

Help Guide

The following Help Guide is designed to assist you in maximizing your experience with Scheduly. For additional assistance, please contact us at: support@scheduly.com

In the Help Guide, you will find answers to the following questions:

1. OK, I signed up – what's next?
2. How do I setup my business services?
3. How do I add my business logo and Google map?
4. How do I invite my clients to book appointments?
5. Does Scheduly send a confirmation email?
6. Does Scheduly send a reminder email?
7. How do I sync my Calendar with Scheduly?

You can find our full features list on <http://www.scheduly.com/features.aspx>

OK, I signed up – What's next?

We recommend that you follow the steps on the welcome page; this will assist you in customizing your account and maximizing your benefits with Scheduly.

After a step is completed, we automatically update it with strikethrough text, and comment "done" next to it.

You can also share Scheduly with your clients by clicking the Facebook "like" button on the Scheduly website.

Welcome to Scheduly :)

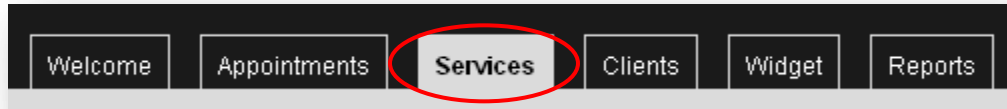
Complete these quests and enjoy Scheduly's full functionality:

- ~~Set your business services~~ **done!**
- [Set your business location on the map](#)
- [Upload your business logo/photo](#)
- [Invite your clients](#)

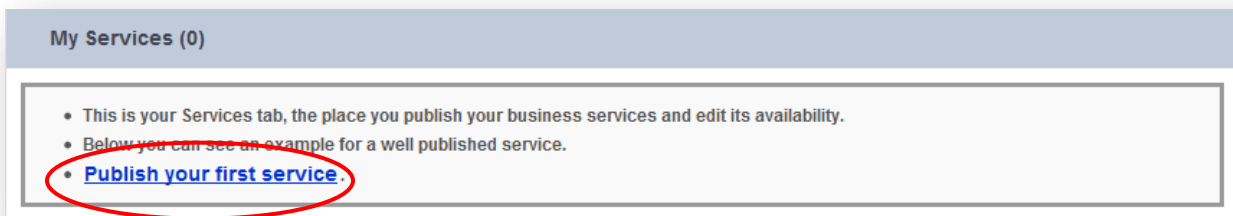
How do I setup my business services?

The business services are managed from the services tab:

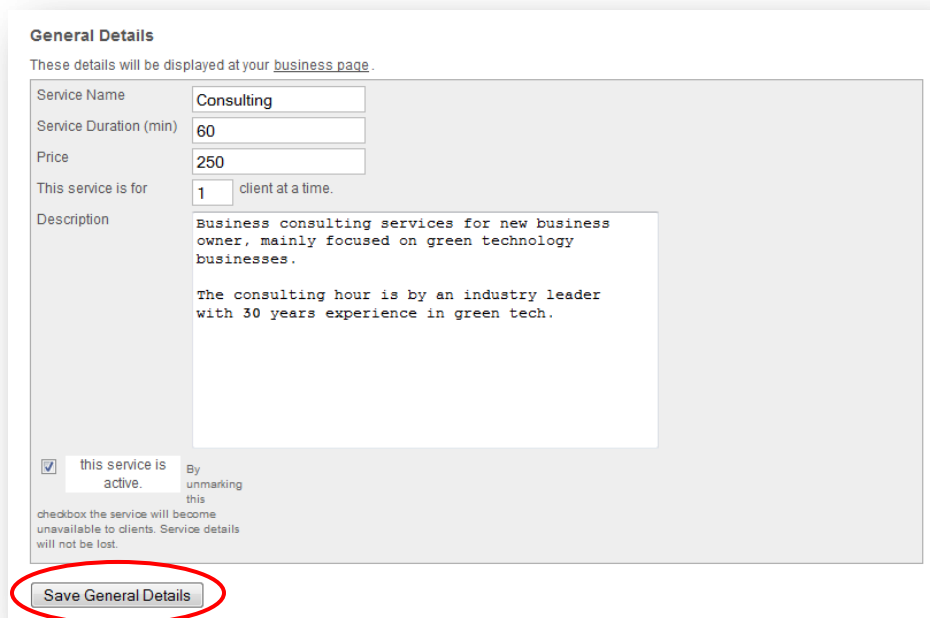
1. Go to the **Services** tab in order open a new service and set your service work hours.



2. Click on “**Publish your first service,**” and enter the service details.



3. Click on “**Save General Details,**” and then scroll down to set your service working hours.

A screenshot of the 'General Details' form. The form includes fields for 'Service Name' (Consulting), 'Service Duration (min)' (60), 'Price' (250), and 'This service is for' (1 client at a time). There is a description field with text: 'Business consulting services for new business owner, mainly focused on green technology businesses. The consulting hour is by an industry leader with 30 years experience in green tech.' At the bottom, there is a checkbox labeled 'this service is active.' which is checked. Below the checkbox is a 'Save General Details' button, which is circled in red.

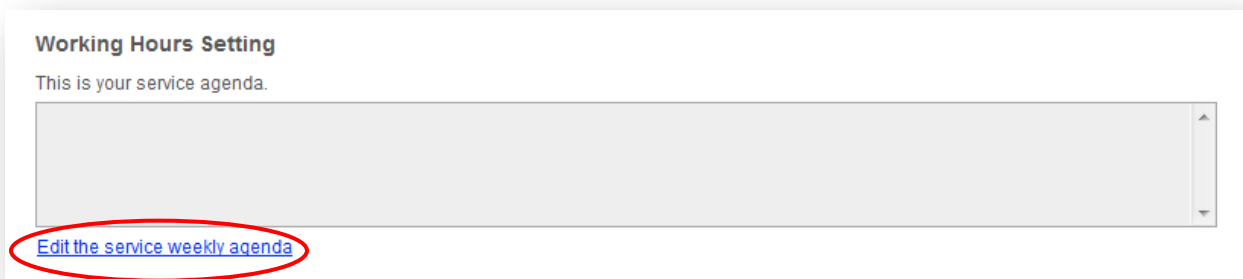
Next, after you've saved the general details regarding your services, you can go ahead and edit the service work hours.

- You can set recurring work hours that will repeat each week.
- Or, you can set dynamic work hours for a specific date that will apply only for that date.

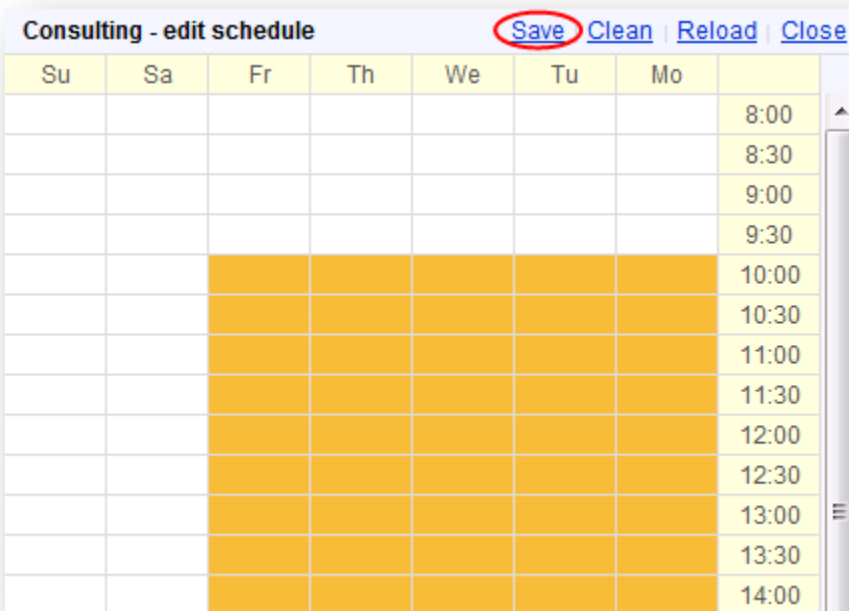
Note: If you set recurring work hours *AND* add a dynamic slot, the dynamic slot will override the recurring work hours for that specific date.

Setting Recurring Work Hours

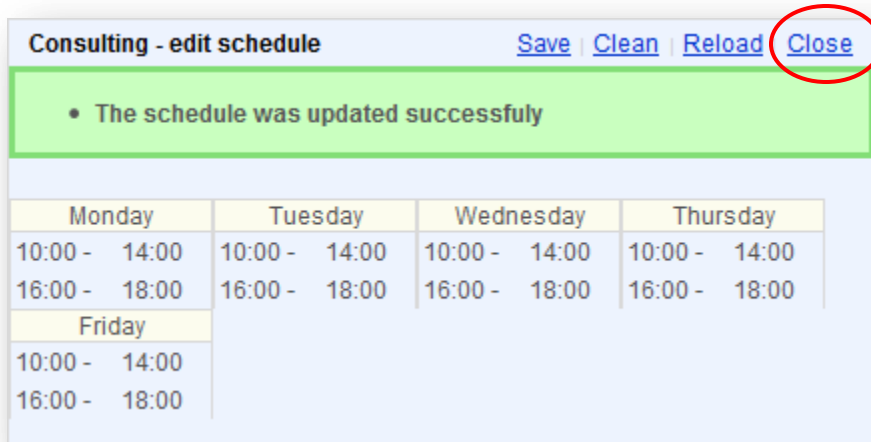
1. Click on “**Edit the service weekly agenda**” and click on the hours.



2. Click “**Save.**” Remember, you can update your hours at any stage later on.



- Close the work hours editor.



- And it should appear as it is displayed here:



Setting Dynamic Work Hours

You can also open **dynamic time slots** for scheduling, based on specific hours on a certain date per service.

Choose the date and the work hours; it's that simple! (Use date format mm/dd/yyyy)

Note: On dates that you have a recurring agenda, the dynamic slots will replace them.

Working hours for specific date

Here you can set working hours for specific date.

By doing so the recurring working hours for that day will be replaced by the schedule you'll set here.

[Set working hours for specific date here...](#)

Date	<input type="text" value="08/23/2010"/>
Start Time	<input type="text" value="10"/> : <input type="text" value="00"/>
End Time	<input type="text" value="12"/> : <input type="text" value="00"/>
<input type="button" value="ok"/> <input type="button" value="cancel"/>	

On date: Monday, August 23, 2010 From: 10:00 To: 12:00 [Delete](#)

Now you can scroll back up (still under the service tab), and click on the “**view**” link in order to see your own personal Scheduly business page (just like you have your own page on Facebook or LinkedIn). You may delete the service at any time.

Consulting

last modified on 05/26/2010

[Delete](#)

Service provider name: Sandra Lex

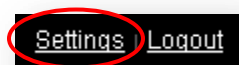
This is your service page URL, where your clients can make appointments with you.

Copy this link or [email to your clients directly from here](#).

[select view](#)

How do I add my business logo and Google map?

1. Press on the Settings link on the upper right corner of the screen.



2. Under the setting screen click on the photo link and upload your photo

Settings | [Private Details](#) | [Business Details](#) | [Email & Password](#) | **Photo** | [Map](#) | [Notifications](#) | [Reminders](#) | [Google Sync](#)

Your Photo

Upload your photo or logo, it will be displayed with all your business details on your business page and next to your short business description..

The image must be a jpeg up to 100KB or gif up to 20KB.

If you still keep getting your old photo after uploaded the new one, just click *Ctrl + F5*.



Image size 64X61
jpeg up to 100KB
gif up to 20KB

No file chosen

3. On the setting screen, click on the map link and insert your address or zip code.

Settings | [Private Details](#) | [Business Details](#) | [Email & Password](#) | [Photo](#) | **Map** | [Notifications](#) | [Reminders](#) | [Google Sync](#)

Your business on the map

By providing an address your location will be displayed on a map at your business card (availability page) so your clients can locate you in no time. If you don't want your address to be published but still want to show your approximate location enter your zip code instead.

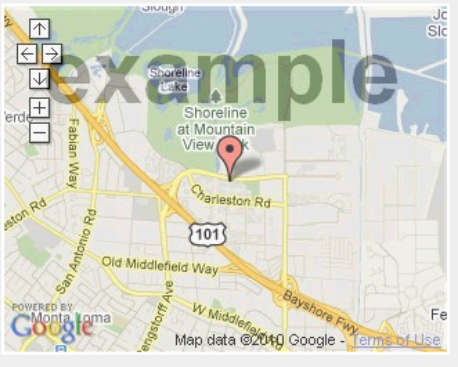
Address

(e.g. 1600 Amphitheatre Parkway, Mountain View, CA)

or

Zip Code

Forgot your ZIP code? [find it here](#)



Map data ©2010 Google - [Terms of Use](#)

Note: you can add both your address and zip code, in that case the map will refer to the address location.

How do I invite my clients to book appointments?

The service ID is the link to your Scheduly page that you can send to your clients in order to allow them to schedule an appointment. For example:

<http://scheduly.com/pages/c/businessPage.aspx?SID=2068>

The screenshot shows a web interface for a service named "Consulting BizDev" managed by Sandra Lex. It features a calendar for August 2010, a list of available time slots, and a confirmation form. The interface is divided into two main sections: (1) Pick Available Time Slot and (2) Confirm Your Selection.

(1) Pick Available Time Slot

Monday, August 23, 2010

Su	Mo	Tu	We	Th	Fr	Sa
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	1	2	3	4
5	6	7	8	9	10	11

Available time slots:

- 10:00 - 11:00
- 11:00 - 12:00
- 12:00 - 13:00
- 13:00 - 14:00
- 16:00 - 17:00
- 17:00 - 18:00

(2) Confirm Your Selection

Monday, August 23, 2010
11:00 - 12:00

*Full name:

*Email Address:

*Phone num':

Short message
200 characters max

200

ok

You can copy the page address and send it to your clients, or click on **"email to your clients directly from here"** in the service tab:

Consulting

last modified on 05/26/2010

[Delete](#)

Service provider name: Sandra Lex

This is your service page URL - where your clients can make appointments with you.

Copy this link [or email to your clients directly from here](#).

[select](#) [view](#)

Does Scheduly send a confirmation email?

For every new appointment, a confirmation email is sent to the customer. Along with the confirmation email, we send a voucher (just like booking a flight or hotel online).

Voucher example:


Approved!

Congrats! You've just set an appointment with **Jazz Piano**

An email with the appointment details is on its way to your inbox

If you have not received any email notification, please check your bulk mail folder..

In order to cancel this appointment, just click the "cancel appointment" link on this page, and a cancel notification will be send to the service provider..

It is recommended to [bookmark this page](#) 

You can also [set it in your calendar](#) 

[print](#)  | [cancel appointment](#) 

Business: Linda Messi

Service: Jazz Piano

Your name: John Smith

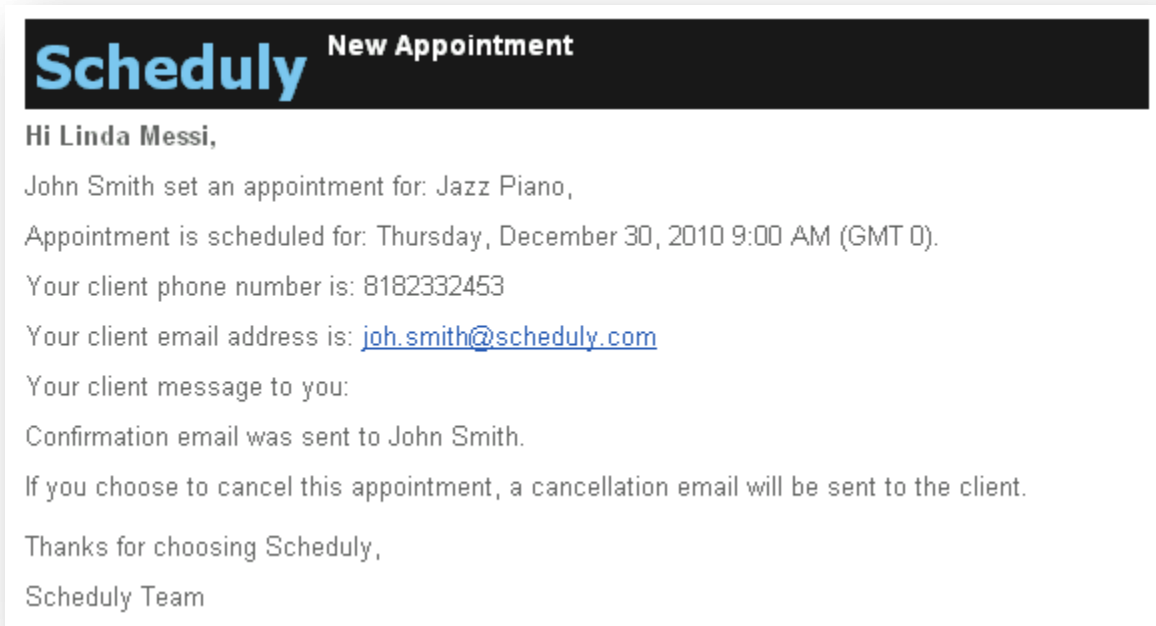
Due date: Thursday, December 30th 2010

Due time: 9:00 AM - 10:00 AM

Your message:

[Back to Jazz Piano](#) 

Email example:



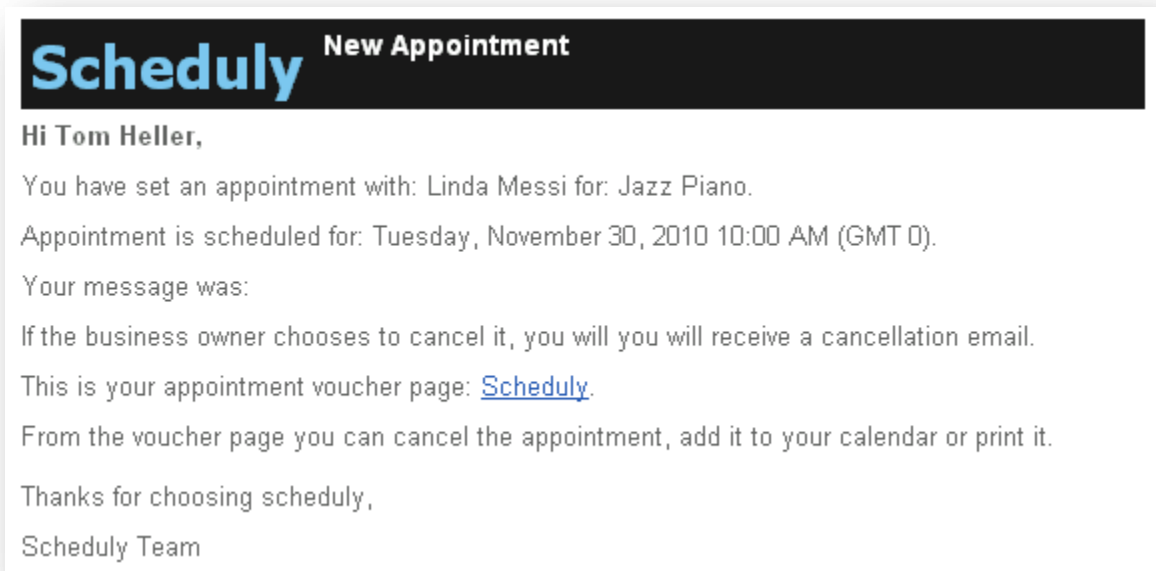
Scheduly **New Appointment**

Hi Linda Messi,

John Smith set an appointment for: Jazz Piano,
Appointment is scheduled for: Thursday, December 30, 2010 9:00 AM (GMT 0).
Your client phone number is: 8182332453
Your client email address is: joh.smith@scheduly.com
Your client message to you:
Confirmation email was sent to John Smith.
If you choose to cancel this appointment, a cancellation email will be sent to the client.
Thanks for choosing Scheduly,
Scheduly Team

Does Scheduly send a reminder email?

A reminder email is sent a day before the appointment. Your client will receive the following email. (Soon, we will allow you to customize the email content.)



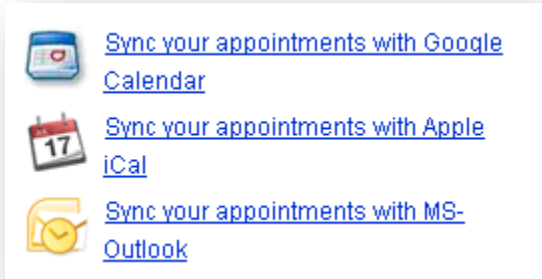
Scheduly **New Appointment**

Hi Tom Heller,

You have set an appointment with: Linda Messi for: Jazz Piano.
Appointment is scheduled for: Tuesday, November 30, 2010 10:00 AM (GMT 0).
Your message was:
If the business owner chooses to cancel it, you will you will receive a cancellation email.
This is your appointment voucher page: [Scheduly](#).
From the voucher page you can cancel the appointment, add it to your calendar or print it.
Thanks for choosing scheduly,
Scheduly Team

How do I sync my Calendar with Scheduly?

Under the appointments tab, you will be able to sync with your favorite calendar. Scheduly isn't a calendar – we provide you with the ability to manage your appointments and to keep working with your existing calendar.



Google Sync

1. Open your Google account
2. Open your Scheduly account in a new tab
3. On Scheduly, go to the settings link (upper right corner) and press Gmail sync
4. Enter your Google email address and press the sync button
5. Google will ask if you grant access to Scheduly for sync - approve it and that's it.

Outlook / Apple Sync

1. Open the calendar
2. Press on the link at Scheduly
3. Accept the browser notification

We sync the appointments only from Scheduly to the calendar, and we do not retrieve any information from your calendar account. Your privacy is important to us.

For additional assistance, please contact us at: support@scheduly.com