

SnapAppointments

User Guide

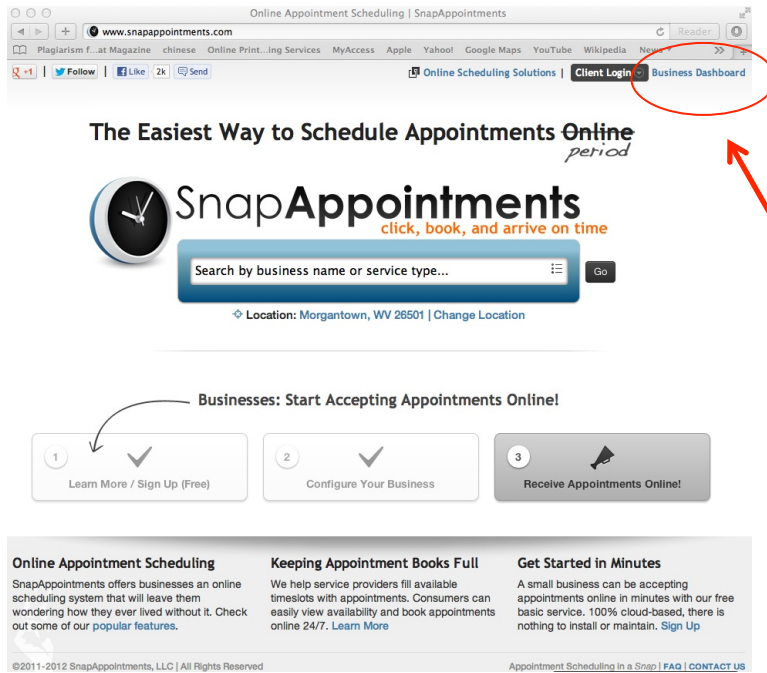
Getting to Know the Administrative Site

This tutorial will walk the user through the main parts of our administrative page on SnapAppointments.

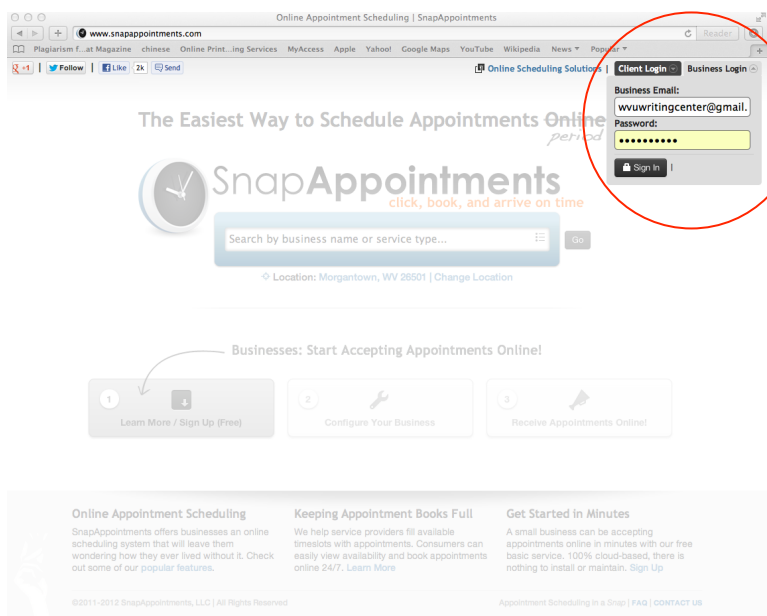
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Logging on to the Administrative Site



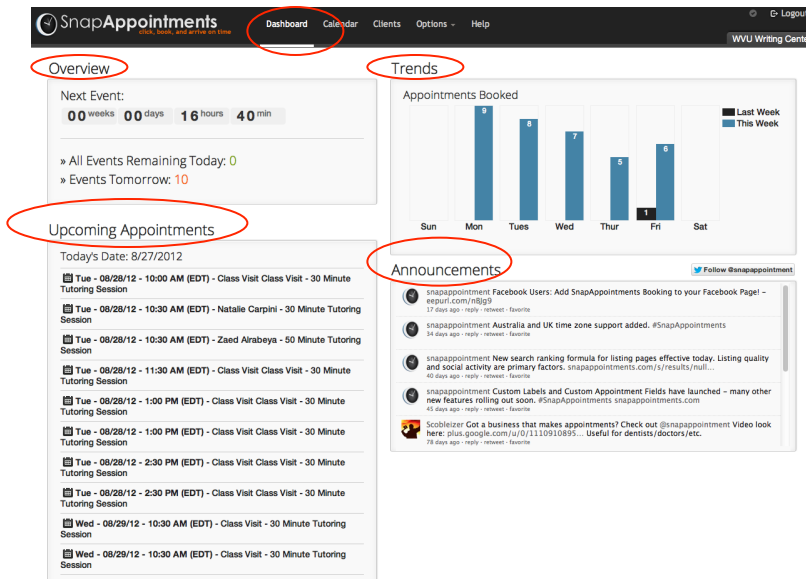
After going to www.snapappointments.com, click 'Business Dashboard' up in the top right corner of the webpage.



A drop-down login window will appear in the top right corner of the webpage. Enter the following information into the box:

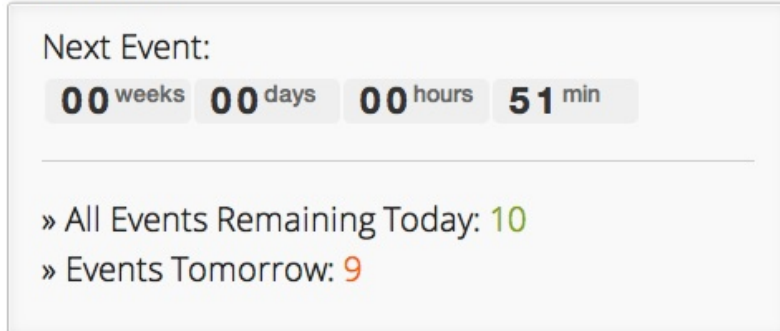
Business Email:
wuwritingcenter@gmail.com
Password:
bakedgoods

The Dashboard



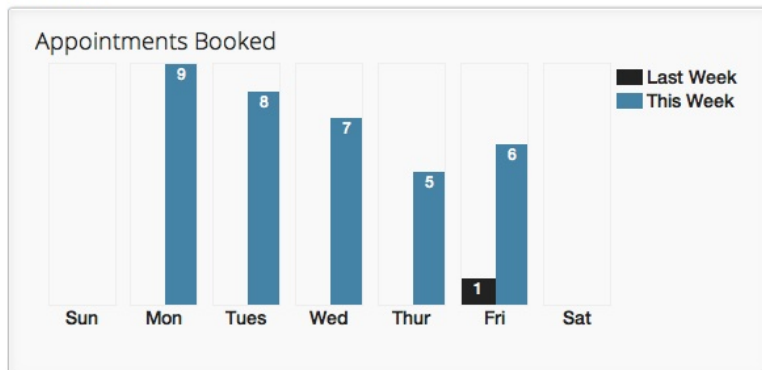
A successful login will bring you to the homepage, also called the 'Dashboard.' The main features of the homepage are 'Overview,' 'Trends,' 'Upcoming Appointments,' and 'Announcements.'

Overview



'Overview' provides us with a summary of how many appointments we have left that day and how many we have the next day. It also features a live countdown until the next appointment.


Trends





'Trends' shows a bar graph comparing the number of appointments in the present week to the number of appointments from the previous week. In this graph, the Writing Center was not open the previous week, which is why there is only one appointment.


Upcoming Appointments


Today's Date: 8/28/2012


 **Tue - 08/28/12 - 10:00 AM (EDT) - Class Visit Class Visit - 30 Minute Tutoring Session**


 **Tue - 08/28/12 - 10:30 AM (EDT) - Natalie Carpini - 30 Minute Tutoring Session**


 **Tue - 08/28/12 - 10:30 AM (EDT) - Zaed Alrabeya - 50 Minute Tutoring Session**


 **Tue - 08/28/12 - 11:30 AM (EDT) - Class Visit Class Visit - 30 Minute Tutoring Session**


 **Tue - 08/28/12 - 1:00 PM (EDT) - Class Visit Class Visit - 30 Minute Tutoring Session**

 **Tue - 08/28/12 - 1:00 PM (EDT) - Class Visit Class Visit - 30 Minute Tutoring Session**

 **Tue - 08/28/12 - 2:30 PM (EDT) - Class Visit Class Visit - 30 Minute Tutoring Session**

 **Tue - 08/28/12 - 2:30 PM (EDT) - Class Visit Class Visit - 30 Minute Tutoring Session**


 **Wed - 08/29/12 - 10:30 AM (EDT) - Class Visit - 30 Minute Tutoring Session**


 **Wed - 08/29/12 - 10:30 AM (EDT) - Class Visit - 30 Minute Tutoring Session**


'Upcoming Appointments' shows just that—appointments already scheduled for the day and, if there are not that many, some appointments scheduled for tomorrow. The time and date of the appointment, including the name of the tutee, are listed here. As you can see, this week is full of class visits and very few appointments.


Note: Tutors are not listed here in the current version of SnapAppointments. Refer to the Calendar to see which appointment belongs to whom.


Announcements


 [Follow @snapappointment](#)

 snapappointment Facebook Users: Add SnapAppointments Booking to your Facebook Page! – eepurl.com/nBJg9
17 days ago · reply · retweet · favorite

 snapappointment Australia and UK time zone support added. #SnapAppointments
34 days ago · reply · retweet · favorite

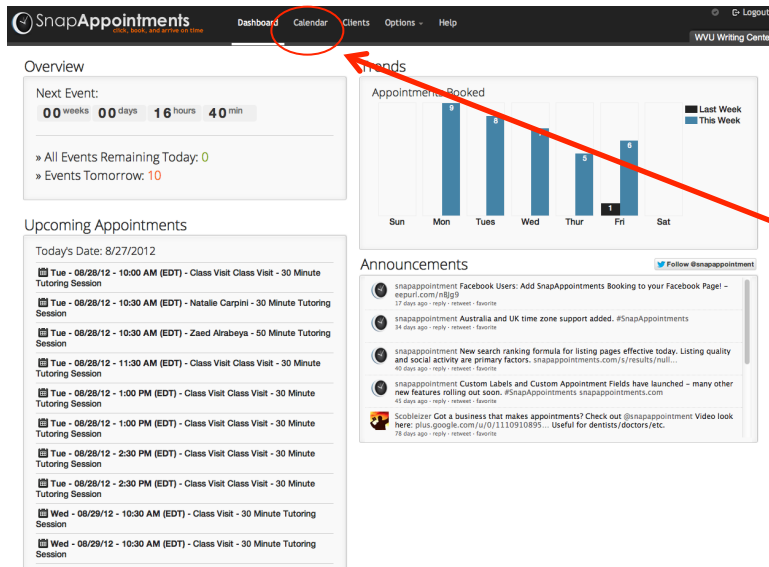
 snapappointment New search ranking formula for listing pages effective today. Listing quality and social activity are primary factors. snapappointments.com/s/results/null...
40 days ago · reply · retweet · favorite

 snapappointment Custom Labels and Custom Appointment Fields have launched – many other new features rolling out soon. #SnapAppointments snapappointments.com
45 days ago · reply · retweet · favorite

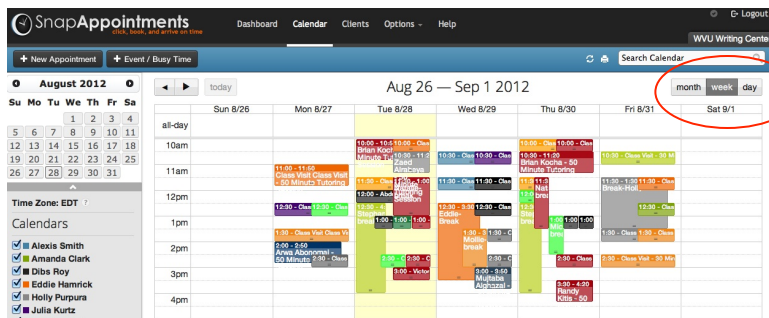
 Scobleizer Got a business that makes appointments? Check out @snapappointment

'Announcements' is also self-explanatory. It shows announcements from our host website, SnapAppointments. It also features an option to follow SnapAppointments on Twitter.

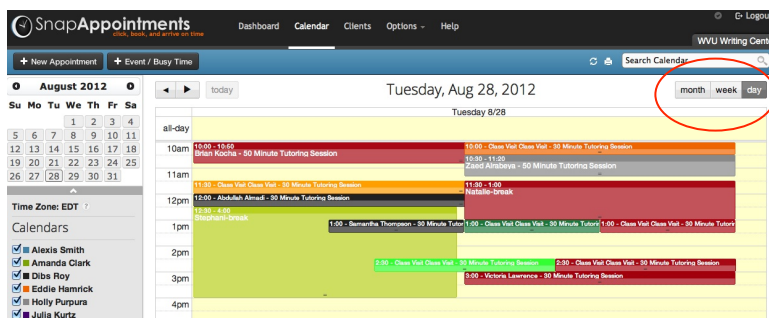
The Calendar



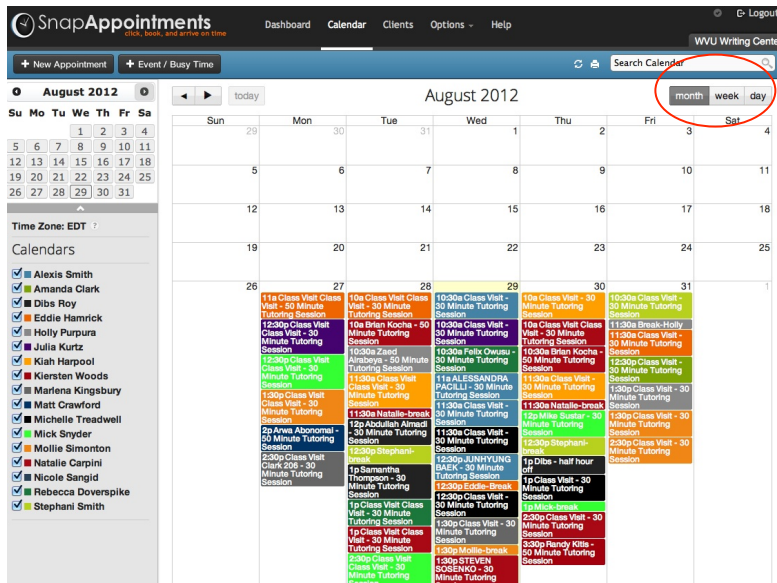
From the 'Dashboard,' click 'Calendar' to bring you to the appointments calendar.



On this page, there are three different ways to view the calendar. The 'Weekly' view is the default view, and it is also the hardest to read!



The 'Day' view is slightly easier to read, but it is still not the best.



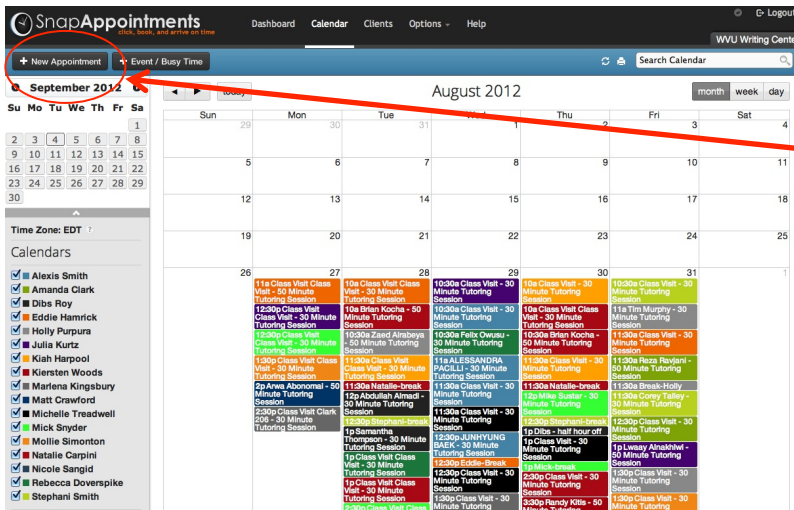
The 'Month' view, as you can see, is the easiest schedule to read.



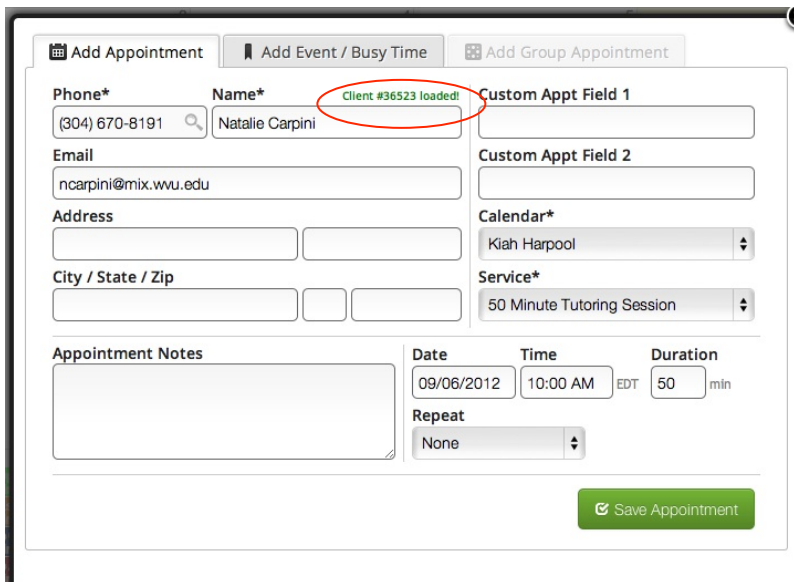
To the left of the calendar, all of the tutors are listed. Next to each tutor is a small block of color. Tutors can find their appointments on the calendar based on their colors.

Note: some tutors share the same or similar colors. Make sure to look at the paper schedule on the desk to clarify which tutor has an appointment.

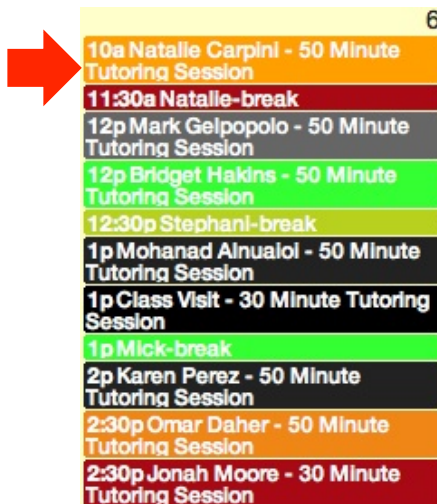
Scheduling an Appointment



To schedule an appointment on the calendar page, click 'New Appointment' at the top left corner of the page.



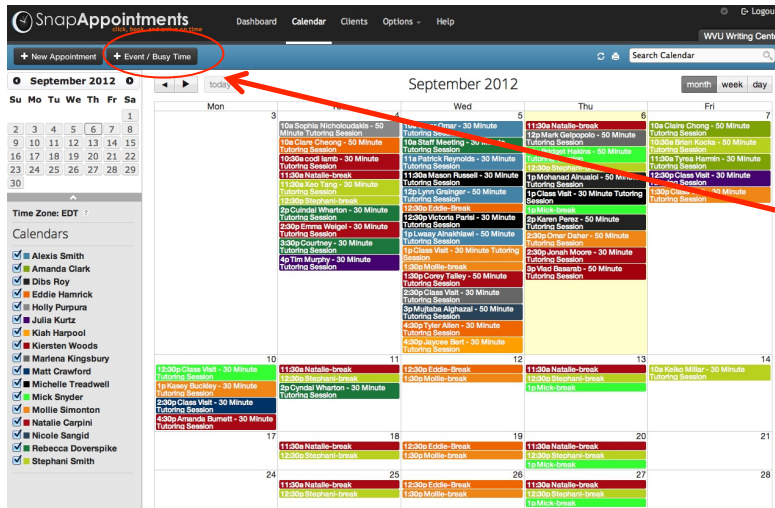
When the window pops up, enter the student's information. If the student has made appointments with us before, their information will load as soon as the phone number is entered. The system also assigns a number to each client. Under 'Calendar,' choose the tutor the student will be working with based on who is available at that time. Then, choose whether the appointment will be 30 or 50 minutes long. Finally, confirm the date and time for the appointment before pressing 'Save Appointment.'



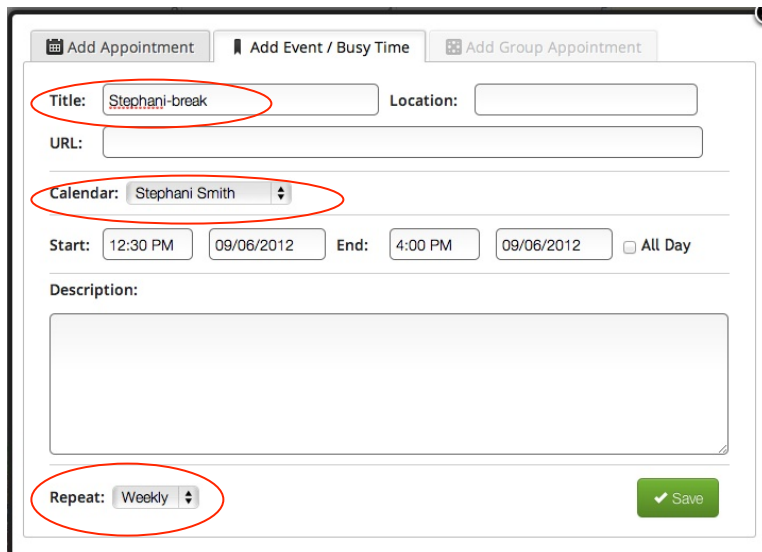
After saving the appointment, it shows up on the calendar in Kiah's color, which is light orange.

Note: to delete an appointment, simply click on it, and there will be an option to either edit or delete it.

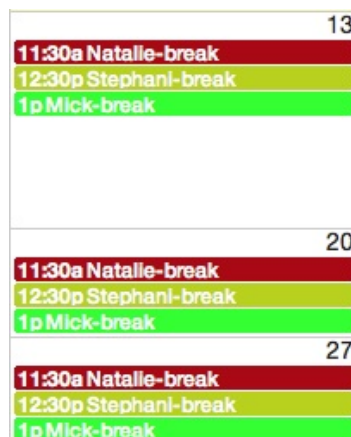
Scheduling a Break



To schedule a break for a tutor (if the tutor needs to leave the Center for class, etc.), click 'Event/Busy Time' at the top left corner of the screen.



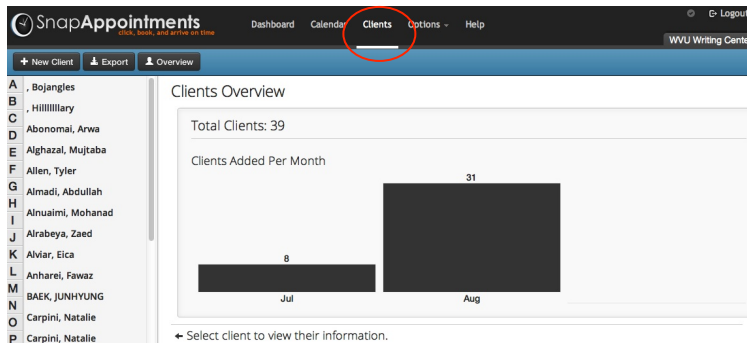
When the window pops up, give the break an appropriate title to appear on the Calendar. Make sure to select the right tutor from the 'Calendar' drop-down menu. For instance, Stephani's break is scheduled in Stephani's calendar. Select the appropriate times for the break, and be sure to select 'Weekly' from the 'Repeat' drop-down menu at the bottom. To finish, click 'Save.'



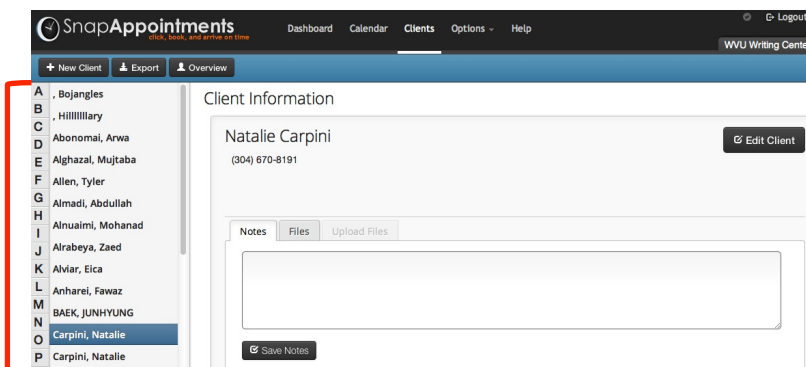
Note: selecting 'Weekly' means that the break will repeat at that time the next week. If the break occurs on an additional day, such as on Tuesdays *and* Thursdays, you will need to create a different break for the other day and designate it as 'Weekly,' as well.

Breaks will appear on the calendar for that day every week.

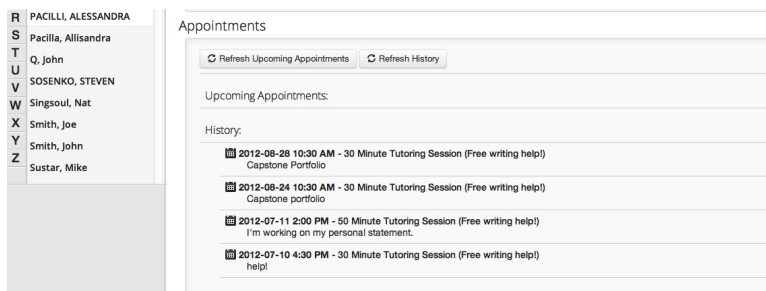
Clients



If you click 'Clients' at the top of the page, it will bring you to a page that lists all of the students who have made appointments with us. It also gives a visual of how many clients are added per month.



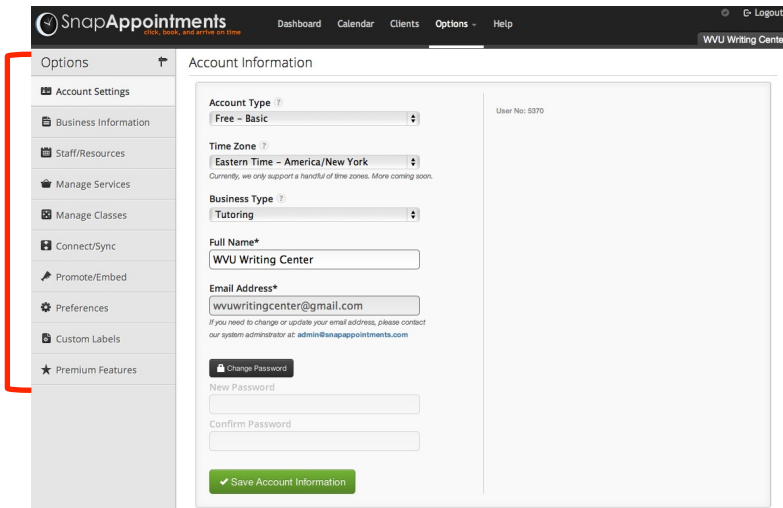
If you click on a name, it will show their information under 'Client Information.' You also have the option of writing a note about the student, if needed.



Scrolling down, you see the appointment history of the client you selected. Also, if the student has an appointment scheduled for the future, there will be an appointment listed under 'Upcoming Appointments.'

Options

Account Settings

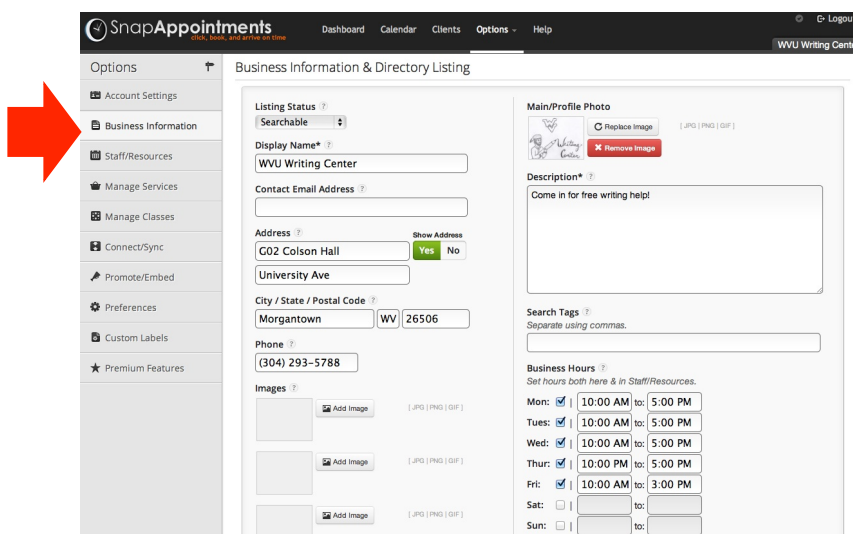


The 'Options' page deals with all the technical parts of the website. Here, you can edit different aspects of our services under 'Account Settings,' 'Business Information,' 'Staff/Resources,' 'Manage Services,' 'Promote/Embed,' 'Preferences,' and 'Custom Labels.'

Note: for our purposes, we will not be using 'Manage Classes,' 'Connect/Sync,' and 'Premium Features.'

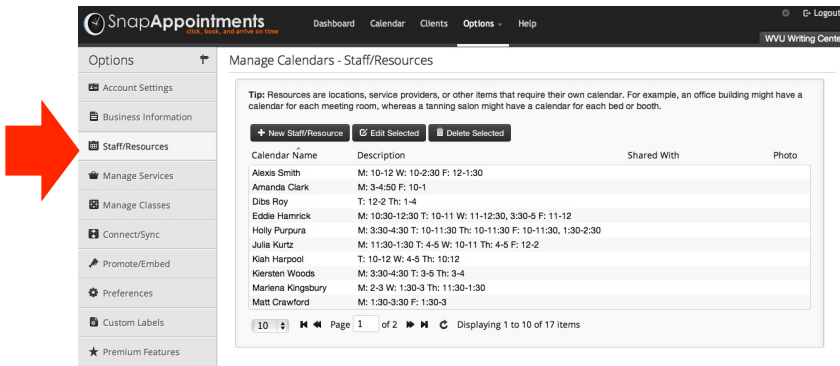
The 'Account Settings' page is the default option. Here, you can edit the type of business we run and our name/email. More than likely, you will never edit anything on this page.

Business Information

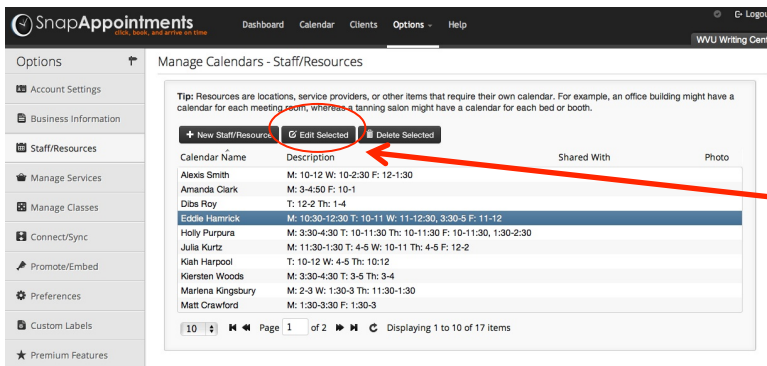


On the 'Business Information' page, you can change information such as our display name, email, address, and phone number. You can also change our hours of operation and edit our description.

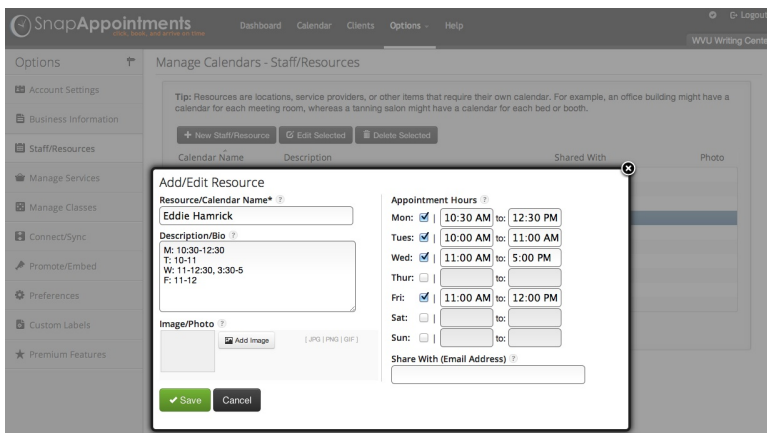
Staff/Resources



The 'Staff/Resource' page allows you to manage the times that tutors are available. You can also use this page to add and delete tutors.

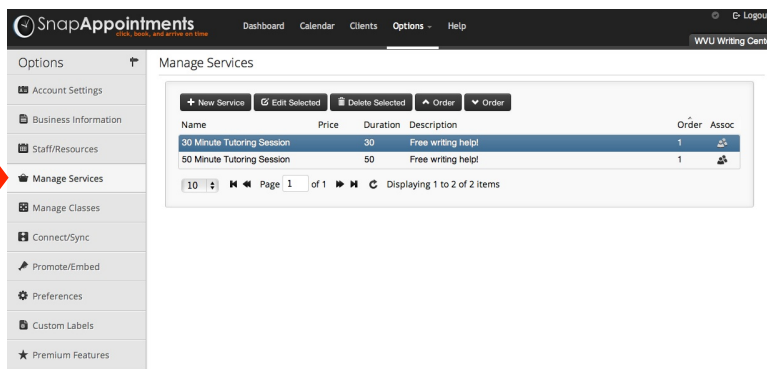


To edit a tutor's availability, click on a tutor's name and then click 'Edit Selected.'



As shown, a box will pop up allowing you to edit a tutor's information. Click 'Save' when you are finished.

Manage Services

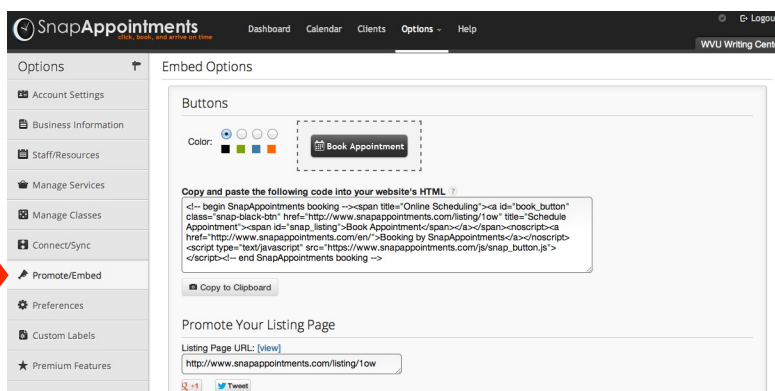


Name	Price	Duration	Description	Order	Assoc
30 Minute Tutoring Session	30	30	Free writing help!	1	
50 Minute Tutoring Session	50	30	Free writing help!	1	

The 'Manage Services' page allows you to edit the services we offer. Since we only offer 30 and 50 minute appointments, there will never be a need to edit these services.

Note: if a student asks to work for an hour and a half or two hours, you will need to create that appointment on the 'Calendar' page.

Promote/Embed



```
<!-- begin SnapAppointments booking --><span title="Online Scheduling"><a id="book_button" class="snap-black-btn" href="http://www.snapappointments.com/listing/1ow" title="Schedule Appointment"><span id="snap_listing">Book Appointments</span></a></span></script><a href="http://www.snapappointments.com/en/">Booking by SnapAppointments</a></script><script type="text/javascript" src="https://www.snapappointments.com/js/snap_button.js"></script></-- end SnapAppointments booking -->
```

The 'Promote/Embed' page lists options for embedding our SnapAppointments booking module onto our website. Our first option is to embed a button on our website that takes the user straight to the booking module. We can also use the link provided to promote our listing page on SnapAppointments.com.

Booking Module

Optionally, add the SnapAppointments booking module to your website:

▼ Select Service

50 Minute Tutoring Session

30 Minute Tutoring Session

← Please Select Service

[Continue >](#)

▶ Select Tutor

▶ Date & Time

▶ Client Information

▶ Confirmation


Online Appointment Scheduling by SnapAppointments

Copy and paste the following code into your website's HTML [?](#)

```
<!-- begin SnapAppointments booking --><iframe
src="https://www.snapappointments.com/app/appointment/module/5370" width="590"
height="490" title="Appointment Scheduling" frameborder=0 border=0 scrolling=no></iframe>
<noscript><br/><a href="http://www.snapappointments.com" target="_blank"/>Online
Appointment Scheduling</a> by <a href="http://www.snapappointments.com/en/"
target="_blank"/>SnapAppointments</a></noscript><!-- end SnapAppointments booking -->
```

 Copy to Clipboard

Facebook App

 [Connect using Facebook](#)

Accept appointments directly from Facebook.
Click the button above to add the SnapAppointments booking module to your Facebook page.

Note: You must already have a [Facebook Page](#) to use this feature.

QR Code



Right-click the QR code and select "Save Image As..."

A QR (Quick Response) Code is a 2D barcode that can be read by special software on a camera phone, usually as a free download on a smart phone. Just search for "QR scanner" in the iTunes or Droid app store. We recommend "Scan" for iPhone/iPad and "QR Droid" for Android devices.

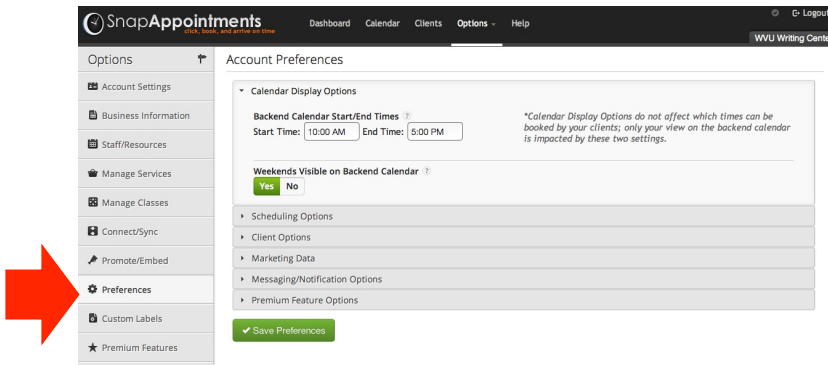
Chances are, your clients already have a QR scanner on their phone and know how to use it. To drive more users to your SnapAppointments listing page, print this QR code and display it everywhere. For example, in your storefront window, on your business cards, or on marketing materials.

More Information on QR Codes: [\[video\]](#)

The second option is to embed the entire booking module into our website.

Finally, it gives us an option to utilize Facebook in booking appointments. It also provides a QR code that will take students straight to our listing page.

Preferences



On the 'Preferences' page, you can change calendar, scheduling, client, marketing, and notification options. In the 'Calendar Display Options' section, you can change the times displayed on the 'Calendar' page. Right now, the times that are shown are the times the Writing Center is open. There is also an option to hide the weekends from the 'Calendar' page.

Account Preferences

Calendar Display Options

Scheduling Options

Address Fields on New Appointments ?
 Yes No

Maximum Days Out an Appointment Can Be Booked* ?
 Days

Appointment Lead/Notice Time* ?
 Days:
 Hours:
 Minutes:

Days Hours Minutes *Use "0" Days to allow same-day appointments

Appointment Time Slot Interval ?
 Minutes *Only affects how available times are displayed and is unrelated to appointment duration(s)

Default Note To Clients ?

Additional Appointment Info Field(s) on Booking Module ?
 Label:
 Label:

Additional Client Info Field(s) on Booking Module ?
 Label:
 Label:

Under 'Scheduling Options,' you have the option to add an address field to the booking module. You can modify the amount of days before you can schedule an appointment. You also have the option to incorporate a 'Notice Time' for appointments. Since we allow same-day appointments, we will not be using this option. You can add a note for clients to see, and you can also add different fields to the booking module.

Account Preferences

Calendar Display Options

Scheduling Options

Client Options

Client Sort Order ?

Marketing Data

Messaging/Notification Options

Premium Feature Options

Under 'Client Options,' you have the option to sort clients by their last names or first names.

Account Preferences

Account Preferences interface showing the Marketing Data section. The section is expanded, revealing options for collecting referral sources and a text area for listing them.

- Calendar Display Options
- Scheduling Options
- Client Options
- Marketing Data
 - Collect "Referral Source" when adding client ?
 Yes No
 - Referral sources (one per line) ?
- Messaging/Notification Options
- Premium Feature Options

Under 'Marketing Data,' you can list different referral sources so that clients can tell us how they heard about us when they schedule an appointment.

Account Preferences

Account Preferences interface showing the Messaging/Notification Options section. The section is expanded, revealing options for sending SMS/text reminders, including business addresses, and additional email recipients.

- Calendar Display Options
- Scheduling Options
- Client Options
- Marketing Data
- Messaging/Notification Options
 - Send SMS/Text Reminders to Clients ?
 Yes No
 - Send SMS/Text & Email Reminders ?
1 Hour Before Appointment
 - Include Business Address in Appointment Notification Emails
 Yes No
 - Include Note in Appointment Notification Emails ?
 - If you want email notifications sent to email addresses in addition to your primary email, specify them in a comma-separated list below (e.g. email_1@example.com, email_2@example.com)*
 - Additional Email Recipients (CC) ?
 - Additional Email Recipients (BCC) ?
- Premium Feature Options

Under 'Messaging/Notification Options,' you have the option of turning on/off text message reminders to clients. You can also change when the client will receive the text. Further, you can decide whether or not to include our address in the reminder email, and you can designate additional email addresses other than our primary to receive notification emails.

Custom Labels

Options

- Account Settings
- Business Information
- Staff/Resources
- Manage Services
- Manage Classes
- Connect/Sync
- Promote/Embed
- Preferences
- Custom Labels**
- Premium Features

Customize

Custom Labels

Custom Labels allow you to optionally rename certain areas of SnapAppointments for a more customized feel. For example, if operating a medical clinic, you might choose to rename "Clients" to "Patients".

Rename "Client" to:

Rename "Service" on the Booking Module to:

Rename "Staff/Resource" on the Booking Module to:

Rename "Address" on the Booking Module to:

On the 'Custom Labels' page, you have the option of renaming 'Client,' 'Service,' 'Staff/Resource,' and 'Address.'

Help

Support Center

Have a Question? Ask or enter a search term here.

Browse by Topic

My Account

- 4 ARTICLES [VIEW ALL](#)
- How do I reset my password?
- How do I change my password?
- How do I change my email/username?
- How do I delete my SnapAppointments acco...

General Information

- 16 ARTICLES [VIEW ALL](#)
- Managing Your Calendar
- Managing Your Clients
- The Setting Sections Explained
- How do I cancel/delete an appointment?
- Are my clients notified when appointment...

RECENT Q&A [VIEW ALL](#)

- Changing Button Color on Website Embed a...
- Staff
- When Staff Has Split Shifts
- Calendar embedded on web page
- how to set an sms reminder from an outsi...

Video Tutorials

- 1 ARTICLE [VIEW ALL](#)
- Getting started with SnapAppointments

Product Information

- 3 ARTICLES [VIEW ALL](#)
- What We Do
- SnapAppointments Cost
- Security

Contact Us

Post a Public Question

Email Us

Follow our Tweets

about 25 days ago
Facebook Users: Add SnapAppointments Booking to your Facebook Page! - <https://t.co/PjPPNNGf>

about 42 days ago
Australia and UK time zone support added. #SnapAppointments

about 48 days ago
New search ranking formula for listing pages effective today. Listing quality and social activity are primary factors. <https://t.co/gR0GfD06>

Questions? Click to chat!

The 'Help' page provides a few different ways to find the help you need. You can type a question or key word in the search bar, browse for answers by topic, or even contact SnapAppointments by email. You can also post a public question so other users can answer.

Sometimes there is an option for a live chat with a SnapAppointments representative. If this option is available, take advantage of it. It has proved to be very helpful.