# Periodic Scheduling Setup Guide

## User Manual

Date: 8/4/2017

# pickatimehelp

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# Periodic Event Setup



Home > Periodic Event Setup > Checklist

# Checklist

## 1. Create the Event

The Event can be the name of your Event, for example, Health Screenings. If you have multiple locations, you may choose to name your events by locations, for example, San Francisco.

## 2. Create Resources on your Event

The Resource will hold the slots. Depending on your event you might have a single resource, for example, Health Screenings. Or you might have multiple resources, for example, Joe Counselor1 and Joe Counselor2.

## 3. Create Slot Template

Create the schedule of recurring slots.

## 4. Modify Slots (optional)

Remove slots for holidays / exceptions

## 5. Configure Settings

### Configure Appointment Settings

### Configure Email

### Configure Customer User Interface

### Global Settings

## 6. Turn it On and Try it Out

Once you have set up your resources and appointment times you can turn on the display of the appointment booking web page.  View for yourself the appointment booking web page.

Home > Periodic Event Setup > Step 1: Create Event

# Step 1: Create Event

- Log in to your pickAtime account, and select Admin UI from the Account Navigation line at the top. This will open a new browser window and will take you to the Administrative User Interface.
- Select the **Events** button on the pickAdminUI sidebar.
- Click on the + Add button to add a new event.
- Enter in a name for your event, for example, Health Screenings at Seattle Grace, Physical Exams, Counselor Appointments
- Select type of **periodic**
- If you have previously used pickAtime, you will then have a pull down where you can select a template from one of your previous events. The template will determine the starting settings (from the UI Setup, CUI Messages, and the E-Mail Templates pages) for your event.
- Select the event time zone.
- Optionally you can add the Date and Location for your event.

> It is important to enter in the correct time zone as this will be used to open and close the scheduler at the correct time. Also, if you are offering the option for your participants to add their appointment to a calendar, this is the time zone that the appointment will be added in at.

You will then see a row listed for your event. You can also enter a location and a date. The date does not establish the exact date of your event, the date you enter here is simply a label. You can set it to a range of dates as well. If you have a location for your event that you would like your customers to see then fill in the location.

For any event you can also use the Event Details box on the screen to fill in any event specific information that you may want in the display of your scheduler or in your emails for this event. Any text that you add in the Event Details box will be available as a macro field that you can use in your CUI Messages or in your E-Mail Templates. The macro for the Event Details is $(E_DESCRIPTION).

You can set up multiple events on your account.

If there is more than one event active when the customer goes to the CUI, they will be presented with a choice of events in a pull-down. Each event is listed with its name, date, and location.

## Next Step

Once you have created the Event you are ready to Create the Resources. The resources hold the slots. They can be the specific person that an appointment will be made with or a more generic entity such as nurse, or the name of the event for example, health screening.

Home > Periodic Event Setup > Step 2: Create Resources

# Step 2: Create Resources

The Create Resources option will allow you to set up the resources that will contain your slots.

- Select the Events option on the dashboard. Then select your event from the list and click on the 

button.
- Select the **Appointments** tab.
- Select the **Resources** drop-down and select **Add Resource**.
- Click in the title area of the new resource and edit the name.

The resource is the entity that holds your time slots. Your resource could be the name of a person (e.g. Dr. Jones) or it could be a generic name such as Flu Shots, or Screenings.

You can create as many resources as you like. Each resource can hold many slots, but none of the slots can overlap in time on one resource. If you need overlapping slots you will need to create additional resources.

Resources can represent a resource in your business, like a mechanic, or a dental chair. For events like flu shots, you should create just one resource even if there will be more than one nurse at the site because the customer doesn't need to specify which nurse.

## Next Step

Once you have created the Resources, you are ready to Create the Template.

Home > Periodic Event Setup > Step 3: Create Template

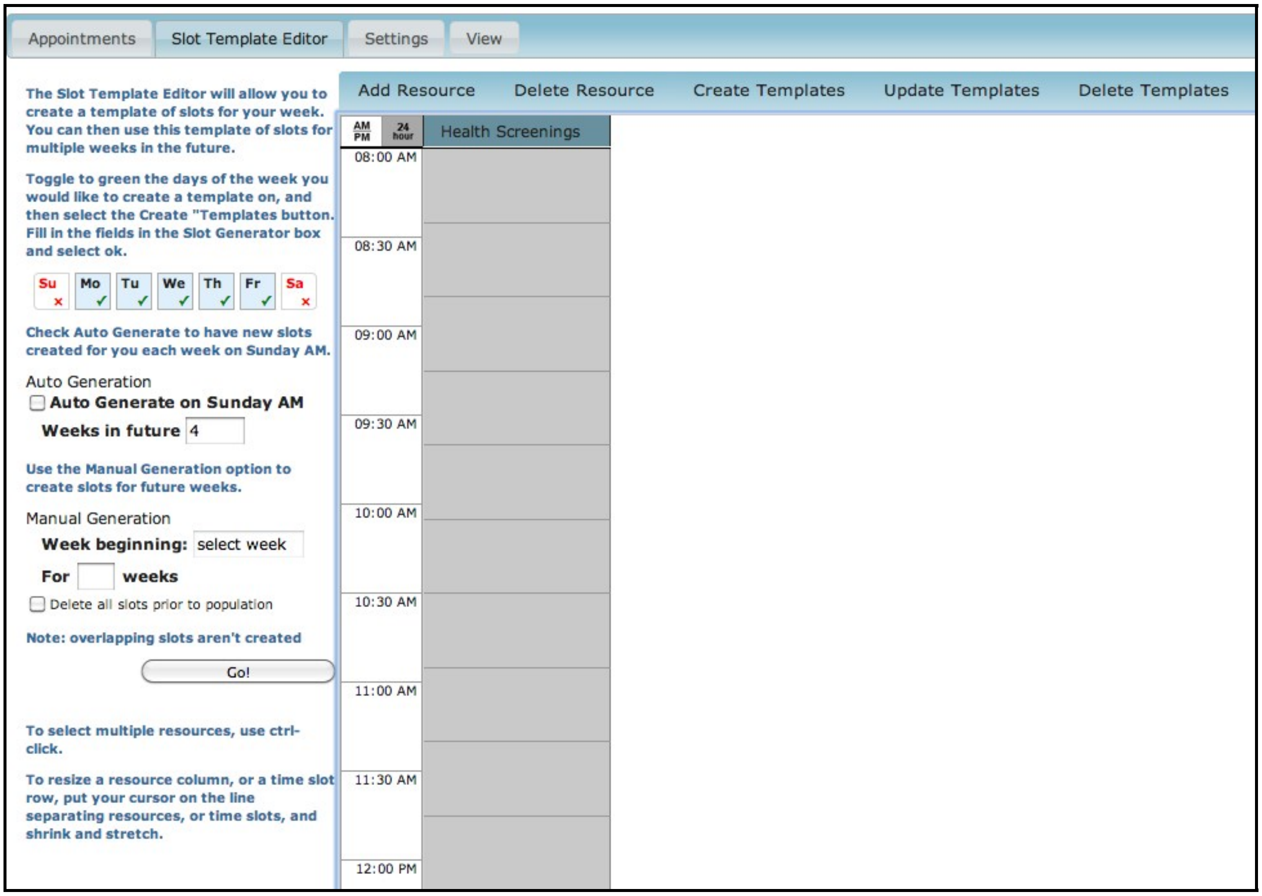
# Step 3: Create Template

A template is a weekly set of slots that the system will generate for you each Sunday early in the morning. After the slots are created you can alter them to add or remove slots if there should be any differences between that particular week's slot set and the template. For example, you might want to remove the slots that fall on a holiday.

- Select the Events option on the dashboard. Then select your event from the list and click on the 

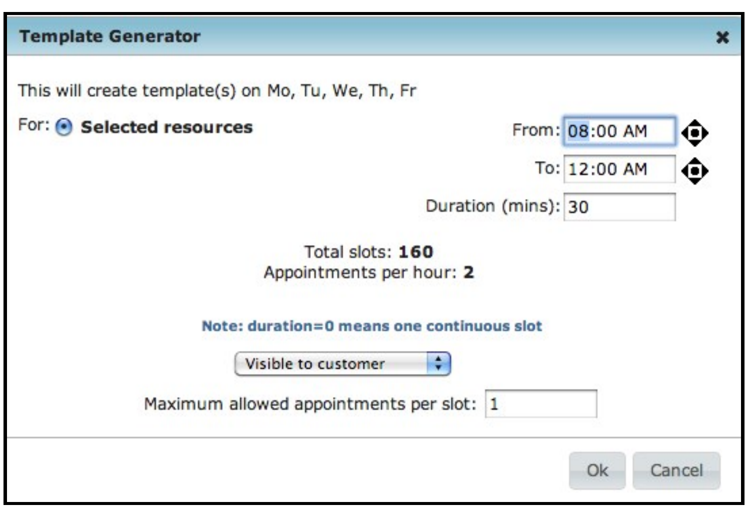
button.

- Select the **Slot Template Editor** tab.




At the top on the left-hand side you should select the days of the week that you want the slots to appear and the days of the week that you want to create your slot template for.

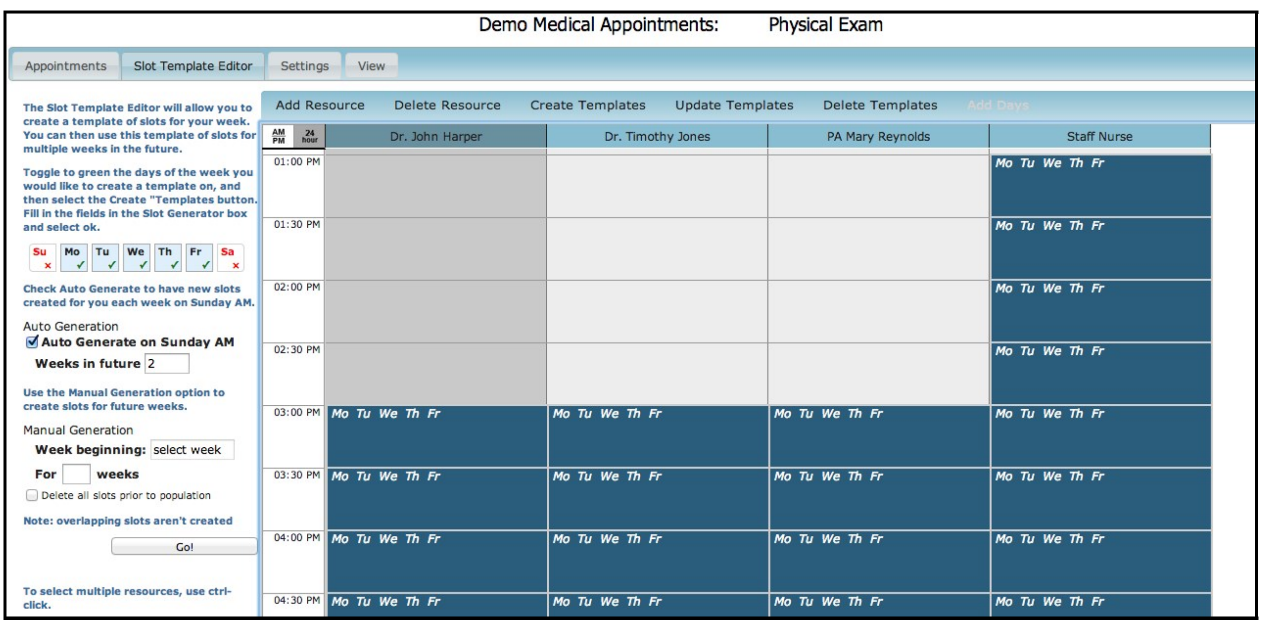
- Select **Create Templates.** This will bring up the Template Generator dialog box.



- Make sure that you've selected whether you want the slots to be created only on the selected resource or all the resources.
- Enter the start time of the first slot of the day in the **From** field.
- Enter the end time of the last slot of the day in the **To** field.
- Enter the **Duration** in minutes
- Select what type of slots you would like.
  - **Visible to customer** - means a normal slot that the customer can book from the CUI
  - **Hidden from customer** - means the slots are only visible on the VUI. Customers cannot book appointments for this without calling you.
  - **Shown with "call" status** - means that the customer will see these slot if they are available, but when they try to book the appointment they will get a message directing them to call to get this time.
- Enter the maximum number of appointments per slot in the **Maximum allowed appointments per slot** field.
- Select the **Ok** button to create as many slots as can be fit between **From** and **To**.

The days of the week selections determine both what days of the week the template slots will be created for, but also what slots are displayed on the template editor tab. For example, if you select only Sunday, then create some slots, then select only Monday you will see no slots. If you select all the days, you will see the slots you created for Sunday.

Once you have your template created your screen may look something like the following:




## Create Slots from your Template

Set the "weeks in the future" value to how many weeks from each Sunday you want the system to generate a new week, and check the "auto generate..." check box. Changing this setting has no immediate effect. You will have to wait until after next Sunday to see that the system has generated your new slots. In addition to turning on the automatic system, you will need to manually populate the weeks between that week and now.

In the manual generation section click on "select week" to tell the system what week should be the first, then enter the number of successive weeks you would like the system to duplicate. Once these slots have been generated you should add or remove specific slots from the **Slots** drop-down on the **Appointments** tab to make your slots correct for any holidays or other exceptions.

### Customer can't see slots after...

The "customer can't see slots after" setting that is found on the **UI Setup** page under the **Settings** tab can be used to prevent customers from booking appointments too far in the future. At first, this seems redundant with the automatic slot generation feature. However if you set "customer can't see slots after" to 10 weeks for example, and the auto generate process creates slots 12 weeks in the future, you have 2 weeks to add or remove slots to handle exceptions before the customer can book appointments on them.

## Next Step

Once you have created the template, you may want to modify your slots for any holidays or exceptions to the recurring schedule. See Create Slots section.

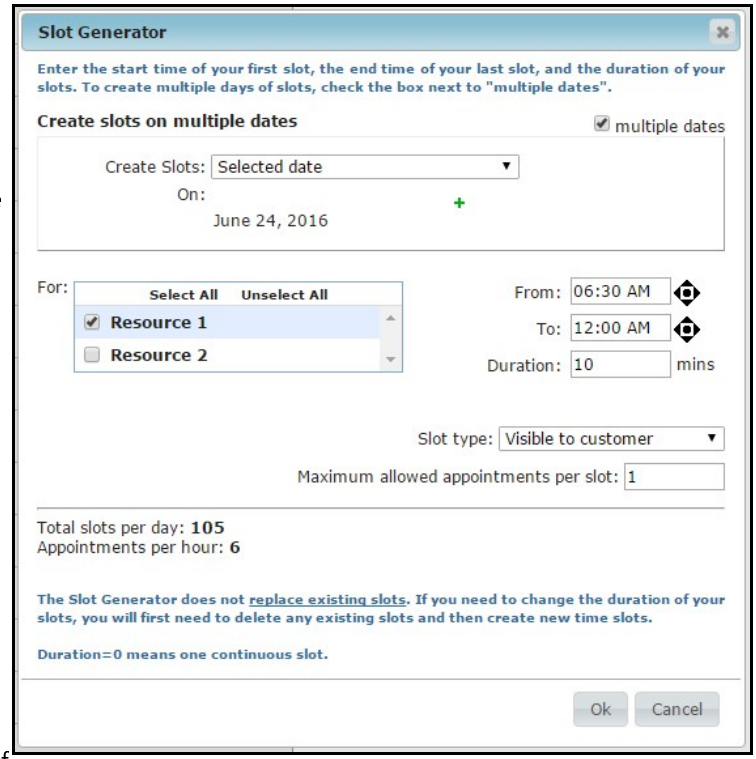


# Step 4: Create Slots

The Slot Generator will generate any number of slots between the **From** and **To** times depending on the duration on the currently selected day. For example, if you want 6 slots per hour of 10 minutes each between 8 am and 5 pm, enter 8:00 am in the **From** field, 5:00 pm in the **To** field, 10 for the **Duration** and 6 in the **Maximum allowed appointments per slot**.

- From the Admin UI select the Events option on the dashboard. Then select your event from the list and click on the 

 button.




- Select the **Appointments** tab.
- Select the day you want to create slots on.
- Select the **Slots** drop down and then select **Create Slots**. This will bring up the Slot Generator dialog box.
- Make sure that you've selected whether you want the slots to be created only on the selected resource(s) or all the resources.
- Enter the start time of the first slot of the day in the **From** field.
- Enter the end time of the last slot of the day in the **To** field.
- Enter the **Duration** in minutes.
- Select what type of slots you would like:

  **Visible to customer**
  Leave this default setting if you would like the appointments to be visible to your customers.

  **Hidden from customer**
  Select this if you want the slots to be hidden from the CUI (could be used to reserve slots).

  **Shown with "Call" status**
  Means that the customer will see these slots if they are available, but when they try to book the appointment they will get a message directing them to call to get this time.

  **Make unavailable**
  Select this option if you would like the slots to display in the Administration section of the site but not be available to your parents. You will be able to enter a message in the slot (e.g. Lunch Break).

- Enter the maximum number of appointments per slot in the **Maximum allowed appointments per slot** field.
- Select the **Ok** button to create as many slots as can be fit between **From** and **To**.

If you have multiple days of identical slots you can check the box "multiple dates", and create the same slots on more than one day. If your slots are different each day, simply create slots on your first day, then select the next day from the calendar on the left-hand side and repeat the process.

The Create Slots function does not "redo" any existing slots. For example, if you create slots from 8 am to 12 pm, and then you realize you only needed slots from 9 am to 12 pm, you can not simply “Create Slots” again with your new parameters. You will either need to delete the slots from 8 am to 9 am, or delete all slots and start again.

If your resource has a generic name such as Nurse or Flu Shots and you can take multiple appointments in any given time slot, you will want to set the Maximum Allowed Appointments per slot to the number of appointments you can take in that slot.

Example: you have 4 nurses who will be doing flu shots every 10 minutes. You would name your resource nurse, and you would create your time slots with a Duration of 10 minutes, and set the Maximum Allowed Appointments per slot to 4.

## Updating Slots

The Update Slots feature will allow you to update the characteristics of existing slots. This feature will allow you to increase the number of allowed appointments per time slot, or to make slots unavailable or hidden to your customers.

- From the Admin UI select the Events option on the dashboard. Then select your event from the list and click on the 

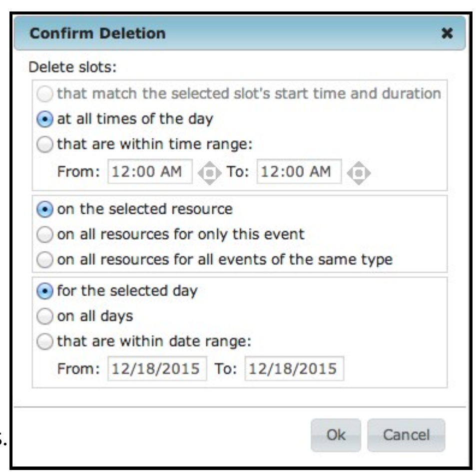
button.
- Select the **Appointments** tab.
- You will see a calendar on the left-hand side. Select the correct date.
- Select the correct resource if you have more than one resource.
- Select the **Slots** drop-down and then select **Update Slots**, this will open up the Slot Updater dialog box.
- The dialog box will allow you to enter in a range of times. You will have several options for making changes to an existing slot.

Update Slots will only change the characteristics of existing slots. It does not change the duration or start or end time of existing slots.

## Remove Slots - individual scheduling exceptions

- From the Admin UI select the Events option on the dashboard. Then select your event from the list and click on the 

button.
- Select the **Appointments** tab.
- You will see a calendar on the left-hand side. Select the correct date.
- Highlight the resource column.
- Select the slot that you would like to remove.
- Select **Slots** and then **Delete Time Slots** ; this will open up a Confirm Deletion dialog box
- The dialog box will ask you for details on the deletion. Please read carefully to ensure that you are only deleting slots on the correct date/resource/time combination.

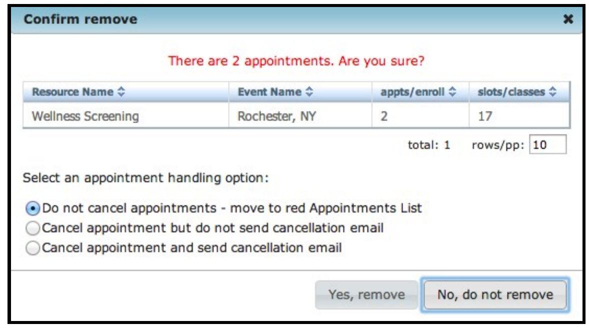



You will be able to delete all slots that occur at that time on all resources. For example, if you want to schedule a lunch break for all recources, you could enter the start and end time of the lunch break and delete any slots during that time.

You can also create breaks by using the **Update Slots** feature and making some slots "hidden" or unavailable.

If you are deleting slots with appointments on them, a second dialog box will come up.

This dialog box will provide you with several options for the appointments that are on your soon to be deleted slots.




- You will have the option of not canceling the appointments. As the slots will be deleted these appointments will be moved to the red Appointments List. From here you will need to attend to these appointments, by either deleting them from the red Appointments List, or by recreating the appointment slot. This red Appointments List is a holding area for "problem" appointments.
- You will have the option of canceling the appointments and not sending a cancellation email.
- You will have the option to cancel the appointment and send a cancellation email. The cancellation email that you have set up in the **Settings > E-Mail templates** page will display and you will be able to edit this or send it as is.

## Blocking Slots

You can "block" a slot by turning an existing slot to red and optionally entering in a message for the blocked slot, such as "Lunch Break." In the Admin UI on the **Appointments** page, you would simply click on the x in the corner of a slot. The slot will then turn red and the message "Blocked" will appear in the slot. You can leave that message or edit the message. This slot will then not be displayed on the scheduling page to your customers. At any time you can "unblock" the slot by clicking on the x in the corner and returning the slot to blue.

Blocked Slots will display on your reports when the "show all slots" option is checked.

As an alternative to blocking slots, you can always delete slots.

### Making Changes to your Slot Start Times or End Times or the Duration

In order to modify your slots after they have been created you will need to first delete the existing slots. The **Create Slots** process will not simply override slots that you have previously created. For example, if you have created 10-minute slots from 8 am to 2 pm, and you now decide that you would like your slots to run from 9 am to 1 pm, you can not create this new slot scenario on top of your existing slots. You must either delete the slots from 8 am to 9 am, and from 1 pm to 2 pm, or delete ALL slots and then create new slots from 9 am to 1 pm.

## Move Slots

The **Move Slots** feature will allow you to move all your slots and appointments (if any) to a new date. The **Move Slots** option will bring up a dialog box where you can enter a destination date for your slots and appointments to be moved to. You will have the option of sending an explanation email to all customers with an appointment. You also have the option to move the slots only for a selected resource or resources.

**Important Note:** new calendar notification emails will not be sent, so participants should be advised to update any calendar entries they have set.

## Copy Slots

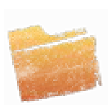
The **Copy Slots** feature will allow you to copy one day of slots to another day.

## Next Step

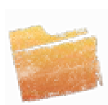
You are now ready to configure the settings for your event. Start with Appointment Settings.

Home > Periodic Event Setup > Step 5: Settings

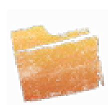
# Step 5: Settings



Appointment Settings



Configure Email



Configure CUI

Home > Periodic Event Setup > Step 5: Settings > Appointment Settings

# Appointment Settings

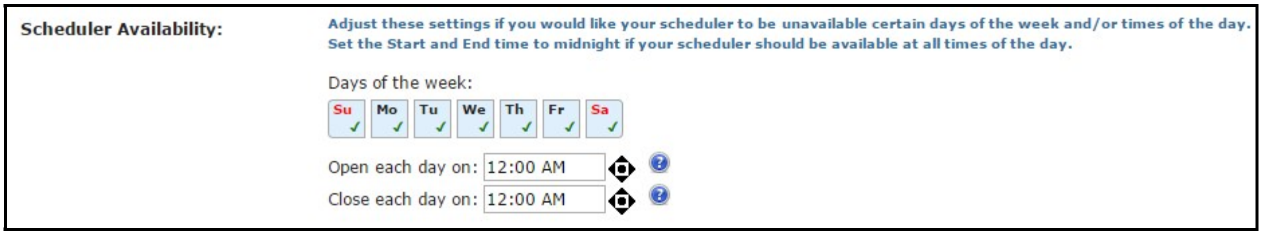
On the **UI Setup** page in the **Settings** tab you can adjust various settings specific to your event.

- From the Admin UI on the Events option on the dashboard. Then select your event from the list and click on the Go To Event button.
- Select the **Settings** tab and then **UI Setup**.

From the top of the page work your way down:

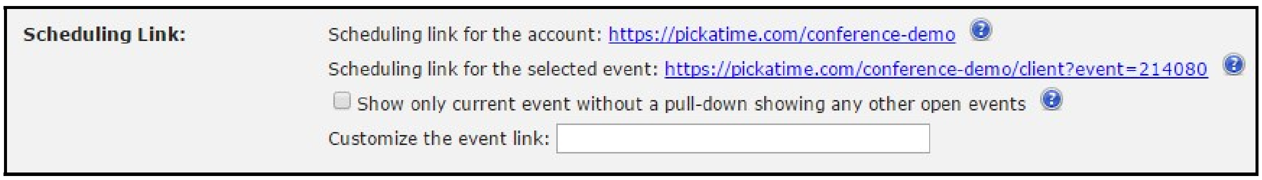
**Event Settings**

## Scheduler Availability



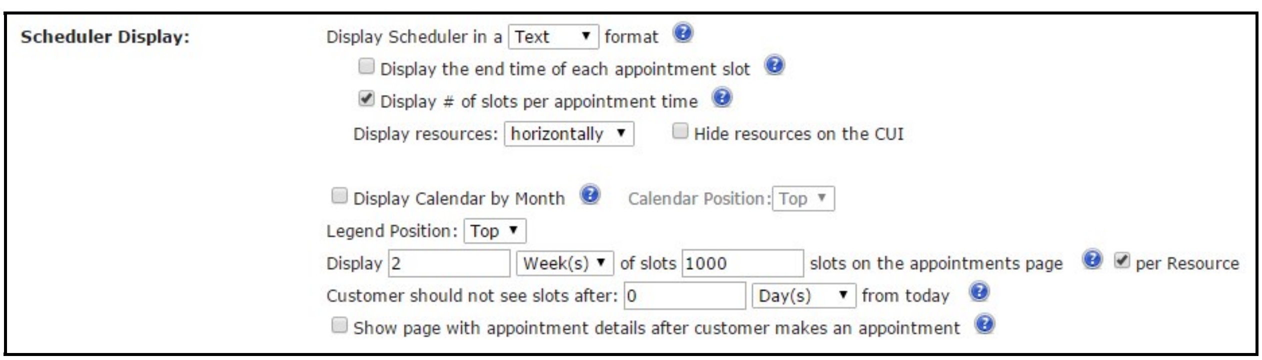

With the Periodic Scheduling product you can establish a different start and end time for each day of the week. To specify a specific start and end time for a particular day check the date so that a green check box appears. Then fill in the**'Open/Close each day on'** for your availability.

## Scheduling Link




- The **"Scheduling link for the selected event"** lists the site address for the selected event that you can either use on your school web page or provide to participants in an email to use when booking an appointment. If you click on this link a new browser window will open up that is the Customer User Interface (CUI) for your event. You can also enter a customized event name. This will then be appended onto your account URL. For example, if you have customized your event URL to https://pickatime.com/anyschool, your custom event URL might look something like this: https://pickatime.com/anyschool/LS or https://pickatime.com/anyschool/US. Note, that when using the custom event URL's the participant will still have the option to toggle to any other open event on the account.
- Check **"Show only current event without a pull-down showing any other open events"**, and then provide the 'Appointment URL for Event' to your participants if you would like them to see the scheduler for the current event only.

## Scheduler Display Options




- There are four formats for the display of slots to the participant: table, text, list and vertical. Set format to Text to get a text listing of the available time slots. If Text display is selected you will also have the option to display the end time of each appointment, the number of available appointments per slot, and you will be able to display each resource in a pull-down. You will also have the option to "hide the resource" so the resource name will not display on the scheduling page.

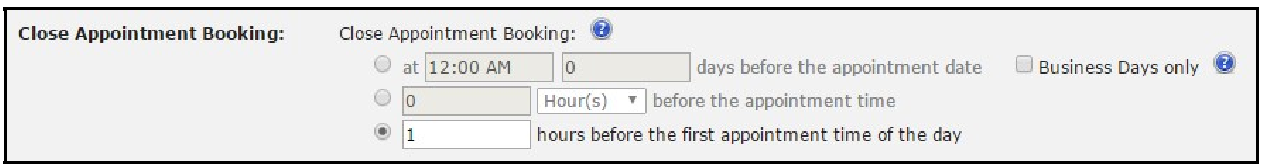
Set format to Table to get a graphical listing.
Set format to List to get a list of available appointments. List type could be adjusted on the **Settings/CUI Messages** - List View.
Set format to **Vertical** to get a vertical list of available times (appointments). **Vertical** type is available only with the CUI template: new. (Global Setup/Business Setup -> Other Settings - CUI Template).
With **Vertical** user interface type you can use an option: "**Display time slots in three columns: Morning / Afternoon / Evening**". See Example Here.

- **Display Calendar by Month** will display a monthly calendar either above or to the left of your available appointments. The customer can then click on an available date on the calendar to see the availability for that day.

- **Legend position** can be set to either the top or the left. If you select a legend position of "left" you will also have the option of a separate legend per child, and if you have imported a class name you have the option of having the class name displayed after the teacher name. **Important Note:** In order to have the class name available on the printable schedule, you must have the legend position set to the left, and check the box "separate legend for each child" along with the box "show class names." Otherwise, the customer is booking an appointment with a teacher, but not a teacher and class combination.

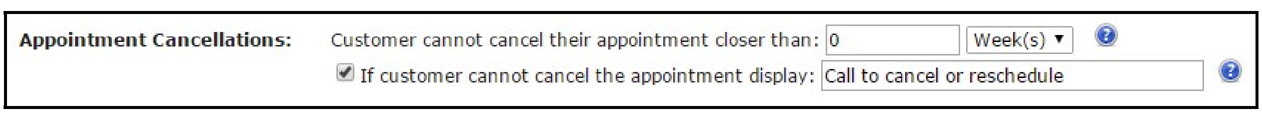
- Check the **"Show page with appointment details after customer makes an appointment"** box if you would like a web page with appointment details to pop up after the customer has made an appointment. This feature is typically not used by schools when customers are making multiple appointments.

## Close Appointment Booking




- **"Close Appointment Booking"** allows you to make slots become unavailable some amount of time before the appointment. There are 3 options. Close appointment booking at XX time XX days before the appointment date. Close appointment booking XX hours before the appointment time. Close appointment booking XX hours before the first appointment time of the day.

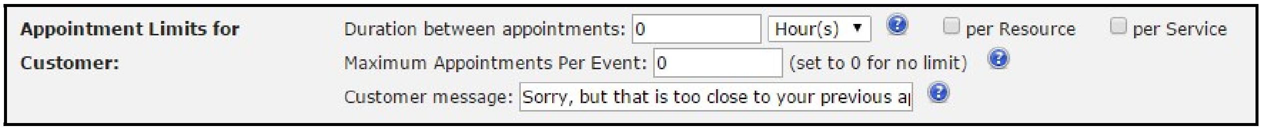
## Appointment Cancellation




- If you want to prevent participants from canceling their appointment within some amount of time before the appointment change **"Customer cannot cancel their appointment closer than X hours/days/weeks. "** Set this to 0 if you do not care if participants cancel a minute before they show up. Set this to a large value if you don't want them to be able to cancel the appointment.

- Check the box "**if customer cannot cancel the appointment, then display 'call to cancel' message**", if you would like participants to see a 'call to cancel' message. You may also want to enter in a number for the participants to call to cancel.

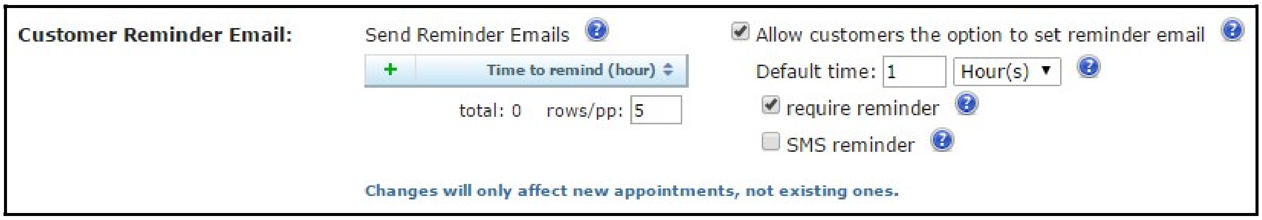
## Appointment Limits for Customers




The appointment limit section is where you can set limits on how many appointments a customer can make.

- When **"Duration between appointments"** is set to a non-zero value the system will not allow the customer to make a second appointment closer than the setting. If they attempt to make one the "**customer message**" will be displayed. You can limit this by resource or by service.
- **"Maximum Appointments Per Event"** prevents the customer from creating more than the allowed appointments per event. When they attempt to make too many the "**customer message**" will be displayed.

## Customer Reminder Email



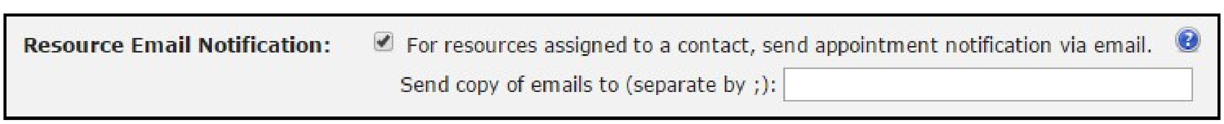

You can require email reminders and set the time in advance. Select **Add** and enter in the time (in hours) prior to the appointment that you would like an email reminder to be sent. You can add multiple times here for multiple email reminders.

Or you can give your participants the option of choosing whether they'd like a reminder and when they'd like it sent. The participant can select how much time before their appointment it should be sent, but you can set the default value that will be shown to them.

- Check the **"set from CUI"** if you want to allow your participants to set the default time to receive a reminder email.
- Set **"require reminder"** to force your participants to receive a reminder email.
- If you check both **"require reminder"** and **"set from CUI"** your participants will be able to select when the reminder email will be sent, but will not have the option of not receiving an email.

**IMPORTANT NOTE:** The automatic reminder email will be created at the time the customer books the appointment. Once the appointment is booked, if you add a new automatic reminder time this will only apply to subsequent appointments booked.

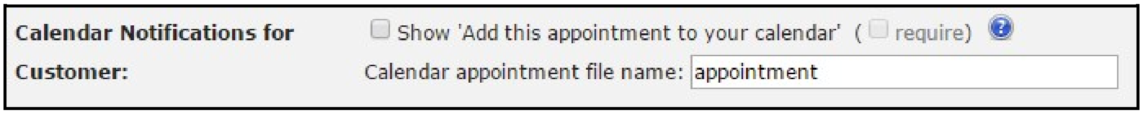
## Resource Email Notification




- Check the box "**for resources assigned to a contact**, **send appointment notification via email"** if you would like an email to be sent to the resource (i.e. teacher, counselor) each time a customer makes an appointment.

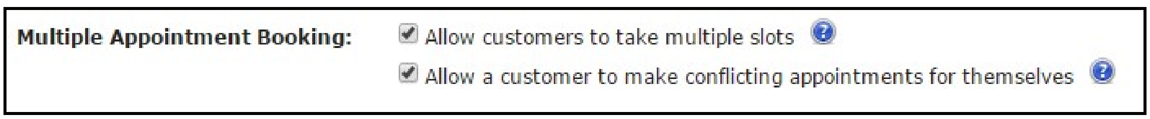
# Advanced Settings

## Calendar Notification for Customer




- Check the box **Show "Add this appointment to your calendar"** to provide your participants with the option of receiving an email calendar notification. Check the box 'require' if you would like the confirmation email to your participants to always include the calendar appointment notification. For Gmail, the appointment will automatically be added to the customer's calendar.
- **Calendar appointment file name:** allows you to enter a name that the appointment file will be labeled.

## Multiple Appointment Booking




- Check the box "**Allow customers to take multiple slots**" if you would like your customers to be able to book more than one slot for the same appointment time.
- Check the box "**Allow customer to make conflicting appointments for themselves**" if you would like your customers to be able to book more than one appointment at the same time.

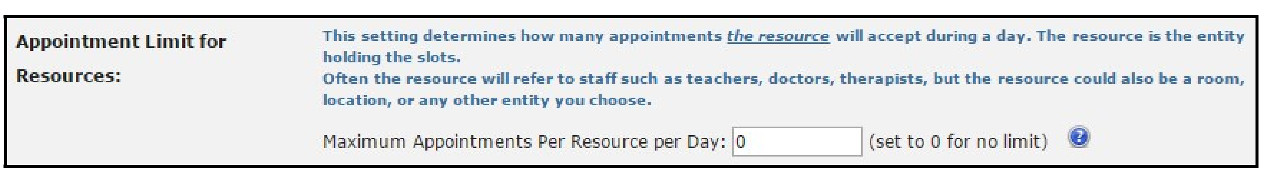
## Cancel Past Appointments


- Check the box "**Allow customers to see and cancel past appointments**" if you would like your customers to be able to see and cancel past appointments.

## Appointment Changes


- Check the box "**Do not display 'Change time' option**" if you would like your customers would not be able to change time of the booked appointment.

## Appointment Limit for Resources




- **"Maximum Appointments Per Resource per Day"** allows you to set a limit of how many appointments per resource can be booked on any day. For example, you can create 15 slots on a day, but restrict the Maximum

Appointments for the resource to 10. As soon as the 10th appointment is booked at any time on that day, no more appointments can be booked.

## Adjust Appointments Displayed


- **"Adjust Allowed Appointments"** allows you to display only part of the available appointments per slot on the Online Scheduler. This feature can not be used if you are using 'Services' which hold more than one slot. Also if you are using Customer user interface type Text with 'Hide resources on the CUI' activated, then you can not use 'Adjust Allowed Appointments' feature.
- **"Minimum for the start"** allows you to set the number of appointments per slots which you would like initially to show up on the scheduler.
- **"Filled up"** - this option is set to 100% as default, but can be adjusted. Once 100% (or your selected %) of slots are booked, a new set of slots will open up for booking. Note, that this will never exceed the 'Maximum Allowed Appointments per slots' you set when creating the slots.

### Next Steps

You are now ready to Configure Email.

Home > Periodic Event Setup > Step 5: Settings > Configure Email

# Configure Email

On the **E-Mail Templates** page in the **Settings** tab you can adjust various settings specific to your event.

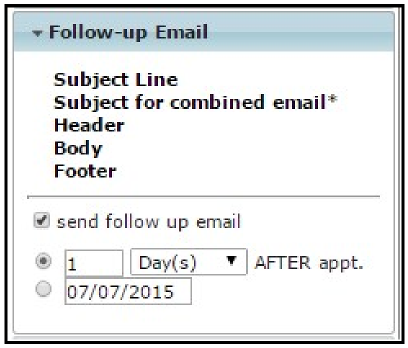
- From the Admin UI on the Events option on the dashboard. Then select your event from the list and click on the 

button.
- Select the **Settings** tab and then **E-Mail Templates**.

The system can send five different emails.

- **Confirmation Email** - sent after the appointment is booked, either by the parent or the administrator. This email will be sent if you have checked the box "send confirmation email" at the top of the page.
- **Reminder Email** - sent some amount of time before the appointment, or when the administrator selects the **Send Reminder** button from the **Appointments** tab. You have the option of requiring a reminder email to be sent, or letting the customer choose the option and selecting how long prior to the appointment the reminder email should be sent. The reminder email option is set on the **Settings > UI Setup** page (see the section on Appointment Settings for more details).
- **Cancellation Email** - sent when the customer or administrator cancels the appointment.

- **Custom Email** - allows you to send an email on an ad hoc basis. A custom email is sent only from the **Appointments List** page. On that page, you would locate the specific appointment or appointments that you wanted to send an email to, and then you will have the option to send Custom Email.
- **Follow-up Email** - sent some amount of time AFTER the appointment is taken. You have the option of selecting how long AFTER the appointment is taken the follow-up email should be sent. This email will be sent if you have checked the box "send follow up email" at the 'Follow-up Email' section. This is an email that would be used to send AFTER the event (e.g. for a survey or questionnaire).




On the left-hand side you can select the Confirmation Email, the Cancellation Email, the Reminder Email or the Custom Email. You can then select Subject Line, Subject for combined email, Header, Body, or Footer and view the text for these sections of your email template. You will have the option of editing the default text and using the toolbar to format your text.

The fields beginning with $ are Macro fields, and they will fill in with contact and appointment specific information.

$(C_FIRST) $(C_LAST) is the first and last name of the contact person -- the person logging into the scheduling site and booking the appointment. This name is captured when the contact person first registers.
$(TIME) is the time of the appointment booked
$(D_LONG) is the date of the appointment booked
$(D_LOCATION) Location of the Appointment (entered under the Calendar on the Appointments page) - useful for events with numerous dates, when the location(room) may be changed for some date, this macro could be used.

To view all the Macro options, select the **Insert Macro** button at the bottom of the page.

To edit (or view) the HTML, select the HTML icon (<>) on the toolbar.

You have the option to provide a support email address to receive emails when your customers reply to any of the three email types. Enter in an email address in the **Reply To Email Address** area and any time a parent selects "reply" to the confirmation, reminder, or cancellation emails the reply email will be sent to the ***reply to email address*** you specify. If you leave this blank, any replies will receive an automated email response.
The **Reply To Email Address** will apply to all events on your account.

**Additional**

The Subject for combined email is the subject line that will be used when multiple appointments have been booked, canceled, or modified. The text for each appointment transaction is "stacked" into one email. The system will use the Subject for combined email text in this "stacked" email subject line.

## Next Step

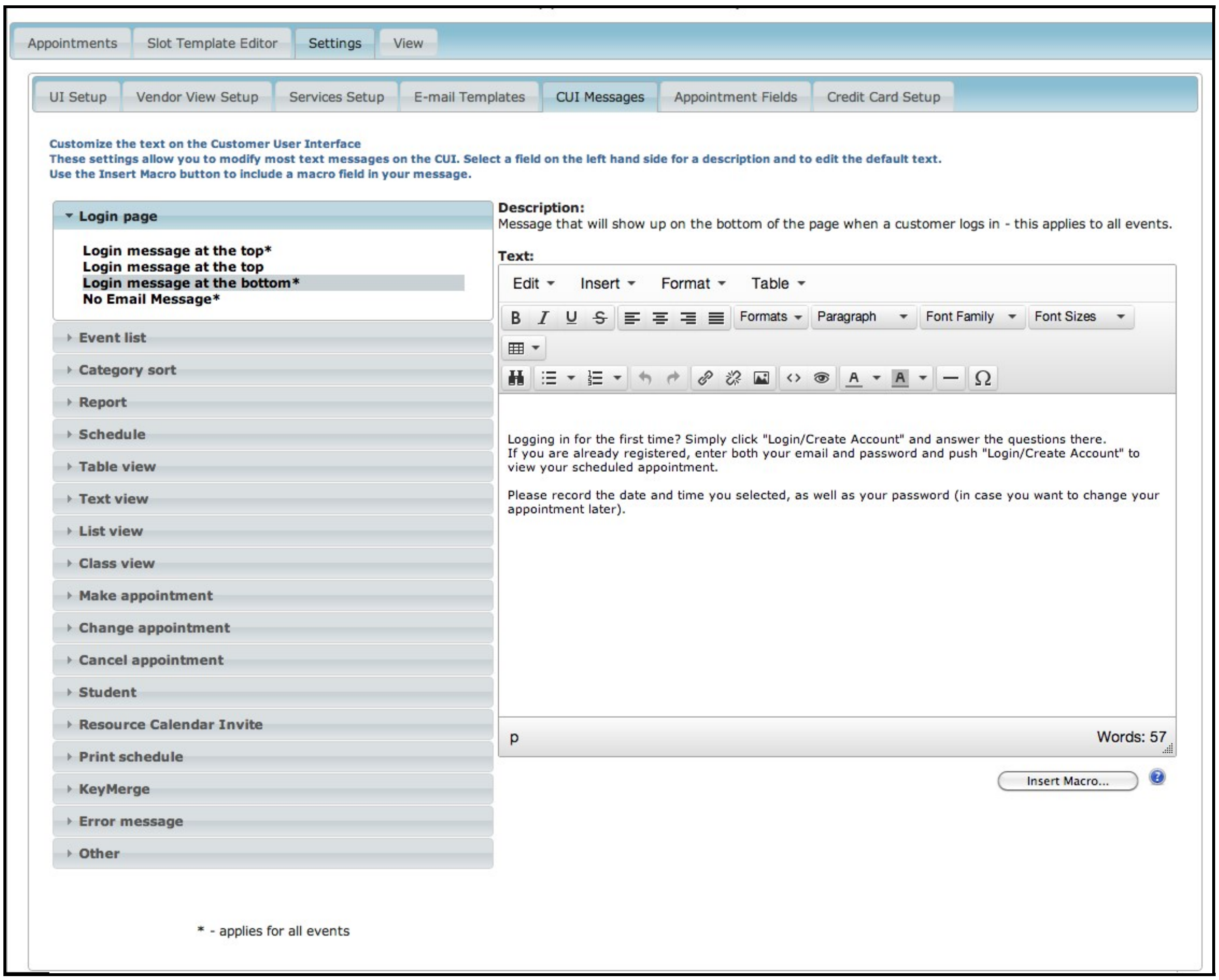
You are now ready to Configure CUI.

Home > Periodic Event Setup > Step 5: Settings > Configure CUI

# Configure CUI

The pickAtime system allows you to modify many of the display settings that your customers will see when booking appointments.

- From the Admin UI on the Events option on the dashboard. Then select your event from the list and click on the   button.
- Select the **Settings** tab and then select the **CUI Messages** tab.




- You can select any of the other labels on the left-hand side. The right-hand side will display the text that will show up on the CUI. The text on any of these labels can be changed.
- To edit the title on the login page for your scheduler, select Login page / Login message at the top* and edit

the text on the right-hand side.

- To add a logo to your scheduler, select Other / Account Logo*. Select the Insert drop-down and then select Insert image. Here you can enter the source URL for your image. If you only have a jpg for your image, you can email this to support@pickatime.com and request that we add this to your account.
- Macros can be placed in the text and the system will replace the macro with the corresponding text. For example "You are scheduling an appointment with <b>$(V_NAME) $(R_NAME)</b>, at <b>$(TIME) on $(D_SHORT)</b>,<br> for the <b>$(E_NAME)</b> event." is an example of the message that will be displayed on the appointment confirmation page. The "$(V_NAME)" macro will be replaced with your vendor account name when the system sends the page to the customer's browser.

Some of the macros you may want to use:

V_NAME Vendor Name

R_NAME Resource Name

E_NAME Event Name

TIME Time of Appointment

D_SHORT Date of Appointment (in short format)

LOCATION Location of Appointment (entered in the Event Setup section)

D_LOCATION Location of the Appointment (entered under the Calendar on the Appointments page) - useful for events with numerous dates, when the location(room) may be changed for some date, this macro could be used.

A complete list of the macros can be found by selecting the Insert Macro button at the bottom of the page.

You may also want to add a message at the top of the customer sign-in page. You would do so by selecting the string **Login message at the top**. Here you might add something such as “Health Screening Registration.”

To edit (or view) the HTML, select the HTML icon (<>) on the toolbar.

## Next Step

You are now ready to turn on your event.

Home > Periodic Event Setup > Step 6: Turn It On and Try It Out

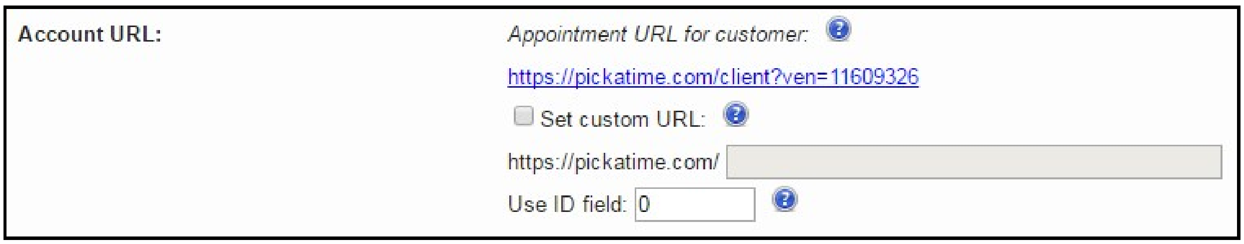
# Step 6: Turn It On and Try It Out

- From the Admin UI on the Events option on the dashboard. Then select your event from the list and click on the 

button.
- Select the **Settings** tab and then the **UI Setup** tab.
- To turn on the appointments so customers can use the website and schedule appointments, modify the days and times in the **Scheduler Availability** section. If you would like the CUI to always be on then leave the start

and end time set to midnight. If you would like it to be available only during certain times of the day then adjust the dates and time to your specific requirements.

View for yourself the appointment booking web page. The appointment URL is listed at the bottom of the **Business Setup** page under the **Global Setup** tab. To test out the system you can click on the URL or copy and paste this URL into another browser window and try out the site as if you were a customer. You can customize this URL by checking the box "Set custom URL" and entering in your preferred URL name in the white box.
The Appointment URL will change to reflect your selection, and the new URL will be available in approximately 5-10 minutes.




Once you have tested the scheduler and are satisfied that it is set up correctly, you are done and you can share the link with your clients.

Home > Periodic Event Setup > Advanced Setup Options

# Advanced Setup Options

Home > Periodic Event Setup > Advanced Setup Options > Collect Information from Participants

# Collect Information from Participants

There are two places where you can collect additional information from your customers. The first is when the customer logs in for the first time and creates an account -- this is contact specific information. Any information that you want to collect here is set up in the **Global Setup / Contacts Setup** page. The second place you can collect information is when the customer clicks on an appointment time. These fields are set up on your event pages in the **Settings / Appointments Fields** section.

Both pages work in a similar fashion.

Go either to the **Global Setup / Contacts Setup** page or the **Settings / Appointments Fields** event page.

Enter in your new field in the **Add New** box. For example, DOB, mm/dd/yy or Phone Number.

This field will then show up in the Available fields section. Use the < button to move it to the Included Fields section.

There are several options for each field that is in the included set.

**required for customers**

If this is checked, then during sign-up a red asterisk (*) will be next to the field and customers must input information on that line.

**required for admins**
If this is checked, then during sign-up a red asterisk (*) will be next to the field and administrators must input information on that line.

**hidden from customers**
This field would be hidden to your customers.

**ID Field**
**PW Field**
These fields are used when the vendor imports a list of customers to enable the customer to use the imported account. Using an ID field you can limit access to the event, by requiring your customer to provide a matching value in the ID field. PW field is similar to the ID field, except that the values that the customer types in will be hidden as password fields are. Please contact customer support for more information.

**repeat for each slot booked**
This type of field is used when you are allowing your participants to take multiple slots at the same time. For example, if you have a parent who would like to take three slots for flu shots, one for the parent and one for each of two children. You might then want to create a field labeled "Patient Name" or "Attendee Name." The parent booking the appointment would then need to fill in the name for each slot booked.

**Type column**
The type column will allow you to specify the type of field you have created. The options are Text, Num, Date, Choice, Header, and Sub-Header. Header and Sub-Header are informational fields, the participant will not be responding to a prompt.

**Create a question with preset answers**
To create a list of answers to your question (e.g. Yes, No) use the drop-down under the Type column and select Choice. You will then see a question editor where you can fill in your first answer in the entry box below your question. Click on Add New to create more answers.

You have the option of a drop-down list, radio boxes, or check boxes for your responses.

Use the <> option to rearrange your responses.

You can follow directions on the "Contact/Appointment field with questions" page to create a question with preset answers.

## Reporting

To view your collected appointment fields in the Reporting section, click on the Additional report fields link, select Appointment fields and check the box next to each field you would like to add to your report. Click on the **Save Report Settings** button to save these selections on your report.

To view your collected contact fields in the Reporting section, click on the Contact report fields link, select Appointment fields and check the box next to each field you would like to add to your report. Click on the **Save Report Settings** button to save these selections on your report.

**IMPORTANT NOTES:**

Fields you create in the **Contacts Setup** page will be collected when the participant FIRST creates their account.

Fields you create in the **Appointment Fields** page will be collected when the participant clicks on a time slot.

First Name, Last Name, and E-Mail address are collected when the participant registers.

Home > Periodic Event Setup > Advanced Setup Options > Allowing Participants to take multiple slots

# Allowing Participants to take multiple slots

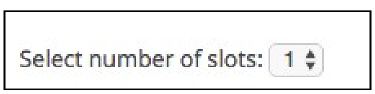
### Allowing customers to take multiple slots

This would be used when you want to allow one login to take multiple appointment slots at the same time.

Some examples might be:

- a parent booking flu shot appointments for three children
- a parent booking a school tour for mom, dad, & child or siblings
- a supervisor registering multiple team members for an event.

To enable this feature go to the Settings / UI Setup page for your event and select "allow customers to take multiple slots." On the scheduling page, this will display a pull-down above your slots, where the customer can select the number of slots they wish to book. They will never be able to book more than the number available at any given time.  See below for an example:




The text ('Select number of slots') can be edited on the Settings / CUI Messages page under Schedule / Select number of slots message.

You will most likely also want to capture information on each slot this is being booked -- such as the name of the person participating or attending. You would do this by going into the Settings / Appointment Fields page for your event, and creating new fields you would like filled out for each appointment. An example might be "Participant Name."

Check the box under the column for "repeat for each slot booked" to create a repeating prompt. For example, if a participant selects 2 slots, and you have created a repeating prompt labeled Participant Name, they will be prompted to fill out this field for each slot. See example below:

## Customizing your Email

When you select the option of allowing your customers to take multiple slots, you will want to adjust your email templates. When multiple appointments are created at the same time, we send only one email. The email will contain one header section, one footer section, and then a body section for each appointment made. This means that any text you ***do not*** want repeated you should put in the header or the footer, not the body.

For example, if you would like your email to read something such as:

> Dear Joan Smith,
>
> Thank you for scheduling the following appointment(s):
>
> John Smith at 2:00 on July 15, 2012
> Sue Smith at 2:00 on July 15, 2012
> Billy Smith at 2:00 on July 15, 2012
>
> Please arrive early to find parking. We look forward to seeing you.

On the Settings / E-Mail Templates page you would enter your text as follows:

> **Header:**
> Dear $(C_FIRST) $(C_LAST),
>
> Thank you for scheduling the following appointment(s):
>
> **Body:**
> $(AF_PARTICIPANT_NAME) at $(TIME) on $(D_LONG)
>
> **Footer:**
> Please arrive 15 minutes early to find parking. We look forward to seeing you

The fields beginning with $ are Macro fields, and they will fill in with appointment specific information.

$(C_FIRST) $(C_LAST) is the first and last name of the contact person -- the person logging into the scheduling site and booking the appointment. This name is captured when the contact person first registers.
$(TIME) is the time of the appointment booked
$(D_LONG) is the date of the appointment booked
$(AF_PARTICIPANT_NAME) is the name of the participant who will be taking the appointment slot. This name will be entered by the contact person when the appointment is booked. This field was created on the Settings / Appointments Fields page for your event by adding in a new field called Participant Name.