

EASYAPPOINTMENTS TAKE APPOINTMENTS ANY TIME ON YOUR APP!



EASY APPOINTMENTS

V1.0.0

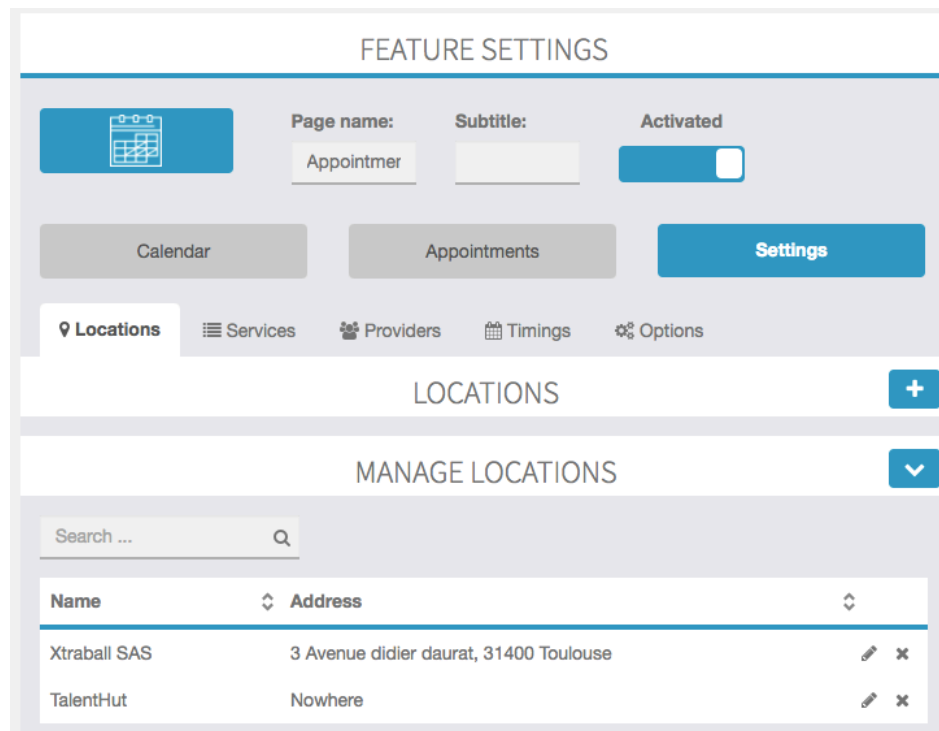
1. WELCOME

The **Easy Appointments** module will easily allow you add an appointments booking engine to your App. The App manager will be able to create multiple stores, categories, services and providers. It's also possible to define store opening and closing times and create a specific schedule for the providers. Lastly, so that the App Manager can also take appointments over the phone and from walk-ins, through the web front-end interface, it's also possible to add appointments manually. The **Easy Appointments** booking engine also send push reminders before each appointment. The default reminder is set for 1hr before the appointment but the user is free to adjust according to the individual needs. This module requires the Individual Push Notification Module in order for the send the alert reminders.

2. SETUP

The setup of the **Easy Appointments** Module is comprised of 5 steps. You'll need to access the Settings tab (figure 2.1) in order to begin this process.

Figure 2.1 – Settings

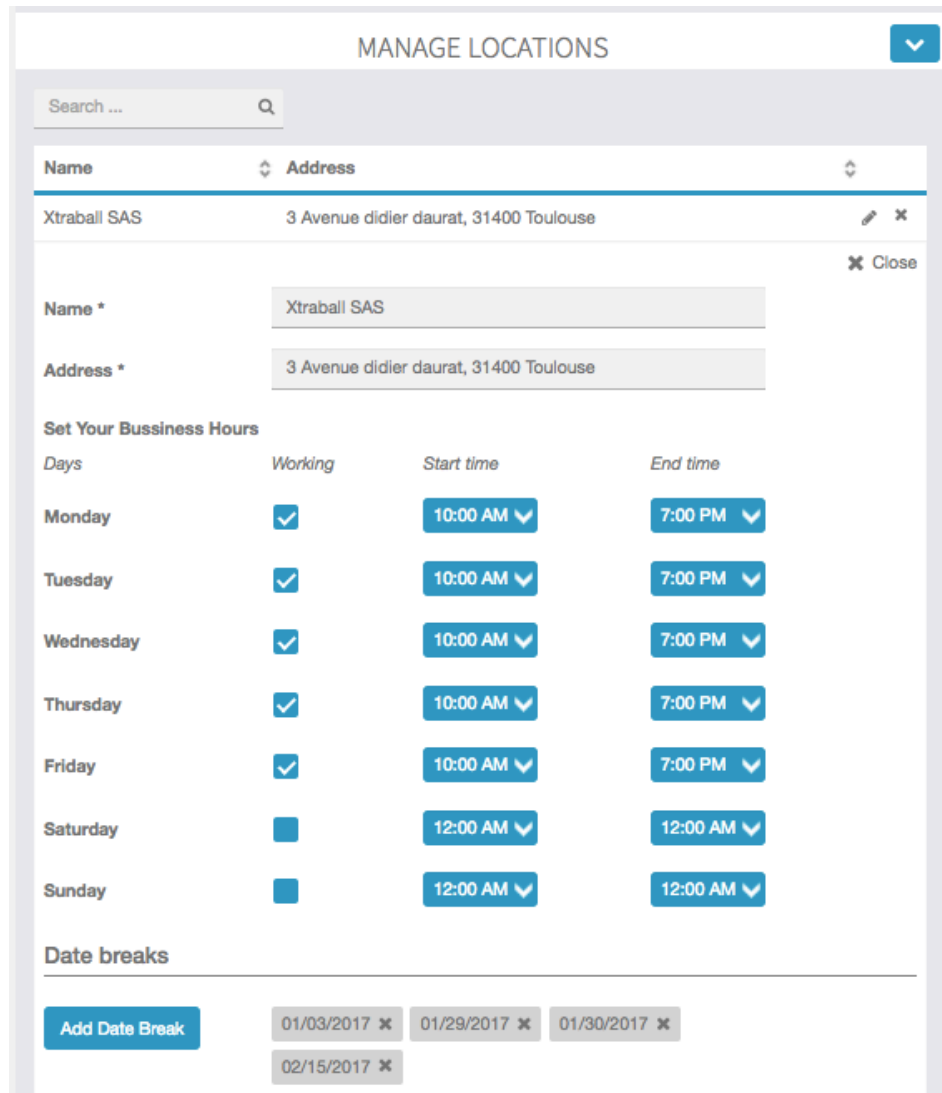


A. LOCATION

The first step is to create the location for your retail outlet (figure 2.A.1) You can have more than one outlet on each App. If you only have 1 store location, the user will not be presented with the store selection during the booking process. You'll need to add the Name of the location, the address, and set the business working hours. If you close for lunch, you won't define it here. When you add the providers, you'll be able to define the lunch period separately for each one of

them. Lastly, you'll be able to define if the store is closed on a specific day, like December 25, and save.

Figure 2.A.1 - Locations



The screenshot shows the 'MANAGE LOCATIONS' interface. At the top, there is a search bar and a dropdown menu. Below this is a table with columns for 'Name' and 'Address'. The first row shows 'Xtraball SAS' at '3 Avenue didier daurat, 31400 Toulouse'. To the right of this row are edit and delete icons. Below the table is a form for editing the location. The form has fields for 'Name *' (containing 'Xtraball SAS') and 'Address *' (containing '3 Avenue didier daurat, 31400 Toulouse'). Below these fields is a section titled 'Set Your Bussiness Hours' with a table of days, working status, start time, and end time. The days are Monday through Sunday. Monday through Friday are marked as working with a checkmark and have a start time of 10:00 AM and an end time of 7:00 PM. Saturday and Sunday are not marked as working and have a start time of 12:00 AM and an end time of 12:00 AM. Below this table is a section titled 'Date breaks' with an 'Add Date Break' button and four date break entries: 01/03/2017, 01/29/2017, 01/30/2017, and 02/15/2017, each with a delete icon.

Days	Working	Start time	End time
Monday	<input checked="" type="checkbox"/>	10:00 AM	7:00 PM
Tuesday	<input checked="" type="checkbox"/>	10:00 AM	7:00 PM
Wednesday	<input checked="" type="checkbox"/>	10:00 AM	7:00 PM
Thursday	<input checked="" type="checkbox"/>	10:00 AM	7:00 PM
Friday	<input checked="" type="checkbox"/>	10:00 AM	7:00 PM
Saturday	<input type="checkbox"/>	12:00 AM	12:00 AM
Sunday	<input type="checkbox"/>	12:00 AM	12:00 AM

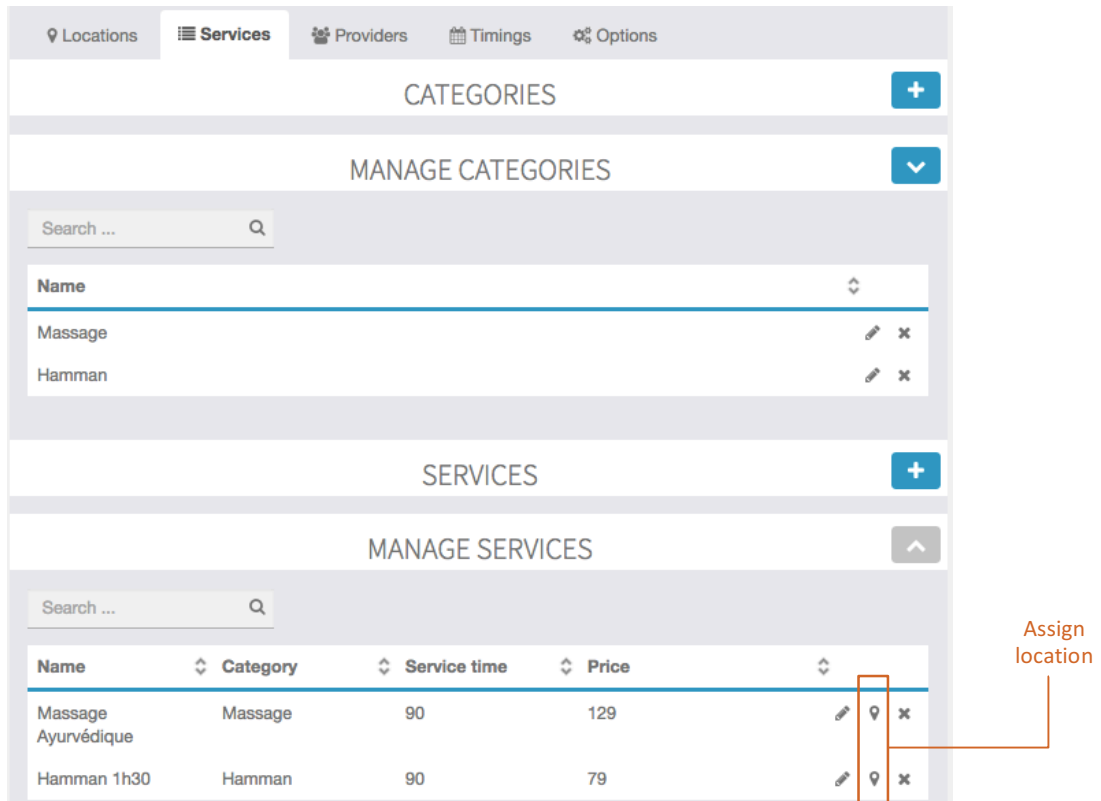
Date breaks

[Add Date Break](#) 01/03/2017 ✕ 01/29/2017 ✕ 01/30/2017 ✕
02/15/2017 ✕

B. SERVICE & CATEGORIES

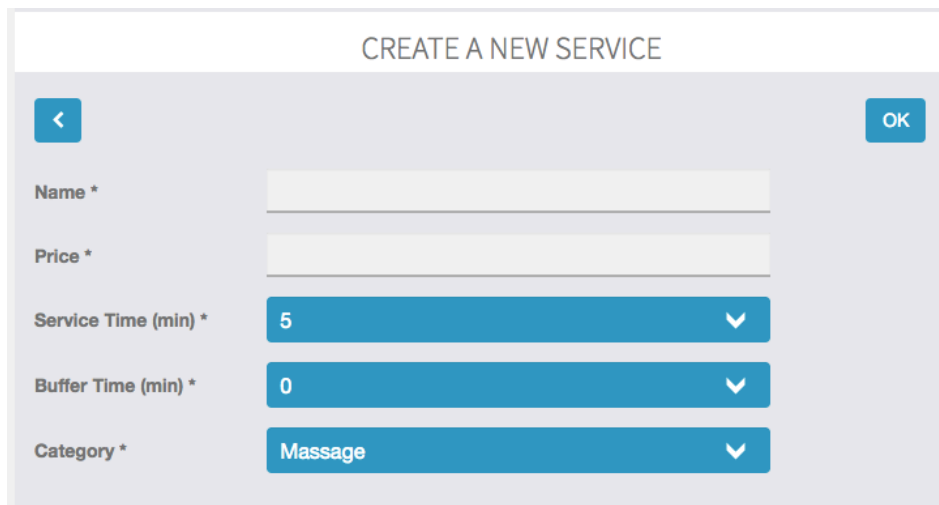
The second step is to create categories of services (figure 2.B.1). This will allow you to categorize the services and to show the user a more organized list of the services that are provided. If you only have 1 category, the category tab will not be shown during the booking process. The user will be taken to the services tab immediately.

Figure 2.B.1 – Services



Once you have created the categories, you can move on to creating the services (figure 2.B.2). You'll need to define a name, price – don't worry about the currency symbol, it will be obtained from your App's currency settings -, service and buffer times, and the category. The buffer time is the time that is required between appointments, it can be set to zero.

Figure 2.B.1 – Adding a service



CREATE A NEW SERVICE

< OK

Name *

Price *

Service Time (min) * 5

Buffer Time (min) * 0

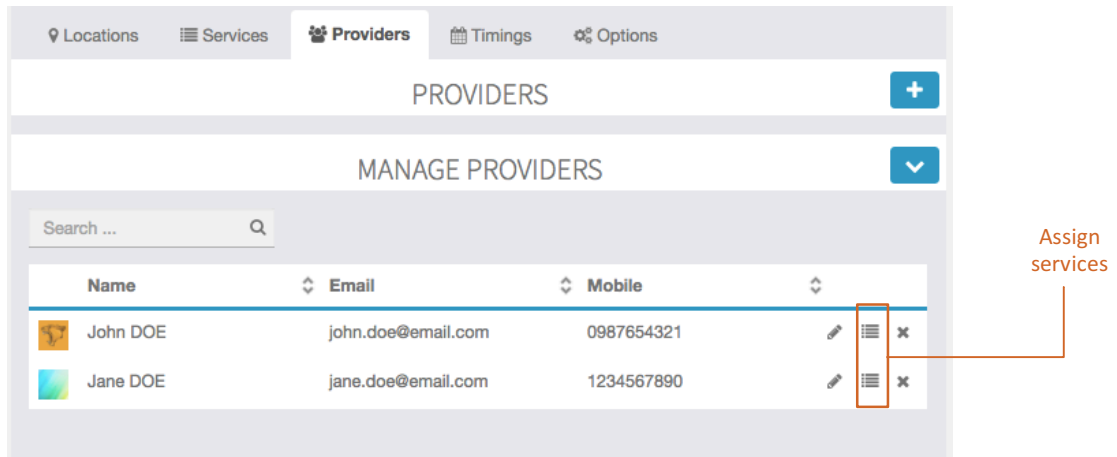
Category * Massage

Once you've saved the service, you'll need to define where that service is available. It could be there are multiple stores and the service is only available at one location (figure 2.B.1). You'll need to repeat this step for all the services that you create.

C. PROVIDERS

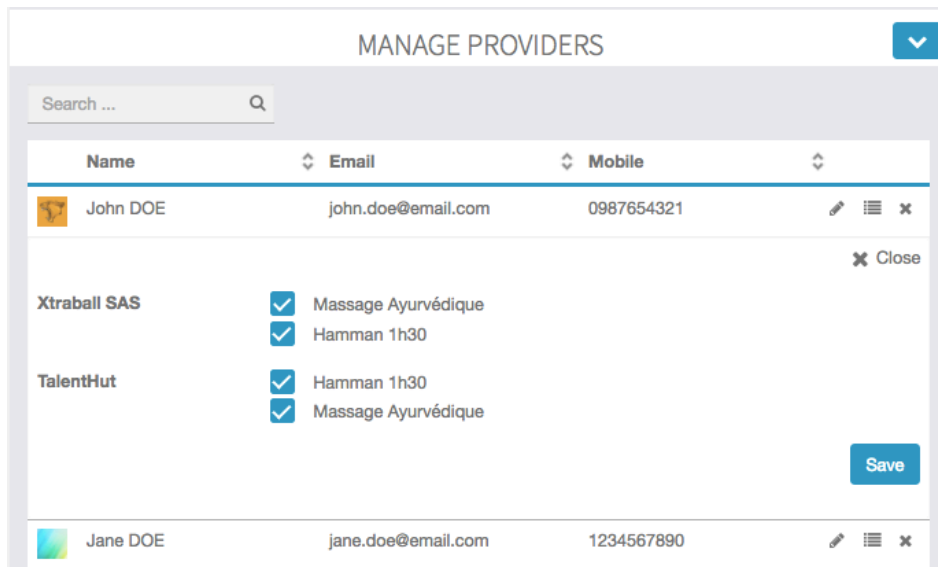
The first step is to add the providers and to associate the providers to the locations and services (figure 2.C.1) You'll need to create a name for the provider, add a phone number and an email address. Each time an appointment is made for a specific provider, an information email will be sent. You'll also be able to add a picture for each provider, if it's not added, a default avatar will be shown.

Figure 2.C.1 – Providers



Once you've add the provider, you'll need to assign the services to that provider (figure 2.C.1 and 2.C.2). Please note that if you have more than one location and the provider works at both locations, you'll need to assign the services to the provider at each location.

Figure 2.C.2 – Assign services to a provider



D. TIMINGS

The last step is to define when the provider will be available to work (figure 2.D.1). In case the provider works are more than one location, you'll need to define the timings for each location.

Figure 2.D.1 – Timings

TIMINGS		
Provider	Location	
Jane DOE	TalentHut - Nowhere	
John DOE	TalentHut - Nowhere	
Jane DOE	Xtraball SAS - 3 Avenue didier daurat, 31400 Toulouse	
John DOE	Xtraball SAS - 3 Avenue didier daurat, 31400 Toulouse	

When defining when the provider is available to work, you'll need to define the start and end times (figure 2.D.2). You can also add a day break, for example, in case the provider doesn't work on specific date due to a holiday or doctor's appointment. The lunch or any other breaks can also be added from this screen. These breaks will be excluded from the availability on the user's booking interface.

Figure 2.D.2 – Adding timings and breaks

Provider	Location	
Jane DOE	TalentHut - Nowhere	
John DOE	TalentHut - Nowhere	
Jane DOE	Xtraball SAS - 3 Avenue didier daurat, 31400 Toulouse	

Set Your Business Hours

Days	Working	Start time	End time
Monday	<input checked="" type="checkbox"/>	12:00 AM	11:30 PM
Tuesday	<input checked="" type="checkbox"/>	12:00 AM	11:30 PM
Wednesday	<input checked="" type="checkbox"/>	12:00 AM	11:30 PM
Thursday	<input checked="" type="checkbox"/>	12:00 AM	11:30 PM
Friday	<input checked="" type="checkbox"/>	12:00 AM	11:30 PM
Saturday	<input type="checkbox"/>	12:00 AM	12:00 AM
Sunday	<input type="checkbox"/>	12:00 AM	12:00 AM

Date breaks

[Add Date Break](#) 01/02/2017 ✕ 01/03/2017 ✕ 01/11/2017 ✕ 01/04/2017 ✕

Day breaks

[Select day](#) [Start time](#) to [End time](#) [Add](#)

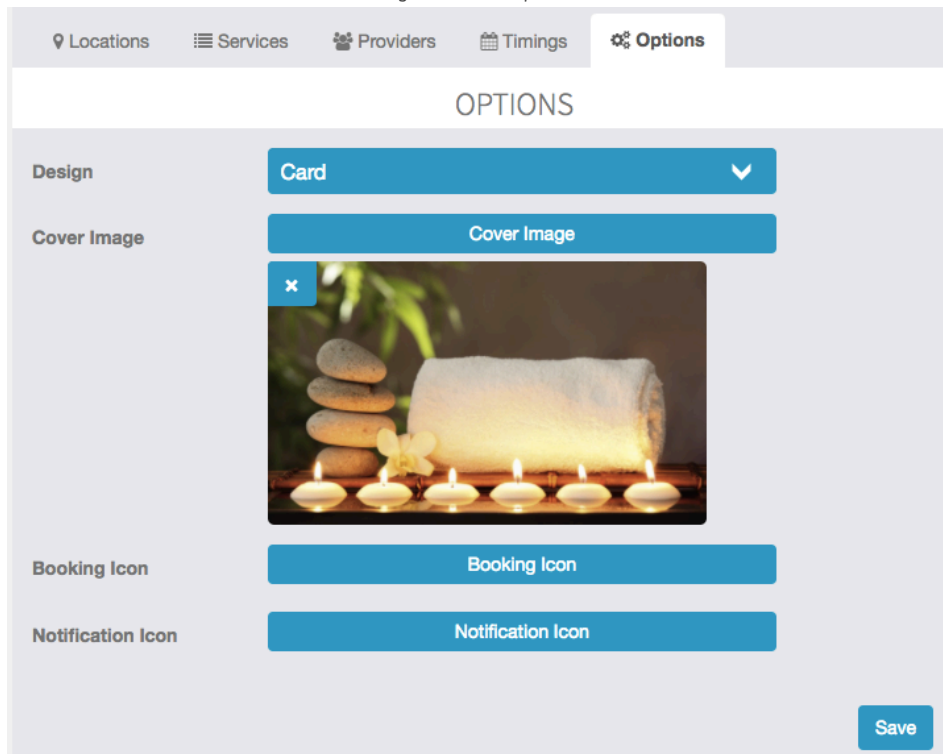
Monday, to 00:30 AM ✕ Tuesday, 00:30 AM to 01:00 AM ✕
Wednesday, 01:00 AM to 00:30 AM ✕

[Save](#)

E. OPTIONS

From the options menu you'll be able to adjust some module design options and customize the icons used (figure 2.E.1).

Figure 2.E.1 – Options

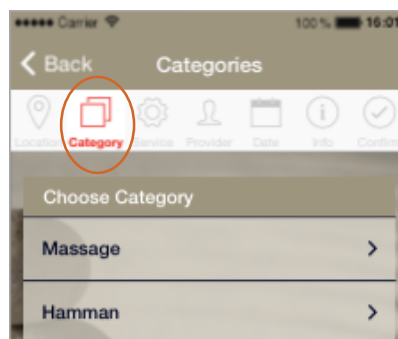


F. CUSTOMIZATION

The color of the active icon during the booking process can be customized individually by using the SCSS code below (figure 2.F.1):

```
.tab-item-active > .icon,  
.tab-item-active > span.tab-title {  
  color: #ff0000 !important;  
}
```

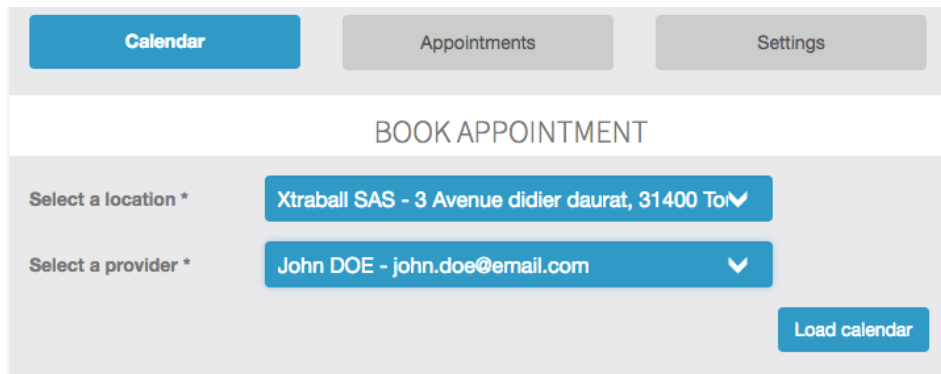
Figure 2.F.1 – Active icon



3. MANAGING APPOINTMENTS

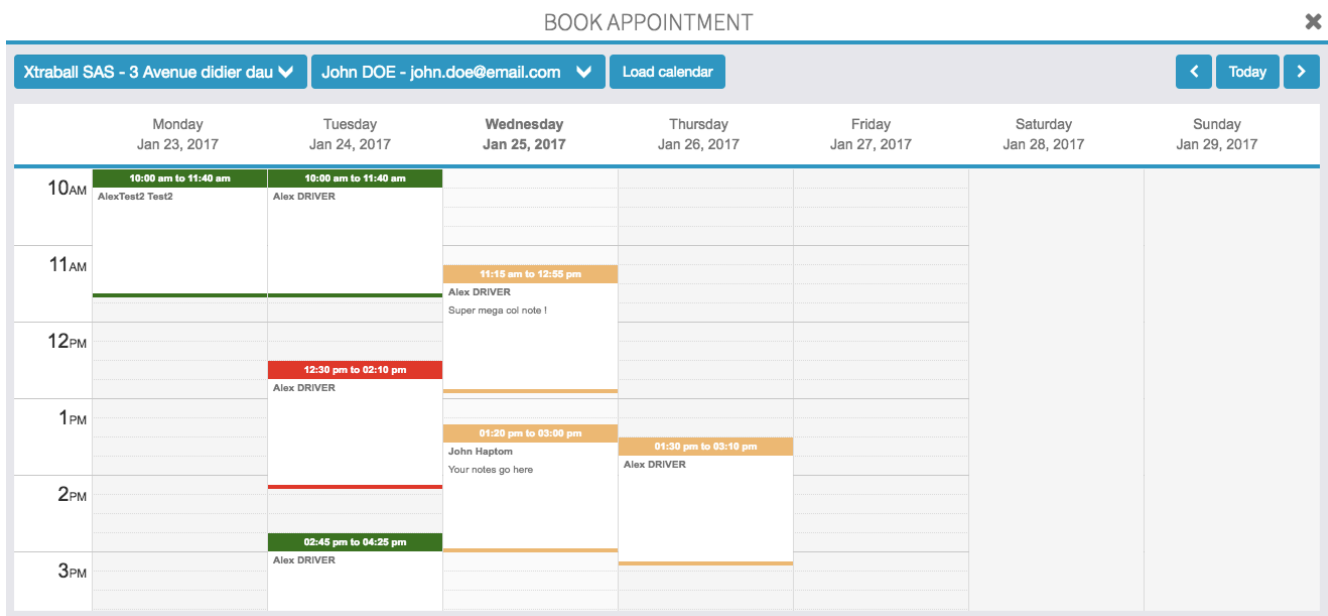
Appointments can be managed from the Calendar interface (figures 3.1 and 3.2). The store manager will need to select the location and provider that needs to be managed. Once that is selected, the calendar can be loaded with that criteria. Should the store manager need to change location or provider, it can be done using the pull-down menus.

Figure 3.1 – Loading the calendar



The screenshot shows a web interface with three tabs: 'Calendar' (active), 'Appointments', and 'Settings'. Below the tabs is a form titled 'BOOK APPOINTMENT'. It contains two dropdown menus: 'Select a location *' with the value 'Xtraball SAS - 3 Avenue didier daurat, 31400 To' and 'Select a provider *' with the value 'John DOE - john.doe@email.com'. A 'Load calendar' button is located at the bottom right of the form.

Figure 3.2 – Calendar View



The screenshot shows a weekly calendar grid for the week of January 23, 2017, to January 29, 2017. The grid is titled 'BOOK APPOINTMENT' and includes a close button (X) in the top right corner. The header shows the selected location 'Xtraball SAS - 3 Avenue didier dau' and provider 'John DOE - john.doe@email.com', along with a 'Load calendar' button and navigation arrows. The grid displays appointments for each day and time slot. Appointments include 'AlexTest2 Test2' on Monday, 'Alex DRIVER' on Tuesday, 'Alex DRIVER' on Wednesday, 'John Haptom' on Thursday, and 'Alex DRIVER' on Friday. A note 'Super mega cool note 1' is attached to the Wednesday appointment.

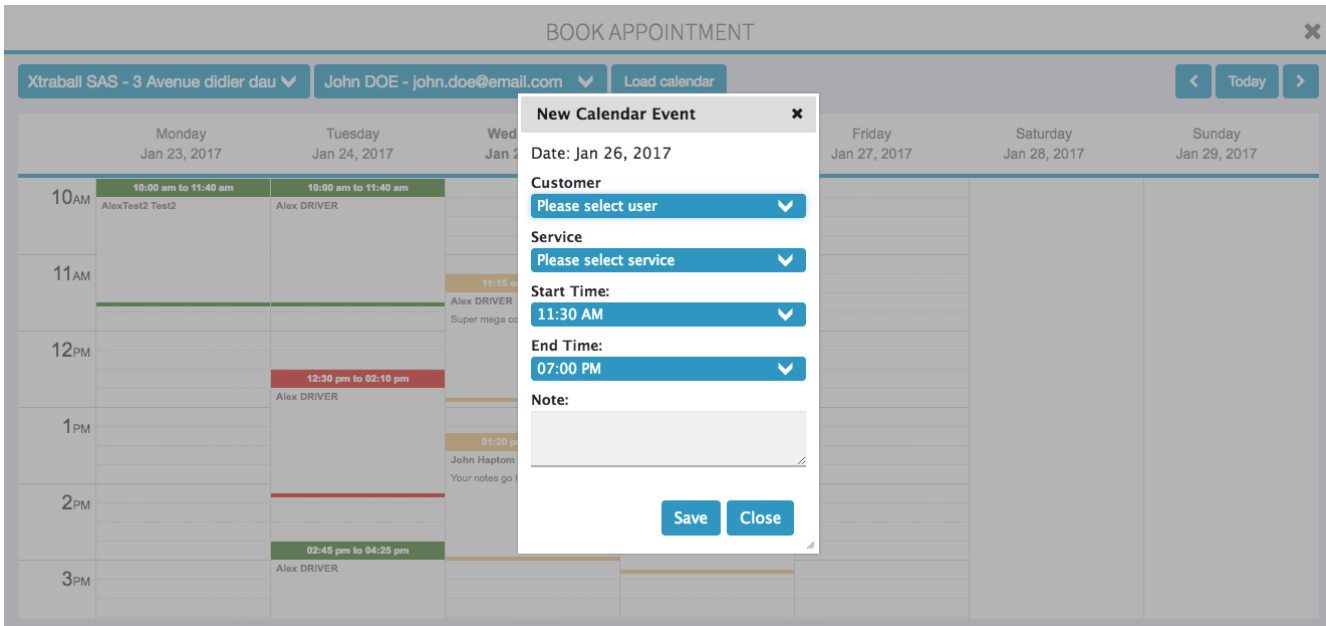
	Monday Jan 23, 2017	Tuesday Jan 24, 2017	Wednesday Jan 25, 2017	Thursday Jan 26, 2017	Friday Jan 27, 2017	Saturday Jan 28, 2017	Sunday Jan 29, 2017
10AM	10:00 am to 11:40 am AlexTest2 Test2	10:00 am to 11:40 am Alex DRIVER					
11AM			11:15 am to 12:55 pm Alex DRIVER Super mega cool note 1				
12PM		12:30 pm to 02:10 pm Alex DRIVER					
1PM			01:20 pm to 03:00 pm John Haptom Your notes go here	01:30 pm to 03:10 pm Alex DRIVER			
2PM							
3PM		02:45 pm to 04:25 pm Alex DRIVER					

A. ADDING AN APPOINTMENT

The store manager can add an appointment that is received over the phone or from a walk-in customer from the Calendar View (figure 3.2). An appointment can be easily added by clicking on the desired date and time. A new window will appear where the store manager will be able to select the service, the customer and the desired time (figure 3.A.1). If there any special appointment

requirements or details, these can be added to the Notes field. Once the new appointment is saved, a confirmation email will be sent to the customer and to the provider.

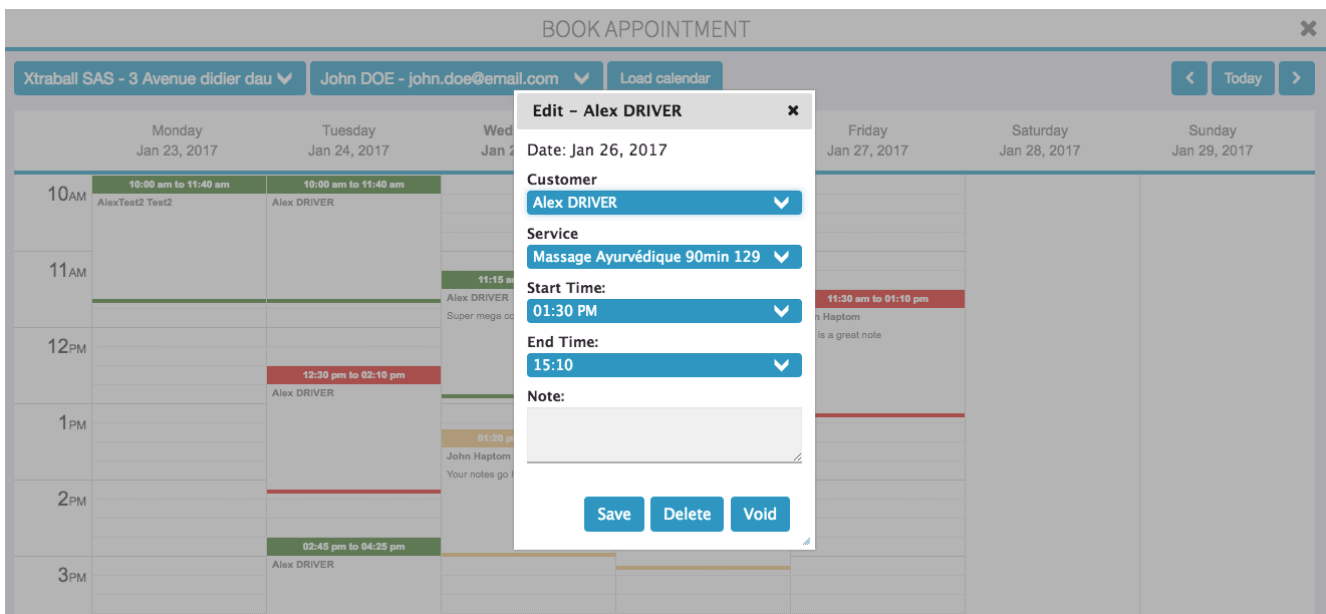
Figure 3.A.1 – Adding an appointment



B. CANCELLING AN APPOINTMENT

The customer cannot currently cancel an appointment. This will be enabled in a future release when booking cancellation policy is supported. Currently, if the customer needs to cancel an appointment, the store owner will have to be contacted. Cancelling an appointment can be done by clicking on an appointment from the Calendar View and pressing the Void button (figure 3.B.1). Voiding an appointment will maintain the appointment on the Calendar and on the customer’s front end. If you need to completely delete an appointment, the Delete button should be used instead.

Figure 3.B.1 – Voiding an appointment



C. EDITING AN APPOINTMENT

An appointment can be changed in two ways. If only a change in date/time is required within the same week, the store owner can just drag the desired appointment and drop it on the new date/time. Please make sure that the destination date/time is available, i.e., store is open and the provider is available on that day/time. If any of the criteria before fail, the drag/drop functionality will not work. The second way to change an appointment is to click on it as if you are going to edit it (figure 3.B.1). Once the appointment edit pop-up opens, you'll be able to change the appointment details.

4. USER FRONTEND INTERFACE

Below you can find the user frontend interface screens.

Figure 4.1 - booking process

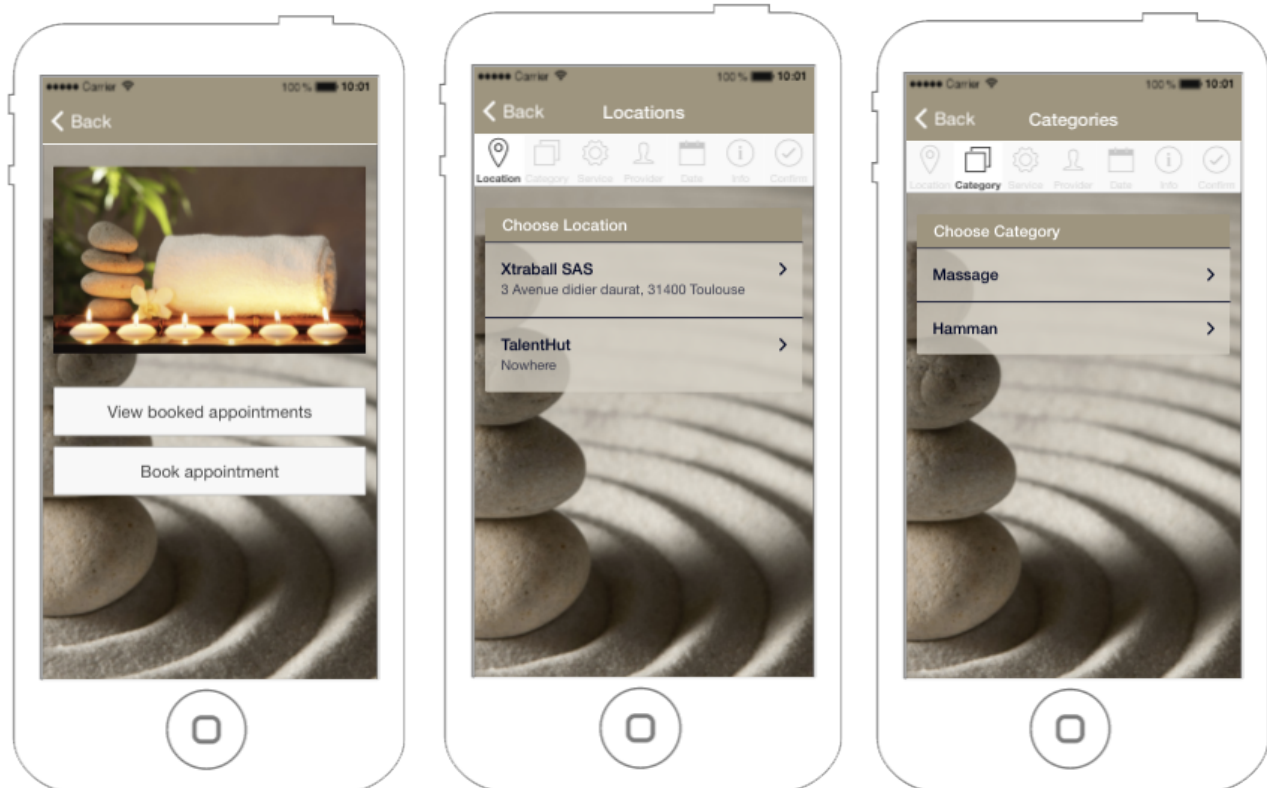


Figure 4.1 – booking process (continued)

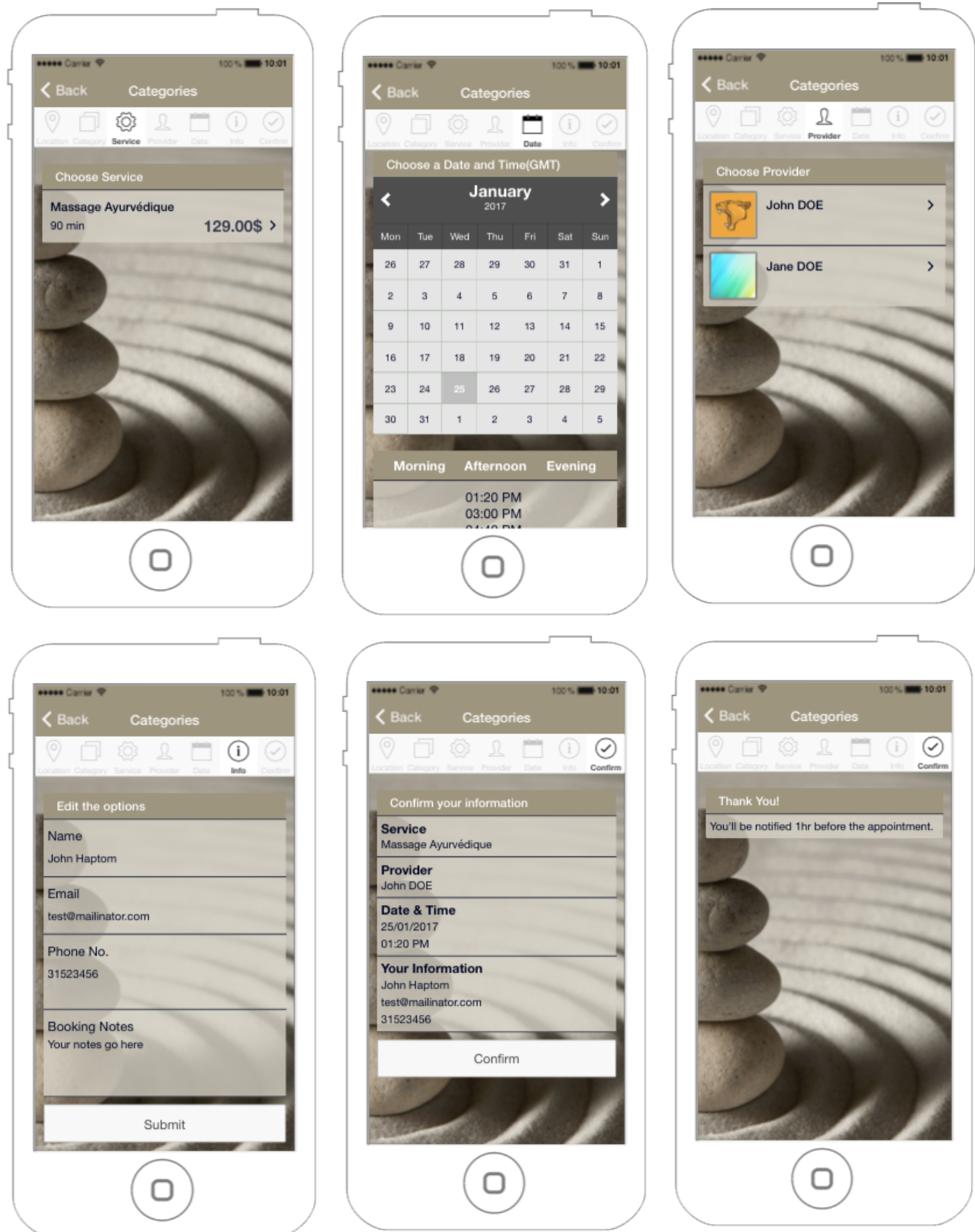


Figure 4.2 – booking confirmation & notifications

