

User Manual

Appointment scheduler (web app), for front-desk staff and practice managers, covering version 3.2

Filled-in example. The product is a generic appointment scheduling web app; its screens, settings, limits and dates are invented to show the level of detail each section needs.

Product	Appointment scheduler (web app)	Product version	3.2
Manual version	2.0	Last updated	2026-10-20
Written for	Front-desk staff and practice managers	Manual owner	Support lead
Status	Published	Next review	The next product release

1. About this manual

This manual shows front-desk staff how to book, move and cancel appointments, and shows practice managers how to set opening hours and reminders.

- **Who it is for:** anyone who books appointments for clients, and the managers who set up the calendar.
- **What it covers:** version 3.2 of the web app in a desktop browser.
- **What it does not cover:** billing and invoices, which have their own manual, and the booking page clients use themselves.
- **Conventions:** bold text is a button, menu or field name exactly as it appears on screen. The You should see column tells you what the screen shows when a step worked.

2. Before you start

Requirement	Details
Browser	A current version of Chrome, Edge, Firefox or Safari on a computer. Phones can view the calendar but cannot change settings.
Account	An invitation email from your practice manager. You sign in with your work email address.
Role	Staff can book, move and cancel appointments. Only a Manager can change opening hours, services and reminders.
Ready to hand	The client's name, their phone number or email, and the service they want.

3. Getting started

3.1 Sign in for the first time

Step	Do this	You should see
1	Open the invitation email and click Accept invitation .	A page asks you to choose a password.
2	Type a password twice and click Create account .	The calendar opens on today's date.

Step	Do this	You should see
3	Click your initials in the top right corner, then Profile , and check your name and time zone.	The time zone matches the location you work at.

3.2 The main screen

Area	What it is for
Left menu	Calendar, Clients and Services, plus Settings for managers.
Calendar	One column per staff member and one row per time slot. A booked slot shows the client's name.
New appointment	The button in the top right corner. It opens the booking form for the day you are looking at.
Search	Finds a client by name, phone number or email.

4. Tasks

4.1 Book an appointment

- **Goal:** the appointment is on the calendar and the client has a confirmation email.
- **Before you start:** the client's details and the service they want.
- **Screenshot or video:** a short video of these steps is in the help center under Book an appointment.

Step	Do this	You should see
1	Click New appointment .	The booking form opens.
2	Type the client's name in Client and pick them from the list. For a new client, click Add new client and enter their name, phone number and email.	The client's phone number and email appear under the field.
3	Choose the Service .	The appointment length fills in by itself.
4	Choose the Staff member , then click a free time slot.	The slot turns blue. Gray slots are not available and cannot be picked.
5	Add anything the staff member should know in Notes .	Notes are visible to staff only, never to the client.
6	Click Book .	The form closes and the appointment appears on the calendar.

4.2 Move an appointment to another time

Step	Do this	You should see
1	Click the appointment on the calendar.	The appointment panel opens on the right.
2	Click Reschedule .	Free slots for the same service and staff member are shown.
3	Pick the new slot and click Confirm .	The appointment moves, and the client is emailed the new time.

The full manual continues with one subsection per task: cancel an appointment, record a no-show and look up a client's history.

5. Settings and administration

Setting	Who can change it	What it does	Default
Opening hours	Manager	Sets the times clients can be booked, for each day of the week.	Monday to Friday, 9:00 to 17:00
Buffer time	Manager	Keeps some minutes free after each appointment, for cleaning or notes.	None
Reminder emails	Manager	Emails the client a reminder before the appointment.	On, the day before

6. Troubleshooting

What you see	Likely cause	What to do
A slot is gray although the staff member is free	The slot is outside opening hours, or the buffer after the previous appointment covers it	Ask a manager to check Opening hours and Buffer time in Settings. A manager can still book the slot with Override .
The client says no confirmation email arrived	The email address is mistyped, or the email went to spam	Open the client and check the address, then click Resend confirmation on the appointment. Ask the client to look in their spam folder.
Times on the calendar are an hour out	Your profile's time zone does not match your location	Click your initials, then Profile , and correct the time zone. Sign out and back in.
Settings is missing from the left menu	Your role is Staff	Ask a practice manager to make the change, or to change your role.

7. Frequently asked questions

- **Can clients book online by themselves?** Yes, once a manager turns on the booking page in Settings. That page has its own guide.
- **Can I book two clients into one slot?** Only for services set up as group sessions. For any other service the slot shows as taken.
- **Is the client told when I move an appointment?** Yes. Rescheduling emails the client the new time, and cancelling sends a cancellation email.

8. Glossary

Term	Meaning
Slot	A block of time on the calendar that one appointment can fill.
Buffer time	Free minutes kept after an appointment, so the next one cannot start straight away.
No-show	A client who neither arrived nor cancelled. Recording one keeps it in the client's history.
Override	A manager-only option to book outside the normal rules, such as outside opening hours.

9. Getting help

- **In the app:** click **Help** in the left menu to search this manual and the task videos.
- **Support:** use the chat button in the bottom right corner during office hours, or the support email address in your invitation.
- **Include in your message:** your practice's name, the page you were on, what you expected, what happened instead, and a screenshot or short screen recording.

10. Revision history

Manual version	Date	Product version	What changed
1.0	2026-03-02	3.0	First version
1.1	2026-06-15	3.1	Added 4.2, Move an appointment, for the new Reschedule button
2.0	2026-10-20	3.2	New first sign-in steps (3.1) and the Buffer time setting. Every screenshot retaken for the new left menu

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