book it Live

Your business always on

Account Setup & Configuration

CONTENTS

1. INTRODUCTION

Welcome

Thanks for signing up to the bookitlive online booking software. By now you should have received three emails:

- Welcome email
- Thank you email with your URL link to the login page and your email username
- Your Business Listing Activation email

The next step is to complete the setup of your bookitlive account, which involves adjusting the default account settings to match your business preferences.

If you have signed up as part of a 14-day trial please view the Payment and Account Cancellation details for further information of what actions to take when the 14-day trial period comes to an end.

About this Document

This document provides an overview of everything you need to do in order to ready your account for operation:

- Login & Logoff
- Setting your Account Preferences
- Configuring your Services, Resources, Locations, Categories and Products

Further detail and information on operating your bookitlive software can be found in User Guide 2: Booking Management. These guides are available from the bookitlive Help Centre at https://help.bookitlive.net or via the bookitlive help button on the dashboard.

Overview

bookitlive is a web based online booking software delivered via the internet using a shared infrastructure on-demand model that, by design and architecture, reduces upfront costs and Total Cost of Ownership (TCO) as well as delivering increased business performance.

It enables businesses to minimise their infrastructure and maintenance costs while accessing the latest technology and business solutions with access to frequent upgrades.

The bookitlive web based application is classified as "Software as a Service" (SaaS) and is different from traditional software that needs to be installed on your PC.

Benefits of bookitlive SaaS model

- No up-front costs
- Lower total cost of ownership
- No need for additional hardware or software
- Greater level of support
- No/Low maintenance requirement
- Access to latest technology
- More frequent feature (functionality) upgrades
- Frees up staff to perform core business functions

Functionality

- **Online bookings 24/7** – clients can make, reschedule and cancel bookings at any time via the online public booking view
- **Phone & face-to-face bookings** – take bookings over the phone or at your place of business and enter them manually via your dashboard
- **Minimise no-shows** – send notifications and reminders via email, SMS text and your own calendar software
- **Improve your resource/staff scheduling** – avoid overbooking by tracking all your bookings within the one system
- **Simplify processes** – confirm and deny bookings with a click of a button
- **Immediate payment** – take credit card payment at the time of booking using PayPal or SecurePay
- **View and manage bookings on the road** – with a data connected smart phone (e.g. iPhone, Android)

- **Promote your business with ease** – use client management features to promote your business to clients via email and SMS text message
- **Eliminate phone tag** – reduce the number of calls you need to answer by directing your clients to make their bookings online
- **Create your own adhoc schedules** – create flexible schedules for appointments outside of normal operating hours or define unique timetables for limited events

Public & Private Booking Views

bookitlive offers a choice of views for managing your bookings – both public and private.

The public booking view provides pages where your clients can make online bookings, and purchase packages and promotions themselves. By default the public booking view is visible to the public, but can be disabled if you do not want clients to make their own booking.

See Public View Online/Offline in Section 2 for more details and information on how to activate/deactivate the public view settings.

The details on your business dashboard are private and only visible to you and your assigned users (managers and staff members). You can elect to handle all your booking activities privately via your business dashboard. In this case you and your staff would take bookings and enter them in the system manually.

Payment & Account Cancellation

Payment Information

bookitlive offers the following subscription payment options:

- Credit/Debit Card monthly payment
- Annual payment via card or invoice

No payments are required during the free trial period, payment only occurs when the trial period has expired.

bookitlive also offers discounts for upfront annual payments. (Contact info@bookitlive.net)

Account Cancellation

In the event that you wish to cancel your account you are solely responsible for following the online procedures for cancelling your account. This can be

done from the Settings Menu in your dashboard. See Cancel Account in Section 2 of this document for further details.

A cancellation fee can be charged to manually remove the account if you request cancellation by email or phone message.

⏻ Login & Logout

To login as a provider (Administrator/Manager/Staff Member):

1. Browse to the bookitlive home page https://bookitlive.net
2. From the top of the screen enter your email address and password NOTE: your password is case sensitive.
3. Select the login button

Once logged in your Business Dashboard looks like this:
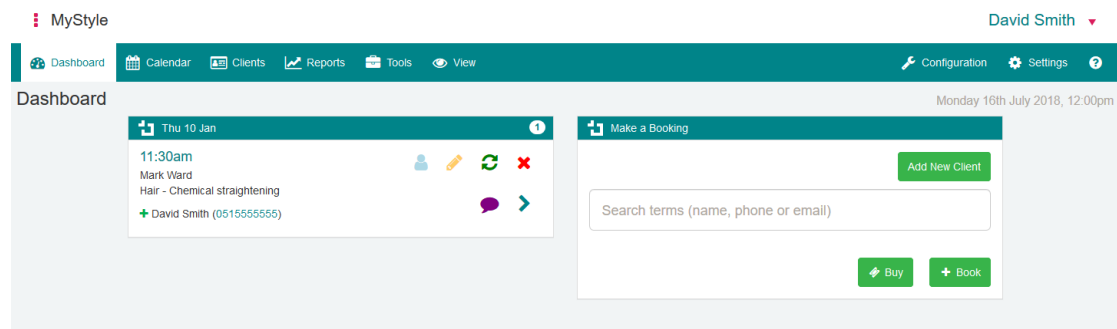
Business Dashboard

In order to set up your account we will be concentrating on the functions that are in the Configuration and Settings menus.

When you're ready to log out you can click on the arrow next to your name on the right-hand side of the screen and select 'Logout' from the drop-down menu. (See the 'Business Dashboard' screenshot above).

2. SETTING

Your account is currently set according to the system defaults. You will need to adjust these preferences to suit your business. All the headings in this section reflect the titles you will find in the drop-down 'Settings' menu in the Business Dashboard.

⚙ Account Preferences

The account preferences page opens up on a basic form that you need to complete. Some of the information will already be entered from your initial sign-up, now you just need to complete the profile. To make it easier to guide you through the process we've broken the booking form down into 5 sections: Business Details, Location & Contact Details, Public View Settings, Booking Rules and Dashboard Settings.

Business Details

Business Details

Account number	125414
Account name	Bounce World
Email	oliver@bounceworld.com
	I want to change my email
Password	*I want to change my password*
Legal/Trading name	
Business identifier	
Business number	
Business type	Trampoline Centre
Business description	BOUNCEWORLD is about a lot more than trampolines.
	Our revolution is about inspiring everyone to forget the serious stuff for a while… and get immersed in an atmosphere of adventure and fun.We are obsessed with customer service. We search the world for the most passionate, friendly and inspiring staff to help deliver a truly awesome customer experience.
Business website	http://
Mini-website	https://test.bookitlive.net/ bounceworld
Facebook page	https://www.facebook.com/ bounceworld
Twitter	https://www.twitter.com/ bounceworld
Instagram	https://www.instgram.com/ bounceworld
Google+	https://plus.google.com/

Business Details

You will find that the bulk of these details have already been filled in during your initial sign-up. However you can always use this section to change your business details (e.g. email) in the future.

Account Number
Your account number is the unique identifier for the account and is used for subscription billing and to identify payment transactions.

Email
The email address listed here is used as the sender address for all email notification to clients. If the email you initially signed up with is not one you wish clients to use, please change it.

Mini-website

Your business details, logos and images (see Account Images) are combined to build a mini website for your business as well as providing information for your online presence. These details will be found by Internet search engines and appear in search results for Google, Yahoo, and Bing etc.

You can pick your own name for your bookitlive web page that will take your clients quickly to your public booking view. This name becomes your sub-domain - your address on the Internet. You may wish to update your phone answering service, stationery and business cards to include this website address. (You can view your mini-website under 'View' on the main menu. Also see User Guide 2: Booking Management for more information).

Example:

> A business named 'My Style' has a short URL of 'mystyle'. The website address for the account would be: https://bookitlive.net/mystyle
>
> You would just need to type 'mystyle' into the 'Mini-website' field.

Promote your business with your FREE mini-website!

Mini-Website Example

Business website

External website refers to your existing business website. The website address that you enter here appears on your mini website page as a link back to your business website.

Social Media links

The social media links (Facebook, Twitter, Instagram and Google Plus) that you enter here appears on your mini website page as icon linking to these pages.

Location & Contact Details

The address details entered here will appear on your mini website page as the contact information for your business.

Location & Contact Details

NOTE: Only one address and time zone can be assigned against an account. If your business has multiple locations in different time zones you will need an account for each one.

Public View Settings

The public view settings control some of the information that clients see in the public booking view.

Public View Settings

Show

The 'Show' function allows you to select how many days of availability you would like clients to be able to view. The default is '7', but you can make up to 20 days visible.

Show service description on public booking list
When this option is selected the service descriptions appear on the public booking view under the selected service. The service descriptions are entered on the Resource and Services page (see Services & Resources in Section 3). If you wish your service description to be on view in the public booking section you can leave this on the default 'Yes'. Otherwise use the drop-down controls to change the setting to 'No'.

Booking Rules

Features grouped under this section are those that set the rules by which your booking system operates.

Booking Rules

Booking start interval
The booking start interval defines the commencement time of a service. It is also used to determine the minimum booking time slots that will be available for a service. You select your preferred interval from the drop-down list.

Example 1:

> **Your business offers the following services:**
>
> **SERVICE NAME**   **SERVICE DURATION**
> Initial consultation   30 minutes
> Standard consultation   45 minutes
> Extended consultation   60 minutes
>
> **You want bookings to commence:**
> **on the hour – quarter past the hour – half past the hour – quarter to the hour**
>
> **The booking start interval = 15 minutes**
> **(you would *NOT* be able to book at 9:10, 9:40 etc.)**

Example 2:

> **You want all your bookings to start every 5 minutes:**
> **9:05 – 9:10 – 9:15 – 9:20 – 9:25 – 9:30 – 9:35 – 9:40 – 9:45 – 9:50 – 10:00 etc.**
>
> **The booking start interval = 5 minutes**

Example 3:

> **You want all your bookings to start on the hour:**
> **9:00am – 10:00am – 11:00am – 12:00am – 1:00pm – 2:00pm etc.**
>
> **The booking start interval = 60 minutes**

Uncancellable period

The uncancellable period is the amount of notice a client needs to give in order to cancel a booking. This is used to prevent clients from making last minute online cancellations. You choose the number of hours you require for advance notification of a cancellation; or leave the field on the default 0 hours if you don't wish to include a notification period.

The uncancellable period can range from 0 hours (off) up to your choice. This restriction only applies to the public booking portal, not to your private home page.

Unbookable period

The unbookable period is the amount of notice you need for a client booking. This is used to prevent clients making short notice online bookings.

You can specify the amount of advance notice your business requires in order to accept a booking. The unbookable period can range from 0 hours (off) up to one week.

Example:

> If you set an unbookable period of 2 hours and the current time is 2:00pm the client will be prevented from making a booking until 4:00pm.

This restriction only applies to the public booking views, not to your private Business Dashboard.

Bookable period

You can specify the bookable period your business allows a client to make an online booking. The bookable period is the amount of time into the future that your business can take online bookings.

The bookable period can range from 1 hour up to 12 months. (The default value is 3 months).

Example:

> If you set an unbookable period of 2 weeks, your clients can only make a booking up to 2 weeks ahead of the current date.

This restriction only applies to clients making online bookings; it does not apply to bookings made via the Provider Dashboard.

Charge cancellation fee

Some businesses charge a cancellation fee when a client fails to turn up for their appointment or cancels on short notice. You can elect to advise your clients that you charge a cancellation fee and the amount of that fee. You will need to define your cancellation policy by indicating how many hours prior to the booking the client can cancel. This would be something you would specify in your email templates or on your website.

bookitlive only advises of the cancellation fee, it does not enforce the payment of a cancellation fee.

Approve all bookings

You can manually approve each booking individually. With this option enabled, bookings remain tentative until you approve them. By having a

confirmation step, the system gives you the opportunity determine if you want to accept the booking and check client details to ensure they are legitimate before approving bookings.

NOTE: Only business that have a low volume of bookings should use this option as each booking requires manual approval.

![book it Live logo]

Dashboard Settings

Dashboard Settings

Approve all bookings
Change the default 'No' setting to 'Yes' if you would prefer to manually approve all bookings that are made on-line.

NOTE: Changing this setting to 'Yes' requires every booking to be manually approved - all bookings are tentative until they are approved. This is only recommended for businesses that have a very low number of bookings. Most businesses should use the default setting of 'No'.

Show dashboard birthdays
The dashboard shows a list of clients who have their birthday today. This is particularly useful if you run a rewards program for clients that gives them special birthday offers. You will need to make sure that this information is collected as part of your client management process (see Client Signup Settings).

Show dashboard cancellations
The dashboard cancellations option will alert you via the dashboard of any recent cancellations. Select 'Yes' from the drop-down menu if you wish to activate this feature.

NOTE: Once you have completed the account information don't forget to click 'Save Settings' on the bottom right of the form.

⚙️ Advanced Settings

Advanced settings are used to turn on extra features for:

- Google Web tracking
- Setting default payment options
- Enabling Memberships
- Enabling locations

Advanced Settings

Google Analytics

If you have a Google analytics account you can enter your tracking ID here in order to be able to track the traffic that uses your public booking pages. To find out more about using Google analytics see:
https://support.google.com/analytics/answer/1008015?hl=en

Google Tag Manager

If you have a Google tag manager account, you can enter your ID here. If you are using Google Tag Manager do not add a Google Analytics tracking ID as Google Tag Manager replaces the Google Analytics.

Take Payment Selection

The 'Take Payment Selection' defaults the take payment tickbox to selected when making bookings from the dashboard. This option is used by business that always want to process a payment when making bookings from the dashboard.

Enable Memberships

If your business provides wants to sell recurring memberships subscription that can be used to validate bookings switch the 'Enable Memberships field to 'Yes'. You will also need to set the Payment Option for each service to use Membership as a form of payment when the service is booked. See Memberships in Section 3.

Note: Recurring Membership subscription payment are currently only available in Australia and New Zealand when your account uses the bookitlive payment gateway or the SecurePay payment gateway.

Enable Locations

If your business provides users with more than one location option for the services offered (e.g. driving school) you would want to switch the 'Enable Locations' field to 'Yes'. In order to do so you will first need to set your account and resource locations. See Locations in Section 3.

⟳ Daylight Savings

Daylight Saving commencement and completion dates vary across different countries and regions. All booking systems rely on your local time being correct to avoid booking conflicts. The setting is used to set the dates when times need to be adjusted for daylight saving (summer time).
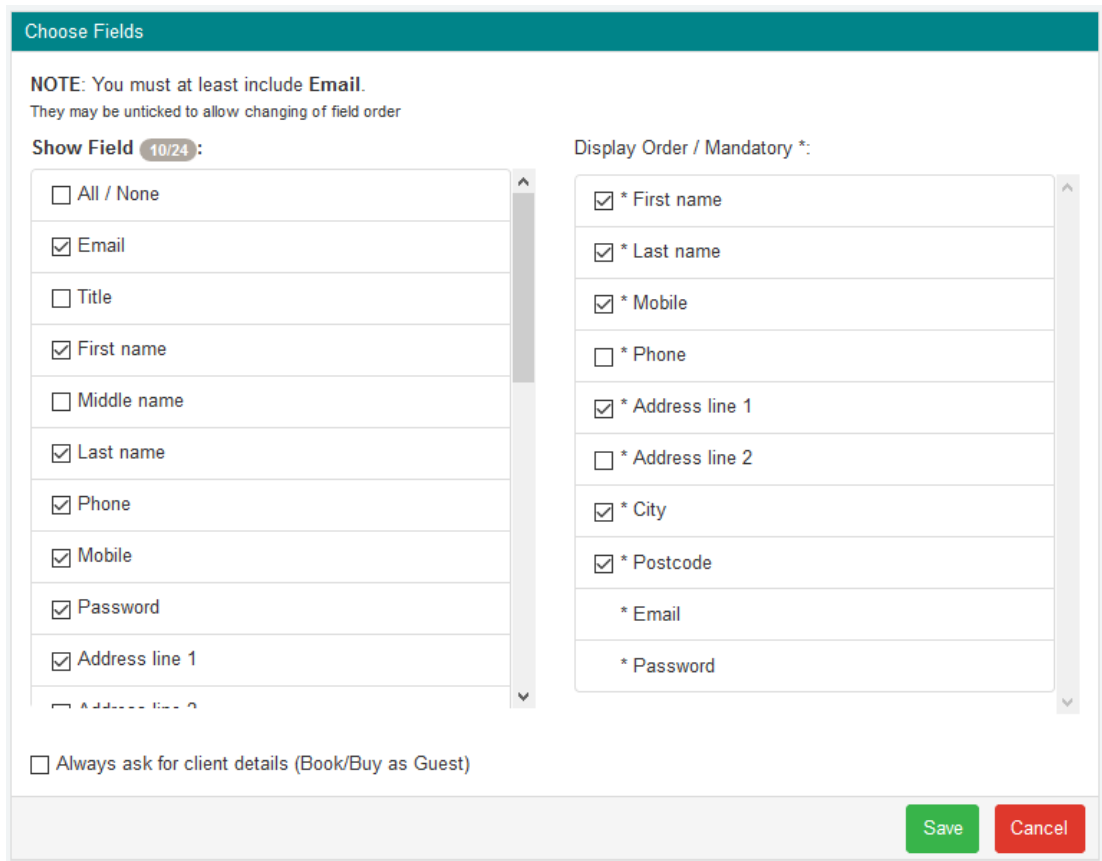
This setting allows you to manage your own Daylight Savings dates to reflect the local time relevant to your business.

Steps:

1. Select 'Daylight Savings' on the 'Settings Menu'
2. Choose the Daylight Savings Start Date from the drop-down calendar
3. Choose the Daylight Savings End Date from the drop-down calendar
4. Click '+' or 'x' under the 'Actions' column to add or remove a Daylight Savings period
5. Click 'Save' to preserve your changes.

📰 Client Preferences

The client preferences is used to select the fields a client needs to complete the first time they make a booking. You can select the fields and the order that you want them to appear. You can also set if a field is optional or mandatory. The filed labels names can be changed using the Terminology setting.

Client Signup Settings

Simply tick or untick the fields in the left box according to the data you would like to collect from your clients as they make their bookings. Once you click an option it will appear in the right hand box.

The right hand box allows you to order your selected items. Items will appear in the right hand box according to the order you tick them in the left box. To rearrange the order of items, untick them in the left box and retick them in the order you would like them to appear.

Clicking on the items in the right box allows you to set them as mandatory information for clients to enter.

Tick the 'Always ask for client details (Book/Buy as Guest)' box if you want to give clients the option of making bookings or but a product as a guest. They will have to enter these details each time they make a booking or product purchase.

⬚ Notification Settings

Notification settings are used to control what is communicated to your clients and staff when bookings and purchases occur.

SMS Notifications

SMS (Simple Message Service) notification can be used to send confirmation, modification and cancellation SMS notification; as well as automatic reminders to your clients of pending appointments. If you elect to switch on SMS notification, an SMS is sent on confirmation and a reminder message will be sent to your client's mobile phone 24 hours before the booking time. If a booking is made for the same day an SMS message is sent immediately.

SMS Settings	Default value	Description
SMS sender name		Add a name or number that will be displayed on the receiving phone
Send booking confirmations	No	Automatically sends confirmation emails when a booking is added
Send booking reminders	Yes	Automatically sends booking email 24 hours prior to the booking time

SMS Notification Settings

NOTE: When SMS notifications are switched on an SMS will be sent to all bookings made from this point forward, but it will not be applied to existing bookings.

All SMS messages are sent using a random number by default. Adding a SMS sender name replaces the random number and will be displayed as the sender name instead. You could set a short name up to 11 characters to represent your business for example FITBIZ. All messages would display FITBIZ as the sending name. Alternatively you could set your own mobile number and your client could reply to your messages.

SMS (Short Message Service) messages are limited to 160 characters; messages greater than 160 character are sent as multiple messages. By default the longer messages are sent from multiple random sender numbers and will appear on the receiving phone as multiple messages. By using an SMS sender name the receiving phone recognises the message as being from the same sender and reassembles the message to present it as one long message.

Email Notifications

When a client makes a booking or when you enter a booking manually you can ensure that a booking confirmation is immediately sent by email to you and the client by adjusting the email settings accordingly (See Notification Settings). The email will contain an Internet calendar attachment that can be loaded into Calendar client (Google, Outlook, Apple) and can be used as an additional reminder for you or your clients. The date and time in the file attachment is the same date and time of the booking that was made in bookitlive. There is no time adjustment made for different time zones.

Example:

> If you are located in London and make a booking against a business in New York for Tuesday 1st April 3:00pm the calendar file will be set to Tuesday 1st April 3:00pm and will load in to your calendar software as Tuesday 1st April 3:00pm

This table shows the email settings available to control the notifications on the account:

Email Settings	Default value	Description
Email daily booking summary	No	Automatically generates a list of future bookings and sends to Administrator's email and additional emails. Batch job runs at 2:00am each day.
Send email reminders	No	Automatically sends booking email reminders 24 hours prior to the booking time.
Send email confirmations	Yes	Automatically sends confirmation emails when a booking is added.
Signatures	Default	Email signatures are added to the bottom of your email communications for confirmation and email reminders. This setting is account-wide and will be used for all email communications unless a signature has been added against a Service. The Service Signature overrides the account-wide signature. By default the signature uses the bookitlive defined signature. This can be edited to define your own signature.

✉ Email Templates

Email templates are used to fully customise the email notifications that are sent to your clients and staff. The email templates use tags to merge your data into your email communications.

Beautiful emails
All email use HTML so you can setup your email templates to match your business branding. The HTML emails editor caters for:

- Fonts
- Font size
- Colour
- Images
- Links
- Tables
- Columns

There are thirteen different types of email templates to choose from depending on your purpose:

Email Template	Purpose
Confirmation to client	Use to send a confirmation of the appointment to the client once booking is completed.
Confirmation to additional notifiers	Use to send a confirmation of the appointment to the client and relevant staff X once booking is completed.
Confirmation to client (payment)	Use to send a confirmation of payment to the client where payment is required to complete booking.
Confirmation to client (voucher)	Use to send a confirmation to the client where a voucher has been used to make the booking.
Reminder to client	Use to send a reminder to the client X hours prior to the appointment
Reminder to additional notifiers	Use to send a reminder to the client and relevant staff X hours prior to the appointment
Booking modification	Use to send to a client upon modification of the booking by either staff or the client.

Booking cancellation	Use to notify the client of a booking cancellation by the business or the client.
Booking cancellation additional notifiers	Use to notify the client and relevant staff of a booking cancellation by the business or the client.
Booking cancellation (payment)	Use to notify the client of a booking cancellation by the client when a cancellation fee is required.
Purchase Confirmation	Use to confirm purchase of a product.
Voucher Purchase Confirmation	Use to confirm purchase of a voucher.
Digital Download Purchase Confirmation	Use to confirm purchase of a product via digital download.

Email Templates and their Uses

For each of the default templates supplied you can select to apply additional tags from the drop-down menu. The tags are categorised according to the following themes:

- Business
- Service
- Resource

- Client
- Booking

Let's step through this for a clearer picture.

In the Email Template image below you can see the default template for a 'Confirmation to client' email. In the email subject line three tags are already included - ***[BUSINESS.NAME]* - *[BOOKING.DATE]* - *[BOOKING.TIME]***.
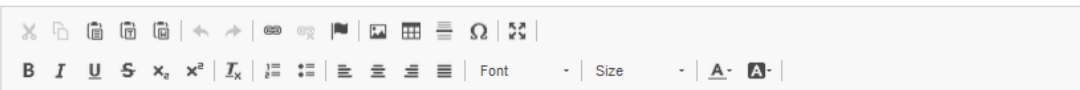
Template

Confirmation to client

Tags

Select tag to insert...

Subject

Booking Confirmation for *[BUSINESS.NAME]* on *[BOOKING.DATE]* at *[BOOKING.TIME]*

Body (HTML)

[CLIENT.FIRSTNAME],

This email is to confirm that you have made a booking with *[BUSINESS.NAME]*

For: *[SERVICE.NAME]*
On: *[BOOKING.DATETIME]*

[BOOKING.OPTIONS]

[BOOKING.NOTES]

Each tag has two parts – the theme (in this case 'Business' and 'Booking' followed by the data to be inserted e.g. 'name', 'date' and 'time'. This data is retrieved automatically from the information stored by the bookitlive system.

Take a look through the body of the email and you will notice that 'Client' and 'Service' tags are included as well as 'Booking' tags. You can elect to add additional tags to the default format by choosing them from the drop-down 'Tags' menu.

Example:

You wish to add the clients lastname to your 'Confirmation to Client' email template.

1. Select the 'Confirmation to client' template from the 'Template' drop-down menu.
2. Position your cursor in the email body next to *[CLIENT.FIRSTNAME]* tag as that's where you'd like the client lastname to appear.
3. Scroll through the drop-down 'Tags' menu to 'Last Name' where it appears under 'Client' and click.
4. A *[CLIENT.LASTNAME]* tag has now been added to the email template. Remove the , between the *[CLIENT.FIRSTNAME]*, *[CLIENT.LASTNAME]* tags and add a space.
5. Click 'Save' to preserve this as the new template.
6. Click 'Revert to Default' or 'Revert to Saved' to reverse any changes

💬 SMS Templates

SMS templates allow you to customise the SMS notifications that are sent to clients for booking confirmations and reminders. (See Notification Settings to set SMS notification as your preferred option).

There are eight different types of SMS templates.

For each of the default templates supplied you can select to apply additional tags from the drop-down menu. The tags are categorised according to the following seven themes:

- Business
- Service
- Resource
- Client
- Booking
- Purchase
- Product

SMS Template	Purpose
Booking cancellation to client	Use to send a cancellation message to the client.
Booking confirmation to client	Use to send a confirmation of the appointment to the client once booking is completed.
Booking modification to client	Use to send a message to the client notifying of a modification to the booking.
Booking reminder to client	Use to send a reminder to the client X hours prior to the appointment.
Booking cancellation to resource	Use to send a cancellation message to the resource (person carrying out the service)
Booking confirmation to resource	Use to send a confirmation message to the resource (person carrying out the service)
Booking modification to resource	Use to send a modification message to the resource (person carrying out the service)

Example:

> **You wish to add the Booking Address and an email option to the 'Booking Reminder to Client' sms template.**
>
> 1. You select the 'Booking reminder to client' template from the 'Template' drop-down menu.
> 2. You position your cursor in the sms body above the *[BOOKING.DATETIME]* tag as that's where you'd like the Booking Address to appear.
> 3. You scroll through the drop-down 'Tags' menu to 'Address' where it appears under 'Business' and click.
> 4. A *[BUSINESS.ADDRESS]* tag has now been added to the email template.
> 5. You position your cursor after the *[BUSINESS.PHONE]* tag and type 'or email'
> 6. You scroll through the drop-down 'Tags' menu to 'Email' where it appears under 'Business' and click
> 7. You have now added: or email *[BUSINESS.EMAIL]*
> 8. You click 'Save' to preserve this as the new template.
> 9. You click 'Revert to Default' or 'Revert to Saved' if you are unhappy with any changes.

Users

During the account setup process a user login was created with your email address and assigned to the business owner role. This user login has the ability to create additional user logins for your account.

There are 3 user roles available:

1. Administrator (Business Owner, 1 role per account)
2. Manager
3. Staff member

Managers

Users	Access level
	✔ Account Images
	✔ Account Preferences
	✔ Add Once-off Schedules
	✔ Bookings
	✔ Calendar
	✔ Categories
	✔ Dashboard
	✔ Daylight Savings
	✔ List Once-off Schedules
	✔ Locations
	✔ Offline Backups
	✔ Opening Hours
	✔ Payment Options
	✔ Promotions & Products
	✔ Purchase SMS Credits
	✔ Remove Availability
	✔ Resources & Services

Staff Members

Users	Access level
	✔ Calendar
	✔ Dashboard
	✔ Remove Availability

You can create additional staff accounts and allocate them as Managers or Staff Members. Adding Managers or Staff Members allows you to control who can access your account and what action they can perform. Using separate staff logons provides an audit trail as booking actions are recorded against the user who performed the action.

Staff access can also be further specified by associating their user logon to a resource(s). Associating a staff logon to a resource(s) controls what bookings are visible to the staff member and provides a link to send notifications to the staff member. (See Resource & Services in Section 4).

🖼 Account Images

The images you add here will enhance the appearance of your business information page. The logo and business images will be displayed on your mini-website and in your directory listing. Just use the 'Browse' function to upload image files from your computer.

Promote your business with your FREE mini-website!

Account Images

⏱ Opening Hours

Opening hours are used to control the hours that a business operates. This information is displayed to clients to communicate the business availability. The default opening hours are set to Monday-Sunday 9:00am to 5:00pm. Your opening hours need to be broad enough to cover the operating hours of all the resources within your business.

Monday	9:00am ⌄ to 9:00pm ⌄ ✚	☐ Closed all day
Tuesday	9:00am ⌄ to 9:00pm ⌄ ✚	☐ Closed all day
Wednesday	9:00am ⌄ to 9:00pm ⌄ ✚	☐ Closed all day
Thursday	9:00am ⌄ to 9:00pm ⌄ ✚	☐ Closed all day
Friday	9:00am ⌄ to 10:00pm ⌄ ✚	☐ Closed all day
Saturday	9:00am ⌄ to 10:00pm ⌄ ✚	☐ Closed all day
Sunday	9:00am ⌄ to 7:00pm ⌄ ✚	☐ Closed all day

Business Opening hours

Split opening hours

Some businesses have defined hours in the day when the business is always unavailable to receive bookings, for example fixed lunch breaks. Multi break periods can be added to any day when a business is open. Bookitlive recommends that split hours should be applied on Resources instead of Opening hours.

Adding split working hours can also enforce booking commencement times. For example if you have a service with a duration of 90 minutes that must always commence on the hour (o'clock), defining split hours will enforce the start time.

This table gives an example of opening hour scenarios:

Sample Business Hours	Set your Opening Hours
9am-5pm	For each weekday use the drop-down menu to select your opening and closing hours
Closed today	Click 'Closed all day' next to the days of the week you are closed. (To reopen just untick 'closed all day')
Open 9am-12pm and then 1pm-5pm (split hours)	Click 'add' to bring up additional hour options and select your hours from the drop-down menu. You can keep adding further splits by clicking 'add' again.

Setting Opening Hours

NOTE: If your business uses multiple resources, set the opening hours broad enough to cover all your operating hours. Split hours would normally be set at the resource level rather than opening hours.

Online Payments

Payment options allows you to choose the payment service you want to use to process credit/debit payments by your clients for bookings and purchase payments during the booking process. Currently bookitlive offers three payment options that can be linked to your bookitlive account:

- bookitlive payment gateway
- PayPal
- Securepay (Australian & NZ only)

A merchant fee applies for process in card payment. Fees vary dependent on the payment service.

Once your account has been connected to the payment gateway you can change your service configuration to accept payment. This is covered in the section on Services & Resources.

Bookitlive Payment Gateway
Bookitlive provides a default built-in payment gateway for those who are not currently using another online payment method.

SecurePay (Australia & NZ only)
A SecurePay payment gateway linked to your bookitlive account allows you to use your own SecurePay account to make both online and manual payments.

1. Select SecurePay from the drop-down menu in the 'payment gateway' field
2. Enter your Merchant ID
3. Enter your Transaction Password
4. Enter the business name of your SecurePay account; the name that will appear on your clients' credit card statements
5. Select 'Save' to confirm your payment settings

NOTE:: PayPal and SecurePay are only available on the Regular or Premium bookitlive packages. Contact bookitlive (info@bookitlive.net) to upgrade to a Regular or Premium package.

PayPal
All you need is a PayPal Business account to accept Visa, Mastercard and PayPal payments. Some countries accept extra card types such as Amex (refer to PayPal for details).

If you don't already have a business PayPal account you can set one up for free at: https://www.paypal.com

Once you have a PayPal account you can link the account to your bookitlive account by following the simple steps below:

1. Select PayPal from the drop-down menu in the 'payment gateway' field
2. Enter your PayPal account email address
3. Enter the business name of your PayPal account; the name that will appear on your clients' credit card statements
4. Select 'Save' to confirm your payment settings

% Coupon Codes

bookitlive Coupon Codes can be created to reduce the cost of a booking by applying a discount that will reduce the booking cost when the discount is applied. The Coupon Codes can also be used as a marketing tool. For example make a booking in October using coupon code ipad and go into the draw to win an iPad.

Coupon codes are a great way to get more bookings, and can help you reward customers who respond to your marketing promotions.

Only one coupon can be used per booking. Coupon codes are not case sensitive.

Coupon details

Coupon name

The name of the coupon (for internal reference) e.g. Get 20% off

Coupon code

The code entered during booking e.g. 25OFF

Coupon Discount type

The discount type determines how the discount is calculated and the amount deducted from the booking total.

Amount off the total booking cost
Percentage off the total booking cost
No discount
Amount off the total

This option discounts the total booking cost by the amount set. If the discount amount is greater than the total booking cost the purchase price will be reduce to zero.

Percentage off the total

This option reduces the total booking cost by the percent amount specified. Option available are in 5% increments from 5% to 100%.

Setting the percentage off to 100% reduces the total booking cost to zero.

No discount

This option is used if you want to record coupons against the booking for other promotional purposes like use this coupon code to go into the draw to win a iPad. No discount is applied against the booking total.

Coupon Expiry

Bookings can only be made for dates up to and including the expiry date. The coupon code cannot be used to make booking beyond the expiry date. After the expiry date the coupon code will automatically be archived.

Coupon Restrictions
A coupon can be limited to specific services and will only be able to be applied when making a booking for the specific services.

Voucher Codes

bookitlive offers a facility to use a voucher code as a payment method during the booking process. Currently bookitlive offers three voucher types – automatically generated, static and pattern vouchers.

A voucher code is used to provide proof of purchase when a customer pre-purchases your services through daily deal promotions or gift certificates etc. You can configure bookitlive to accept voucher codes during the online booking process to confirm proof of purchase.

Validation occurs during the online booking process by checking the entered code to determine if the code is valid for the services being booked, its usage limit, and that it has not expired.

Limiting the times means that the same code can be reused. This method allows codes to be processed without knowing the code ranges in advance.

Your account default for voucher codes is set to 'None/Disabled'. If you want to accept voucher codes during the booking process you need to create a new voucher by selecting one of the voucher types.

Automatically generated vouchers

Voucher codes are automatically generated and sent via email to your customers when they purchase a bookable product from the promotions and product public views. (see Promotions & Products)

This table shows the voucher settings available to create voucher codes:

Voucher Type Settings	Default value	Description
None/Disabled	Yes	The default setting indicates your business does not use voucher codes.
Custom (Pattern)	No	Allows you to define a voucher pattern and assign a usage limit per client. (A pattern code is based on the format of the code provided by the Daily Deal provider such as Groupon, Spreets, Living Social etc).
Custom (Static)	No	Allows you to define your own voucher code and assign a usage limit. (A static code is one you issue yourself – you can enter the exact number).

Voucher Type Settings

Static vouchers

When you create a new static voucher you define the individual code and define how many times a voucher code can be used per client. The code can be restricted to only be used for certain service types.

NOTE: You should use a code range to make each code you issue unique. Adding codes that are the same will replace the existing code.

Pattern vouchers

When you create a new pattern voucher you set the pattern based on the format of the code provided by a third party and define how many times a voucher code can be used per client. In most cases you would only want the codes to be used once, which is the default value. If you sell a promotion that

allows codes to be used multiple times you can assign the number of times a customer can reuse the codes.

A voucher code pattern uses the characters '9', 'X', '/', '-' to define the pattern format of the voucher and security codes.

Use:
- **'9'** - to indicate numbers only
- **'X'** - to indicate letters and numbers
- **'-'** - to indicate that specific character
- **'/'** - to indicate that specific character

Example:

> ### A code pattern of:
>
> - 99/99X would allow a code of 18/12AB
> - 999-XXX would allow 123-abc
> - 99/9999 and a security code pattern of XXXXXXXXX would allow a voucher code of 18/8781 and a security code of 42AAB30A60

Voucher code service configuration
Once you have saved your voucher code configuration use the Services & Resources menu to configure each service that will require voucher codes to be entered at time of booking. (See Confirmation under 'Add Services' in Section 3).

Adjusting voucher code usage
Both generated and custom static code usage can be adjusted to cater for situation where you need to add or reduce the voucher. For example a client shows up without booking a session the code usage can be reduced. You want to add usage to compensate for a bad customer experience.

💬 SMS Credits

SMS text messages are not included as part of your bookitlive subscription, so if you would like to send SMS notifications to clients (see Notification Settings) you will need to purchase SMS credits.

You can track your SMS credit and purchase more credit through the 'Purchase SMS Credits' page. Simply type in the number of credits you would like to purchase and click the 'Purchase Credits' button to proceed.

NOTE: The SMS credits are charged against the card associated with your bookitlive account subscription. One credit is charged for each SMS sent. Messages exceeding 160 characters are sent as multiple messages and consume multiple credits.

Please contact bookitlive info@bookitlive.net if you would like to arrange for a discounted bulk purchase of SMS credits.

📖 Terminology

Most businesses use different terminology to describe their services offerings as well as the information they need to collect from their clients. You can tailor the terminology used when referring to resources, services and locations to suit your business type or industry. The terminology can also be set to rename client field labels to better reflect the information you need to collect when clients make a booking. Client fields can be re-purposed if you need to collect specific information. For example a Driving School could change ID to Driving License No.

Generic Terminology

For example, if you run a tennis court business, you could change Resource to Court instead, and change Service to Session.

The following table gives some example of the terminology that might suit different types businesses.
The following table gives some example of the terminology that might suit different businesses.

Business Type	Service	Resource	Location
Driving School	Lesson	Instructor	Pick up address
Trampoline Centre	Session	Schedule	
Lawn Bowling	Session	Rink	
Fitness Business	Session	Schedule	
Mobile Mechanic	Service	Mechanic	Service Address

Business Terminology

Client Field Label Terminology

Terminology can also be used to change all your client fields to use labels that are relevant to you and your clients.

For Example: If you were a Driving School you could change First Name to be Student First Name or change Last Name to be Student Surname. You can also reuse client fields to collect client information that you need. For example you could change ID to Permit Number if you were a Driving School and you needed to collect the Permit Number for each student.

Button Label Terminology

Button terminology is used to change your booking and buy buttons to words that you want to use. For example: You might want to change Book Now to Book Lesson.

⬭ Public View Offline/ ⬬ Online

Some businesses prefer to make all their bookings themselves via their business dashboard, while others want to allow clients to make their own bookings online using the public booking pages.

The public booking pages can be switched off to stop clients making their own bookings and purchases. When the Public View is offline clients/customers will not be able to access the public booking pages to make bookings and purchases. When your account is set to offline a message will appear in the header of your dashboard indicating your account is offline to public bookings and purchases.

This menu item doesn't open a page, clicking on it simply turns the public view on or off.

⊗ Cancel Account

In the event that you wish to cancel your account you are solely responsible for following the online procedures for doing so. By clicking on the 'Cancel Account' menu item you will open a page where you can confirm your intention to cancel your business account.

Any unused account fees pertaining to your early withdrawal from bookitlive will remain the property of bookitlive and if you wish to rejoin at some later stage, you will be required to start a new billing cycle, paying for your first month in full.

3. CONFIGURATION

Configuration features allow you to add the actual resources and services that your clients will be booking, as well as packages and promotions available for

purchase. All of the features in this section appear under 'Configuration' on the main menu.

Services

Services and resources are bookable business offerings. In the case of services this could be a treatment, class, course, tour, lesson etc. Depending on the kind of services you offer, a resource could be the person performing the service (Personal Trainer, Therapist, Dentist, Tour Guide, Driving Instructor, Trainer) or an object or device required for the service (Boat, Room, Tennis Court, Bouncy Castle, Flight Simulator). You can change the 'Resource' and 'Service' terminology to match that used by your business in the settings menu (see Terminology in Section 2).

Add Services

The details of the Services you offer will be visible to your clients via the Public Booking View.

NOTE: A service must have a resource assigned to it in order for it to be available for bookings. The resource provides the available dates and times when the service can be performed. (See Resources).

bookit Live

	1 hour session
Service Name:	1 hour session
URL:	https://test.bookitlive.net/privatebooking/bounceworld/S1906c8ac2d
	☑ Visible from public view
Description:	One hour jumping session. Access all areas.
Category:	(None) ▾ Manage »
Duration:	1 hour ▾
Break time:	No break ▾ afterwards
Fixed Start Times	☐ Has fixed start times
Cost:	$ 15
Variable Costs:	☐ Has variable costs
Payment Options:	☐ None
	☐ Pay Later
	☑ Pay Online
	☐ Voucher Code
Group Booking:	☐ Yes
Public settings:	☑ Show duration
	☐ Allow Resource Selection
	☐ Show Booked Out Times

Service Configuration

Service Name
The name of the services you enter will appear on your business information page in alphabetical order. If you need to change the service order, use the 'Adjust Display Order' button to reorder the service list.

URL
The URL is the link to directly book this service and can be used on websites and in email marketing where you want to direct customers to book a specific service (Other services cannot be selected using this link). This link can also

be used as a private booking link when the Service is not visible to the public (Visible from the public view = No).

Service Description
Please include a short description that describes the service.

Categories
A Service can be grouped under a category to group the services under a heading on the mini website. Categories need to be defined from the Settings – Categories to make this selection.

Duration
Service duration is the amount of time it takes you to perform the service. This is also the amount of time your clients should expect to spend at the appointment. Select a time from the drop-down menu.

Break time
The break time allows for any additional time needed between bookings to cater for clean up, processing payments, preparation for the next client or travel between bookings. The break time options are based on the booking interval that is defined on your account (see Booking start interval in Section 2).

The break time is added to the service duration time when the booking is scheduled and appears, and will be reflected on your booking sheet as the total duration (duration + break).

Example:

You have a booking interval of 15 minutes:

You can define a break time in 15 minute blocks
15 – 30 – 45 –60 etc.

You have a booking interval of 10 minutes:

You can define a break time in 10 minute blocks
10 – 20 – 30 – 40 – 50 – 60 etc.

Fixed Start Times

Fixed start times allows you to define the time within an hour when a service is available to be booked.

Each service has the option to define the fixed booking start times. Setting fixed booking times limits the times that are displayed to be booked based of the fixed times selected.

Fixed Start Times   ☑ Has fixed start times

☐ 15 mins

☐ 30 mins

☐ 45 mins

☑ 60 mins

Fixed Start Times

For example: If your business is configured to operate in 15 minute interval to cater for a variety of services of different durations.

A Service without fixed booking times defined (Default setting) will display all the times available to be booked within the hour this would include 15min (Quarter past), 30min (half past), 45min (quarter too), 60min (00 o'clock).

book it Live

Session

One Hour Jump Session ▼

This is my first service. Please do not book yet as details have not been finalised.

« Prev | 📅 Tuesday, 23rd February 2016 | Next »

Tuesday, 23 February 2016

TIME	SESSION	AVAILABLE	
1:15pm	One Hour Jump Session	20	Book Now
1:30pm	One Hour Jump Session	20	Book Now
1:45pm	One Hour Jump Session	20	Book Now
2:00pm	One Hour Jump Session	20	Book Now
2:15pm	One Hour Jump Session	20	Book Now
2:30pm	One Hour Jump Session	20	Book Now
2:45pm	One Hour Jump Session	20	Book Now
3:00pm	One Hour Jump Session	20	Book Now
3:15pm	One Hour Jump Session	20	Book Now
3:30pm	One Hour Jump Session	20	Book Now
3:45pm	One Hour Jump Session	20	Book Now
4:00pm	One Hour Jump Session	20	Book Now

*With **no** fixed start time set*

A Service with fixed start times defined will only display the fixed start times that are set. If the fixed start time was set to 60 mins the only times displayed to be booked within an hour would be 60 min on the o'clock time.

Session

One Hour Jump Session

This is my first service. Please do not book yet as details have not been finalised.

| « Prev | Tuesday, 23rd February 2016 | Next » |

Tuesday, 23 February 2016

TIME	SESSION	AVAILABLE	
2:00pm	One Hour Jump Session	20	Book Now
3:00pm	One Hour Jump Session	20	Book Now
4:00pm	One Hour Jump Session	20	Book Now

With fixed start time set

An Indoor Trampoline Centre offers both 1 hour bounce sessions and 45 minute Fitness Classes. As the sessions are of different durations the account has a booking interval set of 15 minutes.
The 1 hour bounce sessions only operate on the hour (o'clock, 60 min) the fitness session occur at 6:45am on Mondays and 6:15pm on Thursdays.
The service for the 1 hour bounce sessions is configured with fixed start times set to 60 mins. The times displayed for 1 hour bounce sessions are on the hour only.

Adding additional times for peak periods.
Fixed booking times makes it easier to add additional times for busy periods as the fixed times are enforced for all schedules including additional schedules (flexible) that are added individually. For example if you are an Indoor Trampoline Centre and want to increase your times over the School holidays Add a schedule for the days you want to increase

Show Duration
Some businesses only want to allow clients to select a booking time and do not wish to advise clients of the duration of the service. For example a car service or restaurant may not have a fixed duration time for their service and may not wish to advertise a duration end time as part of the booking process.
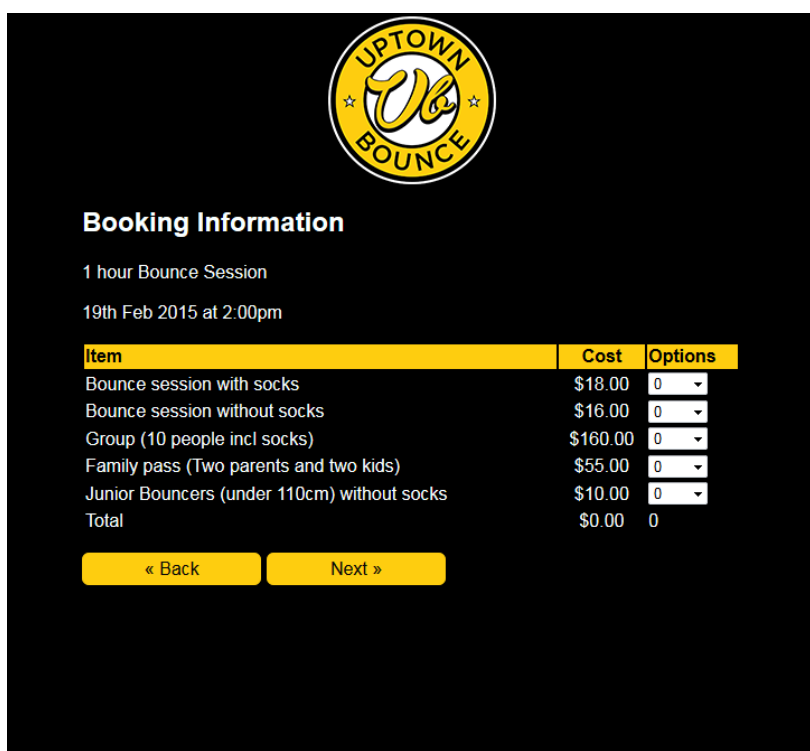
Setting show duration to 'No' hides the duration details from the public booking view.

Cost

This is where you enter the price you charge to perform the service. The cost entered is displayed as the price on the public booking interface. If no cost is entered, the public booking interface will not display any costs.

Variable Costs

Variable costs are used when the service has multiple pricing; for example different pricing for children and adults, or for individuals and groups.

Pricing Example

Payment Options

You can set the requirements for payment for a booking. Select 'None' if you have no requirement for payment. If however, you require payment or validation with a voucher code or membership select the relevant options. (See Voucher Codes in Section 2 if you would like to set up the use of voucher codes or Memberships in Section 4).

Group Booking

If the service is one that accommodates more than one client at a time (e.g. a cooking class) then select 'Yes' from the drop-down menu. If the service is for an individual client then select 'No'.

Visible from public view

'Visible from public view' determines if a service can be selected to be booked from the public booking view. If it is set to 'Yes' (the default setting) the service will be visible in the public booking view. If it is set to 'No' the service will not be visible and will not be available for clients to book online. It will still be visible in the provider view and can be booked via the provider portal. This allows a business to internally manage service bookings without allowing public bookings.

Allow Resource Selection
When multiple resources perform the same service a resource needs to be selected when making a booking. By default resource selection is set to 'yes', so a resource selection occurs. When only one resource is assigned to a service, no resource selection is required as it is the only resource.

Show Booked Out Times
Some businesses may find it advantageous to show booked out times in the public booking view, to encourage clients to make a booking. If you prefer to keep your booked out times hidden from view select 'No' from the drop-down menu.

Signature
bookitlive allows you to customise the signature on the communications that are sent out to your clients via the booking service. You can alter the default signature to your own preferences.

Remove this service
All services can be deleted once any outstanding bookings have been removed and the service has been unallocated from all resources.

≣ Resources

The Resources page is where you configure the resources your business has. The resources perform the services offered by your business.

Resources can be your team members, instructors, practitioners, consultants, course leader or coaches. A resource could also be a physical item. This could be a room, vehicle, sports pitch, piece of equipment, etc.
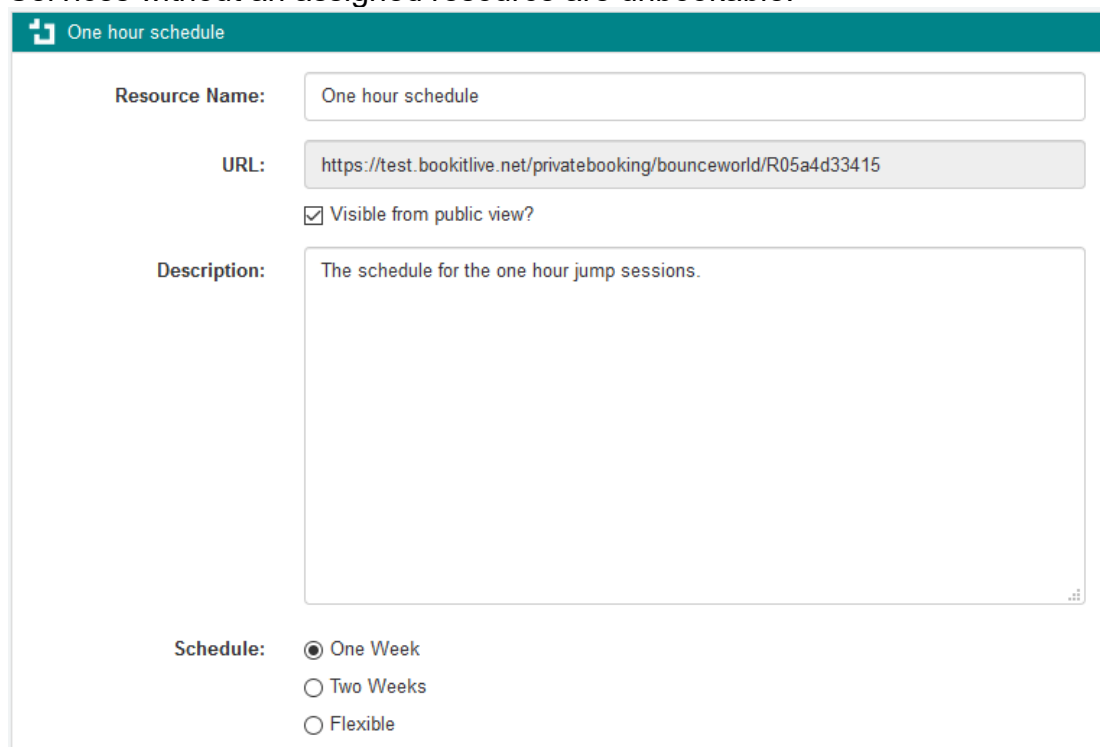
Add Resources

Depending on the kind of services you offer, a resource could be the person performing the service (Personal Trainer, Therapist, Dentist, Tour Guide, Driving Instructor, Trainer) or an object or device required for the service (Boat, Room, Tennis Court, Bouncy Castle, Flight Simulator)

A resource can perform a single service or multiple services based on its scheduled availability.

Resource details will be visible to your clients via the Public Booking View.

NOTE: You will need a resource assigned for each service that you offer. Services without an assigned resource are unbookable.

Resource Configuration

Add Resources

Resource Name
Your resource name could, for example, be the name of the person carrying out the service, a generic name like 'Instructor 1' or a class name 'Strength Class Schedule'.

URL
The URL is the link to directly book this Resource and can be used on websites and in email marketing where you want to direct customers to book a specific Resource (All Services offered by the Resource will be able to be booked). This link can also be used as a private booking link when the Resource is not visible to the public (Visible from the public view = No).

Description
Please write a brief description for your resource.

Visible from public view
'Visible from public view' determines whether the resource can be selected for booking from the public booking view. If it is set to 'Yes' (the default setting) the resource details will be visible in the public booking view. If it is set to 'No' the resource will not be visible and will not be available for clients to book online. It will still be visible in the provider view and can be booked via the provider portal. This allows a business to internally manage service bookings without allowing public bookings.

Schedule
A resource needs a schedule to determine its availability to perform a service. Both recurring (fixed) and/or individual (flexible) schedules are used to indicate availability of a resource to perform a service. A resource can use a fixed, flexible schedule or combination of both.

Schedule Type	Description	How it works
Fixed Schedule	Used to set ongoing resource operating hours that are the same each week or fortnight	Week 1 (for a weekly recurring schedule) Week 2 (for a fortnightly schedule)
Split Schedules	Used in daily schedules to cater for breaks and enforcing service start times	Multiple time periods can be created for the same day enforcing breaks between them.
Flexible Schedule	Used to define availability by an individual date and time for irregular operating hours.	Add each scheduled time separately (it does not recur)

Schedule Types

Availability

Monday   ☐ N/A all day

| 9:00am | ⌄ | to | 9:00pm | ⌄ | ✚ |

Tuesday   ☐ N/A all day

| 9:00am | ⌄ | to | 9:00pm | ⌄ | ✚ |

Wednesday   ☐ N/A all day

| 9:00am | ⌄ | to | 9:00pm | ⌄ | ✚ |

Thursday   ☐ N/A all day

| 9:00am | ⌄ | to | 9:00pm | ⌄ | ✚ |

Friday   ☐ N/A all day

| 9:00am | ⌄ | to | 10:00pm | ⌄ | ✚ |

Saturday   ☐ N/A all day

| 9:00am | ⌄ | to | 10:00pm | ⌄ | ✚ |

Sunday   ☐ N/A all day

| 9:00am | ⌄ | to | 7:00pm | ⌄ | ✚ |

Recurring Schedule

Resource Constraints

Booking rules determine if a booking can be made against a resource at a particular time and are used to stop over-booking from occurring. Resource constraints are used to determine which booking rules apply.

- **Resource based constraint**

  When a resource is performing a service that requires one-on-one interaction with a client they can only service one client at a time. Once this person is booked for a timeslot the booking rules then restrict any further allocation of this resource for that timeslot.

- **Daily limit constraint**

  In contrast a daily limit constraint allows a resource to be booked for the same timeslot multiple times up to a maximum number per day, regardless of any existing allocations.

47

NOTE: In the case of single participant resources, all resources should be set to use the default setting of 'Resource based' constraints.

Constraint	Description
Resource based	Allows a timeslot to be booked once for single participant bookings and multiple times for group bookings up until the limit
Daily Limits	Allows a resource to be booked for the same timeslot multiple times up to a maximum number per day.

Constraint Types

Capacity Constraints:
- ◉ Controlled by Service (default)
- ○ Shared across days schedule
- ○ Shared across time slots

Client Constraints
Client booking rules are used to control how many times a client can make a booking for the same time slot.

- **Client based constraint**

  When Client Constraints are set to **One booking per time slot i**f a client attempts to make an additional booking for any resource in the same time slot the booking will not be allowed. A message will be displayed indicating the client already has a booking for that time slot.

- **None (Default)**

  This is the default setting. Setting client constraints to None allows a client to book multiple resources at the same time. Unlimited bookings can be made in a time slot for the same or different resources. Businesses that need to allocate multiple resources per time slot to complete their service offering would set client constraints to None.

  NOTE: Most businesses would only allow a client to make a single booking per timeslot as a client cannot be at two places at the same time.

Constraint	Description
None	Allows a client to make multiple bookings for the same timeslot
One booking per time slot	Allows a client to make one booking per timeslot

| Client Booking Constraints: | ○ None (default) |
| | ◉ One booking per time slot |

Linked Services

This allows you to allocate a resource to one or more services. Remember that services without an allocated resource are unbookable. In order to complete this section, you will first need to have created a service from the Configuration > Services page. Select which services you wish to allocate to the resource. You can allocate one resource to multiple services. Conversely one service may be allocated to multiple resources.

▤ Category

Categories allow you to group your Services and Promotion together. Categories are used on your mini web site page to allow clients to easily find and book services or purchase promotions, bulk packages and vouchers.

For example

A fitness studio might have different categories for dance classes, yoga classes, spinning classes and other categories for purchasing products for bulk class session passes or memberships.

A driving school might have different categories for Initial lessons and ongoing lessons and other categories for purchasing products for bulk lesson packages and special promotions.

Category Name: Jumping Sessons

Description:

External More Information URL:

Linked Services:
This is the list of services which are using this category.

☑ (All / None)

Linked Products:
This is the list of products which are using this category.

☑ (All / None)

remove this category

Add Category

📍 Locations

Locations are generally used for mobile businesses or events that require a client to select a location when they make a booking.

The location is where the appointment or event will take place. This could be a client's house, place of business or venue etc. A meeting point (pickup address), physical office/store or venue.

Locations can be used for the following business situations:

Mobile businesses
Mobile businesses use 'Locations' to define the areas where the business and their resources (staff) operate. The booking process requires a client to select a location and enter the address where you need to visit. the types of businesses that would be:

Driving Schools
Mobile Mechanics
Mobile Hair Dresser
Mobile Tyre fitting service

Events at different locations
Event-based businesses operate out of multiple venues. The customer needs to select the location of the event.
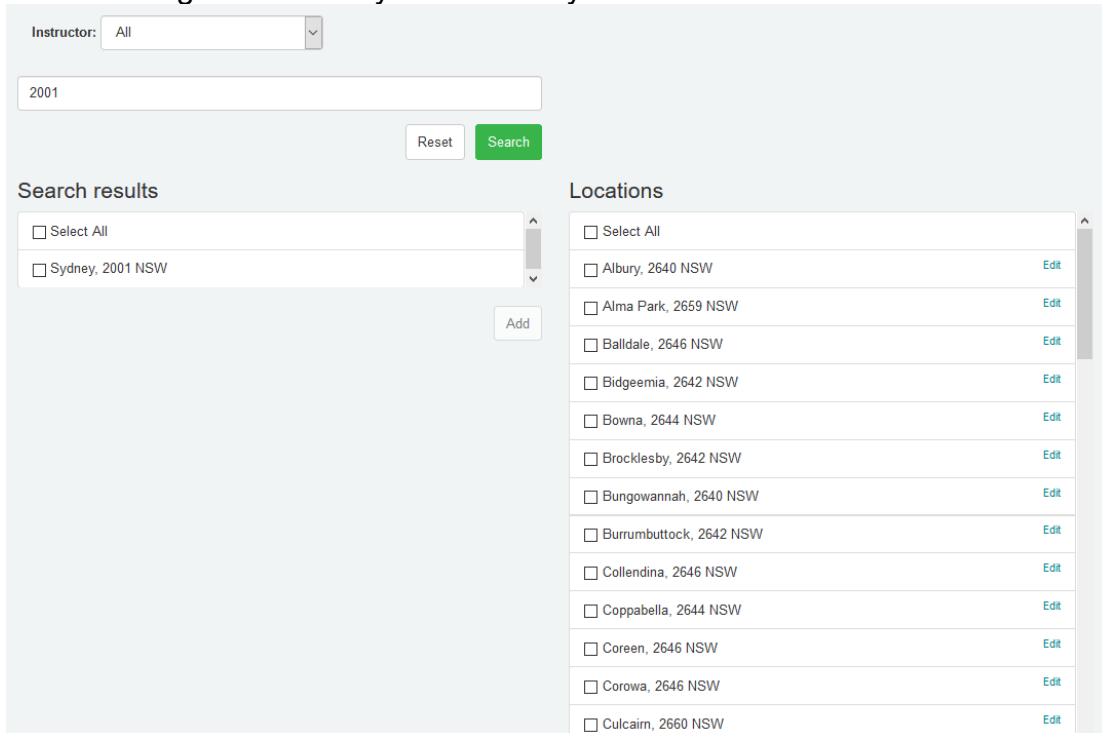
Business that operates multiple locations
If a business has staff that operates from different locations on different days, a resource will be needed for each location.

NOTE: Do not use locations when a business has dedicated resources for each location or wants to restrict access to managing bookings at a location. In these situations each location should use a separate bookitlive account.

Location configuration for all resources

When adding locations to your account you can:

All Resource Location

- Define the locations where your all business resources operate
- Edit and add fixed address details for each suburb (if required)

Location configuration for individual resources

When adding locations to an individual resource:

- Define the locations where an individual resources operate
- Edit and add fixed address details for each suburb (if required)

Steps:

Configure All Resource Locations
- Define the locations serviced by your business. You can select by searching for a suburb or a postal code.
- Add fixed address details for each suburb if required. E.g. a driving school may define a central pickup location for each suburb.

Configure Individual Resource Locations
- Define the suburbs for each resource that operates in your business. Resources may have individual servicing areas.
- Add fixed address details for each resource if required.

Switch on Location
- Once the locations have been configured location can be enabled from the Advance Settings page.

🛒 Products

With the online promotions and product purchasing module you can generate more sales by creating products offering to cater for:

- Simply product purchase
- Discounted Deals and special offers
- Bulk purchases of session passes
- Memberships & recurring payments
- Digital products such as a Meal Planner or Training material (PDF)

The bookitlive product purchasing module is a simple way for your customers to purchase prior to booking. You can even sell direct from your Facebook page. Connect your preferred payment gateway to your bookitlive account (see Payment Options in Section 2) and you will be selling promotions in minutes.
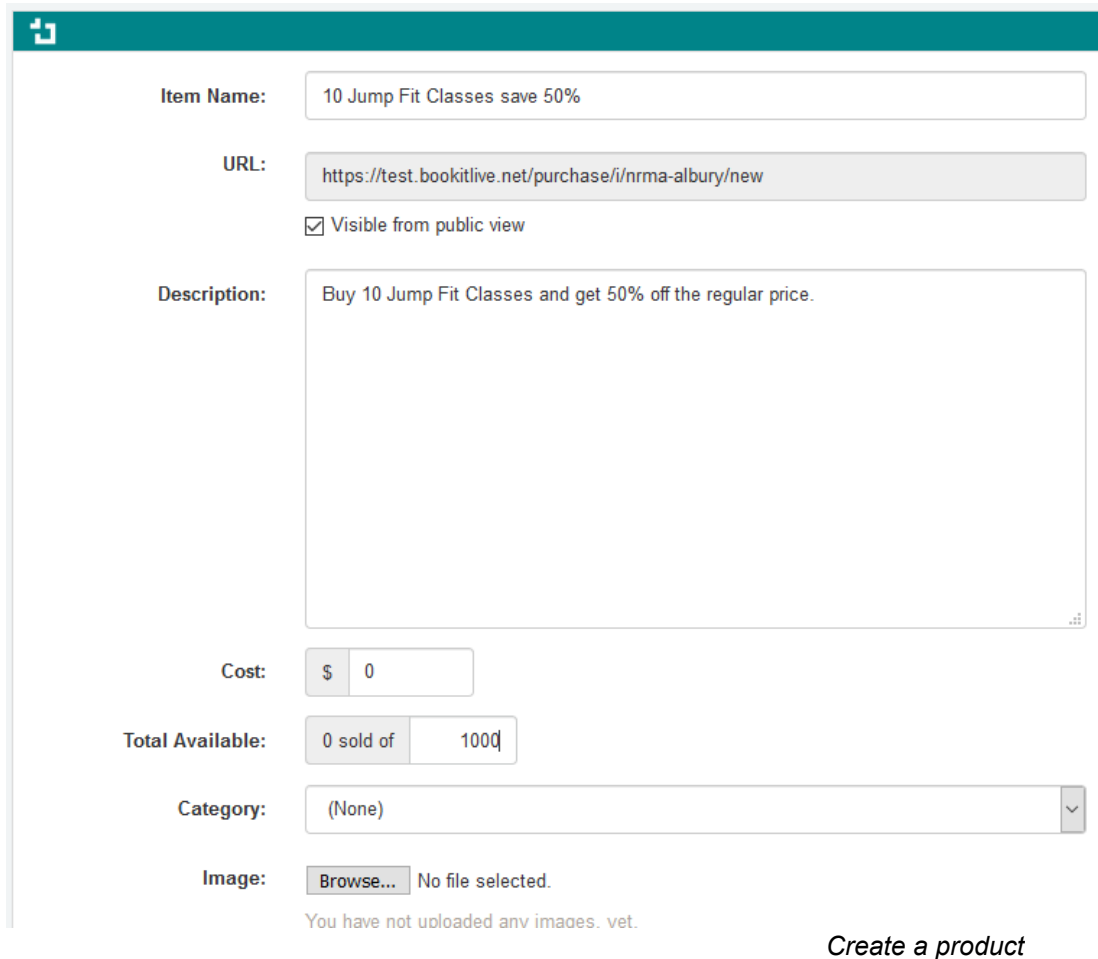
Payment options include:

- **Bookitlive gateway** – all you need is a bank account to accept your money
- **SecurePay** – payment gateway connected to your merchant bank account
- **PayPal** – business account

Add Products

The Products page is where clients can see what you have on offer. It also makes it easy to offer clients special deals and discounts.

You will need to fill out a form with details about the item.

Create a product

Item Name
The name of the item you mention will be listed in the public booking interface.

URL
The URL is the link to directly purchase this product and can be used on websites and in email marketing where you want to direct customers to purchase a specific product. This link can also be used as a private purchase link when the product is not visible to the public (Visible from the public view = No).

Description
Please write a brief description of the item on offer.

Cost
This is where you enter the price you charge for the item. The cost entered is displayed as the price on the public booking interface. If no cost is entered, the public booking interface will allow the item to be obtained for free.

Visible from Public View

'Visible from public view' determines if the item can be selected to be purchased from the public view. If it is set to 'Yes' (the default setting) the item will be visible in the public view. If it is set to 'No' the item will not be visible and will not be available for clients to purchase online.

Total Available

The total available is the total amount of this product that can be sold. Once the amount is reached the product will be displayed as sold out.

NOTE: If you do not want to limit the amount of product available set this number to a high value of 100,000 or more. This amount can be changed at a later date to make more the product available.

Category

You can set categories for your Services and Products to manage the way they appear in your mini-website. This is particularly useful if you have a broad selection of offerings.

Image

You can add a product image by selecting a file to attach using the 'Browse' function.

Generate Voucher

You may wish to sell vouchers that can be used to book particular services.

In order to complete the drop-down form you will need to:

- Enter the expiry dates for the voucher if applicable
- Select which of your existing services it can be used for
- Choose whether to customise the Voucher Confirmation Email or use the default version displayed

Generate Voucher

About Promotions

Bulk Purchases
You can encourage customers to buy in bulk by offering discounts for
purchasing blocks of bookings that can be redeemed against future bookings.

Example:

**A customer purchases a 10 class fitness package from your
promotions page**

- An account is created at time of purchase
- An email is automatically sent with a voucher code that can be used
  to make 10 bookings

This could be used by Fitness Trainers, Golf Instructors, Driving Instructors
etc. to sell a lesson packages.

Gift Certificates
Build your customer base by selling gift certificates from your website that
customers can redeem against future bookings.

Digital Products
Earn extra income by selling fact sheet and meal planners online. The digital product is automatically sent via email at the time of purchase.

Deals and Special Offers
If you have used bookitlive to book a daily deal in the past you have a client list that you can use to offer your own deal. Instead of using a daily deal provider such as Groupon where they take half the money, sell directly using the bookitlive promotions module and receive the full amount.

As you can link vouchers to a service, you can define the booking schedule to occur during your quiet times and reserve the busy times for your full-fee paying customers.

It's simple, just:

- Setup the deal or special offer on your bookitlive products page
- Promote the offer by sending out an email to your client database directing them to your promotion.

Your clients purchase the deal online and they are automatically sent an email with the voucher code. At a later date they can book online themselves using the voucher code.

Packages
Attract new customers with 'buy one get one free' offers or with discounts offering a percentage of the full price.

Free Promotions

Offering the ability to 'try before you buy' is a great way to get new customers to come to you. Once at your location you can up sell your services and products. As the new customer enters their details when they get the free promotion you have their details to contact them.

Depending on your business you could offer:

- Free introductory Fitness Session
- Free driving Lesson
- Free Golf Lesson

You can set categories for your Products to manage the way they appear in your mini-website. This is particularly useful if you have a broad selection of offerings. Once you have entered a category name and description you can also create a link to one of your existing services and to other products. There is also the option of adding a URL link to further information about the product.

👤 Membership subscriptions

Membership subscriptions and recurring payments makes it incredibly easy to create and manage recurring membership subscriptions. The memberships can be sold online from your mini website or promotions & products pages. Once initial membership has been purchased bookitlive will automatically process the recurring Membership payment to automatically renew the Membership.

Membership subscriptions and recurring payments is only available for businesses on the bookitlive regular and premium packages that operate in Australia and New Zealand.

How it works

Customers purchase the membership subscription from your mini website or promotions & products pages and completes the initial membership payment. The card details are stored on the payment gateway to be used for the future subscription recurring payments.

The stored card details can also be used for other product purchases and booking payments.

Activating Memberships

Memberships can be switched on from the Setting -> Advanced setting page. Select Memberships to "yes" and save.

Creating Memberships

Creating memberships is similar to creating products used for generating vouchers.

Use Configuration->Promotion and products page to create a new membership product.

Item Name

The name of the membership subscription. This will appear on your public pages.

URL

The URL is the link to directly purchase this product and can be used on websites and in email marketing where you want to direct customers to purchase a specific product. This link can also be used as a private purchase link when the product is not visible to the public (Visible from the public view = No).

Description

The description of the membership offer. This would include the details of what the membership can be used for, the frequency of the recurring payment and any terms and conditions. This will appear on your public pages.

Cost

This is where you enter the price you charge for the initial membership payment the cost entered is displayed as the price on the public booking pages. If no cost is entered, the public booking page will allow the item to be obtained for free.

Visible from Public View
'Visible from public view' determines if the item can be selected to be purchased from the public view. If it is set to 'Yes' (the default setting) the item will be visible in the public view. If it is set to 'No' the item will not be visible and will not be available for clients to purchase online.

Total Available
The total available is the total amount of this product that can be sold. Once the amount is reached the product will be displayed as sold out.

NOTE: If you do not want to limit the amount of product available set this number to a high value of 100000 or more. This amount can be changed at a later date to make more the product available.

Category
You can set categories for your Services and Products to manage the way they appear in your mini-website. This is particularly useful if you have a broad selection of offerings.

Image
You can add a product image by selecting a file to attach using the 'Browse' function.

After purchase actions
Select Membership Subscriptions to access the additional details required to set up the recurring payments.

Initial duration
Set the initial duration – The initial duration is the amount of time between the first payment and the commencement of the recurring payments.
Auto Renew
Set how many renewal Membership subscription payment will occur.
Renewal Cost
Set the cost of the subscription for the renewal payment.
Renewal Duration
Set the duration of the subscription renewal

Configuring services to accept memberships
Each service that you offer can be configured to accept a membership as a form of payment. For each service that you want a client to book and use their membership you will need to select membership.

Managing membership recurring payments

All purchased memberships are displayed on the membership subscription page and displays each subscription the charges remaining, payment details and the client the membership is linked to. Each day bookitlive processes any membership subscription that are due and sends membership payment notification to the client indicating a payment has been processed.

Failed recurring payments

If a recurring membership payment fails a payment failure notification is sent to the client with the reason why the payment failed. Except for the error message Insufficient Funds which indicates the card does not have funds to complete the payment all other payment failures will require the card details to be updated to resolve.

Insufficient Funds

If the failed payment error message indicates Insufficient Funds it generally means the card is a debit card and there is not enough money in the bank account to process the payment. As bookitlive will try to process the payment every day the issue can be resolved and payment processed once the client has topped up their funds and bookitlive attempts to process the payment the next day.

51 - Insufficient Funds - No funds available

Payment failure messages

The membership subscription page will highlight failed payment in red indicating the payment failure error message that was received when the payment was attempted.

The following failed payment error messages will require the stored payment details to be updated by you to resolve:

05 - Do not honour - Bank is unable to process the payment

31 - Bank not Supported by Switch

33 - Expired Card-Pick Up

34 - Suspected Fraud-Pick Up

36 - Restricted Card-Pick Up

41 - Lost Card-Pick Up

57 - Trans. not Permitted to Cardholder

102 - Invalid Expiry Date - Card has expired

Card has been stolen

179 - User Cancelled Payment

Resolving membership recurring payment failures

Resolving membership recurring payment failures required the store payment details to be updated for the membership with new card details. You will need to contact the client to obtain new card details so you can update the store payment for the membership.

To update the store payment and membership payment go to the membership subscription page or the client page and select the client whose payment is failing. From the store payment tab add a new store payment by entering the

new card payment details. Once saved go to the client membership tab and change the payment details to use the new stored payment that you just added.

Recording of membership subscription payments
The membership payments will be included in the purchase reports so you can see all the payment processed within a date range.

Booking restrictions using memberships

The same booking rules on how far in advance a booking can be made are applied when using membership as a form of payment except for when the recurring membership payment has failed. If a recurring membership payment has failed the client will not be able to use the membership for payment and will need to pay with another card or use a valid voucher to complete the booking. Once the recurring membership payment complete successfully the membership will be available to make future booking.

❖ Dropbox integration

Dropbox integration is used to add storage to your bookitlive account so files can be uploaded against a client record. When Dropbox is connected to your bookitlive account a **Files** tab is added for each client record.

With bookitlive's Dropbox integration, you can:

- Upload files and store against a client record from a Desktop, Laptop, Smartphone and tablet
- Upload multiple files at once
- Upload and store images, videos, documents (Word, Excel, Powerpoint), PDF and other common file formats
- Take a photo on a Smartphone/Tablet and upload to a client record in one action
- View and rename uploaded files from the client record

Connect Dropbox account

Connect Dropbox by logging into your bookitlive account and connecting Dropbox.

1. Logon to your bookitlive account
2. Browse to URL https://bookitlive.net/provider/info/filestore to attach your Dropbox account
3. Allow bookitlive to access your Dropbox account
4. Enter your Dropbox account username and password
5. Goto you bookitlive Dashboard
6. Confirm Dropbox is connected by selecting the Client tab and opening a client record, confirm that a **Files** tab is displayed

Please Note: You must have room in your Dropbox storage account in order for uploads to be successfully transferred.

4. NEXT STEPS

Training Module 2

Now that you are ready to start taking bookings, see User Guide 2: Booking Management for a guide to getting the most out of your bookitlive system.