



Scheduling Software for
the Internet Age

Document Upload Module

Version 1.0



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Overview

The Document Upload Module allows you or your customers to upload documents into the system. This allows you to save key documents and have them linked to a customer's profile for access and review at any time.

There are 3 ways to use the Document Upload Module:

1. Upload documents for customers via Site Administration.
2. Allow customers to upload documents themselves via the Customer View.
3. Upload internal documents that can then be attached to email notifications.

Examples of how the module can be used include:

Customers filling out forms prior to their appointment

In many situations, such as with massage therapy, new clients are required to fill out intake forms. Many other professions also require some initial documentation for customers. With the Document Upload Module, you can have your customers upload their document while they are making their appointment. The document can then be accessed via the customer's profile or when viewing their appointment.

Customers uploading a document for review

Some writing centers and tutoring companies have their students submit papers to be reviewed during the appointment session. By having students upload papers when making their appointment, it ensures the paper is associated with the appointment and saved in the system. Staff members can then access and download the paper for review at their convenience.

Organizing customer documentation

By uploading key customer documentation, it allows you keep all important forms in one place and ensure that they don't get lost. You can access all documents associated with a customer at any time.

Sending documents via email notifications

In some cases, after a client has booked an appointment, companies will want to have that customer fill out some information to bring with them to the appointment. With the Document Upload Module, you can attach any document to any email. For example, you can attach a form to the Appointment Confirmation Email. When the customer sets an appointment and receives their confirmation email, it will include the form they need to fill out.



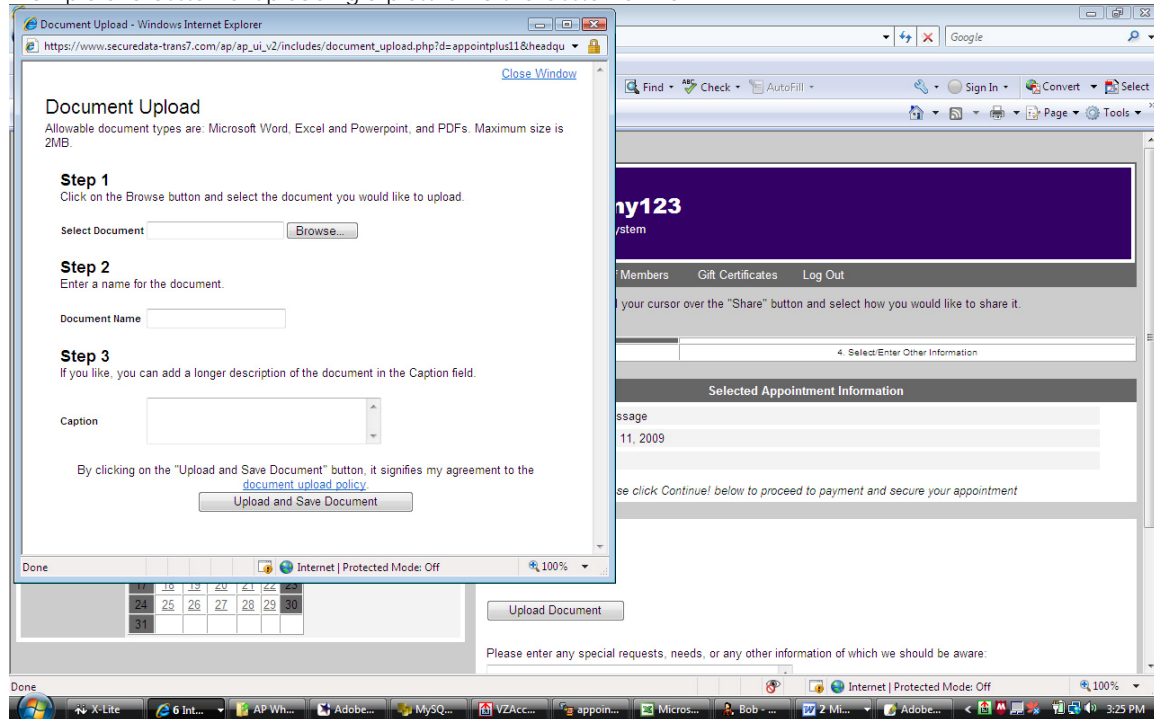
How Does It Work?

You can enable the Document Upload Module at any time via the Options link in the Company section of your account. Once you enable the module, you will be able to immediately begin uploading documents into the system. You will also have access to a set of preferences that will allow you to control how the module is used in your account, including whether or not to allow customers to upload documents.

Customers Uploading Documents

If you enable the ability for your customers to upload documents, they will be prompted to upload a document during the appointment setting process. An example of what the upload page looks like is below.

Example of a customer uploading a picture via the Customer View



You can also control the text that displays when the customer is prompted to upload a document. The text defaults to, "If you would like to upload a document, please click on the Document Upload button below."

You can edit this text via the Pages/Text tab in Site Administration.



Uploading Documents Via Site Administration

Internal staff can upload documents associated with customers through Site Administration. Uploading can be done via the Customers section of Site Administration, or you may upload a document while making an appointment or viewing an existing appointment. When you select a customer from the Customer drop down when making an appointment, the customer's name displays. Next to their name, you'll see a "documents" link.

When you click on the "documents" link, a window will display showing any existing documents you or your customer have uploaded. It will also allow you to upload additional documents.

Example of uploading a document while making an appointment for a customer.

The image consists of two side-by-side screenshots of the Appointment-Plus website's Site Administration interface. The left screenshot shows the 'Make Appointment' page for a customer named Robert Barnett. It includes a calendar for May 6, 2009, and a form to enter appointment details. The right screenshot shows the 'Documents' page for Robert Barnett, which displays a table of existing documents and an 'Add New Document' form.

Document Name	Description	Upload Date	Document (click to view)
Stats	Stats for ABC Co.	5/1/09	Edit Delete
Information Form	Full information form.	4/16/09	Edit Delete

Add New Document
 Allowable document types are: Microsoft Word, Excel and Powerpoint, and PDFs. Maximum size is 2MB.

Select Document: [Browse...](#)
 Document Name:
 Description:

[Upload and Save Document](#)

In that popup window, you are given the ability to do the following:

- View, change or edit any documents that have been uploaded for the customer
- Delete any uploaded documents
- Upload additional documents

When uploading documents, you can include a document name and caption. This helps to identify the document.

When you look up a customer and click on their name to access their information via the Customer Search page in the Customers tab, you will see a "Document Upload" link. When you click on that link, you will have the same options.



Pets or Children

Similar to customers, when you access the details of a pet or child via the Customer Search page or when making or viewing an appointment, you will be able to maintain documents of the pet or child in the same fashion as you would for customer documents.

Uploading Internal Documents

You can upload internal documents that you can then attach to any of the automatic emails sent by the system. You can also access these documents for viewing or downloading at any time.

To upload internal documents to the server, click on the Internal Documents link in the Company section of Site Administration.

Example of uploading an internal document.

The screenshot shows the Appointment-Plus Site Administration interface. The browser address bar displays the URL: https://www.appointment-plus1.com/ap/ap_admin_v2/appointments_index_v2.php?p=appts&first=yes. The interface includes a navigation menu with options like 'appointments', 'pos', 'time clock', 'customers', 'staff members', 'services', 'reports', and 'gift certificates'. The 'Internal Documents' section is active, showing a table of existing documents:

Document Name	Description	Upload Date	Document (click to view)
Post-Appointment Survey	Survey for all clients	5/6/09	Edit Delete
Client Intake Form	Client intake form	4/21/09	Edit Delete

Below the table, there is an 'Add New Document' section with the following text: 'Allowable document types are: Microsoft Word, Excel and Powerpoint, and PDFs. Maximum size is 2MB.' The form includes fields for 'Select Document' (with a 'Browse...' button), 'Document Name', and 'Description'. An 'Upload and Save Document' button is at the bottom of the form.



Attaching an Internal Document to an Email

To attach an internal document to an email, go into the Notifications section within the Company tab. Click on any of the notifications. At the bottom of the notification will be a section prompting you to attach one or more of your internal documents to the email.

When attached, the documents display in the email as clickable links. They are not sent as true attachments. This helps lessen the likelihood of emails being mistaken for spam.

Example of attaching a document to an email.

The screenshot shows the Appointment-Plus administration interface in a Windows Internet Explorer browser. The address bar shows the URL: https://www.appointment-plus1.com/ap/ap_admin_v2/appointments_index_v2.php?pe=appts&first=yes. The interface includes a navigation menu with tabs for 'appointments', 'pos', 'time clock', 'customers', 'staff members', 'services', 'reports', and 'gift certificates'. The 'company' tab is selected, and the 'notifications' section is active. The 'Paragraph 2' field contains the text: 'If you need to cancel or reschedule your appointment, you may do so through our Web site or give us a call.' The 'Closing' field contains 'Thanks!'. The 'From' field contains 'test 125'. The 'Documents to include in email' section has a checked box for 'Client Intake Form' and an unchecked box for 'Post-Appointment Survey'. An 'Update' button is visible at the bottom of the configuration area.

Example of email with document attached.

The screenshot shows an email notification from Appointment-Plus. The header information is as follows:

- From: Bob Jones [mailto:info@appointment-plus.com]
- To: bialgge@appointment-plus.com
- Co:
- Subject: Appointment Confirmation
- Attachments: cm_77325884.cs (647 B)

The email body contains the following text:

Dear Robert Barnett,
Thank you for making an appointment with us. You are confirmed for the following appointment:

Location: North Location 12
Service: 30 minute massage
Date: Wednesday, May 06, 2009
Time: 8:00am MST
PO Number:
Account Number: 1234v
SSN: 12345

If you need to cancel or reschedule your appointment, you may do so through our Web site or give us a call.

Thanks!
test 125

Client Intake Form
http://www.securedata-transf.com/ap/twe12_dcoe/20090421171960_C2.PDF



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Preferences

You can control key document upload settings to help ensure proper usage for your specific needs. The following are preferences you can control via the Document Upload section of Preferences section in Site Administration:

Customer Documents

- Allow Site Administration users to upload customer documents.
- Allow customers to upload documents.
- Limit the number of documents a customer can upload.
- Limit the number of documents that can be uploaded for a customer through Site Administration.

All

- Only allow Headquarters Administrators to delete documents.



Monitoring Documents

Whenever you allow customers or staff to upload documents, it's a good idea to monitor the documents that are being uploaded. The Appointment-Plus Document Upload Module allows you to view any documents uploaded to your account through the Document Monitor page. You can also edit or delete any document. This functionality is limited to Headquarters and Location Administrators.

On the Document Monitor page, you can search under any date. The page will list who uploaded the document, including whether it was uploaded by a staff member or a customer, and the date they uploaded it.

Example of the Document Monitor Page

The screenshot shows the Appointment-Plus web application interface. At the top, there's a navigation menu with tabs like 'appointments', 'pos', 'time clock', etc. The main content area is titled 'Document Monitor'. It features a search form with a 'Date' dropdown set to 'May 6 2009' and a 'Search' button. Below the search form are 'Previous Day' and 'Next Day' buttons. A table displays the search results:

Uploaded By	Upload Date	Document Name	Caption	Document (click to view)	
Jo (staff member)	5/6/09	Post-Appointment Survey	Survey for all clients		Edit Delete

The bottom of the page includes a footer with 'New Features | Let an answering service book your appointments' and 'Support Level: Premium | submit a question | review submitted questions | or call (480) 483-1199. After hours call (888)367-1413'.

