

BizDiary **Customer Module Guide**

Table of Contents

About this Guide.....	2
Using this document.....	2
Further Reading.....	2
Introduction.....	3
Features.....	3
Help and Hints.....	3
Security.....	3
Customer Module is an optional extra.....	3
About the Customer Module.....	4
Customer Access.....	4
Setting Up the Customer Module.....	5
Customer Module Settings.....	5
Main Settings.....	7
Smart Booking.....	8
What is Smart Booking?.....	8
Do I need to use it?.....	8
Should I use it on Personnel or Location or both?.....	8
How does it work?.....	8
Are there limitations?.....	9
Services, Locations, and Personnel.....	10
Services.....	10
Locations.....	11
Personnel.....	12
Important Notes about Hours and Services.....	12
Managing Customer Access.....	13
Giving a Customer access.....	13
Removing Customer access.....	13
Resetting a Customer's Password.....	14
Passwords.....	14
Existing Customer self-registration.....	14
New Customer Registration.....	14
Website Integration.....	15
No Website.....	15
Domain Name redirect.....	15
Link to Welcome Page.....	15
Individual links.....	16
Using URL hiding.....	16
Appearance.....	16
Other considerations.....	17
Information should be consistent, accurate and up-to-date.....	17
Scheduled Breaks.....	17
Stay on top of Appointments.....	17
Appendix A: Using HTML in Custom Text.....	18
Bold, Italic and Underline.....	18
Anchors / Links.....	19
Other Tags.....	19
Checking Your Work.....	19

About this Guide

The Customer Module Guide provides details on how to set up your system to get the most out of the Customer Module.

Topics include setting up the Customer Module to suit your business needs, managing users, and integrating the Customer Module with your website.

Using this document

The document is presented in such a way that you can easily skim over the parts that seem obvious to you, and still find plenty of detail when you need it.

Before setting up the Customer Module, it is important that you understand the general use and administration of BizDiary. Please read the other guides as listed in the [Further Reading](#) section.

In particular you should have already created the basic Services, Locations and Personnel as detailed in the [BizDiary Administrator Guide](#).

Further Reading

The [BizDiary Administrator Guide](#) provides details on how to set up your account. It includes detailed instructions to help you set up Services, Locations, Personnel and Users. It also provides information on how to customise the system to your needs, including features such as the appearance and applying a custom logo. It also includes details for using the Trial Account Wizard and other account maintenance features such as upgrading the account, purchasing SMS credits and cancelling the account.

The [BizDiary User Guide](#) provides further information on the day-to-day use of BizDiary. It includes instructions on booking and managing appointments and customer details. It also covers other subjects such as sending SMS messages and emails.

Introduction

BizDiary is a web-based system that helps you organise your appointments and other day-to-day tasks and events.

The **Customer Module** is an extension to BizDiary which allows customers to make their own appointments. Customers can also cancel appointments according to policies defined in the Customer Module set-up.

Features

The Customer Module includes these features...

- Registered customers can book appointments **7 days a week, 24 hours a day**, from anywhere they have access to the internet.
- Detailed lists of Personnel, Services and Locations.
- Information on Personnel, including profile pictures.
- Highly customisable.
- Custom terms of service and cancellation policy.
- Customers can view past and upcoming appointments.
- Customers can cancel future appointments.
- New customers can register on-line.

The system is compatible with Firefox (v.2 or above), Internet Explorer (v.6 or above) and Safari.

Help and Hints

As with the main BizDiary system, the Customer Module has **intelligent context-sensitive help** available, with links to other relevant topics and an easy to access Contents page.

The Customer Module help is separate from the main BizDiary help, so that customers are not shown any details relating to BizDiary usage.

Security

Customers only have access to their own appointments. The Customer Module is essentially a separate system, and customers cannot access any other features of BizDiary outside of the Customer Module.

Customer Module is an optional extra

The Customer Module is an optional extra for BizDiary. Special features relating to the Customer Module will only appear in your system if the Customer Module has been enabled for your account. If you are not seeing the menu items and form tabs mentioned in this document, it may mean that the Customer Module is not enabled for your account.

About the Customer Module

The Customer Module gives customers the ability to book, view and cancel their appointments.

The customer module includes...

- Welcome page:** The welcome page shows the business name and contact details, a customisable welcome message, and provides links to the login screen, existing customer registration, and new customer registration.
- I also shows lists of Locations, Services and Personnel.
- Log-in screen:** The log-in screen allows a customer to enter their user name and password to access the system.
- A *forgot your password?* link also allows them to reset their password.
- Register existing customer:** The existing customer registration screen allows an existing customer to register by providing their email address and choosing a user name.
- New Customer Wizard:** The New Customer Wizard allows a new customer to register for the Customer Module.
- Customer Module:** Once logged in a user has access to the main customer module features, including...
- Book appointment
 - View appointments (includes cancellation)
 - Show policies
 - Change password
 - Log-out
- Lists of Locations, Services and Personnel are also shown.

Customer Access

When you signed up for the Customer Module you should have been sent an email with a link to the Customer Module for your business.

The link will look something like...

`http://my.bizdiary.com.au/cpage.php?c=BusinessCode`

Where "BusinessCode" is the code that you assigned to your account. If you are not sure what this code is or need us to change it please contact us.

There are also similar links that will take a user straight to the log-in screen, and registration screens.

For more details on these links and how to integrate them into your website see Website Integration (page 15).

Setting Up the Customer Module

Customer Module Settings

To access the settings for the Customer Module, select **Account > Customer Module** from the menu.

The available settings are...

Customer Module Settings

- Active:** Allows you to turn access to the Customer Module features on and off.
When turned off then any attempt to access the customer module displays a warning message.
- Smart Booking:** Smart Booking optimises available appointment times in the Customer Module to avoid unusable gaps. You can optimise for the Personnel or the Location, or both.
See the Smart Booking section for further details.

Who can register...?

Existing Customers: Customers who are already in the system, but have not been assigned a user name and password can self-register.

For this to be allowed the customer must have a valid email address in the system.

New Customers: Allow new customers to register. New customers enter their name and contact details and a valid email address. Registration can only be completed by accessing the email sent to the assigned address.

Booking/Cancellation

Hrs before Appt: Number of hours before an appointment that a customer may make a booking.
E.g. If set to 48, then customers cannot book appointments less than 48 hours in advance.

Hrs before Cancel : Number of hours before an appointment that a customer may cancel a booking
Cancellations are still allowed after this time, but the Customer is told they have breached the cancellation policy.

Confirmation messages

Reception copy: If enabled, a copy of each customer booking confirmation will be sent to the reception email.

Personnel copy: If enabled, a copy of each customer booking confirmation will be sent to the associated personnel's email.

Cancellation messages

Reception copy: If enabled, a copy of each customer booking cancellation will be sent to the reception email.

Personnel copy: If enabled, a copy of each customer booking cancellation will be sent to the associated personnel's email.

Pages

Hide 1 Service If there is only one Service, then hide the Services page.

Hide 1 Location If there is only one Location, then hide the Locations page.

Hide 1 Personnel If there is only one Personnel, then hide the Personnel page.

Hide Locations Hide the Locations page. The customer will not get to choose the Location at this point, but will be offered appointments at all Locations.

Hide Personnel Hide the Personnel page. The customer will not get to choose the Personnel at this point, but will be offered appointments with all Personnel.

Include booking notes Include the Booking Notes page, where the customer can add a message.

Custom Text

Introduction: An introduction that is shown on the main page of the customer booking module.

This can be used to welcome your customers and highlight the services offered by your business. If left blank then a standard welcome message is used.

Plain text, as well as basic HTML can be used.

Terms/Conds: Terms and conditions that are shown at the end of the appointment booking process, and also on the **Our Policies** page of the Customer Module.

Plain text, as well as basic HTML can be used.

Cancellation: The cancellation policy is shown at the end of the appointment booking process, and when a customer attempts to cancel an appointment.

The cancellation policy is also shown on the **Our Policies** page of the Customer Module.

Plain text, as well as basic HTML can be used.

Notes Info: Message shown to customer if the Booking Notes field is used.

Plain text, as well as basic HTML can be used.

Using HTML in Custom Text

The **introduction**, **terms and conditions**, and **cancellation policy** can all be written as plain text and will appear just as you type them.

Sometimes you may want to highlight a particular word by making it **bold**, *italic*, or underlined.

Such formatting of the text can be done relatively easily by adding simple HTML tags.

A simple tutorial on how to use some simple HTML can be found in [Appendix A: Using HTML in Custom Text](#).

Main Settings

The following account settings (found under Account > Settings) are also relevant to the Customer Module...

Reception email: Email address for reception. Emails to customers will come from this email address, and if enabled customer booking confirmations and cancellations will be sent to this address.

Smart Booking

What is Smart Booking?

The **Smart Booking** feature works by looking at available times in the calendar, and comparing these with the duration of available services. It then ensures that only appropriate appointment times are offered to the customer.

Do I need to use it?

If you are using the Customer Module, and have a very simple set up such as 30 minute appointments, and a 30 minute block size, then there is no need to turn on Smart Booking, and doing so will create a very small increase in the time taken for BizDiary to determine appointment times.

If you have a more complex set of service lengths, and the Customer Module is offering appointment times that create unusable gaps in your Calendar, then turning it on will help eliminate these gaps.

Should I use it on Personnel or Location or both?

When choosing appointment times, Smart Booking looks at the duration of Services. It can either look at the Services that belong to a Personnel or to those that belong to the Location, or a combination of both.

For most purposes you only want to use the Services specific to the Personnel. If you have a very complex schedule where multiple Personnel share the same room, on the same day it may be necessary to also use Location Services, but doing so can limit Smart Booking's ability to determine sensible appointment times.

You set which you want to use in the Customer Module settings..

How does it work?

The easiest way to understand Smart Booking is to look at a common example...

Danielle provides 1 hour appointments. Her typical day starts at 8:30am, she has a half-hour lunch break from 12:30-1pm, and finishes at 4pm. Because she needs to start appointments on both the hour and half-hour her Calendar block size is set to 30 minutes.

Without Smart Booking turned on, the Customer Module would offer appointments at 8:30, 9:00, 9:30, 10:00, and so on.

With Smart Booking enabled, the Customer Module recognises that Danielle's appointments are 1 hour long and so only allows 8:30, 9:30, 10:30, and 11:30, and then 1pm, 2pm, and 3pm in the afternoon.

Are there limitations?

As with any system, Smart Booking can only work with the information it has available. Let's look at another simple example to clarify this...

David also provides 1 hour appointments, and uses a 30 minute block size. On Monday he already has some appointments and events, but still has appointment times available between 9am and 11:30am.

You've probably already spotted the problem here.

When a customer goes to book, they will be offered the following times... 9:00, 9:30, 10:00, 10:30!

That looks like it could create a gap - in fact it definitely will, because there is 2.5 hours available, but you can only ever use 2 hours.

Smart Booking is working correctly here.

If someone books the slot at 9-10am, then the next customer can either have 10am or 10:30.

If instead they book the slot at 9:30-10:30am, then the next customer can only have 10:30.

No matter which way you do it, there has to be a 30 minute gap somewhere, and Smart Booking is allowing for that.

Services, Locations, and Personnel

Lists of services, locations and personnel are shown in the Customer Module. Because these details are now going to be shown to your customers it is worth taking some time to ensure that the details are accurate and meaningful.

Each Service, Location and Personnel can be hidden from view in the Customer Module.

Services

Details such as the name and description of the service are shown along with duration and cost.

- Name:** Choose a short, but meaningful name for the service.
- Description:** Provide a description of the service.
The description is optional.
- Duration:** The duration of the service in minutes.
Although you can change appointment durations in BizDiary, this value cannot be changed by a customer. If you have similar services that go for different times you should create each one as a separate service.
For example: "Massage 1/2 hr" and "Massage 1 hr".
- In Cust Mod:** Whether this service is available in the Customer Module.
This gives you the option to have certain services which are available in BizDiary, but do not show up in the Customer Module.
- Cost:** The cost of the service.
This is a text field, and is for display purposes only (BizDiary does not handle billing).
You may want to enter a specific amount (e.g. \$75) or a range (e.g. \$65-\$90).

Locations

Details such as the name and description of the location are shown along with opening hours and services provided.

Group: When multiple locations have the same group they appear as a single location in the Customer Module. This is a useful feature to enable you to group together multiple rooms and present them as a single location, perhaps by suburb.

For example:

Group: Gordon **Name:** Gordon Rm 1

Group: Gordon **Name:** Gordon Rm 2

Name: Choose a short, but meaningful name for the location.

Description: Provide a description of the location. In most cases this will simply be the street address of the location.

If using grouped locations then the longest description in the group is used. This allows you to simply provide a description on any one of the locations in the group whilst leaving the others blank.

Hours: When using the customer module it is important to accurately list your opening hours.

If using grouped locations the system will automatically combine all of the opening hours for the locations in the group.

Services: Be sure to accurately list the services available at this location.

These services are also used for the main BizDiary system. Even if you choose a service that is otherwise excluded from the Customer Module it will not be listed under this location when viewed in the Customer Module.

In Cust Mod: Whether this location is available in the Customer Module.

This gives you the option to have certain location which are available in BizDiary, but do not show up in the Customer Module.

Personnel

Details such as the name, job-title and description are shown along with availability and services provided. A profile photo can also be shown.

- First name/Last name:** The person's full name is shown.
- Availability:** When using the customer module it is important to accurately list your availability.
- Services:** Be sure to accurately list the services available from this person.

These services are also used for the main BizDiary system. Even if you choose a service that is otherwise excluded from the Customer Module it will not be listed under this personnel when viewed in the Customer Module.
- In Cust Mod:** Whether this personnel is available in the Customer Module.

This gives you the option to have certain personnel who are available in BizDiary, but do not show up in the Customer Module.
- Job title:** This is shown alongside the person's name in the Customer Module (optional).
- Description:** The description can be used to provide information about the person. It may include details such as qualifications and accreditations.
- Picture:** A small profile picture can be shown for each person. Click the [Browse] button and then select a file. Images should be in JPEG, GIF or PNG format, and should be no more than 80 x 80 pixels.

Important Notes about Hours and Services

The Customer Module attempts to find an appointment time that will suit the customer for their desired service. To do this it needs accurate and consistent information.

Firstly the customer is asked what service they require. Once selected the system looks at which locations offer that service and asks the customer to choose from the available locations. Then the system determines which personnel can provide that service at the specified locations.

If the information is not consistent the customer may get a message saying "There are no Personnel who provide that Service at the selected Location(s)".

Also the Availability of Personnel needs to be consistent with Location Hours.

Here are some tips to ensure consistency...

- Make sure that for every Service offered at a Location there is at least one Personnel who provides that Service at that Location.
- Make sure that for every Service offered by a Personnel there is at least one Location where that Personnel works that offers that Service.
- Make sure that each Personnel's Availability is consistent with the Hours of the respective Locations.

Managing Customer Access

There are three ways that a customer can get access to the Customer Module.

1. You give them access by editing their record in BizDiary.
2. They are an existing customer (in BizDiary) and register using their email address.
3. They are a new customer and sign-up using a valid email address.

Options 2 and 3 can be turned off as detailed in [Customer Module Settings](#).

Giving a Customer access

To give an existing customer access to the Customer Module...

Step 1: Locate the Customer (by Searching or Browsing) and **edit** the Customer record.

Step 2: Select the **Customer Mod.** tab.

Step 3: Change **On-line** to **Active**.

When you do this the **Reset password?** is automatically set on, and a sample **User name** is created based on the customer's name or code.

Step 4: The **Reset password?** causes an email to be sent to the customer with details of how to complete their sign-up. When you are setting up a customer for on-line access for the first time you normally want this to be on.

Step 5: Either accept the sample **User name** or create one of your own choosing. When you save the system will ensure that the user name has not already been used.

Step 6: Click [**Save**] to save your changes.

When you click [**Save**] the system checks that all required fields have been entered. If **Reset Password** was set then an email is sent to the customer which allows them to log into the system and create their password.

Removing Customer access

If you want to remove access to the Customer Module...

Step 1: Locate the Customer (by Searching or Browsing) and **edit** the Customer record.

Step 2: Select the **Customer Mod.** tab.

Step 3: Change **On-line** to **Inactive**.

Step 4: Click [**Save**] to save your changes.

Resetting a Customer's Password

If the customer has forgotten their password, they may contact you and ask for their password. The system does not allow you access to customer passwords.

The customer can either use the *forgotten password* link on the log-in screen, or you can reset their password for them. To reset their password.....

- Step 1:** Locate the Customer (by Searching or Browsing) and **edit** the Customer record.
- Step 2:** Select the **Customer Mod.** tab.
- Step 3:** Check the **Reset password?** box.
- Step 4:** Click **[Save]** to save your changes.

When you click **[Save]** the system sends an email to the customer with details of how to reset their password.

Passwords

You will notice that there is nowhere in the system that allows you to change the customer's password. This is part of the security features. Passwords can only be reset either by using the *forgotten password* link or as detailed in the previous section.

Existing Customer self-registration

If allowed by the [Customer Module Settings](#), existing customers can register themselves for access to the Customer Module.

The customer selects the [Let me register using my email address](#) link from welcome page, and then enters their email address and selects a user name.

For self-registration, the customer records must already exist in BizDiary and must include the email address EXACTLY as specified.

Once completed the user is sent an email address that allows them to log in and select a new password.

New Customer Registration

If allowed by the [Customer Module Settings](#), new customers can register themselves for access to the Customer Module.

New customers complete the New Customer Wizard which asks for name, email address, contact details, a user name, and preferences. It also requires them to read and agree to a set of terms and conditions (customisable).

Once completed the user is sent an email address that allows them to log in and select a new password.

Website Integration

For most businesses using the Customer Module, the obvious point of entry for your customers will be your own website.

There are several options, depending on the degree of integration desired.

No Website

If you do not have a website (or even a domain), you can treat the Welcome page as a very simplified version of a website.

You might want to place a link on promotional material etc, to...

```
http://my.bizdiary.com.au/BusinessCode
```

Where "BusinessCode" is the code that you assigned to your account. If you are not sure what this code is or need us to change it please contact us.

Domain Name redirect

Domain names can be purchased quite cheaply these days, and most domain registrars will allow you to redirect to a specific URL for free. This can be a very cost-effective way of providing a simple website name for your customers without the expense of creating a website.

Once you have purchased your domain name, log in to your domain account and set up the redirect to...

```
http://my.bizdiary.com.au/cpage.php?c=BusinessCode
```

Where "BusinessCode" is the code that you assigned to your account. If you are not sure what this code is or need us to change it please contact us.

Link to Welcome Page

With your own website, the simplest option is to provide a link to the Welcome Page.

When you signed up for the Customer Module you should have been sent an email with a link to the Customer Module for your business.

The link will look something like...

```
http://my.bizdiary.com.au/cpage.php?c=BusinessCode
```

Where "BusinessCode" is the code that you assigned to your account. If you are not sure what this code is or need us to change it please contact us.

Individual links

If you decide you do not want to use the Welcome Page, you can provide links directly to the log-in page and optionally the customer registration screens.

The link for the **log-in** screen is...

```
http://my.bizdiary.com.au/logincust.php?c=BusinessCode
```

The link for the **existing customer registration** is...

```
http://my.bizdiary.com.au/regcust.php?c=BusinessCode
```

The link for the **New Customer Wizard** screen is...

```
http://my.bizdiary.com.au/signcust.php?c=BusinessCode
```

For all of the above, "BusinessCode" is the code that you assigned to your account. You can view and edit your Business Code by going to **Account > Details**. Be careful of making changes to the Business Code as this will change your login URL also!

Using URL hiding

If you want to make the Customer Module appear to be part of your website then one technique available is called "URL hiding".

The idea is to have a page on your site that displays the Welcome Page (or any other page) within a frame. This makes it appear to the user as if the page is part of your website.

Here is a simple HTML example...

```
<html>
<frameset rows="100%,*">
<frame name="BizDiary_CM" src="http://my.bizdiary.com.au/cpage.php?c=BusinessCode">
</frameset>
</html>
```

If you choose to use URL hiding, we recommend that you allow the enclosed page to take up the full frame.

Appearance

To make the Customer Module appear more like part of your website it is worthwhile taking the time to upload a custom logo and to modify the color scheme used by BizDiary.

These topics are discussed in detail in the [BizDiary Administrator Guide](#).

Other considerations

Information should be consistent, accurate and up-to-date

Once you open up your appointment book to your customers you will want to be sure that all customer-accessible information, especially Services, Locations and Personnel is consistent, accurate and up-to-date.

Scheduled Breaks

You should also consider the implications of allowing customers to make their own appointments. For example you may have instructed your receptionist to be sure that everyone always has at least an hour break for lunch every day, but if you do not actively block off these times customers end up booking appointments where you expected a lunch break.

For fixed lunch breaks, you can set specific break times in the Availability of the person.

If you want more flexible breaks you can block off lunch-breaks as events on individual days. A quick and easy way to do this is to create the lunch break once and then copy and paste it repeatedly, or use a recurring event.

Stay on top of Appointments

Allowing customers to make their own appointments can be a real time-saver, but it is important that you make sure you are aware of your upcoming appointments. As well as checking your schedule prior to the start of each day, you can also help yourself to stay informed by configuring the system to send copies of appointment confirmations and cancellations directly to your email.

Appendix A: Using HTML in Custom Text

The custom text that is used for such things as the cancellation policy can be written either as plain text, or can include some basic HTML features. This tutorial gives some simple examples.

HTML is a mark-up language. What this means in ordinary English is that it uses special sequences of characters to define formatting. These special sequences of characters are called tags.

Most tags come in pairs. One to mark the start of the formatting and one to mark the end.

Bold, Italic and Underline

For example, the tags used to make something **bold** are `` and ``. The `` turns bolding on, and the `` turns it off. Notice the slash character, this indicates that this is an end tag.

So if you were to put a line in your cancellation policy that said...

```
We require <b>24 hours</b> notice of any cancellation.
```

This would appear as...

```
We require 24 hours notice of any cancellation.
```

Other simple tags you might find useful are `<i>` and `</i>` for italics, and `<u>` and `</u>` for underlining.

You can also combine tags, but if you do it is important to **nest** the tags. In other words you must close the most recent tag before any other tags which preceded it.

Example...

```
Please try to be <i>on time</i> for your appointments. If you fail to arrive for your appointment we may charge you for the <b><u>full cost</u></b> of the appointment.
```

This would appear as...

```
Please try to be on time for your appointments. If you fail to arrive for your appointment we may charge you for the full cost of the appointment.
```

Anchors / Links

Another very useful, but somewhat more complicated tag that may be of use is the **anchor** tag. This can be useful to allow a customer to jump to another web page, for example a page on your website which has detailed policy information. Anchor tags are more complicated than simple bolding etc, so we suggest that you take special care if using them.

Let's say your website is called *example.com* and you have a page called *policies.html*, which you want to link to as part of your custom Terms and Conditions. Here is an example of what you might put...

```
For full details of our Terms and Conditions please read the
<a href="http://www.example.com/policies.html" target="_blank">policies
page</a> on our website.
```

Which will appear as...

```
For full details of our Terms and Conditions please read the policies page
on our website.
```

Here is a breakdown of the anchor tag from this example...

<a	The start of the anchor tag.
href="..."	The href attribute identifies the new location that this link will go to.
target="_blank"	This special tag tells the browser to open a new window. (This is recommended so that when the user is finished they can simply close the window to return to the customer module).
>	The end of the anchor tag.
policies page	The text that will appear.
	The closing anchor tag.

Other Tags

There are many other tags in HTML that can be used for all sorts of purposes. For more details you can check out on-line tutorials and other sources.

Checking Your Work

It can be very easy to miss a closing tag or to make other mistakes in your HTML. We strongly recommend that after any changes you log in to the Customer Module to view the text.