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Country: Australia

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ABOUT THIS DOCUMENT

Tasks are used to allocate time on the Appointment Book for activities other than services, such as lunch breaks and meetings. This can help you better manage your time, by allowing you to plan out your daily activities on the Appointment Book.

The tasks feature is also fully customisable, so you can create tasks that suit your unique business.

Tasks are particularly helpful when used in combination with Online Booking. The Shortcuts Online Booking feature recognises when a task is scheduled on your Appointment Book, and will not allow clients to book a service during that time.

SCHEDULING A TASK

Click on the **main** menu.

2 Click on the **appointments** icon.

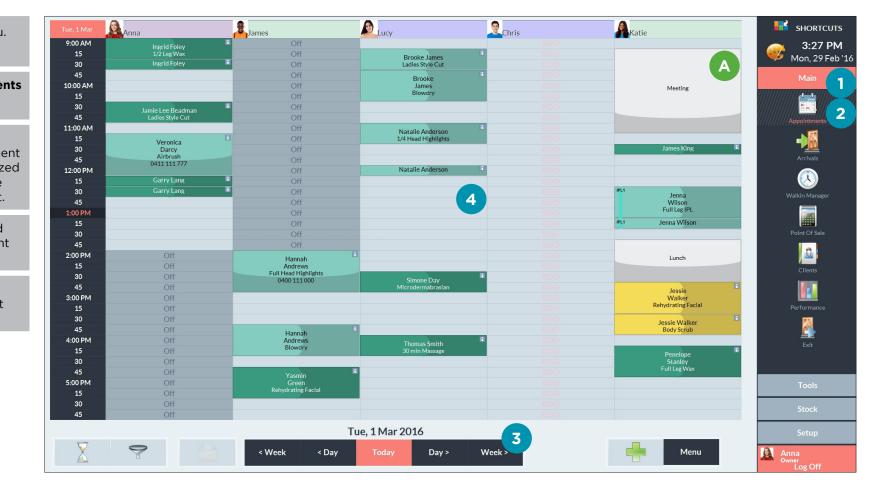
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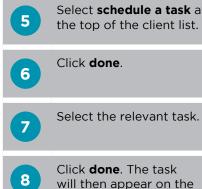
4

Tasks are displayed in white on the Appointment Book. They can be resized and moved in the same way as an appointment.

3 Navigate to the desired day on the Appointment Book.

> Click on the relevant time slot in the relevant employee's column.





Click **done**. The task will then appear on the Appointment Book.

Schedule a Task 5	А	М	Y		·	
#BUSINESS	В	N	Z	Show Me		Ap
#CLASS	C	0	0	□ Inactive		
#EXPENSE	D	Р	1		232	Wal
#GROUP	E	Q	2			
#STAFF	F	R	3	New	Quick	Po
#WALK IN	G	S	4			
Aaron Douglas 0404 440 004 (M) 07 3333 7373 (H)	н	т	5	СРС	History	Pe
Allisa Cameron 0477 111 171 (M)	1	U	6			
Allison Tenby 0488 338 888 (M)	J	V	7	Card	Merge	
Amber Ashton Choose a Task 0422 111 888 (M) Tasks			8	6		
Amy Newman Lunch 7 0411 777 888 (M) Meeting 7			9	Done	Cancel	
						Anna owne

Done

Cancel

Page 2

Delete

New

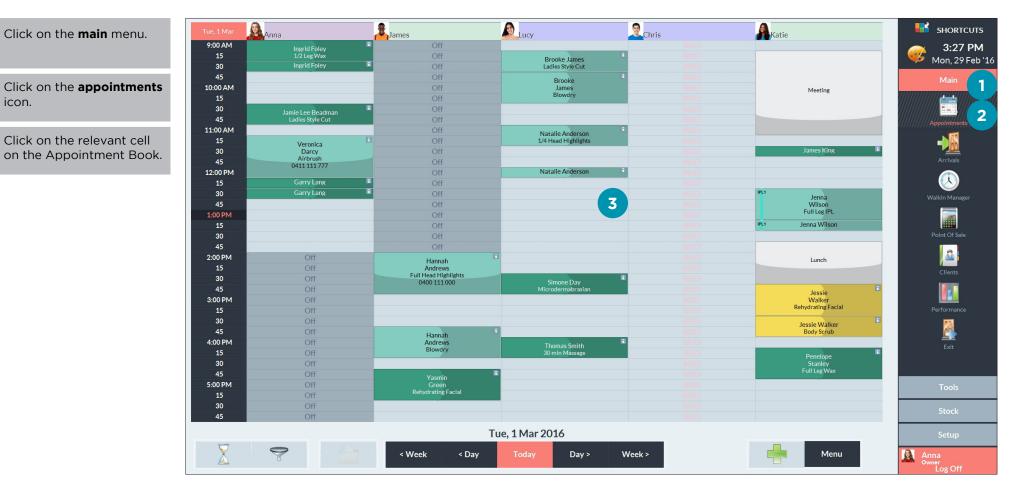
Edit

CREATING, EDITING AND DELETING A TASK

1 Click on the **appointments** 2

icon.

3



4

5

Select **schedule a task** at the top of the client list.

Click done.

6 If you want to create a task, click **new**.

Enter the name and the default duration of the task.

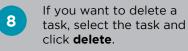
```
Click done.
```

7

If you want to edit a task, select the task and click **edit**.

Enter the new task name or duration.

Click done.



Click **yes** to confirm.

9 When you're finished, click **done** to schedule the selected task, or click **cancel** to exit the task window.

elect Client							
Search For			Delete		Sort By First Name		3:28 PM Mon, 29 Feb '1
Schedule a Task		А	М	Y	ristname	·	Main
#BUSINESS		В	N	Z	Show Me		Appointments
#CLASS		С	0	0	□ Inactive		Arrivals
#EXPENSE		D	Р	1		235	Walkin Manager
#GROUP		E	Q	2			
#STAFF		F	R	3	New	Quick	Point Of Sale
#WALK IN		G	S	4			Clients
Aaron Douglas 0404 440 004 (M) 07 3333 7373 (H)		н	Т	5	СРС	History	Performance
Allisa Cameron 0477 111 171 (M)		1	U	6			Exit
Allison Tenby 0488 338 888 (M)		J	V	7	Card	Merge	
Amber Ashton 0422 111 888 (M)	Choose a Task			8	5		Tools
Amy Newman)411777 888 (M)	Tasks Lunch			9			Setup
	Meeting				Done	Cancel	Anna ^{Owner} Log Off



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