Staff view and edit booking control settings

On Main page > Booking > Setup
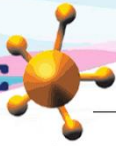
Therapist view booking control

The system defaults to no control, therapist can view all bookings.

Therapist view booking control
(When control is enabled and user is also a therapist,
at staff master > Therapist view all booking can select :-
- Therapist can view all booking
- Therapist can only view own booking)

Therapist can view all booking
[Press here change to enable therapist view booking control]

Click here to activate the function.

When control is enabled, User can edit right in staff master.
Set whether staff allow therapist to view all bookings.

Edit staff

Staff code *** must input	ST01 (Maximum 15 characters, please avoid input ', !, @, $, #, %, ^, &, *, space.) [If the staff is a user, staff login= staff code.]
Default shop *** must input	Wanchai
Staff name *** must input	Mandy (Maximum 100 characters)
English full name	(Maximum 100 characters)
Chinese full name	(Maximum 100 characters)
Gender	M
Identity card	
Marital Status	Single / Divorced
Join date	28 / Jun / 2018

Staff must have user and salesperson identities.

Staff system identity	
User	☑ Yes [Users can login to the system.]
Sales	☑ Yes [Sales can receive commission. Sales code can be used as a criterion for sales analysis.]
Therapist	☑ Yes [Therapist can accept booking, finish treatment and receive wages. Therapist code can be used as a criterions for treatment done analysis.]

On therapist – Therapist view all booking

Therapist

Therapist group	Body Notes : Therapist at same group will receive same wages scheme
Therapist department	☐ BODY ☑ FACIAL
Therapist view all booking	Not allow, therapist can view own booking only
	Allow, therapist can view all booking
	Not allow, therapist can view own booking only

Submit   **Reset**   **Cancel**

Press [Submit] to save staff master.
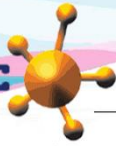
Consultant/Sales view booking control

The system defaults to no control, Consultant/Sales can view booking for all members.

Consultant/Sales view booking control
(When control is enabled, at staff master can add staff in control.
At staff master footer > Consultant view member rights can select control rules :-
- Only view own members
- Can view own shop selected consultant member
- Can view all shop selected consultant member
- Can view all members)

Consultant/Sales can view all booking
[Press here change to enable consultant/ sales view booking control]

Click here to activate the function.

When control is enabled, User can edit right in staff master.

| Edit staff	
Staff code *** must input	ST01 (Maximum 15 characters, please avoid input ', !, @, $, #, %, ^, &, *, space.) [If the staff is a user, staff login= staff code.]
Default shop *** must input	Wanchai
Staff name *** must input	Mandy (Maximum 100 characters)
English full name	(Maximum 100 characters)
Chinese full name	(Maximum 100 characters)
Gender	M
Identity card	
Marital Status	Single / Divorced
Join date	28 / Jun / 2018
Staff system identity	
User	☑ Yes [Users can login to the system.]
Sales	☑ Yes [Sales can receive commission. Sales code can be used as a criterion for sales analysis.]
Therapist	☑ Yes [Therapist can accept booking, finish treatment and receive wages. Therapist code can be used as a criterions for treatment done analysis.]

Staff must have user and salesperson identities.

On Sales - Consultant/Sales view booking control

Sales	
Sales group	Senior Sales Notes : Sales at same group will receive same commission scheme
View all sales invoice rights	☑ Can view all sales invoice
Consultant/Sales view booking control	Consultant/Sales view booking control is enabled
If this sales is also a user,
Tick will add this staff in control

☑ Add this staff in control

Setup control rules at footer - Consultant view member rights |
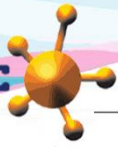
Check the box, this staff needs to be controlled.

Submit   Reset   Cancel

Press [Submit] to save staff master.

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After successfully saving staff master.

Users can set control rules at the bottom of the page, press [Consultant view member rights].

Back | View | Edit | Leave / Rest days | Password | Inactive | Delete | **Consultant view member rights**

Mandy (ST01) - Consultant view member rights

View member rights :	Can view all members

Only view own members
Can view own shop following selected consultant member
Can view all shop following selected consultant member
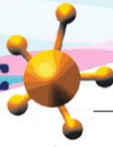Can view all members

Submit   Reset   Cancel

After selecting the right, click [Submit] to save.

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Consultant/Sales booking action control

The system defaults to no control, Consultant/Sales can handle booking for all members.

Consultant/Sales booking action control
(When control is enabled, at staff master footer > Consultant booking rights can select control rules :-
- Only handle own member booking
- Only handle following consultant's member booking
- Handle all member booking)

Consultant/Sales can handle all booking
[Press here change to enable consultant/ sales booking action control]

Click here to activate the function.

When control is enabled, User can use in staff master.

Edit staff	
Staff code *** must input	ST01 (Maximum 15 characters, please avoid input ', !, @, $, #, %, ^, &, *, space.) [If the staff is a user, staff login= staff code.]
Default shop *** must input	Wanchai
Staff name *** must input	Mandy (Maximum 100 characters)
English full name	(Maximum 100 characters)
Chinese full name	(Maximum 100 characters)
Gender	M
Identity card	
Marital Status	Single / Divorced
Join date	28 / Jun / 2018

Staff must have user and salesperson identities.

| Staff system identity	
User	☑ Yes [Users can login to the system.]
Sales	☑ Yes [Sales can receive commission. Sales code can be used as a criterion for sales analysis.]
Therapist	☑ Yes [Therapist can accept booking, finish treatment and receive wages. Therapist code can be used as a criterions for treatment done analysis.]

Users can set control rules at the bottom of the page, press [Consultant booking rights].

Back | View | Edit | Leave / Rest days | Password | Inactive | Delete | Consultant booking rights

Mandy (ST01) consultant booking right	
Consultant booking rights :	Handle all member booking
	Can only handle own member booking
	Can only handle following consultant's member booking
	Handle all member booking

Submit   Reset   Cancel

After selecting the booking rights, click [Submit] to save.
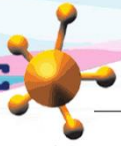
User edit booking control according to user group and member group

The system defaults to no control, users can edit all bookings.

User edit booking control according to user group and member group	All users can edit all booking [Press here change to enable user edit booking control]

Click here to activate the function.

When control is enabled, press [Setup].

User edit booking control according to user group and member group	User edit booking control according to user group and member group is enabled Setup [Press here change to all users can edit all booking]

Setup user(according to user access group) allow edit member(according to member group) booking	
User access group [Press user access group name to setup]	Allow edit member group
Admin	Group Buying, New, NonMember, Trial
User	New

Press [User access group] to setup.

Set users in this user access group to be able to edit member's booking in those member groups.

Setup User user allow edit member(according to member group) booking		
Member group		Select All
Group Buying		☐
New		☑
NonMember		☐
Trial		☐

Check the member group that the user is allowed to edit.

Submit   Reset   Close

Press [Submit] to save.