Rendezvous
Appointment Book
User Guide - iPad
V3.0

For iPhones and iPads running iOS 12.x

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All About Rendezvous
User Guide Overview

The Rendezvous Appointment Book is easy to use. We probably really don't need a manual, but it's always a comfort to know that should you need to reaffirm how a feature works; this "Mega" User Guide is here to help.

Why Use Rendezvous? Rendezvous is unique because it mimics how appointments are typically scheduled using a traditional week or day planner. There are many calendar apps for the iPad and all of them can be used as an appointment book, but because all of these apps include far more features that are just not needed to keep a simple appointment book, they can be overwhelming.

Rendezvous is ONLY an appointment book; nothing more. So, it's easy to learn. But to further assist in making your transition to Rendezvous smooth, this User Guide explains all its features and how to use them.

iPad and iPhone Guides

This guide covers both devices.

Rendezvous is a universal app so it can be used on the iPad and iPhone. While both the iPad and iPhone versions do the same tasks - schedule appointment and store and manage client, the iPad, because of its screen size has a few additional calendar views and features. It's designed for use in a facilities environment (salon, shop, office), while the iPhone is always with you so you can see, add and modify appointments and client data on the go. All functions work in an identical manner.

When you run the universal application on a small-screened device, you'll see the iPhone version and when you run the app on your iPad, you'll see the larger, iPad-only version (Mini too). And these won't just be blown up, oversized iPhone or miniature iPad apps either - they'll be custom designed apps made specifically for each.

# iPad User Guide

Calendar View

Rendezvous on the iPad has four calendar views - Day, Week, Month and Year plus a List View. These views are designed to provide easy navigation and appointment-making in a rich and vibrant User Interface. Each of these views deliver exceptionally quick response to input.

Rendezvous Calendar Views
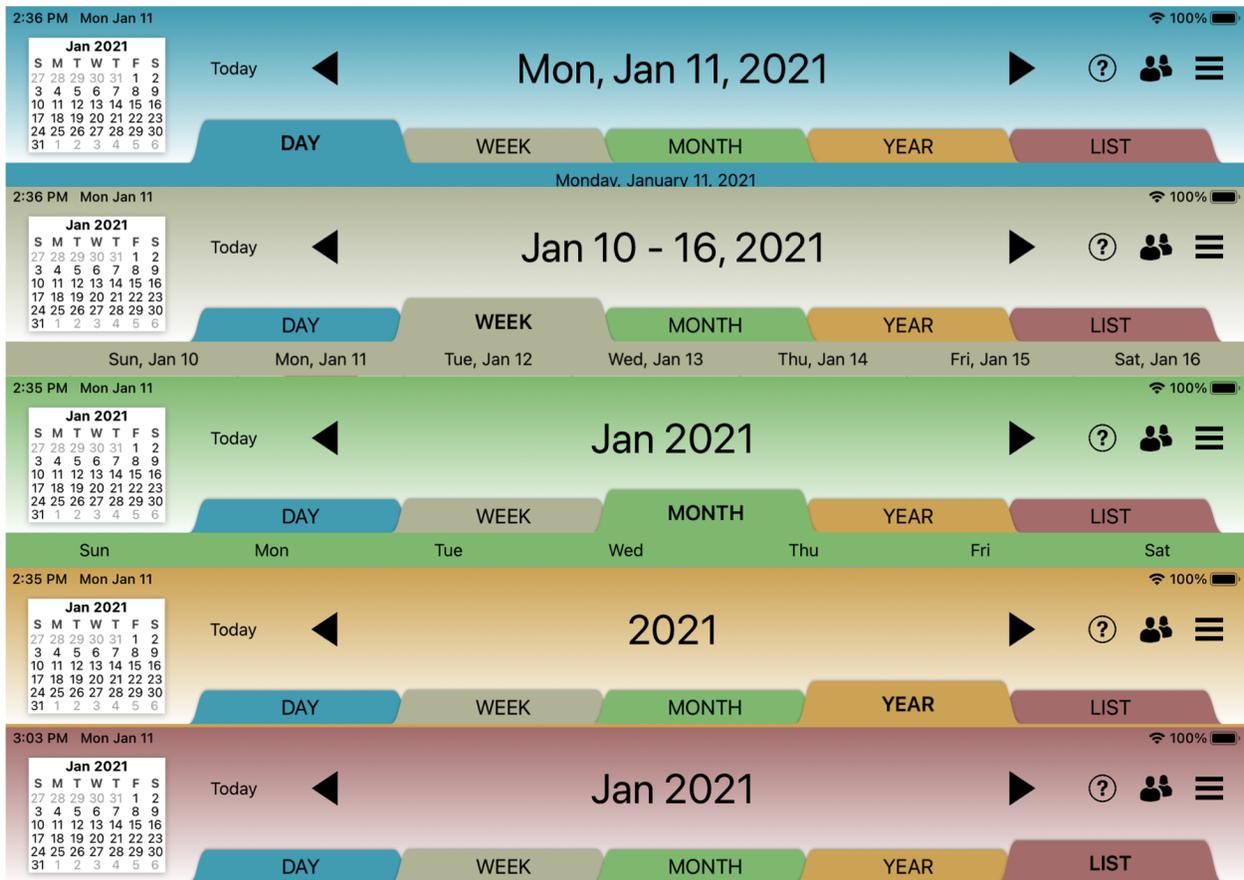
The Day View

The Day View shows a whole day in detail. This is one of two views where an Appointment can be directly scheduled and changed.

Tapping and holding anywhere within the calendar grid will bring up the Appointment Entry Form (see How to Make an Appointment section).
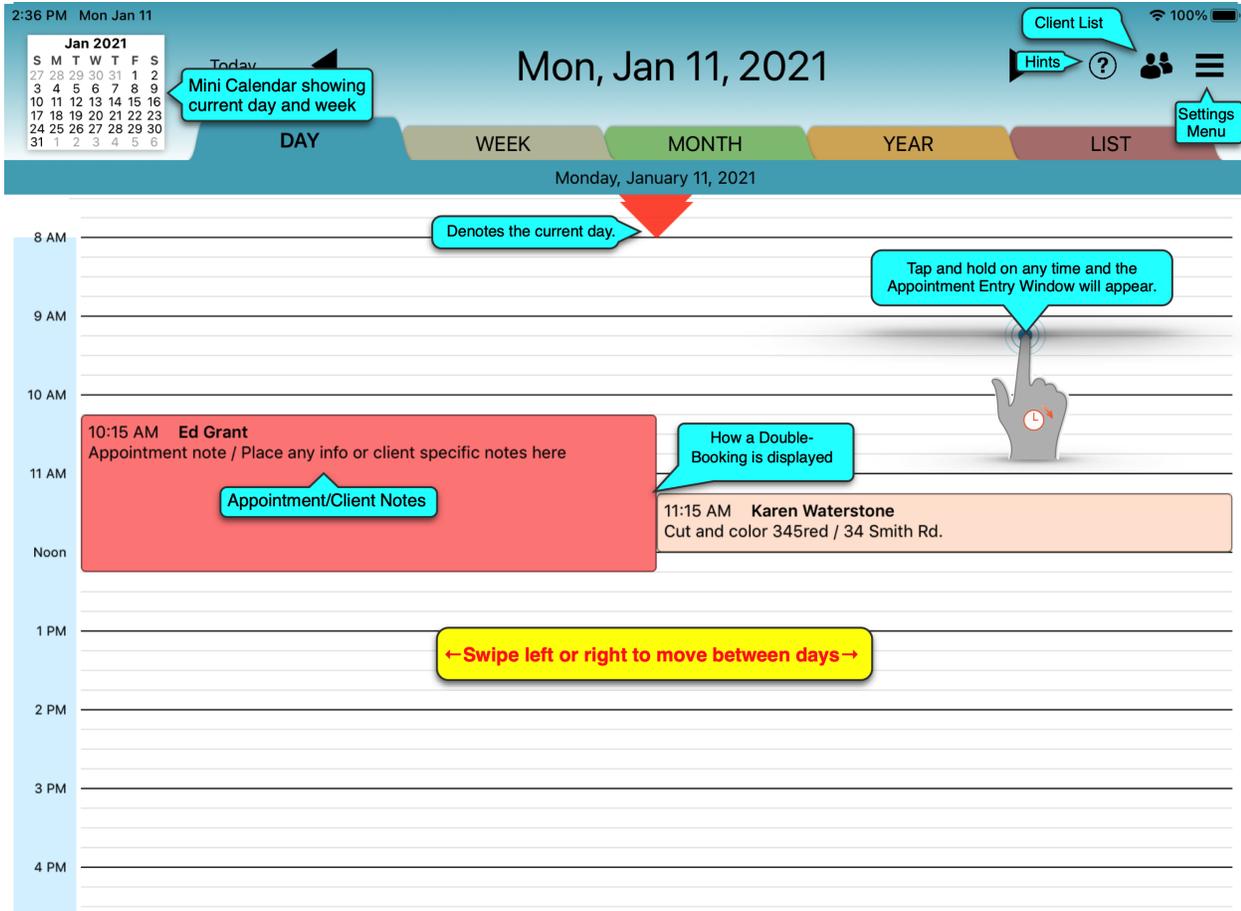
The Week View

The Week View shows all Appointments for any week. All the features in the Day View work in this view. This view is really seven Day Views, so all of the capability of the Day View works in the Week View.

The Month View

The **Month View** shows all Appointments for any month. Tapping on any "Day Square" will shift you to that day in the Day View.

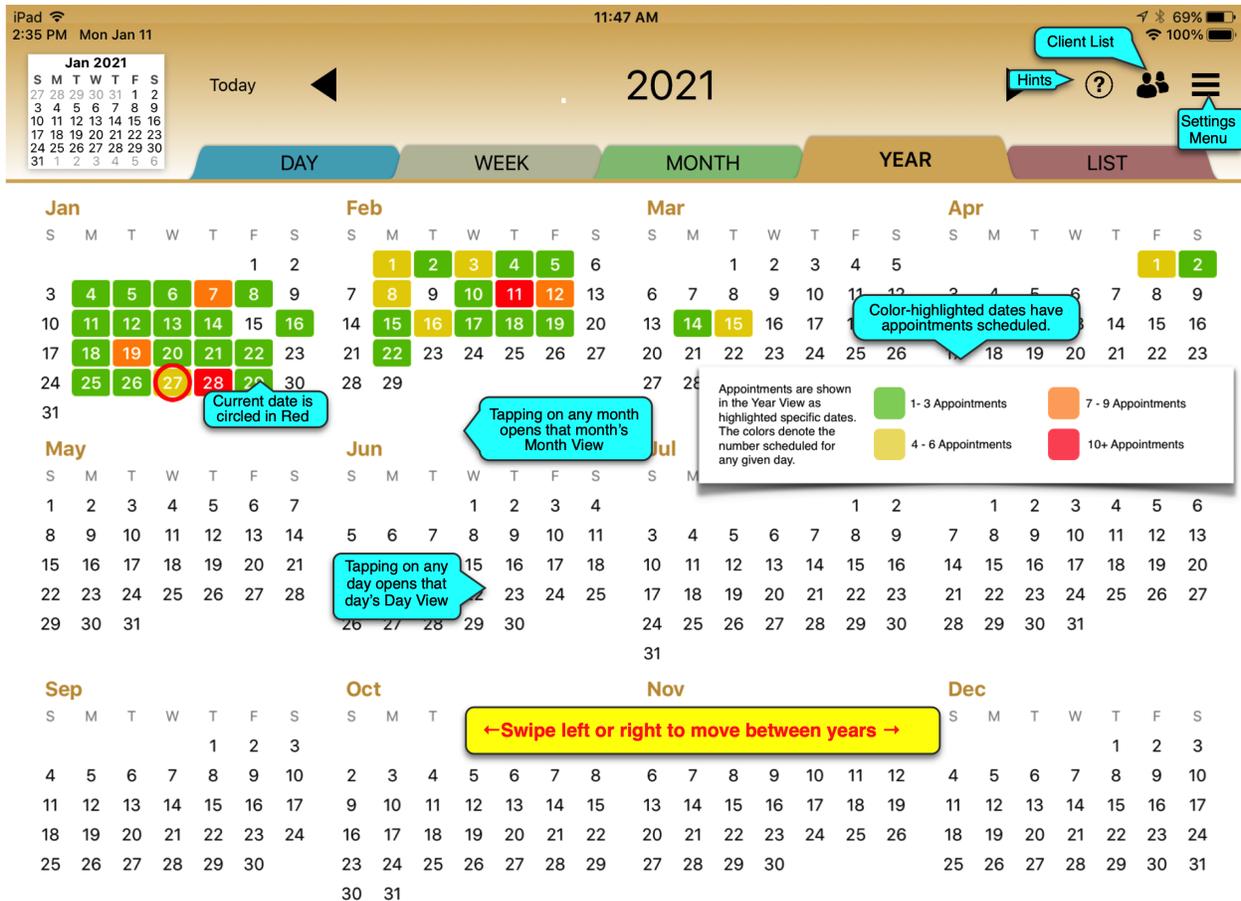# *The Year View*

The **Year View** shows all Appointments for any year. The number of Appointments on any given day is color-coded to assist in seeing your busy days.Tap on any day and the Day View for that Day is opened.

The List View

The **List View** shows all Appointments in an infinitely scrolling list. These are color-coded to indicate past (green), present (red) and future (yellow) Appointments. Here any Appointment's time and length can be edited, emails can be composed and new appointments made.
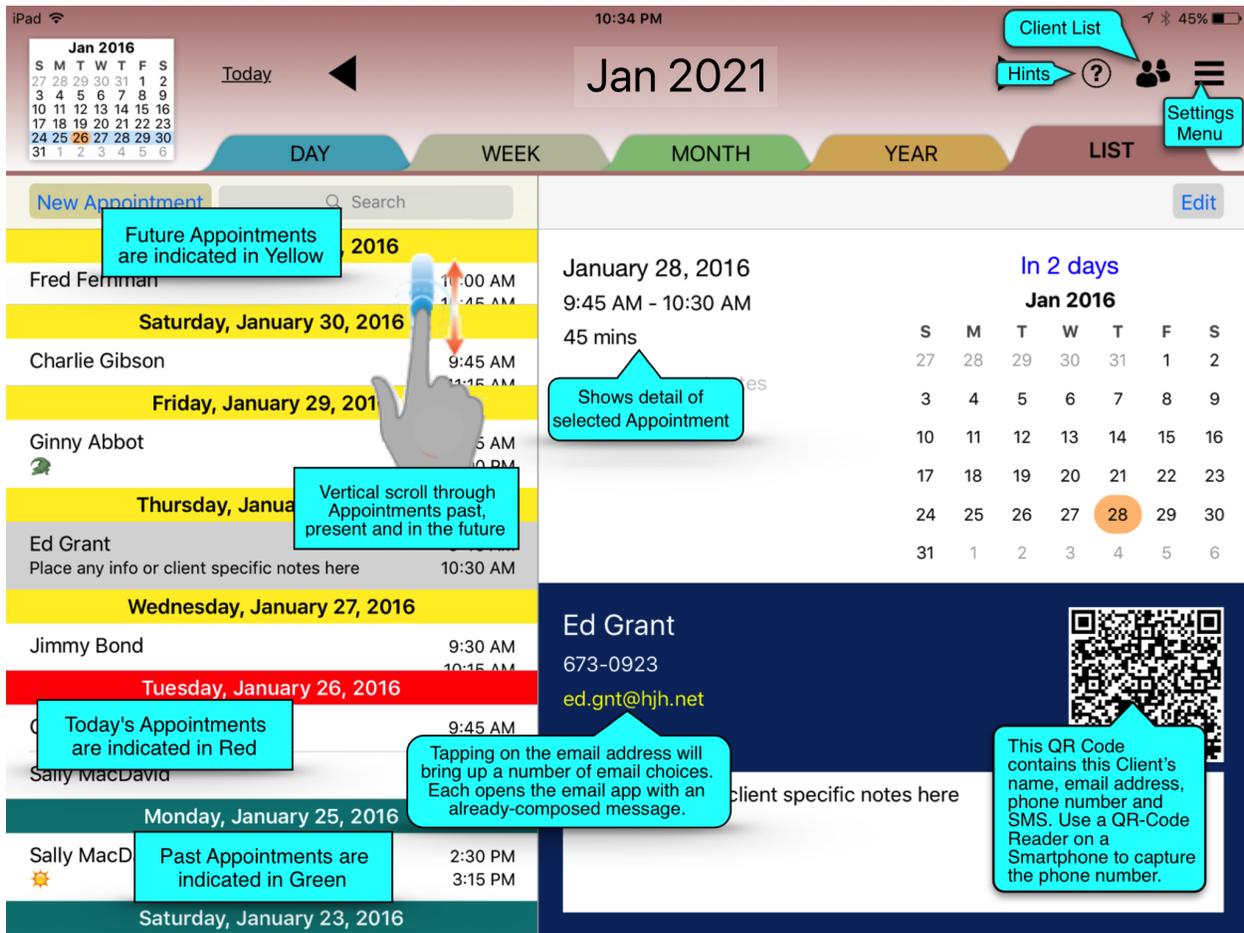
Rendezvous iPad Settings Menu ☰

The Settings Menu is where Rendezvous customization is determined. Tap on the Settings Menu icon in the right-hand corner and the Settings Menu will slide out from the left. Here are of the custom setting menus for all of Rendezvous' features.
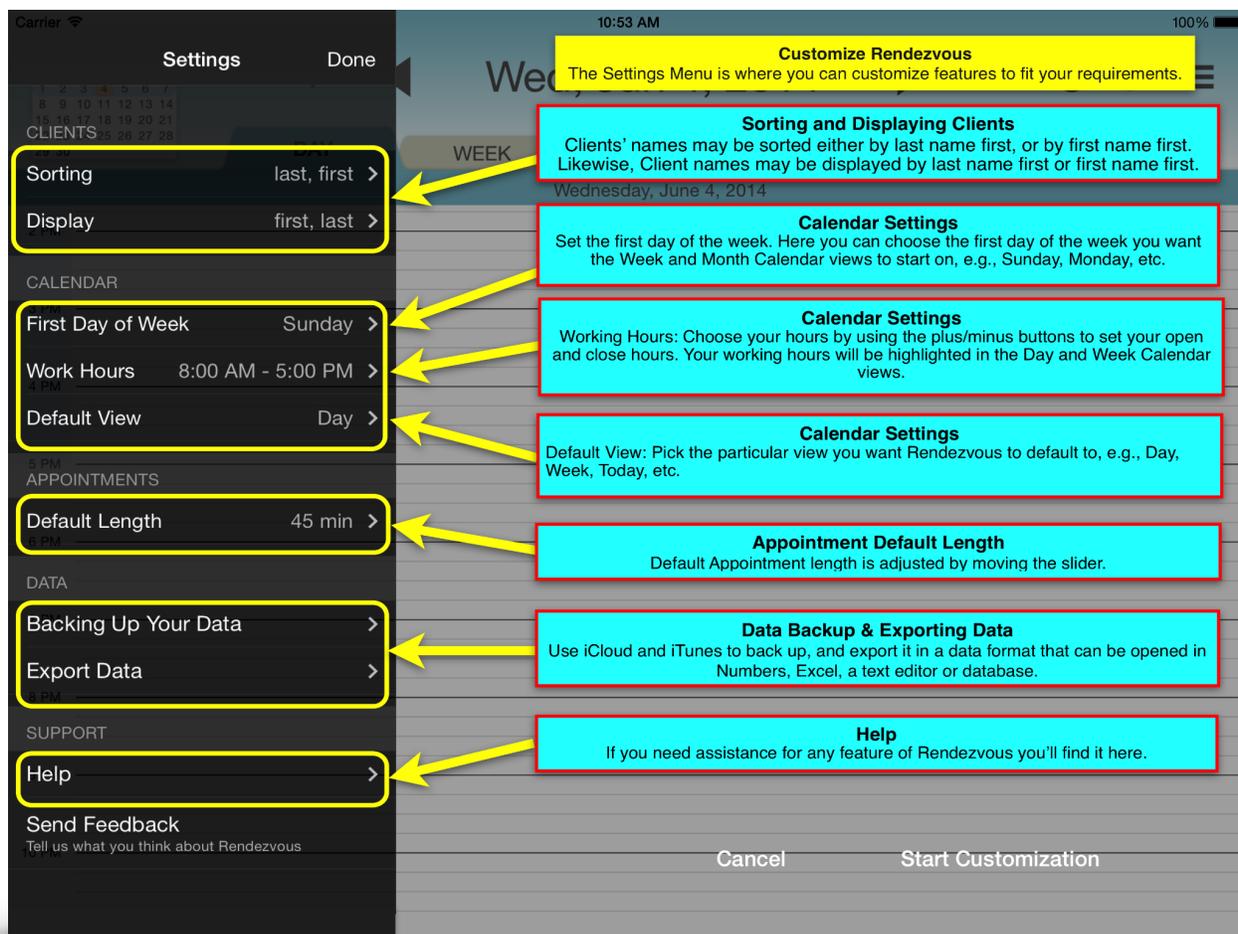
Carrier 🛜   10:53 AM   100% 🔋

| Settings | Done |

Customize Rendezvous
The Settings Menu is where you can customize features to fit your requirements.

CLIENTS

| Sorting | last, first > |
| Display | first, last > |

Sorting and Displaying Clients
Clients' names may be sorted either by last name first, or by first name first. Likewise, Client names may be displayed by last name first or first name first.

CALENDAR

First Day of Week	Sunday >
Work Hours	8:00 AM - 5:00 PM >
Default View	Day >

Calendar Settings
Set the first day of the week. Here you can choose the first day of the week you want the Week and Month Calendar views to start on, e.g., Sunday, Monday, etc.

Calendar Settings
Working Hours: Choose your hours by using the plus/minus buttons to set your open and close hours. Your working hours will be highlighted in the Day and Week Calendar views.

Calendar Settings
Default View: Pick the particular view you want Rendezvous to default to, e.g., Day, Week, Today, etc.

APPOINTMENTS

| Default Length | 45 min > |

Appointment Default Length
Default Appointment length is adjusted by moving the slider.

DATA

| Backing Up Your Data | > |
| Export Data | > |

Data Backup & Exporting Data
Use iCloud and iTunes to back up, and export it in a data format that can be opened in Numbers, Excel, a text editor or database.

SUPPORT

| Help | > |

Help
If you need assistance for any feature of Rendezvous you'll find it here.

Send Feedback
Tell us what you think about Rendezvous

Cancel   Start Customization

Sorting Order
Clients' names may be sorted either by last name first, or by first name first. Likewise, Client names may be displayed by last name first, or first name first.
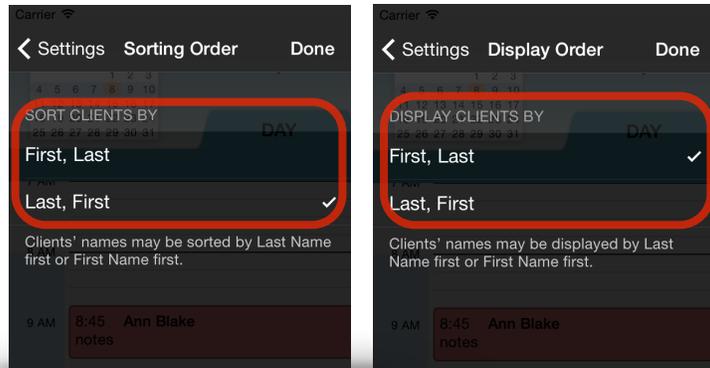
First Weekday
Set the days you work here (Monday to Friday, Wednesday to Saturday, etc).
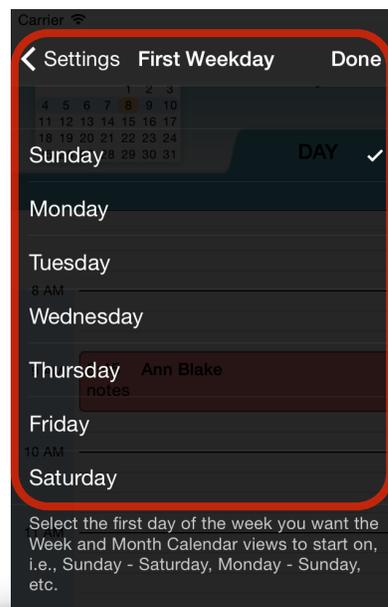
Work Hours
Use the +/- to adjust the times. As the beginning and closing hours are changed, the time period will be identified by a vertical colored bar on the left edge of the Day and Week views to denote your hours of operation.
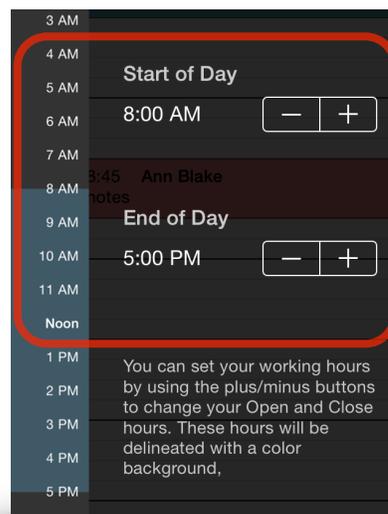
Calendar View Settings

In the Calendar View settings window you can choose which calendar view you prefer Rendezvous open to when launched. Your choices for a Default view are:

- Today in the Day View (which is the default view)
- Week View (defaults to current week)
- Month View (defaults to current month)
- List View
- Where you left off…
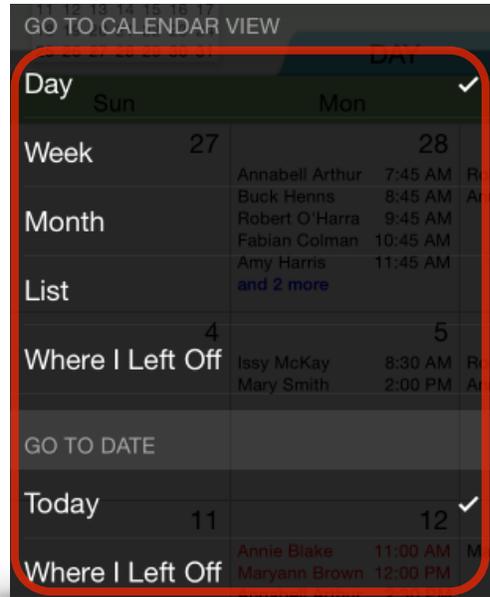
Appointment Duration Setting

The Appointment duration default is set at :45 Min. To change the Appointment length open Settings > Appointment Length and use the slider to add or reduce the time period by :15 Min intervals. If an Appointment has to be longer or shorter use the +/- to adjust as needed.
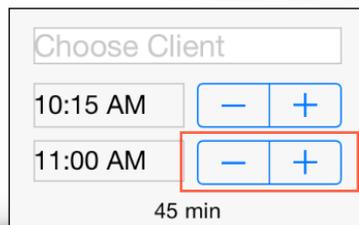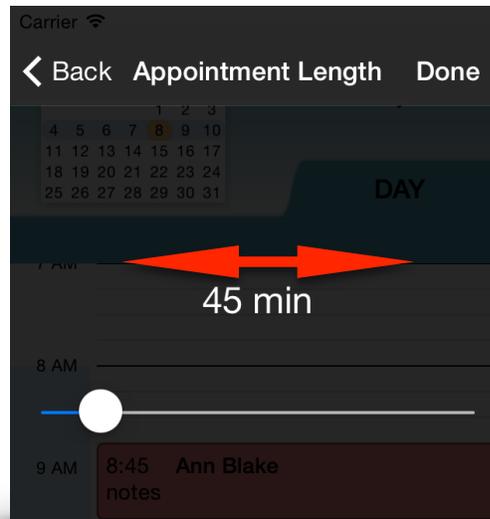
iCloud and iTunes Backups
To back up your Appointments and Client List to iCloud, make sure that you have set up your iCloud account, are logged in and have set iCloud to collect Documents and Data. Or, use iTunes by either connecting your iPad to your Mac or PC or use WiFi sync to fully back up your iPad (see: http://support.apple.com/kb/ht1766).

Export your data
To export your data, select one of the three choices and the "Compose Email" window opens. You can then email the already attached comma separated value (CSV) file to yourself. The CSV file can then be opened in Numbers, Microsoft Excel, a text editor or a database.

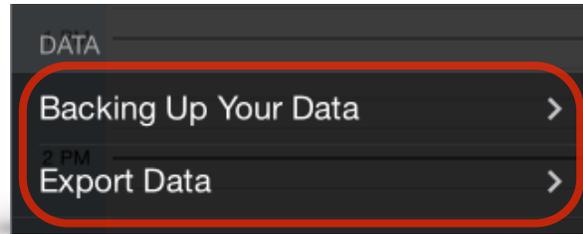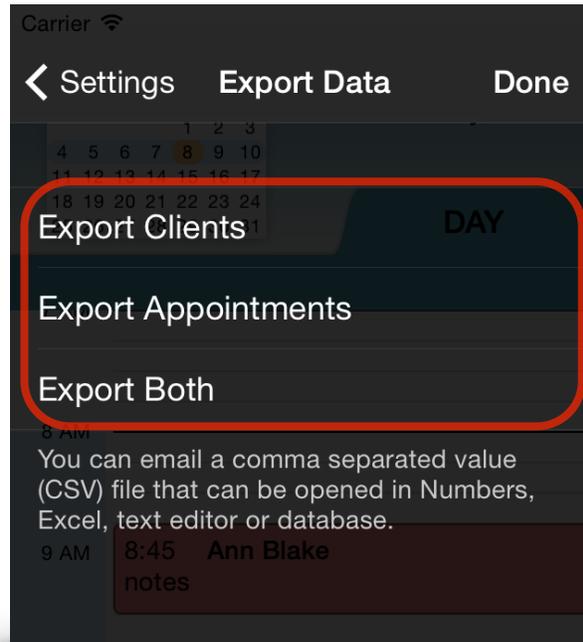| Date	Start time	End time	First Name	Last Name	Phone Number	email Address
04-01-2014	9:00 AM	9:45 AM	Pat	Adams	444-5454	tedadams@cl.rr.com
04-01-2014	10:00 AM	12:00 PM	George	Gleason	291-0087	
04-01-2014	11:00 AM	11:45 AM	Matt	Baxter	325-6426	
04-02-2014	5:15 AM	6:00 AM	Carol	Brewer	875-1336	iaom@cox.net
04-02-2014	7:45 AM	8:30 AM	Sam	Roberts	677-6900	oingal@gmail.com
04-02-2014	8:30 AM	10:45 AM	Warren	McKennsey	388-6145	
04-02-2014	9:00 AM	9:45 AM	George	Gleason	291-0087	
04-02-2014	10:45 AM	11:30 AM	Mike	Williams	453-0945	
04-02-2014	12:15 PM	1:00 PM	Pat	Adams	444-5454	tedadams@cl.rr.com
04-02-2014	7:00 PM	7:45 PM	David	St. Tizzie	272-9299	aygt@gmail.com
04-03-2014	8:30 AM	9:15 AM	Pat	Adams	444-5454	tedadams@cl.rr.com
04-03-2014	9:30 AM	10:15 AM	Dana	Rothman	899-7320	danaroth1man@gmail.com

Gestures Used

These are the various swipes and gestures that Rendezvous uses to navigate:
- **Tap and Hold** (long press) launches the Appointment Entry Form when in the Day View or Week Views.
- **Double Tap** on an Appointment in the Day or Week view opens an Edit Appointment Form.
- **Single Tap** on an existing Appointment in the Day or Week view will "lift" the Appointment from the calendar to place it on another date. A Single Tap on a date in the Month or Year view will open that day in the Day View.
- **Swipe/Flick/Pan** (left or right) to go to previous or next date unit.

GESTURES USED IN RENDEZVOUS

TAP AND HOLD	DOUBLE TAP	SINGLE TAP	VERTICAL SLIDE	SWIPE/FLICK
Tap and hold on a start time anywhere in the Day or Week view to open the Appointment Entry Screen	Double-tap on an Appointment to open the Edit Appointment screen.	Tap on an existing Appointment to move it to another date.	Scroll through your Client, Contact Lists and Appointment History	Swiping left or right in the Day, Week, Month or Year view will move to previous, or next date

New Clients may be added in either the "Make an Appointment" form, or in the Client List. Tapping on the **Add Client** button on either of these screens will bring up the New Client entry form on the left and, if you have selected to access your Contacts, those will be listed on the right.

Type in the New Client's information or select from your Contacts List on the right. If a Contact from the list is selected, the Contact's information - email and phone number - will be imported too. Tap on **Save** when done.
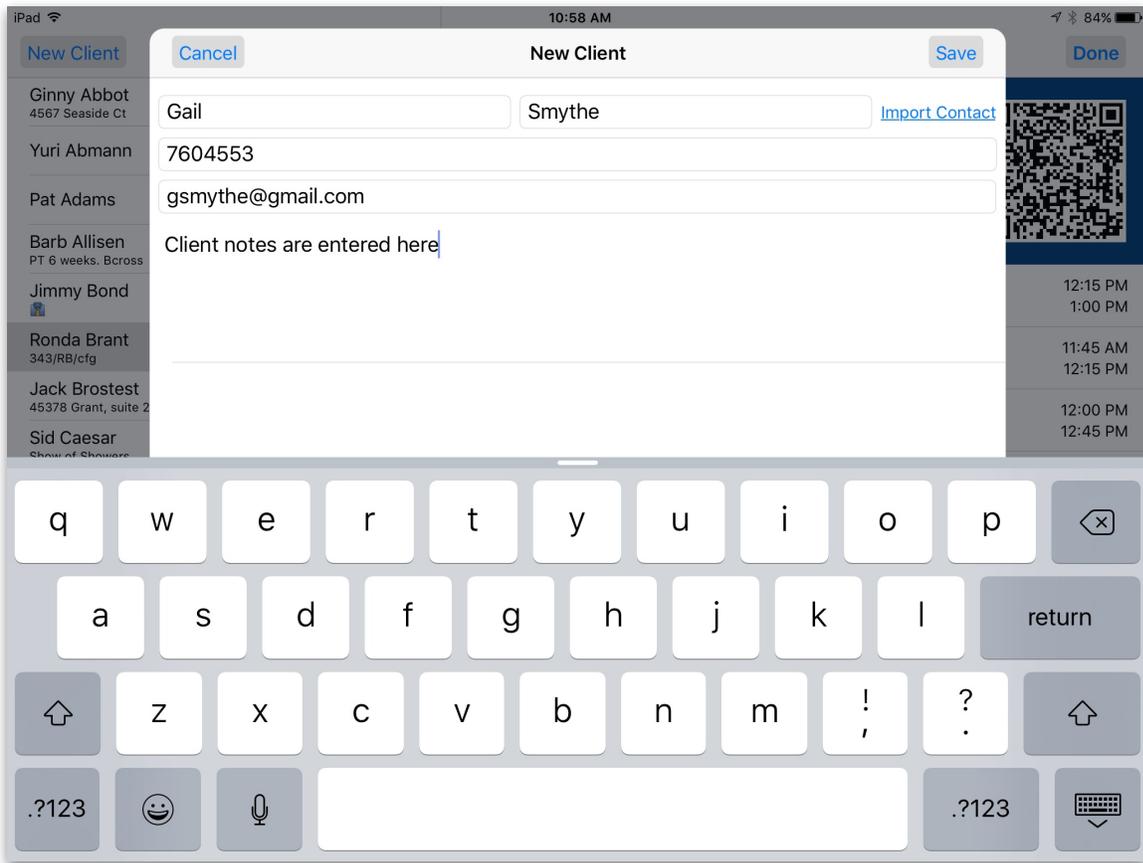
Editing a Client's Record
A Client's information can be edited in the Client List. Select the Client's name to be edited and the details of the Client will open. Tap on the **Edit** button and the editing screen will appear along with the keyboard. Make the changes and tap on **Save**.
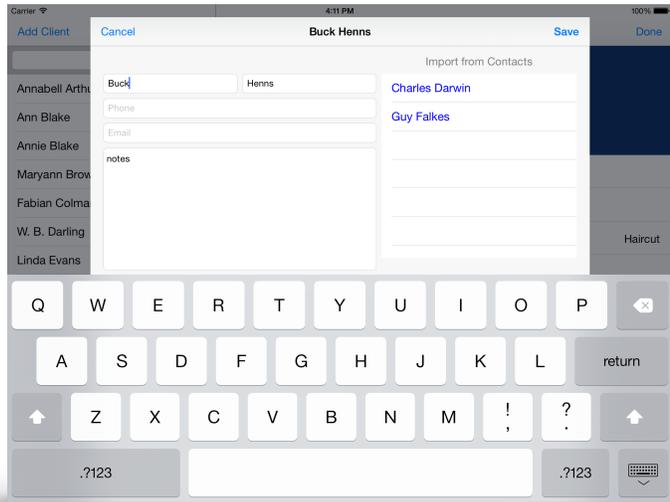
Maintaining your Client List
The Client List shows all your clients in the order you set for sorting and viewing the list, by last name, or by first name. Here you can edit all Client information.
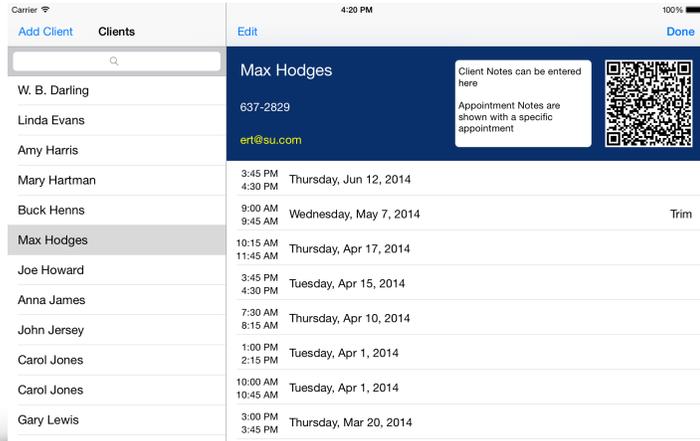
Deleting a Client To delete a client, select the Client record to be removed and swipe to the left. A Red Delete button will slide out; tap on it to remove the Client record. A warning will appear asking you to confirm the deletion.

DELETIONS CANNOT BE UNDONE!
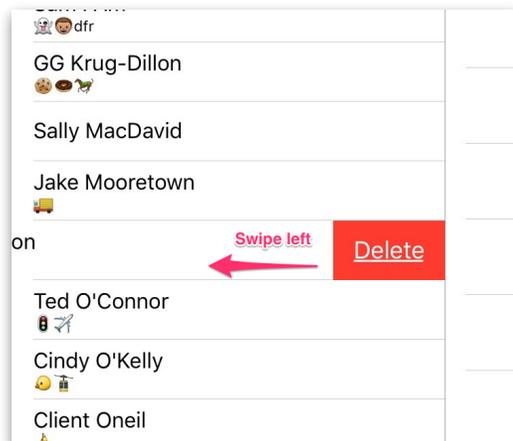
## *An Appointment Can Be Made With Just Two Taps.*

Rendezvous Appointment-making steps mimic how appointments are typically scheduled using a traditional week or day planner. Scheduling an appointment needs to start with the appointment calendar. The first interaction between the user and a new or existing client is: When do they want to come in? An immediate view of the calendar on the day requested will show what's available. If the day and time are agreed upon, the Client's name is selected and the Appointment is made.

From the Day View

Go to the day you want to set an Appointment, tap and hold on the desired time anywhere within the date grid. The Appointment Entry Form will slide up with the Client List. There are a two ways to enter a Client's name - either by typing the name, or scrolling through the Clients in the list, and tap on your selection. In either case the Client's name will then be in the Client field. Now, if the appointment start time and duration are correct, tap Save and the appointment is set.
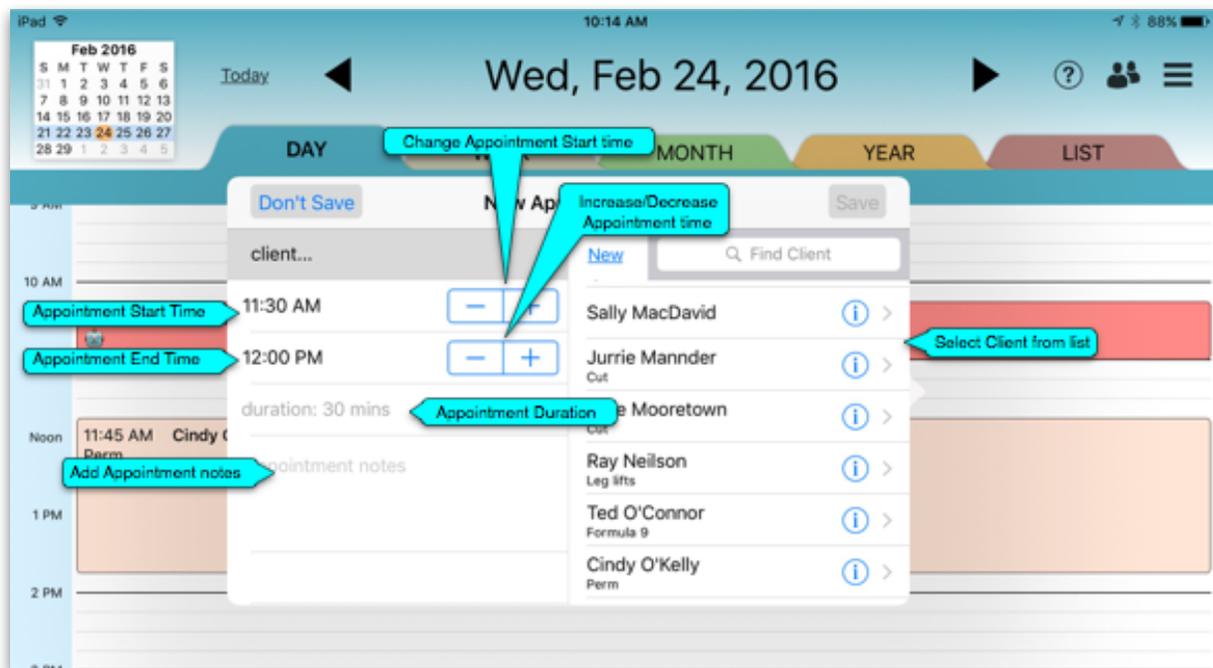
From the Week View

The setting of an Appointment in the Week View is essentially the same as in the Day View. Tap and hold on the desired start time in the day "square" to bring up the Appointment Entry Form. This is the same entry window as is displayed in the Day View. Just select a Client and add a note if you want, tap on Save and the Appointment is set.
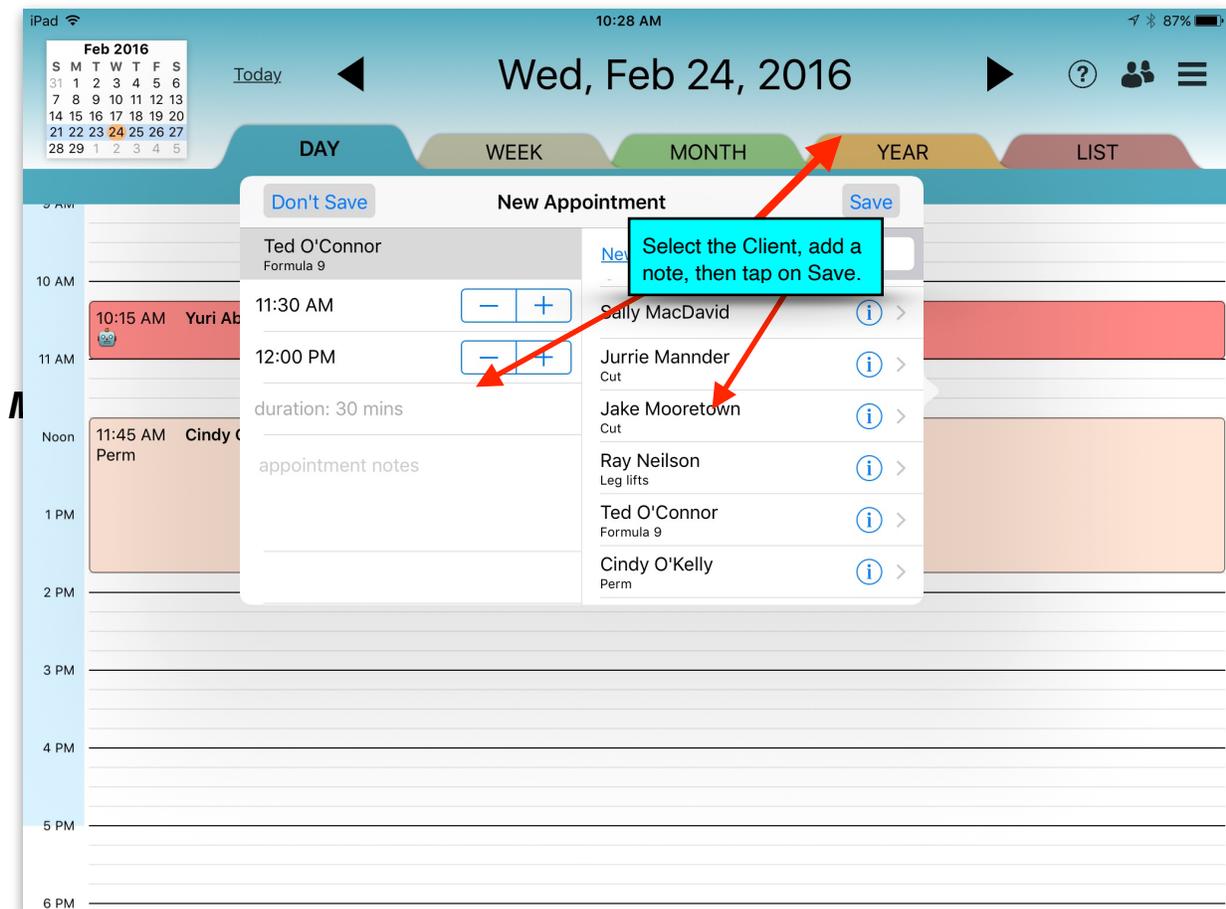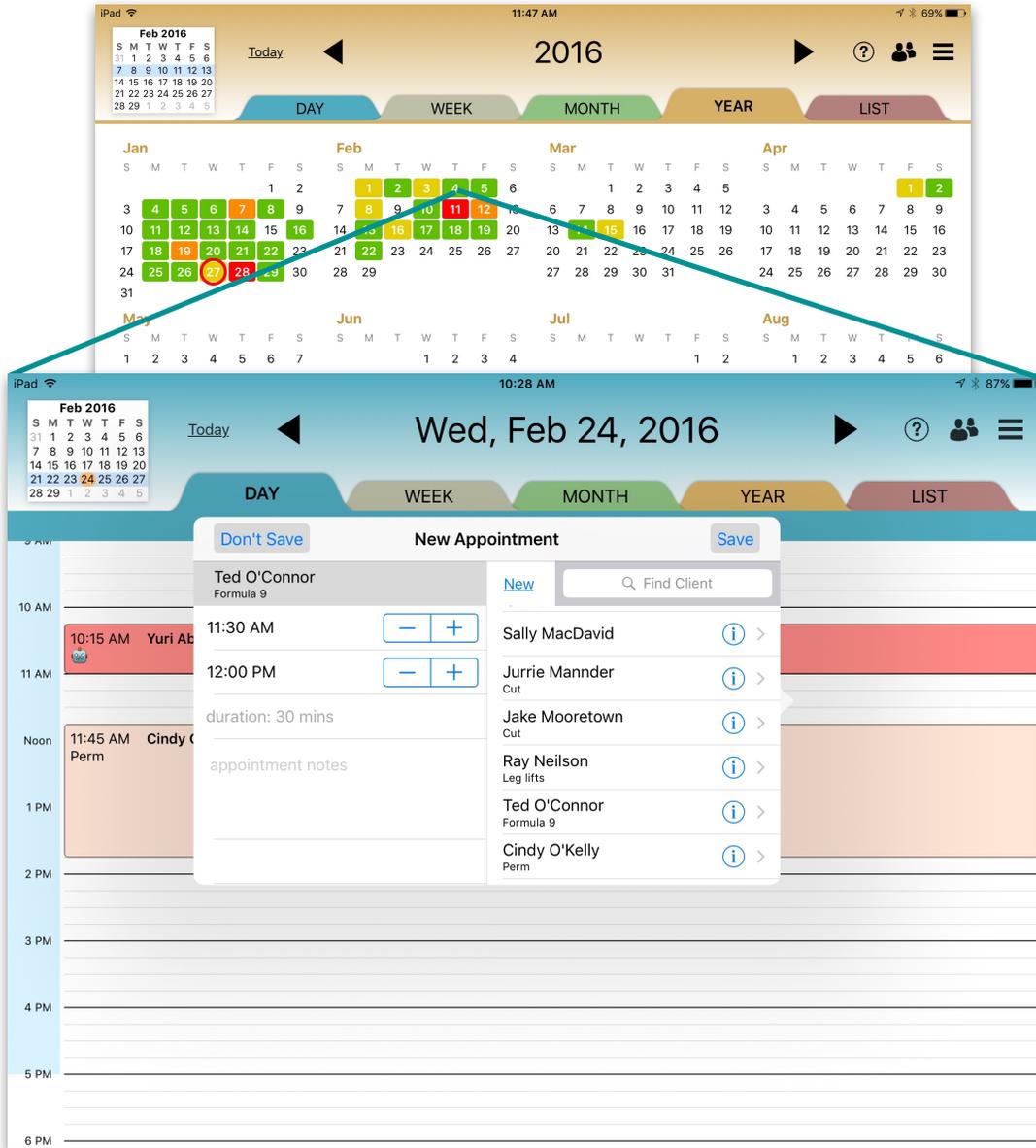
From the Month View

Tapping in the chosen day "square" will bring up the Day View for the selected day. Then tap and hold on a start time and complete the Appointment Entry Form. Tap Save.

From the Year View

Tapping on the desired day numeral will bring up the Day View for the selected day. Then tap and hold at on a start time and complete the Appointment Entry Form. Tap Save.

From the List View

n the List View, tap on "New Appointment" (on the upper left) to display the Appointment Entry Form, enter/select the Client, adjust the start time and duration, if necessary, add a note. Tap **Save**.
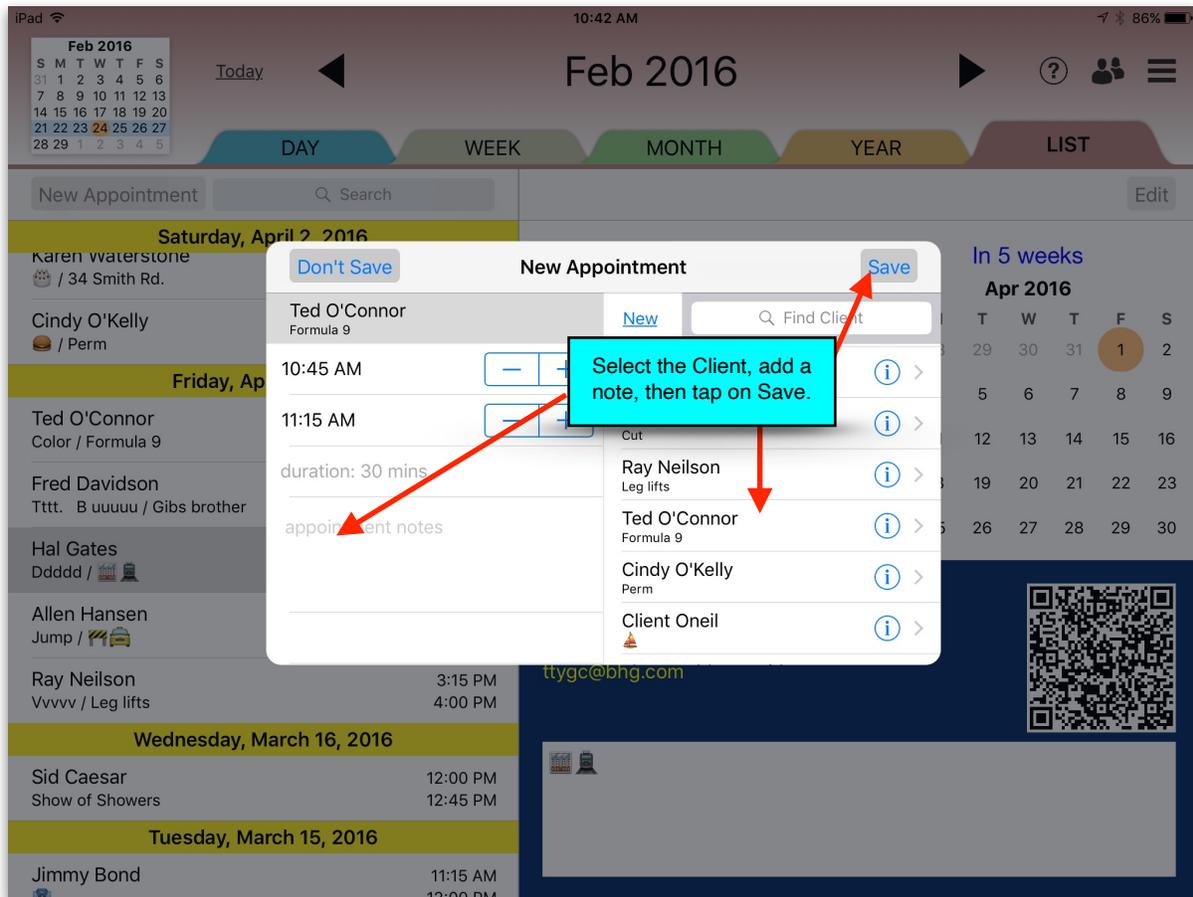
How to Double-Book Appointments

Rendezvous has a Double-Booking feature. You may set two (or more) Appointments at the same time.

A double-booking is set essentially identical to how a regular appointment is made. The only difference is instead of tapping and holding in the calendar grid, tap and hold in an existing appointment to open the Appointment Entry Form. Then select the Client, time and enter any notes, tap on **Save** and the Appointment is made. The new "double-booked" appointments will be shown within the same time frame and adjacent to each other.
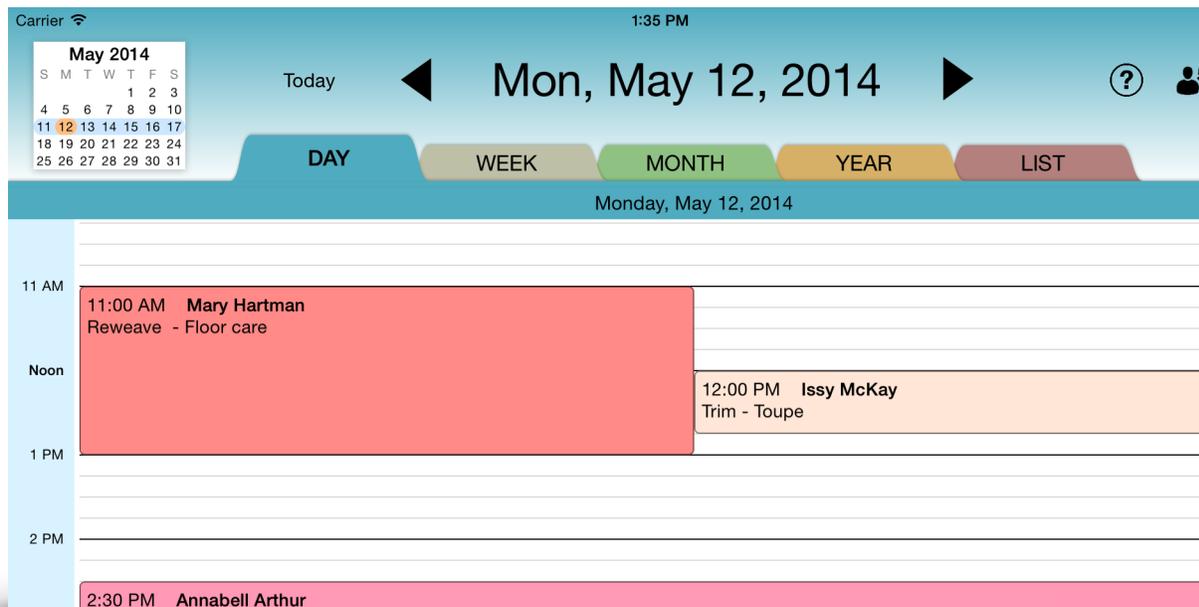
Changing an Appointment

Moving an Appointment

In either the Day or Week View, a single tap on an Appointment will lift it away from the calendar and hover above it. You can then either drag the floating Appointment to a new time on that day, or move the Appointment to a future date by dragging the calendar itself until the new date and time is located under the floating Appointment. Then tap on the Appointment and it will drop onto the new time/date. The changed Appointment detail will then be displayed so you can edit if necessary.
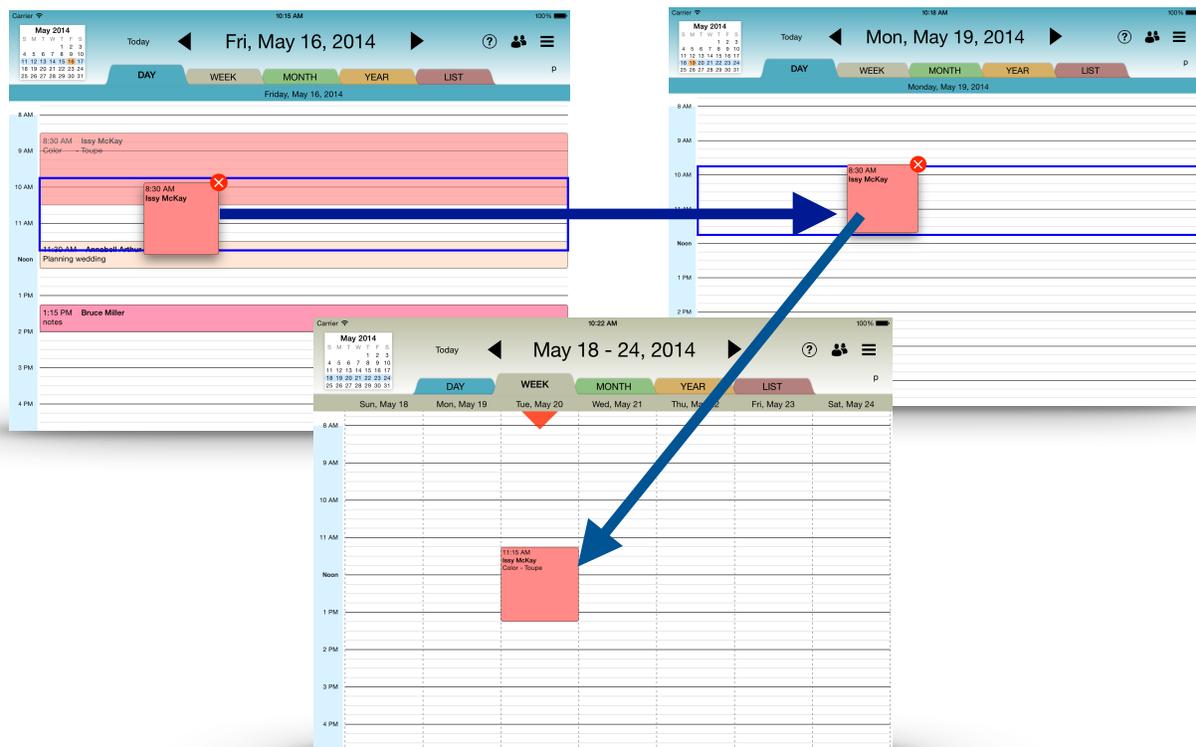
Changing an Appointment *continued*

In the Day or Week view, Appointment times, duration and Notes can be changed by double-tapping on the Appointment to be modified within that day. Here the time and duration of the Appointment can be modified, and the Notes can be changed. Or, the Appointment can be canceled.
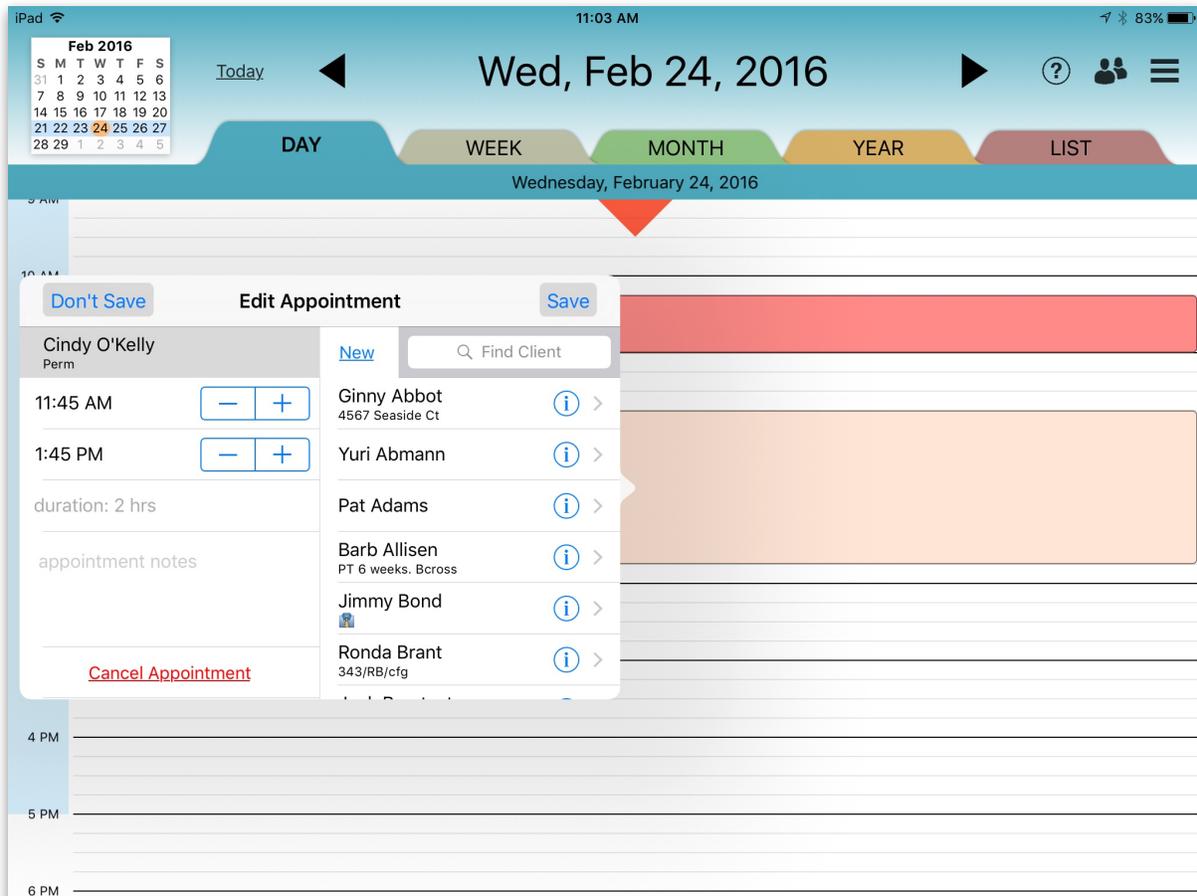
Using QR Codes to Contact Clients

Each Client's information can be displayed by tapping the Client List icon in the upper right-hand of the screen. Here you will see the client's name, phone number and email address, the Notes and a QR Code. The QR Code contains the Client's name, phone number and email address so you can use a QR Reader App on your smartphone to capture and display the information contained in the code. Then using the QR Reader App, tap on the phone number or SMS (text) number to call or text your Client or send an email. No need to manually enter the information onto your phone.

Email messages can be sent to a Client to either remind them of an upcoming appointment or that their appointment needs to be changed or canceled.
Emails are sent directly from the Mail app. Select the Client to receive the email, tap on the email address and select the subject of the email (Appointment Reminder, Appointment Canceled, Appointment Change, or Reminder). The Compose email window will be opened with the Client's address information filled in along with some brief messages. If the message is sufficient, tap on **Send**, or add additional information and then send. The sent email will be saved in your Sent folder.
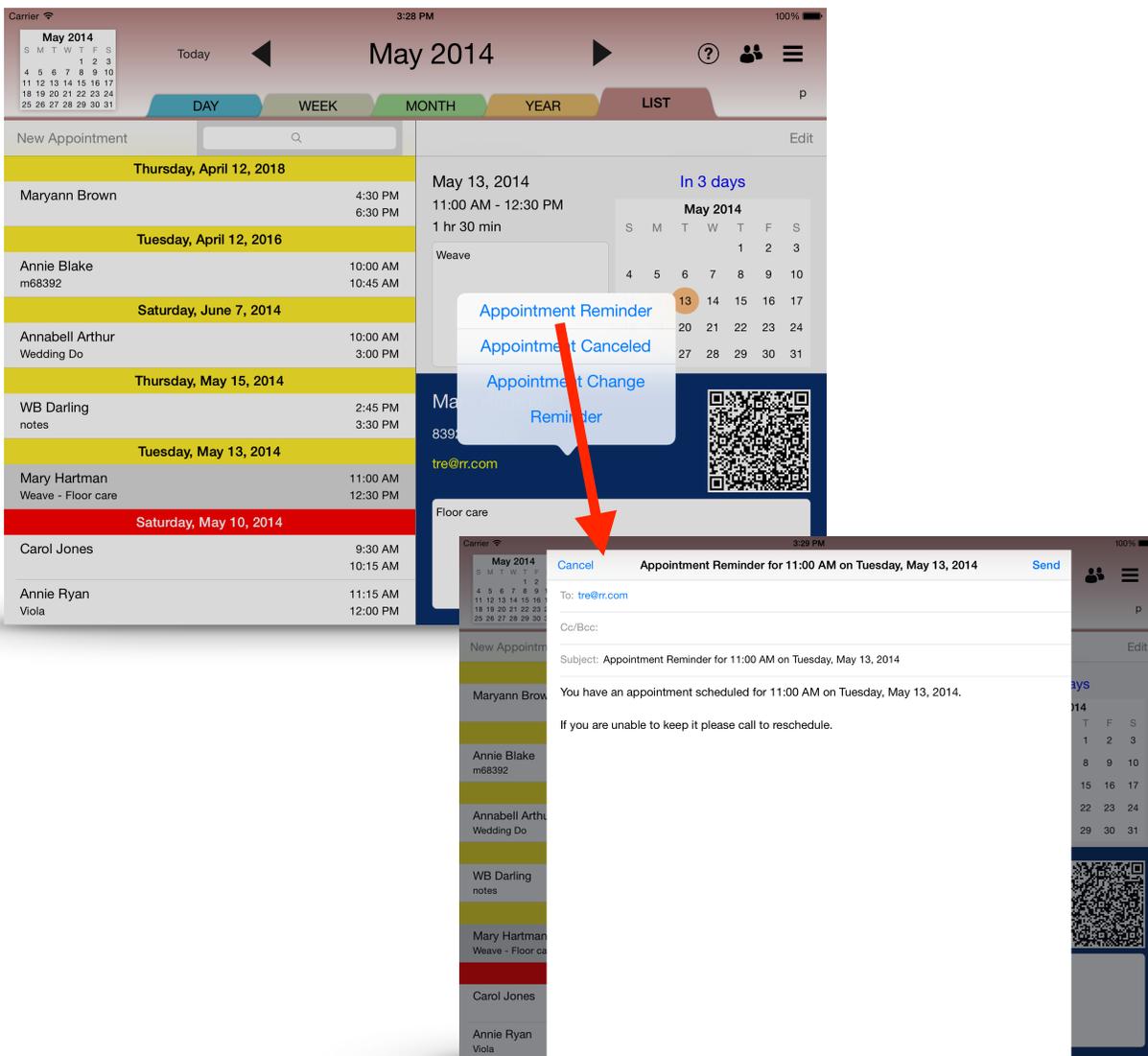
Using Notes

The Notes field that accompanies each Client's record can be used for any information that you want, from hair coloring formulas, fitness plans, student tutoring notes, to musical instrument instruction exercises. Two types of Notes are provided:

- The Client Note (entered when adding a new Client): This can be used to further identify the Client and other information pertaining to the Client.
- The Appointment Note (entered when making the appointment): This is where to enter specific service information needed for a specific appointment.
- These notes are displayed within an appointment "box" in the Day, Week and List views providing there is sufficient room, otherwise the notes will be truncated. Notes can be edited and/or deleted.

Rendezvous
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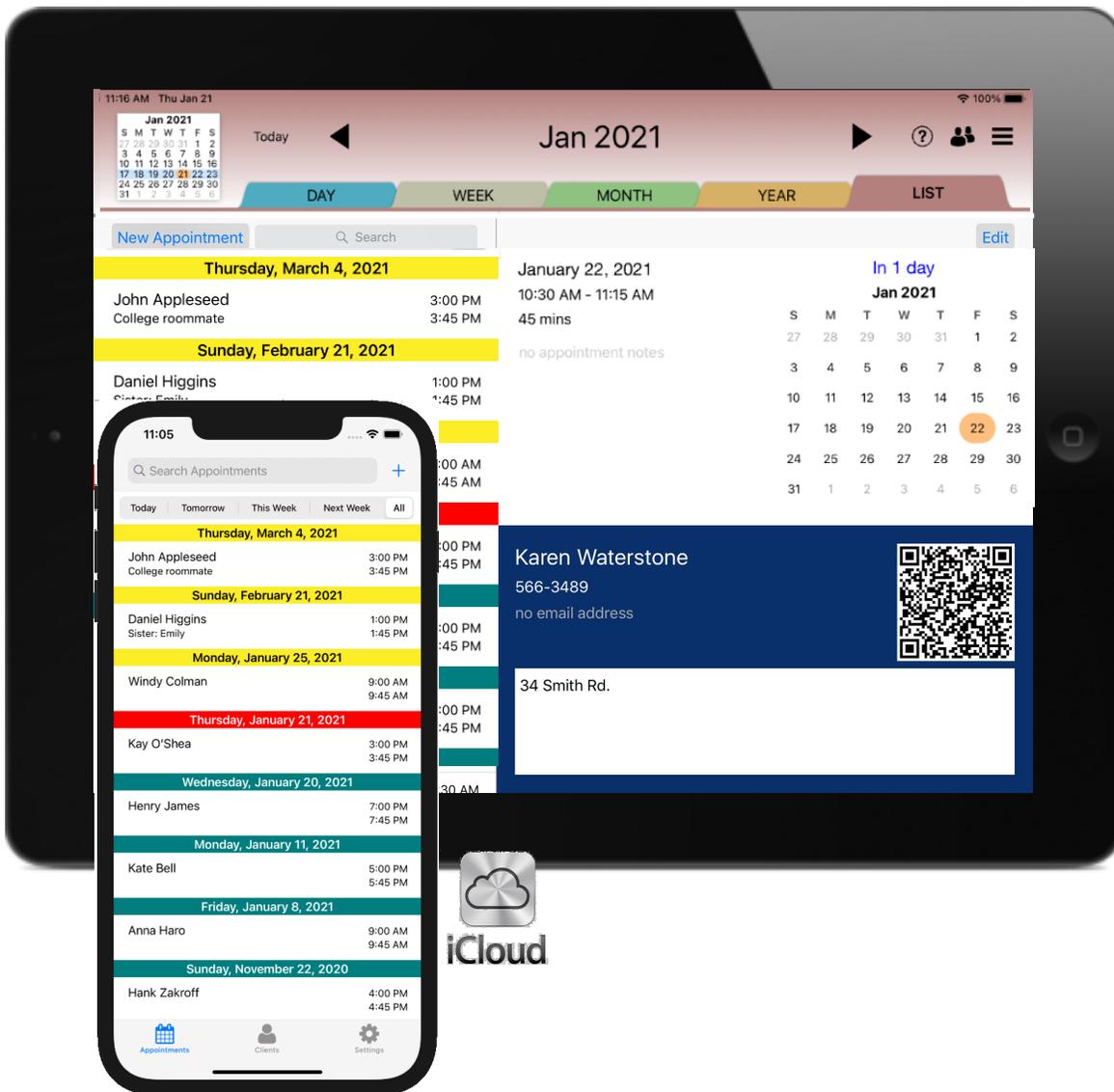
The iPhone version is the mobile equivalent of Rendezvous on the iPad. It provides many of the same features, so if you are away from your place of business, shop or salon you can still see all your appointments and clients, as well as make, move, or cancel appointments. These actions will automatically be synced to your iPad through your iCloud account.

Appointment List 📅

The Rendezvous iPhone version has two screens - Appointment and Clients, plus a Settings/Help menu.
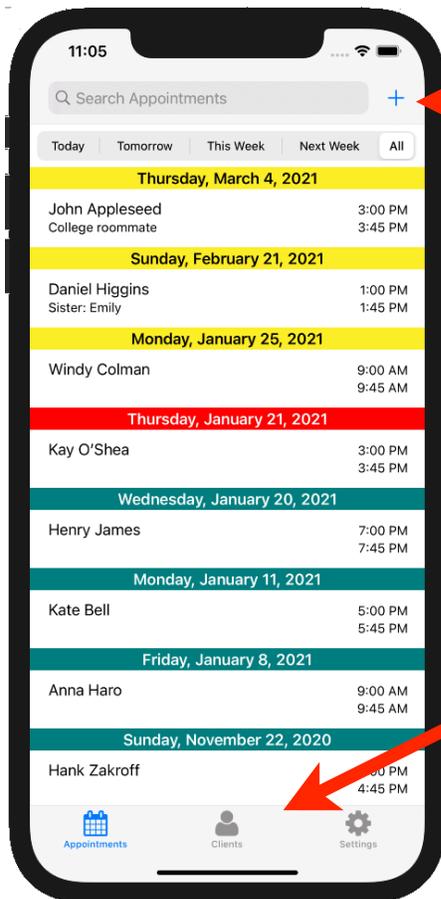
Tap on the **+** to create a new appointment.

| Today | Tomorrow | This Week | Next Week | All |

For easier viewing, appointments can be restricted to:
Today, **Tomorrow, This Week** or **Next Week**
And, see **All** appointments past, current and in the future.

These Buttons link to Appointments, Clients and Settings

Making an Appointment

Tap on the "+" in the upper right of the Appointment screen.
The appointment date selection screen will slide in, showing the current day highlighted in the month calendar. Below the calendar will be a list of all of the appointments for the current day. Tapping on any day will display that day's schedule. Or, swipe left to go to the next month.Tap on the day of the new appointment and then tap **Next**.

Tap NEXT

Pick a Date

Pick a Start Time and tap Next

Select a Client

Now add any appointment notes and tap Save
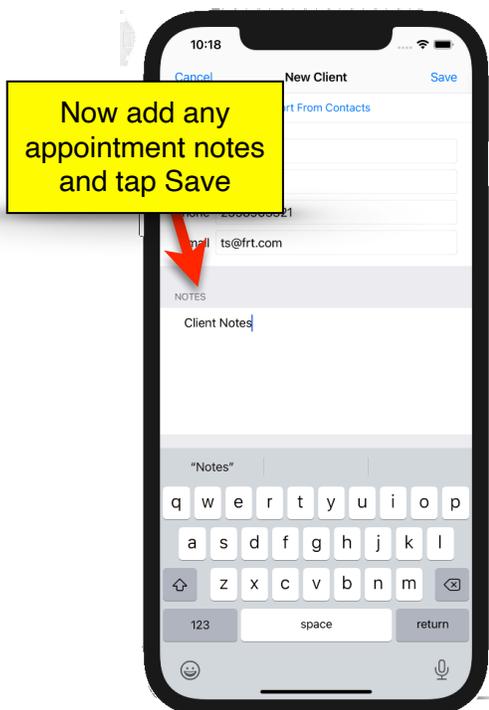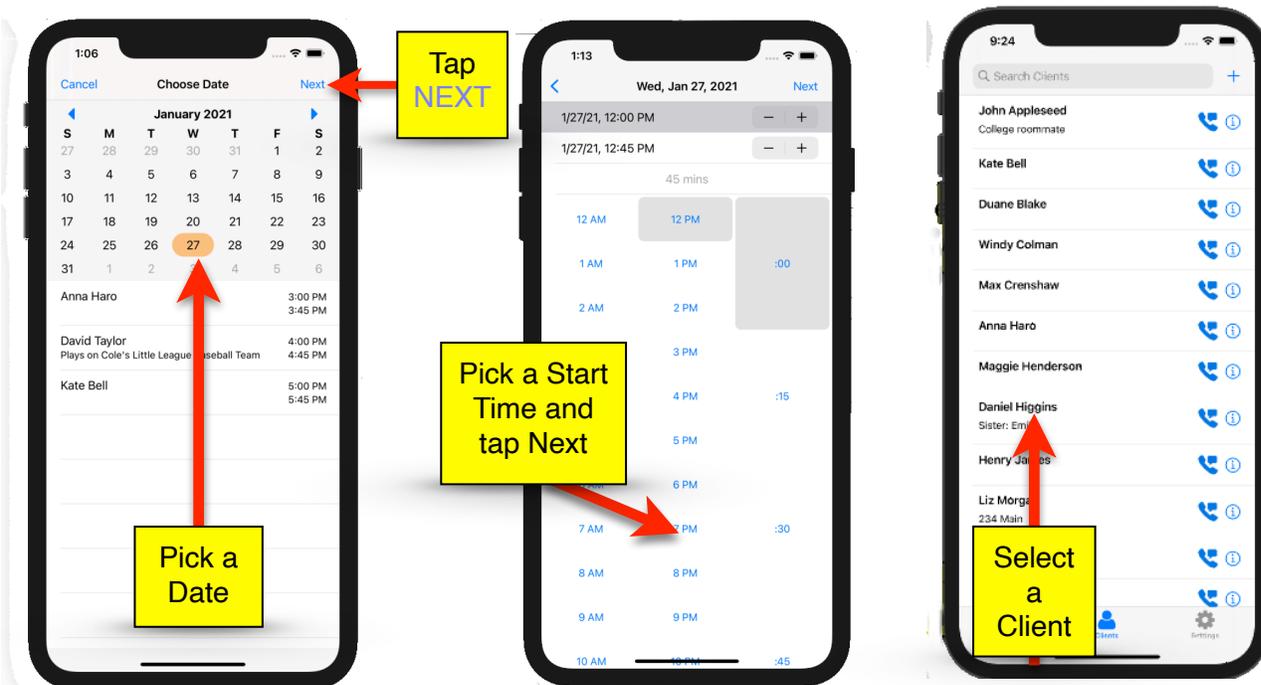
Using Notes

The Notes field accompanying each Client's record can be used to put in any information you want, from hair coloring formulas, fitness plans, student tutoring notes, to musical instrument instruction exercises. Two types of Notes are provided:

- The Client Note (entered from the Client List): This can be used to place any information pertaining to the Client, such as an address.
- The Appointment Note (entered when setting up an Appointment): This is where to enter specific service information needed for this specific Appointment.

These Notes are displayed within an Appointment "box" in the Day, Week and List views (Appointment Notes / Client Notes) providing there is sufficient room. Notes can be edited and/or deleted.

Client List 👥

This screen displays all clients along with the Client Notes, if there are any. The order in which they appear is set in Settings

Adding a Client:

Tap on the **+** to enter a new client.

Tapping on a client's name will present a list of all the client's appointments

Tap the ⓘ to edit client info.

Tap to import your Contacts

Manually enter clients

Add client notes and tap Save

Calling or Texting a Client

You can call or text your clients direct from the Client List by tapping on the phone/SMS icon to the right of the client's name. No need to go out of the app to call them. Just tap on the icon and select either Phone or Text. Tapping on Phone Call will place a call directly from Rendezvous. Likewise, tap on Text and the text message screen will appear. Type in your message and send. A copy will be placed in iMessages.

Tap on the 📞 to call or text a client.
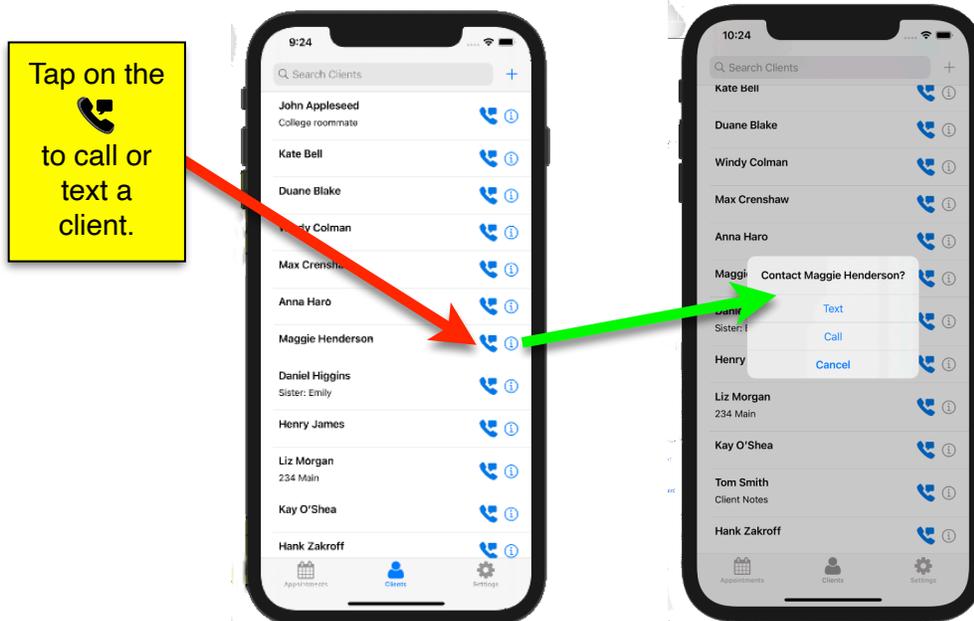
Settings ⚙

Customize Rendezvous

Client Sorting
Sort either by

Calendar

Appointment

Backup & Exporting Data

Help
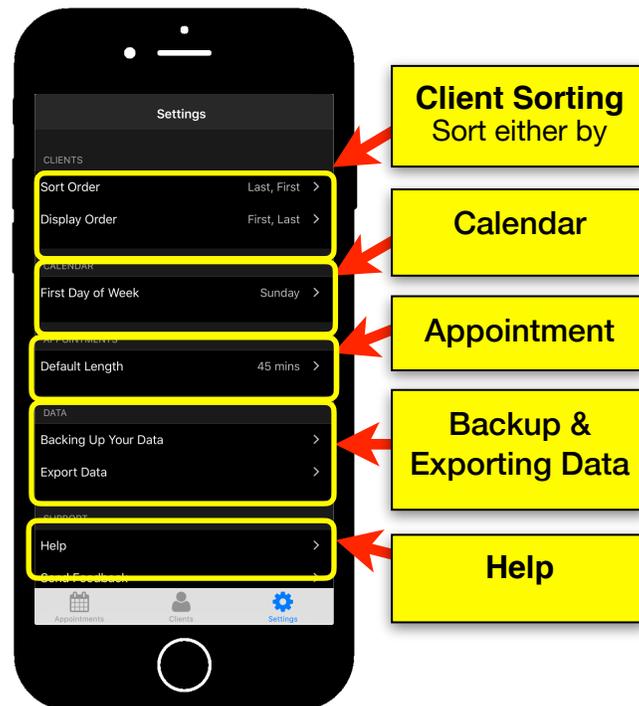
Rendezvous is now a Universal app, meaning that it works on both the iPad and the iPhone. Adding an iPhone version allows access to all appointments and clients without carrying along your iPad. You can see, change and add to your schedule on your iPhone and when you return to your iPad all of the additions and changes you made on your iPhone will appear automatically. Likewise, any appointments, changes, and client data done on the iPad will sync back to the iPhone.

But, in order for all the appointment and client information to match on both the iPad and the iPhone must be synchronized. This is done through your iCloud account. Any changes made on either device will sync through your personal and private iCloud account. If you don't have an account just sign up for one by going to Settings on either your iPad or iPhone and select iCloud. Here you will be able to create an iCloud account. Once created both devices must be logged onto iCloud and iCloud Drive turned on.
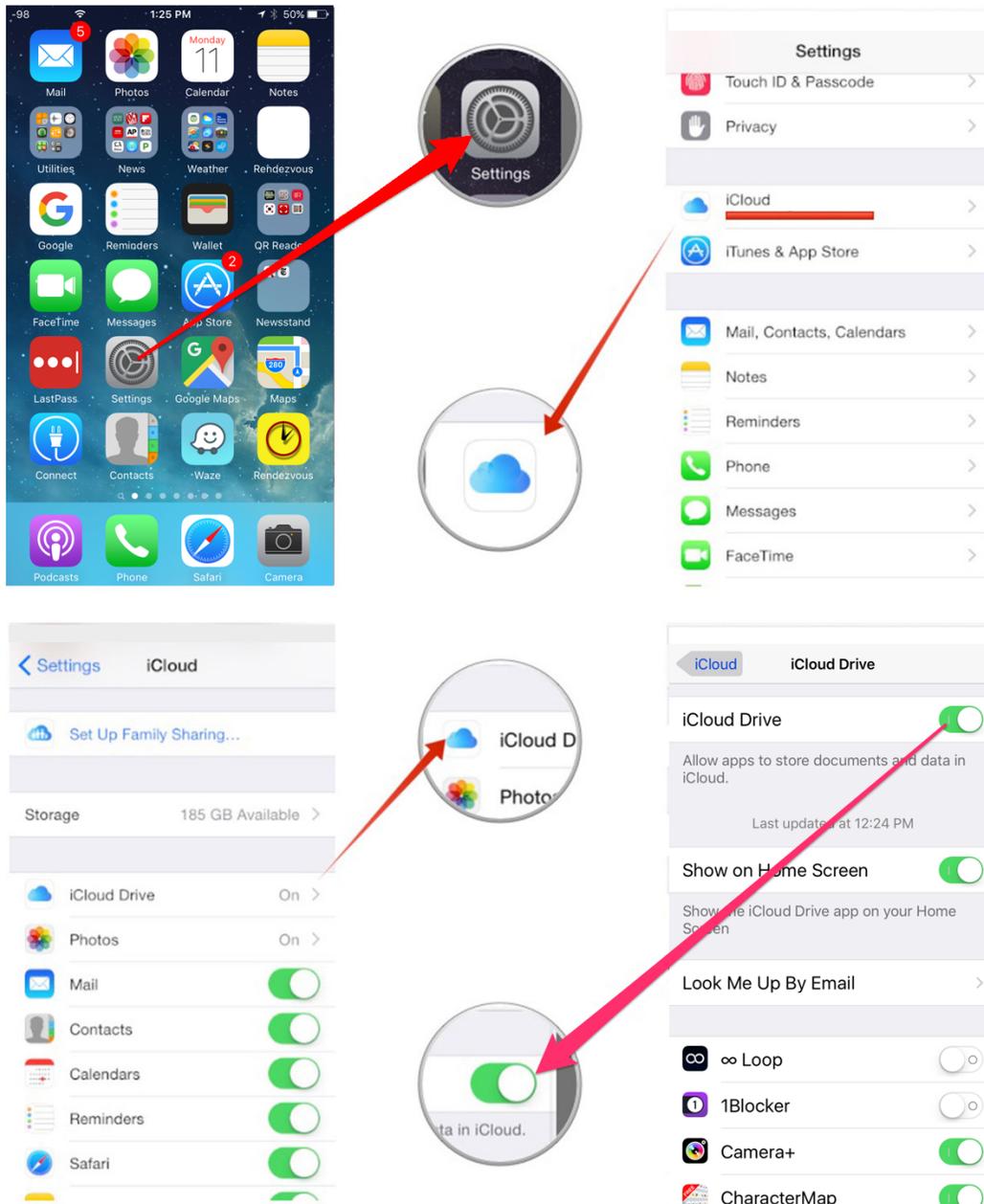
NOTE: IN ORDER TO SYNC BETWEEN DEVICES EACH DEVICE MUST BE LOGGED INTO THE SAME iCLOUD ACCOUNT AND HAVE iCLOUD DRIVE ENABLED ON BOTH YOUR iPHONE AND YOUR iPAD.

As soon as both devices are connected to the Internet (either WiFi or cellular/mobile) app data will be maintained in your iCloud account. Please note that all appointment and client records are also stored on your iPhone and iPad as well. This allows adding and editing any appointment or client record without an Internet connection. Then, when the iOS device connects to the Internet it will upload all changes and additions to your iCloud account, whereupon your other iOS device(s) will be updated to reflect the changes.

Export your Data

To export your data select one of the three choices and tap Send. You can then email a comma separated value (CSV) file that can be opened in Numbers, Microsoft Excel, a text editor, or a database. Note: In order to access the file you will need to email it to yourself. The attached file can then be opened in one of these apps, and the email Compose screen is automatically created.

Deleting Clients

To delete a Client open the Client List, select the Client to be deleted, swipe left and a red Delete box will slide out; tap on it to delete the Client. An Alert will advise that this specific client and all appointments with be deleted and the deletion cannot be undone.

Canceling and Moving Appointments (iPhone)

To cancel an appointment tap on the appointment then swipe left and tap on the red Cancel Appt. You will be asked to confirm the cancelation.

To move an appointment to a new time and/or date tap on the appointment to open the edit appointment screen. Then tap on the Date to open the current calendar screen, select the date and tap on Use Date. Likewise, to change the time and/or duration of an appointment tap on the appointment's date and time and use the Choose Time screen to change the time and duration. To finish, tap Use Time, then Save. The appointment is now moved to its new day and time.