

# EASYAPPOINTMENTS TAKE APPOINTMENTS ANY TIME ON YOUR APP!



## EASY APPOINTMENTS

V2.2.0

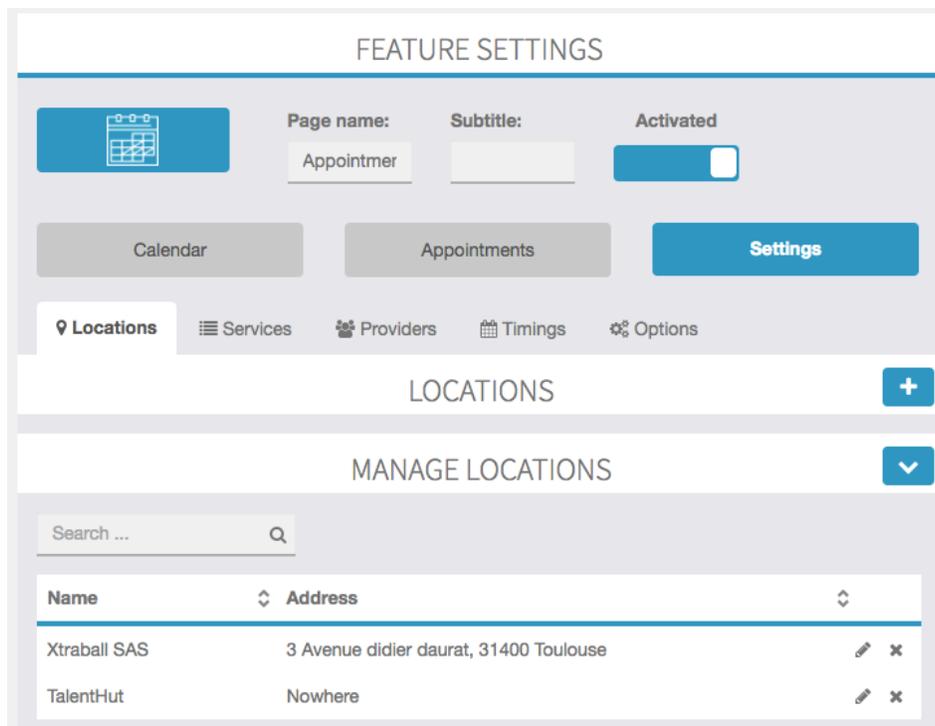
## 1. WELCOME

The **Easy Appointments** Siberian CMS module will easily allow you add an appointments booking engine to your App. The App manager will be able to create multiple stores, categories, services and providers. It's also possible to define store opening and closing times and create a specific schedule for the providers. Lastly, so that the App Manager can also take appointments over the phone and from walk-ins, through the web front-end interface, it's also possible to add appointments manually. The **Easy Appointments** booking engine also send push reminders before each appointment. The default reminder is set for 1hr before the appointment but the user is free to adjust according to the individual needs. This module requires the Individual Push Notification Module in order for the send the alert reminders. The **Easy Appointments** module has been connected to the **Progressive Loyalty Card** module with release 1.3. This means that loyalty points can be accumulated automatically with every booking that is made. Please note that the **Progressive Loyalty Card** module needs to be installed and properly configured before you assign loyalty points to the services.

## 2. SETUP

Once you've installed the zip file through the Siberian CMS back-office, the setup of the **Easy Appointments** Module is comprised of 5 steps. You'll need to access the [Settings](#) tab (figure 2.1) in order to begin this process.

Figure 2.1 - Settings

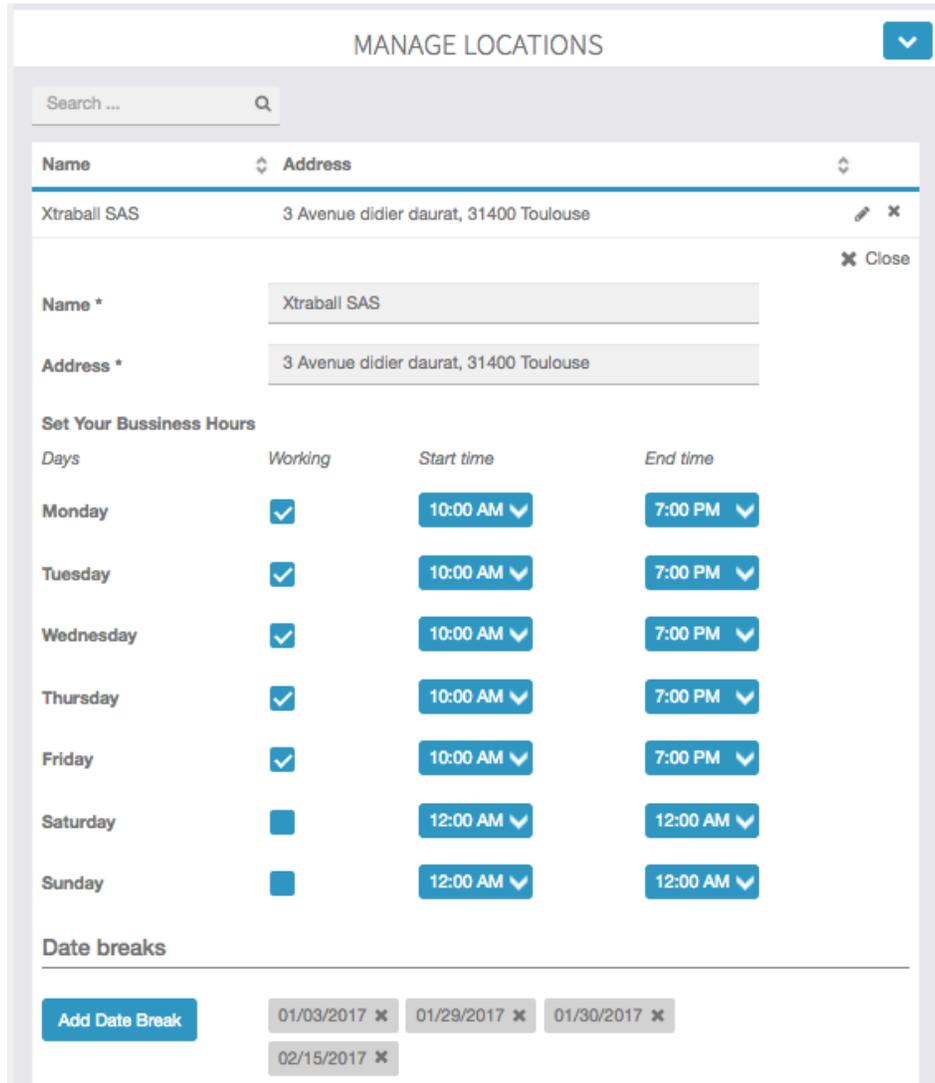


### A. LOCATION

The first step is to create the location for your retail outlet (figure 2.A.1) You can have more than one outlet on each App. If you only have 1 store location, the user will not be presented with the

store selection during the booking process. You'll need to add the Name of the location, the address, and set the business working hours. If you close for lunch, you won't define it here. When you add the providers, you'll be able to define the lunch period separately for each one of them. Lastly, you'll be able to define if the store is closed on a specific day, like December 25, and save.

Figure 2.A.1 - Locations



The screenshot shows the 'MANAGE LOCATIONS' interface. At the top, there is a search bar and a dropdown menu. Below that, a table lists the location 'Xtraball SAS' with the address '3 Avenue didier daurat, 31400 Toulouse'. A 'Close' button is visible next to the location name. Below the table, there is a form to edit the location details. The 'Name' field contains 'Xtraball SAS' and the 'Address' field contains '3 Avenue didier daurat, 31400 Toulouse'. Underneath, there is a section titled 'Set Your Business Hours' with a table of days, working status, start time, and end time. The days are Monday through Sunday. Monday through Friday are marked as working with a checkmark and have a start time of 10:00 AM and an end time of 7:00 PM. Saturday and Sunday are marked as not working with a blue square and have a start time of 12:00 AM and an end time of 12:00 AM. Below this table, there is a section titled 'Date breaks' with an 'Add Date Break' button and four date break entries: 01/03/2017, 01/29/2017, 01/30/2017, and 02/15/2017, each with a close button.

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

Date breaks

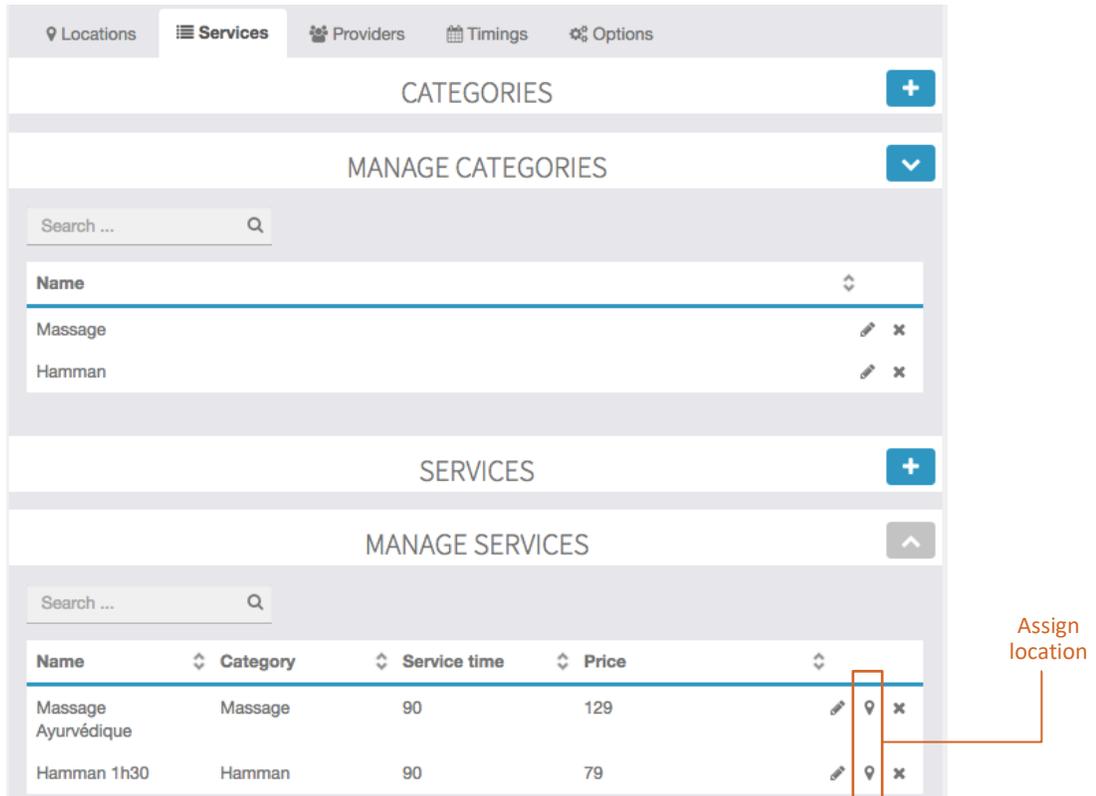
Add Date Break

01/03/2017 ✕ 01/29/2017 ✕ 01/30/2017 ✕  
02/15/2017 ✕

## A. SERVICE & CATEGORIES

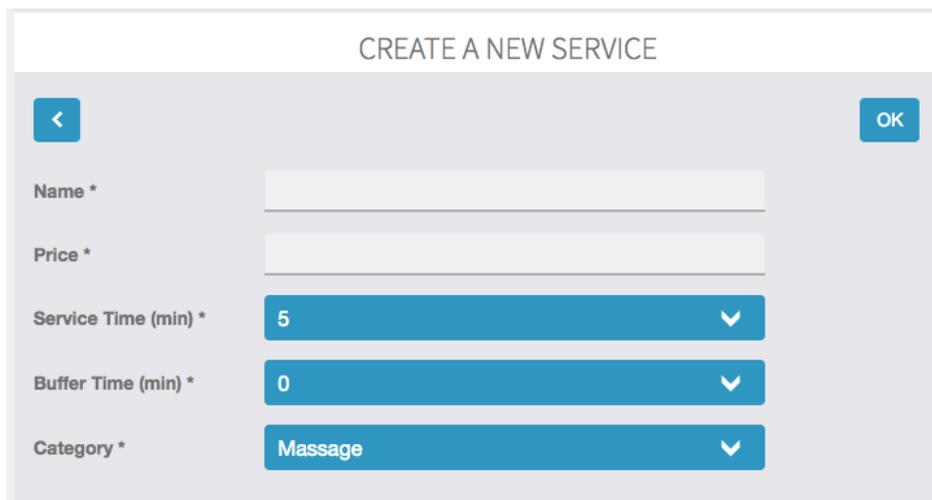
The second step is to create categories of services (figure 2.B.1). This will allow you to categorize the services and to show the user a more organized list of the services that are provided. If you only have 1 category, the category tab will not be shown during the booking process. The user will be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

Figure 2.B.1 – Services



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

Figure 2.B.1 – Adding a service



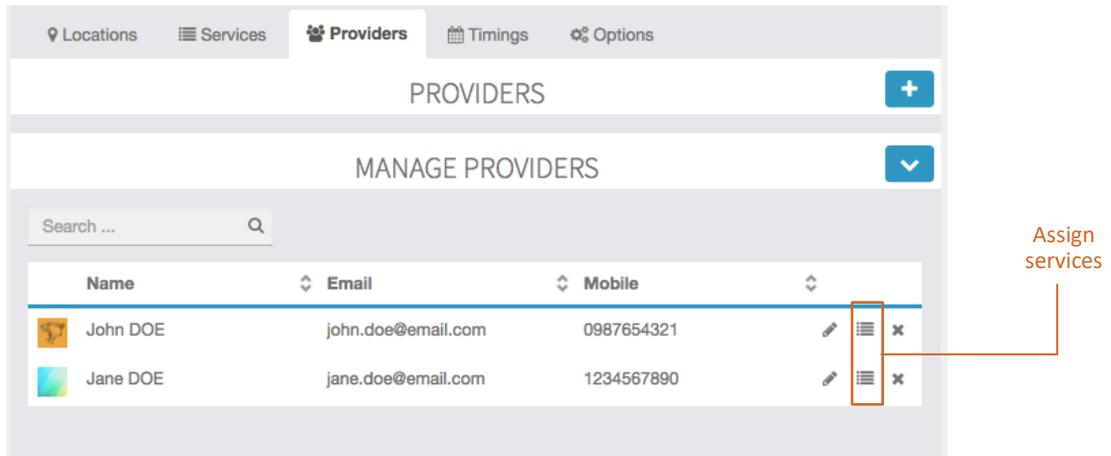
Once you've saved the service, you'll need to define where that service is available. It could be there are multiple stores and the service is only available at one location (figure 2.B.1). You'll

need to repeat this step for all the services that you create.

## B. PROVIDERS

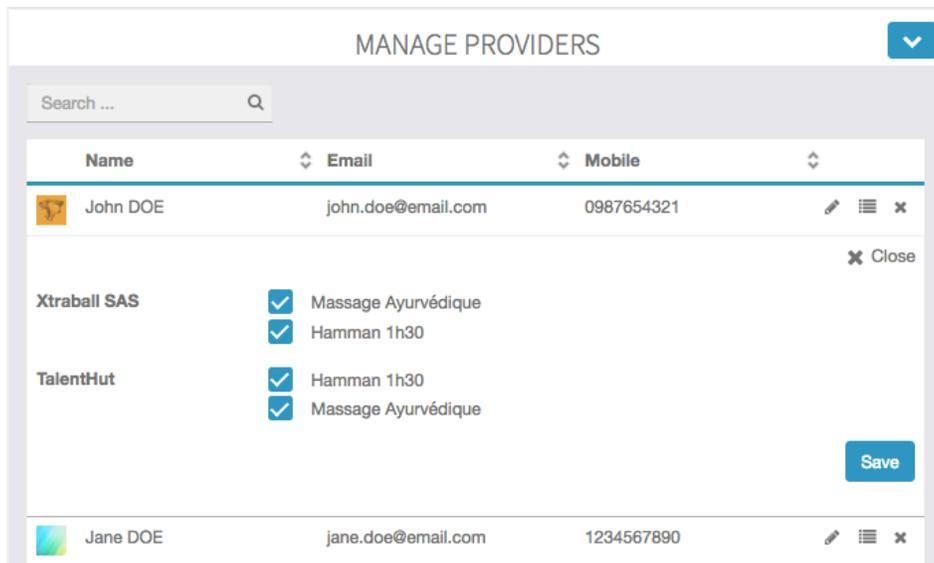
The first step is to add the providers and to associate the providers to the locations and services (figure 2.C.1) You'll need to create a name for the provider, add a phone number and an email address. Optionally, you can add a description for each provider. This is enable on the App an information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

Figure 2.C.1 – Providers



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

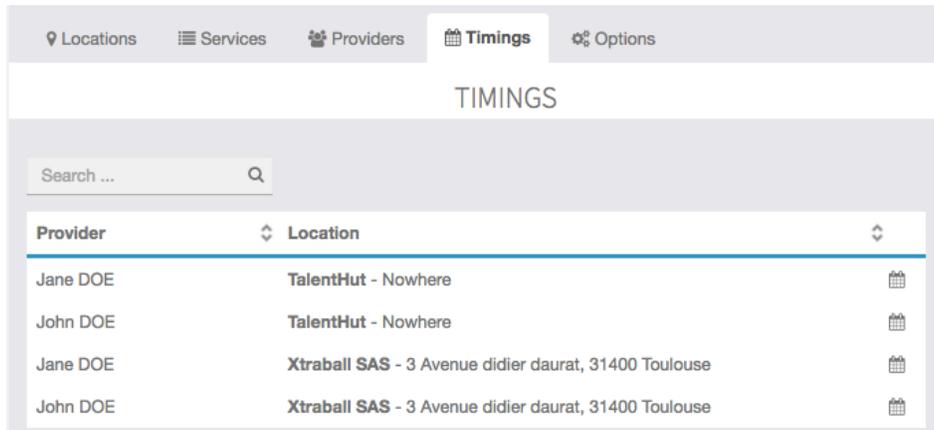
Figure 2.C.2 – Assign services to a provider



### C. TIMINGS

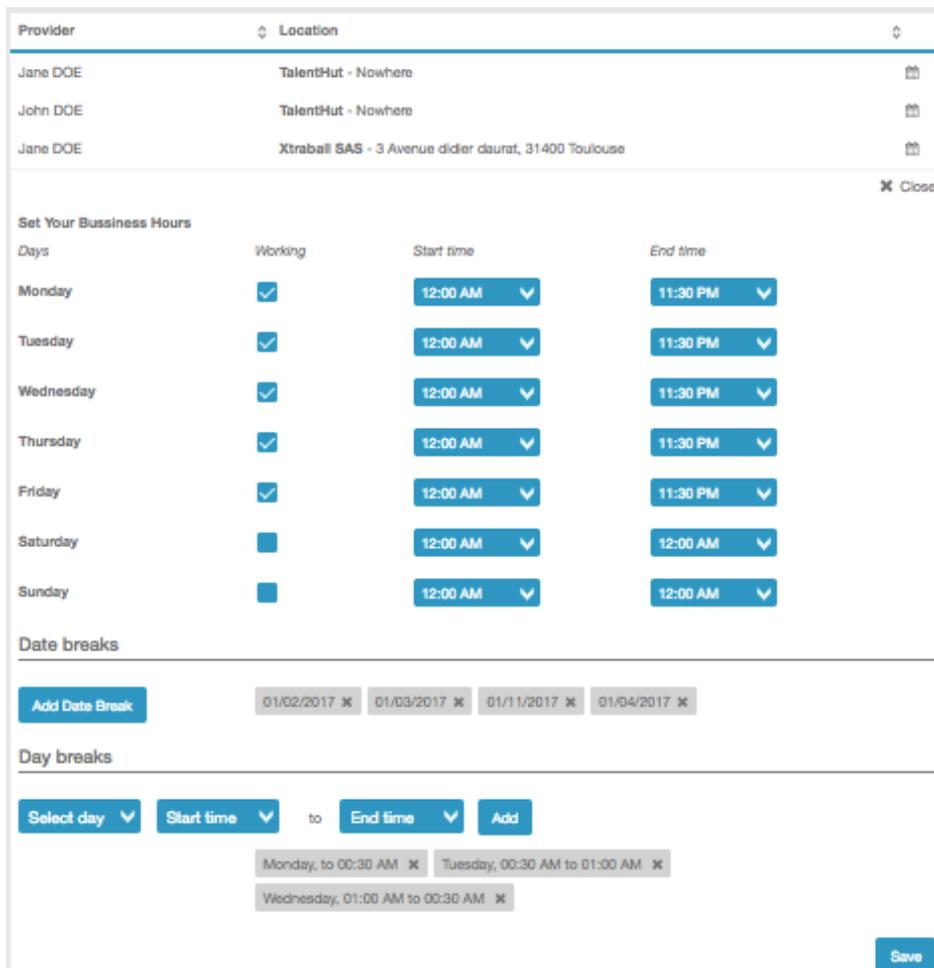
The last step is to define when the provider will be available to work (figure 2.D.1). In case the provider works are more than one location, you'll need to define the timings for each location.

Figure 2.D.1 – Timings



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

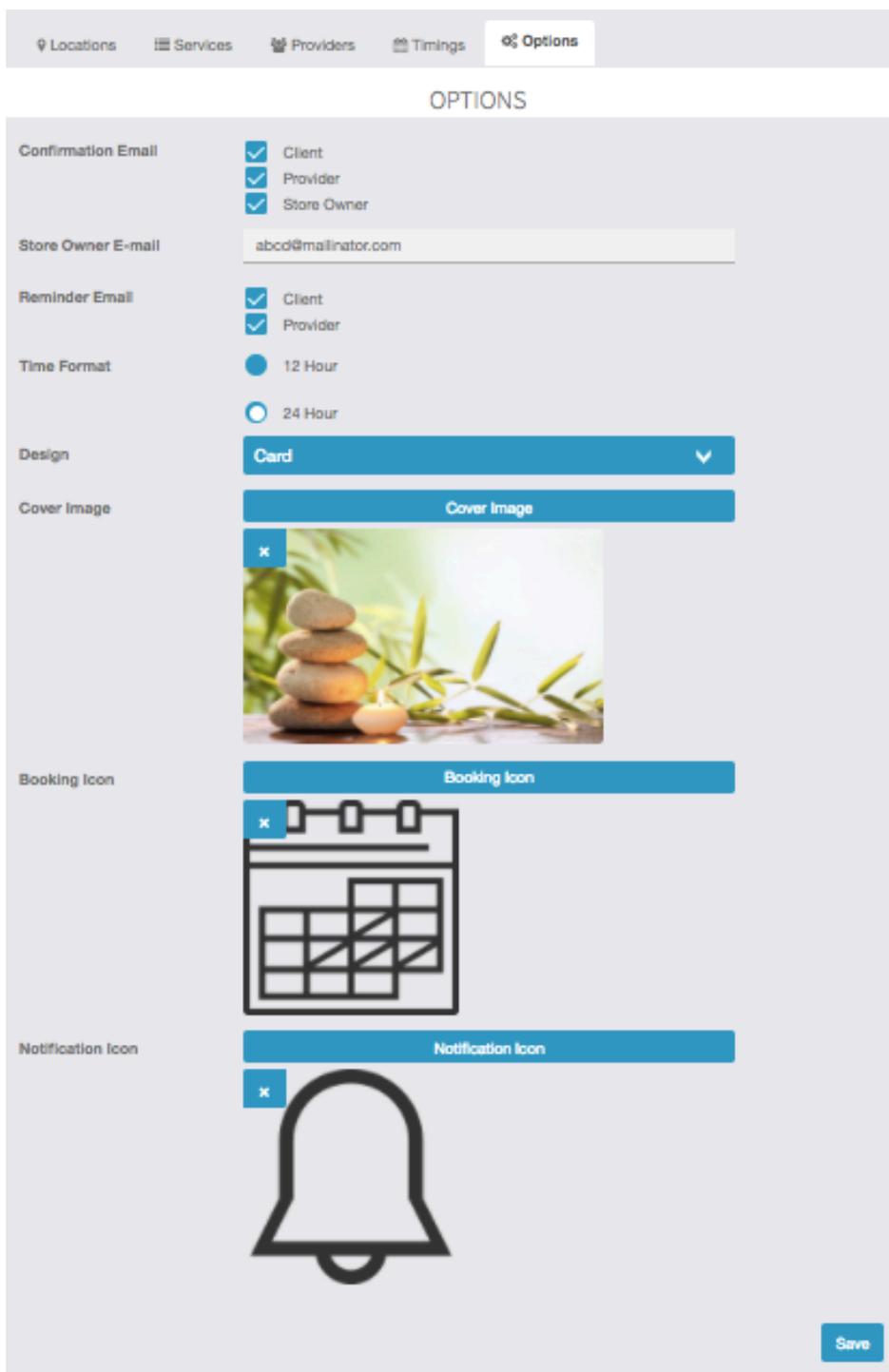
Figure 2.D.2 – Adding timings and breaks



## E. OPTIONS

From the options menu you'll be able to adjust some module design options and customize the icons used (figure 2.E.1). You'll get to decide who gets emails when bookings are made and also if you want to send reminder emails in addition to the push notification alerts.

Figure 2.E.1 – Options



Locations Services Providers Timings **Options**

### OPTIONS

Confirmation Email  Client  
 Provider  
 Store Owner

Store Owner E-mail

Reminder Email  Client  
 Provider

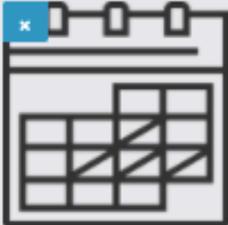
Time Format  12 Hour  
 24 Hour

Design **Card** ▾

Cover Image **Cover Image**



Booking Icon **Booking Icon**



Notification Icon **Notification Icon**



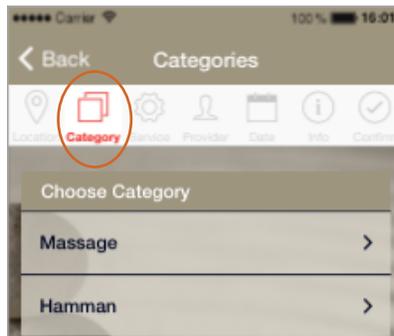
**Save**

## F. CUSTOMIZATION

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

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

Figure 2.F.1 - Active icon



## 3. MANAGING APPOINTMENTS

Appointments can be managed from the Calendar interface (figures 3.1 and 3.2). The store manager will need to select the location and provider that needs to be managed. Once that is selected, the calendar can be loaded with that criteria. Should the store manager need to change location or provider, it can be done using the pull-down menus. The store manager can obtain a view of the availability of all providers by switching to a daily calendar view. That can be attained by selecting All Providers from the pull down menu. The calendar view will switch to daily automatically.

Figure 3.1 - Loading the calendar

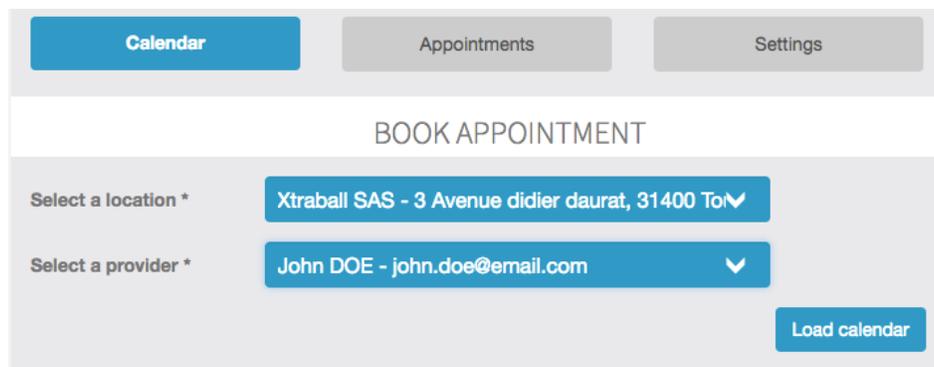
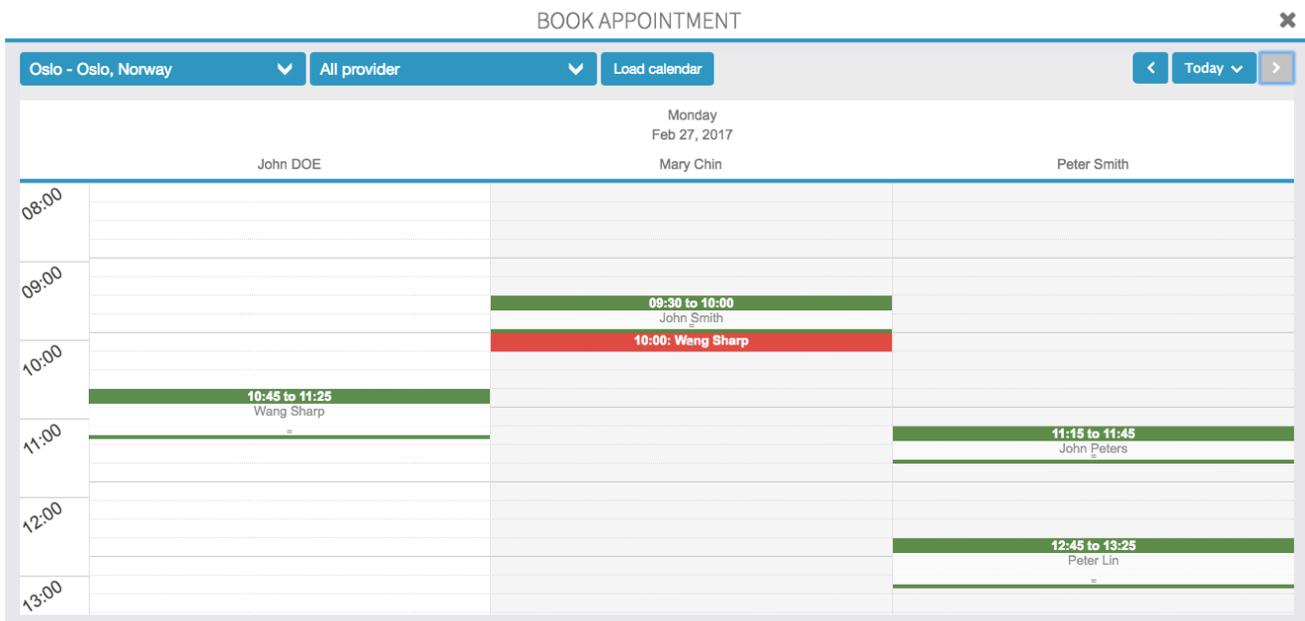


Figure 3.2 – Weekly Calendar View



Figure 3.2 – Daily Calendar View

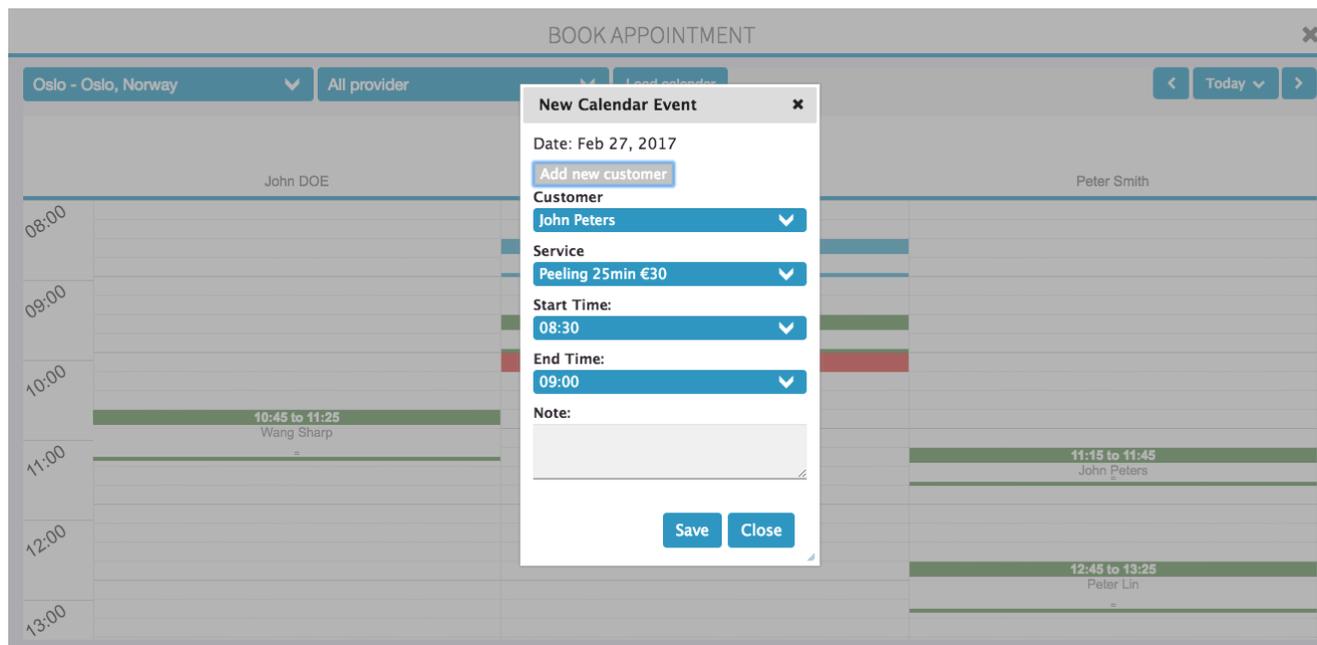


## A. ADDING AN APPOINTMENT

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

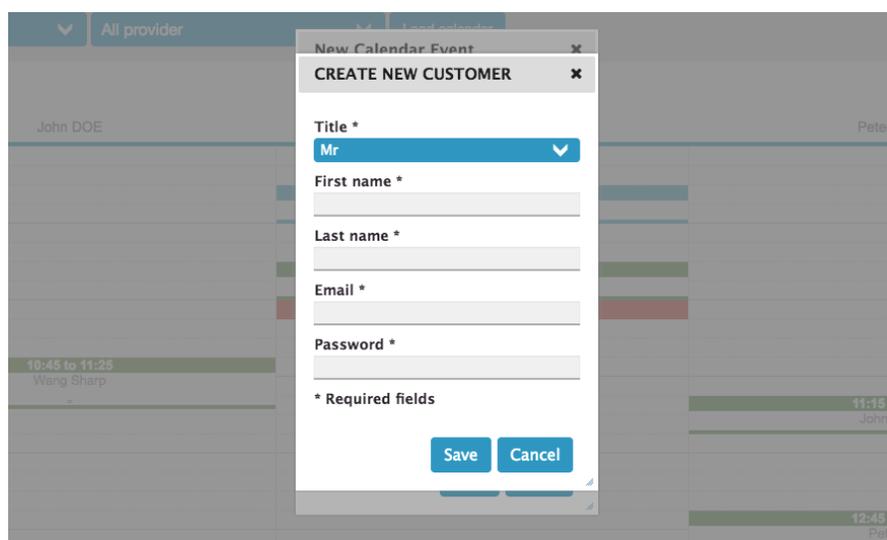
requirements or details, these can be added to the Notes field. Once the new appointment is saved, a confirmation email will be sent to the customer and to the provider.

Figure 3.A.1 – Adding an appointment



If the store owner is creating an appointment for a new customer, a new customer account can be created without leaving the calendar (figure 3.A.2). An email will be sent to the customer with the email and password so that the App can be accessed.

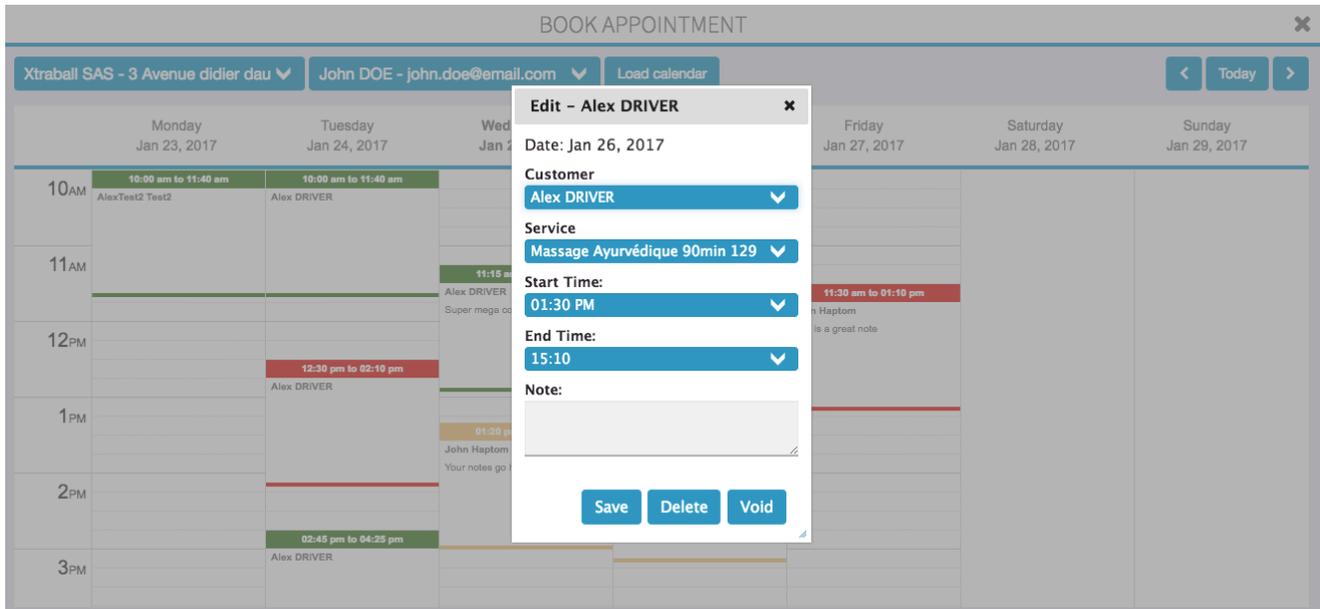
Figure 3.A.2 – Creating new customer



## B. CANCELLING AN APPOINTMENT

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

Figure 3.B.1 – Voiding an appointment



## C. EDITING AN APPOINTMENT

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

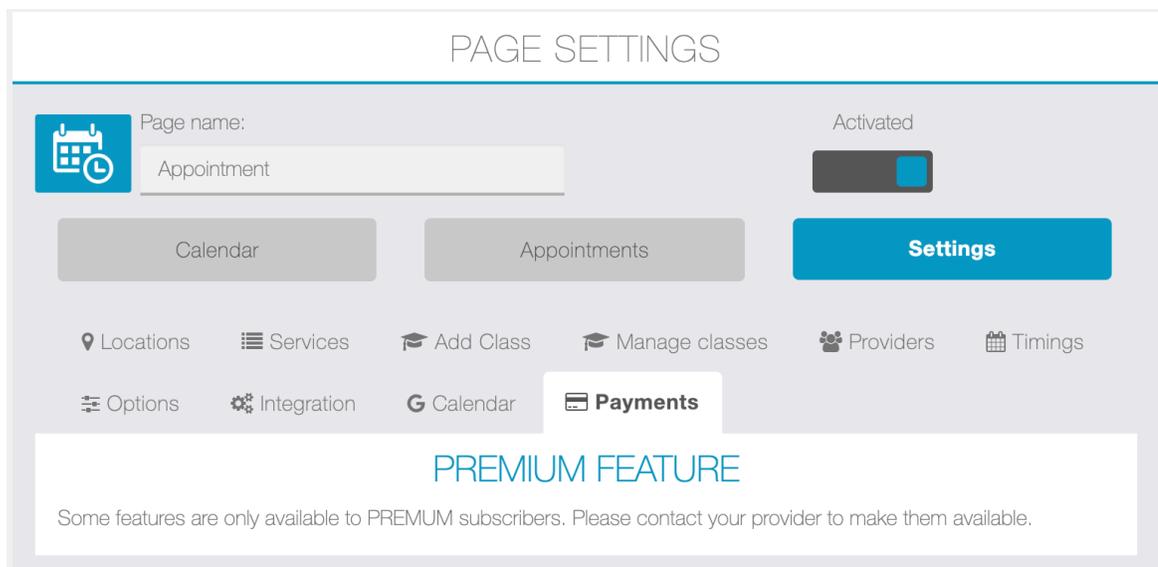
## 4. PREMIUM FEATURES

The **Easy Appointments PREMIUM** monthly subscription will allow you to charge your customers more for the use of the EasyAppointments module as it extends its power by allowing class bookings, Google Calendar Sync and partial/full payment for appointments.

### A. SETUP

The **EasyAppointments PREMIUM** subscription requires no installation. It requires only that you already have the EasyAppointments Base module installed on your SiberianCMS and that you activate your subscription key. The PREMIUM features of the EasyAppointments module will show you an upgrade message if the license key is not activated for your App (figure 4.A.1).

Figure 4.A.1 – Appointments activation page



Once you purchase the EasyAppointments PREMIUM subscription you'll need to activate it from your Siberian backoffice. The subscription key that you received in the purchase email will need to be added under Manage > Modules > Appointment Activation Key (figure 4.A.2).

From the Appointments Activation Key page, you'll also be able to define which App you want to allocate your subscription(s). If one of your customers don't pay for the EasyAppointments PREMIUM subscription, you can deactivate it from this page.

Figure 4.A.2 – Appointments activation page

## 🔑 Appointment Module Activation Key

### Add/Edit Key

### List of your applications Which have Appointment

Search   Shows applications which have Appointment Premium features activated.

Id	Name	Bundle Id	Actions
8	Module Testing	com.easyapp.app00x.ios58b3ef5c862c4	<input checked="" type="checkbox"/>
28	Spa Advanced	com.easyapp.app00x.ios59c0fe0415e44	<input checked="" type="checkbox"/>

## 5. PAYMENTS (PREMIUM FEATURE)

Once you purchase your PREMIUM subscription and activate it as explained in the previous step, you'll need to install the [Enterprise Payments](#) module that you can download from the Siberian marketplace. This module will need to be added to every App that has the EasyAppointments module. Once you add this module to the App, make sure you deactivate it. The module doesn't need to be activated to work and deactivating it guarantees the button for this module will be removed from the App (figure 5.1).

Figure 5.1 – Enterprise Payment module

### PAGE SETTINGS

Page name:   Activated

**Payment Method** Transactions Setting

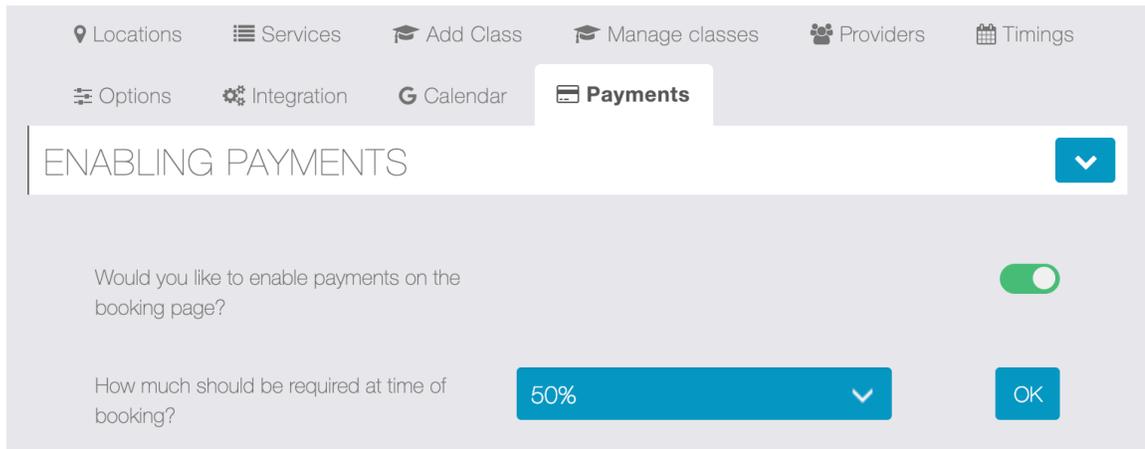
MANAGE

Search:

Method	Status	
Bank Transfer	<input checked="" type="checkbox"/> On	<input type="button" value="edit"/>
Cash	<input checked="" type="checkbox"/> On	

The following setup is to activate the payments within the EasyAppointments module (figure 5.2). You'll need to define what is the amount you want to require at time of booking. You can select from 10% to full payment. Please note that, in order for the payments to work, you'll make sure you have added the prices to each service. You should also verification that your cancellation policy is aligned with the payments.

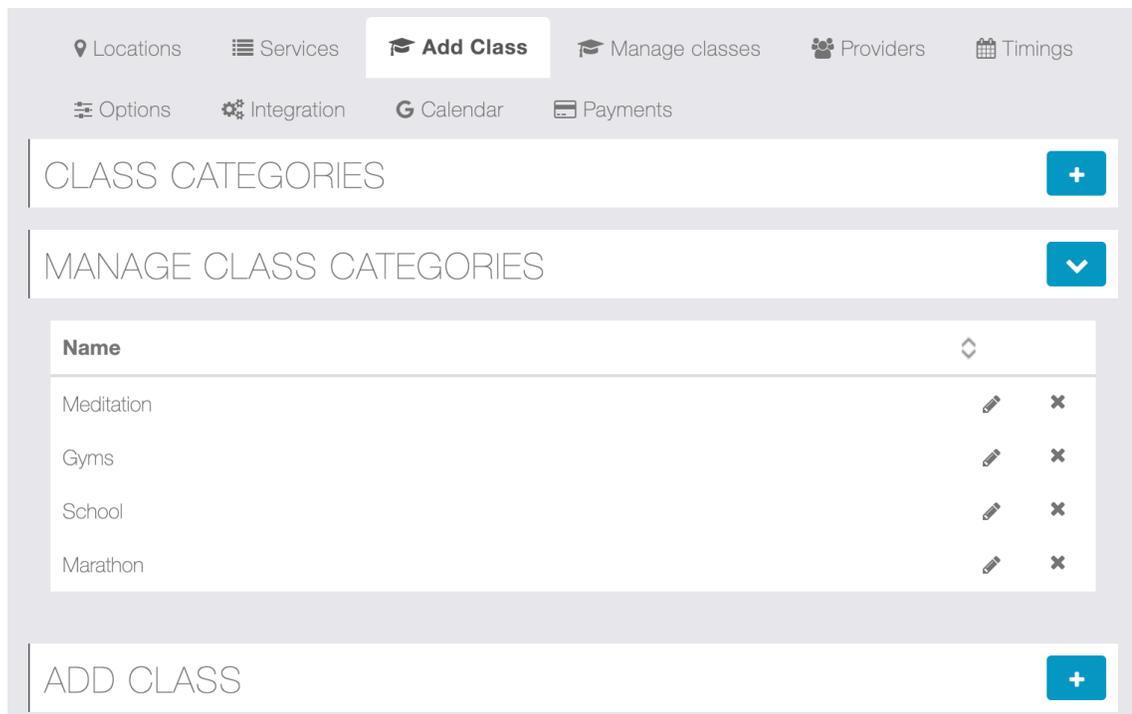
Figure 5.2 – EasyAppointments payment activation page



## 6. CLASSES AND WORKSHOPS (PREMIUM FEATURE)

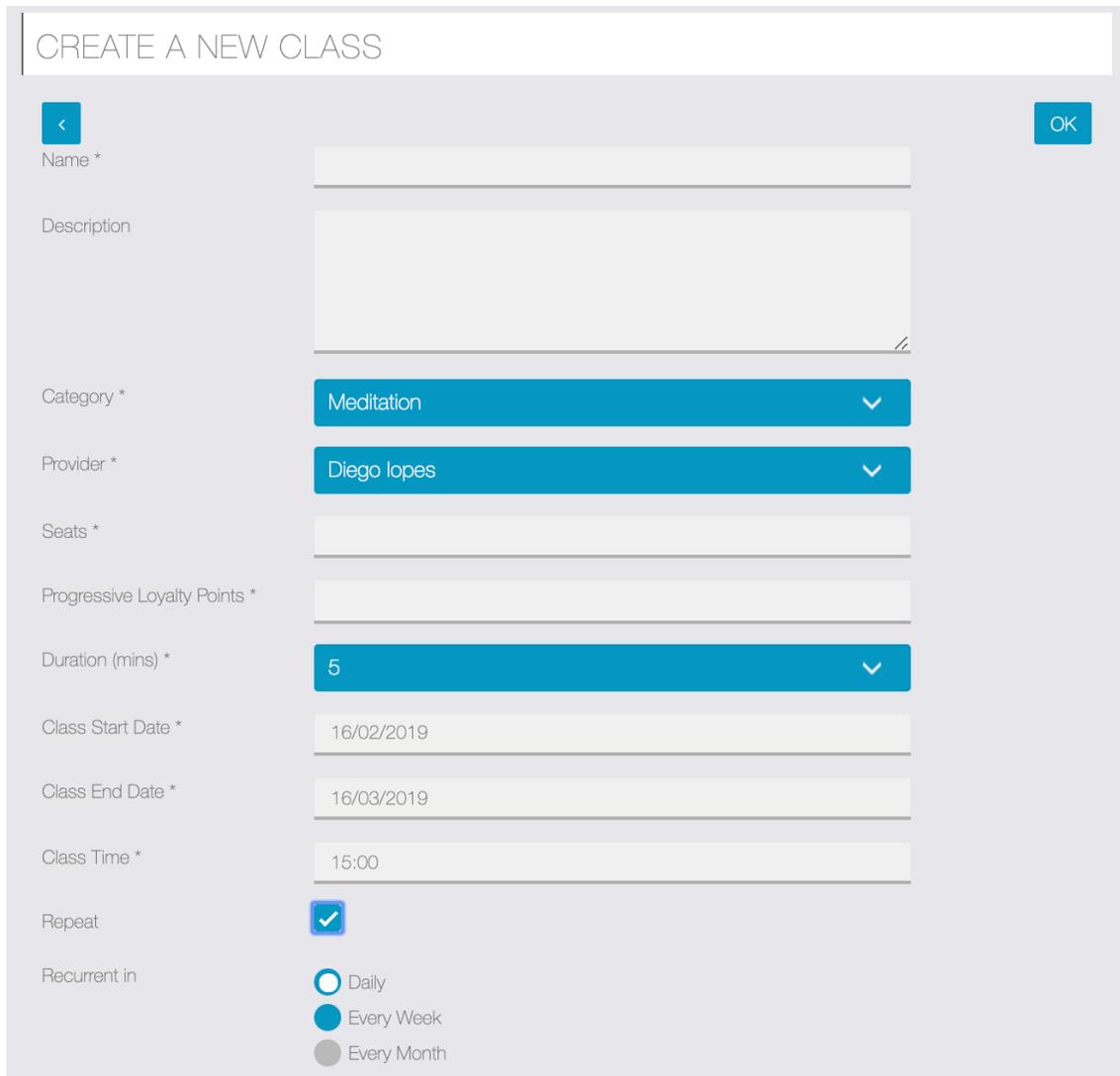
In order to use this feature, you'll need the PREMIUM subscription. Once you activate the PREMIUM subscription, you'll see the Add Class page (figure 6.1). The first step is to add class/workshop types/categories.

Figure 6.1 – Add Class page



Once you add the types/categories of classes or workshops, by pressing Add Class button seen above, you can begin adding your classes (figure 6.2).

Figure 6.2 – Create a new class



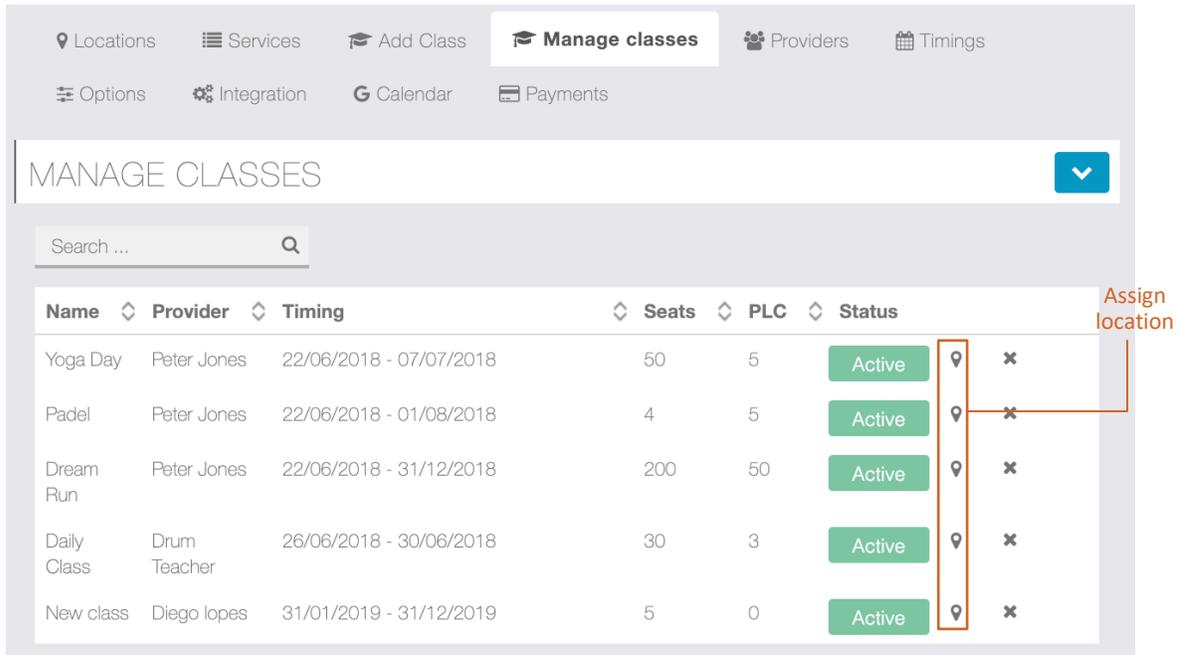
The screenshot shows a form titled "CREATE A NEW CLASS" with a back arrow on the left and an "OK" button on the right. The form contains the following fields and options:

- Name \* (text input)
- Description (text area)
- Category \* (dropdown menu, selected: Meditation)
- Provider \* (dropdown menu, selected: Diego lopes)
- Seats \* (text input)
- Progressive Loyalty Points \* (text input)
- Duration (mins) \* (dropdown menu, selected: 5)
- Class Start Date \* (text input, value: 16/02/2019)
- Class End Date \* (text input, value: 16/03/2019)
- Class Time \* (text input, value: 15:00)
- Repeat (checkbox, checked)
- Recurrent in (radio buttons):
  - Daily (unselected)
  - Every Week (selected)
  - Every Month (unselected)

If this is a recurrent class/workshop, you'll be able to define the frequency by clicking on the Repeat button (this button will be only be revealed once you add an end date). Please note that the end date should be the date that the last recurrent class ends. For example, if this class is offer for 1 month every day, you'll need to define the end date as 30 days from today.

The next step is to go to the Manage Classes tab and assign the location where these classes will be available at (figure 6.3). If you do not assign the classes to any location, they will not appear on the user interface.

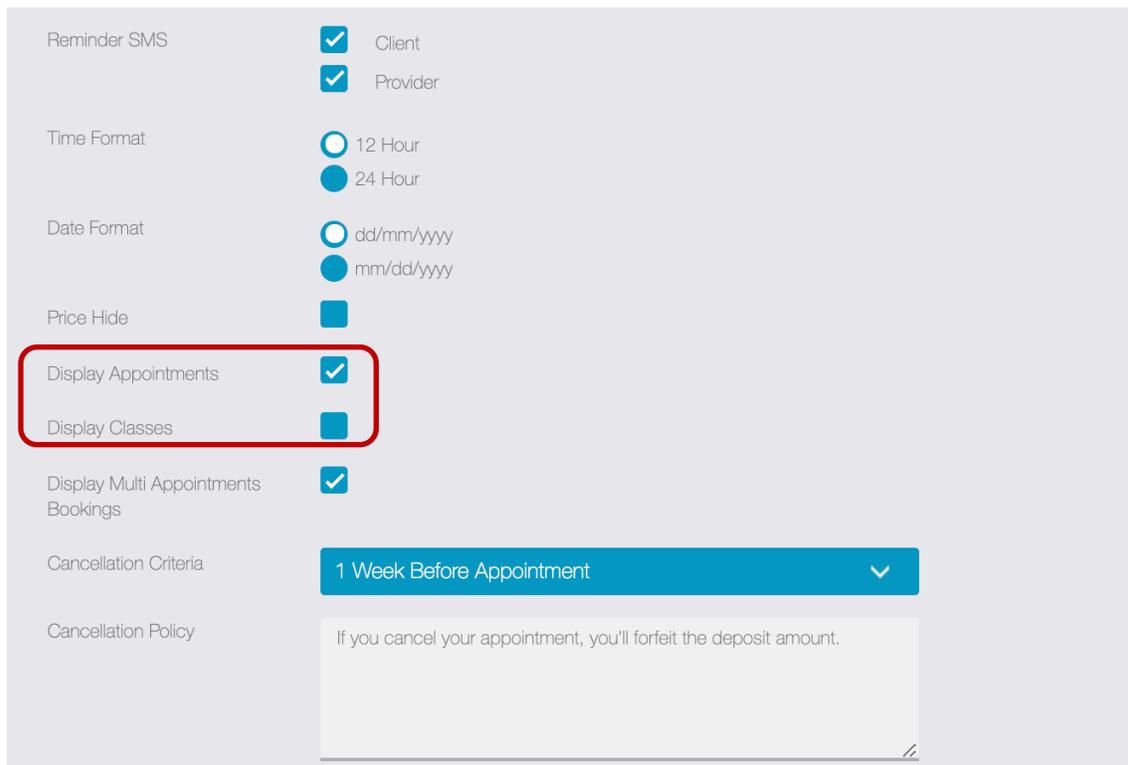
Figure 6.3 – Manage Classes



Name	Provider	Timing	Seats	PLC	Status	Location	Assign location
Yoga Day	Peter Jones	22/06/2018 - 07/07/2018	50	5	Active	📍	✖
Padel	Peter Jones	22/06/2018 - 01/08/2018	4	5	Active	📍	✖
Dream Run	Peter Jones	22/06/2018 - 31/12/2018	200	50	Active	📍	✖
Daily Class	Drum Teacher	26/06/2018 - 30/06/2018	30	3	Active	📍	✖
New class	Diego lopes	31/01/2019 - 31/12/2019	5	0	Active	📍	✖

The last step is to ensure that the classes are enabled on the user front-end interface. You can do this by activating it on the Options Tab (figure 6.4). By default, only Appointments are activated on the user interface, so you'll need to activate classes in order for them to display (figure 6.5).

Figure 6.4 – Options Tab



Reminder SMS  Client  
 Provider

Time Format  12 Hour  
 24 Hour

Date Format  dd/mm/yyyy  
 mm/dd/yyyy

Price Hide

**Display Appointments**

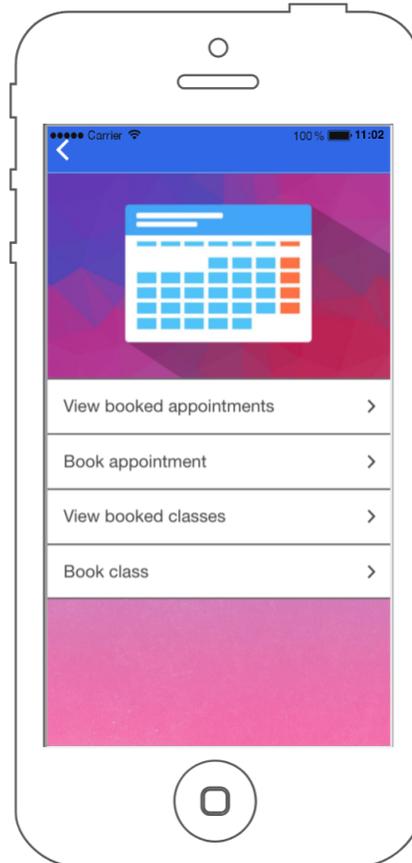
Display Classes

Display Multi Appointments Bookings

Cancellation Criteria

Cancellation Policy

Figure 6.5 – User interface with Classes booking active



## 7. GOOGLE SYNC (PREMIUM FEATURE)

With this feature, you'll be able to synchronize the Provider's appointment schedule with his own Google Calendar. Detailed instructions on how to set it up will be added shortly. Meanwhile please contact our support for assistance.

## 8. PROGRESSIVE LOYALTY CARD MODULE

With release 1.3 the **Easy Appointments** module has been connected to the **Progressive Loyalty Card** and, as such, it's possible to accumulated loyalty points automatically. The loyalty points need to be configured for each service separately. If you don't want any points to be credited, you'll need to set the loyalty points to 0. Once the loyalty points have been assigned, when the customer makes a booking the points are not credited immediately. The system waits until the end of the booking time in order credit the loyalty points automatically. If the customer doesn't show up for the appointment, you'll need to cancel it so that points are not accrued. If the appointments are not cancelled (or deleted), the loyalty points will be accrued on the **Progressive Loyalty Card**. Please note that before the points are credited automatically, the **Progressive Loyalty Card** module needs to be installed and properly configured, including loyalty card and rewards creation.

Figure 4.1 – Loyalty points

Name	Category	Service time	Price	Points	
Default service	Default category	30	19.95	0	  

## 9. USER FRONTEND INTERFACE

Below you can find the user frontend interface screens.

Figure 5.1 – booking process

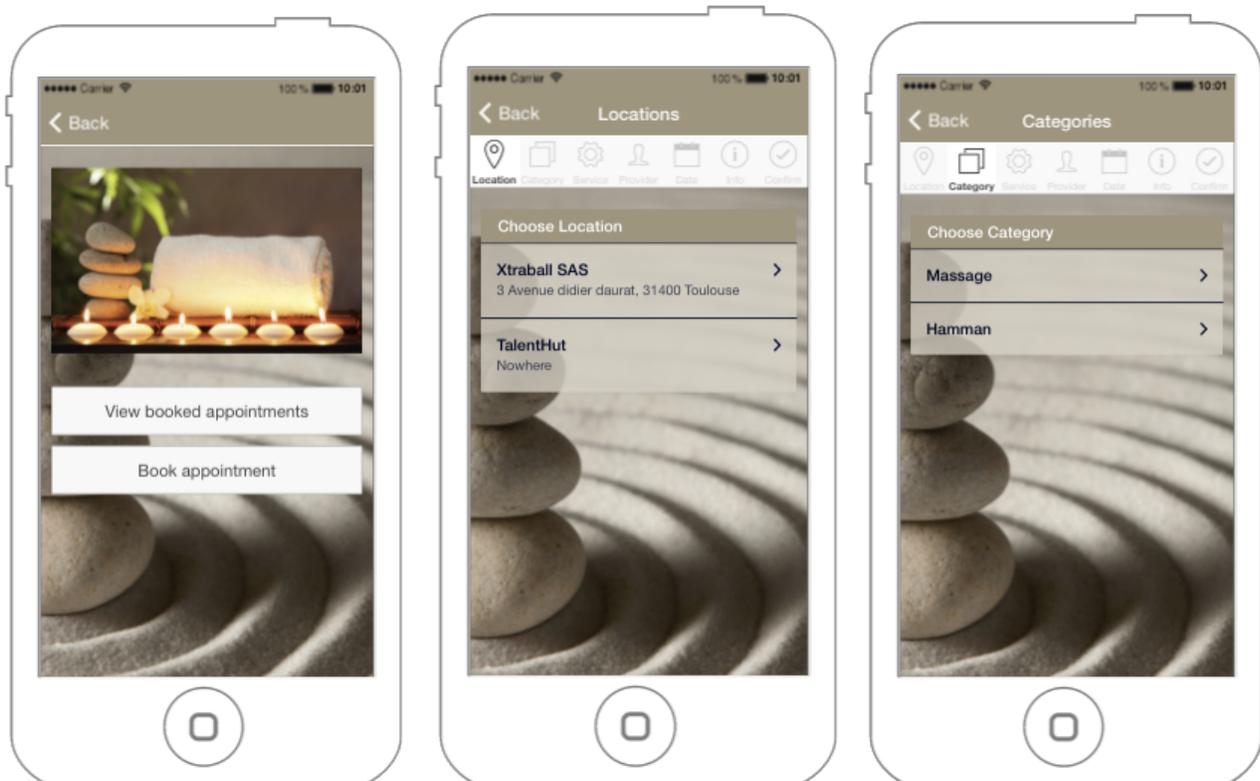


Figure 4.1 – booking process (continued)

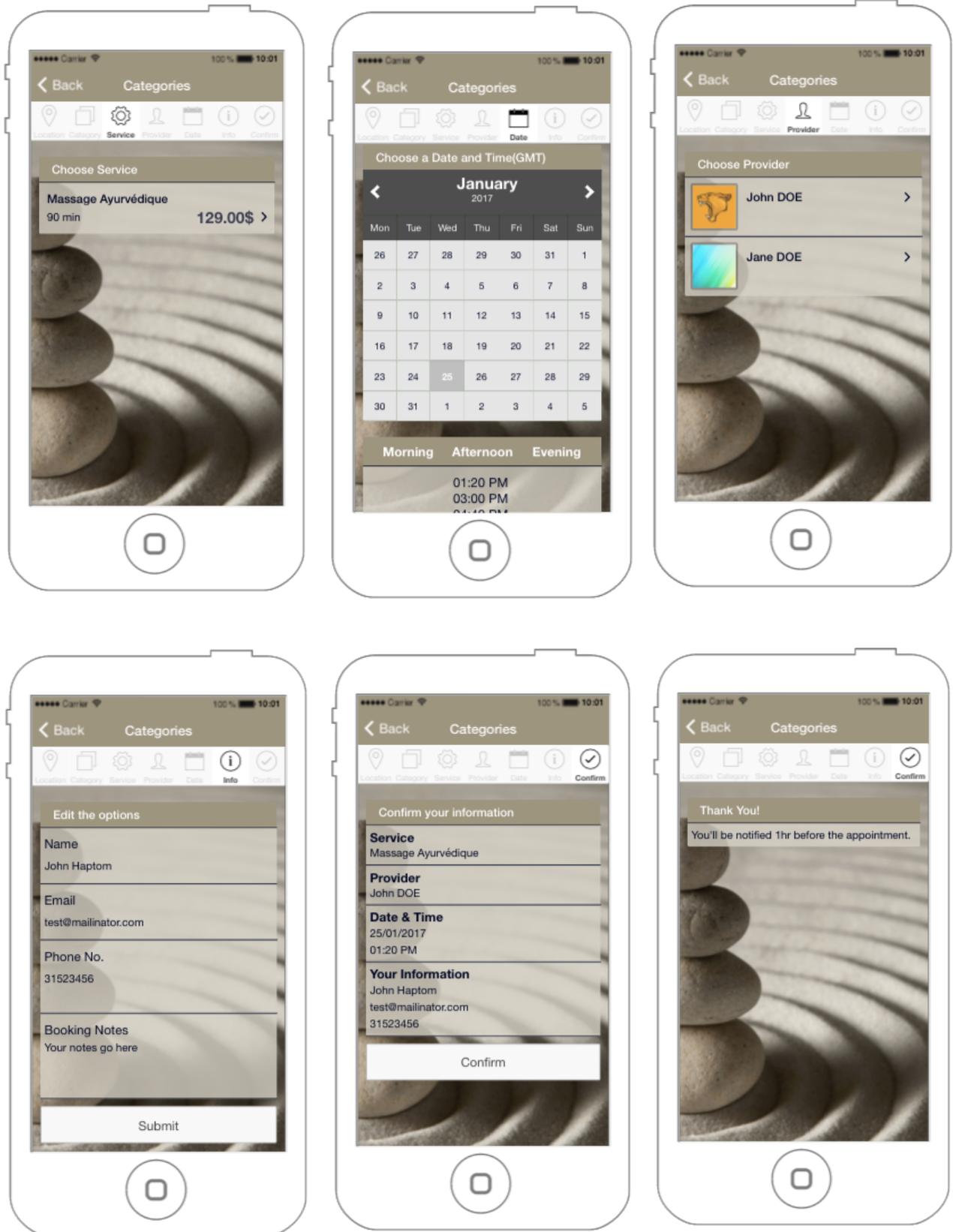


Figure 4.2 – booking confirmation & notifications

