BizDiary
Administrator Guide

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About this Guide

This 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.

The Administrator Guide 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.

This manual is important reading for the person or persons responsible for setting up BizDiary.

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.

The **On-line Help** will be able to answer many of your questions, but for more detailed answers you may need to refer to this manual, or the other guides as listed in the **Further Reading** section.

The manual provides a wealth of information on the system. Even if you have used similar systems before, we strongly recommend that you take the time to go through the **Setting up your BizDiary** chapter when you are starting out.

Further Reading

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.

Information on the optional **Customer Module** is in a separate guide, the BizDiary Customer Module Guide.

Introduction

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

Getting Started

We have made it as easy as possible for you to come on-board with BizDiary, by providing **real live demo accounts**, and a **free 30-day trial** to get you up and running. From there it is a very smooth transition to a paid account – And all of your data is retained.

Demo

The demo system gives you a good look at the features of BizDiary. The only limitation imposed is that changes are not saved and SMS messages and emails don't get sent. Apart from that you should be able to get a clear idea of the features provided, to allow you to evaluate BizDiary and whether it is the right fit for your business.

30-Day Free Trial

If you like what you see, then it's time to sign up for a free, no obligation 30-day trial. This is the real deal. You set up an actual account. No credit card or payment of any kind is required.

You can find the link for the BizDiary Trial Sign-up Wizard on our website. The wizard guides you through the sign-up process.

Just fill in a few details about your business and you can start using the system straight away. No waiting around for someone to send you an unlock codes or any other nonsense. You create your own account, and within a few minutes the system will automatically send you an activation email.

Once you are logged in you can customise the system to suit your business, and immediately begin taking appointments.

Paid Accounts

We know you are going to love what BizDiary is doing for your business, and will want to sign up for one of our inexpensive monthly accounts. At any time during the trial (or shortly after) you can switch to a paid account. All your settings, customers and appointments are kept.

Again we've made the process as simple as possible. From your trial account you go to the **sign-up** link and pay for your first month. Payments are processed by PayPal.

Using BizDiary

For more details on using BizDiary, including key concepts you should refer to the <u>BizDiary User Guide</u>.

In particular you should read the **Becoming Familiar with BizDiary** section.

On-line Help

BizDiary has an extensive on-line help system. The help is **context-sensitive**, meaning that it knows which page you are currently on in the system.

Navigating the Help

The title-bar at the top of the Help window, includes buttons for navigating the help system.

The **[contents]** button takes you to the **Table of Contents** which has links to the most common pages in the help.

The **[<]** and **[>]** buttons are used to go back and forth between the topics you have visited.
This is very useful if you want more detail on something to then return to the main topic.

The **[close]** button closes the help window.

Step-by-Step Guides

The help includes a large number of Step-by-Step Guides that will guide you through many of the common tasks that you will encounter when using BizDiary.

These guides will appear in the appropriate place when you click Help. For example, clicking **Help** when booking an appointment will open the **Booking an Appointment** guide.

The step-by-step guides can also be accessed from the **List of Guides** link on the **Table of Contents** page.

Links

You can also find additional information by clicking on links within the help. These links are highlighted.

Many of the pages include a short list of the most relevant pages, listed as "*See also...*".

Hints

Hints are useful pieces of information that pop-up when you hover over a field label or a button.

These are very useful when starting out with BizDiary, but you may want to switch them off once you are familiar with the system. To turn Hints on or off, check or uncheck the **Show hints** check-box in the **Toolbox** menu.

Support

If you have a problem with the system, such as an error, you should fill in the built in Support Form as detailed in **Appendix A: Support**. By using the support form, the system can automatically access diagnostic information that will assist our support staff in resolving your problem as quickly as possible.

Setting up your BizDiary

Before taking appointments you will need to set up BizDiary to suit your business needs.

Setting up the system requires the following steps...

- **Logging in** (using the **admin** account sent to you when you signed up).

- Adjusting **Settings** according to your preferences.

- Setting up the **Services** that you offer to customers.

- Setting up **Locations** where you do business, including opening hours.

- Adding **Personnel**, who will provide Services.

- Creating additional **User** accounts as needed.

- Adding existing **Customer** information.

- You may also wish to customise some of the codes used for Event Types, Customer Status, etc.

Step 1: Log in as the Administrator

The administrator user, **admin** is used to perform the set-up of your system.

When you signed up for BizDiary you were sent the **admin** account password.

We strongly recommend that you change this password when you first log in.

Step 2: Adjust Settings

Settings affect the operation and appearance of the system, including date and time settings, SMS templates and reminders, Email templates and reminders, and themes and colors.

The following subsections each deal with a single page of the Settings form. If you prefer you can make modifications to all the pages before clicking the **[Save]** button.

Step 2a: General Settings

The General Settings include block size, date and time settings, and name order.

Follow these simple steps for managing your **General Settings**...

Step 1:   Click on **Account** and select **Settings**.

Step 2:   Set the **calendar block size**.

All appointments and events must be a multiple of this number of minutes, and start on that boundary. Common values are 15, 30 or 60.

Step 3:   Set the **time format** for how times are **displayed**. Times can be entered in either format.

Step 4:   Set your preferred **date order**.

This affects **both display and input**. The system must know when you enter a date (e.g. 3/12/2008) which is the day and which is the month.

Step 5:   Set your preferred **date separator**.

Affects the way dates are **displayed**. You can still use other separators when entering dates.

Step 6:   If you want the *possibility* to schedule appointments and events outside of normal working hours, then check the **Menu outside hours** box.

Step 7:   Select the number of previous and future appointments to show in the appointment summary.

Step 8:   Enter the email for **reception** and choose the **appointment notifications** that the receptionist will receive.

Step 9:   Set your desired **session timeout** (minutes). After this period of inactivity the session expires, and the user must log-in again.

Step 10:   Check or uncheck the **use formal names** box.

Formal names put the Last Name first (e.g "Johnson, Mary"). Informal put the First Name first (e.g. "Mary Johnson").

Step 11:   Choose whether or not to **Require customer phone numbers**.

Step 12:   Check or uncheck the **Workdays for reminders** boxes.

These are used when sending automatic reminders to customers.

Step 13:   Recheck all the values on the form and then click the **[Save]** button.

Step 2b: SMS Settings

BizDiary has built in SMS messaging. Appointment reminders can either be sent manually, or set up to be sent automatically.

Follow these simple steps for managing your **SMS Settings**...

Step 1:   Click on **Account** and select **Settings**.

Step 2:   Click on the **SMS Settings** tab.

Step 3:   Set the **SMS Sender**.

The Sender can either be a phone number (up to 16 digits) OR a text Id (up to 11 letters/numbers, no spaces or punctuation).

This shows up on the phone receiving the SMS. It is recommended to use a short version of your business name, unless you want people to be able to reply to a specific mobile number.

Step 4:   Create an **SMS template**.

The template is used to build an appointment reminder, and can include a number of template macros.

(See **Appendix F: Template Macros**).

Step 5:   To enable automatic SMS reminders, tick the **Auto-remind** box.

If enabled you also need to set **Days Before** and **Reminders From** and **To**.

Step 6:   Choose your settings for **SMS replies**.

When using SMS replies the Sender Id is NOT used, messages will appear to come from one of our provider's mobile numbers.

Step 7:   Set the **Low SMS level.** A reminder will be sent when your SMS credits are getting low.

Step 8:   Recheck all the values on the form and then click the **[Save]** button.

(For more details see **Automatic Reminders**).

Step 2c: Email Settings

As well as SMS messaging the system also has integrated email messaging. Appointment reminders can by email either manually, or set up to be sent automatically.

Follow these simple steps for managing your **Email Settings**...

Step 1:   Click on **Account** and select **Settings**.

Step 2:   Click on the **Email Settings** tab.

Step 3:   Set the **Sender Email**.

The Sender Email is the default email address that emails will be sent from.

For ad-hoc emails you can choose at the time whether to use this address or the email address associated with the current user.

Step 4:   Create an **Email template**.

The template is used to build an appointment reminder, and can include a number of template macros.

(See **Appendix F: Template Macros**).

Step 5:   To enable automatic Email reminders, tick the **Email Appt. Reminder** box.

If enabled you also need to set the **From time** and **To time**, and the **Days Before**.

(For more details see **Automatic Reminders**).

Step 6:   Recheck all the values on the form and then click the **[Save]** button.

Step 2d: Defaults

You can adjust some of the common default settings for addresses and reports.
In general these settings can still be overridden later.

Follow these steps for adjusting report settings...

Step 1:   Click on **Account** and select **Settings**.

Step 2:   Click on the **Defaults** tab.

Step 3:   Select the default **Country**, **State**, and **Timezone**.

Step 4:   Select the default **Paper size**.

              Either tick or clear the **Include country** check-box.

Step 5:   The Country field is listed in various reports, e.g. in Customer addresses. For businesses
              operating in a single country we recommend turning this off by default.

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

Step 2d: Receipts

You can customise various parts of the receipts.

Follow these steps for adjusting receipts settings...

Step 1:	Click on **Account** and select **Settings**.
Step 2:	Click on the **Receipts** tab.
Step 3:	Enter a **title** to appear at the top of the receipt. E.g. "TAX INVOICE".
Step 4:	Enter your **business #**, such as an ABN. Include a label to identify the type of number if appropriate. E.g. "ABN:12345678".
Step 5:	You can also include **Address** details to show in the receipt header. If not set, then your account address details are used.
Step 6:	Enter or adjust the parts of the **Receipt number**. **Prefix** appears before the number, **Suffix** appears after, and **# Digits** is how many digits to include. For example if your receipts look like "DG-000195-Z", you would set prefix to "DG-", suffix to "-Z" and # digits to "6". You can also change the **Next #** but be very careful not to create a number that will overlap existing receipts.
Step 7:	Set a tax rate for use on receipts. If set to 0, then no tax information will be shown on receipts.
Step 8:	You can also include additional **Info**. This appears towards the bottom of the invoice. Use this to include provider numbers or other information.
Step 9:	Click the button **[Save]** to save your changes.

Step 2f: Appearance

You can adjust the appearance of BizDiary by adding your own logo and customising the color scheme.

Follow these steps for adjusting the appearance...

Step 1:   Click on **Account** and select **Settings**.

Step 2:   Click on the **Appearance** tab.

Step 3:   To change the **Logo**, click the **[Browse...]** button, and select a file (GIF, JPEG, or PNG).

The logo should be no more than 240 x 80 pixels.

Step 4:   Choose a predefined color **Theme** from the drop down list.

The various colors shown below will change to those set by the theme.

Step 5:   Make changes to the individual color settings to tweak the appearance to your liking.

Click the color selector button **[...]**, and adjust the color.

For more help see **Appendix E: Using the Color Selector.**

Step 6:   Click the **[Save]** button to see your changes.

Step 3: Set up Services

Your business will offer one or more services to customers, ranging from various types of appointments, consultations, lessons, etc. It is recommended that services be set up before adding any other items. More services can be added later as needed.

Follow these simple steps to create a new **service** record...

Step 1:   Select **Services > New** from the menu.

Step 2:   Enter a **Name** for the Service.

Step 3:   *(optional)* Enter a **Group** (used for reporting).

Step 4:   *(optional)* Enter a **Description** (displayed to customers).

Step 5:   Enter a default **Duration** (in minutes).

              The actual duration can be modified when an appointment is made.

Step 6:   Use the color selector to choose a **Color** for this type of appointment in the calendar.

              For more help see **Appendix E: Using the Color Selector.**

Step 7:   *(optional)* Enter a **Cost**, or range of costs (displayed to customers).

Step 8:   *(optional)* Add any **Notes** if needed.

Step 9:   Recheck all the values on the form and then click the **[Save]** button.

Step 4: Set up Locations

Your business may operate out of one single location or from a variety of locations. These locations could be premises in different suburbs or even cities, or may just be separate consultation rooms at the same address.

Follow these simple steps to create a **location** record...

Step 1:   Select **Locations > New** from the menu.

Step 2:   *(optional)* Enter a **Group** for the Location.

                    This feature enables you to group together multiple rooms and present them as a single location (e.g. by suburb).

Step 3:   Enter a **Name** for the Location.

Step 4:   *(optional)* Enter a **Description**.

                    This field can be used to enter an address or other details of the location.

Step 5:   Click on the **Hours** tab and add the opening hours for this location.

                    For more details, see **Appendix C: Entering Opening Hours**.

Step 6:   Click on the **Services** tab and check all the services that are offered at this location.

Step 7:   *(optional)* Click on the **Notes** tab and add any notes if needed.

Step 8:   Recheck all the values on the form and then click the **[Save]** button.

Step 5: Set up Personnel

Personnel records are used to represent the people who provide services to customers.

Only create personnel records for those members of staff who can be booked for an appointment. For example if your business has a receptionist, that person would typically **not** require a personnel record. They would however probably need a **user** record (see next section).

Follow these simple steps to create a personnel record...

Step 1:   Make sure you have added all the services appropriate to your business.

Step 2:   Select **Personnel > New** from the menu.

Step 3:   Enter the Person's **First Name** and **Last Name**.

Step 4:   Enter a **Display Name**.

You may want to just use the first name, or the first name and initial. Whatever you use, it must be unique.

Step 5:   *(optional)* Enter a **Group** name. Groups can be used to group together several employees. Common usage includes group by related function/job, or grouping according to location.

This Group can then be used when viewing the Calendar in Daily or Weekly view and in the Appointment Summary.

Each personnel can only be associated with one Group.

Step 6:   Enter the other details, including at least one **phone number**.

Email and **Phone(mob)** are strongly recommended as these are used for the integrated communications.

Step 7:   Click the **Availability** tab and add rows to define the person's availability.

For more details, see **Appendix D: Entering Work Hours**.

Step 8:   Click the **Services** tab and check the boxes for all services that this person provides.

Step 9:   *(optional)* Click the **Notes** tab and add any notes if needed.

Step 10:   Recheck all the values on the form and then click the **[Save]** button.

When you click **[Save]** the system will check that all required fields have been entered.

If this member of personnel needs to log onto the system, for example to make their own appointments or to view their calendar, then a **User** record is also required. The user record should then refer to this new personnel record.

Step 6: Set up Users

A **user** logs into the system, using their **User name** and **Password**.

If specified, the **Email address** is used to send the user notifications.

A user's **level** determines which features of the system can be accessed.

A user can be associated with a member of **personnel**. When this is set the system is able to show a person a summary off her/his appointments, and customise the system in other way.

Follow these simple steps to create a user record...

Step 1:   If this user is someone who will be booked for appointments, create a **personnel** record first. If this will be a customer, create the **customer** record first.

Step 2:   Select **User > New** from the menu.

Step 3:   Enter a **User name**. Used for logging in.

Step 4:   Enter a **Password** and the same again in the **Confirm password** field.

The user can later change the password.

Step 5:   Enter the **Full name** of the user.

Step 6:   Enter the **Email** address of the user.

Step 7:   Choose the access **Level**.

The level defines what functionality can be accessed by this user.

Step 8:   *(optional)* If this user is to be attached to a **Customer**, select the customer.

Step 9:   *(optional)* If this user is to be attached to a **Personnel** record, select the person.

Step 10:   Recheck all the values on the form and then click the **[Save]**button.

When you click **[Save]** the system will check that all required fields have been entered.

Step 7: Add Customers

Customers are the core of any business. When you are setting up you will probably want to enter information for at least some of your existing customers.

A **customer** record can represent a Customer, Client, Patient, or any other person to whom you offer appointments.

Follow these simple steps to create a customer...

Step 1:   Select **Customers > New** from the menu

Step 2:   Enter the Customer's **First Name** and **Last Name**.

Step 3:   *(optional)* Enter a **Code**. This could be a customer or file number from your accounting system.

Step 4:   Enter at least one **phone number**.
              (If you want to use integrated SMS, you must fill in the mobile number).

Step 5:   *(optional)* Enter a **fax number**.

Step 6:   *(optional)* Enter an **email address** if available.
              Email provides an efficient and cost-effective means of communicating with your customers.

Step 7:   *(optional)* Enter **address** details.

Step 8:   *(optional)* Click the **Notes** tab and add any notes if needed.

Step 9:   Click the **Preferences** tab and set the customers messaging preferences.

Step 10:   Recheck all the values on the form and then click the **[Save]** button.

When you click **[Save]** the system checks that all required fields have been entered.

It is worth taking the time to fill in as much detail as possible for your Customer records.

Step 8: (optional) Edit System Codes

You can edit a number of system codes which are used in a variety of drop-down lists....

- **Appointment Cancellation Reasons**: Cancellation reasons for cancelled appointments.

- **Customer Referral Sources**: The source for customer referrals.

- **Customer Statuses**: Can be used to designate different customer statuses.

- **Event Types**: Types of events (e.g. Meal Break, Leave, etc).

IMPORTANT:

Be VERY CAREFUL about removing codes unless you are sure they are no longer used. If you remove a code that is still being used on other records (Customers, Appointments, etc) then that code will disappear from all of those records. In this case it may be better to disable the code.

To change the codes...

Step 1:   Login as an **admin** level user.

Step 2:   Select **Account > Codes** from the menu.

Step 3:   Select the tab for the codes you want to change.

Step 4:   You can change the labels, disable/enable a code, remove codes, add new codes, and reorder them.

Step 5:   When you are done, click the **[Save]** button to save your changes.

For each set of codes you can have up to 30 options. You can change the order of appearance in the drop down list, by clicking the arrow buttons.

Managing your Account

Settings

Settings affect the operation and appearance of the system, including date and time settings, SMS templates and reminders, Email templates and reminders, and themes and colors.

Settings can only be changed by an Administrator.

Settings are described in detail in **Setting up your BizDiary**.

Buy SMS Credits

The **Buy SMS Credits** page is accessible to managers and administrators for the purchase of additional SMS credits. These credits are available as soon as payment is cleared.

Depending on your current package you are entitled to a number of free SMS credits each month. If you use up all of your free credits then you will need to purchase extra credits. These credits are only ever used when you have no free credits left.

Upgrading / Downgrading Account

From the Trial you can upgrade to a paid account. Later you may also want to change your account package.

Upgrading/changing your Account Package

Only an admin user can make changes to the account.

To upgrade or change your account package, select the **Upgrade** option from the **Account** menu, and follow the on-screen instructions.

Upgrades and changes are handled through PayPal, and take effect within a few minutes of completing the PayPal process.

Upgrading your Account

If you require additional personnel or locations, or want a larger number of included SMS messages you should upgrade your account.

Downgrading your Account

If you no longer require as many personnel or locations, or find that you are not using many of the included SMS messages you may want to downgrade your account to a better valued option.

Cancelling your Account Package

Only an Administrator user can cancel the account.

Account cancellation is accessed via **Account | Cancel Account**.

The cancellation form will take you to PayPal. Once you log in you simply cancel the subscription.

Step-by-Step Guides

These guides will provide you with the basic steps for some of the more common tasks that you will come across when using BizDiary.

For details on creating Customers, Users, Personnel, Services and Locations, you should refer to the relevant steps in the **Setting up your BizDiary** chapter.

Creating a new User record

Follow these simple steps to create a user record...

Step 1:   If this user is someone who will be booked for appointments, create a personnel record first. If this will be a customer, create the customer record first.

Step 2:   Select **User > New** from the menu.

Step 3:   Enter a **User name**. Used for logging in.

Step 4:   Enter a **Password** and the same again in the **Confirm password** field.

                The user can later change the password.

Step 5:   Enter the **Full name** of the user.

Step 6:   Enter the **Email** address of the user.

Step 7:   Choose the access **Level**.

                The level defines what functionality can be accessed by this user.

Step 8:   *(optional)* If this user is to be attached to a **Customer**, select the customer.

Step 9:   *(optional)* If this user is to be attached to a **Personnel** record, select the person.

Step 10:   Recheck all the values on the form and then click the **[Save]** button.

When you click **[Save]** the system will check that all required fields have been entered.

Notes:

   •   When entering the password the characters you type are replaced with asterisks (****).

   •   When you go to edit a user the number of asterisks shown does **not** indicate the number of characters in the current password. This is an intentional security feature.

Changing your Password

Follow these simple steps to change your password...

Step 1:   Click the user-name link at the top-right of the screen.
(Just below the [Log out] link.)

Step 2:   Go to the **Password** field, and type a new password.
(Make sure that the old characters are deleted.)

Step 3:   Go to the **Confirm password** field, and type the **exact** same password.
(Again, making sure that the old characters are deleted.)

Step 4:   Click the **[Save]** button.

When you click **[Save]** the system will check that the entered passwords match.

Notes:

   •   When entering the password the characters you type are replaced with asterisks (****).

   •   When you go to edit a user the number of asterisks shown does **not** indicate the number of
       characters in the current password. This is an intentional security feature.

Security

Access to the system as a whole, and to its various functions is controlled through **User** records.

A **user** logs onto the system using their **user name** and **password**. Each user has a defined **security level** which is one of...

Read-only User   A **read-only user** can...

- Access the **calendar**.

- Edit their own **user** record.

- Access their own **My Notes** page.

- Turn **Show Hints** on and off.

User   A general **user** can...

- Access the **calendar**.

- Create, modify and delete **appointments**, **events**, and **tasks**.

- Create, modify and delete **customers**.

- Edit their own **user** record.

- Access their own **My Notes** page.

- Turn **Show Hints** on and off.

Manager   A **manager** has all the access of a general user, and can also edit other users whose level is **user** or **customer**.

Managers can also use the **delete all** feature to do bulk deletes.

Administrator   An **administrator** user has full access to the system. The administrator sets up Services, Locations, Personnel and Users, as well as Settings.

System Admin   The **system administrator** is for internal use only, used by the Support department when investigating problems.

The system also creates User records for Customers when a customer is given on-line access. These records are not shown as part of the normal user list as they are maintained by the system.

Setting User Permissions

An **administrator** level user can set specific permissions on other users (Manager, User, Read-only User). These additional permissions are set in the User record...

- Send SMS

- Send Email

- Buy SMS credits

- Send Bulk SMS

- Send Mailout

- Export Data

- Run Reports

Integrated Messaging

Introduction to Messaging

BizDiary provides integrated message capabilities through **SMS text messaging** and **email**.

One of the most useful aspects of this is the ability of the system to automatically send reminders to customers a few working days before their appointment. These reminders can be sent via email or SMS (or both). Settings exist to control when these messages are sent, and individual customers may choose whether or not they want to receive these reminders.

Automatic Reminders

Whether and when automatic reminders are sent depends on a number of settings, customer preferences, and the current state of the appointment. It is important to understand how these factors affect the sending of messages.

Workdays

On the first page of the **Account Settings** is a list of **Workdays for reminders** these may be set to control when a reminder is sent.

If for example you set reminders to be sent two working days before the appointment, and set the workdays as Monday-Friday, then Monday's appointments will be reminded on Thursday, and Tuesday's appointments will be reminded on Friday.

This feature can be used to ensure that appointment reminders are always sent on a day when someone is available to respond to customers who may need to contact you in regard to their appointment.

SMS Settings

On the **SMS Settings** tab of **Account Settings**, you control the sending of SMS messages, including the sender shown with the message, the template, and when the reminders go out.

The **Auto-remind** check box must be ticked for reminders to be sent.

Also in the settings are a **Reminders From / To** and **Days Before** setting which control when the reminder will be sent.

The **Days Before** setting is the **first** time an attempt will be made to send the reminder. Once a reminder is sent the appointment has the **Sent Email** or **Sent SMS** flag switched on as appropriate.

Customer Preferences

In customer preferences are fields for **Send SMS Reminders** and **Send Email Reminders**. SMS and Email will only be sent if these flags are turned on. (Manual SMS and Email can be sent regardless).

Customer Details

Even if the preferences allow it, an email can only be sent if there is a valid **Email** address, and an SMS can only be sent if there is a valid mobile number in the **Phone(mob)**field.

Appointment Details

Automatic reminders are only triggered if the applicable **Sent Email** or **Sent SMS** flags are off at the scheduled sending time and the status is **Unconfirmed**. Once a reminder has been sent the appropriate flag is switched on, but it can still be turned off manually if desired.

SMS and Email Reminder Templates

SMS reminders and Email reminders work by filling in placeholders in a template.

For details on creating the **Template** see **Appendix F: Template Macros**.

Testing the Template

Once you have created your template it is a good idea to test it. To test the template, go into the Calendar, select and appointment and choose **Send SMS** or **Send Email**. The message that would be sent will show. Make sure you choose **[Cancel]** to close the window without sending.

SMS Credits used

Longer messages may use 2 or even more credits when send SMS reminders. You may want to take this into consideration when building your SMS template.

Handling Replies

If you turn on **Allow SMS Replies**, the SMS Sender is no longer used. The message will instead show as coming from one of our SMS provider's fixed mobile numbers.

When an SMS message has been sent, the recipient has the option of sending an SMS reply. This reply can be used to update the status of the appointment to **Confirmed**, or to **Cancel** the appointment, or the reply can be forwarded to your reception email account.

Settings

The email that is used for replies is set in **Account Settings**. Enter the appropriate email address in the **Reception email** field (this can also be used for appointment notifications).

The action taken when receiving an SMS reply is controlled on the **SMS Settings** page of **Account Settings**.

If **"Yes" confirms** is checked, then a reply where the first word is "Y" or "Yes" will change the appointment status to **Confirmed**.

If **"No" cancels** is checked, then a reply where the first word is "N" or "No" will **cancel the appointment**.

If the reply message contains anything else, or it contains additional information then the reply is forwarded to the reception email.

Report Scheduling

BizDiary allows you to schedule certain reports to be sent on a regular basis to your email.

Creating a Report Schedule

Follow these simple steps to create a report schedule...

Step 1:   Select **Reports > New Report Schedule** from the menu.

Step 2:   Select the desired **Report** from the drop-down list.

Step 3:   Choose who to **Send to**.

You can send a full report to a **specified email address** (or addresses),
... or ...
Send a report specific to **each personnel** to their email address.

Step 4:   Enter the **Email** address or addresses (one per line).

Only needed if **Send to** is **specified email**.

Step 5:   Select the **data range**.

The report will include data for the last or next 24 hours etc, depending on report chosen.

Step 6:   Select to **send every** 24 hours, 7 days, or 4 weeks.

Step 7:   Choose the **time** (whole hour) at which to send the report.

Choose a time outside of normal appointment hours. E.g. "4am".

Step 8:   Select the date which this report is **starting on**.

This is especially important for 7 day, or 4 week reports. If you want the report to be created every Monday at 4am, then choose a date that is a Monday.

Step 9:   Make the schedule **active**. This field can be used for temporarily disabling a schedule, but usually you want it turned on.

Step 10: Recheck all the values on the form and then click the **[Save]** button.

When you click [Save] the system will check that all required fields have been entered.

Reports that can be Scheduled

The following reports can be scheduled...

Appointment Changes	This report summarises the appointments which are new or have been updated.
	For example when the data range is 24 hours, the report will include any appointments created or updated in the 24 hours prior.
	When sent to "Each personnel", each person gets any of their appointments that are new or have been changed. (Rather than the ones they created/changed).
Appointment Summary	This report gives summary level details of upcoming appointments.
	For example when the data range is 7 days, the report will include any appointments scheduled to occur in the next 7 days.
	When sent to "Each personnel", each person gets a list of their appointments.
Appointment Detail	This report gives details of upcoming appointments.
	For example when the data range is 4 weeks, the report will include any appointments scheduled to occur in the next 4 weeks.
	When sent to "Each personnel", each person gets a list of their appointments.

Appendix A: Support

If you have any problems using the system, the **Support Dialog** provides the most efficient way to resolve your problem.

When to seek Support

For help on how to use the system, please refer to the On-line Help, and to this User Guide.

In the unlikely event that you receive an error, or have a problem with BizDiary, you should click on the **Support** link in the header menu.

If possible, click on the Support link from the **page where the problem occurred**. This allows the system to automatically pass information that may be helpful in resolving the issue.

Support Form

In the support form you provide information about the problem or question that you have. The system also automatically includes other information that may help in investigating the problem.

When you click on the **[Send]** button, the information is logged and sent via email directly to the support department.

An acknowledgement form is shown with a reference number for your support request and an email is also sent to the contact email address.

What happens next?

The support department will look at the support request and may need to contact you for further information, either by email or phone.

In most cases you will receive a reply with an hour or two during working hours. In all cases you will receive a reply within one working day, to inform you of the status of your issue, and what steps are being taken to resolve it.

Appendix B: Glossary

Appointment	An appointment sets aside a block of time for a customer to receive a specified service.
Calendar	The calendar provides a variety of different views of appointments and events.
Customer	A customer record can represent a Customer, Client, Patient, or any other person to whom you offer appointments.
Event	An event takes up a time-slot in the calendar, but does not involve a customer.
	E.g. A meeting, Lunch break, etc.
Hints	Hints are helpful text boxes that pop up when you hover over labels and buttons. These can be turned off through the Toolbox menu.
Home Page	The Home Page shows your current information. It is the first page when you log in.
Location	Common locations are rooms, offices, work-sites, etc. (E.g. "Room A")
Personnel	Personnel records are used to represent the people who provide services to customers.
Service	Services are provided to customers by personnel.
Toolbox	The toolbox contains settings, SMS and other tools.
SMS	SMS messages are short text messages that can be sent from the system to a mobile phone.
Task	A task keeps track of something that needs to be done.
User	A user logs into the system, using their User name and Password.

Appendix C: Entering Opening Hours

The general **opening hours** for a **location** are entered by creating rows that define the blocks of time across one or multiple days of the week.

Each row has three pieces of information...

- A day of the week, or predefined group of days (e.g. "Weekdays").

- The start time.

- The end time.

Simple opening hours

Many businesses operate very regular hours and can define these with a single row.

Example: To set the opening hours for a location which opens Monday to Friday, 9am to 6pm...

1. Select "Weekdays" from the list.

2. Enter "9am" in the **from** field, and "6pm" in the **to** field.

More complex hours

For more complex hours additional rows are created by clicking the **[Add]** button.

Example: With the previous example, Weekdays 9am-6pm, we might also include reduced hours on a Saturday, say 9am-1pm. To do this we would...

1. Add another row (by clicking the **[Add]** button.

2. Select "Saturday" from the day list.

3. Enter "9am" in the **from** field, and "1pm" in the **to** field.

Split days

If a location has a closure for part of the day, this can be accommodated by using multiple rows.

Example: Taking the first example again (Weekdays 9am-6pm), we might want to close down from 1pm until 2pm.

To do this we need one row for the morning and one for the afternoon.

1. In the first row select "Weekdays" from the list.

2. Enter "9am" in the **from** field, and "1pm" in the **to** field.

3. Add another row (by clicking the **[Add]** button.

4. Select "Weekdays" from the day list.

5. Enter "2pm" in the **from** field, and "6pm" in the **to** field.

Appendix D: Entering Work Hours

The available **work hours** for a **person** are entered by creating rows that define the blocks of time at one or more locations across one or multiple days of the week.

Each row has four pieces of information...

- A day of the week, or predefined group of days (e.g. "Weekdays").

- A single location or "Any location".

- The start time.

- The end time.

Simple availability

For basic working hours hours it may be possible to define them with a single row.

Example: Aaron works from Monday to Friday, in Location A, from 9am to 6pm.

To defined Aaron's work hours...

1. Select "Weekdays" from the day list.

2. Select "Location A" from the locations.

3. Enter "9am" in the **from** field, and "6pm" in the **to** field.

Including a fixed lunch-break

If a person requires a fixed lunch break, this can be accommodated by having one row for each part of the day.

Example: Taking the first example (Weekdays 9am-6pm), we could give Aaron a lunch break from 1pm until 2pm. To do this we create one row for the morning and one for the afternoon.

To defined Aaron's work hours, including a lunch break...

1. Select "Weekdays" from the day list.

2. Select "Location A" from the locations.

3. Enter "9am" in the **from** field, and "1pm" in the **to** field.

4. Add another row (by clicking the **[Add]** button.

5. Select "Weekdays" from the day list.

6. Enter "2pm" in the **from** field, and "6pm" in the **to** field.

More complex work hours

Even very complex working hours can be catered for by adding more rows as needed.

Example: Barbara works from 9am to 6pm with a lunch break from 1pm to 2pm.

On Monday and Wednesday she works at her office in St. Leonards. On Thursday she works at her office in Gordon.

To define Barbara's work hours...
1. Select "Monday" and "St Leonards", and enter "9am" and "1pm" in the time fields.
2. Add another row (by clicking the **[Add]** button.
3. Select "Monday" and "St Leonards", and enter "2pm" and "6pm" in the time fields.
4. Add another row (by clicking the **[Add]** button.

5. Select "Wednesday" and "St Leonards", and enter "9am" and "1pm" in the time fields.
6. Add another row (by clicking the **[Add]** button.

7. Select "Wednesday" and "St Leonards", and enter "2pm" and "6pm" in the time fields.
8. Add another row (by clicking the **[Add]** button.

9. Select "Thursday" and "Gordon", and enter "9am" and "1pm" in the time fields.
10. Add another row (by clicking the **[Add]** button.

11. Select "Thursday" and "Gordon", and enter "2pm" and "6pm" in the time fields.

Other considerations

It is possible to cater for very complex working hours, but in most cases just one or two rows will be all that is needed.

Consider carefully whether a **fixed lunch break** is appropriate. Depending on the nature of your business, you may want to keep you schedule more flexible. This can be done by adding lunch breaks as **events** once you see how the day is filling up. Using this method does require some care though, as if there is a sudden rush of appointments you might find yourself without a break!

Appendix E: Using the Color Selector

The **color selector** is used to pick display colors for **Services** and in the **Appearance** section of the Settings.

How to use the color selector

To activate click the selector button **[...]**. Choose a color and then click the **[ok]** button to accept.

To switch between **simple** and **advanced** mode click the link at the top of the selector.

The current color

The square at the bottom-left shows the current color. It changes as you make your selection.

Simple mode

In simple mode the color picker gives you a grid of 64 commonly used colors to choose from. Just click on the color you want and then click .

You can also choose a color in simple mode and then switch to advanced mode to alter it slightly.

Advanced mode

Hue: On the right is a tall rectangle filled with a rainbow of colors. You can click anywhere inside the rectangle to select the desired hue.

For example, if you want a orange tone then click up near the top of the rectangle in the orange area. The little markers on each side indicate the currently selected hue.

Lightness / Saturation: The square on the left controls lightness and saturation (vividness). Click in the area to set these properties. The circle shows the current setting. You can also drag the circle around to get the perfect color.
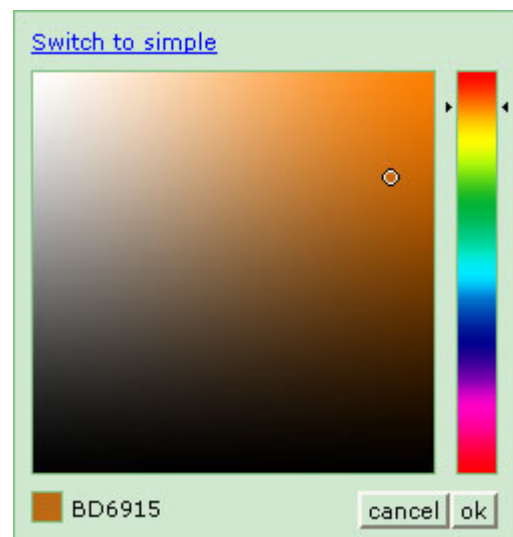
HTML colors

If you are familiar with HTML colors, or have an application that provides them to you, these can be entered directly.

E.g...

Red=FF0000 Orange=FF8000 Yellow=FFFF00 Green=00FF00 Blue=0000FF Magenta=FF00FF

Appendix F: Template Macros

Macros are placed in SMS and Email templates as place-holders for real information, such as a Customer's name.

The macros are available for use in the SMS and Email templates (found in Settings).

The text can either be typed directly or added by using the buttons provided.

Macros appear in square brackets (e.g. [Location]).

Cust.First	First Name of the Customer (e.g. "Mary").
Cust.Name	Full Name of the Customer (e.g. "Mary Johnson").
Date	Appointment date (d/m/y).
Day	Appointment day (e.g. "Monday").
Short.Day	Appointment day in short form (e.g. "Mon"),
Time(am/pm)	Appointment time (am/pm).
Time(24hr)	Appointment time (24hr).
Service	Name of Service.
Person	Name of Person.
Location	Location Name.
Loc.Group	Location Group.
Loc.Desc.	Location Description.