

QUICK START GUIDE

Thank you for downloading the BookinBee Quick Start Guide. This guide aims to give you a quick step by step run through of how to set up your new booking system so you can start taking new appointment bookings via BookinBee.

Step 1 – General System Settings

The first step to getting your system set up is to update the General System Settings. These settings can be found by going to:



Work your way through these settings by first selecting the appropriate terminology that applies to your business, then the relevant currency and time zone settings. Once you are done click the **Save Changes** button at the bottom right to finalise the set-up.

Ignore the 'Integrating BookinBee Front-End Into Your Website' section for now.

Step 2 – Add Additional Staff / Users

If you are the only user of your system then continue to step 3.

To add more users, navigate to:

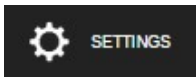


Fill in the staff details form for each additional user of the system, each time clicking the **Save** button at the bottom right of the page once you have completed the form.

Please make sure you supply a valid email address for the user as the account password will be emailed to address you supply.

Step 3 – Add Your Location(s) / Business(es)

To add your locations / businesses simply go to:



→ [Add Location](#) (In 'Locations' Category)
OR
→ [Add Business](#) (In 'Businesses' Category)

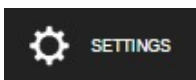
Fill in the form for as many locations / businesses as you want to use the system with, each time clicking the **Save** button at the bottom right of the page once you have completed the form.

Make sure you select all the staff associated with each location.

Please note that from this point on where the guide refers to 'location' it's meaning is equivalent to business also.

Step 4 – Set Up Standard Working Hours

In order for an appointment to be made with a member of staff, the system must be told when they are scheduled to work. To set up staff working hours go to:



→ [Staff Working Hours](#) (In 'Staff' Category) → **Standard** (Tab)

The working hours must be set for each member of staff that can offer appointments at every location they work at.

Select a member of staff from the drop down list, then a location they work at to set their hours for. Make sure the 'Standard' tab (shown above) is also selected.

Use the Gantt chart style interface to define the hours the selected member of staff usually works at the selected location. More detailed instructions for this process can be found on the page.

Click the **Save** button on the right hand side of the page.

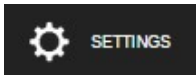
Repeat this process for all remaining staff and locations.

Step 5 – Add Additional Hours

If you or any of your staff work irregular hours or additional hours on top of their standard hours, the additional hours tool must be used to tell the system which hours the member of staff is available to make appointment bookings.

If none of your staff need additional hours added, then continue to step 6.

To set up additional hours navigate to:



→ [Staff Working Hours](#) (In 'Staff' Category) → **Additional** (Tab)

Select the staff member and location from the drop downs in the same way you previously did in step 4. Make sure you have the 'Additional' tab selected as show above.

Select the date and set the time from/to, then click the **Save** button.

Repeat this process for all additional / irregular hours.

Step 6 – Add Staff Holiday

To add any time off (including bank holidays) you or your staff may be taking, you must use the holiday tool. The holiday tool will override both the Standard and Additional Hours tools for the holiday period and not allow any more appointments to be booked with the member of staff at the selected location during this period.

Please note that holiday must also be set on a per staff / location basis.

If you have no holiday to add or would like to revisit this later, continue to step 7.

To set up staff holidays go to:



→ [Staff Working Hours](#) (In 'Staff' Category) → **Holiday** (Tab)

Select the staff member and location from the drop downs the same way you did previously in step 4. Make sure you have the 'Holiday' tab selected as show above.

Select the date and time from and to, then click the **Save** button.

Repeat this process for all remaining holiday.

Step 7 – Add Your Services

Services in BookinBee are added on a per location basis, meaning each service is associated with just one location. If you offer the same service at multiple locations, it must be added for each instance. This allows you to individually control the pricing and availability at each location at a later date.

To add a new service go to:



→ [Add Service](#) (In 'Services' Category)

Fill in the applicable fields and then click the **Save** button at the bottom right of the page.

If a service is marked as the default service for that location, it will automatically be selected when your clients

make a booking and are not sure which service they should choose.

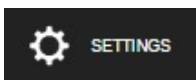
The availability of a service can be set using the same tool as setting up standard working hours for your staff. It is important to note however that although a service may be marked as available at a given time, there must still be an available staff member at that time to be able to offer an appointment and vice versa.

Repeat this process for all remaining services and locations.

Step 8 – Edit Theme Settings (Optional)

If you do not want to edit your theme settings or wish to do so at a later time, continue to step 9.

To edit your Theme Settings navigate to:



→ [Theme Customisation](#) (In 'Miscellaneous' Category)

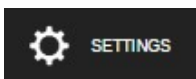
Edit the settings and upload any logos you would like to use, then click the **Save Changes** button to commit your changes.

The front-end theme settings may be easier to customise via the front-end of your system. This is the view that your client's will see when they make a booking. To switch to the front-end mode, click black 'View Frontend' button at the bottom left of your screen. To switch back to the back-end, click the corresponding button in the same place on the front-end.

Step 9 – Edit Email Alert Settings (Optional)

If you do not want to use email alerts or wish to set them up at a later time, continue to step 10.

To edit your Email Alert Settings go to:



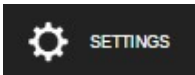
→ [Email Settings](#) (In 'Miscellaneous' Category)

Modify the settings to suit your requirements and then click the **Save Changes** button at the bottom right of the page to make the new settings active.

Step 10 – Edit SMS Text Alert Settings (Optional)

If you do not want to use SMS text alerts or wish to set them up at a later time, continue to step 11.

To edit your SMS Text Settings go to:



→ [SMS Settings](#) (In 'Miscellaneous' Category)

Modify the settings to suit your requirements and then click the **Save Changes** button at the bottom right of the page to make the new settings active.

Please note that even if you have SMS text alerts turned on, you must still have SMS credit for the functionality to take effect.

Step 11 – Add Your Existing Appointments

Now your system is almost ready to become active it is time to transfer any existing future appointments you have booked to your BookinBee system to prevent double bookings. To do this go to:



→ [Add Manual Appointment](#) (In 'Appointments' Category)

Please note this method should not be used to make appointment bookings once your system is set up. This is because this page does not check to see if a new appointment will conflict with existing ones. This page is purely designed to allow you to add appointments at a specified time to help you transfer existing appointments on set up.

For normal use of the system, please use the black  button at the top left of your screen to book a new appointment.

To add your existing appointments work your way through the Manual Appointment form and then click the **Save** button to add an appointment.

Repeat this process for all your future appointments. The information from the previous appointment you save is remembered to help quicken the process. Use the **Start Over** button if you need to reset the form.

Step 12 – Edit Appointment Settings

To edit the appointment settings go to:



→ [Appointment Settings](#) (In 'Appointments' Category)

Update the settings as you require then click the **Save Changes** button to finalise your changes.

If you have chosen to enable the front-end of your system to allow your clients to book or manage appointments themselves, then this is now active and people will be able to find your booking system online and make their appointments.

Step 13 – Incorporate BookinBee Into Your Website (Optional)

If you have decided to allow your clients the option to be able to book or manage their appointments themselves then you will need to incorporate the BookinBee system into your website or add a link to redirect your clients to your system on the BookinBee website. To find information on how to incorporate the BookinBee appointment system into your website go to:



→ [System Setup](#) (In 'Miscellaneous' Category)

The section entitled 'Integrating BookinBee Front-End Into Your Website' contains the html code you need to integrate BookinBee into your website.

It is suggest you use an iframe on your website to display the BookinBee system. Copy the code in this box and paste that into the HTML source code on our website.

If you are a novice computer user you may find it easier to simply place a link on your website to redirect people to your booking system on BookinBee. The link to your system can also be found on this page.

Setup Complete

Set up of your booking system is now complete and you are ready to start taking appointment bookings via BookinBee.

If you have any further questions or wish to give us feedback for new features you would like to see, please use the feedback page to send us your queries / requests. The feedback page can be found by clicking the feedback button.

Thank you for using BookinBee.