

Lifetouch Church Directories and Portraits

Photography Scheduling

ADMINISTRATOR USER GUIDE

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PREFACE

The purpose of this User Guide is to provide the designated site administrator information for managing the components of the Lifetouch Church Directories and Portrait's Online Portrait Scheduling website.

You will learn how to:

- Schedule, Edit and Cancel Portrait Sessions
- Use the Waiting List feature for sign-ups
- Disable and enable the website to accommodate paper sign-ups
- Utilize the preset reports and forms

As needed, additional training and support will be provided by your Lifetouch Sales Representative or by the Lifetouch Center of Excellence team.

GETTING STARTED

1. Access the Online Scheduling Site at: https://account-lifetouch.appointment-plus.com/ap/ap_admin_v2/login.php
2. Enter your **User Name** and **Password** as provided in the email sent to you with these instructions > click **Sign In**.

AppointmentPlus™

Username

Password

Remember me

[Forgot password?](#)

Sign In

3. The website will then require you to change your password. Enter your new password > click **Change Password**.

Your password needs to be updated. Please create a new password.

Your Login	Host
Change Password	<input type="text"/>
Retype Password	<input type="text"/>

Change Password

NOTE:

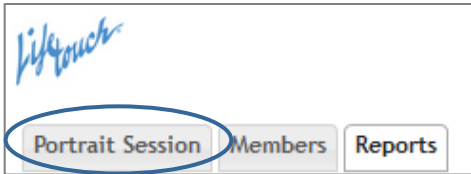
- a. Write down your login and password information and store it in a safe place.
- b. Share this information with others that will be assisting you with sign-ups.
- c. Both your login and password are needed to access your site.

PHOTOGRAPHY SESSIONS

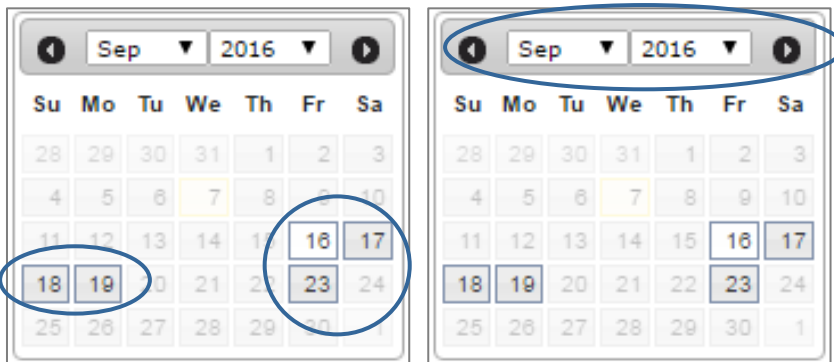
As the site administrator, you will be able to schedule sessions, edit sessions, or cancel sessions on behalf of a family/individual.

Scheduling Portrait Sessions

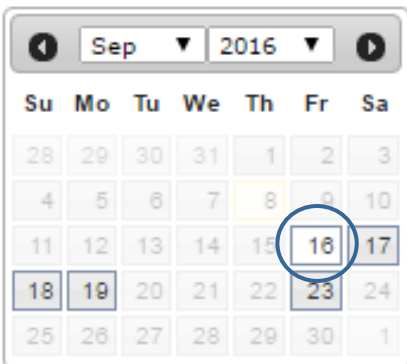
1. Click on **Portrait Session** tab at top of page.



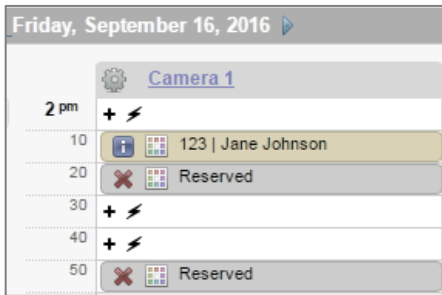
2. Your open photography days will be highlighted in the calendar on the site.
 - Click on individual days to view detailed scheduling information
 - Toggle between months and years to find desired timeframe



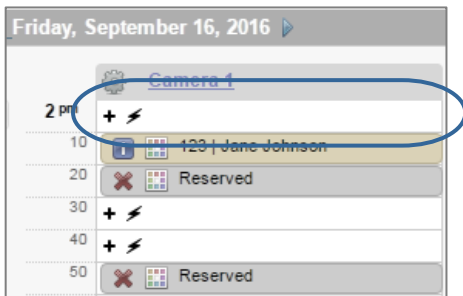
3. Determine the desired available photography day.
 - Keep in mind that two time slots are needed for groups of 7 or more
4. Click on that day on the calendar at left of page.



5. Determine the desired time of day from the available time slots. You will need to work around the time slots that are already scheduled, as well as reserved times.
 - In the example below 2:00, 2:30 and 2:40 are open:



6. Click on the time slot that works for the member.

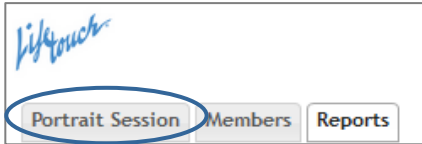


7. Enter **First Name**, **Last Name**, **Phone Number**, **Email Address*** and select **Number in Group**. The duration and status will update automatically based on the information you enter.
8. Click on **Finalize Portrait Session**.

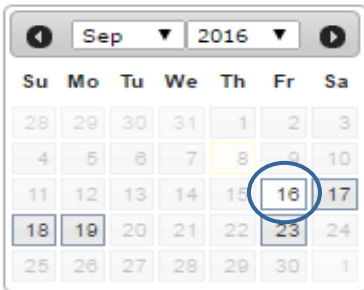
NOTE: When you enter the members email, a **confirmation e-mail** is sent immediately and a **reminder e-mail** is sent a few days prior to their scheduled date.

Change/Edit Portrait Sessions

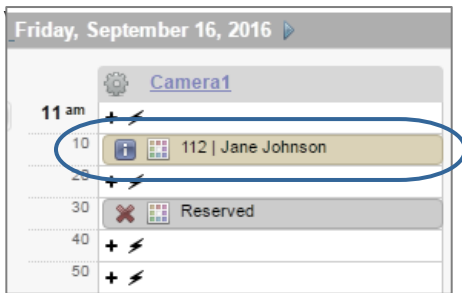
1. Click on **Portrait Session** tab at top of page.



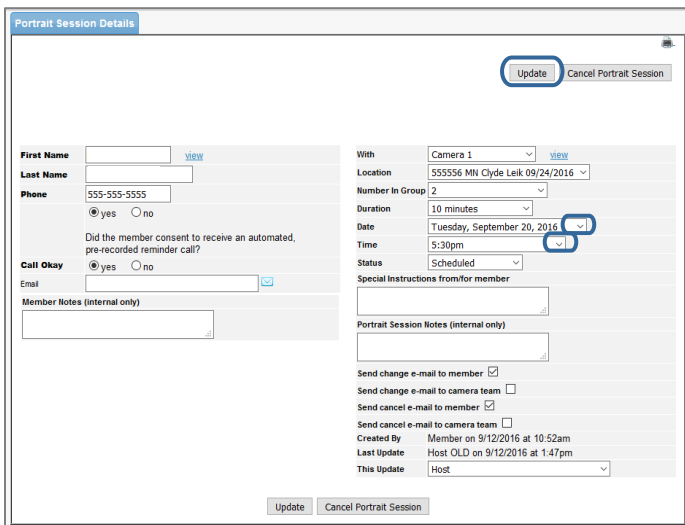
2. Find a day and time to rescheduled portrait session (groups of 7 or more will need two time slots).
3. Click on the day of the current session at the left of page.



4. Click on the name.

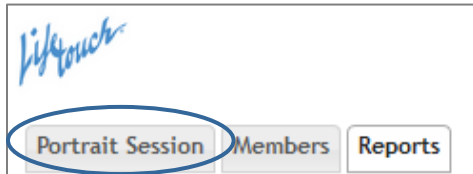


5. Select new **Date** with drop down menu at right of page.
6. Select new **Time** with drop down menu at right of page.
7. Click on **Update**.

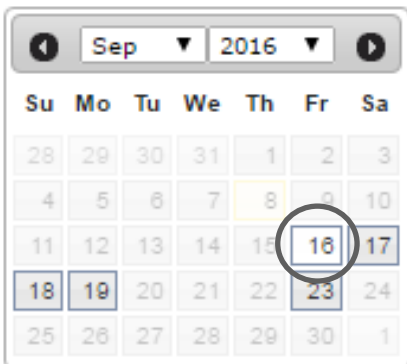
A screenshot of the 'Portrait Session Details' form. The form contains various fields for session information. The 'Date' dropdown menu is set to 'Tuesday, September 20, 2016' and the 'Time' dropdown menu is set to '5:30pm'. Both dropdown menus are circled in blue. At the top right of the form, there are 'Update' and 'Cancel Portrait Session' buttons. At the bottom of the form, there are also 'Update' and 'Cancel Portrait Session' buttons.

Cancel Portrait Sessions

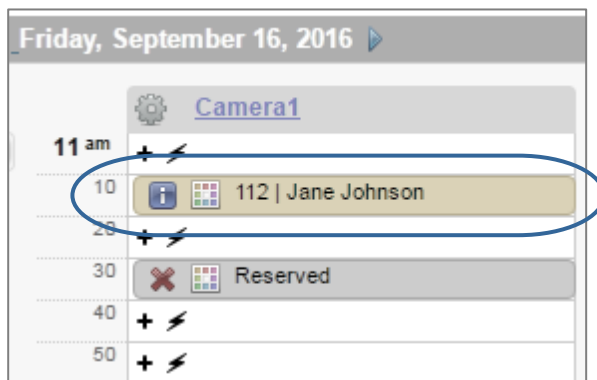
1. Click on **Portrait Session** tab at top of page.



2. Click on the day of the current session at the left of page.



3. Click on the name of the member.



4. Click on **Cancel Portrait Session**.



THE WAITING LIST

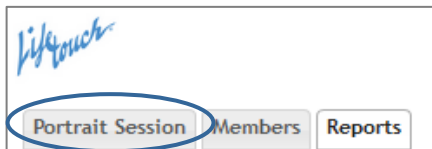
The Waiting List feature allows you to monitor the activity of families that have signed up to be on the waiting list (families will register for the waiting list when they have determined there are no open days/times that work with their schedule, yet they want to participate in your event).

As the administrator, you will also be able to:

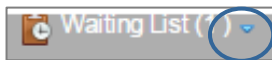
- Add a Session to the Waiting List
- Delete a Session from the Waiting List
- Schedule a Session from the Waiting List

Monitor Waiting List Activity

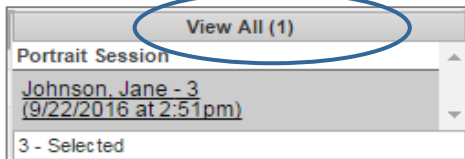
1. Click on **Portrait Session** tab at top of page.



2. Select the **Waiting List**.



3. Click on **View All**



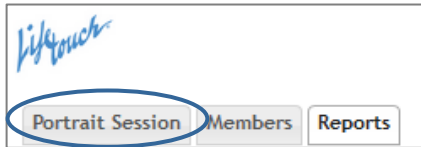
4. A report will display showing all families that have been added to the Waiting List.

Date/Time	Member	Phone	Email	Number In Group	Camera Team	Notes	Status	Actions
9/22/2016 2:51pm	Jane Johnson	555-555-5555		3		Looking for time on Sunday	Waiting	Delete

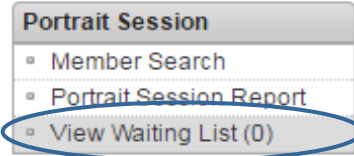
As an administrator you will monitor this activity, assist with finding open times, and consult with your Lifetouch Sales Rep to add additional days if needed.

Add Session to Waiting List

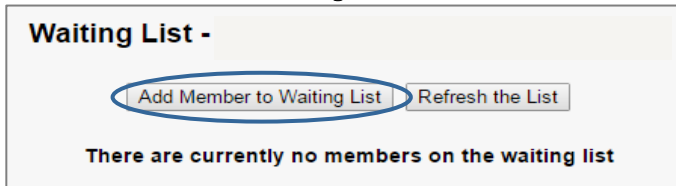
1. Click on **Portrait Session** tab at top of page.



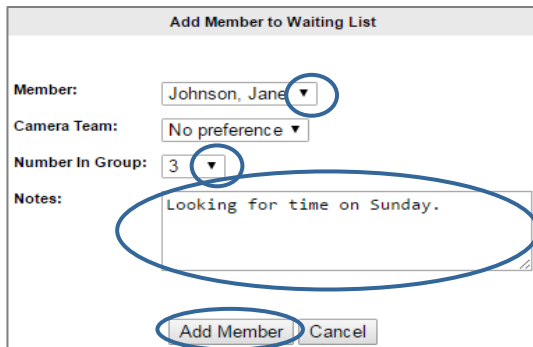
2. Select the **View Waiting List**.



3. Click **Add Member to Waiting List**.



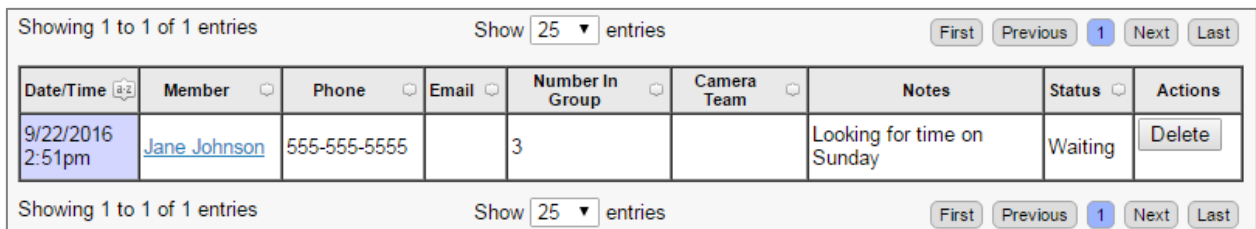
4. Select **Member**, **Number In Group**, and enter any **Notes** if needed > then click **Add Member**.



The screenshot shows the 'Add Member to Waiting List' form. The fields are: 'Member' (Johnson, Jane), 'Camera Team' (No preference), 'Number In Group' (3), and 'Notes' (Looking for time on Sunday.). The 'Add Member' button is highlighted with a blue circle.

NOTE: If family name is not shown in **Member** dropdown, you will first need to add the family as a member. See page 14 to learn how to add a member.

5. Your entry has now been saved to the **Waiting List**.

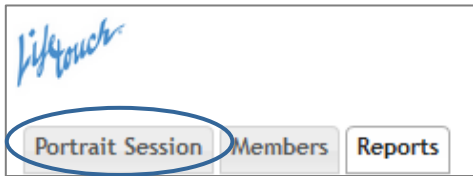


The screenshot shows the 'Waiting List' table with one entry. The table has columns for Date/Time, Member, Phone, Email, Number In Group, Camera Team, Notes, Status, and Actions. The entry is for Jane Johnson on 9/22/2016 at 2:51pm, with 3 members in the group and a note 'Looking for time on Sunday'. The status is 'Waiting' and there is a 'Delete' button in the Actions column.

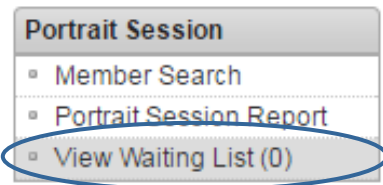
Date/Time	Member	Phone	Email	Number In Group	Camera Team	Notes	Status	Actions
9/22/2016 2:51pm	Jane Johnson	555-555-5555		3		Looking for time on Sunday	Waiting	Delete

Delete a Session from Waiting List

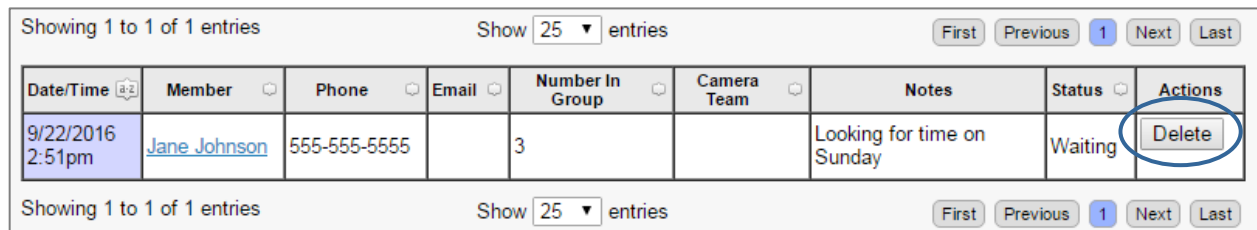
1. Click on **Portrait Session** tab at top of page.



2. Select the **View Waiting List**.



3. Select session you want to delete > click **Delete**.



A screenshot of a table displaying session information. The table has a header row with columns: Date/Time, Member, Phone, Email, Number In Group, Camera Team, Notes, Status, and Actions. Below the header is one data row. The 'Delete' button in the Actions column is circled in blue. Above and below the table are pagination controls showing 'Showing 1 to 1 of 1 entries' and 'Show 25 entries'.

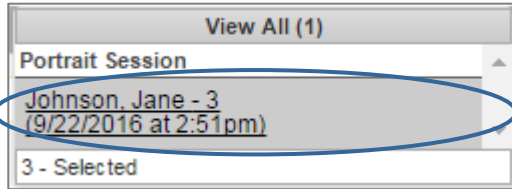
Date/Time	Member	Phone	Email	Number In Group	Camera Team	Notes	Status	Actions
9/22/2016 2:51pm	Jane Johnson	555-555-5555		3		Looking for time on Sunday	Waiting	Delete

Schedule a Session from Waiting List

1. Click on **Waiting List** at the top right corner.



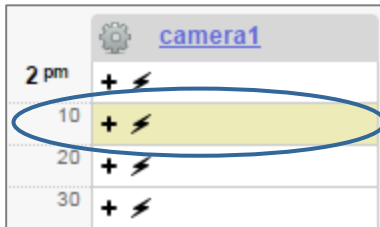
2. Select the member's **Portrait Session** you would like to schedule.



3. A banner will display your selection, and prompt you to select desired time slot.



4. Select open time slot for scheduling > then *follow instructions to schedule event (page 5)*.

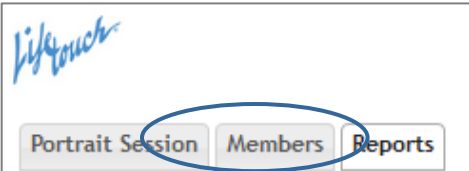


MEMBER SEARCH/ADD

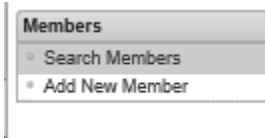
Member Search

The Members Search function allows you to search by Name to locate portrait scheduling information.

1. Click on **Members** tab at top of page.



2. Click **Search Members**.



3. Click on the first letter of their last name at right of page **or** enter text in the Search Text field (in this example, Search By indicates a search by Last Name).

A screenshot of the 'Member Search' form. It includes a 'Location' dropdown menu with '123457 MN Ralph Bato...' selected. Below it is a 'Search By' dropdown menu with 'Last Name' selected. The 'Search Text' input field is highlighted with a blue circle. To the right of the form is a navigation bar with letters A through Z and a 'List all' link, also circled in blue. At the bottom of the form is a 'Sort By' dropdown menu with 'First Name' selected and a 'Search' button.

4. Based on search, a list will appear.

Member Name	E-mail Address	Phone Numbers
First Name Here	email@email.com	555-222-2222

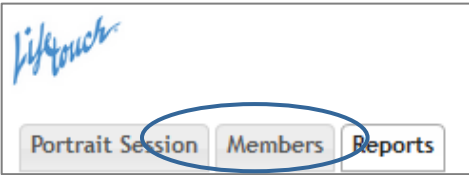
5. Click on Member Name for additional information or click on Email Address to send an email.

Add New Member

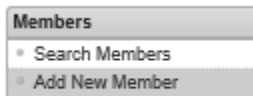
Using the Add New Member feature, you will add basic family information, assign a log-in and password, and then easily access member name through dropdown menus throughout the site.

Note: when adding a member to the Waiting List, you will first need to complete Add New Member information using this section.

1. Click on **Members** tab at top of page.



2. Click **Add New Member**



3. **Member Information** screen will appear. Complete First Name, Last Name, and Phone number are required field. You may also add email address and assign a login and password (not required).

Member Information

First Name	<input type="text"/>
Last Name	<input type="text"/>
Phone	<input type="text"/>
Call Okay	<input checked="" type="radio"/> yes <input type="radio"/> no
Email	<input type="text"/>
Login	<input type="text"/>
Password	<input type="password"/>
Retype Password	<input type="password"/> This is a temporary password and requires a change upon login

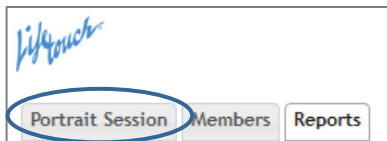
PAPER SIGN-UP PROCESS

At times, you may provide families the opportunity to sign-up off-line (on weekends, during an event, and the like). When you do this, you will want to disable your online sign up site, preventing the possibility of double entries. Once your off-line sign-up sessions are complete, you will enter these sessions, and then enable the site to allow new families to schedule again. This section will show you how to:

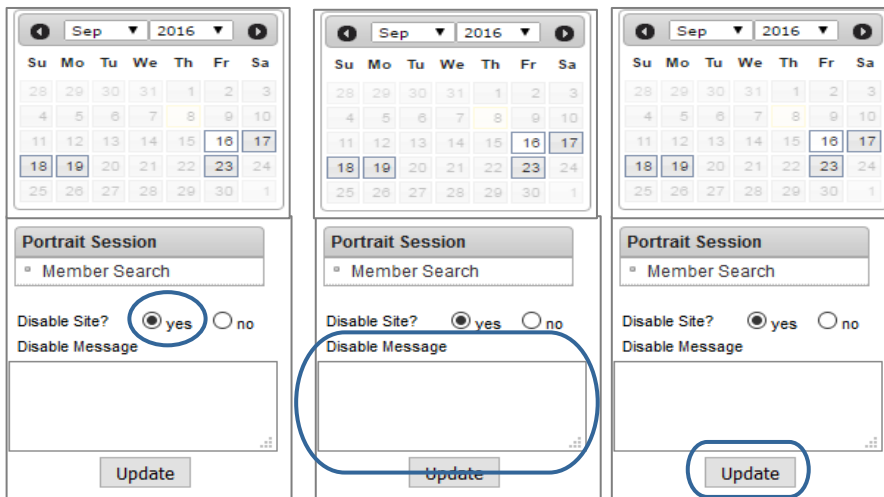
- Disable Website
- Enable Website
- Print Portrait Session Sheet

Disable the Website

1. Click on **Portrait Session** tab at top of page.



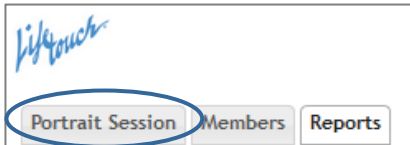
2. Click on **Yes** for disable site on the left of the page below the calendars
3. Enter your own **Disable Message**, if you would like to override the default message.
4. Click on the **Update** button.



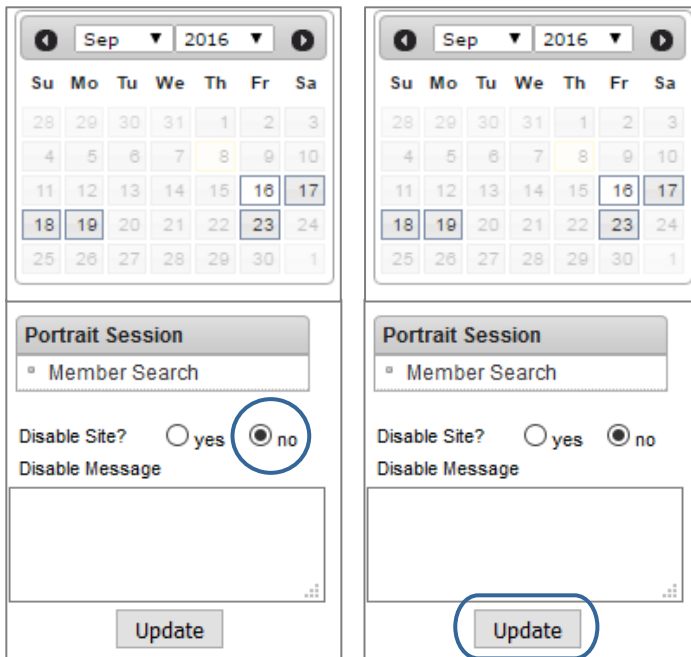
Enable the Website

You must enter all the portrait sessions from the paper sign-up sheets before you enable the web site. *Follow the instructions to enter time slots (page 4) before completing.*

1. Click on **Portrait Session** tab at top of page.



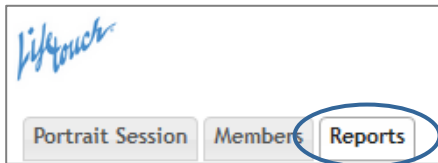
2. Click on **no** to **Enable Site**.
3. Click on the **Update** button.



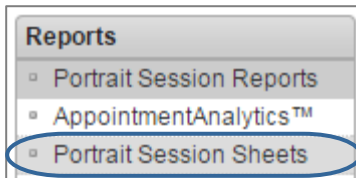
Print Paper Schedules for Weekend Sign-up

This is where you will print out the forms for paper sign-ups. **You must disable the web site prior to printing these.** Follow the instructions to disable the website (page 10) before completing.

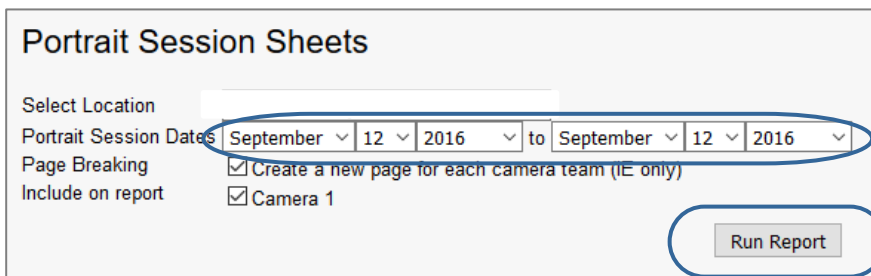
1. Click on **Reports** tab at top of page.



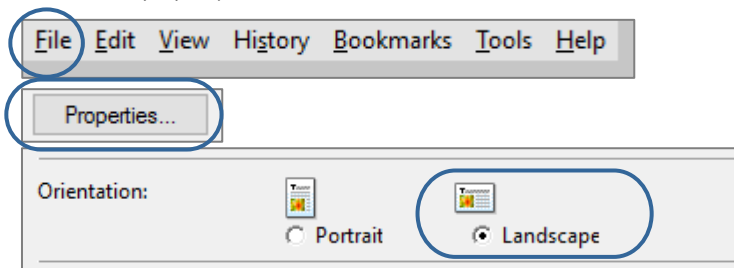
2. Click on **Portrait Session Sheets**.



3. Select **Date Range** of photography.
4. Click on **Run Report**.



5. Window will open with report > print the report.
 - Click on **File > Print**, change properties to print Landscape (note; each day will print on two sheets of paper).



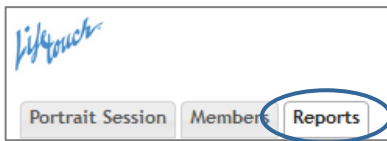
REPORTING & DOCUMENTATION

This segment highlights a couple of the most-used reports; Photo Day Check-In Report and Alpha List by Name to Excel.

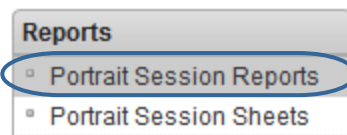
Photo Day Check-In Report

NOTE: Print Photo Day Check-In Report the morning of the photography, or in the evening the day prior – in order to ensure no additional scheduling has taken place before pulling the report.

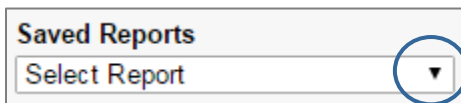
1. Click on **Reports** tab at top of page.



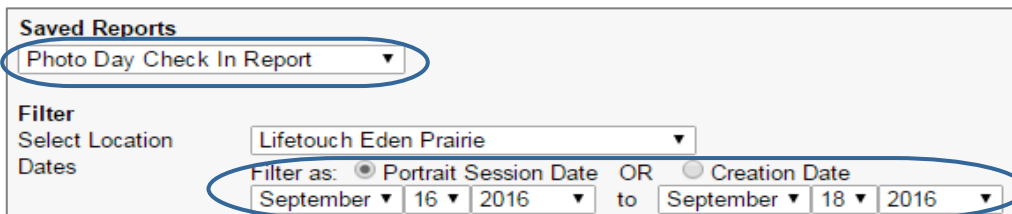
2. Click on **Portrait Session Reports**.



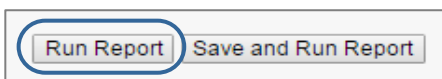
3. Click on drop down for **Saved Reports**.



4. Select **Photo Day Check In** report.
5. Select **Date** of photography for member check-in.



6. Click on **Run Report**.

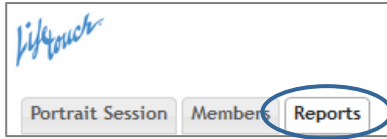


7. A window will open with report; print the report. If the report does not fit on one page, go to **File**, then **Page Setup** and adjust your print settings to reduce size or print to legal paper.

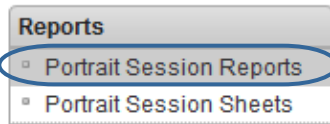
Alpha List by Name to Excel

Use this report to match against your roster to identify members that have not yet made appointments.

1. Click on **Reports** tab at top of page.



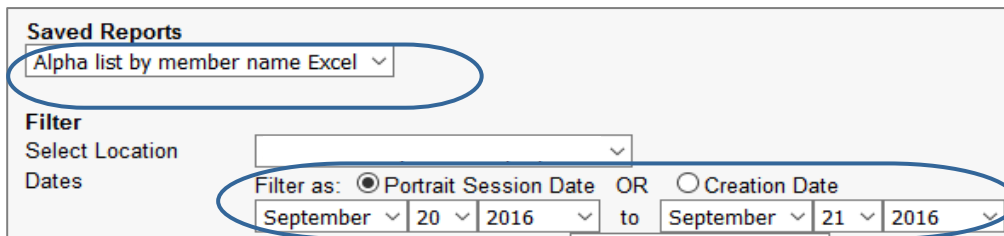
2. Click on **Portrait Session Reports** at left of page.



3. Click on drop down for **Saved Reports**.



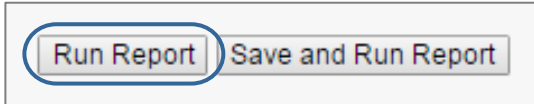
4. Select **Alpha List by Member Name** to excel.
5. Select **Date Range**.



6. Select any additional information you may want in the report by checking the boxes under **Include in Report**.

Include in Report		
<input type="checkbox"/> Location	<input checked="" type="checkbox"/> Portrait Session Date	<input type="checkbox"/> Created By
<input checked="" type="checkbox"/> Member Name	<input type="checkbox"/> Duration	<input type="checkbox"/> Creation Date
<input type="checkbox"/> Middle Name	<input checked="" type="checkbox"/> Start Time	<input type="checkbox"/> Creation Time
<input type="checkbox"/> Occupation	<input checked="" type="checkbox"/> Number In Group	<input type="checkbox"/> Last Update Date
<input type="checkbox"/> Company	<input type="checkbox"/> Camera Team	<input type="checkbox"/> Last Update Time
<input type="checkbox"/> Payment Method (Member)	<input type="checkbox"/> Camera Team (screen name)	<input type="checkbox"/> Last Updated By
<input type="checkbox"/> Special Needs	<input type="checkbox"/> Camera Team Type	<input type="checkbox"/> Lead Source
<input type="checkbox"/> Account Number	<input type="checkbox"/> Assigned To	<input type="checkbox"/> Customer Type
<input type="checkbox"/> Gender	<input type="checkbox"/> Referred By	<input type="checkbox"/> Portrait Session Notes (internal)
<input type="checkbox"/> Address	<input checked="" type="checkbox"/> Portrait Session Status	<input type="checkbox"/> Portrait Session Notes (from customer)
<input type="checkbox"/> City	<input type="checkbox"/> Cancel Reason	<input type="checkbox"/> Customer Notes
<input type="checkbox"/> State		<input type="checkbox"/> Alert
<input type="checkbox"/> Zip Code		
<input checked="" type="checkbox"/> Phone Number		
<input checked="" type="checkbox"/> Email		
<input type="checkbox"/> Birth Date		

7. Click on **Run Report**.



8. Window will open with Excel spreadsheet.
9. Go to **File** and save spreadsheet for using to match against roster.

NOTE: If printing, window will open with report; print the report. If the report does not fit on one page, go to **File**, then **Page Setup** and adjust your print settings to reduce size or print to legal paper.