How to Book a New Appointment (On the Desktop Version)

1. Click **Calendar** at the top left corner of the window

2. Click on the preferred date of the appointment using the calendar tool on the left side of the window

3. Click **Day** (to the right of the calendar tool) to view the daily time slots

4. Click on the box that matches the preferred start time (on the left) with the preferred service provider (above)

5. Click **New Appointment** from the pop up menu and view the "Book Appointment" window

6. Click the **Select Service** drop down menu and select the preferred service

     Note: Click + **Add another service** to add multiple services to the appointment

7. Confirm that **Date** and **Time** are correct

8. Enter the dollar amount of the appointment in the **Price** text box

9. Enter the length of the appointment in the **Duration** text box

10.   Click the **House Call** drop down menu if your appointment is a House Call, otherwise click on "Not a House Call"

11. Click on **Appointment Type** and then select one of the following:

  • **RR** - Return Request: This tracks returning clients who are requesting a specific service provider

  • **RNR** - Return Non Request: This tracks returning clients who are not requesting a specific service provider

- **NR** - New Request: This tracks new clients who are requesting a specific service provider

- **NNR** - New Non Request: This tracks new clients who are not requesting a specific service provider

Click this link to learn more about this feature: <u>How to Track Customer Retention in Vagaro</u>.

12. Enter any appointment specific comments in the text box under **Appointment Note**

Note: Appointment Notes are appointment specific, Customer Notes are added to the client's profile

13. Is this a one time appointment, or will it reoccur? Under "Repeat" select from the following:

- **Off** for one time only

- **Daily** to repeat the appointment on a daily basis

- **Weekly** to repeat the appointment on a weekly basis

- **Monthly** to repeat the appointment on a monthly basis

Click this link to learn more about recurring appointments: <u>How to Book Repeat Appointments in Vagaro</u>

14. Is this a new client or a returning client?

     a. For <u>new</u> clients:

         i. Click **Create New** under the "Customer:" text box to view the **Customer Information** pop up form

         ii. Fill out the **Customer Information** form with the client's applicable personal information

         iii. Click the drop down menu under **Appointment Reminders By** and select the appropriate customer reminder method

         iv. Click **Save Changes**

     b. For <u>returning</u> clients:

         i. Click the **Name or Phone** drop down menu

         ii. Select the client in one of three ways:

- Scroll the drop down menu and select the customer's name

- Enter the customer's name

- Enter the customer's phone number

15. Need to add or change client information?

- Click **Edit** to modify the customer's profile (above right of "Customer:" drop down menu)

- Click **Notes** to view and add notes to the customer's profile

- Click **History** to see the customer's history, including their booking and purchase history

- Click the **credit card icon** to add or edit the client's credit card on file.

16. Click **Book**

• Your appointment will now be displayed and accessible through the calendar

Click this link to learn more about recurring appointments: How to Manage Appointments (On the Desktop Version)

How to Manage Appointments (On the Desktop Version)

1.   Click **Calendar** at the top left corner of the window.

2.   Click on an appointment

3.   Choose from one of the following:

- **Change Status:** Change the status of the appointment

    - Select: Accepted, Deny, Confirmed, Show, No Show, or Service in Process

- **Edit:** Edit the appointment

- **Notes:** View and add notes to the customer's profile

- **Forms:** View and add forms to the customer's profile

- **Customer History:** View the customer's history

- **Rebook:** Rebook the appointment

- **Print Ticket:** Print a summary of the appointment

- **Cancel:** Cancel the appointment

- **Move:** Move it to another date

- **Delete:** Delete the appointment

- **Check Out:** Charge a client for their appointment