Citrus Appointment Scheduler

User's Manual

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<u>Overview</u>

Citrus Appointment Scheduler is a program that schedules Appointments, at your place of Business.
You define your Business as Shop/Repair or Associate Sales based.
You create up to 8 Points of Service.
Shop/Repair related businesses may have lifts, service bays etc.
Associate based might have a stylist, barber, hygienist etc.
Associate based companies will track Sales by Associates.

You create a list of **Services** and their associated fees.
You can also create Sales items which may be used during an appointment.

As you create a new customer account, you can assign the account to an Associate if your business is Associate based.
While creating an appointment, you can change the point of service.

When creating an appointment, it can be scheduled immediately or stored and scheduled later.
Appointments can be rescheduled, deleted and/or invoiced.

Other Features are:
- Generate Sales Reports by Associate
- Print Daily Work Schedules
- Create a Service Contract
- Create a parts list for an appointment
- Create a Work Order
- Set Terms and Conditions for repairs
- Create a Holiday List
- Account Management (Statements, etc) via Bonus Programs

The Setup Screen

The *Setup Screen* is where you enter the information needed for the basic operation of the program.
It contains a File Folder with six tabs; one is a *Help* tab containing brief instructions about the other tabs.

Business Info
Enter the Information about your Business.

Points of Service
Create a list to which *Appointments* will be assigned.

Operations Tab (has sub tabs)

Printing
Form Selection – Service invoices can be printed using standard paper or Perforated Response Paper. Invoices can be printed in color or Black only.
If you opt for color, you can select 2 colors for Borders and Text.
You can select a font, but not a font size.

Phone Connections – used for auto dialing.

Assistance – set these options to be alerted when the program needs your attention

Taxation – Set Tax Rates and what to tax

Options Tab

>   *Work Day Scheduling -* These settings are used throughout the program to assign appointments to the proper days of the week.
>   Select the Workdays that you wish to schedule. This should be your normal workweek.
>
>   **Work Orders** – Select to print a Disclaimer and /or Terms statement on invoices. Select to print a statement if the customer requires replaced items be returned.
>
>   *Invoice Options* – The program can create Invoice Numbers or you can select a starting number which will increment after each invoice. You can select items which might regularly be added to invoices.
>   .

.Logo
 Select a Logo and Save it.
Your logo prints on many documents (Top – Center)

The Main Menu Screen

The Main Menu Screen has **two columns** of like sub-routines grouped together.
At the top of the screen are the **Menu Selections**, explained later.

Appointment Routines

Create an Appointment
Select the customer, schedule to a date and time or save and schedule later.

Schedule, Reschedule, Delete or Invoice
Appointment Slips previously created but not scheduled can be scheduled.
Appointments previously scheduled can be rescheduled.
Completed Appointments can be invoiced.
An Appointment can be deleted.

Print Day Schedules and Work Orders
At any time, you can print work schedules for any point of service and work orders for each appointment that day.

View Schedules at a Glance
View groups of four Points of Service by date on one screen**.**

Print Sales Report
If your business is Associate Sales oriented, you can print a Sales Report by assoicate and date range.

File Routines

Create or Modify Account Records
This is where you create new accounts or change information about existing Accounts.
The left side of the screen shows the basic Account information.

See **Creating Customer Accounts** for more details.

Create or Modify Services and Sales Items
Create a list of the Services that you will offer along with a price.
These Services and prices will be presented in drop down lists for selection when creating appointments.
The "Time" feature is used when creating an appointment to later create Daily Work Schedules.

Managing Inventory Items
Create a list of Additional Items which can be sold at the time of the Appointment.
(These items can be managed with Citrus Inventory Program.)

Add items to your inventory.
Each item is assigned to a category and has the following :
>Unit Cost
>Price
>On-hand
>Discount Price
>Discount Quantity (at what quantity will the discount price be used)
>Reorder When (inventory falls to this amount)
>Reorder Amount (how many to reorder)

Item count is decremented when an invoice is printed.

Create Holiday List
As Appointments are scheduled and rescheduled, the program checks if the day/date is a valid workday and that not a Holiday, Vacation, Personal or Sick day.
Click each day no scheduling will be permitted and save the list.
You can select individual Points of Service or all at the same time.

Other Routines

Create a Work Order
Produce a set of documents you can give to installers, etc detailing the needs of a job.
Services and Sales Items can be added to the Work Order.
This is not a Customer Document.

Create a Service Contract
You can easily create a Service Contract using the service data created for an account.
Information about the account is automatically selected. The Services you offer are preloaded into a drop down selection box.
Select the duration of the contract from a drop down list or enter manually.
You can select to automatically renew after the duration period.
You save the document and can modify or print it using a Word Program.

The Menu Selections

Files - displays a drop down menu with the following sub menus:
Create/Modify
Information needed about your Business and the way you do business is entered and can be modified by selecting this menu. See **Entering Information** (previously) for details.
Exit
Exit ends the program.
Order Forms – an Internet link to companies supplying the forms needed for Citrusware Programs.

Getting Started

Setting up the Programs Basic Files

When the program is first run, some information does not exist, unless you have previously installed a different Citrusware Program.
(Programs share common information).

The *Setup Screen* will automatically display. You can also display it at any time to modify existing information by selecting *Files* from the Startup Menu Bar, and then *Create/Modify* from the Drop down Menu.
(Clicking on our Logo advances the Tab Selection)

Business Info
Enter the Information about your Business.
Select the Type of address scheme to use (USA or International)
 If you use a USA Style address, you must enter a zip code.
The Pencil image reloads your data from a previously saved file.
The Eraser image clears all Business Data Boxes so you can re-enter if needed.
Define the your type of Business: Shop/Repair or Sales Associate Oriented.
Associate Oriented will track Sales, while a Shop/Repair business schedules appointments into an area of your shop or work space.

Points of Service
You can create up to 8 Points of Service.

Printing
Form Selection – Invoices can be printed using standard paper or Perforated Response Paper to create a tear off Summary Slip.
The Summary slip is used by the Office to post the Service Completion information and for Service Attention tracking.
Invoices can be printed in color or Black only.
If you opt for color, you can select 2 colors for Borders and Text.
You can select a font, but not a font size.

Work Preferences
These settings are used throughout the program to assign appointments to the proper days of the week.

Allow Scheduling These Days – Select the Workdays that you wish to schedule. This should be your normal workweek.

Phone Connections – You can use your Computers Modem to dial customers from a number of places within the program. Daisy chain a telephone off of your modem card. Tick the *A Phone is Connected* checkbox.
Find your modem port number in your computers Control Panel; Click START (lower left), Settings, Control Panel, Double click the Phone and Modem ICON, select the Modem Tab. Find the port number of your modem under the Attached To column and select that number from the *Modem is connect to Com Port* Box.

Program Assistance – Circumstances may arise where the program needs your attention.
Set the Alarms option to sound the system alarm when attention is needed.
Set the Show Prompts to display a helpful message when attention is need.
There are times when the alarm will sound or a message will display even if the option is turned off.

.*Logo*
 Your Logo consists of two files; the actual Logo image file which you provide, and a Logo description file the program creates.
It is important you copy your logo image file to your Citrusware Folder BEFORE selecting it.
Location: Hard Drive (usually C) : /Program Files/Citrusware
The program creates the Logo description file and locates it where the Logo image file resides.
If you were to select an image from a removable disc or a system disc which might not be available at all times, the program can not find it and an error will occur.

When all data is to your satisfaction, Click Save *Changes / Return to the Menu* button.
Setup is complete.

Creating Services and Sales Items
After completing the Setup Screen procedures, create a list of Services and Sales Items you offer and sell.
Services will appear on the Appointment Creation Screen in a drop down list.

Enter a service description, Cost and Time.
Click *Save Service* button.
The procedure is identical for Sales Items except no time is entered.

<u>The Customer Screen</u>

NOTE: Customer records are stored in a file named CustomerData.txt.
It is a **structured text file**, which means each element within the record has a fixed length.
You can view it using any Text Editor such as Notepad, **but do not alter the contents**.
Modify Customer records only while viewing the Customer Record with the customer screen of any Citrusware program.

Creating customer records
To create a new customer, click *Customer Routines* then *Add a New Customer*. The Data fields will be cleared.
If you change your mind, click *Cancel Add* and the Add routine will be exited.

A customer is either a Business or an Individual.
Select the customer type 1st when creating a new customer.

Business customers have one name field, while individual customers have a title, first name, middle initial and a last name.

Customers appear in the order in which they were created.

Modifying a customer record
Simply type over the data you wish to modify. Taking any action after making changes will save the customer record.

Deleting a customer record
To delete the current customer, click the **Files Menu** then **Delete this Customer**.
Click *Yes* to confirm the deletion and the customer record will be removed from the Customer File.

Finding customers
You can **navigate** through the customer file:

- **<<** returns to the first customer record
- **<** steps back one Customer from the current record
- **>** steps ahead one Customer from the current record
- **>>** steps to the last Customer in the file

You can "**Search**" for a Customer by clicking the "Search by Criteria" Button.
The "Customer Search Screen" is displayed.
Select a *Search Criteria* example - Street Address.
Enter *Search Data* example – Main St
Click Search

All customer records containing the *Search Data* in the *Search Criteria* field will be displayed in the C*ustomers Found grid*.

You broaden your search by decreasing the search data.
Main will produce Main St, W Main St, Main Ave, Mainland St, etc
You lessen your search by increasing the search data.
123 Main St will produce only 123 Main St

Note the difference between *by Last Name* and *by Business Name*.
Last Name finds individuals, B*usiness Name* finds businesses.

Searching is not case sensitive, in other words, if you enter *Smith*, all customer records with Smith or smith in the name field will be found (including Blacksmith, Smithson, etc).

Once you have selected the "Search Criteria" and entered the search data, click *Search*.

Click on the customer that you wish to select and the customer record will be loaded to the customer screen.

If only one customer record meets the search criteria, it loads automatically.

If no record is found, you can create a new record at this time.

You can **"Select"** a customer by clicking "Find Account in Name List" button.

Clicking "Name List" displays a dropdown list on top of the Customer Name box.

This list contains all of your customers and is alphabetically sorted.

You can click the arrow on the right side and the list drops down to display all of your customers.

You can scroll through the list to find a customer and click on it to load it.

You can also start typing customer information into the top portion of the list and the next customer that contains what you have typed will be loaded. Continue to type until the correct customer loads.

Press the <TAB> key to hide the list and load the customer.

The "Name List" button is a toggle button. Clicking it again will hide the Customer Select List.

Customer Auxiliary Data

The Toggle Aux Screen Button displays the Auxiliary Data screen where you can store unique data about each customer account. There are 6 data boxes with Headings.

The Headings apply to ALL customer accounts. (In other words, if you set Heading #1 to "Date Installed", that's the Heading #1 for all accounts).

The data, however, can differ for each account.

Once you decide what each data box will contain, delete the Default Heading and type a new heading. Click the Save Headings button when all new headings are entered.

As you select or create new accounts, you can enter Auxiliary Data.

The Clear buttons clear the data box to the left for the current account.

Creating a Holiday List

Click Create *Holidays List* on the Main Menu Screen

The "**Holidays Screen**" is displayed.

Click on the calendar to select day to assign as Holidays.

Important: Click Selections Complete when the list is to your satisfaction. Then click Save.

When creating New accounts and assigning the first Service Date, and automatically rescheduling as a result of Service Completion Posting, if the selected date is a Holiday, then the next available date is selected. This can result in a "pile-up" on Mondays and Tuesdays, something you should watch for.

Using Citrus Appointment Scheduler

Creating an Appointment

Once you have created all needed files you can start to Create Appointments.
From the Main Menu, select Create an Appointment.
The Customer Screen will display. Select the customer for whom you wish to create an appointment.
(Verify the point of service is correct. (This can be changed as you create an appointment)
Click Select this Account and Start Routine.
The Appointment Creation Screen will display.

Services
Click each service you will perform during this appointment.
Click Add Service to Appointment Button The cost and Time Allotted will be stored along with the service description. When you have selected all services to be performed, Click All Services Have Been Selected Button.

Sales Items
When you created Sales Items, each was entered into a category.
You can select items by selecting a category first, then individual items.
Select all Sales Items to be used during this appointment. Enter a Quantity, Click Calculate. The Total Cost will be calculated. Click Add Item to Appointment
Click Create Appointment.
The Appointment Summary Screen will overlay. You can save the Appointment Slip and schedule it later, or you can select to schedule it now.

If scheduling now, select a date from the Calendar. (Make note of the time required)
Click Schedule Appointment for this Date Button.
The day schedule for the selected date and point of service will display.
Select a time by clicking in the day schedule grid.
The program looks to see if enough free time exists. If so, the appointment is scheduled.

Scheduling, Rescheduling, Deleting and Invoicing Appointments

Scheduling a Saved Appointment
Click the Schedule **Reschedule Delete** Button from the Main Menu.
The Appointments screen will display.
Select the Point of Service where (or to) this appointment will be assigned.
Click Schedule an Appointment Radio button.
The grid will fill with all appointments which have not been scheduled.
Select an appointment in the grid (click on it).
Click a date on the calendar.
The Day Schedule will fill for the selected date.
Select a time. If enough time remains, the appointment will fill in the day schedule.
Click *Schedule Appointment – Save Day Schedule*.

Rescheduling an Appointment

Click the *Schedule Reschedule Delete* Button from the Main Menu.
The Appointments screen will display
Select the Point of Service where (or to) this appointment was be assigned.
Click Re-Schedule an Appointment Radio button.
The grid will fill with all appointments which are scheduled for this point of service.
Select an appointment in the grid (click on it).
Answer YES to the *Remove Appointment Slip* prompt.
The appointment will be removed from the scheduled date.
Click on a Date in the calendar.
Click a Start Time in the Day Schedule.
 If enough time remains, the starting point will be replaced with *Schedule Here* and the *Re-Schedule Command* button will illuminate. Click it and the appointment data will fill the day schedule.
Click the *Schedule Service Command* button and the Day Schedule will be saved.

Deleting an Appointment

Click the *Schedule Reschedule Delete* Button from the Main Menu.
The Appointments screen will display
Click Delete an Appointment Radio button.
The grid will fill with all appointments.
Select an appointment in the grid (click on it).
The *Delete Command* button will illuminate. Click it.
To DELETE the appointment, answer YES to the Delete Prompt

Invoicing an Appointment

Click the *Invoice Completed Appointment* Button from the Main Menu.
The Appointments screen will display
Click Invoice an Appointment Radio button.
The grid will fill with appointments scheduled on or before today.
Select an appointment in the grid (click on it).
The *Invoice Command* button will illuminate. Click it.
The Invoicing Screen will display.
Customer data, Services and Sales items with quantities will fill the invoice screens.

The Invoice form has three main windows, **Invoice Setup**, **Invoice Creation** and **Print Setup**.
You can toggle the windows with the menu selection "*Open Windows*".
You can use this toggle to review the invoice as you create it, go back and change entries.

If you do **not** need to modify the invoice, click the *Open Windows* menu and select *Show Print Setup.*
Skip down to Finalizing the Invoice.

Adding to and Changing the Invoice
Initially, the **Invoice Setup Window** is opened.
Here you can enter "**To the Attention of Information**", and/or **Reference**, and change the **Invoice Number**.
The Invoice Number must be numeric and will increment when the current invoices prints correctly.

You can activate or deactivate **volume pricing** on any invoice.
(Each inventoried item has a per unit price, a volume price, and a quantity at which the volume price will be used)
You create volume discounts when you create Inventoried items.

If a customer is tax exempt, tick the **Account is Tax Exempt** checkbox.
During setup, you entered 1 or 2 tax headings and rates.
There might be an occasion where you sell to a locale where a 2nd tax rate may not apply.
Set or reset the Apply 2nd Tax Rate as needed.

If the invoice has been paid, set the Invoice is Pre-paid checkbox.
When satisfied, click *Continue……* command button

Creating the Invoice Body
When you select **Continue**, the **Invoice Creation Window** is opened.
This is where you can add to the invoice.
You can select inventoried items, services, and/or labor.

Entering Inventoried Items
Click *Add to Invoice* then *Inventoried Items* from the drop down menu.
The Inventoried Items Window will open at the top of the invoice.
The box on the right contains all item categories. Click a category to load items into the *Items List* box.
Select an item you wish to add to the invoice. The price will be selected automatically.
Enter units sold. Click *Post to Invoice*.
Quantity discounts are applied if you selected this option with the Check Box during invoice setup.

Entering Custom Items
Click *Add to Invoice* then *Custom Items* from the drop down menu.
The Custom Items Window will open at the upper-right of the invoice.
Select an item you wish to add to the invoice. The price will be selected automatically.
Enter units sold. Click *Post to Invoice*.

Entering Services
Selecting services is identical as selecting **Inventoried Items** with two exceptions.
1. If the service quantity is left blank, it will default to (1).
2. The calendar date is added to the invoice in the service Date field.
   (Click the date before posting the service to the invoice)
   (You can add a date to any other item, labor or manual entry if you wish)

Entering Labor
Click *Add to Invoice* then *Labor* from the drop down menu.
Up to 3 labor rates will appear. (As created on the Items and Services screen).
Enter Hours in any of the three Hours Boxes. Click **Tabulate** then **Post to Invoice**.

Deleting an Item
An item can be deleted after it has been posted to the invoice.
Left click the item in the grid to select it.
Right click to display the delete item prompt. Click **Delete Item** then confirm deletion by clicking **Yes**.

Note: If you are using **Discount Volume Pricing**, changing quantity or price is not recommended; better to delete the line item and re-enter.

Completing the Invoice
When invoice items are complete, click the *Continue…..* button.
The Invoice **Creation Window** will close and the **Print Setup Window** will open.

The Return to Menu button
You can exit the invoice creation by clicking the **Return to Menu** button. No data is saved.

Finalizing the Invoice
Clicking the **Continue** button (above) opens the **Print Setup Window**.

Terms
Directly below the invoice image is the **Invoice Terms** box. If you have saved terms previously, the box will contain your default terms. Ensure these are the terms you wish to apply to this invoice.
If not, drop down the box and select different terms.
You can save any selection as your default terms by clicking the **Save as *Invoice Default Terms*** button.

Discount
You have three Discount options; none, Direct (flat) or calculated and time limited.
Select the radio button that meets your needs.

None – No discount will be offered.
Flat Rate – Enter a discount amount and it will be directly subtracted from the invoice.
Calculate – Select a (%) and the number of days the discount is valid. This amount IS NOT deducted from the invoice. It is shown as a discount offered on the invoice.

Additional Charge
Place the cursor in the **Addl Charge** box on the **Summary Window** and enter a cumulative charge if needed.

Click the *Finalize* button and review the data in the Summary Window.
All taxes, discounts, and additional fees are calculated at this time.
If correct, click **Print Invoice**, if incorrect click **Clear Totals/Addons Redo**.

Creating a Work Order

Click *Create a Work Order* on the *Main Menu*
Select a Customer from your Customer List.
Click *Create*.
The *Work Order Creation Window* is opened.
If you have previously created a Work Order Template, it will be loaded into the Work Order Narrative Box.
If not, you can create a Narrative and save it for use with future Work Orders.
If the loaded Narrative is not suitable, you can clear the box and type a new narrative.

Select a Heading from the drop down Heading Box.
Choices are Work Order, Service Order or Repair Order.
(You can enter something different but be careful that it will fit when printed).

Sales Items and Services that you created earlier can be added to the Work Order.
Select them from the list.
You can change a preset price at this time.

If you wish to print a Completion Summary Report at this time, set the Checkbox , *Print Completion Summary Report* to on.
A Completion Summary Report is a separate document that can be used by the Servicing Personnel to state any anomalies found and any tasks that could not be completed.

Click Print WO when the Work Order is prepared.

Creating a Contract

Click **Create a Service Contract** on the *Main Menu*.
Select a Customer from your Customer List.
Click *Create*.
The Service Contract *Creation Window* is opened.

Follow the instructions on the left side of the window.