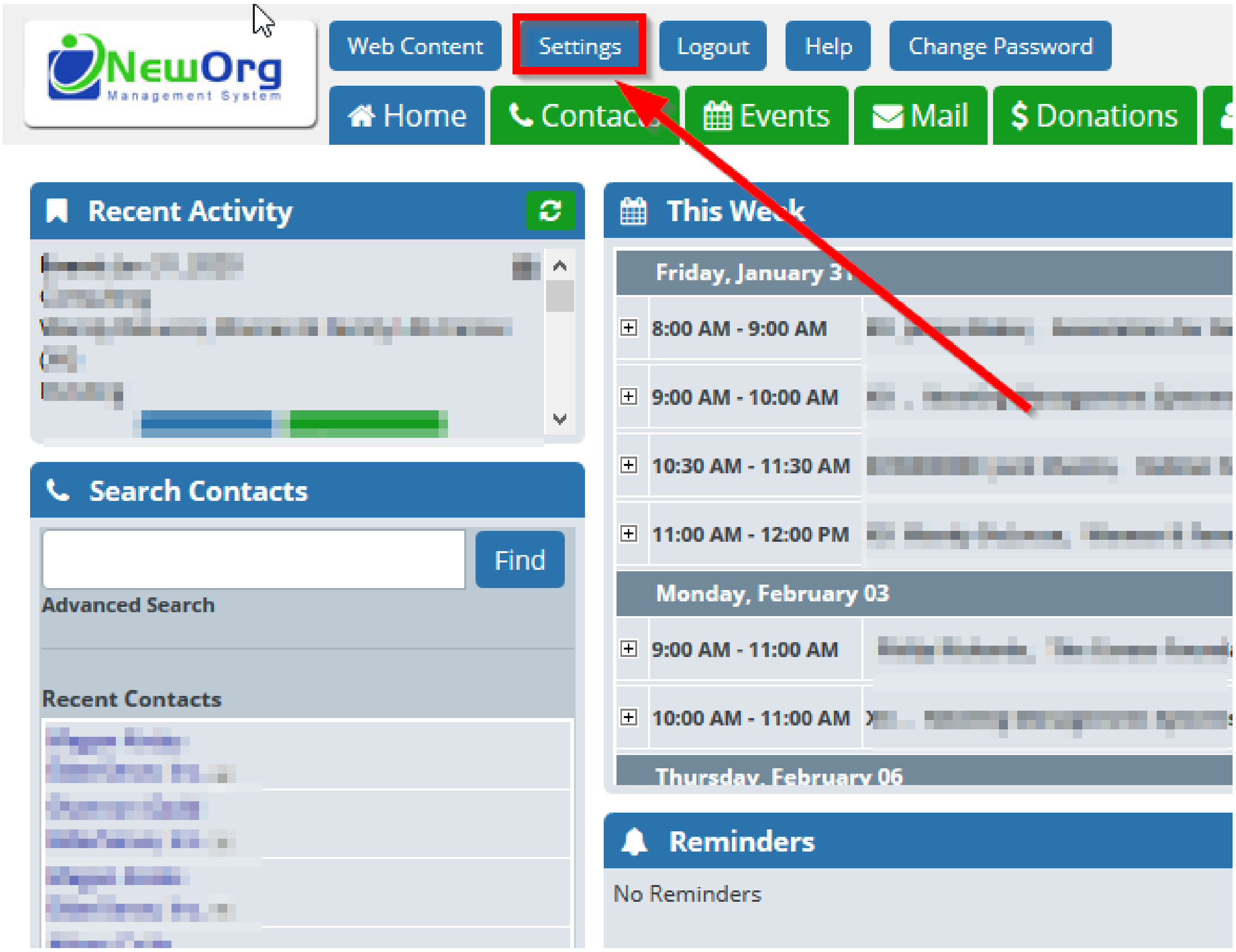
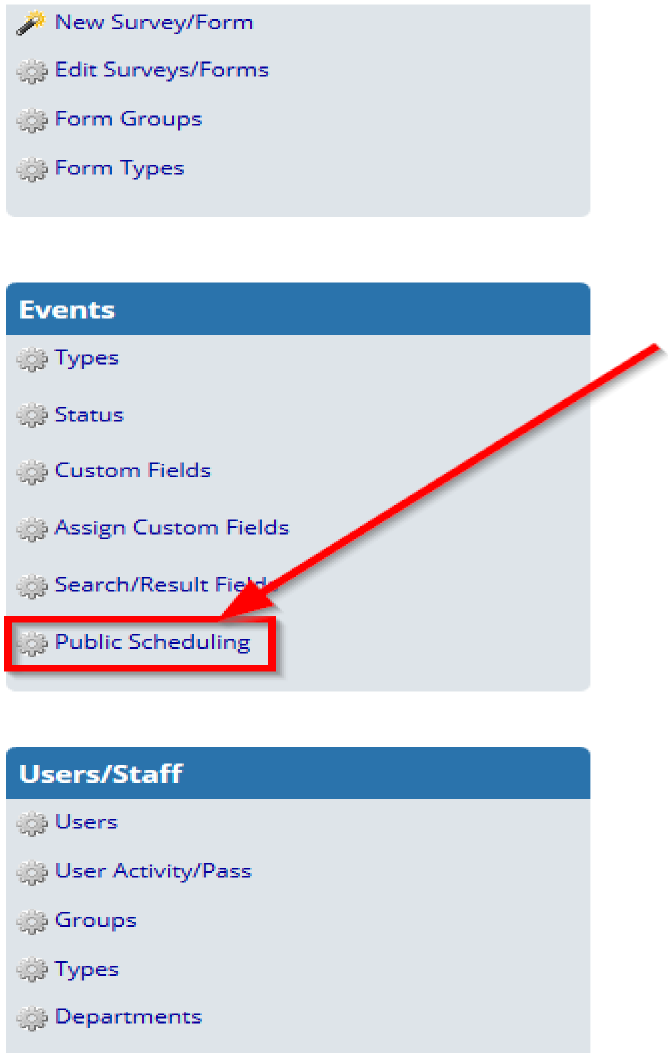
Contents

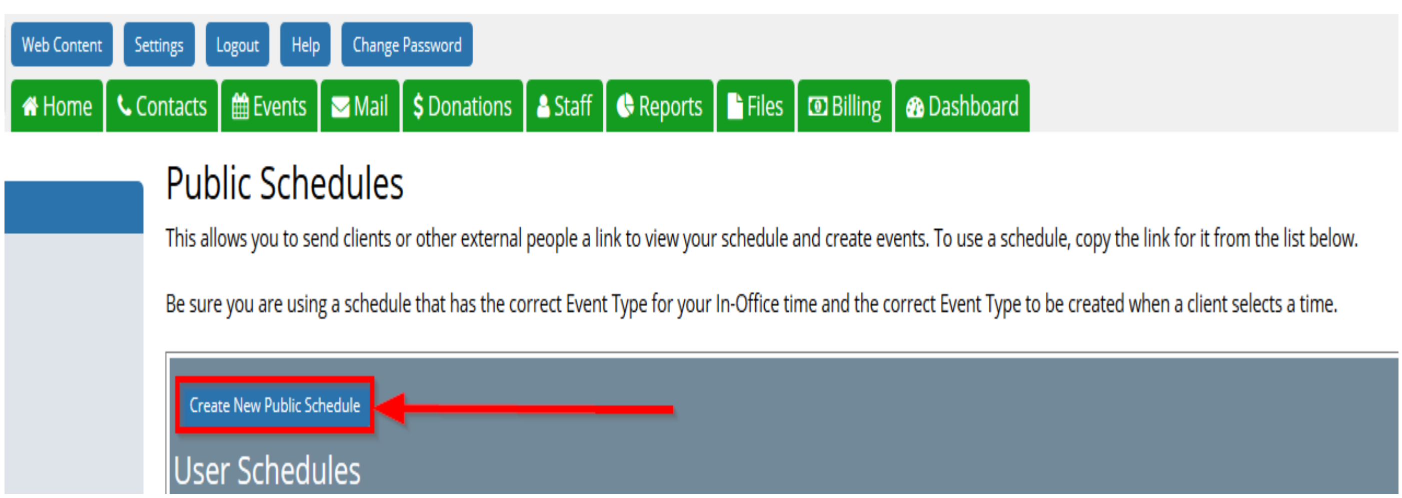
Administrative user setting up online scheduling structure for staff



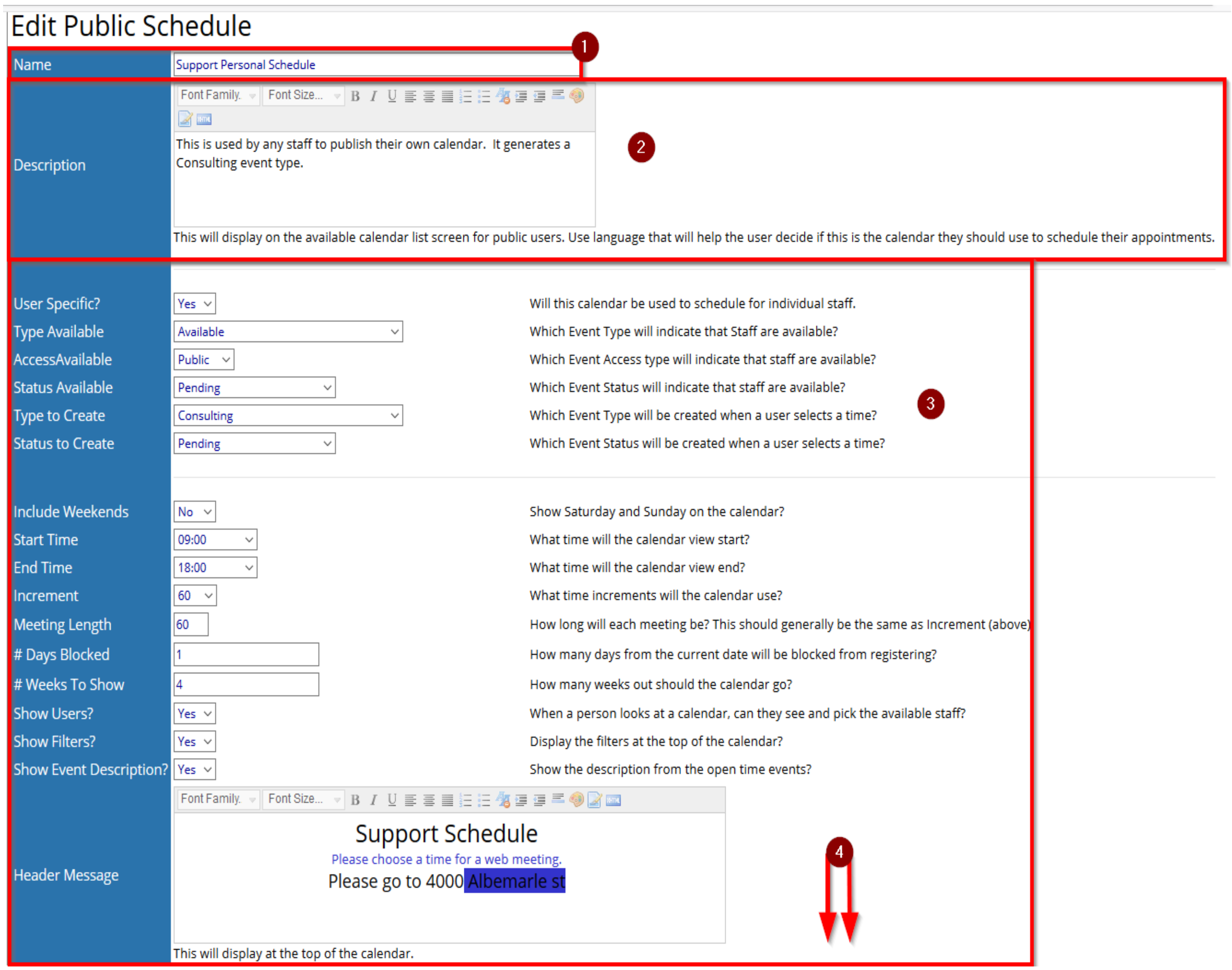
- **Note: You need to have "Admin" privileges to take these steps.**
  Click the "Settings" button at the top left of the screen.



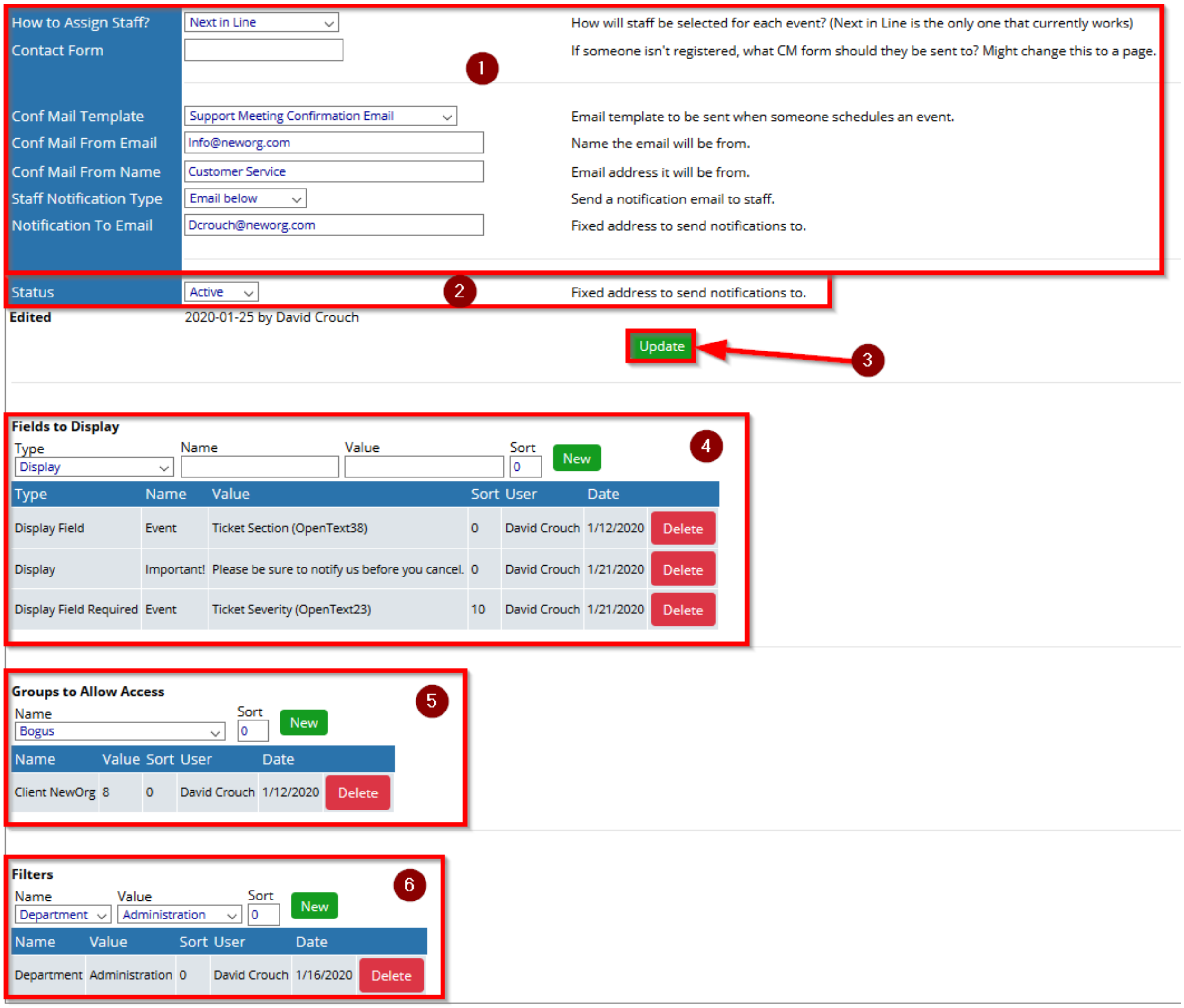
- Scroll down and click the blue text of the “Public Scheduling” text within the “Events” section.



- Click the “Create New Public Schedule” button.

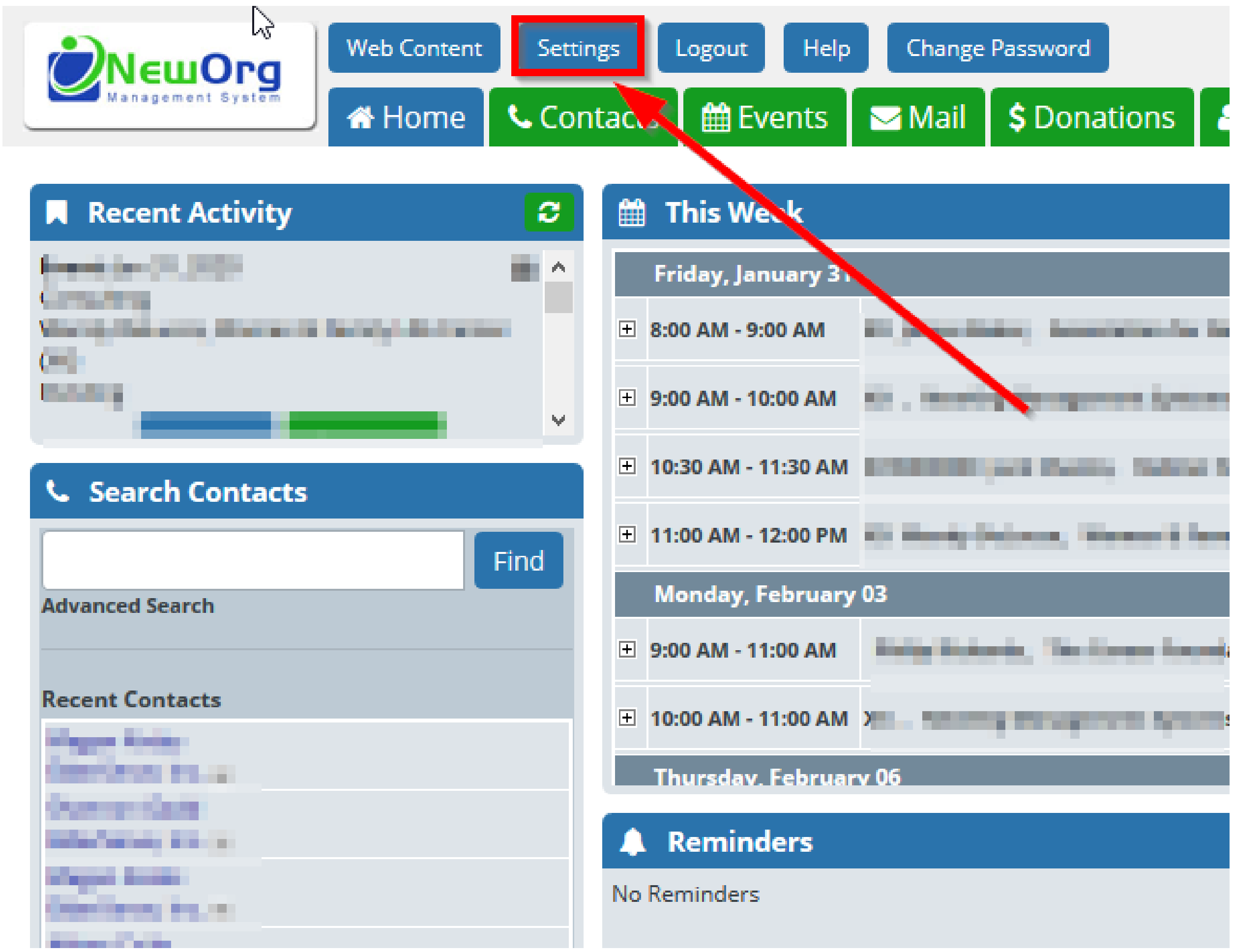


- 1) Enter the "Name" of the schedule.
  2) Enter in text that will display on the available calendar list screen for public users. Use language that will help the user decide if this is the calendar they should use to schedule their appointments.
  Note: The "Type Available" is the event staff will use to designate their availability which translate onto the schedule calendar while the "Type to Create" will be the event that gets created when the contact choose their appointment spot. Therefore, two events you choose will play different roles.
  3) Enter in the rest of the fields available. Descriptions of each on the right of field row.
  4) Scroll down the screen.

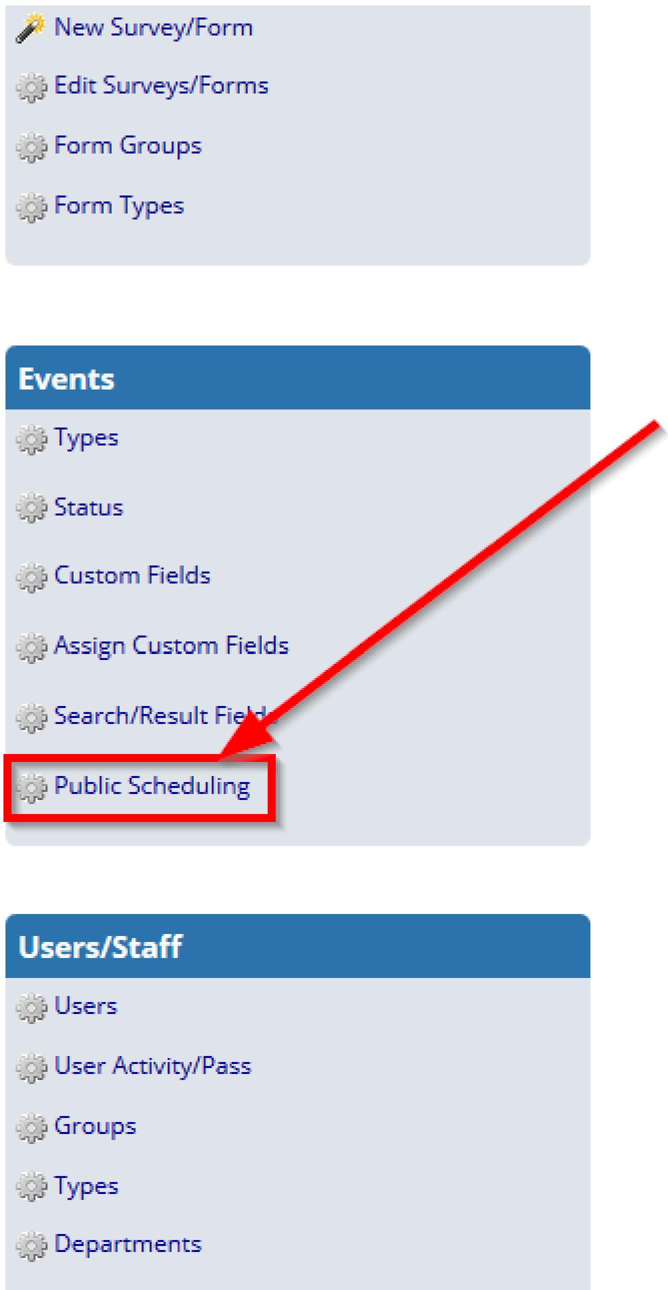


- 1) Continue filling out the rest of the fields.
  2) Change “status” to “Active”.
  3) Click the “Update” button when you are done selecting all the fields.
  4) Select what fields you wish to display to the user when they choose their appointment spot.
  5) Select what contact groups are allowed access to the schedule when they attempt to login.
  6) Select what filters will be available to the user when land on the schedule calendar.

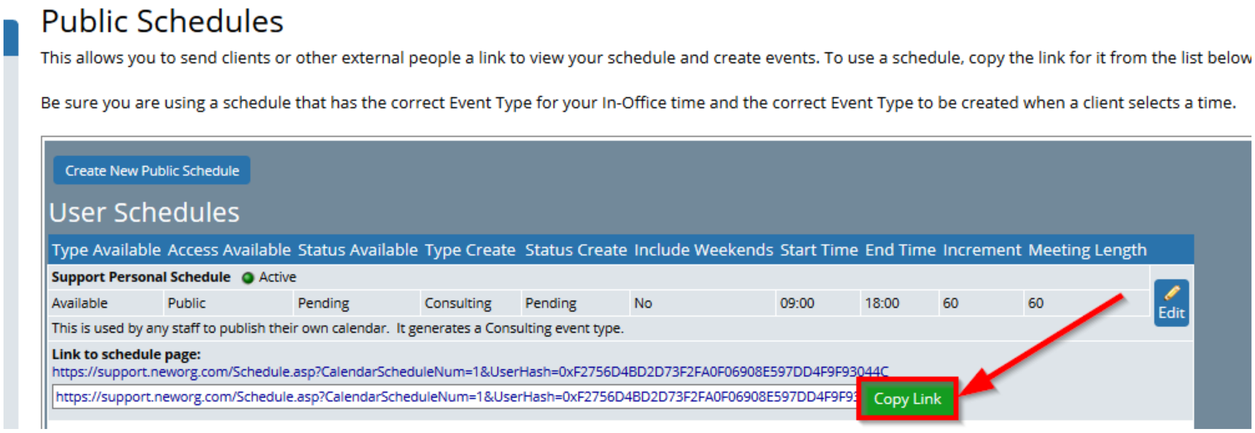
Getting link for schedule calendar so you can embed it on your website or an email



- **Note: You need to have “Admin” privileges to take these steps.**
  Click the “Settings” button at the top left of the screen.

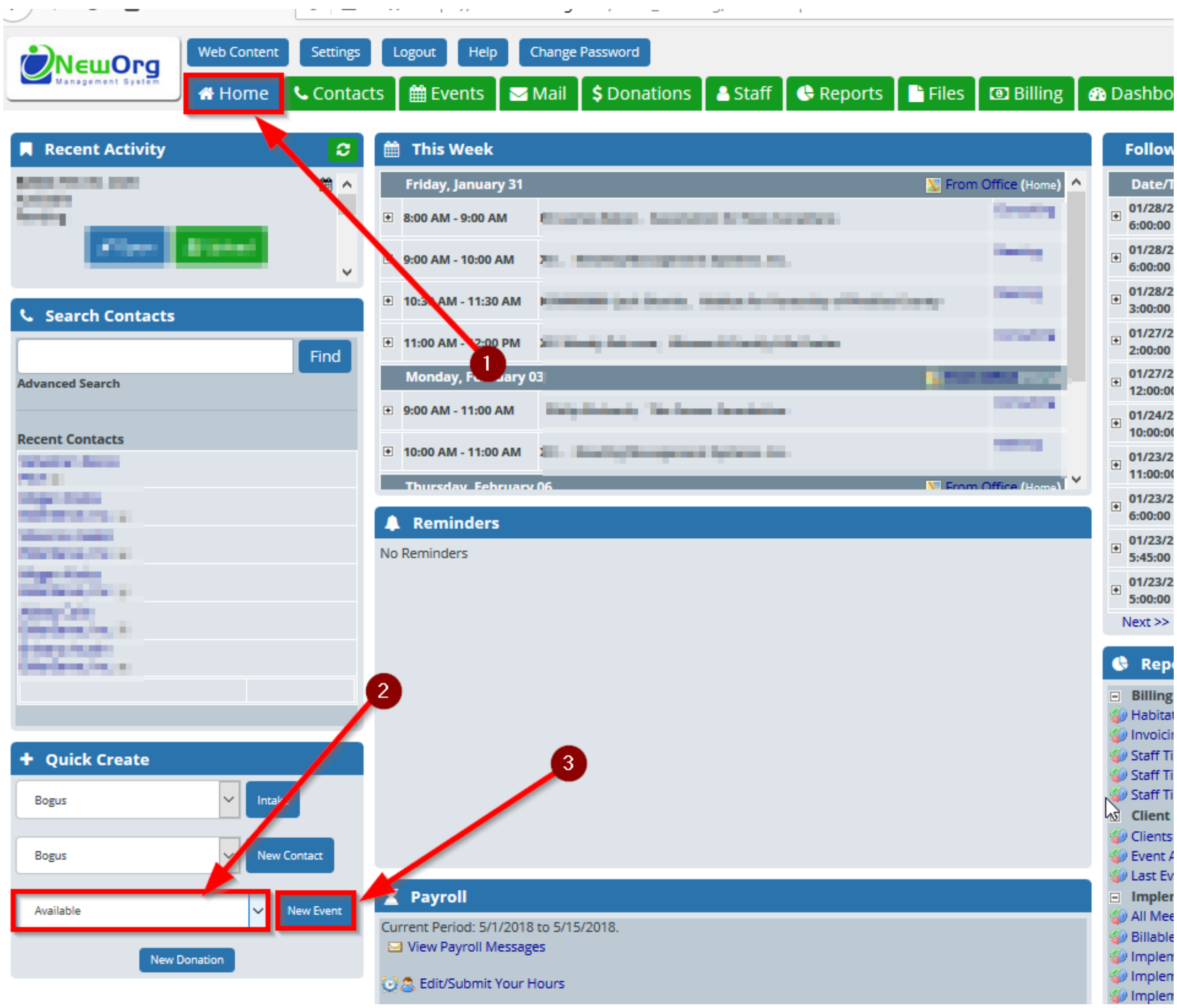


- Scroll down and click the blue text of the “Public Scheduling” text within the “Events” section.

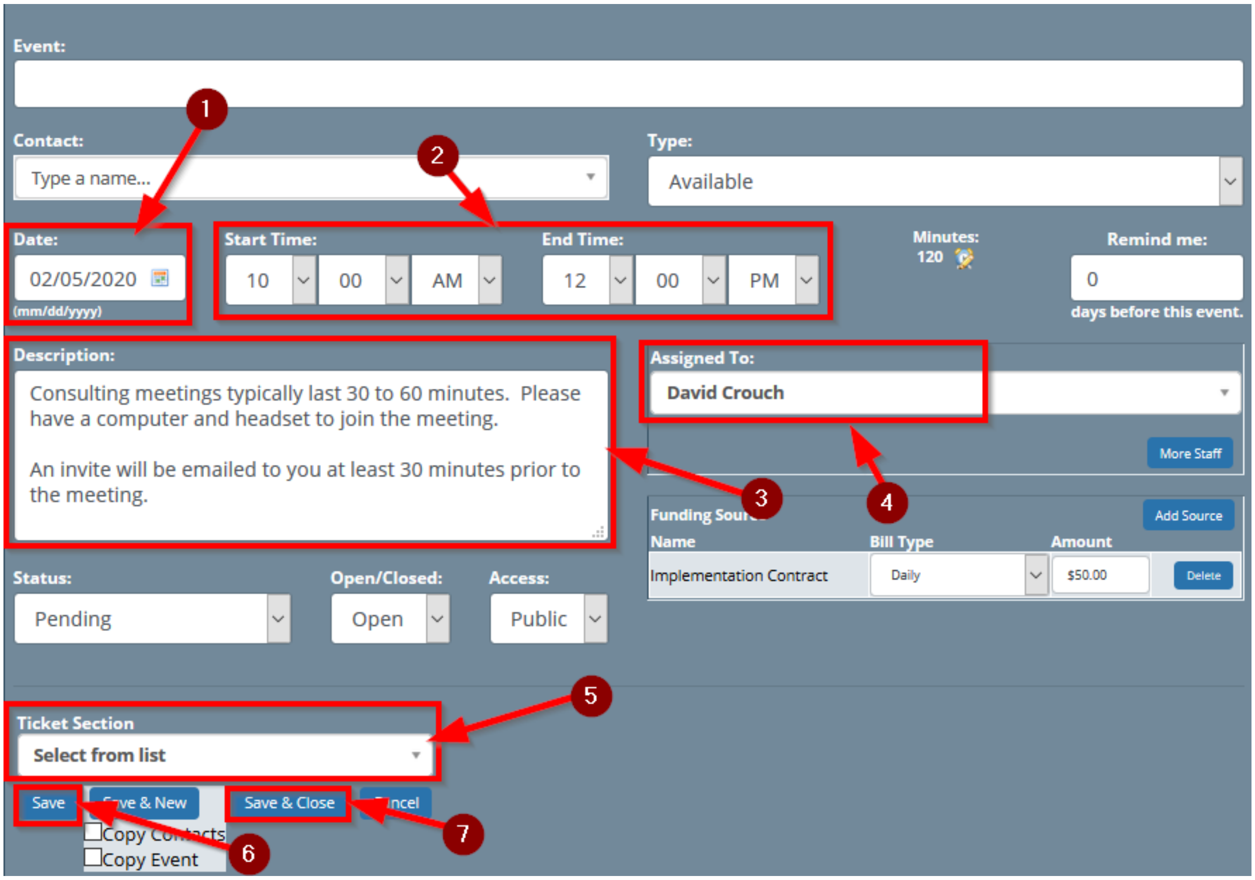


- Click the “Copy Link” of the schedule you wish to embed on your website or email. Paste to where you need it.

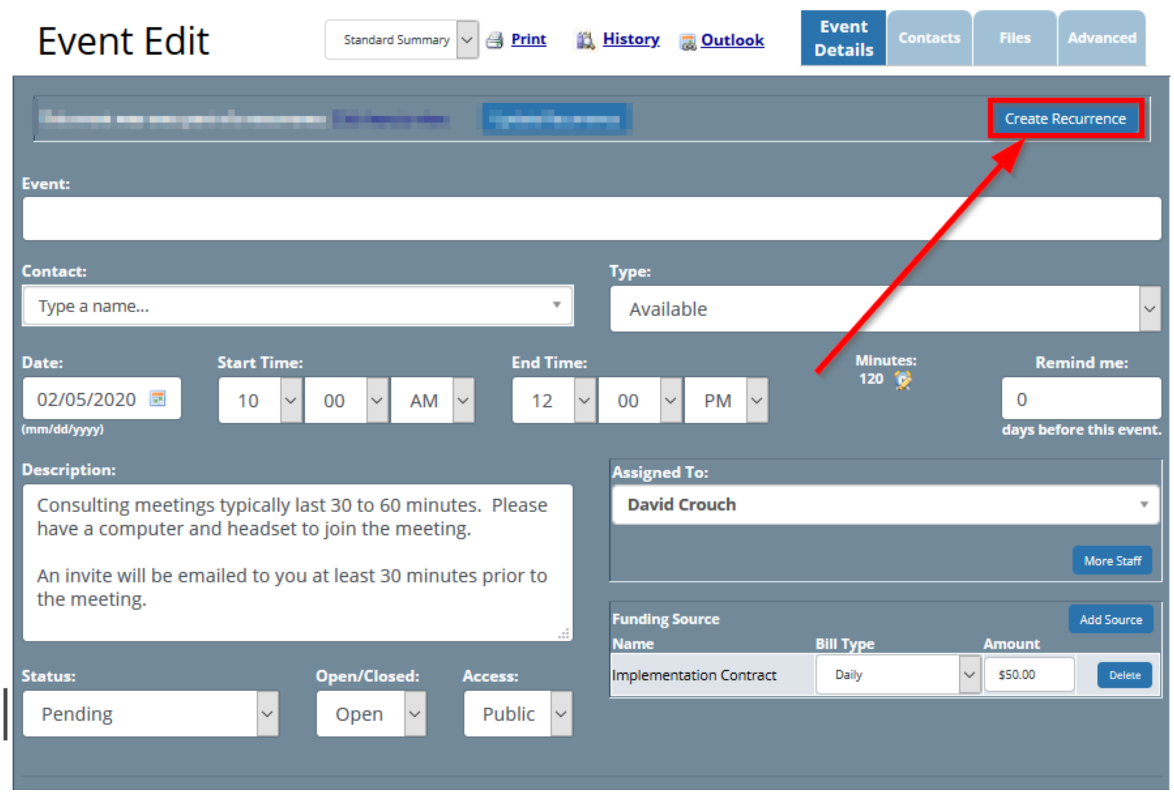
Staff setting up their schedule availability for clients/participants/volunteers to sign up for appointments



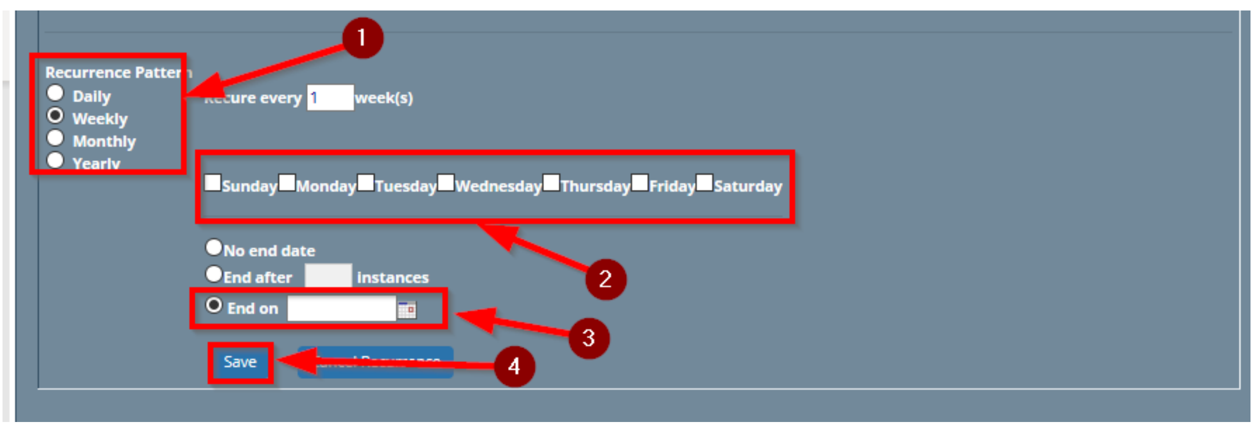
- 1) Click the “Home” tab if not already there.
  2) Choose the event that will be used to designate date(s)/time(s) of availability on the left hand menu.
  3) Click the “New Event” button to the right of the event dropdown.



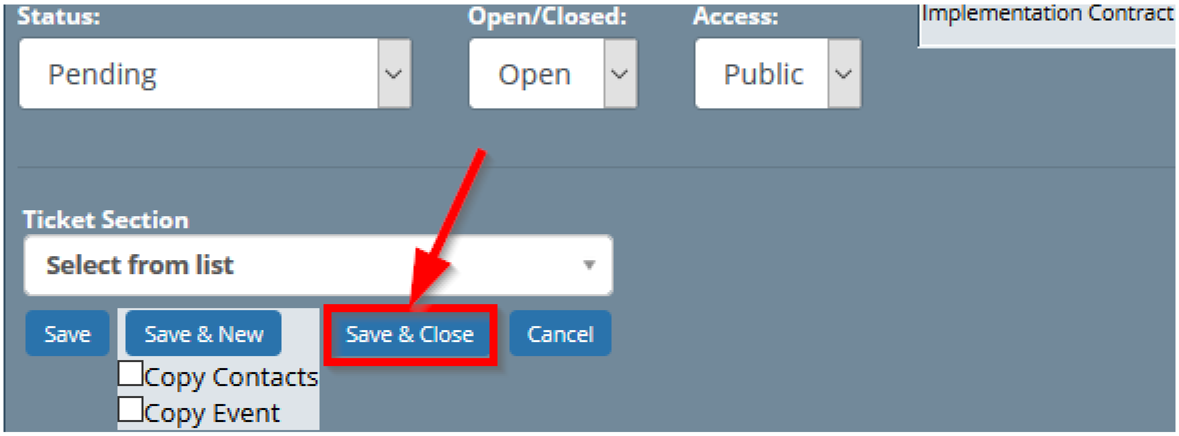
- 1) Enter the "Event Date" of initial availability.
  2) Select the range of time you (staff) are available for.
  3) Enter in the details of what the contact will see when they open an appointment slot within the "Description" text box.
  4) Be sure you are happy with the user (staff) assignment is in the event "Assigned to" dropdown.
  5) Be sure you happy that the event custom fields are correctly assigned to the event that the contact will be selecting in the appointment screen.
  6) If you are wishing to create a recurrence of availability, click the "Save button and skip step 7 within this screenshot and move to the next step in this chapter.
  7) If you only wishing to create this event for just this date click the "Save & Close" button and it will be your last step of this chapter as a result.



- Click the “Create Recurrence” button on the top right of the event screen.

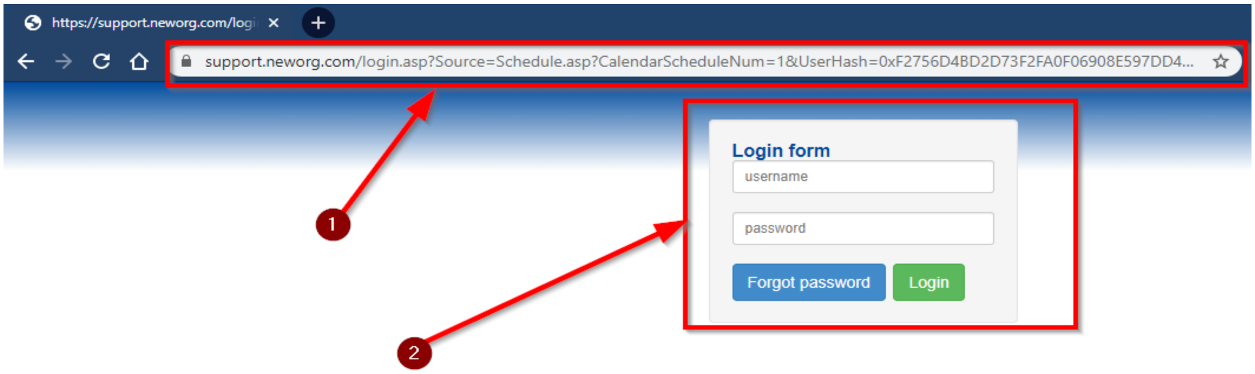


- 1) Select the “Weekly” within the “Recurrence Pattern” on the left of the recurrence screen.
  2) Select what specific days you wish to have the events land.
  3) Select the bullet point of “End on” and select the date the recurrence will end.
  4) Click the “Save” button.

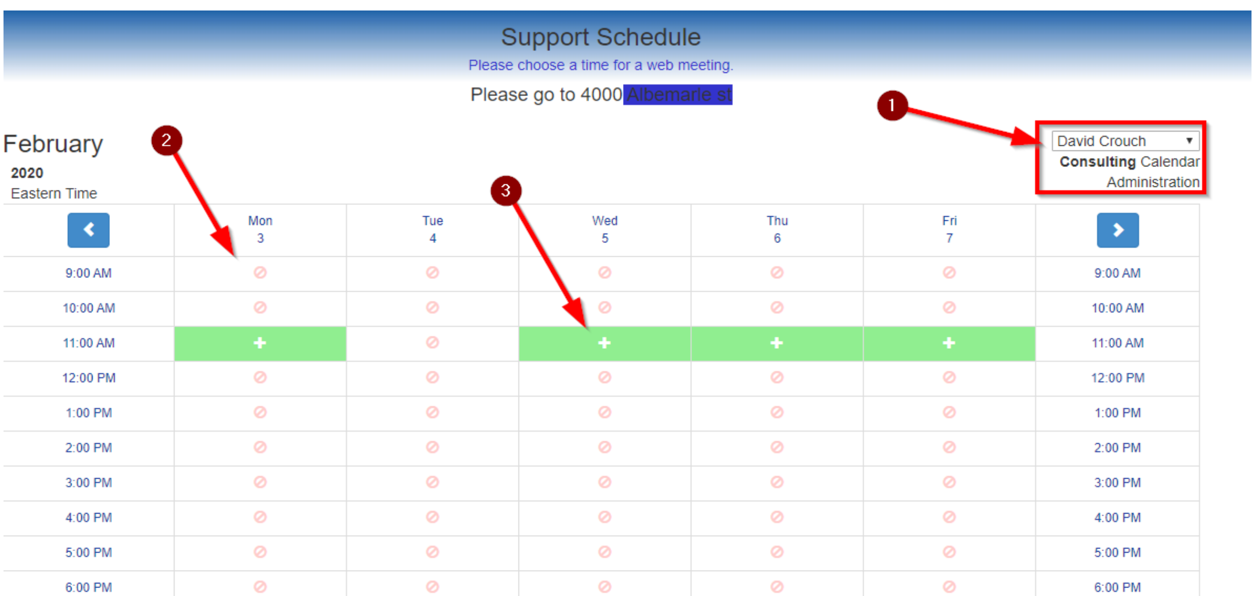


- Click the “Save & Close” button at the bottom of the event screen.

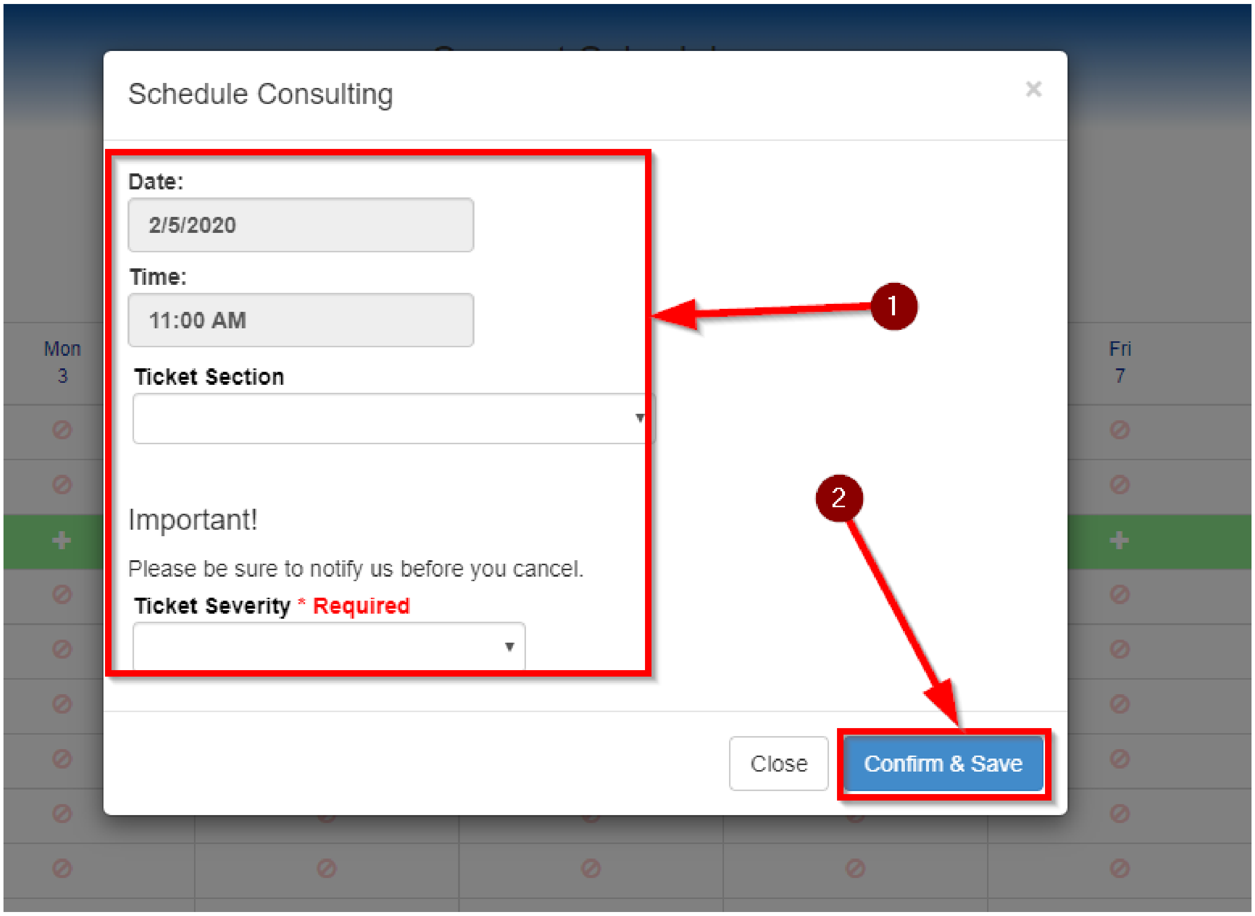
How contacts see the scheduling calendar and steps they will take



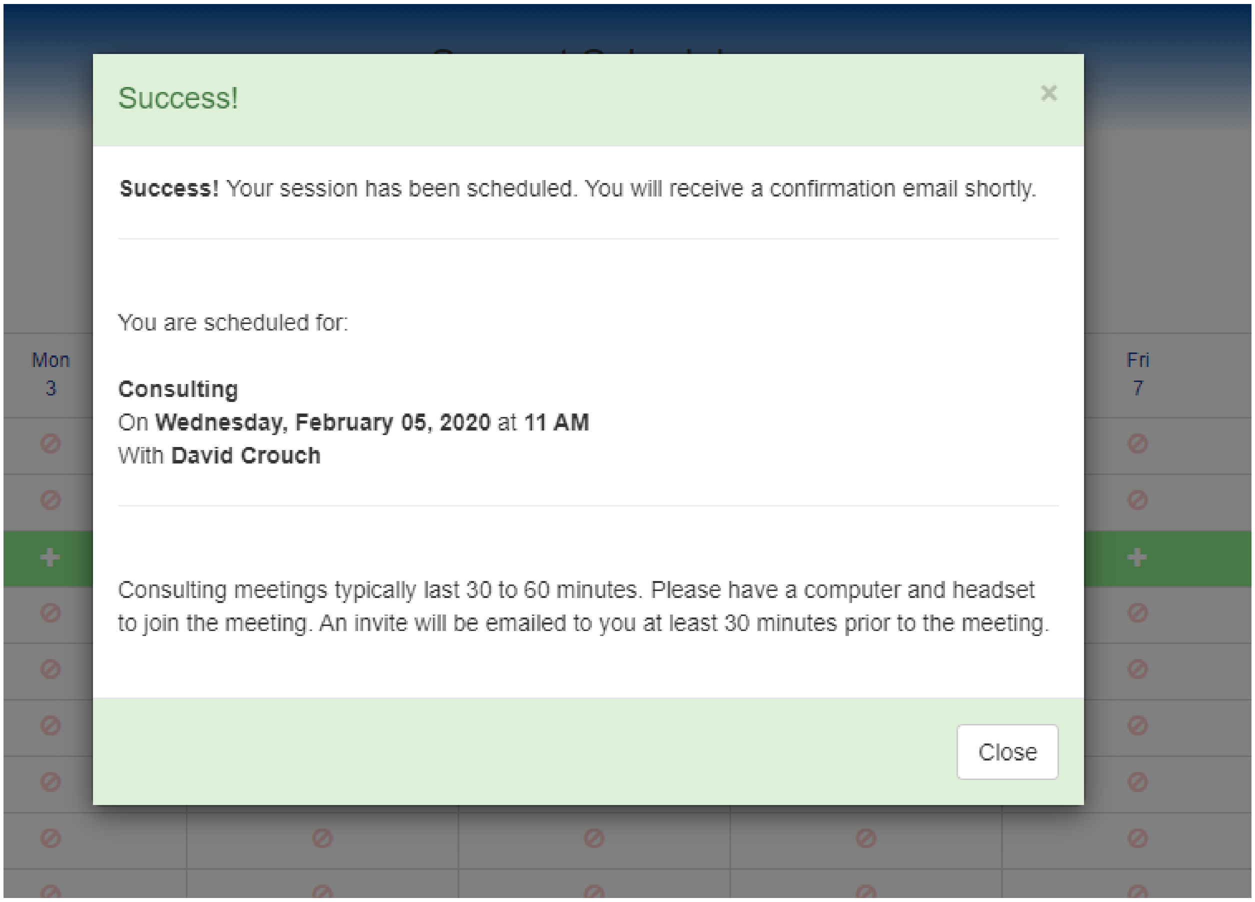
- 1) They will land on this screen based on the URL you embedded.
  2) They will login.



- 1) The filters you choose for the calendar will appear at the top.
  2) If there is a red cross simple it means there is no appointment available at that time.
  3) When they see a green background with white cross it means they can take that scheduled spot.



- 1) Based on the “Fields to Display” in the schedule design the contact will be free to select what is there or required.
  2) To finish the process they click the “Confirm & Save”.



- This is a sample of the confirmation of the booking screen.