

# Appointment Scheduling System By Grace Schedules



[www.graceschedules.com](http://www.graceschedules.com)

Administration User Manual  
Volume 1

Table of Contents

- Introduction ..... 4
- Setting Up Your Scheduler ..... 4
  - Appearance ..... 4
    - Color Scheme ..... 4
    - Fonts & Borders ..... 4
    - Header ..... 4
    - Logo ..... 4
    - Subtitle ..... 5
    - Advertising ..... 5
  - Services Offered ..... 5
    - Adding, Editing, & Deleting Services ..... 5
    - Creating “Block” Services ..... 5
  - Hours & Days of Work ..... 5
    - Assigning Hours of Work for Business ..... 5
    - Assigning Hours of Work for Individual Resources ..... 5
    - Setting the Display Interval ..... 6
    - Assigning Days of Work ..... 6
  - Resources ..... 6
    - What is a Resource? ..... 6
    - Adding, Editing, & Deleting Resources ..... 6
  - Company Information ..... 6
  - Website Content ..... 6
    - Main Page Content ..... 6
    - Registration Page Content ..... 7
  - Email Content ..... 7
    - Registration Email ..... 7
    - Confirmation Email ..... 7
  - Other Customization Functions ..... 7
    - Display Options for Main Page ..... 7
    - Days Notice ..... 7
    - Session Time Out ..... 7
    - Automatic Send ..... 7
    - Allow Appointment Cancelations Option ..... 8
- Changing Your Account Details ..... 8
- Calendar Page ..... 8
  - Scheduling Appointments ..... 8
  - Viewing Options ..... 8
  - Recurring Appointments ..... 8
  - Rescheduling and Canceling Appointments ..... 9
  - Printing Schedules ..... 9
- Appointments Page ..... 9
  - Editing & Deleting Appointments ..... 9
  - Search & Sort Features ..... 9

Printing .....	10
Exporting to Excel.....	10
Members Page .....	10
Adding, Editing & Deleting Members .....	10
Admin accounts .....	10
Client accounts .....	10
Limited accounts.....	10
Sending Mass Emails.....	10
Search & Sort Features .....	10
Printing .....	10
Exporting to Excel.....	11
Website Integration.....	11
Customization .....	11
Reseller Program.....	11
Helpful Links.....	11

## Introduction

Grace Schedules has developed an Appointment Scheduling System that is simple and affordable, yet extremely dynamic. It can be tailored to work well with any business type and any website theme.

This document provides instruction on how to use the administration portion of the system and covers all of its functions and features. For instruction on how to use the client section of the system you can download and review the [Client User Manual](#) available on our website.

## Setting Up Your Scheduler

After subscribing to your Grace Schedules system you will receive a startup email with your login details and links to your system. For the purpose of this document we'll be logging into the Administrator section of the system.

Setting up your scheduler is all done from one easy to manage page. Click the "preferences" link in the top right corner to display the Preferences page.

✓ **Tip:** Each section offers relevant quick tips when you place your mouse pointer over the header.

### Appearance

#### Color Scheme

Matching your scheduler to the theme of your website or business theme couldn't be easier. You can change the color of each part of your system by using the simple color picker or by entering the name of the color (i.e. red) or hexadecimal color code (i.e. FF0000).

#### Fonts & Borders

Select from 28 web friendly fonts. This font will be used throughout the entire site. Select the size for your body text.

✓ **Tip:** Selecting a font too large could impact the way the site is displayed.

The main border surrounding your scheduler can be modified to 9 different styles and 6 sizes, or none at all.

#### Header

There are 2 ways to incorporate your logo into the header of your scheduler; by entering a path or uploading an image. In the section called Header you can enter the URL path of the image you wish to display. The ideal size of your header should be 728 pixels wide and 100 pixels high.

You can choose to display your company name in the header and modify the font style and size.

#### Logo

Click the link under the Logo heading to upload an image (jpg or gif files

The screenshot shows the 'Preferences' page for the Grace Schedules system. It is organized into several sections:

- COLOR SCHEME:** A list of color pickers for various elements: Outer Background (00CCFF), Inner Background (FFFFFF), Header Background (88A97E), Header Font (660000), Form Background (D9CBAE), Top Menu Font (630003), Link (630003), Link Mouseover (893E42), Title (630003), Footer (893E42), Main Border (FFFFFF), Table Border (FFFFFF), Subtitle (000000), and Body Text (000000).
- FONTS & BORDERS:** Includes a dropdown for Body Font (Verdana), a dropdown for Body Font Size (10), and a dropdown for Main Border (double).
- HEADER:** Includes a dropdown for Font (Garamond), a dropdown for Size (don't display header title), a 'Header Background URL' field with a 'Clear' button, and an empty text input field.
- LOGO:** Features a link 'Click here to upload a logo', a checked checkbox 'Display Logo in Header', and a 'Link to:' field with the value 'http://www.graceschedules.com'.
- SUBTITLE:** Includes a text input field with the HTML code '<a target=blank href=http://www.grac'.
- ADVERTISING:** Features a checked checkbox 'Display Google Ads' and two buttons: 'Defaults' and 'Save'.

only). Enter the address of the website you would like your logo to link to. Clicking the image will open up this site in a new window.

✓ **Tip:** Unlike using a path for your header, the height of your image will determine the height of the header section.



### Subtitle

In our example to the right we use the subtitle to create a link to our order page "CLICK HERE TO ORDER YOUR SCHEDULER TODAY!" You can place any text or HTML here or leave it blank if you prefer.

### Advertising

It's your option to display Google ads at the bottom of your scheduler.

✓ **Tip:** Often Grace Schedules subscribers will want their own ads placed on their scheduler. Grace Schedules will replace the code for a small fee.

### Services Offered

#### Adding, Editing, & Deleting Services

Add an unlimited number of services and relative time intervals for each. Assigning color codes and costs are optional. Edit or delete a service by selecting from the list provided.

#### Creating "Block" Services

Services created with the first 6 letters "Block" are treated as admin only services. This means that clients will not be able to select from these options. Block services are commonly used for lunch breaks, days off, or any period of time you wish to block your clients from scheduling.

✓ **Tip:** Using Block services in conjunction with recurring appointments will enable you to create different hours of operation for different resources.

For example if Bill works 8am to 4pm and Bob works 9am to 5pm then you would set your business hours of operation from 8am to 5pm (see next section for Assigning Hours of Work for Business). To block out 1 hour for Bob from 8am to 9am you would create a service called "Block 1 hour" and schedule a daily recurring appointment (see Scheduling Appointments). This will give Bob 9am to 5pm availability.

### Hours & Days of Work

#### Assigning Hours of Work for Business

Under the Hours of Work heading click "Edit hours for each day of the week". This will open the popup window shown at the right.

#### Assigning Hours of Work for Individual Resources

Using Block services in conjunction with recurring appointments will enable you to create different hours of operation for different resources.

For example if Bill works 8am to 4pm and Bob works 9am to 5pm then you would set your business hours of operation from 8am to 5pm (see Assigning Hours of Work for Business). To block out 1 hour for Bob from 8am to 9am you would create a service called "Block 1 hour" and schedule a daily recurring appointment (see Scheduling Appointments). This will give Bob 9am to 5pm availability.

### Setting the Display Interval

The display interval tells the system how to display the calendar. For example if set at 30 minutes the scheduler will show 8:00am to 8:30am as one time block.

✓ **Tip:** It is very important that the display interval corresponds with the services offered. If your display interval is longer than your shortest service than the calendar will not display properly.

### Assigning Days of Work

Simply select the days you are open for business.

### Resources

#### What is a Resource?

A resource is the entity that you will be scheduling with. Often this will refer to staff resources such as therapists, doctors, councilors, or teachers but resources can also be rooms, locations, or any other entity you choose.

In the example to the right the resource title has been changed to "Batting Cage". Throughout the system "Batting Cage" will replace any reference to a resource.

#### Adding, Editing, & Deleting Resources

The Multiple Resource Version allows you to create an unlimited number of resources. Assigning color codes are optional. Edit or delete a resource by selecting from the list provided.

#### Company Information

All company information that you enter here will be displayed for your viewers in the footer of your system. In the Header section you can select to have the company name displayed as the header title. The email address entered here will be the one copied when appointment confirmations are sent to members.

#### Website Content

##### Main Page Content

The main page is the first page your visitors will see before logging in. Here you have the ability to enter any text or HTML content you wish – images, links, tables, or perhaps a quick introduction to your system. With this feature your scheduler can also be used as a standalone website. Click the edit link and a pop up window will appear.

✓ **Tip:** We've included a link to W3schools at the bottom of each popup window. W3schools is a very easy to use site that provides basics on how to use HTML code.

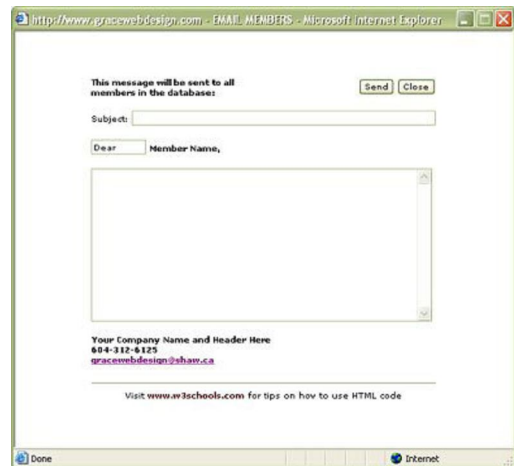
## Registration Page Content

This popup window allows you to modify the message displayed when a visitor registers for an account.

### *Email Content*

#### **Registration Email**

The popup window shown on the right allows you to modify the content of the email message delivered to a new member immediately after they register. The subject, salutation, and message of the email can be edited here. Note your company details will be at the bottom of the email as well.

A screenshot of a Microsoft Internet Explorer browser window. The address bar shows "http://www.gracwebdesign.com - EMAIL MEMBERS - Microsoft Internet Explorer". The main content area displays a form for configuring an email message. At the top, it says "This message will be sent to all members in the database:" with "Send" and "Close" buttons. Below are fields for "Subject:", "Dear: Member Name," and a large text area for the message body. At the bottom, there is a section for "Your Company Name and Header Here" with the phone number "416-312-6125" and email "gracwebdesign@shaw.ca". A footer note says "Visit www.w3schools.com for tips on how to use HTML code". The browser's status bar at the bottom shows "Done" and "Internet".

#### **Confirmation Email**

The confirmation email popup window allows you to modify the content of the email message delivered immediately after an appointment is scheduled. The salutation as well as the opening and closing statements can be edited here. Note the appointment details and your company information will also be included in the email.

### *Other Customization Functions*

#### **Display Options for Main Page**

Display Hours of Work on front page – If selected hours of work will be displayed on the main page below the login box.

Display Services on front page – If selected services will be displayed on the main page below the login box.

Display Login Form on main page – Some businesses manage their scheduling system strictly from their admin section. In this case the member login box is not required and therefore should not be displayed.

Display Member Registration Option – Checking this option will allow members to register themselves. Alternatively some businesses choose to create members from the admin section.

Allow for Password Retrieval – "I forgot my password" will be displayed within the login box allowing your clients to have their password emailed to them.

#### **Days Notice**

Here you can set how many days in advanced clients will be able to schedule appointments. You have the option to set this restriction for administrators as well.

#### **Session Time Out**

This security feature determines how long a user (admin or client) can have an inactive browser open for before the session automatically terminates.

#### **Automatic Send**

Select this option if you want email confirmations sent to the client immediately after appointments are booked.

## Allow Appointment Cancellations Option

The ability for a client to cancel their appointments online can be removed if this option is unchecked.

## Changing Your Account Details

The My Account page will likely be one of the first pages you access after subscribing to the system. Here you can change your username and password to something more secure.

## Calendar Page

The layout of the calendar page was designed to make the process as easy as possible. A mini calendar is provided to allow you to quickly select a date and scroll from month to month. Days of the week that are not open for business are shaded out and when selected the next available day is automatically selected. For convenience a drop down date selector is also available below the mini calendar.

Small dots are shown to represent days where appointments have been scheduled.

<< November 2008 >>						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

## Scheduling Appointments

The scheduling form is to the right of the mini calendar. After selecting the appropriate date this form will take you through the rest of the process – Select a Resource, Select a Service, Select an available time, and enter the client's name, phone, email address and appointment details.

The schedule table displayed at the bottom of the screen is a quick way to view availability and select a time. Click an open time block from the table and the scheduler form will populate with the relevant details. (Multiple Resource Version only)

Once an appointment is made you will immediately see it in the table below.

Tuesday, November 11, 2008

Select a Resource: Charles Weekly View

Select a Service: Service 1 (30 min)

Available Times: 10:00 AM to 10:30 AM Recur: Daily

First Name: Last Name:

Phone 1: Phone 2:

Appointment Notes: (optional) Email:

Reset Submit

## Viewing Options

Your schedule can be displayed in three different views – daily view, all resources daily view (shown below), and weekly view.

Thursday, September 28, 2006 - APPOINTMENTS FOR TODAY													
Time	Mark	Time	Massage Kelly	Time	Resource 1	Time	Resource 2	Time	Resource 3	Time	Resource 4	Time	Resource 5
10:00 AM		10:00 AM	K G	10:00 AM		10:00 AM		10:00 AM		10:00 AM		10:00 AM	
10:15 AM		10:15 AM		10:15 AM		10:15 AM		10:15 AM		10:15 AM		10:15 AM	

## Recurring Appointments


Administrators have the ability to schedule recurring appointments (daily, weekly, biweekly, monthly, or yearly).



✓ **Tip:** Using Block services in conjunction with recurring appointments will enable you to create different hours of operation for different resources.


For example if Bill works 8am to 4pm and Bob works 9am to 5pm then you would set your business hours of operation from 8am to 5pm (see Assigning Hours of Work for Business). To block out 1 hour for Bob from 8am to 9am you would create a service called "Block 1 hour" and schedule a daily recurring appointment (see Scheduling Appointments). This will give Bob 9am to 5pm availability.

### Rescheduling and Canceling Appointments





Every appointment listed will have the option to reschedule or cancel. All canceled appointments are recorded in the Cancellations table which can be access from the Appointments page by clicking the  icon.













When rescheduling an appointment the information from the canceled appointment is passed to the scheduler form making it easy to make changes and reschedule. Rescheduled appointments are also maintained in the Cancellations table.

### Printing Schedules



For a printable copy of a resource's appointments click the  icon from the daily view screen. This will display a popup window with your printer options ready for print.

### Appointments Page


Search:  or  for Batting cage      

Search results for ' test '								
Date	Time	Batting cage	Service	Customer	Contact	Appointment Notes	Edit	Delete
Thursday, November 13, 2008	8:30 AM to 9:00 AM	Cage 1	Medium Meeting	Demo Member	demo@test.com	testing		
Thursday, November 13, 2008	9:00 AM to 9:30 AM	Cristina	Service 1	Demo Member	demo@test.com	testing edit		
Monday, November 10, 2008	10:30 AM to 11:00 AM	Cage 2	Bruce	Demo Member	demo@test.com	testing time		
Sunday, November 09, 2008	8:00 AM to 9:00 AM	Cage 1	Service 2	test				
Sunday, November 09, 2008	1:00 PM to 1:30 PM (Weekly)	Cage 2	Bruce	Debbie Test				
Friday, November 07, 2008	11:30 AM to 1:00 PM	Charles	Service 3	Demo Member	demo@test.com	test		

### Editing & Deleting Appointments


Your appointments are listed based on the search and sort queries you have sent. With each record there is an edit  and delete  icon. Click edit to populate all fields in a form where you can make changes accordingly. Click delete and you will be prompted with an alert box to confirm the deletion.

### Search & Sort Features


As you can see from the screenshot above your scheduling system can run reports based on search terms, month or year, or for a specific resource. In the example above we've listed all appointments with the search term "test" in the record. Resource, service, contact, email, and appointment notes are all searchable fields. The  icon will display all records in the database.

Click the column heading to see the current table sorted alphabetically by that field.

## Printing

Printing from the browser is not always ideal so your system provides a printable version of the current report displayed. Click the  icon and a popup window will display with your printer options ready for print.







## Exporting to Excel

To export your reports in Excel click the  icon.


## Members Page

Search Filter:



MEMBERS IN DATABASE									
ID	First Name	Last Name	Email Address / User Name	Main Phone	Alternate	Password	Access	Edit	Delete
80	Admin	Member	admin			admin	Admin		
278	Demo	Member	demo@test.com			demo	Client		
280	John	W	jaw@med.unc.edu			8813	Client		
279	Margaret	Chandler	margaret.chandler@hitsg.com			1673	Client		
281	ME	ME	ME@HOME.COM			1234	Client		

## Adding, Editing & Deleting Members


Add members to your database by clicking the  icon. You can assign one of three access options – Admin, Client, or Limited.

**Admin accounts** will have full access to the system and everything we've covered in this manual.

**Client accounts** are able to schedule appointments from the client section of the system (see Client User Manual).

**Limited accounts** can view all appointment details as if they had admin access but there are absolutely no scheduling or management options with this account type. Limited accounts are commonly used for staff viewing.

## Sending Mass Emails

Click the  icon to open the mass email form. You can send emails to all admin users, all clients, or all accounts in the database. You can also send emails to individual accounts by clicking the email address in the member table.

## Search & Sort Features


Searchable fields in the members table include first and last name, email address, phone number, and password.

Click the column heading to see the current table sorted alphabetically by that field.

## Printing

Click the  icon and a popup window will display with your printer options ready for print.

## *Exporting to Excel*

To export your reports in Excel click the  icon.

## Website Integration

In most cases Grace Schedules subscribers will provide a link on their website redirecting their visitors to their scheduling system (i.e. [www.graceschedules.com/\[yourbusinessnamehere\]](http://www.graceschedules.com/[yourbusinessnamehere])).

If you want the scheduler to appear as though it functions within your site your website developer can utilize frames. To actually have the system run within your site you can purchase the scripts for your system and code it directly into the pages of your site. This will require someone with advanced ASP and HTML knowledge. Grace Schedules will be happy to provide a free quote on the project upon request.

## Customization

We've designed our scheduling systems to be dynamic so that you can easily modify the look and function to meet the needs of your business. However we realize that all businesses are different and therefore your requirements may be more specific.

In these cases we can customize the scheduler until it is exactly what your business needs. Please send us your system requirements and we'll be happy to provide a free quote on the project.

## Reseller Program

To qualify as a reseller of the single and multiple resource versions you must first purchase the version you wish to sell at its normal price. Once your initial purchase is made, each additional scheduler that you purchase will be eligible for the reseller discount. A 20% discount is applied to the regular price of each system.

## Helpful Links

Customer Testimonials - [www.graceschedules.com/testimonials.asp](http://www.graceschedules.com/testimonials.asp)

Frequently Asked Questions - [www.graceschedules.com/faq.asp](http://www.graceschedules.com/faq.asp)

Online Demos - [www.graceschedules.com/demo.asp](http://www.graceschedules.com/demo.asp)

Features - [www.graceschedules.com/features.asp](http://www.graceschedules.com/features.asp)

Pricing - [www.graceschedules.com/pricing.asp](http://www.graceschedules.com/pricing.asp)

W3Schools Online Web Tutorials - [www.w3schools.com](http://www.w3schools.com)