



Site Administration User Guide



presented by:



How to login to AppointmentPlus



Username

Password

Remember me

[Forgot password?](#)

Sign In

- 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

The screenshot displays the AppointmentPlus software interface. At the top left is the AppointmentPlus logo. The top navigation bar includes tabs for Interviews, Candidates, Reports, Schedules & Users, Interview Types, Events, Lists, Pages/Text, and Layout. A 'Previous Login' indicator shows 'May 14, 2020 - 4:20'. A search box at the top right is labeled 'Search: Search Agency name' and contains a dropdown menu with 'DMA', 'DOJ', and 'OSPD' options. A red arrow points to the 'Agency' label next to the search box. Below the navigation bar, the main content area shows a calendar view for 'Thursday, May 14, 2020' with a 'Current Time' of 'May 14, 2020 - 5:32 PM CDT'. The calendar displays a schedule for 'Interview Schedule5 (location)' with slots from 8:00 am to 12:00 pm. Slots at 9:00 am, 10:00 am, and 11:00 am are highlighted in yellow and show '1/1' and the name of the interviewee: 'Jessica Watts' at 9:00 am and 11:00 am, and 'Test Customer' at 10:00 am. On the left side, there are sections for 'View Schedule For:' (with dropdowns for 'Interview Schedule5 (locati)' and 'All Schedule Types'), 'Search for Interviews' (with a 'Search by' field and a 'Go' button), and a date selector for 'May 2020'.

1. Select the Agency at the top right.

How to Set Your Agency Open Hours & Closed Days

The screenshot shows the AppointmentPlus settings interface. At the top, there are navigation tabs: Interviews, Candidates, Reports, Schedules & Users, Interview Types, Events, Lists, Pages/Text, and Layout. A red arrow points to a 'Settings' button in the top right corner. On the left, a 'Settings' sidebar is visible with a red box around 'Open Hours' and a red arrow pointing to it. Below 'Open Hours' is 'Closed Days', also with a red arrow pointing to it. The main content area is titled 'Open Hours' and contains a table with the following structure:

| Day | Open? | Open Time | to | Close Time |
|-----------------------------|---|------------------|----|-------------------|
| Are you open on Mondays? | <input checked="" type="radio"/> Yes <input type="radio"/> No | 8:00am | | 5:00pm |
| Are you open on Tuesdays? | <input checked="" type="radio"/> Yes <input type="radio"/> No | 8:00am | | 5:00pm |
| Are you open on Wednesdays? | <input checked="" type="radio"/> Yes <input type="radio"/> No | 8:00am | | 5:00pm |
| Are you open on Thursdays? | <input checked="" type="radio"/> Yes <input type="radio"/> No | 8:00am | | 5:00pm |
| Are you open on Fridays? | <input checked="" type="radio"/> Yes <input type="radio"/> No | 8:00am | | 5:00pm |
| Are you open on Saturdays? | <input type="radio"/> Yes <input checked="" type="radio"/> No | Select Open Time | | Select Close Time |
| Are you open on Sundays? | <input type="radio"/> Yes <input checked="" type="radio"/> No | Select Open Time | | Select Close Time |

Below the table are two checkboxes:

- Apply changes to schedule open hours. This will result in schedule hours being exactly the same as company hours. Uncheck this when updating if schedule hours can be different from company hours.
- We have a 24 hour operation. Selecting this ensures that interviews can span from one day to the next (only applies to Site Administration). Even if you select this, you still need to select your open and closed days and times.

A red arrow points to an 'Update' button at the bottom right of the settings area.

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.

How to Add an Interview Type

The screenshot shows the 'Add New Interview Type' form in the AppointmentPlus software. The 'Interview Types' tab is selected in the top navigation bar. In the left sidebar, the 'Add New Interview Type' option is highlighted with a red box and a red arrow. The form fields are as follows:

| | |
|------------------------|---|
| Title | Phone Interview |
| Description | |
| Internal Description | |
| Allow Candidate to See | <input checked="" type="radio"/> yes <input type="radio"/> no |
| Duration | 30 minutes <small>Note that add-on services may or may not have a duration.</small> |
| Number of Spots | 1 <small>This is NOT the allowable number of interviews in a time slot. Rather this is how many spots are taken up if one interview is made for this interview type</small> |
| Type | <input checked="" type="radio"/> interview type <input type="radio"/> add-on service |
| Cost | |

At the bottom right of the form, there is an 'Add' button. On the left side of the form, there is a section for 'Current Agency Date And Time' (05/18/2020 3:55 PM) and 'Notes/Reminders' with an 'Add Note' button. A note at the bottom left states: 'No notes for Click the "Add Note" button to add a new Note'.

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

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

Schedules & Users

- Schedules & Users
- Add New Schedule**
- Schedule Templates

General Information

| | |
|---|---|
| First Name | <input type="text"/> |
| Middle Name | <input type="text"/> |
| Last Name | <input type="text"/> |
| Screen Name  | <input type="text" value="New Admin User"/> |
| Company (if applicable) | <input type="text"/> |
| Address | <input type="text"/> |
| City | <input type="text"/> |
| State/Province | <input type="text"/> |
| Zip/Postal Code | <input type="text"/> |
| E-mail Address | <input type="text" value="email"/> |

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

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

Schedules & Users

- Schedules & Users
- Add New Schedule
- Schedule Templates

Profile Information

Status Active Inactive
Note that inactive schedules & users can still log in, but don't display as being available for interviews.

Allow Customers to See yes no

Access Type Location Administrator
 Headquarters Administrator
 Call Center User
 Location User
 View Interviews Only User

Add Schedule to all Agencies Assign this Schedule to all available Agencies

Customer View Menu

| | |
|---------------------------------------|--|
| Customer View - Facebook Link | <input checked="" type="radio"/> Show <input type="radio"/> Hide |
| Customer View - Twitter Link | <input checked="" type="radio"/> Show <input type="radio"/> Hide |
| Customer View - Email Link | <input checked="" type="radio"/> Show <input type="radio"/> Hide |
| Customer View - Book Now Buttons Link | <input checked="" type="radio"/> Show <input type="radio"/> Hide |
| Customer View - Preview Link | <input checked="" type="radio"/> Show <input type="radio"/> Hide |

Marketplace Link Show Hide

Help Menu Show Hide

| | |
|----------------------------|--|
| Help Menu - Knowledge Base | <input checked="" type="radio"/> Show <input type="radio"/> Hide |
| Help Menu - Setup Help | <input checked="" type="radio"/> Show <input type="radio"/> Hide |
| Help Menu - Contact Us | <input checked="" type="radio"/> Show <input type="radio"/> Hide |

Top Menu Access

Schedule Type

Login

Password

Confirm Password

[Login Rules](#)

[Strong Password Rules](#)

This is a temporary password and requires a change upon login

Current Agency Date And Time
05/13/2020 9:09 AM

Notes/Reminders

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

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

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

Schedules & Users

- Schedules & Users
- Add New Schedule
- Schedule Templates

10 results found Print

| Name | Access Type | Display on Customer View | Sort Order | Delete User |
|--|----------------------------|--------------------------|--------------------------------|---|
| Rahal, Kim (Kim) <i>Inactive</i> kim.rahal@wisconsin.gov | Headquarters Administrator | No | <input type="text" value="0"/> |  |
| Interview Schedule5 (location) <i>Active</i> email (2) | Location User | Yes | <input type="text" value="0"/> |  |
| Interview/ Position Schedule (location) <i>Active</i> email (s) email 2 | Location User | Yes | <input type="text" value="0"/> |  |

Current Agency Date And Time
05/14/2020 8:32 AM

Notes/Reminders

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

The screenshot shows the AppointmentPlus web application interface. The top navigation bar includes the AppointmentPlus logo, a menu with 'Interviews', 'Candidates', 'Reports', 'Schedules & Users', 'Interview Types', 'Events', 'Lists', 'Pages/Text', and 'Layout', and a 'Settings' button. The 'Schedules & Users' menu is active, and a user profile is selected. The user's name is 'State of Wisconsin Enterprise HR'. The profile information is displayed in a table with various links and options. The 'Login' and 'Password' fields are highlighted with a red box, and a red arrow points to the 'New Login/Password' and 'Send Reset Email' buttons. The 'Update' button is located at the bottom of the form.

Account Search | Site Administration | Redirecting... | AppointmentPlus | +

account.appointment-plus.com/ap/ap_admin_v2/appointments_index_v2.php?p=appts&first=yes

Apps | Getting Started | Imported | Other Bookmarks | SMS Bank Update | SMS Tracking - Clie... | New Tab | Newsletter Tips and...

Previous Login: May 15, 2020 - 8:00 AM CDT | The Marketplace | Candidate View | Dashboard | Help | Sign Out |

Agency: State of Wisconsin Enterprise HR

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

User Name

- Profile Information
- Agencies
- Schedule
 - State of Wisconsin Enterprise HR
- Schedule Exceptions
 - State of Wisconsin Enterprise HR
- Interview Types Offered
 - State of Wisconsin Enterprise HR
- Days Off
 - State of Wisconsin Enterprise HR

Current Agency Date And Time

05/16/2020 12:36 PM

Notes/Reminders

Add Note

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

| | |
|---------------------------------------|--|
| Customer View - Twitter Link | <input checked="" type="radio"/> Show <input type="radio"/> Hide |
| Customer View - Email Link | <input checked="" type="radio"/> Show <input type="radio"/> Hide |
| Customer View - Book Now Buttons Link | <input checked="" type="radio"/> Show <input type="radio"/> Hide |
| Customer View - Preview Link | <input checked="" type="radio"/> Show <input type="radio"/> Hide |
| Marketplace Link | <input checked="" type="radio"/> Show <input type="radio"/> Hide |
| Help Menu | <input checked="" type="radio"/> Show <input type="radio"/> Hide |
| Help Menu - Support Tickets | <input checked="" type="radio"/> Show <input type="radio"/> Hide |
| Help Menu - Knowledge Base | <input checked="" type="radio"/> Show <input type="radio"/> Hide |
| Help Menu - Setup Help | <input checked="" type="radio"/> Show <input type="radio"/> Hide |
| Help Menu - Contact Us | <input checked="" type="radio"/> Show <input type="radio"/> Hide |

Top Menu Access

Schedule Type

Login email [Login Rules](#)

Password *****

Change Login/Password

Profile

Notes

Update

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

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



Schedules & Users

- Schedules & Users
- Add New Schedule**
- Schedule Templates

General Information

| | |
|---|-----------------------------|
| First Name | <input type="text"/> |
| Middle Name | <input type="text"/> |
| Last Name | <input type="text"/> |
| Screen Name  | Interview Schedule (locatic |
| Company (if applicable) | <input type="text"/> |
| Address | <input type="text"/> |
| City | <input type="text"/> |
| State/Province | <input type="text"/> |
| Zip/Postal Code | <input type="text"/> |
| E-mail Address | email (s) |

Current Agency Date And Time



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

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

Schedules & Users

- Schedules & Users
- Add New Schedule
- Schedule Templates

Current Agency Date And Time
05/11/2020 8:06 AM

Notes/Reminders
Add Note

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

Profile Information

Status Active Inactive
Note that inactive schedules & users can still log in, but don't display as being available for interviews.

Allow Customers to See yes no

Access Type Headquarters Administrator
 Call Center User
 Location Administrator
 Location User
 View Interviews Only User

Add Schedule to all Agencies Assign this Schedule to all available Agencies

Customer View Menu Show Hide

Customer View - Facebook Link Show Hide

Customer View - Twitter Link Show Hide

Customer View - Email Link Show Hide

Customer View - Book Now Buttons Link Show Hide

Customer View - Preview Link Show Hide

Marketplace Link Show Hide

Help Menu Show Hide

Help Menu - Knowledge Base Show Hide

Help Menu - Setup Help Show Hide

Help Menu - Contact Us Show Hide

Top Menu Access

Schedule Type

Login

Password

Confirm Password This is a temporary password and requires a change upon login

Profile

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

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

Interview Schedule (location)

- Profile Information
- Agencies
- Schedule
 - State of Wisconsin
 - Enterprise HR
- Schedule Exceptions**
 - State of Wisconsin
 - Enterprise HR
- Interview Types Offered
 - State of Wisconsin
 - Enterprise HR
- Days Off
 - State of Wisconsin
 - Enterprise HR

Exception Schedule Dates

Interview Schedule (location)

Exception schedules override any existing schedules set up for schedules & users for a particular date. If the schedule is not normally available on a particular date, an exception schedule can allow them to be available for that date.

There are two ways to create your time slots. You can automatically create them via the Quick Time Slot Creator or you can create your slots individually using the Manual Time Slot Creator. Here is the difference:

Quick Time Slot Creator
Individual time slots are automatically created based on the criteria you select for the slots. You also select the daily slot time ranges.

Manual Time Slot Creator
You can manually create your time slots and the number of interviews you accept per time slot.

Quick Time Slot Creator

Every 45 minutes
Slot Duration 30 minutes Make large enough to accommodate durations of your interview types.
Interviews Per Slot 1
Date Tuesday, May 12, 2020
From/To Time 08:00 am 05:00 pm

Create Slots

Delete All Slots

Current Agency Date And Time
05/11/2020 8:26 AM

Notes/Reminders
Add Note

No notes for Click the "Add Note"

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

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

Interview Schedule (location)

- Profile Information
- Agencies
- Schedule
 - State of Wisconsin Enterprise HR
- Schedule Exceptions**
 - State of Wisconsin Enterprise HR
- Interview Types Offered
 - State of Wisconsin Enterprise HR
- Days Off
 - State of Wisconsin Enterprise HR

Quick Time Slot Creator

Every 45 minutes
Slot Duration 30 minutes *Make large enough to accommodate durations of your interview types.*
Interviews Per Slot 1
Date Tuesday, May 12, 2020
From/To Time 08:00 am 05:00 pm

Create Slots

Manual Time Slot Creator

Update All Slots

| Date | Start Time | End Time | Max Appts | Delete |
|-----------------------|------------|----------|-----------|-------------------------------------|
| Tuesday, May 12, 2020 | 8:00am | 8:30am | 1 | <input type="checkbox"/> |
| Tuesday, May 12, 2020 | 8:45am | 9:15am | 1 | <input type="checkbox"/> |
| Tuesday, May 12, 2020 | 9:30am | 10:00am | 1 | <input type="checkbox"/> |
| Tuesday, May 12, 2020 | 10:15am | 10:45am | 1 | <input type="checkbox"/> |
| Tuesday, May 12, 2020 | 11:00am | 11:30am | 1 | <input type="checkbox"/> |
| Tuesday, May 12, 2020 | 11:45am | 12:15pm | 1 | <input type="checkbox"/> |
| Tuesday, May 12, 2020 | 12:30pm | 1:00pm | 1 | <input checked="" type="checkbox"/> |
| Tuesday, May 12, 2020 | 1:15pm | 1:45pm | 1 | <input type="checkbox"/> |
| Tuesday, May 12, 2020 | 2:00pm | 2:30pm | 1 | <input type="checkbox"/> |
| Tuesday, May 12, 2020 | 2:45pm | 3:15pm | 1 | <input type="checkbox"/> |
| Tuesday, May 12, 2020 | 3:30pm | 4:00pm | 1 | <input type="checkbox"/> |
| Tuesday, May 12, 2020 | 4:15pm | 4:45pm | 1 | <input type="checkbox"/> |

Select Date Select Start Time Select End Time 1 Add

Current Agency Date And Time 05/11/2020 8:33 AM

Notes/Reminders Add Note

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

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

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

Interview Schedule5 (location)

- Profile Information
- Agencies
- Schedule
 - State of Wisconsin Enterprise HR
- Schedule Exceptions
 - State of Wisconsin Enterprise HR
- Interview Types Offered**
 - State of Wisconsin Enterprise HR
- Days Off
 - State of Wisconsin Enterprise HR

Interview Types Offered

Interview Schedule5 (location)
State of Wisconsin Enterprise HR

To assign a interview type to a schedule, click on the checkbox under "Interview Type Offered?". Also, click on the days the interview type is offered for this schedule. The default "Time to Complete" and the default "Cost" can be overridden for this schedule by changing the values in those fields.

[Select All](#) [Deselect All](#)


| Interview Type Offered? | Interview Type Description | Time To Complete | Days Offered | Cost |
|-------------------------------------|--|------------------|--|------|
| <input checked="" type="checkbox"/> | Interview <i>interview type</i> | 30 minutes | <input checked="" type="checkbox"/> Mon <input checked="" type="checkbox"/> Tue <input checked="" type="checkbox"/> Wed <input checked="" type="checkbox"/> Thu <input checked="" type="checkbox"/> Fri <input checked="" type="checkbox"/> Sat <input checked="" type="checkbox"/> Sun | 0.00 |
| <input type="checkbox"/> | Phone Interview <i>interview type</i> | 30 minutes | <input type="checkbox"/> Mon <input type="checkbox"/> Tue <input type="checkbox"/> Wed <input type="checkbox"/> Thu <input type="checkbox"/> Fri <input type="checkbox"/> Sat <input type="checkbox"/> Sun | |

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



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

View Schedule For:  Interview Schedule (location) All Schedule Types

Search for Interviews

Search by











Go


May 2020

Su Mo Tu We Th Fr Sa

Tuesday, May 12, 2020 Current Time: May 11

Interview Schedule (location)

| | | | |
|----------|----------------|---|-------|
| 8:00 am | 8:00amReserved |  | 0 / 1 |
| 8:45 am | |  | 0 / 1 |
| 9:30 am | |  | 0 / 1 |
| 10:15 am | |  | 0 / 1 |
| 11:00 am | |  | 0 / 1 |
| 11:45 am | |  | 0 / 1 |
| 12:30 pm | |  | 0 / 1 |
| 1:15 pm | |  | 0 / 1 |
| 2:00 pm | |  | 0 / 1 |
| 2:45 pm | |  | 0 / 1 |



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

How to Book an Interview On Your Calendar

The screenshot shows the AppointmentPlus software interface. At the top, there are navigation tabs: Interviews, Candidates, Reports, Schedules & Users, Interview Types, Events, Lists, Pages/Text, and Layout. The 'Interviews' tab is selected. Below the tabs, there is a 'View Schedule For:' dropdown menu with 'Interview/ Position Schedul' selected. Below that is a search bar for interviews. The main area shows a calendar for Tuesday, May 12, 2020. The current time is May 13, 2020 - 8:20. The calendar grid shows a reserved slot at 8:00 am and available slots from 9:00 am to 4:00 pm. A red box highlights the '10:00 am' slot, and a red arrow points to it.

| Time | Availability |
|----------|----------------|
| 8:00 am | 8:00amReserved |
| 9:00 am | + 0 / 1 |
| 10:00 am | + 0 / 1 |
| 11:00 am | + 0 / 1 |
| 1:00 pm | + 0 / 1 |
| 2:00 pm | + 0 / 1 |
| 3:00 pm | + 0 / 1 |
| 4:00 pm | + 0 / 1 |

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

Create Interview | Create Reserve Time


Candidate | Interview | Finalize

Jessica Watts
(111) 111-1111
jwatts@appointmentplus.com

Candidate Information


Candidate Search 


First Name * [view](#)


Last Name * 

Best Contact Number *

Cell Phone

Email * 

 **Candidate Notes (internal only)**

 **Next >**

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

How to Book an Interview On Your Calendar

Create Interview

Create Reserve Time


 Candidate

 Interview

 Finalize

Jessica Watts
(111) 111-1111
jwatts@appointmentplus.com

Interview Information

Date May 12, 2020  **Agency** State of Wiscons **Status** Scheduled

Interview Type Interview **Schedule** Interview/ Position **Time** 10:00am **Duration** 1 hour

Special Instructions to/from Candidate

Interview Notes (internal only)

< Back

Next >

1. Verify the Interview Duration, click next.

How to Book an Interview On Your Calendar

[Create Interview](#) [Create Reserve Time](#)

Candidate Interview Finalize

Jessica Watts
(111) 111-1111
jwatts@appointmentplus.com

Finalize Interview

Candidate
Jessica Watts

Agency
State of Wisconsin Enterprise HR

Status
Scheduled

Created By
Kim

Tuesday, May 12, 2020
10:00am - 11:00am

May 12

| Interview Type | Schedule |
|----------------|---|
| Interview | Interview/ Position Schedule (location) |

Send interview email to candidate

[< Back](#) [Finalize Interview](#)

1. Verify the Information and click Finalize Appointment.

How to Cancel or Edit an Interview

The screenshot displays the AppointmentPlus software interface. At the top, there is a navigation bar with tabs for Interviews, Candidates, Reports, Schedules & Users, Interview Types, Events, Lists, Pages/Text, and Layout. The main area shows a calendar view for Tuesday, May 12, 2020, with a current time of 8:44 AM on May 13, 2020. A pop-up window for an interview scheduled for 10:00 am on 5/12/2020 is open, showing options to 'Edit Interview' and 'Cancel'.

View Schedule For:
Interview/ Position Schedul ▾
All Schedule Types ▾

Search for Interviews
Search by
Go

May 2020
Su Mo Tu We Th Fr Sa

Interview/ Position Schedule (location)

| | |
|----------|--|
| 8:00 am | 8:00am Reserved |
| 9:00 am | + 0 / 1 |
| 10:00 am | 1 / 1 5/12/2020 10:00am - 11:00am Jessica Watts |
| 11:00 am | + 0 / 1 |
| 1:00 pm | + 0 / 1 |
| 2:00 pm | + 0 / 1 |
| 3:00 pm | + 0 / 1 |
| 4:00 pm | + 0 / 1 |

5/12/2020 10:00am - 11:00am | Jessica Watts

Scheduled ▾ | Edit Interview

Best Contact Number (111) 111-1111

Last 3 Interviews

| Date | Interview Type | Status |
|-------------------|----------------|-----------|
| 5/11/2020 10:00am | Interview | Complete |
| 5/11/2020 8:00am | Interview | Cancelled |

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

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/b95csixm/?&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)

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

Schedules & Users
Schedules & Users
Add New Schedule
Schedule Templates

Search

10 results found

Print

| Name | Access Type | Display on Customer View | Sort Order | Delete User |
|---|----------------------------|--------------------------|--------------------------------|-------------|
| Rahal, Kim (Kim) <i>Inactive</i> kim.rahal@wisconsin.gov | Headquarters Administrator | No | <input type="text" value="0"/> | |
| Interview Schedule5 (location) <i>Active</i> email (2) | Location User | Yes | <input type="text" value="0"/> | |

Current Agency Date And Time

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

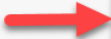
How to Get the 4-Digit Schedule Code

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

Schedules & Users

- Schedules & Users
- Add New Schedule
- Schedule Templates

10 results found Print

| Name | Access Type | Display on Customer View | Sort Order | Delete User |
|--|----------------------------|--------------------------|--------------------------------|-------------|
| Rahal, Kim (Kim) <i>Inactive</i> kim.rahal@wisconsin.gov | Headquarters Administrator | No | <input type="text" value="0"/> | |
|  Interview Schedule5 (location) <i>Active</i> email (2) | Location User | Yes | <input type="text" value="0"/> | |
| Interview/ Position Schedule (location) <i>Active</i> email (s) email 2 | Location User | Yes | <input type="text" value="0"/> | |

Current Agency Date And Time
05/14/2020 8:26 AM

Notes/Reminders

https://account.appointment-plus.com/ap/ap_admin_v2/sidenav_frame_v2.php?employee_id=5579&xp=staff_details&sec=1&first=yes

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

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

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

Lists

- Agencies
- Heard Via? Types
- Payment Types
- Interview Status Types**
- Customer Types
- Candidate Status Types
- Schedule Types
- Event Cancellation Reasons

Interview Status Types

| Description | Sort Order |
|--|--------------------------------|
| Scheduled (Scheduled Notification) | <input type="text" value="1"/> |
| Confirmed (Confirmed Notification) | <input type="text" value="2"/> |
| Complete (Complete Notification) | <input type="text" value="3"/> |
| No Show (No Show Notification) | <input type="text" value="6"/> |

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

Candidate Email Templates

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

Interviews
Candidates
Schedules & Users
Interview Types
Events
Terms
Agencies
Candidate View
Waiting List
Emails
Packages
Calendar Export
Candidate Payments
Candidate Fields/Terms
General
Mobile
Notifications
Work Requests

| Name | Description |
|--|---|
| Gift Certificate Recipient E-mail <i>Inactive</i> | 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 <i>Active</i> | This email is sent to the candidate when interviews are cancelled via Site Administration or via the Candidate View. |
| Interview Change Email <i>Active</i> | 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 <i>Inactive</i> | This email is sent to the candidate when the status of their interview is changed to "complete" |
| Interview Confirmation Email <i>Active</i> | This email is sent to the candidate when interviews are made via Site Administration or via the Candidate View. |
| Interview Confirmed Email <i>Inactive</i> | This email is sent to the candidate when the status of their interview is changed to "confirmed" |
| Interview No Show Email <i>Inactive</i> | This email is sent to the candidate when the status of their interview is changed to "no show" |
| Interview Reminder Email <i>Active</i> | This email is sent to the candidate a specified number of days before the interview |
| Registration Confirmation Email <i>Inactive</i> | 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 <i>Email</i> <i>Inactive</i> | This email is sent to candidates who have not made interviews in a specified number of days |
| Waiting List Confirmation Email <i>Inactive</i> | This email is sent to the candidate when they place themselves on the waiting list via the Candidate View. |
| User-Defined Email #1 <i>Inactive</i> | 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 <i>Inactive</i> | 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 <i>Inactive</i> | 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 <i>Inactive</i> | 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 <i>Inactive</i> | 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. |

Current Agency Date And Time
05/15/2020 12:47 PM

Notes/Reminders

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

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

Settings

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

- Interviews
- Candidates
- Schedules & Users
- Interview Types
- Events
- Terms
- Agencies
- Candidate View
- Waiting List
- Emails
- Packages
- Calendar Export
- Candidate Payments
- Candidate Fields/Terms
- General
- Mobile
- Notifications
- Work Requests

| | |
|---|---|
| User-Defined Email #3 <i>Inactive</i> | 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 <i>Inactive</i> | 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 <i>Inactive</i> | 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 <i>Inactive</i> | 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 <i>Inactive</i> | 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 <i>Inactive</i> | 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 <i>Inactive</i> | 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 <i>Inactive</i> | 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. |

Current Agency Date And Time
05/15/2020 12:49 PM

Notes/Reminders

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

Schedule Notifications

| Name | Description |
|--|---|
| Cancellation Notification Email <i>Active</i> | 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 <i>Inactive</i> | 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 <i>Inactive</i> | 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 <i>Active</i> | 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 <i>Inactive</i> | This email is sent to a specified email address when candidates register via the Candidate View. |
| Waiting List Notification Email <i>Inactive</i> | 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](#)
[Madison, WI 53707-2015](#)

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

Reports

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

Reports

- Interview Reports
- Open Slots Report
- AppointmentAnalytics™
- Candidate Reports
- Statistics Reports
- Candidate Loyalty Reports
- Schedule Summary Reports
- Interview Exception Report
- Event Canceled Dates Reports
- Email Delivery Reports

Current Agency Date And Time
05/14/2020 5:36 PM

Notes/Reminders
[Add Note](#)

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

Interview Reports

Note that cancelled interviews are included in the Interview Reports. It is recommended that you always include the Status field in your report to avoid confusion. You can also use the Interview Status part of the Filter section to include or exclude cancelled interviews.

Select a saved report or enter report criteria below

Saved Reports
Select Report

Filter

Select Agency: All Agencies

Dates: Interview Date from 5/14/2020 to 5/14/2020
Creation Date from to
Last Interview Made - select -

Interview Type: All Interview Types
Schedule: All Schedules & Users
Schedule Types: All Schedule Types
Candidate: Type at least 3 characters All Candidates
Interview Status: 6 of 6 selected
Created By: All

Include in Report (in the following order, down then across)

- Agency
- Candidate Name
- First Name
- Last Name
- Best Contact Number
- Cell Phone
- Email
- Interview Date
- Duration
- Start Time
- Time Zone
- Interview Type
- Schedule
- Schedule (screen name)
- Schedule Type
- Interview Status
- Cancel Reason
- Payment Method (for Interview)
- Created By
- Creation Date
- Last Update Date
- Last Update Time
- Last Updated By
- Interview Notes (internal)
- Interview Notes (to/from Customer)
- Candidate Notes

Total By

- Number of Interviews
- Cost
- Duration

Header for Report (only applies if you are running a report for 1 location)
No Header

View Options

- HTML Excel
- Include a link to view the interviews

Format Option (Only applies if View Option is HTML and a specific schedule is selected in the Filter section)
 Show non time slots

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

Help Center



Need Setup Help?

- Online Tutorial
- Quick Setup Steps



Knowledge Base - Where you'll find all your answers!

- Tutorials
- FAQ's
- News
- Immediate Answers

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

Submit a request

Organization *
AP290-1035-1077 - State of Wisconsin

Please tell us which Organization you would like this request associated with. You can change this later.

Question Summary *

Question *

Please enter the details of your request. A member of our support staff will respond as soon as possible.

Category *

Click the No Selection link to select a category.

Primary Phone Number

Secondary Phone Number

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

