Appointment Scheduling

The Appointment Scheduling Software is designed to help businesses manage and schedule appointments efficiently. It offers features like online booking, automated reminders, calendar integration, and client management to streamline the appointment process for businesses of any size. This documentation serves as a comprehensive guide for setting up, configuring, and using the appointment scheduling software effectively.

Key Features:

- Online Booking
- Automated Reminders
- Calendar Integration
- Client Management
- Service Management
- Time Slot Management
- Staff Management

- Using Appointment Scheduling

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*.

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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.**

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Managing Appointments

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

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4. Services

The **Services Tab** includes two dropdowns:

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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)
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b) Categories

Add or manage service categories:

- Category Name
- Description
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5. Users

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

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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.

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6. Settings

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

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General Settings

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

- Select which **fields** to display during booking an appointment.
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- Customize fields to be added.
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Business Logic

- **Working Plan:** Mark the days and hours that your company will accept appointments.
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- **Blocked Periods:** Define periods of time where public bookings will be disabled for all providers. Press Configure then fill in the details.
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- **Time-Out Breaks :** Add the working breaks during each day.
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- **Appointment Statuses:** Define a list of available appointment status options that can be used in the the calendar topic.

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Legal Contents

- Can choose to display the Cookie Notice.
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- Can choose to display the Terms and Conditions.
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- Can choose to display the Privacy Policy.
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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
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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.