## **CREATING A NEW APPOINTMENT WINDOW OR RECURRING SET OF WINDOWS**

1) In your menu select "Schedules & Services"



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3) Create an appointment window or set of appointment windows (You can create an appointment window for a single day or a set of recurring appointment windows):

**Title -** You can name this whatever you want. Titles show on your calendar view allowing you to see which set of appointment windows you are looking at without having to click on them. It can also help you deconflict schedule conflicts (more on that later).

**Start Date & End Date -** If you want to create an appointment window for only one day then set the Start Date and End Date to the same day. If you want to create a recurring set of appointment windows set the start and end date for the recurrence

**Start Time & End Time** - The time period that you would like to offer your services on the given days.

**Select Days -** These only show up if you are creating a recurring set of appointment windows (i.e. your Start and End dates are not the same). Select the days of the week you want this appointment window to be offered.

Click "Continue" to move to the next screen



4) Select the services and durations you wish to offer during this appointment window and select the rate you wish to charge for each:

**Services Offered** - Currently the defaults are Swedish, Deep Tissue and Sports but if you wish us to add more options please provide us with feedback

Durations - 60, 90 and 120 Minute options

**Base Rate vs Custom Rates -** Base rates are the rates you set as your default rates in your profile. You can also create custom rates for an appointment block. Say you want to charge more on weekends or offer a mother's day discount; Truzen lets you set your own pricing

**Est. Take Home -** This is what you should expect to take home for this appointment after Truzen's fee.

Click "Save Rate" and this appointment window or set of recurring appointment windows

5) Resolving Schedule Conflicts:

If after you click "Save Rate" a Schedule Conflict warning pops up that means that you are trying to create an appointment window that overlaps with an appointment window that you already created. To prevent you from accidentally offering simultaneous massages we the app will require you resolve the conflict before you can save the new rate.

Here is where Titling your appointments windows comes in handy. In the pop-up window it will tell you how many conflicts there are and what the Title of the appointment window you are conflict is.

You can resolve the conflict either going back and adjusting the times/dates of the new appointment window or going back to your calendar to adjust your older appointment window.



## ADJUSTING PREVIOUS CREATED APPOINTMENT WINDOWS

1) Select the an Appointment Window you would like to modify

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2) Select how you wish to edit the appointment:

Edit just for selected date - If this appointment window is part of a recurring set of appointment windows this option will allow you to edit only this date. Doing this will turn it into a new window separate from the recurring set and allows you to make edits to a specific day without impacting other windows in the set.

**Edit all in series -** If this appointment window is part of a recurring set of appointment windows this option will cause any edits made to effect all appointments windows in the set.

**Remove for selected date -** This will delete the appointment window for this date and this date only, even if it's part of a recurring set.

**Remove all in series -** This will delete the entire set of appointment windows for all dates.

**Cancel -** Will take you out of edit mode and return you to the calendar screen.



3) If you select one of the two edit options you will be taken to the edit appointment window screen and can follow steps 3-5 under "CREATING A NEW APPOINTMENT WINDOW OR RECURRING SET OF WINDOWS"