

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

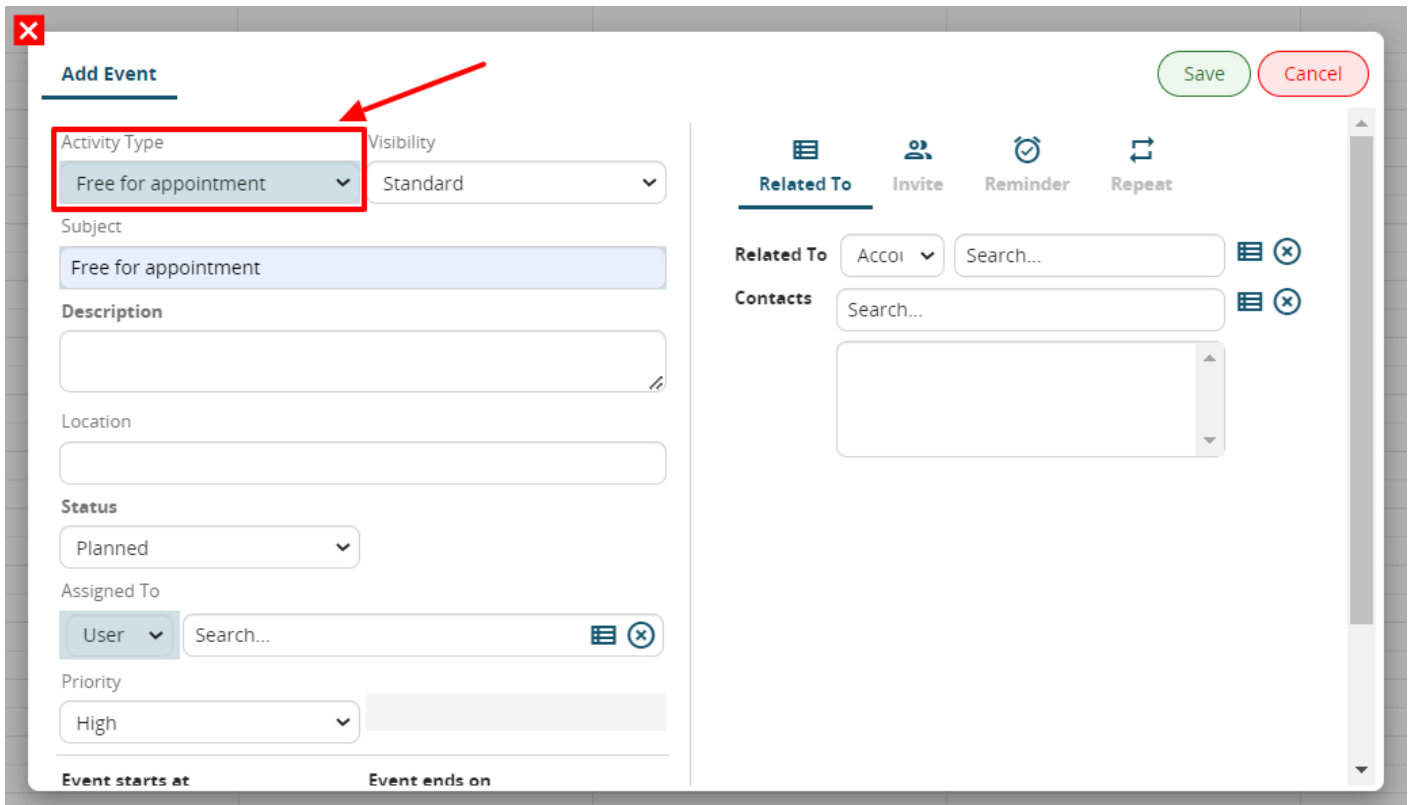
Enable Book me	Event selection mode
yes	Semiautomatic
Event duration	Minimum time between events
30 minutes	1 hour
Default in email composing	Book me url
no	https://demobenedetti.vtecrm.net/hub/bkm.php?u=VGNJaDNobFp5SFcwZnZBSUxzRk00eGlyMmhsd3g%3D

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
Book me url	it allows you to easily copy and paste the direct link to your calendar and share it

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 the "Add Event" form. The "Activity Type" dropdown is highlighted with a red box and a red arrow pointing to it. The form includes the following fields and options:

- Activity Type:** Free for appointment (highlighted)
- Visibility:** Standard
- Subject:** Free for appointment
- Description:** (Empty text area)
- Location:** (Empty text area)
- Status:** Planned
- Assigned To:** User (with search and filter icons)
- Priority:** High

On the right side, there are tabs for "Related To", "Invite", "Reminder", and "Repeat". Below these are search and filter options for "Related To" (with a dropdown menu showing "Accoi") and "Contacts".

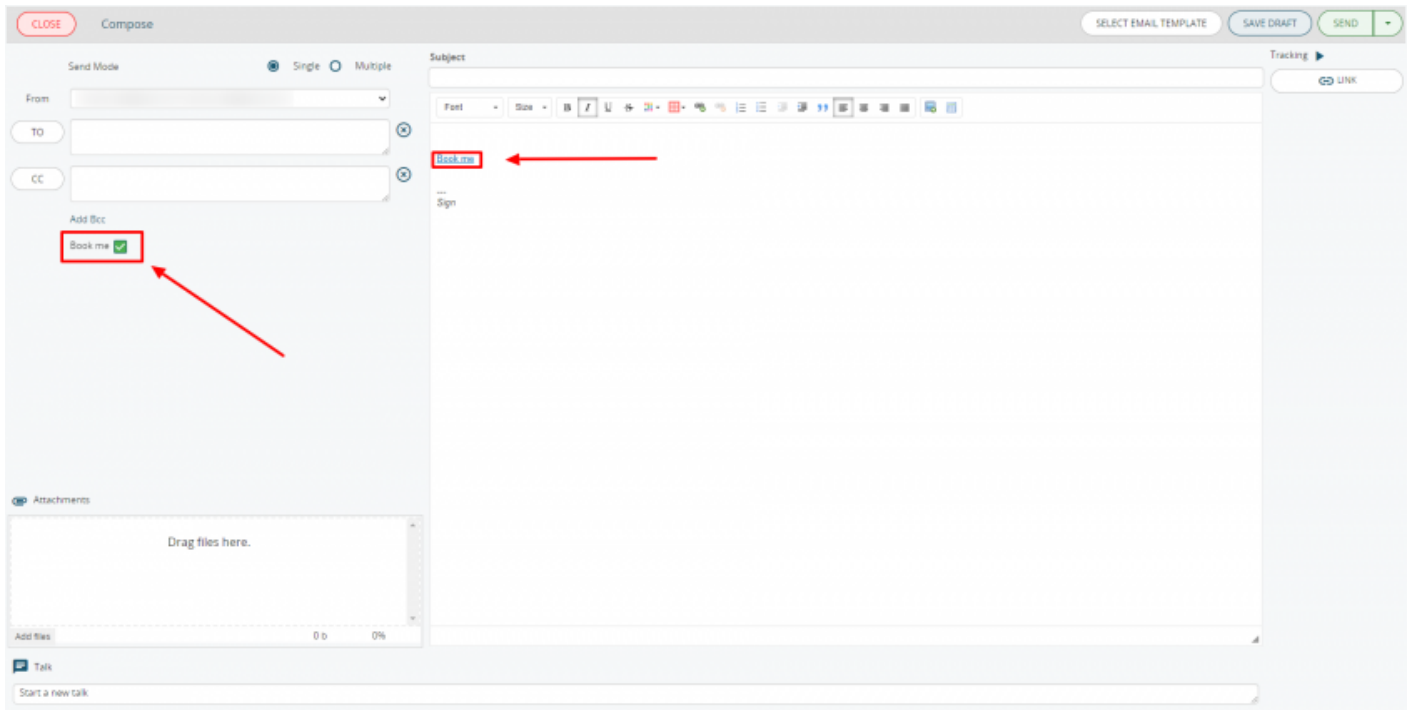
Automatic mode

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.



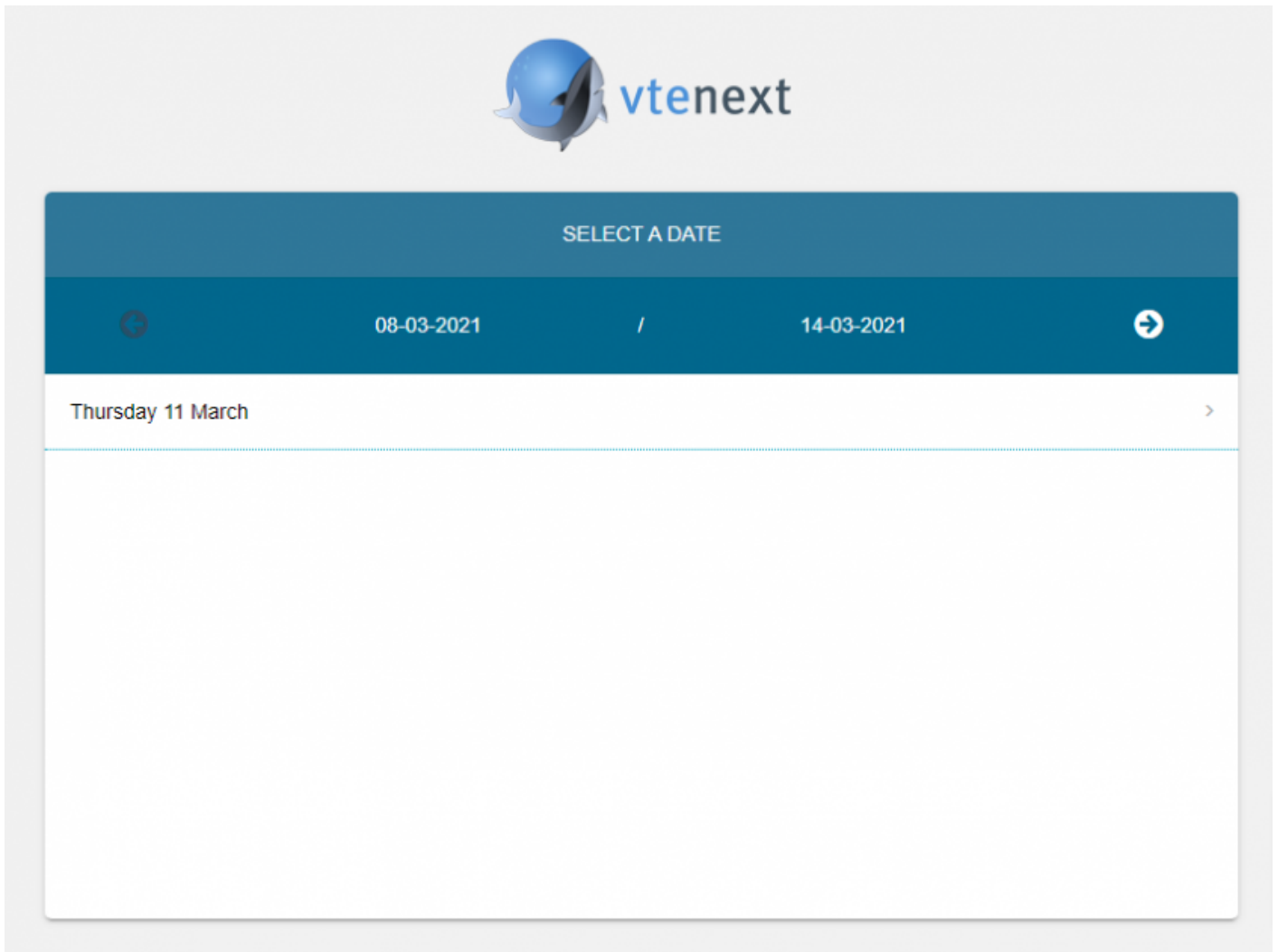
View of the Book me function from the email compilation window

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: #009688; color: white; padding: 5px;"> <p>09:00 - 13:00 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.

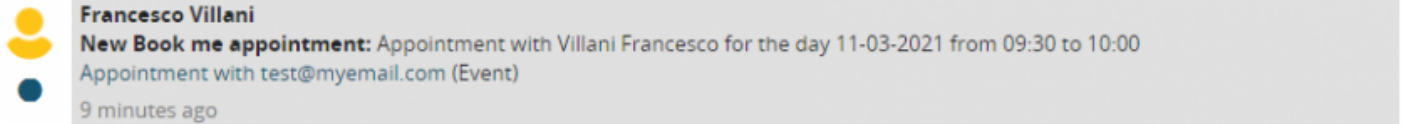
N.B.: to check the mail server configuration, refer to chapter [5.1 Outgoing mail configuration \(SMTP\)](#).

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).

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.

Confirmation of the appointment

Wednesday 10-03-2021 11:55:40



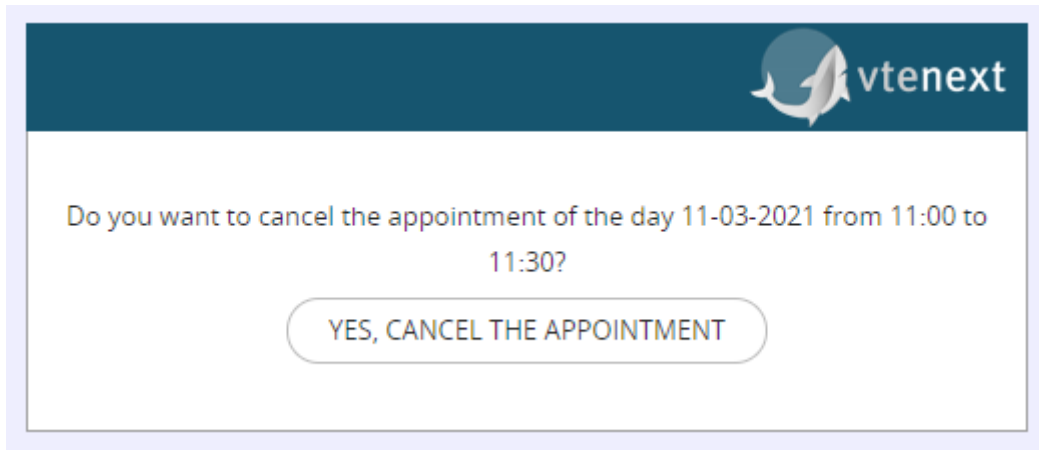
Johnson

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.

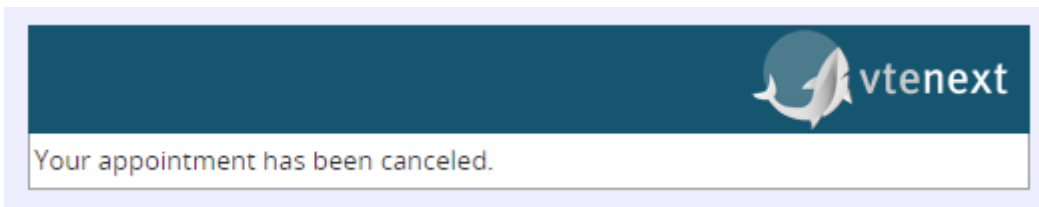
View of the email received by the customers with booking confirmation, and option to cancel it

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:



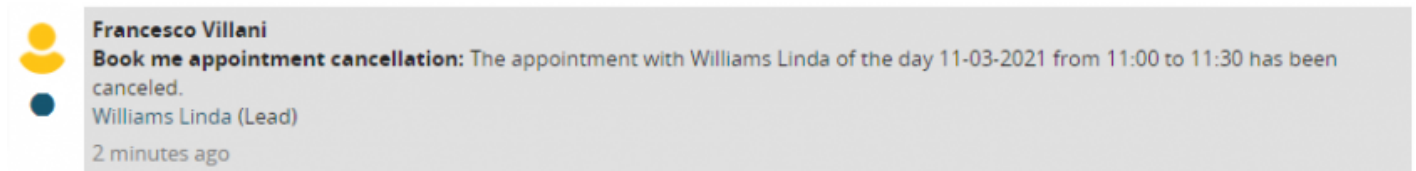
View of cancellation page (customer browser)

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

Revision #1

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