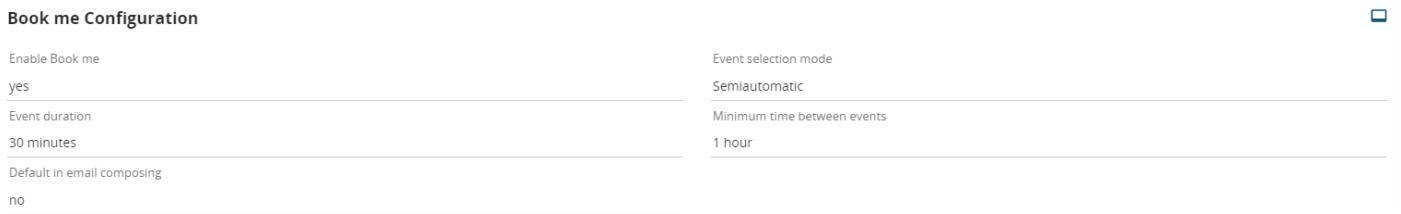
4.6 Book me - Make an appointment

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.

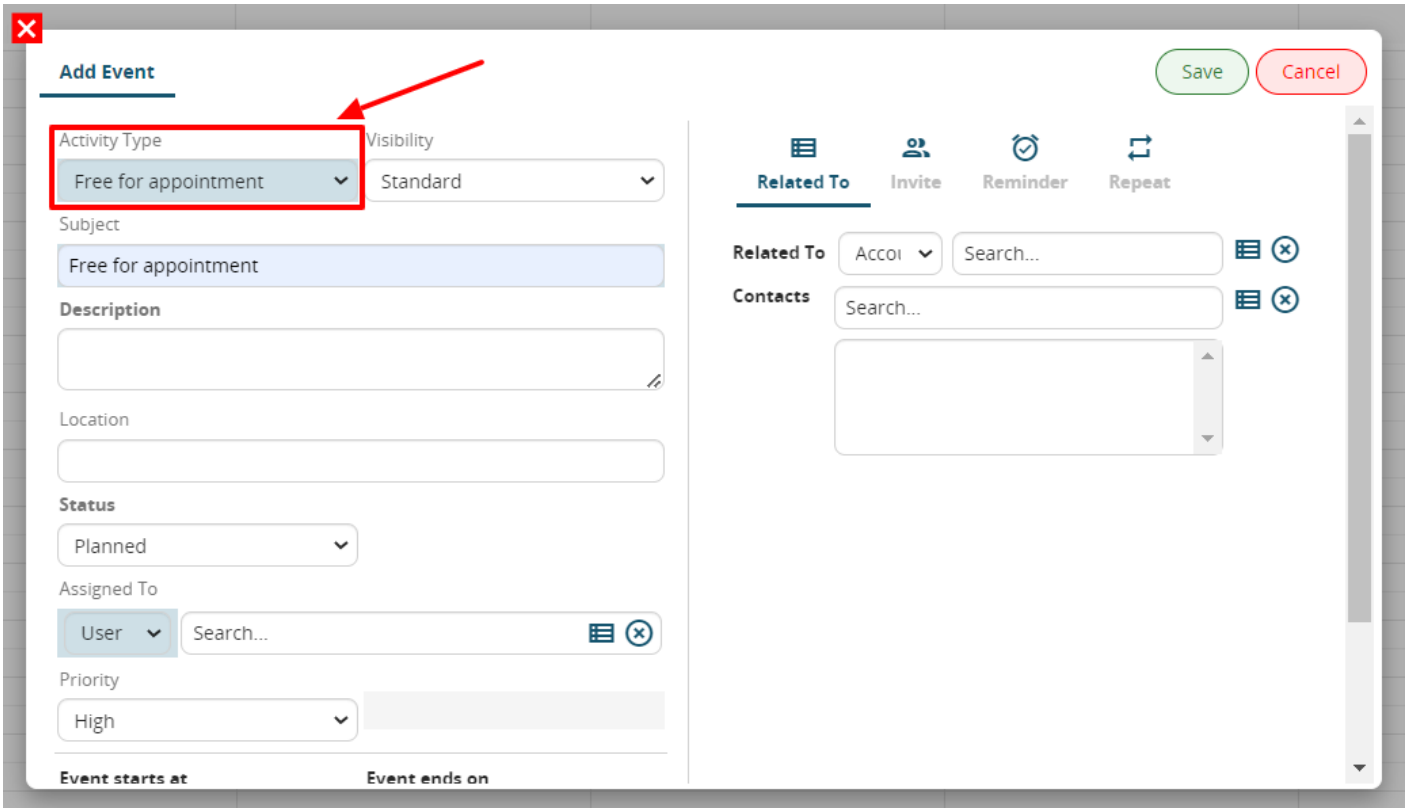


View of Book me configuration

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.



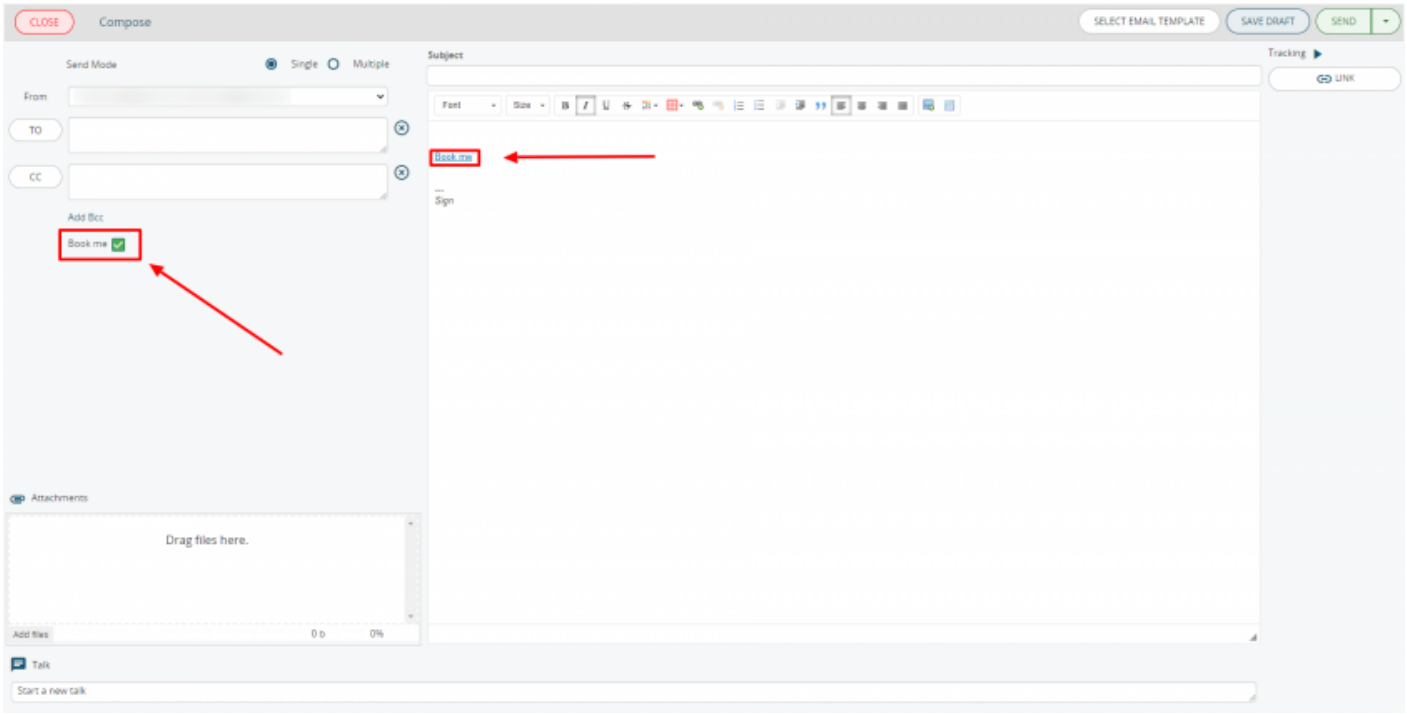
Automatic mode

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.

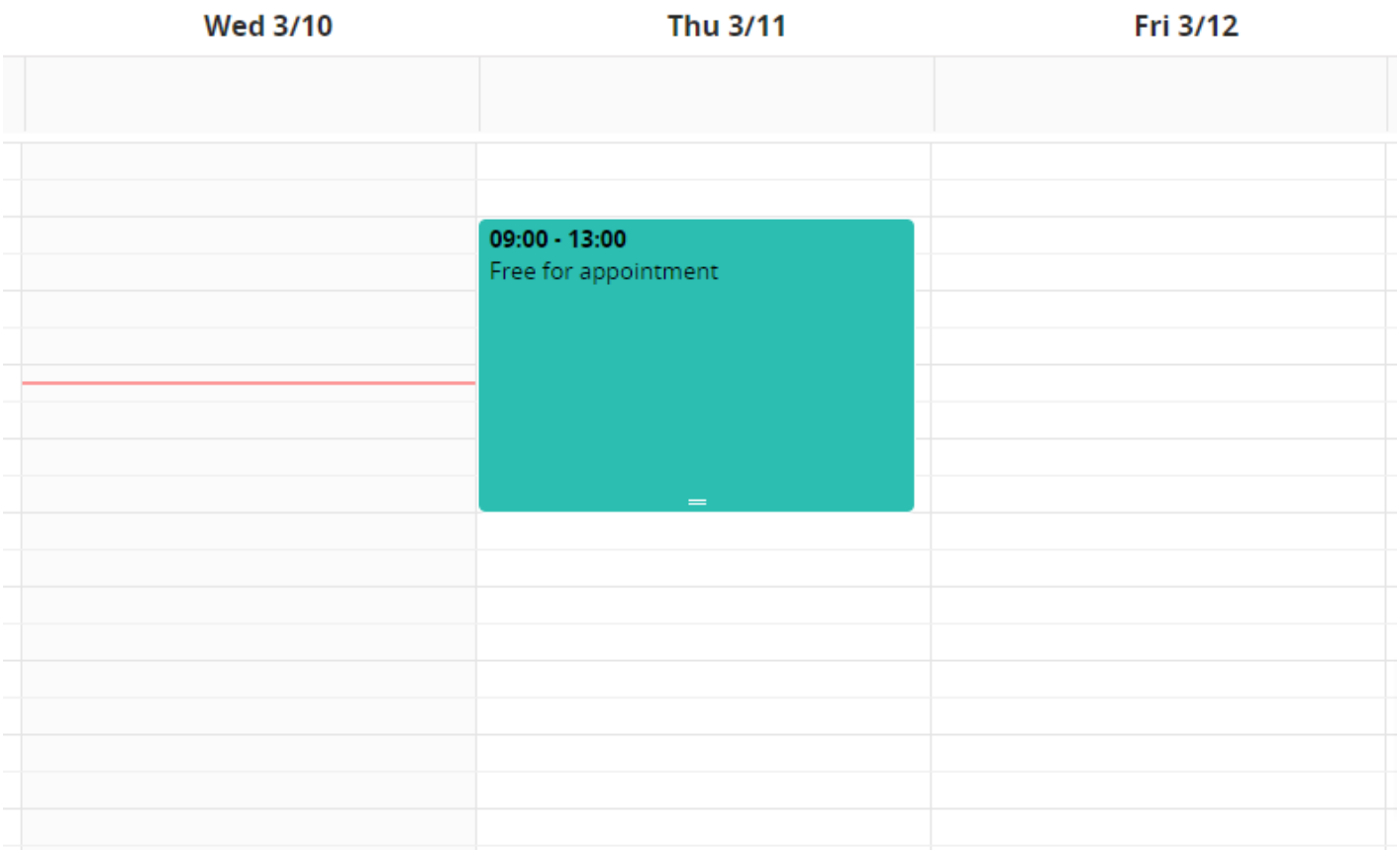
By default, the Book me function is disabled for all users. Once the specific flag is checked in user preferences, a booking link can be sent by compiling an email from the Messages module.



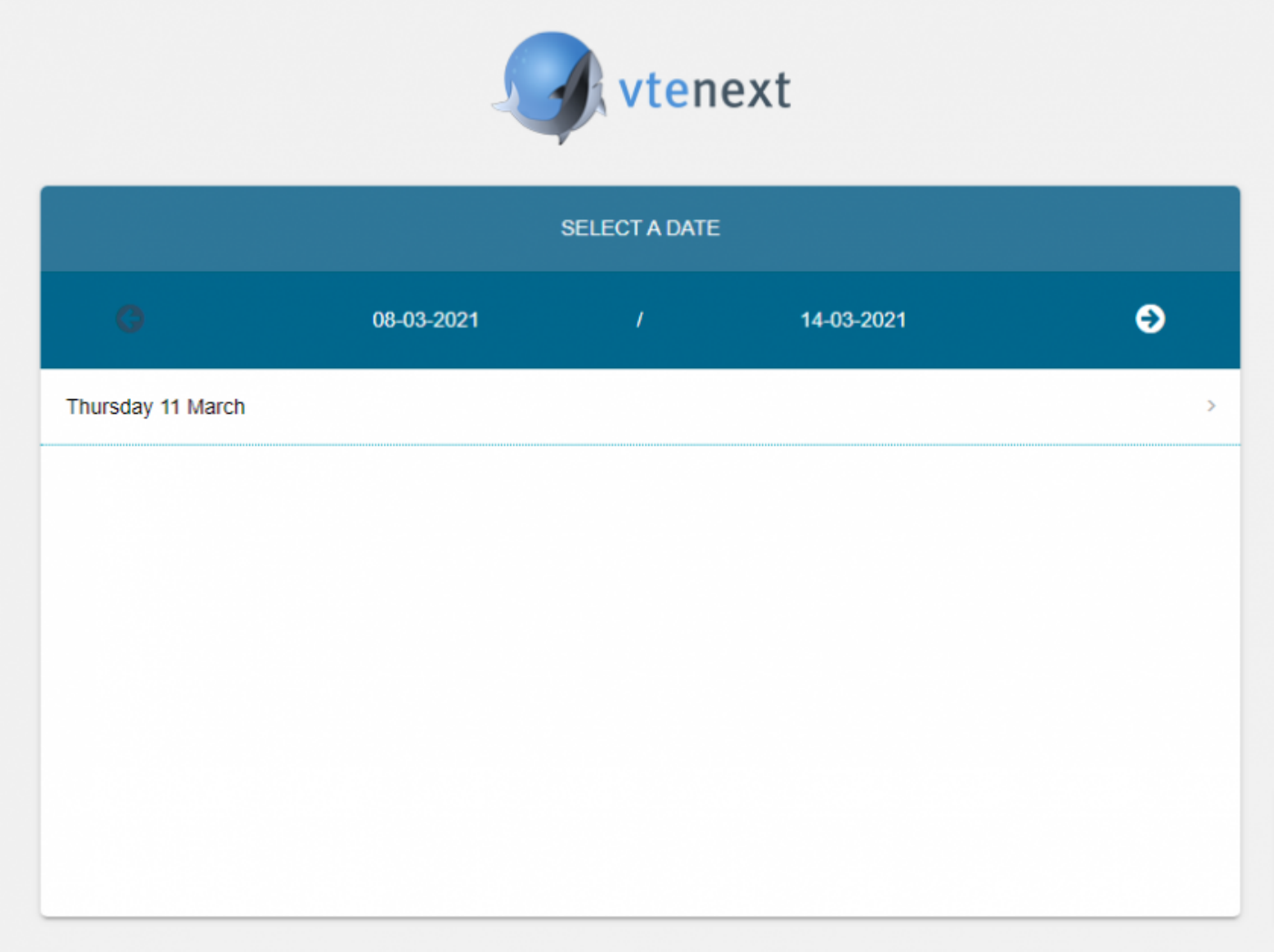
View of the Book me function from the email compilation window

Operating cycle

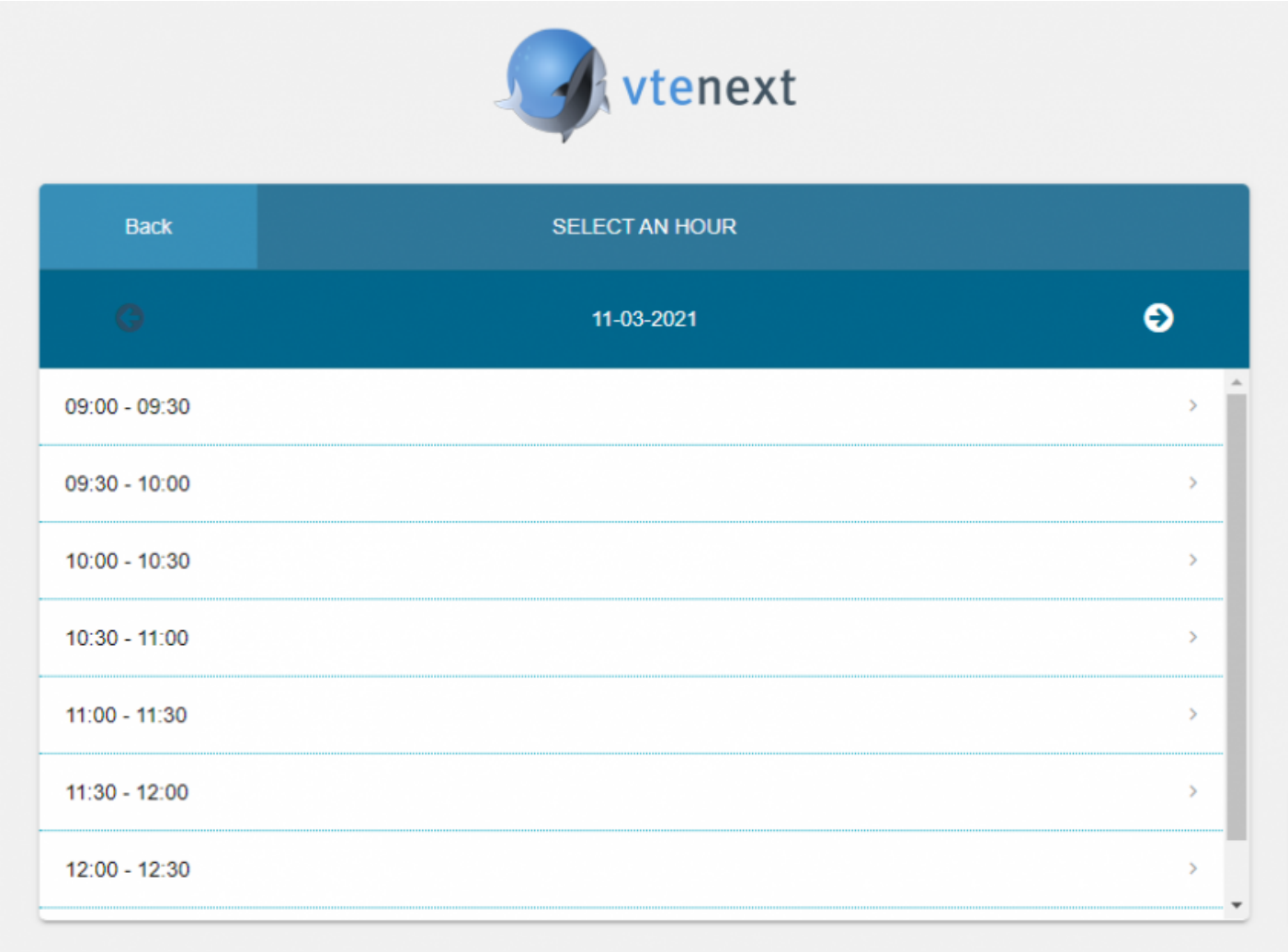
When a user sets semiautomatic mode, he/she creates a "Free for booking" type event, and an event will appear in the calendar as shown in the next image:



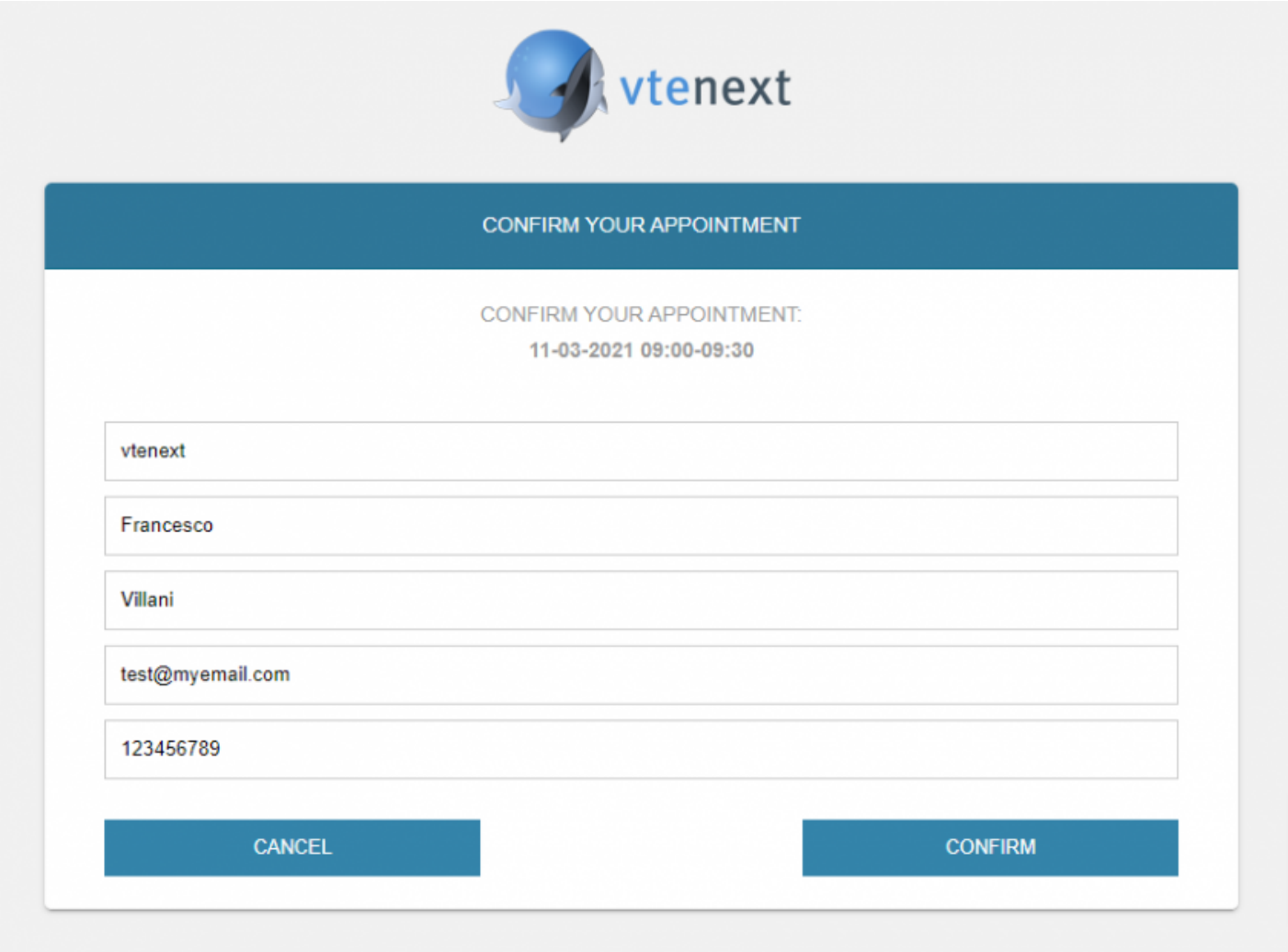
The user will then send an email with a "Book me" link as shown previously. When the recipient clicks on the link, he/she will access a dialog box in which to first select the date (if there is more than one date available) and then the preferred time slot as determined by the preferences set by the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



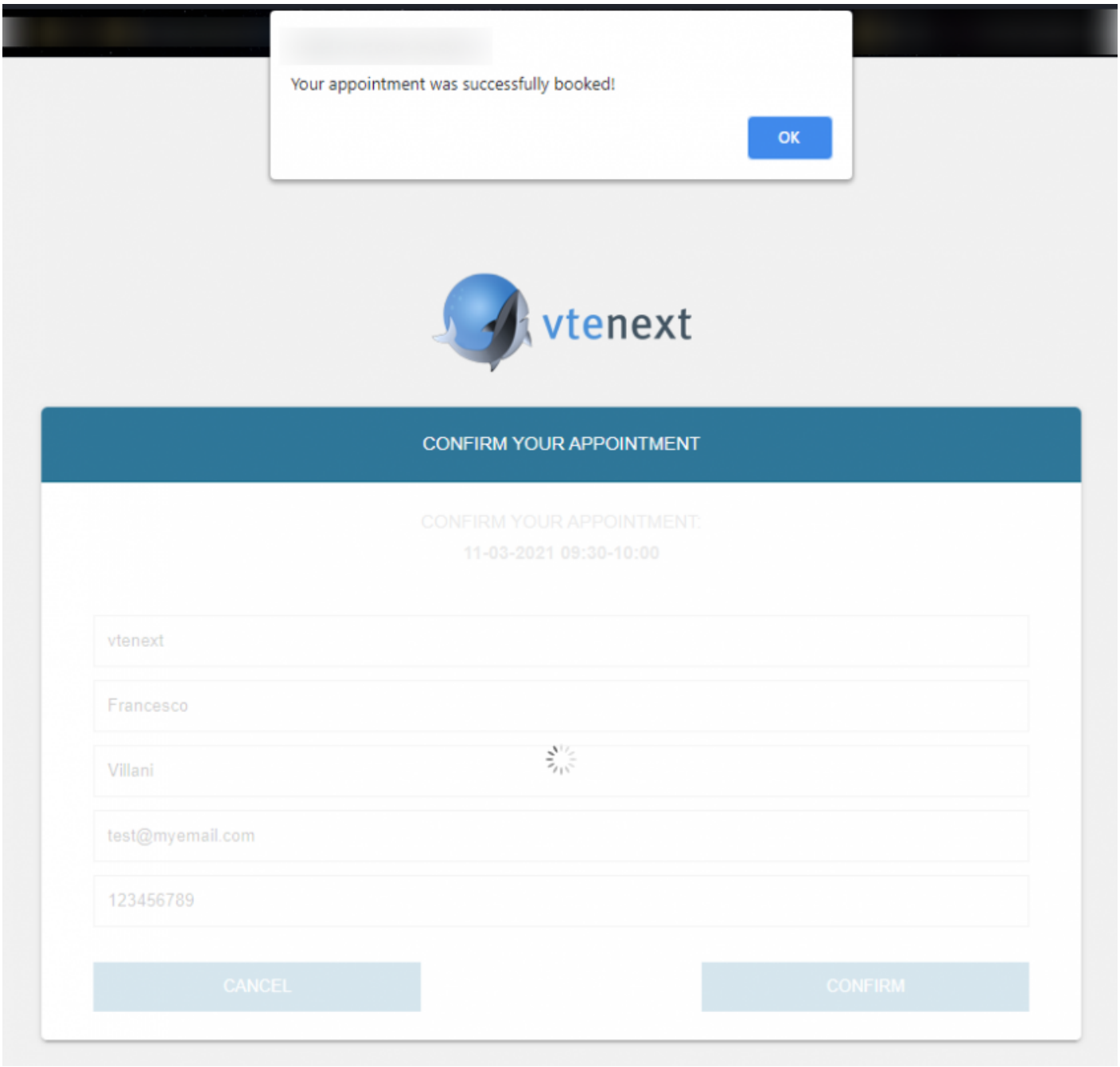
View of date selection window



View of time slot selection window



View of customer data input and booking confirmation



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.

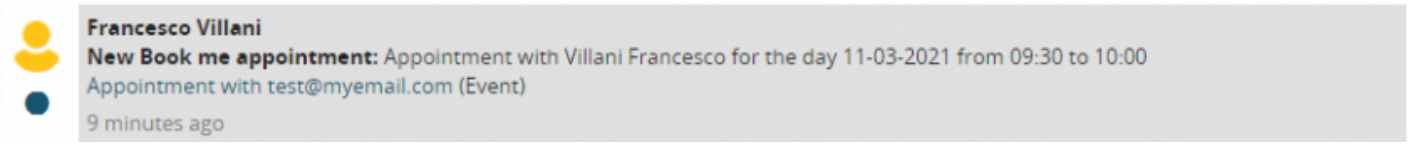
N.B.: to check the mail server configuration, refer to chapter 5.1 Outgoing mail configuration (SMTP).

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).

PAY ATTENTION:

When you send an email with the book me link, the customer won't be able to see the slots of the current day. So it is useless to create any Free for appointment events in the current day of work. Also, the language of the book me portal is the same of the language that the user has set in its preferences!



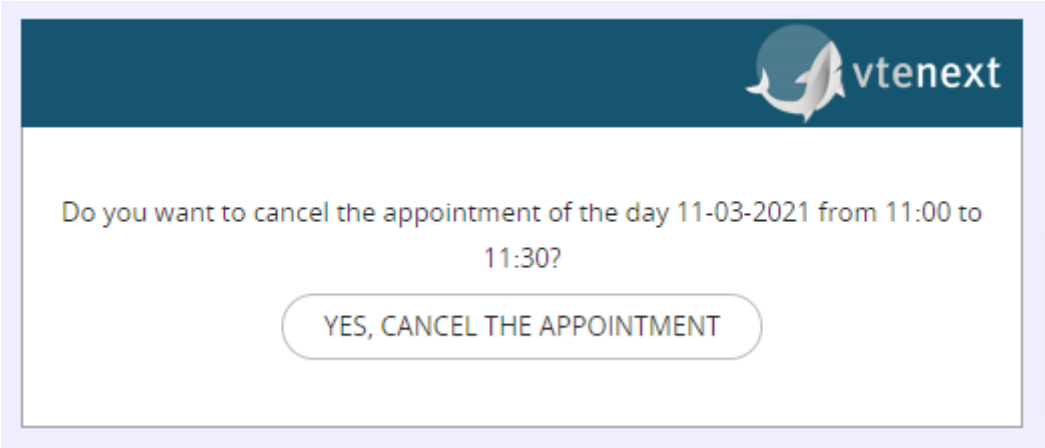
View of crm notification with booking configuration

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



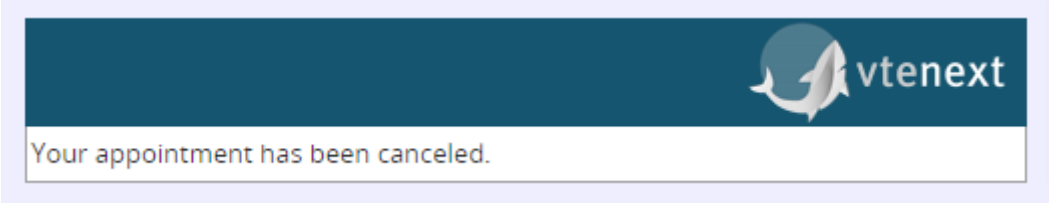
View of the email received by the customers with booking confirmation, and option to cancel it

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:



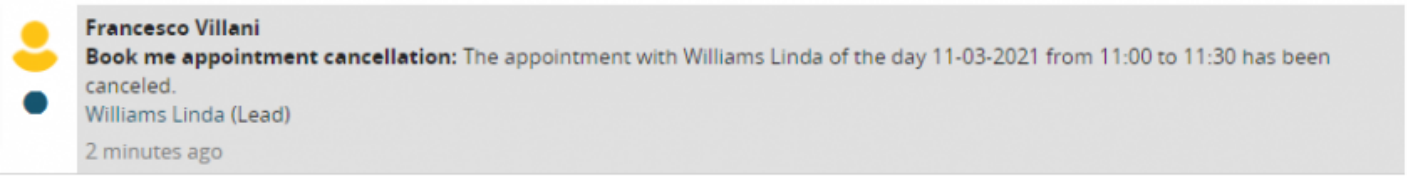
View of cancellation page (customer browser)

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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Created 14 November 2022 11:10:41 by Admin
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