



Scheduling Software for
the Internet Age

Picture Upload Module

Version 1.0



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Overview

The Picture Upload Module allows you and/or your customers to upload pictures into your Appointment-Plus account. Pictures can be uploaded for customers, pets, children, and staff. They are saved in the system and attached to the profile of the entity.

Examples of uses for the Picture Upload Module include:

For Customer, Pet, or Children Pictures:

Hair Salons

A hair salon can have their customers upload a current picture of themselves as part of the appointment-making process. This can help better prepare the stylist and can also let both the stylist and the customer see the customer's hair style progression over time as well as compare before and after photos.

Pet Groomers

Similar to a hair salon, a grooming studio can allow their customers to upload pictures of their pets. This allows the groomer to work more effectively with both new and existing clients. Groomers can quickly identify potential issues or challenges by previewing incoming pets. They can also better allocate resources by having more accurate, visual information on the pet. Additionally, pet groomers can quickly view the grooming history of a particular pet.

Service Businesses

For virtually any type of business providing a service, allowing your staff to view a picture of a customer prior to their appointment can significantly improve the level of personalized service. It makes it much easier to identify, remember, and personally greet customers if you can review their photo before their appointment.

Examples of services businesses that can benefit from this include:

- Massage Therapists
- Medical Spas
- Salons and Spas
- Pet Care Services
- Personal Trainers
- Tax Advisors
- Doctors
- Chiropractors
- Acupuncturists and Other Holistic Practitioners
- And many others



Educational Institutions

Whether for academic advising, testing or other student services, educational institutions such as universities, colleges, and schools, can benefit from maintaining pictures of students in their accounts. Similar to service-oriented businesses, being able to connect a picture to a student's name can vastly improve the service level to the student and the relationship between the student and the staff member.

For Staff Member Pictures:

Service Providers

There are many types of service providers that could benefit by displaying a picture next to a staff member's name or profile when a customer is making an appointment. It not only provides a more vivid, visual experience for the customer, but it allows the customer to better feel that they are making an appointment with a real person. This is important in helping to increase the customer's level of confidence and comfort in using the system.



How Does It Work?

You can enable the Picture Upload Module at any time via the Options link in the Company section of your account. The module enables the following:

Customers

- Upload and view pictures of customers via Site Administration.
- Allow your customers to upload pictures of themselves.
- Display the customer's picture when the customer logs in.

Example of a customer picture displaying when they log into the Customer View

Example of a customer uploading a picture via the Customer View



Pets or Children, if applicable

- Upload one or more pictures of a pet or child via Site Administration.
- Allow customers to upload one or more pictures of a pet or child when making an appointment.
- View all of the uploaded pictures for any pet or child when viewing their profile or current/past appointments.

Example of customer and pet pictures displaying when making an appointment in Site Administration

Staff

- Upload one or more pictures of each staff member.
- View the pictures when looking at a staff's profile or making an appointment.
- Allow customers to view pictures of staff members when making appointments.



Limiting the number of images uploaded

A maximum of 10 images can be uploaded per customer. You can adjust this setting to be any number below 10 to help control the number of pictures being uploaded. This will be explained further in the Preferences section below.

Resizing of images

The system automatically resizes the images to a height or width of 75 pixels. If the image has a larger width than height, the image will be given a width of 75 pixels. The height will remain proportionate to the width. Likewise, for a picture that has a height larger than its width, the height will be saved as 75 pixels with a proportional width. Pictures that are a perfect square will be resized to be 75 by 75 pixels.



This is an example of a picture that is 75 by 75 pixels:

One of the main reasons for doing this is the enormous amount of server space needed to house images. By resizing the images, it protects against people uploading huge images requiring an unnecessary amount of server resources.

The system also saves a small, thumbnail version of each picture. This smaller version is used in various places in the system that don't require a larger image.

Example of the thumbnail version

The screenshot shows the Appointment-Plus web application interface. At the top, there is a navigation menu with options like 'appointment', 'pps', 'time clock', 'customers', 'staff members', 'treatments', 'reports', and 'gift certificates'. Below the menu, there is a 'Customer Search' section with a search form. The search form includes a 'Location' dropdown set to 'North Location 12', a 'Search By' dropdown set to 'All fields in list', a 'Search Text' input field, and a 'Sort By' dropdown set to 'Last Name'. Below the search form, there is a table of search results with columns for 'Customer Name', 'E-mail Address', and 'Phone Numbers'. The table contains two entries: 'Barnett, Robert' and 'Bayers, Martin'. At the bottom of the page, there is a footer with the text 'New Features | Let an appointment service book your appointments' and 'Support Level Extended | submit a question | review submitted questions or call (480) 483-1199 | upgrade'.

The thumbnail version is also used when viewing a customer's information via My Mobile Schedule (the mobile version of Appointment-Plus).



Uploading images

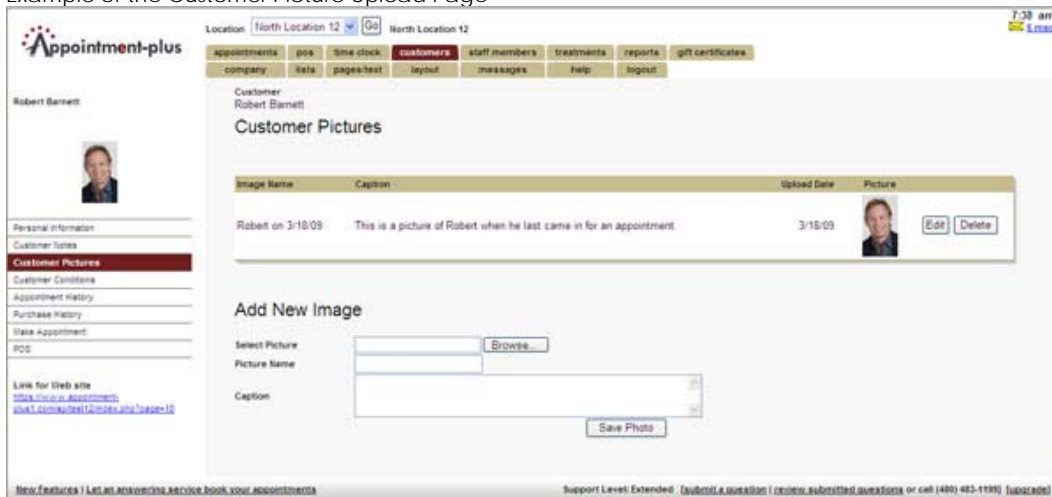
When you have the Picture Upload module enabled, you will see additional links in the following Site Administration areas:

Customers

When you look up a customer and click on their name to access their information via the Customer Search page, you will see a "Customer Picture Upload" link. When you click on that link, you will be able to do the following:

- View, change or edit any pictures that have been uploaded for the customer
- Delete any uploaded pictures
- Upload additional pictures

Example of the Customer Picture Upload Page



Pets or Children

Similar to customers, when you access the details of a pet or child via the Customer Search page, you will see an upload link listed on the left side navigation. By clicking on that link, you will be able to maintain pictures of the pet or child in the same fashion as you would for customer pictures.

Staff

When you click on your Staff Members tab, it lists your staff names. By clicking on a staff member's name, you access their profile and setup information. When the Picture Upload Module is activated, you will see an additional "Staff Picture Upload" link. That page allows you view and maintain previously uploaded pictures for the staff member and upload new pictures for them.

When uploading pictures, you can include a picture name and caption. This helps to identify the picture.



Preferences

You can control key picture upload settings to help ensure proper usage for your specific needs. The following are preferences you can control via the Picture Upload section of Preferences section in Site Administration:

Customer Pictures

- Allow Site Administration users to upload customer pictures.
- Allow customers to upload pictures.
- Have the customer's pictures display on the front end when they log in.
- Limit the number of pictures a customer can upload.
- Limit the number of pictures that can be uploaded for a customer through Site Administration.

Staff Pictures

- Allow or disallow staff pictures to be uploaded via Site Administration.
- Limit the number of staff pictures that can be uploaded via Site Administration.
- Display the staff picture next to the staff member's name on the Customer View.

All

- Only allow Headquarters Administrators to upload and maintain images.
- Only allow Headquarters Administrators to delete images.
- Only display pictures after Headquarters or Location Administrator approval.

If you allow more than one picture per entity (staff, customer, pet, or child), the most recent picture will be the default picture. So, for example, when you are making an appointment and select the customer, the picture that displays next to their name will be their most recently uploaded picture.



Monitoring Pictures



Whenever you allow customers or staff to upload pictures, it's a good idea to monitor the pictures that are being uploaded. The Appointment-Plus Picture Upload Module allows you to view any pictures uploaded to your account through the Picture Monitor page. You can also edit or delete any picture. This functionality is limited to Headquarters and Location Administrators.

Optionally, you can set a preference that only allows pictures to display after they have been approved by the Headquarters or Location Administrator. Review and approval for pictures is also done on the Picture Monitor page.

On the Picture Monitor page, you can search under any date. The page will list who uploaded the picture, including whether it was uploaded by a staff member or a customer, and the date they uploaded it.

Example of the Picture Monitor Page

The screenshot displays the Appointment-Plus web interface. At the top, there's a navigation bar with the 'Appointment-plus' logo and a menu of options including 'appointments', 'pos', 'time clock', 'customers', 'staff members', 'treatments', 'reports', 'gift certificates', 'company', 'lists', 'pages/test', 'layout', 'messages', 'help', and 'logout'. The 'customers' option is highlighted. Below the navigation bar, there's a sidebar with links for 'Search Customers', 'Add New Customer', 'Merge Customers', 'Customer Upload', and 'Picture Monitor' (which is selected). The main content area is titled 'Picture Monitor' and has a date selector set to 'March 25 2009'. Below the date selector is a table with the following data:

Uploaded By	Upload Date	Picture Name	Caption	Picture
Jo (staff member)	3/25/09	Jerry Smith	Jerry's picture when he was last in	 Edit Delete
Robert Barnett (customer)	3/25/09	Robert Barnett	Robert in a white shirt and sweater	 Edit Delete

At the bottom of the page, there's a footer with links for 'New Features', 'Let us answer your service book your appointments', 'Support Level Extended', 'Submit a question', 'Review submitted questions or call (480) 483-1199', and 'Upgrade'.

