

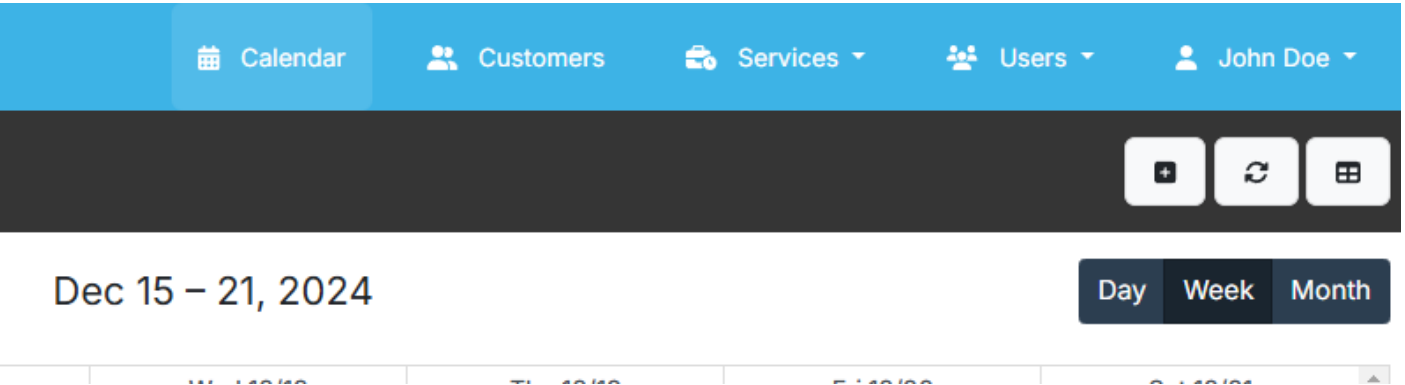
# Using Appointment Scheduling

The Appointment Scheduling Application provides a comprehensive platform to manage appointments, customers, services, and user roles while offering customizable settings and integrations.

## 1. Header Navigation Overview

After logging in, the application header contains the following sections:

- Calendar: View and manage schedules.
- Customers: Manage customer information and appointments.
- Services: Includes *Services* and *Categories* management.
- Users: Dropdown for managing user roles: *Providers*, *Secretaries*, and *Admins*.
- User: Dropdown with *Settings*, *Account*, and *About*.



## 2. Calendar

The Calendar Tab displays a table with Date and Time slots. Users can:

- View schedules by **Day, Week, or Month**.
- **Click on a specific Date/Time slot to manage appointments.**

All

<

>

Today

Dec 15 – 21, 2024

Day

Week

Month

	Sun 12/15	Mon 12/16	Tue 12/17	Wed 12/18	Thu 12/19	Fri 12/20	Sat 12/21
All Day							
7 am							
8 am							
9 am			9:15 am - 9:45 am Service - Ryan Chams				
10 am							

Managing Appointments

1. Click on a Date/Time slot.
2. Choose between:
- Unavailability: Mark specific time as unavailable.

• Appointment: Schedule an appointment.

Tue 12/17

Wed 12/18

Thu 12/19

Add New Event

×

What kind of event would you like to add?

Unavailability

Appointment

3. If **Appointment** is selected, fill out the following details:
- Service

• Provider

• Color (visual representation)

• Start Date/Time and End Date/Time

• Timezone

• Location

• Notes

• Status
4. Fill in the **Customer Details Section**:
- First and Last Name

• Address

• City

• Zip Code

• Phone Number

• Language

5. Click **Save** to finalize the appointment.

## New Appointment

### Appointment Details

Service \*

Service

▼

Start Date / Time

17/12/2024 8:15 am

Provider \*

Jane Doe

▼

End Date / Time

17/12/2024 8:45 am

Color

✓

Timezone

Provider: UTC

Current User: UTC

Location

Notes

Status

Booked

▼

Cancel

✓ Save

### Customer Details

+ New

👉 Select

First Name \*

Address

Last Name \*

City

Email \*

Zip Code

Phone Number \*

Timezone

UTC

*Note:* You can either add new customer and enter their details or select from an existing customer for details to be auto filled.

### 3. Customers

The **Customers Tab** allows users to manage customer information and view associated appointments.

#### Customer Details

Fill in the following details to add or update a customer:

- First Name
- Last Name
- Email
- Phone Number
- Address
- City
- Zip Code
- Language
- Timezone
- Notes

#### Appointments Section

A separate box displays all appointments associated with the customer.

Q

Add

Customers

James Doe

james@example.org, +1 (000) 000-0000

Ryan Chams

radunogroup@gmail.com, 8014252704

Details

First Name

Last Name

Email

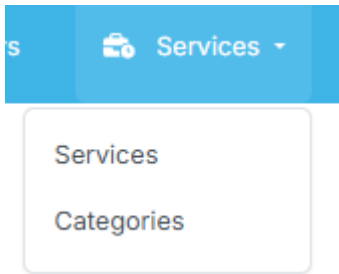
Phone Number

Address

Appointments

### 4. Services

The **Services Tab** includes two dropdowns:



## a) Services

Add or manage service details:

- Service Name
- Duration
- Price
- Currency
- Category
- Availability Types
- Attendants Number
- Location
- Color

- Visibility Options (Hide or Show from Public)

Services

Service
30 min - 0

Details

Name

Duration (Minutes)

Price

Currency

Category

Availabilities Type

b) Categories

Add or manage service categories:

- Category Name
- Description

Service Categories

No records found...

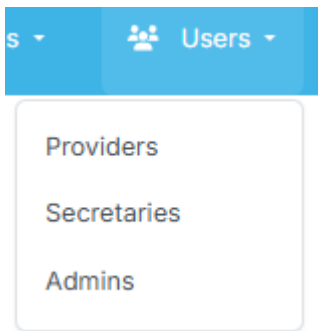
Details

Name \*

Description

## 5. Users

The **Users Tab** manages user roles and is divided into three roles:



### a) Providers

Add or manage provider details:

- Username
- First and Last Name
- Email
- Password and Retype Password
- Phone and Mobile Numbers
- Language
- Calendar
- Timezone
- Location

### b) Secretaries

Follow the same process as Providers.

### c). Admin

Follow the same process as Providers.

Add

Details

Working Plan

## Details

First Name

Username

Last Name

Password

Email

Retype Password

Phone Number

Calendar

Default



Mobile Number

Language

English

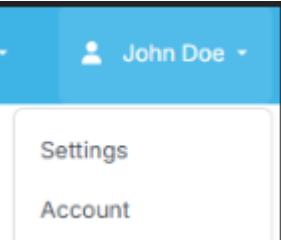


Address

Timezone

# 6. Settings

The **Settings Section** is divided into multiple areas and is found in the drop down below the user name:



## General Settings

- Company Name
- Email
- Website Link
- Logo
- Color Theme
- Localization



# Settings

General Settings

Booking Settings

Business Logic

Legal Contents

Integrations

## General Settings

☒ Save

### Company

#### Company Name \*

Quick Reserve Appointments

Company name will be displayed everywhere on the system (required).

#### Company Email \*

admin@example.com

This will be the company email address. It will be used as the sender and the reply address of the system emails (required).

#### Company Link \*

quickreserve.net

Company link should point to the official website of the company (required).

#### Company Logo

Choose FileNo file chosen

The company logo will be displayed in many places of the app, including the booking page and the

## Booking Settings

- Select which **fields** to display during booking an appointment.

# Settings

General Settings

Booking Settings

Business Logic

Legal Contents

Integrations

## Booking Settings

☒ Save

### Fields

#### First Name \*

☒ Display ☒ Require

#### Address

☒ Display ☐ Require

#### Last Name \*

☒ Display ☒ Require

#### City

☒ Display ☐ Require

#### Email \*

☒ Display ☒ Require

#### Zip Code

☒ Display ☐ Require

- Customize fields to be added.

## Custom Fields

### Custom Field #1

Label

☐ Display ☐ Require

### Custom Field #2

Label

☐ Display ☐ Require

### Custom Field #3

Label

☐ Display ☐ Require

### Custom Field #4

Label

☐ Display ☐ Require

### Custom Field #5

Label

☐ Display ☐ Require

## Business Logic

- **Working Plan:** Mark the days and hours that your company will accept appointments.

DAY	START	END
<input checked="" type="checkbox"/> Sunday	9:00 am	6:00 pm
<input checked="" type="checkbox"/> Monday	9:00 am	6:00 pm
<input checked="" type="checkbox"/> Tuesday	9:00 am	6:00 pm
<input checked="" type="checkbox"/> Wednesday	9:00 am	6:00 pm
<input checked="" type="checkbox"/> Thursday	9:00 am	6:00 pm
<input checked="" type="checkbox"/> Friday	9:00 am	6:00 pm
<input checked="" type="checkbox"/> Saturday	9:00 am	6:00 pm

☒ Apply To All Providers

- **Blocked Periods:** Define periods of time where public bookings will be disabled for all providers. Press Configure then fill in the details.

### Details

Name \*

Start \*

17/12/2024 12:00 am

End \*

18/12/2024 12:00 am

Notes

- **Time-Out Breaks :** Add the working breaks during each day.

+ Add Break

DAY	START	END	ACTIONS
Sunday	2:30 pm	3:00 pm	<div><div></div><div></div></div>
Monday	2:30 pm	3:00 pm	<div><div></div><div></div></div>
Tuesday	2:30 pm	3:00 pm	<div><div></div><div></div></div>
Wednesday	2:30 pm	3:00 pm	<div><div></div><div></div></div>
Thursday	2:30 pm	3:00 pm	<div><div></div><div></div></div>
Friday	2:30 pm	3:00 pm	<div><div></div><div></div></div>

- **Appointment Statuses:** Define a list of available appointment status options that can be used in the the calendar topic.

#### Appointment Status Options

Define a list of available appointment status options that can be used in the the calendar page (the first one will automatically become the default value).

Booked

Confirmed

Rescheduled

Cancelled

Draft

+ Add

## Legal Contents

- Can choose to display the Cookie Notice.

#### Cookie Notice

☐ Display Cookie Notice

#### Cookie Notice Content

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Cookie notice content.

- Can choose to display the Terms and Conditions.

#### Terms & Conditions

☐ Display Terms & Conditions

#### Terms & Conditions Content

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Terms and conditions content.

- Can choose to display the Privacy Policy.

#### Privacy Policy

☐ Display Privacy Policy

#### Privacy Policy Content

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Privacy policy content.

## Integrations

The application supports multiple integrations:

### 1. Webhooks:

- Send HTTP notifications to external applications for events like appointment creation or customer removal.

### 2. Google Analytics:

- Add tracking code to the public booking topic to monitor sessions.

### 3. Matomo Analytics:

- Similar to Google Analytics, track booking sessions.

### 4. API:

- Use HTTP protocol to interact with the application's data and create custom integrations.

## 5. LDAP Integration:

- Connect to an LDAP server for Single Sign-On (SSO) and automatic user imports.

# 8. Account

The Account tab allows users to edit their details The topic includes:

- Username
- First and last names
- Setting the password
- Language
- Phone/Mobile numbers
- Calendar style
- Address

Account Save

First Name *	Username *
<input type="text" value="John"/>	<input type="text" value="admin"/>
Last Name *	Password
<input type="text" value="Doe"/>	<input type="password"/>
Email *	Retype Password
<input type="text" value="admin@example.com"/>	<input type="password"/>
Phone Number *	Calendar *
<input type="text" value="18001234567"/>	<input type="text" value="Default"/>
Mobile Number	Language
<input type="text"/>	<input type="text" value="English"/>
Address	Timezone
<input type="text"/>	<input type="text" value="UTC"/>

This documentation covers all primary functionalities of the Appointment Scheduling Application, including user roles, managing appointments, customers, and services, as well as settings and integrations. For further support, contact us at [contact@resellportal.com](mailto:contact@resellportal.com)

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