

USER GUIDE

Complete guide and tips on using ScheduFlow

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SETTING UP A TRIAL ACCOUNT

When you launch **ScheduFlow** for the first time you need to create an account. Here we will show you how to setup a 30 day free trial account.

To set up a trial account:

- 1. Click the tab Create 30-Day Free Trial Account.
- Fill in your Application Account and Billing Account information.
- 3. Click Create My Trial Account.



The trial version includes all the features of the licensed version and the data that you enter during the trial period will securely be transfered to any future subscription plan you might purchase.

Duoserve ScheduFlow 16 Login — 🗆 🗙
Existing Account Login Create 30-Day Free Trial Account
Fill this form to begin using the application immediately.
Application Account (used to log into the application)
Account Name:
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Create My Trial Account
Not logged into account.

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Once your account is set up you can login and start using **ScheduFlow** straight away!

MANAGING USERS

Creating and managing user accounts

When you log into ScheduFlow using your main account information you are initially in a Single-User Mode. This means that all the information and administrative privileges are accessible.

This can be favorable if you are the sole user of ScheduFlow, if you share it only with a few select people or if you want all the users of to always have full rights to everything in the calendar and Client information.

In some cases, when several people are using ScheduFlow together, it's recommended to enable the Multi-User Mode. This gives each user a personal login and password and an individual set of privileges.

To enable Multi-User Mode click **Set Administrator Password...** under the Administrator -tab. Enter a secure admin password of your choosing and click **Set Password**.



Once the Multi-User Mode is activated, there will be a second layer of security once ScheduFlow is logged into the server, further prompting the administrator and other users to login with their respective credentials.



Clicking Manage Users... under the Administrator -tab lets you add, delete and edit users.



To add a user, click **Add User** and fill in the required information. You need to set what privileges a user will have by clicking the **Member of Group** -row and selecting an option from the drop-down menu. Each Group Description explains what privileges the selection entails. There are default groups which fit most scenarios but you can also create your own groups by clicking **Manage Groups...** under the **Administrator** -tab and create specific rules for accessing your calendar.

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NAVIGATING THE CALENDAR

Understanding Panels, Calendar Views, Searching and more

ScheduFlow has four main panels to help you navigate the application. The Appointment Calendar¹, the Date Navigator², Calendars³ and Labels⁴.

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The **Date Navigator** lets you select the date or dates you wish to view in the calendar. You can select a single day, multiple consecutive dates by simply clicking and dragging, or a selection of non-consequtive dates by holding down the CTRL -key on your keyboard and clicking the dates you wish to view. Clicking the **Today** -button takes you back to today's date.

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In the top left corner of the application window there are pre-made shortcuts to help you quickly navigate the most common time frames.

You can set the calendar to a **Day View** a **Work Week View**, a **Week View**, **Monthly View** and a **Timeline View**, which puts each Resource on a horizontal axis and shows their Appointments in chronological order. Each of the views can display one or multiple Calendars / Resources.

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The **Day View** displays a full workday for each Resource. To the left is the **Time Ruler** that shows the time-of-day.

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The **Timeline View** displays each Resource on a horizontal axis and shows their Appointments in chronological order. Hovering the mouse cursor over an Appointment gives you more detailed informatio about it.



In the **Day View** or **Work Week View** the **Time Ruler** is displayed to the left, showing the time of day.

If you right-click anywhere on the **Time Ruler** you'll be able to quickly create new Appointments and change the view format, just like in the shortcuts mentioned above. You can also set the time-interval to be displayed.



Under the **Calendar** -tab you can control how you want your calendar to display. The **Views** -options are the same as the shortcuts at the top. You can **Group By None** to have it display all the Resources' Appointments for the selected date, **Group By Resource** to group it by according to the selected Resource(s) or **Group by Date. Import from Outlook** lets you synchronise data from your Outlook calendar.

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hppoint		Thur	day, May 28				May	(1) 2020	9
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30	[Meeting Room]		ICK DO NOT BOOK	Co	nrad Brissels Available		- 31 1 2 3	3 4 5	<u>-</u>
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T	Denisse Kim Training (Josiah Clements)	C Brian Anderson	Lunch		-		Kelly Carlson		U
30	-								-
2 .00	-	for the company p	eting with catering service arty - [Meeting Room]						_
30		-			an Anderson Meeting (Ora Kerr) - [Meeting om]		ibels 📃	• •	×
3 .00							(None)		^
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😑 Read	dy Auto Refresh Enabled				🤔 Last Refreshed	6/13/2	020 5:22:15 PM. Up	dates Four	nd.

Group By None will group all Appointments for the selected Resources and dates.

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1	5 Work Week View	Group By None	Import from Outlook		
View	31 Month View	Group By Resource	🖄 Synchronize to Outlook		
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	Brian Anderson	Cor	nrad Brissels	Denisse Kim	▲ ④ May ④ ④ 2020 ④
	Thursday, May 28	Thurs	sday, May 28	Thursday, May 28	SMTWTFS
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8 00					20 10 11 12 13 14 15 16 21 17 18 19 20 21 22 23
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0 00				Following up on customers.	Calendars 🔲 🗖 🗖 🕸 🛪
30					
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Group By Resource will sort the Appointments into a column under the selected Resource.

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		Wednesday, May 2	7		Thursday, May 28		•	May 🕑	④ 2020	X ()
	Brian Anderson	Conrad Brissels	Denisse Kim	Brian Anderson	Conrad Brissels	Denisse Kim		SMTW 18 26 27 28 29		
30								19 3 4 5 6	789	
800								²⁰ 10 11 12 13 ²¹ 17 18 19 20		
- × -								22 24 25 26 27		
30								23 31 1 2 3	4 5 6	5
9 º0_ 30	Meeting with	Training (Elizabeth Mcintosh) - [Meetin Room]	BLOCK DO	BLOCK DO NOT BOOK - [Meeting Room]	Available	BLOCK DO		Today		
10 00	Advertising Agency - [Meeting Room]	Call to confirm day	NOT BOOK Following up on	-		NOT BOOK Following up on	6	lendars 🛅 📔		x
30	Looking for new	before.	customers.	-	^	customers.		Alex Johnson		~
11 00	ways to expand our advertising, Get							Brian Anderson		ñ
30	quotes and find out				•	· · · · · · · · · · · · · · · · · · ·		Conrad Brissels		
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30								Kelly Carlson Melincia Maynard		U
1 ⁰⁰ _30	2 Lunch		Manager Session (John Hardy) - [Location A]	2 Lunch		Training (Josiah Clements)		Melissa Hess		-
200			Please bring		Meeting with		La	bels 📑 📕		×
30	Initial Consultation -	Meeting with	documents with you,	Meeting (Ora Kerr) -	catering service for the company party -	-		(None)		-
3.00	[Meeting Room]	- [Meeting Room]	/	[Meeting Room]	[Meeting Room]			Confirmed		
30		Looking for new	-			-		Available Cancelled		
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😑 Read	ly Auto Refresh	h Enabled				Last Refreshed 6	5/13/20	20 5:26:36 PM. Up	dates Found	d. //

Group By Date will sort the Appointments into columns under the selected dates.

You can use the field in the top right corner of ScheduFlow to search the calendar, either by scrolling in the list or by entering a search query.

lp Licen			66	Search By Client	🔻 x 🔉 🚿	2 +					
	565		~~~~	Display Name	First Name	Last Name	Address	Company Name	Home Phone	Work Phone	
											1
ok				Elizabeth Mcint	Elizabeth	Mcintosh	762-1791 Elit,	Yahoo	(909) 262-9732	(381) 250-8364	٦
				Josiah Clements	Josiah	Clements	2336 Ut St.	Chami	(405) 249-5506	(167) 949-3492	
				Graiden Brewer	Graiden	Brewer	862-2448 Susp	Finale	(946) 825-8216	(328) 647-3441	
			Dat	George Duran	George	Duran	2241 Cursus Av.	Cakewalk	(847) 614-0420	(666) 792-7340	
Thursda	ay, May 28		▲ (Logan Frederick	Logan	Frederick	139-9544 Cum	Sibelius	(293) 325-1831	(681) 315-9815	
Conra	d Brissels	Denisse Kim		Hiroko Lindsay	Hiroko	Lindsay	Ap #412-5638	Macromedia	(283) 130-9730	(808) 480-0758	
				Gillian Stein	Gillian	Stein	401-5026 Vita	Finale	(206) 630-4865	(909) 344-6020	
				Halla Clayton	Halla	Clayton	P.O. Box 453,	Yahoo	(570) 227-6323	(695) 664-9766	
				Petra Curry	Petra	Curry	802-8871 Auct	Microsoft	(523) 528-9379	(684) 322-0541	
			- 11 11	Hammett Anth	Hammett	Anthony	319-4975 Tem	Macromedia	(387) 174-8677	(589) 504-1786	
				Lance Hoover	Lance	Hoover	908-4150 Lobo	Google	(194) 859-5674	(407) 615-5624	
				Patricia Wright	Patricia	Wright	2181 Pharetra	Microsoft	(230) 706-3828	(707) 860-8198	
Available		BLOCK DO		Magee Cline	Magee	Cline	296-8673 Eget	Lycos	(979) 270-4915	(917) 102-0128	
		NOT BOOK		Anhrodite Keller	Anhrodite	Keller	7146 Mauris Rd	Cakewalk	(136) 955-8219	(794) 742-7717	
1		Following up on customers,	Cal	×							
		customers,		Alex Johnson	<u>^</u>						

Once you make a search the results will open in a separate **Search Results Panel**. Here you can view the results in list form and simply clicking any entry will reveal and highlight it in the calendar above. When you're done with your search, you can close the search panel by clicking the X -icon in the right top corner of the panel. By clicking the funel -icon you can also filter whether you want to see **All Appointments, Past Appointments** of **Future Appointments**.



1 00 2 Meetin	g (Jerry Snyder) - [Meeti	Ing Koomj				
Search Results - Eliz		-		→ H4 44	4 > >> >> -	-
	End Time	Subject	Employee/Resource	Location	Label	#
1/17/2017 6:00 PM	1/17/2017 7:30 PM	Initial Consultation	Brian Anderson		(None)	
1/3/2019 8:00 AM	1/3/2019 9:30 AM	Pre-Op Checkup	Brian Anderson	Eximantion Roo	Confirmed	
1/5/2019 10:00 AM	1/5/2019 2:00 PM	Operation	Brian Anderson	Operating Room 1	Rescheduled	
1/12/2019 8:30 AM	1/12/2019 10:00 AM	Post-Op Checkup	Brian Anderson	Examination Ro	Confirmed	
1/15/2019 9:30 AM	1/15/2019 11:00 AM	Post-Op Checkup	Brian Anderson	Examination Ro	Must Attend	
5/28/2019 12:00 AM	5/30/2019 12:00 AM	test1	Brian Anderson		(None)	
2/6/2020 7:30 AM	2/6/2020 8:00 AM	Test	Brian Anderson	Main Office	(None)	
	of 41 + ++ +					

Under the **View** -tab you have the option to show or hide the panels in the interface as well as the option to **Restore Default Layout**. You can also change the overall look by selecting different skins.

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30 800 30 900 900 NOT BOOK - DO NOT BOOK - [Meeting Room] 1000 Advertising Agency - Meeting Room] 30 Meeting Room] 30 Decision for new	aining Izabeth antosh) - leeting Room] all to confirm ly before.	30 800 30 900 30 900 30 1000 30 30 1000 30 30	Manager Session - [Location A] Please bring Call to
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Brian Anderson	Conrad Brissels	Brian Anders	on Conrad Brissels
Wed, May 27 Thu, May 28 Friday, May 29	Wed, May 27 Thu, May 28	Wed, May 27 Thu, May 28	B Friday, May 29 Wed, May 27 Thu, May 28
30		30	
		8 00	
9 00 BLOCK DO	Training	9 00 BLOCK DO	Training
Meeting with Advertising Agency - Moeting (Meeting Room] Manager Session - [Location A]	(Elizabeth Mcintosh) - Available [Meeting Room]	30 Meeting with Advertising Agency -	(Elizabeth

A

If you accidentally close and loose a panel you can always restart ScheduFlow to restore everything back to the default layout.

MANAGING RESOURCES

Create calendars for employees or other Resources

In ScheduFlow, each calendar is connected to a Resource. The Calendars -panel shows you the Resources that you have added to your system.

A Resource can represent whatever you like it to - a person, a place or a thing like a a meeting room or a vehicle. If a Resource is checked, it will be displayed in the calendar.

A

Resources that aren't checked might have entries but they will not show in the calendar until you tick their check-box.

		Date Navigator 🗆 🕮 🛪
Denisse Kim		
Thursday, May 28	Friday, May 29	S M T W T F S 18 26 27 28 29 30 1 2 19 3 4 5 6 7 8 9 20 10 11 12 13 14 15 16 21 71 18 120 12 23 22 24 22 23 30 23 31 1 2 3 4 5 6 Today
BLOCK DO NOT BOOK	BLOCK DO NOT BOOK Following up on customers.	
		Calendars Calendars Alex Johnson Sinan Anderson Conrad Brissels Conrad Brissels Denisse Kim
	Meeting (Ora Kerr) - [Meeting Room]	 John the Trucker Kelly Carlson Melincia Maynard
Training (Josiah Clements)		Melissa Hess Mika Davis Reed Massey
	Training (Josiah Clements)	Labels
		(None)
		Confirmed

To manage Resources in ScheduFlow, click Resources under the Administrator -tab. Here you can create, modify or delete the Resources.



1

Add, delete or search for **Resources**. Once you are done with your changes, click **Save**. You can also change the Grid View between **Vertical** and **Table View**. 2

A **Display Name** is required and should describe the Resource. It will also show in the **Calendars** -panel and on reports. If it's a person, their first and last name can be entered in the rows below.



3

The **Custom** rows at the bottom can be used to enter additional information to your liking. For example a license plate number of a car.

MANAGING CLIENTS

Adding, deleting, importing and exporting Clients

To manage your Clients in ScheduFlow, click **Clients...** under the **File** -tab. Here you can create, modify, delete or search for Clients in your system.

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		-	°o U	lser Login			New Recurri Appointment	ng Appointment		Add Client		Print Appointment	Exit		
Accour Login		fresh ata	° B 6	ogout	New A	ppointment		tment Template	Clients	🗟 Refresh Clients	Print Schedules	Print Calendar	Exit		
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2

1

Add, delete, search or print **Client** information. Once you are done with your changes, click **Save**. You can also change the Grid View between **Vertical** and **Table View**. Fill in the Client's information details. A **Display Name** is required and the rest of the fields are optional. Checking the **Inactive** -box will hide the Client in the calendar.

-	nage Records Add Client O Delete Clie		Search for Client	▼ 💽 Vert	ical Grid View 🔻	@ Help	Close	
Save	Print Selec	ted Client						
_	File		Search		View	Help	Close	
(- F	Required Informatio	DIN						
	ID		209 210	211	212	213	214	•
	Display Name	Sandra Cannon	Elizabeth Mcintosh	Josiah Clements	Graiden Brewer	George Duran	Logan Frederick	Hiroko Lindsay
- (Client Information							
	First Name	Sandra	Elizabeth	Josiah	Graiden	George	Logan	Hiroko
	Last Name	Cannon	Mcintosh	Clements	Brewer	Duran	Frederick	Lindsay
	Company	Yahoo	(ahoo	Chami	Finale	Cakewalk	Sibelius	Macromedia
	Inactive							
	Birthday	12/15/2007 12:	0 7/24/2008 12:00	7/7/2007 12:00:	12/30/2007 12:0	4/11/2007 12:00	11/3/2007 12:00	3/8/2008 12:00
- F	Address Informatio	n						
	Address	Ap #868-4349	In 762-1791 Elit, Av	2336 Ut St.	862-2448 Suspe	2241 Cursus Av.	139-9544 Cum Rd.	Ap #412-5638
	Address 2	4K	30	1S	7E	0P	9A	1V
	City	Buena Park	Guayanilla	Lancaster	Racine	Fresno	South Portland	Monongahela
	State	Mississippi	ND	SC	FL	Indiana	IL	PA
	Zip Code	46639	56684	86215	20809	13723	41956	74356
	Location							
- 0	Contact Information	n						
	Home Phone	(258) 263-6231	(909) 262-9732	(405) 249-5506	(946) 825-8216	(847) 614-0420	(293) 325-1831	(283) 130-9730
	Work Phone	(686) 332-4864	(381) 250-8364	(167) 949-3492	(328) 647-3441	(666) 792-7340	(681) 315-9815	(808) 480-0758
	Mobile Phone	(733) 591-1031	(671) 194-3372	(239) 483-1164	(458) 603-1341	(167) 139-7793	(907) 919-7347	(606) 901-390
	Main Phone	(686) 332-4864	(381) 250-8364	(167) 949-3492	(328) 647-3441	(666) 792-7340	(681) 315-9815	(808) 480-0758
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40								

3

The **Custom** rows at the bottom can be used to enter additional information to your liking. For example a patient- or customer number.

Clients 🔤				
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👻 Requir	ed Information			
ID		209	210	211
	play Name S	andra Cannon	Elizabeth Mcintosh	Josiah Clements

Clicking the **Export** -tab will let you export a list of your Clients to a **CSV**, **TAB** or **PIPE** -file.

You can also import Clients by clicking **Import Data...** under the **Administrator** -tab. You can import **CSV**, **TAB** or **TXT** files. Note that you can also use the import -feature to import data for **Resources** and **Appointments**.



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	210	Elizabeth Mcintosh	Elizabeth	Mcintosh	Yahoo	762-1791 Elit, Avenue	3U	Guayanilla	ND	
	211	Josiah Clements	Josiah	Clements	Chami	2336 Ut St.	1S	Lancaster	SC	
	212	Graiden Brewer	Graiden	Brewer	Finale	862-2448 Suspendisse Av.	Æ	Racine	FL	
	213	George Duran	George	Duran	Cakewalk	2241 Cursus Av.	0P	Fresno	Indiana	
	214	Logan Frederick	Logan	Frederick	Sibelius	139-9544 Cum Rd.	9A	South Portl	IL	
	215	Hiroko Lindsay	Hiroko	Lindsay	Macromedia	Ap #412-5638 Risus. St.	1V	Monongahela	PA	
	216	Gillian Stein	Gillian	Stein	Finale	401-5026 Vitae, Rd.	1M	Bangor	MS	
•	217	Halla Clayton	Halla	Clayton	Yahoo	P.O. Box 453, 3089 Enim. Ave	6B	Westminster	RI	
0	218	Petra Curry	Petra	Curry	Microsoft	802-8871 Auctor Rd.	9M	Reedsport	MS	
11	219	Hammett Anthony	Hammett	Anthony	Macromedia	319-4975 Tempor Ave	8M	Carolina	ID	
12	220	Lance Hoover	Lance	Hoover	Google	908-4150 Lobortis. Avenue	9W	Wheaton	Arizona	
13	221	Patricia Wright	Patricia	Wright	Microsoft	2181 Pharetra. Street	5Y	Liberal	Montana	
14	222	Magee Cline	Magee	Cline	Lycos	296-8673 Eget Rd.	OY	Boulder	TX	
15	223	Aphrodite Keller	Aphrodite	Keller	Cakewalk	7146 Mauris Rd.	0S	Phoenix	MT	
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MANAGING APPOINTMENTS

Add, delete and edit Appointments

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A new **Appointment** can be created in several ways. You can click **New Appointment** under the **File** -tab or you can double click on a date and time of choice in the **Appointment Calendar**. You can also click and drag to select a duration for the Appointment before you create it.

mployee/Resource			Clie	nt Contact Inf	ormation		
Appointment with:				st Name:	Josiah		
Time as:	Busy		- La	st Name:	Clements	_	
			Cc	mpany:	Chami		
ppointment			En	nail:	ultrices.iaculis.odio@	necelei	
Appointment for:	Josiah Clements	▼ 38 (60			Preferred	
Label As:	Confirmed		• w	ork Phone:	(167) 949-3492	0	
Subject:	Workshop		Ho	me Phone:	(405) 249-5506	0	
Location:	Meeting Room A		Mo	bile Phone:	(239) 483-1164	0	
Description: Please bring docu	mente		Ma	ain Phone:	(167) 949-3492	0	
Fieldse bring doet	america		01	her Phone:		0	
			Fa	ix:		0	
			-				
ime information							
Start Time:	5/28/2020 -	06:30 AM 🛟	Reminde	r 0 min	utes 🔻		
End Time:	5/28/2020 🔻	08:00 AM 🗘	🗌 All Day B	Event			
			Recurren	ice O	K Cancel	Help	

(Any)		-
(Any)		
Brian Anderson		
Conrad Brissels		
Denisse Kim		-
		• 🙂
(None)		*
	(Any) Brian Anderson Conrad Brissels Denisse Kim	(Any) Brian Anderson Conrad Brissels Denisse Kim

Pick the Employee or Resource that will administer the Appointment.

A

Note that if you don't assign a Resource to an Appointment it will be created as (Any). Unassigned Appointments will be visible in all users' calendar until a Resource is assigned. This can be done by any user in the system with the appropriate privileges. Under **Time As**, pick the status you wish to display for Brian during this Appointment. The corresponding color will show as a stripe on the edge of the Appointment in the Calendar, in this case orange for **Busy**.

Employee/Resource		
employee/Resource		
Appointment with:	Brian Anderson	
Time as:	Available	
	Available	
Appointment	Tentative	
Appointment for:	Busy	
Appointment for:	Not Available	
Label As:	(None)	



Appointment × Employee/Resource Client Contact Information Appointment with: Brian Anderson + First Name: Time as: Busy Last Name: Chami Company: Email: Appointment for: Josiah Clements - 🎎 🐍 🙆 Preferred Label As: Confirmed Work Phone: Subject: Workshop Home Phone: Location: Meeting Room A Mobile Phone: Description: Main Phone: (167) 949-3492 Please bring documents Other Phone: Fax: Time information ▼ 06:30 AM 1 Start Time: 5/28/2020 Reminder End Time: 5/28/2020 ▼ 08:00 AM \$ All Day Event Recurrence OK Cancel Help Ready

If the Client is in your system their information will automatically show in the **Client Contact Information** to the right.

You can also assign a **Label**, a **Subject** and a **Location** to it, as well as writing a **Description** that can be any additional information related to the Appointment.

Under **Appointment** you can choose to assign the Appointment to a Client and enter further information. To see a list of the Clients in your system click the **black arrow**.



Note that you do *not* have to select a Client when creating an Appointment. If no Client will be joining the Appointment, you can simply leave the field blank.

A

mployee/Resource					Client Contact Info	ormation		
Appointment with:	Brian Anderso	n		•	First Name:	Josiah		
Time as:	Busy			•	Last Name:	Clements		
Appointment					Company:	Chami		
Appointment for:	Josiah Clements		aa 🐍 🤅		Email:	ultrices.iaculis.odio@	necelei	
Label As:	Confirmed		48 <u>69</u> (-			Preferred	1
Subject:				-	Work Phone:	(167) 949-3492	0	
-	Workshop			-11	Home Phone:	(405) 249-5506	0	
Location:	Meeting Room A				Mobile Phone:	(239) 483-1164	0	
Description:				_	Main Phone:	(167) 949-3492	0	
Please bring docu	ments			^	Other Phone:		0	
					Fax:		0	
				-				
Time information								-
Start Time:	5/28/2020	▼ 06:30 AM	\$	Re	minder 0 minu	utes 🔻		
End Time:	5/28/2020	▼ 08:00 AM	\$		Day Event			

inesday, May 27	Thursday,	May 28	Friday, May 29)
	Workshop (Josi - [Meeting Roor Please bring do	m A]		
with Advertising - [Meeting Room] for new ways to our advertising. Get and find out different wased on the length ang run.	BLOCK DO N [Meeting Roon		000 0 6:30:00 AM 8:00:00 AM ase bring documents Josiah Clements (405) 249-5506 167) 949-3492 239) 483-1164	catio ts wit

🔯 📋 📅 7 🛐 🖼 📮 ₹ File Edit View Tools Calendar Reports Admir New Recurring Appointme -luser Login. Appointment Templates Account Refresh 🔓 Logout New Appointment... o New Appointment Template Login... Data Connect Users Schedules Appointment Calendar Brian Anderson Wednesday, May 27 Thursday, May 28 Friday, May 6^{AM} Norkshop (Josiah Clements) · [Meeting Room A] 7 00 Please bring documents 30 8 00 9 00 Manager Session - [l Meeting with Advertising Agency - [Meeting Room] 30 10 00 Looking for new ways to expand our advertising. Get quotes and find out different pricing based on the length of ad being run. Please bring docur BLOCK -- DO NOT BOOK -[Meeting Room] vou 30 11 00 12^{PM} 30

Under Time Information you get an overview of the Start- and End Time of the Appointment.

You also have the choice to set a reminder for the Appointment, as well as the ability to make it an **All Day Event**.

To create the Appointment, click **OK**. To turn it into a Reccuring Event, click **Recurrence** (see p. 21)

Once the Appointment is created, you can hover your mouse cursor over it to reveal further information. Note that the **Time As** -selection for **Busy** is shown as an orange stripe and the **Label As** for **Confirmed** colors the event green.

You can easily edit the Appointment time by clicking and dragging it, or by clicking and dragging on either the top or bottom edge of it. You can drag and drop an Appointment from one Resource to another. You can also copy and paste Appointments.

		Brian Anderson			Conrad Brissels		
	Wednesday, May 27	Thursday, May 28	Friday, May 29	Wednesday, May 27	Thursday, May 28	Friday, May 29	Wednesd
				Workshop (Josiah Clements)	7		
6 ^{AM}				- [Meeting Room A]	-		
30		Workshop (Josiah Clements)		Please bring documents		Workshop (Josiah Clements)	
7 00		- [Meeting Room A] Please bring documents		- 5		- [Meeting Room A] Please bring documents	
30		Thease oning documento			7	ricabe bring documento	
8 00						N	
30		13				43	
9 00				Training (Elizabeth Mcintosh)			
	Meeting with Advertising		Manager Session - [Location	- [Meeting Room] Call to confirm day before.	Available	BLOCK DO NOT BOOK	BLOCK
O 00 -	Agency - [Meeting Room] Looking for new ways to		A] Please bring documents with	can to commit ady beforer			Following

	Conrad Brissels	
Wednesday, May 27	Thursday, May 28	Friday, May 29
		Workshop (Josiah Clements) -
Training (Elizabeth Mcintosh)		
- [Meeting Room] Call to confirm day before.	Available	BLOCK DO NOT BOOK

To open up the Appointment again for editing, simply double click it. If you turn an Appointment into an **All Day Event**, it gets moved up to the top of the Calendar for that day.



	ment time
Start:	6:00:00 AM ♀ End: 8:00:00 AM ♀ Duration: 2 hours ▼
Recurre	nce pattern
🔘 Dai	
🔘 We	ekly Recur every 1 🗘 week(s) on:
O Mor	nthly 🔲 Sunday 🗹 Monday 📄 Tuesday 📝 Wednesday 🔲 Thursday
O Yea	arly Friday Saturday
kange o	frecurrence
	5/25/2020 🔻 💿 No end date
Start:	○ End after: 10
Start:	
Start:	 ○ End by: ○ End by: ○ 6/15/2020 ▼

You can also make a Recurring Appointment by clicking the **New Recurring Appointment** -button, or the Recurrence -button when creating an Appointment.

You can set the **Appointment Time** and duration, the **Recurrence Pattern** and the **Range of the Recurrence**.

For example you can set the Appointment to happen Weekly on Monday, Wednesday and Friday, starting May 25th through June 15th. Reccuring Appointments are marked with a recurrence -icon applied to it in the form of these circle arrows.

		▲ ④ May				
	Monday, May 25	Tuesday, May 26	Wednesday, May 27	Thursday, May 28	Friday, May 29	SMTWTFS
5 AM	Please bring documents		Please bring documents		Please bring documents	19 3 4 5 6 7 8 9 20 10 11 12 13 14 15 16 21 17 18 19 20 21 22 23 22 24 25 26 27 28 29 30 23 11 2 3 4 5 6
3 00						Today
) 00) 00) 00	Marketing Meeting (Sandra Cannon) - [Jadkies' Office - 2nd Floor] Bring marketing idea proposals and brochures collected over the past few weeks.	Meeting with Advertising Agency - [Meeting Room] Looking for new ways to expand our advertising. Get quotes and find out different pricing based on the length of ad being run.	Meeting with Advertising Agency - [Meeting Room] Looking for new ways to expand our advertising, Get quotes and find out different pricing based on the lenger run.	BLOCK DO NOT BOOK - [Meeting Room]	Manager Session - [Location A] Please bring documents with you.	Calendars Alex Johnson Conrad Brissels Denisse Kim

Open Rec	curring Item
8	Do you want to edit all occurrences of the recurring appointment "Workshop", or just this one?
	edit this occurrence.
	◯ Edit the series.
	OK

When you click to edit a Recurring Appointment you will get the option to either **Edit the Series** or this **Specific Occurence**.

If you choose to edit the specific recurrence, the Appointment will "break free" from the series, which will be indicated with a line through the recurrence -icon. Any changes to the Appointment will then only affect the chosen instance of it.

shop (Josiah Clements) - ing Room A] e bring documents		Me	eting	0 (Josiah Clements) - Room A] ing documents	Workshop (Josiah Clements) - [Meeting Room A] Please bring documents	
			<u>الم</u>	Open Print Appointment Cut		
g Meeting (Sandra - [Jackies' Office - 2nd rketing idea proposals	Meeting with Advertising Agency - [Meeting Room] Looking for new ways to expand our advertising. Get quotes and	Meetin - [Mee	1 1 1 1	Paste Copy Edit Series		Manager Session - [Location A] Please bring documents with you.
hures collected over the weeks.	find out different pricing based on the length of ad being run.	Looking our ad find ou on the			NOT BOOK - m]	
			×	Appointment Label As Delete		

If you wish to restore an Appointment to it's original series-form, simply right-click it and choose **Restore Default State**.

One of the key features in ScheduFlow is the ability to create **Appointment Templates** to speed up your workflow. You can manage your templates by clicking **Appointment Templates** under the **File** -tab. Here you can add, delete and edit templates. You can also click **New Appointment Template** to directly create a new one.

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Login		' ⁻ E	Logout	New Ap	pointment	💿 New Appoint	ment Template	Clients	🂩 Refresh Clients	Frint Schedules	🎲 Print Calendar			
C	onnect		Users			Schedules			Clients		Print	Exit		

ма	nage Records								
	🚱 Add Templ	ate	Search for Templ.		cal Grid View 🔻	🙉 Help 📮	Close		
ave	😮 Delete Ten		Search for Templ	🔻 🔯 Verti	cal Grid view +	e Help	Close		
	File		Search		View	Help Cl	ose		
ï	Required Informatio	0							
1	ID	1001	1002	100	3 1004	1005	1006	1009	1012
	Display Name	Marketing Meeting	Initial Consultation	BLOCK DO NO	Training	Meeting with Adv	Company Massa	Follow-Up	Available
r D	Detail Information								
	Subject	Marketing Meeting	Initial Consultation	BLOCK DO NO	Training	Meeting with Adv	Company Massa	Follow-Up	Available
	Description	Bring marketing idea proposals and brochures collected over the past few weeks.	Gather customer requirements and set up follow-up appointment. pick up:		Bring material if needed.	Looking or new ways to expand our advertising. Get quotes and find out different pricing schemes based on teh length of time ad is being run.	A 1 hour therapeutic massage offers you a chance to have one of only allows your therapist enough time to work one specific area	Level 1	Bring material.
	Duration (min)	150	180	12	0 120	180	60	120	60
	Label	Confirmed	Done	Need Followup	Waiting Room	Could Not Reach	Needs Preparation	(None)	Available
	Status	Busy	Available	Not Available	Busy	Not Available	Available	Available	Available

You can easily find and use them by clicking the **Template** -tab to the right.

III)-					serve ScheduFlo					ate ilavigator					×
	File	Edit View	Tools	Calendar	Reports	Administrator	Help	Licenses	Templa	ite Options			Search By Clien	t 🔻 🗙 🤔	- 💡 •
count	Refresh Data	luser Login	New Appointment				Clients 🍰 Refresh Cl				Print Appointment	🔋 Exit			
Con	nect	Users			Schedules			Clients			Print	Exit			
ppointm	nent Calend	dar									Templates - Drag to (Calendar		÷	×
						Brian	Anderson				Appointment Template Na	ame			Ť
		Monday, May 25		Tuesday	y, May 26	Wednes	day, May 27		Thurs	day, May 28	Marketing Meeting				
											Initial Consultation				
6 ^{AM}	2 Work	kshop (Josiah Clemer eting Room A]	its) -			S Workshop	Josiah Clement	s) -			BLOCK DO NOT BOOK				_
	· · ·	se bring documents					[Meeting Room A] Please bring documents				Training				
7 00	Ficas	se bring documents	Co	mpany Massi	age Hour						Meeting with Advertising Agency				
· -			A	1 hour therap	eutic massage						Company Massage Hour Follow-Up	<u> </u>	2		
8 00				- D				Comp	any Mas	sage Hour	Available	~ *	Þ		- 1
0				45					2		Available				
9 00	Marketir	ng Meeting (Sandra) - [Jackies' Office - 2		eting with Ad Meeting Roor	dvertising Agency										
	Floor]		Loc	oking for new	ways to expand	Meeting with A	dvertising Ager	псу							- 1
0 00	Bring ma	arketing idea proposa chures collected over			. Get quotes and nt pricing based		w ways to expa	ind							
					f ad being run.	our advertising	 Get quotes ar 	nd BLC		NOT BOOK -					
							ent pricing base of ad being run.		eting Ro	om]					

From here you can drag and drop any Template you have created. You can quickly populate your schedule by dragging and dropping multiple Appointment Templates onto your calendar.

MANAGING LABELS

Creating and using Labels to mark and color Appointments



Appointments can be assigned a **Label** to help you organize and find them easier. Each Label has a name and a color.

To change the Label of an Appointment, right-click it, go to **Appointment Label As** and then select your preferred label.

Note that Appointments that haven't been assigned a label will be listed as **(None)** in the **Labels** -panel. To show and hide Appointments based on their labels simply check or uncheck them in the labels panel.

	Ø	1 5	7 31	2	Ŧ		Duoserve ScheduFlow 16								×
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0	0		😽 🥫 Add Resource			🔛 🧟 Manage Users			Labels						
	ninistrator vord…	Resource	ces 🤞	눩 Refresh Re	sources	Add Mobile User	- ∰ M	lanage Groups	🏴 Statu	ses	- Inport Data				
Admin	histrator		Multipl	e Calendars			User Se	curity	Calendar O	ptions	Data				

You can also manage and create your own custom labels by clicking **Labels** under the **Administrator** -tab.

lanage Records							
🔒 😯 Add Label	🖘 Sei	arch for Label 🔻	3 Help	Close			
/e 🔇 Delete Label							
File		Search	Help	Close			
Required Information	1						
ID	1	L 2	3	4	5		
Display Name	(None)	Confirmed	Available	Cancelled	Rescheduled	Done	
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Other Information							
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To add a new Label, click **Add Label**, enter a Display Name and assign a color. ScheduFlow comes pre-loaded with several labels that you can choose to use, rename or delete if want to.



Note that you can use **Labels** in ScheduFlow however you like to suit your needs. They don't need to be tied to a specific type of use case or Appointment. .

PRINTING SCHEDULES

Printing and exporting reports and calendars

Clicking **Print Schedules** under the **File** -tab will let you create and print information reports from your calendar.



Report Types

- Appointments List Detail displays a detailed list of Appointments with no grouping. (below)
- Appointments by Resource Detail displays a detailed list of Appointments grouped by Resource. (p. 27)
- Appointments by Client Detail Displays a detailed list of Appointments grouped by Client. (p. 27)
- Appointments List Summary Displays a summary list of Appointments with no grouping. (p. 28)
- Appointments by Resource Summary Displays a summary list of Appointments grouped by Resource. (p. 28)
- Appointments by Clients Summary Displays a summary list of Appointments grouped by Client. (p. 29)

Date Range: 5/27/2020 - 5/30/2020

start Time - End Time	Subject	Description	Resource	Client	Status	Label
Wednesday, May 27, 2020						
6:00:00 AM - 8:00:00 AM	Workshop	Please bring documents	Brian Anderson	Josiah Clements	Busy	Cancelled
9:00:00 AM - 11:30:00 AM	Training	Call to confirm day before.	Conrad Brissels	Elizabeth Mcintosh	Busy	Needs Preparation
9:30:00 AM - 11:30:00 AM	BLOCK DO NOT BOOK	Following up on customers.	Denisse Kim		Not Available	(None)
9:30:00 AM - 12:00:00 PM	Marketing Meeting	Bring marketing idea proposals and brochures collected over the past few weeks.	Reed Massey		Busy	Rescheduled
9:30:00 AM - 12:00:00 PM	Meeting with Advertising Agency	Looking for new ways to expand our advertising. Get quotes and find out different pricing based on the length of ad being run.	Brian Anderson			No Show
10:00:00 AM - 1:30:00 PM	Available		Melincia Maynard			Available
10:00:00 AM - 12:00:00 PM	Training	Bring material if needed.	Kelly Carlson		Busy	Waiting Room
10:30:00 AM - 12:30:00 PM	BLOCK DO NOT BOOK		Melissa Hess		Not Available	Need Followup
11:00:00 AM - 1:00:00 PM	BLOCK DO NOT BOOK		Mika Davis		Not Available	(None)
12:00:00 PM - 1:00:00 PM	Lunch		Conrad Brissels		Not Available	(None)
12:30:00 PM - 3:00:00 PM	Meeting with Advertising Agency	Looking for new ways to expand our advertising. Get quotes and find out different pricing based on the length of ad being run.	Reed Massey			Cancelled
12:30:00 PM - 3:30:00 PM	Follow-Up		Kelly Carlson		Available	Cancelled
1:00:00 PM - 2:00:00 PM	Lunch		Brian Anderson		Not Available	(None)
1:00:00 PM - 4:30:00 PM	Manager Session	Please bring documents with you.	Denisse Kim	John Hardy	Available	Confirmed
1:30:00 PM - 2:30:00 PM	Company Massage Hour	A 1 hour therapeutic massage offers you a chance to have one of only allows your therapist enough time to work one specific area	Mika Davis		Available	Available
2:30:00 PM - 5:00:00 PM	Initial Consultation		Brian Anderson			Confirmed
2:30:00 PM - 5:00:00 PM	Marketing Meeting	Bring marketing idea proposals and brochures collected over the past few weeks.	Melissa Hess		Busy	Confirmed
2:30:00 PM - 4:30:00 PM	Basic Drumming - private class	Level 1	Melincia Maynard		Available	Not Available
2:30:00 PM - 5:00:00 PM	Meeting with Advertising Agency	Looking for new ways to expand our advertising. Get quotes and find out different pricing based on the length of ad being run.	Conrad Brissels			Cancelled
3:30:00 PM - 4:30:00 PM	Available	Bring material.	Reed Massey		Available	Available

Appointment List - Detail

Appointments by Resource - Detail

Tuesday, June 16, 2020

Resource:	Brian A	Anderson						
ID: First Name: Last Name: Date Hired: Notes:	12		Work Ph Home P Mobile F	Address: Work Phone: Home Phone: Mobile Phone: Email Address:				
Start Time - End T	ime	Subject	Description	Location	Client Name	Preferred Phone		
Wednesday, May 2	27, 2020							
6:00:00 AM - 8:00:0	00 AM	Workshop	Please bring documents	Meeting Room A	Josiah Clements			
9:30:00 AM - 12:00	:00 PM	Meeting with Advertising Agency	Looking for new ways to expand our advertising. Get quotes and find out different pricing based on the length of ad being run.	Meeting Room				
1:00:00 PM - 2:00:0	00 PM	Lunch						
2:30:00 PM - 5:00:0	00 PM	Initial Consultation		Meeting Room				
Thursday, May 28,	, 2020							
10:30:00 AM - 12:0	0:00 PM	BLOCK DO NOT BOOK		Meeting Room				
1:00:00 PM - 2:00:0	00 PM	Lunch						
2:30:00 PM - 4:00:0	00 PM	Meeting		Meeting Room	Ora Kerr			
Friday, May 29, 20	20							
9:30:00 AM - 12:30	:00 PM	Manager Session	Please bring documents with you.	Location A				
1:00:00 PM - 2:00:0	00 PM	Lunch						
2:30:00 PM - 5:00:0	00 PM	Training						

Tuesday, June 16, 2	:020						
Client: Joh	n Hardy						
First Name: Last Name: Company: Address: City/State/Zip: Location:	John Hardy Adobe 640-1009 Nunc Hannibal	Road	4E Virginia	23683	Work Phone: Main Phone: Mobile Phone: Home Phone: Fax: Email:	(130) 126-7698 (130) 126-7698 (263) 673-2842 (176) 570-9023 libero.Morbi.accumsani	@penatibus.com
Start Time - End Time		Subject		Description		Location	Resource Name
Wednesday, May 27, 2	2020						
1:00:00 PM - 4:30:00 P	м	Manager Session		Please bring docur	nents with you.	Location A	Denisse Kim
Thursday, May 28, 202	20						
10:30:00 AM - 2:00:00 I	РМ	Manager Session		Please bring docur	nents with you.	Location A	Reed Massey
1:30:00 PM - 4:30:00 P	М	Check-up Appoin	tment	Please bring docur	nents with you.	Location A	Mika Davis
Friday, May 29, 2020							
11:00:00 AM - 2:30:00 I	РМ	Manager Session		Please bring docur	ments with you.	Location A	Mika Davis

Date Range: 5/27/2020 - 5/30/2020

Start Time - End Time	Subject	Location	Resource	Client Name	Preferred Phone
Wednesday, May 27, 2020	-				-
6:00:00 AM - 8:00:00 AM	Workshop	Meeting Room A	Brian Anderson	Josiah Clements	
9:00:00 AM - 11:30:00 AM	Training	Meeting Room	Conrad Brissels	Elizabeth Mcintosh	
9:30:00 AM - 11:30:00 AM	BLOCK DO NOT BOOK	5	Denisse Kim		
9:30:00 AM - 12:00:00 PM	Marketing Meeting		Reed Massey		
9:30:00 AM - 12:00:00 PM	Meeting with Advertising Agency	Meeting Room	Brian Anderson		
10:00:00 AM - 1:30:00 PM	Available		Melincia Maynard		
10:00:00 AM - 12:00:00 PM	Training		Kelly Carlson		
10:30:00 AM - 12:30:00 PM	BLOCK DO NOT BOOK		Melissa Hess		
11:00:00 AM - 1:00:00 PM	BLOCK DO NOT BOOK		Mika Davis		
12:00:00 PM - 1:00:00 PM	Lunch		Conrad Brissels		
12:30:00 PM - 3:00:00 PM	Meeting with Advertising Agency	Meeting Room	Reed Massey		
12:30:00 PM - 3:30:00 PM	Follow-Up		Kelly Carlson		
1:00:00 PM - 2:00:00 PM	Lunch		Brian Anderson		
1:00:00 PM - 4:30:00 PM	Manager Session	Location A	Denisse Kim	John Hardy	
1:30:00 PM - 2:30:00 PM	Company Massage Hour		Mika Davis		
2:30:00 PM - 5:00:00 PM	Initial Consultation	Meeting Room	Brian Anderson		
2:30:00 PM - 5:00:00 PM	Marketing Meeting		Melissa Hess		
2:30:00 PM - 4:30:00 PM	Basic Drumming - private class		Melincia Maynard		
2:30:00 PM - 5:00:00 PM	Meeting with Advertising Agency	Meeting Room	Conrad Brissels		
3:30:00 PM - 4:30:00 PM	Available		Reed Massey		
Thursday, May 28, 2020					
9:30:00 AM - 11:30:00 AM	BLOCK DO NOT BOOK		Denisse Kim		
9:30:00 AM - 11:30:00 AM	Available		Conrad Brissels		
10:00:00 AM - 1:30:00 PM	Available		Melincia Maynard		
10:30:00 AM - 1:30:00 PM	Meeting with Advertising Agency		Kelly Carlson		
10:30:00 AM - 12:30:00 PM	Follow-Up		Mika Davis	Josiah Clements	
10:30:00 AM - 2:00:00 PM	Manager Session	Location A	Reed Massey	John Hardy	
10:30:00 AM - 12:00:00 PM	BLOCK DO NOT BOOK	Meeting Room	Brian Anderson		
11:30:00 AM - 2:00:00 PM	Meeting with Advertising Agency		Melissa Hess		
12:00:00 PM - 1:00:00 PM	Lunch		Conrad Brissels		
1:00:00 PM - 2:00:00 PM	Lunch		Brian Anderson		

Appointments by Resource - Summary

Date Range: 5/27/2020 - 5/30/2020

Resource: Brian Anderson

Start Time - End Time	Subject	Location	Client Name	Preferred Phone
Wednesday, May 27, 2020				
6:00:00 AM - 8:00:00 AM	Workshop	Meeting Room A	Josiah Clements	
9:30:00 AM - 12:00:00 PM	Meeting with Advertising Agency	Meeting Room		
1:00:00 PM - 2:00:00 PM	Lunch			
2:30:00 PM - 5:00:00 PM	Initial Consultation	Meeting Room		
Thursday, May 28, 2020				
10:30:00 AM - 12:00:00 PM	BLOCK DO NOT BOOK	Meeting Room		
1:00:00 PM - 2:00:00 PM	Lunch			
2:30:00 PM - 4:00:00 PM	Meeting	Meeting Room	Ora Kerr	
Friday, May 29, 2020				
9:30:00 AM - 12:30:00 PM	Manager Session	Location A		
1:00:00 PM - 2:00:00 PM	Lunch			
2:30:00 PM - 5:00:00 PM	Training			

Appointments by Client - Summary Client: John Hardy

Date Range: 5/27/2020 - 5/30/2020

Start Time - End Time	Subject	Description	Location	Resource Name
Wednesday, May 27, 2020				
1:00:00 PM - 4:30:00 PM	Manager Session	Please bring documents with you.	Location A	Denisse Kim
Thursday, May 28, 2020				
10:30:00 AM - 2:00:00 PM	Manager Session	Please bring documents with you.	Location A	Reed Massey
1:30:00 PM - 4:30:00 PM	Check-up Appointment	Please bring documents with you.	Location A	Mika Davis
Friday, May 29, 2020				
11:00:00 AM - 2:30:00 PM	Manager Session	Please bring documents with you.	Location A	Mika Davis

You also have the option to print a visual representation of your calendar by clicking **Print Calendar**.



ormat Pa	iper Resources		
yle name: Da	aily Style		▼ Define Styles
Options			Preview
Start date:	5/27/2020	•	
End date:	5/29/2020	•	
Print from:	12:00:00 AM	÷	
Print to:	12:00:00 AM	‡	Fonts
Duration:	1 day	*	Date headings: 14 pt. Times New Roman ····
🗹 Print all ap			Appointments:
			Shading
			Full Color 🔻 …

Under the **Format** -tab you set the start and end date/time for the shedule. You can also set different settings to define the style of the printed schedule like font and text size.

Page Setup	×
Format Paper Resources	
Paper	Page
Type:	Size:
Letter	Letter A
A4	Letter Half
	Billfold Pocket
	1/2 sheet booklet
	1/4 sheet booklet
	Dimensions:
	Width: 8.50 Height: 11.00
Paper source:	Page orientation
Automatically Select 🔹	
	O Portrait
Margins	O Landscape
Top: 1.00 Left: 1.00	Currascape
Bottom: 1.00 " Right: 1.00 "	
Right 1.00	Apply settings to all styles
Print Preview Print	OK Cancel

Under the **Paper** -tab you can change the format of the paper you wish to print on, like margins and whether it should be printed in portrait or landscape.



Under the **Resources** -tab you can select the Resources that you want to display. To select specific Resources, check **Print using the custom collection**, then select the Resource or Resources you want to print and use the arrows to move them over to the **Resources to print** -column.

When you're done, click **Print Preview** or **Print** to preview or print the calendar.

A visual representation of the selected Resources and Calendar settings will be created.

29] Frida	May 20	020	S M 3 4 10 11 17 18	May 2020 T W T F S 1 2 5 6 7 8 9 12 13 14 15 16 19 20 21 22 23 26 27 28 29 30	S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30
		nderson May 29			onrad Brissels riday, May 29
12 AM					
2:00					
4:00					
6:00					
8:00	9:30 AM-12:30				AM BLOCK DO
10:00	PM Manager Session -			NOT BOOK	
	[Location A]			~	
12 PM	Please bring documents with	2 1:00 PM PM Lun		€ 12:00 PM-1: PM Lunch	- Training (Logan
2:00	2:30 PM-5:00 PM	Training			Frederick)
4:00					
6:00					
8:00					
10 PM					

Under the **Reports** -tab there are several shortcuts to the same print options that were shown above, as well as the possibility to view and print graphs for **Resource Utilization**.



To generate a graph, select your preferred date range, then click and drag to select the information you want to include. You can then **Print Preview** or **Print** the graph.

			Non Port	urring Schedules - R	orourco Utilization	Applyric			_	
			NON REC	Iming Schedules - K	esource ounzation	Analysis				
Print Preview	e Utilization	Show Column	-	t Date 5/16/2020 Date 6/30/2020	 Apply Filter 	Help	[] Close			
File	4	View	4	Filter	4	Help 🔒	Close 🔺			
Year Month	Week									
	Day 🔺									
Resource 🔺	5/16/2020	5/25/2020	5/26/2020	5/27/2020	5/28/2020	5/29/2020	6/3/2020	6/9/2020	6/10/2020	0
					1					
Brian Anderson	1	10	5	7 5	4	Ŧ	3		1	
Conrad Brissels		7					2			
Denisse Kim		1	2				2	1		
Kelly Carlson				2			3			
Ielincia Maynard				1			1	2		1
lelissa Hess				2			2			
Mika Davis				2			1			
Reed Massey				3	2	2	3			
Resource Utiliza	tion Chart			<u></u>	D D					ф. (
			10 10 8 4 4 2 0 May 2	7 77 8	by Reso					rian Anderson conrad Brissels venisse Kim

PREFERENCES

Adjusting settings and default values

Under the **Tools** -tab you will find the **Preferences** panel. Here you have a number of different settings regarding how ScheduFlow behave.





Under the **Client** -tab you can set the default values when creating a new Client. You can decide the default type of Phone number, City, State and Zip Code.



Under the **Appointment** -tab you can set the default values for new Appointments. You can also set to have pop-ups for reminders, including playing a sound when they appear.

🎎 Client		1	Calendar Da	iy	5 Ca	lenda	ar Work Wee	ek 🛛	
7 Calend	ar Week		31 C	alendar Month			🗞 Seard	h	
Appoin	tment		🕎 Ca	alendar			Database		
Calendar 1	ime View Def	ault							
12	Only affects O Day Via Work V Week V Month Timelin	ew Veek /iew View	View	r is initially disp	layed upo	n ope	ning the ap	plication.	
Carousel V	ïew								
-2-	appointme	nt car	ds for the tir	el view as a def me period show Calendar by de	n in the d				ne
	🗌 Enable	Caro	usel View						
Calendar /	Appointment (Group	ing Default						
m	Specifies t	ne typ	pe of groupin	ng applied to th	e appoint	ments	5.		
	Resource	rce	🔘 Date	O None					
		_							

Under the **Calendar** -tab you can set the default values for how to view the calendar.

You can also choose the default values for how to group Calendar Appointments.



Under the **Calendar Day** -tab you can set the default values for how to view the calendar in the **Day View**.

You can set the **Time Scale and Day Count Default**, the **Work Day Hours** to determine the length of a work day and also set how many **Visible Hours** one day should have in the calendar.



Under the **Calendar Work Week** -tab you can set the default values for how to view the calendar in the **Work Week View.**

You can also set the **Time Scale Default**, the **Work Day Hours** to determine the length of a work day and also set how many **Visible Hours** one day should display in the calendar.

Appointment Calendar Database Status Calendar Day Calendar Work Week Calendar Week Calendar Month Search Appointment Display Show start time' specifies whether the start time of appointments should be shown. 'Show end time' specifies whether the start and end time of appointments and character services. 'Show start time Show start time Show start time Show start time Show start time Show end time Show time as dock Show time as dock	Preference	s					-		\times
Calendar Week Sat Calendar Month Search Appointment Display Show start time' specifies whether the start time of appointments should be shown. Show end time' specifies whether the end time of appointments should be shown. Show time as clock' specifies whether the start and end time of appointments are shown using clocks. Show start time Show end time	Appoint	ment		🕎 Calendar			Database		
Appointment Display Show start time' specifies whether the start time of appointments should be shown. Show end time' specifies whether the end time of appointments should be shown. Show time as clock' specifies whether the start and end time of appointments are shown using clocks. Show start time Show end time	🎎 Client		1 Cale	ndar Day 📑 Calenda			ar Work Week		
Show start time' specifies whether the start time of appointments should be shown. Show end time' specifies whether the end time of appointments should be shown. Show time as dock' specifies whether the start and end time of appointments are shown using docks.	7 Calenda	ar Week		31 Calendar Month			🖘 Seard	h	
appointments should be shown. Show end time' specifies Show time as dock' specifies whether the start and end time of appointments are shown using docks. Show start time Show end time	Appointme	nt Display							
	m2	appointmen whether the 'Show time time of app Show s	its should e end time as clock' sp ointments tart time nd time	be shown. 'Show end ti of appointments should becifies whether the sta are shown using docks.	me' speci be show	vn.			
				(Ж		Cancel	H	lelp

Under the **Calendar Week** -tab you can set the default values for how to view the calendar in the **Week View**.

You can set whether you want to show the start time and/or end time for an Appointment. **Show time as clock** specifies whether the start and end time of Appointments are shown using clocks.



Under the **Calendar Month** -tab you can set the default values for how to view the calendar in the **Monthly View**.

Appointment Display will again let you set whether you want to show the start time and/or end time for an Appointment.

Weekend Display will let you compress weekends in your calendar as well as set how many weeks should be displayed in the monthly view.

Preferences							-		×
Appointr	nent		😨 Calenda	ar			Database		
Stent 3		T Cale	ndar Day		📕 Ca	lenda	r Work We	ek	
📅 Calenda	r Week		31 Calenda	ar Month			🖘 Searc	h	
Search By	Client - Max	mum Recu	rring Appoint	ment Days					
	pane will s have no ei	how for re nd date or	ets the limit o curring appoi end after ma r of days set	ntments. ! ny occurre	Since son	ne "Ri	ecurring Ap	pointmen	
	Days Ahea	d Count	100						
					OK		Cancel	H	lelp

Under the **Search** -tab you can set the limit of days ahead that the **Search By Client** result pane will show for **Recurring Appointments.**

Preference	es						-		×
38 Client		1 Caler	ıdar Day		📕 Ca	lenda	r Work Wee	ek	
📅 Calend	lar Week		31 Calend	dar Month			🗞 Searc	h	
Appoir	ntment		🕎 Calend	lar			Database		
Auto Refr	esh Default								
	Auto Refresh allows the application to receive updated data, that may have been data data, that may have been the Server based on the time interval set below.								
	Auto Ref	resh:	180 韋	sec(s)					
		(30	min, 3600	max, 0 for o	disabling	autor	refresh)		
Data Cad	ning Window								
	The data cache window sets the amount of appointment information that is loaded at any particular time. The values indicate the amount of days to load before and after the currently selected date that is chosen in the calendar. The larger the data window, the longer the system will take to refresh data from the server. A shorter window interval may increase performance but will decrease the amount of data shown on mult month calendar view. This caching window also affects the maximum number of days to be exported to outlook. If you are unsure of what numbers to use then keep the default values, as they have been carefully chosen. This setting is usually changed on users' machines who may have a slower connection.								
	Days behind Days ahead		day(s) day(s)						
					ЭК		Cancel	н	ielp

One of the more important Preferences is found under the **Database** -tab.

All changes that you do to your calendar automatically and continuously get saved, so there is no need for you to manually save your changes. ScheduFlow syncs automatically, getting all the changes made on other computers or mobile devices, following the refresh rate that is set in the Database Preferences.

Here you can set how often the database should **Auto Refresh** as well as the **Data Cashing Window** -interval that the application will load into memory when looking at a specific date in the calendar. Keeping these settings at their default is recommended but you may want to change them depending on your specific needs.



To get the latest changes others might have made on other computers or mobile devices since your last auto refresh, you will need to manually click the **Refresh Data** -button here under the **File** -tab



In the main window you can see in the lower right corner when the last refresh was made to the calendar.

SCHEDUFLOW ON MOBILE DEVICES

Create Mobile Users and managing calendars from your mobile device

Once you have set up ScheduFlow to work in Multi-User Mode, you can let users login and use the calendar from a mobile device like a cellphone or a tablet. The ScheduFlow app which loads your ScheduFlow data on mobile devices is available for both Android and iOS.



To access ScheduFlow from a mobile device the user needs a mobile user account. Clicking Add Mobile User under the Administrator -tab lets you set up a new user with mobile access or set up mobile access for an existing user. Note that if you are in Single-User Mode when clicking this button, you will first be prompted to create an admin account and password to enable Multi-User Mode.

Mobile Users Wizard	- 🗆 X	Mobile Users Wizard – 🗆 🗙
م	Welcome to the ScheduFlow Mobile Users Wizard	Configure Mobile User's Options Select whether you would like to set up a new or existing user for mobile access.
Duoserve ScheduFlow™	This wizard will help you setup mobile access for new or existing users. Users will be able to view and edit their schedules remotely from most devices that have Internet access capabilities. Create a new user and set up mobile access Set up mobile access for an existing user	Choose one of the following options: I want to create a new mobile user I want to enable mobile access for an existing user I want to enable mobile access for an existing user
Duoserve, Inc.	< Back Next > Cancel	Duoserve, Inc. Cancel

Click Next.

Note that if you create a new Mobile User, this user will automatically also be added to the regular user database. Select if you want to create a new mobile user or enable mobile acces for an existing user, then click **Next**.

A

🧾 Mobile Users Wizar	d –	- 1		<
Create a mobile user Define the mobile user's			ł	
Required User Fields				
Username:	JasonBrown			
Password:	abd123			
Group:	Full Control 👻			
Default Resource:	Melissa Hess 🔹			
Time Zone:	(GMT-08:00) Pacific Time (US & Canada) 🔹			
	Click 'Next' to complete th	e mobil	e user se	tup
Duoserve, Inc.	< Back Next >		Cancel	

Set a username and password for the user as well as the privileges by selecting an option in the **Group** -dropdown menu. The **Default Resource** is the Resource that the mobile app will display on the main screen after logging in. Set what timezone the mobile user operates in and click **Next**.



When opening the mobile app for the first time you need to sign in with the ScheduFlow account information for your organization.



Next, enter your mobile user account credentials. and tap **Log On**.





Once logged in, the **Default Resource Schedule** that was picked during the mobile user creation process is diplayed at the top. However, you can look at any other Resource by tapping **Other Resources** on the main screen and then choosing another Resource.

The top menu lists shortcuts to **Today's**, **Tomorrow's** and **Yesterday's Schedule**, as well as the option to choose a specific date to view, make a **New Appointment**, add a **New Client** and **Search for Client**(s).

To change the Default Resource Schedule tap **Default Schedule**.

To change the Timezone tap **Default Timezone**.

When you open a schedule, you can go back and forth, one day at a time, by tapping the right or left arrow-buttons at the top.

Tap on an Appointment to view further details about it.

To refresh the information from the server, tap the **Refresh** -button.

At the bottom you have the Main Menu where you can go **Home**, to go back to the main screen, **Today**, which shows you today's schedule, **New Appointment**, which takes you to a window to set up a new Appointment and an option to **Search for Clients**.





Tap on an Appointment to view further details about it. If the Client Details section includes contact information, you can simply tap the phone number to make a call or the email address to send an email.

Scrolling further down will reveal several options. You can edit the Appointment, which will give you the ability to edit the time, duration, etc. You can also Add a New Client to the Appointment, Assign an Existing Client, Delete the Appointment or Edit the Reccurence Pattern.

Any changes made to the calendar in the ScheduFlow app will automatically sync with the server and update the information across all the devices you have ScheduFlow running on.

PURCHASING A SUBSCRIPTION

Managing licenses

On the Licenses -tab, the Purchase Subscription Plan -button will take you to the Duoserve website. If your trial has expired, you will need to purchase a subscription in order to continue using ScheduFlow. Once you purchase a subscription, everything is set up automatically. Your payment will update the license key for your account and you can continue to use the software with all the information entered during your trial.



Clicking the License Manager... -button will show the Admin the current license or licenses that are active. It will also show you whether you are in the trial or subscribed - how many you have used and how many you have left.

	2	5			
Purchase oscription Plan	Help	Close			
Registration	Help ⊿	Close			
License Keys	Registere	d Client Machines	Registered Mobile Use	rs	
License Keys is	ssued with	your subscription	plan		
License	Expi	ration Date	Registration Date	Number Licenses	
License	Expi	ration Date	Registration Date	Number Licenses	
Full Version	3/31	1/2022	7/6/2019	50	
Full Version	3/31	1/2022	7/6/2019	50	

The **Registered Client Machines** -tab shows all the computers that have connected with ScheduFlow and are using a license. If you want to remove a machine from the list, simply select it and click **Unregister Machine**. This will give room for a new machine to connect.

•	F		License k	(ey Mar	nager - ScheduFlo	w 16	_		×
Lic	ense								
		2	5						
Purchase Subscription F	lan	Help	Close						
Registratio	n	Help 🔒	Close		1				
License Ke	eys	Registered	d Client Ma	chines	Registered Mobile	Users			
Client ma	chine	s currently i	registered						
	are i need anyi nece MAI FOR	registered a d to ever re time to utiliz	automátical gister a ma te the avail dient machi	ly after achine m able clie	rchased with your s their first connectio anually. You may u nt licenses you hav placed, reinstalled, 1 34BGS	n is estab Inregister e in your :	lished and the client machin subscription.	ere is no es at	
		RYSURFACE JSZEN-I9	EPRO						
							Unregister	Machine	
expiration d run ScheduF	ate. \ Flow 1	/ou can pur .6. Once yo	chase a sul u have sub	bscriptio scribed	OMPLETE version o n plan for the numb to a subscription pla 16, from the 'Add/R	er of com an you ma .emove Pr	nputers that w ay continue us ograms' menu	vill continue sing Schedi u, and insta	e to uFlow all it
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The **Registered Mobile Users** -tab will show the current users that have been granted mobile access. The amount of users registered can never exceed the amount of mobile licenses that you have purchased. You may clear all users at anytime to be able to utilize the available mobile licenses that you have. This is useful if there are mobile users that are no longer active or their username has changed.

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