

# 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.
- Can choose to display the Terms and Conditions.
- 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.

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