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**AppointmentQuest**  
**Online Appointment Scheduler**

# **Users Guide**

**Volume I**  
**Account Setup Guide**

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## Introduction

Welcome to AppointmentQuest Online Appointment Scheduler!

Online Appointment Scheduler is a web-based application that helps you organize your business schedules and your staff's availability. Based on your custom appointment scheduling configuration you get a set of online scheduling pages (Customer Appointment Scheduler), where your customers can go to make appointments at any time, day or night.

With AppointmentQuest Online Appointment Scheduler, you can:

- Take appointment requests 24 hours a day, 7 days a week
- Maintain your own customer information database
- Improve schedule utilization and avoid overbooking
- Confirm and deny appointments with a click of a button
- Minimize no-shows with appointment reminders sent by e-mail

Improve your customer service by eliminating phone tag, reducing number of calls to your receptionists and coordinating your schedules and staff more efficiently. Your customers will find your online appointment scheduling convenient and easy to use. They will be able to make, reschedule or cancel their own appointments at any time online. You won't need to worry about missing telephone calls or losing appointment requests after hours.

Account Setup Guide steps you through Online Appointment Scheduler configuration, gives you plenty of examples showing how to optimize Online Appointment Scheduler for your specific scheduling needs and points you in the right direction if you need help in setting up your account.

## Overview

When you signed up for Online Appointment Scheduler, you provided basic information about your business, such as your business name, contact phone number and address. With this information, Online Appointment Scheduler created your online scheduling account.

Now you need to set up your business hours, schedules, personnel and service locations. After you match the services you offer with your personnel and schedules, Online Appointment Scheduler will enable the following features:

- **Appointment Wizard.** Based on your business hours as well as on schedule, personnel and service location availability, Online Appointment Scheduler configures your “Make Appointment” Wizard to allow you and your staff to browse your customer database, create new customer records and schedule appointments in just a few clicks.
- **Appointment Workarea.** The Appointment Workarea is where you can manage your appointments. Depending on your choice, it gives you Calendar, 7-Day Planner, Timeline or Report view to all your new and confirmed appointments, all at once or by schedule, personnel or service location. Using Appointment Workarea you can confirm, deny or delete appointments. Here you also have the ability to run custom reports, print appointment summaries and export appointment and customer contact information to your favorite day-planner.
- **Customer Appointment Scheduler.** With Customer Appointment Scheduler, you can give your customers online access to your appointment book. By following the link from your web site or by clicking on the link you send them by e-mail, your customers will be able to see the list of services you offer, pick the one they want, select date and time for an appointment, fill in their contact information and book the appointment. Customers can also check, cancel and reschedule their appointments using your Customer Appointment Scheduler and choose to be reminded of their appointments by e-mail.

## Beginner Checklist

Before you get started with your account setup, make sure you have following information available:

### Business Operations:

- Days and times that you want to show your business as open
- Holidays observed by your business
- A brief description of your business or a greeting message
- Your business Web site address (URL), if you have one

### Services and Schedules:

- A list of all the types of services you offer with short descriptions
- How long the service takes for the customer
- A list of times you want to schedule for your personnel that you might not want your customers to see, i.e. internal services or appointments

### Personnel:

- A list of your personnel
- The e-mail addresses for your personnel, if you want them to receive notification of their appointments by e-mail
- A list of services performed by each person
- A list of holidays observed by each person
- A list of vacation days and days off scheduled by each person

### Service Locations:

- A list of your office and service locations
- A list of services that are offered at each location
- A list of any days that the location is closed
- Business hours of each service location
- Maximum number of customers that can be scheduled at a given location

## Account Activation

The very first time you login to Online Appointment Scheduler after signup you may be asked to activate your account by verifying information supplied during enrollment process and selecting the time zone for your main office location.

The picture below illustrates account activation page:

**Please, complete your Online Appointment Manager account profile**

In order to activate your account, fill out blanks in the form below.

Account Profile	
Business Category:	- Beauty Salons
Business Name:	Western Beauty Salon and Spa
Address:	123 Main Street
	Hometown, CO 80763
	United States
Phone:	(303) 436-9342 ext. (optional)
Fax:	(303) 436-9366 (optional)
E-mail:	mary@westernbeautyspa.com
E-mail Preference:	<input type="radio"/> Rich Text (HTML) <input checked="" type="radio"/> Plain Text (ASCII)
Web Site:	www.westernbeautyspa.com (optional)
Time Zone:	US/Mountain

Make sure your business contact information is correct, select your business category and time zone, and then click on the "Save" button at the bottom of the form.

## New Account Setup

Once your Online Appointment Scheduler account is activated it needs to be configured to match your specific scheduling requirements and operational practices. To simplify the configuration process, Online Appointment Scheduler prompts you with Account Setup Helper, a step-by-step guide through the most important features of Online Appointment Scheduler.

WELCOME TO YOUR NEW ACCOUNT

It is easy to get started -- Account Setup Helper will guide you through the entire configuration process. Complete all steps listed below and your business will be ready to accept appointments online.

**You have 10 configuration steps to complete**

- ➔ Configure Business Hours
- ➔ Create Personnel Record
- ➔ Create Schedule
- ➔ Create Custom Form (Optional)
- ➔ Create Service Location (Optional)
- ➔ Create Direct Offer (Optional)
- ➔ Configure Business Holidays (Optional)
- ➔ Define and Publish Business Policies (Optional)
- ➔ Setup Personalization (Optional)
- ➔ View other Account Setup settings

[Get Started!](#)

Account Setup Helper allows you to get started with online appointment scheduling very quickly, while further customization can be performed in Account Setup Center.

If you want to skip the Account Setup Helper and configure your account manually, you can do so by proceeding directly to the Account Setup Center. Online Appointment Scheduler carefully keeps track of all manual configuration changes and updates your setup status in Account Setup Helper automatically.

The following chapters of this manual guide you through the basic account configuration using the Account Setup Helper. To learn how to configure your account manually, go directly to the Manual Account Configuration chapters.

## Navigating Account Setup Helper

Account Setup Helper allows you to go through account configuration pages step-by-step. It also allows you to jump to a particular configuration step by clicking on the corresponding step title. All completed steps are shown with green checkmarks while those steps that still await your input are displayed next to red arrows:

You have 6 configuration steps to complete

<ul style="list-style-type: none"><li>✓ Configure Business Hours</li><li>✓ Create Personnel Record</li><li>✓ Create Schedule</li><li>➔ Create Custom Form (Optional)</li><li>➔ Create Service Location (Optional)</li></ul>	<ul style="list-style-type: none"><li>➔ Create Direct Offer (Optional)</li><li>✓ Configure Business Holidays (Optional)</li><li>➔ Define and Publish Business Policies (Optional)</li><li>➔ Setup Personalization (Optional)</li><li>➔ View other Account Setup settings</li></ul>
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To begin your account configuration, click on the “Get Started!” button:



Each configuration step can be either completed at once, skipped to be returned to at a later time, or completely dismissed:

- Save changes and mark this configuration step completed
- Discard changes, I will come back to this step later
- Discard changes but mark this step completed anyway

Even if you dismiss some configuration steps in the Account Setup Helper, you can always get back to it in Account Setup Center.

## Configure Business Hours

The very first step is to configure your business hours. By default, your hours of operation are set to be open from 8:00 AM to 6:00 PM each day of the week:

**Configure Business Hours**

Week Day	Business Hours			
Sunday	From: 08:00 AM	To: 06:00 PM	Close	Split
Monday	From: 08:00 AM	To: 06:00 PM	Close	Split
Tuesday	From: 08:00 AM	To: 06:00 PM	Close	Split
Wednesday	From: 08:00 AM	To: 06:00 PM	Close	Split
Thursday	From: 08:00 AM	To: 06:00 PM	Close	Split
Friday	From: 08:00 AM	To: 06:00 PM	Close	Split
Saturday	From: 08:00 AM	To: 06:00 PM	Close	Split

- Save changes and mark this configuration step completed  
 Discard changes, I will come back to this step later  
 Discard changes but mark this step completed anyway

To change business hours for a particular day:

- Use the “From:” pull-down list to select correct open time setting
- Use the “To:” pull-down list to select correct close time setting
- If your open or close times are not aligned with hour or half an hour, click on the “Switch to Arbitrary Minutes mode” button in order to enter times like 8:15 AM or 4:50 PM:

Week Day	Business Hours			
Sunday	From: 08:15 AM	To: 04:50 PM	Close	Split
Monday	From: 08:00 AM	To: 06:00 PM	Close	Split
Tuesday	From: 08:00 AM	To: 06:00 PM	Close	Split
Wednesday	From: 08:00 AM	To: 06:00 PM	Close	Split
Thursday	From: 08:00 AM	To: 06:00 PM	Close	Split
Friday	From: 08:00 AM	To: 06:00 PM	Close	Split
Saturday	From: 08:00 AM	To: 06:00 PM	Close	Split

To set a day of the week to be “Closed for Business”:

- Click on the “Close” button next to the business hours for a particular week day. The result of this action should look like the illustration below:

Week Day	Business Hours			
Sunday	Closed for Business		Open	
Monday	From: 08:00 AM	To: 06:00 PM	Close	Split

- To re-open the week day marked as closed, click on the “Open” button next to the “Closed for Business” caption.

To setup a lunch break or multiple technical breaks during the day:

- Click on the “Split” button next to the business hours for a particular week day. The result of this action should look like the illustration below:

Week Day	Business Hours			
Sunday	From: 08:00 AM	To: 01:00 PM	Close	Split
	From: 01:30 PM	To: 06:00 PM		
Monday	From: 08:00 AM	To: 06:00 PM	Close	Split

- Adjust time intervals to match your break times.
- Use “Split” button again to setup multiple breaks during the day

Week Day	Business Hours					
Sunday	From: 08:00 AM	To: 10:00 AM	Close	Split		
	From: 10:30 AM	To: 01:00 PM			Close	Split
	From: 01:30 PM	To: 06:00 PM			Close	Split
Monday	From: 08:00 AM	To: 06:00 PM	Close	Split		

- Use “Merge” button to collapse multiple open intervals into one, effectively removing breaks during the day.
- To remove a break, you can also adjust time intervals to overlap and then use “Validate” button to collapse two intervals into one.

Once business hours are configured to match your business hours of operation, click on the “Create Personnel Record” button to save changes and proceed to the next configuration step.

## Create Personnel Record

All people on your staff who accept appointments and perform services should have corresponding personnel records in Online Appointment Scheduler. People who do not service customers or perform administrative tasks only do not need to be registered as personnel. For example, if your business is a massage therapy, you should create personnel records for all therapists, but not for the receptionist, accountant or administrator.

Account Setup Helper prompts you to create the very first personnel record on your account. This is sufficient to get started with appointment scheduling. You can always add more personnel and setup schedule associations at a later time in Account Setup Center.

First Personnel Record Setup page is divided into four sections:

- General
- Work Hours
- Days Off
- Vacations

Each section is represented in its own tab. You can switch between tabs by clicking on the tab itself or by using “Next” and “Previous” buttons on the bottom of the page to go one step forward or one step back. The First Personnel Record Setup page is illustrated below:

### Create Personnel Record

General	Work Hours	Days Off	Vacations
First Name:	<input type="text"/>		
Last Name:	<input type="text"/>		
Title:	<input type="text"/> (optional)		
Phone:	<input type="text"/> (optional)	ext. <input type="text"/>	(optional)
E-mail:	<input type="text"/> (optional)		
E-mail Preference:	<input checked="" type="radio"/> Rich Text (HTML) <input type="radio"/> Plain Text (ASCII)		

**WARNING:** E-mail address is required to receive appointment notifications.  
 In order for the personnel representative to receive appointment notifications e-mail address needs to be specified. To suppress e-mail notifications for this particular personnel representative you may intentionally leave e-mail address blank.

Save changes and mark this configuration step completed  
 Discard changes, I will come back to this step later  
 Discard changes but mark this step completed anyway

## General

General tab of the Personnel Record Setup page collects name, title and contact details for your staff member:

General	Work Hours	Days Off	Vacations
First Name:	<input type="text" value="Mary"/>		
Last Name:	<input type="text" value="Johnson"/>		
Title:	<input type="text" value="Senior Therapist"/> (optional)		
Phone:	<input type="text"/> (optional)	ext.	<input type="text"/> (optional)
E-mail:	<input type="text" value="mary@westernbeautysps.com"/> (optional)		
E-mail Preference:	<input checked="" type="radio"/> Rich Text (HTML) <input type="radio"/> Plain Text (ASCII)		

**WARNING:** E-mail address is required to receive appointment notifications.  
In order for the personnel representative to receive appointment notifications e-mail address needs to be specified. To suppress e-mail notifications for this particular personnel representative you may intentionally leave e-mail address blank.

- **First Name** and **Last Name** are required
- **Title**, **Phone**, **Extension** and **E-mail** are optional
- **E-mail Preference** determines the type of e-mail that can be delivered to the e-mail address specified. Most modern e-mail reader applications and web-based e-mail accounts support Rich Text (HTML) e-mail format. If old version of AOL e-mail client or DOS-based e-mail reader is used it is recommended to use the Plain Text (ASCII) option.

**IMPORTANT:** Providing e-mail address for the person is highly recommended since it enables Online Appointment Scheduler to send new appointment notification, appointment rescheduling notification and appointment cancellation notification e-mails directly to the person responsible for the appointment

## Work Hours

Work Hours tab of the Personnel Record Setup defines weekly work hours for the staff member. By default, Account Setup Helper is using account business hours as a template for the personnel work hours. Work hours can be customized:

General	<b>Work Hours</b>	Days Off	Vacations
Week Day	Work Hours		
Sunday	Off Work <input type="button" value="Make Work"/>		
Monday	From: 08:00 AM	To: 06:00 PM	<input type="button" value="Off Work"/> <input type="button" value="Split"/>
Tuesday	From: 08:00 AM	To: 06:00 PM	<input type="button" value="Off Work"/> <input type="button" value="Split"/>
Wednesday	From: 08:00 AM	To: 06:00 PM	<input type="button" value="Off Work"/> <input type="button" value="Split"/>
Thursday	From: 08:00 AM	To: 06:00 PM	<input type="button" value="Off Work"/> <input type="button" value="Split"/>
Friday	From: 08:00 AM	To: 06:00 PM	<input type="button" value="Off Work"/> <input type="button" value="Split"/>
Saturday	From: 10:00 AM	To: 02:00 PM	<input type="button" value="Off Work"/> <input type="button" value="Split"/>
<input type="button" value="Validate"/> <input type="button" value="Switch to Arbitrary Minutes Mode"/>			
<p><b>NOTE:</b> Personnel work hours must always be within account business hours.  <a href="#">Click here</a> to inspect and change account business hours. You may also change account business hours at any time from <a href="#">Account Setup Center</a>. (Clicking on any of the above links will discard any changes pending to personnel work hours)</p>			
<input type="button" value=" &lt; Previous"/>		<input type="button" value=" Next &gt;"/>	

To change work hours for a particular day:

- Use the “From:” pull-down list to select correct open time setting
- Use the “To:” pull-down list to select correct close time setting
- If your open or close times are not aligned with hour or half an hour, click on the “Switch to Arbitrary Minutes mode” button in order to enter times like 11:20 AM or 3:15 PM:

Week Day	Work Hours		
Sunday	From: 08:00 AM	To: 06:00 PM	<input type="button" value="Off Work"/> <input type="button" value="Split"/>
Monday	From: 08:00 AM	To: 06:00 PM	<input type="button" value="Off Work"/> <input type="button" value="Split"/>
Tuesday	From: 08:00 AM	To: 06:00 PM	<input type="button" value="Off Work"/> <input type="button" value="Split"/>
Wednesday	From: 08:00 AM	To: 06:00 PM	<input type="button" value="Off Work"/> <input type="button" value="Split"/>
Thursday	From: 08:00 AM	To: 06:00 PM	<input type="button" value="Off Work"/> <input type="button" value="Split"/>
Friday	From: 08:00 AM	To: 06:00 PM	<input type="button" value="Off Work"/> <input type="button" value="Split"/>
Saturday	From: 11:20 AM	To: 03:15 PM	<input type="button" value="Off Work"/> <input type="button" value="Split"/>
<input type="button" value="Validate"/> <input type="button" value="Switch to Preset Minutes Mode"/>			

To set a day of the week to be “Off Work”:

- Click on the “Off Work” button next to the work hours for a particular week day. The result of this action should look like the illustration below:

Week Day	Work Hours			
Sunday	Off Work		Make Work	
Monday	From: 08:00 AM	To: 06:00 PM	Off Work	Split

- To re-open the week day marked as closed, click on the “Make Work” button next to the “Off Work” caption.

To setup a lunch break or multiple technical breaks during the day:

- Click on the “Split” button next to the business hours for a particular week day. The result of this action should look like the illustration below:

Week Day	Work Hours			
Sunday	From: 08:00 AM	To: 01:00 PM	Off Work	Split
	From: 01:30 PM	To: 06:00 PM	Off Work	Split
Monday	From: 08:00 AM	To: 06:00 PM	Off Work	Split

- Adjust time intervals to match your break times.
- Use “Split” button again to setup multiple breaks during the day

Week Day	Work Hours			
Sunday	From: 08:00 AM	To: 10:00 AM	Off Work	Split
	From: 10:30 AM	To: 01:00 PM	Off Work	Split
	From: 01:30 PM	To: 06:00 PM	Off Work	Split
Monday	From: 08:00 AM	To: 06:00 PM	Off Work	Split

- Use “Merge” button to collapse multiple open intervals into one, effectively removing breaks during the day.
- To remove a break, you can also adjust time intervals to overlap and then use “Validate” button to collapse two intervals into one.

**IMPORTANT:** Online Appointment Scheduler does not allow appointments to be booked outside of personnel work hours. Each available appointment with the staff member in question has to be within his or her personnel work hours for the entire duration of the appointment.

## Days Off

Days off define calendar days when the person is off work. Those can be personal holidays, travel or other days when your staff member does not accept appointments for. You should **not** use days off tab to enter:

- **Business Holidays:** General business holidays are already set as account holidays in the previous configuration step. Setting up the same holidays on the personnel level is redundant and not needed. Online Appointment Scheduler automatically applies all business holidays to personnel.
- **Vacations:** There is a separate setup tab to enter off work periods that span more than one day.

**Create Personnel Record**

General	Work Hours	<b>Days Off</b>	Vacations
<b>Add New Day Off</b>			
Date: <input style="width: 150px;" type="text" value="MM/DD/YYYY"/>			
		<input type="radio"/> On specified date only <input type="radio"/> Same day of the week every week starting on specified date <input type="radio"/> Same day of the month every month starting on specified date <input type="radio"/> Same date every year starting on specified date	
<input type="button" value="Add"/>			
<input type="button" value=" &lt; Previous"/>		<input type="button" value=" Next &gt;"/>	
<input checked="" type="radio"/> Save changes and mark this configuration step completed <input type="radio"/> Discard changes, I will come back to this step later <input type="radio"/> Discard changes but mark this step completed anyway			
<input type="button" value="Create Schedule"/>		<input type="button" value="Cancel"/>	<input type="button" value="Reset"/>

To add a one-time day off:

- Enter a day-off date in the “Date” field, for example “02/14/2003”.
- Select “On specified date only” option
- Click “Add” button:

<b>Add New Day Off</b>	
Date: <input style="width: 150px;" type="text" value="02/14/2003"/>	MM/DD/YYYY
	<input type="radio"/> On specified date only <input type="radio"/> Same day of the week every week starting on specified date <input type="radio"/> Same day of the month every month starting on specified date <input type="radio"/> Same date every year starting on specified date
<input type="button" value="Add"/>	

To add repetitive day off:

- Enter a first observed date in the “Date” field, for example “01/07/2003”
- Select one of the “Same day...” or “Same date...” options, for example “Same day every week starting on specified date”
- Click “Add” button:

Add New Day Off

Date:  MM/DD/YYYY

On specified date only

Same day of the week every week starting on specified date

Same day of the month every month starting on specified date

Same date every year starting on specified date

Days off are being added to the table on the top of the page. To remove the day off from the list, click on the “Delete” button next to it. To make changes to the day off, delete it first and re-add the day off to the list using correct start date and repetition setting:

Days Off

Every Tuesday since January 07, 2003	<input type="button" value="Delete"/>
On February 14, 2003 (Friday)	<input type="button" value="Delete"/>

Add New Day Off

Date:  MM/DD/YYYY

On specified date only

Same day of the week every week starting on specified date

Same day of the month every month starting on specified date

Same date every year starting on specified date

## Vacations

Vacations define periods of time spanning several days or weeks when the person is off work. Fresh vacations tab is illustrated below:

**Create Personnel Record**

General	Work Hours	Days Off	<b>Vacations</b>
---------	------------	----------	------------------

**No Vacations**

Add New Vacation

From: <input type="text" value="MM/DD/YYYY"/>	To: <input type="text" value="MM/DD/YYYY"/>
---	---

Save changes and mark this configuration step completed  
 Discard changes, I will come back to this step later  
 Discard changes but mark this step completed anyway

To add a vacation, start and end date **inclusive**:

- Enter vacation start date in the “From” field, for example “03/08/2003”
- Enter vacation end date in the “To” field, for example “03/16/2003”
- Click “Add” button:

Add New Vacation

From: <input type="text" value="03/08/2003"/> MM/DD/YYYY	To: <input type="text" value="03/16/2003"/> MM/DD/YYYY
--	--

Vacations are being added to the table on the top of the page. To remove the vacation from the list, click on the “Delete” button next to it. To make changes to the vacation, delete it first and re-add the vacation to the list using new dates.

General	Work Hours	Days Off	<b>Vacations</b>
---------	------------	----------	------------------

Vacations

From March 08, 2003 (Saturday) to March 16, 2003 (Sunday)	<input type="button" value="Delete"/>
---	---------------------------------------

Add New Vacation

From: <input type="text" value="MM/DD/YYYY"/>	To: <input type="text" value="MM/DD/YYYY"/>
---	---

## Create Schedule

Schedule is the most important entity in Online Appointment Scheduler. Schedules represent your online appointment books, describe services you offer, define your appointment availability and keep track of personnel assignments. As such, they require particular attention in configuration and further maintenance.

If you offer multiple types of services to your customers, you should create a separate schedule for each service. Account Setup Helper prompts you to create the very first schedule on your account, just to help you to get started. All additional schedules need to be created in Account Setup Center. You can use your original schedule as a template for any other schedules you may wish to create.

Online Appointment Scheduler supports two distinct types of schedules:

- **Personnel-type** schedules are used for services that require customers schedule appointments with particular members of your staff. For example, when patients make appointments for annual checkup they ask for their physicians, when customers schedule their haircuts they pick their stylists – those are examples of personnel-type (doctor, stylist) schedules (annual physical, haircut).
- **Capacity-type** schedules are for services that do not specifically define who is performing the service or if such assignment is not even possible. Capacity-type schedules give you finer control over available appointment times and well as optionally allow you schedule multiple appointments at the same time. Good examples of services that require capacity-type schedules are oil change service, marketing seminar registration, yoga class or tanning session.

Before you start to configure your first schedule it is important to decide which type of scheduling suits your services better – personnel type or capacity type.

**IMPORTANT:** It is possible to have schedules of both types present on your account, but any given schedule can not be part- personnel and part- capacity, it is always either personnel or capacity.

Since personnel-type schedule configuration is significantly different from capacity-type schedule setup, those two types of configurations are described in two separate chapters. If you are setting up a personnel-type schedule, continue reading this document through **A. Personnel-type Schedule Setup**; if you would like to configure your first schedule as capacity-type one, skip the next chapter and go directly to **B. Capacity-type Schedule Setup**.

## A. Personnel-type Schedule Setup

First Schedule Setup page is divided into five sections:

- General
- Settings
- Business Hours
- Personnel
- Notifications

Each section is represented in its own tab. You can switch between tabs by clicking on the tab itself or by using “Next” and “Previous” buttons on the bottom of the page to go one step forward or one step back. The First Schedule Setup page is illustrated below:

**Create Schedule**

<b>General</b>	Settings	Business Hours	Personnel	Notifications												
Schedule Name: <input style="width: 90%;" type="text"/>																
Description: <div style="border: 1px solid gray; height: 40px; width: 90%;"></div>																
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">Appointments:</th> <th style="width: 40%;">Internal</th> <th style="width: 45%;">External</th> </tr> </thead> <tbody> <tr> <td>Regular:</td> <td><input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed</td> <td><input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed</td> </tr> <tr> <td>Recurring:</td> <td><input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed</td> <td><input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed</td> </tr> <tr> <td>Rescheduling:</td> <td><input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed</td> <td><input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed</td> </tr> </tbody> </table>					Appointments:	Internal	External	Regular:	<input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed	<input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed	Recurring:	<input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed	<input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed	Rescheduling:	<input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed	<input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed
Appointments:	Internal	External														
Regular:	<input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed	<input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed														
Recurring:	<input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed	<input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed														
Rescheduling:	<input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed	<input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed														
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Type:</td> <td style="width: 35%;">Personnel</td> <td style="width: 50%; text-align: center;"><input type="button" value="Change to Capacity"/></td> </tr> </table>					Type:	Personnel	<input type="button" value="Change to Capacity"/>									
Type:	Personnel	<input type="button" value="Change to Capacity"/>														
<input type="button" value="Next &gt;"/>																
<p> <input checked="" type="radio"/> Save changes and mark this configuration step completed  <input type="radio"/> Discard changes, I will come back to this step later  <input type="radio"/> Discard changes but mark this step completed anyway         </p>																
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;"><input type="button" value="Create Custom Form (Optional)"/></td> <td style="width: 33%;"><input type="button" value="Cancel"/></td> <td style="width: 33%;"><input type="button" value="Reset"/></td> </tr> </table>					<input type="button" value="Create Custom Form (Optional)"/>	<input type="button" value="Cancel"/>	<input type="button" value="Reset"/>									
<input type="button" value="Create Custom Form (Optional)"/>	<input type="button" value="Cancel"/>	<input type="button" value="Reset"/>														

## General

General schedule settings define how its service is identified and presented to your customers. This also includes appointment scheduling permissions and schedule type:

General	Settings	Business Hours	Personnel	Notifications
Schedule Name:	Hair Care: Design Cut and Blow Dry \$45			
Description:	All of our cuts include a consultation to determine the best style for you, a relaxing scalp massage, shampoo and blow dry.			
Appointments:	<b>Internal</b>		<b>External</b>	
Regular:	<input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed		<input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed	
Recurring:	<input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed		<input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed	
Rescheduling:	<input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed		<input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed	
Type:	Personnel	Change to Capacity		

First of all, fill out the “Schedule Name” and “Description” fields. Use the name of the service which the schedule represents as a schedule name. Put service description into the description field:

Schedule Name:	Hair Care: Design Cut and Blow Dry \$45
Description:	All of our cuts include a consultation to determine the best style for you, a relaxing scalp massage, shampoo and blow dry.

Schedule name is used as identification of service for both your customers making appointments using your Customer Appointment Scheduler, and your staff booking call-in appointments in Online Appointment Scheduler. If you are setting up schedule for a fixed price service, you may include the service fee into the schedule name for the reference.

Schedule description is only presented to your customers on your Customer Appointment Scheduler pages; it is not used inside Online Appointment Scheduler for the purpose of making appointments. Therefore, you should phrase it short but descriptive from the customer point of view.

Both schedule name and description **should not** include marketing pitches or any special offer details. Online Appointment Scheduler supports Direct Offer feature that is much more appropriate for this purpose. Since schedule name and description are included on appointment notification, confirmation and reminder e-mails, any future-tense verbs or intonations that indicate the customer is yet to book an appointment should be avoided.

There are two ways appointments can be made on a schedule:

- **Externally:** External appointments are made by your customers online using your Customer Appointment Scheduler
- **Internally:** Internal appointments are made by you, your receptionist or members of your staff in Online Appointment Scheduler

Internal and external appointment settings can be configured independently, for example you can allow your staff to reschedule appointments while not allowing your customers to do it themselves (this is a default setting):

Appointments:	Internal	External
Regular:	<input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed	<input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed
Recurring:	<input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed	<input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed
Rescheduling:	<input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed	<input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed

- **Regular** appointment setting determines if appointments can be made at all on the schedule. By default, both internal and external scheduling is allowed. If you would like to use the schedule for internal appointments only, select “NOT Allowed” option under the “External” column. This will completely hide the service from customers browsing your online scheduling pages.
- **Recurring** option defines if standing or recurring appointments should be allowed on the schedule or not. This option is not enabled by default. If your customers sign up for recurring services, such as training session every week on Tuesdays for two months, you should enable recurring appointments by selecting “Allowed” in either “Internal”, “External” or both columns.
- **Rescheduling** allows you, your staff and your customers to change appointment date and time after appointment has been already made. It also allows your staff to update appointment information after the fact. By default, internal rescheduling is allowed while external is not. If you would like your customers to reschedule appointments without having to call your office, you should change the rescheduling setting to “Allowed” in the “External” column.

Schedule type is set to “Personnel” by default:

Type:	Personnel	Change to Capacity
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**IMPORTANT:** You **should not** change this setting if you are setting up personnel-type scheduling. Changing schedule type affects the rest of the schedule setup.

## Settings

Appointment availability and scheduling rules are configured in the settings tab of the First Schedule Setup Page:

General	Settings	Business Hours	Personnel	Notifications
Scheduling Mode:		Adaptive	<a href="#">Change to Standard Mode</a>	
Appointment Interval:		<input type="text" value="60"/> minutes		
Service Duration:		<input type="text" value="60"/> minutes	<a href="#">Make it Flexible</a>	
Lead-in:		<input type="text" value="0"/> minutes before appointment		
Lead-out:		<input type="text" value="0"/> minutes after appointment		
Concurrent Limit:		<input type="text" value="5"/> appointments per customer		
Valid From:		<input type="text"/> MM/DD/YYYY (optional)		
Valid To:		<input type="text"/> MM/DD/YYYY (optional)		
Appointments:		Internal	External	
Reservation Deadline:		<input type="text" value="0"/> hour(s) <input type="button" value="v"/>	<input type="text" value="2"/> day(s) <input type="button" value="v"/>	
Rescheduling Deadline:		<input type="text" value="0"/> hour(s) <input type="button" value="v"/>	<input type="text" value="1"/> day(s) <input type="button" value="v"/>	
Cancellation Deadline:		<input type="text" value="0"/> hour(s) <input type="button" value="v"/>	<input type="text" value="1"/> day(s) <input type="button" value="v"/>	
Auto Confirm:		<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Auto Cancel:		<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Allow Appointment Delete:		<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Reservation Disclosure:		<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	

- **Scheduling Mode** can be either Adaptive or Standard. Scheduling mode only applies to personnel-type schedules, and determines exactly how appointment scheduling system allocates available appointment times based on account, schedule and personnel settings, as well as time blocks and existing appointments.

'Adaptive' scheduling mode takes into account all the same factors as 'Standard' mode, as well as 'Lead-In' and 'Lead-Out' times, and then tries to optimize work day by placing appointments together as close as possible without creating scheduling conflicts. It takes into account existing appointments and tries to place available appointment times around those to minimize time gaps between appointments. 'Adaptive' scheduling mode is recommended for users with flexible service durations, multiple services (schedules), and busy workdays.

'Standard' scheduling mode works best when personnel daily schedule is regular and when all appointments should happen at predetermined time, such as always on 8:00 AM, 9:00 AM, 10:00 AM, etc. In 'Standard' mode, available appointment times are determined based on a combination of schedule business hours, personnel work hours, time blocks and appointment interval. 'Standard' mode always spreads available appointment times equally spaced by Appointment Interval. 'Standard' scheduling mode does not support 'Lead-In' and 'Lead-Out' times, which are described later in this chapter.

Scheduling Mode is set to 'Adaptive' by default, as it is the most commonly used option.

To change Scheduling Mode to 'Standard', click on the "Change to Standard Mode" button, which is located next to the 'Scheduling Mode':

Scheduling Mode: Adaptive	Change to Standard Mode
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- **Appointment Interval** defines the period of time between beginnings of appointments. It is measured in minutes and by default is set to one hour. For example, if your customers come in every 15 minutes, appointment interval should be set accordingly – to 15 minutes:

Appointment Interval: 15 minutes
----------------------------------

- **Service Duration** is the amount of time it takes you to perform the service. This is also the amount of time your customers should expect to spend for an appointment. By default, service duration is set to be the same as appointment interval at 60 minutes:

Appointment Interval: 60 minutes	
Service Duration: 60 minutes	Make it Flexible

Service duration can be the same, less than or greater than appointment interval – all three cases are significantly different in the way it affects appointment scheduling:

- **Appointment Interval is the same as Service Duration:** For example, both values are set to be 30 minutes:

Appointment Interval: 30 minutes	
Service Duration: 30 minutes	Make it Flexible

In this case, appointments start every thirty minutes and each appointment takes thirty minutes. There are no time gaps between appointments.

- **Appointment Interval is greater than Service Duration:** For example, appointment interval is set to 40 minutes while service duration is set to 30 minutes:

Appointment Interval: 40 minutes	
Service Duration: 30 minutes	Make it Flexible

In this case appointments start every 40 minutes, but it only takes half an hour to service the customer. As a result of this configuration, your customers expect to spend only 30 minutes on appointment while your staff has 10 minute gap between the end of an appointment and beginning of the next one. This gap can be used for the break, cleanup, etc.

- **Appointment Interval is less than Service Duration:** In most cases, this scenario is useful when appointment interval is *significantly less* than service duration and when minimizing unused staff time is essential. For example, if appointment interval is set to 15 minutes and service duration is set to 45 minutes:

Appointment Interval:	<input type="text" value="15"/> minutes
Service Duration:	<input type="text" value="45"/> minutes <input type="button" value="Make it Flexible"/>

Appointments are available every 15 minutes but it takes 45 minutes to service the customer. Each booked appointment will take 3 available appointment slots from your appointment book to make sure there is no overbooking. Compared to the 45/45 scenario, 15/45 setup your customers have more options on when to schedule an appointment, as appointments are available every 15 minutes; at the same time you are not risking 45 minute gap between appointments because the next customer can schedule right after, 15, 30 or 45 minutes later the end of the previous appointment.

Choosing the best match to your scheduling practices from the scenarios described above can be challenging at first. In most cases, it is recommended to start with the most simple case when appointment interval is the same as service duration and consider changing these settings only if at a later time you determine that appointment availability is not the same as you need it to be.

By default, service duration is a fixed setting - meaning that all appointments made for the schedule are expected to take same amount of time. However, if your service time varies based on customer preference or organizational arrangements, you can make service duration flexible to accommodate appointments of different durations. For example, if schedule is intended for both one-hour or two-hour coaching sessions, then it should use two separate service duration settings. If alternative service durations are enabled on the schedule, your customers and your staff are prompted to choose the length of an appointment at the time when they make one. Default service duration is pre-selected.

To enable service duration alternatives in a flexible format, click on the “Make it Flexible” button next to the service duration setting. The form will expand to accommodate additional fields for alternative service durations:

Service Duration:	Default:	<input type="text" value="45"/> minutes
	Alternative:	<input type="text"/> minutes (optional)
	<input type="button" value="More..."/> <input type="button" value="Clear All"/>	

You can add as many alternative service durations as your service requires by entering alternative value and then clicking on the “More...” button to expand the list of alternative durations. Schedule Editor will automatically sort alternative service durations and remove duplicates.

Here is an example of schedule setup that allows 15, 20, 45 minute, as well as one-hour appointments. In this example, 45 minute appointment duration is set as default:

Service Duration:	Default:	<input type="text" value="45"/> minutes
	Alternative:	<input type="text" value="15"/> minutes (optional)
		<input type="text" value="20"/> minutes (optional)
		<input type="text" value="60"/> minutes (optional)
		<input type="text"/> minutes (optional)
<input type="button" value="More..."/> <input type="button" value="Clear All"/>		

To change the default service duration, you have to **swap** its value with one of the alternatives. Retyping the default will drop the old service duration default without adding it to the list of alternatives.

To remove unwanted alternative service durations, simply clear form fields that list them. Schedule Editor will automatically update the list when you go to the next schedule configuration step.

To remove all alternative service duration settings and to revert back to the fixed service duration mode, click on the “Clear All” button. This action will remove all alternative durations from the schedule and will set default duration value to be the only one allowed by the schedule:



Service Duration:  minutes

- **Lead-in** option allows to reserve additional time before each appointment. This might be needed, for example, if you require preparation time before beginning of each appointment and need to make sure that appointments are not scheduled back-to-back, leaving you with no time for preparation procedures.

Lead-in option can only be used with Personnel-type Schedules in 'Adaptive' scheduling mode. Lead-in time can be used together with the 'Lead-out' option, but it is not required to have both values set. Even if used alone, Lead-in setting can provide enough buffering time between appointments.

To set a Lead-in to, for example, 30 minutes before each appointment, enter '30' in the corresponding field:



Lead-in:  minutes before appointment

- **Lead-out** option allows to reserve additional time after every appointment. This might be needed, for example, if you require time for cleanup or driving back after each appointment, making sure that appointments are not scheduled back-to-back.

Similar to Lead-in, Lead-out option can only be used with Personnel-type Schedules in 'Adaptive' scheduling mode. Lead-out time can be used together with the 'Lead-in' option, but it is not required to have both values set. Even if used alone, Lead-out can provide enough buffering time between appointments.

To set a Lead-out setting to, for example, 15 minutes after every appointment, enter '15' in the corresponding field:



Lead-out:  minutes after appointment

**IMPORTANT:** Lead-in and lead-out times only work between appointments, and not with time blocks or business hours. If 'no-appointments' times are required at the beginning and at the end of the business day, schedule business hours should be adjusted accordingly to accommodate such requirement.

- **Concurrent Limit** is a maximum number of upcoming appointments any given customer can have booked for the schedule at a time. Concurrent limit is a security feature that

prevents dishonest customers to book your entire schedules by making repetitive appointments. If your customer audience is trusted or if a lot of your customers schedule recurrent appointments way in advance, you can increase this number to a greater value:

Concurrent Limit:	<input type="text" value="30"/>	appointments per customer
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- **Valid From** and **Valid To** dates determine seasonal service availability conditions or exact dates for one-time event schedule. For example, three-day seminar schedule has to have “Valid from” and “Valid to” dates:

Valid From:	<input type="text" value="02/25/2003"/>	MM/DD/YYYY (optional)
Valid To:	<input type="text" value="02/27/2003"/>	MM/DD/YYYY (optional)

Valid schedule dates limit schedule availability to allow appointments made for the “Valid from” date and later, and before or on the “Valid to” date. “Valid from” and “Valid to” dates are inclusive and optional. These dates do not affect schedule visibility to your customers: for example, even if the “Valid from” date is still in the future your customers can see the schedule and make appointments for it within valid dates.

- **Reservation, Rescheduling and Cancellation Deadlines** define how much time in advance you allow for making an appointment, rescheduling an appointment and canceling an appointment respectively. Deadlines can be specified in hours, days or months. Minimum setting for each one of the active deadlines is one hour, if any deadline is set to 0 (‘zero’) than it is considered current. In other words, corresponding action is allowed on all future appointments with the ‘zero’ deadline, no matter how close the appointment time is to now. Deadlines can not be configured with negative values, as back-dated actions are not allowed by Online Appointment Scheduler.

For example, if you require your customers to keep an advance of at least 2 days before the appointment to book it, 12 hours to reschedule it and one day to cancel, while not requiring deadlines on internal scheduling, it you should set respective values as pictured below:

Appointments:	Internal	External
Reservation Deadline:	<input type="text" value="0"/> hour(s) ▾	<input type="text" value="2"/> day(s) ▾
Rescheduling Deadline:	<input type="text" value="0"/> hour(s) ▾	<input type="text" value="12"/> hour(s) ▾
Cancellation Deadline:	<input type="text" value="0"/> hour(s) ▾	<input type="text" value="1"/> day(s) ▾

Reservation, rescheduling and cancellation deadlines can be set separately for internal versus external appointments. This allows you, as in example above, to force your customers to obey deadlines while working with your Customer Appointment Scheduler, and keep your staff from deadline restrictions altogether.

**IMPORTANT:** All three types of deadlines are calculated in 24 hour clock and not your business hours clock. If you require time to catch up with new appointments and cancellations at the beginning of each day, you should set all deadlines to be at least 12 hours long.

**IMPORTANT:** If you plan to schedule appointments for the same day or the next day, you should not set the reservation deadline too high. Default reservation deadline setting (2 days) prevents

you from scheduling appointments within 2 days from today. To be able to book appointments for the same day, it is recommended to set reservation deadline to 0 (‘zero’) hours, effectively disabling the deadline. The same rule applies to cancellation and rescheduling deadlines.

- **Auto Confirm** and **Auto Cancel** are two independent options that define the way new appointment requests and appointment cancellation requests are processed. By default, each new external appointment and each external cancellation requires manual confirmation by you or your staff, while same actions taken internally do not require separate confirmations.

If you would like Online Appointment Scheduler automatically confirm each new external appointment instantly when it’s made, change the “Auto Confirm” setting to “Yes”. If same rule applies to cancellations, “Auto Cancel” can be also changed to “Yes”:

Auto Confirm:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No
Auto Cancel:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No

- **Allow Appointment Delete** option determines if ‘Delete’ action is allowed on appointments or not. It is not recommended to allow your customers to delete appointments themselves, though in most cases it is Ok for your staff members to do so. Default settings reflect indicate corresponding selections:

Allow Appointment Delete:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
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- **Reservation Disclosure** By default, the schedule is set up to present your customers with available appointment times only, while showing appointment times that were previously available to you and your staff. Reservation disclosure setting can be configured independently for internal and external scheduling.

Appointment times for which appointment reservations have been already made are hidden from customer's view if the reservation disclosure is configured to “No”. If reservation disclosure is configured as ‘Yes’, all previously available appointment times will be shown on the ‘Make Appointment’ page as grayed-out (disabled) buttons.

If you would like to change default behavior of the schedule to configure it to show all possible appointment times including the ones which are already reserved, set reservation disclosure option to “Yes”:

Reservation Disclosure:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No
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In this case, reserved appointment times will be shown to your customers for information purposes only, exactly in the same way it is shown to your staff. Changing reservation disclosure does not affect schedule appointment reservation logic.

**IMPORTANT:** Enabling reservation disclosure option **does not** compromise integrity and privacy of your online appointment calendar since Online Appointment Scheduler does not allow your customers to double-book appointments or see other customers’ names regardless of what reservation disclosure value is set to. Reservation disclosure setting applies to both external and internal appointment scheduling.

## Business Hours

Business Hours tab of the Schedule Setup defines weekly appointment availability hours for the schedule. By default, Account Setup Helper is using account business hours as a template for the schedule business hours:

General	Settings	Business Hours	Personnel	Notifications
Week Day		Business Hours		
Sunday	Closed for Business			Open
Monday	From: 08:00 AM	To: 06:00 PM	Close	Split
Tuesday	From: 08:00 AM	To: 06:00 PM	Close	Split
Wednesday	From: 08:00 AM	To: 06:00 PM	Close	Split
Thursday	From: 08:00 AM	To: 06:00 PM	Close	Split
Friday	From: 08:00 AM	To: 06:00 PM	Close	Split
Saturday	From: 08:00 AM	To: 02:00 PM	Close	Split
		Validate	Switch to Arbitrary Minutes Mode	

**NOTE:** Personnel-type Schedule business hours must always be within account business hours.  
[Click here](#) to inspect and change account business hours. You may also change account business hours at any time from [Account Setup Center](#). (Clicking on any of the above links will discard any changes pending to personnel-type schedule business hours)

To change schedule business hours for a particular day:

- Use the “From:” pull-down list to select correct open time setting
- Use the “To:” pull-down list to select correct close time setting
- If your open or close times are not aligned with hour or half an hour, click on the “Switch to Arbitrary Minutes mode” button in order to enter times like 08:15 AM or 1:15 PM for Saturday:

Week Day	Business Hours			
Sunday	Closed for Business			Open
Monday	From: 08:00 AM	To: 06:00 PM	Close	Split
Tuesday	From: 08:00 AM	To: 06:00 PM	Close	Split
Wednesday	From: 08:00 AM	To: 06:00 PM	Close	Split
Thursday	From: 08:00 AM	To: 06:00 PM	Close	Split
Friday	From: 08:00 AM	To: 06:00 PM	Close	Split
Saturday	From: 08:15 AM	To: 01:15 PM	Close	Split
		Validate	Switch to Preset Minutes Mode	

To set a day of the week to be “Closed”:

- Click on the “Close” button next to the work hours for a particular week day, for example, Monday. The result of this action should look as shown below:

Week Day	Business Hours
Sunday	Closed for Business <input type="button" value="Open"/>
Monday	Closed for Business <input type="button" value="Open"/>

- To re-open the week day marked as closed, click on the “Open” button next to the “Closed for Business” caption.

To setup a lunch break or multiple technical breaks during the day:

- Click on the “Split” button next to the business hours for a particular week day. The result of this action should look like the illustration below:

Week Day	Work Hours
Sunday <input type="button" value="Merge"/>	From: <input type="text" value="08:00 AM"/> To: <input type="text" value="01:00 PM"/> <input type="button" value="Off Work"/> <input type="button" value="Split"/>
	From: <input type="text" value="01:30 PM"/> To: <input type="text" value="06:00 PM"/> <input type="button" value="Off Work"/> <input type="button" value="Split"/>
Monday	From: <input type="text" value="08:00 AM"/> To: <input type="text" value="06:00 PM"/> <input type="button" value="Off Work"/> <input type="button" value="Split"/>

- Adjust time intervals to match your break times.
- Use “Split” button again to setup multiple breaks during the day

Week Day	Business Hours
Sunday	Closed for Business <input type="button" value="Open"/>
Monday <input type="button" value="Merge"/>	From: <input type="text" value="08:00 AM"/> To: <input type="text" value="01:00 PM"/> <input type="button" value="Close"/> <input type="button" value="Split"/>
	From: <input type="text" value="01:30 PM"/> To: <input type="text" value="06:00 PM"/> <input type="button" value="Close"/> <input type="button" value="Split"/>

- Use “Merge” button to collapse multiple open intervals into one, effectively removing breaks during the day.
- To remove a break, you can also adjust time intervals to overlap and then use “Validate” button to collapse two intervals into one.

**IMPORTANT:** Online Appointment Scheduler does not allow appointments to be booked outside of schedule business hours. Each available appointment, for the entire duration of it, has to be within schedule business hours. Online Appointment Scheduler does not allow appointments to span through breaks or end after-hours. For example, if schedule is configured with the service duration of 60 minutes and open on Mondays until 6:00 PM, the last available appointment time is 5:00 PM. If the schedule is configured with the service duration set to 15 minutes allows its last appointment at 5:45 PM.

## Personnel

Personnel-type schedule, by the nature of its name, requires at least one personnel record assigned to it. New Account Setup Helper automatically assigns the first personnel record that has been created during the previous configuration step to the first schedule. In the course of setting up your first schedule, you **should not** make any changes on this page:

General Settings Business Hours **Personnel** Notifications

Personnel Selection:  Required  Optional (not applicable in single personnel case)

Personnel Assigned to the Hair Care: Design Cut and Blow Dry \$45 Schedule

Senior Therapist Mary Johnson (Active)  
(optional)

< Previous Next >

Save changes and mark this configuration step completed  
 Discard changes, I will come back to this step later  
 Discard changes but mark this step completed anyway

Create Appointment Profile (Optional) Cancel Reset

When you, your staff or your customers book appointments on personnel-type schedule, newly created appointments reference both schedule (as a service) and a personnel record (as a person responsible for servicing the customer).

- **Personnel Selection** option defines if appointment creation pages should require customers to select a person with whom they would like to make an appointment or not. If personnel selection is set to be optional, Online Appointment Scheduler automatically selects service representative from the list of personnel linked to the schedule. This option does not have any effect if there is only one personnel record associated with the schedule, because in this case personnel selection is always required and predetermined:

Personnel Selection:  Required  Optional (not applicable in single personnel case)

- **Assigned Personnel** matrix allows you to assign staff members to the schedule. Since there is only one personnel record on your account so far and it is already pre-selected, you should not make any changes to the assigned personnel section:

Personnel Assigned to the Hair Care: Design Cut and Blow Dry \$45 Schedule

Senior Therapist Mary Johnson (Active)  
(optional)

**IMPORTANT:** Personnel-type schedule with no personnel assigned to it **can not** accept appointments and automatically becomes suspended. Suspended schedule is not shown to your customers and is effectively useless.

## Notifications

Online Appointment Scheduler has a very powerful feature that helps you and your staff to keep track of all appointments scheduled online – real-time appointment notification e-mails. The Notification tab of the Schedule Setup page allows you to specify recipients for the notifications to be sent out:

General	Settings	Business Hours	Personnel	Notifications
Appointment Notification Recipients				
<p><b>Hair Care: Design Cut and Blow Dry \$45</b> is a Personnel-Type schedule. By default, appointment notification e-mails will be sent to the personnel representative selected for an appointment. You may specify additional recipients from the list below:</p> <p><input type="checkbox"/> Mary Johnson &lt;mary@westernbeautyspa.com&gt; (Active) (optional)</p>				

There are three different types of appointment notification e-mails that are dispatched by Online Appointment Scheduler:

- *New appointment notifications* inform you and your staff about appointments that have been recently scheduled online. New appointment notification e-mails contain appointment confirmation number, schedule name, personnel name, location, date and time for an appointment as well as customer contact information.
- *Rescheduled appointment notifications* provide new dates and times for appointments that have been rescheduled. Rescheduled appointment notification e-mail references original appointment information in addition to the new date and time.
- *Cancelled appointment notifications* are sent for appointments that have been requested to be completely cancelled. Cancellation notifications reference original appointments.

By default, appointment notifications are sent to the service representative selected by the customer to perform service. Online Appointment Scheduler fetches the name and e-mail address for the notification to be sent to from the personnel record assigned to an appointment.

- **Appointment Notification Recipients: Staff** matrix allows you to specify additional people to get notified by e-mail about new appointments, rescheduled appointments and appointment cancellations. At this point, there should be only one business user on your account – account administrator. If administrator's e-mail address is different from the e-mail address on the personnel record assigned to the schedule and you would like your account administrator to receive appointment notifications on this schedule, select the checkbox next to his or her name:

<input checked="" type="checkbox"/> Mary Johnson <mary@westernbeautyspa.com> (Active) (optional)
---

- **Appointment Notifications: Customers** matrix allows optionally disable all customer-bound notifications for appointments made internally. By default, Online Appointment Scheduler sends e-mail notifications to your customers for all internal appointments.

## B. Capacity-type Schedule Setup

First Schedule Setup page is divided into five sections:

- General
- Settings
- Business Hours
- Personnel / Availability
- Notifications

By default, New Account Setup Center creates the first schedule to be of type “Personnel”. Since the purpose of this chapter is to describe capacity-type schedule setup, you have to change the schedule type as a part of the process. Once schedule type is changed, “Personnel” tab changes its name to “Availability”.

**IMPORTANT:** Please, **do not** attempt to change schedule type before you fill in schedule name and description fields. New Account Setup Helper requires the schedule to be named and described before allowing you to take any actions on it.

Each section is represented in its own tab. You can switch between tabs by clicking on the tab itself or by using “Next” and “Previous” buttons on the bottom of the page to go one step forward or one step back. The First Schedule Setup page is illustrated below:

**Create Schedule**

<b>General</b>	Settings	Business Hours	Personnel	Notifications												
Schedule Name: <input style="width: 90%;" type="text"/>																
Description: <input style="width: 90%; height: 40px;" type="text"/>																
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">Appointments:</th> <th style="width: 40%;">Internal</th> <th style="width: 45%;">External</th> </tr> </thead> <tbody> <tr> <td>Regular:</td> <td><input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed</td> <td><input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed</td> </tr> <tr> <td>Recurring:</td> <td><input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed</td> <td><input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed</td> </tr> <tr> <td>Rescheduling:</td> <td><input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed</td> <td><input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed</td> </tr> </tbody> </table>					Appointments:	Internal	External	Regular:	<input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed	<input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed	Recurring:	<input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed	<input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed	Rescheduling:	<input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed	<input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed
Appointments:	Internal	External														
Regular:	<input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed	<input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed														
Recurring:	<input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed	<input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed														
Rescheduling:	<input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed	<input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed														
Type: Personnel <span style="float: right; border: 1px solid black; padding: 2px 10px;">Change to Capacity</span>																
<span style="border: 1px solid black; padding: 5px 20px;">Next &gt;</span>																
<input checked="" type="radio"/> Save changes and mark this configuration step completed <input type="radio"/> Discard changes, I will come back to this step later <input type="radio"/> Discard changes but mark this step completed anyway																
<span style="border: 1px solid black; padding: 5px 20px; margin-right: 10px;">Create Custom Form (Optional)</span> <span style="border: 1px solid black; padding: 5px 20px; margin-right: 10px;">Cancel</span> <span style="border: 1px solid black; padding: 5px 20px;">Reset</span>																

## General

General schedule settings define how its service is identified and presented to your customers. This also includes appointment scheduling permissions and schedule type:

General	Settings	Business Hours	Personnel	Notifications
Schedule Name:	20 Minute Tanning Session			
Description:	One session is about equivalent to half a day in the sun. Our Wolff Tanning Systems feature special facial tanning lamps that help achieving a healthy glow without damaging your skin. Relax and take a nap while getting a tan!			
Appointments:	Internal	External		
Regular:	<input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed	<input checked="" type="radio"/> Allowed	<input type="radio"/> NOT Allowed	
Recurring:	<input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed	<input type="radio"/> Allowed	<input checked="" type="radio"/> NOT Allowed	
Rescheduling:	<input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed	<input type="radio"/> Allowed	<input checked="" type="radio"/> NOT Allowed	
Type:	Personnel	Change to Capacity		

First of all, fill out the “Schedule Name” and “Description” fields. Use the name of the service which the schedule represents as a schedule name. Put service description into the description field:

Schedule Name:	20 Minute Tanning Session
Description:	One session is about equivalent to half a day in the sun. Our Wolff Tanning Systems feature special facial tanning lamps that help achieving a healthy glow without damaging your skin. Relax and take a nap while getting a tan!

Schedule name is used as identification of service for both your customers making appointments using your Customer Appointment Scheduler, and your staff booking call-in appointments in Online Appointment Scheduler. If you are setting up schedule for a fixed price service, you may include the service fee into the schedule name for the reference.

Schedule description is only presented to your customers on your Customer Appointment Scheduler pages; it is not used inside Online Appointment Scheduler for the purpose of making appointments. Therefore, you should phrase it short but descriptive from the customer point of view.

Both schedule name and description should not include marketing pitches or any special offer details. Online Appointment Scheduler supports Direct Offer feature that is much more appropriate for this purpose. Since schedule name and description are included on appointment notification, confirmation and reminder e-mails, any future-tense verbs or intonations that indicate the customer is yet to book an appointment should be avoided.

There are two ways appointments can be made on a schedule:

- **Externally:** External appointments are made by your customers online using your Customer Appointment Scheduler.
- **Internally:** Internal appointments are made by you, your receptionist or members of your staff in Online Appointment Scheduler

Internal and external appointment settings can be configured independently, for example you can allow your staff to reschedule appointments while not allowing your customers to do it themselves (this is a default setting):

Appointments:	Internal	External
Regular:	<input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed	<input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed
Recurring:	<input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed	<input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed
Rescheduling:	<input checked="" type="radio"/> Allowed <input type="radio"/> NOT Allowed	<input type="radio"/> Allowed <input checked="" type="radio"/> NOT Allowed

- **Regular** appointment setting determines if appointments can be made at all on the schedule. By default, both internal and external scheduling is allowed. If you would like to use the schedule for internal appointments only, select “NOT Allowed” option under the “External” column. This will completely hide the service from customers browsing your online scheduling pages.
- **Recurring** option defines if standing or recurring appointments should be allowed on the schedule or not. This option is not enabled by default. If your customers sign up for recurring services, such as training session every week on Tuesdays for two months, you should enable recurring appointments by selecting “Allowed” in either “Internal”, “External” or both columns.
- **Rescheduling** allows you, your staff and your customers to change appointment date and time after appointment has been already made. It also allows your staff to update appointment information after the fact. By default, internal rescheduling is allowed while external is not. If you would like your customers to reschedule appointments without having to call your office, you should change the rescheduling setting to “Allowed” in the “External” column.

**IMPORTANT:** Schedule type is set to “Personnel” by default; it needs to be changed to “Capacity” in order to configure a capacity-type schedule. You should change the schedule type by clicking on the “Change to Capacity” button:

Type:	Personnel	<a href="#">Change to Capacity</a>
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After performing this action you should see “Capacity” title in the schedule type field:

Type:	Capacity	<a href="#">Change to Personnel</a>
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At the same time, “Personnel” Schedule Setup tab should change its name to “Availability”. Do not proceed to the “Settings” tab until you make sure that schedule type has been changed to “Capacity”.

## Settings

Appointment scheduling rules are configured in the settings tab of the First Schedule Setup Page:

General	Settings	Business Hours	Availability	Notifications
Concurrent Limit: <input type="text" value="5"/> appointments per customer				
Valid From: <input type="text"/> MM/DD/YYYY (optional)				
Valid To: <input type="text"/> MM/DD/YYYY (optional)				
Appointments: Internal External				
Reservation Deadline:		<input type="text" value="0"/> hour(s) <input type="button" value="v"/>	<input type="text" value="2"/> day(s) <input type="button" value="v"/>	
Rescheduling Deadline:		<input type="text" value="0"/> hour(s) <input type="button" value="v"/>	<input type="text" value="1"/> day(s) <input type="button" value="v"/>	
Cancellation Deadline:		<input type="text" value="0"/> hour(s) <input type="button" value="v"/>	<input type="text" value="1"/> day(s) <input type="button" value="v"/>	
Auto Confirm:		<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Auto Cancel:		<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Allow Appointment Delete:		<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Reservation Disclosure:		<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	

Compared to personnel-type schedule setup, “Settings” tab for the capacity-type schedule does not have “Appointment Interval” and “Service Duration” fields. Since capacity-type schedules are much more sophisticated in terms of appointment availability configuration, “Appointment Interval” and “Service Duration” settings are part of the “Availability” tab and not the “Settings” tab.

- Concurrent Limit** is a maximum number of upcoming appointments any given customer can have booked for the schedule at a time. Concurrent limit is a security feature that prevents dishonest customers to book your entire schedules by making repetitive appointments. If your customer audience is trusted or if a lot of your customers schedule recurrent appointments way in advance, you can increase this number to a greater value:

Concurrent Limit:	<input type="text" value="30"/>	appointments per customer
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- Valid From** and **Valid To** dates determine seasonal service availability conditions or exact dates for one-time event schedule. For example, if the service is to be discontinued on December 31, 2004, the “Valid to” date should be set accordingly:

Valid From:	<input type="text"/>	MM/DD/YYYY (optional)
Valid To:	<input type="text" value="12/31/2004"/>	MM/DD/YYYY (optional)

Valid schedule dates limit schedule availability to allow appointments made for the “Valid from” date and later, and before or on the “Valid to” date. “Valid from” and “Valid to” dates are inclusive and optional. These dates do not affect schedule visibility to your customers: for example, even if the “Valid from” date is still in the future your customers can see the schedule and make appointments for it within valid dates.

- **Reservation, Rescheduling and Cancellation Deadlines** define how much time in advance you allow for making an appointment, rescheduling an appointment and canceling an appointment respectively. Deadlines can be specified in hours, days or months. Minimum setting for each one of the active deadlines is one hour, if any deadline is set to 0 ('zero') than it is considered current. In other words, corresponding action is allowed on all future appointments with the 'zero' deadline, no matter how close the appointment time is to now. Deadlines can not be configured with negative values, as back-dated actions are not allowed by Online Appointment Scheduler.

For example, if you require your customers to keep an advance of at least 2 days before the appointment to book it, 12 hours to reschedule it and one day to cancel, while not requiring deadlines on internal scheduling, it you should set respective values as pictured below:

Appointments:	Internal	External
Reservation Deadline:	0 hour(s) ▾	2 day(s) ▾
Rescheduling Deadline:	0 hour(s) ▾	12 hour(s) ▾
Cancellation Deadline:	0 hour(s) ▾	1 day(s) ▾

Reservation, rescheduling and cancellation deadlines can be set separately for internal versus external appointments. This allows you, as in example above, to force your customers to obey deadlines while working with your Customer Appointment Scheduler, and keep your staff from deadline restrictions altogether.

**IMPORTANT:** All three types of deadlines are calculated in 24 hour clock and not your business hours clock. If you require time to catch up with new appointments and cancellations at the beginning of each day, you should set all deadlines to be at least 12 hours long.

**IMPORTANT:** If you plan to schedule appointments for the same day or the next day, you should not set the reservation deadline too high. Default reservation deadline setting (2 days) prevents you from scheduling appointments within 2 days from today. To be able to book appointments for the same day, it is recommended to set reservation deadline to 0 ('zero') hours, effectively disabling the deadline. The same rule applies to cancellation and rescheduling deadlines.

- **Auto Confirm** and **Auto Cancel** are two independent options that define the way new appointment requests and appointment cancellation requests are processed. By default, each new external appointment and each external cancellation requires manual confirmation by you or your staff, while same actions taken internally do not require separate confirmations. If you would like Online Appointment Scheduler automatically confirm each new external appointment instantly when it's made, change the "Auto Confirm" setting to "Yes". If same rule applies to cancellations, "Auto Cancel" can be also changed to "Yes":

Auto Confirm:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No
Auto Cancel:	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No

- **Allow Appointment Delete** option determines if 'Delete' action is allowed on appointments or not. It is not recommended to allow your customers to delete appointments themselves, though in most cases it is Ok for your staff members to do so. Default settings reflect indicate corresponding selections:

Allow Appointment Delete:  Yes  No

Yes  No

- **Reservation Disclosure** By default, the schedule is set up to present your customers with available appointment times only, while showing appointment times that were previously available to you and your staff. Reservation disclosure setting can be configured independently for internal and external scheduling.

Appointment times for which appointment reservations have been already made are hidden from customer's view if the reservation disclosure is configured to "No". If reservation disclosure is configured as 'Yes', all previously available appointment times will be shown on the 'Make Appointment' page as grayed-out (disabled) buttons.

If you would like to change default behavior of the schedule to configure it to show all possible appointment times including the ones which are already reserved, set reservation disclosure option to "Yes":

Reservation Disclosure:  Yes  No

Yes  No

In this case, reserved appointment times will be shown to your customers for information purposes only, exactly in the same way it is shown to your staff. Changing reservation disclosure does not affect schedule appointment reservation logic.

**IMPORTANT:** Enabling reservation disclosure option **does not** compromise integrity and privacy of your online appointment calendar since Online Appointment Scheduler does not allow your customers to double-book appointments or see other customers' names regardless of what reservation disclosure value is set to. Reservation disclosure setting applies to both external and internal appointment scheduling.

## Business Hours

Business Hours tab of the Schedule Setup defines weekly appointment availability hours for the schedule. By default, Account Setup Helper is using account business hours as a template for the schedule business hours:

General	Settings	Business Hours	Availability	Notifications
Week Day		Business Hours		
Sunday		Closed for Business <input type="button" value="Open"/>		
Monday		From: 08:00 AM	To: 06:00 PM	<input type="button" value="Close"/> <input type="button" value="Split"/>
Tuesday		From: 08:00 AM	To: 06:00 PM	<input type="button" value="Close"/> <input type="button" value="Split"/>
Wednesday		From: 08:00 AM	To: 06:00 PM	<input type="button" value="Close"/> <input type="button" value="Split"/>
Thursday		From: 08:00 AM	To: 06:00 PM	<input type="button" value="Close"/> <input type="button" value="Split"/>
Friday		From: 08:00 AM	To: 06:00 PM	<input type="button" value="Close"/> <input type="button" value="Split"/>
Saturday		From: 08:00 AM	To: 06:00 PM	<input type="button" value="Close"/> <input type="button" value="Split"/>
		<input type="button" value="Validate"/>	<input type="button" value="Switch to Arbitrary Minutes Mode"/>	

To change schedule business hours for a particular day:

- Use the “From:” pull-down list to select correct open time setting
- Use the “To:” pull-down list to select correct close time setting
- If your open or close times are not aligned with hour or half an hour, click on the “Switch to Arbitrary Minutes mode” button in order to enter times like 08:15 AM or 1:15 PM for Saturday:

Week Day	Business Hours		
Sunday	Closed for Business <input type="button" value="Open"/>		
Monday	From: 08:00 AM	To: 06:00 PM	<input type="button" value="Close"/> <input type="button" value="Split"/>
Tuesday	From: 08:00 AM	To: 06:00 PM	<input type="button" value="Close"/> <input type="button" value="Split"/>
Wednesday	From: 08:00 AM	To: 06:00 PM	<input type="button" value="Close"/> <input type="button" value="Split"/>
Thursday	From: 08:00 AM	To: 06:00 PM	<input type="button" value="Close"/> <input type="button" value="Split"/>
Friday	From: 08:00 AM	To: 06:00 PM	<input type="button" value="Close"/> <input type="button" value="Split"/>
Saturday	From: 08:15 AM	To: 01:15 PM	<input type="button" value="Close"/> <input type="button" value="Split"/>
	<input type="button" value="Validate"/>	<input type="button" value="Switch to Preset Minutes Mode"/>	

To set a day of the week to be “Closed”:

- Click on the “Close” button next to the work hours for a particular week day, for example, Monday. The result of this action should look as shown below:

Week Day	Business Hours
Sunday	Closed for Business <input type="button" value="Open"/>
Monday	Closed for Business <input type="button" value="Open"/>

- To re-open the week day marked as closed, click on the “Open” button next to the “Closed for Business” caption.

To setup a lunch break or multiple technical breaks during the day:

- Click on the “Split” button next to the business hours for a particular week day. The result of this action should look like the illustration below:

Week Day	Work Hours
Sunday <input type="button" value="Merge"/>	From: <input type="text" value="08:00 AM"/> To: <input type="text" value="01:00 PM"/> <input type="button" value="Off Work"/> <input type="button" value="Split"/>
	From: <input type="text" value="01:30 PM"/> To: <input type="text" value="06:00 PM"/> <input type="button" value="Off Work"/> <input type="button" value="Split"/>
Monday	From: <input type="text" value="08:00 AM"/> To: <input type="text" value="06:00 PM"/> <input type="button" value="Off Work"/> <input type="button" value="Split"/>

- Adjust time intervals to match your break times.
- Use “Split” button again to setup multiple breaks during the day

Week Day	Business Hours
Sunday	Closed for Business <input type="button" value="Open"/>
Monday <input type="button" value="Merge"/>	From: <input type="text" value="08:00 AM"/> To: <input type="text" value="01:00 PM"/> <input type="button" value="Close"/> <input type="button" value="Split"/>
	From: <input type="text" value="01:30 PM"/> To: <input type="text" value="06:00 PM"/> <input type="button" value="Close"/> <input type="button" value="Split"/>

- Use “Merge” button to collapse multiple open intervals into one, effectively removing breaks during the day.
- To remove a break, you can also adjust time intervals to overlap and then use “Validate” button to collapse two intervals into one.

**IMPORTANT:** Online Appointment Scheduler does not allow appointments to be booked outside of schedule business hours. Each available appointment, for the entire duration of it, has to be within schedule business hours. Online Appointment Scheduler does not allow appointments to span through breaks or end after-hours. For example, if schedule is configured with the service duration of 60 minutes and open on Mondays until 6:00 PM, the last available appointment time is 5:00 PM. If the schedule is configured with the service duration set to 15 minutes allows its last appointment at 5:45 PM.

Since capacity-type schedule can be used for seminars and classes that often happen after-hours, capacity-type schedule business hours are not limited to your regular hours of operation defined by your account business hours.

## Availability

Capacity-type schedule provides you with a very precise control over available appointment times, number of customers you can service at the same time, scheduling exceptions and day-by-day appointment availability. Capacity-type schedule defines available appointments via weekly time table:

General
Settings
Business Hours
Availability
Notifications

Appointment Interval:  minutes Apply to Time Table

Service Duration:  minutes Make it Flexible

Overlap:  Allowed  Prevented

Capacity:  customers per appointment time

Group Scheduling:  Enabled  Disabled (always disabled for schedules that allow overlap)

Time	Sun	Mon	Tue	Wed	Thu	Fri	Sat
08:00 AM		☑	☑	☑	☑	☑	
09:00 AM		☑	☑	☑	☑	☑	☑
10:00 AM		☑	☑	☑	☑	☑	☑
11:00 AM		☑	☑	☑	☑	☑	☑
12:00 PM		☑	☑	☑	☑	☑	☑
01:00 PM			☑	☑	☑	☑	☑
02:00 PM		☑	☑	☑	☑	☑	
03:00 PM		☑	☑	☑	☑	☑	
04:00 PM		☑	☑	☑	☑	☑	
05:00 PM		☑	☑	☑	☑	☑	

< Previous
Next >

Save changes and mark this configuration step completed

Discard changes, I will come back to this step later

Discard changes but mark this step completed anyway

Create Custom Form (Optional)
Cancel
Reset

Weekly time table is generated based on schedule business hours, appointment interval and service duration settings. Schedule business hours together with the service duration setting define outer limits for appointment availability. Appointment interval determines gaps between appointments within weekly time table.

**IMPORTANT:** Each time appointment interval, service duration or both are changed, it is necessary to update weekly time table to reflect new appointment interval and service duration settings by clicking on the “Apply to Time Table” button. This allows you to inspect new time table immediately and make further changes if necessary. If “Apply to Time Table” button is not used after appointment interval or service duration change, Schedule Setup page will perform update automatically when saving the schedule. However, this may result in unwanted changes. Visual inspection of the updated weekly time table is always recommended.

- **Appointment Interval** defines the period of time between beginnings of appointments. It is measured in minutes and by default is set to one hour. For example, if your customers come in every 15 minutes, appointment interval should be set accordingly – to 15 minutes:

Appointment Interval:	<input type="text" value="15"/> minutes	Apply to Time Table
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- **Service Duration** is the amount of time it takes you to perform the service. This is also the amount of time your customers should expect to spend for an appointment. By default, service duration is set to be the same as appointment interval at 60 minutes:

Appointment Interval:	<input type="text" value="60"/> minutes	Apply to Time Table
Service Duration:	<input type="text" value="60"/> minutes	Make it Flexible

Service duration can be the same, less than or greater than appointment interval – all three cases are significantly different in the way it affects appointment scheduling:

- **Appointment Interval is the same as Service Duration:** For example, both values are set to be 30 minutes:

Appointment Interval:	<input type="text" value="30"/> minutes	Apply to Time Table
Service Duration:	<input type="text" value="30"/> minutes	Make it Flexible

In this case, appointments start every thirty minutes and each appointment takes thirty minutes. There are no time gaps between appointments.

- **Appointment Interval is greater than Service Duration:** For example, appointment interval is set to 40 minutes while service duration is set to 30 minutes:

Appointment Interval:	<input type="text" value="40"/> minutes	Apply to Time Table
Service Duration:	<input type="text" value="30"/> minutes	Make it Flexible

In this case appointments start every 40 minutes, but it only takes half an hour to service the customer. As a result of this configuration, your customers expect to spend only 30 minutes on appointment while your staff has 10 minute gap between the end of an appointment and beginning of the next one. This gap can be used for the break, cleanup, etc.

- **Appointment Interval is less than Service Duration:** In most cases, this scenario is useful when appointment interval is much less than service duration and when minimizing unused staff time is essential. For example, if appointment interval is set to 15 minutes and service duration is set to 45 minutes:

Appointment Interval:	<input type="text" value="15"/> minutes	Apply to Time Table
Service Duration:	<input type="text" value="45"/> minutes	Make it Flexible

Appointments are available every 15 minutes but it takes 45 minutes to service the customer. In the case when appointment interval is less than service

duration, capacity-type schedule allows you to control appointment overbooking using the “Overlap” option:

- If “Overlap” option is set to “Prevented”, each booked appointment will take 3 available appointment slots from your appointment book to make sure there is no overbooking.
- If “Overlap” option is set to “Allowed”, each booked appointment will take one available appointment slot from your appointment book allowing two subsequent appointment slots to stay open. In this case, appointments can partially overlap.

Compared to the 45/45 minutes scenario, in 15/45 minutes setup your customers have more options on when to schedule an appointment, as appointments are available every 15 minutes; at the same time you are not risking 45 minute gap between appointments because the next customer can schedule right after, 15, 30 or 45 minutes later the end of the previous appointment.

Choosing the best match to your scheduling practices from the scenarios described above can be challenging at first. In most cases, it is recommended to start with the most simple case when appointment interval is the same as service duration and consider changing these settings only if at a later time you determine that appointment availability is not the same as you need it to be.

By default, service duration is a fixed setting - meaning that all appointments made for the schedule are expected to take same amount of time. However, if your service time varies based on customer preference or organizational arrangements, you can make service duration flexible to accommodate appointments of different durations. For example, if schedule is intended for both one-hour or two-hour coaching sessions, then it should use two separate service duration settings. If alternative service durations are enabled on the schedule, your customers and your staff are prompted to choose the length of an appointment at the time when they make one.

To enable service duration alternatives in a flexible format, click on the “Make it Flexible” button next to the service duration setting. The form will expand to accommodate additional fields for alternative service durations:

Service Duration:	Default:	<input type="text" value="45"/> minutes
	Alternative:	<input type="text"/> minutes (optional)
		<input type="button" value="More..."/> <input type="button" value="Clear All"/>

You can add as many alternative service durations as your service requires by entering alternative value and then clicking on the “More...” button to expand the list of alternative durations. Schedule Editor will automatically sort alternative service durations and remove duplicates. Here is an example of schedule setup that allows 15, 20, 45 minute, as well as one-hour appointments. In this example, 45 minute appointment duration is set as default:

Service Duration:	Default:	<input type="text" value="45"/>	minutes
	Alternative:	<input type="text" value="15"/>	minutes (optional)
		<input type="text" value="20"/>	minutes (optional)
		<input type="text" value="60"/>	minutes (optional)
		<input type="text" value=""/>	minutes (optional)
		<input type="button" value="More..."/>	<input type="button" value="Clear All"/>

To remove unwanted alternative service durations, simply clear form fields that list them. Schedule Editor will automatically update the list when you go to the next schedule configuration step.

To remove all alternative service duration settings and to revert back to the fixed service duration mode, click on the “Clear All” button. This action will remove all alternative durations from the schedule and will set default duration value to be the only one allowed by the schedule:

Service Duration:	<input type="text" value="45"/>	minutes	<input type="button" value="Make it Flexible"/>
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- **Overlap** option allows you to control overbooking in the case when appointment interval is set to be less than service duration. If overlap option is set to “Prevented” (default setting), no appointments booked for different times on the same schedule can overlap even partially. If it is set to “Allowed”, appointments are allowed to overlap partially:

Overlap:	<input checked="" type="radio"/> Allowed	<input type="radio"/> Prevented
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Overlap option has no effect on a schedule if appointment interval is less than, or equal to service duration since in this case no two appointments scheduled for different times can overlap.

- **Capacity** determines the number of appointments your schedule can accept at any particular appointment time. In other words, capacity is a maximum number of customers you can serve at the same time. By default, capacity is set to 1, meaning no double-booking is allowed (only one customer can make an appointment for any given time on the schedule time table). By no means the default value is preferred or recommended. If your business operations allow multiple customers to come in at the same time for the same service, then capacity setting should be set appropriately. For example, if the schedule is intended to manage appointments for a tanning salon with 8 tanning beds, then up to 8 customers should be allowed to book their tanning sessions at the same time to allow for maximum possible utilization of tanning equipment:

Capacity:	<input type="text" value="8"/>	customers per appointment time
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Similarly, if the schedule represents a seminar for 20 people, up to 20 participants should be allowed to sign up for any given date and time when the seminar is available:

Capacity:	<input type="text" value="20"/>	customers per appointment time
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Online Appointment Scheduler provides appointments to your customers on the “first come, first served” basis. In the example above, first 20 people who request participation

in the first available seminar will be granted their requests, while anyone beyond the limit of 20 will be asked to select different date and/or time for the seminar.

- **Group Scheduling** option allows a single customer to make an appointment for more than one person at a time, effectively taking more than one available appointment slot out of your appointment book. For example, rafting trip reservations are usually done in terms like “family-of-four” or “group-of-eight”. Setting group scheduling option to “Enabled” allows your customers to specify a number of people coming, such as “four” or “eight” in the rafting trip example:

Group Scheduling:  Enabled  Disabled

Every time an appointment is made for more than one person at a time, the schedule time slot availability is decreased by the number of customers linked to the appointment as a group. In order for group scheduling to work, schedule capacity should be set to a value more than 1.

Time table defines appointment availability using regular weekly time pattern. All appointment times within schedule business hours are pre-selected by default:

Time	Sun	Mon	Tue	Wed	Thu	Fri	Sat
08:00 AM		<input checked="" type="checkbox"/>					
09:00 AM		<input checked="" type="checkbox"/>					
10:00 AM		<input checked="" type="checkbox"/>					
11:00 AM		<input checked="" type="checkbox"/>					
12:00 PM		<input checked="" type="checkbox"/>					
01:00 PM			<input checked="" type="checkbox"/>				
02:00 PM		<input checked="" type="checkbox"/>					
03:00 PM		<input checked="" type="checkbox"/>					
04:00 PM		<input checked="" type="checkbox"/>					
05:00 PM		<input checked="" type="checkbox"/>					

- Checked (  ) items in the time table represent available appointment times, with the maximum number of customers determined by the capacity setting.
- Unchecked (  ) time table items define times for particular weekdays when no appointments are available.
- To restrict appointment availability to certain times on particular week days, uncheck selections corresponding to the day in time for which appointments are no available. For example, to introduce a technical break on Thursdays and Fridays at 12 o'clock noon and weekly staff meeting on Wednesdays at 8:00 AM uncheck the “12:00 PM” boxes for Tuesdays am Fridays as well as 8:00 AM for Wednesdays:

Time	Sun	Mon	Tue	Wed	Thu	Fri	Sat
08:00 AM		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
09:00 AM		<input checked="" type="checkbox"/>					
10:00 AM		<input checked="" type="checkbox"/>					
11:00 AM		<input checked="" type="checkbox"/>					
12:00 PM		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
01:00 PM			<input checked="" type="checkbox"/>				
02:00 PM		<input checked="" type="checkbox"/>					
03:00 PM		<input checked="" type="checkbox"/>					
04:00 PM		<input checked="" type="checkbox"/>					
05:00 PM		<input checked="" type="checkbox"/>					

- To introduce a single after-hours appointment on Tuesdays at 7:00 PM, go back to the “Business Hours” tab, extend business hours for Tuesdays till 8:00 PM, then return to the “Availability” tab and uncheck the 6:00 PM appointment time for Tuesdays. Leave 7:00 PM for Tuesdays checked:

Time	Sun	Mon	Tue	Wed	Thu	Fri	Sat
08:00 AM		<input checked="" type="checkbox"/>					
09:00 AM		<input checked="" type="checkbox"/>					
10:00 AM		<input checked="" type="checkbox"/>					
11:00 AM		<input checked="" type="checkbox"/>					
12:00 PM		<input checked="" type="checkbox"/>					
01:00 PM			<input checked="" type="checkbox"/>				
02:00 PM		<input checked="" type="checkbox"/>					
03:00 PM		<input checked="" type="checkbox"/>					
04:00 PM		<input checked="" type="checkbox"/>					
05:00 PM		<input checked="" type="checkbox"/>					
06:00 PM			<input type="checkbox"/>				
07:00 PM			<input checked="" type="checkbox"/>				

- To modify step of the time table grid, change the appointment interval value and click on “Apply to Time Table” button. This will re-create the time table. You can also use smaller appointment interval setting to vary time gaps between appointments in the mornings versus evenings or to space out your appointment times for a particular day.

For example, to accept appointments in a one hour interval during weekday mornings while allowing appointments every 30 minutes in the afternoons starting at 2:00 PM, change appointment interval to 30 minutes, apply changes to time table and uncheck undesired morning times:

Time	Sun	Mon	Tue	Wed	Thu	Fri	Sat
08:00 AM		<input checked="" type="checkbox"/>					
08:30 AM		<input type="checkbox"/>					
09:00 AM		<input checked="" type="checkbox"/>					
09:30 AM		<input type="checkbox"/>	<input checked="" type="checkbox"/>				
10:00 AM		<input checked="" type="checkbox"/>					
10:30 AM		<input type="checkbox"/>	<input checked="" type="checkbox"/>				
11:00 AM		<input checked="" type="checkbox"/>					
11:30 AM		<input type="checkbox"/>	<input checked="" type="checkbox"/>				
12:00 PM		<input checked="" type="checkbox"/>					
12:30 PM			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
01:00 PM			<input checked="" type="checkbox"/>				
01:30 PM		<input type="checkbox"/>					
02:00 PM		<input checked="" type="checkbox"/>					
02:30 PM		<input checked="" type="checkbox"/>					
03:00 PM		<input checked="" type="checkbox"/>					
03:30 PM		<input checked="" type="checkbox"/>					
04:00 PM		<input checked="" type="checkbox"/>					
04:30 PM		<input checked="" type="checkbox"/>					
05:00 PM		<input checked="" type="checkbox"/>					
05:30 PM			<input type="checkbox"/>				
06:00 PM			<input type="checkbox"/>				
06:30 PM			<input type="checkbox"/>				
07:00 PM			<input checked="" type="checkbox"/>				
07:30 PM							

Capacity-type schedule gives you ultimate control over available appointment times by automatically generating appointment time table templates based on schedule business hours, appointment interval and service duration settings, and allowing you to customize schedule time table by making manual time selections. To make most of the capacity-type scheduling capabilities, allow yourself enough time to try different settings.

## Notifications

Online Appointment Scheduler has a very powerful feature that helps you and your staff to keep track of all appointments scheduled online – real-time appointment notification e-mails. The Notification tab of the Schedule Setup page allows you to specify recipients for the notifications to be sent out:

General	Settings	Business Hours	Availability	Notifications
Appointment Notification Recipients				
<input type="checkbox"/> Mary Johnson <mary@westernbeautyspa.com> (Active) (optional)				

There are three different types of appointment notification e-mails that are dispatched by Online Appointment Scheduler:

- **New** appointment notifications inform you and your staff about appointments that have been recently scheduled online. New appointment notification e-mails contain appointment confirmation number, schedule name, personnel name, location, date and time for an appointment as well as customer contact information.
- **Rescheduled** appointment notifications provide new dates and times for appointments that have been rescheduled. Rescheduled appointment notification e-mail references original appointment information in addition to the new date and time.
- **Cancelled** appointment notifications are sent for appointments that have been requested to be completely cancelled. Cancellation notifications reference original appointments.

On the contrary to personnel-type schedules, capacity-type schedules do not have personnel records assigned to them. In order for your staff to receive e-mail notifications from capacity-type schedule, it is necessary to assign one or more account business users to be recipients for appointment notifications.

- **Appointment Notification Recipients** matrix allows you to specify authorized users of your account to get notified by e-mail about new appointments, rescheduled appointments and appointment cancellations. At this point, there should be only one business user on your account – account administrator. If you would like your account administrator to receive appointment notifications on this schedule, select the checkbox next to his or her name:

<input checked="" type="checkbox"/> Mary Johnson <mary@westernbeautyspa.com> (Active) (optional)
---

If you make no selection here, no appointment notifications will be dispatched on this particular schedule.

- **Appointment Notifications: Customers** matrix allows optionally disable all customer-bound notifications for appointments made internally. By default, Online Appointment Scheduler sends e-mail notifications to your customers for all internal appointments.

## Create Custom Form

Appointment scheduling pages in Online Appointment Scheduler and Customer Appointment Scheduler automatically collect customer name and contact information in accordance with your required information policy. In addition to those few basic fields you may also require your customers to fill out a custom form at the time they make appointments. Once a customer makes an appointment, you will be able to inspect customer's answers to specific questions you have defined on the custom form along with other appointment details.

**IMPORTANT:** Creating a custom form **is optional** since custom forms are not required in order for online appointment scheduling to work. If you do not require your customers to provide you with any information in addition to the ones defined by required information policy, you can skip the Custom Form Setup page by selecting the “Discard changes but mark this step completed anyway” option at the bottom of the page and proceeding to the next configuration step:

- Save changes and mark this configuration step completed
- Discard changes, I will come back to this step later
- Discard changes but mark this step completed anyway

You can always create custom form a later time in Account Setup Center.

First Custom Form Setup page is divided into three sections: Settings, Form Fields and Preview. Each section is represented in its own tab. You can switch between tabs by clicking on the tab itself or by using “Next” and “Previous” buttons on the bottom of the page to go one step forward or one step back:

**Create Custom Form (Optional)**

Settings
Form Fields
Preview

Profile Name:

Description:

**Empty Form: No form fields defined yet**

- Save changes and mark this configuration step completed
- Discard changes, I will come back to this step later
- Discard changes but mark this step completed anyway

## Settings

Custom Form Settings section is used to name and describe your custom appointment form as well as attach it to one or more schedules on your account:

Settings	Form Fields	Preview
Profile Name:	<input type="text" value="Hair Care Options"/>	
Description:	<input type="text" value="Please tell us about your hair, styling preferences and your favorite beauty products so we could serve you better."/>	
Schedule:	<input type="checkbox"/> Hair Care: Design Cut and Blow Dry \$45 (Active) (optional)	

Fill out the “Profile Name” and “Description” fields. Use short descriptive title that effectively summarizes the type of questions you require your customers to answer as a profile name. Address your customers to provide you with information in the description field:

Profile Name:	<input type="text" value="Hair Care Options"/>
Description:	<input type="text" value="Please tell us about your hair, styling preferences and your favorite beauty products so we could serve you better."/>

Profile name is used as identification of the appointment form for both your customers making appointments using your Customer Appointment Scheduler, and your staff booking call-in appointments in Online Appointment Scheduler. Profile name should not be phrased as a question itself.

Profile description is only presented to your customers on your Customer Appointment Scheduler pages; it is not used inside Online Appointment Scheduler for the purpose of making appointments. Therefore, you should phrase it short but descriptive from the customer point of view.

Both profile name and description should not include marketing pitches or any special offer details. Online Appointment Scheduler supports Direct Offer feature that is much more appropriate for this purpose.

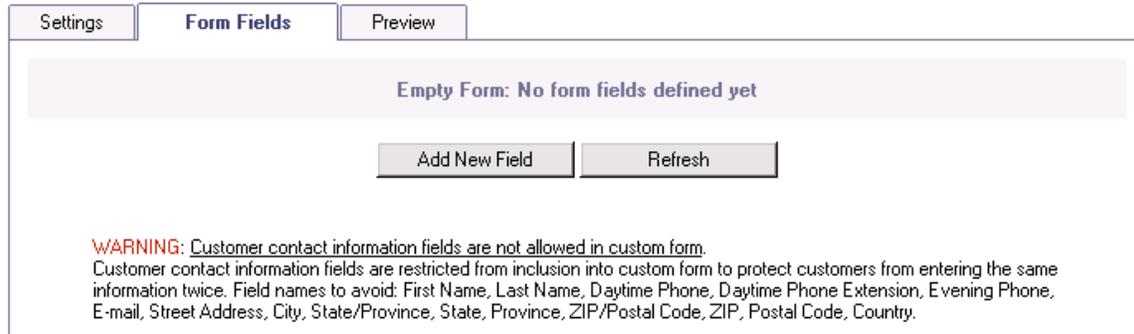
In order for custom form to be displayed as a part of your online scheduling page, it needs to be associated with one or more schedules on your account. At this point, there should be only one schedule available for association – the one that was created during the previous configuration step. To attach new custom form to the schedule, place the checkmark in the box next to the schedule name:

Schedule:	<input checked="" type="checkbox"/> Hair Care: Design Cut and Blow Dry \$45 (Active) (optional)
-----------	--

You can create your first custom form without any schedule associations. Such custom form will be stored on your account for future use.

## Form Fields

Appointment profile form fields define the custom form you require your customers to fill out each time they make an appointment for a schedule custom form is associated with. By default, Custom Form Setup page does not have any form fields defined:



Settings **Form Fields** Preview

Empty Form: No form fields defined yet

Add New Field Refresh

**WARNING:** Customer contact information fields are not allowed in custom form.  
Customer contact information fields are restricted from inclusion into custom form to protect customers from entering the same information twice. Field names to avoid: First Name, Last Name, Daytime Phone, Daytime Phone Extension, Evening Phone, E-mail, Street Address, City, State/Province, State, Province, ZIP/Postal Code, ZIP, Postal Code, Country.

- To create first appointment form field, click on the “Add New Field” button. Form field settings will appear in the form above the “Add New Field” button:

N	Field Name	Field Type	Actions								
Form Field 1: (Text Field)											
	Field Name:	<input type="text"/>									
	Field Type:	<table border="1"> <tr> <td><b>Text Field</b></td> <td>Text</td> <td>Yes/No</td> <td>Check Box</td> </tr> <tr> <td>Date</td> <td>Radio Group</td> <td>Choice List</td> <td>Pull-down</td> </tr> </table>		<b>Text Field</b>	Text	Yes/No	Check Box	Date	Radio Group	Choice List	Pull-down
<b>Text Field</b>	Text	Yes/No	Check Box								
Date	Radio Group	Choice List	Pull-down								
	Maximum Input Length:	<input type="text" value="10"/> characters									
	Visible Field Size:	<input type="text" value="10"/> characters									
	Answer Required:	<input type="radio"/> Yes <input checked="" type="radio"/> No									
		<input type="button" value="Done Editing Field"/> <input type="button" value="Delete Field"/>									

To setup the form field, type the field name, select field type, optionally adjust display length and size. If you require your customers to answer the form field question in order to make an appointment, then mark the form field as required; otherwise leave it as optional.

Different types of form fields have different settings. Text Field is the only type of form field that has “Maximum Input Length” and “Visible Field Size” options. Check Box can not be marked optional as it always produces an answer (YES or NO, checked or unchecked). Radio Group, Choice List and Pull-down form fields allow you to define a list of pre-set answer options to choose from. You should always choose the field type first before entering form field options, such as size, length or option list. Changing the type after making changes to form field settings will erase your input if the newly selected form field type does not support same strings as the old type.

For example, if the appointment form is intended to be used with the “Haircut” schedule used as an example before, the very first form field may be a “Hair Type”:

**Form Field 1: (Text Field)**

Field Name:

Field Type: **Text Field** | Text | Yes/No | Check Box  
 Date | Radio Group | Choice List | Pull-down

Maximum Input Length:  characters

Visible Field Size:  characters

Answer Required:  Yes  No

- To create additional form fields, also use the “Add New Field” button followed by customizing the form field settings row:

N	Field Name	Field Type	Actions
1	Hair Type	Text Field	<input type="button" value="Edit"/> <input type="button" value="Up"/> <input type="button" value="Down"/> <input type="button" value="Delete"/>
2	Colored Hair?	Yes/No	<input type="button" value="Edit"/> <input type="button" value="Up"/> <input type="button" value="Down"/> <input type="button" value="Delete"/>
3	Shampoo Brand	Text Field	<input type="button" value="Edit"/> <input type="button" value="Up"/> <input type="button" value="Down"/> <input type="button" value="Delete"/>
4	Preferred Styling Products	Radio Group	<input type="button" value="Edit"/> <input type="button" value="Up"/> <input type="button" value="Down"/> <input type="button" value="Delete"/>

- To modify form field settings or to change type of the field, click on the “Edit” button next to the form field to be changed. Forms fields table will expand with the editor for the field:

N	Field Name	Field Type	Actions
1	Hair Type	Text Field	<input type="button" value="Edit"/> <input type="button" value="Up"/> <input type="button" value="Down"/> <input type="button" value="Delete"/>
<div style="border: 1px solid #ccc; padding: 5px;"> <p><b>Form Field 2: Colored Hair? (Yes/No)</b></p> <p>Field Name: <input type="text" value="Colored Hair?"/></p> <p>Field Type: Text Field   Text   <b>Yes/No</b>   Check Box                  Date   Radio Group   Choice List   Pull-down</p> <p>Answer Required: <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p style="text-align: center;"> <input type="button" value="Done Editing Field"/> <input type="button" value="Delete Field"/> </p> </div>			
3	Shampoo Brand	Text Field	<input type="button" value="Edit"/> <input type="button" value="Up"/> <input type="button" value="Down"/> <input type="button" value="Delete"/>
4	Preferred Styling Products	Radio Group	<input type="button" value="Edit"/> <input type="button" value="Up"/> <input type="button" value="Down"/> <input type="button" value="Delete"/>
5	Comments	Text Field	<input type="button" value="Edit"/> <input type="button" value="Up"/> <input type="button" value="Down"/> <input type="button" value="Delete"/>

- To change order in which form fields appear on the appointment form or to delete a form field, use “Up”, “Down” and “Delete” buttons next to the form field to be moved or permanently deleted.

N	Field Name	Field Type	Actions
1	Hair Type	Text Field	<input type="button" value="Edit"/> <input type="button" value="Up"/> <input type="button" value="Down"/> <input type="button" value="Delete"/>
2	Colored Hair?	Yes/No	<input type="button" value="Edit"/> <input type="button" value="Up"/> <input type="button" value="Down"/> <input type="button" value="Delete"/>
3	Shampoo Brand	Text Field	<input type="button" value="Edit"/> <input type="button" value="Up"/> <input type="button" value="Down"/> <input type="button" value="Delete"/>
4	Preferred Styling Products	Radio Group	<input type="button" value="Edit"/> <input type="button" value="Up"/> <input type="button" value="Down"/> <input type="button" value="Delete"/>

There are eight different types of form fields that can be used on appointment form:

- Text Field** is a one-line text input box. Its “length” defines the maximum number of characters that are allowed to be typed in to answer the question, while “Size” determines visible horizontal size of the form field on the computer screen measured in characters. If the “Required” option on the form field is checked, text field form field does not allow itself to be left empty:

*Definition:*

**Form Field 1: Hair Type (Text Field)**

Field Name:

Field Type:

Maximum Input Length:  characters

Visible Field Size:  characters

Answer Required:  Yes  No

*Preview:*

Hair Type:

If form field length is greater than form field size, the form field will be scrollable.

- **Text** is a multi-line text input box. Compared to text field form field, text form field can accept longer answers. The size of the text form field is pre-defined and it does not allow more than 250 characters to be typed into it. “Length” and “Size” settings are not applicable to text form fields. If the “Required” option on the form field is checked, text form field does requires input to be provided:

*Definition:*

Form Field 5: Comments (Text)			
Field Name:	<input type="text" value="Comments"/>		
Field Type:	<input type="button" value="Text Field"/>	<input checked="" type="button" value="Text"/>	<input type="button" value="Yes/No"/>
	<input type="button" value="Date"/>	<input type="button" value="Radio Group"/>	<input type="button" value="Choice List"/>
Answer Required:	<input type="radio"/> Yes <input checked="" type="radio"/> No		
<input type="button" value="Done Editing Field"/> <input type="button" value="Delete Field"/>			

*Preview:*

Comments:	<div style="border: 1px solid gray; padding: 5px; min-height: 40px;">Text</div> <div style="text-align: right; font-size: small;">(optional)</div>
-----------	--

If input text contains a combination of long text and new lines, it allows itself to be scrolled vertically. Long sentences are wrapped to fit inside the text form field.

- **Yes/No** is a set of two radio buttons, labeled “Yes” and “No”. It can be answered as either “yes” or “no”, or intentionally be left blank to indicate “no answer”. If the “Required” option on the form field is checked, Yes/No form field does not allow empty “no-answer” selection. “Length” and “Size” settings are not applicable to Yes/No form fields:

*Definition:*

Form Field 2: Colored Hair? (Yes/No)			
Field Name:	<input type="text" value="Colored Hair?"/>		
Field Type:	<input type="button" value="Text Field"/>	<input type="button" value="Text"/>	<input checked="" type="button" value="Yes/No"/>
	<input type="button" value="Date"/>	<input type="button" value="Radio Group"/>	<input type="button" value="Choice List"/>
Answer Required:	<input type="radio"/> Yes <input checked="" type="radio"/> No		
<input type="button" value="Done Editing Field"/> <input type="button" value="Delete Field"/>			

*Preview:*

Colored Hair?:	<input checked="" type="radio"/> Yes <input type="radio"/> No (optional)
----------------	--

- **Check Box** is a box that can be checked to answer “yes” or left blank to answer “no”. Check box form field is very similar in its functionality to the Yes/No form field, except it is always required, because unchecked state of it is treated as the “no” answer. “Length”, “Size” and “Required” settings are not applicable to check box form fields:

*Definition:*

Form Field 2: Colored Hair? (Check Box)				
Field Name:	Colored Hair?			
Field Type:	Text Field	Text	Yes/No	<b>Check Box</b>
	Date	Radio Group	Choice List	Pull-down
<input type="button" value="Done Editing Field"/> <input type="button" value="Delete Field"/>				

*Preview:*

Colored Hair?:	<input checked="" type="checkbox"/>
----------------	-------------------------------------

- **Date** is a variation of the text field that requires MM/DD/YYYY formatted date as input. If the “Required” option on the form field is checked, date form field does requires date to be typed in. “Length” and “Size” settings are not applicable to date form fields:

*Definition:*

Form Field 6: Date of Last Visit (Date)				
Field Name:	Date of Last Visit			
Field Type:	Text Field	Text	Yes/No	Check Box
	<b>Date</b>	Radio Group	Choice List	Pull-down
Answer Required:	<input type="radio"/> Yes <input checked="" type="radio"/> No			
<input type="button" value="Done Editing Field"/> <input type="button" value="Delete Field"/>				

*Preview:*

Date of Last Visit:	<input type="text" value="01/01/2001"/>	MM/DD/YYYY (optional)
---------------------	---	-----------------------

- **Radio Group** is a list of options to choose from displayed as group of text strings with radio buttons next to them. As a choice group form field, radio group requires at least two answer options to be defined:

*Definition:*

Form Field 4: Preferred Styling Products (Radio Group)	
Field Name:	Preferred Styling Products
Field Type:	Text Field    Text    Yes/No    Check Box
	Date <b>Radio Group</b> Choice List    Pull-down
Answer Required:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Options List:	1    Neutrogena    Delete
	2    Estee Lauder    Delete
	3    Yves Rocher    Delete
	4    Other    Delete
	Add Option    Delete All Options
Done Editing Field    Delete Field	

*Preview:*

Preferred Styling Products:	<input checked="" type="radio"/> Neutrogena <input type="radio"/> Estee Lauder <input type="radio"/> Yves Rocher <input type="radio"/> Other
-----------------------------	---

- **Choice List** is a list of options to choose from displayed in a box, with each selection marked by highlighting the option. As a choice group form field, choice list field requires at least two answer options to be defined:

*Definition:*

Form Field 7: Professional Experience (Pull-down)

Field Name: Professional Experience

Field Type:

Answer Required:  Yes  No

Options List:

1	No prior professional experience	Delete
2	1-3 Years verifiable experience	Delete
3	4-10 Years verifiable experience	Delete
4	Previously self-employed, references available	Delete

*Preview:*

Education Level Completed:

High School Diploma or GED  
 Some college  
 College Degree - Associate  
 College Degree - Bachelor  
 College Degree - Master

- **Pull-down** is a classic choice list with pre-defined answer options available for selection when the field is clicked on. As a choice group form field, pull-down form field requires at least two answer options to be defined:

*Definition:*

Form Field 7: Sex (Pull-down)

Field Name: Sex

Field Type:

Answer Required:  Yes  No

Options List:

1	Male	Delete
2	Female	Delete

*Preview:*

Sex:

## Preview

Appointment profile preview allow you to visually inspect your appointment form. No editing is allowed in the custom form preview section:

**Create Custom Form (Optional)**

Settings

Form Fields

**Preview**

Form Preview

Hair Type:	<input type="text" value="Text Field"/>
Hair Color:	<input type="text" value="Text Field"/> (optional)
Colored Hair?:	<input checked="" type="checkbox"/>
Referred to us by:	<input type="text" value=""/> ▼
Shampoo Brand:	<input type="text" value="Text Field"/> (optional)
Comments:	<div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;">Text</div> (optional)
Date of Last Visit:	<input type="text" value="01/01/2001"/> MM/DD/YYYY (optional)
Preferred Styling Products:	<input type="radio"/> Neutrogena <input type="radio"/> L'Oreal <input type="radio"/> Yves Rocher <input type="radio"/> Matrix <input type="radio"/> Estee Lauder <input type="radio"/> CHANEL <input type="radio"/> Other (optional)
Education Level Completed:	<div style="border: 1px solid #ccc; padding: 2px;">                     High School Diploma or GED ▲                      Some college                      College Degree - Associate                      College Degree - Bachelor                      College Degree - Master ▼                 </div>

Save changes and mark this configuration step completed  
 Discard changes, I will come back to this step later  
 Discard changes but mark this step completed anyway

Create Service Location (Optional)

Cancel

Reset

## Create Service Location

Service Location is a physical location where services are offered at. It can be main office, satellite office, remote station, corporate client site or just about any other place that has its own business hours and appointment books.

**IMPORTANT:** Creating a service location **is optional**. If your business has only one physical location, you **should skip** the Service Location Setup page by selecting the “Discard changes but mark this step completed anyway” option at the bottom of the page and proceeding to the next configuration step:

- Save changes and mark this configuration step completed
- Discard changes, I will come back to this step later
- Discard changes but mark this step completed anyway

You can always create additional service locations in Account Setup Center.

First Service Location Setup page is divided into four sections:

- Location
- Business Hours
- Closed days
- Assignments

Each section is represented in its own tab. You can switch between tabs by clicking on the tab itself or by using “Next” and “Previous” buttons on the bottom of the page to go one step forward or one step back:

**Create Service Location (Optional)**

Location	Business Hours	Closed Days	Assignments
<p>Location Name: <input style="width: 90%;" type="text"/></p> <p>Description: <input style="width: 90%; height: 40px;" type="text"/></p> <p>Address: <input style="width: 90%;" type="text"/>  <input style="width: 90%;" type="text"/> , <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/>            United States <input style="width: 20px;" type="text"/> (optional)</p> <p>Time Zone: <input style="width: 90%;" type="text"/> (optional)</p> <p>Capacity: Unlimited <input style="width: 150px;" type="button" value="Make Limited"/></p>			
<input style="width: 100px;" type="button" value="Next &gt;"/>			
<input checked="" type="radio"/> Save changes and mark this configuration step completed <input type="radio"/> Discard changes, I will come back to this step later <input type="radio"/> Discard changes but mark this step completed anyway			
<input style="width: 150px;" type="button" value="Create Direct Offer (Optional)"/>		<input style="width: 100px;" type="button" value="Cancel"/>	<input style="width: 100px;" type="button" value="Reset"/>

## Location

Location tab of the Service Location Setup page is a place to identify, describe and classify your service location:

Location	Business Hours	Closed Days	Assignments
Location Name:	Village Center Plaza Salon		
Description:	Located in the Village Center Plaza, on the corner of 3rd and Main. Easy access from US-278 and County Line Rd. Across the street from SEARS Home Center.		
Address:	301 Main St., Suite #102		
	Hometown	CO	80763
	United States	(optional)	
Time Zone:	(optional)		
Capacity:	Unlimited	Make Limited	

- **Location Name** is a commonly used name for the office, station or shop represented by the service location:

Location Name:	Village Center Plaza Salon
----------------	----------------------------

- **Description** is presented to your customers in order to provide more details about the location where services are being offered. You can also use description field to provide directions to the service location, or reference local landmarks that make finding the place easier:

Description:	Located in the Village Center Plaza, on the corner of 3rd and Main. Easy access from US-278 and County Line Rd. Across the street from SEARS Home Center.
--------------	---

You should not include any information related to special promotions and discounts into description. It is strongly recommended to use Direct Offers for this particular purpose. You also should not include any information about services offered at the particular service location, schedule descriptions should be used for that purpose instead.

- **Address** form can be used together with the service location description to help customers finding their way to your office. Service location address is optional. If physical address of the service location matches your account address, there is no need to duplicate it. Your account address is used for any service location what does not specify its own. If location address is different from the account address, enter it in the address form:

Address:	301 Main St., Suite #102		
	Hometown	CO	80763
	United States	(optional)	

- **Time Zone** should be specified if the service location is not in the same time zone as your main office. If your account time zone matches both your main office and the service location, there is no need to specify time zone here. Your account time zone is used for any service location what does not specify its own. If the service location's time zone is different from the account time zone, it should be specified in the time zone field:

Time Zone:  (optional)

Online Appointment Scheduler uses time zone information to calculate appointment reservation, re-scheduling and cancellation deadlines. For schedules which are not associated with any particular service locations or if corresponding service locations do not have time zones specified, account time zone is used. For schedules that are assigned to service locations with their own time zones service location time zone is used for deadline calculation.

- **Capacity** determines the maximum number of customers that can be serviced at a particular location at any given time simultaneously. By default, service location's capacity is set to "Unlimited". In most common scheduling scenarios, schedule's capacity setting is quite sufficient to limit the number of customers served by the schedule. However, if service location has customer limitations on its own, service location capacity setting can be used together with the schedule capacity. For example, if the service location represents auto-detailing service with 4 bays capable of taking no more than 4 vehicles at a time, regardless of types of services performed at such location its capacity should be set to 4. This will prevent overbooking with Online Appointment Scheduler making sure no more than 4 customers can have their cars in the shop at any given time.

To set service location's capacity, click on the "Make Limited" button next to the "Unlimited" title in the capacity row:

Capacity: Unlimited

Then, change the default value of "1" to desired capacity:

Capacity:  customers at a time

To revert capacity setting to the original "Unlimited" setting, simply click on the "Make Unlimited" button next to the capacity input field.

**IMPORTANT:** Capacity option sometimes can make service location useful even if all of your services are offered at the main office and there are no other locations separate from the main office. By taking advantage of service location's capacity setting, you can use service location to enforce customer volume limitations if such resource restrictions exist in your business. For example, in a small doctor's office with only two examination rooms available, single service location can be used to make sure no more than two patients can book appointments for the same time regardless of the schedule they are making their appointments for.

## Business Hours

Service location is allowed to have business hours different from your corporate business hours specified on the account level. This is very useful when you have multiple service locations on your account that do not match each other in terms of weekly service availability. For example, massage therapy can perform chair massages at three different corporate client locations during the week; Mondays and Wednesdays at the Client A site, Tuesdays and Thursdays at Client B site and Fridays at Client C site. This scheduling scenario can be easily implemented using three service locations with only two days marked open per each location. By default, Account Setup Helper is using account business hours as a template for the service location business hours:

Location	Business Hours	Closed Days	Assignments																																								
	<table border="1"> <thead> <tr> <th>Week Day</th> <th colspan="2">Business Hours</th> <th colspan="2"></th> </tr> </thead> <tbody> <tr> <td>Sunday</td> <td colspan="2">Closed for Business</td> <td colspan="2"><input type="button" value="Open"/></td> </tr> <tr> <td>Monday</td> <td>From: 08:00 AM</td> <td>To: 06:00 PM</td> <td><input type="button" value="Close"/></td> <td><input type="button" value="Split"/></td> </tr> <tr> <td>Tuesday</td> <td>From: 08:00 AM</td> <td>To: 06:00 PM</td> <td><input type="button" value="Close"/></td> <td><input type="button" value="Split"/></td> </tr> <tr> <td>Wednesday</td> <td>From: 08:00 AM</td> <td>To: 06:00 PM</td> <td><input type="button" value="Close"/></td> <td><input type="button" value="Split"/></td> </tr> <tr> <td>Thursday</td> <td>From: 08:00 AM</td> <td>To: 06:00 PM</td> <td><input type="button" value="Close"/></td> <td><input type="button" value="Split"/></td> </tr> <tr> <td>Friday</td> <td>From: 08:00 AM</td> <td>To: 06:00 PM</td> <td><input type="button" value="Close"/></td> <td><input type="button" value="Split"/></td> </tr> <tr> <td>Saturday</td> <td>From: 08:00 AM</td> <td>To: 02:00 PM</td> <td><input type="button" value="Close"/></td> <td><input type="button" value="Split"/></td> </tr> </tbody> </table>	Week Day	Business Hours				Sunday	Closed for Business		<input type="button" value="Open"/>		Monday	From: 08:00 AM	To: 06:00 PM	<input type="button" value="Close"/>	<input type="button" value="Split"/>	Tuesday	From: 08:00 AM	To: 06:00 PM	<input type="button" value="Close"/>	<input type="button" value="Split"/>	Wednesday	From: 08:00 AM	To: 06:00 PM	<input type="button" value="Close"/>	<input type="button" value="Split"/>	Thursday	From: 08:00 AM	To: 06:00 PM	<input type="button" value="Close"/>	<input type="button" value="Split"/>	Friday	From: 08:00 AM	To: 06:00 PM	<input type="button" value="Close"/>	<input type="button" value="Split"/>	Saturday	From: 08:00 AM	To: 02:00 PM	<input type="button" value="Close"/>	<input type="button" value="Split"/>		
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		<input type="button" value="Validate"/>	<input type="button" value="Switch to Arbitrary Minutes Mode"/>																																								

To change schedule business hours for a particular day:

- Use the “From:” pull-down list to select correct open time setting
- Use the “To:” pull-down list to select correct close time setting
- If your open or close times are not aligned with hour or half an hour, click on the “Switch to Arbitrary Minutes mode” button in order to enter times like 08:15 AM or 1:15 PM for Saturday:

Week Day	Business Hours			
Sunday	Closed for Business		<input type="button" value="Open"/>	
Monday	From: 08:00 AM	To: 06:00 PM	<input type="button" value="Close"/>	<input type="button" value="Split"/>
Tuesday	From: 08:00 AM	To: 06:00 PM	<input type="button" value="Close"/>	<input type="button" value="Split"/>
Wednesday	From: 08:00 AM	To: 06:00 PM	<input type="button" value="Close"/>	<input type="button" value="Split"/>
Thursday	From: 08:00 AM	To: 06:00 PM	<input type="button" value="Close"/>	<input type="button" value="Split"/>
Friday	From: 08:00 AM	To: 06:00 PM	<input type="button" value="Close"/>	<input type="button" value="Split"/>
Saturday	From: 08:15 AM	To: 01:15 PM	<input type="button" value="Close"/>	<input type="button" value="Split"/>

To set a day of the week to be “Closed”:

- Click on the “Close” button next to the work hours for a particular week day, for example, Monday. The result of this action should look as shown below:

Week Day	Business Hours
Sunday	Closed for Business <input type="button" value="Open"/>
Monday	Closed for Business <input type="button" value="Open"/>

- To re-open the week day marked as closed, click on the “Open” button next to the “Closed for Business” caption.

To setup a lunch break or multiple technical breaks during the day:

- Click on the “Split” button next to the business hours for a particular week day. The result of this action should look like the illustration below:

Week Day	Work Hours
Sunday <input type="button" value="Merge"/>	From: <input type="text" value="08:00 AM"/> To: <input type="text" value="01:00 PM"/> <input type="button" value="Off Work"/> <input type="button" value="Split"/>
	From: <input type="text" value="01:30 PM"/> To: <input type="text" value="06:00 PM"/> <input type="button" value="Off Work"/> <input type="button" value="Split"/>
Monday	From: <input type="text" value="08:00 AM"/> To: <input type="text" value="06:00 PM"/> <input type="button" value="Off Work"/> <input type="button" value="Split"/>

- Adjust time intervals to match your break times.
- Use “Split” button again to setup multiple breaks during the day

Week Day	Business Hours
Sunday	Closed for Business <input type="button" value="Open"/>
Monday <input type="button" value="Merge"/>	From: <input type="text" value="08:00 AM"/> To: <input type="text" value="01:00 PM"/> <input type="button" value="Close"/> <input type="button" value="Split"/>
	From: <input type="text" value="01:30 PM"/> To: <input type="text" value="06:00 PM"/> <input type="button" value="Close"/> <input type="button" value="Split"/>

- Use “Merge” button to collapse multiple open intervals into one, effectively removing breaks during the day.
- To remove a break, you can also adjust time intervals to overlap and then use “Validate” button to collapse two intervals into one.

**IMPORTANT:** Service location business hours do not extend business hours defined on the schedule or personnel level. Online Appointment Scheduler does not allow appointments to be booked outside of service location business hours on each schedule associated with the service location in question. Each available appointment, for the entire duration of it, has to be within both schedule business hours and service location business hours. Online Appointment Scheduler does not allow appointments to span through breaks or end after-hours either on the schedule clock or service location clock. For example if there is a 60 minute schedule that is open until 6:00 PM on Tuesdays, and this schedule is linked to the service location that is open until only 4:00 PM on Tuesdays, the last available appointment on Tuesdays will be at 3:00 PM.

**IMPORTANT:** Online Appointment Scheduler maintains service location business hours independently from the schedule business hours and personnel work hours. Every time business

hours are extended, appropriate changes have to be applied on the account level as well as to every schedule, every personnel record and every service location on the account.

## Closed Days

In addition to company holidays and personnel vacations service location can define local holidays, inspection days and other calendar days when it is closed for business as “Closed Days”.

In addition to the schedule with service location business hours correlation, each schedule that is linked to the service location is subject to appointment availability limitations imposed by the service location closed days. On such schedules, no appointments are available when the corresponding service location is closed.

You should not use service location’s closed days to configure:

- **Company Business Holidays:** General business holidays are already set as account holidays in the second step of account configuration. Setting up the same holidays on the service location level is redundant and not needed. Online Appointment Scheduler automatically applies all account business holidays to service locations.
- **Personnel Vacations and Days Off:** Personnel vacations and days off should be configured as a part of personnel record setup.

By default, Service Location Setup page does not have any closed days defined:

The screenshot shows a web interface with four tabs: 'Location', 'Business Hours', 'Closed Days', and 'Assignments'. The 'Closed Days' tab is active. Below the tabs is a form titled 'Add New Closed Day'. The form contains a 'Date:' label followed by a text input field and the placeholder 'MM/DD/YYYY'. Below the input field are four radio button options: 'On specified date only', 'Same day of the week every week starting on specified date', 'Same day of the month every month starting on specified date', and 'Same date every year starting on specified date'. At the bottom of the form is an 'Add' button.

To add a one-time closed day:

- Enter a date in the “Date” field, for example “10/13/2003”.
- Select “On specified date only” option
- Click “Add” button:

Add New Closed Day	
Date:	<input type="text" value="10/13/2003"/> MWDD/YYYY
	<input checked="" type="radio"/> On specified date only <input type="radio"/> Same day of the week every week starting on specified date <input type="radio"/> Same day of the month every month starting on specified date <input type="radio"/> Same date every year starting on specified date
<input type="button" value="Add"/>	

To add repetitive closed day:

- Enter a first observed date in the “Date” field, for example “09/01/2003”
- Select one of the “Same day...” or “Same date...” options, for example “Same day every week starting on specified date”
- Click “Add” button:

Add New Closed Day	
Date:	<input type="text" value="09/01/2003"/> MWDD/YYYY
	<input type="radio"/> On specified date only <input type="radio"/> Same day of the week every week starting on specified date <input type="radio"/> Same day of the month every month starting on specified date <input checked="" type="radio"/> Same date every year starting on specified date
<input type="button" value="Add"/>	

Closed days are being added to the table on the top of the page. To remove the closed day from the list, click on the “Delete” button next to it. To make changes to the closed day, delete it first and re-add the closed day to the list using correct start date and repetition setting:

Location	Business Hours	Closed Days	Assignments
<b>Closed Days</b>			
On September 01 every year since 2003			<input type="button" value="Delete"/>
On October 13, 2003 (Monday)			<input type="button" value="Delete"/>
<b>Add New Closed Day</b>			
Date:		<input type="text"/>	MWDD/YYYY
		<input type="radio"/> On specified date only <input type="radio"/> Same day of the week every week starting on specified date <input type="radio"/> Same day of the month every month starting on specified date <input type="radio"/> Same date every year starting on specified date	
<input type="button" value="Add"/>			

## Assignments

In order for service location to participate in appointment scheduling it has to be assigned to schedules and, if needed, to personnel records. Service location with no assignments is considered standalone and does not influence appointment scheduling process in any respect. Service location assignments define services and staff available at the particular location.

By default, service location is not assigned to any schedules or personnel records:

Location	Business Hours	Closed Days	Assignments
<b>Assigned to Schedules</b>			
<input type="checkbox"/> Hair Care: Design Cut and Blow Dry \$45 (Active) (optional)			
<b>Assigned to Personnel</b>			
<input type="checkbox"/> Senior Therapist Mary Johnson (Active) (optional)			

Service Location Setup page polls the account to get a list of all schedules and personnel available to be assigned to the service location. At this point, there should be only one schedule and only one personnel record on the account – those were created during previous account setup steps.

- **Assigned to Schedules** matrix allows you to associate schedules with the service location. Assignment determines that the service represented by schedule is available at the service location. To assign schedule to the service location, click on the checkbox next to the schedule name to select it as shown below:

<b>Assigned to Schedules</b>
<input checked="" type="checkbox"/> Hair Care: Design Cut and Blow Dry \$45 (Active) (optional)

- **Assigned to Personnel** matrix allows you to associate personnel records with the service location. Assignment determines that the staff member represented by personnel record works at the service location. To assign personnel record to the service location, click on the checkbox next to the person's name to select it:

<b>Assigned to Personnel</b>
<input checked="" type="checkbox"/> Senior Therapist Mary Johnson (Active) (optional)

## Create Direct Offer

Direct Offer is Online Appointment Scheduler's term for "electronic coupon". It allows you to publish promotions and discounts online thus encouraging your customers to make appointments with you online. Direct Offer can be used by multiple schedules.

**IMPORTANT:** Direct Offer is **optional**; it does not define any scheduling rules on its own. If you do not plan to present your customers with online discounts or promotions, you **should skip** the Direct Offer Setup page by selecting the "Discard changes but mark this step completed anyway" option at the bottom of the page and proceeding to the next configuration step:

- Save changes and mark this configuration step completed
- Discard changes, I will come back to this step later
- Discard changes but mark this step completed anyway

You can always create Direct Offers in Account Setup Center.

First Direct Offer Setup page is divided into two sections:

- Settings
- Preview

Each section is represented in its own tab. You can switch between tabs by clicking on the tab itself or by using "Next" and "Previous" buttons on the bottom of the page to go one step forward or one step back:

**Create Direct Offer (Optional)**

Settings
Preview

Direct Offer Name:	<input style="width: 95%;" type="text"/>
Description:	<div style="border: 1px solid #ccc; height: 40px; width: 95%;"></div>
Code:	<input style="width: 80%;" type="text"/>
Valid From:	<input style="width: 80%;" type="text"/> MM/DD/YYYY
Valid To:	<input style="width: 80%;" type="text"/> MM/DD/YYYY
Schedule:	<input type="checkbox"/> Hair Care: Design Cut and Blow Dry \$45 (Active) (optional)

- Save changes and mark this configuration step completed
- Discard changes, I will come back to this step later
- Discard changes but mark this step completed anyway

Configure Business Holidays

Cancel

Reset

## Settings

Settings tab of the Direct Offer Setup page is used to name, describe, configure and assign new Direct Offer:

Settings	Preview
Direct Offer Name:	Hair Care: First Visit Special
Description:	Receive a FREE Neutrogena Shampoo Kit with your first visit to our salon booked online! (Limit one per customer. Can not be combined with any other offer.)
Code:	FRNEU
Valid From:	01/01/2002 MM/DD/YYYY
Valid To:	12/31/2003 MM/DD/YYYY
Schedule:	<input checked="" type="checkbox"/> Hair Care: Design Cut and Blow Dry \$45 (Active) (optional)
Service Locations:	<input checked="" type="checkbox"/> Village Center Plaza Salon (Open) (optional)

- **Direct Offer Name** is the title of a special discount or promotion represented by the Direct Offer. It should be short and descriptive as any promotional slogan:

Direct Offer Name:	Hair Care: First Visit Special
--------------------	--------------------------------

- **Description** is presented to your customers in order to provide more details about the special discount or promotional offer. You can also use Direct Offer description field to provide disclaimers and restrictions applicable to it:

Description:	Receive a FREE Neutrogena Shampoo Kit with your first visit to our salon booked online! (Limit one per customer. Can not be combined with any other offer.)
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- **Code** is unique identifier of the Direct Offer. You can use an accounting code or any alphanumeric abbreviation. Code is used for reference purposes only:

Code:	FRNEU
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- **Valid From** and **Valid To** dates define calendar availability of the offer. Both dates are required. Only those appointments scheduled for dates on or after “valid from” date and before or on “valid to” date can take advantage of the Direct Offer:

Valid From:	01/01/2003 MM/DD/YYYY
Valid To:	04/30/2003 MM/DD/YYYY

Valid dates apply to the actual date of an appointment, and not to the date when online appointment reservation is made. For example, Direct Offer is set to be valid from January 1, 2003 to April 30, 2003 and was published on December 5, 2002. In this particular case, any customer who makes an appointment after December 5, 2002 and April 30, 2003 for any date between January 1, 2003 and April 30, 2003 can take advantage of the offer.

- **Schedule(s)** matrix allows you to assign Direct Offer to one or more schedules. Schedule assignment defines if promotional offer is applicable to the service represented by schedule. At this point, there should be only one schedule available on your account. To assign Direct Offer to a schedule, check the box next to the schedule name:

Schedule:	<input checked="" type="checkbox"/> Hair Care: Design Cut and Blow Dry \$45 (Active)
	(optional)

- **Service Location(s)** matrix allows you to assign Direct Offer to one or more service locations. Service location assignment defines if promotional offer is available at the particular service location. At this point, there should be only one schedule available on your account. To assign Direct Offer to a service location, check the box next to the service location name:

Service Locations:	<input checked="" type="checkbox"/> Village Center Plaza Salon (Open)
	(optional)

If you skipped the Service Location Setup page and your account has no service locations defined, no location assignment option is presented here.

## Preview

Preview section of the Direct Offer Setup page allows you to inspect visual appearance of the Direct Offer in exactly the same way it is presented to your customers and prospects online:



## Configure Business Holidays

Business holidays define days of the year when your business is closed. To make sure Online Appointment Scheduler does not allow any appointments for such days, enter each one of the holidays you observe into your account configuration using this page:

**Configure Business Holidays**

Add New Holiday

Date:	<input style="width: 80%;" type="text" value="MM/DD/YYYY"/>
<input type="radio"/> On specified date only <input type="radio"/> Same day of the week every week starting on specified date <input type="radio"/> Same day of the month every month starting on specified date <input type="radio"/> Same date every year starting on specified date	
<input type="button" value="Add"/>	

Save changes and mark this configuration step completed  
 Discard changes, I will come back to this step later  
 Discard changes but mark this step completed anyway

Some holidays repeat every year on the same day, such as, for example, Christmas, New Years Day and U.S. Independence Day. Such holidays can be configured as repetitive in Online Appointment Scheduler. Other holidays, such as Thanksgiving, Martin Luther King Jr. Day and Presidents Day also occur every year but on different days – these holidays should be configured in Online Appointment Scheduler as “one-time” holidays, one for each year in the near future. You can use “one-time”, “same day every week” and “same day every month” options to set up holidays specific to your business.

To add a one-time holiday:

- Enter a holiday date in the “Date” field, for example “01/20/2003”.
- Select “On specified date only” option
- Click “Add” button:

Add New Holiday

Date:	<input style="width: 80%;" type="text" value="01/20/2003"/>
<input checked="" type="radio"/> On specified date only <input type="radio"/> Same day of the week every week starting on specified date <input type="radio"/> Same day of the month every month starting on specified date <input type="radio"/> Same date every year starting on specified date	
<input type="button" value="Add"/>	

To add repetitive holiday:

- Enter a first observed date in the “Date” field, for example “01/01/2003”
- Select one of the “Same day...” or “Same date...” options, for example “Same date every year starting on specified date”
- Click “Add” button:

Add New Holiday	
Date:	<input type="text" value="01/01/2003"/> MM/DD/YYYY
	<input type="radio"/> On specified date only <input type="radio"/> Same day of the week every week starting on specified date <input type="radio"/> Same day of the month every month starting on specified date <input checked="" type="radio"/> Same date every year starting on specified date
<input type="button" value="Add"/>	

Holidays are being added to the table on the top of the page. To remove the holiday from the list, click on the “Delete” button next to it. To make changes to the holiday, delete it first and re-add the holiday to the list using correct start date and repetition setting.

Holidays	
On January 01 every year since 2003	<input type="button" value="Delete"/>
On January 20, 2003 (Monday)	<input type="button" value="Delete"/>

Add New Holiday	
Date:	<input type="text"/> MM/DD/YYYY
	<input type="radio"/> On specified date only <input type="radio"/> Same day of the week every week starting on specified date <input type="radio"/> Same day of the month every month starting on specified date <input type="radio"/> Same date every year starting on specified date
<input type="button" value="Add"/>	

Once business holidays are configured, click on the “Define and Publish Business Policies” button to save changes and proceed to the next configuration step.

## Define and Publish Business Policies

Business policies allow you to define what personal information is required to be collected from your customers in order for them to make appointments; if they are required to pre-register in order to see appointment availability and what conditions they are subjected to, and should agree upon, in a case of appointment cancellation or no-show.

Business Policies Setup page is divided into three sections:

- Required Information Policy
- Cancellation Policy
- No-Show Policy

Each section is represented in its own tab. You can switch between tabs by clicking on the tab itself or by using “Next” and “Previous” buttons on the bottom of the page to go one step forward or one step back. The Business Policies Setup page is illustrated below:

### Define and Publish Business Policies

Required Information Policy	Cancellation Policy	No-Show Policy
Customer Registration & Verification for External Appointments		
Customer Registration via Quick Sign-up Allowed:		<input checked="" type="radio"/> Yes <input type="radio"/> No
Customer Registration via Enrollment Allowed:		<input checked="" type="radio"/> Yes <input type="radio"/> No
Customer Registration / Login Required:		<input type="radio"/> Yes <input checked="" type="radio"/> No
E-mail Verification via Activation Code:		<input type="radio"/> Yes <input checked="" type="radio"/> No
(E-mail verification feature requires both "Customer Registration / Login" and "Customer E-mail Required" for external appointments settings to be set to "Yes")		
Required Customer Information		
Registrations:	<b>Internal</b>	<b>External</b>
Business Name:	Hidden <input type="text"/>	Hidden <input type="text"/>
E-mail:	Optional <input type="text"/>	Required <input type="text"/>
Daytime Phone:	Required <input type="text"/>	Required <input type="text"/>
Evening Phone:	Required <input type="text"/>	Required <input type="text"/>
Mobile Phone:	Hidden <input type="text"/>	Hidden <input type="text"/>
Address:	Optional <input type="text"/>	Required <input type="text"/>
Customer Feedback		
Public Feedback Allowed:		<input checked="" type="radio"/> Yes <input type="radio"/> No
Private Feedback Allowed:		<input type="radio"/> Yes <input checked="" type="radio"/> No
<input type="button" value="Next &gt;"/>		
<input checked="" type="radio"/> Save changes and mark this configuration step completed <input type="radio"/> Discard changes, I will come back to this step later <input type="radio"/> Discard changes but mark this step completed anyway		
<input type="button" value="Setup Personalization"/>	<input type="button" value="Cancel"/>	<input type="button" value="Reset"/>

## Required Information Policy

Required information policy is responsible for customer registration options, customer contact information requirements and feedback policy. All settings on this page are pre-populated with default values designed to work in most common scheduling scenarios. You may change default settings to better fit your scheduling practices. There are two types of appointments in Online Appointment Scheduler:

- **External Appointments** are made by your customers online using your Customer Appointment Scheduler.
- **Internal Appointments** are made by you, your receptionist or members of your staff in Online Appointment Scheduler

## Customer Registration & Verification for External Appointments

Customer Registration & Verification for External Appointments	
Customer Registration via Quick Sign-up Allowed:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Customer Registration via Enrollment Allowed:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Customer Registration / Login Required:	<input type="radio"/> Yes <input checked="" type="radio"/> No
E-mail Verification via Activation Code:	<input type="radio"/> Yes <input checked="" type="radio"/> No
(E-mail verification feature requires both "Customer Registration / Login" and "Customer E-mail Required" for external appointments settings to be set to "Yes")	

- **Customer Registration via Quick Sign-up Allowed:** This setting determines if you allow your customers to pre-register in your online scheduler using "Quick Sign-up" tab. This registration tab requires minimum information from your customers. 'Customer Registration via Quick Sign-up Allowed' option is enabled by default. If you require your customers to provide complete contact information before accessing your Customer Appointment Scheduler, you should set this option to 'No'.
- **Customer Registration via Enrollment Allowed:** This setting determines if you allow your customers to pre-register in your online scheduler using "Enrollment" tab. This registration tab requires complete contact information from your customers. 'Customer Registration via Enrollment Allowed' option is enabled by default.

**IMPORTANT:** Setting both 'Customer Registration via Quick Sign-up Allowed' and 'Customer Registration via Enrollment Allowed' options to 'No' effectively disables pre-registration in your online scheduler. Use this approach if you only allow authorized customers to use your online scheduler. If both settings described above are set to 'No', only customers whom you have registered internally in Online Appointment Scheduler with online access enabled will be able to use your online scheduler to make appointments.

- **Customer Registration / Login Required:** This setting determines if you require your customers to pre-register or login to your online scheduling site prior to seeing available appointment dates and times. If set to "Yes", your customers should fill in the registration form before accessing your calendar. If set to "No" (default), they can navigate directly to your calendar, pick date and time for the appointment – only then they will be asked to provide their name and contact information. It is recommended to leave this setting at its default value.

- **E-mail Verification via Activation Code:** In most cases your customers should be trusted to provide their real e-mail address on the customer contact information form. However, typing mistakes or bogus entries do happen occasionally. If it is critical for your business to have 100% accurate e-mail addresses for all of your customers, you may change this setting from default “No” to “Yes”. In this case all of your customers will be required to pre-register prior to making appointments. They will be also required to enter their customer profile activation code at the time they make their first appointment. The activation code is sent automatically by Online Appointment Scheduler to each customer who registers on your online appointment scheduling page.

**IMPORTANT:** Setting “E-mail Verification via Activation Code” to “Yes” is a very restrictive option. It makes online appointment scheduling much more complicated to your customers. Unless your customer base is highly computer literate and patient, or you start to receive large number of appointments with bogus e-mail addresses, you should **not** enable the “E-mail Verification via Activation Code” option.

### Required Customer Information

Required Customer Information		
Registrations:	Internal	External
Business Name:	Hidden	Hidden
E-mail:	Optional	Required
Daytime Phone:	Required	Required
Evening Phone:	Required	Required
Mobile Phone:	Hidden	Hidden
Address:	Optional	Required

You can configure **Business Name**, **E-mail**, **Daytime Phone**, **Evening Phone**, **Mobile Phone** and **Address** to be either “Required”, “Optional” or “Hidden”. Each customer profile field can be configured individually. Requirements can be set differently for internal versus external customer registrations.

**IMPORTANT:** You can also rename default customer profile fields, as well as add your own. This functionality is not included in the basic account configuration, but can be invoked at a later time in Account Setup Center under Required Information Policy.

### Customer Feedback

Customer Feedback	
Public Feedback Allowed:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Private Feedback Allowed:	<input type="radio"/> Yes <input checked="" type="radio"/> No

- **Public Feedback Allowed:** “Yes” if your customers are allowed to share their experience with your services to other customers, “No” if they are not allowed to do so. Default is “Yes”.
- **Private Feedback Allowed:** “Yes” if your customers are allowed to share their experience with you, “No” if they are not allowed to do so. Default is “No”.

## Cancellation Policy

Cancellation policy is a general agreement between you and your customers on specific conditions applicable to the process of appointment cancellations. This policy is published on your online scheduling pages. It is also included on appointment notification, confirmation and reminder e-mails sent to your customers by Online Appointment Scheduler. If no policy text is entered, the cancellation policy is not published.

Required Information Policy	<b>Cancellation Policy</b>	No-Show Policy
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Policy: **Appointment Cancellation Policy** (Published, Appointment Level)

Policy Text: 

It is required that if you are unable to attend your scheduled appointment, or if you must cancel your appointment for any reason, you must provide us with the courtesy of at least 24 hours notice so that we may reschedule your appointment time to someone else.

Appointments can be cancelled online 24/7 or by calling our office during regular business hours. All appointment cancellations requested in less than 24 hours prior to the appointment are subject to the \$20 late cancellation fee.

(optional)

< Previous
Next >

You should use the cancellation policy to publish specific conditions under which you allow your customers to cancel appointments, such as cancellation request deadline, any late cancellation fees if applicable and ways to request appointment cancellation.

## No-Show Policy

No-show policy is a general agreement between you and your customers on specific provisions of your customer policy towards customers who are late or completely miss their scheduled appointments. This policy is published on your online scheduling pages as well as it is included on appointment notification, confirmation and reminder e-mails sent to your customers by Online Appointment Scheduler. If no policy text is entered, the no-show policy is not published.

Required Information Policy	Cancellation Policy	<b>No-Show Policy</b>
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Policy: **Appointment No-Show Policy** (Published, Appointment Level)

Policy Text: 

If for any reason, you are late or do not come at all for your scheduled appointment without prior cancellation, we reserve the right to refuse any future appointments. If you will not be able to make your appointment, please be sure to cancel or reschedule your appointment for a later time in advance. If you have to cancel or reschedule your appointment for any reason, you may do online 24/7 or by calling our office during regular business hours. All appointment no-shows are subject to the \$40 service fee.

(optional)

< Previous

You should use the no-show policy to publish penalties you enforce on customers who do not attend to scheduled appointments without prior cancellations.

## View other Account Setup settings

This is the last page of the New Account Setup Helper. Its purpose is to inform you of other important areas of Online Appointment Scheduler that are not covered by the New Account Setup Helper as well as to provide you with shortcuts to corresponding pages.

### View other Account Setup settings

Keeping your account settings up to date is important.

There is much more to your account configuration than is covered by the Account Setup Helper. While other account settings may be not that crucial to your business operation as the ones you have configured here, nevertheless make sure you check out the following:

- ➔ [Silver PRO Membership](#)
- ➔ [Account Administrator](#)
- ➔ [Restricted Availability](#)
- ➔ [Credit Card Billing](#)
- ➔ [Business Users](#)

To learn how to integrate online appointment scheduling with your web site and how to start making appointments visit [Web Site Integration](#) section of [Account Setup Center](#).

Remember, all account settings can be changed at any time from the [Account Setup Center](#).

**Ok, do not remind me later**

Finish Account Setup

Cancel

Reset

- **Membership** defines the level of service on your account. It sets limits on a maximum number of schedules, personnel, custom forms, service locations, Direct Offers and business users on your account. Click on the “Membership” link to inspect the level of benefits available to you under your current membership.
 

**IMPORTANT:** Online Appointment Scheduler’s Account Setup Center allows you to **upgrade** or **downgrade** your membership level at anytime online. To change your membership, simply click on the “Edit Account” button on the membership page, select new membership level and confirm your selection by clicking on the “Save” button.
- **Account Administrator** is the primary business user of your account. To inspect and update administrator’s name, login, e-mail address and other credentials, click on the “Administrator” link.
- **Restricted Availability** allows you to limit your appointment availability for specific days, weeks or hours, on one-time or recurring basis. Availability can be restricted selectively by schedules, personnel or service locations. Restricted availability is defined by means of time blocks that have start and end times, scope (recurrence) and effective dates.
- **Credit Card Billing** link points to the credit card information section in Account Setup Center. It can be used to update your credit card in Online Appointment Scheduler, if your credit card expires or is cancelled.

AppointmentQuest Online Appointment Scheduler keeps your credit card information safe and secure. In order to provide you with maximum security while viewing or updating your credit card, you are required to login to Online Appointment Scheduler using secure SSL connection, or switch to secure SSL connection prior to accessing billing pages. Only account administrator can view and change the credit card on your account.

- **Business Users** are authorized users of your Online Appointment Scheduler Account. In addition to administrative access, you can create separate business user records for your staff members who need access to your account. Business users can make, confirm, deny and reschedule appointments, download appointment summaries and customer information as well as perform basic maintenance functions on your account. Each business user can be configured with specific permissions, limiting his or her access to sensitive areas of Online Appointment Scheduler.
- **Web Site Integration** page provides you with detailed instructions on how to integrate online appointment scheduling with your business web site. “Web Site Integration” page describes multiple linking options and includes examples of HTML code for you to use on your web site.
- **Account Setup Center** link points you to a single point of entry into your account configuration in Online Appointment Scheduler. Account Setup Center allows you to inspect and make changes to your account profile, business hours, holidays, policies, schedules, personnel, custom forms, service locations, Direct Offers and business users.

**IMPORTANT:** Once you complete your New Account Setup, you should use Online Appointment Scheduler’s Account Setup Center to make any further changes to your scheduling configuration. Make sure you can navigate your way to the Account Setup Center before clicking on “Finish Account Setup”.

To complete your account setup and permanently dismiss Account Setup Helper, check the “Ok, do not remind me later” option at the bottom of the page and then click on the “Finish Account Setup” button:

Ok, do not remind me later

Finish Account Setup

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