



Getting Started

with Appointments



This [Getting Started Guide](#) will walk you step-by-step through configuring iClassPro's Appointments feature for the Office Portal and Customer Portal/Mobile App. The Appointments feature makes it easy to create one-off or recurring private or semi-private lessons.

Once you've completed the steps below, you will be ready to create Appointment Timeslots, book students for lessons, and enable the feature for the Customer Portal/Mobile App so your customers can create their own Appointment bookings online.



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STEP 1

Determine the Best Event Type

First, consider whether the event you are setting up would be best configured as a Class, Camp, or Appointment. You can use the chart below to help you determine which event type should be used based on several factors, including:

- Your **INTENDED AUDIENCE** for the event
- The **EVENT DURATION**
- How **TUITION/FEES** should be charged
- The **SCHEDULE** of when/how often the event will take place
- Whether the event is compatible with **PUNCH PASSES**
- Any additional **UNIQUE FEATURES** that apply to the specific event type.

	CLASS	CAMP	APPOINTMENT
INTENDED AUDIENCE	Group	Group	Private or Semi-Private
EVENT DURATION	Weekly or Multiple Times Per Week	One-Time or Short duration	One-Time or Recurring
TUITION/FEES	Charged Monthly or Per-Session	Charged Once (<i>usually up-front</i>)	Charged for each timeslot booked
SCHEDULE	Recurring (Fixed)	One-Time (Fixed)	One-Time or Recurring (Fixed)
PUNCH PASS COMPATIBLE	Yes	No	Yes
UNIQUE FEATURES	Supports Makeup & Trial Enrollments	Questions with Upcharge Options	Cancellation & Reschedule Options

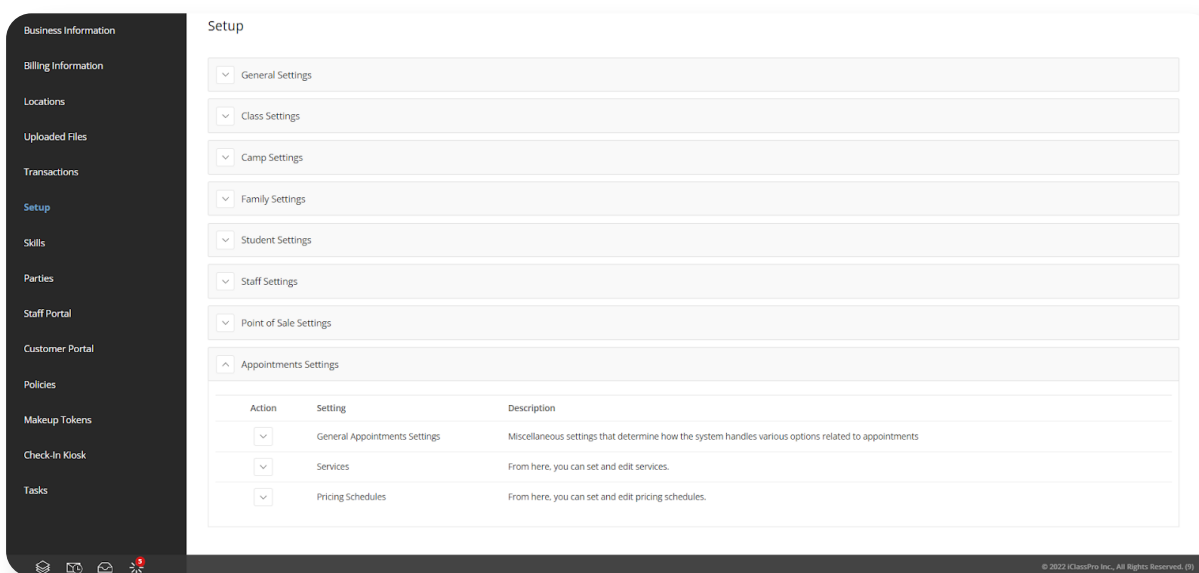
How to Configure the Appointments Settings

To use the Appointments feature, you will need to first configure several different settings that determine how the system handles various options related to appointments.


General Appointments Settings

General Appointments Settings define how the system will handle certain tasks related to Appointments, including whether Blackout Dates should apply to the Appointment schedule, whether a fee should be charged for cancellations, and which hours the facility is available for Appointment bookings.


1. Navigate to **SETTINGS > SETUP > APPOINTMENTS SETTINGS**.



2. Expand the “General Appointments Settings” area.

 General Appointments Settings

General Appointment Settings

☒ Apply Blackout Dates to Appointments 

☐ Charge Cancellation Fee

Send appointment **reminder** days prior to appointment (optional)

Send appointment **followup** days after appointment (optional)

Facility Availability Hours

<input type="checkbox"/> Sunday	<input type="text"/>	thru	<input type="text"/>	Apply to All
<input type="checkbox"/> Monday	<input type="text"/>	thru	<input type="text"/>	Apply to All
<input type="checkbox"/> Tuesday	<input type="text"/>	thru	<input type="text"/>	Apply to All
<input type="checkbox"/> Wednesday	<input type="text"/>	thru	<input type="text"/>	Apply to All
<input type="checkbox"/> Thursday	<input type="text"/>	thru	<input type="text"/>	Apply to All
<input type="checkbox"/> Friday	<input type="text"/>	thru	<input type="text"/>	Apply to All
<input type="checkbox"/> Saturday	<input type="text"/>	thru	<input type="text"/>	Apply to All

Save

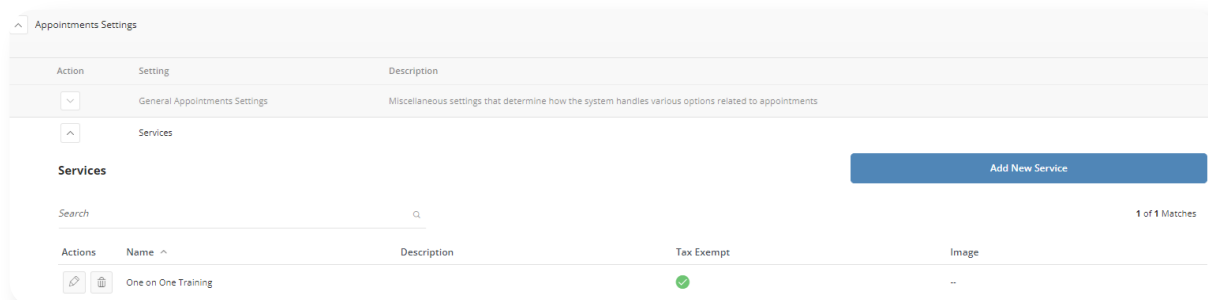
3. Enable or disable the options based on how you want the system to behave.



For more information about General Appointments Settings, [click here!](#)

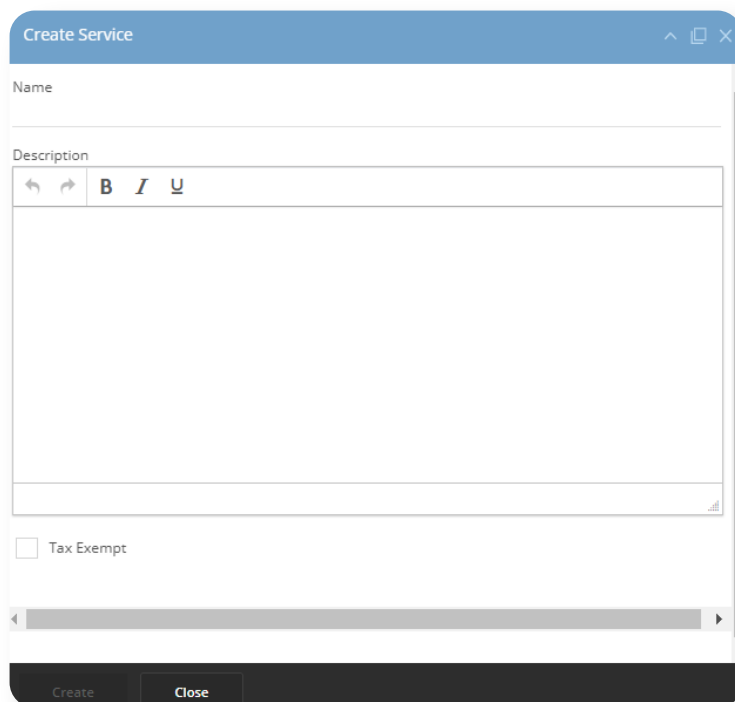
Services

A "Service" defines the specific intention of the Appointment. Each Appointment is linked to a specific Service. The defined Service name is displayed on the Customer Portal/Mobile App in place of the word "Appointment", similar to how Camps use "Camp Types" to group similar camps together.



To create a new Service:

1. Click "Add New Service."
2. Enter a NAME for the Service being offered.
3. (Optional) Enter a DESCRIPTION for the Service being offered.
4. Enable the "Tax Exempt" option if Appointments associated with the Service
5. should not be subject to Sales Tax.
6. Click SAVE to create the new Service.



The screenshot shows a 'Create Service' dialog box with a blue header bar containing the title 'Create Service' and window control icons. The form has two main input fields: 'Name' and 'Description'. The 'Description' field includes a rich text editor toolbar with undo, redo, bold, italic, and underline icons. Below the description field is a checkbox labeled 'Tax Exempt'. At the bottom of the dialog, there are two buttons: 'Create' and 'Close'.



Pricing Schedules

Pricing schedules are how iClassPro's Appointments feature determines how much to charge for Appointments including multi-student discounts. At least one pricing schedule must be created before an Appointment can be created and saved.

Pricing Schedules support a single defined fee that is charged for each Timeslot booked. If Appointments associated with the Pricing Schedule will allow multiple students, you can add columns to define pricing for additional students. This allows you to use the same Pricing Schedule for Private Lessons and Semi-Private Lessons by adjusting the number of bookings allowed.

Edit Pricing Schedule

Pricing Schedule Name

Default Appointment Pricing

Add a Column Add Multiple Columns

	1	2
	50	100

Save Save & Close Close

If the "Group Appointment" option is NOT enabled for the Appointment Timeslot, billing will be charged per-student.

For example, if the Pricing Schedule is set up to account for up to three bookings and "Group Appointment" is NOT enabled, the system will charge the price in Column 1 for each student booked into the Appointment.

If the "Group Appointment" option IS enabled for the Appointment Timeslot, billing will be based on the maximum number of bookings allowed, not on the actual number of bookings.

For example, if the Pricing Schedule is set up to account for up to three bookings and "Group Appointment" is enabled, the system will charge the price in Column 3.

NOTE: It must be stressed that Group Appointments are associated with a single student, even if the booking family invites additional students to attend. Therefore, the enrolling family will be responsible for all fees associated with a Group Appointments booking.



STEP 3

How to Create Appointments/Appointment Timeslots

During the Appointment creation process, you will need to assign certain field values, such as:

- Instructor
- Service
- Program
- Pricing Schedule
- Zone

If needed, you will be given the option to create a new Instructor, Service, Program, Pricing Schedule, or Zone during the Appointment Timeslot process. However, this slows down the creation process so it may be preferable to create these in advance.


The screenshot displays the iClassPro Appointments interface. At the top, there is a navigation bar with icons for Dashboard, Families, Students, Classes, Appointments, Camps, Enrollments, Skills, Parties, Calendar, Staff, Time Clock, Reports, and Transcripts. Below the navigation bar, the main header shows 'Appointments' and 'Sunshine Kids II'. On the right, there are buttons for 'New Service' and 'New Appointment'. A search bar is located below the header. Below the search bar, there are filters for Date Range, Time, Days of the Week (Su, M, Tu, W, Th, F, Sa), Instructors, Services, Zones, Programs, Open/Full status, and Session status (Once/Recurring, Not Checked In/Checked In, Non-Group/Group). The main content area shows a list of 8 matches and 17 timeslots. Each row represents an appointment with columns for Appointment, Service, Zone, Availability, Start Date/Time, Instructor, and Students. The 'Availability' column shows the number of available slots (e.g., 1/1 Available, 3/3 Available). The 'Start Date/Time' column shows the date and time range (e.g., Wed Nov 23, 2022 10:00 AM - 10:30 AM). The 'Instructor' column shows the name of the instructor (e.g., Norman Clegg). The 'Students' column shows a 'Book' button. The interface is clean and modern, with a blue and white color scheme.

Appointment	Service	Zone	Availability	Start Date/Time	Instructor	Students
Thanksgiving One-on-One Sessions	One on One Training	Gym	1/1 Available	Wed Nov 23, 2022 10:00 AM - 10:30 AM Recur daily, starting from 11/23/2022, until 11/26/2022	Norman Clegg	Book
Thanksgiving Group Sessions	One on One Training	Gym	3/3 Available	Wed Nov 23, 2022 11:00 AM - 12:00 PM Recur daily, starting from 11/23/2022, until 11/26/2022	Norman Clegg	Book
Thanksgiving One-on-One Sessions	One on One Training	Gym	1/1 Available	Thu Nov 24, 2022 10:00 AM - 10:30 AM Recur daily, starting from 11/23/2022, until 11/26/2022	Norman Clegg	Book
Thanksgiving Group Sessions	One on One Training	Gym	3/3 Available	Thu Nov 24, 2022 11:00 AM - 12:00 PM Recur daily, starting from 11/23/2022, until 11/26/2022	Norman Clegg	Book
Thanksgiving One-on-One Sessions	One on One Training	Gym	1/1 Available	Fri Nov 25, 2022 10:00 AM - 10:30 AM Recur daily, starting from 11/23/2022, until 11/26/2022	Norman Clegg	Book
Thanksgiving Group Sessions	One on One Training	Gym	3/3 Available	Fri Nov 25, 2022 11:00 AM - 12:00 PM Recur daily, starting from 11/23/2022, until 11/26/2022	Norman Clegg	Book

To create a new Appointment:

A "Service" defines the specific intention of the Appointment. Each Appointment is linked to a specific Service. The defined Service name is displayed on the Customer Portal/Mobile App in place of the word "Appointment", similar to how Camps use "Camp Types" to group similar camps together.

1. Navigate to the APPOINTMENTS page.
2. Click the NEW APPOINTMENT button in the upper right-hand corner of the page to open the CREATE APPOINTMENT window.


Create Appointment

Appointment Name *

Details *

1

0

99

Co-Ed

OCCUPANCY

MINIMUM AGE

MAXIMUM AGE

GENDER

Search instructor name (3 characters min.)

New

Search service name (3 characters min.)

New

Search program name (3 characters min.)

New

Search pricing schedule name (3 characters min.)

New

Search zone name (3 characters min.)

New

INSTRUCTOR *

SERVICE *

PROGRAM *

PRICING SCHEDULE *

ZONE

Description

File

Edit

Insert

View

Format

Table

Tools

3. Enter a NAME for the Appointment.
4. Enter the Appointment DETAILS and DESCRIPTION.

5. Define the SCHEDULE for the Appointment, including the FREQUENCY and DATE/TIME.

a. If the FREQUENCY is set to "Recurring", you will need to specify how often the Appointment will occur.

- i. Daily, and how often (every 1, 2, 3 days, etc.)
- ii. Weekly (on a specific Day of the Week), and how often (every 1, 2, 3 weeks, etc.)
- iii. Monthly (on a specific Day of the month or Ordinal Day of the Week)
 - 1. Start/End Date
 - 2. Start/End Time

b. If the FREQUENCY is set to "One Time", you will need to define when the Appointment will occur:

- i. Start Date
 - 1. *NOTE: Since this is a "One Time" Appointment, the End Date will automatically be set to match the Start Date.*
- ii. Start Time/End Time

6. Set OTHER Appointment details.

The screenshot shows a web interface for scheduling appointments, divided into two main sections: 'Schedule' and 'Other'.

Schedule Section:

- Frequency:** Two tabs are visible: 'One Time' (selected with a radio button) and 'Recurring'.
- Date and Time:** This section contains four input fields:
 - START DATE:** A date picker showing '11/12/2022'.
 - START TIME:** A time picker.
 - thru:** A label indicating a range.
 - END TIME:** A time picker.

Other Section:

- Options:** Three checkboxes are present:
 - ☐ Show to Customers
 - ☐ Group Appointment
 - ☐ Allow Web Registration
- Attach:** Three dropdown menus are listed:
 - Keywords
 - Promo Codes
 - Skill Trees

At the bottom of the form, there are two buttons: a green 'Save' button and a white 'Close' button.

7. SAVE the Appointment Timeslot.

Once an Appointment Timeslot has been created, it can be duplicated using the "Duplicate Timeslot" button at the bottom of the "Edit Appointment" window.



STEP 4

How to Enable and Configure Appointments for the Customer Portal/Mobile App

Allowing Appointments to Show in the Customer Portal/Mobile App

Each Appointment Timeslot allows you to define whether the following visibility options for the Customer Portal/Mobile App:

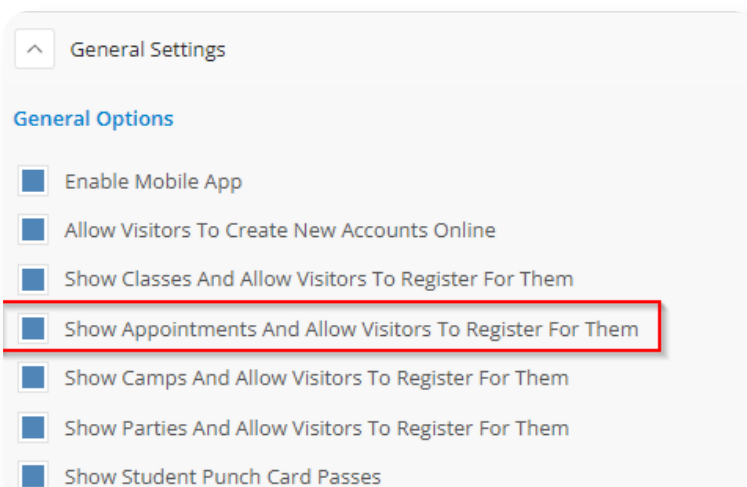
- **Show to Customers** - if enabled, the Appointment Timeslot will be displayed on the Customer Portal/Mobile App.
- **Allow Web Registration** - if enabled, customers will be able to register for the Appointment Timeslot in the Customer Portal/Mobile App.

Enabling Appointments for the Customer Portal/Mobile App

To enable the Appointments feature for the Customer Portal, navigate to

SETTINGS > CUSTOMER PORTAL > OTHER SETTINGS > GENERAL SETTINGS

and enable the option to "Show Appointments And Allow Visitors To Register For Them."



Configuring Appointments Settings

The Appointments settings determine how the system handles requests to book Appointments via the Customer Portal/Mobile App.

1. Navigate to **SETTINGS > CUSTOMER PORTAL > OTHER SETTINGS > APPOINTMENTS.**
2. Expand the “General Appointments Settings” area.
3. Enable or disable the options based on how you want the system to behave.

^ Appointments

Action	Setting	Description
^	General Appointment Settings	Miscellaneous settings that determine how the customer portal handles various options related to appointments.

0

LIMIT BOOKING START DATE TO AT LEAST X DAYS FROM TODAY.

120

LIMIT BOOKING START DATE TO AT MOST X DAYS FROM TODAY.

☒ Auto Approve Appointments

☒ Allow Customers to cancel appointments
Cancellation Timeframe

0

0

20

DAYS

HOURS

MINUTES

☒ Allow Rescheduling
Rescheduling Timeframe

0

0

20

DAYS

HOURS

MINUTES

☒ Auto Approve Rescheduled Appointments

☐ Send Email Notification Upon Auto-Approved Rescheduled Appointment To Email Address Of Appointment Location

☐ Send Confirmation Email to Instructor

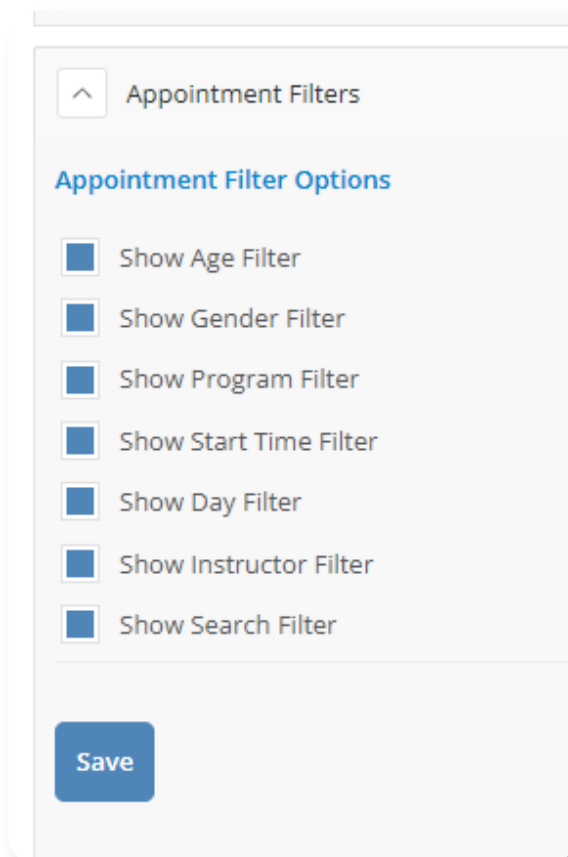
Save

- a. **Limit booking start date to at least X days from today** - limits the start date of an Appointment booking to at least this number of days in the future from the date of registration. (For example, if set to "2", customers cannot book an Appointment less than two days in advance.)
- b. **Limit booking start date to at most X days from today** - limits the start date of an Appointment booking to at most this number of days in the future from the date of registration. (For example, if set to "2", customers cannot book an Appointment more than five days in advance.)
- c. **Auto Approve Appointments** - enables the Customer Portal/Mobile App to automatically approve Appointment requests for students where an opening exists and the students meet the established requirements of age and gender. This must be enabled to allow the Customer Portal/Mobile App to charge for bookings and to collect payment.
- d. **Allow Customers to cancel appointments** - if enabled, customers will be allowed to cancel Appointments from the Customer Portal/Mobile App.
 - i. **Cancellation Timeframe (Days/Hours/Minutes)** - limits the cancellation timeframe based on a certain number of Days/Hours/Minutes before the scheduled appointment timeslot.
 1. NOTE: If "Charge Cancellation Fee" is enabled under **SETTINGS > SETUP > APPOINTMENT SETTINGS > GENERAL APPOINTMENT SETTINGS**, the system will charge a cancellation fee accordingly.

- e. **Allow Rescheduling** - if enabled, customers will be allowed to reschedule Appointments from the Customer Portal/Mobile App.
 - i. **Rescheduling Timeframe (Days/Hours/Minutes)** - limits the rescheduling timeframe based on a certain number of Days/Hours/Minutes before the scheduled appointment timeslot.
 - ii. **Auto Approve Rescheduled Appointments** - if enabled, the system will automatically approve rescheduled appointments if they are submitted within the Rescheduling Timeframe.
 - iii. **Send Email Notification Upon Auto-Approved Rescheduled Appointment To Email Address Of Appointment Location** - if enabled, the system will send an email to the address of the Appointment location if a rescheduled appointment request is automatically approved.
 - iv. **Send Confirmation Email to Instructor** - if enabled, the system will send an email to the address of the Appointment instructor if a rescheduled appointment request is automatically approved.
 - 1. NOTE: If "Charge cancellation fee for rescheduled appointments" is enabled under **SETTINGS > SETUP > APPOINTMENT SETTINGS > GENERAL APPOINTMENT SETTINGS**, the system will charge a cancellation fee accordingly.
4. SAVE any changes.
5. Click on the pencil/edit icon next to the Auto-Charge Scheduler to configure your charge category schedule for Appointments charges.

Configuring Appointments Filter Settings

1. Navigate to **SETTINGS > CUSTOMER PORTAL > OTHER SETTINGS > APPOINTMENT FILTERS**
2. Enable or disable the filter options to be displayed in the Customer Portal/Mobile App.



The screenshot shows a settings panel titled "Appointment Filters" with a collapse icon (upward arrow) to its left. Below the title is a section header "Appointment Filter Options" in blue. Under this header, there are seven filter options, each with a blue square checkbox and the text "Show [Filter Name] Filter":

- ☒ Show Age Filter
- ☒ Show Gender Filter
- ☒ Show Program Filter
- ☒ Show Start Time Filter
- ☒ Show Day Filter
- ☒ Show Instructor Filter
- ☒ Show Search Filter

At the bottom of the panel is a blue "Save" button.

3. **SAVE** any changes.



Email Templates

The system will use the following automated email templates to notify customers of actions related to Appointments

SETTINGS > SETUP > GENERAL SETTINGS > EMAIL TEMPLATES > "iClassPro"

Emails that are automatically sent for actions that are performed in the Office Portal.

- **New Appointment** - Sent when a staff member creates an appointment booking. Includes booking details.
- **Appointment Cancellation** - Appointment cancellation notice.
- **Appointment Followup** - Sent to follow up with the customer 'X' days after a booking has been attended (as defined by the "Send appointment followup 'X' days after appointment" setting).
- **Appointment No Show** - Sent when a student is marked absent for an appointment.
- **Appointment Reminder** - Sent to the customer 'X' days prior to the Appointment date (as defined by the "Send appointment reminder 'X' days prior to appointment" setting).
- **Appointment Rescheduled** - Appointment rescheduled notice.

**SETTINGS > SETUP > GENERAL SETTINGS > EMAIL TEMPLATES >
“Customer Portal”**

Emails that are automatically sent for actions that are performed in the Customer Portal/Mobile App.

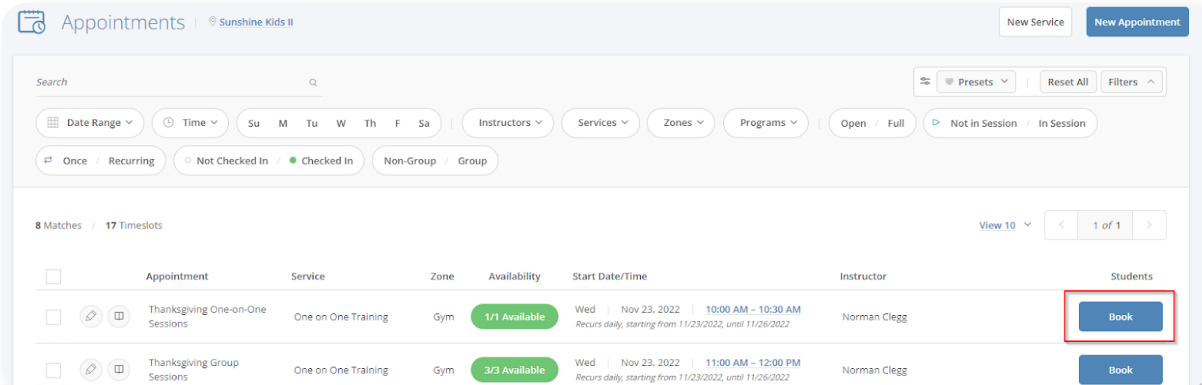
- **Appointment Booking (Approved)** - An email sent to customers for each appointment booking processed through the Customer Portal/Mobile App. Includes the booking details and a transaction summary from checkout.
- **Appointment Booking (Request)** - An email sent to customers for each appointment booking processed through the or Customer Portal/Mobile App that was submitted as a request. Includes the booking details.



STEP 6

How to Create an Appointment Booking

Creating a Booking In the Office Portal



1. From the APPOINTMENTS page, locate the Appointment Timeslot for which you wish to create a booking.
2. Once you have located the Appointment Timeslot in which you wish to create a booking, click the BOOK button to the right of the entry. This will launch the "Book Appointment" screen.
3. Under the "Book Appointment" section, click SELECT STUDENT to launch the "Search Students" window and choose the student for whom you wish to create a booking.

STEP 6 continued

The screenshot shows the 'Book Appointment' form. At the top, there's a header 'Appointments' with a back arrow and the text 'Appointments // Book Appointment'. Below this is a section titled 'Book Appointment'. Underneath, there's a 'Timeslot Info' section with a list of details: 'Thanksgiving One-on-One Sessions', '11:00 AM - 11:30 AM (11/23/2022)', 'One on One Training', 'Norman Clegg', 'Ages 0 - 99', 'Gender not specified', and 'Capacity 1'. To the right of this list is a 'Show' button. Below the 'Timeslot Info' section is a 'Student' section with a circular icon containing a person silhouette and a red-bordered button labeled 'Select Student'.

4. After selecting the student, define the SCHEDULE for the booking and select any OTHER details.

The screenshot shows the 'Schedule' form. At the top, there's a header 'Schedule' with a clock icon. Below this is a 'Frequency' section with two buttons: 'Recurring' and 'Non-Recurring' (which is selected). Underneath is a 'Select Timeslot(s)' section. It has a 'START DATE' field with '11/23/2022' and a 'thru' field with '11/23/2022'. Below these are seven circular buttons for days of the week: 'Any', 'Sun', 'Mon', 'Tue', 'Wed', 'Thu', 'Fri', 'Sat'. The 'Any' button is selected. Below the day buttons is a button labeled 'Select All Days (1)'. At the bottom, there's a blue box containing the text 'Nov 23, 2022' and 'Wed | 11:00 AM - 11:30 AM'.

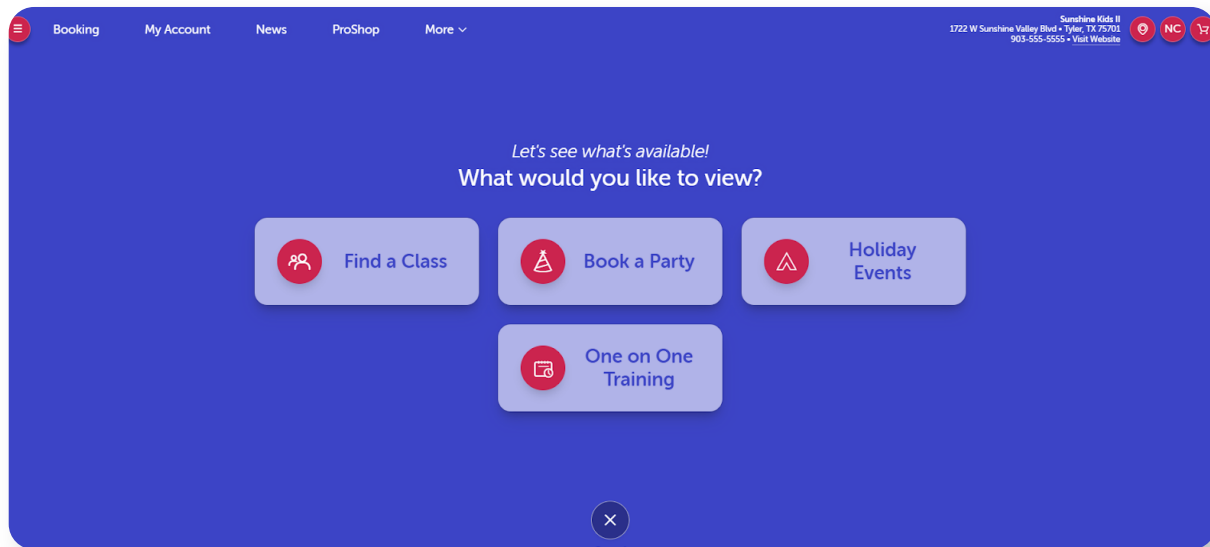
5. After entering all of the required information, SAVE the booking.



For more information about booking from the Office Portal, [click here!](#)

Booking an Appointment in the Customer Portal/Mobile App

1. From the Customer Portal/Mobile App dashboard, click the BOOKING button.



2. Click the icon for the Appointment service for which you wish to book an Appointment.
 - a. If you have already logged in and there are multiple students on your account, you will be prompted to select one or more students to enroll.
 - i. After selecting the student(s), select an available Appointment.
 - b. If you have NOT logged in, select an available Appointment, then click on SELECT STUDENTS to book the Appointment.
 - i. You will be prompted to log in. After logging in, select the student/students to enroll, then click CONTINUE.

3. The system will display the APPOINTMENT DETAILS.

The screenshot shows a web interface for 'Event Details'. At the top is a blue header with the text 'Event Details'. Below this is a white section titled 'Thanksgiving One-on-One Sessions'. Inside this section is a large red button labeled 'Book Now!'. Below the button, it says 'Available for Nadine, Norm'. A blue link labeled 'Details' is positioned above a horizontal line. Below the line is a light gray box containing appointment details: 'Schedule: Recurs daily, starting from 11/23/2022, until 11/26/2022 | 10:00 AM - 10:30 AM' with a 'View Schedule' link; 'Instructor: Norman Clegg'; 'Program: Elite Tumbling'; and 'Capacity: 1 Participant'.

Event Details	
Thanksgiving One-on-One Sessions	
Book Now!	
Available for Nadine, Norm	
Details	
Schedule:	Recurs daily, starting from 11/23/2022, until 11/26/2022 10:00 AM - 10:30 AM View Schedule
Instructor:	Norman Clegg
Program:	Elite Tumbling
Capacity:	1 Participant

- a. Depending on how your Customer Portal/Mobile App Appointment Settings are configured, customers will see one of two options:
- i) If "Auto Approve Appointments" is ENABLED, the customer will see "Book Now!"
 - ii) If "Auto Approve Appointments" is DISABLED, the customer will see "Submit Request."

4. Clicking either "Book now!" or "Submit Request" will bring up the "New Enrollment" screen so the customer can select the Appointment booking details, including the date(s) they wish to attend.

New Enrollment

Thanksgiving One-on-One Sessions

Enrolling Students:

☒ Nadine Clegg
☐ Norm Clegg

Date:

11/23/2022

START DATE

Anything else we need to know?

Select Days:

All

W

Th

F

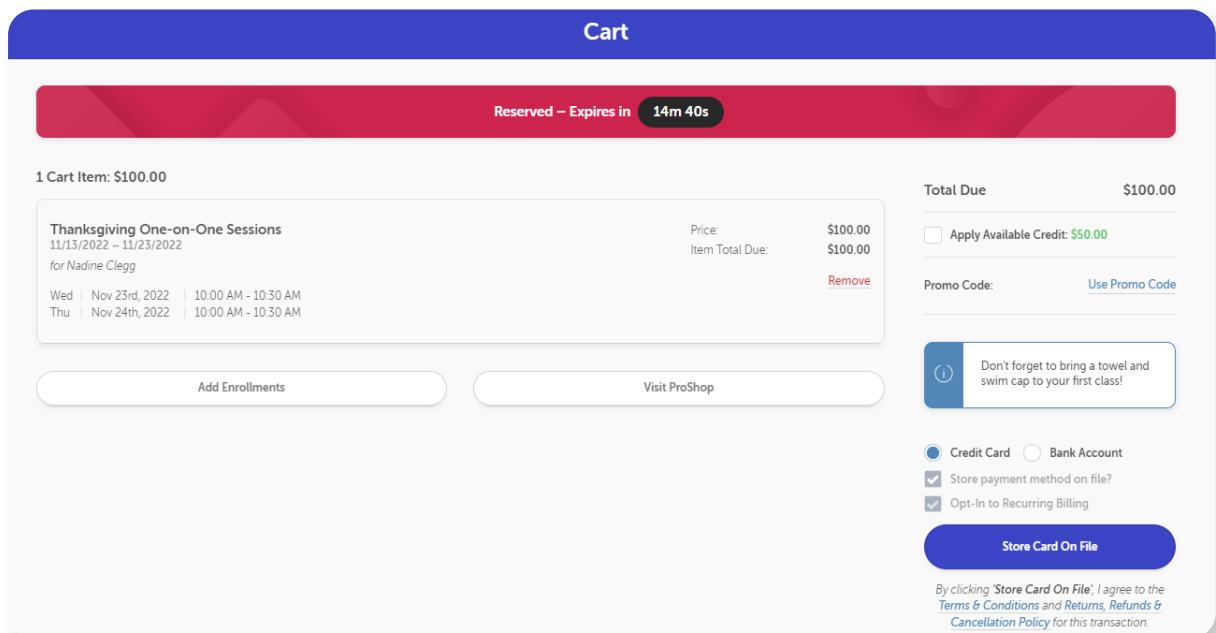
Sa

☒ Wed, Nov 23rd, 2022
10:00 AM - 10:30 AM

☐ Thu, Nov 24th, 2022
10:00 AM - 10:30 AM

☐ Fri, Nov 25th, 2022

5. Once all details have been entered, choose ADD TO CART to add the Appointment enrollment to the Shopping Cart.



Cart

Reserved – Expires in **14m 40s**

1 Cart Item: \$100.00

Thanksgiving One-on-One Sessions		
11/13/2022 – 11/23/2022		
for Nadine Clegg		
Wed	Nov 23rd, 2022	10:00 AM - 10:30 AM
Thu	Nov 24th, 2022	10:00 AM - 10:30 AM

Price: \$100.00
Item Total Due: \$100.00
[Remove](#)

[Add Enrollments](#) [Visit ProShop](#)

Total Due \$100.00

☐ Apply Available Credit: \$50.00

Promo Code: [Use Promo Code](#)

Don't forget to bring a towel and swim cap to your first class!

☒ Credit Card ☐ Bank Account

☒ Store payment method on file?

☒ Opt-In to Recurring Billing

[Store Card On File](#)

By clicking 'Store Card On File', I agree to the [Terms & Conditions and Returns, Refunds & Cancellation Policy](#) for this transaction.

6. Complete the checkout process to submit the Appointment Booking.



Congratulations!

You have successfully configured and learned how to use the Appointments feature. Feel free to refer to this guide any time you need to create new Appointment Timeslots or bookings.



Questions?

Please feel free to reach out to our helpful support team [here!](#)

