Appointment Booking System - Admin Guide

by demo_doc

1. Overview **3**
2. Manage Booking Location **3**
2.1. Add a New Location **4**
2.2. Edit the Location **5**
2.3. Delete the Location **6**
3. Manage Appointment Booking Products **7**
3.1. Add a New Appointment Booking Products **7**
3.2. Add Non-working Rules **11**
3.3. Edit the Existing Appointment Booking Products **13**
4. Vendor Configuration **14**
5. Booking Orders **15**
6. Booking Settings **15**

1. Overview

The **Appointment Booking System** add-on allows admin to enable online appointment bookings for different business, such as, Doctors, Movie and Event Tickets, Car or Bike Renting, and so on.

The key features of the Appointment Booking System add-on are as follows:

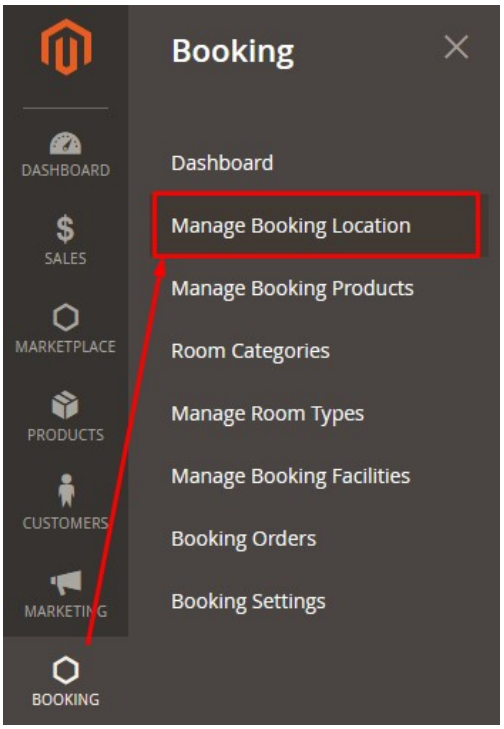
- Admin can create non-working rules.
- Admin can create the Appointment Booking type of products for definite interval of time.
- Admin can manage Appointment Booking orders.
- Admin can manage Appointment Booking Settings.
- Allows customer to book Appointment Booking type of products online.

Note

: For more information on Marketplace Booking and Reservations System, see the corresponding Admin Guide.

2. Manage Booking Location

The admin can manage the location details for creating appointment booking type of products.



Thus, the admin can perform the following tasks from the **Booking Location** page:

- Adding location(http://docs.cedcommerce.com/testing/?section=add-a-new-appointment-booking-products)

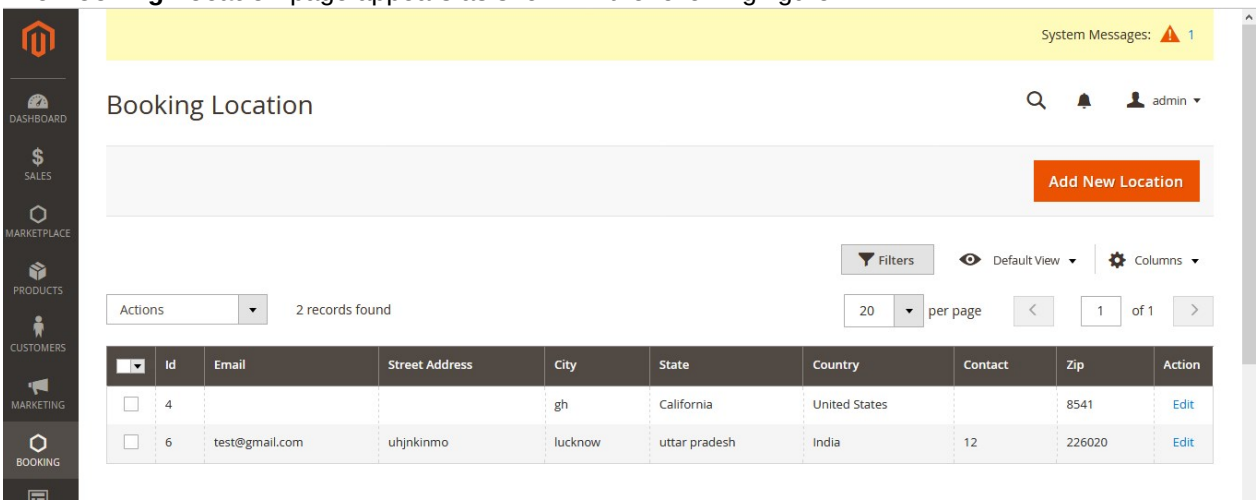
- Editing location(http://docs.cedcommerce.com/testing/?section=edit-the-location)
- Deleting location(http://docs.cedcommerce.com/testing/?section=delete-the-location)

2.1. Add a New Location

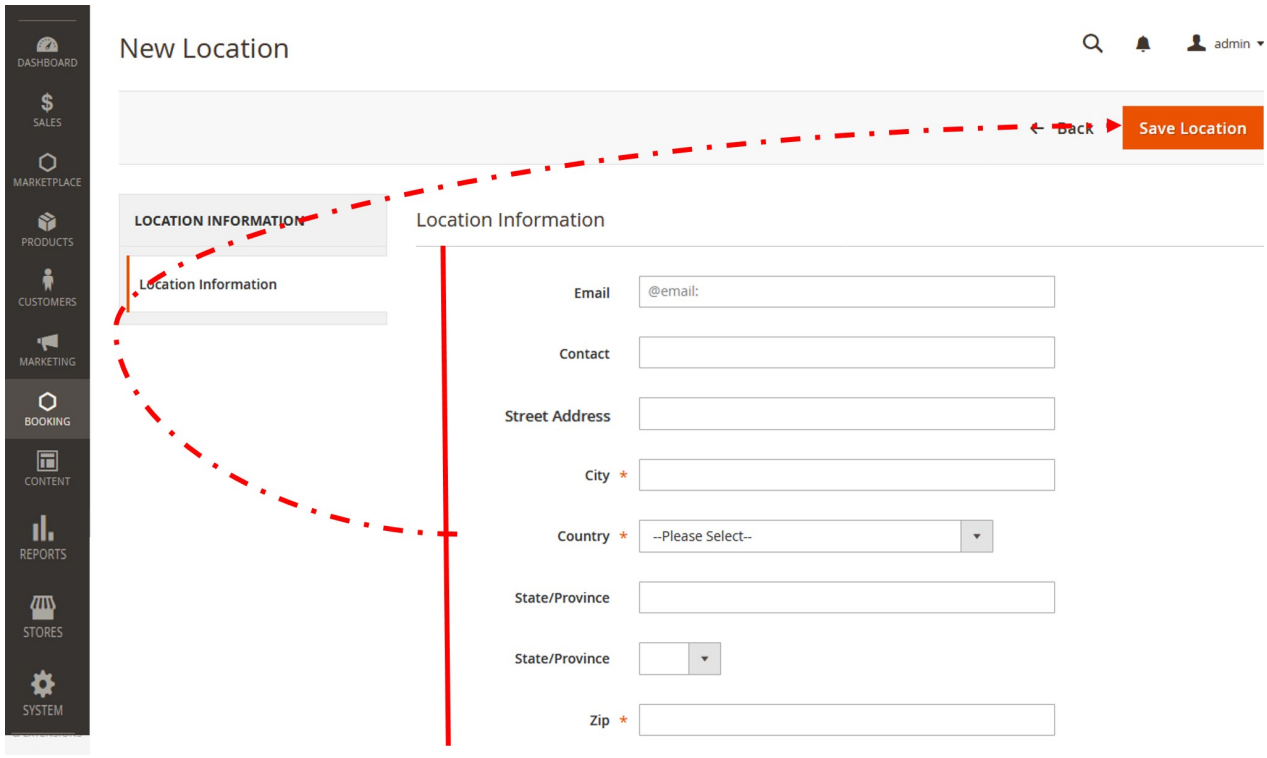
The admin can add new locations that is used while creating the appointment booking type products. The front-end user can use one of the created locations while booking the appointment booking type products.

To add new location details

1. Go to the **Admin** panel.
2. On the left navigation bar, click the **Booking** menu, and then click **Mange Booking Location**.
   The **Booking Location** page appears as shown in the following figure:



3. Click the **Add New Location** button.
   The **New Location** page appears shown in the following figure:



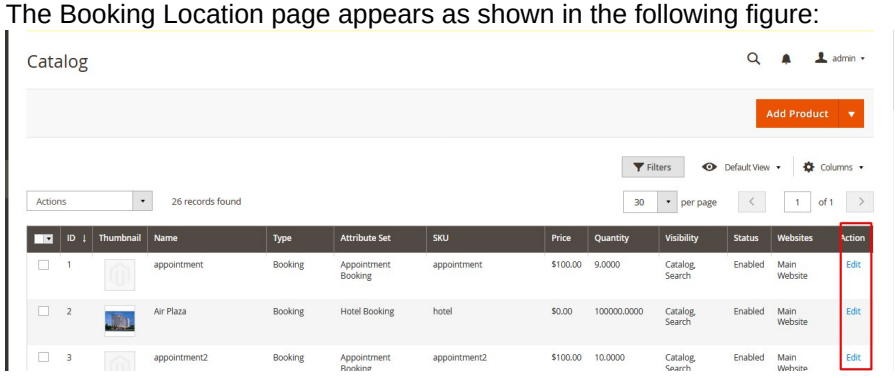
4. Enter the values in all the required fields, and then click the **Save Location**
5. The newly added location is saved and the view moves back to the **Booking Location** page, where the success message appears.
   The admin can add another required location.

2.2. Edit the Location

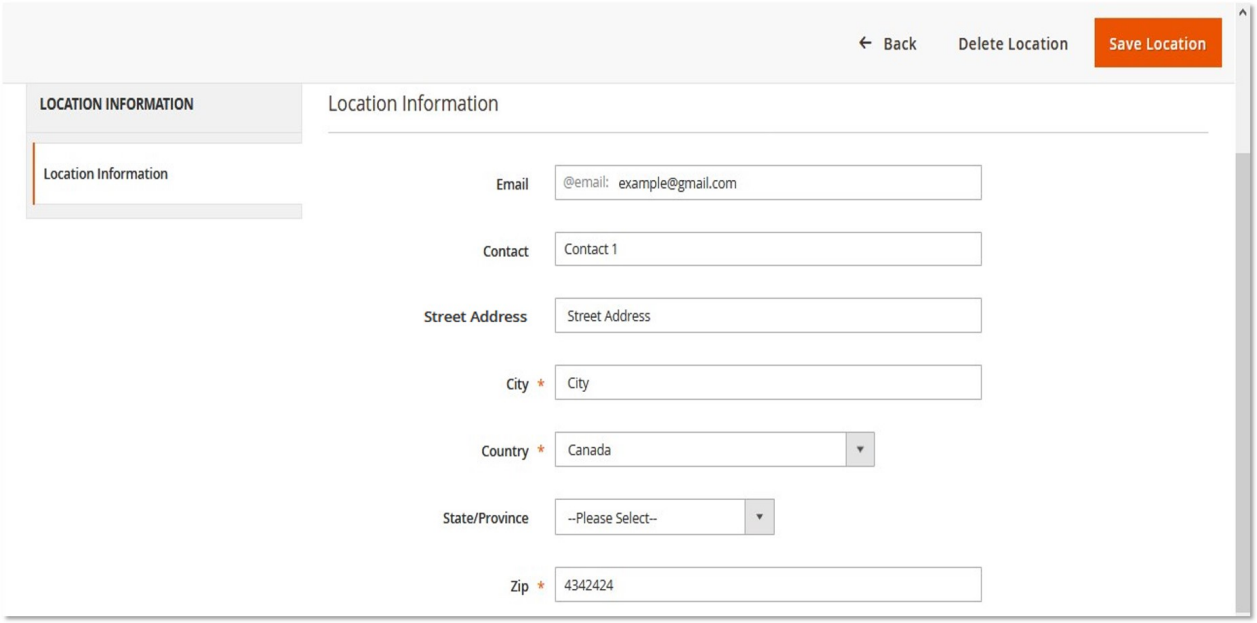
The admin can make changes in the existing locations.

To edit the existing location details

1. Go to the **Admin** panel.
2. On the left navigation bar, click the **Booking** menu, and then click **Mange Booking Location**.
   The Booking Location page appears as shown in the following figure:



3. In the **Action** column, click the **Edit** link associated with the required location that admin wants to edit.
   The page appears as shown in the following figure:



1. Make the changes as per the requirement, and then click the **Save Location**
2. The edited location is saved, and the view moves back to the **Booking Location** page, where the success message appears.

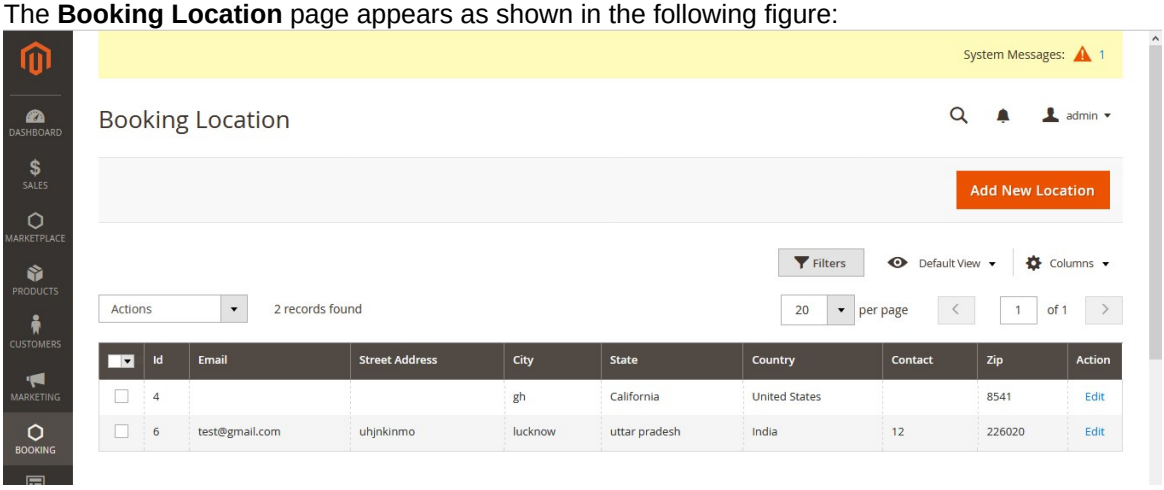
2.3. Delete the Location

The admin can make changes in the existing locations.

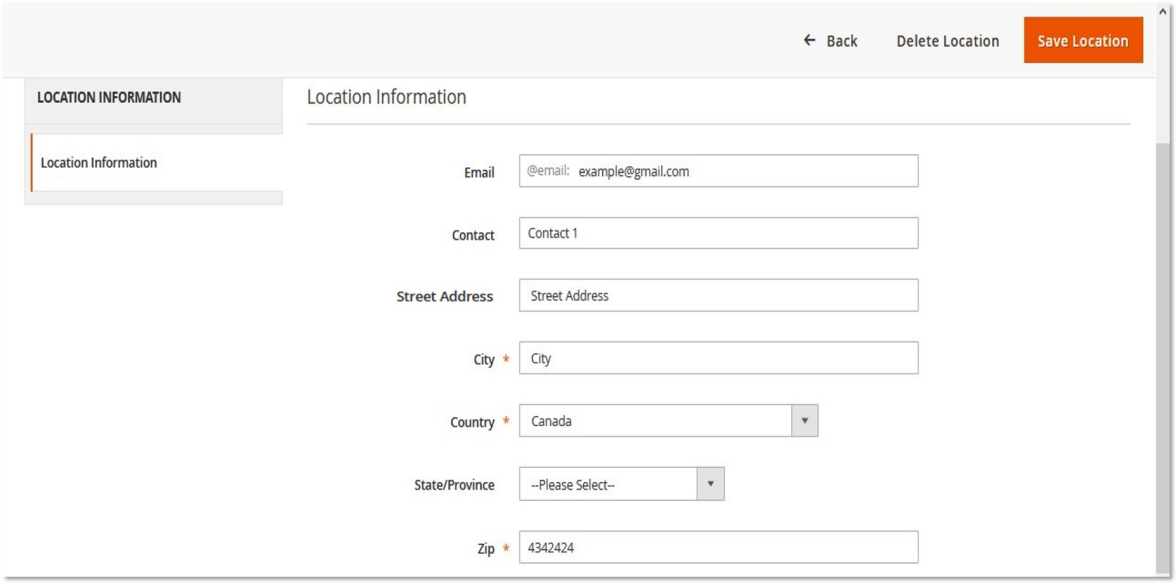
To delete the existing location details

1. Go to the **Admin** panel.

2. On the left navigation bar, click the **Booking** menu, and then click **Mange Booking Location**. The **Booking Location** page appears as shown in the following figure:



3. In the **Action** column, click the **Edit** link associated with the required location that admin wants to delete. The page appears as shown in the following figure:



4. Click the **Delete Location** button.
   A confirmation dialog box appears.
5. Click the **OK** button.
   The location is deleted, and the view moves back to the Booking Location page.

3. Manage Appointment Booking Products

The admin can perform the following tasks:

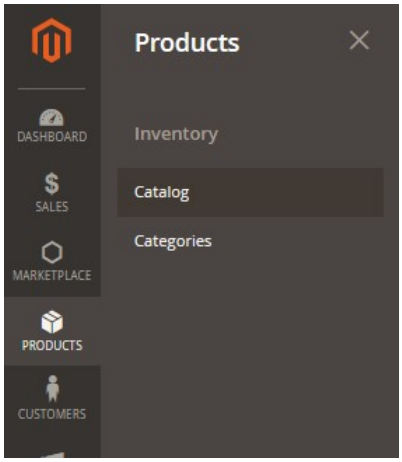
- Add a New Appointment Booking Products(http://docs.cedcommerce.com/testing/?section=add-a-new-appointment-booking-products)
- Add Non-working Rules(http://docs.cedcommerce.com/testing/?section=add-non-working-rules)
- Edit the Existing Appointment Booking Products(http://docs.cedcommerce.com/testing/?section=edit-the-existing-appointment-booking-products)

3.1. Add a New Appointment Booking Products

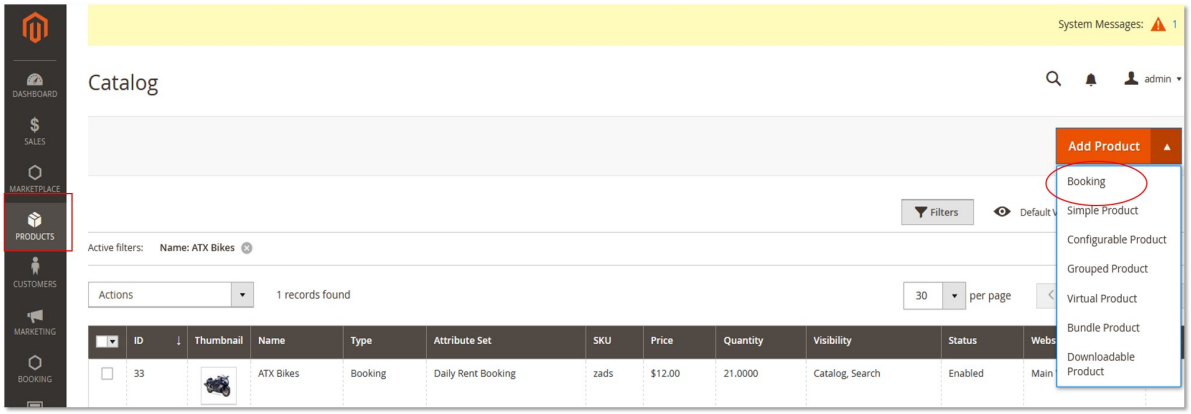
Admin can add a new **Appointment Booking** type of products along with the slots.

To add a new Appointment Booking type of products

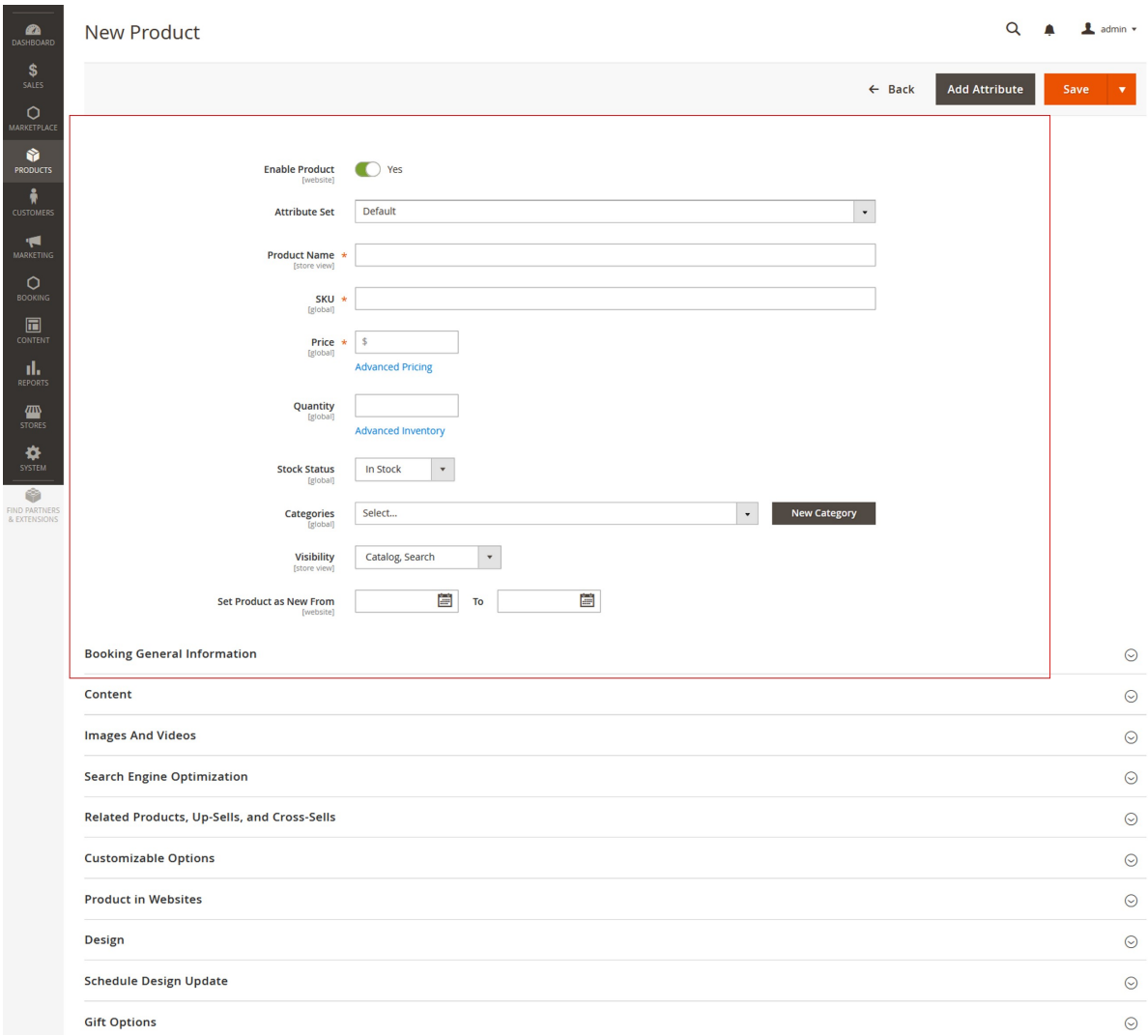
1. Go to the **Admin** panel.



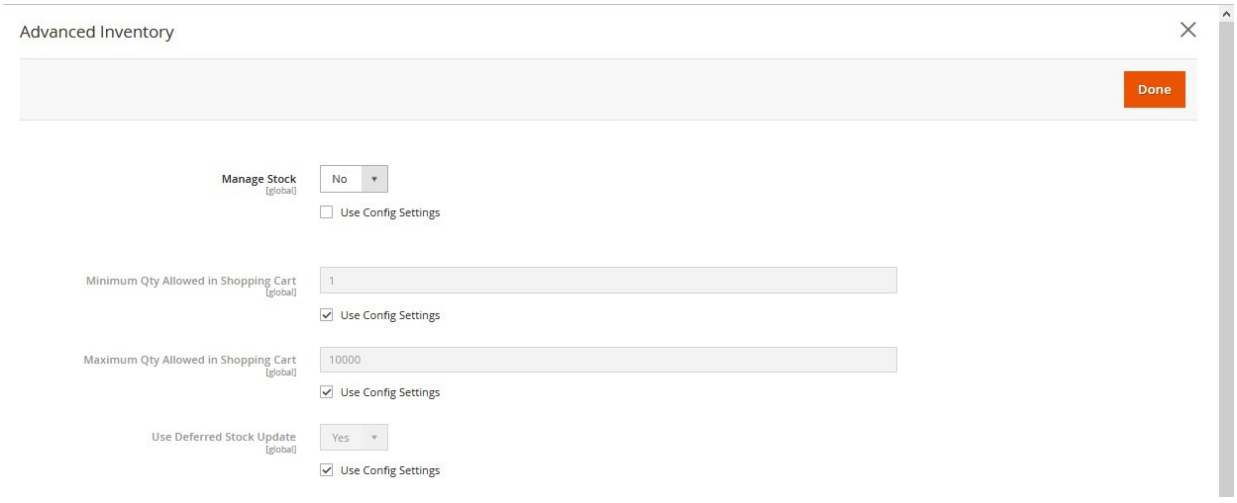
2. On the left navigation bar, click the **PRODUCTS** menu, and then click **Catalog.**
   The **Catalog** page appears as shown in the following figure:



3. Click the arrow next to the **Add Product** button, and then click **Booking**.
   The **New Product** page appears as shown in the following figure:

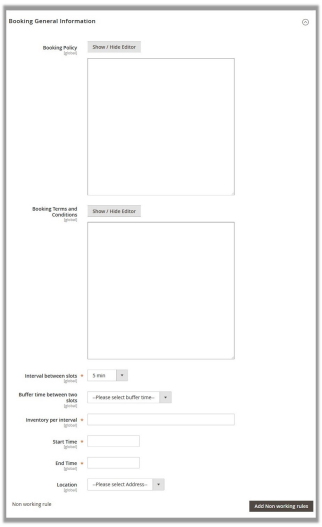


4. In the **Attribute Set** list, select **Appointment Booking**.
5. In the **Product Name** box, enter the name of the product.
6. In the **Price** box, enter a value.
7. Click the **Advanced Inventory** link.
   The **Advanced Inventory** page appears as shown in the following figure:

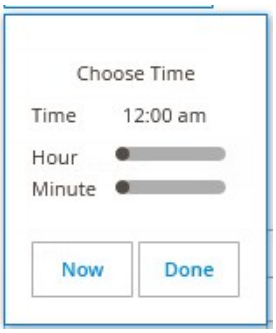


a. In the **Manage Stock** list, select **No**.
b. Click the **Done** button.
The **Advanced Inventory** page is closed and the view moves back to the **New Product** page.

8. In the **Categories** list, select the check box associated with the **Booking** option, and then click the **Done** button.
9. Enter the values in required fields of the required tabs.
10. In the right panel, click the **Booking General Information** tab.
The tab is expanded and the relevant fields appear as shown in the following figure:



11. Under **Booking General Information**, do the following steps:
    1. testing
    2. In the **Interval between slots** list, select the required option.
    Enter the time interval between the slots.
    3. Click the **Start Time** box.
    A dialog box appears.



1. Select and drag the pointer on the **Hour** and **Minute** time bar, as shown in the **Choose Time** figure.
Tip

: Click the **Now** button to enter the current time.

2. Click the **Done** button.

4. Similarly, click the **End Time** box, and enter the end time.
5. In the **Service Type** list, select the required option.
6. In the **Buffer time between two slots** list, select the buffer time.
7. In the **Address** list, select the required address.
   Note

   : The addresses added on the **New Location** page, are listed in the **Address** list. Based on the selected address, the location map appears below the **Address** list.
8. Click the **Save** button.

3.2. Add Non-working Rules

While creating or managing the appointment booking type product, the admin can create non-working rules for the product. Admin can hide the availability of product in a various way.

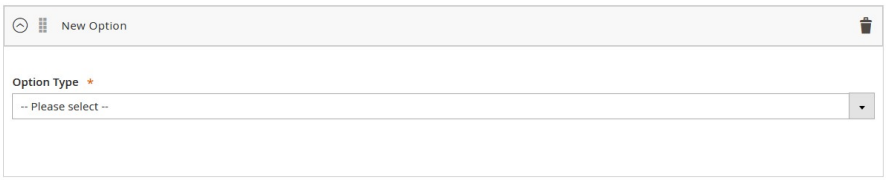
The admin can create the following two types of non-working rules:

- Date
- Days

Open the **New Product** page or the created product page to add non-working rules to the product.

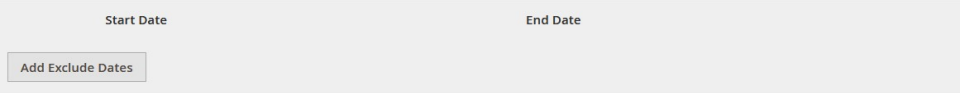
To add non-working rules

1. In the **Attribute Set** list, select **Appointment Booking**.
2. In the right panel, click the **Booking General Information** tab.
   The relevant fields appear.
3. Under **Non-working rule**, click the **Add Non-working rule** button**.**
   The **New Option** tab appears as shown in the following figure:



1. Under **New Option**, in the **Option Type** list, do one of the following **step i)** or **step ii)**:
   1. Select **Date**.
      Note

      : If the **Date** option is selected, then the **Start Date** and the **End Date** fields appear as shown in the following figure . Follow the steps from **(1)**(#AddExcludeDates) to **(5)**(#Enddate)
      .



1. Click the **Add Exclude Dates** button.
   The Dates boxes appear as shown in the following figure:

2. In the **Start Date** box, click the **Calendar**

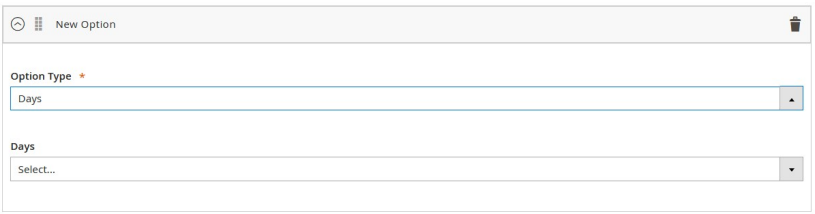
   icon.
3. Select the required date from the **Calendar**.
   Note

   : Enter the date from when the non-working period has to begin.
4. Similarly, in the **End Date** box, click the **Calendar.**
5. Select the required date from the **Calendar**.
   Note

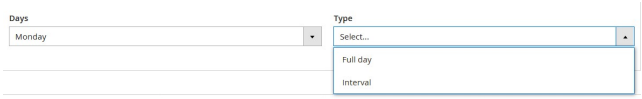
   : Enter the date, when the non-working period has to end.

2. Select **Days**.
   Note

   : If the **Days** option is selected, then the **Days** fields appears as shown in the following figure. Follow the steps **(1)** and **(2)**.



1. In the **Days** list, select the required day.
   The **Type** field appears as shown in the following figure:



2. In the **Type** list, select **Full day** or **Interval**.
   Note

   : If the **Interval** option is selected, then the **Start Date** and the **End Date** fields appear as shown in the following figure. Follow the steps from **(1)** (#AddExcludeDates)
   to **(5)**(#Enddate)
   .

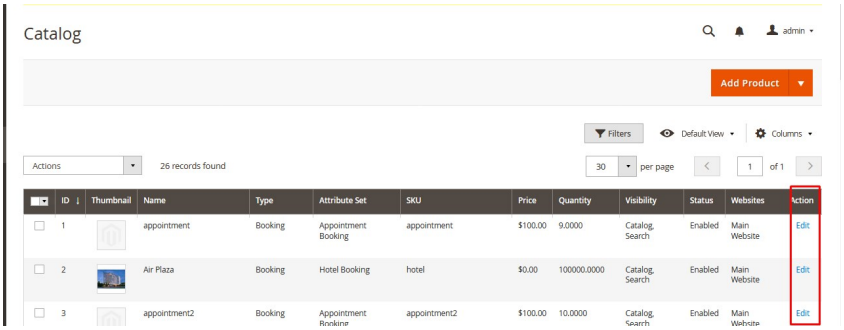
4. Click the **Save** button.

3.3. Edit the Existing Appointment Booking Products

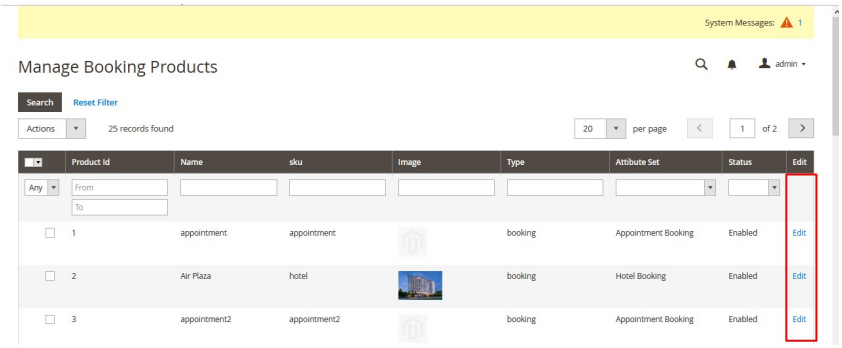
The admin can edit the products from the product **Catalog** page, and also from the **Manage Booking Products** page.

To edit the existing Appointment Booking Products

1. Go to the **Admin** panel.
2. On the left navigation bar, click the **PRODUCTS** menu, and then click **Catalog**.
   The **Catalog** page appears as shown in the following figure:



   ORON the left navigation bar, click the **BOOKING** menu, and then click **Manage Booking Products**.
   The **Manage Booking Products** page appears as shown in the following figure:



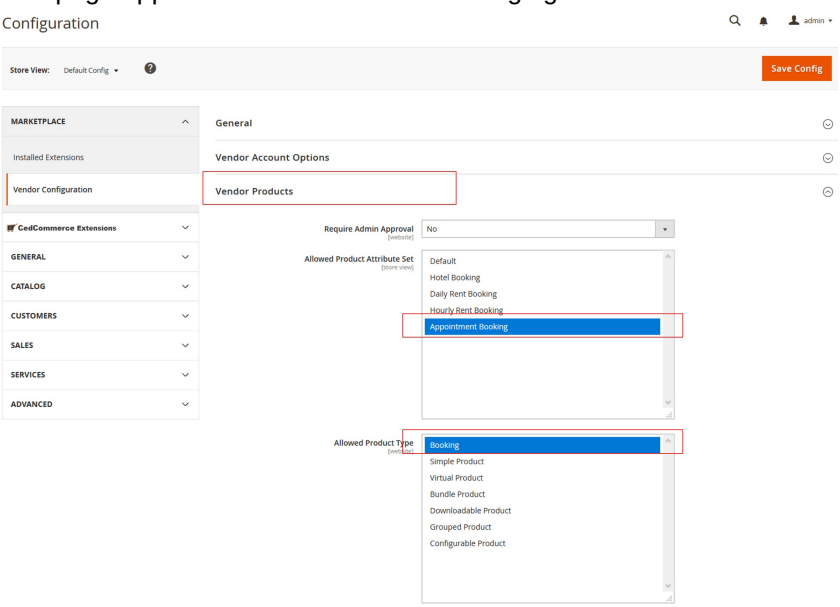
3. Click the **Edit** link associated with the required product that admin wants to edit.
4. Make the changes as per the requirement.
5. Click the **Save** button.
   The changes are saved and the success message appears.

4. Vendor Configuration

The Admin has rights to enable or disable features for vendors to allow or disallow the vendors to create the appointment booking type of products.

To enable vendors to create Appointment Booking type of products

1. Go to the **Admin** panel.
2. On the left navigation bar, click the **MARKETPLACE** menu, and then click **Vendor Configuration**.
   The page appears as shown in the following figure:



3. In the right panel, click the **Vendor Products** tab.
4. Under **Vendor Products**, do the following:
   a. In the **Allowed Product Attribute Set** list, select **Appointment Booking**.
   b. In **Allowed Product Type**, select **Booking**.
5. Click the **Save Config** button.
   The defined vendor configuration is saved.

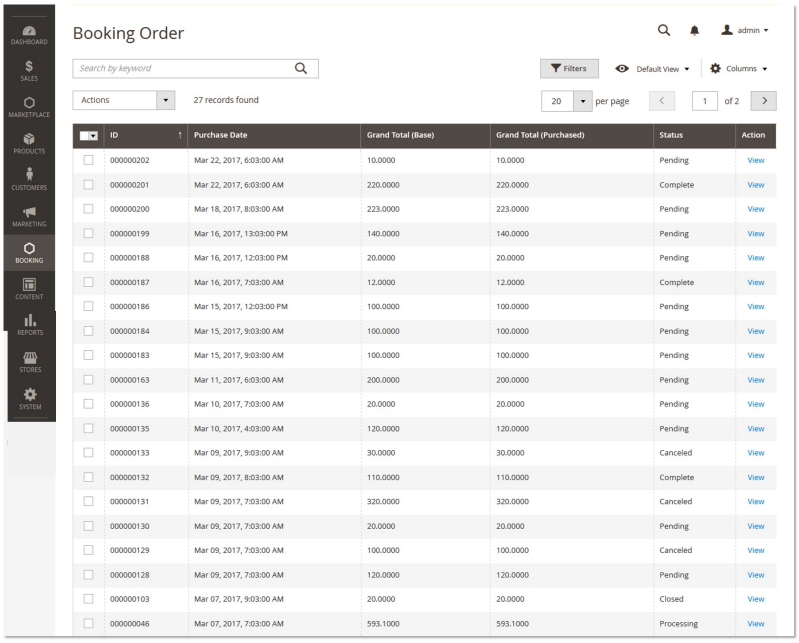
5. Booking Orders

The admin has an ability to view the existing booking orders.

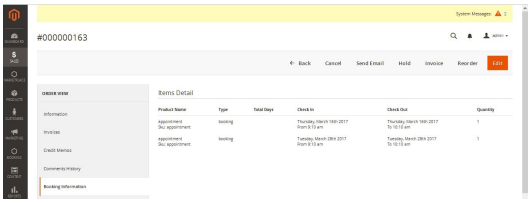
To view the booking orders

1. Go to the **Admin** panel.

2. On the left navigation bar, click the **BOOKING** menu, and then click **Booking Orders**.
   The **Booking Order** page appears as shown in the following figure:



3. In the **Action** column, click the **View** link associated with the booking order that the admin wants to view.
   The page appears as shown in the following figure:

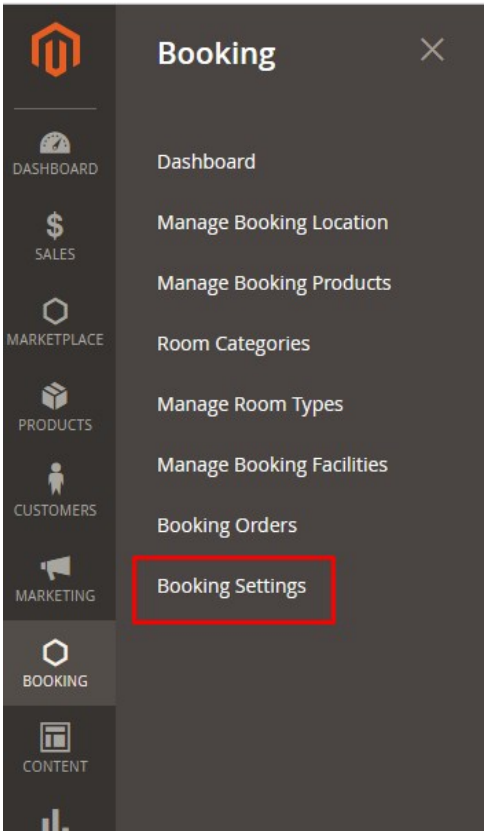


6. Booking Settings

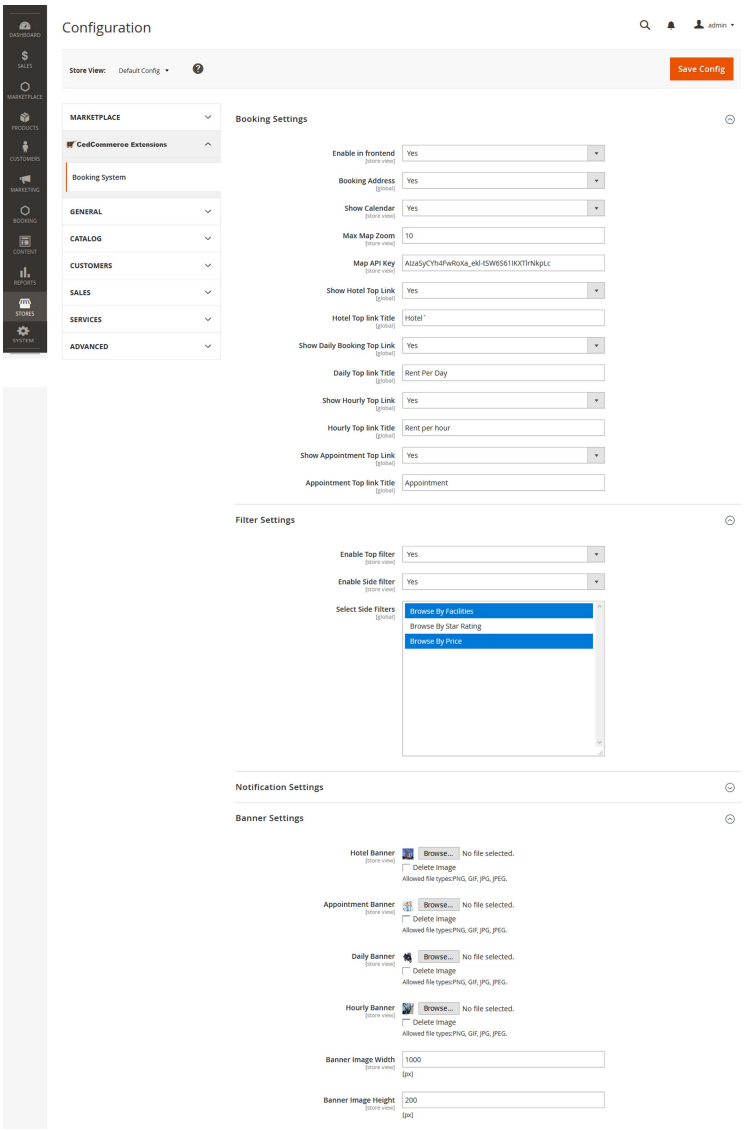
The admin has rights to enable or disable the features of the add-on to the front-end users.

To define the booking settings

1. Go to the **Admin** panel.



2. On the left navigation bar, click the **BOOKING** menu, and then click **Booking Settings**.
   The **Configuration** page appears.
3. On the left navigation panel, click the **CedCommerce Extensions** menu, and then click Booking **System**.
   The page appears as shown in the following figure:



4. In the right panel, click the **Booking Settings** tab to expand the associated fields.
5. Under the **Booking Settings** tab, do the following steps:
    a. Enter the corresponding values in the required fields.
    b. In the **Show Appointment Top Link** list, select **Yes**, to enable the appointment top link at the front-end.
    c. In the **Appointment Top link Title** box, enter the title for the **Appointment Top link.**
6. In the right panel, click the **Filter Settings** tab to expand the associated fields.
7. Under the **Filter Settings** tab, do the following steps:
    a. In the **Enable** filter list, select **Yes**, to enable filter at the customer front-end.
    b. In the **Product Attribute** box, select required attribute.
8. In the right panel, click the **Notification Settings** tab to expand the associated fields.
9. Under the **Notification Settings** tab, enter the required values in the corresponding fields.
10. In the right panel, click the **Banner Settings** tab to expand the associated fields and enter the required values.
11. Under the **Banner Settings** tab, browse the **Appointment Banner** image.
12. Click the **Save Config** button.
    The defined configuration is saved.