

Your business always on

Booking Management



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1. INTRODUCTION

About this Document

This document provides an overview of everything you need to do in order to:

- Login & Logoff as a provider
- Become familiar with your dashboard
- Make a booking
- Manage scheduling and availability
- Create a report
- Manage clients

Details and information on setting up your bookitlive scheduling service can be found in User Guide 1: Setting Up Your Account. These guides are available both on the website (see the 'Help' page from your drop-down account menu) or in hardcopy form.

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 provider view
- Minimise no-shows send notifications and reminders via email, SMS text and Outlook Calendar
- 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 User Guide 1 for details.

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



2. BOOKINGS

Now that you have configured your system (see User Guide 1: Setting Up Your Account) you undoubtedly wish to start making bookings. You can make manual bookings using features on your Business Dashboard or via the Booking Sheet page. This is also where you can view and edit bookings that you have taken manually or that clients have entered via your public booking view.

Ů Login & Logout

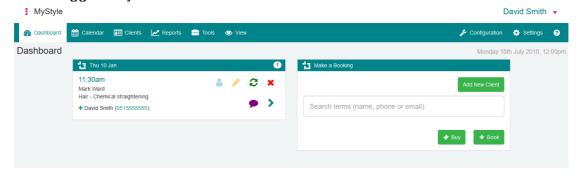
To login as a provider (Administrator/Manager/Staff Member):

- 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:

Dashboard

Once logged in your Dashboard looks like this:



Business Dashboard

Your Business Dashboard is the portal to all bookitlive features and configuration.

From this page you can:

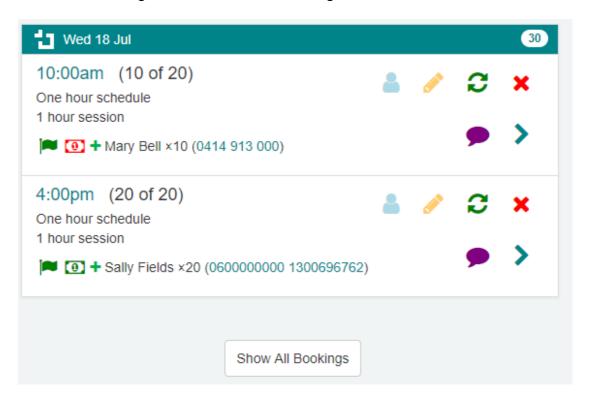


- Access Tabs & Menus for account configuration, settings, tools and client management via the main menu
- See all future bookings via 'Next Bookings'
- Take phone and walk-up bookings via 'Make a Booking'
- Access the booking sheet

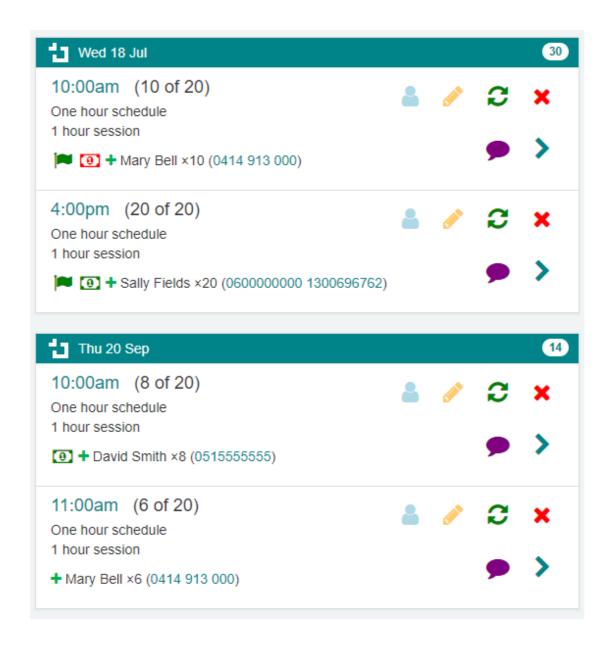


Bookings

Future bookings are visible on the left side of the Dashboard under. Selecting 'Show All Bookings' will list all future bookings.







Booking Features

A number of additional options are available from the 'Next Booking' view. By clicking on the booking icons on the right you can:

Icon	Function	Description
	Modify	Select this icon to modify a booking to a new date and time. A booking can also be modified to indicate its booking and payment status (see Status Indicators).
C	Repeat	Select this icon to transfer client details to make a another booking.
×	Cancel	A booking can be cancelled by selecting this icon.



	Go to client details	Select this icon to open the client page with the client selected. If a booking is for a group all clients in the group will be selected.
>	View/Print Booking Details	Clicking this icon opens a new page containing booking details in a print-ready format.

Next Booking Icon Functions

Status Indicators

Information on the booking status and the payment status are also shown next to the booking. Status indicators can be changed at any time for both future and past bookings through the 'Modify' booking function. The data can also be exported to an Excel (CSV file format) from the Reports page.

Booking Status Indicator

When a booking is added it is automatically set to a booking status of 'Scheduled'. The booking status can be changed by modifying the booking and changing the status to one of the following:

Booking Status	Indicator
Completed	
Did not show	im .
Outstanding	
Cancelled	i≈

Payment Status Indicator

When a booking is added it is automatically set to a payment status of unknown if no payment was taken. If a payment occurred at the time of booking the payment status will be set to 'paid'. The payment status can be changed by modifying the booking and changing the status to one of the following:

Payment Status	Indicator
Unknown	0
Paid	0
Not paid	0
Refunded	0
Forfeited	①

Availability Indicator

A number shows next to the client booking to indicate how many of that particular service/resource are booked and how many remain.

Client Notes



Click on the 'Client Notes' icon to access any additional notes about the client that were entered during booking.

Make a Booking

The 'Make a Booking' function (on the right of the screen) allows you to add new client details or edit existing client details without having to use the Client Management page. You can add or edit client details whenever you like, without having to make a booking. The 'Make a Booking' view provides all the functionality of the public booking view, including the ability to fill in forms associated with the service being booked.

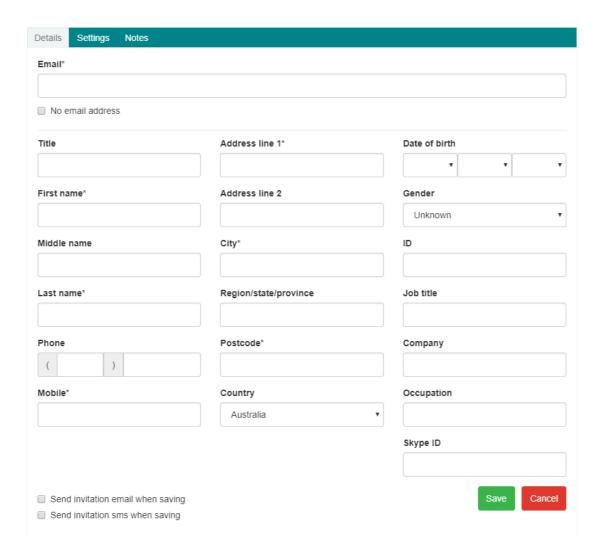
To make a booking you need to first select the client you wish to book for or create details for a new client.

Add New Client

When you click on the 'Add New Client' button a pop-up form appears ready for you to fill in the client details. In addition to taking the Client name and contact details, you can also record their date of birth, job information and Skype ID. For communication purposes you can set Email and SMS Notifications as well as sign them up to receive newsletters and special offers. You can also enter any additional Notes about the client.

NOTE: In order to have the option of setting confirmation and notification options you will first need to configure your Notification Settings (see User Guide 1: Notification Settings).





Client Details Form

Once you have completed the form you can click the 'Create Account' button. Now you'll be able to 'Select your Client' to start your booking.

NOTE: As a minimum only the mandatory fields are required to be entered.

Select a Client

When you click on the Select a Client bar a drop-down menu appears with a list of existing clients and a search box. Click on your selection and their details will appear below the bar on the screen. Now you can edit their client details or proceed to 'Make a booking'.

NOTE: Once you have over 1000 clients the "select a client" changes to search for a client similar to your client page. This occurs to reduce the amount of data loaded each time the Dashboard page is refreshed.

Edit Client Details

Clicking on 'Edit Client Details' brings up the same 'Client Details' form that appears when you create a new client (see Client Details Form).



Make Booking

When you select the green 'Make a Booking' button a new window opens with the name of your business and the name of the client. Select the service the client wishes to book from the drop-down list of your services and the description of that service will appear. A 'Location' menu will appear with the possible locations associated with the service. You can now scroll through the calendar to select a date. Available times for booking will be shown for each of the dates you select.

NOTE: In order to be able to make a booking you need to have first defined your services and location/s, assigned a resource to them (see the Configuration section in User Guide 1) and configured your available times (see Opening Hours in User Guide 1).

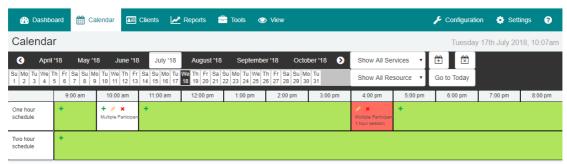
Calendar

The calendar is an alternative area where you can add and manage all your manual bookings. You can access the Calendar from the Calendar tab from your dashboard. The Calendar lists all the bookings for a particular date and the availability of each of your resources.

You can use the Calendar to:

- Add a booking or block out time by selecting a green timeslot
- Add a schedule or define non-working days via the toolbar option (see Section 3 Schedules for more information)
- Navigate to different months and days with the calendar toolbar

The Calendar can be filtered by Resource and Service to reduce the amount of data being displayed.



Calendar View



3. SCHEDULES

The booking process uses resource schedules to determine what dates and times are available to be booked. Once availability is defined the resource will be available to be booked for the scheduled times. Availability is defined using a resource fixed recurring schedule or by adding individual flexible schedules. Scheduling functions are found under the 'Tools' tab on the Dashboard Main Menu, but can also be accessed via the link in the Booking Sheet.

Schedule Types

Fixed Schedules

Business that use a fixed schedule need the ability to define time slots and days when their resources are unavailable or business is closed. A resource fixed schedule (operating hours) is used when the resource operates the same hours every week (week 1) or fortnightly (week 2). These schedules are ongoing with the availability reoccurring week after week.

Flexible Schedules

Typically flexible schedules are used for events, training courses and tours where only a small range of dates are required. Flexible schedules can also be used for casual staff that only work occasionally or to add extra time for a resource with a fixed schedule.

Businesses that only use a flexible schedule do not have to block out time as they only need to define the time they are available and all other times are then unavailable. When a resource only uses flexible schedules a schedule needs to be defined for all dates and times that they are available. All other times are unavailable.



Split Schedules

Split schedules are used in a daily schedule to cater for breaks and enforcing service start times.

NOTE: Bookings cannot be made for a resource outside of the resource operating hours unless you define a flexible schedule. (See Resources in User Guide 1 for information on setting flexible schedules).

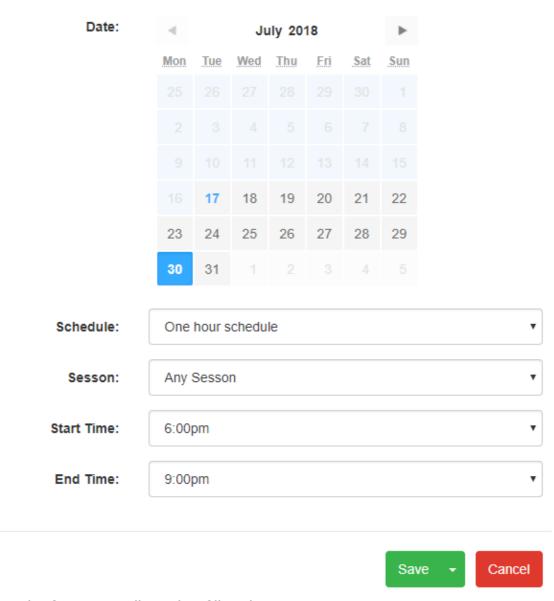


Adding Schedules

When you click on 'Add Schedule' a pop-up screen will appear as an overlay over the Calendar page. This allows you to create a new schedule for a resource at a specified date and time. The schedule will override any existing schedule unless a booking is present.

Add Once-off Schedule

This allows you to create a new schedule for a resource at a specified date and time. The schedule will override any existing schedule unless a booking is present.



On the form you will need to fill in the:

DateResource



- Service
- Start Time

• End Time

NOTE: A fixed and flexible schedule can be used together to cater for recurring and individual scheduling requirements.

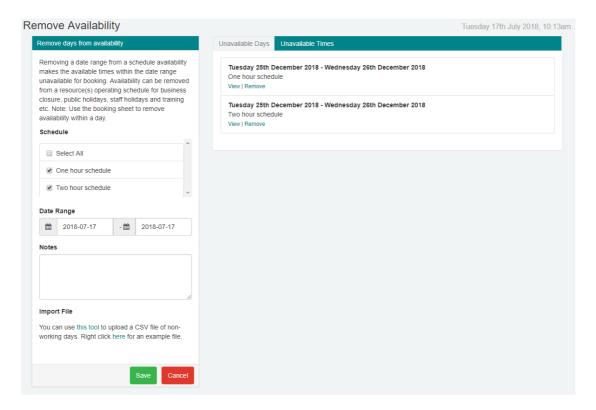


Removing availability

A Business that uses a fixed recurring schedule needs the ability to remove availability for whole days and times within a day when their resources are unavailable or the business is closed.

Removing availability

From the Tools menu select "Remove Availability" This feature is used to restrict the ability to make bookings for a full day or range of days against your fixed recurring schedule.



Removing availability

Remove availability for the following reasons:

- Your business is closed for holidays (Public holidays/Bank Holidays etc.). This restricts the ability to make bookings for the entire business.
- A resource is away for a full day or multiple days (training day, annual leave). This restricts the ability to make bookings for a particular resource.

NOTE: Removing availability does not remove any existing bookings. You need to move or cancel existing bookings to inform your customers that you are unavailable on these days.



On the form you will need to fill in the:

- Resource
- Date Range
- Notes

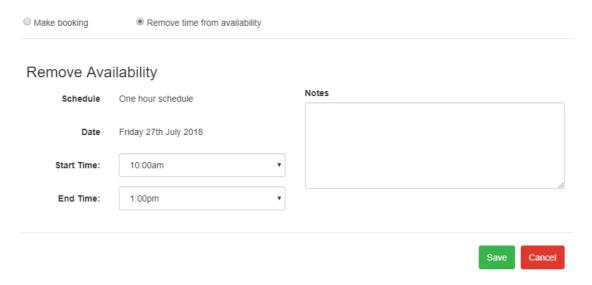
NOTE: The Remove availability page displays all the days and times where availability has been removed.

Remove available time

There will be certain times during a day when you want to restrict the ability to make bookings (make times unavailable) for a particular resource against their fixed recurring schedule.

Use 'Remove Availability' to take away time periods within a day from your fixed recurring schedules to cater for breaks and times when the resource is not available.

From the Calendar select a green time slot a pop-up screen will appear over the Calendar page.





Steps:

- 1. From the top of the screen select "Remove time from availability"
- 2. Select the start time from the drop-down menu
- 3. Select the end time from the drop-down menu
- 4. Save by clicking on the **Save** button.

Use the **Remove Availability** from the Tools menu to remove availability for a whole day or range of days.

NOTE: Removing available time can only be defined on a fixed recurring schedule.

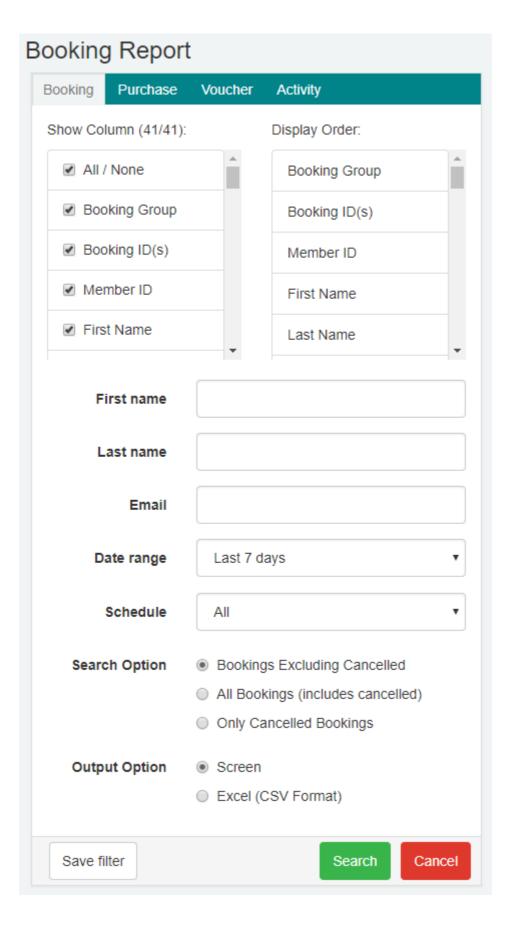


4. REPORTS

The Reports function is used to select booking details that you want to view and download to create your own reports. It is accessed via the **Reports** tab on the Main Menu. You will be able to define the booking search options for viewing and exporting booking details to a CSV file.

Creating Reports







The table below shows all the data fields that can be used in compiling booking reports. (Set your fields in **Settings - Client Preferences**).

Column Selection	Field Description	
Booking Group	Booking reference number to combine a multiple person group booking.	
Booking ID(s)	Booking reference number for each person booked	
Member ID	Bookitlive unique logon ID	
First Name*	Client's first name	
Last Name*	Client's last name	
ID*	Client ID reference	
	Client's company	
Company* Address 1*	Client's address line 1	
Address 2*		
	Client's address line 2	
City/Town*	Client's city of residence	
Region/State/Province*	Client's region or state of residence	
Postal Code*	Client's postal code	
Mobile phone*	Client's mobile phone number	
Phone*	Client's telephone number	
Email	Client's email address	
Date of birth*	Client's date of birth	
Booking Date	The date and time of the booking	
Booking Created (GMT)	The date and time in GMT the booking was created	
Booking Cancelled (GMT)	The date and time in GMT when the booking was cancelled	
Service*	The name of the service* that was booked	
Service Cost*	The current service* cost	
Booking Condition	The name of the resource* that was booked	
Booking Cost	The actual cost at the time of booking	
Resource*	The name of the resource* that was booked	
Resource Description*	The description of the resource	
Invoice	Transaction receipt payment reference	
Voucher Code	Voucher code entered at time of booking	
Security Code	Security code entered at time of booking (Used for Groupon type deals)	
Booked By	Person who made the booking	
Cancelled By	Person who cancelled the booking	
Booking Status	Currently set Booking status	
Payment Status	Currently set Payment status	



Notes	Notes entered by the provider	
Booking Notes	Client booking notes and combined custom form data	

^{*}Field labels can be changed by setting the terminology for **Settings - Terminology.**

Using Reports

There are four different types of reports you can create:

- Booking Report
- Purchase Report
- Voucher Report
- Activity Report

The same steps can be followed in making these reports. Of course, the field items in the 'Show Column' and the 'Search Options' differ according to whether it's a Booking, Purchase, Voucher or Activity Report.

Steps:

- 1. **Select the report tab** booking, purchase or voucher
- 2. **Choose columns** the column selection displays a list of fields in a box on the left-hand side. As you select them by ticking the check boxes they will appear in the box on the right-hand side in the order they will display in the report. You can use the All/None option to select or deselect columns in bulk.
- 3. **Select a Date Range** a drop-down list gives you your date range options. A custom date range can be selected via a calendar view.
- 4. **Select Search Options** the search options differ depending on which of the 3 types of reports you are creating
- 5. **Select Output Option** there are 2 different output options:
 - Screen displays output to screen
 - Excel (CSV Format) extracts data and downloads file



Creating Customised Reports

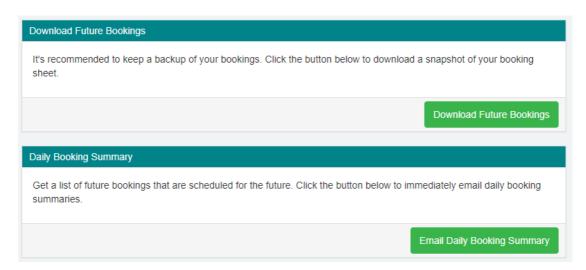
The bookitlive system provides a great opportunity for you to tailor your reports for your particular business requirements.

Once you have downloaded an Excel CSV file using the Reports Tool you can create your own reports by opening the file in Microsoft Excel. Excel can be used to filter data by resources, services or dates.

If a business has custom forms attached to their account to capture additional information at the time of booking, the data will be stored in the Form Fields, one question per field.

Offline Backups

The bookitlive software will generate a backup copy of your future bookings. Just click on **Download Future Bookings** to produce a document that can be saved on your computer. Alternatively use or **Email daily booking summary** to send your future bookings to the Administrators email.



Backing up Future Bookings

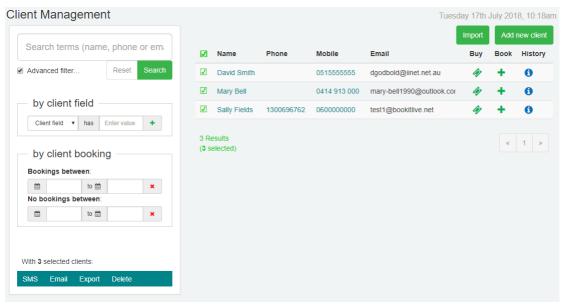


5. EI CLIENT MANAGEMENT

Client Management provides features that make your business more efficient, increase your profitability, and reduce your operational costs. Your client management page looks like this:

Benefits of maximising use of the client management features

- **Quick** Speeds up the manual booking process as you can select the client from a list and their details are automatically populated
- Easy marketing Allows you to send SMS text and email messages to a client or multiple clients to promote your business, advise of special offers or advertise your availability to attract more business
- **Simple record-keeping** Ability to export client details to other systems to build mailing lists and attract more business
- Direct client communication Encourage your clients to make online bookings by sending invites to use your online booking system



Client Management

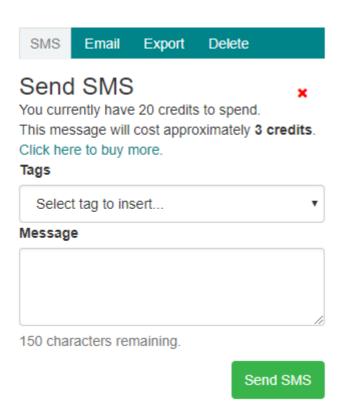
The action buttons are positioned on the left of the screen below your client search box. These features allow you to:

- Contact clients via SMS or email
- Export new client details to external file
- Delete



SMS Clients

Text messaging your clients is a quick and easy way to communicate promotions and availability to your clients. SMS text messages can be sent to one client or multiple clients.

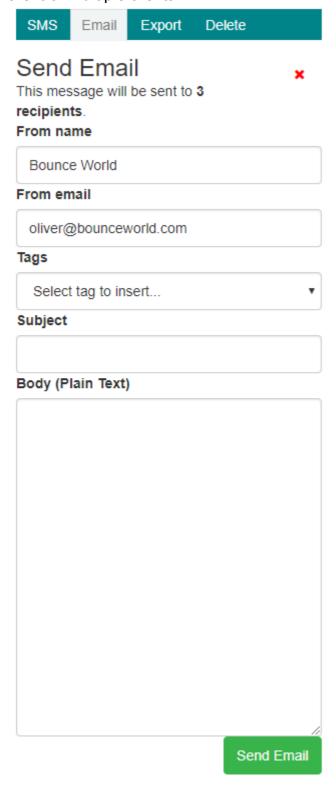


Send SMS View



Email clients

Email messaging your clients is a quick and easy way to communicate promotions and availability to your clients. Email messages can be sent to one client or multiple clients.





Export Clients

Use the Export feature to export all your client details to a file Excel file (CSV) and download the file. Open the downloaded file using a spreadsheet program like Microsoft Excel, or Open Office on a PC or Mac.

Import Clients

The import feature requires an Excel file (CSV) to be created with your client details. The file needs to be formatted as per bookitlive's standards to import correctly.

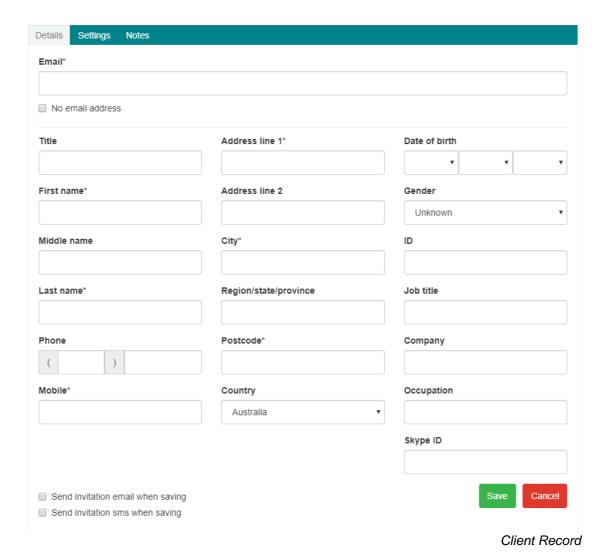
You can download an importing Excel file (CSV) template that includes an example on how to enter your client details. Alternatively contact bookitlive and we will help you with the client importing process.

Add New Client

Clicking on the 'Add New Client' button brings up the client record as on the Provider Dashboard view described in Section 2 Bookings.

In addition to taking the Client name and contact details, you can also record their date of birth, job information and Skype ID. For communication purposes you can set Email and SMS Notifications as well as sign them up to receive newsletters and special offers. You can also enter any additional Notes about the client.





NOTE: In order to have the option of setting confirmation and notification options you will first need to configure your Notification Settings (see Notification Settings in User Guide 1).

Send Invitation Requests

When you add and modify your client details you have the option to invite the client to start using your Public Booking View to make online bookings. (The default value is off). When selected the system will send an email to the client inviting them to use your online booking system. An email will be sent to the client containing their log on details. The client will now be able to make online bookings using your businesses Public Booking View.



6. VIEW

The 'View' tab on the Provider Dashboard allows you to see the booking system the way a client would see it, whether that is using a mini-website, public booking view or product purchase page.

Public Booking

Cancer Clinic

Program

Strength Clinic

The Strength Clinic is a fully-equipped strength rehabilitation facility for people with health/medical conditions, injury or disability.



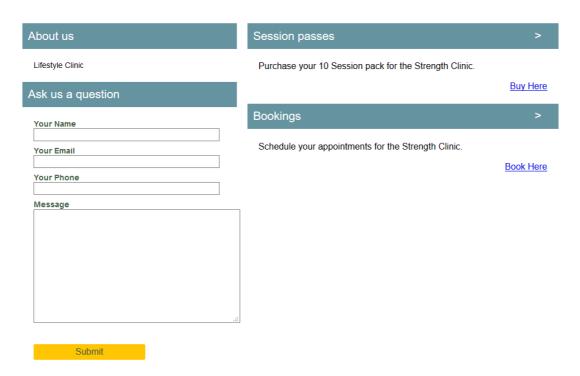
Monday, 30 July 2018			
TIME	PROGRAM	AVAILABLE	
9:00am	Strength Clinic	8	Book Now
10:00am	Strength Clinic	8	Book Now
11:00am	Strength Clinic	8	Book Now
12:00pm	Strength Clinic	8	Book Now
2:00pm	Strength Clinic	8	Book Now
3:00pm	Strength Clinic	8	Book Now
4:00pm	Strength Clinic	8	Book Now

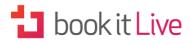


Mini Website

If you wish to add logos and business images to your mini-website see 'Account Images' under 'Settings'.

Cancer Clinic







Cancer Clinic

Session passes	Amount
Strength Clinic - 10 Session Pass (Standard) 10 Session pass for Strength Clinic sessions. Valid for 12 months from purchase.	\$155.00 Buy Now

Products View



7. ADD bookitlive to iPhone/iPad

bookitlive can be added to your Home Page on a iPhone or iPad.

- 1. On your iPhone/iPad, go to a https://bookitlive.net/ page in Safari
- 2. Tap the Add button on the bottom of your screen to open the add menu
- 3. Tap "Add to Home Screen"
- 4. Type bookitlive as the name for the icon
- 5. Tap "Add" to put it on your home screen
- 6. Access bookitlive from your home screen by tapping the bookitlive icon

8. ADDITIONAL ASSISTANCE

Now that you've finished this module and are familiar with Booking Management you can take advantage of all the benefits offered by the bookitlive online booking software.



For more information and help see the bookitlive **Help Centre** by selecting the in your dashboard or browsing to https://help.bookitlive.net

You can ask question or raise support tickets from the Help Centre.