

Appointment Scheduling System User Manual

By Grace Web Design
www.graceschedules.com

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Introduction

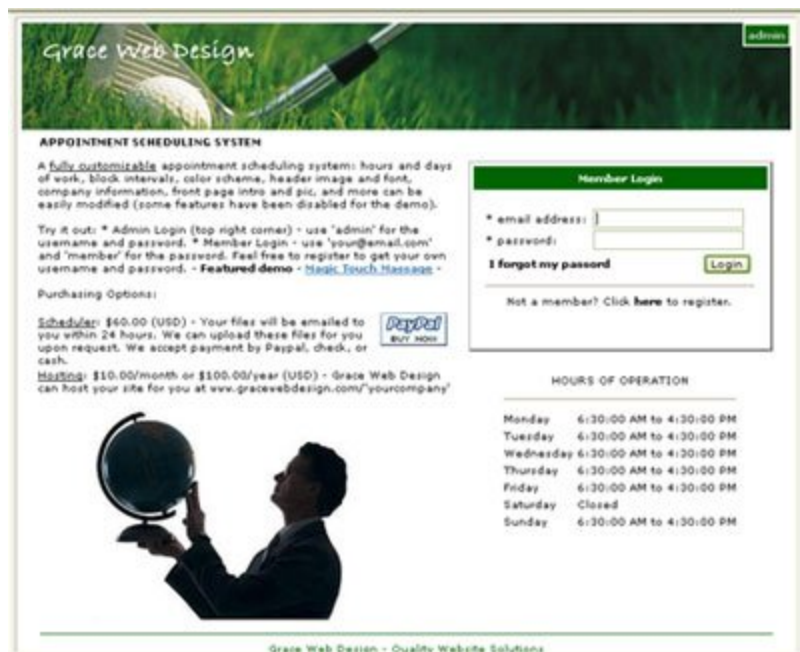
Appointment Scheduling System by Grace Web Design is simple, affordable, practical, yet extremely dynamic. It can be tailored to work well for any business type and any website theme. This document provides instruction on how to use the system and covers all of its functions and features.

Home Page

This is the first page your client will see when they visit your scheduler. We use the term “client” for the purpose of this manual. Client also refers to patient, customer, or student. The left portion of this page is fully customizable and will take any HTML code that you assign to it (text, pictures, links, etc.). You also have the option to display hours of operation and services offered below the login box. We will look at how to modify this page in the “Preferences” section of this document.

Client Login / Registration

On the right you will see a login box for your clients. If this is your client’s first visit they will be required to register. This provides them with a randomly generated password of which they can change at any time. This process is very quick and your client will receive their intro email immediately. Alternatively, the administrator can create and modify client’s login details at any time.



Password Retrieval

The client login box also allows users to retrieve their password in the event that they have forgotten it. After providing your email address, your password will be sent to you.

Administrator Login

In the top right hand corner of this page is an “admin” link. Click here to login to the administration section. Login details for the demo schedulers are

Administrator: admin

Password: admin

Client Section

Booking an Appointment

Once logged in your client will view a calendar displaying the current month. Users can click on any date or use the navigation tools provided to jump to a

The screenshot shows the 'APPOINTMENT SCHEDULER - ONLINE DEMO' interface. On the left is a calendar for September 2006 with the 28th highlighted. On the right is a booking form for 'Thursday, September 28, 2006'. The form includes a 'Select a Service' dropdown menu with 'Massage (60 min)' selected, an 'Available times' dropdown menu with '8:00 AM to 9:00 AM' selected, and an 'Appointment Notes (optional)' text area. There are 'Reset' and 'Submit' buttons at the bottom of the form. The top right corner of the interface says 'Welcome Demo User'.

different date. To the right is the selection box which contains the selected date, select resource box (Multiple Resource Version 5.1 only), select service box, available times for the selected day, and appointment notes. The options that are displayed are based on the preferences set by the administrator. We will cover this later in the preferences section.

After the submit button is clicked the user is redirected to the submitted page where the appointment is confirmed and confirmation emails are sent off to the client and the company address (This is an optional feature).

Viewing / Editing / Deleting Appointments

The screenshot shows the appointment confirmation and management interface. On the left, under the heading 'You currently have the following appointments booked:', there is a table with the following data:

Date	Time	Resource	Appointment Notes
Thursday, 9/28/2006	9:00 AM to 9:15 AM	Resource 2	Service 1 My appointment is now booked

On the right, under the heading 'Select Appointment:', there is a dropdown menu showing 'Thursday, 9/28/2006, 9:00:00 AM' and three buttons: 'EDIT', 'DELETE', and 'Go'.

All appointments for each client will be displayed at the bottom of the scheduler when logged in. Clients have the option to modify or delete appointments if they choose.

My Account for Clients and Administrators

The screenshot shows the 'UPDATE ACCOUNT INFORMATION' form. It contains a table with the following data:

ID	First Name	Last Name	Email Address	Main Phone	Alternate	Password	Update
100	Demo	User	demo@test.com			demo	X

There is a 'cancel' button at the bottom right of the form.

This feature is available for clients as well as administrators. Here we can simply modify our personal information including email address, phone numbers, and password.

Administration Section

This portion of the scheduler is accessible by the administrator and only those members whom the administrator has authorized access to. Like the client section, the first page the administrator sees after login is the calendar page. However, there's much more functionality on the admin side.

Calendar Views

By default the calendar is opened up for the current day. With the multiple resource version all resources are displayed for that day (below). This version also features daily and weekly views.

Thursday, September 28, 2006 - APPOINTMENTS FOR TODAY													
Time	Mark	Time	Masseuse Kelly	Time	Resource 1	Time	Resource 2	Time	Resource 3	Time	Resource 4	Time	Resource 5
10:00 AM		10:00 AM	K G	10:00 AM		10:00 AM		10:00 AM		10:00 AM		10:00 AM	
10:15 AM		10:15 AM		10:15 AM		10:15 AM		10:15 AM		10:15 AM		10:15 AM	

Calendar - Scheduling Appointments for Clients

Small circles in the date squares tell the viewer that there are appointments scheduled for these days. The selected day is highlighted (left). To select a day simply click the date or use the selection boxes below the calendar.

<< September 2006 >>						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
					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

Below is an example of a multiple resource scheduler form. The main difference with this version is that you're able to create several resources as well as services. Because we are creating appointments on the administrator side, the cache does not currently hold the clients information (the client is not logged in). Therefore we are

Mark - Thursday, September 28, 2006

Select a Resource: **Weekly View**

Select a Service:

Available Times: Reoccurs:

First Name: Last Name:

Phone 1: Phone 2:

Appointment Notes:

(optional)

required to enter these details for them. This method would usually be used for those appointments scheduled over the phone or directly by admin.

The scheduler automatically

consults the database to ensure that the times displayed here are not already booked. This is a full proof way to avoid double booking. Time intervals are displayed based on the length of service selected. Version 5.1 also has a reoccurring feature which allows users to schedule appointments daily, weekly, biweekly, monthly, or annually.

Daily schedules offer block options. With a click of the dot located on the left of the time frame, the line will be highlighted grey and will no longer be a vacant time block. You may also click "book entire day" at the bottom of the schedule to block a day (only for days with no appointments booked). At the right of each appointment is a quick link to each clients email address.

Wednesday, September 27, 2006 - APPOINTMENTS FOR TODAY - print schedule -					
B	Time	Name	Appointment Notes	Phone	Email
•	8:00 AM to 8:15 AM				
•	8:15 AM to 8:30 AM				
	8:30 AM to 8:45 AM	Demo User	Service 1	+44123456789	go
	8:45 AM to 9:00 AM				
	9:00 AM to 9:15 AM				
	9:15 AM to 9:30 AM				
	9:30 AM to 9:45 AM	BLOCKED			
•	9:45 AM to 10:00 AM				

Printer friendly copies of the daily schedules are generated when clicking "print schedule" located in the header of the schedule.

Appointments Table

The appointments section provides an easy way to view your appointments with the criteria that you set. By default all future appointments are displayed.

APPOINTMENT SCHEDULER - ONLINE DEMO		CALENDAR - APPOINTMENTS - MEMBERS						
Search Filter:	<input type="text"/>	or	Current Month	Go	Display all future appointments	Show All		
APPOINTMENTS IN DATABASE								
Date	Time	Resource	Service	Customer	Phone	Appointment Notes	Delete	Edit
9/27/2006	9:30 AM to 9:45 AM		BLOCKED				X	
9/28/2006	12:00 PM to 12:30 PM	Resource 5	_Your Services	Demo User		s\dzxcv	X	E
9/28/2006	10:00 AM to 11:45 AM	Resource 5	Extension	Demo User		test	X	E
9/28/2006	10:00 AM to 12:30 PM (Daily)	Resource 3	Massage	Joe Blow			X	E
9/29/2006	1:45 PM to 4:15 PM	Masseuse Kelly	Massage	Demo User		dsfdsfsdfsdfs	X	E
9/29/2006	10:15 AM to 12:00 PM	Masseuse Kelly	Extension	Demo User			X	E
10/10/2006	10:15 AM to 10:45 AM	Masseuse Kelly	Cut and Streak	Jodie talbert			X	E
10/26/2006	10:00 AM to 10:30 AM	Resource 1	_Your Services	mo mo		bvcbcb	X	E
5/26/2008	10:00 AM to 10:30 AM	Resource 1	Cut and Streak	Demo User		gbhg bhg	X	E
2/23/2010	11:15 AM to 11:30 AM	Appraiser 4	Haircut	k g		test	X	E

Search and Sort Features

A search filter allows you to search for any string of characters in any field of the database. A drop down box is also handy if you want to search by month. By selecting "Show All" you will be provided with every appointment in the database. In addition, you can sort the appointments by clicking the column headers.

You may also delete or edit any of the appointments by clicking the appropriate link at the right of the appointment.

Members Table

The members section contains all of your clients' information. The same search and sort features apply to this table as well. An email link is provided with each client's line for easy communication. Administrators have the ability to add members to the database by clicking the "Add Member" link. Done this way, your client does not need to register. The creator of the account would provide their login details.

Mass Email

By clicking "Email Members" a pop up window appears (right). This is a great tool that allows you to email all of your clients in one shot. This is really handy for promotions, updates, events, or any other communication.

Preferences

The preferences section is where the scheduler's customization takes place. Here we can modify the look, feel, and function of the site with ease.



The screenshot below shows all the different customization options available for your schedule. These include:

- Color Scheme – Ability to change the color of every visual aspect of the scheduler. Easy to use color picker is provided for your convenience but you may enter any word (i.e. white) or hexadecimal color code (i.e. FFFFFFFF).

- Fonts & Borders – Modify the style and size of the site’s text and choose from a selection of main border styles.
- Header – Configure the header image, font, and size. The scheduler comes with a number of options for header images but you have the option to enter any URL you choose.

APPOINTMENT SCHEDULER - ONLINE DEMO		CALENDAR - APPOINTMENTS - MEMBERS	
COLOR SCHEME Outer Background: <input type="text" value="660000"/> <input type="checkbox"/> Inner Background: <input type="text" value="FFFFFF"/> <input type="checkbox"/> Header Background: <input type="text" value="ededed"/> <input type="checkbox"/> Header Font: <input type="text" value="660000"/> <input type="checkbox"/> Form Background: <input type="text" value="D9CBAE"/> <input type="checkbox"/> Top Menu Font: <input type="text" value="FFFFFF"/> <input type="checkbox"/> Link: <input type="text" value="630003"/> <input type="checkbox"/> Link Mouseover: <input type="text" value="893E42"/> <input type="checkbox"/> Title: <input type="text" value="630003"/> <input type="checkbox"/> Footer: <input type="text" value="893E42"/> <input type="checkbox"/> Main Border: <input type="text" value="FFFFFF"/> <input type="checkbox"/> Table Border: <input type="text" value="FFFFFF"/> <input type="checkbox"/> Subtitle: <input type="text" value="000000"/> <input type="checkbox"/> Body Text: <input type="text" value="000000"/> <input type="checkbox"/>		SERVICES OFFERED Add Service: <input type="text"/> Interval: <input type="text" value="15 minutes"/> <input type="checkbox"/> Color: (optional) <input type="text"/> <input type="checkbox"/> select Cost: (optional) <input type="text"/> <input type="button" value="Save"/> <div style="border: 1px solid black; padding: 2px;"> Your Services (30 min) \$1 Baking (15 min) \$10 Cut and Streak (30 min) \$45.99 Extension (105 min) \$299 Haircut (15 min) \$12 </div> <input type="button" value="Edit"/> <input type="button" value="Delete"/>	
FONTS & BORDERS Body Font: <input type="text" value="Verdana"/> <input type="checkbox"/> Body Font Size: <input type="text" value="10"/> <input type="checkbox"/> Main Border: <input type="text" value="double"/> <input type="checkbox"/> <input type="text" value="0"/> <input type="checkbox"/>		HOURS OF WORK Start: <input type="text" value="10"/> <input type="checkbox"/> : <input type="text" value="00"/> <input type="checkbox"/> <input type="text" value="AM"/> <input type="checkbox"/> Finish: <input type="text" value="5"/> <input type="checkbox"/> : <input type="text" value="30"/> <input type="checkbox"/> <input type="text" value="PM"/> <input type="checkbox"/> DAYS OF WORK <input checked="" type="checkbox"/> Monday <input checked="" type="checkbox"/> Friday <input checked="" type="checkbox"/> Tuesday <input type="checkbox"/> Saturday <input checked="" type="checkbox"/> Wednesday <input type="checkbox"/> Sunday <input checked="" type="checkbox"/> Thursday <input checked="" type="checkbox"/> Display Hours of Work on front page <input checked="" type="checkbox"/> Display Services on front page	
HEADER Font: <input type="text" value="Bradley Hand"/> <input type="checkbox"/> Size: <input type="text" value="5"/> <input type="checkbox"/> Pic: <input type="text" value="Massage Therapy (Ivory)"/> <input type="checkbox"/> <input type="text" value="http://www.gracevebdesign.com/sched"/>		DAYS NOTICE Required Notice for Online Appointment: <input type="text" value="1"/> days TIME OUT Web page can remain inactive for this long before session is terminated: <input type="text" value="120"/> minutes <input type="button" value="Save"/>	
<input type="button" value="Defaults"/> <input type="button" value="Save"/>		RESOURCES Add Resource: <input type="text"/> Color: (optional) <input type="text"/> <input type="checkbox"/> <input type="button" value="Save"/> <div style="border: 1px solid black; padding: 2px;"> Mark Masseuse Kelly Resource 1 Resource 2 </div> <input type="button" value="Edit"/> <input type="button" value="Delete"/>	
		COMPANY INFORMATION Company Name: <input type="text" value="Your Company Name and"/> Business Type: <input type="text" value="Quality Website Solutions"/> Address: <input type="text" value="2356 Wakefield Drive"/> City: <input type="text" value="Langley"/> Province or State: <input type="text" value="BC"/> Postal or Zip: <input type="text" value="V2Y1B4"/> Phone: <input type="text" value="604-312-6125"/> Fax: <input type="text"/> Email: <input type="text" value="gracevebdesign@shaw.ca"/>	
		SUBTITLE <input type="text" value="APPOINTMENT SCHEDULER - ONLINE D"/>	
		WEBSITE INTRO Main Page Content: <input type="button" value="edit"/> Registration Page Content: <input type="button" value="edit"/>	
		AUTOMATIC EMAILS Email Sent After Registration: <input type="button" value="edit"/> Email Sent After Appointment is Scheduled: <input type="button" value="edit"/> <input checked="" type="checkbox"/> Activate Automatic Send	
		ADVERTISING <input checked="" type="checkbox"/> Display Google Ads <input type="button" value="Save"/>	

- Services Offered – Add as many services and relative time intervals to your scheduler as you like. Assigning color codes and costs are optional. Edit and delete details at any time.
- Hours of Work – Select your start and end time. Change at any time.
- Days of Work – Select the days of the week your business operates.
- Select whether you would like to display the hours of work and services offered on the main page.
- Days Notice – Here you can assign a number of days notice you would require for a client to schedule an appointment online.
- Time Out – Session variables keep your login active. This number will tell the system how long you will allow users to remain idle before the scheduler automatically logs them out.
- Resources – Add resources to you scheduler (version 5.1 only). This option allows one scheduler to manage several resources.
- Company Information – Enter you company name, business type, address, phone number, and email address. The company name will be automatically displayed in the header unless you state otherwise. All company information is provided for the viewers in the footer of the scheduler.
- Subtitle – This is the text displayed directly below the header.
- Main Page Content – As stated before, the main page can be any content you wish. Here a pop up window will appear where you will enter your HTML code. A link to w3schools is provided at the bottom of the page if you need help with HTML code.
- Registration Page Content – When a new client registers, this will be the content provided on the pop up registration form.
- Automatic Emails – Configure details of the emails sent to clients after they register and after they schedule an appointment. Sending automatic emails after scheduling appointments is optional and can be turned off by deselecting the “Activate Automatic Send” checkbox.
- Advertising – Select this box if you want to display Google ads at the bottom of your site.

Closing

I hope you'll find appointment scheduling by Grace Schedules has all the features you look for in a scheduler. Our goal is to provide you with a very dynamic, reliable, and user friendly scheduler that will assist and benefit your business. Thank you and enjoy your appointment scheduling system.