

# Appointment Booking System - Admin Guide

by demo\_doc

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## 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.

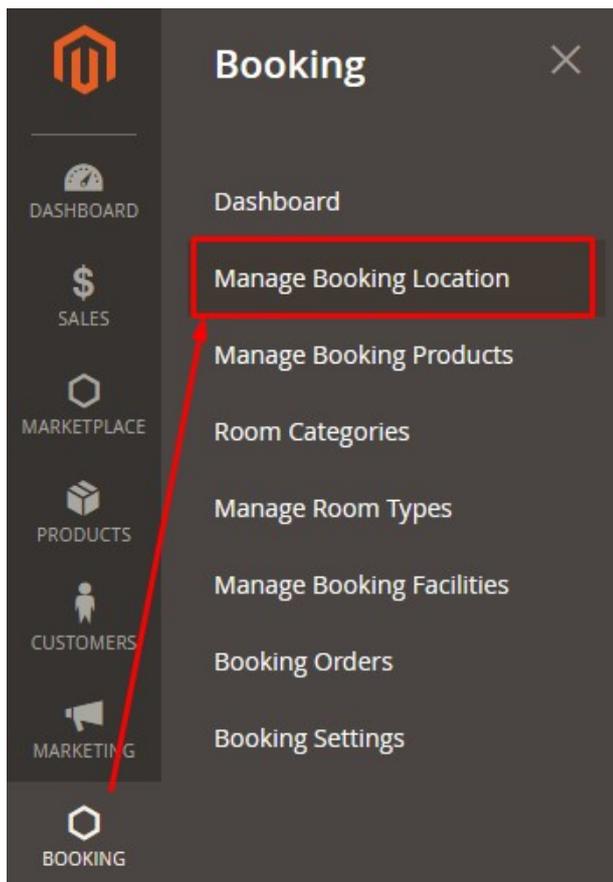
*The key features of the Appointment Booking System add-on are as follows:*

- 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.

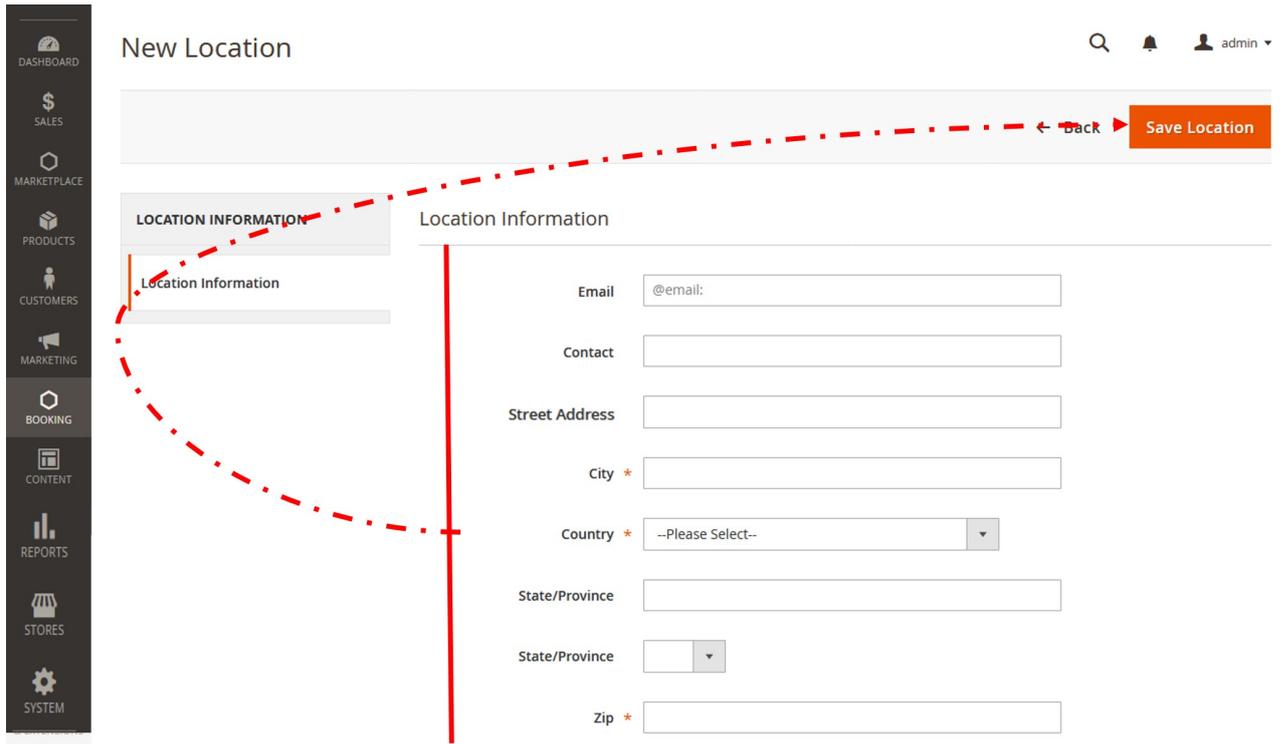
### To add new location details

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:

The screenshot shows the 'Booking Location' admin page. On the left is a dark sidebar with navigation icons for Dashboard, Sales, Marketplace, Products, Customers, Marketing, and Booking. The main content area has a yellow header with 'System Messages: 1' and a search bar. Below the header is a large white box with an 'Add New Location' button. Underneath is a table with 2 records. The table has columns: Id, Email, Street Address, City, State, Country, Contact, Zip, and Action. The first record has Id 4, City 'gh', State 'California', and Country 'United States'. The second record has Id 6, Email 'test@gmail.com', Street Address 'uhjnkimo', City 'lucknow', State 'uttar pradesh', Country 'India', and Contact '12'. There are also filters, a 'Default View' dropdown, and a 'Columns' dropdown. The table shows '2 records found' and '20 per page'.

Id	Email	Street Address	City	State	Country	Contact	Zip	Action
4			gh	California	United States		8541	Edit
6	test@gmail.com	uhjnkimo	lucknow	uttar pradesh	India	12	226020	Edit

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



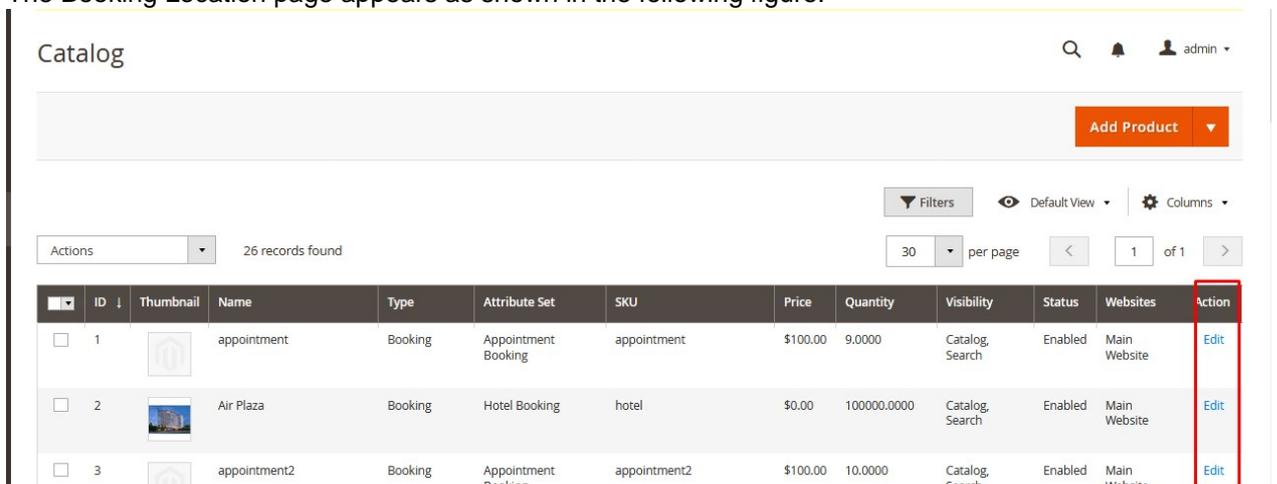
4. Enter the values in all the required fields, and then click the **Save Location**
5. The newly added location is saved and the view moves back to the **Booking Location** page, where the success message appears.  
The admin can add another required location.

## 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:



- 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:

The screenshot shows a modal window for editing location information. At the top right, there are three buttons: 'Back', 'Delete Location', and 'Save Location'. The main content area is titled 'Location Information' and contains the following fields:

- Email:** @email: example@gmail.com
- Contact:** Contact 1
- Street Address:** Street Address
- City \*:** City
- Country \*:** Canada
- State/Province:** --Please Select--
- Zip \*:** 4342424

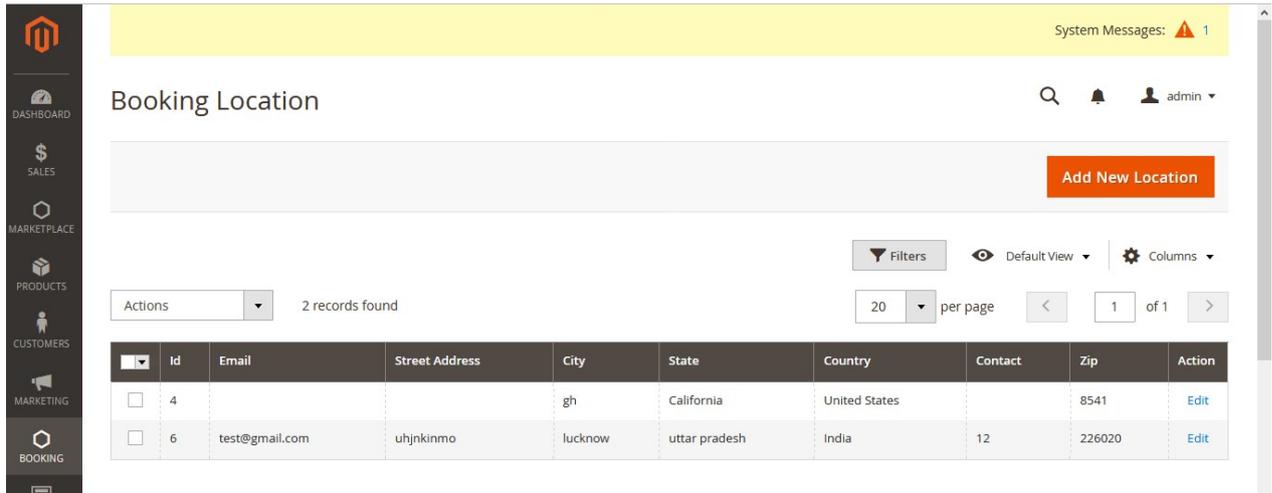
- Make the changes as per the requirement, and then click the **Save Location**
- The edited location is saved, and the view moves back to the **Booking Location** page, where the success message appears.

## 2.3. Delete the Location

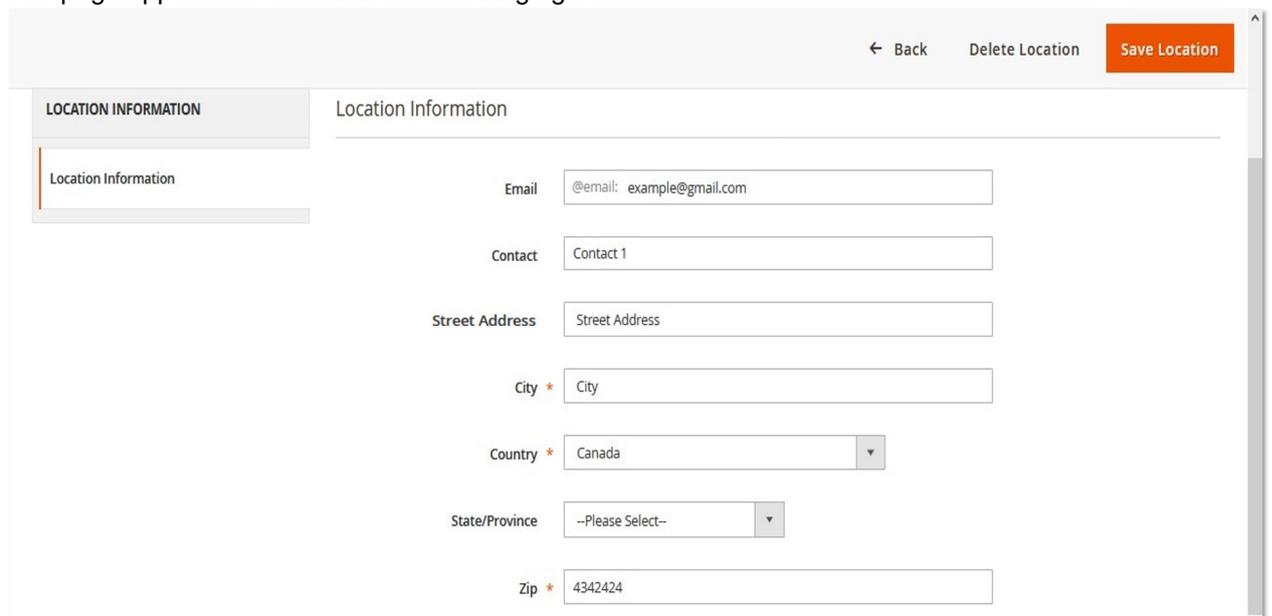
The admin can make changes in the existing locations.

### *To delete the existing location details*

- Go to the **Admin** panel.
- 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:

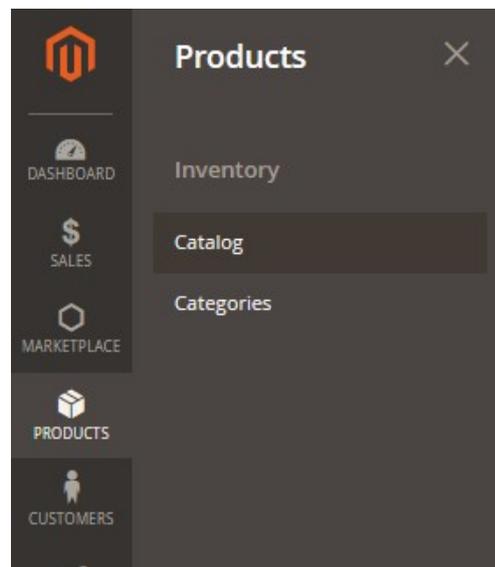
- Add a New Appointment Booking Products(<http://docs.cedcommerce.com/testing/?section=add-a-new-appointment-booking-products>)
- Add Non-working Rules(<http://docs.cedcommerce.com/testing/?section=add-non-working-rules>)
- Edit the Existing Appointment Booking Products(<http://docs.cedcommerce.com/testing/?section=edit-the-existing-appointment-booking-products>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

### 3.1. Add a New Appointment Booking Products

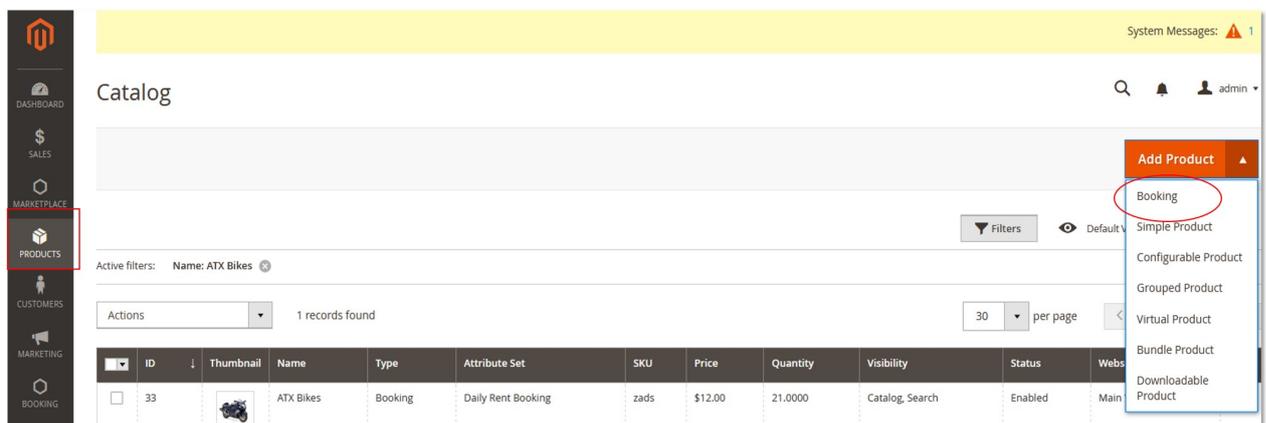
Admin can add a new **Appointment Booking** type of products along with the slots.

#### *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:



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

The screenshot displays the 'New Product' page in the Appointment Booking System admin interface. The page is titled 'New Product' and features a sidebar on the left with navigation icons for Dashboard, Sales, Marketplace, Products, Customers, Marketing, Booking, Content, Reports, Stores, and System. The main content area includes a 'Back' button, 'Add Attribute' button, and 'Save' button. The form contains the following fields and options:

- Enable Product** (website): A toggle switch set to 'Yes'.
- Attribute Set**: A dropdown menu set to 'Default'.
- Product Name** (store view): A text input field.
- SKU** (global): A text input field.
- Price** (global): A text input field with a '\$' symbol, and a link for [Advanced Pricing](#).
- Quantity** (global): A text input field, with a link for [Advanced Inventory](#).
- Stock Status** (global): A dropdown menu set to 'In Stock'.
- Categories** (global): A dropdown menu set to 'Select...', with a **New Category** button.
- Visibility** (store view): A dropdown menu set to 'Catalog, Search'.
- Set Product as New From** (website): A text input field with a calendar icon, followed by 'To' and another text input field with a calendar icon.

Below the main form, there is a list of expandable sections:

- Booking General Information
- Content
- Images And Videos
- Search Engine Optimization
- Related Products, Up-Sells, and Cross-Sells
- Customizable Options
- Product in Websites
- Design
- Schedule Design Update
- Gift Options

- In the **Attribute Set** list, select **Appointment Booking**.
- In the **Product Name** box, enter the name of the product.
- In the **Price** box, enter a value.
- Click the **Advanced Inventory** link.

The **Advanced Inventory** page appears as shown in the following figure:

Advanced Inventory

Done

Manage Stock [global] No  Use Config Settings

Minimum Qty Allowed in Shopping Cart [global] 1  Use Config Settings

Maximum Qty Allowed in Shopping Cart [global] 10000  Use Config Settings

Use Deferred Stock Update [global] Yes  Use Config Settings

- 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:

### Booking General Information



**Booking Policy**  
[global]

Show / Hide Editor

**Booking Terms and Conditions**  
[global]

Show / Hide Editor

**Interval between slots** \* [global]  ▼

**Buffer time between two slots** \* [global]  ▼

**Inventory per interval** \* [global]

**Start Time** \* [global]

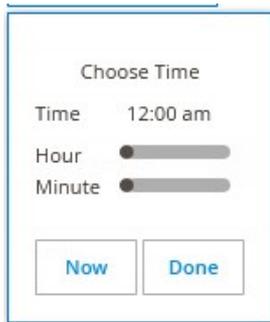
**End Time** \* [global]

**Location** \* [global]  ▼

Non working rule

Add Non working rules

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



- i. 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.
- ii. 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:

- a. Under **New Option**, in the **Option Type** list, do one of the following **step i)** or **step ii)**:
  - i. 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)

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

- ii. In the **Start Date** box, click the **Calendar**



icon.

- iii. Select the required date from the **Calendar**.

**Note** : Enter the date from when the non-working period has to begin.

iv. Similarly, in the **End Date** box, click the **Calendar**.

v. Select the required date from the **Calendar**.

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

b. 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).

The screenshot shows a form titled "New Option". The "Option Type" dropdown is set to "Days". Below it, there is a "Days" dropdown menu with "Select..." as the current selection.

i. In the **Days** list, select the required day.

The **Type** field appears as shown in the following figure:

The screenshot shows two dropdown menus. The "Days" dropdown is set to "Monday". The "Type" dropdown is open, showing "Full day" and "Interval" as options.

ii. 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)

The screenshot shows two input fields labeled "Start Date" and "End Date". Below them is a button labeled "Add Exclude Dates".

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:

Catalog

Search, Notifications, admin

Add Product

Filters, Default View, Columns

Actions 26 records found 30 per page 1 of 1

ID	Thumbnail	Name	Type	Attribute Set	SKU	Price	Quantity	Visibility	Status	Websites	Action
1		appointment	Booking	Appointment Booking	appointment	\$100.00	9,0000	Catalog, Search	Enabled	Main Website	Edit
2		Air Plaza	Booking	Hotel Booking	hotel	\$0.00	100000.0000	Catalog, Search	Enabled	Main Website	Edit
3		appointment2	Booking	Appointment Booking	appointment2	\$100.00	10,0000	Catalog, Search	Enabled	Main Website	Edit

OR On 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:

System Messages: 1

Manage Booking Products

Search, Reset Filter

Actions 25 records found 20 per page 1 of 2

Product id	Name	sku	Image	Type	Attribute Set	Status	Edit
1	appointment	appointment		booking	Appointment Booking	Enabled	Edit
2	Air Plaza	hotel		booking	Hotel Booking	Enabled	Edit
3	appointment2	appointment2		booking	Appointment Booking	Enabled	Edit

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:

## Configuration



 admin

Store View: Default Config 

**Save Config**

**MARKETPLACE** 

Installed Extensions

Vendor Configuration **Vendor Products** 

**CedCommerce Extensions** 

**GENERAL** 

**CATALOG** 

**CUSTOMERS** 

**SALES** 

**SERVICES** 

**ADVANCED** 

**General** 

**Vendor Account Options** 

**Vendor Products** 

Require Admin Approval [website] No 

Allowed Product Attribute Set [store view]

- Default
- Hotel Booking
- Daily Rent Booking
- Hourly Rent Booking
- Appointment Booking**

Allowed Product Type [website]

- Booking**
- Simple Product
- Virtual Product
- Bundle Product
- Downloadable Product
- Grouped Product
- Configurable Product

- In the right panel, click the **Vendor Products** tab.
- Under **Vendor Products**, do the following:
  - In the **Allowed Product Attribute Set** list, select **Appointment Booking**.
  - In **Allowed Product Type**, select **Booking**.
- 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

- Go to the **Admin** panel.
- 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:

**Booking Order** 🔍 🔔 👤 admin ▾

Search by keyword  🔍

Actions ▾ 27 records found 🔽 Filters 👁 Default View ⌵ ⚙ Columns ▾

20 ▾ per page ⏪ 1 of 2 ⏩

<input type="checkbox"/>	ID	Purchase Date	Grand Total (Base)	Grand Total (Purchased)	Status	Action
<input type="checkbox"/>	000000202	Mar 22, 2017, 6:03:00 AM	10.0000	10.0000	Pending	<a href="#">View</a>
<input type="checkbox"/>	000000201	Mar 22, 2017, 6:03:00 AM	220.0000	220.0000	Complete	<a href="#">View</a>
<input type="checkbox"/>	000000200	Mar 18, 2017, 8:03:00 AM	223.0000	223.0000	Pending	<a href="#">View</a>
<input type="checkbox"/>	000000199	Mar 16, 2017, 13:03:00 PM	140.0000	140.0000	Pending	<a href="#">View</a>
<input type="checkbox"/>	000000188	Mar 16, 2017, 12:03:00 PM	20.0000	20.0000	Pending	<a href="#">View</a>
<input type="checkbox"/>	000000187	Mar 16, 2017, 7:03:00 AM	12.0000	12.0000	Complete	<a href="#">View</a>
<input type="checkbox"/>	000000186	Mar 15, 2017, 12:03:00 PM	100.0000	100.0000	Pending	<a href="#">View</a>
<input type="checkbox"/>	000000184	Mar 15, 2017, 9:03:00 AM	100.0000	100.0000	Pending	<a href="#">View</a>
<input type="checkbox"/>	000000183	Mar 15, 2017, 9:03:00 AM	100.0000	100.0000	Pending	<a href="#">View</a>
<input type="checkbox"/>	000000163	Mar 11, 2017, 6:03:00 AM	200.0000	200.0000	Pending	<a href="#">View</a>
<input type="checkbox"/>	000000136	Mar 10, 2017, 7:03:00 AM	20.0000	20.0000	Pending	<a href="#">View</a>
<input type="checkbox"/>	000000135	Mar 10, 2017, 4:03:00 AM	120.0000	120.0000	Pending	<a href="#">View</a>
<input type="checkbox"/>	000000133	Mar 09, 2017, 9:03:00 AM	30.0000	30.0000	Canceled	<a href="#">View</a>
<input type="checkbox"/>	000000132	Mar 09, 2017, 8:03:00 AM	110.0000	110.0000	Complete	<a href="#">View</a>
<input type="checkbox"/>	000000131	Mar 09, 2017, 7:03:00 AM	320.0000	320.0000	Canceled	<a href="#">View</a>
<input type="checkbox"/>	000000130	Mar 09, 2017, 7:03:00 AM	20.0000	20.0000	Pending	<a href="#">View</a>
<input type="checkbox"/>	000000129	Mar 09, 2017, 7:03:00 AM	100.0000	100.0000	Canceled	<a href="#">View</a>
<input type="checkbox"/>	000000128	Mar 09, 2017, 7:03:00 AM	120.0000	120.0000	Pending	<a href="#">View</a>
<input type="checkbox"/>	000000103	Mar 07, 2017, 9:03:00 AM	20.0000	20.0000	Closed	<a href="#">View</a>
<input type="checkbox"/>	000000046	Mar 07, 2017, 7:03:00 AM	593.1000	593.1000	Processing	<a href="#">View</a>

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:

#000000163 🔍 🔔 👤 admin ▾

← Back Cancel Send Email Hold Invoice Reorder **Edit**

**ORDER VIEW**

- Information
- Invoices
- Credit Memos
- Comments History
- Booking Information

**Items Detail**

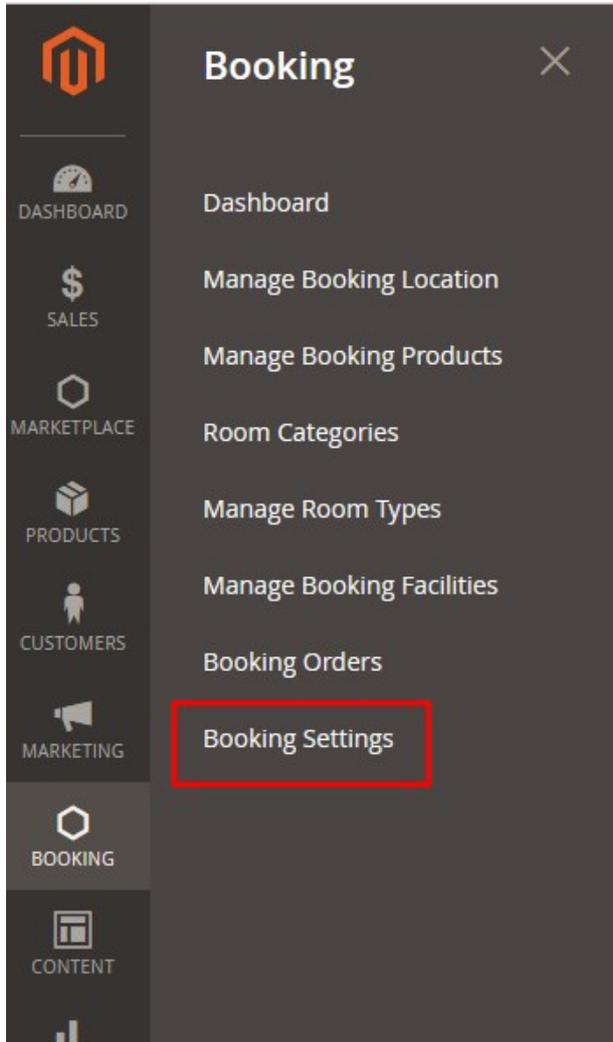
Product Name	Type	Total Days	Check In	Check Out	Quantity
appointment SKU: appointment	booking		Thursday, March 16th 2017 From 9:10 am	Thursday, March 16th 2017 To 10:10 am	1
appointment SKU: appointment	booking		Tuesday, March 28th 2017 From 9:10 am	Tuesday, March 28th 2017 To 10:10 am	1

## 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:

- DASHBOARD
- SALES
- MARKETPLACE
- PRODUCTS
- CUSTOMERS
- MARKETING
- BOOKING
- CONTENT
- REPORTS
- STORES
- SYSTEM

## Configuration

Search, Notifications, Admin Profile

Store View: Default Config ? Save Config

- MARKETPLACE
- CedCommerce Extensions
- Booking System
- GENERAL
- CATALOG
- CUSTOMERS
- SALES
- SERVICES
- ADVANCED

### Booking Settings

Enable in frontend

Booking Address

Show Calendar

Max Map Zoom

Map API Key

Show Hotel Top Link

Hotel Top link Title

Show Daily Booking Top Link

Daily Top link Title

Show Hourly Top Link

Hourly Top link Title

Show Appointment Top Link

Appointment Top link Title

### Filter Settings

Enable Top filter

Enable Side filter

Select Side Filters

- Browse By Facilities
- Browse By Star Rating
- Browse By Price

### Notification Settings

### Banner Settings

Hotel Banner  No file selected.  
 Delete Image  
 Allowed file types:PNG, GIF, JPG, JPEG.

Appointment Banner  No file selected.  
 Delete Image  
 Allowed file types:PNG, GIF, JPG, JPEG.

Daily Banner  No file selected.  
 Delete Image  
 Allowed file types:PNG, GIF, JPG, JPEG.

Hourly Banner  No file selected.  
 Delete Image  
 Allowed file types:PNG, GIF, JPG, JPEG.

Banner Image Width  [px]

Banner Image Height  [px]

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.