

# Appointments Online

The system that suits your schedule



[www.appointmentsonline.com.au](http://www.appointmentsonline.com.au)

# Appointments Online

## Set Up Guide and User Manual

This manual has been created as a reference guide to help with the initial set up and ongoing use of your Appointments Online account.

When signing up to Appointments Online, if you chose the free system setup option, there will be some steps in sections of this manual that will not be relevant to you. However, should you ever wish to alter aspects of your system, you may refer back to these sections when needed.

We highly recommend reading through this manual in order to get a feel for how the system works in its entirety and, should you need to, you can refer to specific sections as the need arises once you have begun utilising the system to its fullest within your business.

Should you require help with the system once you have logged on, you can contact us on (08) 6364 3796 or at [sales@appointmentsonline.com.au](mailto:sales@appointmentsonline.com.au). Dependent upon the level of assistance you require, a labour fee of \$19.95 per 15 minutes may be applied (charges will be advised before proceeding with any requests for assistance).

# Appointments Online

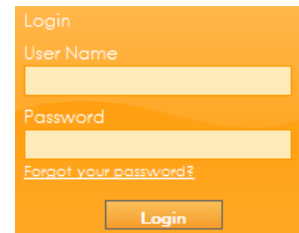
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# Appointments Online

## 1.0 LOGGING INTO APPOINTMENTS ONLINE

In order to setup your calendar and begin using the system, login via the Client Login screen located at [www.appointmentsonline.com.au](http://www.appointmentsonline.com.au). To login, enter the username and password that was provided to you in your Welcome Email.



## 2.0 INITIAL SETUP OF YOUR SYSTEM

After you log in for the first time, it is recommended that you familiarise yourself with the account management settings, located via the *Management* tab in the top menu. From this page, you are able to add customers, manage your services and appointment times and edit your business details. Follow the steps below to get going or simply head to <http://appointmentsonline.com.au/setup> and get us to do the heavy lifting for you!

### 2.1 EDITING YOUR BUSINESS DETAILS

To enter (or edit if your account has been setup already) your business details, click on *Edit Business Details* from the *Management* page.

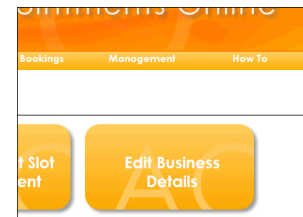
1. Enter/verify your company information and make any necessary changes (e.g. contact number, address, email addresses, website etc).

2. Make sure you set the **notification email**. This is where all communication about your account and bookings will be sent.

4. Add a Description of your business in the form of a brief summary of your services and organisation, which will be displayed for your customers to see.

5. Add Booking Instructions that are specific to your company, to assist your clients when making online appointments with you. These appear at the top of your Customer Booking Window.

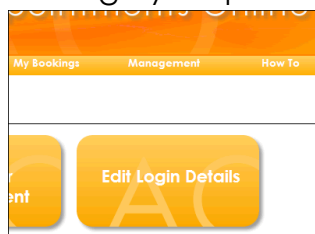
5. Click on **Save** at the end of the page to save changes.



### 2.2 EDITING YOUR LOGIN DETAILS

Your password is automatically set by the system when you sign up. The first time you log in to your account, it is recommended that you change your password for security measures. To change your password;

- 1) Click *Edit Login Details* via the *Management* tab.
- 2) Enter your new password and confirm.
- 3) Click **Save**.



# Appointments Online

## 3.0 GETTING TO KNOW THE SYSTEM

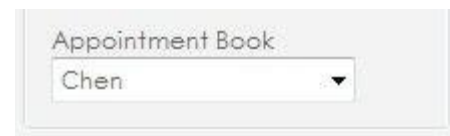
### 3.1 THE HOME SCREEN

Each time you login you will see your daily Appointment Book. This is your home screen, from here you can view all your upcoming



appointments. The current date is automatically selected, however you can pull up different days to view various bookings by changing the date in the View panel on the left hand side of the screen.

This panel also lets you move between Appointment Books, so you can pull up the different calendars for each of your staff members/resources that you allow customers to book appointments with.



### 3.2 NAVIGATING THE MENUS



The navigation of Appointments Online has been designed to be as simple and user friendly as possible.

The *Appointment Book* is your home screen – clicking this tab from anywhere in the system will take you back to this master page. *My Bookings* holds all the information relating to your bookings and includes a *Booking Search* feature.

The *Management* tab contains all of the advanced user settings that you would have seen when setting up your account. We highly recommend not changing any of these details unless necessary, as changes can impact the functionality of your system. Please refer to the information below regarding the options in this menu.

The *How To* tab is your online guide to the system, should you get stuck at any point while using the system. There are also Help icons throughout the pages of the site in case you need assistance with a particular function.

# Appointments Online

## 4.0 SETTING UP AND MODIFYING YOUR APPOINTMENT BOOK

Your Appointment Book is your online appointment diary, where all of your bookings are listed on a daily basis. Your Appointment Book is made up of the **services** you offer clients, and the **appointment slots** that will be made available to you and your clients.

### 4.1 SETTING UP THE SERVICES YOU OFFER

In order to create your schedule, you must first enter the details of each service your business offers. Services you create can be booked into by customers, or made available for your internal use only.

To create your service list, select *Service Management* via *Management* tab. To create a new service or modify existing services;

1. Click on the **Add New** button or select an existing service and click on the View/Modify buttons.
2. For each service you offer clients, enter a Service Name, the Time Required, the Price and a Description of the service.
3. If you accept online payments from clients, you will also need to select a Payment Option from the drop down box, specifying the method of Online Payment for each service (eg; Deposit Required, Payment Required In Full etc).
4. If you have SMS or Email Reminders enabled, and do not wish for them to be sent for particular services, tick to Block Scheduled Booking Reminders.
4. If this is a mobile service and you either require clients to enter a booking location during the booking

process or notify clients of a specific address we've assigned to your calendar, select the booking location rule that applies. (See Section 4.4 for more information on Booking Locations).

5. Click **Save** for the new or updated service.

**Update Service Details**

Service ID: 68

Service Name: Standard Consultation

Time Required(min): 30

Price(\$): 45.00

Description: After your initial consultation visit, subsequent sessions to work on your injury/complaint will be treated in the standard consultation session.

Payment Options: Full Payment Required

Booking Options: Customer Specified

Block Scheduled Booking: No Location

Email: Use Appointment Book Location

SMS: Customer Specified

# Appointments Online

## 4.2 ENTERING PAYMENT INFORMATION

If you have chosen to take online payments from clients, you will need to enter your details into the **Payment Integration panel**, accessible from the *Business Configuration* page.

Appointments Online provides the ability for you to take payments via PayPal or Secure Pay. Both methods have differing costs and benefits. Please speak to your account manager if you have any queries regarding taking payments from clients.

Please follow the steps below which relate to the payment provider you have chosen;

- 1) Enter your PayPal or Secure Pay Merchant ID in the first box
- 2) If using Secure Pay, enter your Merchant Password and select which cards you accept payment from.
- 2) Enter your Refund Policy—this WILL be displayed to your clients during the booking process.

### Payment Integration

To accept payments online via Credit Card from your clients at time of their booking, please select to turn Payment Integration on here. Please enter your PayPal Merchant ID below. Should these details change, ensure you update details here or your PayPal Payment Portal will not work when clients request bookings.

[Login to your PayPal Business Account](#) | [Visit PayPal's Help Centre](#)

PayPal Merchant ID:

Refund Policy:

Enable Payment Integration:

- 3) Once you have checked your services and are happy with the online payment methods for each, tick the box marked **Enable Payment Integration** - this will make the payment option visible to your clients. **Note:** Until this box is ticked, your clients WILL NOT be able to see or use the payment function in your booking system.

# Appointments Online

## 4.3 CUSTOMISING APPOINTMENT REMINDERS

If you have chosen to enable **booking reminders** in your system, you will need to configure the type of reminder (email or SMS) and frequency they are sent to your clients. You can request the addition of this functionality via the **Account Configuration panel** in the *Business Configuration* page.

Once enabled, Appointments Online provides the ability for you to send reminders to your clients, at pre-determined times before their appointment. You can send as many or as few reminders as you would like to clients.

Please follow the steps below to configure your booking reminders via the *Business Configuration* page via the *Management* tab;

1) Select whether you would like to enable SMS or Email reminders.

2) Enter a short Business Name, so that your clients know who the SMS reminder is coming from.

2) If sending SMS reminders, you will need to purchase SMS credits and ensure you always have value in your account. Click [Buy More SMS Credits](#) to purchase more credits for your account via PayPal. (If your SMS credits run out, the system will send email reminders only to your clients until credits are purchased).

3) You need to schedule the type and frequency of reminders that will be sent to your clients. Click **Add New Booking Reminder**. Select the time you would like the reminder to be sent, and the method (SMS or Email). Click **Add** to save. To change a reminder, delete it from the list, and recreate.

### Booking Reminder Settings

**Settings**

Send Reminders Via:  Email  SMS

Short Business Name: (For SMS, 15 Characters)

Remaining SMS Credits: 151 [Buy More SMS Reminder Credits](#)

**Buy More SMS Credits**

[Buy 50 Credits - \\$7.50](#)      [Buy 250 Credits - \\$35](#)

[Buy 500 Credits - \\$65.00](#)      [Buy 1000 Credits - \\$120](#)

**Schedule**

[Add New Booking Reminder](#)

Time Before	1 Credit = 1 SMS		Send SMS	
3 Minutes	<input checked="" type="checkbox"/>		<input type="checkbox"/>	✗
2 Minutes	<input type="checkbox"/>		<input checked="" type="checkbox"/>	✗
1 Minutes	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	✗



# Appointments Online

## 4.4 CUSTOM BOOKING LOCATIONS

If your business offers mobile appointments or if you have multiple calendars which require different addresses, Appointments Online allows you to enter or request a booking location for each appointment.

There are two forms of Booking Location, which are attached to specific services you offer;

- a) **Appointment Book Location** - to be used by businesses that have different addresses for each Appointment Book they use.  
[Contact us](#) to have an address stored against your calendar.
- b) **Customer Specified Location** - to be used by businesses that take mobile bookings. This allows you and your clients to enter the address at which the appointment will take place.

Once you have entered a Booking Location for your services, your clients will be asked to enter an address as a *required* field during the booking process, or by yourself when entering a booking manually into the system.

Booking Request Details

Please select the method you would like the business to use when confirming your appointment and any special requirements or requests for your booking.

Confirmation Method  Phone  Email

Confirmation Email Address  [Use Current Email Address](#)

Booking Location   
  
(This service requires an address to be entered. Please enter the location at which the booking will occur).

The location is stored against each booking. It is important to remember that this is not saved in the system as a customer address. If you or your client makes a subsequent booking, the system will remember and

End Date

July 2012						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

use the last Booking Location entered, or you can enter a new location per appointment.

Booking Location   
  
[Use Appointment Book Default](#) | [Use Customer Default](#)

The location of the booking will appear on all emails and entries in the system relating to that appointment.

# Appointments Online

## 4.4 SETTING UP YOUR APPOINTMENT SLOTS

Now that your services are entered, you need to create schedules for yourself and your staff/resources. Your schedules are laid out in your daily Appointment Book, and show the available appointment slots you and your clients are able to book into each day.

To setup your schedule showing the days/times you open, we use templates that the system calls on to populate your diary with these appointment spaces. You tell the system the services offered at each particular time during the week. Each of these times is called an **appointment slot**. Entering in your appointment slots will create what we term a Range Template that runs indefinitely until you change your schedule. This Appointment Slot Template is integral to the system, and provides the basis for how you make and take bookings.

To create or change your appointment schedule;

1. Click on *Appointment Slot Management*, from the *Management* tab. Here you can view or delete existing schedules.
2. Click **Add New** to add a new schedule.
3. Select the Appointment Book and Start Date for your schedule.
4. Enter a template name (eg: the date, or "school holidays" etc). Click **Next**.
5. If you have an existing template in the system that you have been using and would like to modify you can choose to Copy an Existing Template (this is handy if you need to add a new service to an existing schedule)

### Create Appointment Slot Template Wizard - (Range)



The following pages will guide you through the creation of a new Range Appointment Slot Template.

Template Details   Copy Existing Template   Appointment Slots   Finalise

**Step 1: Enter Template Details**

Please select the Appointment Book you would like to create this Template for, as well as a start date for the Template. Then name the Template to help you identify it later.

Select Appointment Book:

Start Date: 

March 2010						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
22	23	24	25	26	27	28
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Template Name:

<< Previous   Next >>

# Appointments Online

## 4.4 SETTING UP YOUR APPOINTMENT SLOTS (cont'd)


6. Enter the Time (showing, minutes, hours and am/pm) you start taking appointments, and tick the service/s offered at this time. Then click **Save**.
7. Adjust the Time boxes to reflect when your next service starts, tick the service/s offered and click **Save** (eg: if you offer hourly services, open services each hour for people to book into). **Repeat** for all the slots you offer during that day.  
The system is highly configurable and you can open services at 5 minute increments should you wish or offer only certain services during certain times of the day/week.
8. Once you have entered all appointment slots for Monday, click the Tuesday tab above that runs across the middle of the screen. Populate the slots for each day of the week you open.

NOTE: You can copy slots from Monday to Tuesday, by selecting **Copy Existing Day Template** in the right hand corner.

9. If you choose to Copy Existing Day Templates, or if you make any mistakes, you can add or delete individual slots from your schedule templates as you move through each day, to reflect the appointment times you offer your customers currently.
9. Make any final changes as needed and click **Next**. Confirm that you are happy with your Appointment Slots and click **Save**.

### Create Appointment Slot Template Wizard - (Range)

The following pages will guide you through the creation of a new Range Appointment Slot Template.



Template Details   Copy Existing Template   Appointment Slots   Finalise

**Step 3: Enter Appointment Slots**

Please enter in the appointment times you currently run for each service you offer.

To add an Appointment Slot, enter the start time and select the services you wish to run at this time. Click Save to add the Appointment Slot to your Template. You can also delete individual Appointment Slots as needed.

To save time you can easily copy Appointment Slots between the days of the week:

Monday   Tuesday   Wednesday   Thursday   Friday   Saturday   Sunday

**Monday** [Copy Existing Day Template](#)

**Add / Edit Appointment Slot**

Day Of Week: Monday

Time: 10:00:AM

Service List:  Select All  
 Consultation - Location A    Extended Consultation    Standard Consultation    Treatment  
 Consultation - Location B    Initial Consultation

Clear   Save

Time	Services	
08:00 AM	Consultation - Location A   Extended Consultation   Standard Consultation	X
08:30 AM	Consultation - Location A   Consultation - Location B	X
09:00 AM	Consultation - Location A   Extended Consultation   Standard Consultation	X
09:30 AM	Consultation - Location A   Consultation - Location B	X

<< Previous   Next >>

TIP: You must create an Appointment Template, following the above steps, for each Appointment Book. Or, [just get us to do it for you!](#)

# Appointments Online

## 4.5 ALTERING YOUR APPOINTMENT SLOTS

Should you need to alter your template schedule and the appointment slots you offer your customers, your Appointment Book allows you to create a Day Override Template, to alter single days in your calendar without affecting the rest of your schedule. A Day Override Template will allow you to add or delete individual appointment slots to your calendar, in case you have an unexpected, and one-off change to your schedule

To change the appointment times you offer on a single day within your calendar, without affecting the other days in your appointment template;

- 1) Select the date you wish to override from the calendar panel within the relevant Appointment Book on the home screen.
- 2) Click **Override Day Template**
- 3) Enter a name for the Day Override Template, so you can recall it later.
- 4) The Appointment Slots you currently offer are displayed. Add or delete slots as necessary to match your needs.
- 5) Once you are happy with the changes, click **Next**, and then **Save** if you wish to lock in the Day Override in your calendar.

### Create Appointment Book Slot Template Wizard - (Day Override)

The following pages will guide you through the process of overriding the Appointment Slots available on a single day for an Appointment Book. This enables you to change the appointment times you offer for a one-off change to your schedule. To make this change permanent, please create a new Range Appointment Slot Template.

Override Details Appointment Slots Finalise

**Step 2: Enter Appointment Slots**

The current Appointment Slots running on this day are listed below.

To add an Appointment Slot, enter the start time and select the services you wish to run at this time. Click Save to add the Appointment Slot to your Template. You can also delete individual Appointment Slots as needed.

**Add / Edit Appointment Slot**

Time: 04:00 PM

Service List:  Select All  Consultation - Location A  Extended Consultation  Standard Consultation  Treatment  Consultation - Location B  Initial Consultation

Clear Save

Time	Services	
03:00 PM	Consultation - Location A Consultation - Location B	X
04:00 PM	Consultation - Location A Consultation - Location B Extended Consultation	X

<< Previous Next >>

### Appointment Book

This page displays your appointment calendar, and daily appointment book.

View

View By

Appointment Book

Sydney

March 2010

Mon	Tue	Wed	Thu	Fri	Sat	Sun
22	23	24	25	26	27	28
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

**My Daily Appointment Book**

Friday, 02 April 2010

Override Day Template

Initial Consultation, Standard Consultation, Extended Consultation, Consultation - Location A, Consultation - Location B, Minor Service, Major Service, MyService, tService, NoPayment, Treatment, tService, FullPaymentRequired, Test Service, tEST, Service, DeposistRequired, FullPaymentOptional, New Test, New Test 2,

8:00 AM

Initial Consultation, Standard Consultation, Extended Consultation, Consultation - Location A, Consultation - Location B, Minor Service, Major Service, MyService, tService, NoPayment, Treatment, tService, FullPaymentRequired, Test Service, tEST, Service, DeposistRequired, FullPaymentOptional, New Test, New Test 2,

9:00 AM

# Appointments Online

## 5.0 MAKING AND TAKING BOOKINGS

Although the premise behind Appointments Online is to have your clients book online with you so you don't have to take phone calls and add in appointments yourself, the system is able to take and manage manual bookings also.

### 5.1 ENTERING BOOKINGS MANUALLY

There are two methods for inputting a manual booking for a single appointment. The first is from your Appointment Book home screen;

- 1) From your home screen, select the date that your customer would like to make the appointment on, and the appointment book they wish to book into.
- 2) Click on the time slot and the corresponding service they would like from the list of available slots that open up on the right side of the page.
- 3) Select the name from your list of customers. If it is a new customer, select **Add New Customer** and input their details.
- 4) Select the confirmation method the customer would prefer (NB: email confirmation method will send an automatic email to your customer notifying them of their appointment with you. If you select phone as the method of confirmation, you will need to call/text your client).
- 5) If the customer requires a longer than usual appointment for any reason, you can alter the Finish Time for the booking in the *Appointment Slot Details* section.
- 6) Enter a Booking Location if required for the appointment.
- 7) Select a Booking Payment Status for the appointment.
- 8) If needed, you can enter a Private or Public note.
- 9) Once you are happy that the details are correct, select **Save** and the booking will be added to your calendar.

A yellow button with rounded corners and a subtle shadow. It features a large, faint 'A' and 'C' in the background. The text 'Create New Booking' is centered in a white, sans-serif font.

The second method for inputting a manual booking is to select *Create New Booking* from the *My Bookings* tab;

- 1) Follow steps 3 and 4 above.
- 2) Manually select a service, start date, finish date, start time and finish time in the **Appointment Slot Details** section.
- 3) Follow steps 6 through 9 above.

# Appointments Online

## 5.0 MAKING AND TAKING BOOKINGS (cont'd)

### 5.1.1 ENTERING RECURRING APPOINTMENTS

For those clients who offer recurring appointments, Appointments Online gives you the ability to set these up on behalf of your clients. To create a recurring booking;

- 1) Follow steps 1-4 above to enter your customers details
- 2) Click *Recurring* under the **Appointment Slot Details** section. The screen will change as below

#### Appointment Slot Details

Appointment Book

Physiotherapist 1

Service

Full Consultation

Appointment TimeZone

Single or Recurring Appointment  Single Appointment  Recurring

#### Recurring Booking

Starting on

Occurring  times in total

Repeating every

on a **Thursday** at

Duration (mins):

- 3) Enter the Start Date, Occurrence, and Frequency. You can edit the pre calculated Start Time and Duration if required.
- 4) Click *Check Availability*.
- 5) A list of available times will appear. Tick all that you would like to book the client into.
- 6) Follow steps 6-9 above.

Slot Date/Time	Availability	Book
Mon 07/04/2014 11:00 AM to 11:30 AM	Available	<input checked="" type="checkbox"/>
Mon 14/04/2014 11:00 AM to 11:30 AM	Available	<input checked="" type="checkbox"/>
Mon 21/04/2014 11:00 AM to 11:30 AM	Available	<input checked="" type="checkbox"/>
Mon 28/04/2014 11:00 AM to 11:30 AM	Available	<input checked="" type="checkbox"/>
Mon 05/05/2014 11:00 AM to 11:30 AM	Available	<input checked="" type="checkbox"/>
Mon 12/05/2014 11:00 AM to 11:30 AM	Available	<input type="checkbox"/>
Mon 19/05/2014 11:00 AM to 11:30 AM	Available	<input type="checkbox"/>

# Appointments Online

## 5.0 MAKING AND TAKING BOOKINGS (cont'd)

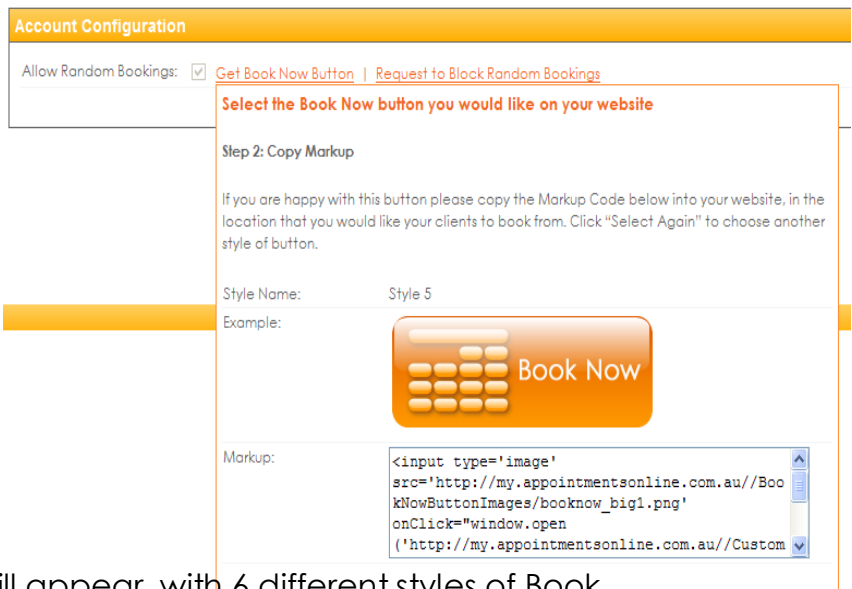
### 5.2 TAKING BOOKINGS ONLINE

By placing the **Book Now button** on your website, you are freed up to take care of other areas of your business, while your appointment slots continue to get filled up with clients booking appointments themselves.

We refer to this functionality as Random Bookings which you can request from the *Business Configuration* page within the system.

Once you have requested Random Bookings, simply follow the 7 steps below to link your AO appointment system to your website;

- 1) Navigate to the *Management* page.
- 2) Select the *Business Configuration* tab.
- 3) In the second box labelled **Account Configuration**, click the **Get Book Now Button** Link.



Account Configuration

Allow Random Bookings:  [Get Book Now Button](#) | [Request to Block Random Bookings](#)


Select the Book Now button you would like on your website

Step 2: Copy Markup

If you are happy with this button please copy the Markup Code below into your website, in the location that you would like your clients to book from. Click "Select Again" to choose another style of button.

Style Name: Style 5

Example:



Markup:

```
<input type='image'  
src='http://my.appointmentsonline.com.au//BookNowButtonImages/booknow_big1.png'  
onClick="window.open  
( 'http://my.appointmentsonline.com.au//Custom
```

4) A popup window will appear, with 6 different styles of Book Now button. Choose the version of the Book Now button you would like on your website, and click on it.

5) Another window will popup, that holds the Markup Code you will need to copy and paste into your website where you would like the Book Now button to display.

6) Copy the markup code that appears in the scroll box at the bottom of the window. This is the code that you will need to place in your website in the location that you choose (or give to your web developers for them to place) in order to bring up the **Booking Calendar** of your business.

7) If you click the Book Now image again, you will be taken to the booking window your clients see. You can also copy and paste the URL for that window and send the link to your clients directly

Once you have followed the above steps, the link will appear on your website, with online booking requests automatically integrated into your system. For further information or assistance please contact us at any stage on (08) 6364 3796 or via email [sales@appointmentsonline.com.au](mailto:sales@appointmentsonline.com.au)

# Appointments Online

## 5.0 MAKING AND TAKING BOOKINGS (cont'd)

### 5.3 THE ONLINE BOOKING PROCESS

Giving your customers access to book online with you allows them to see available appointment times in your calendar and request the booking time (at no time do they see details of other appointments you have, or whether you have had cancellations or other bookings).

To book online with you, your customers go through a simple 5 step process. They are guided through selecting your business, the staff member and service they require, an appointment date and time and then the method of confirmation that they would like to utilise.

If you have enabled payment functionality, your client will also pay at the final stage of the booking process.

Make an appointment with

**Physiotherapist Test**

ABN : 1234-1234-1231  
C / 79 Kintail rd, Applecross, Tasmania, 6450

933755650  
12312312311  
Enquiries@AppointmentsOnline.com.au

*Your Physio Therapist*

1 **Select Book & Service**   2 Select Appointment   3 Login / Sign Up   4 Booking Request Details   5 Finalise Booking

Please select the Appointment Book of the staff member or business resource you wish to make the appointment with, and the service you require from the list available.

**Select Appointment Book**

Service Name	Duration (min)	Price	Payment	Description	
Consultation - Location A	60	\$150.00	▪ Make Payment of Deposit Required (\$1.00)	testing description.	Select
SMS Test	60	\$10.00	▪ Online Pre-Payment Not Required		Select
Standard Consultation	30	\$45.00	▪ Make Payment in Full (\$45.00)	After your initial consultation visit, subsequent sessions to work on your injury/complaint will be treated in the standard consultation session.	Select
Test Service One	30	\$75.20	▪ Online Pre-Payment Not Required	This is a test service.	Select



# Appointments Online

## 5.0 MAKING AND TAKING BOOKINGS (cont'd)

### 5.3 THE ONLINE BOOKING PROCESS (cont'd)

All bookings requested by clients are tentatively added to your appointment diary to avoid double bookings and queued up in your *Awaiting Confirmation* page (which is accessible from the *My Bookings* tab).

Booking Requests							
Number of records found: 2							
Booking ID	Appointment Book	Appointment Date/Time	Days Until	Service Name	Customer	Confirmation	
62006	Physiotherapist One1	Mon, 06/Aug2012 09:30 AM - 10:00 AM	14	Standard Consultation	<a href="#">Miss Sharon Taylor</a>	sharon@appointmentsonline.com.au(EMAIL)	
Location		123 Fake Street Suburb A WA 6000					
Customer Booking Request Note							
Booking Payment Details		Fully Paid Pending Booking Amount (\$)    Amount Owning (\$) \$45.00                    \$45.00					
Functions		<input type="button" value="Confirm"/> <input type="button" value="Decline"/>					

From here the booking is able to be approved or declined, along with a confirmation or decline note entered. The system will then notify your client by email accordingly.

If you accept the booking request, it is automatically added to your calendar and the booking status changes to confirmed.

Note: Appointments Online has the ability to automatically confirm all booking requests you receive. Please contact your account manager to turn on this functionality.

# Appointments Online

## 5.4 THE ONLINE PAYMENT PROCESS

If you accept **online payments** using PayPal from clients during the booking process, they will follow the same procedure as above to make a booking with you, however they will get redirected to the PayPal website to complete their payment to you.

It is your responsibility to log into the PayPal website and match up the booking request you have received from your client, with the payments in you PayPal account. You must also request the funds from your PayPal account be transferred to your normal bank account. \*\*\*The Appointments Online system does not automate this for you.

Step 9: Finalise

Please confirm the below details are correct and click Submit to finalise your booking. If you would like to change any details, simply click Previous below to return to past steps.

**Review Booking Details**

Booking For: [Redacted]

Business Booking With: Physiotherapist Test (19)  
Appointment Book Booked On: Physiotherapist One (38)

Service Booked: Test Service One (478)  
Booking Time: Wed, 25/Nov/2009 01:00 PM - 01:30 PM

Booking Price: \$75.00

Confirmation Method: EMAIL  
Confirmation Contact: [Redacted]

Booking Request Note:  
Do you have parking at your premises?

**Online Booking Payment Details**

Online Payments powered by For more information click [here](#).

Booking Payment Options:  Make Payment of Deposit Required (\$10.00)  
 Make Payment in Full (\$75.00)

Transaction Amount (GST Inclusive): \$10.00

**Credit Card Details**

Card Type: Visa  
Card Number: [Redacted]  
CVV: [Redacted]  
Expiry Date: 01 / 10

Powered By

NB: Payments taken via Secure Pay are fully integrated with your Appointments Online system and bank account. No bookings will be added to your calendar without successful payment and funds are deposited to your account directly.

### Bookings Awaiting Confirmation

This page displays requests for bookings awaiting your confirmation.

Booking ID	Appointment Book	Appointment Date/Time	Days Until	Service Name	Customer	Confirmation
7517	Physiotherapist One	Wed, 25/Nov/2009 08:00 AM - 08:30 AM	6	Test Service One	[Redacted]	(EMAIL)
Customer Booking Request Note		345				
Booking Payment Details		Fully Paid				
		Booking Amount (\$) Amount Owing (\$)				
		\$75.00 \$0.00				
Functions		<input type="button" value="Confirm"/> <input type="button" value="Decline"/>				
7738	Physiotherapist One	Wed, 25/Nov/2009 02:00 PM - 02:15 PM	6	Test Service Three	[Redacted]	(EMAIL)
Customer Booking Request Note		234				
Booking Payment Details		Fully Paid				
		Booking Amount (\$) Amount Owing (\$)				
		\$30.00 \$0.00				
Functions		<input type="button" value="Confirm"/> <input type="button" value="Decline"/>				

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Once the paid appointment is sent to your system, you can track the details as below;

- 1) The booking request is sent to your appointment diary and queued up in your *Awaiting Confirmation* page (which is accessible from the *My Bookings* tab)
- 2) The booking will have the amount the customer transferred to you listed with the note Pending against it. This is your reminder to log into PayPal and confirm the payment and transfer it to your bank account.

- 3) Use the Booking ID number as the reference to match up the payment in PayPal, under the Item Number field in the PayPal system.

# Appointments Online

## 5.5 BOOKING CANCELLATIONS

By default, all systems allow customers to cancel bookings if not less than 24 hours before the appointment time. Cancellation allowances are customisable to suit your needs. Please contact your account manager to set yours as required.

During the booking process, your clients are given the opportunity to be added to a cancellation wait list. At Step 2, they can tick the box which will add them to this list, and should an earlier appointment become available in the same appointment book the system will send them an automated notification alerting them to this.

If clients wish to accept the new, earlier space offered, they will be directed back to the Booking Window to accept the new space and remove their original booking from your system.

24	25	26	27	28	29	30
31	1	2	3	4	5	6

 = Slots Available

1 Available Appointment Slots Found

[Find Next Available Slot](#)

**Cancellation Option:** Please place me on a cancellation list and notify me if any earlier appointments become available.

Service	Start Time	End Time	Minutes	
Full Consultation	9:30 AM -	10:30 AM	60	<a href="#">Book</a>

## 6.0 BOOKING MANAGEMENT

Once you have entered bookings manually, or accepted a booking request from a client, they will be viewable from your *Appointment Book home page*.

If you have more than one Appointment Book in your system, you can cycle through the different calendars for your staff members via the **View** panel on the home screen. As you do, you will notice that the calendar on the left hand corner changes slightly. This reflects the different bookings that have been made with your various staff members, as determined by the legend directly underneath the calendar.

# Appointments Online

## 6.1 VIEWING AND EDITING APPOINTMENT DETAILS

To view and change details of a specific appointment follow the below steps;

- 1) Select the relevant Appointment Book.
- 2) Select the date from the calendar.
- 3) Select the appointment from the list that is generated on your screen.
- 4) The full details of the appointment are now brought into view for you to review/edit.
- 5) From here, you can change any details from the 3<sup>rd</sup> section of the screen headed *Appointment Slot Details*. You can change the Appointment Book, service, start and end times as well as the date of the booking.
- 6) You can also add in a Private or Public Booking Note at the bottom of this page, should you need to make a note against the appointment for other workers in your business to view.
- 6) If you have SMS or Email reminders enabled, you can choose to block them from being sent for this specific booking.
- 7) When you are happy with your changes, click **save**.

To delete a booking;

- 1) Follow steps 1 through 4 above.
- 2) At the bottom of the screen click **delete**, and the booking will be removed from your diary. A cancellation email will be sent to yourself and your client.

# Appointments Online

## 6.2 BOOKINGS SEARCH

### Booking Search


In order to view and edit your bookings without having to manually search through your Appointment Book/s there is an automatic search feature that you can use to bring up and change your appointments.



From the *My Bookings* tab, select *Booking Search* and follow the below steps;

- 1) Enter in the Search Criteria that you would like to use in order to find your appointment/s. You can search by Appointment Book, Appointment Status (Confirmed, Cancelled, Awaiting Confirmation), Service, Customer Name or Booking Date.
- 2) Once you have found the appointment you are searching for, click the **Pen and Paper icon** on the left hand side of the appointment line. This will take you to the page that allows you to edit details of the appointment. Once you have made the changes you require, select **save**.


To sort the results, click a column heading to order by ascending/descending value.

You can export the entire list of bookings generated to an Excel spreadsheet, by clicking **Export** at the bottom of the page, so you can view and sort through your records as a .CSV file.

 Search Criteria

Booking ID	<input type="text"/>
Appointment Book	<Appointment Book> ▼
Current Status	<Status> ▼
Booking Marker	<input type="checkbox"/>
Booking Type	<input checked="" type="radio"/> All <input type="radio"/> Customer Appointment <input type="radio"/> Other Booking
Service	<Services> ▼
Customer Name	<input type="text"/>
Customer Organisation	<input type="text"/>
Booking Date From	01/Aug/2012 
Booking Date To	31/Aug/2012 
Booking Note (private + public)	<input type="text"/>

Number of records found: 10

	Booking ID	Appointment Book	Status	Appointment Date/Time	Booking Marker	Booking Type	Booking Details
	48482	Mac Technician - Sean	AWC	Fri, 03/Feb/2012 09:45 AM - 10:00 AM	<input type="checkbox"/>	CUSTOMER_APPOINTMENT	<b>Customer Name:</b> Mr Gerry Alleaume <b>Service:</b> Apple Repair: Out-of Warranty Machine Diagnosis

# Appointments Online

## 7.0 CUSTOMER MANAGEMENT

Once you start taking bookings online, your client details are stored in a database within the system. This is accessible by selecting *Customer Management* from the *Management* tab.

Appointments Online distinguishes your customers as either Registered or Non-Registered Users.

Registered Users have online access and can make booking requests with your business via the 5 step booking process. Non-registered Users are customers that you have made manual appointments for, but have never booked online with you.

You can take appointments from either type of user, it is just their ability to make bookings online that changes. Once a client makes a booking with you, they are automatically added to your customer database.

To add a customer (either Registered or Non-Registered) manually into your database, navigate to the *Customer Management* page from the *Management* tab, and follow the steps below;

1. Click **Add New**.
2. Enter the customers details.
3. Tick whether you would like this customer to be a Registered or Non-Registered customer.
4. If you ticked **Register User**, you will need to enter a Username and Password so your customer can login to the website and make an online booking with you.
5. The time zone for your client will default to your own. Change this as needed.
6. Click **Save** to add the customer to your Appointments Online client database.
7. An email will automatically be sent to your customer, welcoming them to the Appointments Online community.

**TIP:** Your clients email address needs to be set as the username, as an email address is always unique. You can search for clients to add by clicking **Find** in the top right hand corner, and entering their email username in the box and hitting **Go**

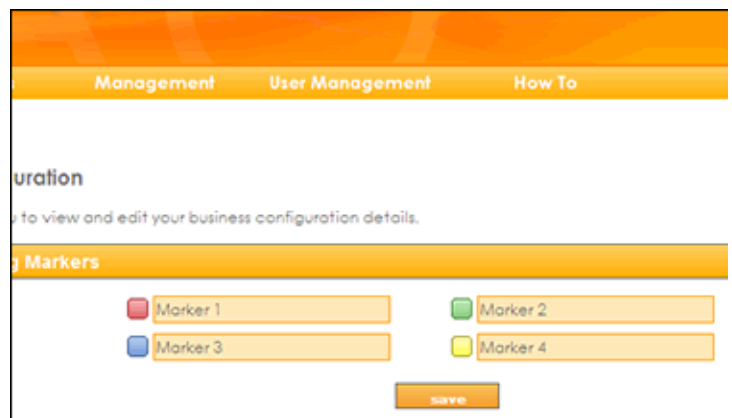
A list of the customers associated with your business can be found on this page also. From here you can search through, view, edit or delete customer records, or click **export** to send your customer database to an Excel spreadsheet.

# Appointments Online

## 8.0 CUSTOMISING YOUR BOOKINGS

To enhance the functionality of your appointment book, you can assign specific markers to each of your appointments in the *Business Configuration* page. By assigning **custom booking markers** to your appointments you are able to sort and track bookings based on categories specific to your business.

There are four different markers you can label and assign to appointments, depending on your individual requirements. For instance, you may label the first marker "Unconfirmed" to show that the appointment has been booked into your calendar but is awaiting confirmation by yourself or your receptionist. Other markers could be named "Appointment Confirmed" or "Please Confirm Appt 24 hours prior" depending on your needs.



Management User Management How To

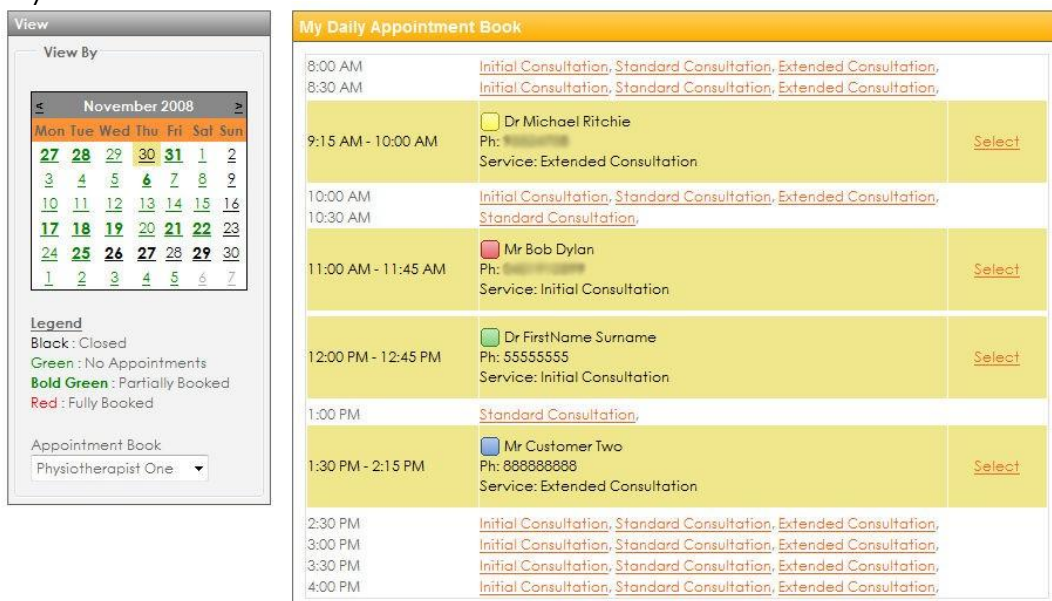
uration  
to view and edit your business configuration details.

Markers

Marker 1 Marker 2  
Marker 3 Marker 4

save

Once you have labelled your markers you will be able to assign them against appointments and change them as needed. You can also search based on these markers which is helpful if you need to confirm appointments 24 hours in advance for example, as you can simply select to see all appointments with this coloured marker and a list of appointments is displayed.



View

View By

November 2008

Mon Tue Wed Thu Fri Sat Sun

27 28 29 30 31 1 2  
3 4 5 6 7 8 9  
10 11 12 13 14 15 16  
17 18 19 20 21 22 23  
24 25 26 27 28 29 30  
1 2 3 4 5 6 7

Legend  
Black : Closed  
Green : No Appointments  
Bold Green : Partially Booked  
Red : Fully Booked

Appointment Book  
Physiotherapist One

My Daily Appointment Book

8:00 AM	Initial Consultation, Standard Consultation, Extended Consultation,
8:30 AM	Initial Consultation, Standard Consultation, Extended Consultation,
9:15 AM - 10:00 AM	<input type="checkbox"/> Dr Michael Ritchie Ph: [REDACTED] Service: Extended Consultation <a href="#">Select</a>
10:00 AM	Initial Consultation, Standard Consultation, Extended Consultation,
10:30 AM	Standard Consultation,
11:00 AM - 11:45 AM	<input checked="" type="checkbox"/> Mr Bob Dylan Ph: [REDACTED] Service: Initial Consultation <a href="#">Select</a>
12:00 PM - 12:45 PM	<input checked="" type="checkbox"/> Dr FirstName Surname Ph: 55555555 Service: Initial Consultation <a href="#">Select</a>
1:00 PM	Standard Consultation,
1:30 PM - 2:15 PM	<input checked="" type="checkbox"/> Mr Customer Two Ph: 88888888 Service: Extended Consultation <a href="#">Select</a>
2:30 PM	Initial Consultation, Standard Consultation, Extended Consultation,
3:00 PM	Initial Consultation, Standard Consultation, Extended Consultation,
3:30 PM	Initial Consultation, Standard Consultation, Extended Consultation,
4:00 PM	Initial Consultation, Standard Consultation, Extended Consultation,

# Appointments Online

## 9.0 CHANGES TO YOUR SYSTEM CONFIGURATION

If at any stage, you wish to alter your system in order to either start/stop taking bookings on your website, add/remove SMS and Email Reminders, or add/remove the option for clients to pay online for their appointment, this can be done from the *Business Configuration* page.

### Account Configuration

Allow Random Bookings:  [Get Book Now Button](#) | [Request to Block Random Bookings](#)

Accept Payment Integration:  [Request to Change Payment Integration Provider](#) | [Request to Remove Payment Integration](#)

### Payment Integration

To accept payments online via Credit Card from your clients at time of their booking, please select to turn Payment Integration on here. Please enter your PayPal Merchant ID below. Should these details change, ensure you update details here or your PayPal Payment Portal will not work when clients request bookings.

[Login to your PayPal Business Account](#) | [Visit PayPal's Help Centre](#)

PayPal Merchant ID:

Refund Policy:

Enable Payment Integration:

[Save](#)

The *Business Configuration* page is also where you will enter or change your Payment Integration details, and your Appointment Reminder Schedule for SMS and Email reminders to clients.

### Booking Reminder Settings

#### Settings

Send Reminders Via:  Email  SMS

Short Business Name: (For SMS, 15 Characters)

Remaining SMS Credits: 151 [Buy More SMS Reminder Credits](#)

[Save](#)

#### Schedule

[Add New Booking Reminder](#)

Time Before Booking	Send Email	Send SMS	
3 Minutes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	✗
2 Minutes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	✗
1 Minutes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	✗



# Appointments Online

## 10.0 APPOINTMENTS ONLINE TROUBLESHOOTING

Should you run into trouble at any point or require assistance with certain aspects of the system, you can view *Help Topics* from the *How To* tab on the top menu bar.

We have a comprehensive FAQ page continually being updated at <http://www.appointmentsonline.com.au/content/content/faq.html>

We're also available on Facebook to answer any queries.  
<https://www.facebook.com/AppointmentsOnline>

There are also **Help Icons** placed throughout the site to pull up step by step instructions relating to that section of the system.

Should further assistance be required, or if you have questions that are not covered within our manuals or help sections, please email [accounts@appointmentsonline.com.au](mailto:accounts@appointmentsonline.com.au)