

2. Appointment Booking User Guides

Thank you for purchasing our extension. If you have any question that is beyond the scope of this document, do not hesitate to leave us an email.

Created: 20/09/2016 | By: Magenest | Support Portal: <http://servicedesk.izsync.com/servicedesk/customer/portal/40>

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Introduction

Magento 2 Appointment Booking extension by Magenest is a solution for service providers, travel agency,... to efficiently manage bookings and reservations on Magento 2 store.

Features

- The booking system is implemented, it will automatically send an email to customers according to the status.
- The booking system supports multiple currencies.
- Admin can easily create special date price rule, recurring price rule, and staff price rule for products.
- Admin can also create schedule for individual product assigned to a staff.
- Admin can define a staff's category and assign a plus of price when the staff is chosen.
- Admin can define special dates to better evaluate products during unique occasions.
- Admin can view booked appointments in Grid mode, Full Calendar mode or sync to their Google Calendar.
- Admin can define default booking status for newly ordered products.
- Admin can assign a template email for a booking status on Configuration.
- Customer can send a cancel request to their booked appointments within a click.
- Customer can easily choose available time range within their chosen day and a available staff.
- Customer now can add many staffs in many time intervals in front end.
- Customer can steal booking product from the other customer cart.



System Requirements

Your store should be running on Magento Community Edition version **2.1.x., 2.2.x**

Initial Configuration

Order Configuration

Go to **Store > Configuration > Appointment Booking > Order Configuration**, you can choose email sender as well as email template for emails sent to customers and staffs whenever the booking order status is changed.

GENERAL

CATALOG

CUSTOMERS

SALES

APPOINTMENT BOOKING

Google Calendar

Order Configuration

SERVICES

ADVANCED

Order Configuration

Default Order Status

Unconfirmed

[GLOBAL]

Define default status for new-placed orders

Email Sender

General Contact

[GLOBAL]

Template Configuration

Confirmed

Booking Confirmed

[GLOBAL]

Select email template for confirmed orders

Cancelled

Booking Cancelled

[GLOBAL]

Select email template for cancelled orders

Unconfirmed

Booking Unconfirmed

[GLOBAL]

Select email template for unconfirmed orders

- **Default Order Status:** specify the default status of newly placed booking orders.
- **Email Sender:** specify the identification of the sender.
- **Template Configuration:** email templates for each booking status of an order. You can create email templates using HTML in **Marketing > Email Templates**

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Email Templates

Search

Reset Filter

3 records found

20 per page

1 of 1

Add New Template

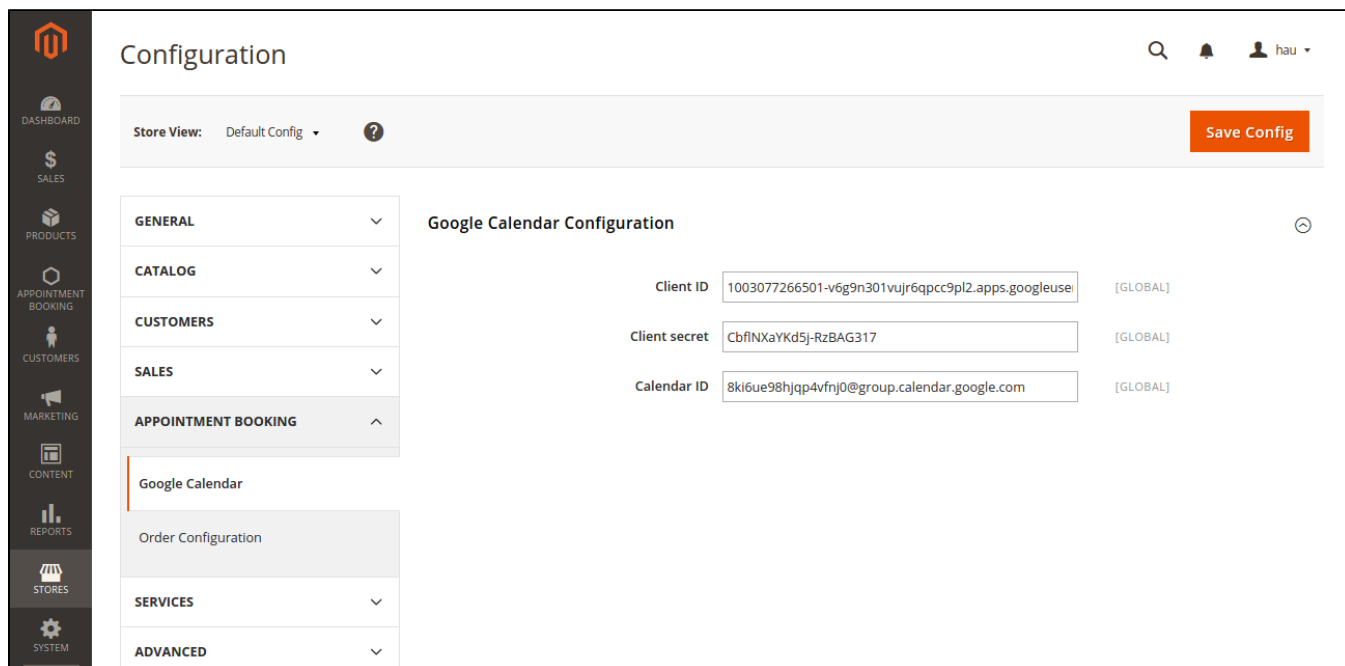
ID	Template	Added	Updated	Subject	Template Type	Action
		From To	From To			
1	Confirmed	Mar 24, 2017, 2:21:04 AM	Mar 24, 2017, 2:21:04 AM	Confirmed	HTML	Preview
2	UnConfirmed	Mar 24, 2017, 2:21:20 AM	Mar 24, 2017, 2:21:20 AM	UnConfirmed	HTML	Preview
3	Canceled	Mar 24, 2017, 2:21:31 AM	Mar 24, 2017, 2:21:31 AM	Canceled	HTML	Preview

Here are some template variables that you can embed in your template:

- customer: customer email
- customerName: customer name
- store: store name
- itemName: name of the ordered item
- bookingStatus: new booking status of the item
- specialDate: will be available if there is any special date
- bookedDate: booked date
- start: start time
- end: end time
- staffName: staff name

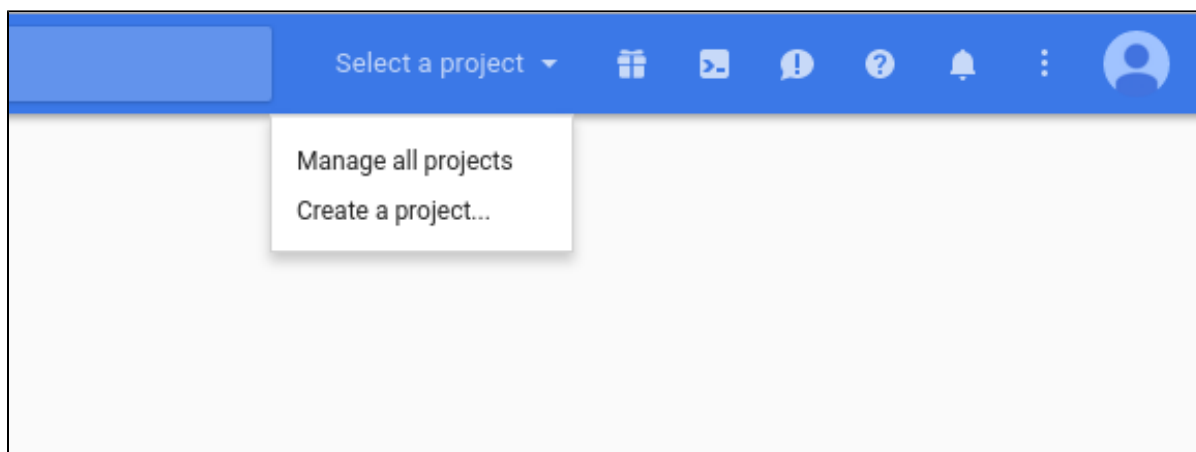
Google Calendar

If you want to synchronize booking orders from Magento 2 to your Google Calendar account, you must have 3 keys (client_id, client_secret, calendar_id). These three keys must be created from only one google account. On the left menu bar, go to **Stores> Configuration > Appointment Booking > Google Calendar**.



The screenshot shows the Magento 2 Configuration interface. On the left is a vertical sidebar with icons for Dashboard, Sales, Products, Appointment Booking, Customers, Marketing, Content, Reports, Stores, and System. The 'Appointment Booking' section is expanded, showing 'Google Calendar' as the selected option. The main content area is titled 'Google Calendar Configuration'. It features a 'Store View' dropdown set to 'Default Config' and a 'Save Config' button. Below this, there are three input fields: 'Client ID' with the value '1003077266501-v6g9n301vujr6qpc9pl2.apps.googleusei', 'Client secret' with 'CbflNXaYKd5j-RzBAG317', and 'Calendar ID' with '8ki6ue98hjq4vfnj0@group.calendar.google.com'. Each field has a '[GLOBAL]' label to its right. A 'Google Calendar' section is also visible, containing an 'Order Configuration' option.

When it comes to getting these parameters, things get a bit tricky. First off, in order to get Client ID and Client Secret, go to [Google Developer Console](#) and create a new project by clicking on **Select a project > Create a project**



Enter your project title and click on **Create**

New Project

Project name ?

Appointment Booking

Your project ID will be appointment-booking-1239 ? [Edit](#)

[Show advanced options...](#)

Create

Cancel

Next, click on **Enable and Manage APIs**, you will be taken to the API Manager page. Click on **Credential** tab of the page and select **OAuth Consent Screen** and enter Product Name.

Google Developers Console

Appointment Booking

API

Credentials

Credentials OAuth consent screen Domain verification

Email address ?

qhauict13@gmail.com

Product name shown to users

Appointment Booking

Homepage URL (Optional)


http://localhost

Product logo URL (Optional) ?

http://www.example.com/logo.png

This is how your logo will look to end users
Max size: 120x120 px

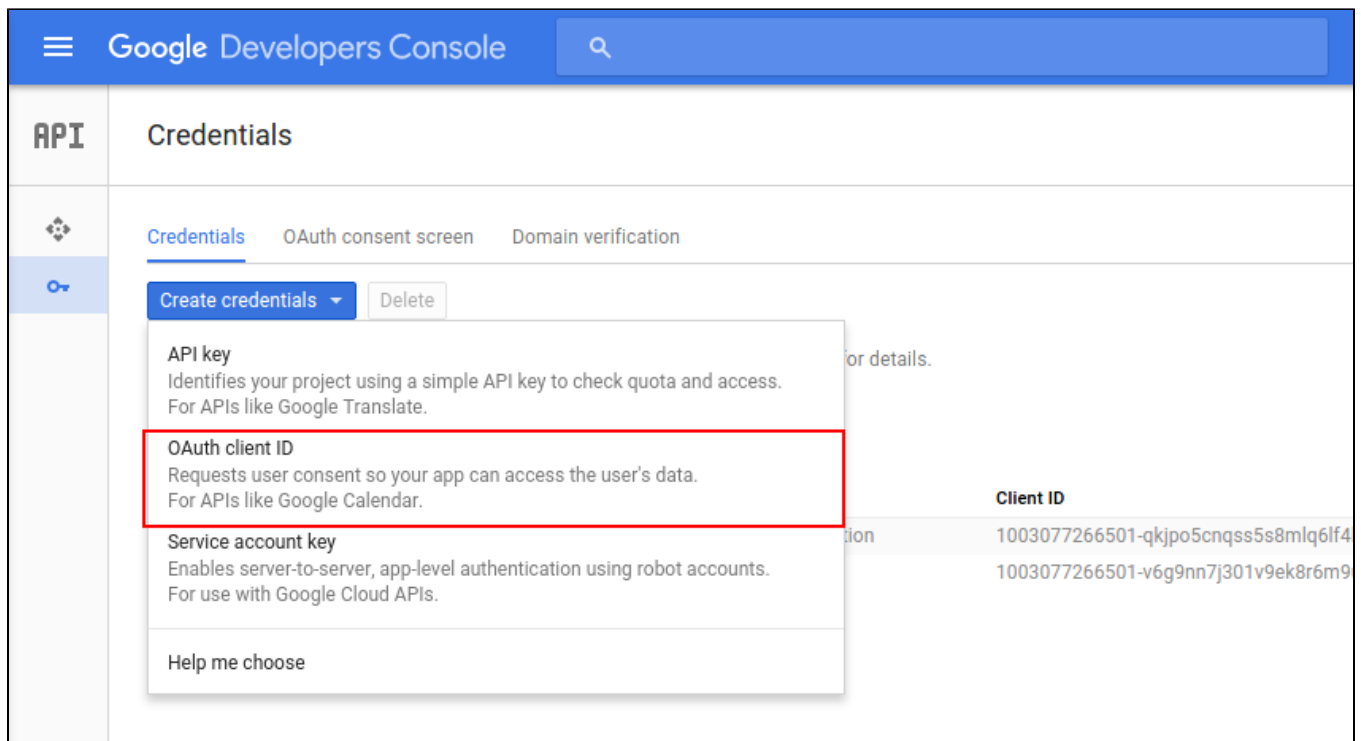
Privacy policy URL (Optional)



The consent screen will be shown to users whenever you request access to their private data using your client ID. It will be shown for all applications registered in this project.

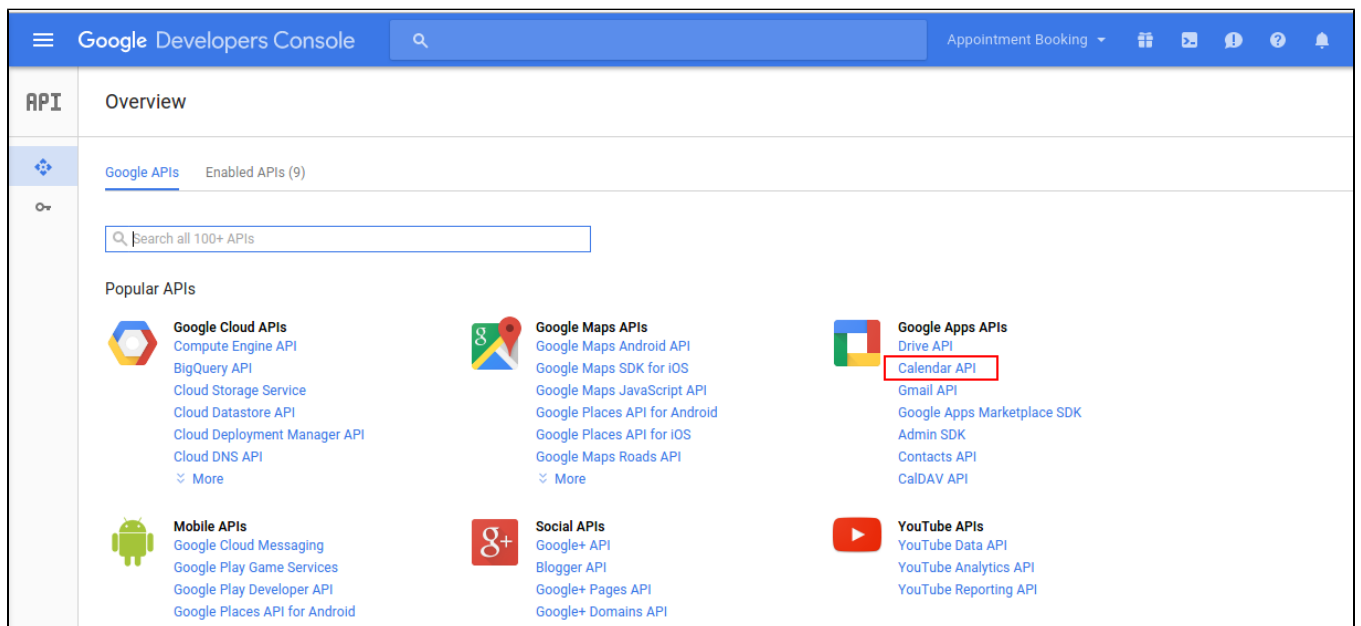
You must provide an email address and product name for OAuth to work.

Click on **Save**, now you will be able to create Credentials for your project. Select **Credentials**, click on **Create credentials > OAuth client ID**

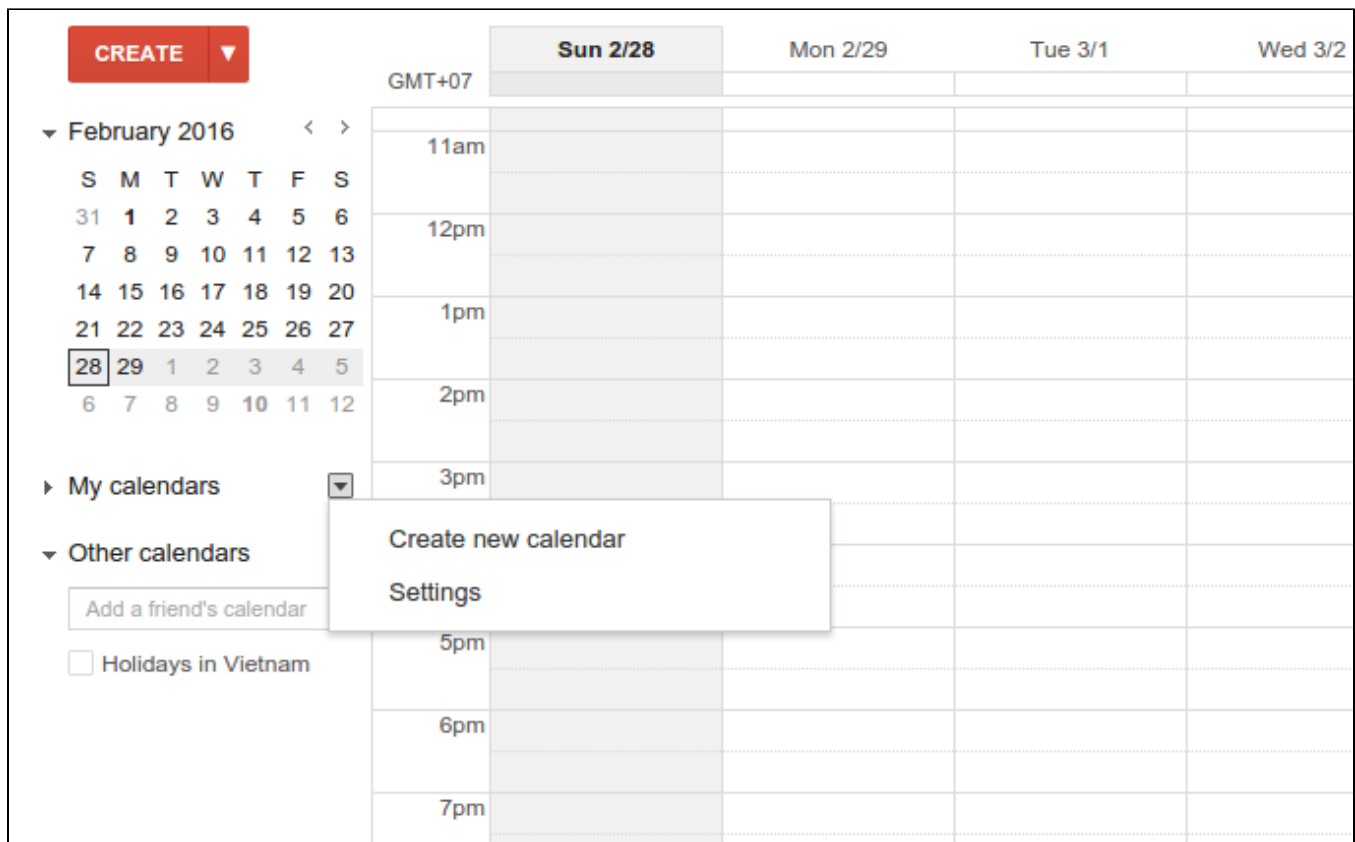


Remember to tick the **Other** box in **Application type** and enter the name of your project, then click **Create**. You will be immediately informed of your Client ID and Client secret keys.

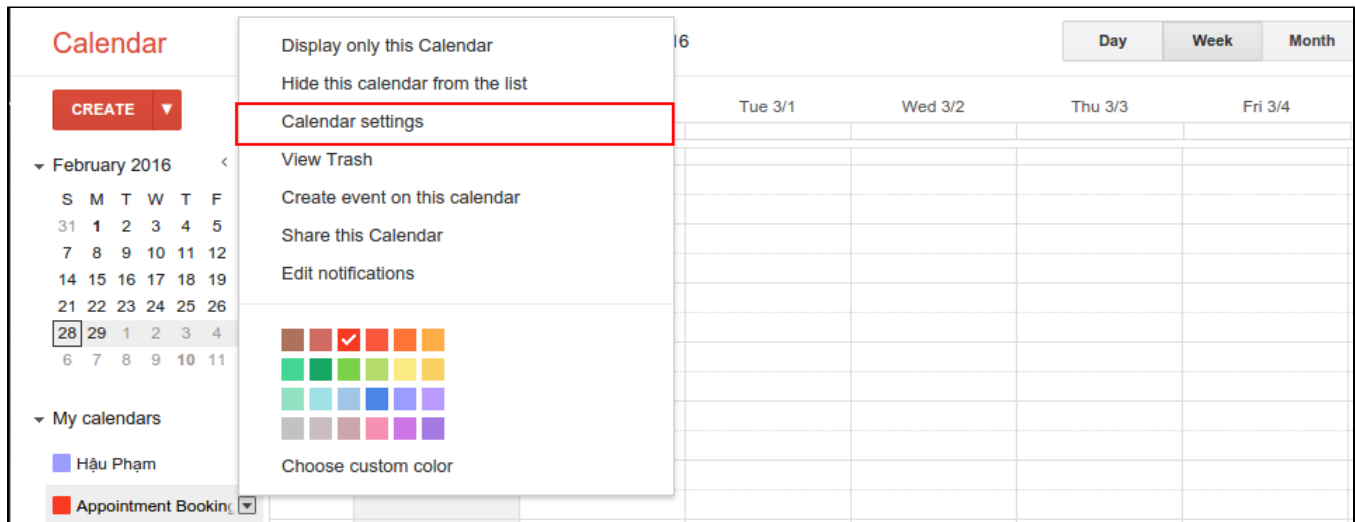
Now go to **Overview** tab, select **Calendar API** and enable the API.



Go to your **Google Calendar** and create a new calendar.



Fill in the inputs with your desired information for the calendar and click on **Save Calendar**. Then go to the settings page of your calendar.



Scroll to the bottom of the page, you should be able to see the **Calendar Address** section and get the Calendar ID.

Price Rules

We have implemented 3 kinds of price rules: **Staff Price Rules**, **Special Date Price Rules** and **Recurring Price Rules**. These rules will add versatility to the effort of better evaluating price of bookings.

With Staff Price Rules, go to **Staff Price Rules** tab in **Appointment Booking** menu.

In the table, you can see all price rules that have been set. Add a new one by clicking on **Add New Staff Rule** button.

Appointment Staff Price Rules

[Add New Staff Rule](#)

Search by keyword

Filters Default View Columns Export

Actions 3 records found

20 per page 1 of 1

Actions	Staff Rule Name	Staff Rule Amount	Action
<input type="checkbox"/>	Newbie	122.00	Edit
<input type="checkbox"/>	Professor	132.00	Edit
<input type="checkbox"/>	3+ year experience	300.00	Edit

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Edit Price Rule

Search [Report Bugs](#) appointment

[Back](#) [Reset](#) [Save and Continue Edit](#) [Save Rule](#)

PRICE RULE CONFIGURATION

Staff Price Rule

Rule Name *

Added Amount *

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Added Amount : When the staff with the expertise is chosen, a corresponding amount will be added to the basic total price (we will illustrate this in a later section). We recommend you to add a default type with Rule Amount set to 0 to prevent any abnormal functionality of the extension. Normally, the more experienced the staff, the higher payment he gets.

Then we have **Special Date Amount**, which will add or subtract a certain amount of money when a certain date is selected.

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Special Date Price Rules

Add New Special Date

Filters

Default View

Columns

Export

Actions

2 records found

20 per page

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	Event Name	From Time	To Time	Date Option	Amount	Action
<input type="checkbox"/>	Christmas day	2016/09/12 06:32:15 AM	2016/09/30 06:32:15 AM	1	120.00	Edit
<input type="checkbox"/>	New Year	2016/12/01 06:33:17 AM	2017/01/20 06:33:17 AM	1	130.00	Edit

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New Special Date Rule

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Reset

Save and Continue Edit

Save Rule

SPECIAL DATE PRICE RULE CONFIGURATION

Special Date Rule

Special Date Price Rule

Rule Name *

Custom Special Date

Special Date From *

Jan 31, 2016

Special Date To *

Feb 4, 2016

To *

Add a fixed amount

Amount *

200

Another price rules - **Recurring Price Rules** allows you to create recurring price rules for Time Activity such as every day, every week, every month, every year.

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Recurring Price Rules

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2 records found

20 per page

1 of 1

	Option	Rule Name	From Time	To Time	Function	Priority	Amount	Action
<input type="checkbox"/>	1	Every day	08:15:00	17:00:00	1		120.00	Edit
<input type="checkbox"/>	2	Every week	Mon,08:00:	Wed,17:00:	1		130.00	Edit

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New Recurring Price Rule

RECURRING PRICE RULE CONFIGURATION

Recurring Rule

Recurring Price Rule

Rule Name *

Rule Name

Recurring Option

Every day

Every day

Every week

Every month

Every year

Recurring Time From

:

00

Recurring Time To

00

:

00

:

00

Recurring Function *

Add a fixed amount

Amount *

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Admin can set time for Recurring Price Rule

Main Features

Product Schedule

The extension added a new product type called **Appointment Booking** into the system, so you can add a new product of type Appointment Booking from scratch.

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magenest

Add Product

Simple Product

Configurable Product

Grouped Product

Virtual Product

Bundle Product

Downloadable Product

Appointment Booking

Filters

Default

Actions

6 records found

20 per page

	ID	Thumbnail	Name	Type	Attribute Set	SKU	Price	Quantity	Visibility	Status	Website	Edit
<input type="checkbox"/>	1		Napa Vineyard Massage	Appointment Booking	Default	Full Day Service	\$250.00	1000.0000	Catalog, Search	Enabled	Main Website	Edit
<input type="checkbox"/>	2		Naviland Golf Course	Appointment Booking	Default	Naviland Golf Course	\$200.00	99998.0000	Catalog, Search	Enabled	Main Website	Edit
<input type="checkbox"/>	3		Conference Room	Appointment Booking	Default	Conference Room	\$300.00	998.0000	Catalog, Search	Enabled	Main Website	Edit

Tutorial Menu

In the product detail page, Appointment Booking products display as follows.



Store View: All Store Views



Back

Add Attribute

Save



Enable Product ☒ Yes

[website]

Attribute Set

Default



Product Name *

[store view]

Simple Therapy

SKU *

[global]

Simple Therapy

Price *

[website]

\$ 10.00

[Advanced Pricing](#)

Quantity

[global]

50

[Advanced Inventory](#)

Stock Status

[global]

In Stock



Categories

[global]

Appointment Booking



[New Category](#)

Visibility

[store view]

Catalog, Search



Set Product as New From

[website]



To



Content



Product Reviews



Images And Videos

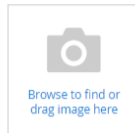


[Add Video](#)



650x435 px, 48 KB

Base Small Thumbnail



Search Engine Optimization



Related Products, Up-Sells, and Cross-Sells



Customizable Options



Product in Websites



Design



Schedule Design Update



Gift Options

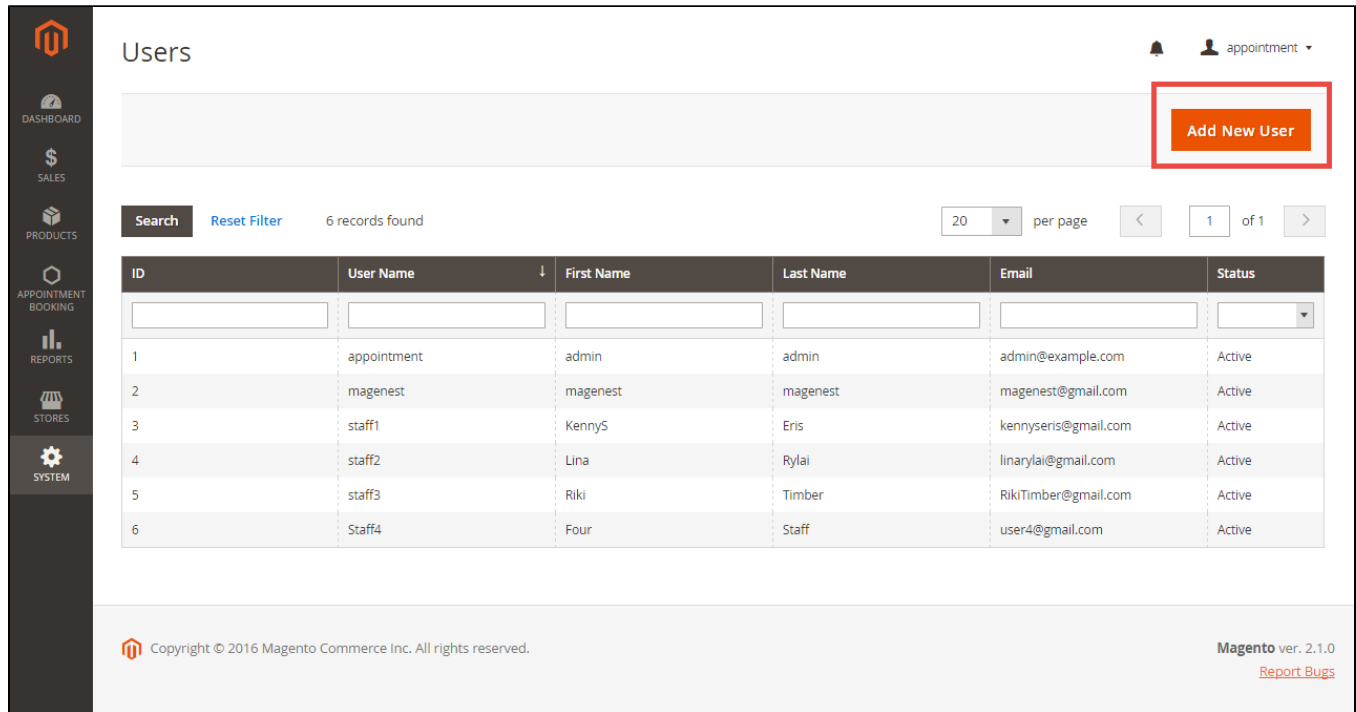


Attributes



Staff Information

In the backend, go to **System > All Users > Add New User** button to add new staffs into store.



Users

[Add New User](#)

Search [Reset Filter](#) 6 records found

20 per page 1 of 1

ID	User Name	First Name	Last Name	Email	Status
1	appointment	admin	admin	admin@example.com	Active
2	magenest	magenest	magenest	magenest@gmail.com	Active
3	staff1	KennyS	Eris	kennyseris@gmail.com	Active
4	staff2	Lina	Rylai	linarylai@gmail.com	Active
5	staff3	Riki	Timber	RikiTimber@gmail.com	Active
6	Staff4	Four	Staff	user4@gmail.com	Active

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At **Staff Management** tab, you will be taken to the users list.

In each user info, you are able to make an admin user a staff, and vice versa in the **User Role** tab.

In addition, you can add some information of the staff in the **Staff Information**

- **Self-description:** Self introduction of the staff
- **Staff type:** the expertise level of the staff
- **User image upload:** Upload profile image to let customers know who serves them.

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Scarlett Honor

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Delete User

Reset

Force Sign-In

Save User

USER INFORMATION

Work Schedule

Staff Information

Staff Orders

User Info

User Role

Staff Information

Self-Description

Staff Type

User Image Upload

Friendly, Hard-working

+2 years experience

Browse...

No file selected.

Remove

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Magento ver. 2.1.5

[Account Activity](#) | [Report Bugs](#)

In **Work Schedule**, you can set the working time schedule that is available for the staff with the reservation options, days, product ID, and time.

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User Roles

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Reset

Force Sign-In

Save User

USER INFORMATION

Work Schedule

Staff Information

Staff Orders

User Info

User Role

User Schedule manager

Add Schedule

Reservation Option	Weekday	Product ID	Start time	End time	
Some hours in 1 day	Monday	11	12:00 AM	01:00 AM	Delete
Some hours in 1 day	Monday	11	01:00 AM	02:00 AM	Delete

Remember that, you must go to **User info** tab to reconfirm password when you make any changes.

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admin admin

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Delete User

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Save User

USER INFORMATION

Work Schedule

Staff Information

Booking Information

User Info

User Role

Account Information

User Name *

First Name *

Last Name *

Email *

New Password

Password Confirmation

Interface Locale

Current User Identity Verification

Your Password *

This is a required field.

You can add working schedule for the staff by clicking on **Save User** button and your newly filled schedules will be saved.

You can also delete an existing schedule by clicking on the **Delete User** button. Note that the schedule will not be saved if one input is not properly filled.

Moreover, you can also track the appointments of the staff in the **Staff Orders** section.

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Delete User

Reset

Force Sign-In

Save User

USER INFORMATION

Work Schedule

Staff Information

Staff Orders

User Info

User Role

Search by keyword

Filters

Default View

Columns

Export

6 records found

20

per page

<

1

of 1

>

Order Id	Product Name	Customer Name	Booking Status	Order Status	Booking Date	Event	From Time	To Time	Staff Name	Action
1	Full day Service	Thomas Stevens	canceled	canceled	2017/03/29	Gold Week, Rush hour,	00:00	23:59	Scarlett Honor	View
2	Full day Service	John Richar	confirmed	pending	2017/03/29	Gold Week, Rush hour,	00:00	23:59	Scarlett Honor	View

Usage Procedure

In a frontend detail page of a product of type Appointment Booking, customers are able to select a date with a calendar view as shown.

CONFERENCE ROOM



May 2017

WK	SUN	MON	TUE	WED	THU	FRI	SAT
17		1	2	3	4	5	6
18	7	8	9	10	11	12	13
19	14	15	16	17	18	19	20
20	21	22	23	24	25	26	27
21	28	29	30	31			

Go Today Close

Select a date ...



REVIEWS

You're reviewing: **Conference Room**

NICKNAME *

SUMMARY *

REVIEW *

SUBMIT REVIEW

NEWSLETTER

Sign Up for Our Newsletter:

Enter your email address

SUBSCRIBE

ABOUT

Privacy Policy
Terms and Conditions
Magento Marketplace


HELP

FAQ
ORDER TRACKING
SHIPPING AND HANDLING

INFORMATION

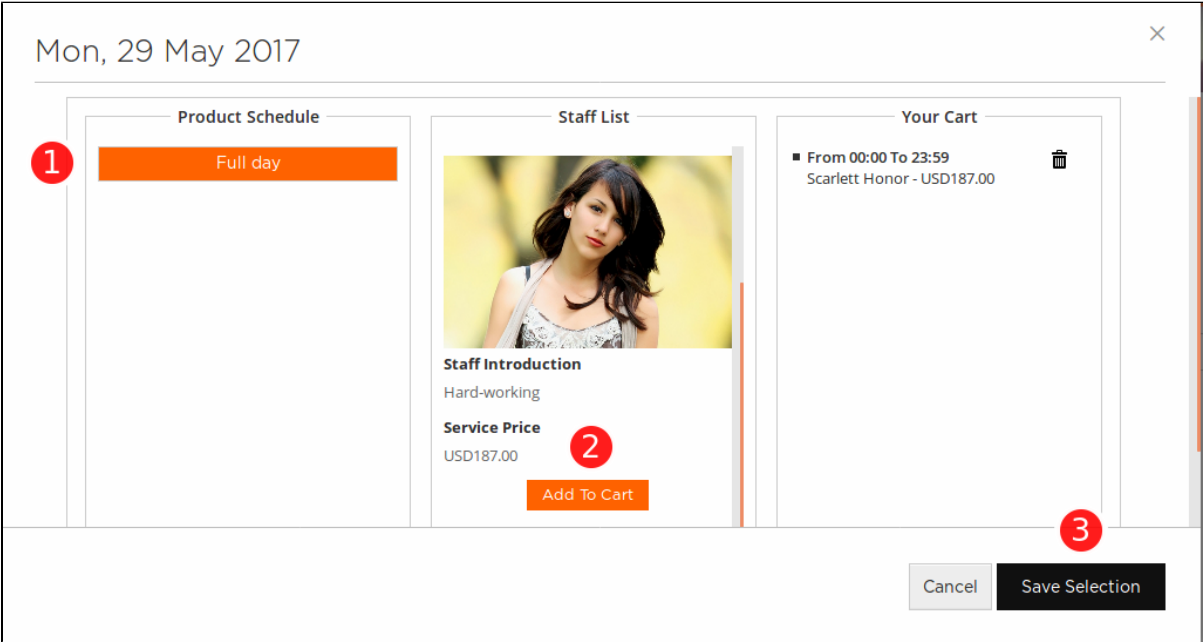
ABOUT US
DELIVERY INFORMATION
PRIVACY POLICY

CONTACT US

 support@magenest.com

When a day is selected, the system will check if there is any product schedules available that day and display them. It will also check if the selected day is within a special date range as formerly specified.

Then if a schedule is selected, the system will now check the staff with the corresponding schedule. Some information about the staff will also be displayed.



Then when the customer add the product to cart, he will be able to view the product options which are also booking options.

CONFERENCE ROOM

Home → Conference Room



CONFERENCE ROOM

Qty: 1

\$294.00



SUBTOTAL : \$294.00

VIEW CART

CHECKOUT

✓ You added Conference Room to your shopping cart.



CONFERENCE ROOM

Be the first to review this product

\$300.00

SKU#: Conference Room

Tue, 6 Jun 2017



REVIEWS

You're reviewing:Conference Room

NICKNAME *

SUMMARY *

REVIEW *

SUBMIT REVIEW

NEWSLETTER

Sign Up for Our Newsletter:

Enter your email address

SUBSCRIBE

ABOUT

Privacy Policy

Terms and Conditions

HELP

FAQ

ORDER TRACKING

INFORMATION

ABOUT US

DELIVERY INFORMATION

CONTACT US



support@magenest.com

When the order is successfully placed, customers can check their orders in **My Orders** page in customer's **My Account**.

This is demo store. No orders will be fulfilled.
 [GET STARTED FOR FREE](#)

ORDER # 000000006

COMPLETE

May 31, 2017
 Reorder

Print

My Account
 My Booked Appointments
 Account Dashboard
 Account Information
 Address Book
 My Downloadable Products
My Orders
 Newsletter Subscriptions
 Stored Payment Methods
 My Product Reviews
 Billing Agreements
 My Wish List

Items Ordered
 Invoices

Product Name	SKU	Price	Qty	Subtotal
CONFERENCE ROOM	Conference Room	\$297.00	Ordered: 1	\$297.00
Booking Date Thu, 1 Jun 2017				
From 00:00 To 23:59 No Special Event, Rush hour, [4 Scarlett Honor] USD297.00				
				Subtotal \$297.00
				Estimated Total \$297.00

Tutorial Menu

For easier management over booked appointments, the customer can also check the **My Booked Appointments** tab.

This is demo store. No orders will be fulfilled.
 [GET STARTED FOR FREE](#)

APPOINTMENT BOOKING

 DEFAULT STORE VIEW

MY BOOKED APPOINTMENTS

My Account
My Booked Appointments
 Account Dashboard
 Account Information
 Address Book
 My Downloadable Products
 My Orders
 Newsletter Subscriptions
 Stored Payment Methods
 My Product Reviews
 Billing Agreements
 My Wish List

Order #	Product Name	Booked Date	Start Time	End Time	Staff Name	Booking Status	
6	Conference Room	2017/06/01	00:00	23:59	Scarlett Honor	confirmed	View Reorder Request Cancel
7	Conference Room	2017/06/05	15:00	21:00	Scarlett Honor	confirmed	View Reorder Request Cancel

Tutorial Menu

From admin's perspective, you can view all booked appointments in **Booking Orders** tab in **Appointment Booking** menu.

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- SALES
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- APPOINTMENT BOOKING**
- CUSTOMERS
- MARKETING
- CONTENT

Appointment Booking Orders

Search by keyword

Filters

Default View

Columns

Export

7 records found

20 per page

1 of 1

Actions

Delete

Confirmed

Unconfirmed

Canceled

Product Name	Customer Name	Order Status	Booking Date	Event	From Time	To Time	Staff Name	Action
Conference Room	Thomas Stevens	confirmed	2017/06/01	No Special Event, Rush hour,	00:00	23:59	Scarlett Honor	View
Full day Service	John Richar	canceled	2017/03/29	Gold Week, Rush hour,	00:00	23:59	Andy	View
Full day Service	Guest	confirmed	2017/03/29	Gold Week, Rush hour,	00:00	23:59	Scarlett Honor	View
Naviland Golt Course	Guest	confirmed	2017/05/24	No Special Event, Rush hour,	00:00	23:59	Andy	View

You can view all booked appointments in Full Calendar mode, just by pressing the **View in Full Calendar** button.

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- CUSTOMERS
- MARKETING
- CONTENT
- REPORTS
- STORES
- SYSTEM
- FIND

Full Calendar View

<

>

today

March 2016

month

week

day

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	1	2	3	4	5
6	7	8	9	10	11	12
	<div>8a Veronica Costello, X</div> <div>8a Veronica Costello, X</div> <div>8a Veronica Costello, X</div>					
13	14	15	16	17	18	19
	<div>8a Veronica Costello, X</div>					
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

You can also sync and view booked appointments on your Google Calendar account by clicking **Sync and View in Google Calendar** button. One small reminder here, if your browser is already logged in with your Google account, you will probably encounter a cookie error. You can avoid this error by erasing cookie and cache in the browser, re-login and the extension will function as normal.

Sign in with your account and authorize connection to your created project on Google Developer Console, then your appointments will appear on your calendar as shown.

Calendar

Today

< >

March 2016

Day

Week

Month

4 Days

Agenda

CREATE

▼ March 2016

S M T W T F S

28 29 1 2 3 4 5

6 7 8 9 10 11 12

13 14 15 16 17 18 19

20 21 22 23 24 25 26

27 28 29 30 31 1 2

3 4 5 6 7 8 9

▼ My calendars

Hậu Phạm

Appointment Booking

Birthdays

Tasks

▼ Other calendars

Add a friend's calendar

Holidays in Vietnam

Terms - Privacy

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	Mar 1	2	3	4	5
6	7 3p Appointment: Spa 3p Appointment: Spa 3p Appointment: Spa	8	9	10	11	12
13	14 3p Appointment: Spa	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	Apr 1	2

If you take a closer look into an event's details in Google Calendar, some necessary information will be displayed in the event's description.

Appointment: Spa Therapy Massage

2/1/2016

8:00am

to

9:00am

2/1/2016

(GMT+00:00) GMT (no daylight saving)

Time zone

☐ All day

☐ Repeat...

Event details

Find a time

Where

Enter a location

Video call

Add video call

Calendar

Appointment Booking

Created by

qhauict13@gmail.com

Description

Customer name: Veronica Costello

Customer email: roni_cost@example.com

Booked date: Mon, 1 Feb 2016

Booking status: unconfirmed

Staff name: John Miller, ID: 3

Date created: 2016-02-28 16:18:36

Attachment

Add attachment

Event color

☒
☐
☐
☐
☐
☐
☐
☐
☐
☐
☐

Notifications

No notifications set

Add a notification

Show me as

☐ Available
☒ Busy

Visibility

☒ Calendar default
☐ Public
☐ Private

Add guests

Enter guest email address

Add

Guests can

☐ modify event
☒ invite others
☒ see guest list

Cancel Requests

Once the appointment has been booked but the customer changed his mind, he can send a cancel request to the admin. He need to go to **My Booked Appointments** tab in **My Account**. Besides View and Reorder button, there will be **Request Cancel** buttons that once clicked, a request will be sent to the admin.

This is demo store. No orders will be fulfilled.
GET STARTED FOR FREE

Magenest
APPOINTMENT BOOKING
DEFAULT STORE VIEW

CANCEL REQUEST SENT

My Account
My Booked Appointments
Account Dashboard
Account Information
Address Book
My Downloadable Products
My Orders
Newsletter Subscriptions
Stored Payment Methods
My Product Reviews
Billing Agreements
My Wish List

Your cancel request has been sent!
We will contact you as soon as possible to confirm the request.
Request information:
- Order Id: **6**
- Booked Date: **2017**
- Start time: **00:00**
- End time: **23:59**
- Product name: **Conference Room**
- Staff name: **Scarlett Honor**

Tutorial Menu

On backend side, go to **Cancel Requests** tab, you can see the cancel requests.

DASHBOARD
SALES
PRODUCTS
APPOINTMENT BOOKING
CUSTOMERS
MARKETING
CONTENT

Cancel Requests

Search by keyword
Filters
Default View
Columns
Export

1 records found
20 per page
1 of 1

	Product Name	Customer Name	Cancel Status	Booking Date	From Time	To Time	Staff Name	Action
<input type="checkbox"/> 6 Delete Cancel Schedule	Conference Room	Thomas Stevens	pending	2017/06/01	00:00	23:59	Scarlett Honor	View

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Magento ver. 2.1.5
[Account Activity](#) | [Report Bugs](#)

Tutorial Menu

Update

- When a bug fix or new feature is released, we will provide you with the extension's new package.
- All you need to do is repeating the above installing steps and uploading the package onto your store. The code will automatically override.
- Flush the config cache. Your store and newly installed extension should be working as expected.

Support

- We will reply to support requests within **2 business days**.
 - We will offer **lifetime free update and 6 months free support for all of our paid products**. Support includes answering questions related to our products, bug/error fixing to make sure our products fit well in your site exactly like our demo.
 - Support **DOES NOT** include other series such as customizing our products, installation and uninstallation service.
-

Once again, thank you for purchasing our extension. If you have any questions relating to this extension, please do not hesitate to contact us for support.