

SET UP INSTRUCTIONS FOR FIRST TIME USERS

When you Sign Up for ebookaplace, you will receive an email with two (2) links:

1. a Booking Form link that you will Place on your Website for your customers to make appointments
2. a Control Panel link that you will use to Set Up your Availability for your customers to make appointments

The email will also contain your login and password for the control panel.

Now, perform the following simple tasks to Set Up your Availability and Put Up your Booking Form on your Website. This will also help you to get familiar with other ebookaplace features. Please login to the Control Panel with your username/password: <http://my.ebookaplace.com>

STEP 1: CHANGE PASSWORD

1. On the top right, click on my ebookaplace -> Preferences. Check your details and change your password on this page. Save your changes.
2. Once you are familiar with the features of ebookaplace, you can come back to this page anytime and make changes to your preferences.

STEP 2: ADD SYSTEM USERS

1. On the left, click on Business -> System Users. You will see your user name and email on this page. Click on Edit. This page allows you to check and change your details as well. Save your changes.
2. To add a new system user, click on the left, Business -> System Users. Click Add New System User and input the user's details. Save your changes. Your new system user will be sent an email with their login and system-generated password.

STEP 3: SET UP YOUR BUSINESS

Quick Setup

There are two ways to set up your business. A quick set up wizard is available by going to the left, clicking on Business -> Quick Setup and following the prompts. Quick setup allows you to enter your business details, business hours, areas/services/people for customer appointments, and simple appointment schedules. Use Quick Setup if your availability is the same in time and duration each day.

Customised Setup

Alternately, you can perform a more customised set up of your business.

1. On the left, click Business -> Details. Check your address and contact information. Save your changes.
2. Click on the Operations tab at the top. You might like to upload some photos (note the photo specifications). These photos will appear on automatic notifications that your customers can receive. Save your changes.
3. Click on the Terminology tab at the top. You might like to change the terminology that is used by the system with customers to reflect your own terminology.
4. On the left, click on Business -> Opening Hours. Specify your opening hours. Save your changes.

Now that you have set up your business details, you can add areas/services/people for your customers to book.

1. On the left, click Areas -> Areas. Add the areas/services/people for your customers to book by clicking Add New Area.
2. Enter the name of the area/service/people (e.g. Mary Smith, Peter Jones).
 - a. If you would like to classify your areas/services/people, you can enter an area/service/people category (e.g. Women's Hair, Men's Hair).
 - b. You might like to upload a photo (note the photo specifications).
 - c. Write a brief description of the area/service/people.
 - d. You may want to upload an attachment to go with the area/service/people.
 - e. You can also enter some terms and conditions for your customers.
 - f. Save your changes.
3. Click on the Settings tab at the top. Specify the rules for customers and their appointment bookings by selecting a response for each question.
 - a. Often, when a booking is made it is automatically confirmed.
 - b. You would also allow non-members to make bookings so that your availability is open to the public.

- c. If you would only like a specific group of customers (e.g. VIP customers) to book an area/service/people, then make the area/service/people require membership. Enter the members into the system so they have access. The system automatically notifies members.
 - d. Specify you notification periods, whether you allow repeats, and the appropriate customer actions.
 - e. Save your changes.
4. Click on the Sessions tab at the top. There are three ways to show your availability:
- a. You can enter each session individually (e.g. 9am – 10am, 1pm – 2pm);
 - b. You can enter a large block and break up the block into sessions (e.g. 9am – 1pm with a session every hour, 9am – 10am, 11am – 12 noon, 12 noon – 1pm); and/or
 - c. You can use a combination of both (e.g. 9am – 10am, 1pm – 5pm with a session every hour).
 - d. Enter the maximum number that you would like to be able to book the session.
 - e. To enter each session individually, enter the start and end time and click Insert.
 - f. To enter a large block and break up the block into session, enter the start and end time for the block, then click on the dropdown to select Yes to allow booking intervals within session for customers. Enter the time between sessions (e.g. every 15 minutes, every 30 minutes etc.), followed by the duration of the session (e.g. 30 minutes, 60 minutes).
 - g. You can also create and name different durations to suit the area/service/people that you are providing, and have the customer choose. Be sure to click Insert after you make your selections.

STEP 4: OTHER FEATURES

There are other features that you can use to enhance customer service.

1. On the left, click Areas -> Notifications to set up automatic notifications, reminders and thank you messages. Follow the prompts on each tab.
2. On the left, click Areas -> Special Offers to set up special offers that you can apply to individual or combinations of areas/services/people. Follow the prompts on the page.
3. On the left, click Areas -> Questions to set up questions to ask customers prior to completing their bookings. These questions appear on the booking form during the booking process and allow you to collect information prior to their appointment. Questions can apply to individual or combinations of areas/services/people. Click Add New Form, follow the prompts, make it active, and you can add various instructions and questions for your customers. Click Add Heading or Add Question after you have entered the question to save and activate the question.



STEP 5: PLACE YOUR BOOKING FORM ON YOUR WEBSITE

The instructions to place your booking form on your website are contained in the control panel.

1. On the top right, click my ebookaplace -> Integration. Click on the Website Integration tab at the top.
2. Choose whether you would like to embed the booking form on your website or have it come up as a popup.
3. Copy and paste the instructions into the appropriate place on your website. You will need access to modify your website. Your web host will also assist you with this.
4. If you have area/service/people categories, click Show default category, and chose the category using the dropdown (e.g. Women's Hair, Men's Hair). Copy and paste the instructions into the appropriate place on your website. You will need access to modify your website. Your web host will also assist you with this.