



Artbook Planner



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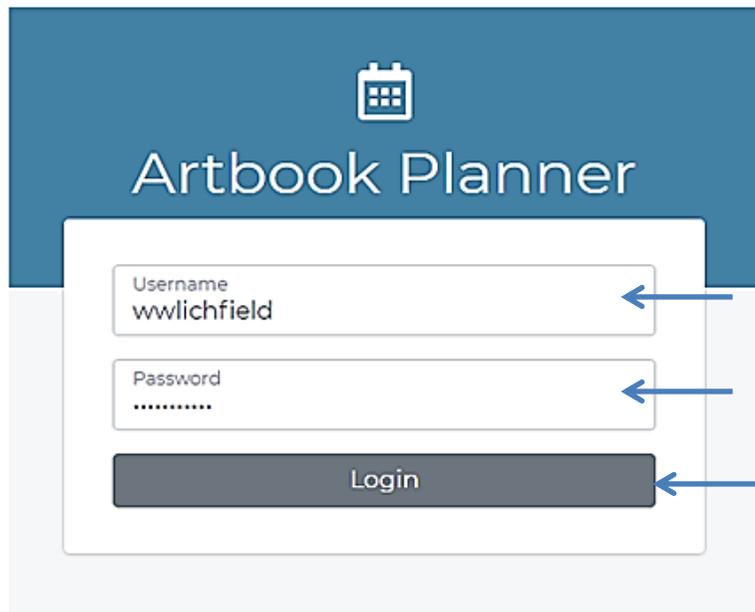
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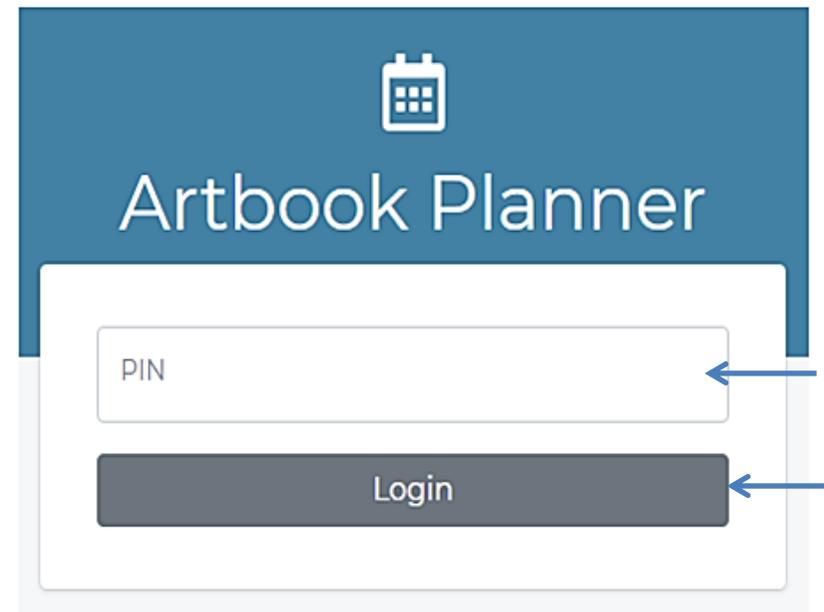
Logging In

Enter the following URL: planner.theartbook.org

Enter **Username** and **Password** → Select **Login** → Enter **PIN** → Select **Login**



The screenshot shows the 'Artbook Planner' login interface. At the top, there is a calendar icon and the text 'Artbook Planner'. Below this, there are two input fields: 'Username' with the text 'wwlichfield' and 'Password' with a masked password '.....'. A dark grey 'Login' button is positioned below the password field. Three blue arrows point to the Username field, the Password field, and the Login button, respectively.

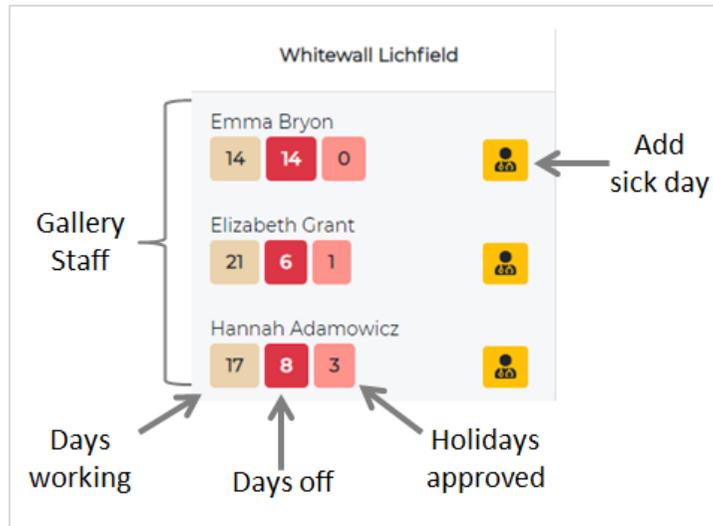


The screenshot shows the 'Artbook Planner' login interface at a later stage. The 'Artbook Planner' header and calendar icon remain at the top. The input fields now consist of a single 'PIN' field and a dark grey 'Login' button below it. Two blue arrows point to the PIN field and the Login button, respectively.

Calendar

The image shows a calendar interface for February 2019. At the top, there are tabs for 'Calendar' and 'Leave', with a 'Request holiday/lieu day' annotation pointing to the 'Leave' tab. Below this, the current date is 'Sunday February 24th' with a 'Copy Day' button. Navigation controls include arrows for 'Select month, week or day' and 'today', and a dropdown for 'February 2019' with 'month', 'week', and 'day' view options. The calendar grid shows events for each day, such as 'ASM visit' on Wednesday, 'Home appointment' on Tuesday, and 'Sales lead action' on Wednesday. Annotations include 'Note added' pointing to a note icon, 'Sick day' pointing to a yellow event, 'Staff working and shifts' pointing to a row of events, 'Sales lead action' pointing to a blue event, 'Delivery day' pointing to a purple event, 'Holiday request pending' pointing to a red event, 'Approved holidays' pointing to a red event, and 'Date selected' pointing to a date cell. On the right, 'Change view - month, week, or day' points to the view controls, and 'Gallery Events' points to a specific event.

Filters



All filters can be selected to view specific information (click once to remove, click again to add). For example:

If a user wishes to display one staff member's rota, click on the other staff members to remove their information.

If a user wishes to remove any of the filters below, click on the name of the filter.

	Working	←	Staff members working – Added manually in Gallery
	Event	←	Gallery events – Automatically generated
	Holiday	←	Approved holidays
	Pending Holiday Request	←	Requested holidays, awaiting approval
	Delivery	←	Weekly van delivery (deliveries and returns) – Automatically generated
	Home Appointment	←	Booked home approvals – Added manually in gallery
	Sales Lead Action	←	Sales Lead next action – Pulls through from the CRM (Leads)
	Sick	←	Sick days

Notes

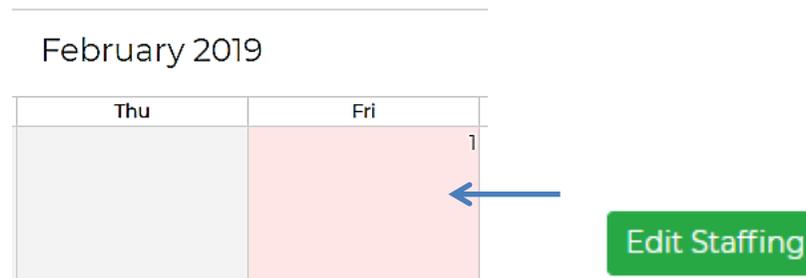
The screenshot displays a software interface with the following sections and annotations:

- Notes:** Header bar with a green plus icon. An arrow points from the text "Add note" to the plus icon.
- Notes Content:** A yellow highlighted box containing the text "Gallery closed for trade show". An arrow points from the text "Notes added" to this box.
- Home Appointments:** Header bar with a green plus icon. An arrow points from the text "Add home appointment" to the plus icon.
- Home Appointments Content:** The text "No Appointments". An arrow points from the text "Home appointment details" to this text.
- Events:** Header bar.
- Events Content:** The text "No Events". An arrow points from the text "Gallery event details" to this text.
- Sales Lead Actions:** Header bar.
- Sales Lead Actions Content:** A list of details: "Elizabeth Grant to Telephone and Email", "Jim Medley", "Email images and call when artwork is in gallery.", "Status: Hot", "Value: £1,000", "Artist: Tom Butler", and "Medium: Limited Print". An arrow points from the text "Sales lead action details" to this content.

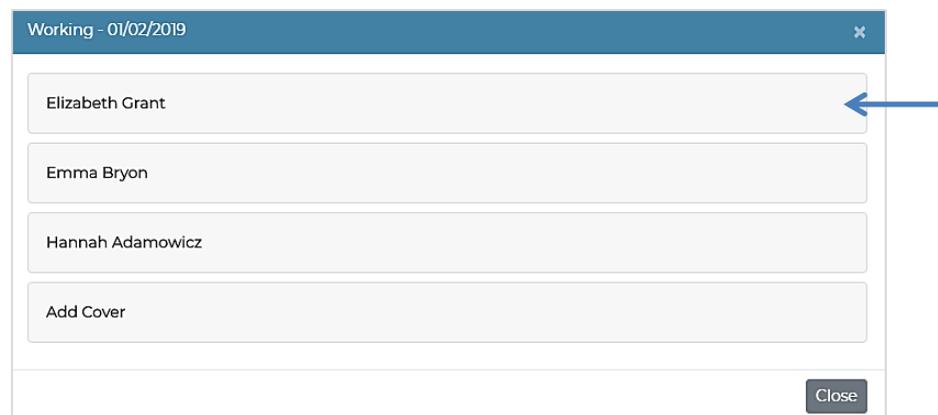
Edit Staffing

Staffing details are added manually by the **Gallery Manager**. The planner can only be updated in advance; the current date and past dates cannot be edited:

Click on the date that requires updating – The selected box will highlight. From the top of the screen, select the **Edit Staffing** tab



All gallery staff members will be displayed; this includes a tab for gallery cover staff. Select the required staff member



Select the required shift **Start Time** and **End Time** – Use the arrow up and down keys or enter the time in manually → Select **Save**

Working - 01/02/2019

Elizabeth Grant

Start Time: 09:00 End Time: 18:00

Save

Close

The selected shift will now be displayed alongside the selected member of staff → Select **Close**

Working - 01/02/2019

Elizabeth Grant Working 09:00 until 18:00

Emma Bryon

Hannah Adamowicz

Add Cover

Close

If adding a cover member of staff, select the **Add Cover** tab

Using the **Consultant** drop down box, select the **Consultant** that is covering in the gallery → Select the required shift **Start Time** and **End Time**
– Either use the arrow up and down keys or enter the time in manually → Select **Save** → Select **Close** to return to the calendar

Working - 01/02/2019

Add Cover

Consultant: -- Select a Consultant --

Start Time: --:-- End Time: --:--

Save

Close

Once the shifts have been added, the details will be displayed on the calendar on the selected date, as well as on the cover consultants home gallery calendar

Thu	Fri
	1
	9:00 - 18:00 Elizabeth C

Default times can be set. Select **Edit Staffing** → Select **Set Default Times**

Working - 21/03/2019 ✕

Set Default Times

Elizabeth Grant

Emma Bryon

Hannah Adamowicz

Add Cover

Close

Enter the default **Start Time** and **End Time** → Select **Save**

Working - 21/03/2019 ✕

Set Default Times

Start Time: End Time:

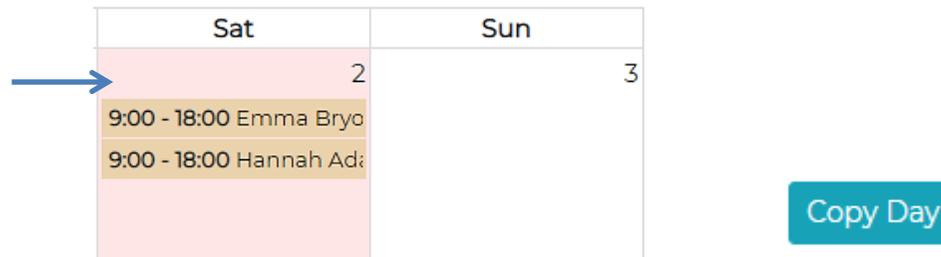
Save

Close

Copy Day

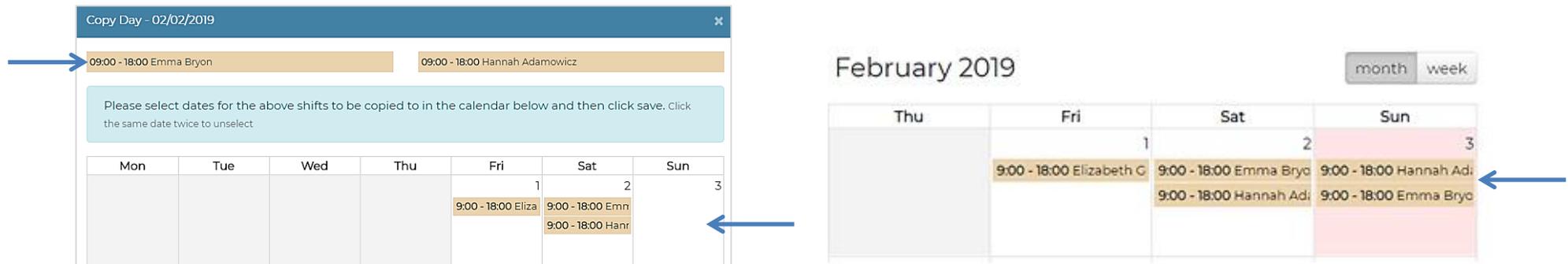
If the same members of staff are in on multiple days, the data can be copied and added to multiple dates on the calendar:

Click on the date required to copy - The selected box will highlight. From the top of the screen, select the **Copy Day** tab



Click on the date/s for the shifts displayed at the top of the screen to be copied to – To unselect, select the same date twice → Select **Save**

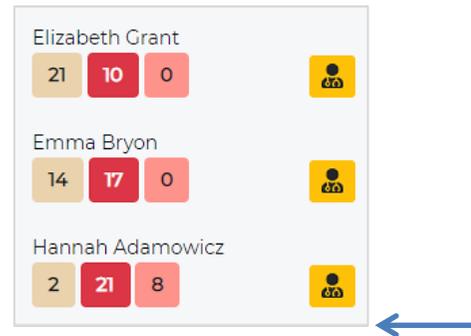
The details of the shifts will now be displayed on the calendar



Sick Days

Sick days are added manually by the gallery.

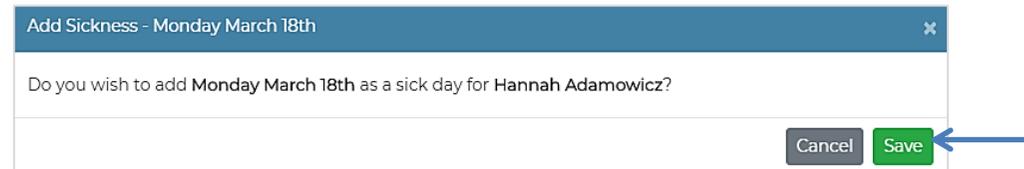
Select the correct day → Select the **Add Sickness** icon next to the correct staff member



A screenshot of a staff member list. It shows three members: Elizabeth Grant, Emma Bryon, and Hannah Adamowicz. Each member has three colored boxes (yellow, red, pink) and a yellow 'Add Sickness' icon. A blue arrow points to the 'Add Sickness' icon for Hannah Adamowicz.

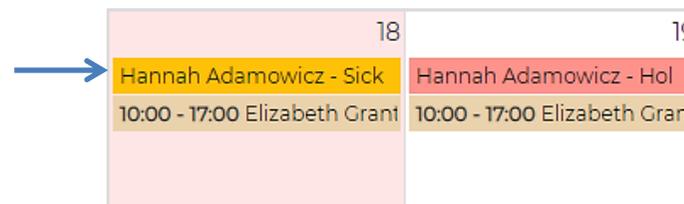
Staff Member	Yellow Box	Red Box	Pink Box	Add Sickness Icon
Elizabeth Grant	21	10	0	Yes
Emma Bryon	14	17	0	Yes
Hannah Adamowicz	2	21	8	Yes

Confirm the details are correct → Select **Save**



A confirmation dialog box titled "Add Sickness - Monday March 18th". It asks "Do you wish to add Monday March 18th as a sick day for Hannah Adamowicz?". There are "Cancel" and "Save" buttons. A blue arrow points to the "Save" button.

The details will be displayed on the selected day



A screenshot of a calendar grid showing two days: 18 and 19. On day 18, there is a yellow box labeled "Hannah Adamowicz - Sick" and a pink box labeled "10:00 - 17:00 Elizabeth Grant". On day 19, there is a red box labeled "Hannah Adamowicz - Hol" and a pink box labeled "10:00 - 17:00 Elizabeth Grant". A blue arrow points to the yellow box on day 18.

Day	Event
18	Hannah Adamowicz - Sick
18	10:00 - 17:00 Elizabeth Grant
19	Hannah Adamowicz - Hol
19	10:00 - 17:00 Elizabeth Grant

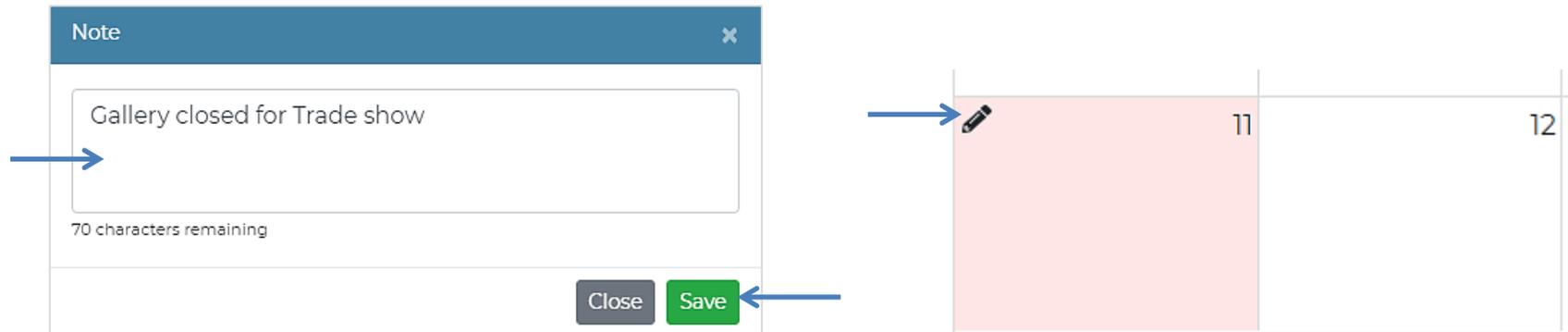
Add a Note

Notes are added manually by the gallery.

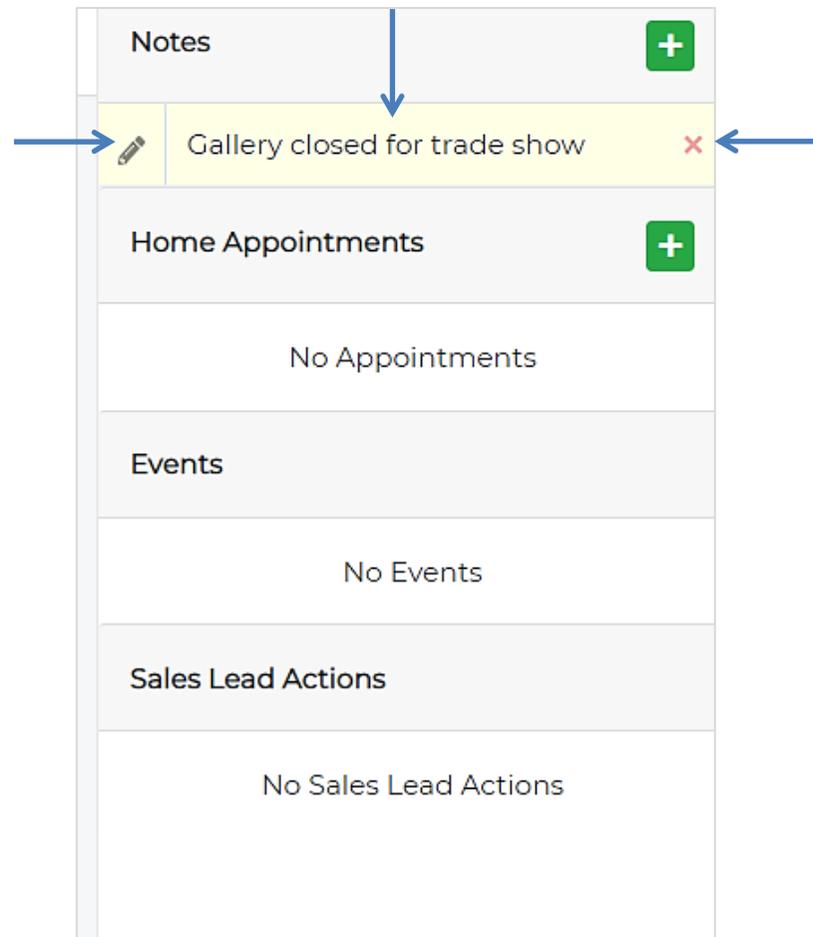
Click on the date that requires a note - The selected box will highlight. From the right hand side of the screen, select the **Add** icon next to **Notes**



In the text box, enter the note details (Maximum of 100 characters) → Select **Save**. A **Pencil** icon will be displayed on the dates where a note has been added



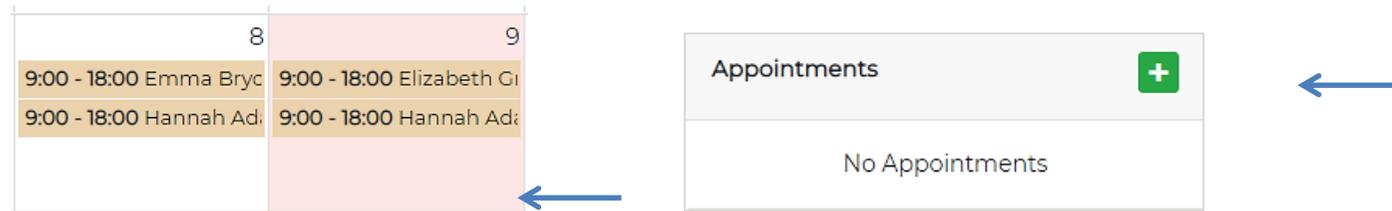
When a date with a note is selected, the note will be displayed in the notes section on the right hand side of the screen. To edit the note, select the **Edit** icon, to delete the note, select the **Red Cross**



Home/Gallery Appointment

A home/gallery appointment is added manually by the gallery.

Click on the arranged appointment date - The selected box will highlight. From the right hand side of the screen, select the **Add** icon next to **Appointments**



From the **Type** field, select **Home** or **Gallery**. From the **Client** field, select the **Search** icon

The image shows an 'Appointment' form with the following fields and values:

- Type: Home (dropdown menu)
- Client: (empty search bar with a magnifying glass icon)
- Date: 09/09/2019 (calendar icon)
- Start Time: --:-- (time picker)
- End Time: --:-- (time picker)
- Consultant: -- Select a Consultant -- (dropdown menu)
- Notes: (empty text area)
- Address: -- Select an Address -- (dropdown menu)

At the bottom right of the form are two buttons: 'Back' and 'Save'.

Two blue arrows point to the 'Type' dropdown and the 'Client' search icon.

Enter the clients **Surname**, **Postcode** and **Email Address** (All fields must be completed) → Select **Find**

Search Client

Surname
Medley

Post Code
B23 5YP

E-Mail
test@test.com

Find

Close

Select the correct client by clicking on the client line

Search Client

Name	Post Code	E-Mail
Justin Medley	B23 5YP	test@test.com

Back

Enter and select the appointment details – Complete all fields

Home Appointment

Client: Justin Medley

Date: 09/02/2019

Start Time: 10:00 End Time: 12:00

Consultant: Hannah Adamowicz

Notes: Home approval - Akiyama and Simon Kenny.

Address: 2 Warrington Drive, , Birmingham, B23 5YP

Once all fields are complete, select **Save**. The appointment will be saved and displayed on the calendar. When a date with a home/gallery appointment is selected, the details will be displayed on the right hand side of the screen

8	9
9:00 - 18:00 Emma Bryc	9:00 - 18:00 Elizabeth Gl
9:00 - 18:00 Hannah Ad.	9:00 - 18:00 Hannah Ad.
	10:00 - 12:00 Hannah Ad

Notes

No Notes

Appointments

Hannah Adamowicz visiting Justin Medley
10:00 - 12:00
Home approval - Akiyama and Simon Kenny.

Sales Lead Action

All sales leads are added manually onto the CRM – A next action date must be added for the action to be displayed on the calendar:

Once a sales lead has been added to the CRM, select **Save**. Select a **Next Action** and a **Next Action Date**. Enter the details in the **Details** text box → Select the **Add** tab

The screenshot shows a 'Sales Lead' form with the following fields and values:

- Gallery: Whitewall Lichfield
- Artist: Simon Kenny
- Lead Source: Walk In
- Max. Spend: 4,000.00
- Head Office:
- Date Assigned: 24/09/2019
- Next Action: (empty)
- Details: Looking to purchase a Simon Kenny Original for wife's birthday in March. Would like to view ASAP. (500 chars.)

The 'Actions' section is expanded, showing:

- Action: TelephoneAndEmail
- Date: 25/09/2019
- Details: Email image and call when artwork is in gallery

At the bottom right of the form is a green 'Add' button.

The sales lead action will be saved and displayed on the calendar. When a date with a sales lead action is selected, the details will be displayed on the right hand side of the screen

The screenshot shows a calendar interface with two columns for dates 24 and 25. On the 24th, there is one appointment from 10:00 to 18:00 with Elizabeth Gran. On the 25th, there is one sales lead action from 10:00 to 18:00 with Hannah Hudsc. A blue arrow points from the sales lead action on the 25th to a details panel on the right. The details panel is titled 'Sales Lead Actions' and contains the following information:

- Head Office Managed to Telephone and Email Leanne Test
- Email image and call when artwork is in gallery
- Status: Hot
- Value: £4,000
- Artist: Simon Kenny
- Medium: Original

Blue arrows also point to the 'Sales Lead Actions' header and the first line of the details panel.

Holiday Request

To request a holiday or lieu day:

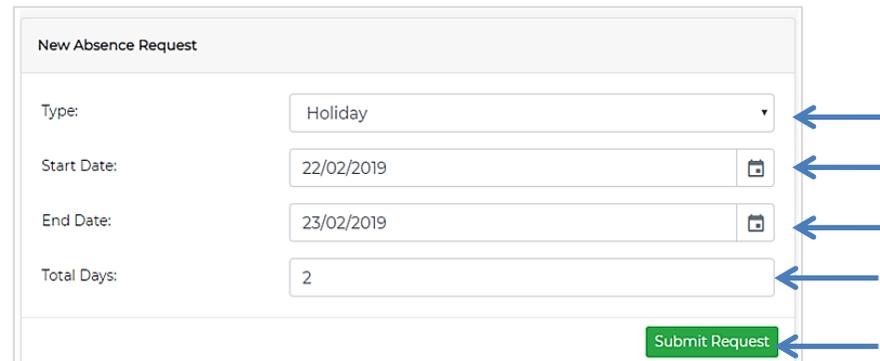
Select **Leave** at the top of the screen



Holiday allowance, booked holidays, pending holiday requests and remaining holidays will be displayed



From the **Type** field select **Holiday** or **Lieu** → Select the holiday **Start Date** (Type this in manually or use the calendar icon) → Select an **End Date** or enter the number of days in the **Totals Days** field (This will automatically generate the end date) → Select **Submit Request**

A form titled 'New Absence Request' with the following fields: 'Type' (dropdown menu with 'Holiday' selected), 'Start Date' (text input with '22/02/2019' and a calendar icon), 'End Date' (text input with '23/02/2019' and a calendar icon), and 'Total Days' (text input with '2'). A green 'Submit Request' button is at the bottom right. Blue arrows point to each of these elements.

Any **Pending Approval Requests** will be displayed at the bottom of the screen (There is an option to cancel if required). Any approved absences are displayed on the right hand side of the screen

My Pending Approval Requests				
From Date	To Date	Total Days	Type	
22/02/2019	23/02/2019	2.0	Holiday	Cancel

My Approved Absences				
From Date	To Date	Total Days	Type	
31/03/2019	01/04/2019	2.0	Holiday	
12/03/2019	12/03/2019	1.0	Holiday	
22/02/2019	23/02/2019	2.0	Holiday	

Select the **Calendar** tab to return to the calendar

Artbook Planner | **Calendar** | My Absences

The **Pending Holiday Request** will be displayed on the calendar. When the holiday request is approved by the relevant approver, the colour on the calendar will change to a solid colour

22		23	
Hannah Adamowicz		Hannah Adamowicz - Hol	
9:00 - 18:00 Elizabeth Grant			
9:00 - 18:00 Hannah Adamo			

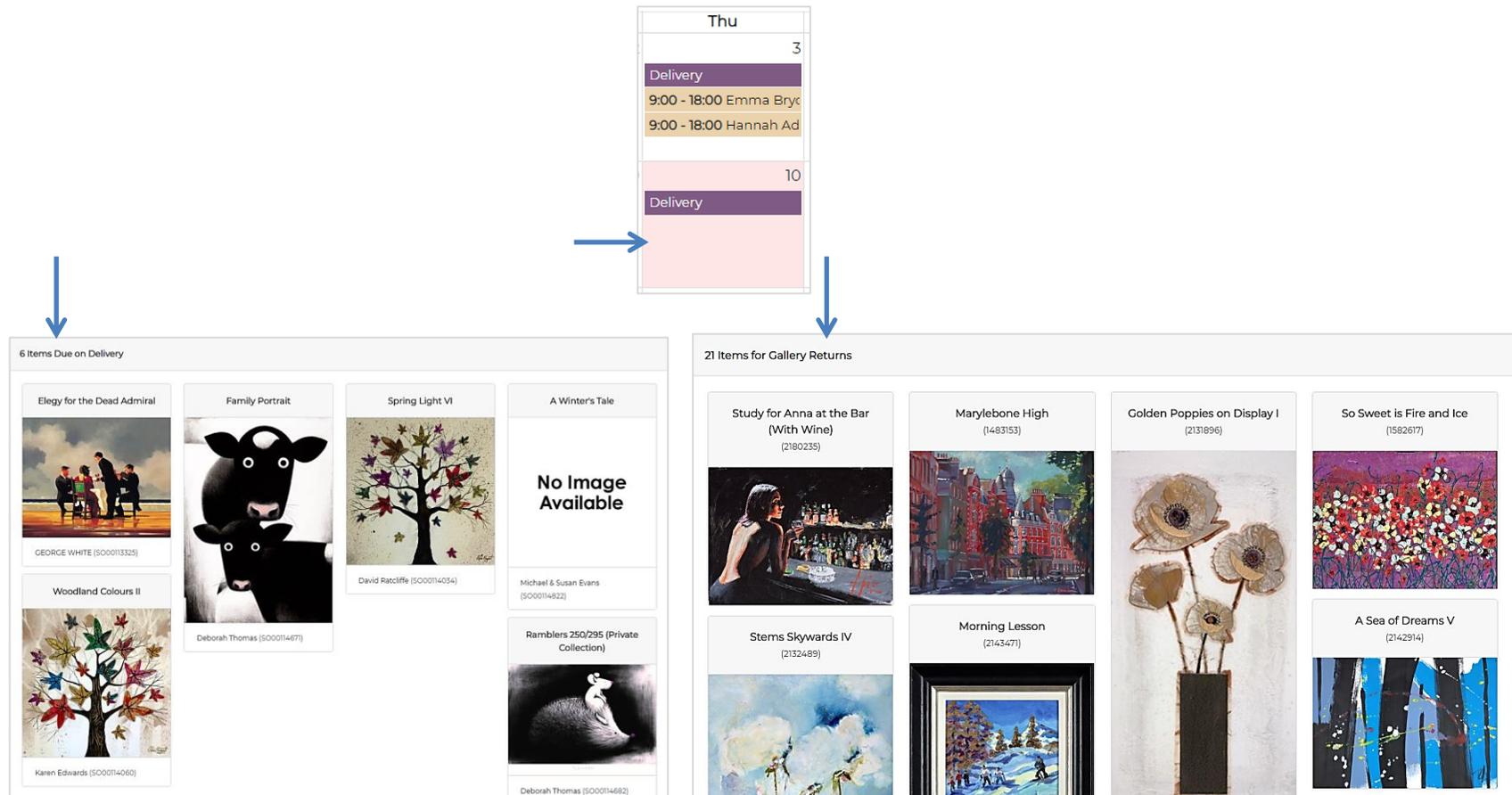
The filters on the left hand side of the screen will also update once holidays are approved

Hannah Adamowicz

19 | 7 | 2

Deliveries

Delivery days are automatically generated. When a date with a delivery is selected, all items **Due on Delivery** and **Gallery Returns** will be displayed at the bottom of the screen – Artwork title and image:



Events

Events dates are automatically generated. When a date with an event is selected, details with regards to the event will be displayed on the right hand side of the screen:



Events



Come and Meet Fabian Perez
19:00 - 20:00
Fabian Perez Nov 18 Tour
[Click to View Brochure](#)

The event details panel features a header 'Events', a photograph of Fabian Perez and a woman, and text providing the event name, time, and a link to view a brochure. A blue arrow points from the right towards the photograph.