

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

yes

Event duration

30 minutes

Default in email composing

no

Event selection mode

Semiautomatic

Minimum time between events

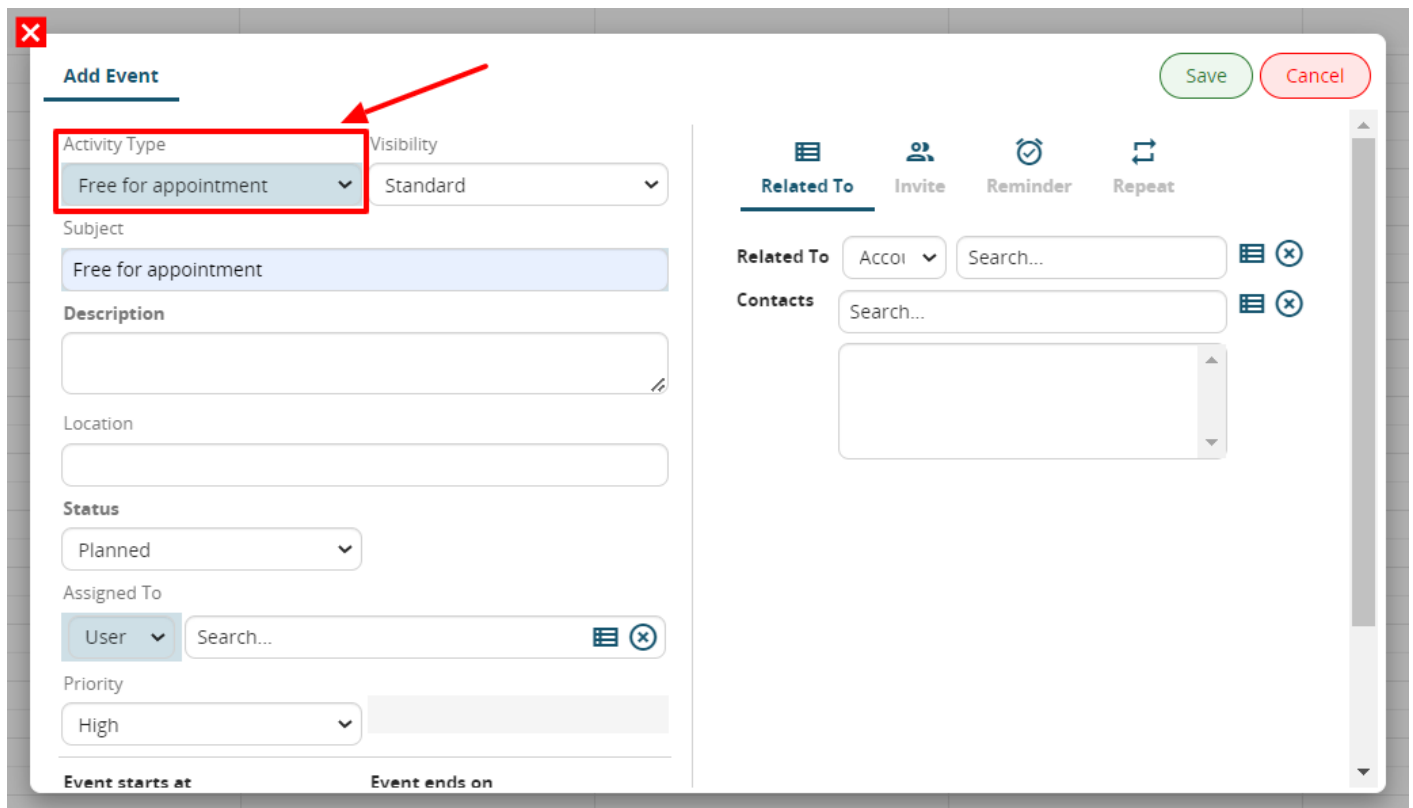
1 hour

View of Book me configuration

| | |
|-----------------------------|---|
| Enable Book me | 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 |
| Events selection mode | defines event selection mode: semiautomatic, automatic, or manual (as illustrated below) |
| Event duration | allows you to set the duration of the event |
| Minimum time between events | defines the minimum time that must exist between one event and another (only in automatic mode) |
| Email compilation default | 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.



The screenshot shows a web application window titled "Add Event" with a red 'X' icon in the top-left corner. The form is divided into two main sections. The left section contains fields for "Activity Type" (a dropdown menu with "Free for appointment" selected and highlighted by a red box and a red arrow), "Visibility" (a dropdown menu with "Standard" selected), "Subject" (a text input field with "Free for appointment" entered), "Description" (a text input field), "Location" (a text input field), "Status" (a dropdown menu with "Planned" selected), "Assigned To" (a dropdown menu with "User" selected and a search input field), and "Priority" (a dropdown menu with "High" selected). The right section contains tabs for "Related To", "Invite", "Reminder", and "Repeat". Below the "Related To" tab, there is a search input field with "Accoi" entered and a search button. Below the "Contacts" tab, there is a search input field. At the bottom of the form, there are two fields: "Event starts at" and "Event ends on". In the top-right corner, there are "Save" and "Cancel" buttons.

Automatic mode

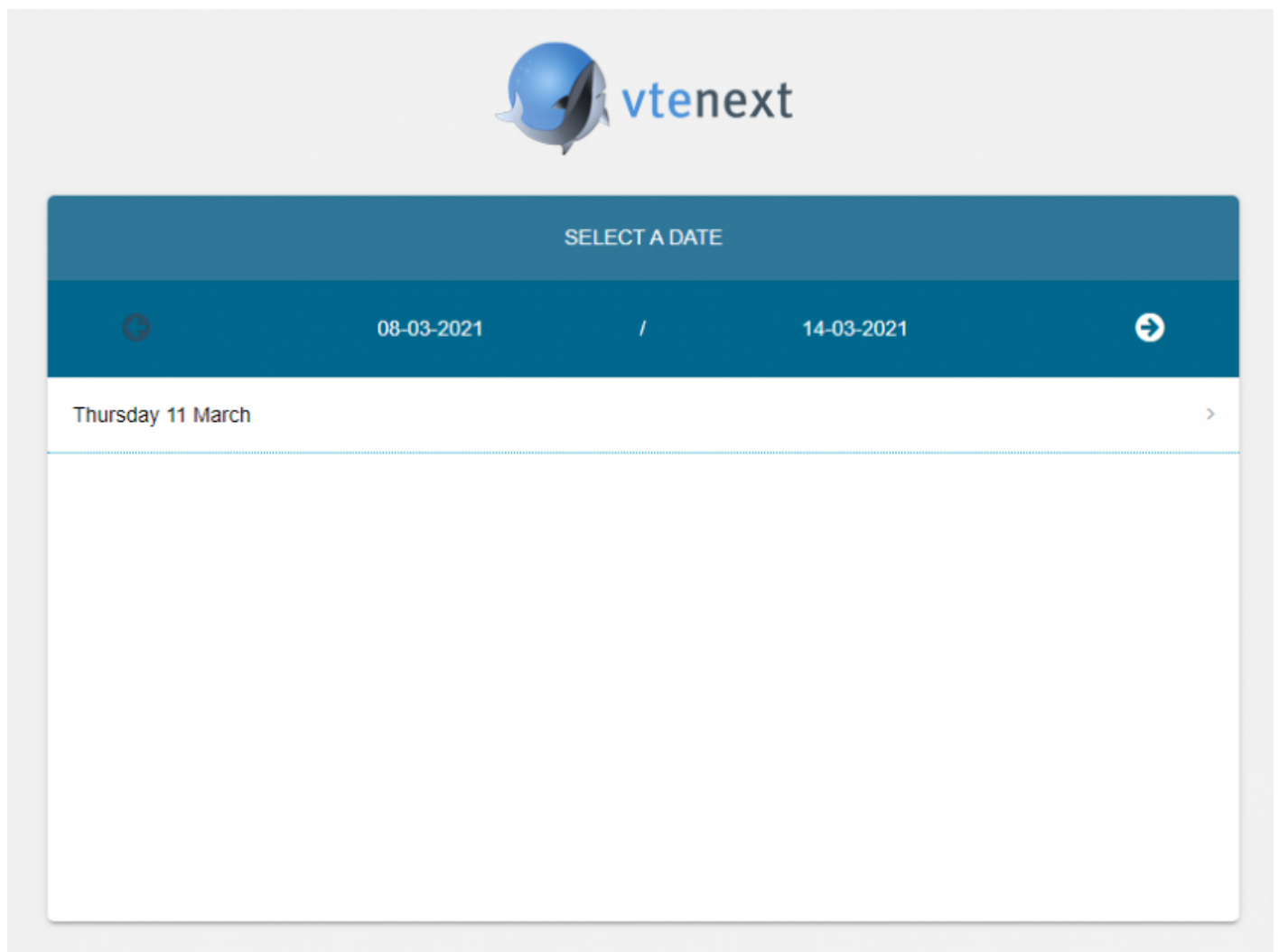
Automatic mode finds spaces between events having the duration set in the **"Minimum time between events"** field and subdivides them into booking slots with the time set in the **"Event duration"** field in user settings. The time slots available are: 15 minutes, 30 minutes, 1 hour, and 2 hours.

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.

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

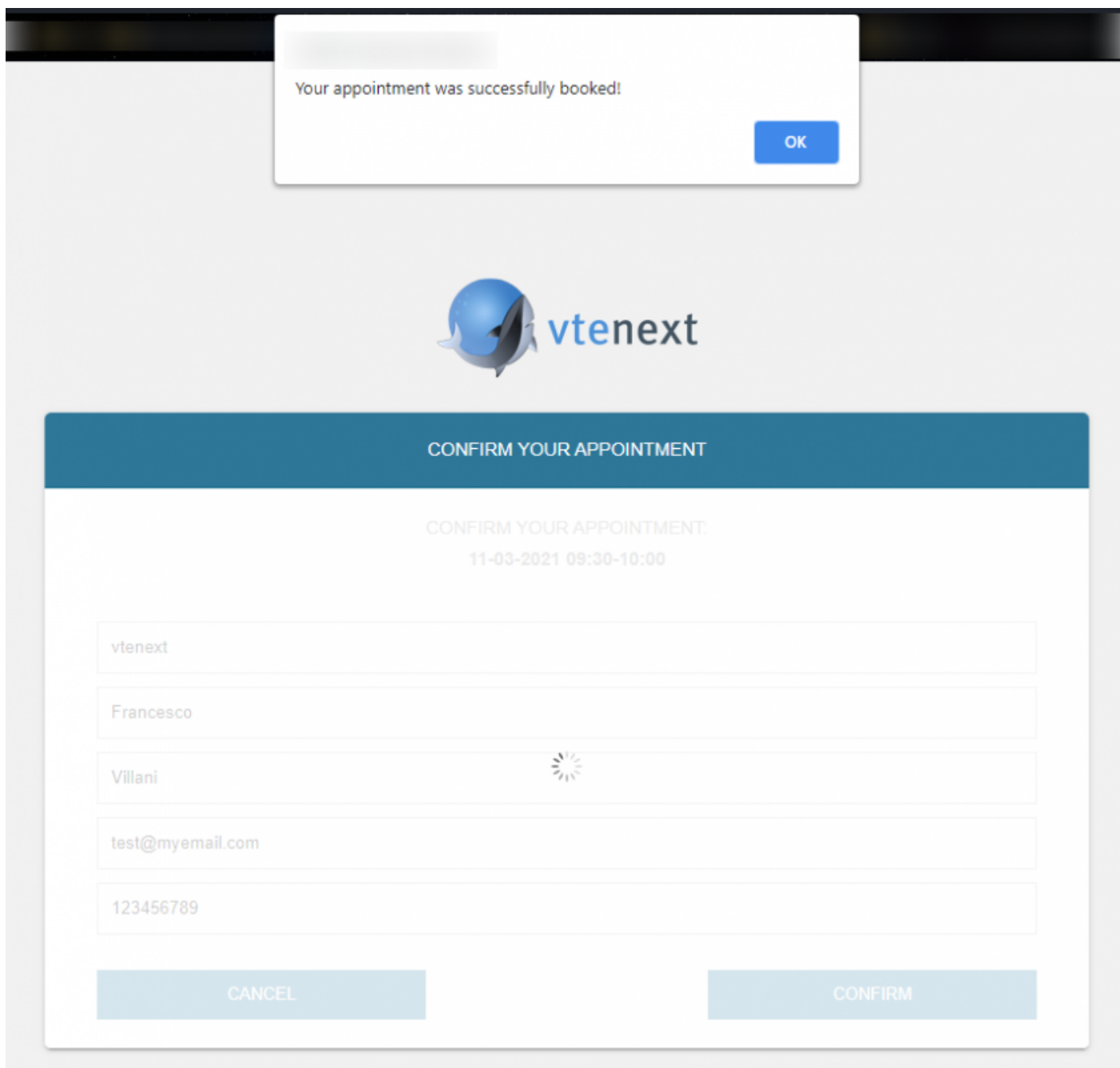
test@myemail.com

123456789

CANCEL


CONFIRM

View of customer data input and booking confirmation



Your appointment was successfully booked!

OK

 vtenext

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.

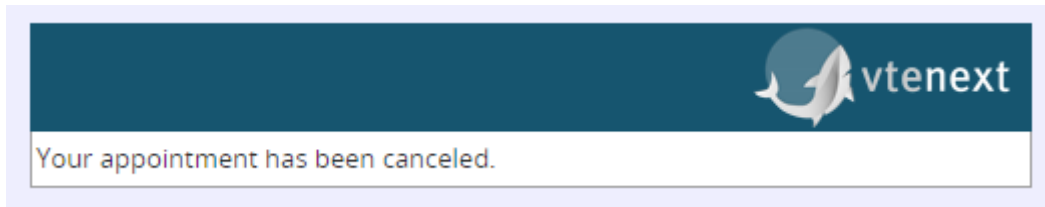
View of the email received by the customers with booking confirmation, and option to cancel it

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:

The screenshot shows a web browser window with a dark blue header containing the 'vtenext' logo. The main content area is white and contains the text: 'Do you want to cancel the appointment of the day 11-03-2021 from 11:00 to 11:30?'. Below this text is a single button with the text 'YES, CANCEL THE APPOINTMENT'.

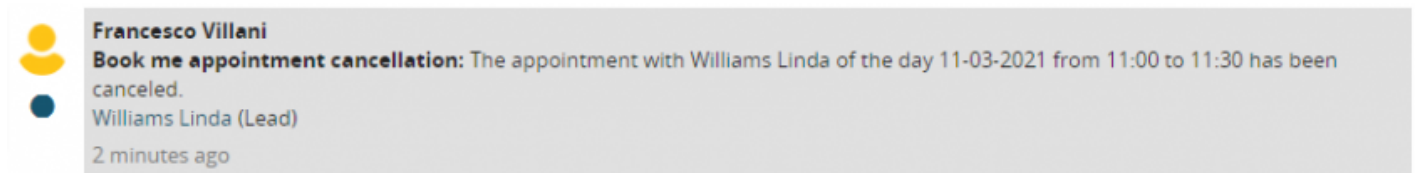
View of cancellation page (customer browser)

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

Revision #2

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