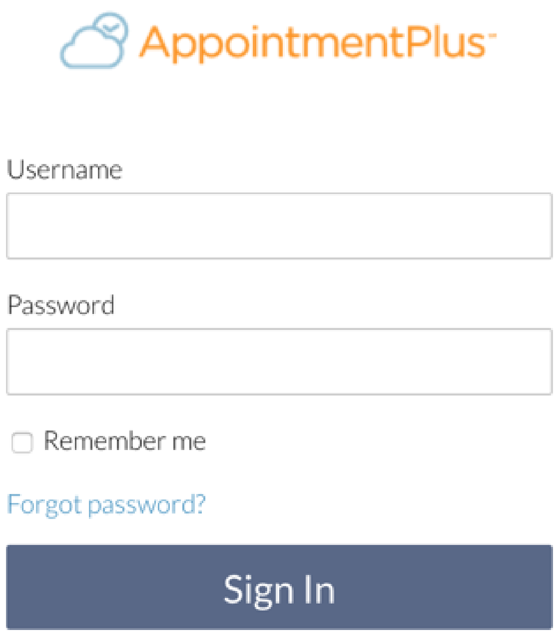
Site Administration User Guide

presented by:

AppointmentPlus™

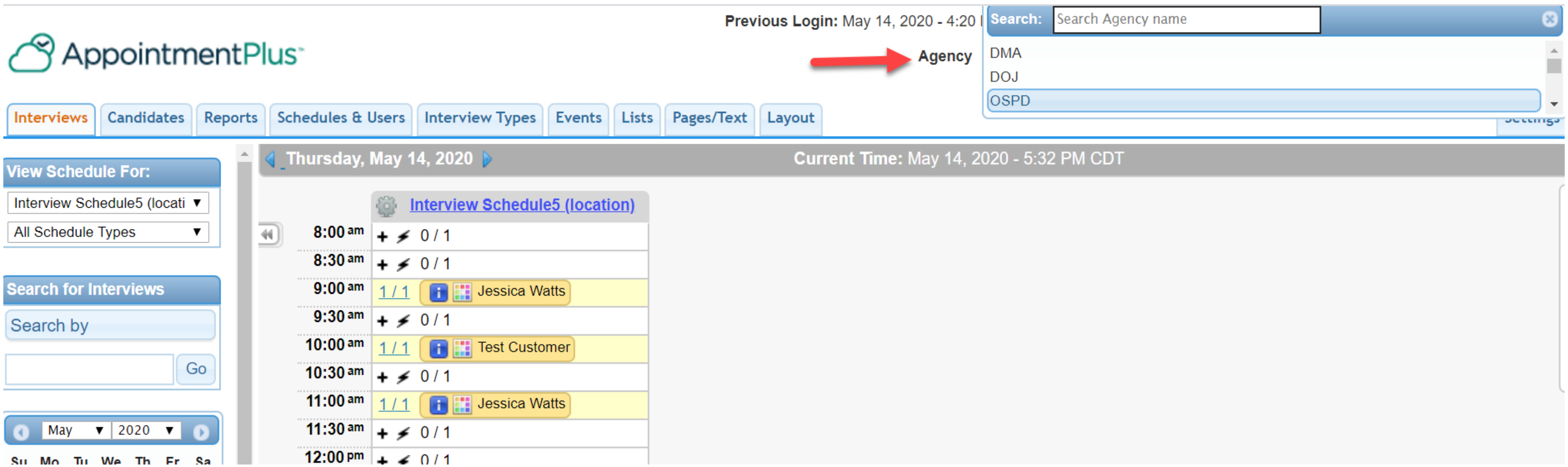
The Online Scheduling Software Experts

How to login to AppointmentPlus



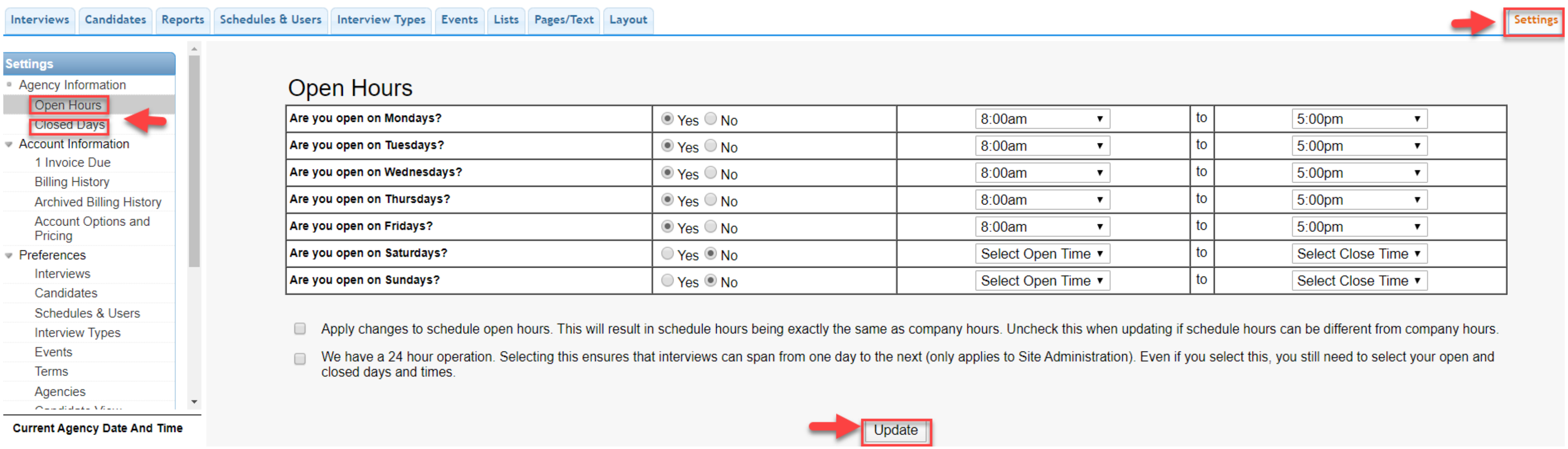
- Go to www.appointmentplus.com
- Click on **Login** at the top of the page
- Enter your login and password. Passwords are case sensitive.
- If you forget your password, use the **"Forgot password"** link in the login box and you will receive an email with password reset instructions

How to Select an Agency



1. Select the Agency at the top right.

How to Set Your Agency Open Hours & Closed Days



1. Click on Settings.
2. Click on Open Hours, set your Open & Close times, then update.
3. Click on Closed Days, check any days that the Agency is closed, then update.

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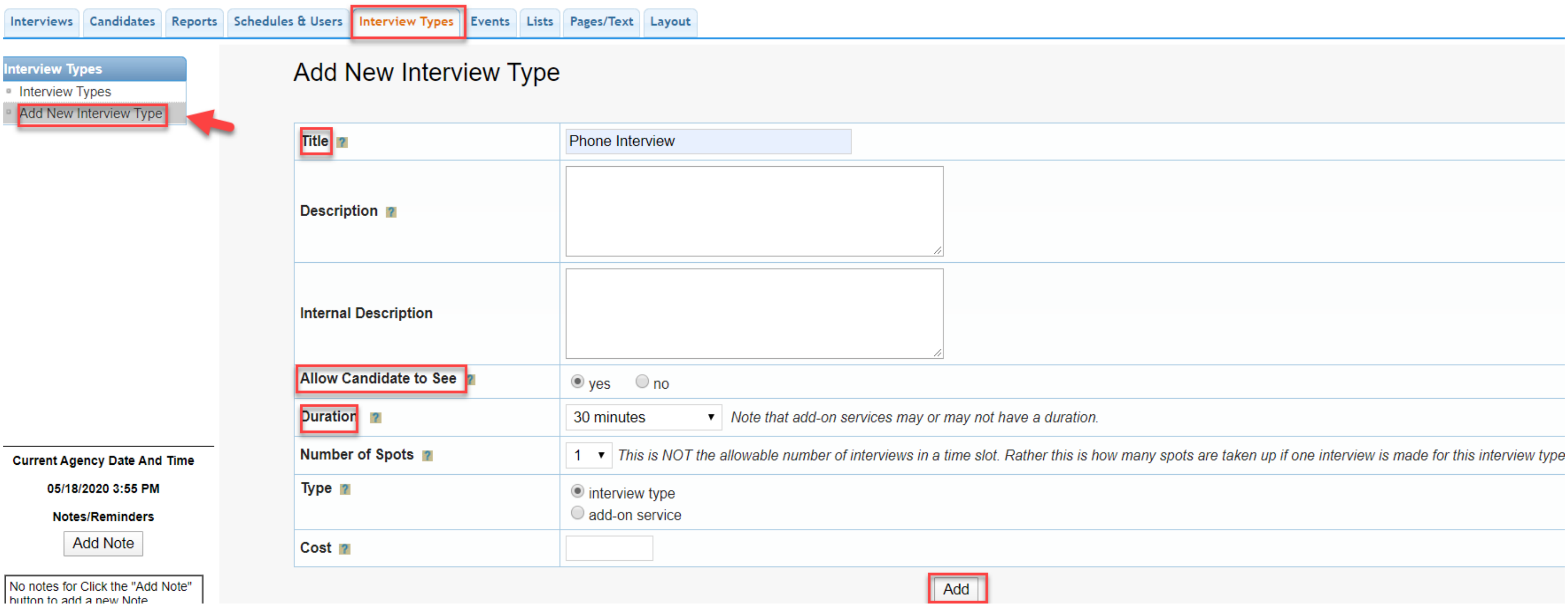
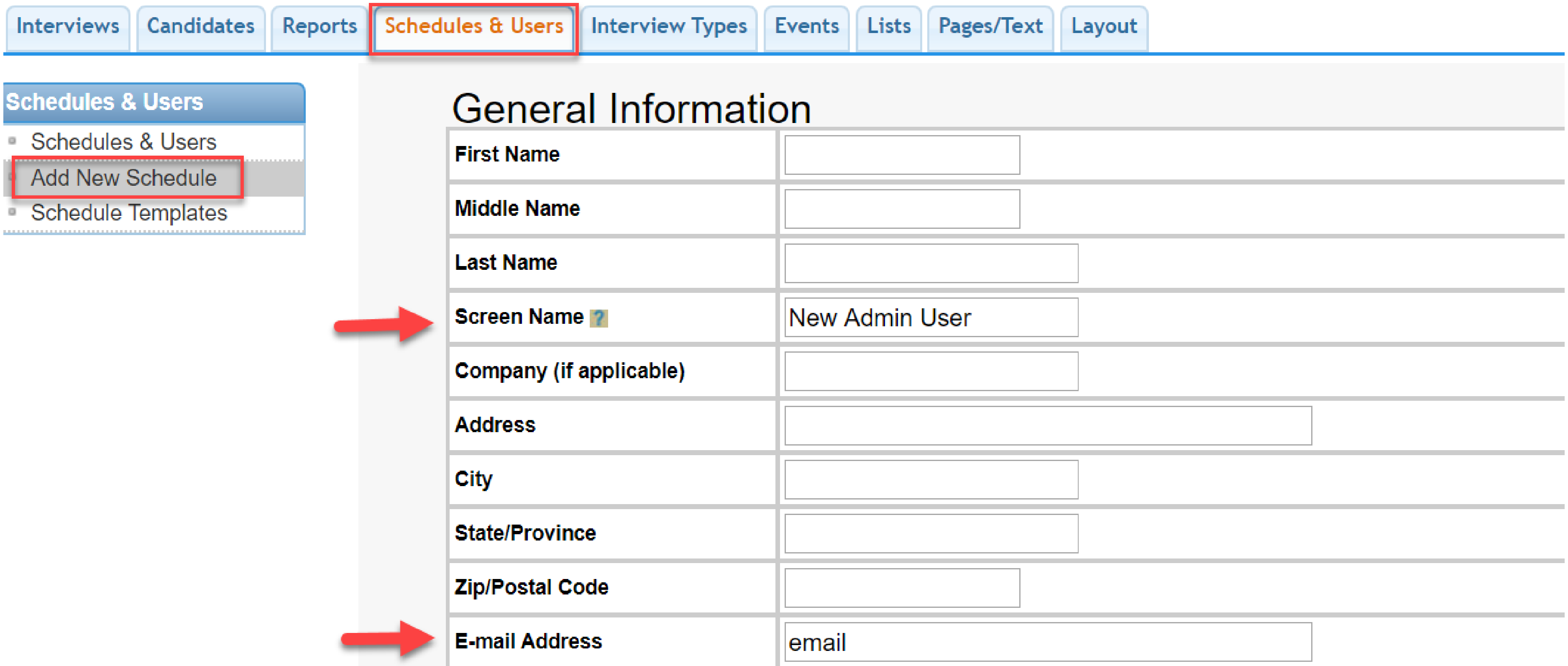
How to Add an Interview Type



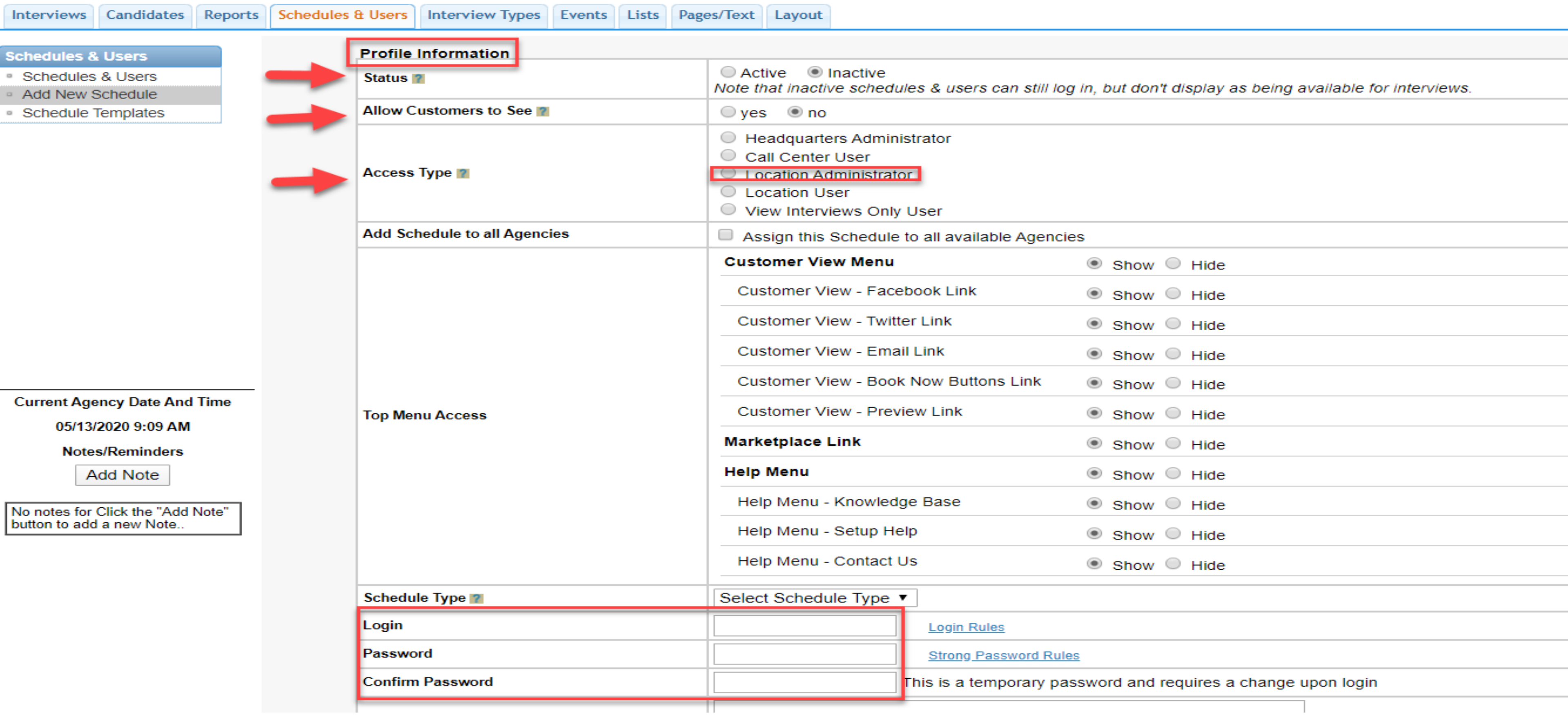
1. Click on the Interview Types tab.
2. Click on Add New Interview Type on the Left.
3. Enter the Title, Allow Candidate to See: Yes, and Duration. Click Add.

How to Add an Admin User



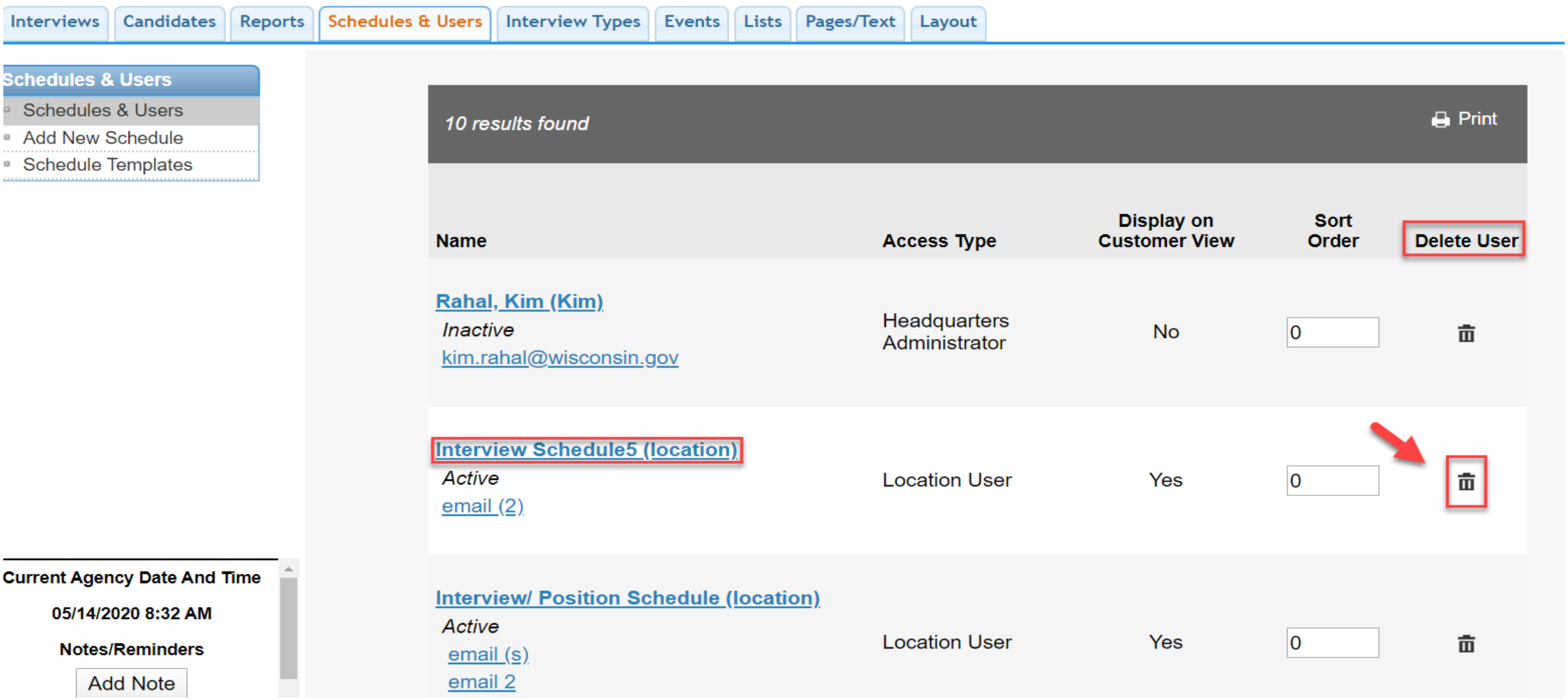
1. Click on the Schedules & Users tab.
2. Click on Add New Schedule on the Left.
3. Enter the User Name (Under Screen Name) and the User's email associated with this profile.

How to Add an Admin User Continued



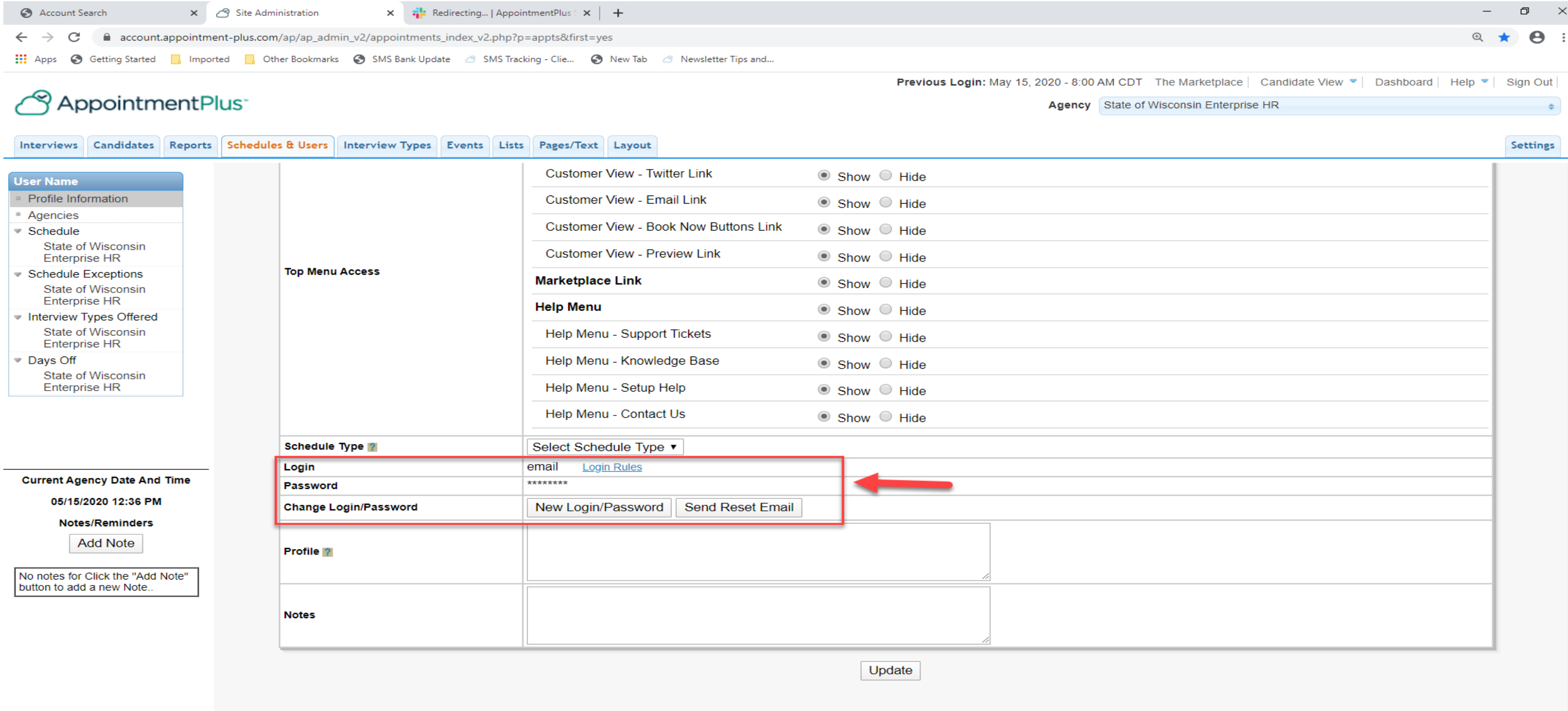
1. Set the Status To Inactive and Allow Customers to See No.
2. Select Location Administrator as the Access Type.
3. Enter the Login (Email) and Temporary Password for this User. Click Add.

How to Delete a Schedule or User



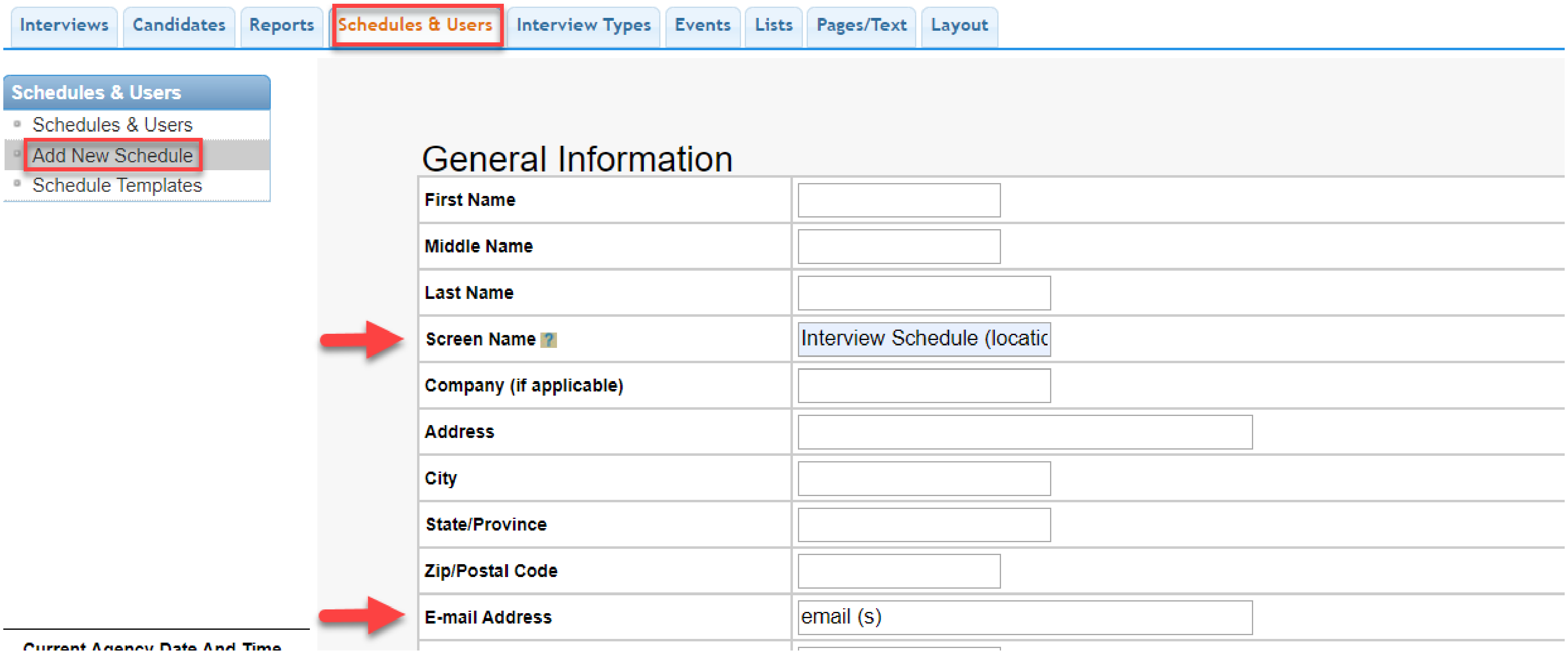
1. Click Schedules and Users.
2. Click the Delete Icon to the right of the Schedule/User.

How to Reset a User Login or Password



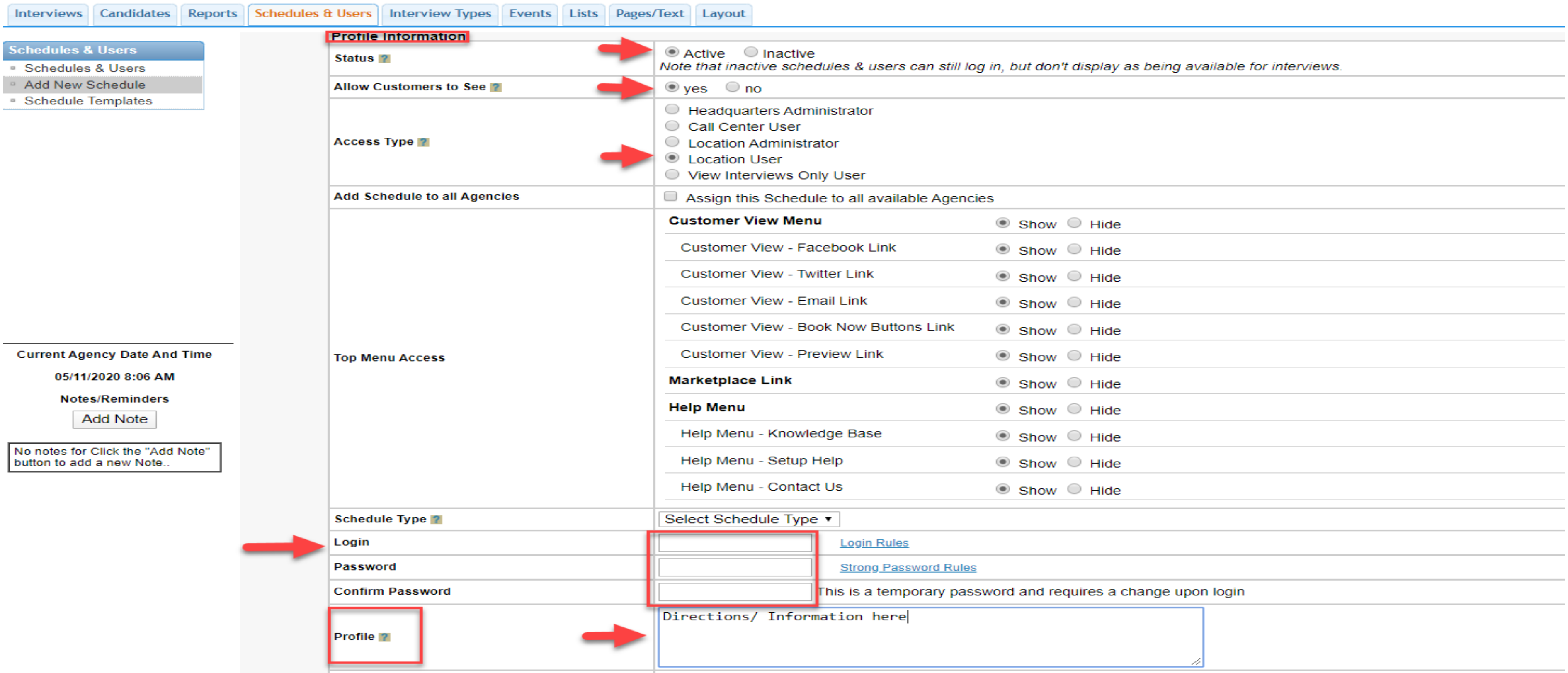
1. Click Schedules and Users, then click the User Name.
2. Scroll down to the Login and Password fields.
3. Click New Login/Password button to reset both or click Send Reset Email to send an email to the user to create a new password only.

How to Add an Interview Schedule



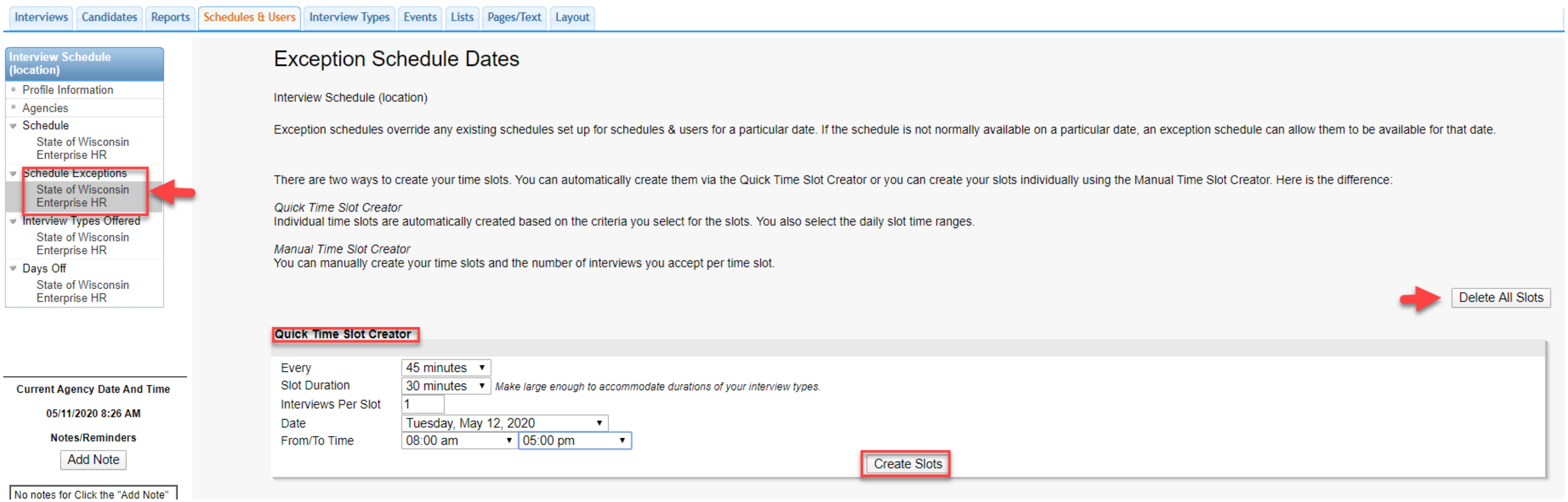
1. Click on the Schedules & Users tab.
2. Click on Add New Schedule on the Left.
3. Enter the Schedule Name (Under Screen Name) and add any emails associated with this schedule.

How to Add an Interview Schedule Continued



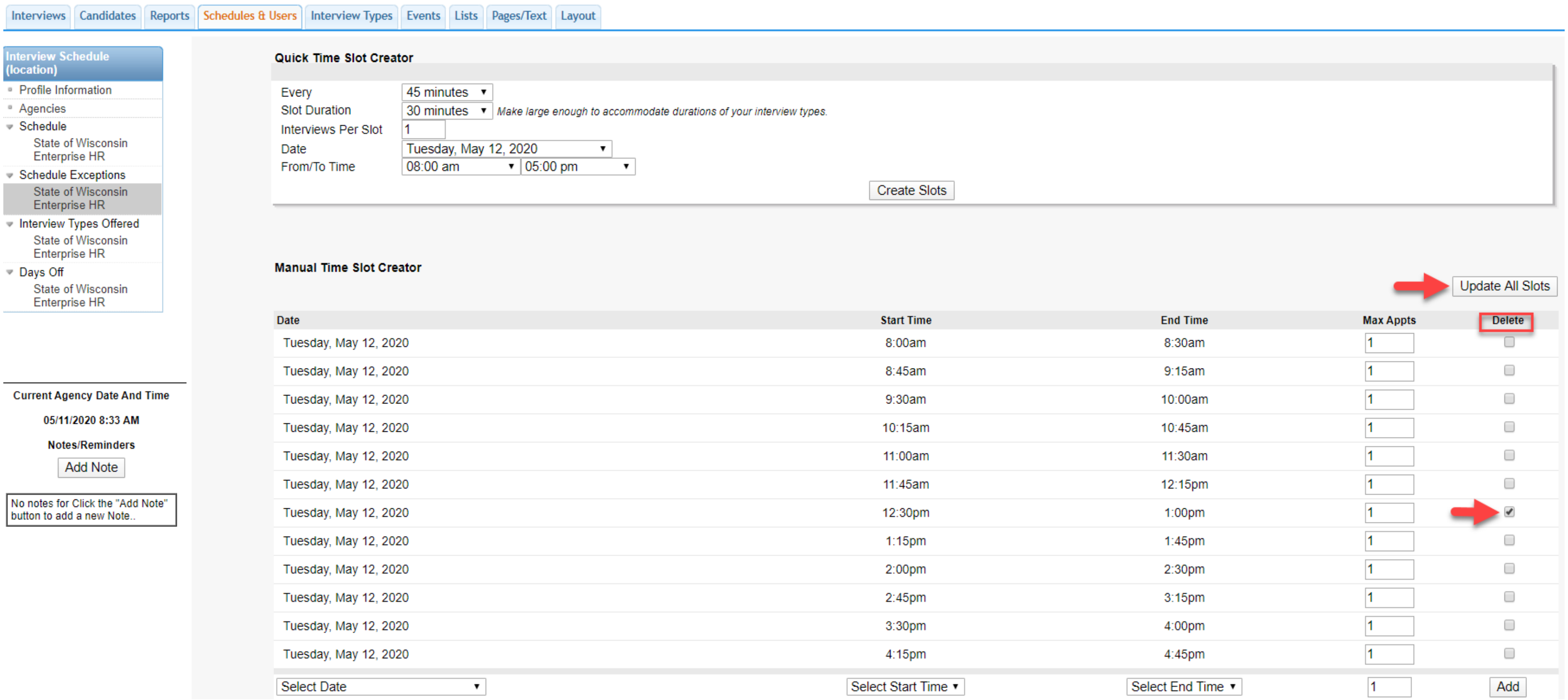
1. Set the Status To Active and Allow Customers to See Yes.
2. Select Location User as the Access Type.
3. Enter the Login and Temporary Password associated with this schedule.
4. Enter additional details in the Profile box (included in emails). Click Add.

How to Create A Schedule Exception



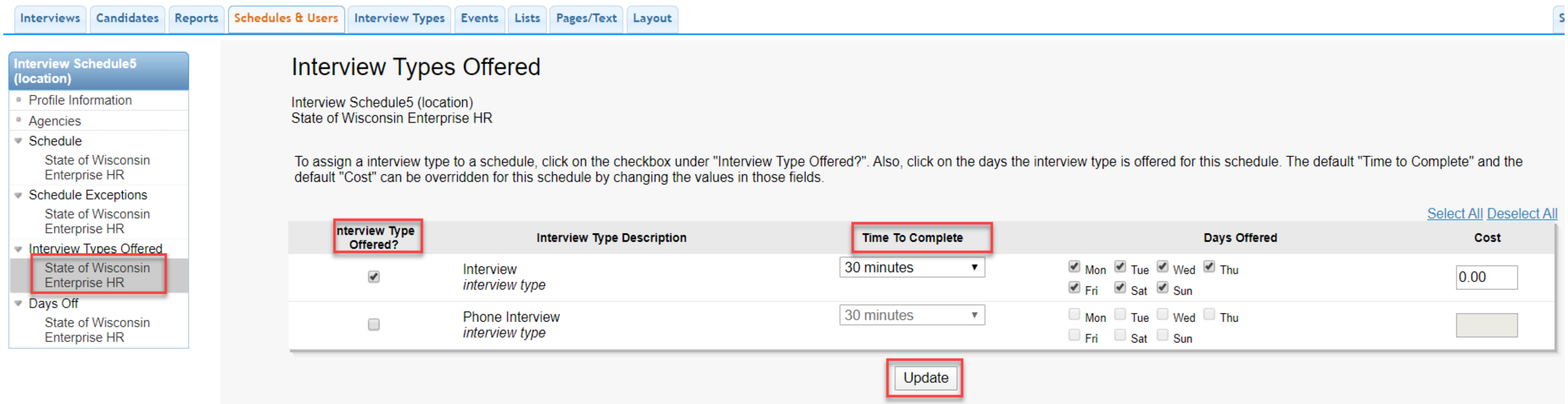
1. Click Schedule Exceptions on the upper left.
2. Select the Increment to Start, Duration of Interview, Appointments Per Slot (1), Date, Start & End Time, and Click Create Slots. This will create your Interview Schedule for a specific date. (delete all slots allows you to start over)

How to Create A Schedule Exception Continued



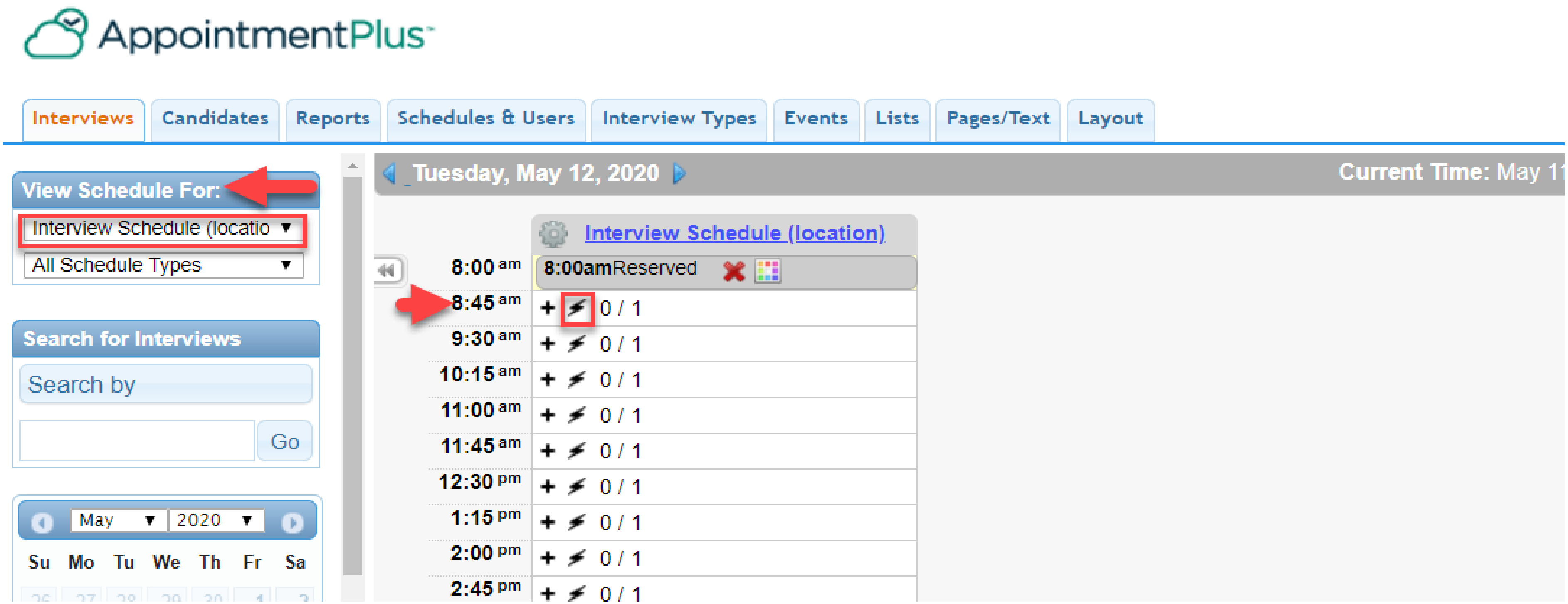
1. To create breaks, select a time slot on the right under the Delete column, then click Update All Slots and that will remove those time slots.

How to Assign an Interview Type to a Schedule



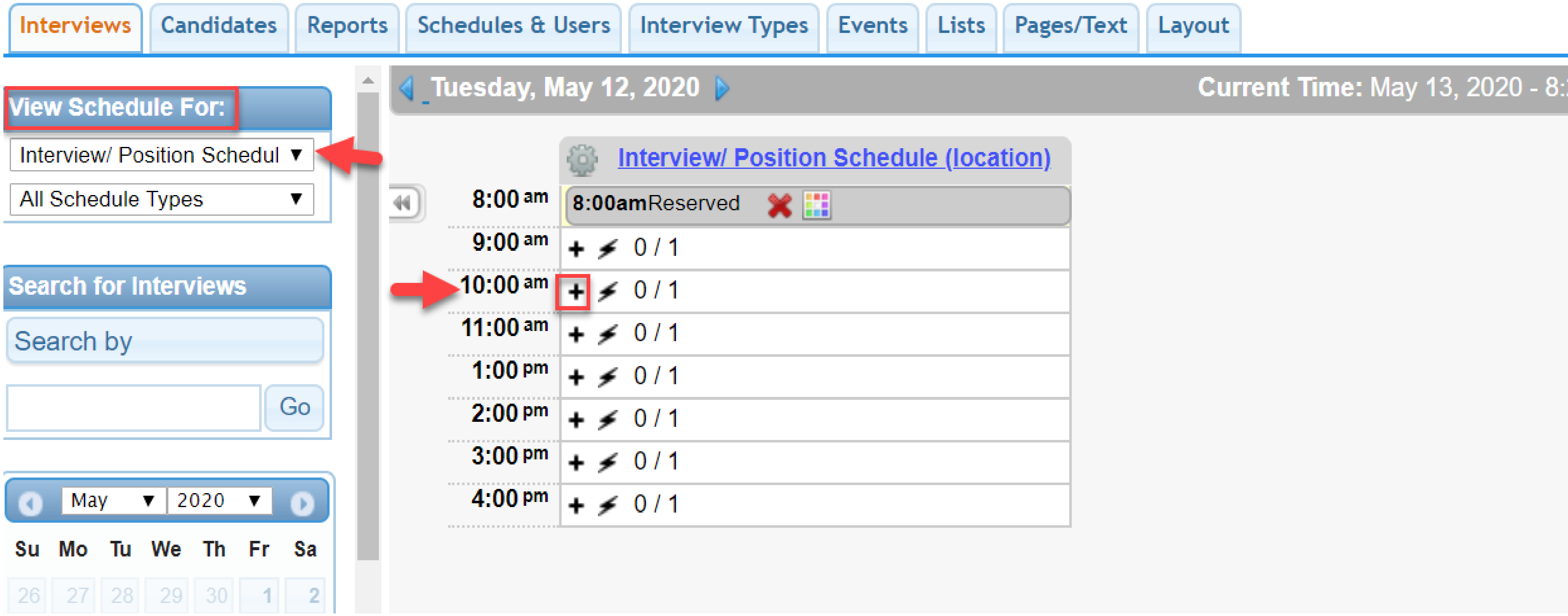
1. Click Interview Types Offered on the left.
2. Select which ones should be assigned to this schedule and the time to complete. Click Update.

How to Reserve/ Block Out Time



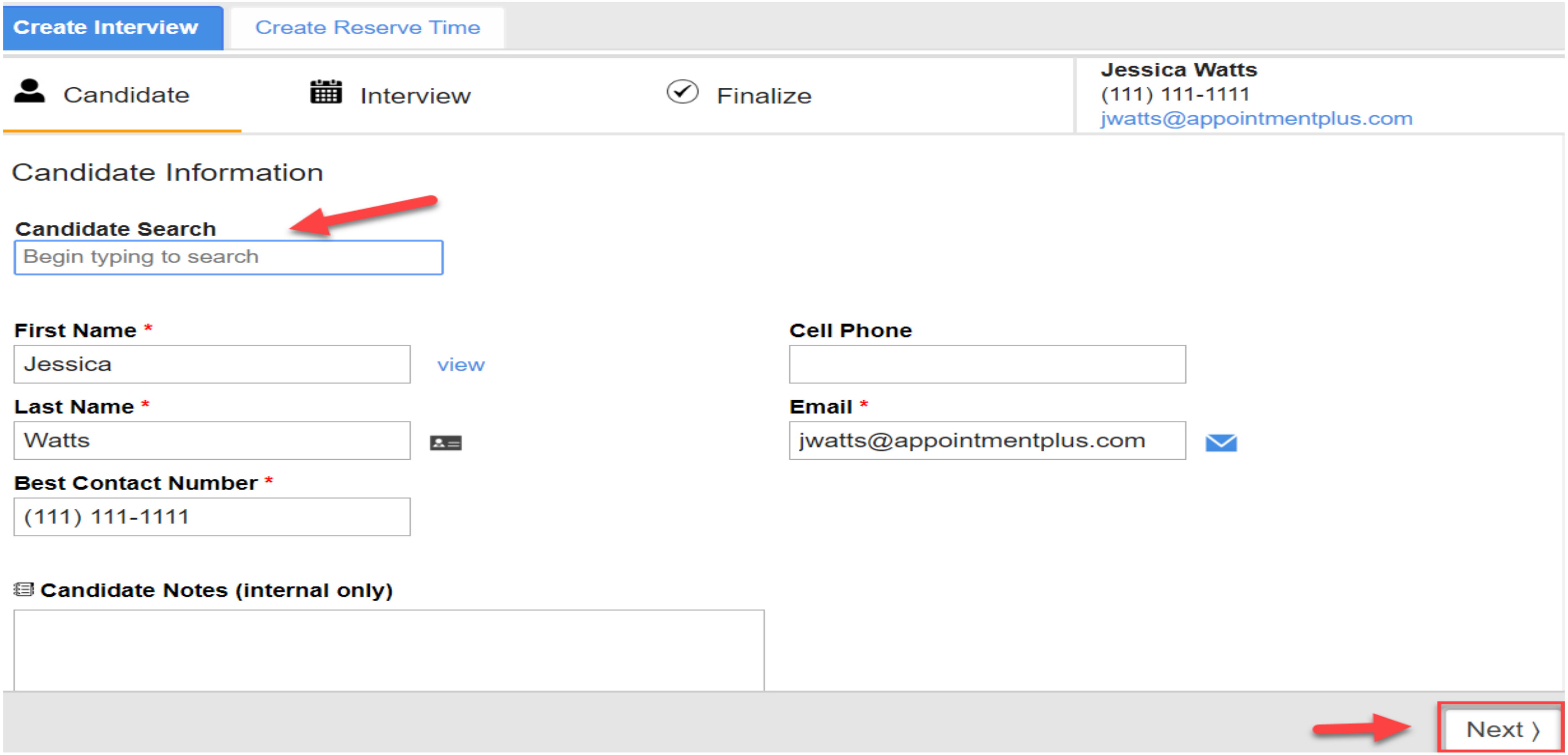
1. Select the Interview Schedule on the left.
2. Click the Lightening Bolt at a time slot and this will reserve/ block out that time slot.

How to Book an Interview On Your Calendar



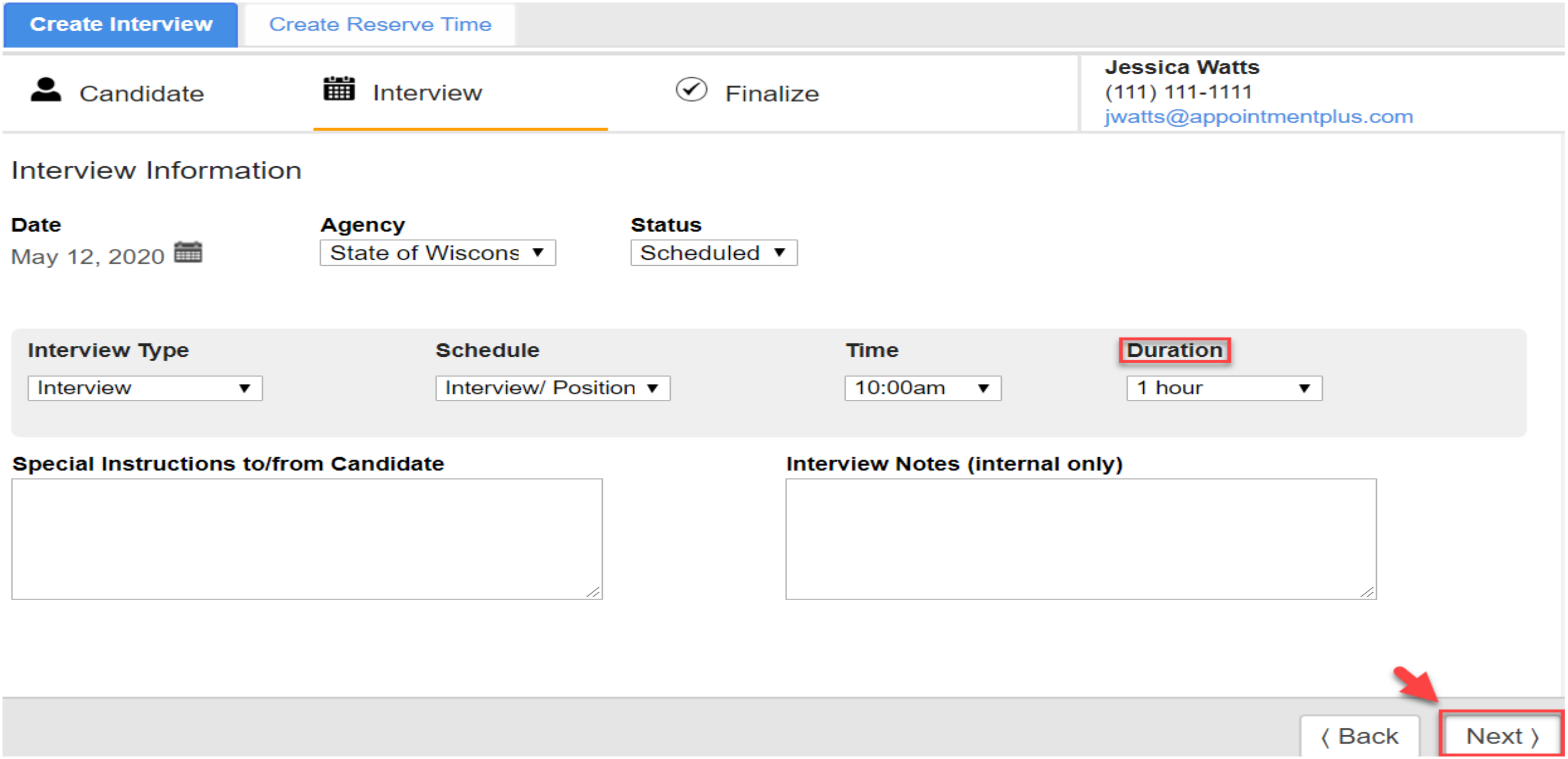
1. Click the Interviews Tab at the Top Left.
2. Select your Interview Schedule.
3. Select the Date and Time and click the “+” sign.

How to Book an Interview On Your Calendar



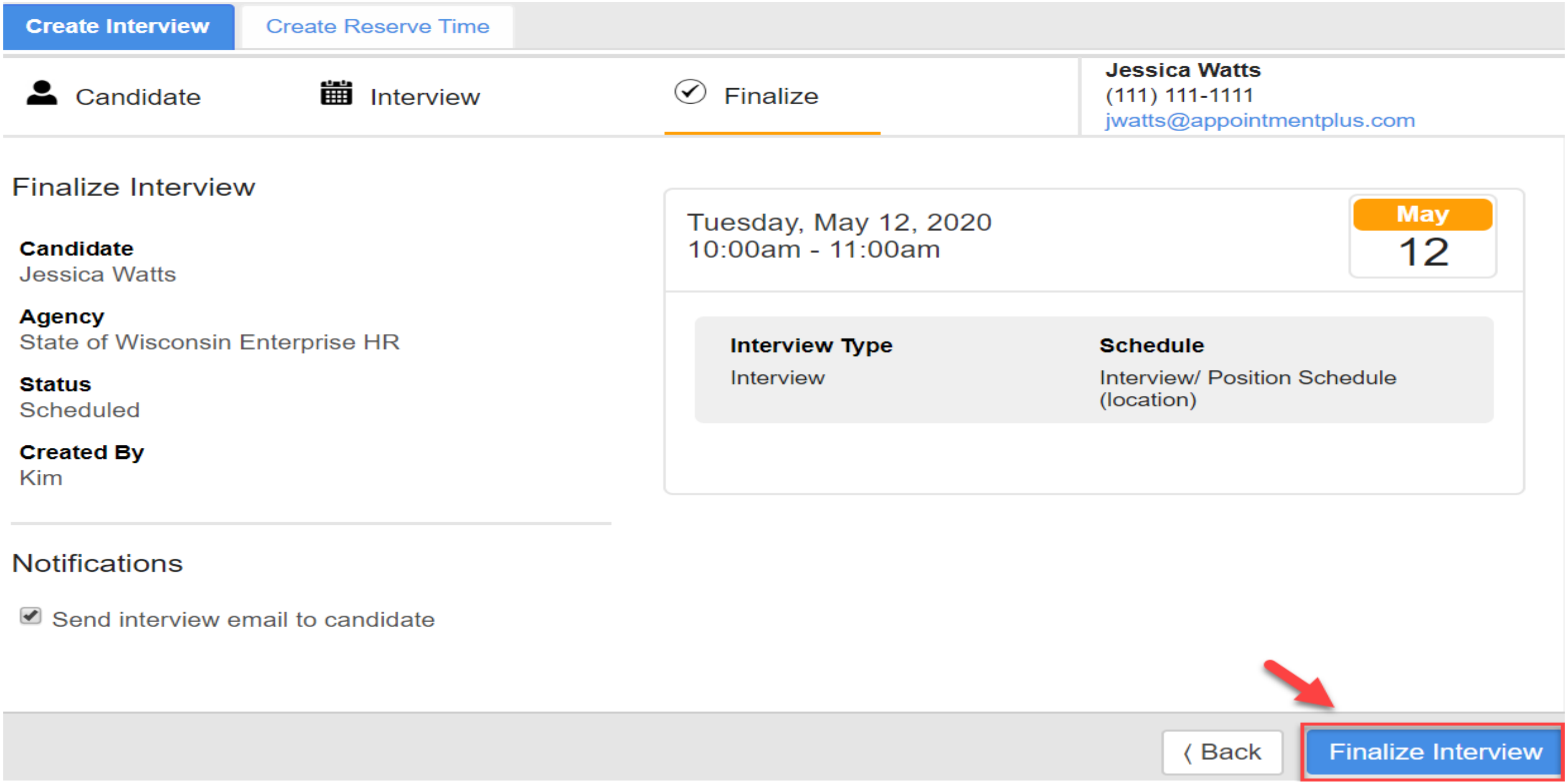
1. You can search for returning candidates or add a new candidate, then click Next.

How to Book an Interview On Your Calendar



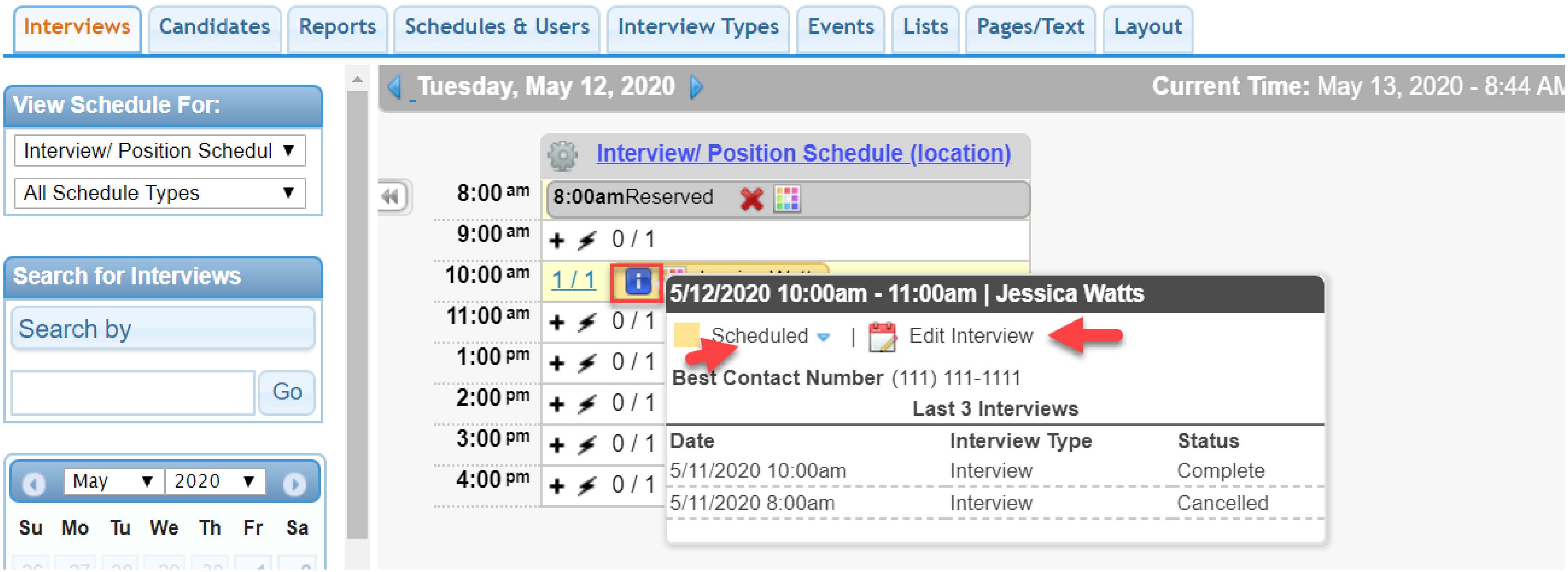
1. Verify the Interview Duration, click next.

How to Book an Interview On Your Calendar



1. Verify the Information and click Finalize Appointment.

How to Cancel or Edit an Interview



1. Hovering over the Blue Icon is quick interview information.
2. Click Edit Interview, then Cancel or Edit the Interview.

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How to Create a Link to an Interview Schedule

State of Wisconsin Enterprise HR

https://booknow.appointment-plus.com/b94cplcy/?&e_id=####

Region 1-DOA

https://book.appointment-plus.com/b951dtz0/?&e_id=####

Region 1-DPM

https://booknow.appointment-plus.com/b951xp42/?&e_id=####

Region 2-DOC

https://booknow.appointment-plus.com/b95287ky/?&e_id=####

Region 3-DATCP

https://booknow.appointment-plus.com/b952d39c/?&e_id=####

Region-3 DCF

https://booknow.appointment-plus.com/b952hsse/?&e_id=####

Region 3-DNR

https://booknow.appointment-plus.com/b952mvhg/?&e_id=####

Region 3-DWD

https://booknow.appointment-plus.com/b952rk6x/?&e_id=####

1. These are the starting Agency links.

How to Create a Link to an Interview Schedule

Region 4-DHS

https://booknow.appointment-plus.com/b953h2mq/?&e_id=####

Region 4-DVA

https://booknow.appointment-plus.com/b953lsbs/?&e_id=####

Region 4-DOR

https://booknow.appointment-plus.com/b953qv10/?&e_id=####

DMA

https://booknow.appointment-plus.com/b9541jk2/?&e_id=####

DOJ

https://booknow.appointment-plus.com/b9546z94/?&e_id=####

OSPD

https://booknow.appointment-plus.com/b95cxsyx/?&e_id=####

WHS

https://booknow.appointment-plus.com/b95cnntk/?&e_id=####

WTS

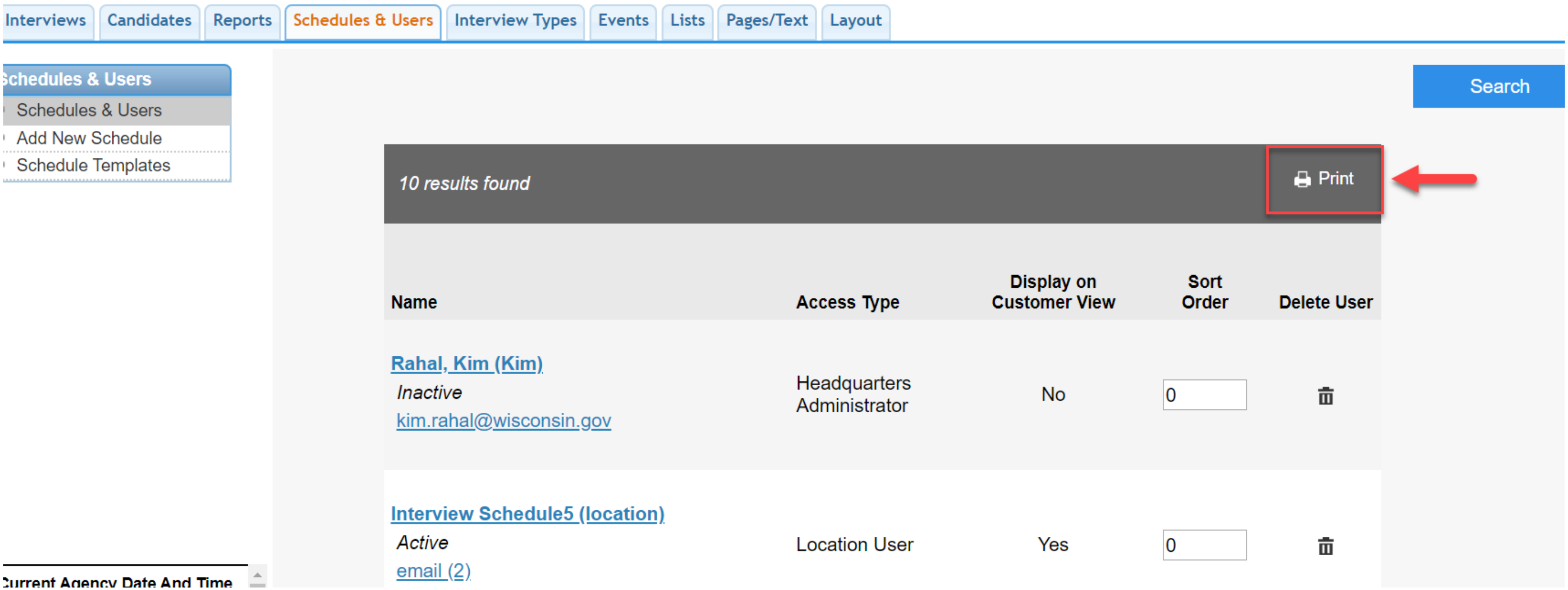
https://booknow.appointment-plus.com/b95csjxm/?&e_id=####

1. These are the starting Agency links.

Instructions for Creating Schedule Links

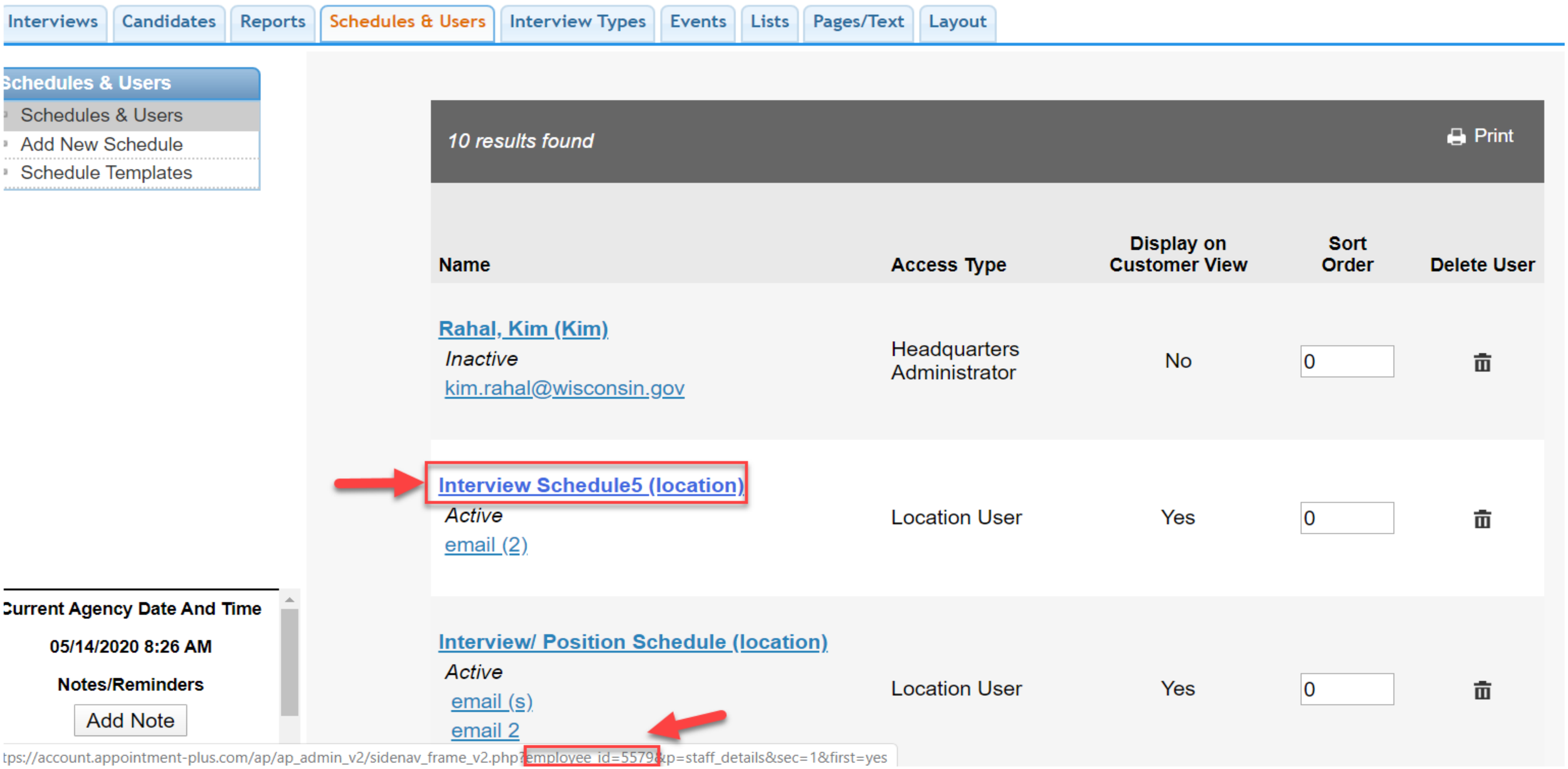
https://apptplus.zendesk.com/hc/en-us/articles/215148823-Custom-Customer-View-Links

How to Get the 4-Digit Schedule Code (Print Icon)



1. Under Schedules & Users Tab click the Print Icon.
2. Select Screen Name and Schedule ID (e_id) and click create list.

How to Get the 4-Digit Schedule Code



1. Hover Over the Schedule Name.
2. The Schedule Code is at the bottom of the screen: employee_id=####.

Update Text on Candidate Booking Page

Interviews | Candidates | Reports | Schedules & Users | Interview Types | Events | Lists | Pages/Text | Layout

Current Agency Date And Time

05/15/2020 12:42 PM

Notes/Reminders

Add Note

No notes for Click the "Add Note" button to add a new Note..

Custom Text Areas on Front End

Page Name	Description
Appointments	On the front end, displays on the right side in the Welcome box after the candidate logs in. If you are not requiring candidates to log in, it displays on the right side when the interview first accesses the site.
Appointments - top	On the front end, this text displays at the top, above the interview Locator and Welcome boxes. This text displays throughout the entire interview process.
Cancellation Instructions	On the front end, displays above the candidate's existing interviews. The Existing interviews box displays on the right side and only displays if the candidate has at least one future interviews.
Confirmed Instructions	On the front end, displays after the candidate has selected a time slot.
Credit Card Instructions	On the front end, if you are prompting candidates for payment, this text displays above the credit card information fields.
Final Instructions	On the front end, displays after the interview is finalized.
Login Header	On the front end, displays on the login page, above the Login/Password boxes and the Registration button. If you are not requiring interviews to log in, this does not display.
Option to Pay Instructions	On the front end, if you are prompting candidates for payment and giving them the option to pay, this text displays above the prompt to select if they want to pay now or later.
Registration Header	On the front end, displays at the top of the registration page. If you require candidates to log in, when they click on the Registration button, this text displays at the top of that page. If you are not requiring candidates to log in, this text displays after the candidate selects an open time, above the candidate fields they have to enter.
Special Instructions	On the front end, displays as the label for the Special Instructions box. The Special Instructions box displays after the candidate has selected a time slot.
Wait List Confirmation	On the front end, if you are using the Waiting List feature, displays after the candidate has placed themselves on the waiting list.
Wait List Instructions	On the front end, if you are using the Waiting List feature, this text displays at the top of the Waiting List page.

Header Text for Interviews Page in Admin

Page Name	Description
Appointment Page Header	In Site Administration, displays at the top of the Interview page.
Make/View Appointment Header	In Site Administration, displays at the top of the Make Interview box. The Make Interview box displays after you click on an open time slot. It also displays at the top of the Interview Detail box. That box displays when you click on an existing interview.

Update

1. Click Pages/Text Tab.
2. Click Appointments link, update your instructions here for that location, then click Update.

Candidate Booking Page

Interview Locator

Date

May 2020						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
					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						

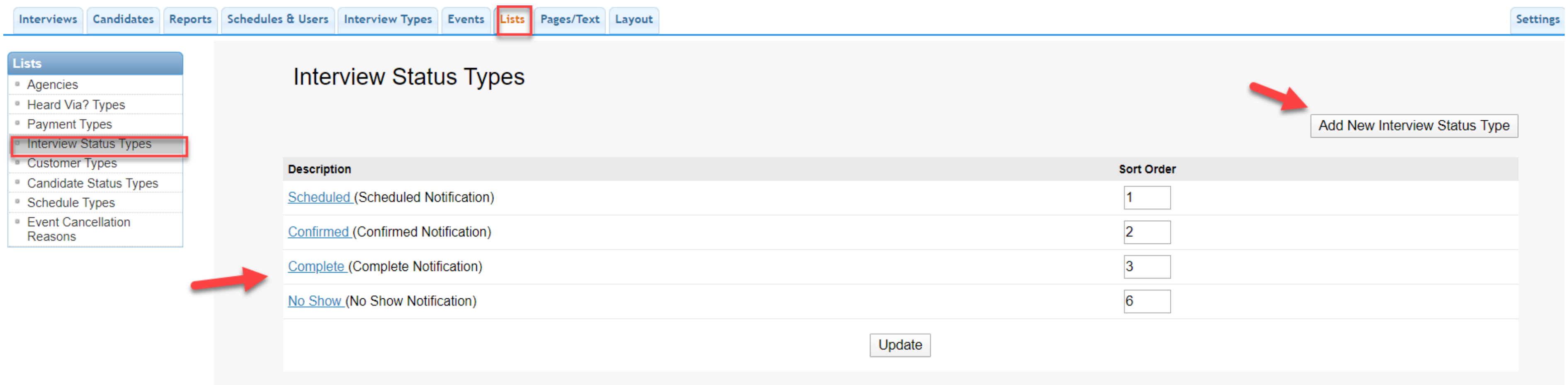
Select Interview Time

Interview Schedule5 (location)

Monday, May 18, 2020	8:00am	Book it
Monday, May 18, 2020	8:30am	Book it
Monday, May 18, 2020	9:00am	Book it
Monday, May 18, 2020	9:30am	Book it
Monday, May 18, 2020	10:00am	Book it
Monday, May 18, 2020	10:30am	Book it

1. Candidate will click on the link, select the date, time, and enter their contact details, then finalize.
2. A Confirmation email will be sent.

Adding/Changing Interview Status Types



1. Click Lists at the top.
2. Click Interview Status Types on the left.
3. You can edit existing statuses, or add new.

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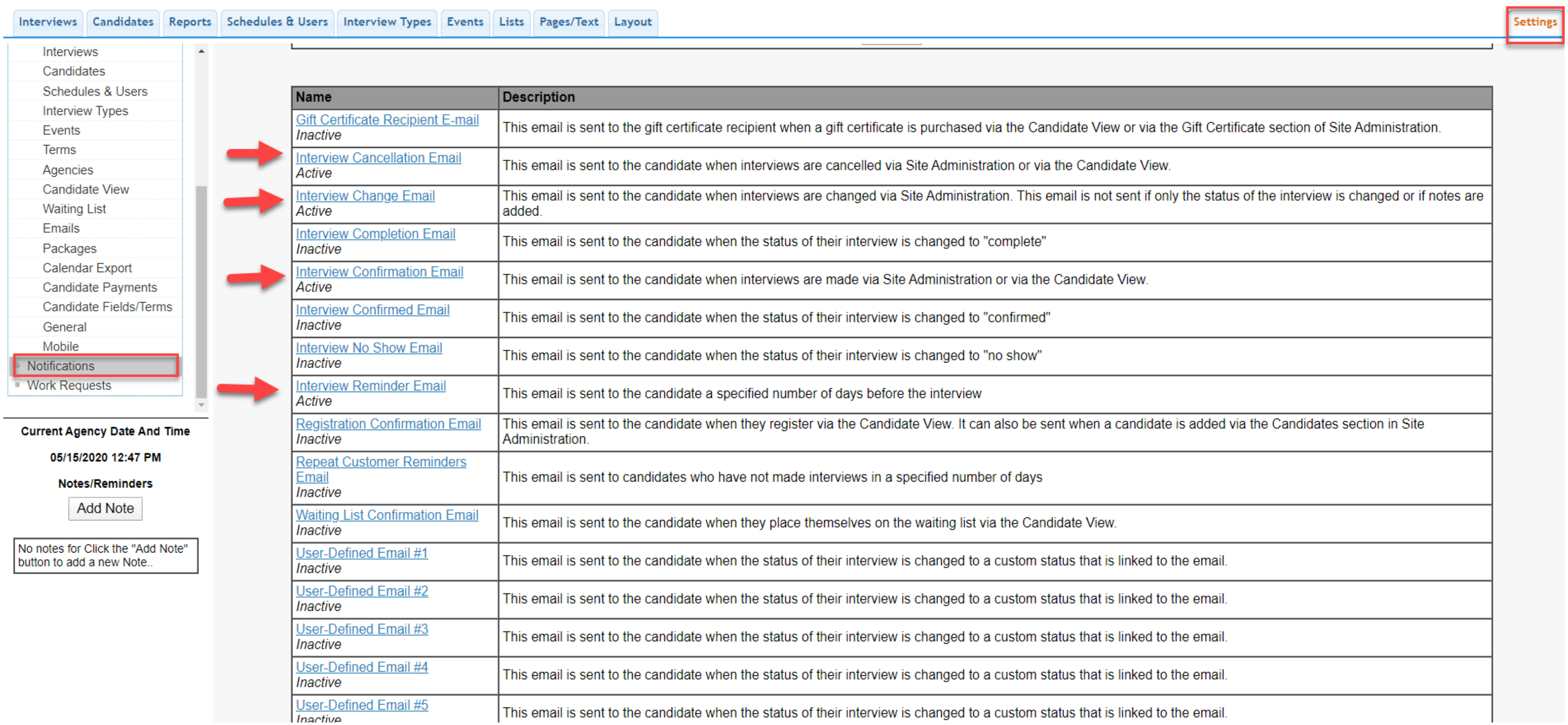
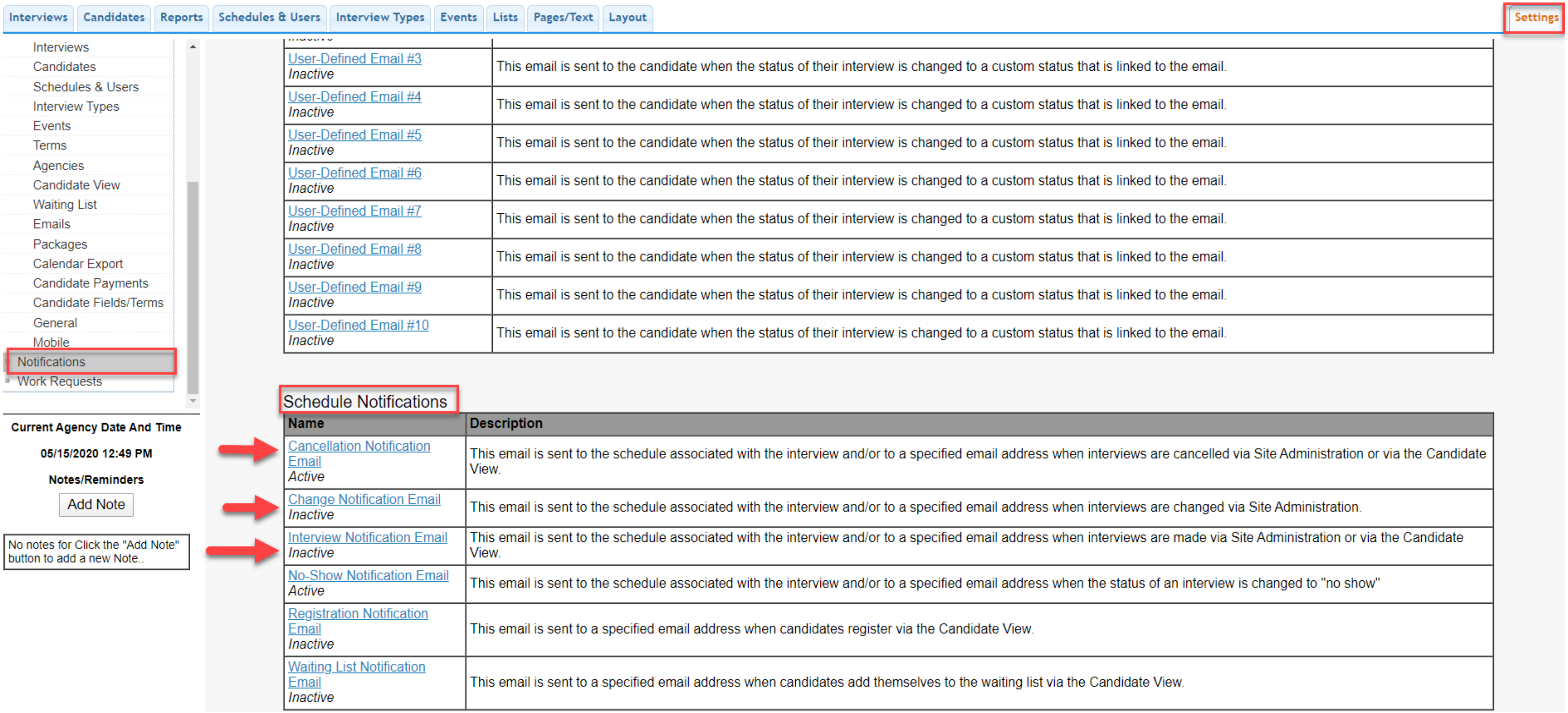
Candidate Email Templates



Name	Description
Gift Certificate Recipient E-mail *Inactive*	This email is sent to the gift certificate recipient when a gift certificate is purchased via the Candidate View or via the Gift Certificate section of Site Administration.
Interview Cancellation Email *Active*	This email is sent to the candidate when interviews are cancelled via Site Administration or via the Candidate View.
Interview Change Email *Active*	This email is sent to the candidate when interviews are changed via Site Administration. This email is not sent if only the status of the interview is changed or if notes are added.
Interview Completion Email *Inactive*	This email is sent to the candidate when the status of their interview is changed to "complete"
Interview Confirmation Email *Active*	This email is sent to the candidate when interviews are made via Site Administration or via the Candidate View.
Interview Confirmed Email *Inactive*	This email is sent to the candidate when the status of their interview is changed to "confirmed"
Interview No Show Email *Inactive*	This email is sent to the candidate when the status of their interview is changed to "no show"
Interview Reminder Email *Active*	This email is sent to the candidate a specified number of days before the interview
Registration Confirmation Email *Inactive*	This email is sent to the candidate when they register via the Candidate View. It can also be sent when a candidate is added via the Candidates section in Site Administration.
Repeat Customer Reminders Email *Inactive*	This email is sent to candidates who have not made interviews in a specified number of days
Waiting List Confirmation Email *Inactive*	This email is sent to the candidate when they place themselves on the waiting list via the Candidate View.
User-Defined Email #1 *Inactive*	This email is sent to the candidate when the status of their interview is changed to a custom status that is linked to the email.
User-Defined Email #2 *Inactive*	This email is sent to the candidate when the status of their interview is changed to a custom status that is linked to the email.
User-Defined Email #3 *Inactive*	This email is sent to the candidate when the status of their interview is changed to a custom status that is linked to the email.
User-Defined Email #4 *Inactive*	This email is sent to the candidate when the status of their interview is changed to a custom status that is linked to the email.
User-Defined Email #5 *Inactive*	This email is sent to the candidate when the status of their interview is changed to a custom status that is linked to the email.

1. Click Settings on the upper right, then click Notifications on the lower left.
2. The top link are the templates for the Candidates. The bottom half can go out to the interview schedule.
3. Click each link to update the email templates you would like to use.

Schedule Email Templates



User-Defined Email #3 *Inactive*	This email is sent to the candidate when the status of their interview is changed to a custom status that is linked to the email.
User-Defined Email #4 *Inactive*	This email is sent to the candidate when the status of their interview is changed to a custom status that is linked to the email.
User-Defined Email #5 *Inactive*	This email is sent to the candidate when the status of their interview is changed to a custom status that is linked to the email.
User-Defined Email #6 *Inactive*	This email is sent to the candidate when the status of their interview is changed to a custom status that is linked to the email.
User-Defined Email #7 *Inactive*	This email is sent to the candidate when the status of their interview is changed to a custom status that is linked to the email.
User-Defined Email #8 *Inactive*	This email is sent to the candidate when the status of their interview is changed to a custom status that is linked to the email.
User-Defined Email #9 *Inactive*	This email is sent to the candidate when the status of their interview is changed to a custom status that is linked to the email.
User-Defined Email #10 *Inactive*	This email is sent to the candidate when the status of their interview is changed to a custom status that is linked to the email.

Schedule Notifications

Name	Description
Cancellation Notification Email *Active*	This email is sent to the schedule associated with the interview and/or to a specified email address when interviews are cancelled via Site Administration or via the Candidate View.
Change Notification Email *Inactive*	This email is sent to the schedule associated with the interview and/or to a specified email address when interviews are changed via Site Administration.
Interview Notification Email *Inactive*	This email is sent to the schedule associated with the interview and/or to a specified email address when interviews are made via Site Administration or via the Candidate View.
No-Show Notification Email *Active*	This email is sent to the schedule associated with the interview and/or to a specified email address when the status of an interview is changed to "no show"
Registration Notification Email *Inactive*	This email is sent to a specified email address when candidates register via the Candidate View.
Waiting List Notification Email *Inactive*	This email is sent to a specified email address when candidates add themselves to the waiting list via the Candidate View.

1. Click Settings on the upper right, then click Notifications on the lower left.
2. The top link are the templates for the Candidates. The bottom half can go out to the interview schedule.
3. Click each link to update the email templates you would like to use.

Emails to Candidate and Link to Cancel or Reschedule

Jessica,

Thank you for making an interview with us. You are confirmed for the following interview/interviews on:

Date
Thursday, May 14, 2020

Time
11:00am

Schedule
Interview Schedule5 (location)
directions/ information

Interview Type
Interview

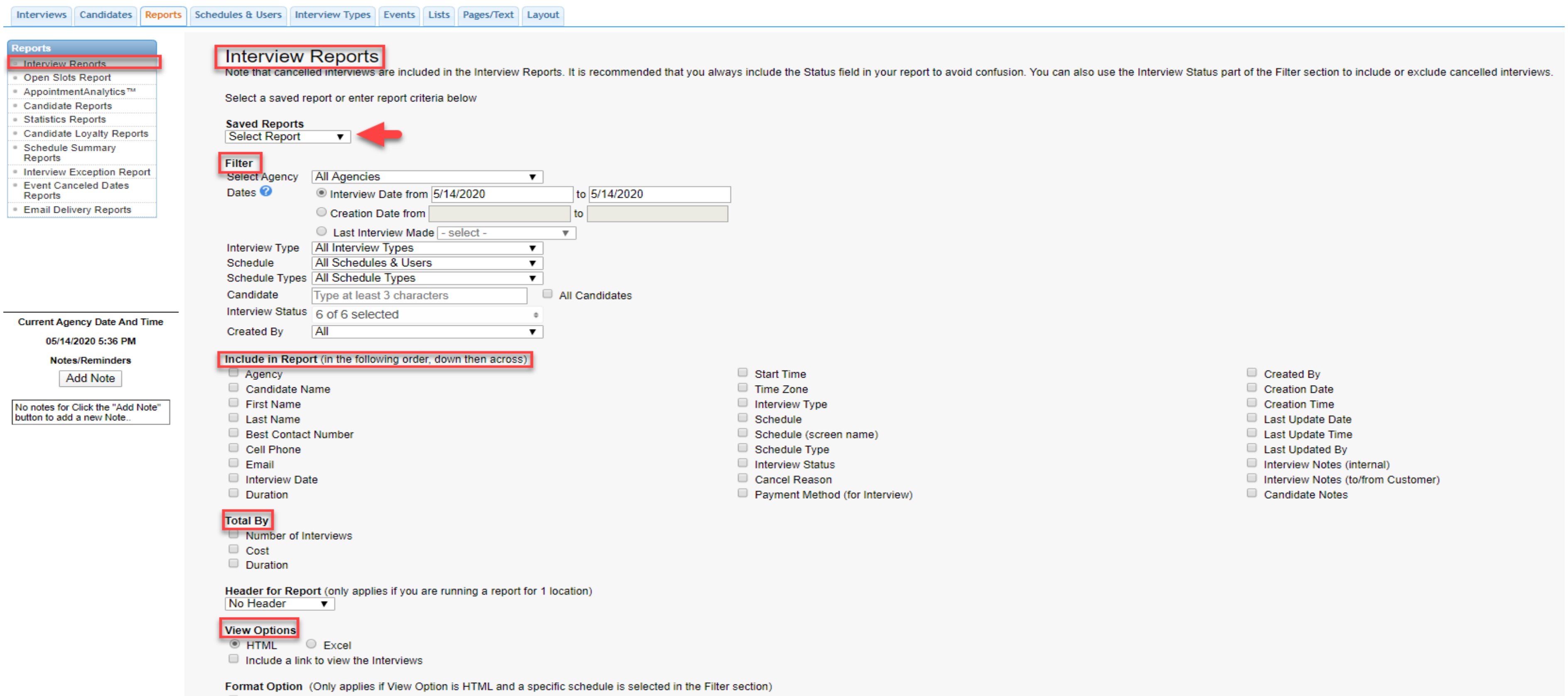
If you need to cancel or reschedule your interview, you may do so through our Web site or give us a call.Please click this link to cancel or reschedule your interview.

Thanks!
State of Wisconsin HR

State of Wisconsin Enterprise HR
4822 Madison Yards Way

1. Sample Confirmation Email.
2. Candidate can click the link to cancel or reschedule their interview.

Reports



1. Click the Reports tab at the top.
2. For Interview Reports, select your Agency (or all for HQ Admins), filters for your report and run report.
3. You can name a report and click Save and Run Report to create a report template.

Reports Overview

https://apptplus.zendesk.com/hc/en-us/articles/215144203-Reports-Overview

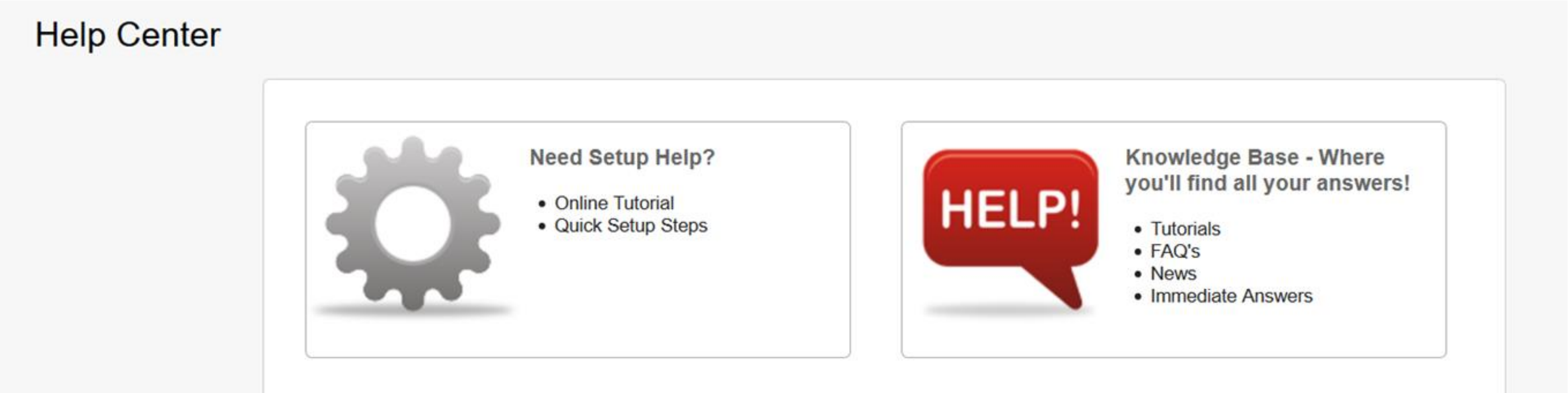
Preferences Overview

In AppointmentPlus we have hundreds of Preferences. Please contact us directly if you have any specific questions.

Please note that Preferences are currently being shared across all Agencies.

Help Resources

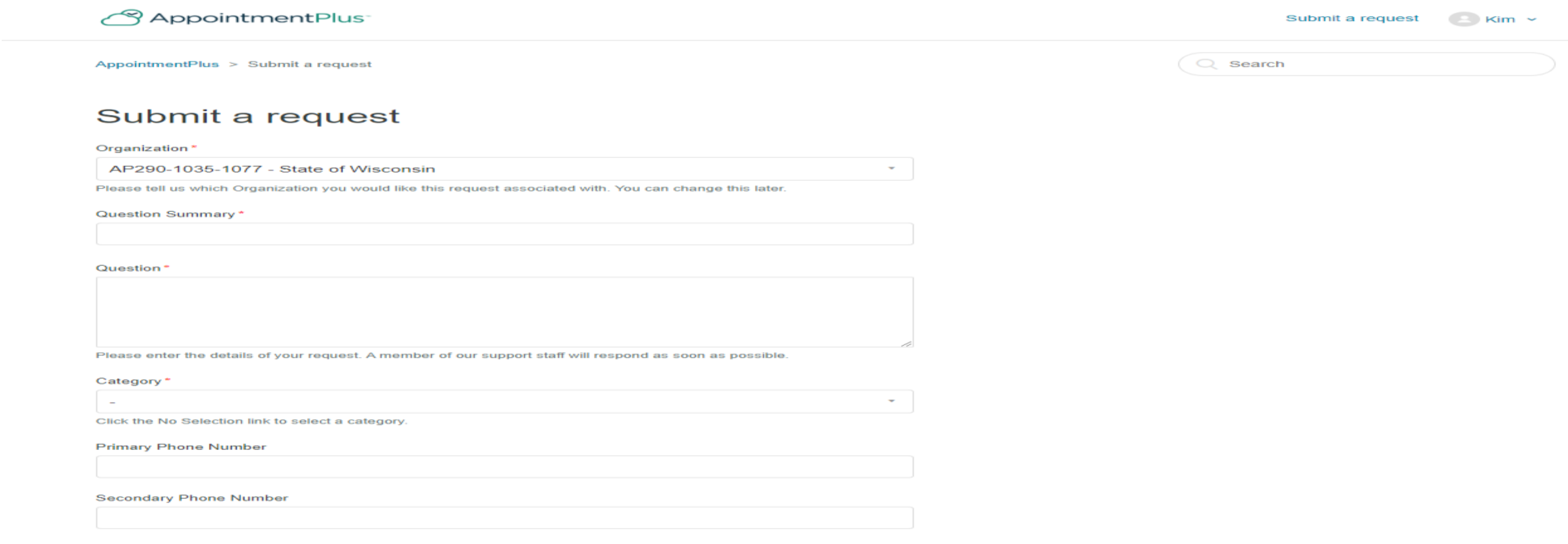
You can hover over the Help option in the top right corner



Here you can view our knowledge base.
For Additional Help Articles, FAQ’s and Tutorial Videos

Submit a Ticket

You can hover over the Help option in the top right corner. Then click Support Tickets



Click Submit a Request, fill out the form, and submit at the bottom.

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