

This guide is an overview of how our system works. It gives you general instructions on how to set up your account. For more specific functions, the contextual help will give you detailed instructions and advice. Simply locate the help link:

[ [More help on this topic](#) ]

## Step 1: check & update your details ----- 2

- ✓ Check and update your personal information
- ✓ Manage your privacy settings
- ✓ Check and update your business information

## Step 2: set your appointment types ----- 4

- ✓ Create new appointment types
- ✓ Set your options

## Step 3: create your schedule(s) ----- 6

- ✓ Create your schedule(s)
- ✓ Set your own rules
- ✓ Set your workweek

## Step 4: plan your time off ----- 9

- ✓ Set some time off
- ✓ Customize your time off records

## Step 5: manage the users ----- 10

- ✓ Add new users
- ✓ Determine the users access level

## Step 1: check & update your details

### ■ Your personal information

→ Go to: “MY ACCOUNT” > “MY USER”:

<u>Personal details</u>	<u>Personal preferences</u>
* Full name: <input type="text" value="John Doe"/>	<input checked="" type="checkbox"/> Make my email address public
* Email: <input type="text" value="jdoe@business-name.com"/>	<a href="#">Click here</a> to configure your <b>email notifications</b>
Pwd: [ <a href="#">change your password</a> ]	

Do not forget to save your modifications!


You can configure your email notifications

### ■ Your business information

→ Go to: “MY ACCOUNT” > “COMPANY DETAILS”:

Your contact details will be shown to prospective customers looking for professionals in our database. You may opt to keep some of the fields private.

<u>Company information</u>	<u>General settings</u>
* Business name: <input type="text" value="Your business"/>	<input type="checkbox"/> Make the phone number public
* Activities: <input type="text" value="Healthcare"/>	<input checked="" type="checkbox"/> Make the mobile phone number public
Description: <input type="text" value="Enter a description that describes your business"/>	<input checked="" type="checkbox"/> Make the fax number public
	<input type="checkbox"/> Make the address public

Website URL:	<input type="text" value="http://www.your-site.com"/>
Phone:	<input type="text" value="555-555-5555"/>
Mobile Phone:	<input type="text"/>
Fax:	<input type="text"/>
Address:	<input type="text" value="Your business address"/>
City:	<input type="text" value="Los Angeles"/>
Province / State:	<input type="text" value="California"/>
ZIP code:	<input type="text" value="90033"/>
* Country:	<input type="text" value="United States"/> 

Use the field below to specify the email address which will be used as the sender of all email notifications sent out to your clients and staff. If left blank, our default email address will be used and your clients will be instructed not to reply to those emails.

Email:	<input type="text" value="name@address.com"/>
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[Save Modifications](#)

Note: your contact details are used by our company to manage your appointments and communicate with you. We never sell or otherwise market your contact details.

## Step 2: set your appointment types

### ■ Create your appointment types

→ Go to: “MY SETTINGS” > “APPOINTMENT TYPES”:

You can add as many appointment types as needed. Appointment types may represent anything, including services, reservations, meetings... you name it. Click the following button to add a new appointment type:

Add a New Appointment Type or Service

You can define as many services as necessary with different rules. Here's a few examples of appointment types:

Business	Appointment types
Massage Therapist	<ul style="list-style-type: none"> <li>• Thai massage (1h00)</li> <li>• Swedish massage (1h00)</li> <li>• Relaxation session (30m)</li> </ul>
Tennis Club	<ul style="list-style-type: none"> <li>• Tennis lesson (2h00)</li> <li>• Tennis court (1h00)</li> </ul>
General Practitioner	<ul style="list-style-type: none"> <li>• Regular consultation (20m)</li> <li>• Home visit (50m)</li> </ul>
Dental Group	<ul style="list-style-type: none"> <li>• Tooth whitening (50m)</li> <li>• Dental examination (40m)</li> <li>• Dental implant (1h45)</li> </ul>
Beauty Salon	<ul style="list-style-type: none"> <li>• Body treatment (1h00)</li> <li>• Manicure and pedicure (1h15)</li> <li>• Facial treatment (1h00)</li> <li>• Leg waxing (55m)</li> </ul>
Realtor	<ul style="list-style-type: none"> <li>• First time appt for buyers (20m)</li> <li>• First time appt for sellers (40m)</li> </ul>

## ■ Set your options

→ Go to: "APPOINTMENT TYPES" > click [ Review & Make changes ] :

There's a bunch of options you can choose from. Set and review your titles, descriptions, appointment durations, policies, notifications, reminders, and much more.

You can also change the way appointment types are being displayed during the first step of the appointment taking process. "Reduced" mode will hide the description and policy, and leave the appointment title and duration:

Your clients:  Reduced  Extended

Your staff:  Reduced  Extended

The comprehensive graphical overview allows you to check your settings at a glance, for each of your appointment types:

Public:	✓	To confirm:	-
Notifications:	✓	Clients only:	-
Recurring appts:	✓		
# of attendees:	1	Duration:	20m
# of min days:	1	# of max days:	30

You can easily clone existing appointment types. Simply click the following button, and use the drop-down menu to select a type to clone:

Clone Type From : TYPE 1 ▼



If you decide to delete a type, this will automatically cancel appointments of this type already scheduled. As a matter of course, you will be warned and have a chance to review those appointments.

### Step 3: create your schedule(s)



- **Add your schedule(s)**

→ Go to: “MY SETTINGS” > “SCHEDULES” > click Add a New Schedule or Resource :

First of all, you must create one or many schedules (next, you will be able to assign appointment types to the various time slots you will define, and customize them to your needs). You can use only one schedule for your company, or many schedules (in that case, each of them could potentially be booked separately). Your schedules may be tied to anything you'd like (staff persons, rooms, events, time periods...). Let us assume that you use one schedule per employee: as a result, your clients will be able to book some appointments with one employee in particular.



- **Customize your schedule(s)**

There are many options you can choose from: description, validity date...

* Title:	<input type="text" value="Chen's schedule"/>
Description:	<input type="text" value="Chen is a certified and licensed massage therapist. Helping people get relief from pain and relief from the stresses of daily life is her mission."/>
* Valid from:	<input type="text" value="01/01/2006"/> 
* Valid until:	<input type="text" value="12/31/2006"/> 

In this example, the schedule is tied to a staff member. Thus, each employee will be able to manage his own schedule, and each client will be able to make an appointment with the person of his/her choice.

In this example, the schedule has a one-year validity.

* Title:	<input type="text" value="Summer Planning"/>
Description:	<input type="text" value="Summer planning (outdoor activities)"/>
* Valid from:	<input type="text" value="05/01/2006"/> 
* Valid until:	<input type="text" value="09/30/2006"/> 

In this example, the schedule is tied to a time period. For example, you may have a summer schedule, for your outdoor activities.

In this example, the schedule is valid from May to September.

## ■ Set your workweek

→ Go to: “MY SETTINGS” > “SCHEDULES” > “Review & Make changes” > “WORKWEEK” section

You can set the workweek for each of your schedules: working days, working hours, lunch breaks... Simply set new time slots and assign appointment types to them:

### 1st time slot:

In this example, every hour, from 10.00am to 12.00pm, your clients would be able to choose between a thai massage and a swedish massage.

Public:	<input checked="" type="checkbox"/>
From:	10 AM :00
To:	noon :00
Interval:	60 (in minutes)
* Allowed types:	<div style="border: 1px solid #ccc; padding: 5px;">                 Relaxation session (30m)  <b>Thai massage (1h)</b>  <b>Swedish massage (1h)</b> </div> <p><small>Tip: you may select multiple types by holding the ctrl (windows) or apple (mac) key while clicking.</small></p>

### 2nd time slot:

In this example, you would offer relaxation sessions, every 30 minutes, from 1.00pm to 6.00pm.

When set to “public”, this time slot is available for online booking by anyone.

Public:	<input checked="" type="checkbox"/>
From:	1 PM :00
To:	6 PM :00
Interval:	30 (in minutes)
* Allowed types:	<div style="border: 1px solid #ccc; padding: 5px;"> <b>Relaxation session (30m)</b>                  Thai massage (1h)                  Swedish massage (1h)             </div> <p><small>Tip: you may select multiple types by holding the ctrl (windows) or apple (mac) key while clicking.</small></p>

Here is what you would get (breaks are automatically added by the system):

<u>Sunday</u>	<u>Monday</u>	<b>Tuesday</b>	<u>Wednesday</u>	<u>Thursday</u>	<u>Friday</u>	<u>Saturday</u>
10:00 AM to 12:00 PM every 1h:		Thai massage (1h) Swedish massage (1h)				[ <a href="#">MODIFY</a> ] [ <a href="#">delete</a> ]
-- BREAK (1h) --						
01:00 PM to 06:00 PM every 30m:		Relaxation session (30m)				[ <a href="#">MODIFY</a> ] [ <a href="#">delete</a> ]

Here are some examples of how our clients set their accounts. As you can see, our system is very flexible: some of our clients tie their schedules to a staff person, some of them tie their schedules to a specific time period, or use only one schedule for their whole company... everything is possible!

Business	Appointment types	Schedules	Assigned appointment types
Massage Therapist	<ul style="list-style-type: none"> <li>Thai massage</li> <li>Swedish massage</li> <li>Relaxation session</li> </ul>	Chen	<ul style="list-style-type: none"> <li>Thai massage</li> <li>Relaxation session</li> </ul>
		Laura	<ul style="list-style-type: none"> <li>Swedish massage</li> <li>Relaxation session</li> </ul>
		Sarah	<ul style="list-style-type: none"> <li>Relaxation session</li> </ul>
General practitioner	<ul style="list-style-type: none"> <li>Regular consultation</li> <li>Home visit</li> </ul>	Dr. John Doe	<ul style="list-style-type: none"> <li>Regular consultation</li> <li>Home visit</li> </ul>
Health Club	<ul style="list-style-type: none"> <li>Personal training</li> <li>Soccer</li> <li>Aqua aerobic</li> <li>Pilates</li> <li>Aerobic</li> </ul>	Summer schedule	<ul style="list-style-type: none"> <li>Personal training</li> <li>Soccer</li> <li>Aqua aerobic</li> </ul>
		Winter schedule	<ul style="list-style-type: none"> <li>Personal training</li> <li>Pilates</li> <li>Aerobic</li> </ul>
Tennis Club	<ul style="list-style-type: none"> <li>Tennis court</li> <li>Tennis lesson</li> </ul>	Tennis court A	<ul style="list-style-type: none"> <li>Tennis court</li> <li>Tennis lesson</li> </ul>
		Tennis court B	<ul style="list-style-type: none"> <li>Tennis court</li> <li>Tennis lesson</li> </ul>
		Tennis court C	<ul style="list-style-type: none"> <li>Tennis lesson</li> </ul>



If you would like to experience the appointment taking process from your clients' perspective (and thus check your settings), go to: "MY SETTINGS" > "LINKS" > "OPEN CLIENT VIEW"

## Step 4: set your time off

- **Add new time off records**

→ Go to: "MY SETTINGS" > "TIME OFF" > click [ [Add a new time off record](#) ]

You may add some time off records (be it 1 hour or an entire day) on the schedule of your choice. Time off should be used for non-recurring events (eg. vacations, meeting, exceptional event, sick days...).

- **Customize your time off records**

Use the calendar icons to set the beginning and ending dates. Your customers cannot make appointments during this period (the absence message will be displayed internally only).

* From:	9 AM	:	00	12/23/2005	
* To:	1 PM	:	00	01/02/2006	
* Reason:	Christmas holidays				

Then, you can review and even delete your existing time slots:

The screenshot shows a time off record for a schedule named 'melissa'. The record details include a duration of 10 days and 4 hours, starting on Saturday, December 23rd, 2005 at 09:00 AM and ending on Tuesday, January 2nd, 2006 at 01:00 PM. The reason is 'Christmas holidays'. There are callouts pointing to various parts of the interface:

- Name of the schedule on which you added a time off**: Points to the 'Schedule: melissa' label.
- Click here to add a new time off record on this schedule**: Points to the '[ Add a new time off record ]' button.
- Duration of the time off**: Points to the 'Duration: 10 day(s) and 4h' text.
- Click here to delete an existing time off record**: Points to the '[ delete ]' button.

## Step 5: manage the users

### ■ **Add new users**

→ Go to: “MY SETTINGS” > “ALL USERS” > click 

New users may be created to let other staff members access the customer area. Those users may be assigned to different schedules and may receive related email notifications (provided that the appointment types offered are set to send out notifications: you can define this for each type individually, under “appointment types” > “review and make changes”).

Enabled:	<input checked="" type="checkbox"/>
* Full Name:	<input type="text" value="Sandra Miller"/>
* Email:	<input type="text" value="smiller@your-address.com"/>
Access:	<input type="text" value="Administrator"/>
Schedules being monitored:	<div><input type="text" value="Paul's schedule"/> <input type="text" value="John's schedule"/> <input checked="" type="text" value="Sandra's schedule"/></div> <p><small>Tip: you may select multiple schedules by holding the ctrl (windows) or apple (mac) key while clicking.</small></p>

The password will be automatically generated, and sent to the email address you provided (of course, each user may change his / her password later on).

In this example, Sandra Miller will receive email notifications, each time an appointment (ie. only the types set to send out notifications) is made in "Sandra's schedule".

### ■ **Determine the users access level**

You can grant administrator privileges only to certain users. The difference is that the administrators will be able to manage billing, users, and company details.

<input type="text" value="Administrator"/>
<input checked="" type="text" value="Administrator"/>
<input type="text" value="Normal User"/>

By default the only user is yourself, and is granted administrator privileges. Use the drop-down menu to manage the users access level.

Then, you can easily check the users you added:

Full name: <b>Sandra Miller</b> [ administrator ]		[ <a href="#">Review &amp; Make changes</a> ] [ <a href="#">delete</a> ]
Enabled: 	<u>Receives email notifications for the following schedules:</u>	
Email: <a href="mailto:smiller@your-address.com">smiller@your-address.com</a>	- Sandra's schedule -	

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Congratulations! Now you're ready to accept appointments online!

Please feel free to contact us should you have any questions.

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