

BizDiary **User Guide**

Table of Contents

About this Guide.....	3
Using this document.....	3
Further Reading.....	3
Introduction.....	4
Features.....	4
Help and Hints.....	4
Demo.....	4
30-Day Free Trial.....	4
On-line Help.....	5
Becoming Familiar with BizDiary.....	6
General Layout.....	6
The Header Menu.....	6
The Main Menu.....	7
The Home Page.....	8
Browsing and Searching.....	9
Using the Search Forms.....	10
Bulk Delete.....	12
The Calendar.....	13
Appointments.....	16
Events.....	16
Tasks.....	17
Customers.....	18
Receipts.....	19
Personnel, Services and Locations	19
Account.....	20
The Toolbox.....	20
Step-by-Step Guides.....	21
Creating a new Customer (from the menu).....	21
Booking an Appointment.....	22
Recurring Appointments.....	23
Creating an Event.....	24
Recurring Events.....	25
Setting a Task.....	26
Changing your Password.....	27
Advanced Calendar Topics.....	28
Moving an Appointment or Event.....	28
Copying an Appointment or Event.....	28
Appointment Wait-list.....	29
Integrated Messaging.....	30
Introduction to Messaging.....	30
Automatic Reminders.....	30
Sending SMS messages.....	31
Bulk SMS.....	32
Mailing Lists.....	33
The Mail-out Feature.....	33
Mail-out Types.....	33
Creating a Mail-out.....	33
Customer opt-out.....	33
Reports.....	34
Running Reports.....	34
Available Reports.....	35
Scheduled Reports.....	35

Appendix A: Support.....36
Appendix B: Glossary.....37
Appendix C: Using the Customer Selector.....38
Appendix D: Quick Customer Add.....39

About this Guide

This User Guide provides details on the day-to-day use of the BizDiary appointment system. It includes instructions on booking and managing appointments, and working with customer details. It also covers other subjects such as sending SMS messages and emails.

If you are looking for information on how to sign up for a **trial account** or on how to **set up the system** you should refer to the [BizDiary Administrator Guide](#).

Using this document

It is a good idea to read [Becoming Familiar with BizDiary](#), and also check out some of the [Step-by-Step Guides](#).

The [On-line Help](#) will also be able to answer many of your questions, but for more detailed answers you may need to refer back 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 at least skim over the manual and use the on-line help when you are starting out.

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. You will find 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.

Information on the optional **Customer Module** is in a separate guide, the [BizDiary Customer Module Guide](#).

Introduction

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

Features

BizDiary is packed with features to help take away the burden of handling appointments so that you can maximise your customer service opportunities, and still have time for other tasks that need to be done.

- BizDiary is **powerful** yet **easy to use**.
- Take appointments **7 days a week, 24 hours a day**, from anywhere you can access the internet.
- Maintain a **to-do list**, so that those important jobs get done on time.
- **Built in text-messaging (SMS) and email** makes it easier and more efficient than ever to stay in contact with your customers, providing them with a better service, and saving you the time and money.
- Reduce no-shows, with **automatic SMS and/or email reminders** to customers.
- Keep better records of customers' past, upcoming, and future appointments.

The system is compatible with Firefox (v.2 or above), Internet Explorer (v.6 or above) and Safari. It is also compatible with modern hand-held devices such as the iPhone, and many Android phones.

Help and Hints

Every screen in BizDiary has **intelligent context-sensitive help** available, with links to other relevant topics and an easy to access Contents page.

Data-entry forms also have helpful **pop-up hints** that describe each field and how it is used. These are great when you are starting out, and can easily be switched off or on from the menu.

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. No credit card details or payment of any kind is required.

The trial account has all the features of a paid account, and should you decide to continue using BizDiary then all your information is retained in your account.

More detail is available in the [BizDiary Administrator Guide](#).

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.

When you click the **Help** link on any page you will be taken to the most relevant page in the help system. There will also be links to other related parts of 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**.

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.

Table of Contents

The contents page in the help provides direct links to the most common pages in the help.

Step-by-Step Guides

The help includes several Step-by-Step Guides that will take 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** help.

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, 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.

Becoming Familiar with BizDiary

General Layout

BizDiary uses a consistent layout for the display of information and for data-entry.

The top section of the screen, the header area, shows your logo and business name, the current page title, and includes the **header menu** with important links **Home**, **Help**, **Support** and **Log out**.

There is a link for the **current user**. Clicking lets you change your log-on details, including your password.

On the left-hand side of the screen is the **main menu**.

Additional dialogs may pop up over the main screen. These include **messages**, on-line **help**, and special selectors such as the customer selector, date selector and colour selector.

The Header Menu

The header menu contains the following links...

Home	Takes you to the Home page.
Help	Context-sensitive help. Gives help which relates directly to the page you are currently on.
Support	Opens the support request form.
Log out	Logs you out of the system.

The Main Menu

The main menu lets you access the different parts of the system. Click one of the entries to open up the submenu. For example to create a new customer you would click on **Customers** and then select **New Customer**.

Depending on your user security level you will be able to access some or all of the following...

Calendar	Provides views of appointments and events .
Appointments	An appointment sets aside a block of time for a customer to receive a specified service.
Events	An event takes up a time-slot in the calendar, but does not involve a customer. E.g. A meeting, Lunch break, etc.
Tasks	A task keeps track of something that needs to be done.
Customers	A customer record can represent a Customer, Client, Patient, or any other person to whom you offer appointments.
Receipts	You can create and print simple receipts for your appointments, and other items.
Services	Services are provided to customers by personnel.
Locations	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.
Users	A user logs into the system, using their User name and Password .
Reports	Run reports, and manage scheduled reports.
Account	Account Settings and Details, Buy SMS Credits, Upgrade Account.
Toolbox	My Notes, Hints, send SMS, and Mail-out.

The Home Page

The Home Page shows your current information. It is the first page when you log in and can be accessed at any time by clicking the **Home** link in the header menu.

Welcome

The first section of the Home page shows a welcome message, which includes a link to the current user's record, log-in information, details of SMS credits, and other system messages.

Clicking the user link takes you to the User Edit screen.

To-Do Lists

Outstanding (incomplete) personal and general tasks are listed in groups...
Overdue Tasks, Tasks Due Today, Future Tasks, and Other Tasks (no Due Date).

To edit a task, click on the task description. You can also quickly mark a task as completed by ticking the checkbox.

Appointments / Events

Appointments that have been **Wait-listed**, are summarised here.

If you have a personnel record linked to your user, then you will also see a summary of **upcoming appointments and events**.

If you are not seeing your appointment summary ask your administrator to set the Personnel in your User record.

Browsing and Searching

Browsing allows you to view all of a particular kind of record.

Searching provides a way to find a particular record or records.

You can **Browse** different types of records by selecting from the menu.


E.g. To browse customers, **Customer > Browse Customers**.

You also access the **Search** from the menu.


E.g. To search customers, **Appointments > Search Appointments**.

Both **Browse** and **Search** show the list of records in a grid format. If there are too many records to fit on the page then tabs will appear along the bottom.

You can **sort** the returned data by clicking on the column headings.

To **view** a record, click the magnifying glass icon (.

To **edit** a record, click the pencil icon (.

To **delete** a record, click the cross icon ().
(A confirmation page is shown first.)

If there is more than one page full, then tabs will display below the list allowing you to browse through all of the available records.

Using the Search Forms

The Search capabilities in BizDiary are very powerful and easy to use.

When **searching** you will be taken to a form that allows you to enter a number of search criteria. Fill in the fields to define your search.

If a field is left blank, the search will allow any value for that field. Otherwise the search looks for a combination that meets ALL the entered values.

Using wildcards for partial matching

The **wildcard character** (*) can be used to indicate a number of missing letters or digits when making a search.

Wildcards are very useful when you are unsure of the spelling of a person's name or a place name, or to try to find a record where there may have been a data-entry error.

Some examples...

- To search for all names beginning with "Sm" enter "Sm*".
- To search for an address which could have any street number and had a name like Pacific Road or Street or Avenue, you could type "* Pacific *".
- To search for a phone number which begins with a "9" and has "036" somewhere in it, you could type "9*036*".

Note: In the Search forms it is not necessary to put a * in fields where you want to allow any value, just leave them blank.

Searching for empty fields (-)

Searching for empty fields requires you to enter a single dash character (-) to tell the system that you want to find the records with NOTHING in that field.

Some examples...

- To look for all your customers who DO NOT have a mobile phone number, enter "-" (without the quotes) in the **Phone (Mob)** field.
- To look for all your services where the description has not been filled in enter "-" in the **Description** field.

Searching for "not specified"

You can also search for unspecified values in fields that use drop down lists. This is done by selecting the "not specified" option.

Example...

- To look for all your customers who DO NOT have a Title, select "not specified" in the **Title** field.

Searching on a Date range

Appointments and events have date, as do some other items. You can search for items within a range of dates, by entering one or both of the **From date** and the **To date**.

Some examples...

- To find all appointments **between** the 22/2/2010 and the 28/2/2010 (inclusive) you would enter 22/2/2010 in the **From date** and 28/2/2010 in the **To date** of the Appointment Search form.
- To find all events **created after** the 1/2/2010 you would enter 1/2/2010 in the **Created from** field (on the History tab), and leave the **Created to** field blank.
- To find all tasks with a due date **before** the 1/1/2010 you would enter 1/1/2010 in the **Due to** field, and leave the **Due from** field blank.

Searching on History

Appointments, Events, Tasks, and Customers keep a simple history record -

- Date and time the record was created.
- Which user created the record.
- Date and time the record was last updated.
- Which user updated the record.

This information can be viewed on the **History** tab, and can also be very useful in searching.

For example, you may want to know which Customers have been created since the start of the year.

To find this information...

1. Go to **Customers > Search**.
2. Click the **History** tab.
3. Select the **Created from** date (e.g. 01/01/2010).
4. Click **[Search]**.

Exporting Results

Sometimes it is useful to get the data out of BizDiary for importing into other systems, or for further analysis.

You can export the data from either the Browse screens or from Search Results. Click the [Export] link at the bottom of the page to export your data as a CSV file (compatible with Excel, and many other software products).

When you click [Export] you will be shown a list of fields that can be exported. They are grouped together in logical groups.

You can check and uncheck individual fields, or select to include all the fields in a group or none of the fields in a group.

Data export is only available to Managers and Administrators.

Bulk Delete

Sometimes you need to delete a large number of records. For example, appointments.

Once records are deleted, they are gone permanently, so bulk deletion should be done with extreme care, and is only permitted to an Administrator-level user.

To perform a bulk delete, do a Search which will return ONLY the items you want deleted. You will see a DELETE ALL link at the bottom of the results.

Clicking the link will tell you how many records are going to be deleted, and warn you that the records cannot be recovered.

Clicking the [Delete] will give you one last warning.

Clicking [DELETE] again will delete the records – permanently.

The Calendar

The Calendar provides a variety of views of your **appointments** and **scheduled events**...

Monthly view: An overview of appointments and scheduled events by calendar month.

Weekly view: An overview of appointments and events by week.

Day Planner: Shows appointments and events for a single day.

View by Personnel or Location

To view by **personnel** or **location** click the appropriate tab and then select from the drop-down list.

In the **weekly view** and **day planner** you can also view by Personnel and Location groups, or view all.

When viewing all or groups the calendar is arranged by days and then by each personnel or location.

Navigating the Calendar

To select a new day, week or month, click the button next to the current range.

Or you can use the quick navigation buttons to move backwards and forwards through the date ranges...

View	«	<	>	»
Monthly view:	previous year	previous month	next month	next year
Weekly view:	-4 weeks	previous week	next week	+4 weeks
Day Planner:	previous week	previous day	next day	next week

Appointment and Event Preview

For a quick **preview** of an appointment or event, place the mouse cursor over the record you are interested in. A pop-up window displays the main information for the appointment.

Create Appointments and Events

To create a new appointment or a new event, click on the cell for the start time (indicated by "+"), and then select from the pop-up menu. (Events can only be created for personnel, NOT locations.)

View, Edit and Delete Appointments and Events

To **view**, **edit**, or **delete** the record, click to open the menu and select **View**, **Edit**, or **Delete**.

Edit the Customer

The menu also provides quick access to the **Customer** record. Click the appointment, and select **Edit Customer** to go directly to the customer record associated with this appointment.

Receipt

The menu also provides access to create and edit a simple **Receipt** for an appointment. Click the appointment, and select **Receipt**.

If a receipt is already associated with this appointment it will be opened for editing. Otherwise a new receipt will be created using information from the appointment.

Send SMS or Email

For appointments you can also **send an SMS**, or **send an Email** confirmation to the customer. Just click to open the menu and then choose **Send SMS** or **Send Email**.

Copy Appointment or Event - Copy and Paste

To quickly **copy** an appointment or event, click the item, select **Copy** from the menu, and then click on an empty timeslot and click **Paste**. You can even copy an appointment between Locations or to a new Personnel, by changing the Calendar selection before pasting.

Move Appointment or Event - Cut and Paste

To quickly **move** an appointment or event, click the item, select **Cut** from the menu, and then click on an empty timeslot and click **Paste**. You can even move an appointment between Locations or to a new Personnel, by changing the Calendar selection before pasting.

Search for Appointments or Events

You can also **search** for specific Appointments or Events using the powerful search tools provided.

To search for appointments, click on **Appointments > Search Events**.

To search for events, click on **Events > Search Events**.

Appointments

About appointments

Appointments are at the centre of BizDiary. An appointment sets aside a block of time for a customer to receive a specified service.

Appointments and events are set to occur at a specified date and time and for a specific duration. In general the system ensures, for a given person or location, that there will be no overlap in these times.

For details on booking appointments, see [Booking an Appointment](#).

Cancelled appointments

One exception to the rule is for appointments marked as Cancelled. These appointments do not appear in the normal Calendar, but can be found by searching.

Making an appointment Cancelled rather than simply deleting it provides a useful record, without having the item take up space in the Calendar.

Wait-listed appointments

A customer may book an appointment, but would like an earlier or more convenient time if one becomes free. On other occasions the customer may be unable to attend their appointment and need to reschedule for a later time. In either case the appointment should be **Wait-listed**.

Events

An **event** takes up a time-slot in the **calendar**, but does not involve a customer. It can involve either a Personnel, or a Location, or both.

E.g. A meeting, Lunch break, etc.

Events are similar to **appointments**. They can be used to allocate a time-slot in the **calendar**, and as such prevent appointments from being booked into those time-slots for that Personnel or Location.

Events can be used for a variety of reasons, such as...

- Meetings.
- Scheduled breaks (e.g. Lunch).
- Other personal time.

You can use an event to block off timeslots for a Personnel (for example they are out of the office), for a Location (for example the room is being used by a third-party), or for both (for example the room is being used by a Personnel, but not for an appointment).

For details on how to book an event see [Creating an Event](#).

Note: If a member of personnel has a fixed lunch break then it is more convenient to simply set their **working hours** to handle this.

Tasks

A **task** keeps track of something that needs to be done.

To-do Lists

Your to-do lists are displayed on the **Home** page. Tasks can be quickly marked as completed just by ticking the check-box, or you can edit the task by clicking on the link.

(You can also browse and search for tasks)

General to-do

A **general to-do** is a task which could be completed by any user. These tasks appear in the to-do list on every user's Home page.

To create a general to-do, you fill in the Description and optionally the Due Date, but leave the User as "(not specified)".

Personal to-do

A **personal to-do** is a task which should be completed by a specified user. These tasks appear in the to-do list on that user's Home page.

To create a personal to-do, you fill in the Description and the User, and optionally the Due Date.

Calendar Synchronisation

The Calendar Synchronisation feature allows you to synchronise your Appointments, Events, and Tasks from BizDiary to other Calendars such as the Calendar on your iPad, or for Thunderbird, or any other calendar that supports the iCalendar format.

Additional information about setting up Calendar synchronisation can be found in the website FAQ.

Customers

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

Customer details

BizDiary allows you to enter a lot of information about your customers. While much of it is optional, we strongly recommend that you enter as much detail as possible.

Customer Code

The **Code** field is available for you to use as you like. Many businesses have an accounting or other filing system which record a code for each customer. By filling in this field you can make it much easier to bring the two sources of data together.

Mobile phone and Email

By including a mobile phone number, you can send SMS messages to the customer either automatically or manually as needed. Similarly by including an email address, email notifications can also be sent to the customer.

Keeping your customers informed is the best way of keeping your customers.

Some customers may not want these reminders sent, or you may want to restrict these features to only certain customers, but it still may be useful to have their email and mobile number recorded for other purposes. To allow this you can control the customers **Messaging Preferences** on the **Preferences** tab.

Notes

The **notes** field allows you to enter specific notes about the customer. These notes are not visible to the customer.

Alerts

The **alerts** field is similar to notes, but allows you to track important issues that need to be flagged when a customer is booking an appointment.

Some uses include tracking customers who have unpaid bills, or customers who may have special needs that must be considered when booking an appointment.

Whenever an Appointment is saved (either New or Edited), then the Alerts field is checked. If there is text there then the Alert is displayed as a warning.

The Alerts also show in the Customer Browse and Search Results (truncated if necessary).

For details on how to create an customer see [Creating a new Customer \(from the menu\)](#).

Receipts

BizDiary provides a basic receipting function. This is not intended as a replacement for a book-keeping system, but can provide a quick and easy way of producing receipts, especially in situations where some users may need to provide a receipt to a customer, but do not have access to the business' accounting system.

Most of the time you will create a receipt from an appointment, as this allows the system to pre-fill most of the receipt based on information in the appointment.

You can also create a receipt from the menu, in which case you will need to choose a customer to link to the receipt.

The receipts allow up to five lines for items, and you can also add payment information.

Each Personnel and Customer record can have special information added to appear on the receipt. For Personnel this is useful for including fixed details such as a provider number. For Customers it may be used for information such as the referring physician (for example).

The information that appears in the footer area of the receipt is as follows...

1. Standard Receipt Information (from Account > Settings).
2. Personnel-specific receipt info (if any).
3. Customer-specific receipt info (if any).
4. Receipt comment (if any).

Personnel, Services and Locations

As well as **Customers**, the other key parts to an appointment are the **Personnel**, **Services** and **Locations**.

When creating appointments you need to know not only who the appointment is for (the Customer) and when it will take place, but also the service that will be provided, the person who will provide the service, and the location where the appointment will take place.

Depending on the level of account you hold you will be able to set-up a number of Personnel, Locations and Services.

Smaller business may only require a single personnel and location, but will probably still offer multiple services. Whenever only a single option exists for any of these, the system will automatically default to it.

Personnel, Service and Location records can be created from the menu.

E.g. To create a new Service, select **Services > New Service**

Personnel, Service and Location records can also be viewed, edited, and deleted from the Browse and Search screens.

For more details see the [BizDiary Administrator Guide](#).

Account

The **Account** menu provides access to various administration functions, such as changing settings and buying SMS credits. These are detailed in the [BizDiary Administrator Guide](#).

The Toolbox

The Toolbox menu provides access to My Notes, Settings, SMS functions, and additional options.

My Notes

The **My Notes** page is a simple place to make personal notes. These notes are only visible to the user who made them, and offer a quick and easy way to keep track of things that might otherwise be scribbled onto a piece of note-paper.

Show Hints

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

These hints are great when starting out, but as you become more familiar with the system you may want to turn them off.

Turning your hints on and off is as simple as clicking the **Show Hints** check-box under the **Tools** menu.

The setting only applies to the current user and does not affect the appearance of hints for other users.

Send SMS

SMS messages can be sent from various parts of the system such as appointments, customers, and personnel, but sometimes you may want to make use of the SMS messaging to send a quick message to someone else.

A quick SMS can be sent to a phone number, by selecting **Toolbox > Send SMS**.

Admin and Manager level users can also send a Bulk SMS.

The **Send SMS** window opens where you can type in the mobile number to send the message to, and the message text. For more details see [Sending SMS messages](#).

Mail-out

The mail-out feature is discussed in detail in the [Mailing Lists](#) chapter.

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.

Creating a new Customer (from the menu)

Customers are the core of any business.

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
... *OR* ...
in the **Browse Customers** screen click the **[new]** button.
- Step 2:** Enter the Customer's **First Name** and **Last Name** (you can also set an optional **Title**).
- Step 3:** Enter **phone numbers** and a **fax number** (optional).
(If you want to use integrated SMS, you must fill in the mobile number).
- Step 4:** (*optional*) Enter an **email address** if available. Email provides an efficient and cost-effective means of communicating with your customers.

The email blocked and block reason, are used by the system if it detects a problem.
- Step 5:** (*optional*) Enter **company** and **address** details.
- Step 6:** (*optional*) Enter additional information, such as **Primary Personnel**, **Status**, **Code** (E.g. A customer/file number), **Date of Birth** and **Gender**.
- Step 7:** (*optional*) Add **referral information**.
- Step 8:** (*optional*) Click the **Preferences** tab and set the customers messaging preferences.
- Step 9:** (*optional*) Click the **Receipts** tab to add specific information that will appear on any receipts for this customer.
- Step 10:** (*optional*) Click the **Alerts / Notes** tab and add alerts or notes if needed.
- Step 11:** 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.

Booking an Appointment

Follow these simple steps to book an appointment...

Step 1: Open one of the calendar views. e.g. **Calendar > Weekly view**.

Step 2: Click an available timeslot, and select **New Appointment** from the pop-up menu.

Step 3: Select a **customer** using the customer selector [...].

OR Use the **quick add** button **[+]**, to add the basic details.
It is recommended that you later go back and complete the full customer details.

Step 4: Select the required **service**. The system automatically restricts the **personnel** and **location** according to the selection and sets the default **duration**.

Step 5: Select **personnel** and **location** using the drop-down lists.

Step 6: Check the **date** and the **from** time.

Step 7: Check the **to** time and **duration**.

The system keeps the **from** and **to** times and **duration** synchronised.

Step 8: Select the **status** (see below).

Step 9: *(optional)* Add any **notes** if needed.

Step 10: *(optional)* Mark as **wait-listed** and add **wait-list notes** if needed.

Step 11: 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 and are valid, and that the appointment does not clash with existing appointments or events.

Appointment Status

The appointment status changes over the lifetime of the appointment.

Unconfirmed: Initial status of an appointment.

Reminded: A customer has been sent a reminder by Email or SMS.
You might also change the status to **Reminded** if, for example, you call them and leave a message.

Confirmed: The customer is definitely attending the appointment. You would normally set this status after speaking to the customer just a day or two before the appointment.

No Show: The customer missed the appointment for some reason.

Cancelled: The appointment was cancelled. A cancelled appointment no longer shows in the calendar, but can be found through Appointment Search and in Reports.

See also [Appendix C: Using the Customer Selector](#) and [Appendix D: Quick Customer Add](#).

Recurring Appointments

A recurring appointment is an appointment that happens two or more times (maximum 52) on a regular basis, which may be specified as a number of days or weeks.

Booking a Recurring Appointment

Booking a recurring appointment is almost identical to booking a normal appointment except that you tell the system how many appointments you want to create.

You can do this when creating a new appointment, or by editing an existing appointment. Just fill in the fields on the **Recurring** tab.

When you click [**Save**] the appointment that you are creating or editing will be checked for errors, then each additional appointment will also be checked. Once everything is validated the records will be saved.

Important Notes

- Recurring appointments are not permitted outside of normal hours for the Location and Personnel. Unlike normal appointments this restriction cannot be ignored.
- If any recurring appointment clashes with an existing appointment or event, a warning is given. If the warning is ignored then the appointment(s) that clash will be created on the Wait-list, marked as Reschedule.
- You cannot create recurring appointments from a Cancelled or Wait-list Reschedule appointment.
- Recurring appointments are always created with a status of "Unconfirmed". Only the initial appointment will use the status specified.
- Recurring appointments are always created with "Sent SMS" and "Sent Email" unchecked. Only the initial appointment will use the values specified.
- Notes from the initial appointment ARE copied over to the additional appointments.
- Once created recurring appointments are just like any other appointment. No record is kept of the fact that they are a recurrence. If changes need to be made then you must change each appointment separately OR delete them and recreate.
- Similarly, deleting any of the recurring appointments (even the initial appointment) has no effect on the other appointments.

Creating an Event

Follow these simple steps to create a scheduled event...

- Step 1:** Open one of the Calendar views. e.g. **Calendar > Weekly view**.
- Step 2:** Choose the **By Personnel** tab, and select the person from the drop down list.
- Step 3:** Locate an available timeslot, click and select **New Event** from the pop-up menu.
- Step 4:** Enter a **Description** of the event.
- Step 5:** Select **Personnel** and/or **Location** using the drop-down lists.
- Step 6:** Check the **date** and **time**.
- Step 7:** Enter the **duration** (in minutes).
- Step 8:** *(optional)* Click the **Notes** tab and add any notes if needed.
- Step 9:** Recheck all the values on the form and then click the **[Save]** button.

When you click **[Save]** the system will check to ensure that all the required fields have been entered, and that the event does not clash with existing appointments or other events.

Events can only be created for personnel, NOT locations.

Recurring Events

A recurring event is an event that happens two or more times (maximum 52) on a regular basis, which may be specified as a number of days or weeks.

Creating a Recurring Event

Creating a recurring event is almost identical to creating a normal event except that you tell the system how many events you want to create.

You can do this when creating a new event, or by editing an existing event. Just fill in the fields on the **Recurring** tab.

When you click [**Save**] the event that you are creating or editing will be checked for errors, then each additional event will also be checked. Once everything is validated the records will be saved.

Important Notes

- If any recurring event clashes with an existing appointment or event, a warning is given. If the warning is ignored then the event(s) that clash will NOT be created, but the others will.
- Notes from the initial event ARE copied over to the additional events.
- Once created recurring events are just like any other event. No record is kept of the fact that they are a recurrence. If changes need to be made then you must change each event separately OR delete them and recreate.
- Similarly, deleting any of the recurring events (even the initial event) has no effect on the other events.

Setting a Task

Follow these simple steps to create a task...

- Step 1:** From the menu select **Task > New Task**.
- Step 2:** *(optional)* Select a **User** using the drop-down list.
- Step 3:** *(optional)* Select a **Customer** using the customer selector ().
- Step 4:** *(optional)* Enter the **Due Date**.
- Step 5:** Select the **Status** (initially "Incomplete").
- Step 6:** *(optional)* Click the **Notes** tab and add any notes if needed.
- Step 7:** Recheck all the values on the form and then click the **[Save]** button.

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

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.

Acceptable Passwords

To protect you, and your data, it is important that you select a password that cannot be easily guessed by another person.

To ensure a degree of security your password **MUST**...

- Be at least 8 characters long.
- Include both uppercase (A-Z) and lowercase (a-z) letters.
- Include at least one digit (0-9).

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.

Advanced Calendar Topics

Moving an Appointment or Event

Using **Cut** and **Paste**, Appointments and Events can be moved to a new time-slot and even to a different Personnel or Location.

Follow these steps to **move** an appointment or event...

- Step 1:** Open one of the Calendar views. e.g. **Calendar > Weekly view**.
- Step 2:** Click on the **Appointment** or **Event** to open the menu, and select **Cut**.
(The item remains where it is until Pasted).
- Step 3:** Find an empty time-slot in the Calendar, click to open the menu, and select **Paste**.

When you paste an appointment or event, all the same checks are made as when editing or creating a new item. As in these cases, certain warnings can be ignored.

When an appointment or event is cut to the clipboard it remains there until either a new item is placed on the clipboard OR to the end of the log-in session. This means that you can cut or copy an item, and even if you go to other parts of the system it will still be on the clipboard when you come back to the calendar.

For simple changes, like shifting an appointment by half an hour, it may be more convenient to simply edit the appointment and change the time.

Copying an Appointment or Event

Using **Copy** and **Paste**, Appointments and Events can be copied to a new time-slot and even to a different Personnel or Location.

Follow these steps to **copy** an appointment or event...

- Step 1:** Open one of the Calendar views. e.g. **Calendar > Weekly view**.
- Step 2:** Click on the **Appointment** or **Event** to open the menu, and select **Copy**.
- Step 3:** Find an empty time-slot in the Calendar, click to open the menu, and select **Paste**.
- Step 4:** If desired, additional copies can be made by pasting again. It is not necessary to redo the Copy step.

When you paste an appointment or event, all the same checks are made as when editing or creating a new item. As in these cases, certain warnings can be ignored.

When an appointment or event is copied to the clipboard it remains there until either a new item is placed on the clipboard OR to the end of the log-in session. This means that you can cut or copy an item, and even if you go to other parts of the system it will still be on the clipboard when you come back to the calendar.

Appointment Wait-list

After booking an appointment, a customer may find that their available time has changed making it difficult or impossible to attend their original appointment time.

Prefer New Time

If the customer would prefer an alternate time but will still come to the existing appointment if a new time cannot be found, then the appointment should be marked as **Prefer New Time**.

These appointments stay in the calendar, to be moved if a suitable timeslot becomes free.

Reschedule

If the customer can not come to their scheduled appointment, but would still like an appointment at a different time, then the appointment should be marked as **Reschedule**.

These appointments no longer takes up space in the calendar.

Wait-list Notes

Alternate times should be recorded in the Wait-list Notes. This free-form field, lets you type whatever you want.

Example:

Would prefer Monday 25 Feb between 2pm and 5pm.

WL Since

This field allows you to record the date that a person went onto the wait-list. This may be used for prioritising who to give an appointment to if a new time opens up.

Viewing the wait-list

The Home page has a link to the wait-list, which can also be accessed through the **Appointments** menu.

To group together the **Prefer New** appointments and the **Reschedule** appointments, click on the **Wait-list** column heading.

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.

For greater control over the message text some businesses choose to manage all of their messaging manually.

The system also facilitates the sending of other messages and email, by providing quick links wherever a mobile phone number or an email address is available.

Automatic Reminders

Automatic reminders are sent to customers prior to their appointment. Whether and when these reminders are sent depend on a number of settings, customer preferences, and the current state of the appointment.

More details can be found in the [BizDiary Administrator Guide](#).

Sending SMS messages

BizDiary allows users to send SMS messages (depending on their *Permissions*). These can be sent automatically to remind customers of their appointment times, or manually as required.

The **Send SMS** dialog has the following fields...

- Sender:** Phone number or text id. Shows as sender on the recipient's phone.
Set by the administrator, cannot be edited.
- Send to:** Phone number that the message will be sent to.
- Message:** Enter or edit the message.

The text below the message shows how many SMS credits which will be used.

General SMS

You can send an SMS to any phone number by selecting **Send SMS** from the **Toolbox menu**.

SMS to Customer or Personnel

You can send an SMS to a customer or member of personnel. Open the record and click [**Send SMS**], or in the browse or search simply click on the mobile phone number.

Manual SMS Appointment Confirmation

From the Calendar, or an open Appointment, you can send an SMS. "Send to" is the customer's mobile number (if available). "Message" is prefilled (template maintained by admin).

Automatic SMS Appointment Confirmation

If **SMS Appt. Reminder** is turned on in the Settings, then SMS reminders will automatically be sent to customers at the configured time.

Messages will only be sent to customers who have a **mobile phone number** AND have **Send SMS Reminders** turned on.

Bulk SMS

As well as sending an SMS to a single recipient, Administrators and other user with the *Bulk SMS* permission can send a bulk SMS.

A Bulk SMS consists of a list of recipients and a single message that is sent to them all. The list of recipients can come from your Customers, Personnel, or pasted in from an external list.

Sending to Customers

You can send an SMS to all your customers (with valid mobile numbers), or to just those that match a certain search criteria.

Admins and Managers will see an extra **Bulk SMS** link at the bottom of the **Customer Browse** and **Customer Search Results**. If you click this link, the **Send SMS** window opens with the **Send to** field filled with all the mobile numbers.

Enter the desired message. You will see details below the **message** box showing the length of the message and the total number of credits that will be used.

When you are happy with the message, press **[send]**.

Sending to Personnel

If you need to quickly contact all your Personnel, SMS is a fast and efficient way to do it.

Sending to Personnel is just like sending to customers. You either browse or search your Personnel, and then click the **Bulk SMS** link as before.

Sending to Anyone

Sometimes it's hard to get exactly the list of Customers that you want with a search, but you may have a list of the people you need to contact in Excel – maybe from a list you exported from BizDiary and then made adjustments.

You can send an SMS to any list of mobile numbers by going to **Toolbox > Send SMS**, and pasting your list of numbers into the **Send to** field.

Spam

It is your responsibility to make sure you comply with applicable laws relating to unsolicited messages.

For existing customers, it may be reasonable to assume there is implied consent for you to send them messages, but you must also comply with any request to stop sending such messages.

If a customer contacts you and says they do not want to receive promotional SMS messages, you should edit their **Customer** record, go to the **Preferences** tab and uncheck **Bulk SMS**.

Note: The **Bulk SMS** preference only affects bulk messages. Turning it off will not stop appointment notifications, and it will not prevent you from sending a message to that person as a single message.

The system will also automatically respond to a reply containing just the word "STOP". If the system receives this message, it will look for a matching Customer and turn off the **Bulk SMS** preference.

Mailing Lists

The Mail-out Feature

The **Mail-out** feature allows you to send email messages to your customers using your normal email program. To use this feature you must be an *Administrator* or have the *Send Mailout* permission

BizDiary provides some basic mailing list features to allow you to send information such as newsletters, promotions or general email to your customers.

Mail-out Types

There are three different mail-out types, **General**, **Newsletter**, or **Promotion**. You can use each type in whatever way you see fit, but here are some recommendations...

Newsletter: Great for sending a regular newsletter to your customers.

Promotion: Use this to let your customers know about any special offers you are giving.

General: Use this for other general emails that you want to send to all your customers.

When you create or edit a customer record, you can choose whether they will receive each type of email.

Creating a Mail-out

Step 1: Select **Toolbox > Mail-out** from the menu.

Select the type of mail-out you want to send, and then click the button.

Step 2:

A new email message will open in you default email program.

Enter a subject for your email, and then create the email as you would normally, adding whatever text, graphics and attachments you wish.

Step 3:

DO NOT change the "To:" field. This contains a special key used by the system to identify your email and send it to the appropriate recipients.

Send your email.

Step 4: You must send your email within 24 hours of creation or the key will expire. Each key can only be used once.

Customer opt-out

Each customer has a setting in their preferences determining whether they receive each type of email. If a customer asks to be removed from future emails you should change their preferences. There is no automatic unsubscribe feature.

Reports

Running Reports

A variety of reports are available in BizDiary to provide useful information about Appointments, Customers, SMS messaging, and for Invoices. Users with the *Reports* permission can run reports.

Reports are produced in either PDF format or Excel format.

Select a report

On the right of the work area is a list of available reports. The icon indicates the type of report produced.

Enter parameters

When you click on the report, the parameter form is shown allowing you to select a range of information to include in the report.

You can enter or select parameters in much the same way that you would in the Search form.

If a field is left blank, the report will allow any value for that field. Otherwise the report looks for a combination that meets ALL the entered values.

You can select multiple options from a list by holding down the [Ctrl] key when you click.

Output options

Click on the **Output** tab to change output options.

Options include a subtitle, sort order, and paper size, as well as additional report specific options.

The **subtitle** can be a useful way of describing the contents of the report for later reference.

Run the Report

To run the report click on the **[Run]** button.

For PDF reports, the PDF will open in a separate browser window. From there you can view the report, save a copy, print, etc. When you have finished with the report you should close the browser window.

For Excel reports, your browser will give you the option to either **Open** or **Save**. Although **Open** is convenient, we recommend choosing the **Save** option, as you can control **where** the file is saved. With **Open**, the file is usually downloaded to a temporary location, and can be difficult to find later.

Available Reports

The following reports are available in BizDiary.

Acct: Invoices	Only available to administrators. Does not apply to managed accounts. Provides access to downloadable invoices for all PayPal payments.
Appts: Cancellation Summary	Shows a monthly summary of how many cancellations occurred for each cancellation reason.
Appts: Detail	A detailed appointment report, with full appointment details and extended customer information.
Appts: Detailed Review	An Excel report to export appointment information. Includes common appointment information, plus added Customer details including Referral fields, and previous/next appointments.
Appts: New/Changed	A summary of appointments that have been created or modified on a specific day or across a range of days.
Appts: Personnel Summary	A summary of the total number of appointments and total duration of appointments by Personnel within a given date range.
Appts: Personnel Work Hours	A summary of appointment hours by day for each Personnel within a given date range.
Appts: Summary	A summary of appointments, with date/time, customer details, service, location, personnel, status and notes (approx. 8/page).
Custs: Appointment Review	Reports on customers who have had an appointment previously, but have not had one recently.
Custs: Birthdays	List of customers with birthdays within the specified range.
Custs: Summary	A summary of customer details, including contact details.
Custs: Referral Summary	Monthly summary of the number of customers generated from different sources.
Custs: Personnel Seen	This report lists customers according to any Personnel that they have had an appointment with. It includes the number of appointments, the total hours, and the date and time of the first and last appointment.
Custs: Services Used	This report lists customers according to the Services which they have used. It includes the number of appointments, and the total hours.
SMS msgs: Details	Full details of SMS messages, including text of message and reply.
SMS msgs: Summary	A summary of SMS usage. Shows the number of messages sent and number of credits used within a given date range.
Users: Log-in Report	Only available to administrators. Shows date/times of user logins. Login data is only retained for a period of 60 days.

Scheduled Reports

Certain reports can be scheduled to be run and delivered via email on a regular basis. You must be a Manager or Administrator to set up Scheduled Reports.

(See the [BizDiary Administrator Guide](#) for more details).

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. <i>E.g.</i> 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: Using the Customer Selector

The customer selector

The customer selector provides a quick and easy way to select a customer. It is used whenever booking appointments.

It is also used during set-up to associate a customer with a user record.

Selecting a customer

To select a customer, click the selector button [...].

A dialog appears under the **customer** field.

When you start to type the name of a customer the list below will show any matches.

You can type part of either the **First Name** or the **Last Name**, or part of each, or even just initials.

Some examples...

Sta Will find all customers whose first or last name begins with "Sta".
E.g. Stan Marsh, or Emma Stanton.

Reg Br Finds customers whose first name begins with "Reg" and last name begins with "Br".
E.g. Regan Braun, or Regina Brown.

C H Lists customers whose first name begins with "C" and last name begins with "H".
E.g. Chelsea Howell, or Craig Hammond.

To **select** from the list click with desired item.

To quickly select the top item just press the **[Enter]** key - Very useful when there is only one match!

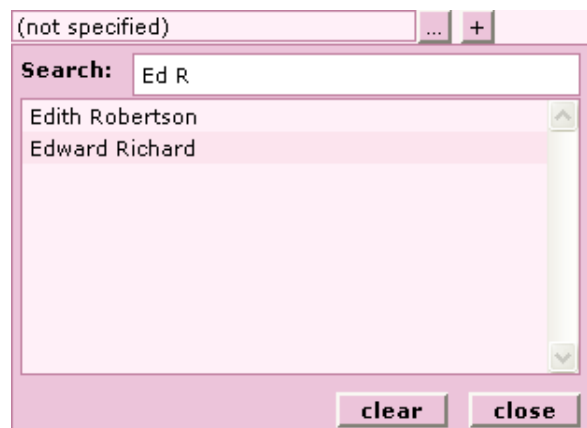
Example:

In the figure below, the user has entered "Ed R" in the Search box of the customer selector. The selector had listed all names where the first name begins with "Ed" and the last name begins with "R".

Pressing the **[Enter]** key at this point would select "Edith Robertson".

If "Edward Richard" was the desired customer, he could be selected by clicking on the entry.

Or by typing "i" (making the entry "Ed Ri"), so that the list would just list "Edward Richard", and then pressing **[Enter]**.



Clearing the Customer field

To **clear** the selected customer open the customer selector and click on the **[clear]** button.

Appendix D: Quick Customer Add

The **Quick Customer Add** dialog gives you a quick way to add a new customer directly from an **appointment** form.

When a new customer rings wanting an appointment it can be frustrating to have to go into the Customer area, add the customer and then come back to the appointment, especially as the customer may only want to book if a suitable time is available.

The **quick add** feature allows you to go straight into booking the appointment time, and only needs the minimal fields for the customer (First/Last Name and a phone number).

Once the appointment has been booked, we recommend that you then go and add extra details for the customer.



The screenshot shows a dialog box titled "Quick Customer Add" with a light green background. It contains several input fields and two buttons. The fields are: "*First name:" with the value "John", "*Last name:" with the value "Kirkwood", "*Phone(day):" (empty), "*Phone(a/h):" (empty), "*Phone(mob):" with the value "0444555666", and "Email:" (empty). At the bottom right, there are two buttons: "Add" and "Cancel".

Field	Value
*First name:	John
*Last name:	Kirkwood
*Phone(day):	
*Phone(a/h):	
*Phone(mob):	0444555666
Email:	