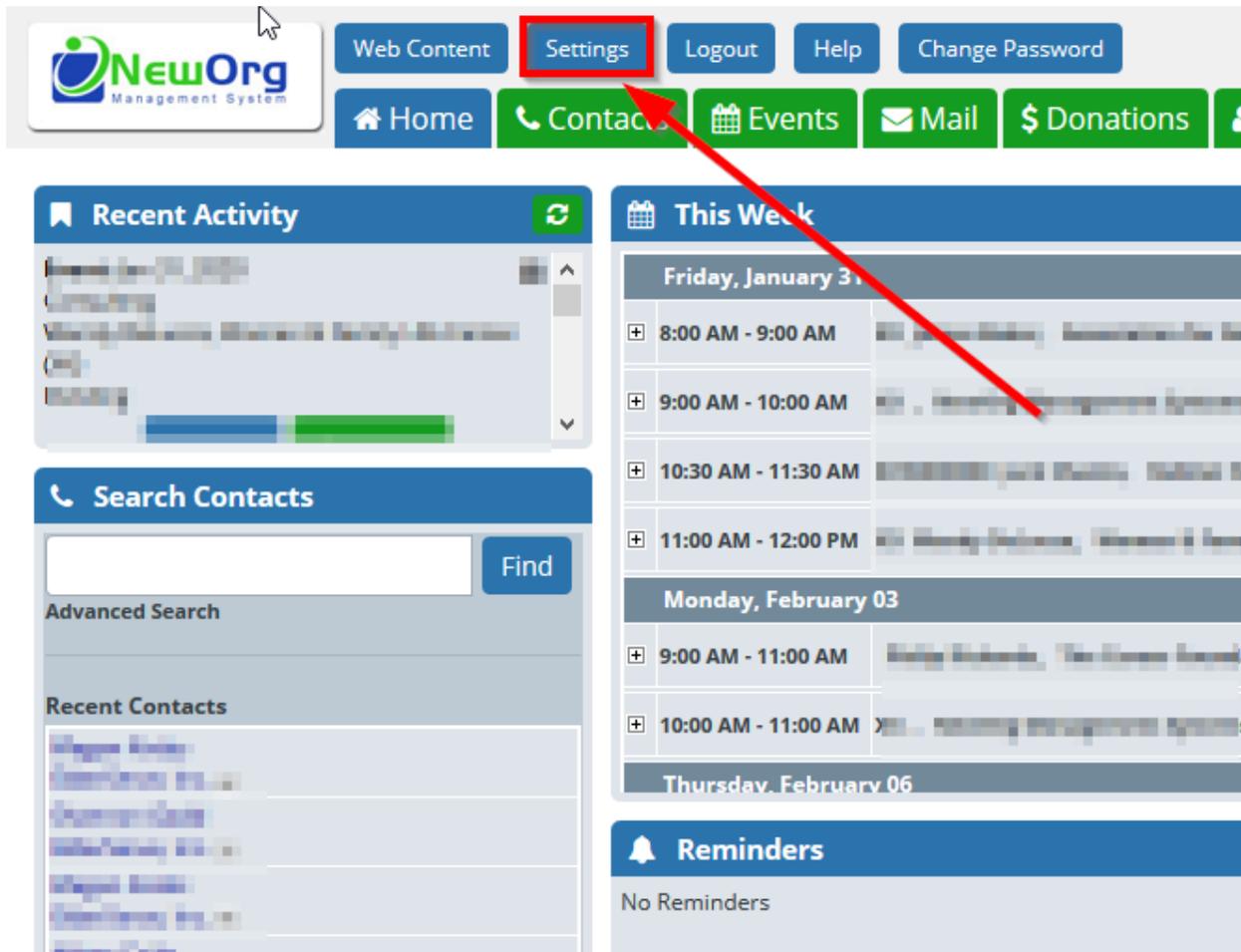




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Administrative user setting up online scheduling structure for staff

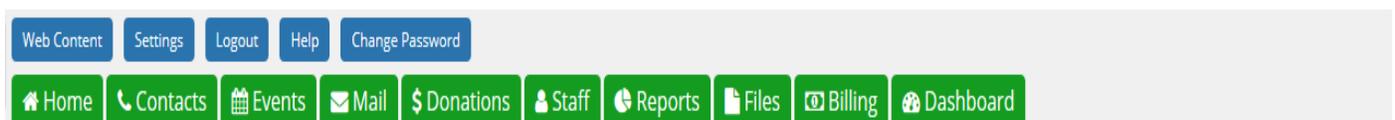


The screenshot displays the NewOrg Management System interface. At the top left is the logo for NewOrg Management System. To its right is a navigation bar with buttons for 'Web Content', 'Settings' (highlighted with a red box), 'Logout', 'Help', and 'Change Password'. Below this is a secondary navigation bar with buttons for 'Home', 'Contacts', 'Events', 'Mail', and 'Donations'. A red arrow points from the 'Settings' button in the top bar to the 'Contacts' button in the secondary bar. The main content area is divided into several sections: 'Recent Activity' with a refresh icon, 'Search Contacts' with a search input and 'Find' button, 'Advanced Search', 'Recent Contacts' with a list of contact names, 'This Week' with a calendar view showing time slots for Friday, January 31, Monday, February 03, and Thursday, February 06, and 'Reminders' with a bell icon and the text 'No Reminders'.

- **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.



Public Schedules

This allows you to send clients or other external people a link to view your schedule and create events. To use a schedule, copy the link for it from the list below.

Be sure you are using a schedule that has the correct Event Type for your In-Office time and the correct Event Type to be created when a client selects a time.

[Create New Public Schedule](#)

User Schedules

- Click the “Create New Public Schedule” button.

Edit Public Schedule

Name	Support Personal Schedule 1	
Description	<div style="border: 1px solid gray; padding: 5px;"> <p>Font Family: Font Size: B I U </p> <p>This is used by any staff to publish their own calendar. It generates a Consulting event type. 2</p> <p>This 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.</p> </div>	
User Specific?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Will this calendar be used to schedule for individual staff.
Type Available	<input type="text" value="Available"/>	Which Event Type will indicate that Staff are available?
Access Available	<input type="text" value="Public"/>	Which Event Access type will indicate that staff are available?
Status Available	<input type="text" value="Pending"/>	Which Event Status will indicate that staff are available?
Type to Create	<input type="text" value="Consulting"/>	Which Event Type will be created when a user selects a time? 3
Status to Create	<input type="text" value="Pending"/>	Which Event Status will be created when a user selects a time?
Include Weekends	<input type="checkbox"/> No <input type="checkbox"/> Yes	Show Saturday and Sunday on the calendar?
Start Time	<input type="text" value="09:00"/>	What time will the calendar view start?
End Time	<input type="text" value="18:00"/>	What time will the calendar view end?
Increment	<input type="text" value="60"/>	What time increments will the calendar use?
Meeting Length	<input type="text" value="60"/>	How long will each meeting be? This should generally be the same as Increment (above)
# Days Blocked	<input type="text" value="1"/>	How many days from the current date will be blocked from registering?
# Weeks To Show	<input type="text" value="4"/>	How many weeks out should the calendar go?
Show Users?	<input type="checkbox"/> Yes <input type="checkbox"/> No	When a person looks at a calendar, can they see and pick the available staff?
Show Filters?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Display the filters at the top of the calendar?
Show Event Description?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Show the description from the open time events?
Header Message	<div style="border: 1px solid gray; padding: 5px;"> <p>Font Family: Font Size: B I U </p> <p style="text-align: center;">Support Schedule</p> <p style="text-align: center;">Please choose a time for a web meeting.</p> <p style="text-align: center;">Please go to 4000 Albemarle st</p> </div> <div style="text-align: right; margin-top: 10px;"> 4 </div> <p>This will display at the top of the calendar.</p>	

- 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.

How to Assign Staff? How will staff be selected for each event? (Next in Line is the only one that currently works)

Contact Form If someone isn't registered, what CM form should they be sent to? Might change this to a page.

Conf Mail Template Email template to be sent when someone schedules an event.

Conf Mail From Email Name the email will be from.

Conf Mail From Name Email address it will be from.

Staff Notification Type Send a notification email to staff.

Notification To Email Fixed address to send notifications to.

Status Fixed address to send notifications to.

Edited 2020-01-25 by David Crouch

Update 3

Fields to Display 4

Type Value New

Type	Name	Value	Sort	User	Date	
Display Field	Event	Ticket Section (OpenText38)	0	David Crouch	1/12/2020	Delete
Display	Important!	Please be sure to notify us before you cancel.	0	David Crouch	1/21/2020	Delete
Display Field Required	Event	Ticket Severity (OpenText23)	10	David Crouch	1/21/2020	Delete

Groups to Allow Access 5

Name Sort New

Name	Value	Sort	User	Date	
Client NewOrg	8	0	David Crouch	1/12/2020	Delete

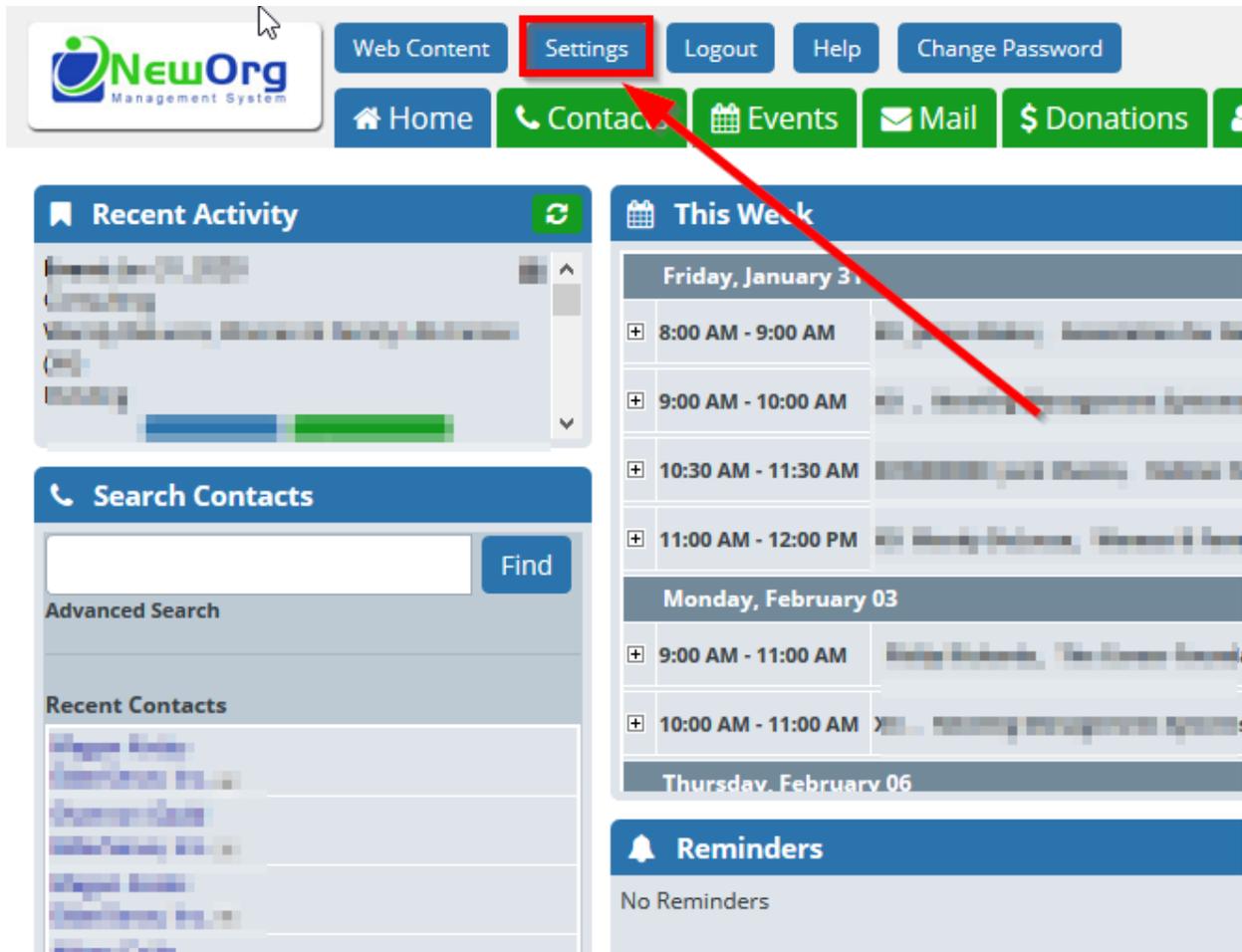
Filters 6

Name Value Sort New

Name	Value	Sort	User	Date	
Department	Administration	0	David Crouch	1/16/2020	Delete

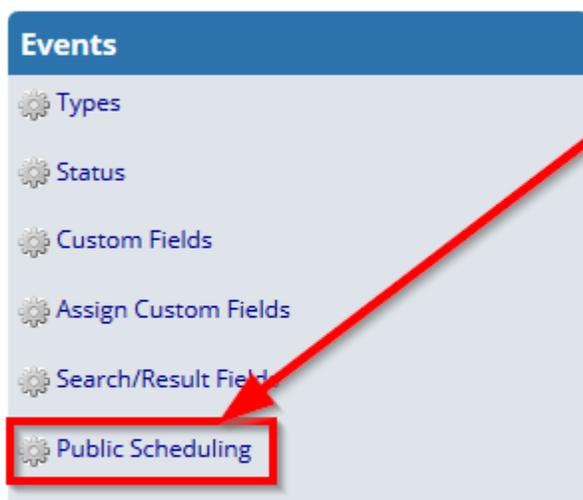
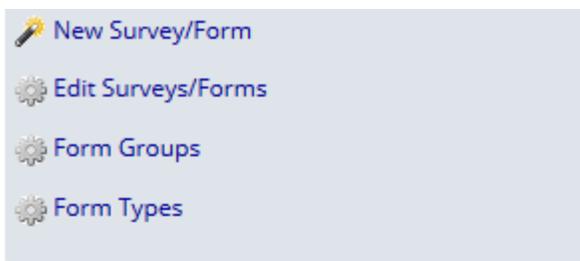
- 1) Continue filling out the rest of the fields.
- 2) Change "status" to "Active".
- 3) Click the "Update" button when you are done selecting all the fields.
- 4) Select what fields you wish to display to the user when they choose their appointment spot.
- 5) Select what contact groups are allowed access 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



The screenshot displays the NewOrg Management System interface. At the top, there is a navigation bar with the following buttons: Web Content, Settings (highlighted with a red box), Logout, Help, and Change Password. Below this, there is a secondary navigation bar with Home, Contacts, Events, Mail, and Donations. The main content area is divided into several sections: Recent Activity, This Week (calendar view), Search Contacts, and Reminders. A red arrow points from the 'Settings' button in the top navigation bar to the 'This Week' calendar section.

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

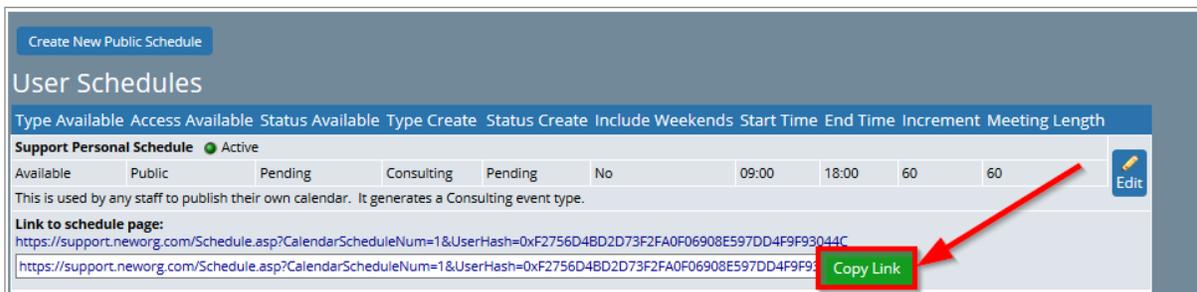


- Scroll down and click the blue text of the “Public Scheduling” text within the “Events” section.

Public Schedules

This allows you to send clients or other external people a link to view your schedule and create events. To use a schedule, copy the link for it from the list below.

Be sure you are using a schedule that has the correct Event Type for your In-Office time and the correct Event Type to be created when a client selects a time.



The screenshot shows a web interface for managing user schedules. At the top, there is a button labeled 'Create New Public Schedule'. Below it, the heading 'User Schedules' is displayed. A table lists various schedules with columns for 'Type', 'Available', 'Access Available', 'Status Available', 'Type Create', 'Status Create', 'Include Weekends', 'Start Time', 'End Time', 'Increment', and 'Meeting Length'. One schedule is highlighted: 'Support Personal Schedule' (Active). Below the table, there is a note: 'This is used by any staff to publish their own calendar. It generates a Consulting event type.' Underneath, a section titled 'Link to schedule page:' provides a URL. A red arrow points to a green 'Copy Link' button located at the end of the URL.

Type	Available	Access Available	Status Available	Type Create	Status Create	Include Weekends	Start Time	End Time	Increment	Meeting Length	
Support Personal Schedule	Active										
Available	Public	Pending	Consulting	Pending	No		09:00	18:00	60	60	Edit

Link to schedule page:
<https://support.neworg.com/Schedule.asp?CalendarScheduleNum=1&UserHash=0xF2756D4BD2D73F2FA0F06908E597DD4F9F93044C>
<https://support.neworg.com/Schedule.asp?CalendarScheduleNum=1&UserHash=0xF2756D4BD2D73F2FA0F06908E597DD4F9F93044C> Copy Link

- 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

The screenshot shows the NewOrg Management System interface. At the top, there is a navigation bar with the following tabs: Home, Contacts, Events, Mail, Donations, Staff, Reports, Files, Billing, and Dashbo. Below the navigation bar, there are several sections: 'Recent Activity', 'Search Contacts', 'Quick Create', 'This Week' (calendar view), 'Reminders', and 'Payroll'. The 'Quick Create' section has a dropdown menu with 'Available' selected, and a 'New Event' button next to it. The 'This Week' section shows a calendar view for Friday, January 31, and Monday, February 03. The 'Reminders' section shows 'No Reminders'. The 'Payroll' section shows 'Current Period: 5/1/2018 to 5/15/2018'. A red box highlights the 'Home' tab in the navigation bar, and a red arrow points to it with a circled '1'. Another red box highlights the 'Available' dropdown in the 'Quick Create' section, with a red arrow pointing to it and a circled '2'. A third red box highlights the 'New Event' button next to the dropdown, with a red arrow pointing to it and a circled '3'.

- 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.

The screenshot shows a web form for creating an event. The form includes the following fields and sections:

- Event:** A text input field at the top.
- Contact:** A text input field with a dropdown arrow.
- Type:** A dropdown menu set to "Available".
- Date:** A date picker set to "02/05/2020".
- Start Time:** A time picker set to "10:00 AM".
- End Time:** A time picker set to "12:00 PM".
- Minutes:** A field set to "120".
- Remind me:** A field set to "0 days before this event".
- Description:** A text area containing the text: "Consulting meetings typically last 30 to 60 minutes. Please have a computer and headset to join the meeting. An invite will be emailed to you at least 30 minutes prior to the meeting."
- Assigned To:** A dropdown menu set to "David Crouch".
- Funding Source:** A table with columns: Name, Bill Type, Amount. It shows "Implementation Contract", "Daily", and "\$50.00".
- Status:** A dropdown menu set to "Pending".
- Open/Closed:** A dropdown menu set to "Open".
- Access:** A dropdown menu set to "Public".
- Ticket Section:** A dropdown menu set to "Select from list".
- Buttons:** "Save", "Save & New", "Save & Close", and "Cancel".
- Checkboxes:** "Copy Contacts" and "Copy Event".

- 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.

Event Edit

Standard Summary [Print](#) [History](#) [Outlook](#) **Event Details** [Contacts](#) [Files](#) [Advanced](#)

[Create Recurrence](#)

Event:

Contact: Type: Available

Date: 02/05/2020 Start Time: 10:00 AM End Time: 12:00 PM Minutes: 120 Remind me: 0 days before this event.

Description: Consulting meetings typically last 30 to 60 minutes. Please have a computer and headset to join the meeting. An invite will be emailed to you at least 30 minutes prior to the meeting.

Assigned To: David Crouch [More Staff](#)

Funding Source:

Name	Bill Type	Amount
Implementation Contract	Daily	\$50.00

[Add Source](#) [Delete](#)

Status: Pending Open/Closed: Open Access: Public

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

Recurrence Pattern

Daily Weekly Monthly Yearly

Recurrence every 1 week(s)

Sunday Monday Tuesday Wednesday Thursday Friday Saturday

No end date End after instances End on

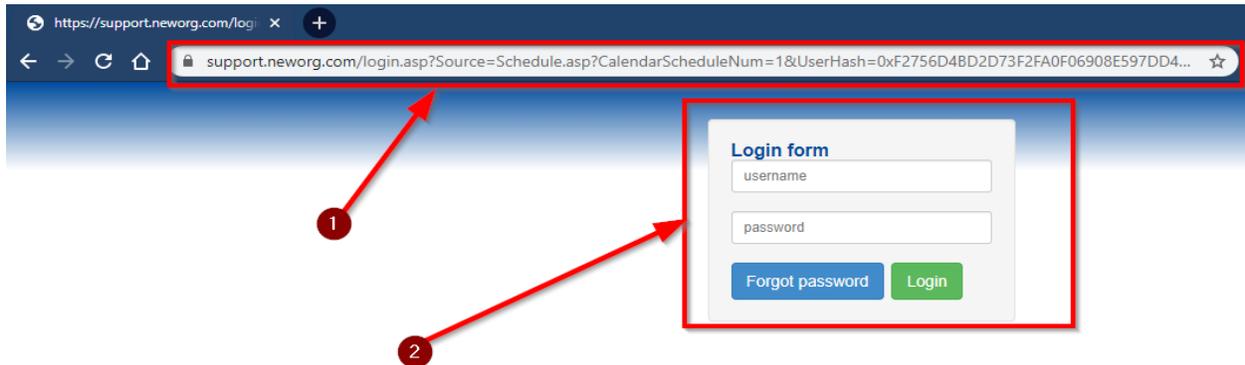
[Save](#)

- 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.

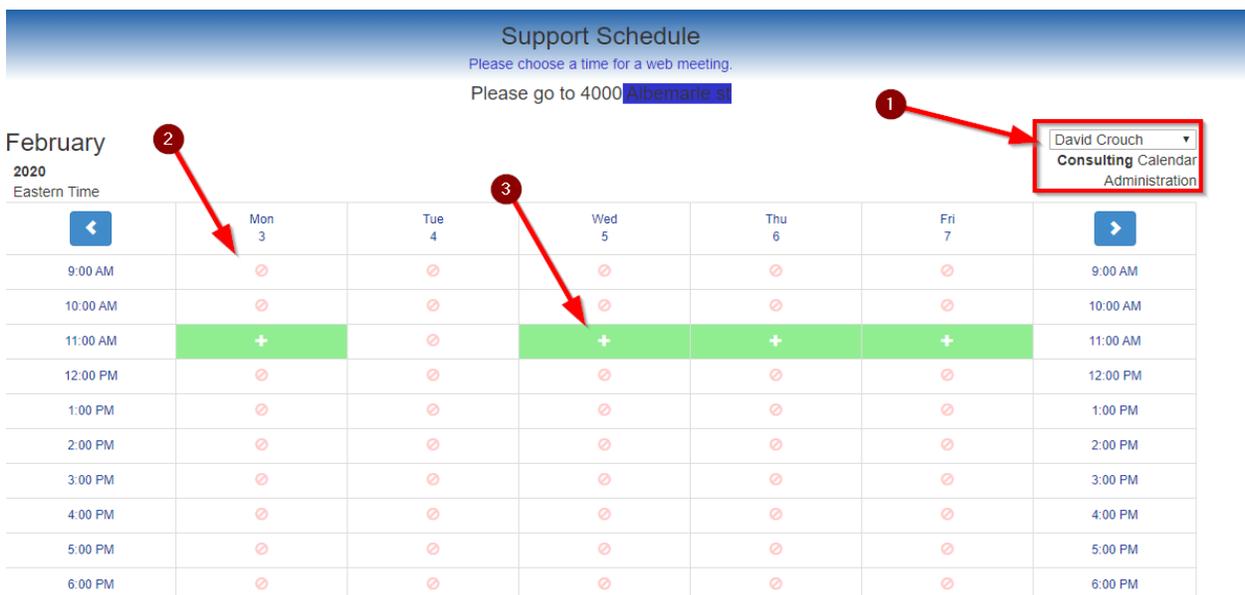
The screenshot shows a user interface for managing an event. At the top, there are three dropdown menus: 'Status:' with 'Pending' selected, 'Open/Closed:' with 'Open' selected, and 'Access:' with 'Public' selected. To the right of these is a tab labeled 'Implementation Contract'. Below these is a 'Ticket Section' dropdown menu with 'Select from list' selected. At the bottom, there are four buttons: 'Save', 'Save & New', 'Save & Close', and 'Cancel'. The 'Save & Close' button is highlighted with a red rectangular box, and a red arrow points to it from above. Below the buttons are two checkboxes: 'Copy Contacts' and 'Copy Event', both of which are unchecked.

- 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.

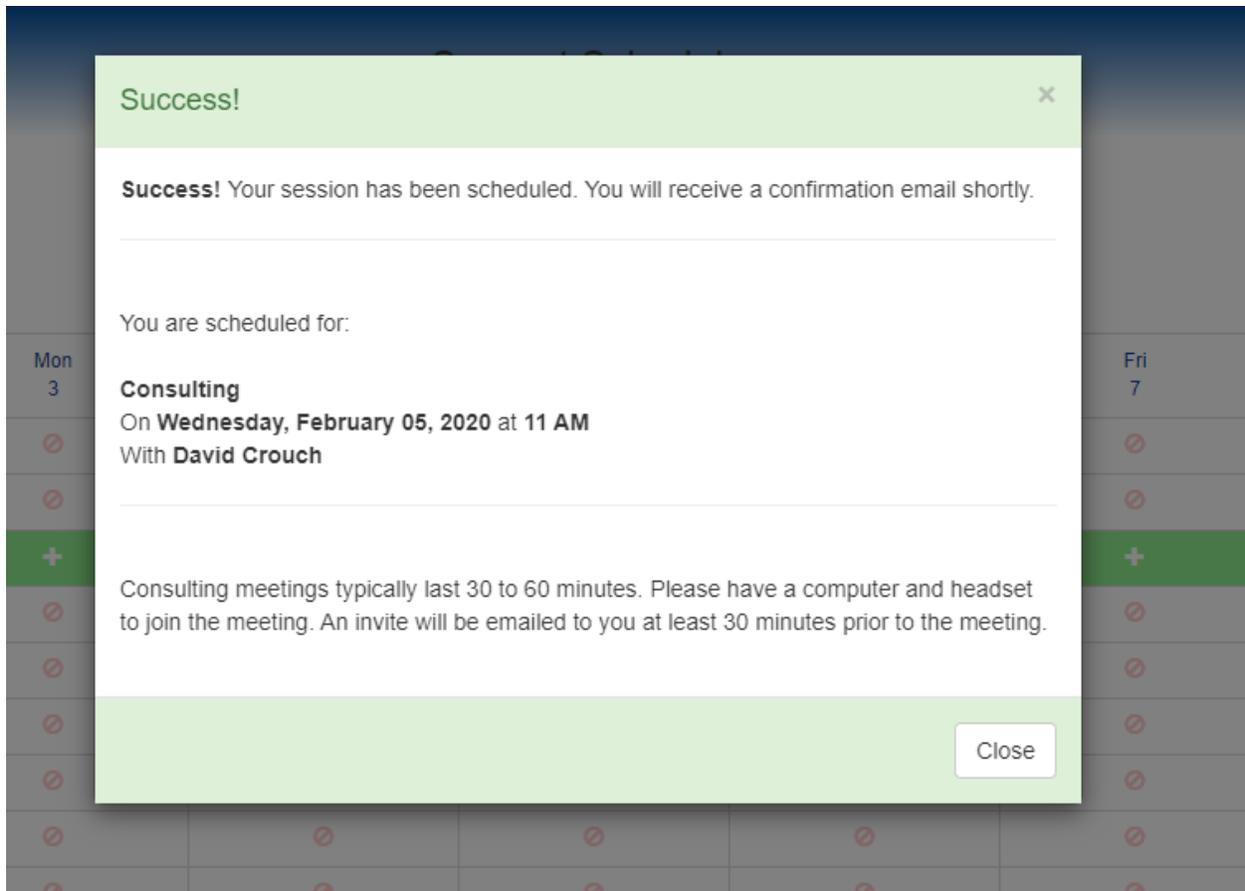
The image shows a 'Schedule Consulting' dialog box with the following fields and elements:

- Date:** 2/5/2020
- Time:** 11:00 AM
- Ticket Section:** A dropdown menu.
- Important!** Please be sure to notify us before you cancel.
- Ticket Severity * Required:** A dropdown menu.
- Buttons:** 'Close' and 'Confirm & Save'.

Two red arrows with circular markers point to specific elements:

- Arrow 1 points to the right side of the form fields.
- Arrow 2 points to the 'Confirm & Save' button.

- 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.