

# 4.6 Book me - Make an appointment

Version 21.01 onward includes the new Book me function to make appointments based on the calendar slots made available by crm users. Let's take a look at how it works and how to configure this new feature properly.

A new block entitled **Book me configuration** has been added to user preferences.

**Book me Configuration** □

Enable Book me	Event selection mode
yes	Semiautomatic
Event duration	Minimum time between events
30 minutes	1 hour
Default in email composing	
no	

## *View of Book me configuration*

<b>Enable Book me</b>	enable/disable the calendar booking function when compiling a new email. This function enables a flag in the email composer and makes it possible to use / not use this function with the recipients of the email in question
<b>Events selection mode</b>	defines event selection mode: semiautomatic, automatic, or manual (as illustrated below)
<b>Event duration</b>	allows you to set the duration of the event
<b>Minimum time between events</b>	defines the minimum time that must exist between one event and another (only in automatic mode)
<b>Email compilation default</b>	determines if the Book me flag in the email compose popup is enabled by default. This involves the automatic insertion of the Book me link in the signature

## **Semiautomatic mode**

Semiautomatic mode selects **"Free for appointment"** type events and subdivides them into booking slots that will have the duration set in the **"Event duration"** field in user settings. The time slots available are: 15 minutes, 30 minutes, 1 hour, and 2 hours.

**Add Event**

Activity Type: Free for appointment (highlighted with a red box and arrow) | Visibility: Standard

Subject: Free for appointment

Description: [Empty text area]

Location: [Empty text area]

Status: Planned

Assigned To: User | Search...

Priority: High

Event starts at: [Empty] | Event ends on: [Empty]

Related To: Accoi | Search... | [List icon] [Close icon]

Contacts: Search... | [List icon] [Close icon]

Save | Cancel

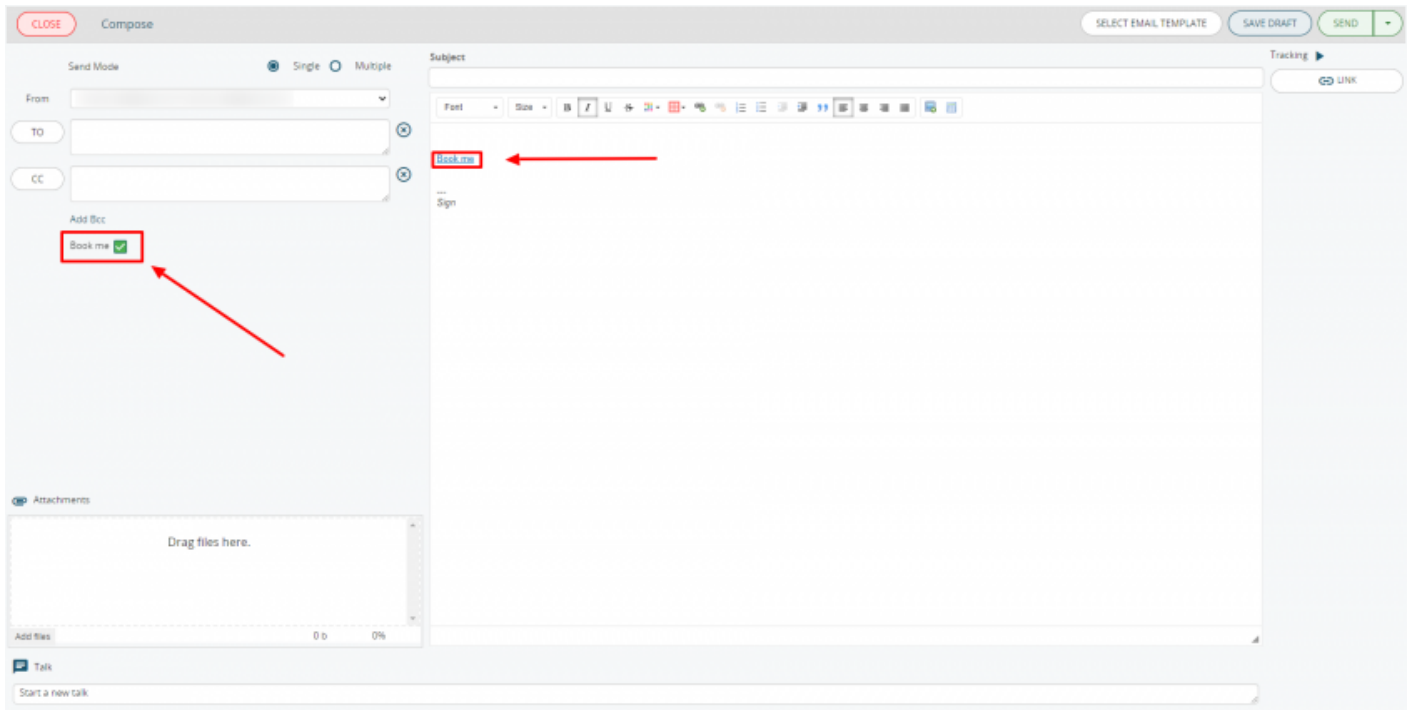
### Automatic mode

Automatic mode finds spaces between events having the duration set in the **"Minimum time between events"** field and subdivides them into booking slots with the time set in the **"Event duration"** field in user settings. The time slots available are: 15 minutes, 30 minutes, 1 hour, and 2 hours.

### Manual mode

Manual mode selects **"Free for appointment"** type events and uses the entire event duration for the booking space.

By default, the Book me function is disabled for all users. Once the specific flag is checked in user preferences, a booking link can be sent by compiling an email from the Messages module.



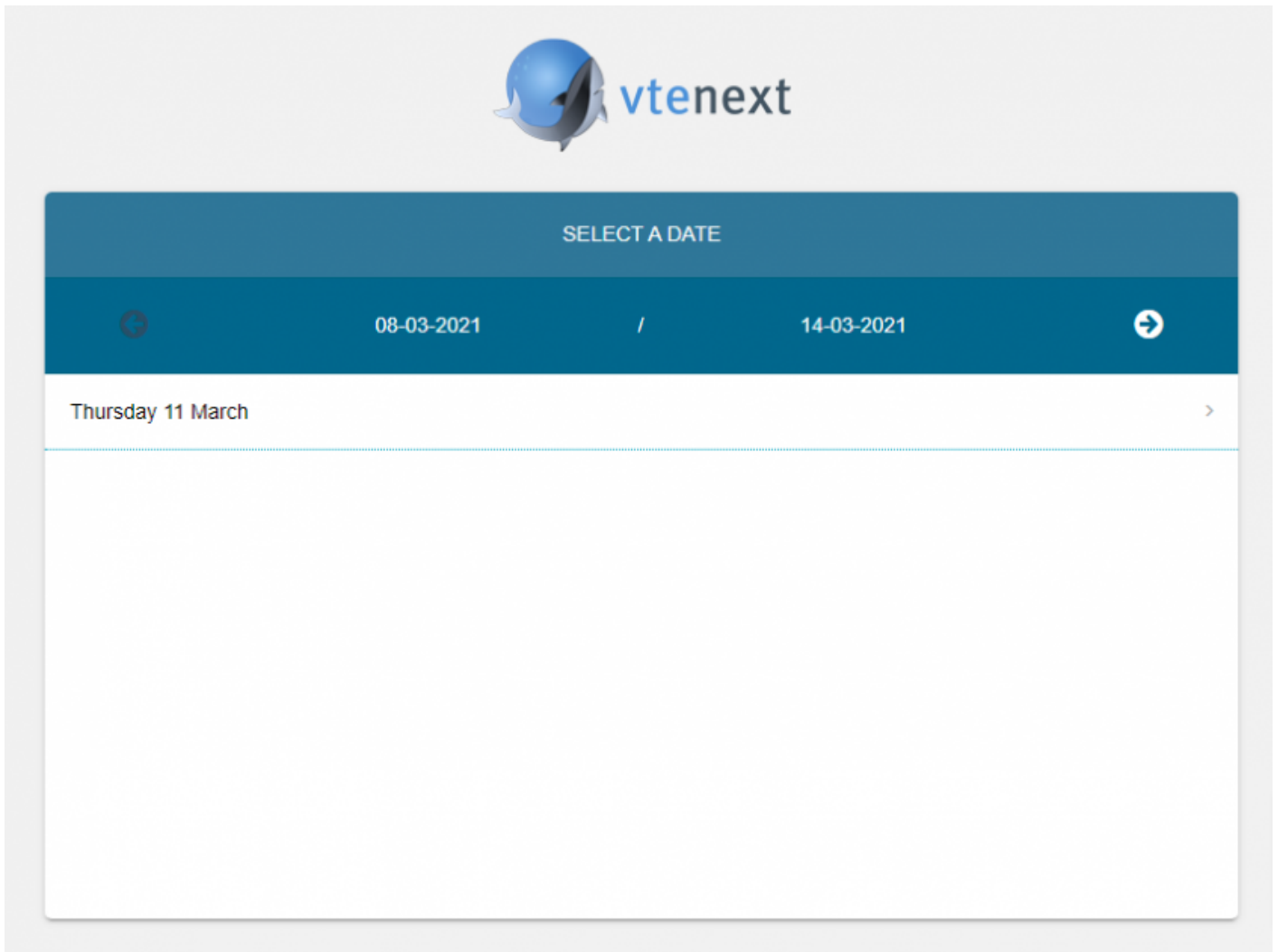
*View of the Book me function from the email compilation window*

### Operating cycle

When a user sets semiautomatic mode, he/she creates a "Free for booking" type event, and an event will appear in the calendar as shown in the next image:

Wed 3/10	Thu 3/11	Fri 3/12
	<div data-bbox="571 1361 1034 1653" style="background-color: #00a68a; color: white; padding: 5px;"> <p><b>09:00 - 13:00</b> Free for appointment</p> </div>	

The user will then send an email with a "Book me" link as shown previously. When the recipient clicks on the link, he/she will access a dialog box in which to first select the date (if there is more than one date available) and then the preferred time slot as determined by the preferences set by the user in the **Event duration field**.



*View of date selection window*

Back SELECT AN HOUR

11-03-2021

09:00 - 09:30	>
09:30 - 10:00	>
10:00 - 10:30	>
10:30 - 11:00	>
11:00 - 11:30	>
11:30 - 12:00	>
12:00 - 12:30	>

*View of time slot selection window*



CONFIRM YOUR APPOINTMENT

CONFIRM YOUR APPOINTMENT:  
11-03-2021 09:00-09:30

vtenext

Francesco

Villani

test@myemail.com

123456789

CANCEL

CONFIRM

*View of customer data input and booking confirmation*

Your appointment was successfully booked!

OK



### CONFIRM YOUR APPOINTMENT

CONFIRM YOUR APPOINTMENT:

11-03-2021 09:30-10:00

vtenext

Francesco

Villani



test@myemail.com

123456789

CANCEL

CONFIRM

Once you click on CONFIRM, the page will produce an alert that shows whether or not the operation was successful.

In this page note that **it was not possible to send the confirmation**. It is therefore essential for the mail server to be correctly configured in the crm, in SETTINGS > MAIL SERVER.

**N.B.:** to check the mail server configuration, refer to chapter [5.1 Outgoing mail configuration \(SMTP\)](#).

**Caution:** bookings are accepted for days after the current day. The calendar also sets the basic language to the language selected in user preferences!

On the crm user side, when a customer makes a booking, he/she receives a notification from the system with details of the event (which will be clickable and visible on the system).



**Francesco Villani**

**New Book me appointment:** Appointment with Villani Francesco for the day 11-03-2021 from 09:30 to 10:00

Appointment with test@myemail.com (Event)

9 minutes ago

*View of crm notification with booking configuration*

Conversely, the customer will receive an email with details of the booking made and a link to cancel the booking.

## Confirmation of the appointment

Wednesday 10-03-2021 11:55:40



**Johnson**

To: esami.vte

Hi Williams Linda,

I confirm the appointment for the day 11-03-2021 from 11:00 to 11:30.

If you need further information please contact me via email.

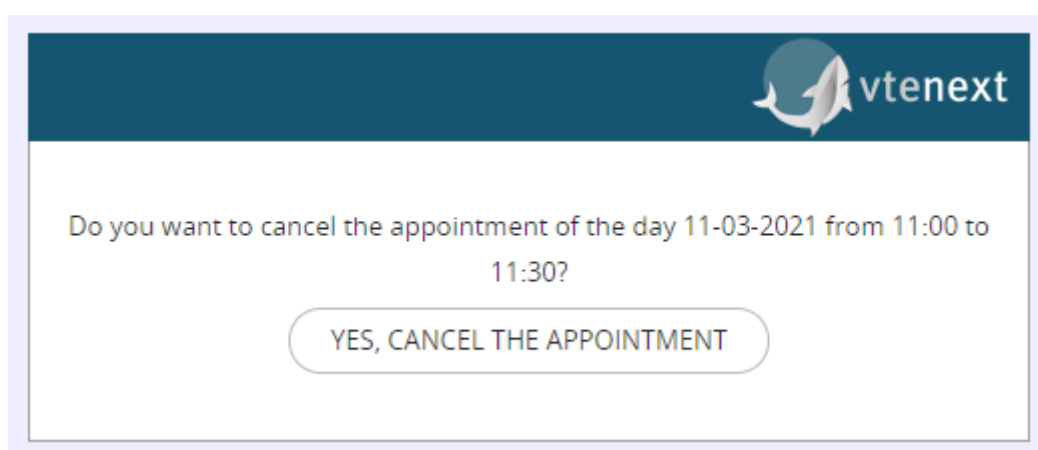
If you want to cancel the appointment, click the link below.

Cancel your appointment.

See you soon.

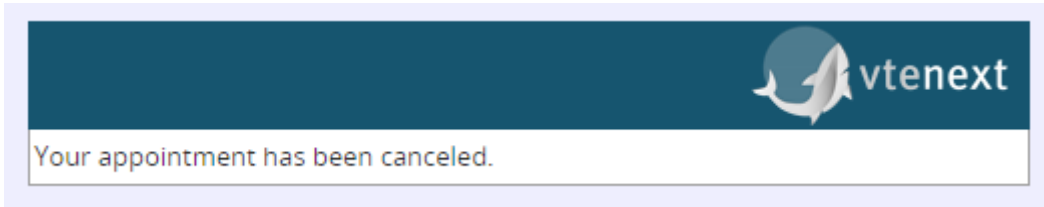
*View of the email received by the customers with booking confirmation, and option to cancel it*

If the customer decides to click on Cancel your booking, a window will open in their browser with the following page to confirm booking cancellation:



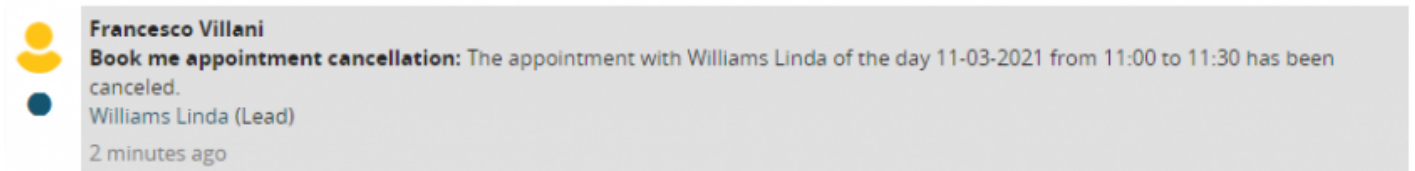
*View of cancellation page (customer browser)*

Once the customer user has clicked on the YES, CANCEL BOOKING button, a confirmation page will be displayed, as shown below:



*View of cancellation confirmation (customer browser)*

Simultaneously a notification is sent also to the crm user, informing him/her of the cancelled booking. Automatically, also the calendar slot will revert to free!



*View of booking cancellation notification*

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Revision #2

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