

Set up Guide

In order to setup your calendar, you are required to login as the Vendor at the Member Login screen. Any fields that are not mentioned in this guide are for more detailed or specific setup and are not required for basic functioning. Please watch the tutorial videos for more details or contact our support team.

After you are logged in as the "Vendor" please follow these steps:

Calendar Settings

To customize the calendar setup and available features move your mouse over "**Administration**" and click on "**Vendor Admin**".

1. Select the web address that you would like to use for your calendar ie. www.mybookingcalendar.com/companyname.
2. Verify your company information and make any necessary changes (e.g. username & password, e-mail address).
3. Go through the "Time/Date, Currency Settings" heading to adjust the settings for your location.
4. Adjust the view of the calendar your customer will see under the "**Calendar Display Options**" heading.
5. Enable and disable specific features (if needed) under the "[Optional Features](#)" heading.

By default the settings are set to accept bookings online and the Vendor does not need to confirm or approve any bookings.

Click on "**Update**" at the end of the page to save changes.
For more information on Vendor Admin please watch the tutorial videos.

Appointments Setup

First, set up the “Services” you offer.

To create your service list, move your mouse over “Administration” → “Schedules” and click on “Service Admin”

Click on “Add a New Service” or select an existing service from the drop down menu and click “View/Modify”.

1. Enter the name of the service. You can enter a different name for the “internal use service name” or enter the same name again. We recommend including the length of the service in the name so your client knows how long the appointment is.
2. Enter the length of the service and any break or prep time that you need between services/treatments.
(This will not be seen by your customer, this is why we recommend that you enter duration time in the “Name of service” or “Description” field.)
3. Enter any costs or taxes that you want to include. If all your services require taxes, check off the “Use taxes from schedules” box and you will not have to enter them for each service.
(If no cost is entered, there will be no cost shown in booking screen or receipt.)
4. Enter a description of the service or a note for your customer that the service time includes a break. For example, Note: This is a 30 min session which requires a 45 min opening to allow for preparation for the next session.
5. Click on “Update”

TIP: *If you create a new service and your schedule is already created, you will need to view/modify your “Schedule” and check off the new service before it will appear on your calendar.*

Second, create a schedule for yourself or your staff.

Move your mouse over

"Administration" → "Schedules" and click on **"Schedule Admin"**

Note: On this initial schedule admin page you can enter your location, driving directions etc and copy this into each schedule to avoid re-entering the information. You can override this for any schedule requiring different information.

Click on **"Add New Schedule"**

or select an existing schedule and click **"View/Modify"**.

1. Enter the name of the employee or schedule in the first two boxes. (E.G. Jackie or Tanning Bed)
2. Select the number of days before an appointment you would like your clients to receive email reminders.
3. Select how close to an appointment your clients can book with you.
4. Select the amount of time before an appointment that you would like your clients to be able to cancel with you.
5. Select how close to the appointment your clients can reschedule themselves.
6. Select how far in advance your clients can book.
7. Under the **"Services provided by this Service Provider/Facility"** heading check off all services that this person/schedule will be offering.
8. Under the **"Schedule Availability"** heading:
Check off the month(s) that you want to have access to.
Select your time interval for taking appointments ie. 30 min=9am, 9:30am, 10am etc
Select the days and times that this schedule is accepting appointments.
Select the days and times that this schedule is accepting appointments.
Select the number of appointments you will take per time slot. (default is 1)
9. Under the **"Customizable Fields for Confirmations and Emails"** heading, if you have filled out the location and driving directions on the previous page check off the "Use Default Information" box or fill in your location, directions and cancellation policy. You can disable any of these fields. For example uncheck the "Enable Location" box.
10. Click on **"Update"**

Tip: To adjust particular times on your schedule or to take days off without affecting your regular schedule, select the appropriate schedule and click on "View/Modify". To change days off/on, click on the "Day Off/On Administration". To change your working hours for certain days, select "Start/Finish Time Admin".

Click on **"Appointments"** along the top of the screen and this will take you back to the main calendar so you can view your changes.

Events/Workshops Setup

To create your events/workshops
move your mouse over
“**Administration**” → “**Events**” and click on “**Event Admin**”.

Click on “**Add a New Event**”
or select an existing event from the drop down list and click “**View/Modify**”.

1. Enter the name of the event/workshop in the first two boxes.
2. In the "Event Description" field enter some details about the event. For example is it a one day event or is the customer booking for a 6 week course.
3. Select the "Cost Type Admin" button. (You must do this even if your cost is zero). Select "Add New Cost Type". Enter a Cost Type name, ie. Number of Adults, Number of Members and the cost. You can setup multiple cost types. Select "Back to Events".
4. Select the days and months that this event is available, If it runs for only a few days for part of a month also enter the dates into the Start and Finish Date fields.
5. Select a “Start/Finish Time” for the event. This will display in emails and will affect the time frames for when clients can book and reschedule their booking.
6. Fill in your location, driving directions and cancellation policy. You can disable any of these fields. For example uncheck the "Enable Location" box.
7. Select the number of days before an appointment you would like your clients to receive email reminders.
8. Select how close to an appointment your clients can book with you.
9. Select how far in advance you want to take appointments from clients.
10. Select the amount of time before an appointment that you would like your clients to be able to cancel with you.
11. The "Credit card information will be" field will be pre-selected to that set in Vendor Admin, you can override this setting for this particular schedule by picking a different option.
12. Click on “**Update**”

Click on “**Events**” along the top of the screen and this will take you back to the main calendar so you can view your changes.