



USER GUIDE

Complete guide and tips on using ScheduFlow

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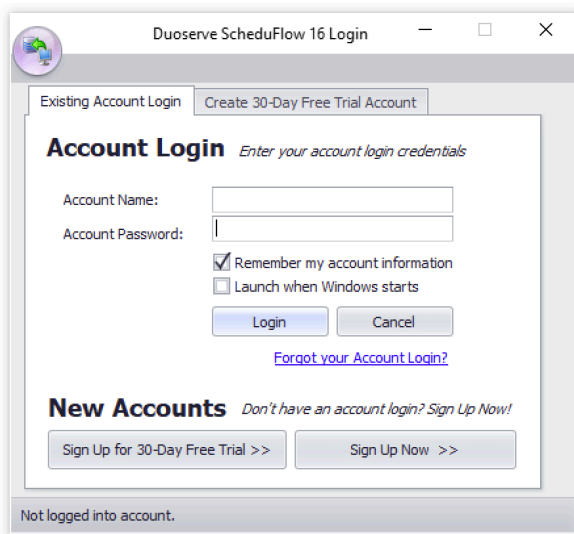
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SETTING UP A TRIAL ACCOUNT

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.

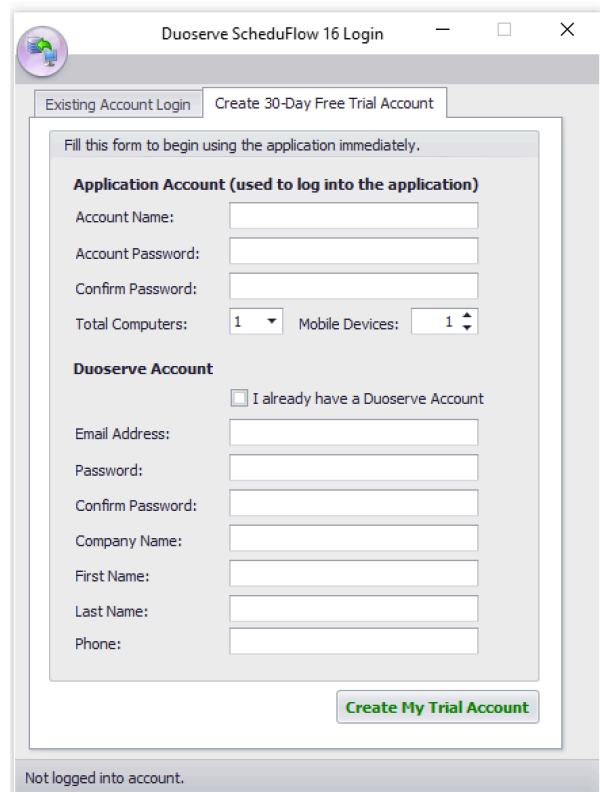
To set up a trial account:

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



The screenshot shows the 'Duoserve ScheduFlow 16 Login' window with the 'Existing Account Login' tab selected. The 'Account Login' section prompts the user to enter their 'Account Name' and 'Account Password'. There are checkboxes for 'Remember my account information' (checked) and 'Launch when Windows starts' (unchecked). Below these are 'Login' and 'Cancel' buttons, and a link for 'Forgot your Account Login?'. The 'New Accounts' section at the bottom offers to 'Sign Up for 30-Day Free Trial >>' or 'Sign Up Now >>'. A status bar at the bottom indicates 'Not logged into 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 transferred to any future subscription plan you might purchase.



The screenshot shows the 'Duoserve ScheduFlow 16 Login' window with the 'Create 30-Day Free Trial Account' tab selected. The form prompts the user to 'Fill this form to begin using the application immediately.' It includes sections for 'Application Account (used to log into the application)' with fields for 'Account Name', 'Account Password', 'Confirm Password', 'Total Computers' (set to 1), and 'Mobile Devices' (set to 1). Below this is the 'Duoserve Account' section with a checkbox 'I already have a Duoserve Account' (unchecked) and fields for 'Email Address', 'Password', 'Confirm Password', 'Company Name', 'First Name', 'Last Name', and 'Phone'. A 'Create My Trial Account' button is at the bottom right. A status bar at the bottom indicates 'Not logged into account.'



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

MANAGING USERS

Creating and managing user accounts

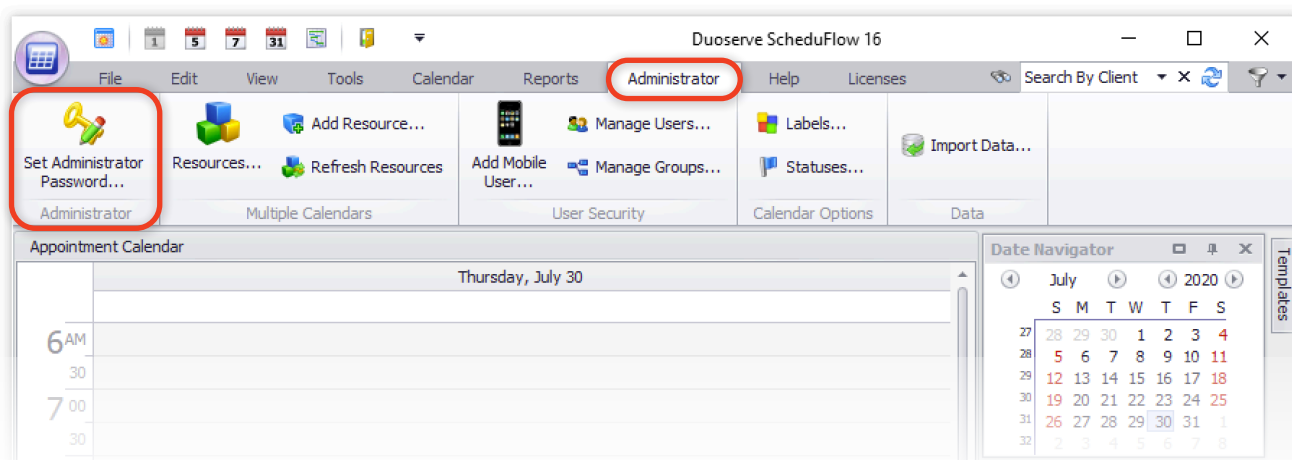
When you log into ScheduFlow using your main account information you are initially in a Single-User Mode. This means that all the information and administrative privileges are accessible.

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

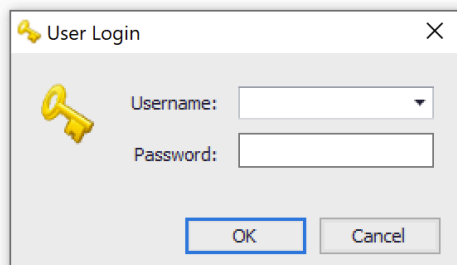
always have full rights to everything in the calendar and Client information.

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.

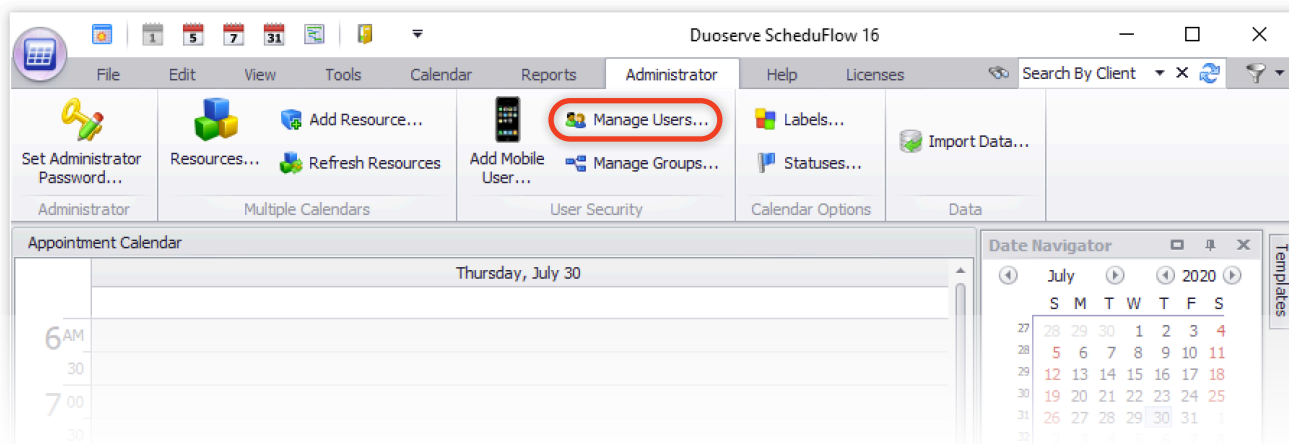
To enable Multi-User Mode click **Set Administrator Password...** under the Administrator -tab. Enter a secure admin password of your choosing and click **Set Password**.



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.

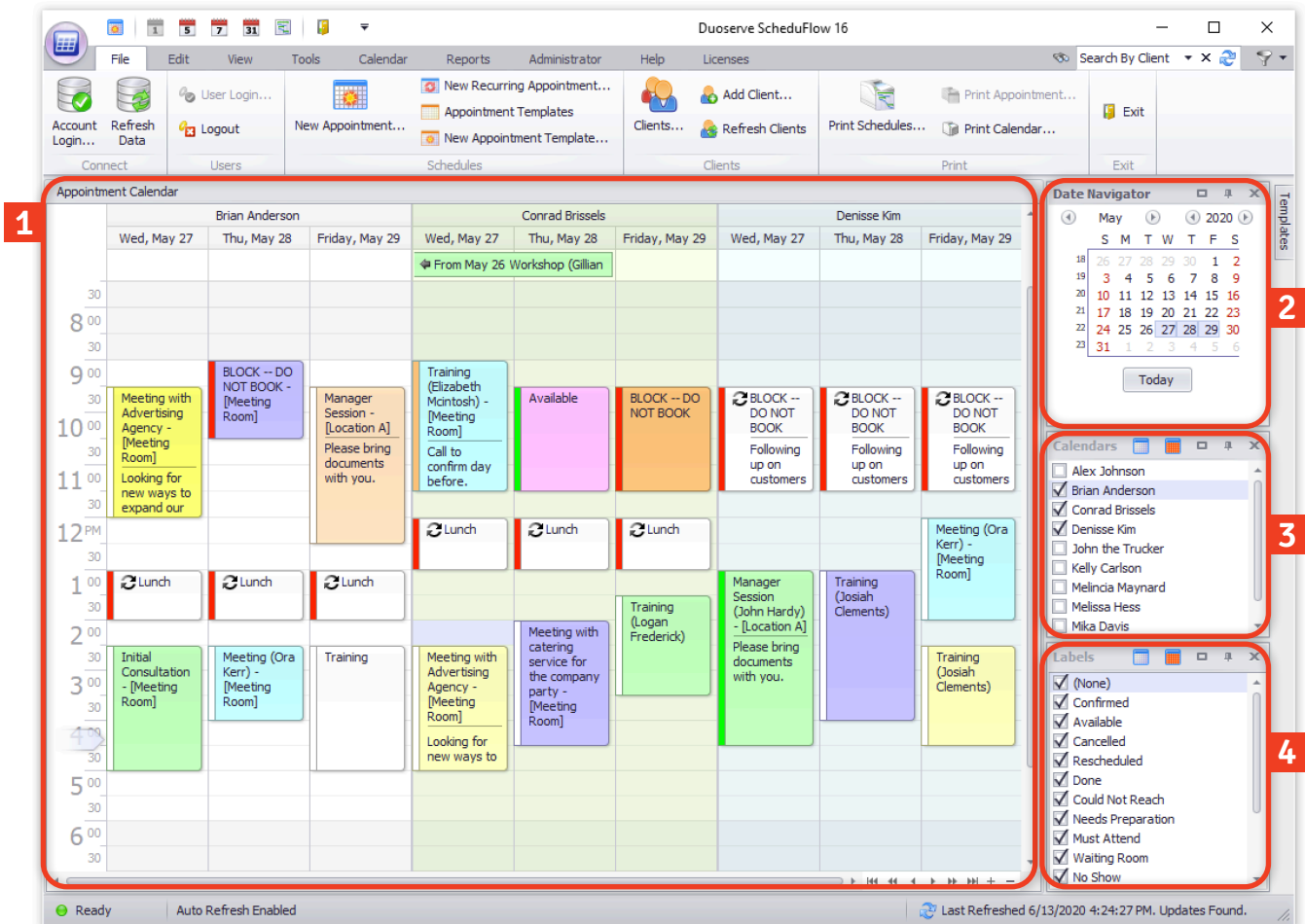
There are default groups which fit most scenarios but you can also create your own groups by clicking **Manage Groups...** under the **Administrator** -tab and create specific rules for accessing your calendar.

Manage Records																	
<div> <div> Add User </div> <div> Search for User </div> <div> Vertical Grid View </div> <div> Help... </div> <div> Close </div> </div>																	
<div> <div> Required </div> <table> <tr> <td>ID</td> <td>1000</td> <td>1001</td> </tr> <tr> <td>Username</td> <td>Default User</td> <td>BillSmith</td> </tr> <tr> <td>Password</td> <td>DefaultUser</td> <td>abc123</td> </tr> <tr> <td>Member of Group</td> <td>Full Control</td> <td>View-Edit</td> </tr> <tr> <td>Time Zone</td> <td>Choose a TimeZone...</td> <td>(GMT+01:00) Amsterdam, Berlin, Bern, R...</td> </tr> </table> </div>			ID	1000	1001	Username	Default User	BillSmith	Password	DefaultUser	abc123	Member of Group	Full Control	View-Edit	Time Zone	Choose a TimeZone...	(GMT+01:00) Amsterdam, Berlin, Bern, R...
ID	1000	1001															
Username	Default User	BillSmith															
Password	DefaultUser	abc123															
Member of Group	Full Control	View-Edit															
Time Zone	Choose a TimeZone...	(GMT+01:00) Amsterdam, Berlin, Bern, R...															
<div> <div> Optional </div> <table> <tr> <td>Default Resource</td> <td>Select a default resource...</td> <td>Select a default resource...</td> </tr> <tr> <td>Inactive</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </table> </div>			Default Resource	Select a default resource...	Select a default resource...	Inactive	<input type="checkbox"/>	<input type="checkbox"/>									
Default Resource	Select a default resource...	Select a default resource...															
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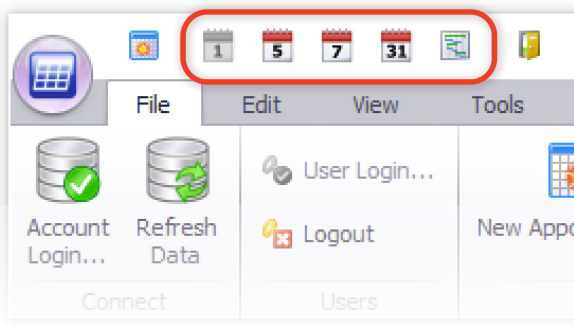
NAVIGATING THE CALENDAR

Understanding Panels, Calendar Views, Searching and more

ScheduFlow has four main panels to help you navigate the application. The **Appointment Calendar**¹, the **Date Navigator**², **Calendars**³ and **Labels**⁴.

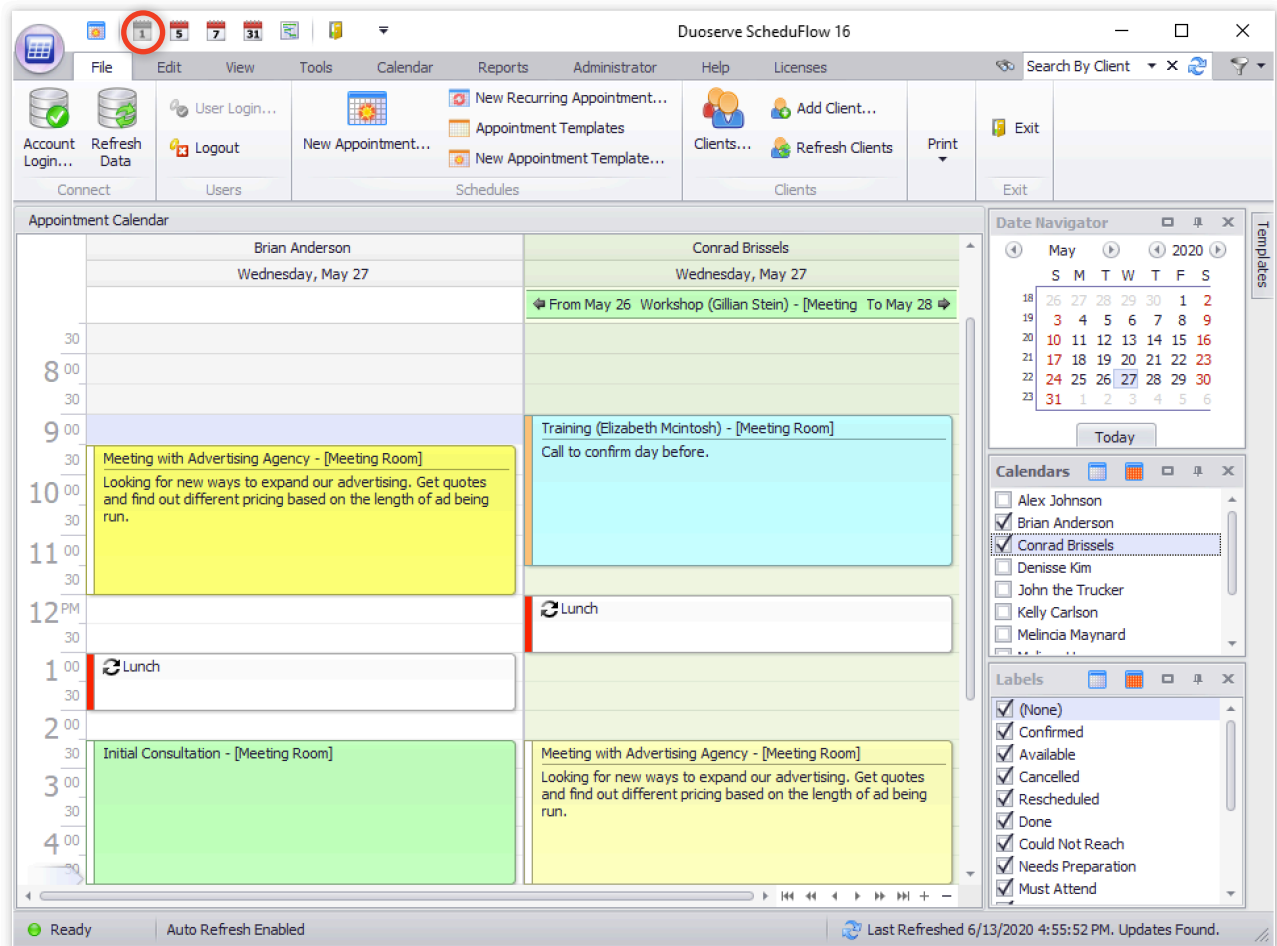


The **Date Navigator** lets you select the date or dates you wish to view in the calendar. You can select a single day, multiple consecutive dates by simply clicking and dragging, or a selection of non-consecutive dates by holding down the CTRL -key on your keyboard and clicking the dates you wish to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

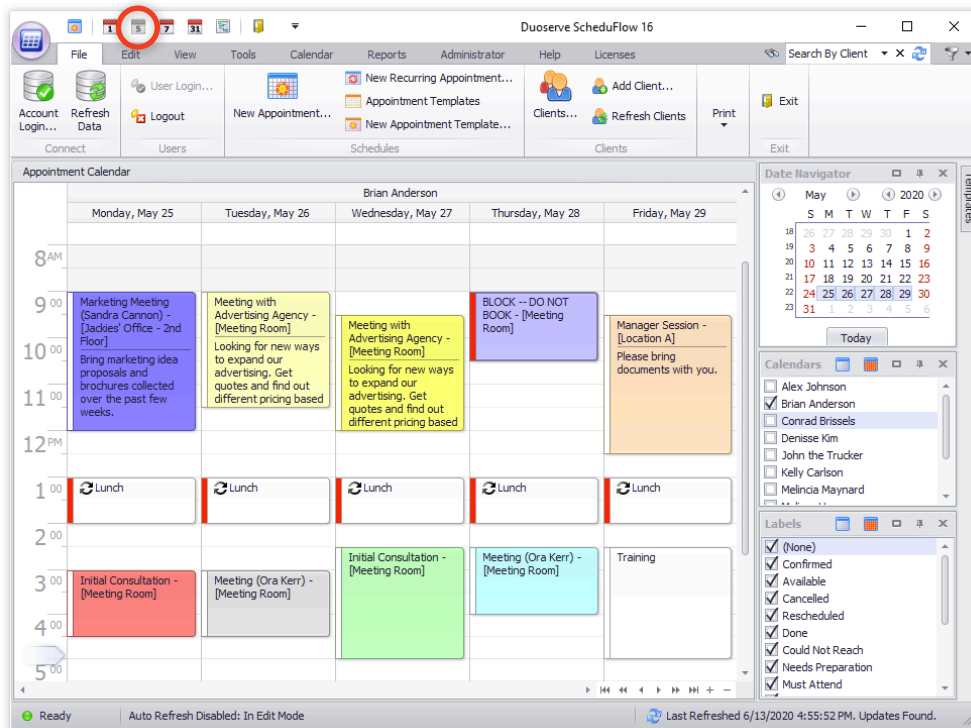


In the top left corner of the application window there are pre-made shortcuts to help you quickly navigate the most common time frames.

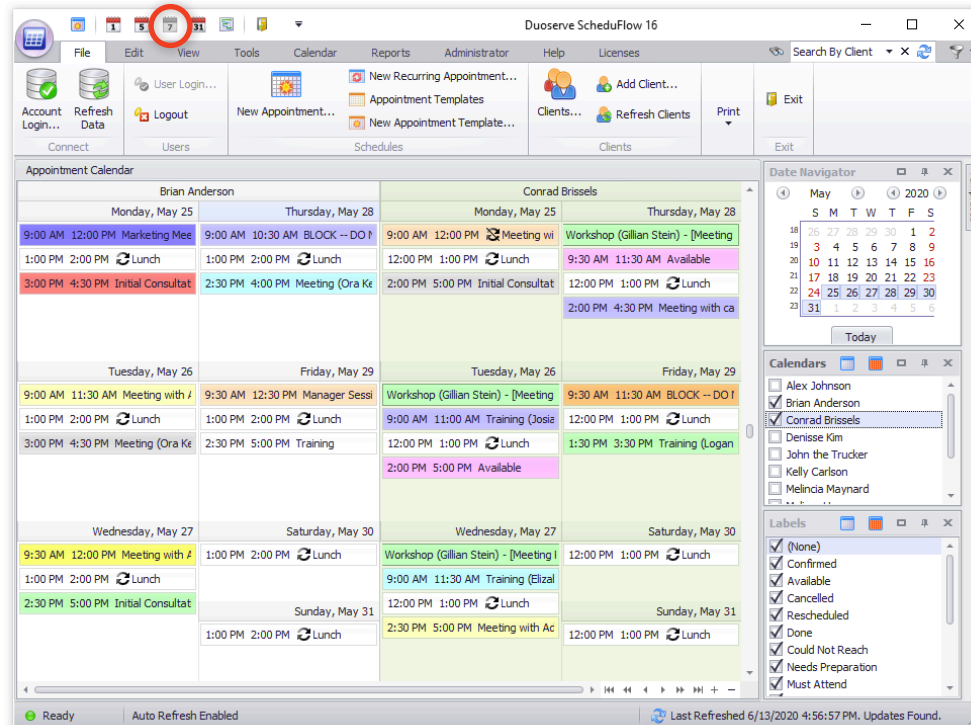
You can set the calendar to a **Day View**, a **Work Week View**, a **Week View**, **Monthly View** and a **Timeline View**, which puts each Resource on a horizontal axis and shows their Appointments in chronological order. Each of the views can display one or multiple Calendars / Resources.



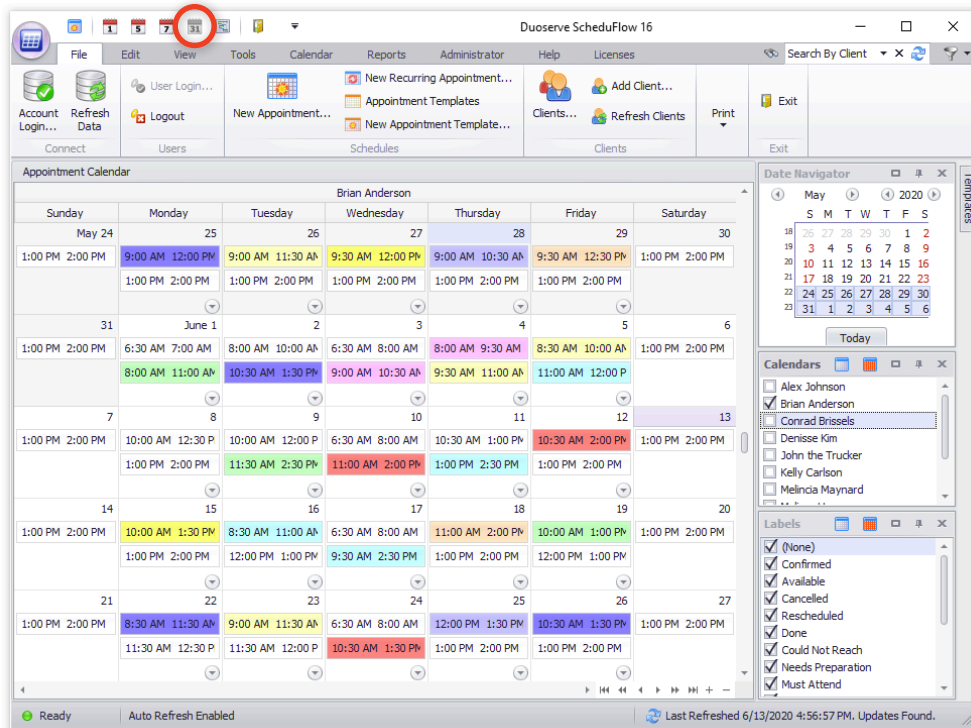
The **Day View** displays a full workday for each Resource. To the left is the **Time Ruler** that shows the time-of-day.



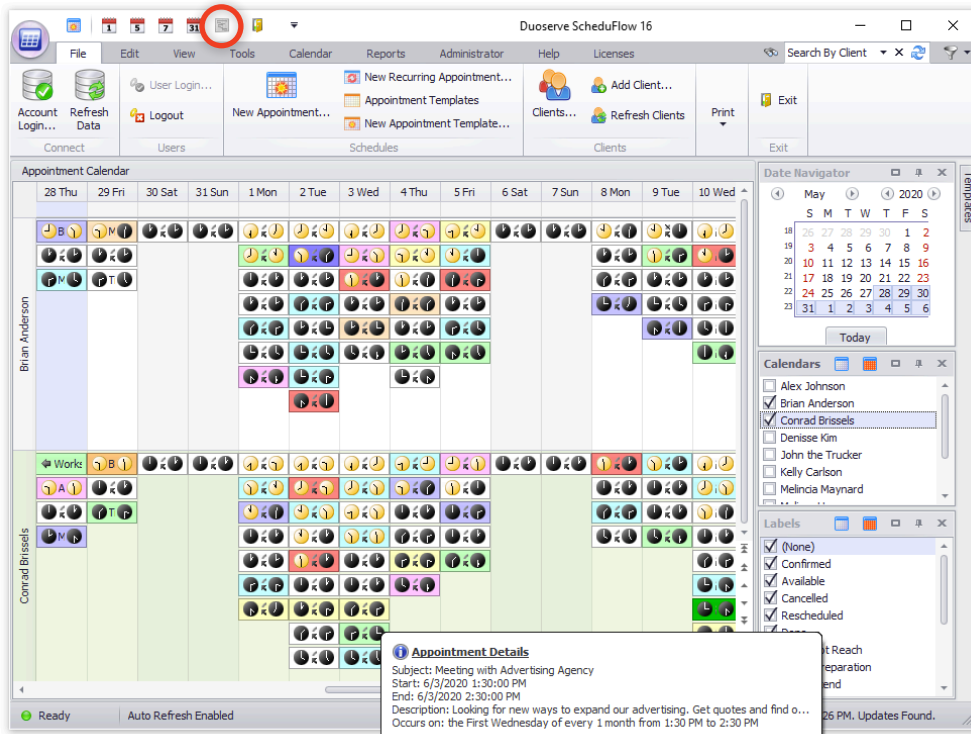
The Work Week View displays a 5-day work week for each Resource.



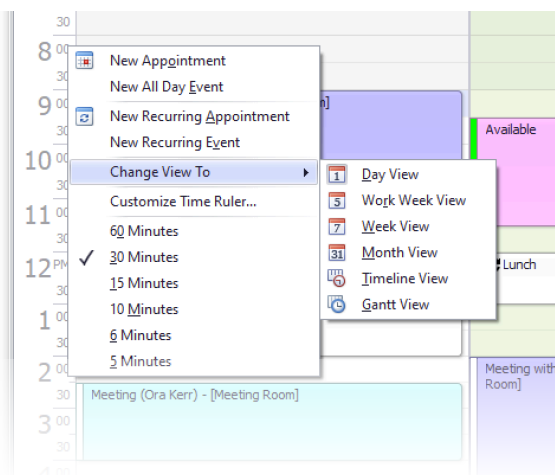
The Week View displays a full 7-day week.



The **Monthly View** displays a full month for each Resource.

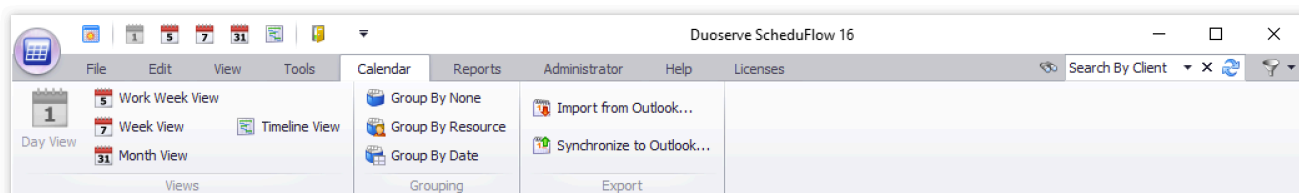


The **Timeline View** displays each Resource on a horizontal axis and shows their Appointments in chronological order. Hovering the mouse cursor over an Appointment gives you more detailed informatio about it.

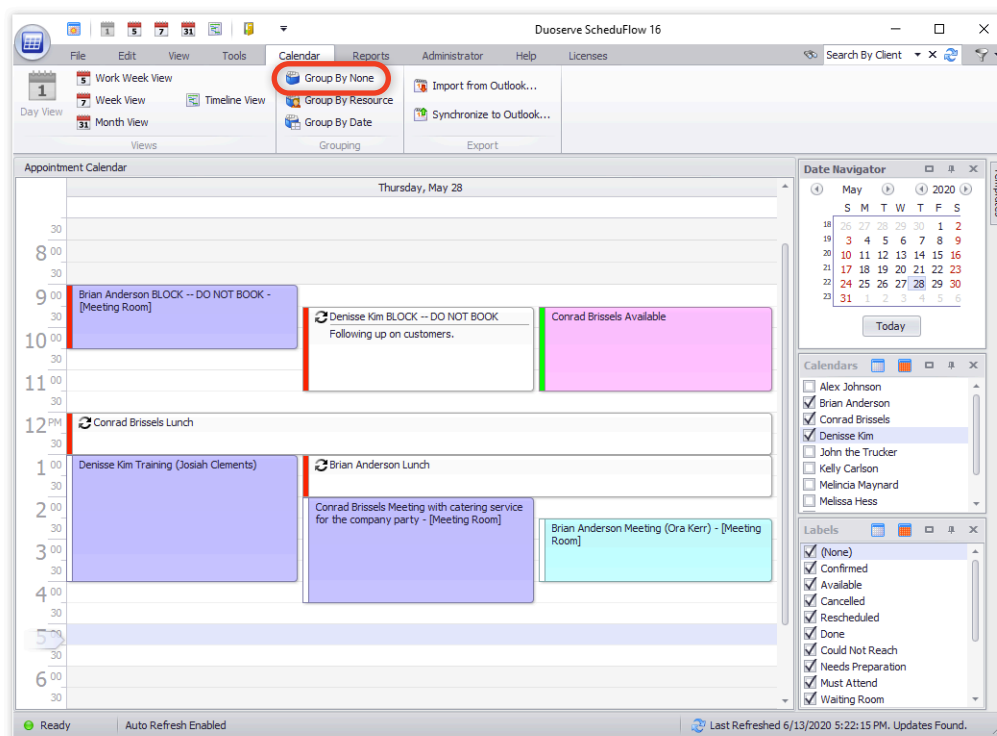


In the **Day View** or **Work Week View** the **Time Ruler** is displayed to the left, showing the time of day.

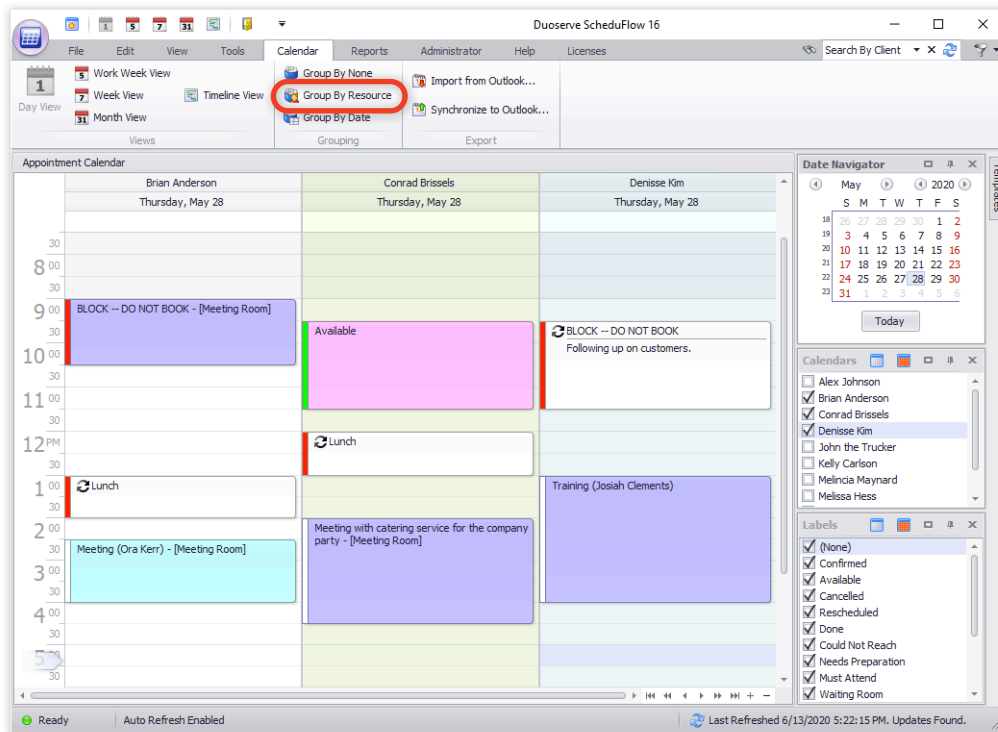
If you right-click anywhere on the **Time Ruler** you'll be able to quickly create new Appointments and change the view format, just like in the shortcuts mentioned above. You can also set the time-interval to be displayed.



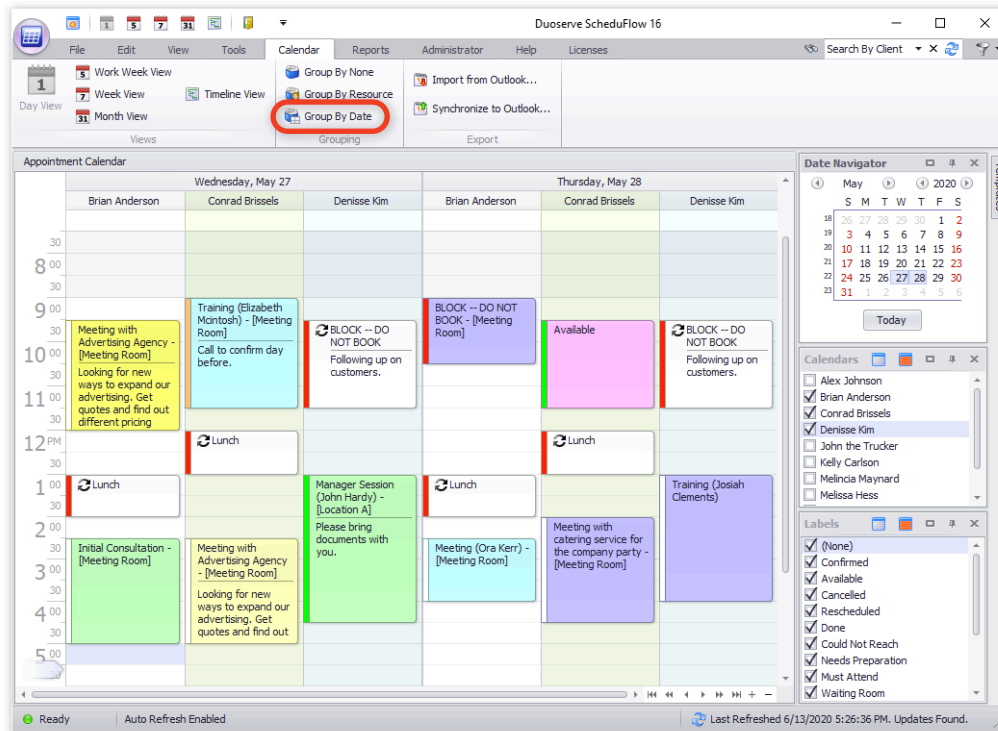
Under the **Calendar** -tab you can control how you want your calendar to display. The **Views** -options are the same as the shortcuts at the top. You can **Group By None** to have it display all the Resources' Appointments for the selected date, **Group By Resource** to group it by according to the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



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

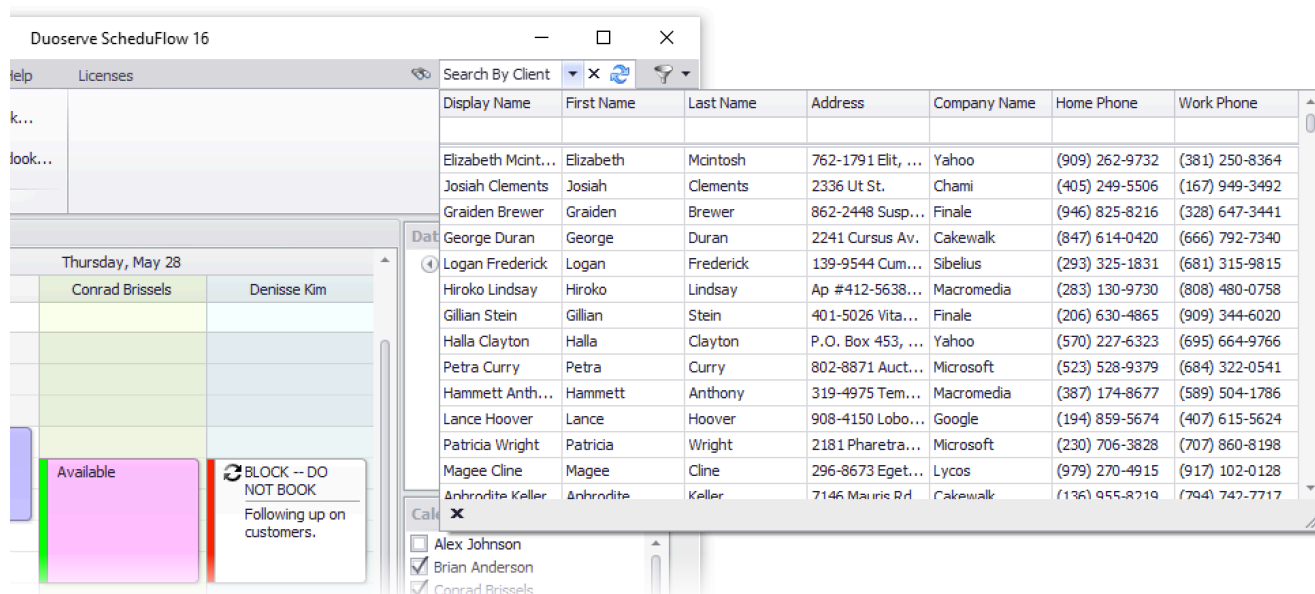


Group By Resource will sort the Appointments into a column under the selected Resource.



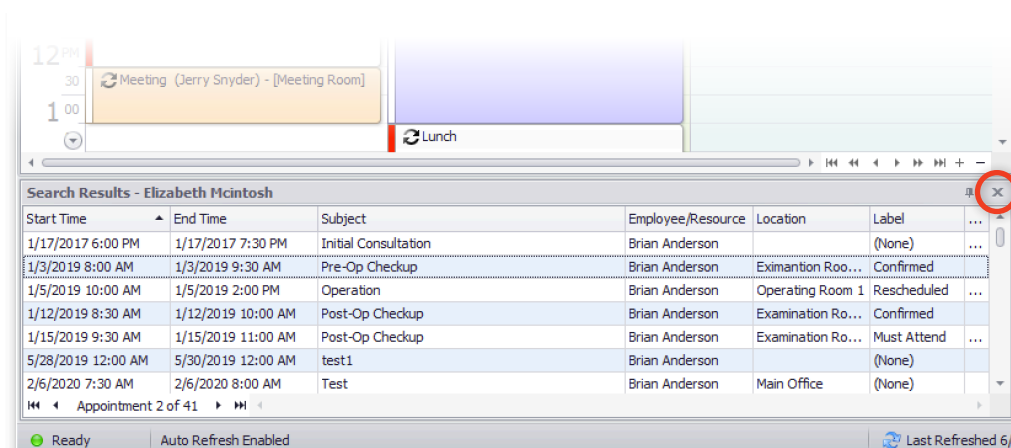
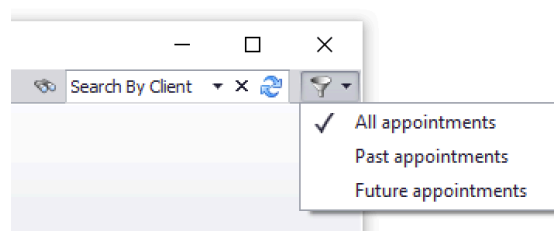
Group By Date will sort the Appointments into columns under the selected dates.

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.

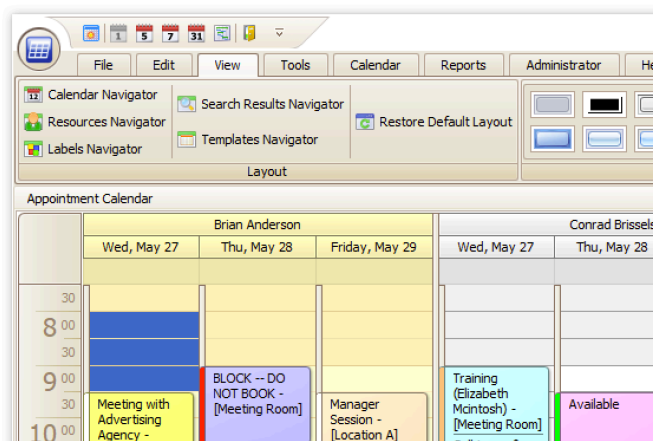
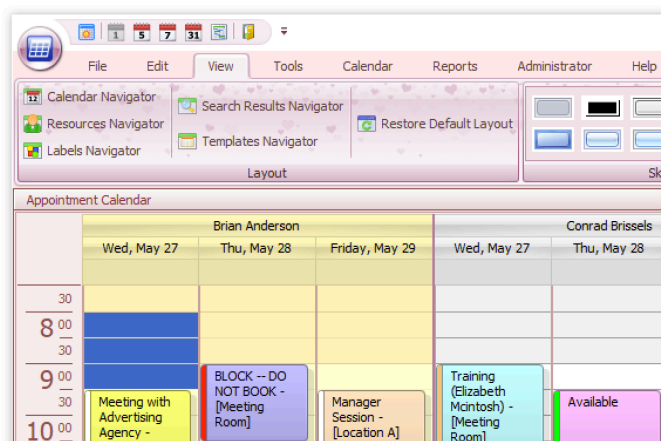
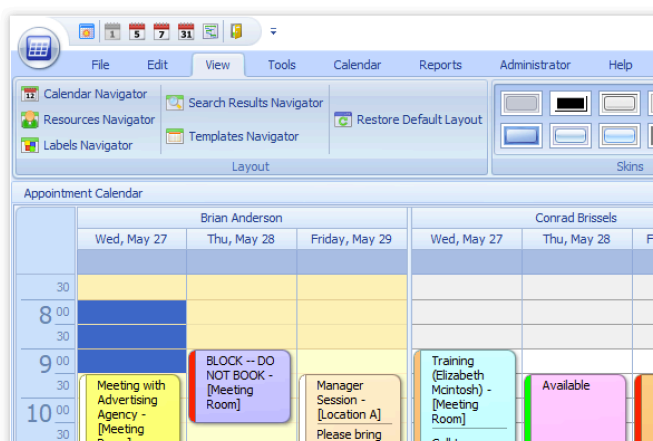
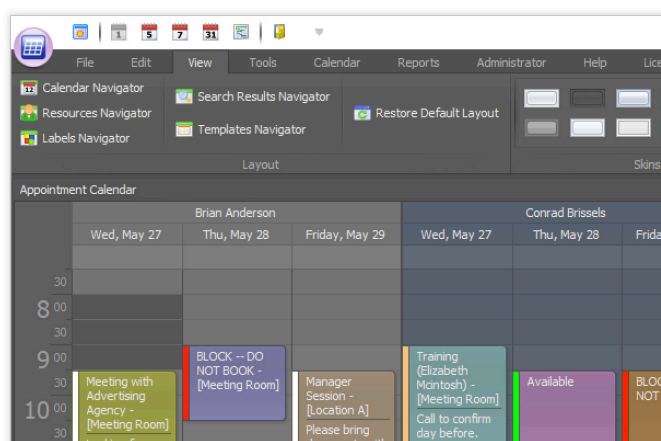
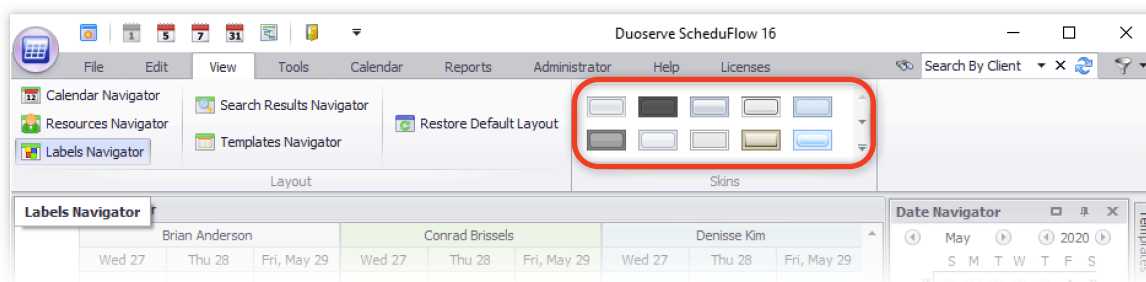


Once you make a search the results will open in a separate **Search Results Panel**. Here you can view the results in list form and simply clicking any entry will reveal and highlight it in the calendar above. When you're done with your search, you can close the search panel by clicking the X -icon in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

By clicking the funnel -icon you can also filter whether you want to see **All Appointments**, **Past Appointments** of **Future Appointments**.



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.



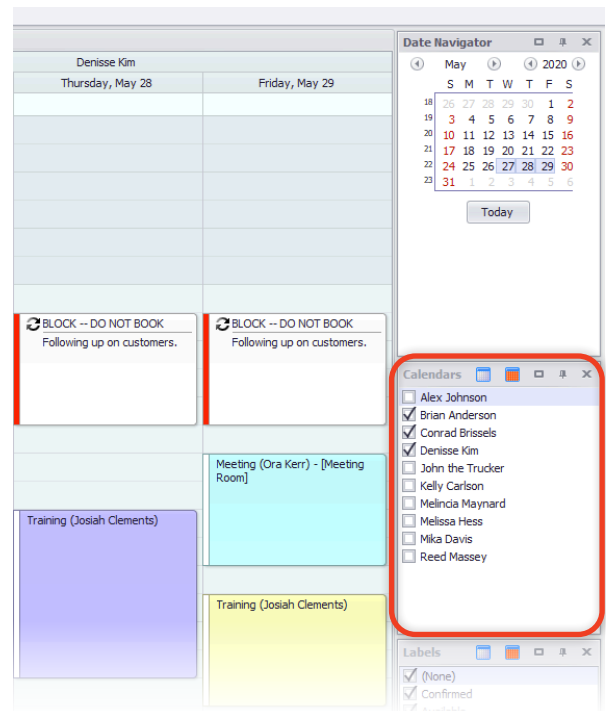
If you accidentally close and loose a panel you can always restart ScheduFlow to restore everything back to the default layout.

MANAGING RESOURCES

Create calendars for employees or other Resources

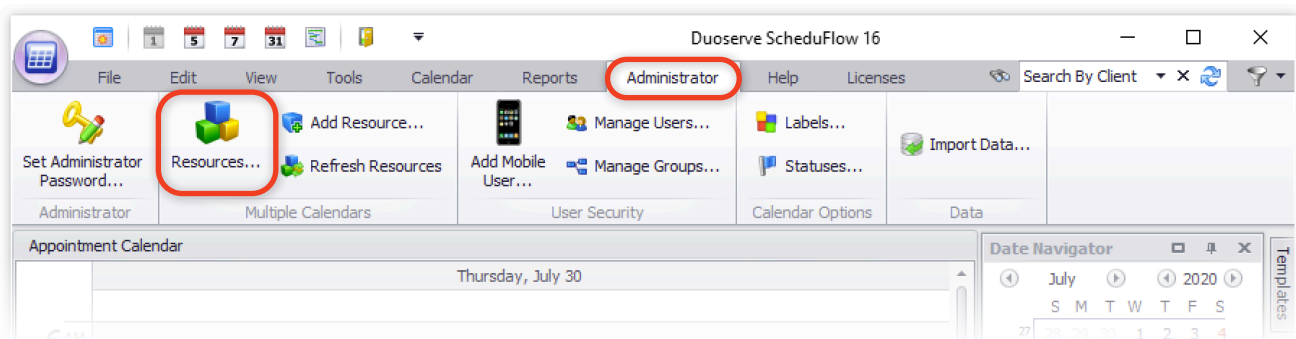
In ScheduFlow, each calendar is connected to a **Resource**. The **Calendars** -panel shows you the Resources that you have added to your system.

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.



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

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.

The screenshot shows the 'Resources' window with a 'Manage Records' tab. A red box labeled '1' highlights the top toolbar containing 'Save', 'Add Resource', 'Delete Resource', 'Search for Resource', 'Vertical Grid View', 'Help...', and 'Close'. Another red box labeled '2' highlights the 'Required Information' section of the first row, which includes 'ID', 'Display Name' (filled with 'Kelly Installer'), 'First Name' (filled with 'Kelly'), and 'Last Name' (filled with 'Clarkson'). A third red box labeled '3' highlights the 'Other Information' section at the bottom of the grid, specifically the 'Custom 1', 'Custom 2', and 'Custom 3' rows. The grid has columns for various resources, with some labeled as 'Truck #1' and 'Truck #2'.

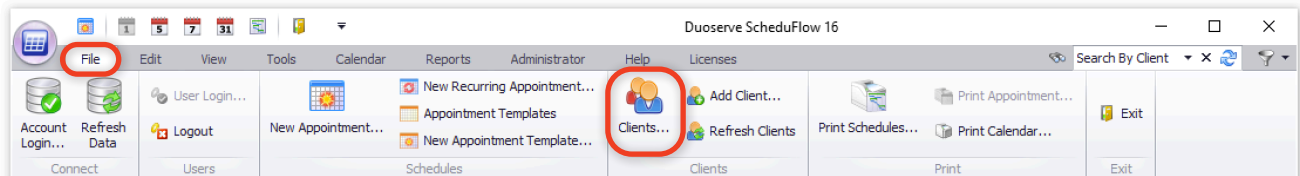
3

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.

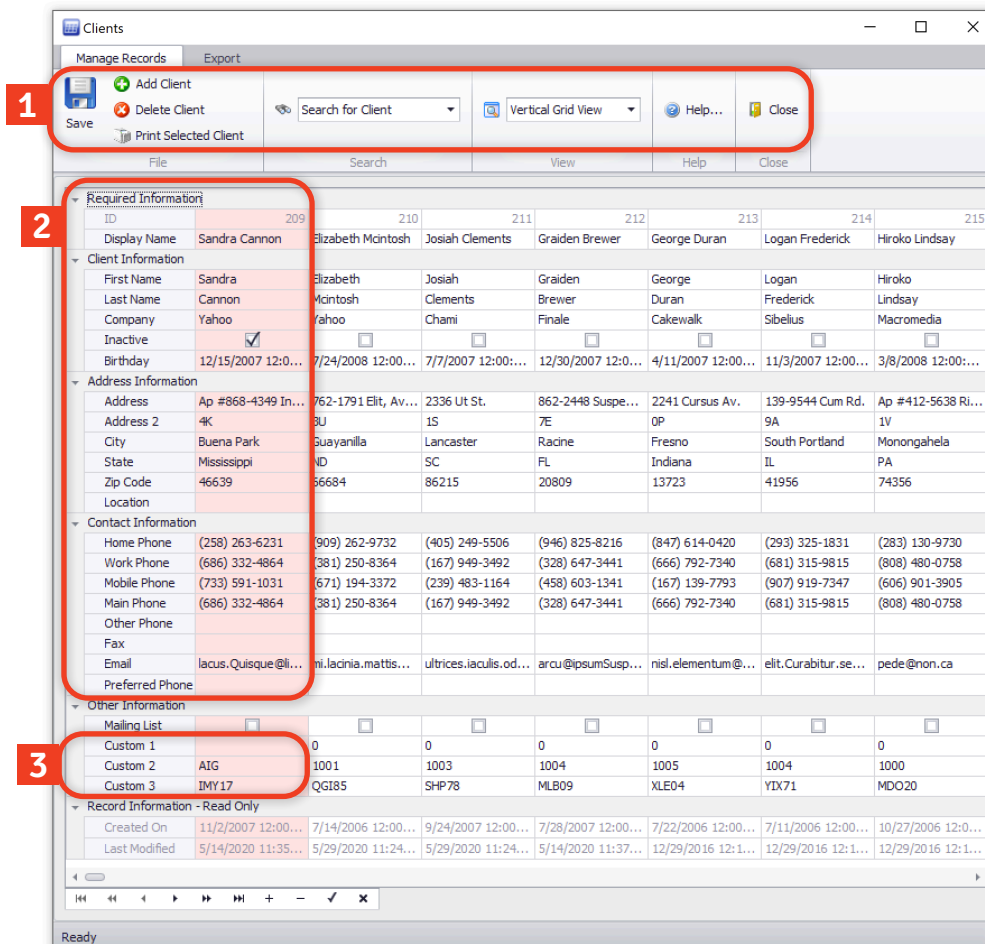


1

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**.

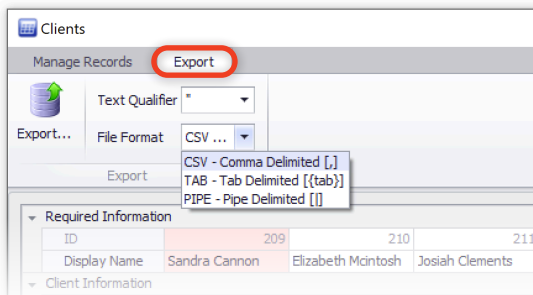
2

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.



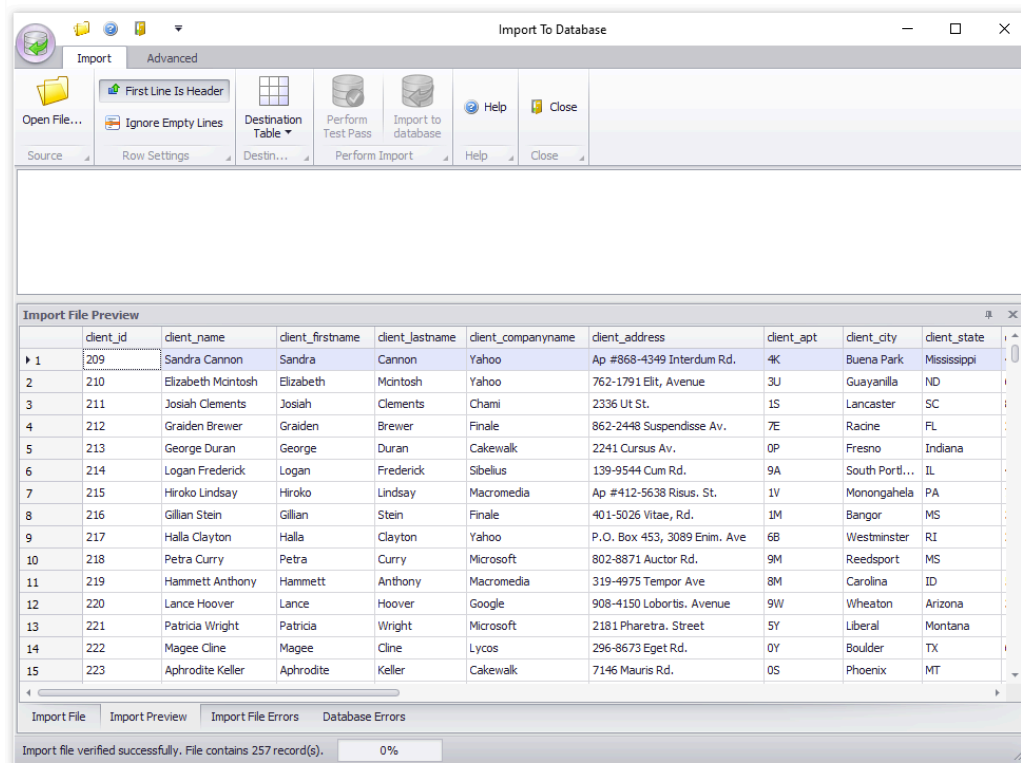
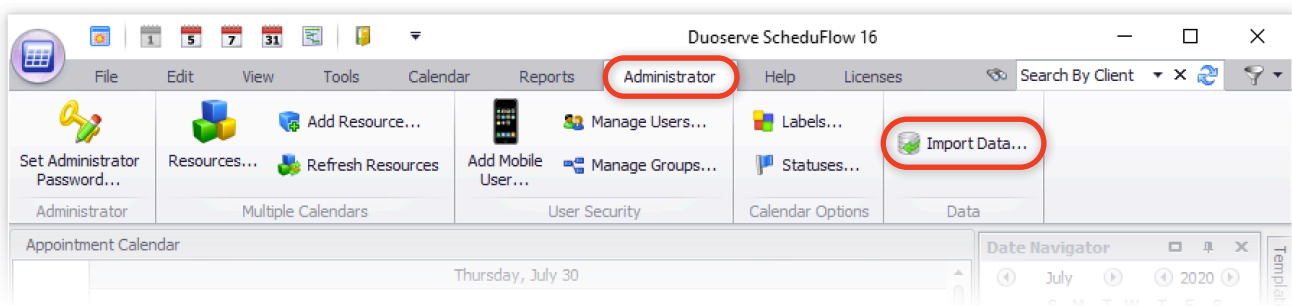
3

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



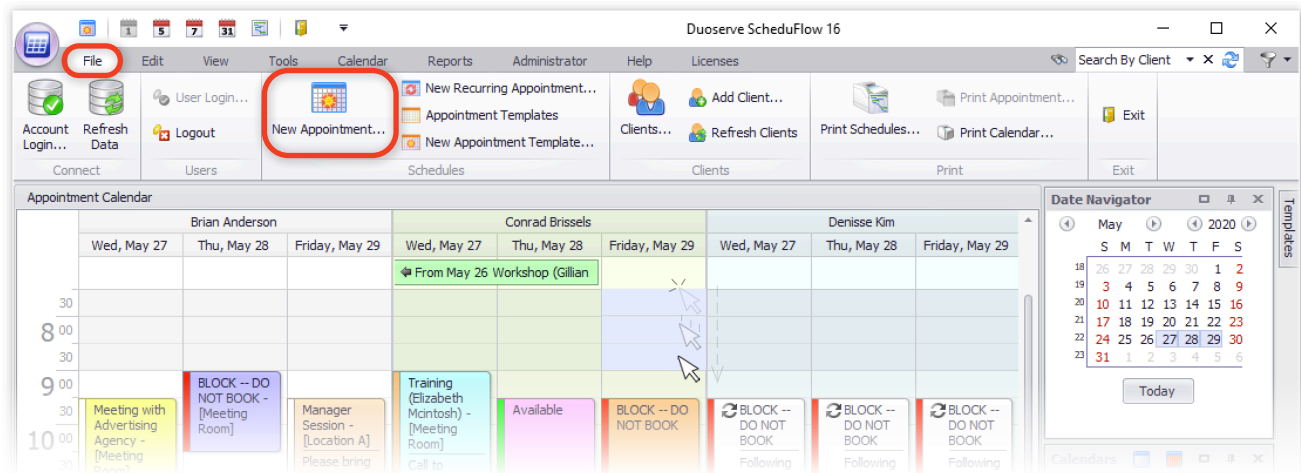
Clicking the **Export** -tab will let you export a list of your Clients to a CSV, TAB or **PIPE** -file.

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**.



MANAGING APPOINTMENTS

Add, delete and edit Appointments



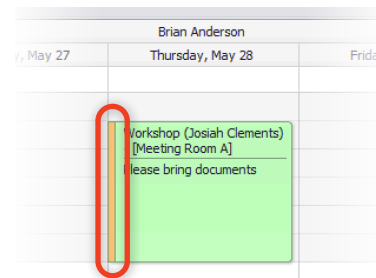
A new **Appointment** can be created in several ways. You can click **New Appointment** under the **File** -tab or you can double click on a date and time of choice in the **Appointment Calendar**. You can also click and drag to select a duration for the Appointment before you create it.

Pick the Employee or Resource that will administer the Appointment.



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**.



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**.

Open Currently Selected Client will open the dialogue to edit the Client information.

Add New Client will open the Clients form to allow you to quickly create a new Client.

Unassign Client will clear the field.

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.



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.

Appointment

Employee/Resource
Appointment with: Brian Anderson
Time as: Busy

Appointment
Appointment for: Josiah Clements
Label As: Confirmed
Subject: Workshop
Location: Meeting Room A
Description: Please bring documents

Client Contact Information
First Name: Josiah
Last Name: Clements
Company: Chami
Email: ultrices.laculis.odio@neceler...
Work Phone: (167) 949-3492
Home Phone: (405) 249-5506
Mobile Phone: (239) 483-1164
Main Phone: (167) 949-3492
Other Phone:
Fax:
Preferred

Time information
Start Time: 5/28/2020 06:30 AM
End Time: 5/28/2020 08:00 AM
☐ Reminder 0 minutes
☐ All Day Event

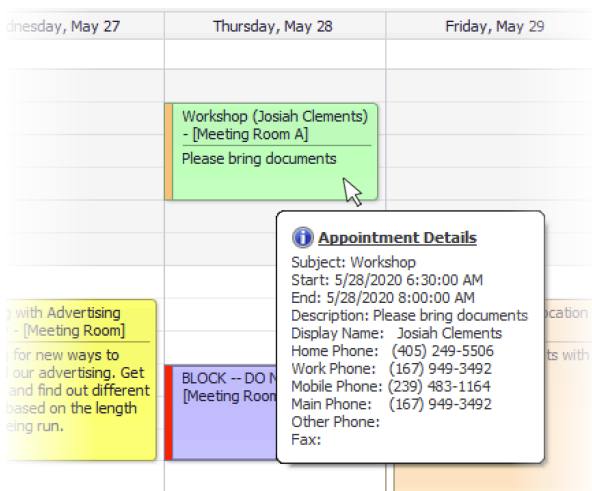
Recurrence OK Cancel Help

Ready

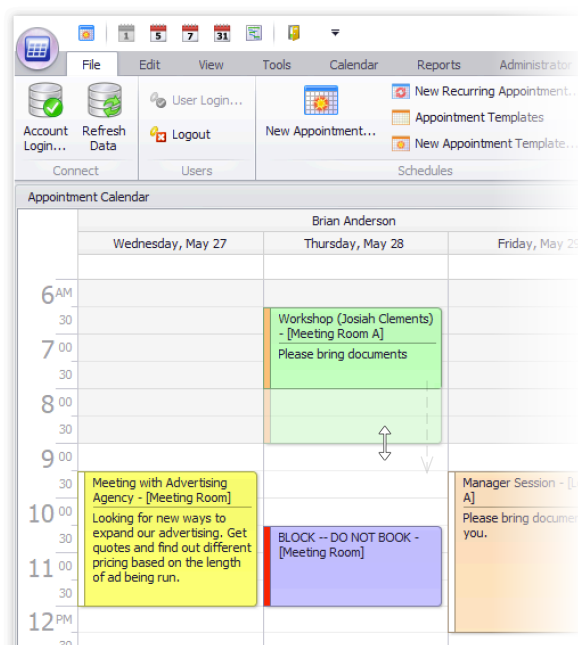
Under **Time Information** you get an overview of the **Start-** and **End Time** of the Appointment.

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 Recurring Event, click **Recurrence** (see p. 21)

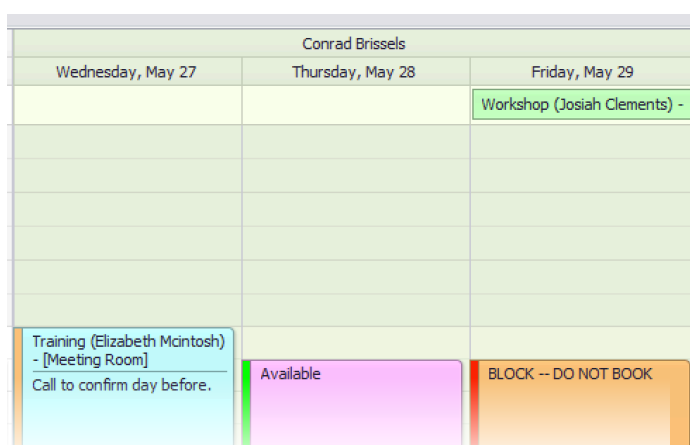
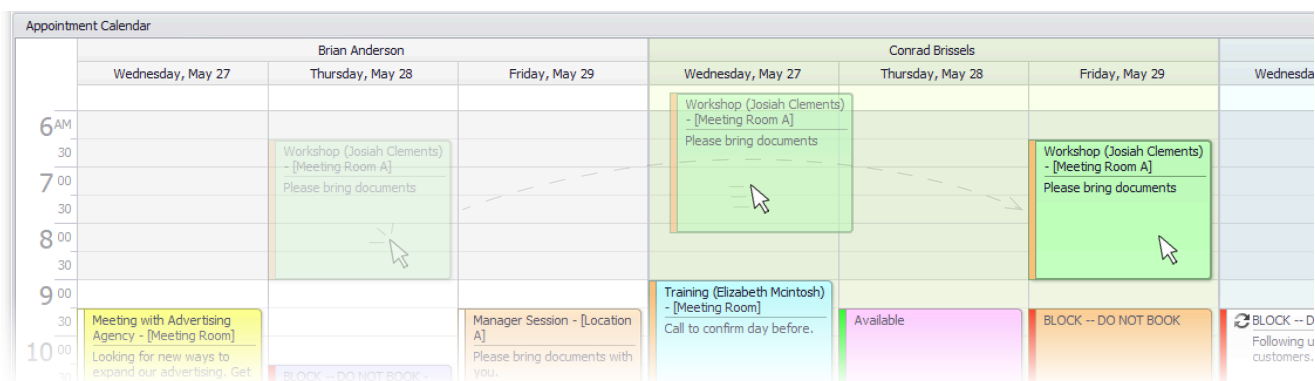


Once the Appointment is created, you can hover your mouse cursor over it to reveal further information. Note that the **Time As** -selection for **Busy** is shown as an orange stripe and the **Label As** for **Confirmed** colors the event green.

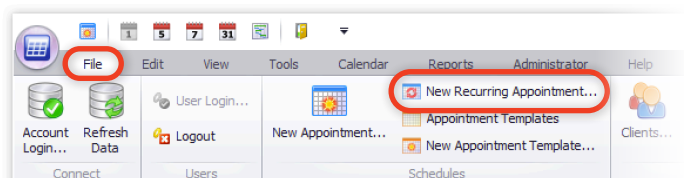


You can easily edit the Appointment time by clicking and dragging it, or by clicking and dragging on either the top or bottom edge of it.

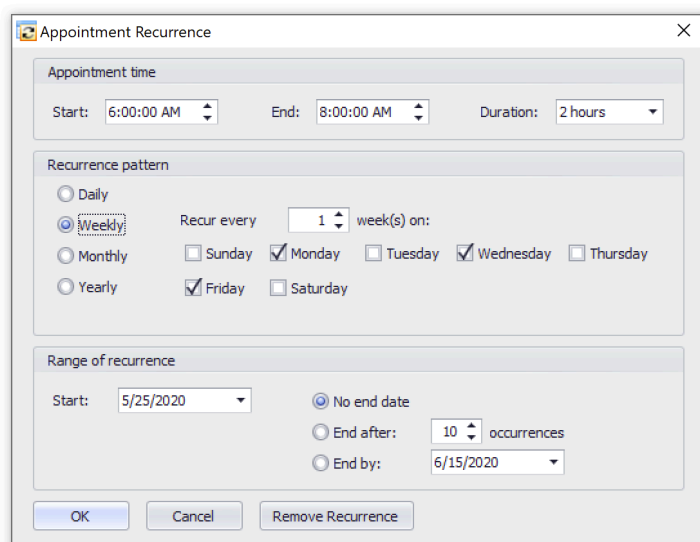
You can drag and drop an Appointment from one Resource to another. You can also copy and paste Appointments.



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.



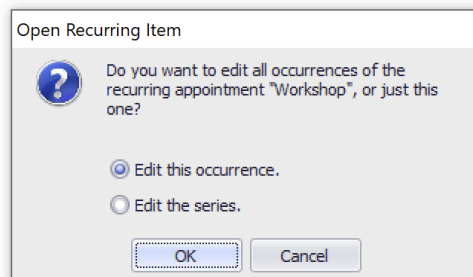
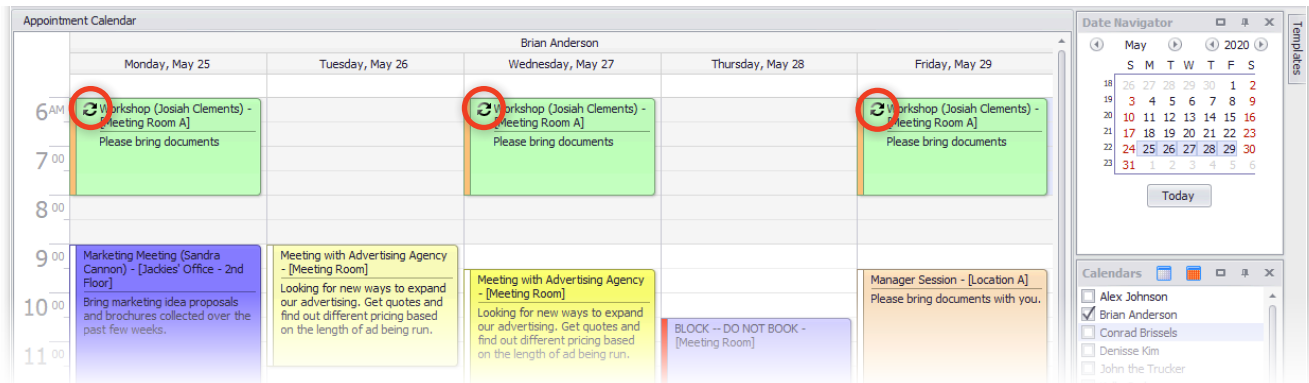
You can also make a Recurring Appointment by clicking the **New Recurring Appointment** -button, or the Recurrence -button when creating an Appointment.



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

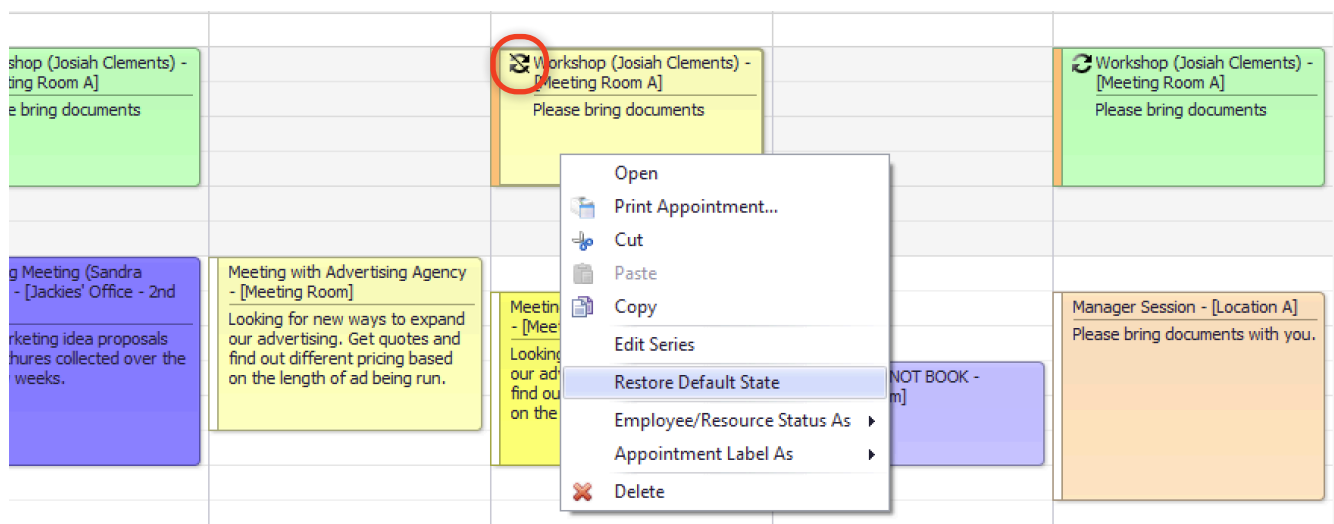
For example you can set the Appointment to happen Weekly on Monday, Wednesday and Friday, starting May 25th through June 15th.

Recurring Appointments are marked with a recurrence -icon applied to it in the form of these circle arrows.



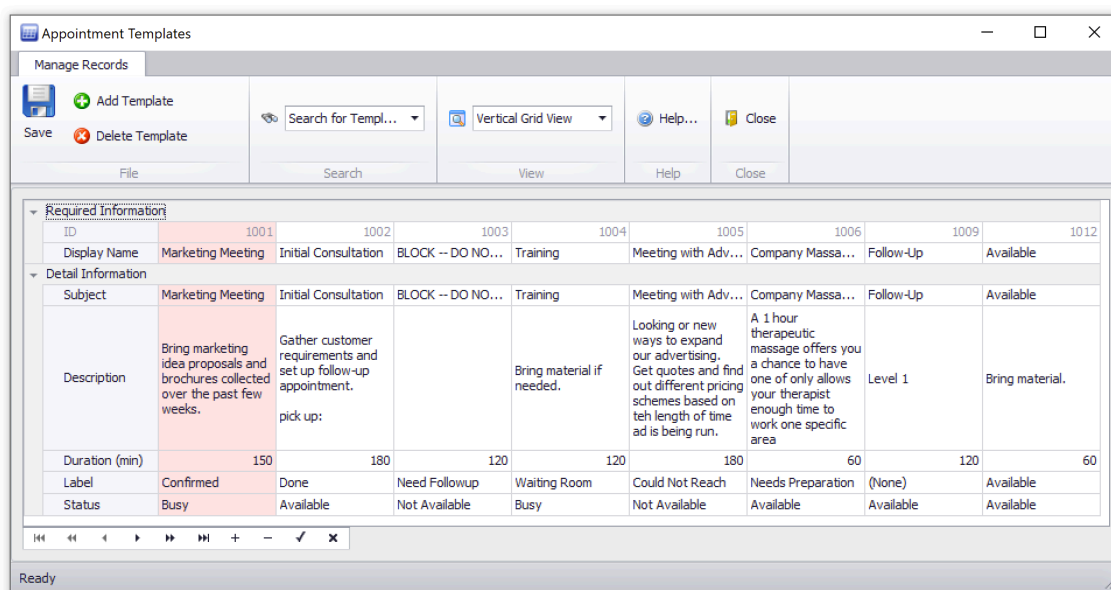
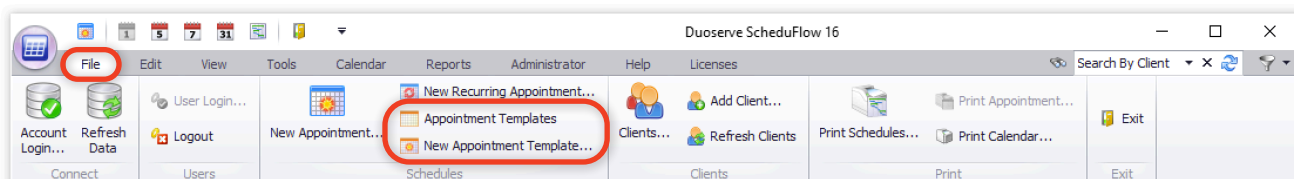
When you click to edit a Recurring Appointment you will get the option to either **Edit the Series** or this **Specific Occurrence**.

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.

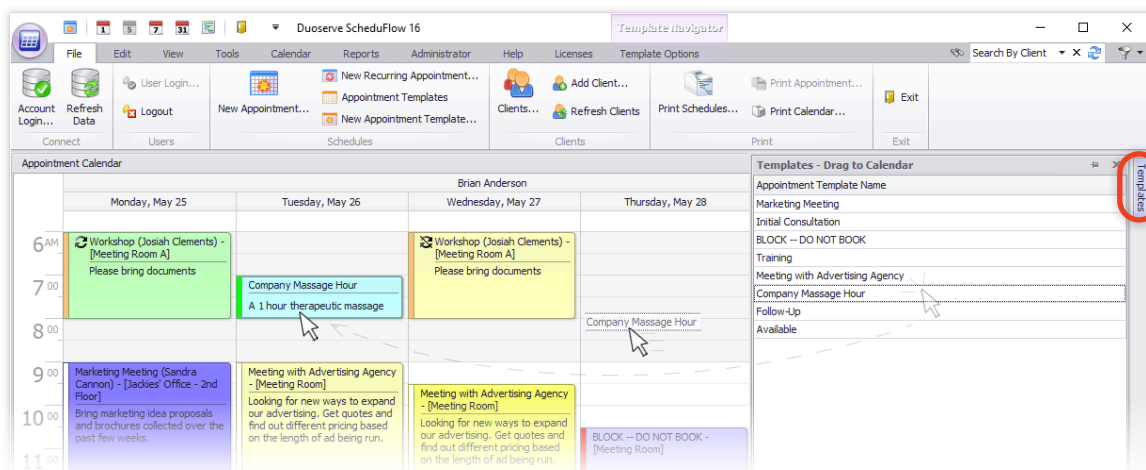


If you wish to restore an Appointment to it's original series-form, simply right-click it and choose **Restore Default State**.

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.



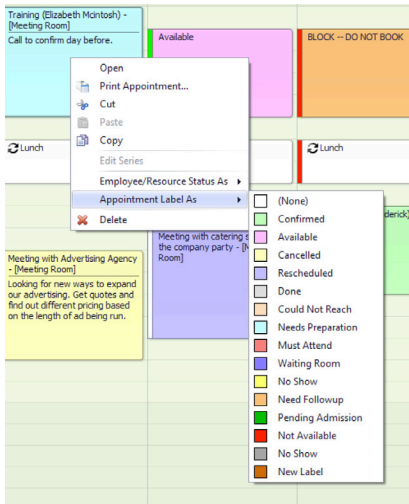
You can easily find and use them by clicking the **Template** -tab to the right.



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

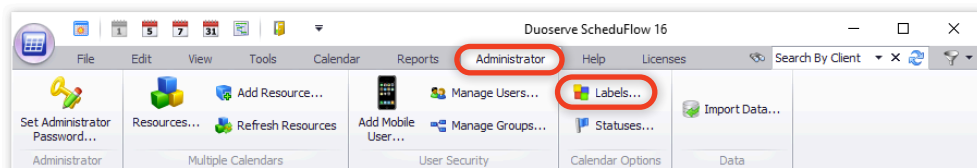
Creating and using Labels to mark and color Appointments



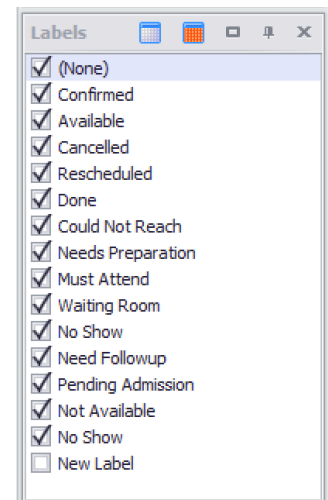
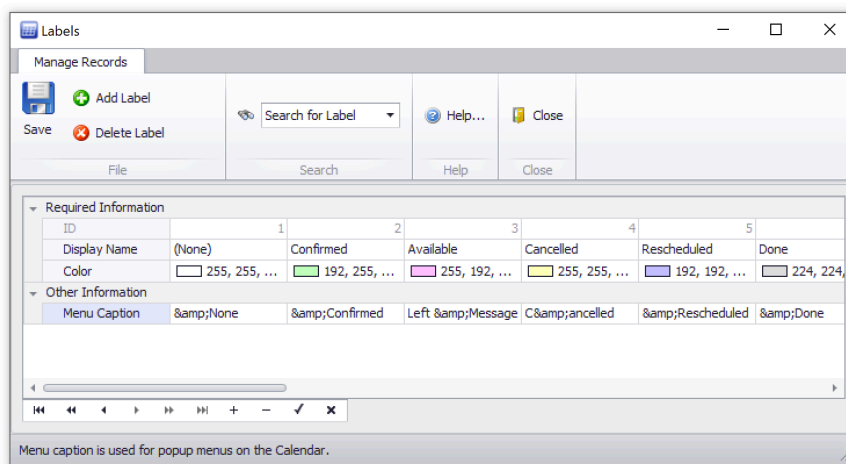
Appointments can be assigned a **Label** to help you organize and find them easier. Each Label has a name and a color.

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.



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



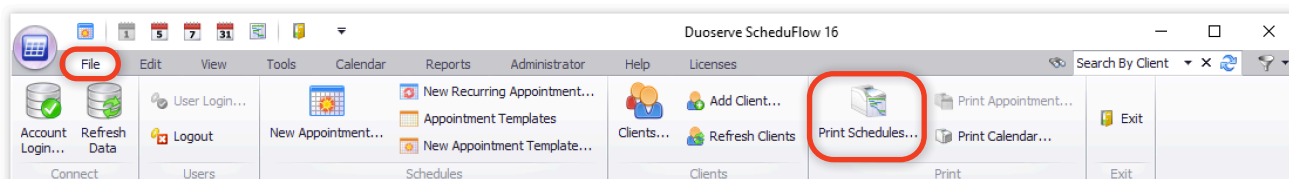
To add a new Label, click **Add Label**, enter a Display Name and assign a color. ScheduFlow comes pre-loaded with several labels that you can choose to use, rename or delete if want to.

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.



1

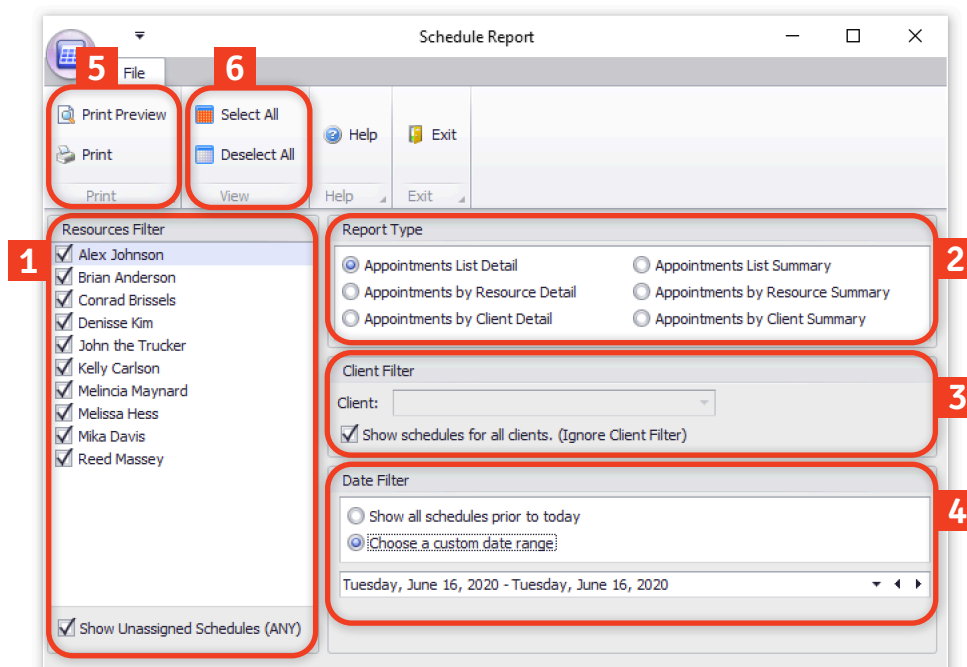
The **Resource Filter** lists all the Resources in your system. Check the ones you want to include in your report. **Show Unassigned Schedules (ANY)** will also include unassigned schedules.

2

Lists the **Report Types** that you can create. (see p.26)

3

Choose whether to **Filter** the report by a specific Client.



4

Select a Date range or show all schedules prior to today's date.

5

Print Preview to preview the report, export it or share it. **Print** to directly print it.

6

Click to **Select All** or **Deselect All** Resources.

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)

Appointment List - Detail

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 Brussels	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 Brussels		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 Brussels			Cancelled
3:30:00 PM - 4:30:00 PM	Available	Bring material.	Reed Massey		Available	Available

Appointments by Resource - Detail

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

Tuesday, June 16, 2020

Resource: Brian Anderson

ID: 12

First Name:

Last Name:

Date Hired:

Notes:

Address:

Work Phone:

Home Phone:

Mobile Phone:

Email Address:

Start Time - End Time	Subject	Description	Location	Client Name	Preferred Phone
Wednesday, May 27, 2020					
6:00:00 AM - 8:00:00 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 - 2:00:00 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	Please bring documents with you.	Location A		
1:00:00 PM - 2:00:00 PM	Lunch				
2:30:00 PM - 5:00:00 PM	Training				

Appointments by Client - Detail

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

Tuesday, June 16, 2020

Client: John Hardy

First Name: John

Last Name: Hardy

Company: Adobe

Address: 640-1009 Nunc Road

City/State/Zip: Hannibal

Location:

4E

Virginia

23683

Work Phone: (130) 126-7698

Main Phone: (130) 126-7698

Mobile Phone: (263) 673-2842

Home Phone: (176) 570-9023

Fax:

Email:

libero.Morbi.accumsan@penatibus.com

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

Appointment List - Summary

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 Brussels	Elizabeth McIntosh	
9:30:00 AM - 11:30:00 AM	BLOCK -- DO NOT BOOK		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 Brussels		
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 Brussels		
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 Brussels		
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 Brussels		
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			

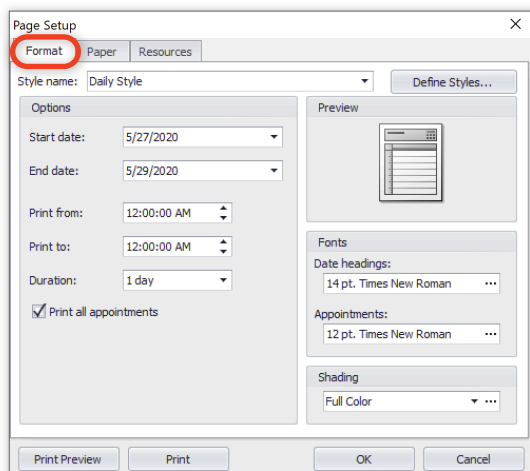
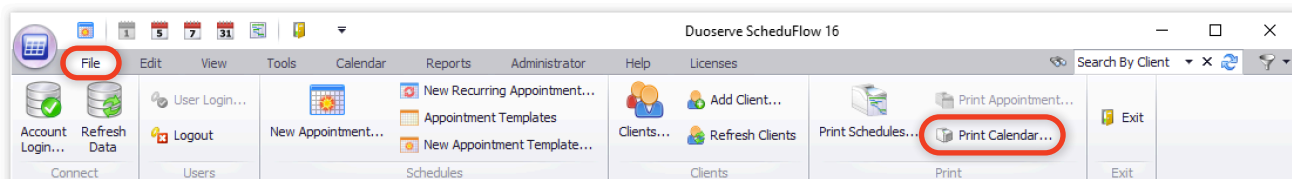
Appointments by Client - Summary

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

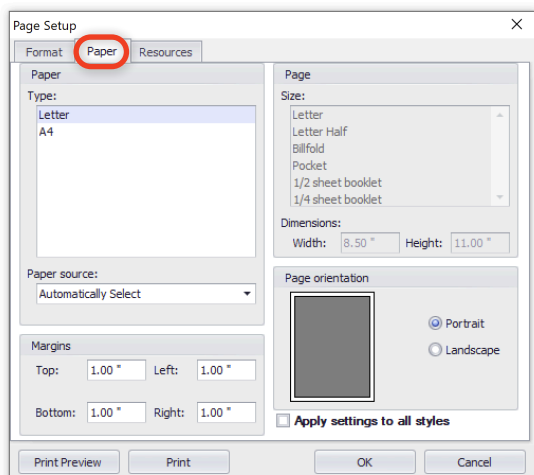
Client: John Hardy

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

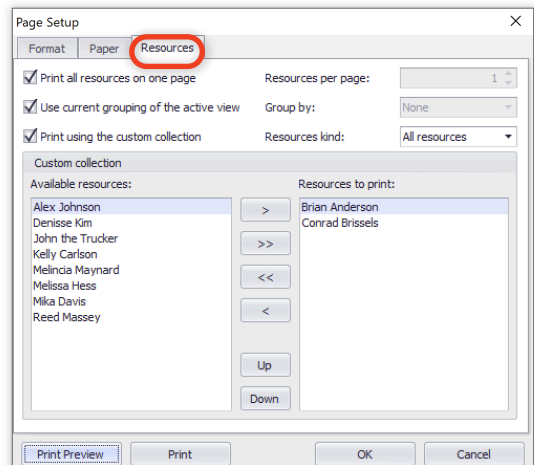
You also have the option to print a visual representation of your calendar by clicking **Print Calendar**.



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.



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 May 2020

Friday

May 2020

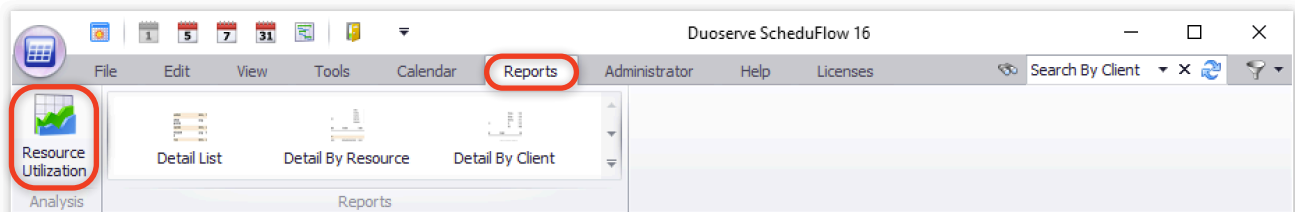
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

June 2020

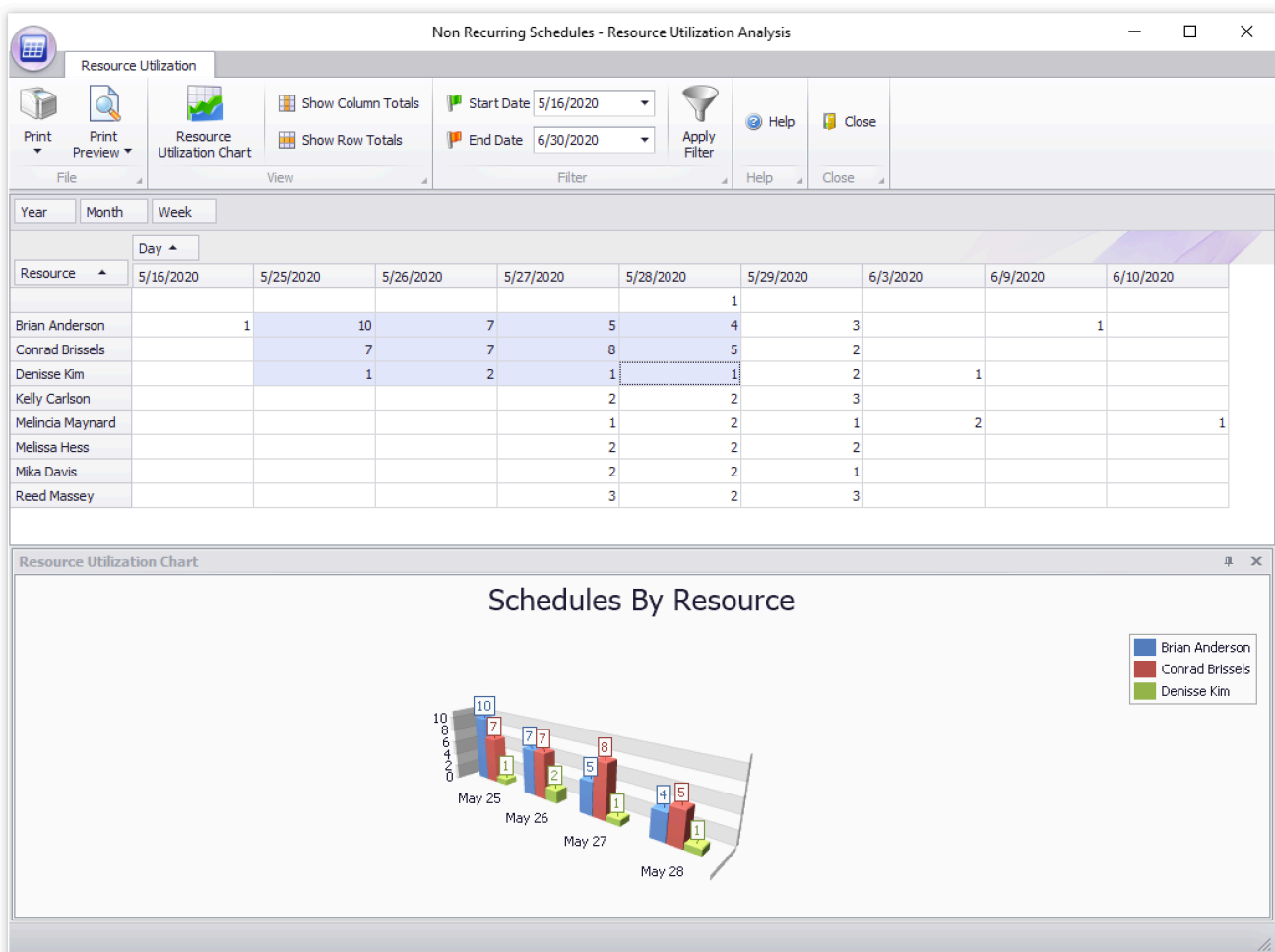
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

	Brian Anderson	Conrad Brussels
	Friday, May 29	Friday, May 29
12 AM		
2:00		
4:00		
6:00		
8:00	9:30 AM-12:30 PM Manager Session - [Location A]	9:30 AM-11:30 AM BLOCK -- DO NOT BOOK
10:00		
12 PM	Please bring documents with	12:00 PM-1:00 PM Lunch
2:00	1:00 PM-2:00 PM Lunch	1:30 PM-3:30 PM Training (Logan Frederick)
4:00	2:30 PM-5:00 PM Training	
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**.



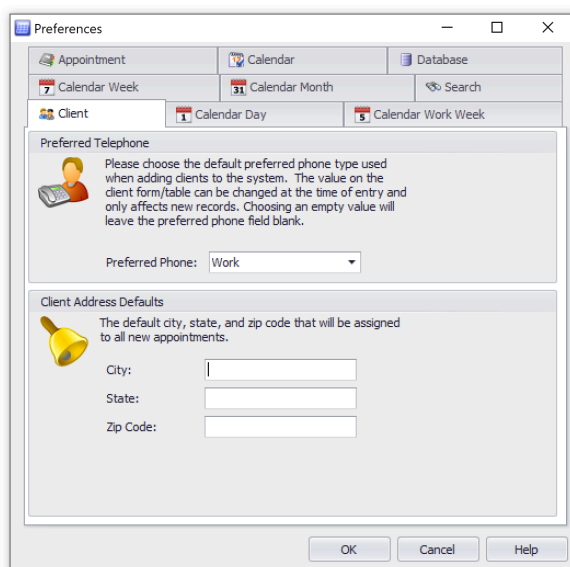
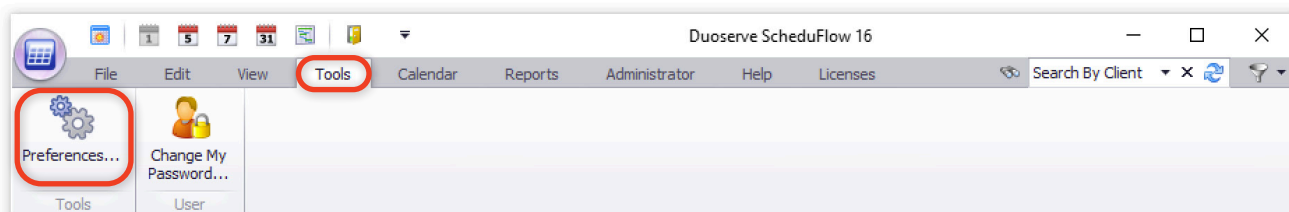
To generate a graph, select your preferred date range, then click and drag to select the information you want to include. You can then **Print Preview** or **Print** the graph.



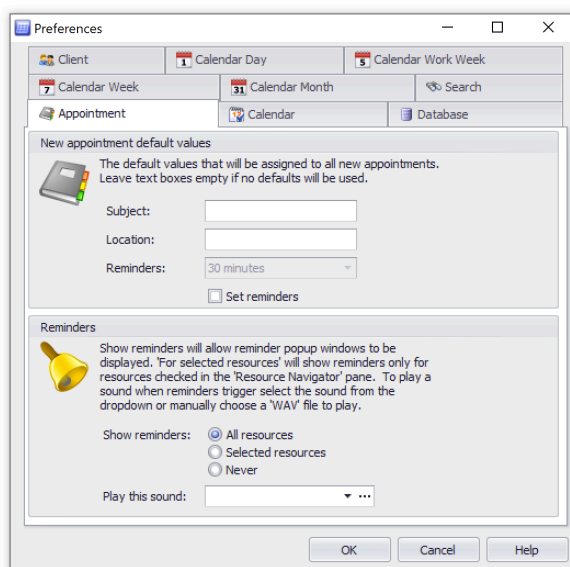
PREFERENCES

Adjusting settings and default values

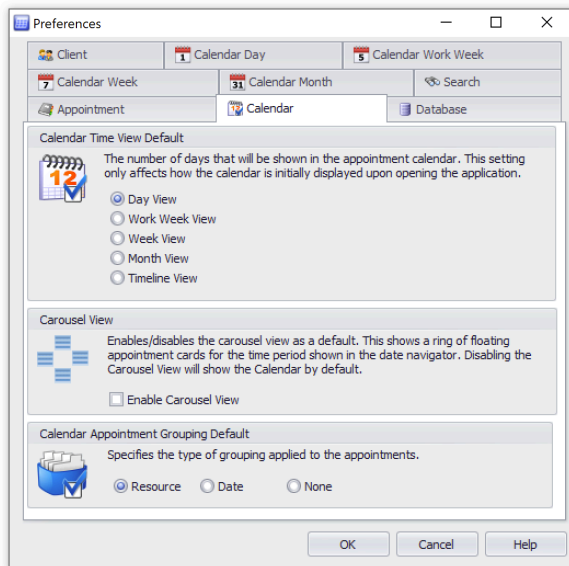
Under the **Tools** -tab you will find the **Preferences** panel. Here you have a number of different settings regarding how ScheduFlow behave.



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.

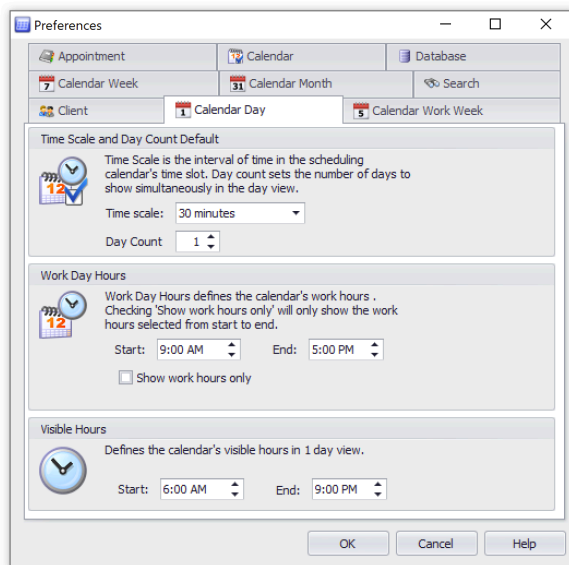


Under the **Appointment** -tab you can set the default values for new Appointments. You can also set to have pop-ups for reminders, including playing a sound when they appear.



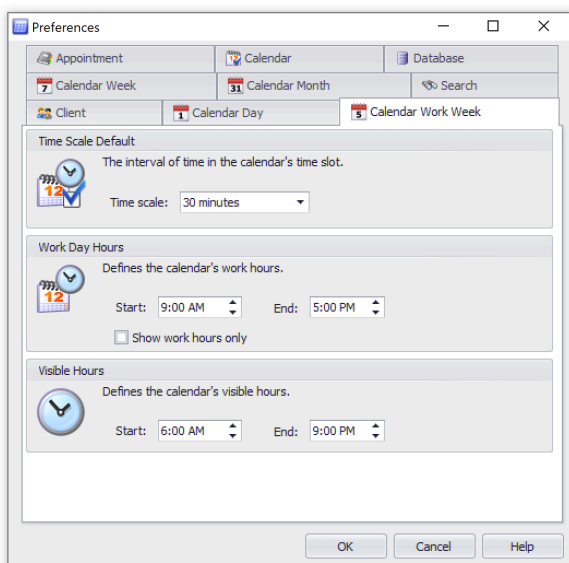
Under the **Calendar** -tab you can set the default values for how to view the calendar.

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



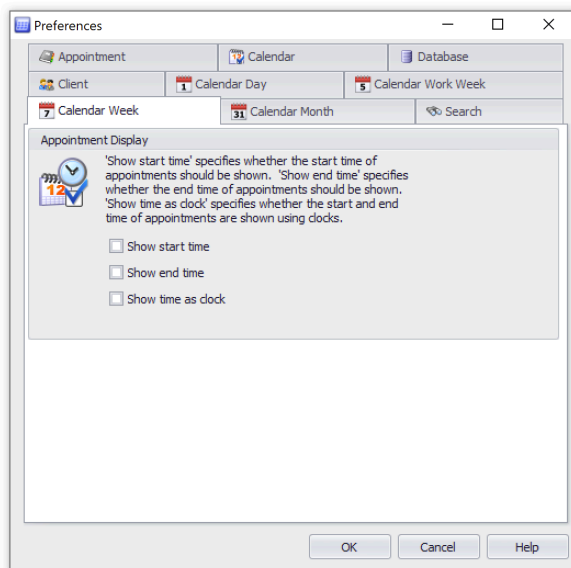
Under the **Calendar Day** -tab you can set the default values for how to view the calendar in the **Day View**.

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.



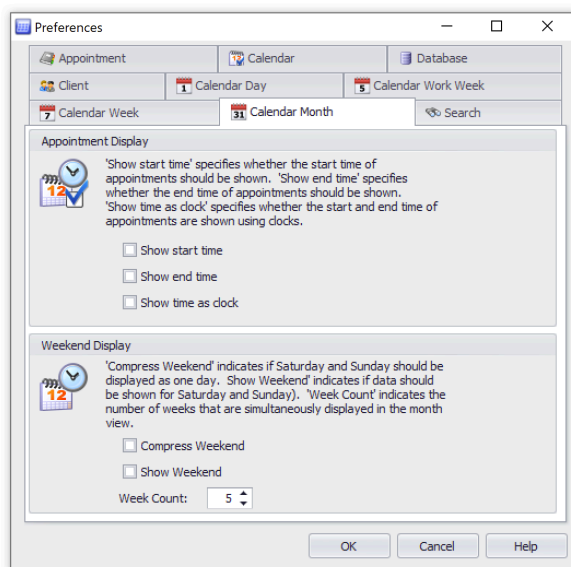
Under the **Calendar Work Week** -tab you can set the default values for how to view the calendar in the **Work Week View**.

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.



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

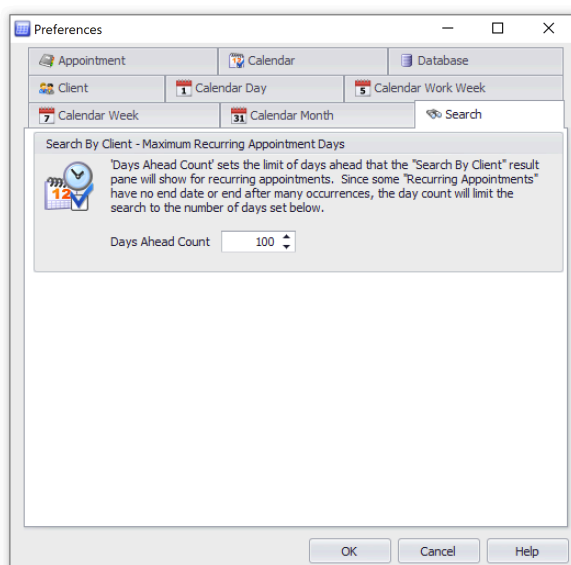
You can set whether you want to show the start time and/or end time for an Appointment. **Show time as clock** specifies whether the start and end time of Appointments are shown using clocks.



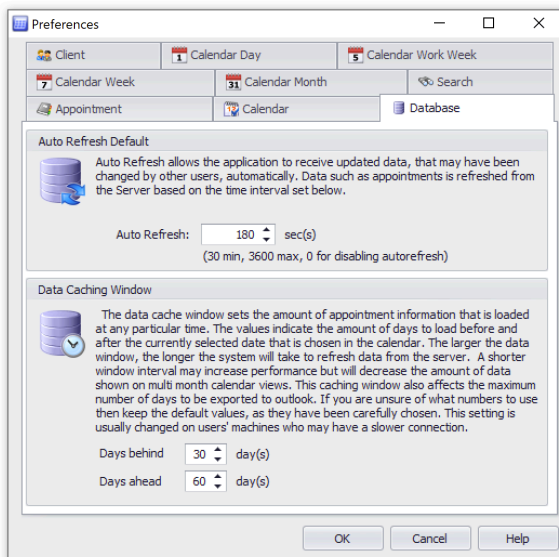
Under the **Calendar Month** -tab you can set the default values for how to view the calendar in the **Monthly View**.

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.



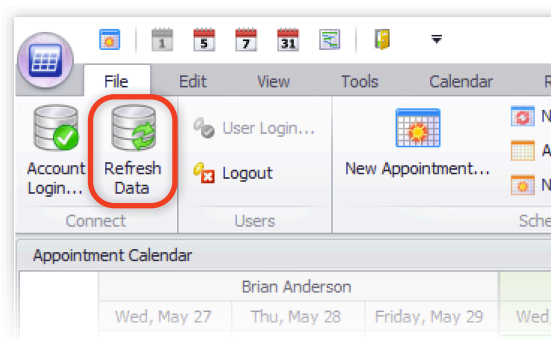
Under the **Search** -tab you can set the limit of days ahead that the **Search By Client** result pane will show for **Recurring Appointments**.



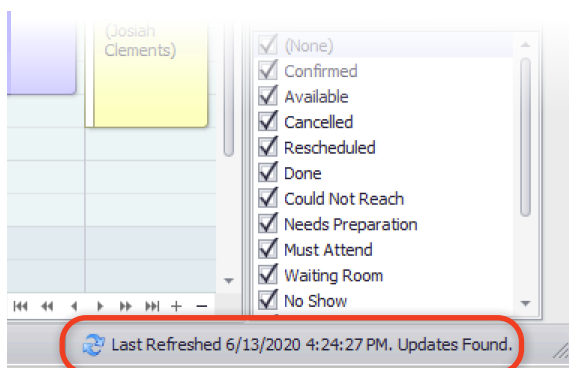
One of the more important Preferences is found under the **Database** -tab.

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 Caching 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

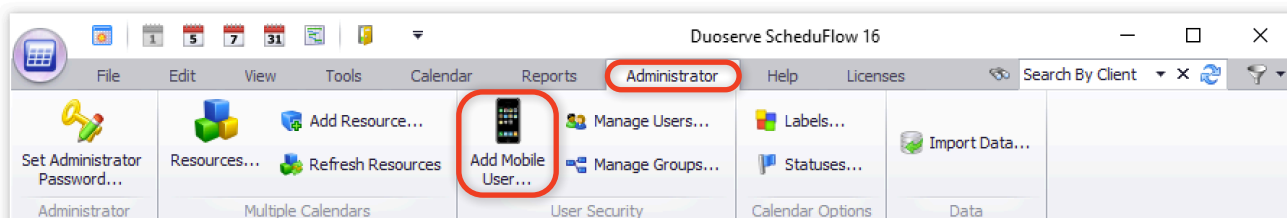


In the main window you can see in the lower right corner when the last refresh was made to the calendar.

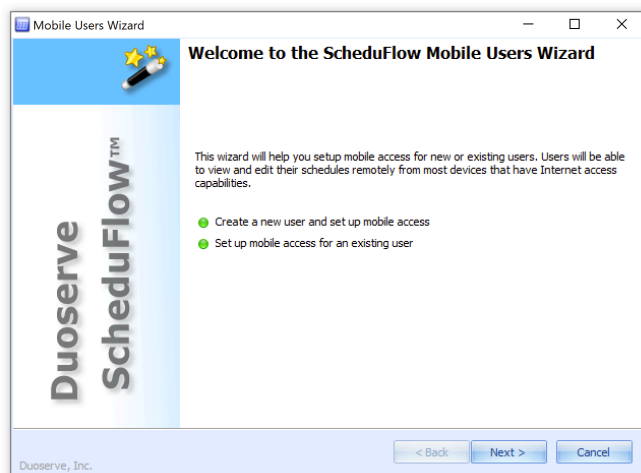
SCHEDUFLOW ON MOBILE DEVICES

Create Mobile Users and managing calendars from your mobile device

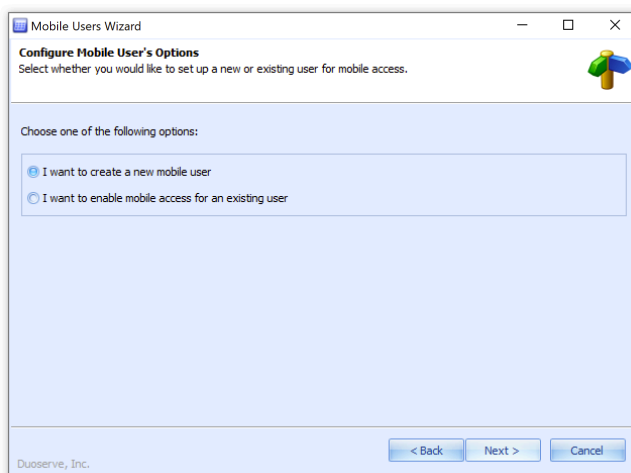
Once you have set up ScheduFlow to work in Multi-User Mode, you can let users login and use the calendar from a mobile device like a cellphone or a tablet. The ScheduFlow app which loads your ScheduFlow data on mobile devices is available for both Android and iOS.



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.



Click **Next**.

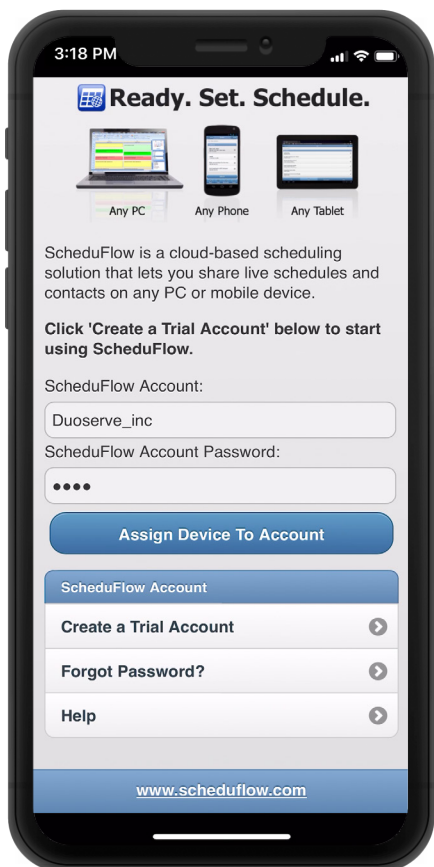


Select if you want to create a new mobile user or enable mobile access for an existing user, then click **Next**.

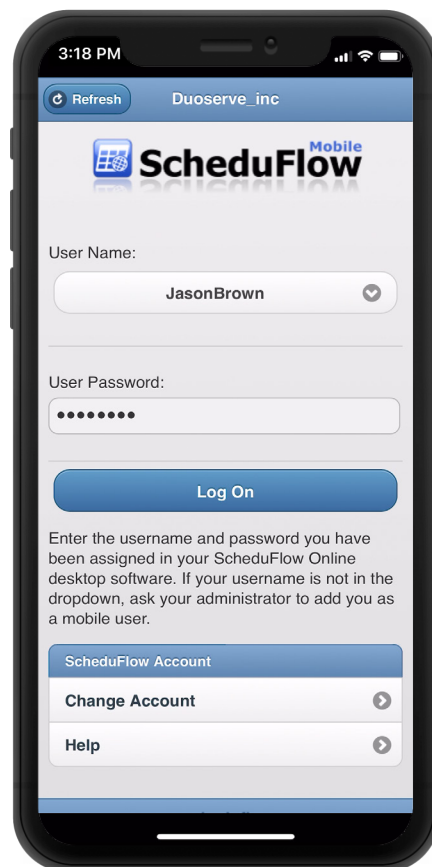


Note that if you create a new Mobile User, this user will automatically also be added to the regular user database.

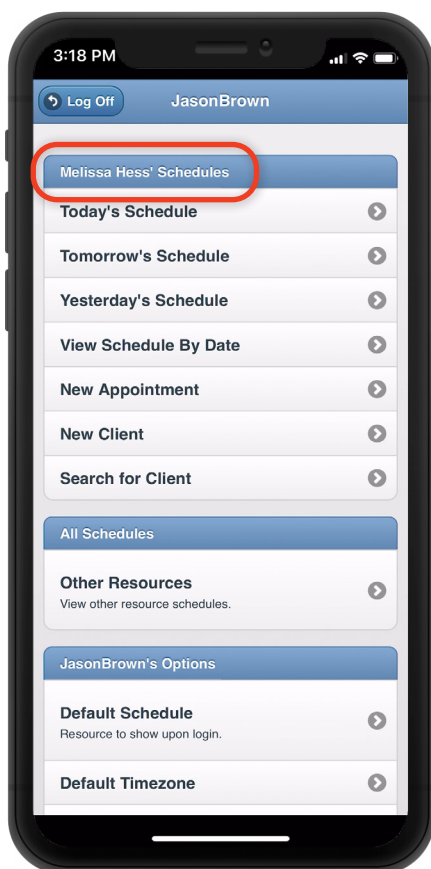
Set a username and password for the user as well as the privileges by selecting an option in the **Group** -dropdown menu. The **Default Resource** is the Resource that the mobile app will display on the main screen after logging in. Set what timezone the mobile user operates in and click **Next**.



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**.

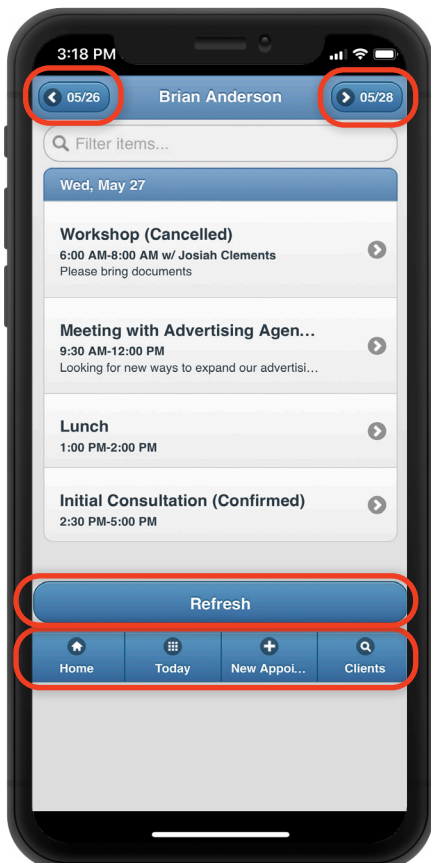


Once logged in, the **Default Resource Schedule** that was picked during the mobile user creation process is displayed at the top. However, you can look at any other Resource by tapping **Other Resources** on the main screen and then choosing another Resource.

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**.

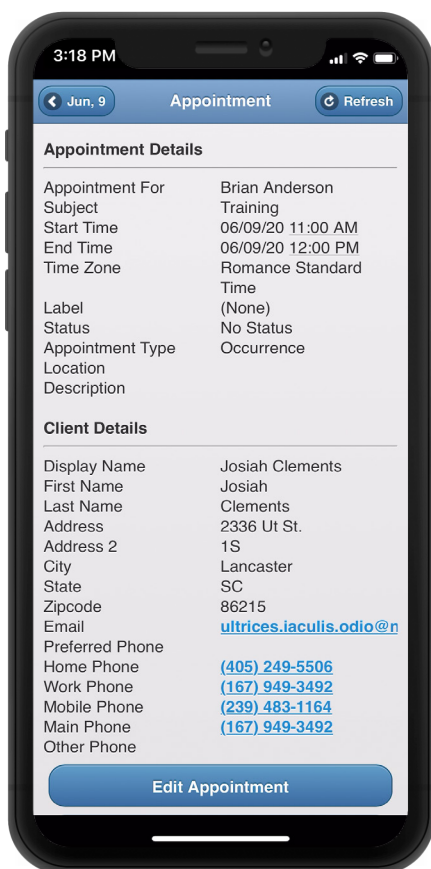


When you open a schedule, you can go back and forth, one day at a time, by tapping the right or left arrow-buttons at the top.

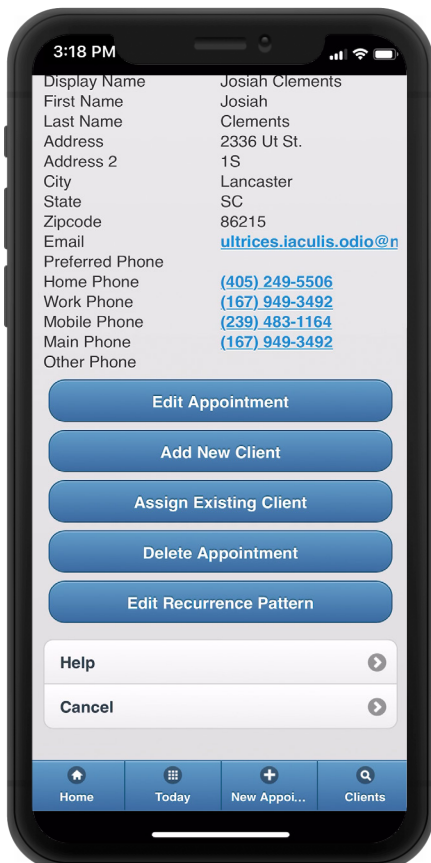
Tap on an Appointment to view further details about it.

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.



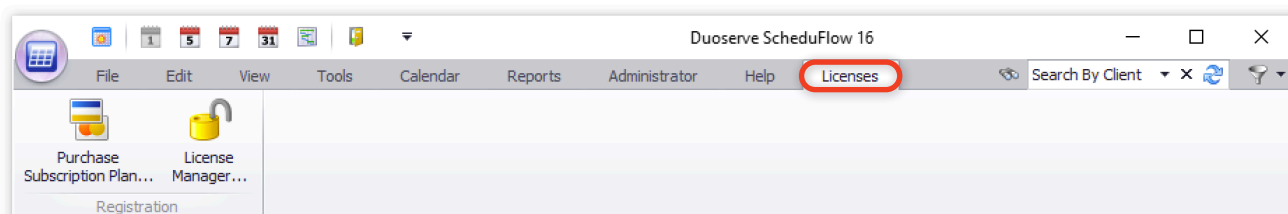
Scrolling further down will reveal several options. You can edit the Appointment, which will give you the ability to edit the time, duration, etc. You can also Add a New Client to the Appointment, Assign an Existing Client, Delete the Appointment or Edit the Reccurence Pattern.

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.

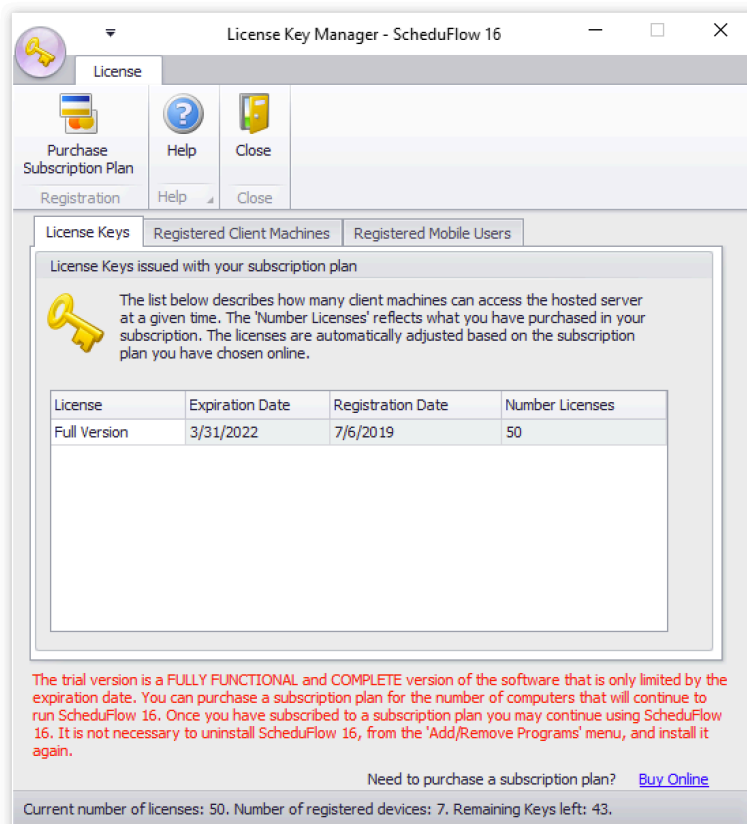
PURCHASING A SUBSCRIPTION

Managing licenses

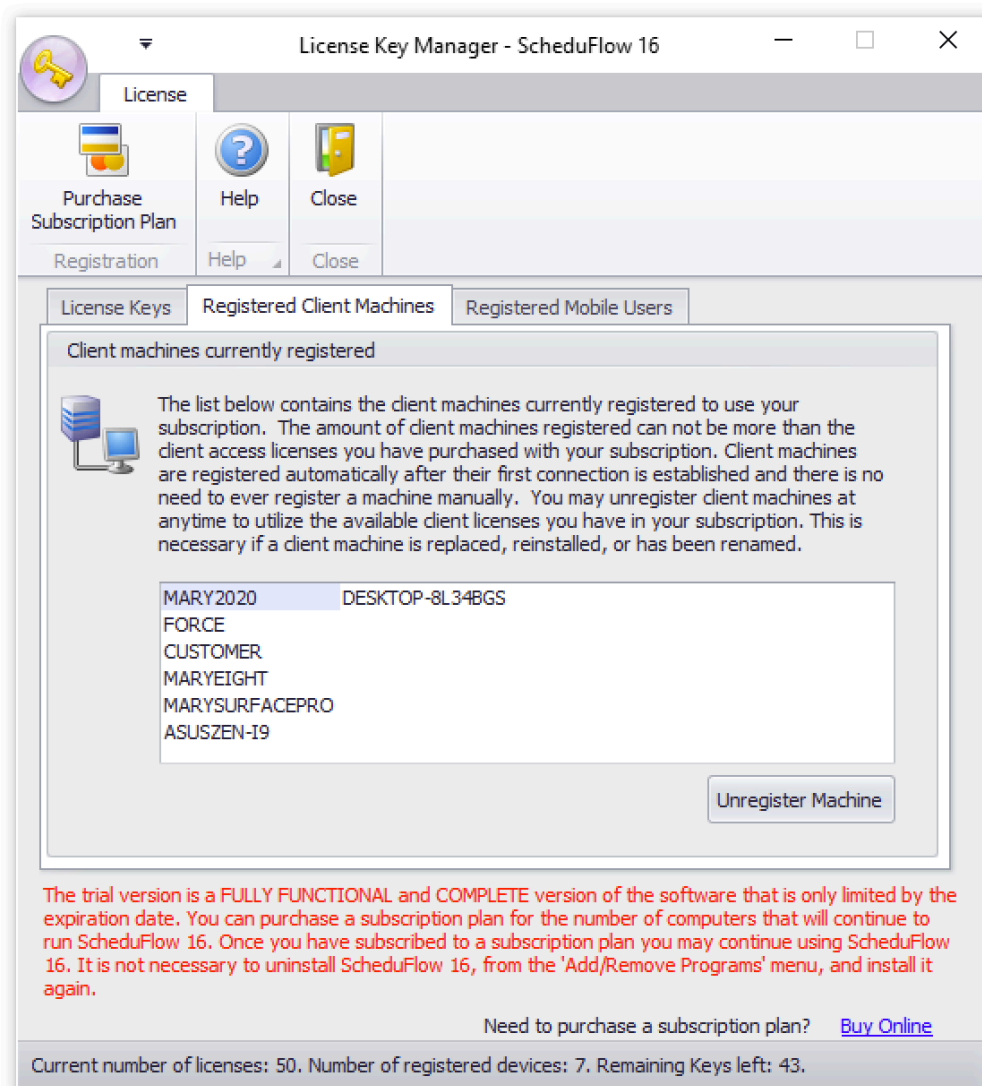
On the **Licenses** -tab, the **Purchase Subscription Plan** -button will take you to the Duoserve website. If your trial has expired, you will need to purchase a subscription in order to continue using ScheduFlow. Once you purchase a subscription, everything is set up automatically. Your payment will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



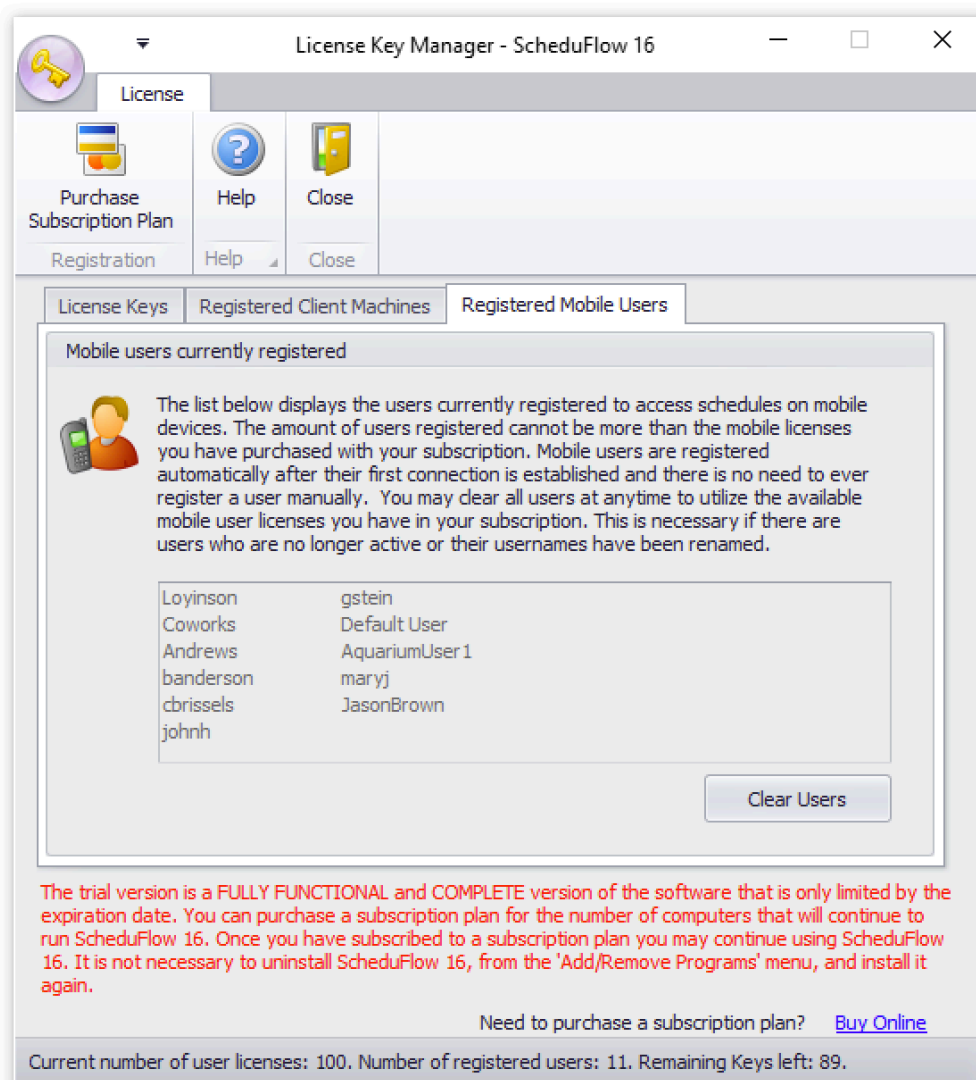
Clicking the **License Manager...** -button will show the Admin the current license or licenses that are active. It will also show you whether you are in the trial or subscribed - how many you have used and how many you have left.

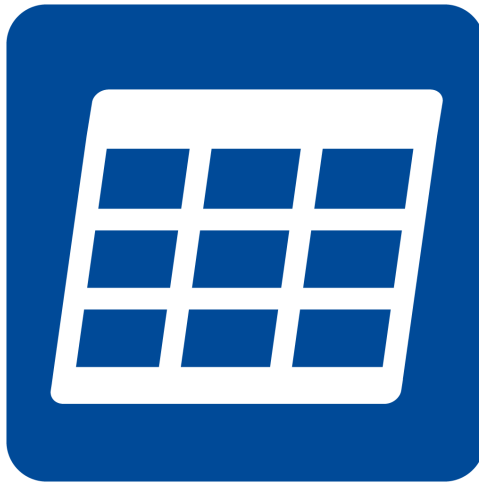


The **Registered Client Machines** -tab shows all the computers that have connected with ScheduFlow and are using a license. If you want to remove a machine from the list, simply select it and click **Unregister Machine**. This will give room for a new machine to connect.



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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Thanks for choosing ScheduFlow!

If you have any questions, please feel free to contact us via support on support.duoseve.com.