

MULTI-SITE

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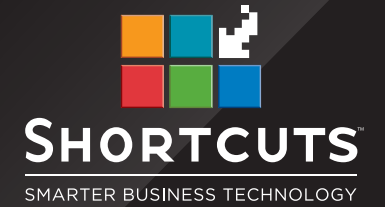
BARBER

CLINIC

ONLINE BOOKING CONFIGURING ONLINE BOOKING SETTINGS

HOME &
MOBILE

BEAUTY



it suits you

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By Erin Lewis

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ABOUT THIS DOCUMENT

The Shortcuts Online Booking feature allows your clients to book appointments via your website, without you having to lift a finger. Once a client makes an online booking, it will be sent straight to your Appointment Book, ready for you to review.

This provides a super-convenient way for your clients to make appointments, and opens your business to opportunities for new appointments around the clock.

Before your clients can start using this feature, you will need to select your preferences in your online booking settings. This will allow you to customise your clients' online booking experience by choosing which options will be available to them.

CONFIGURING ONLINE BOOKING SETTINGS

1

Log into your S.M.A.R.T. system console (<https://console.shortcutssoftware.com>). Then click on the **BookME settings** tile.

2

Select the site you wish to edit from the drop-down menu.

3

Enter the word you want to use when describing this site in a group context.

4

The 'earliest booking allowed' defines how close to the appointment start time a client can make an online booking. Select either days or hours, then enter the desired number.

5

Enter the 'latest booking allowed'. This defines how far ahead a client can make an online booking.

6

Enter the 'latest cancellation allowed'. This defines how close to the appointment the client is allowed to cancel.

7

Enter the 'booking change allowed'. This defines how close to the appointment the client is allowed to make changes.

BookME: Peppermint Park - Ashgrove

Erin Jones Log Out

Select a site:
Peppermint Park - Ashgrove

Save

Sync Agent Password >

BookME Scorecard >

Display BookME Bookings >

Copy Settings >

Upfront Payment Settings >

Home >

BookME Settings

ID: d4b81eb9-8586-e511-be3f-00509563fff01
This read-only field uniquely identifies your site.

Site group: Salons
If you want this site to belong to a group enter the group name in this field.

Earliest booking allowed: 0 Days
This field is used to specify how close to the appointment start time a client can make an appointment online.

Latest booking allowed: 60 days from today
This field is used to specify how far into the future a client can make an appointment online.

Latest Cancellation Allowed: 1 days prior to appointment date
This field is used to specify how close to the appointment date a client can cancel an appointment online.

Booking Change Allowed: 0 days prior to appointment date
This field is used to specify how many days prior to the appointment date a client can change an appointment online (a change to the service, employee or date and time).

Display availabilitys with: 50 % efficiency or more
Shortcuts can take into account an employee's optimal booking interval to determine the most "efficient" timeslot for an appointment (one that will be the most productive for the salon).

Display a maximum of: 10 availabilitys
This field is used to specify how many available timeslots matching the client's criteria are displayed on the Available Times webpage.

- 8** Shortcuts can calculate the most efficient timeslot for scheduling an appointment based on the employee's optimal booking interval. Enter the desired minimum efficiency for online bookings.
- 9** Enter the maximum number of available timeslots matching the client's selection preferences that will be displayed when booking online.
- 10** Enter the maximum number of available timeslots that will be displayed for clients making a booking for a special.
- 11** Enter the number of days that will be searched for availabilities after the client's selected start date.
- 12** Select a sequence number for each category. This determines the order that services are booked in. For example, you may wish to ensure that hair colouring services are always booked in before hair cuts.

Erin Jones
Logout

Select a site:

Peppermint Park - Newstead
▼

✔ Save

Sync Agent Password >

BookME Scorecard >

Display BookME Bookings >

Copy Settings >

Home >

Display availabilities with
Shortcuts can take into account an employee's optimal booking interval to determine the most "efficient" timeslot for an appointment (one that will be the most productive for the salon).

% efficiency or more

Display a maximum of
This field is used to specify how many available timeslots matching the client's criteria are displayed on the Available Times webpage.

availabilities

For specials display a maximum of
This field is used to specify how many available timeslots matching the client's criteria are displayed on the Available Times webpage when searching for availabilities for specials.

availabilities

Search a total of
This field is used to specify how many days into the future after the client's requested date that BookME will search for availabilities.

days after 'Start Date'

Service Booking Order
Configuring a sequence on category allows you to enforce the order of the services booked. When a client selects services out of the defined sequenced order they will be prompted and informed of the automatic change of order.
A service with sequence number 1 will be ordered prior to a sequence number 2 and sequence number 3 service. Services without a sequence number (sequence number 0) will not be re-ordered against those with sequence number. Services of the same sequence number will not be re-ordered.
For example, a salon may wish that a Cut is performed before a Color. By assigning a sequence number 1 to the Cut and a sequence number 2 to the Colour the system will enforce this behaviour.

Category	Sequence
Barber	<input type="text" value="0"/>
Beauty Treatments	<input type="text" value="1"/>
Colours	<input type="text" value="2"/>
Massage	<input type="text" value="3"/>

Facebook main page
The main Facebook page you would like to link to.

Google Analytics Domain Name
The parent Domain Name to be used by Google Analytics.

Google Analytics Tracking Number
This will override the company Google Analytics tracking code. E.g. UA-8765454-18

Google Adwords Conversion Code
This will be added to the BookME booking completion page.

8

9

10

11

12

- 13 Click **choose** to select your Facebook main page. This will open a new window.
- 14 Log into Facebook.
- 15 Select the Facebook page for this site and click **set page**.
- 16 If you are running BookME from your own website and not mylocalsalon, enter your Google Analytics domain name.
- 17 If you want to use a Google Analytics tracking number for your BookME site, enter the number here.
- 18 If you want to use a Google AdWords conversion code for your BookME site, enter the number here.
- 19 Tick the relevant boxes in the 'other BookME settings' section.

The screenshot displays the BookME settings page. At the top right, the user is identified as Erin Jones with a profile icon and a 'Logout' link. Below this is a 'Select a site:' dropdown menu currently showing 'Peppermint Park - Newstead'. A green checkmark and 'Save' button are visible. A sidebar on the right contains navigation links: 'Sync Agent Password', 'BookME Scorecard', 'Display BookME Bookings', 'Copy Settings', and 'Home'. The main content area is divided into sections: 'Facebook main page' (with 'Choose' and 'Clear' buttons), 'Google Analytics Domain Name', 'Google Analytics Tracking Number', and 'Google Adwords Conversion Code'. The 'Other BookME settings' section includes a list of checkboxes for various options like 'Allow email booking requests', 'Show prices of services', 'Capture credit card details at confirmation', 'Reject credit cards that will expire by appointment date', 'Send booking confirmation email', 'Display service duration in booking confirmation screen and confirmation email', 'Restrict BookME bookings to one employee', 'Allow client cancellations', and 'Allow clients to rebook past bookings and reschedule future bookings for services that are not available via online booking.'. Below this are 'Default Tag' (set to '<None>') and 'Employee Selection Type' (with checkboxes for 'Any', 'Male', 'Female', and 'Individual'). At the bottom, there is a 'BookME Site Page Content' dropdown set to 'English - Australia'. A browser window in the foreground shows the URL 'https://console.shortcutssoftware.com/bookme/SelectFacebook...' and a dialog titled 'Facebook main page' with the text 'Please confirm the Facebook page you would like to set as main'. A radio button is selected for 'Peppermint Park Newstead', and a 'Set Page' button is present with callout 15.

A

Allow email booking requests: If there are no appointments available to match the client's selection, they will be able to email a booking request.

B

Show prices of services: Clients will be able to see service prices when booking.

C

Capture credit card details at confirmation: Clients will be required to enter details of a valid credit card when confirming the booking.

D

Reject credit cards that will expire by the appointment date: Credit card details clients supply must be still be valid at the date that the appointment is going to occur.

E

Display service duration in booking confirmation screen and confirmation email: The client will see the service duration when confirming their booking and when they receive the confirmation email.

The screenshot shows the 'BookME Site Page Content' settings page. It includes sections for 'Facebook main page', 'Google Analytics', and 'Other BookME settings'. Callouts A-E are placed over the settings to indicate their corresponding descriptions in the adjacent text blocks.

- Facebook main page:** The main Facebook page you would like to link to. (Callout A)
- Google Analytics Domain Name:** The parent Domain Name to be used by Google Analytics. (Callout B)
- Google Analytics Tracking Number:** This will override the company Google Analytics tracking code. E.g. UA-8765454-18. (Callout C)
- Google Adwords Conversion Code:** This will be added to the BookME booking completion page. (Callout D)
- Other BookME settings:**
 - Allow email booking requests (Callout A)
 - Show prices of services (Callout B)
 - Capture credit card details at confirmation (Callout C)
 - Reject credit cards that will expire by appointment date (Callout D)
 - Send booking confirmation email (Callout E)
 - Display service duration in booking confirmation screen and confirmation email (Callout E)
 - Restrict BookME bookings to one employee
 - Allow client cancellations
 - Allow clients to rebook past bookings and reschedule future bookings for services that are not available via online booking.
- Default Tag:** Select the tag that will be shown against the appointment at Shortcuts PointOfSale. (Callout D)
- Employee Selection Type:** This is used to specify which genders are available in the Employee selection dropdown on Online booking. Only the selected options will show in the dropdown (if individual is not checked, no individual employees will be shown).
 - Any
 - Male
 - Female
 - Individual

Additional page elements include a user profile for Erin Jones, a site selection dropdown (Peppermint Park - Newstead), a Save button, and a sidebar menu with options like Sync Agent Password, BookME Scorecard, Display BookME Bookings, Copy Settings, and Home. The Shortcuts S.M.A.R.T. SYSTEM logo is also visible.

F

Restrict BookME bookings to one employee:

Clients will not be able to book with multiple employees within the same appointment. Multiple services must be booked in with the same employee.

G

Allow client cancellations:

Clients will be allowed to cancel their appointment when they log into their BookME account.

H

Allow clients to rebook past bookings and reschedule future bookings that are not available via online booking:

Clients will be able to rebook past appointments and reschedule future appointments regardless of whether that service is still available in online bookings.

20

Select the appointment tag for online bookings within Shortcuts Fusion.

21

Tick the 'employee selection types' you want to make available during the booking process.

The screenshot shows the 'BookME Site Page Content' settings page. It features several input fields and checkboxes. Callouts are placed as follows: 'F' points to the 'Facebook main page' field; 'G' points to the 'Restrict BookME bookings to one employee' checkbox; 'H' points to the 'Allow clients to rebook past bookings and reschedule future bookings for services that are not available via online booking' checkbox; '20' points to the 'Default Tag' dropdown menu; and '21' points to the 'Employee Selection Type' checkboxes. The page also includes a sidebar with user information and navigation options, and a footer with a language selector.

22

Click **save**.

Facebook main page
The main Facebook page you would like to link to. 132298670162698

Google Analytics Domain Name
The parent Domain Name to be used by Google Analytics.

Google Analytics Tracking Number
This will override the company Google Analytics tracking code. E.g. UA-8765454-18

Google Adwords Conversion Code
This will be added to the BookME booking completion page.

Other BookME settings

- Allow email booking requests
- Show prices of services
- Capture credit card details at confirmation
- Reject credit cards that will expire by appointment date
- Send booking confirmation email
- Display service duration in booking confirmation screen and confirmation email
- Restrict BookME bookings to one employee
- Allow client cancellations
- Allow clients to rebook past bookings and reschedule future bookings for services that are not available via online booking.

Default Tag
Select the tag that will be shown against the appointment at Shortcuts PointO/Sale

Employee Selection Type
This is used to specify which genders are available in the Employee selection dropdown on Online booking. Only the selected options will show in the dropdown (if individual is not checked, no individual employees will be shown).

- Any
- Male
- Female
- Individual

BookME Site Page Content

Erin Jones Logout

Select a site:

Save **22**

- Sync Agent Password >
- BookME Scorecard >
- Display BookME Bookings >
- Copy Settings >
- Home >

CONFIGURING SITE PAGE CONTENT

The changes you make here will only apply to the site you have selected. To change the content for all of your online booking sites, you will need to edit the 'BookME global page content' in your company settings.

- 1 Log into your S.M.A.R.T. system console (https://console.shortcutssoftware.com). Then click on the **BookME settings** tile.
- 2 Select the site you wish to edit from the drop-down menu.
- 3 Scroll down to 'BookME site page content'.
- 4 Make the desired changes by adding text into the text fields.

The screenshot displays the 'BookME Site Page Content' configuration page for the 'Peppermint Park - Newstead' site. The interface is divided into several sections, each with a text field and a rich text editor. The sections are: Confirmation Email Heading, Confirmation Email Body, Confirmation Email Salutation, Terms and conditions text, Service selection text, Time slot selection text, and Start time selection text. A right-hand sidebar contains a 'Save' button and a list of navigation options: Sync Agent Password, BookME Scorecard, Display BookME Bookings, Copy Settings, and Home. The user's name 'Erin Jones' and a 'Logout' button are visible at the top right. The language is set to 'English - Australia'.

BookME Site Page Content 3 English - Australia

Confirmation Email Heading 4
Appears at the top of the booking confirmation emails sent to customers

Confirmation Email Body
This field is used to customise the email a customer receives after making an online booking with BookME. Use these symbols to change the details shown in the email.

- {Client} is replaced with the customer's first name.
- {Site} is replaced with the booked site's name
- {Address} is replaced with the booked site's address
- {Phone} is replaced with the booked site's phone number

Path: p

Confirmation Email Salutation
A short message at the bottom of the booking confirmation email.

Path: p

Terms and conditions text

Path: p

Service selection text

Path: p

Time slot selection text

Path: p

Start time selection text

Path: p

Erin Jones Logout

Select a site:
Peppermint Park - Newstead 2

Save

Sync Agent Password >

BookME Scorecard >

Display BookME Bookings >

Copy Settings >

Home >

SHORTCUTS
S.M.A.R.T. SYSTEM

- 5 Enter your 'cancellation policy'. This is the policy clients will agree to when they provide their credit card details. It will only be shown if 'capture credit card details at confirmation' is enabled.
- 6 Enter your 'credit card confirmation message'. This is a message requesting your clients to enter a credit card number when making bookings.
- 7 Click **save**.

Erin Jones
Logout

Select a site:
Peppermint Park - Newstead

✔ Save 7

Sync Agent Password >

BookME Scorecard >

Display BookME Bookings >

Copy Settings >

Home >

Booking confirmation text

Path: p

B I U ABC |

Path: p

Appointment history text

Path: p

B I U ABC |

Path: p

Manual request text

Path: p

B I U ABC |

Path: p

Cancellation policy
This must be agreed to when the client enters their credit card details. It will only be shown if 'Capture credit card details at confirmation' is enabled.

Path: p

5

Path: p

Credit card confirmation message
This field allows you to enter a message requesting your clients to enter a credit card number when making bookings. This may help reduce false bookings.

Path: p

6

Path: p

Path: p

B I U ABC |

Path: p

B I U ABC |

Path: p

B I U ABC |

Path: p

B I U ABC |

Path: p

COPYING SETTINGS TO ANOTHER SITE

Rather than configuring your settings manually for each site, you can copy your settings from one site to another to save time.

- 1 On the BookME settings page, click **copy settings**.
- 2 Select the site you wish to copy settings from.
- 3 Select the applications you wish to copy the settings for.
- 4 Choose whether you wish to copy your gallery images from the source site. Note that this will override the target site's existing gallery images.
- 5 Choose the sites you wish to copy the settings to. To do this, select the desired target sites on the left-hand side, then click **add sites** to move them over to the right.
- 6 Click **copy settings**.

The screenshot shows the 'BookME Settings' page for 'Peppermint Park - Newstead'. A 'Copy Settings' dialog box is open, guiding the user through six steps to copy settings from one site to another. The background page shows various settings like 'ID', 'Site group', 'Earliest booking allowed', 'Latest booking allowed', 'Latest Cancellation Allowed', 'Booking Change Allowed', 'Display availabilities with', 'Display a maximum of', and 'For specials display a maximum of'. The right sidebar shows the user 'Erin Jones' and a list of site settings including 'Save', 'Sync Agent Password', 'BookME Scorecard', 'Display BookME Bookings', 'Copy Settings', and 'Home'. The 'Copy Settings' dialog box is the central focus, with numbered callouts 1 through 6 corresponding to the instructions in the adjacent list.



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AUSTRALIA AND ASIA

166 Knapp Street
Fortitude Valley
QLD 4006
Tel: +61 7 3834 3232

www.shortcuts.com.au

UK AND EUROPE

Dalton House
Dane Road, Sale
Cheshire M33 7AR
Tel: +44 161 972 4900

www.shortcuts.co.uk

NORTH AMERICA

7711 Center Avenue
Suite 650
Huntington Beach CA 92647
Tel: +1 714 622 6682

www.shortcuts.net

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