

Introduction To Simplybook Booking System

Agenda Item	Topic	Timing
	Welcome and Introduction	5 mins
Part 1	System Overview – getting ready and Day 0	30 mins
Part 2	Day 1 – System walk through patient flow	30 mins
Part 3	Q&A and Discussion	25 mins

Getting Ready

New Account Registration

New clinic registration forms to be completed and returned:

- Name of clinic
- Address, and post code
- Opening hours and days
- Number of vaccinators
- Identify one or two Administrators to manage the Simplybook system for the clinic

New Account Registration

A new account will be created, based on the information on the returned 'New Clinic Registration Form'

Each clinic will arrive set up with the default settings for:

- Email notification templates,
- Time setting for notification
- Calendar settings for bookings– how far in advance can users book, and how close to an available booking slot can a user book.

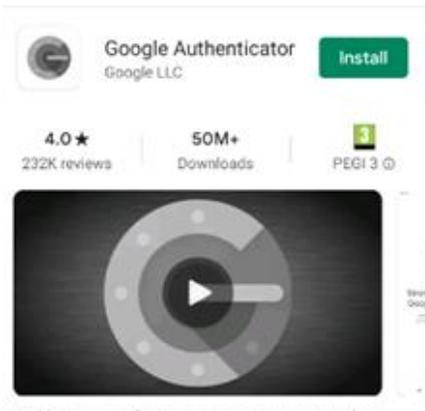
Google Authenticator

For all users with access to PID, they will need to add Google Authenticator on to their own mobile device

- Available to download on both Google Play, and App Store:

https://play.google.com/store/apps/details?id=com.google.android.apps.authenticator2&hl=en_GB

<https://apps.apple.com/us/app/google-authenticator/id388497605>



Day 0

Access

1. You will receive a welcome email once your access has been created.
2. Your email will confirm your username, and a hyperlink to access your account.
3. The first stage will be to create a new password.
4. Save/ note the url, this will be how you access the system going forwards.

For users with access to PID, they will need to add Google Authenticator to their account

Detailed instructions will be provided.

- SimplyBook.me
- Dashboard
- Welcome
- Calendar
- Manage
- Time settings
- Reports
- Custom Features
- Settings
- Marketing Suite
- Plans & Prices
- Live help

It's easy to set up your booking system

Let's get started

- **1. Customize Design**
Watch how ▶
- **2. Services & Providers**
Watch how ▶
- **3. Working Schedules**
Watch how ▶

- **4. Website Integrations**
Watch how ▶
- **5. Custom Features**
Watch how ▶

Frequently used actions

Create booking from dashboard

My account

Admin interface
<https://clone.secure.nhsbookings.com>

Booking website
<https://clone.nhsbookings.com>

Company login
clone

User login
janine.shiers@miaa.nhs.uk
[Change password](#)

Email
janine.shiers@miaa.nhs.uk
[Change email](#)

My plan

Plan
Premium
valid till 23-11-2021

Bookings left
24343

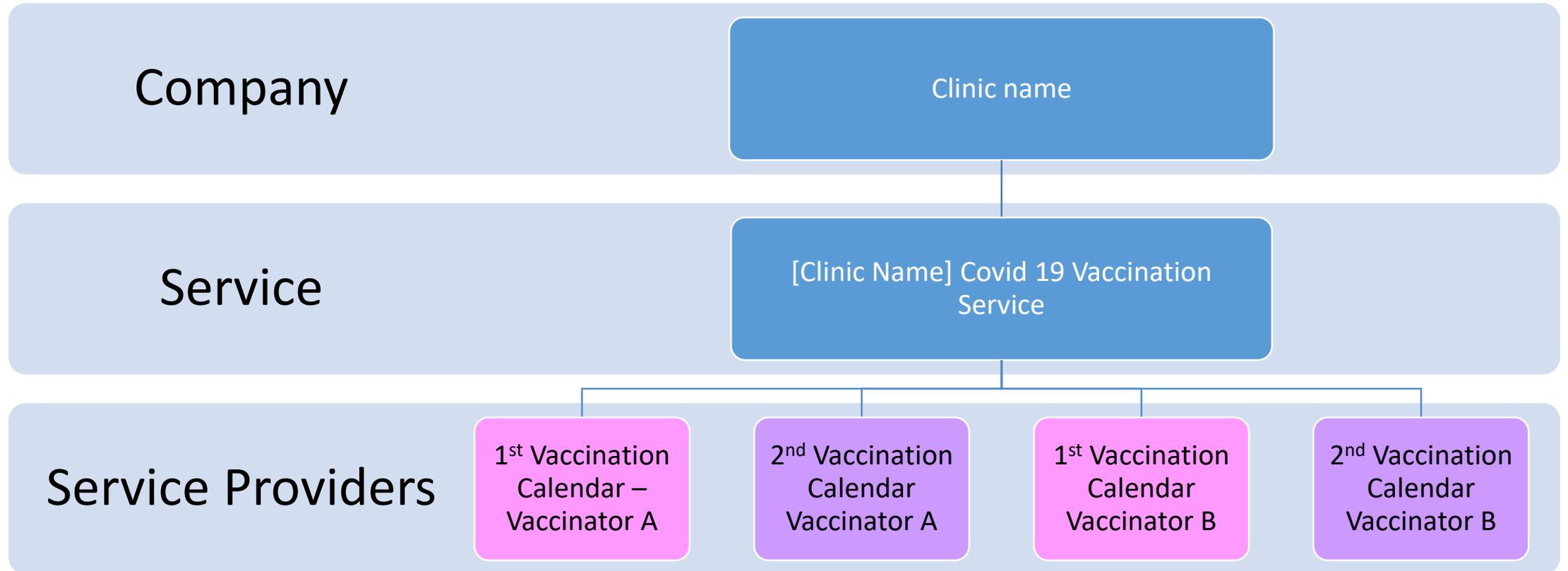
SMS credits left
0

Tickets left
3738

Custom Features used
7 of infinity

[Get personal data report](#)

System Hierarchy



System Terms, and what they mean

- **Company** = Clinic
- **Service** = Vaccination service. There will be one service per clinic
- **Service Provider** = Vaccination Lanes – two per vaccinator.

DEFAULT SETTING: Each Clinic will have 2 x Vaccination Lanes (service providers) PER VACCINATOR

Only the 1st Vaccination lanes will be available for users to book online.

The 2nd Vaccination lanes will be only available for clinic staff to book users for their second appointments.

This means each vaccination lane represents 50% total capacity for each vaccinator.

Service Provider - Vaccination Lanes

DEFAULT SETTING:

Each Vaccinator will have 2 x Vaccination Lanes (service providers).

The number of appointments available to book online per 10 minute slot, per vaccinator is 1.

Only the 1st Vaccination lanes will be available for users to book online. The 2nd Vaccination lanes will be only available for clinic staff to book users for their second appointments.

This means each vaccination lane represents 50% total capacity for the vaccinator.

Service Provider - Vaccination Lanes

Worked example:

If a clinic has 3 x vaccinators.

There will be 6 x vaccination lanes

3 slots will be available to book online for 1st time vaccinations

3 slots will be reserved on a clinic-access only calendar for 2nd vaccinations.

First Steps

1. Navigating the system
2. Creating New Users (system users)
3. Amending the name of the Service – the default is '**[Name of the clinic] – Covid 19 Vaccination Service**'
4. Amending vaccination lane (Service Provider) –name, time
5. Adding additional vaccination lane (Service Provider)
6. Deleting vaccination lane (Service Provider)

-  Dashboard
-  Welcome
-  Calendar
-  Manage ▼
-  Time settings ▼
-  Reports ▼
-  Custom Features ▼
-  Settings
-  Marketing Suite
-  Plans & Prices ▼
-  Live help ?






General settings

- Configuration >
- Email and SMS settings >
- Custom wording & translations >
- System users >
- Clients >



Company information

- Basic information >
- Opening hours >
- Company special days >
- Directory listing >
- Delete account >



Booking Website Design

- Themes & colors >
- Home page >
- Calendar layout >
- Custom CSS >



Services

- Services >
- Working hours >
- Special workday settings >



Service providers

- Service providers >
- Working hours >
- Special workday settings >



Bookings on Webpage or Facebook

- Booking widget for your own website >
- Booking button widget for your website >
- Booking and contact button for your website >

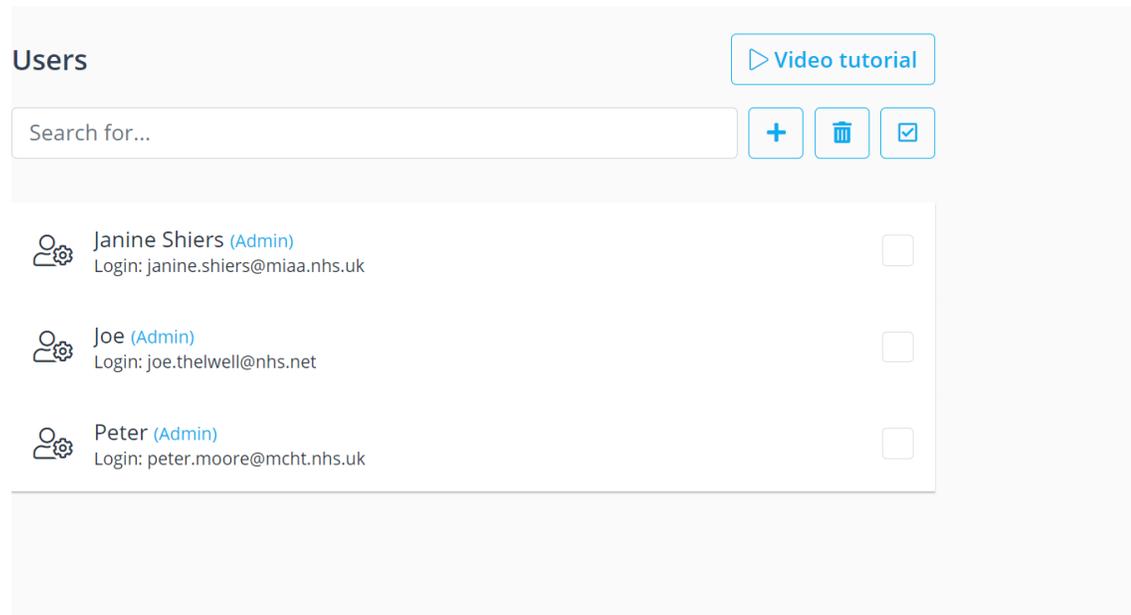


Placeholder

Job Roles

	Doorman	POS	Administrator
Validation of Bookings	✓	✓	✓
Amending Bookings		✓	✓
Creating Second Appointments		✓	✓
System Administration (set up, changes, new users, training)			✓
Data Reports			✓
Dashboard Reports			✓
Google Authenticator – enhanced security		✓	✓

Creating a New User [Manage>Users]



- To add a new user click on the + icon
- On the right-hand side enter the users details
- Select the appropriate job role:
 - Doorman
 - POS
 - Admin (**note admin users cannot be deleted**)
- Complete all mandatory fields (*)
- Enable 'Send Login Information to user'
- Click on 'Save and Close'

Creating a New User – Google Authenticator

[Manage>Users]

Google Authenticator Cancel Save & Close

You can use Code Generator in your mobile app to reset your password or to generate login codes. Set up a third party app to generate codes.

To configure the Google authenticator, you need to complete just a few steps:

1. Install Google Authenticator App from
[Google Play](#) or [App Store](#)

Important! If you lose your mobile device and along with it the code generator, you won't be able to log in to your account anymore. In this case you can contact the support to restore the access after verification process. Please add the recovery phone number you'd like to use to confirm your identity in user details.

2. Open Google Authenticator App on your phone.
3. To get a third party app working, either scan the QR code below or type the secret key into the app.
QR code  Secret key
DGKVKPGDCWNLKUM
4. To confirm the third party app is set up correctly, enter the security code that appears on your phone.
Security code *

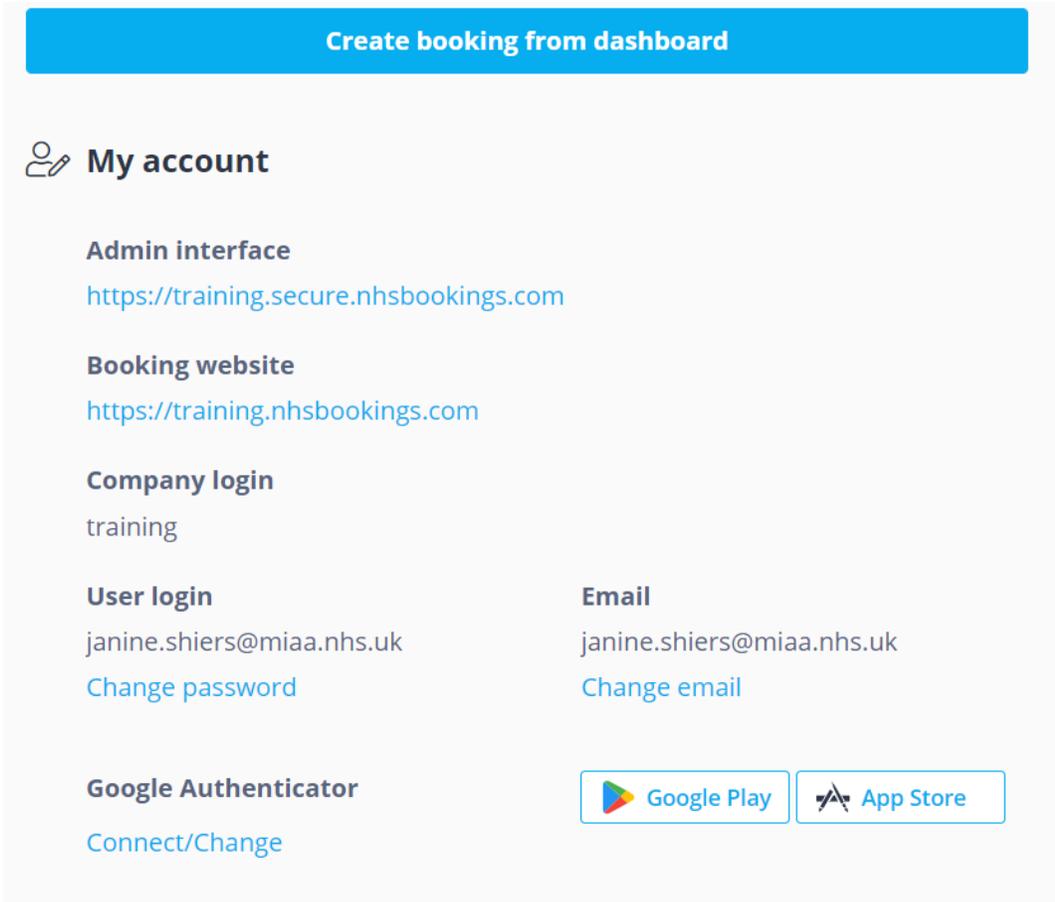
Connect

Cancel Save & Close

- If a user is able to access PID (**POS or Admin**). Google Authenticator (GA) will need to be added.
- To add GA, with the user present, ask them to scan the QR code into their GA account.
- This produce a unique 6 digit code every 30 seconds. They need to keep this GA account in order to access their account each time they log in.

Creating a New User – Google Authenticator

[Manage>Users]



Create booking from dashboard

My account

Admin interface
<https://training.secure.nhsbookings.com>

Booking website
<https://training.nhsbookings.com>

Company login
training

User login
janine.shiers@miaa.nhs.uk
[Change password](#)

Email
janine.shiers@miaa.nhs.uk
[Change email](#)

Google Authenticator
[Connect/Change](#)

[Google Play](#) [App Store](#)

- If a user is not present during the account set up, they must add this themselves as soon as possible after they access the account for the first time.
- To self-add, after accessing their account. They should click on Connect/ Change GA from the welcome page, and scan the QR code into their mobile device.
- The next time they log in, they will need to use GA to gain access.

User Management – Password Reset/ Resend log in links

[Manage>Users]

janine.shiers@miaa.nhs.uk

User details
janine.shiers@miaa.nhs.uk

① Email *

janine.shiers@miaa.nhs.uk

① Login *

janine.shiers@miaa.nhs.uk

① Group *

Admin

[Show roles description](#)

[Change password](#)

① Connected service provider

Select service provider

① Phone

 User phone

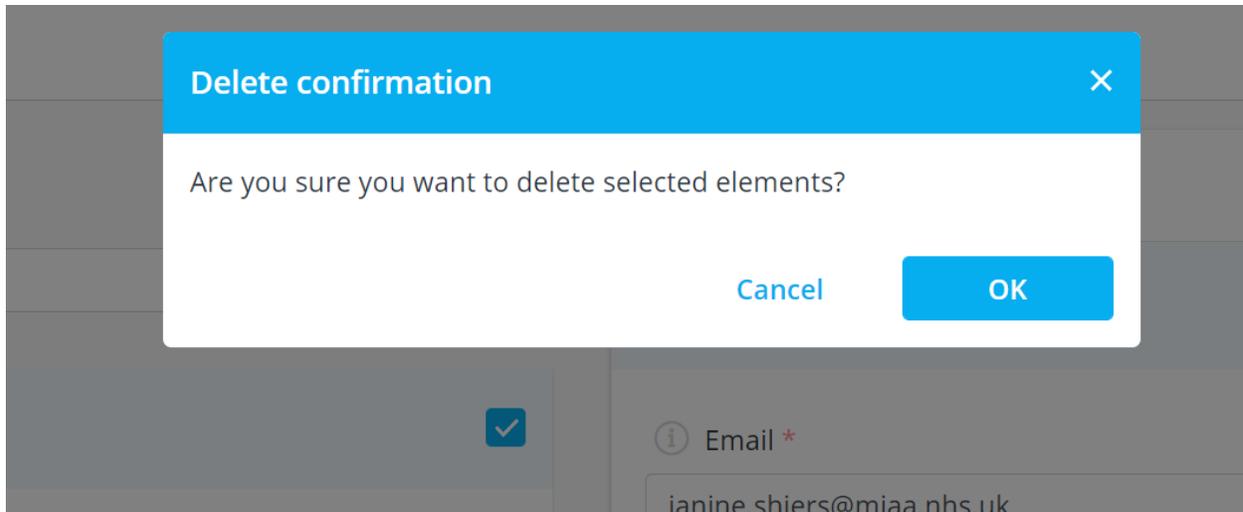
① First name *

Janine

- Click on the user account
 - On the right-hand side enter the users details will appear
1. To reset their password:
 - Click on change password
 - Enter a new password.
 - Enable 'send login information to user'
 - Click on 'Save and Close'
 2. To resend login link:
 - Enable 'send login information to user'
 - Click on 'Save and Close'
 3. To change a users access level (**admin cannot be downgraded in access**):
 - Change their user 'Group'
 - Click on 'Save and Close'

User Management – Account Deletion

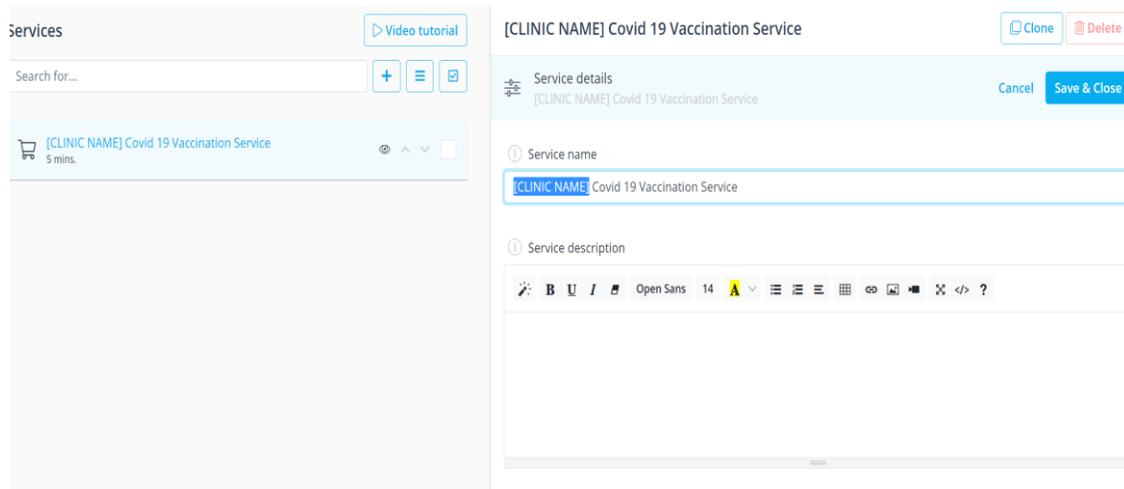
[Manage>Users]



- Check the box for the user account to be deleted
- Click on the bin icon to delete
- Select 'Yes' to pop up message

Admin users cannot be deleted. To remove their access, change the password on the account and (same process as password reset) do not inform them of change

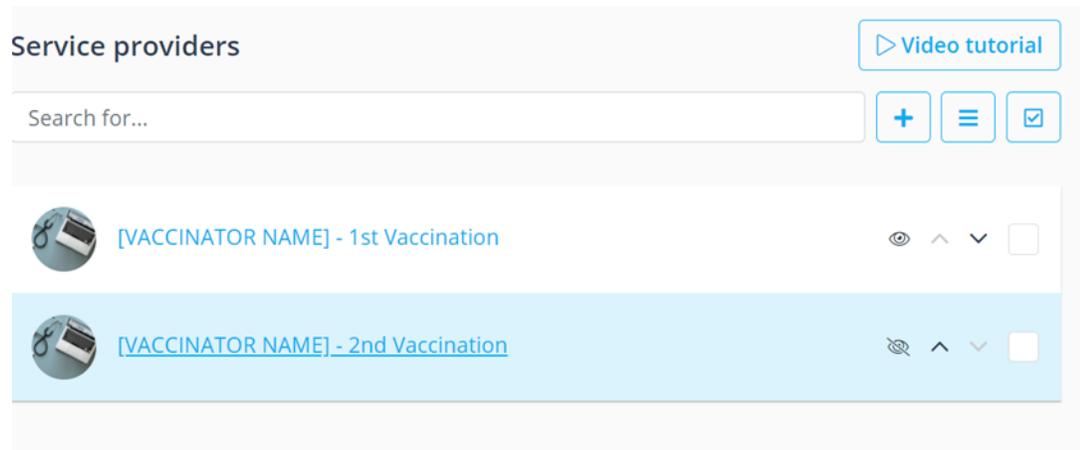
Amending the 'Service' name [Manage>Services]



- Each clinic will have a **ONE** service attached to them.
- Ensure the Service is visible on the booking page (eye must be open)
- To amend the Service Name, click on the 'Service'
- This will bring up a table on the right hand-side of the screen.

NOTE – this is the name which appears on the booking site for users AND also appear on the booking ticket

Amending a Vaccination Lane (Service Provider) – Amend the name [Manage>Service Providers]



- Each clinic will have a two Service Providers PER Vaccinator – **one for each vaccination event.**
 - 1st Vaccination lanes should be visible to the website (eye open)
 - 2nd Vaccination lanes should be hidden from the website (eye closed)
- You can amend the default Service Name, click on the ‘Service Provider’
- This will bring up a table on the right hand-side of the screen.

Amending a Vaccination Lane (Service Provider) – Amend the name [Manage>Service Providers]

[VACCINATOR NAME] - 1st Vaccination Clone Delete

Service provider's details
[VACCINATOR NAME] - 1st Vaccination Cancel Save & Close

[VACCINATOR NAME] - 1st Vaccination

[VACCINATOR NAME] - 1st Vaccination

- Click on the ‘Service provider name’
- Amend the name – ensure you retain the 1st/2nd Vaccination
- Save & Close

Amending a Vaccination Lane (Service Provider) – Operational Times

[Manage>Service Providers]

Service provider schedule

Cancel Save & Close

Please note that schedule changes will be applied automatically to previously saved service providers, regardless of "Save&Close" button

Do you want to set provider's schedule on special days only?

Configure your week settings here. Just move the sliders and add/remove breaktimes to set up working hours.

02:00 06:00 10:00 14:00 18:00 22:00

Mon 08:00 18:00 Add breaktime

Tue 08:00 11:40 14:10 18:00

Wed 08:00 18:00

Thu 08:00 18:00

Fri 08:00 18:00

- Click on the vaccination lane you want to edit
- Service provider schedule – this allows you to amend the time users can book into a service
- To amend the start or end of day, use the slider function.
- To add a break, hover over the || icon until 'add a break time appears, and then right click.
- This will allow a separation in the bar to accommodate a break period.

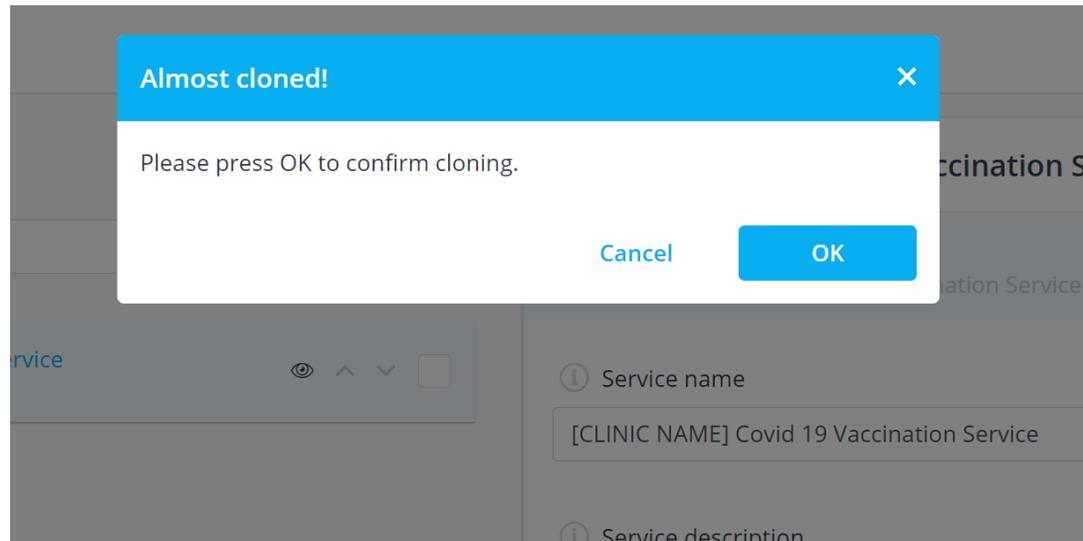
NOTE: Appointment slots are set for 10 mins to account. Breaks need to be made to start and finish at 00/10/20/30/40/50 on the hour

REMEMBER THIS EACH VACCINATION LANE REPRESENTS 50% CAPACITY OF A VACCINATOR. CHANGES TO ONE VACCINATION LANE MUST BE REPLICATED IN THEIR SECOND VACCINATION LANE

Adding Additional Vaccination Lanes (Service Provider) [Manage>Service Providers]

- The account has been set up with 2 vaccination calendars PER vaccinator, each with 50% capacity.
- When amending one vaccination lane, you must duplicate the change in the second

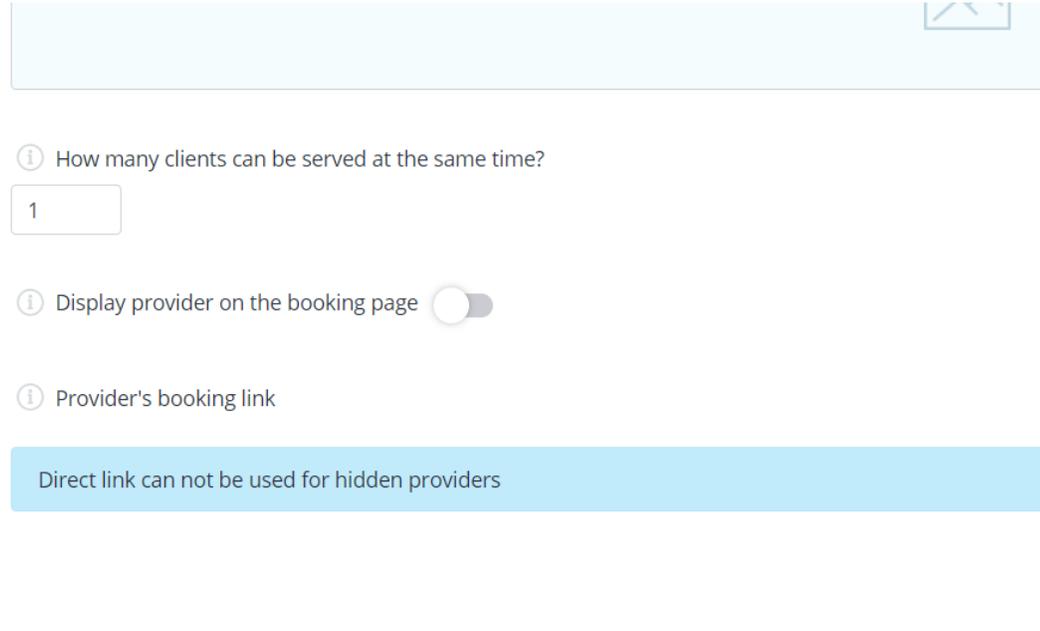
Adding Additional Vaccination Lanes (Service Provider) [Manage>Service Providers]



- To add additional vaccination lanes, the easiest way is to clone an existing one.
- Click on the service provider you are looking to clone, and then on the right-hand side of the screen click 'Clone'
- Click on 'Ok' when the pop-up appears.

Adding Additional Vaccination Lanes (Service Provider)

[Manage>Service Providers]



How many clients can be served at the same time?

Display provider on the booking page

Provider's booking link

Direct link can not be used for hidden providers

- Amend the name (click Service provider's details)– ensure you retain the 1st/2nd Vaccination
- Scroll down to **‘Display provider on the booking page’** set status:
 - enable for 1st vaccinations, or
 - disable for 2nd vaccinations)
- When asked ‘how many clients can be served at the same time?’, enter **‘1’**.

Adding Additional Vaccination Lanes (Service Provider)

[Manage>Service Providers]

(A Clone) [Vaccinator Name 2] - 2nd Vaccination Clone Delete

Service provider's details
(A Clone) [Vaccinator Name 2] - 2nd Vaccination

Service provider schedule

Services, attached to this service provider Cancel Save & Close

Services

Search for...

[CLINIC NAME] Covid 19 1st Vaccination Service

Cancel Save & Close

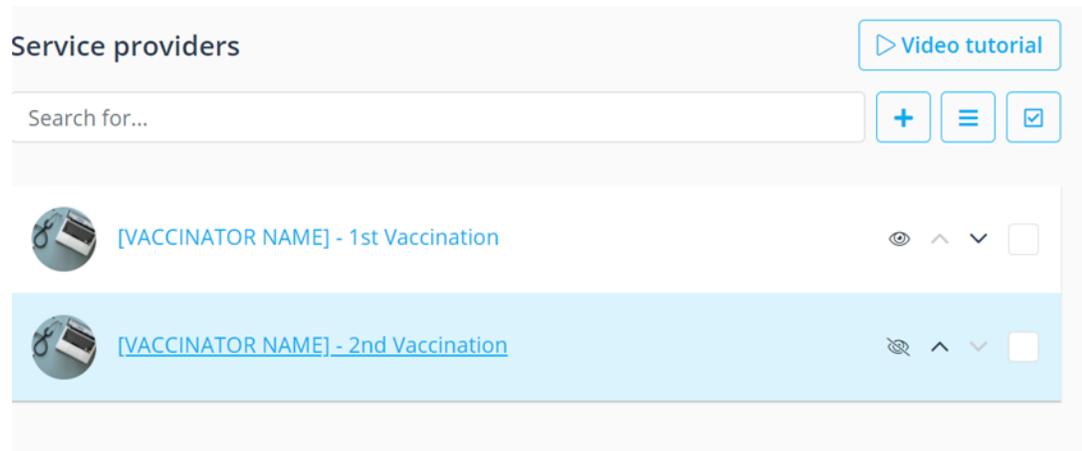
Service provider's locations

More options

- Edit the vaccination lane working hours – including breaks – using **‘Service provider schedule’**
- Assign the service provider to a service: **‘Services, attached to this service provider’** – **ENSURE THIS BOX IS CHECKED**, there will only be one service.
- **Save & Close**
- This will need to be carried out in duplicate.

Deleting a Vaccination Lane (Service Provider)

[Manage>Service Providers]



- There are two vaccination lanes (service providers) **per vaccination event**.
- Before deleting – need to check that there is not a booking assigned to the calendar for that service provider. If there are, please move the booking first.
- Check the box for both the service providers associated to the vaccinator.
- Select the icon with three lines, and select 'Delete'

Day 1

Managing the clinic system

1. Viewing the calendar
2. Validating a ticket
3. Making a follow-up appointment (including printing of booking tickets)
4. Dealing with 'walk-ins'
5. Amending a booking
6. Cancelling a booking
7. Data Reports
8. Dashboard Reports

SIMPLIFIED process flow for Vaccine clinic "On the Day"



Simply Book &
NIMS App

Covid-19 Vaccines

Mid Cheshire Hospitals
NHS Foundation Trust

User Books an Appointment

User arrives at Vaccine Clinic with;
• NHS number and
• Booking Ticket

User holds up the
booking ticket for the
Doorman.

Clinic
Doorman
(Simply
Book)

Doorman;
1. Checks date & time on ticket.
2. Scans the ticket into Simply Book system.
3. User retains ticket.

User gives Vaccinator;
• NHS number
• Date of Birth

Clinic
Vaccinator
(NIMS App)

Vaccinator;
1. Checks patient info.
2. Asks safety questions (any symptoms
etc.).
3. Administers & records Vaccine.
4. Updates the NIMS App system.

User shows the
booking ticket the to
POS.

Clinic
POS
(Simply
Book)

POS;
1. Checks ticket has been validated.
2. Creates 2nd vaccination booking (for 21/28
days from now, preferably at the same
time of day).
3. System sends 2nd booking email & Ticket
to Patient /Staff.

End of 1st appointment



Booking Ticket

NHS

Cheshire And Merseyside Treatment Centre Covid 19 Vaccination Service

Appointment details → **28-11-2020 11:50 - 11:55**

Booking code → **007119527c427**

NHS Number barcode - POC → **Booking number QR code - Simplybook**

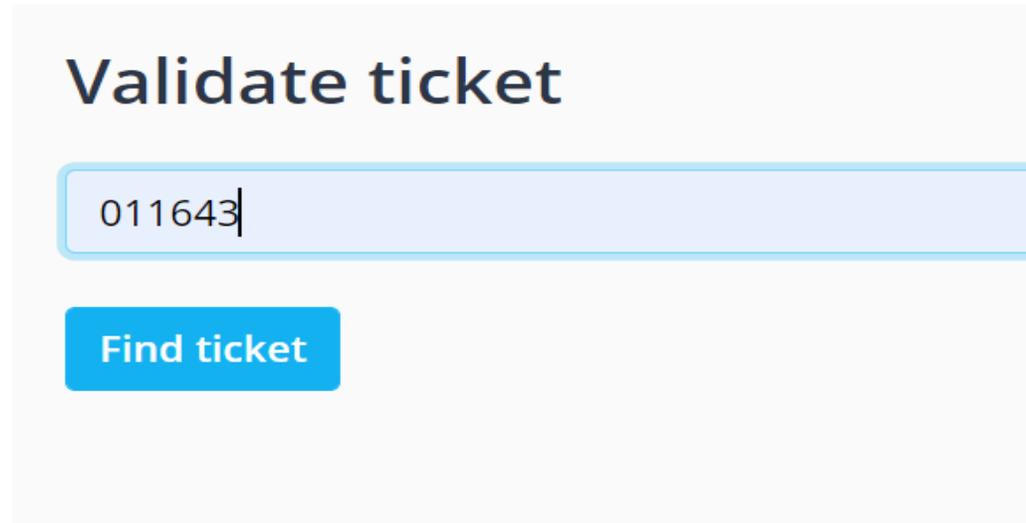
1566948606

Cheshire And Merseyside
Treatment Centre Covid 19
Vaccination Service
28-11-2020 11:50
007119527c427



Validating a Ticket

[Calendar>Validate Ticket]



Validate ticket

Find ticket

- On arrival into clinic, the user presents their booking ticket to the **Doorman**, who scans their QR code.
- If not using the mobile app and need to validate the ticket without scanning, On the calendar screen > click on **'Validate ticket'**.
- Enter the booking code or ticket number.
- Click **'Find Ticket'**
- Click **'Validate'**

If the user does not have their booking code then return to the calendar screen and locate their entry on the calendar. Highlight and copy their booking number and repeat the first step.

SIMPLIFIED process flow for Vaccine clinic "On the Day"



Simply Book &
NIMS App

Covid-19 Vaccines

Mid Cheshire Hospitals
NHS Foundation Trust

User Books

User arrives at Vaccine Clinic with;
• NHS number and
• Booking Ticket

Clinic
Doorman
(Simply
Book)

User holds up the
booking ticket for the
Doorman.

Doorman;
1. Checks date & time on ticket.
2. Scans the ticket into Simply Book system.
3. User retains ticket.

Clinic
Vaccinator
(NIMS App)

User gives Vaccinator;
• NHS number
• Date of Birth

Vaccinator;
1. Checks patient info.
2. Asks safety questions (any symptoms
etc.).
3. Administers & records Vaccine.
4. Updates the NIMS App system.

Clinic
POS
(Simply
Book)

User shows the
booking ticket the to
POS.

POS;
1. Checks ticket has been validated.
2. Creates 2nd vaccination booking (for 21/28
days from now, preferably at the same
time of day).
3. System sends 2nd booking email & Ticket
to Patient /Staff.

End of 1st appointment



Making a follow up appointment in Clinic

[Calendar>Validate Ticket]

- Once a user has received their first vaccination they will need another appointment making by the clinic team.
- Before a new booking is made, first check their current appointment has been validated.

Making a follow up appointment in Clinic - Ticket Validation Status

[Calendar>Validate Ticket]

Validate ticket

Find ticket

- On the calendar screen > click on **'Validate ticket'**.
- Enter the booking code or ticket number.
- Click **'Find Ticket'**

If the user does not have their booking code then return to the calendar screen and locate their entry on the calendar. Highlight and copy their booking number and repeat the first step.

Making a follow up appointment in Clinic - Ticket Validation Status

[Calendar>Validate Ticket]

The Royal Liverpool Hospital - Covid 19 Vaccination Service

 Booking status: confirmed

 Date: 20-11-2020 08:40 AM

 Provider: The Royal Liverpool Hospital - 1st Vaccination (2)

 Ticked code: 00412fbd79900

 [View booking](#)

[Validate ticket](#)

The Royal Liverpool Hospital - Covid 19 Vaccination Service

 [View booking](#)

 Booking status: confirmed

 Date: 20-11-2020 08:40 AM

 Provider: The Royal Liverpool Hospital - 1st Vaccination (2)

 Ticked code: 00412fbd79900

 Validated: 26-11-2020 01:34 AM

- If a ticket has not be validated:
 - A blue box with ‘Validate’ will be visible
- Click ‘**Validate Ticket**’
- Click on ‘**Find Ticket**’ and the entry will update to include a validated date and time, and the blue ‘**validate ticket**’ box will no longer be visible.

Making a follow up appointment in Clinic

[Calendar>Validate Ticket]

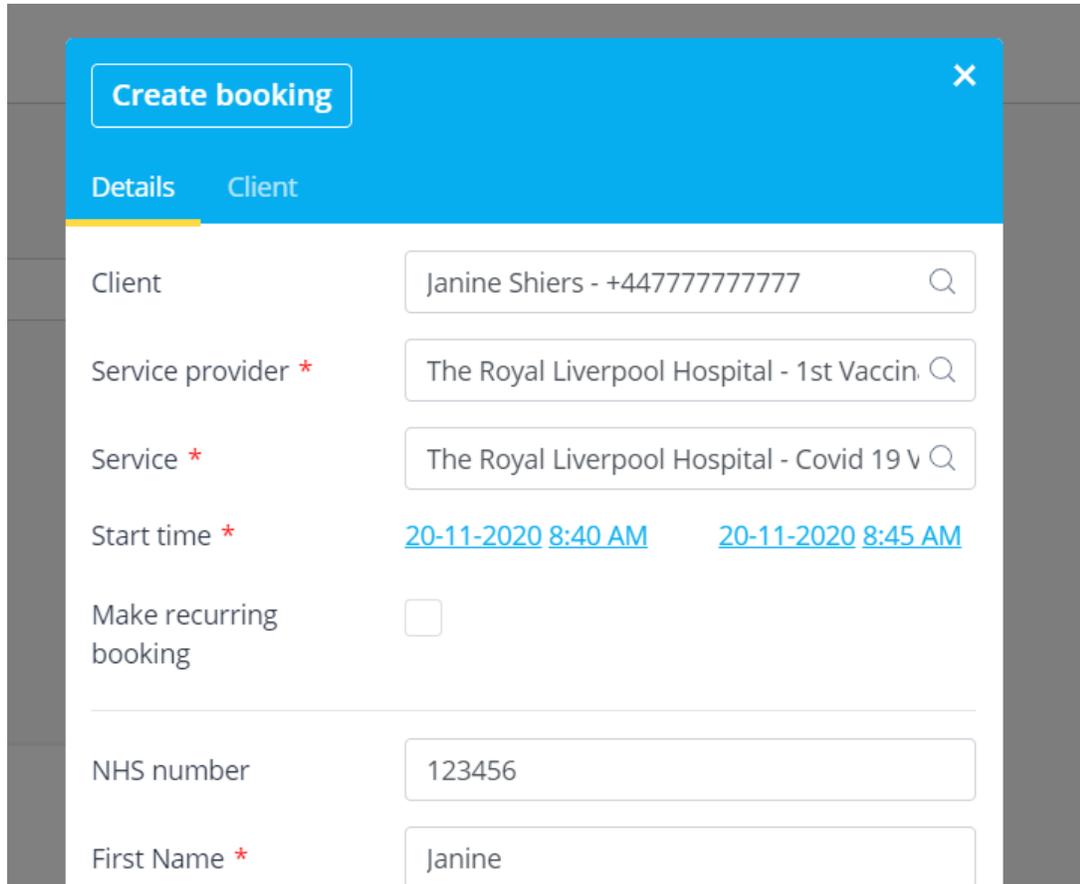
Ethnicity	White
Nationality	British
Home Postcode	CH63
Home Address	1 The House
Covid Vaccine Types [AUTOFILL FROM NIMS]	10112221212
Chosen Covid Vaccine Type	10112221212
Most Recent Flu Vaccine Administered Date [AUTOFILL FROM NIMS]	02-11-2020
Most Recent Flu Vaccine Administered Date [AUTOFILL FROM NIMS]	07-11-2020
Most Recent Covid vaccine Dose 1 Administered Date [AUTOFILL FROM NIMS]	30-11-2020
Most Recent Covid vaccine Dose 2 Administered Date [AUTOFILL FROM NIMS]	02-11-2020

Status

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- Once a user has received their first vaccination they will need another appointment making by the clinic team.
- To do this, first check their first appointment has been validated.
- Click on the **‘View Booking’** from the bottom of the validate ticket screen.
- Click **‘Rebook’**

Making a follow up appointment in Clinic [Calendar>Validate Ticket]



The screenshot shows a 'Create booking' form with a blue header and a close button (X). The form is divided into two tabs: 'Details' (selected) and 'Client'. The 'Details' tab contains the following fields:

- Client: Janine Shiers - +447777777777
- Service provider *: The Royal Liverpool Hospital - 1st Vaccin.
- Service *: The Royal Liverpool Hospital - Covid 19 v
- Start time *: 20-11-2020 8:40 AM and 20-11-2020 8:45 AM
- Make recurring booking:
- NHS number: 123456
- First Name *: Janine

- Select a service provider for **2nd vaccinations**
- Select the appropriate date for the second booking.
- Select a start time (tip: it is probably best to use the same time slot)
- Click **'Save'**
- User should receive an email with their booking details and ticket.

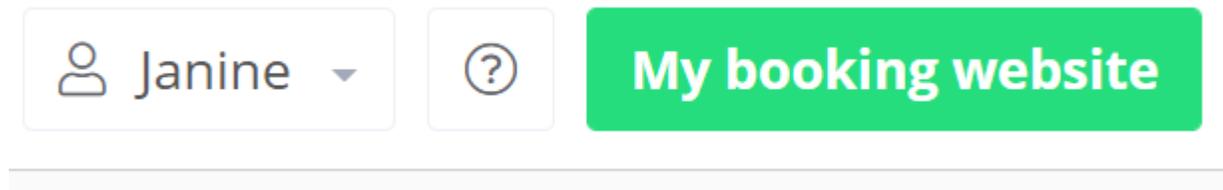
Printing a booking for users without email address [Report>Tickets Report]

Ticket code	Service	Client name	Date start	Created	Validated	Actions
<input type="text" value="00412t1z"/>	<input type="text"/>	<input type="text"/>	from <input type="text"/> to <input type="text"/>	from <input type="text"/> to <input type="text"/>	<input type="text"/>	<input type="button" value="Clear"/> <input type="button" value="Apply"/>
00413b2484594	The Royal Liverpool Hospital - Covid 19 Vaccination Service	Janine Shiers janine.shiers@miaa.nhs.uk +447777777777	30-12-2020 8:40 AM — 8:45 AM	26-11-2020 1:56 AM	Not validated	<input type="button" value="print"/> <input type="button" value="view booking"/> <input type="button" value="resend ticket to client"/>
00412fbd79900	The Royal Liverpool Hospital - Covid 19 Vaccination Service	Janine Shiers janine.shiers@miaa.nhs.uk +447777777777	20-11-2020 8:40 AM — 8:45 AM	20-11-2020 8:34 AM	Validated 26-11-2020 1:34 AM	<input type="button" value="print"/> <input type="button" value="view booking"/>

- Go to **Report>Ticket Report**
- Enter the code for the new booking and **'apply'** or change the date range to the future appointment date and find user in the list.
- Select **'Print'**

Walk-Ins

- It is not possible to have walk-in appointments as the users details needs to be downloaded from the NIMS database on to the booking system.
- In order to fill calendar gaps, it is possible for a user to be booked into the system, via the website, provided they know their NHS Number. To book: click on the '**My Booking Website**'



- Found in the top right hand corner, and complete as usual for first time attendees. This will bring the additional information required for the booking from the NIMS database.

Amending an appointment

- In the event a clinic needs to amend a booked appointment, it will be the responsibility of the team to notify the user that a change of date/ and or time has happened.
- Amending a booking does not change their booking ticket number, and the original ticket is still valid.

Amending an appointment –option 1

[Calendar>Validate Ticket]

The Royal Liverpool Hospital - Covid 19 Vaccination Service

 [View booking](#)

 Booking status: confirmed

 Date: 20-11-2020 08:40 AM

 Provider: The Royal Liverpool Hospital - 1st Vaccination (2)

 Ticked code: 00412fbd79900

[Validate ticket](#)

- To cancel an appointment. Go to **‘validate ticket’** on the calendar page
- Enter the booking code and click **‘Find Booking’**
- When the booking details pop up at the bottom of the screen – select **‘View booking’**

Amending an appointment – Option 1

[Calendar>Validate Ticket]

Create booking ✕

Details Client

Client Janine Shiers - +447777777777

Service provider * The Royal Liverpool Hospital - 1st Vaccin.

Service * The Royal Liverpool Hospital - Covid 19 v

Start time * [20-11-2020 8:40 AM](#) [20-11-2020 8:45 AM](#)

Make recurring booking

NHS number 123456

First Name * Janine

- Click on **'Edit Booking'**
- Make the changes required (date/time/service provider).
- Click **'Save'**

Amending an appointment –option 2 [Calendar>Validate Ticket]



- Find the appointment on the calendar that need to be moved.
- Hoover cursor over the booking to bring up some details to check it is the right one.
- Click on the booking, and keeping the left mouse button depressed, drag the appointment to a new available time/date slot
- When asked if you want to change the booking, click 'Yes'

Cancelling an Appointment

- It may be necessary to cancel booked appointments, either at the request of a user, or if a booked appointment cannot be moved to an alternative date.
- The user will be sent a notification by the system by email of this cancellation (you may want to consider the wording of the email notification before sending large numbers).

Day to Day – Cancel an appointment [Calendar>Validate Ticket]

The Royal Liverpool Hospital - Covid 19 Vaccination Service

 [View booking](#)

 Booking status: confirmed

 Date: 20-11-2020 08:40 AM

 Provider: The Royal Liverpool Hospital - 1st Vaccination (2)

 Ticked code: 00412fbd79900

[Validate ticket](#)

- To cancel an appointment. Go to **'validate ticket'** on the calendar page
- Enter the booking code and click **'Find Booking'**
- When the booking details pop up at the bottom of the screen – select **'View booking'**

Day to Day – Cancel an appointment

[Calendar>Validate Ticket]

Ethnicity	White
Nationality	British
Home Postcode	CH63
Home Address	1 The House
Covid Vaccine Types [AUTOFILL FROM NIMS]	10112221212
Chosen Covid Vaccine Type	10112221212
Most Recent Flu Vaccine Administered Date [AUTOFILL FROM NIMS]	02-11-2020
Most Recent Flu Vaccine Administered Date [AUTOFILL FROM NIMS]	07-11-2020
Most Recent Covid vaccine Dose 1 Administered Date [AUTOFILL FROM NIMS]	30-11-2020
Most Recent Covid vaccine Dose 2 Administered Date [AUTOFILL FROM NIMS]	02-11-2020

Status

[Close](#) [Cancel booking](#) [Edit](#) [Rebook](#) [Clients](#)

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- Click on **‘Cancel Booking’**
- The user will be sent a cancellation message via email.

Data Reports

[Report>Booking Report]

The following reports are required:

1. To assign a Covid 19 Vaccine Type to 1st Vaccination Appointments – Daily – this is to aide with clinical planning.
2. Seasonal Flu Date Check – Daily – check to ensure that an appointments for Covid 19 vaccination is not set to take place within 7 days of the user receiving a Seasonal Flu Vaccination.
3. Reconciliation Report to monitor the service – DNA/Cancellations/Bookings

Data Reports

[Report>Booking Report]

Booking details

Show/hide filter

Export to excel

Send SMS (text messages)

Send E-mail



Code

Created

Date

Service

Service provider

Client

Status

Actions

Code

from



from



Show all bookings



Clear

Apply

to



to



No results found

Data Reports

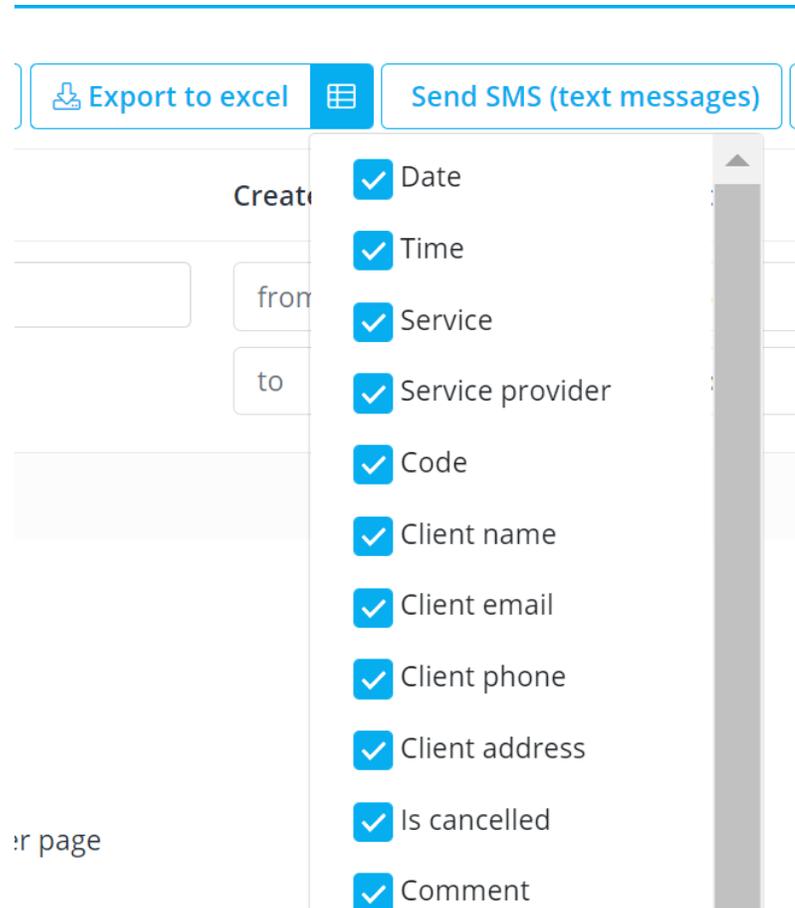
[Report>Booking Report]

Date	Status	Actions
<input type="text" value="from"/> 	<input type="text" value="Show all bookings"/> 	<input type="button" value="Clear"/> <input type="button" value="Apply"/>
<input type="text" value="to"/> 		

- Enter the date range of interest into the **'Date'** field,
 - From and To, using the calendar feature
- Set the **'Status'**
- Actions –click **'Apply'**

Data Reports

[Report>Booking Report]



The screenshot shows a software interface for generating reports. At the top, there are two buttons: 'Export to excel' (with a download icon) and 'Send SMS (text messages)'. Below these buttons, there is a dropdown menu that is currently open, displaying a list of data fields. Each field has a blue checkmark to its left, indicating it is selected for export. The fields listed are: Date, Time, Service, Service provider, Code, Client name, Client email, Client phone, Client address, Is cancelled, and Comment. To the left of the dropdown menu, there are input fields for 'Create from' and 'to', and a 'Create' button. At the bottom left, there is a label 'r page'.

- Click the menu box next to **'Export to excel'**
- Check all the boxes that apply
- Click **'Export to excel'**

Dashboard Reports

[Report>Booking Report]

The dashboard features a dark sidebar on the left with navigation options: Dashboard, Welcome, Calendar, Manage, Time settings, Reports, Custom Features, Settings, Marketing Suite, Plans & Prices, and Live help. The main content area is divided into several sections:

- Bookings today:** 0 bookings (0% growth) for 26-11-2020. Includes a 'View >' link.
- Bookings this week:** 0 bookings (0% growth) for 23-11-2020 - 29-11-2020. Includes a 'View >' link.
- Workload this week:** 0h workload (0% growth) for 23-11-2020 - 29-11-2020.
- Revenues this week:** A green box with the text 'Please activate Accept payments custom feature' and an 'Activate' button.
- Visits previous week:** 0 visits (0% growth) for 23-11-2020 - 29-11-2020. Includes metrics for Visits Growth (0%), Bookings Per Visit (0%), and Booking Per Visit Growth (0%).
- Your current tariff is: Free:** A blue box with details: Valid Until: 08-12-2020, Days Left: 12, SMS Credits Left: 0, Bookings Left: 24368, and Custom Features Left: ∞. Includes a 'change >' link.
- Upcoming bookings:** A table with columns for Date, Service duration, Service name, and Client. The table is currently empty, with the text 'List of your upcoming booking will be presented here' and a 'Show all bookings >' link at the bottom right.

At the bottom of the dashboard, there is a 'Filter' section with a calendar icon and the text 'Set data filters for period to the insights below' and 'Set default'. To the right, there are tabs for 'Day', 'Week', 'Month', 'Year', and 'Date range', with 'Week' selected. Below the tabs, the filter period is set to '23-11-2020 - 29-11-2020'. A status message indicates 'Filters applied' and 'Filters applied to the insights below. Period 23-11-2020 - 29-11-2020'.

Dashboard Reports

[Report>Booking Report]

- The dashboard can be used to provide illustrative breakdown of the number of bookings, and cancellations
- The dashboard should be used to monitor the Number of Tickets on the account (these are needed to allow bookings to take place, and to validate the booking on arrival). **Your service may not work effectively without a supply**
- When additional tickets are required Administrators should notify

JBS.enquiry@miaa.nhs.uk