains icons for 'Main', 'Appointments', 'Arrivals', 'Walkin Manager', 'Point Of Sale', 'Clients', 'Performance', and 'Exit'. The 'Appointments' icon is highlighted with a red circle and the number 2.
- Appointment Grid:** A grid showing appointments for employees: Anna, James, Lucy, Chris, and Katie. The grid is organized by time slots (9:00 AM to 5:00 PM) and includes various services like 'Full Leg Wax', 'Ladies Style Cut', 'Blowdry', and 'Massage'. Some appointments are marked as 'RDO' (Red Day Off).
- Context Menu:** A menu is open over an appointment for 'Yasmin Gr Ladies Style'. The menu items are: Arrived, Checkout, Confirmed, Needs Review, No Show, Change Service, Select, Tag, CPC, Notes, Recur, **View Week** (highlighted with a red circle and the number 4), Add to Group, Extra, and Delete.
- Bottom Bar:** Includes navigation buttons for 'Day', 'Today', 'Day >', and 'Week >', along with a 'Menu' button.

- A** In week view, you can navigate to different days using the quick navigation buttons at the bottom.
- B** The calendar in the top left corner can be used to select a specific date.
- C** You can choose to view either 1, 2 or 3 weeks at a time using the weeks drop-down menu.
- 5** Click on the **employee** icon if you'd like to view other employee's schedules. If not, go to step 8.
- 6** Click on the grey tiles to select the employees you want to view. You can select multiple employees.
- 7** Click **done**.
- 8** Click and hold on the lighter area of the appointment block you wish to move.

The screenshot displays a scheduling application interface. At the top, a navigation bar shows the current date and time: 9:21 AM, Thu, 3 Mar '16. Below this is a 'SHORTCUTS' sidebar with icons for Main, Appointments, Arrivals, Walkin Manager, Point Of Sale, Clients, Performance, and Exit. The main area is a weekly calendar grid for March 3-9, 2016. The grid shows time slots from 9:00 AM to 4:00 PM. Employees are assigned to various appointments, such as 'Meeting' on Friday and 'Lunch' on Saturday. A 'Choose Employee' dialog box is open in the foreground, listing employees like Anna, Chris, Helen, James, Katie, Lucy, Michael, and Michelle, along with their levels and statuses. The bottom navigation bar includes view options (Today, Day, Week) and a 'Done' button. Numbered callouts (A, B, C, 5, 6, 7, 8) highlight specific UI elements: A points to the navigation buttons, B to the calendar icon, C to the weeks dropdown, 5 to the employee icon, 6 to the employee selection dialog, 7 to the 'Done' button, and 8 to an appointment block.

- 9 Without releasing the mouse, drag the appointment block into its new position.
- 10 Release the mouse when you are happy with the position.
- 11 Click **done** to exit week view.

	Thu, 03 Mar	Fri, 04 Mar	Sat, 05 Mar	Sun, 06 Mar	Mon, 07 Mar	Tue, 08 Mar	Wed, 09 Mar
9:00 AM	Anna Audrey Patterson	Anna	Anna	Anna	Anna	Anna	Anna
9:15 AM	Audrey Patterson			Off			
9:30 AM	Audrey Patterson	Kathy Reed		Off			
9:45 AM				Off			
10:00 AM			Katie Morrison	Off	Tanya Doyle		Kayla Jones
10:15 AM	Mandy Mason		James King	Off		Amber Ashton	
10:30 AM				Off			
10:45 AM				Off			
11:00 AM		Emily King		Off	Tanya Doyle		Kelly Matthews
11:15 AM	Mandy Mason			Off			Kelly Matthews
11:30 AM				Off			Kelly Matthews
11:45 AM				Off			
12:00 PM	Yasmin Green		Meeting	Off	Lunch	Melinda Stacey	
12:15 PM				Off			
12:30 PM				Off			
12:45 PM				Off			
1:00 PM	Judy Harrington	Lunch		Off			Lunch
1:15 PM				Off			
1:30 PM				Off	Thomas Smith	Off	
1:45 PM				Off		Off	
2:00 PM	Off		Off	Off		Off	
2:15 PM	Off		Off	Off		Off	
2:30 PM	Off		Off	Off		Off	
2:45 PM	Off		Off	Off		Off	
3:00 PM	Off	Allisa Cameron	Off	Off		Off	
3:15 PM	Off		Off	Off		Off	
3:30 PM	Off		Off	Off		Off	
3:45 PM	Off		Off	Off		Off	
4:00 PM	Off		Off	Off		Off	Louise Simons
4:15 PM	Off		Off	Off		Off	
4:30 PM	Off		Off	Off		Off	
4:45 PM	Off		Off	Off		Off	
5:00 PM	Off		Off	Off	Melanie Goodman	Off	
5:15 PM	Off		Off	Off		Off	
5:30 PM	Off		Off	Off		Off	
5:45 PM	Off		Off	Off		Off	

Week View starting at Thu, 3 Mar 2016

< Week   < Day   **Today**   Day >   Week >

Weeks: 1

Employee   Done

SHORTCUTS

9:21 AM Thu, 3 Mar '16

Main

Appointments

Arrivals

Walkin Manager

Point Of Sale

Clients

Performance

Exit

---

Tools

Stock

Setup

---

Anna Owner Log Off



# SELECTING AND MOVING AN APPOINTMENT

- 1 Click on the **main** menu.
- 2 Click on the **appointments** icon.
- 3 Right click on the appointment block you wish to move.
- 4 Click **select**. You can select multiple appointments if required.
- 5 Navigate to the desired day on the Appointment Book.

The screenshot displays a software interface for managing appointments. At the top, a header shows the date 'Thu, 3 Mar' and the names of staff members: Anna, James, Lucy, Chris, and Katie. Below this is a grid representing the appointment book, with time slots on the left (from 9:00 AM to 5:00 PM) and staff members as columns. Various appointment blocks are visible, such as 'Audrey Patterson Full Leg Wax', 'Chelsea Grey Ladies Style Cut', and 'Allisa Cameron Full Head Highlights'. A context menu is open over an appointment, listing actions like 'Arrived', 'Checkout', 'Confirmed', 'Needs Review', 'No Show', 'Change Service', 'Select', 'Tag', 'CPC', 'Notes', 'Recur', 'View Week', 'Add to Group', 'Extra', and 'Delete'. The 'Select' option is highlighted with a blue circle and the number 4. On the right side, there is a 'SHORTCUTS' menu with icons for 'Main', 'Appointments', 'Arrivals', 'Walkin Manager', 'Point Of Sale', 'Clients', 'Performance', and 'Exit'. The 'Main' shortcut is highlighted with a blue circle and the number 1. At the bottom, there is a navigation bar with buttons for '< Week', '< Day', 'Today', 'Day >', and 'Week >'. The 'Today' button is highlighted with a blue circle and the number 5. The bottom right corner shows the user's name 'Anna Owner' and a 'Log Off' button.

- 6 Click on the folder icon at the bottom of the Appointment Book.
- 7 Click and hold on the grey tile next to the appointment block.
- 8 Without releasing the mouse, drag the appointment block up onto the Appointment Book, into its new position.
- 9 Release the mouse when you are happy with the position.
- 10 Click **yes** to confirm.

The screenshot shows a staff schedule for Thursday, 17 Mar 2016. The staff members are Anna, James, Lucy, Chris, and Katie. The schedule is organized into 15-minute slots. Appointments are shown as colored blocks: green for services and grey for 'Off' days. A folder icon at the bottom is highlighted with a '6'. A 'Selected Appointments' pop-up window shows a table with columns for 'Service' and 'Original'. The table contains one entry: Rachael Clarke, Ladies Style Cut, 11:30 AM, 03 Mar 16 with Anna. A confirmation dialog box at the bottom asks to move the appointment to 3:30 PM on 17 Mar with James, with 'Yes' and 'No' buttons. The 'Yes' button is highlighted with a '10'.

Time	Anna	James	Lucy	Chris	Katie
9:00 AM		Off		RDO	
9:15		Off		RDO	
9:30		Off		RDO	
9:45	Patricia Lawson Ladies Style Cut	Off	Daniel Ross	RDO	
10:00 AM		Off		RDO	
10:15		Off		RDO	
10:30		Off		RDO	
10:45		Off		RDO	
11:00 AM		Off		RDO	
11:15		Off	Olivia Black 1/4 Head Highlights	RDO	
11:30	Dean Carpenter	Off		RDO	
11:45		Off		RDO	
12:00 PM		Off	Olivia Black	RDO	
12:15		Off		RDO	Emily King Blowdry
12:30		Off		RDO	
12:45		Off		RDO	
1:00 PM		Off		RDO	
1:15		Off		RDO	
1:30		Off		RDO	
1:45		Off		RDO	
2:00 PM	Off		Simone Day Full Leg Wax	RDO	
2:15	Off		Simone Day	RDO	
2:30	Off			RDO	
2:45	Off			RDO	
3:00 PM	Off			RDO	
3:15	Off			RDO	
3:30	Off			RDO	

Information - Shortcuts Point of Sale

Move the selected Appointment(s) to 3:30 PM on 17 Mar with James?

Yes No



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