

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 8
 - 3.2. Add Non-working Rules 12
 - 3.3. Edit the Existing Appointment Booking Products 14
- 4. Vendor Configuration 15**
- 5. Booking Orders 16**
- 6. Booking Settings 17**

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.

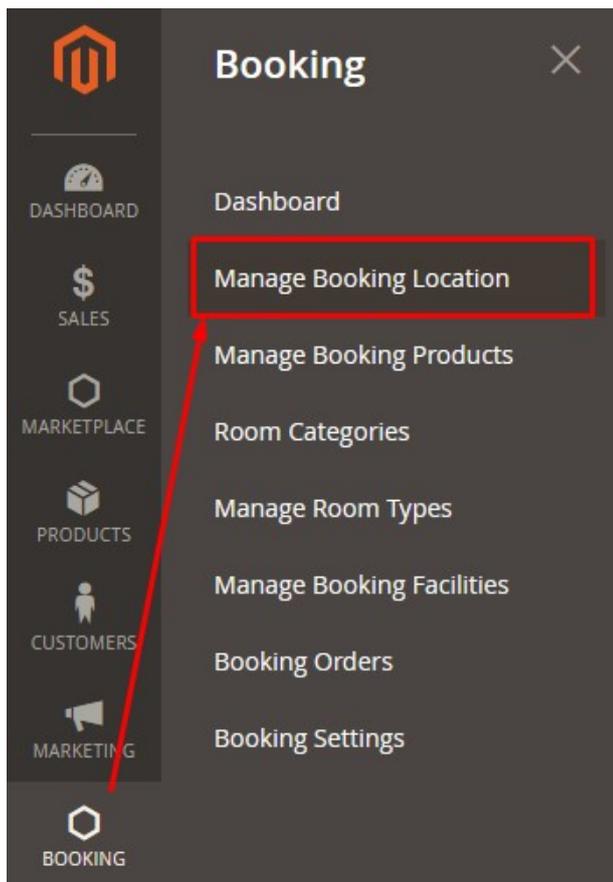
The key features of the Appointment Booking System add-on are as follows:

- 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.

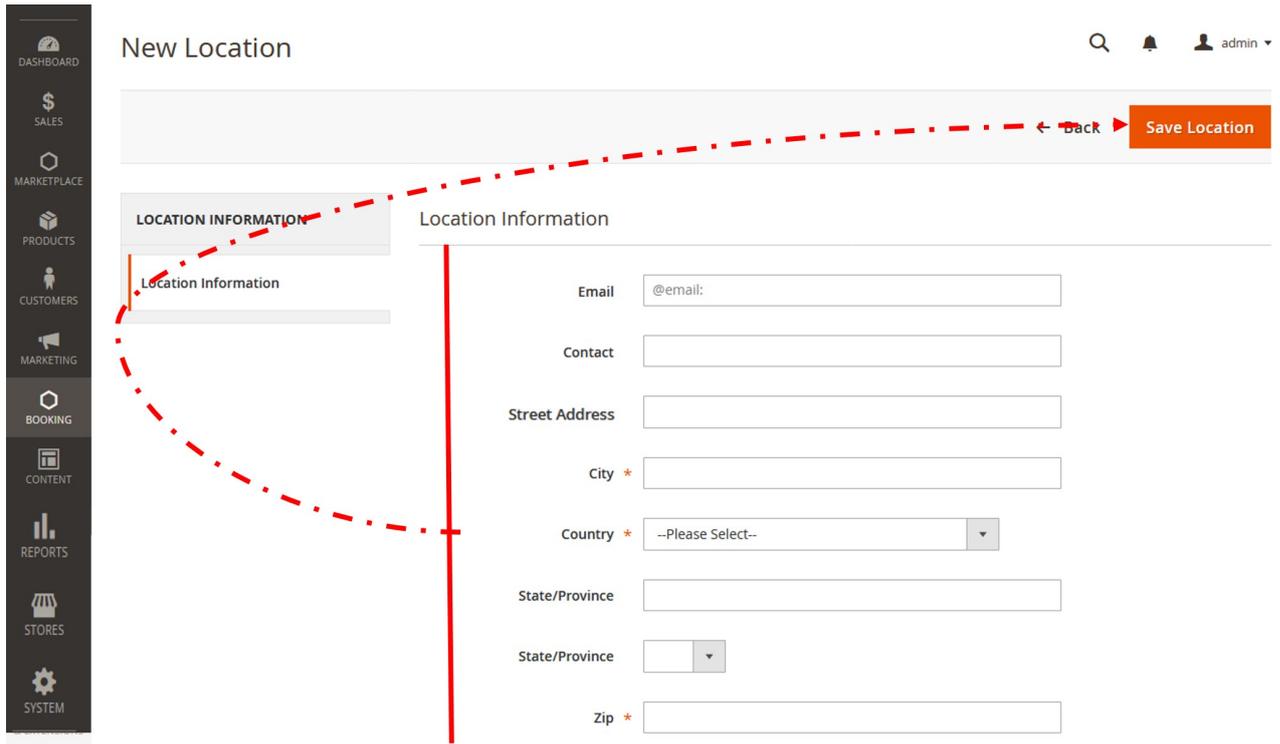
To add new location details

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 interface. 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 pagination controls showing '20 per page' and '1 of 1'.

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:



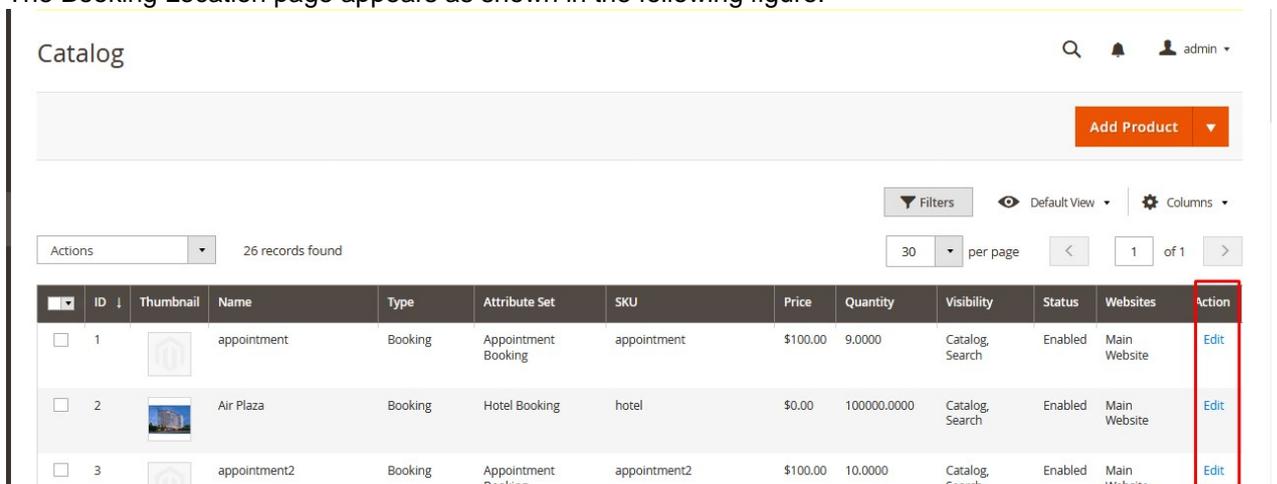
4. Enter the values in all the required fields, and then click the **Save Location**
5. The newly added location is saved and the view moves back to the **Booking Location** page, where the success message appears.
The admin can add another required location.

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: a back arrow, '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 (dropdown menu)
- State/Province:** --Please Select-- (dropdown menu)
- Zip *:** 4342424

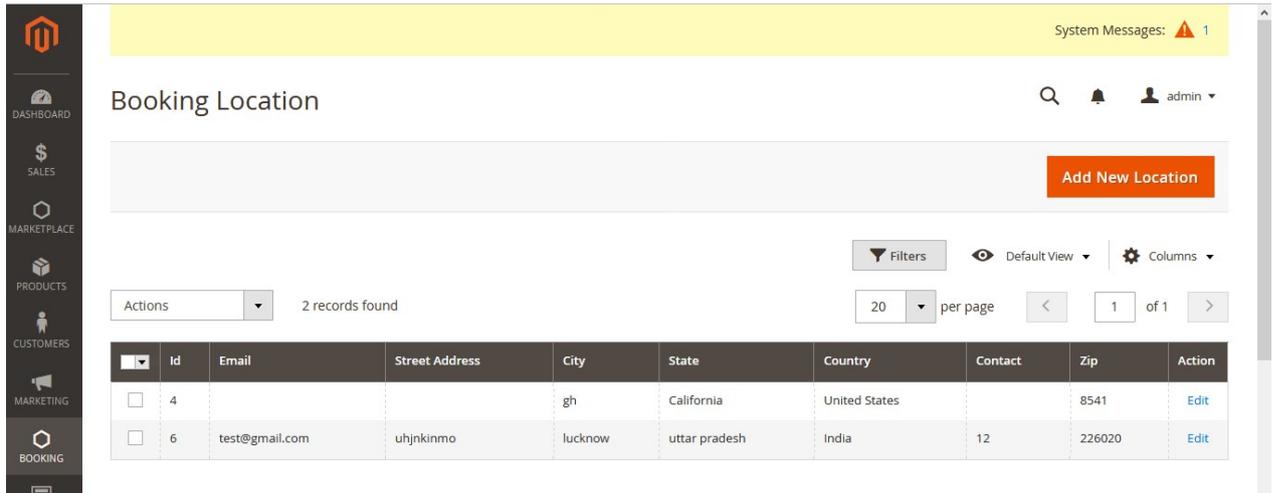
- Make the changes as per the requirement, and then click the **Save Location**
- The edited location is saved, and the view moves back to the **Booking Location** page, where the success message appears.

2.3. Delete the Location

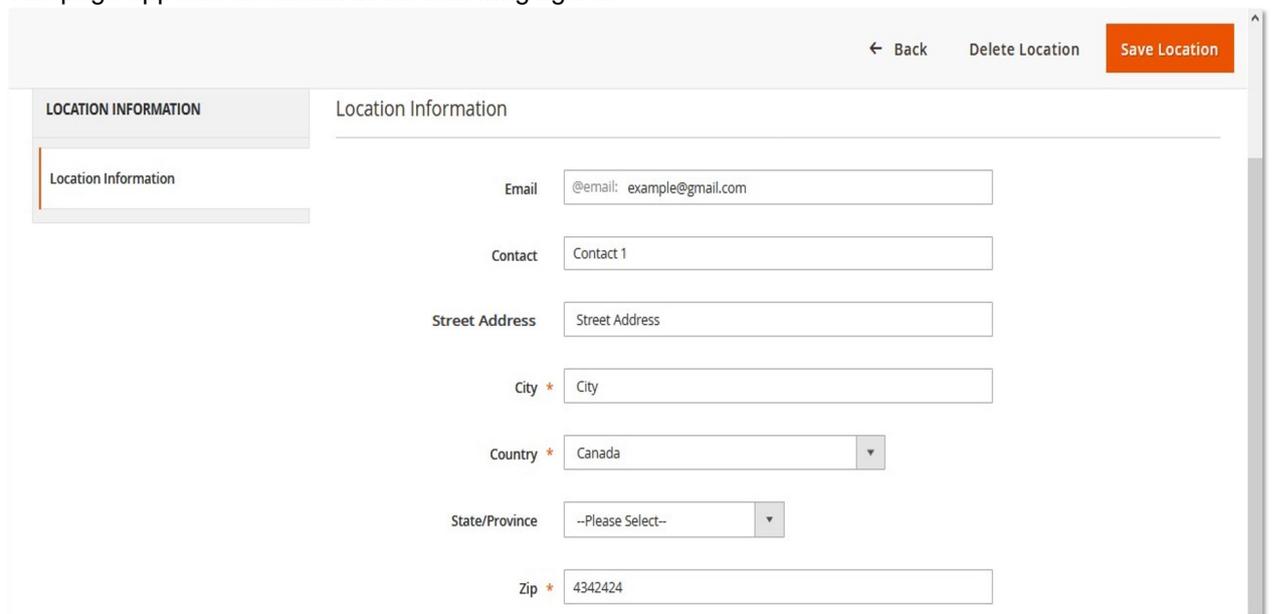
The admin can make changes in the existing locations.

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:

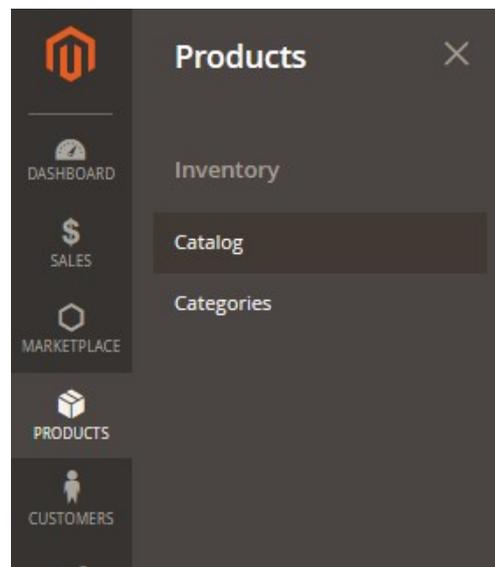
- Add a New Appointment Booking Products(<http://docs.cedcommerce.com/testing/?section=add-a-new-appointment-booking-products>)
- Add Non-working Rules(<http://docs.cedcommerce.com/testing/?section=add-non-working-rules>)
- Edit the Existing Appointment Booking Products(<http://docs.cedcommerce.com/testing/?section=edit-the-existing-appointment-booking-products>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

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:

 A screenshot of the 'Catalog' page in the Admin panel. The left navigation bar has 'PRODUCTS' highlighted with a red box. The main content area shows a table with one record: 'ATX Bikes' of type 'Booking'. An 'Add Product' button is visible in the top right, with a dropdown menu open showing various product types, with 'Booking' circled in red.

ID	Thumbnail	Name	Type	Attribute Set	SKU	Price	Quantity	Visibility	Status	Webs
33		ATX Bikes	Booking	Daily Rent Booking	zads	\$12.00	21.0000	Catalog_Search	Enabled	Main

- 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:

- Enable Product** (website): A toggle switch set to 'Yes'.
- Attribute Set**: A dropdown menu set to 'Default'.
- Product Name** (store view): An empty text input field.
- SKU** (global): An empty text input field.
- Price** (global): A text input field with a '\$' symbol, and a link for 'Advanced Pricing'.
- Quantity** (global): A text input field, and a link for 'Advanced Inventory'.
- Stock Status** (global): A dropdown menu set to 'In Stock'.
- Categories** (global): A dropdown menu set to 'Select...', and a 'New Category' button.
- Visibility** (store view): A dropdown menu set to 'Catalog, Search'.
- Set Product as New From** (website): Two text input fields with a 'To' label between them.

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]

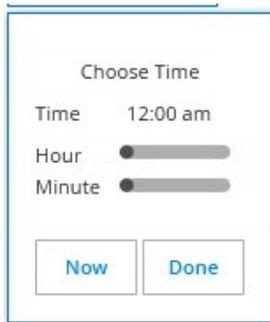
End Time * [global]

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'. It has a header bar with a back arrow, a menu icon, and a trash icon. Below the header, there is a section for 'Option Type' with a dropdown menu currently showing 'Days'. Underneath, there is a section for 'Days' with a dropdown menu currently showing 'Select...'.

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 side-by-side. The left one is labeled 'Days' and has 'Monday' selected. The right one is labeled 'Type' and is open, showing a list of options: 'Select...', 'Full day', and 'Interval'.

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 a light gray panel with two labels: 'Start Date' and 'End Date'. Below these labels 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

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 🔍

Filters 👁 Default View ⚙ Columns

Actions ▼ 27 records found 20 per page < 1 of 2 >

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

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

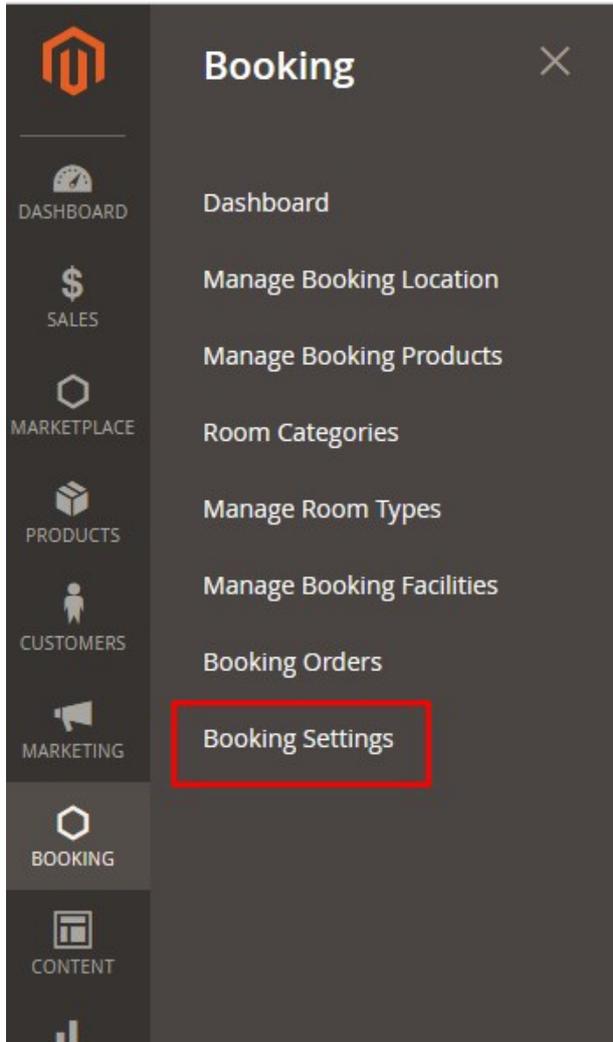
Product Name	Type	Total Days	Check In	Check Out	Quantity
appointment SKU: appointment	booking		Thursday, March 16th 2017 From 9:10 am	Thursday, March 16th 2017 To 10:10 am	1
appointment SKU: appointment	booking		Tuesday, March 28th 2017 From 9:10 am	Tuesday, March 28th 2017 To 10:10 am	1

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 [store view]

Booking Address [global]

Show Calendar [store view]

Max Map Zoom [store view]

Map API Key [store view]

Show Hotel Top Link [global]

Hotel Top link Title [global]

Show Daily Booking Top Link [global]

Daily Top link Title [global]

Show Hourly Top Link [global]

Hourly Top link Title [global]

Show Appointment Top Link [global]

Appointment Top link Title [global]

Filter Settings

Enable Top filter [store view]

Enable Side filter [store view]

Select Side Filters [global]

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

Notification Settings

Banner Settings

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

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

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

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

Banner Image Width [store view]
[px]

Banner Image Height [store view]
[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.