

# Appointly - WooCommerce Appointment Booking & Scheduler Plugin

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- by: Extendons
- [extendons.com/](https://extendons.com/)
- email: [info@extendons.com](mailto:info@extendons.com)

## 1 Installation Guide

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This is a quick guide on installation, and updating.

### 1.1 Plugin Installation

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To install WooCommerce Product plugin you must have a working and latest version of WordPress and WooCommerce plugin already installed. For information on installing the WordPress , please see the [WordPress Codex - Installing WordPress](#). For installing the WooCommerce and configure the shop please visit the following link [WooThemes - Installing WooCommerce](#).

- Now the next step is the **Appointly - WooCommerce Appointment Booking & Scheduler Plugin**. In the full .ZIP archive you have downloaded from Codecanyon.net. This file is the installable .ZIP archive you can install via WordPress.

Now is time to install **Appointly - WooCommerce Appointment Booking & Scheduler Plugin**, please read these steps carefully.

### Installing from WordPress

Follow the steps bellow to install from WordPress Admin Dashboard

- Navigate to Plugins
- Click Install Plugins and click Add New
- Click the Upload Plugin button
- Navigate the .ZIP on your computer and click Install Now
- When installation is done please click Activate to activate plugin

### Installing using FTP

Follow the steps bellow to install using FTP

- Unzip the provided .ZIP file to a desired location on your computer. These extracted files will be uploaded later via FTP
- Connect to your server via FTP (Use FileZilla or any other FTP client)
- Navigate to /wp-content/plugins/ server directory
- Locate the local directory where you have unzipped the archive
- Upload local folder to remote /wp-content/plugins/
- To activate the newly installed plugin navigate to Plugins and click the Activate button within the **Appointly - WooCommerce Appointment Booking & Scheduler Plugin**

## 1.2 Plugin Updates

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### Update from WordPress Admin

Follow the steps bellow to update from WordPress Admin Dashboard

- Navigate to Plugins
- Find the currently installed **Appointly - WooCommerce Appointment Booking & Scheduler Plugin** and click Deactivate
- After deactivation click Delete to remove the old version (your saved setting will not be lost)
- Click Install Plugins and click Add New
- Click the Upload Plugin button
- Navigate the new version archive .ZIP file on your computer and click Install Now
- When installation is done please click Activate to activate plugin

### Update using FTP

Follow the steps bellow to update using FTP

- Unzip the new version archive .ZIP file to a desired location on your computer. These extracted files will be uploaded later via FTP
- Connect to your server via FTP (Use FileZilla or any other FTP client)
- Navigate to /wp-content/plugins/ server directory and delete the current plugin folder
- Locate the local directory where you have unzipped the new version archive .ZIP file
- Upload local folder to remote /wp-content/plugins/

## 2 User Guide

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After installation of plugin, login to admin panel and flush your cache storage.

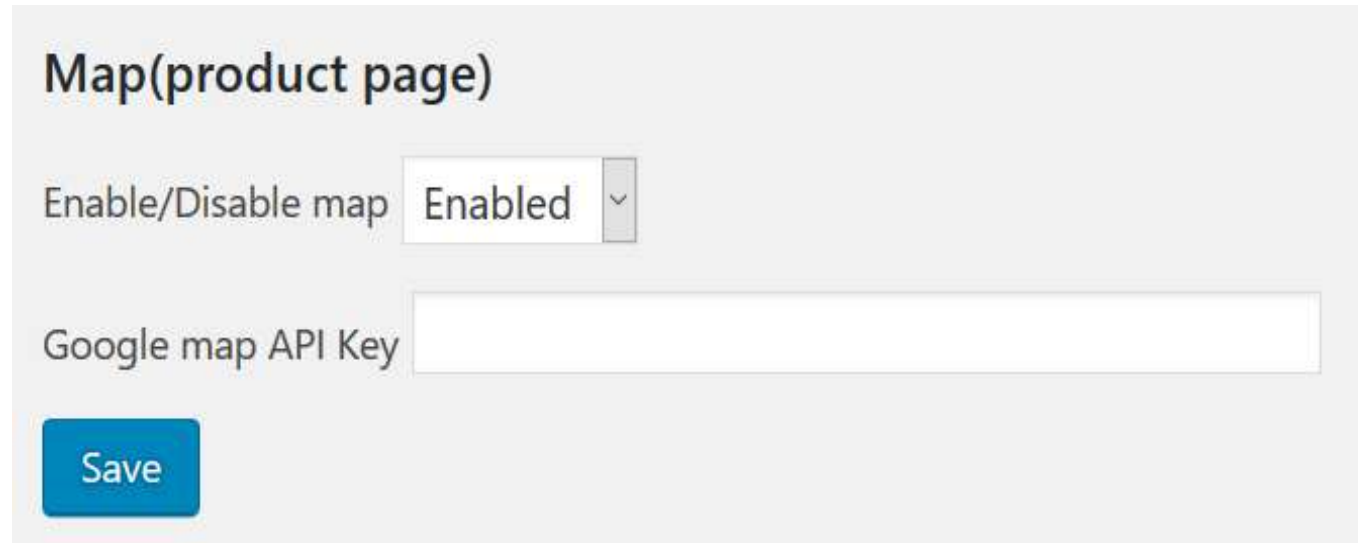
## 2.1 How to Configure the Plugin

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At the backend go to "Appointments > Settings". Here you will find the following:

### Map (Product Page)

- **Enable/Disable map**
- **Google map API Key**



Map(product page)

Enable/Disable map

Google map API Key

### Email Notifications Settings

- **Booking Notifications:** Enable/Disable email notifications
- **Sender Name**
- **Sender Email**

## Email Notifications Settings

Booking Notifications:  

Sender Name:

Sender Email:

### Calendar Appointments Colors

- **Pending Payment**
- **Processing**
- **Waiting**
- **On Hold**
- **Completed**
- **Cancelled**
- **Refunded**
- **Failed**

## Calendar Appointments colors

Pending payment:

Processing:

Waiting:

On hold:

Completed:

Cancelled:

Refunded:

Failed:

Save

### Waiting List

- **Waiting List Status:** Enable/Disable waiting list

# Waiting List

Waiting List Status: **Enabled**

Save

## 2.2 How to Add / Edit Appointable Product

### Step 1: Go to Add New at the Backend

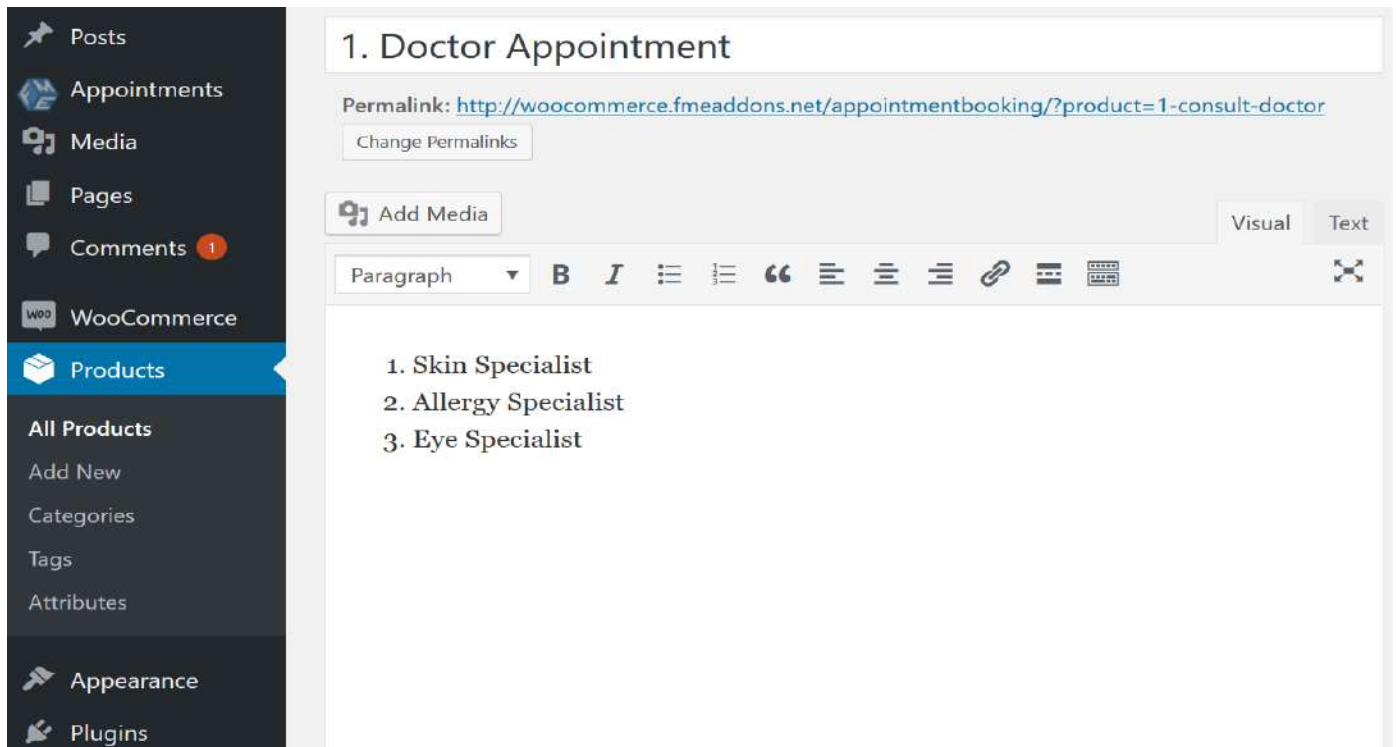
At the backend got to "Add New" at the backend. You can go there from the Products tab.

The screenshot displays the WordPress WooCommerce 'Products' management page. The left sidebar contains a navigation menu with 'Products' selected, and a pink arrow points to 'All Products'. The main content area shows a table of products with columns for Name, SKU, Stock, Price, Categories, Tags, and Date. Two products are visible: 'Premium Quality' and 'Woo Logo'. The 'Woo Logo' product is highlighted in blue. The interface includes navigation buttons like 'Add New', 'Import', and 'Export', and a search bar.

Name	SKU	Stock	Price	Categories	Tags	Date
Premium Quality	-	In stock	\$20.00	Clothing, T-shirts	-	Published 2013/06/07
Woo Logo	-	In stock (5)	\$20.00 \$18.00	Clothing, T-shirts	-	Published 2013/06/07

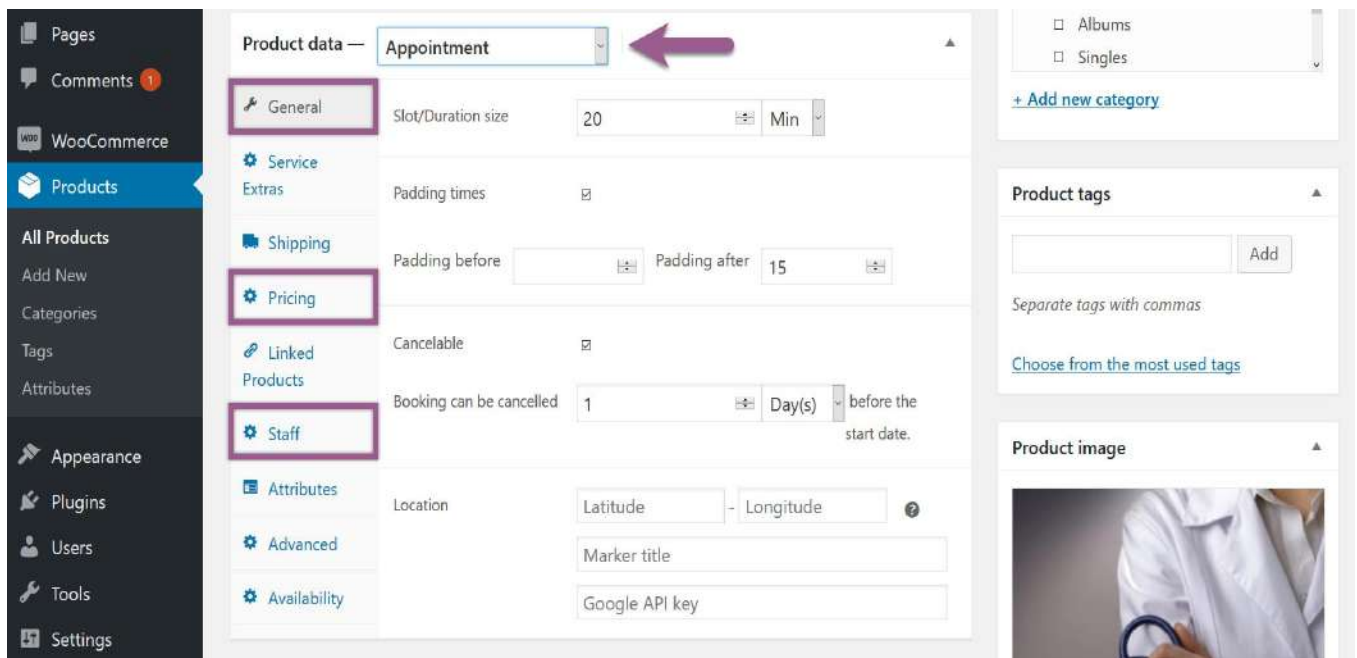
### Step 2: Fill Product Information

Fill your bookable products required information. For the purpose of the demo we have added the following.



### Step 3: Fill Appoinment Information

Scroll down and you will find Product data, choose "Appointment" there. Each tab highlighted will have appointment options. For the purpose of this demo we have added the following. Also we have assigned an image for the product as well.



## Step 4: Frontend

Now at the frontend we will find the following. You can always go back and edit this information.



### 1. Doctor Appointment

\$50.00

Service Extras

Services

Complete Checkup

Checkup other disease

Staff

Select staff member

## 2.3 How Can Staff Members View Their Appointments

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### Go to MY Calander at My Accounts Page

At "My Calander" on "My Accounts" page all staff members will be able to view the appointments in a Google Calander as shown below.



# My Account

Dashboard 

Orders 

Downloads 

Addresses 

Account details 

Logout 

My Calendar 

## My Calendar

< > today month week day list

### September 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24 9a 1. Doctor	25	26	27	28 +5 more	29
30	1	2	3	4	5	6

## 2.4 How to View / Edit Appointments

### Step 1: Go to Appointments at the Backend

At the backend got to "Appointments" at the backend. Here you will find all the booked appointments. Check on any appointment to proceed.

Dashboard

Posts

**Appointments**

Appointments

Staff Members

Services Extras

Create Appointment

Calendar

Waiting List

Email Templates

Settings

Media

Pages

### Appointments

Browse... No file selected. [Import](#) [Export](#)

Order ID	Customer Name	Date	Service	Slot(s)	Status	
<a href="#">#183</a>	Peter Parker	2018-09-28	1. Doctor Appointment	1:05 PM	Waiting	<a href="#">Save</a>
<a href="#">#182</a>	Tanya Jones	2018-09-28	1. Doctor Appointment	1:05 PM	Waiting	<a href="#">Save</a>
<a href="#">#181</a>	James Madson	2018-09-28	1. Doctor Appointment	1:05 PM	Processing	<a href="#">Save</a>
<a href="#">#180</a>	Alice White	2018-09-28	1. Doctor Appointment	9:00 AM	Waiting	<a href="#">Save</a>

## Step 2: Appointment Details

Now here you can edit the appointment information and change it's status as per your requirement as shown below.

- Dashboard
- Posts
- Appointments
- Media
- Pages
- Comments 1
- WooCommerce
- Orders** 5
- Coupons
- Reports
- Settings
- Coupons
- Reports
- Settings
- Status
- Extensions
- Products
- Appearance
- Plugins
- Coupons
- Reports
- Settings
- Status
- Extensions
- Products
- Appearance
- Plugins
- Users
- Tools
- Settings
- Collapse menu

Edit order Add order

### Order #183 details

Payment via Cash on delivery. Customer IP: 115.186.155.133

**General**

Date created:  @  :

Status:

Customer: [Profile →](#) [View other orders →](#)

**Billing**

Peter Parker  
 123 Street  
 ABC  
 FATA  
 77755

**Shipping**

Address:  
 No shipping address set.

Email address:  
[paul.simmons@fmeaddons.com](mailto:paul.simmons@fmeaddons.com)

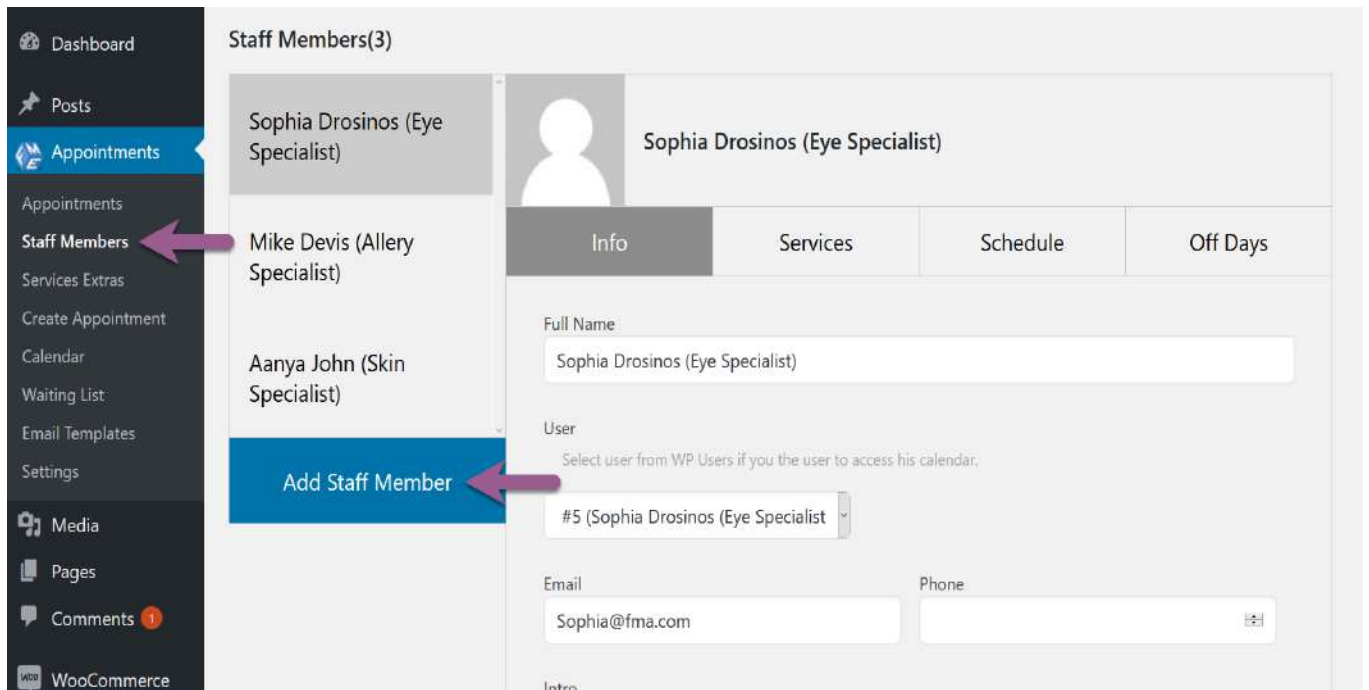
Phone:  
[111555555](tel:111555555)

Item	Cost	Qty	Total
<a href="#">1. Doctor Appointment</a> appointment_date: 2018-09-28 appointment_staff: Aanya John (Skin Specialist) slots: 1:05 PM service_extras: Complete Checkup status: wc-waiting _approved_from_waiting_mail_status: false _not_approved_from_waiting_mail_status: false _thankyou_mail_status: false	\$100.00	× 1	\$100.00

## How to Add / Edit Staff Members

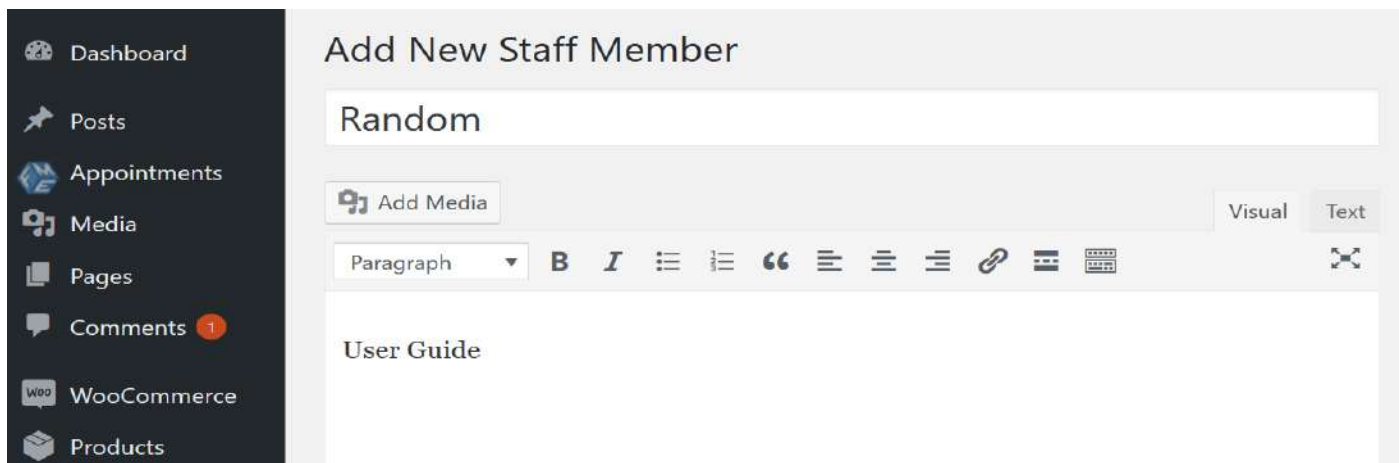
### Step 1: Go to Staff Members at the Backend

At the backend got to "Staff Members" at the backend. Here you will find all the staff members. Check on the "Add Staff Member" button to continue.



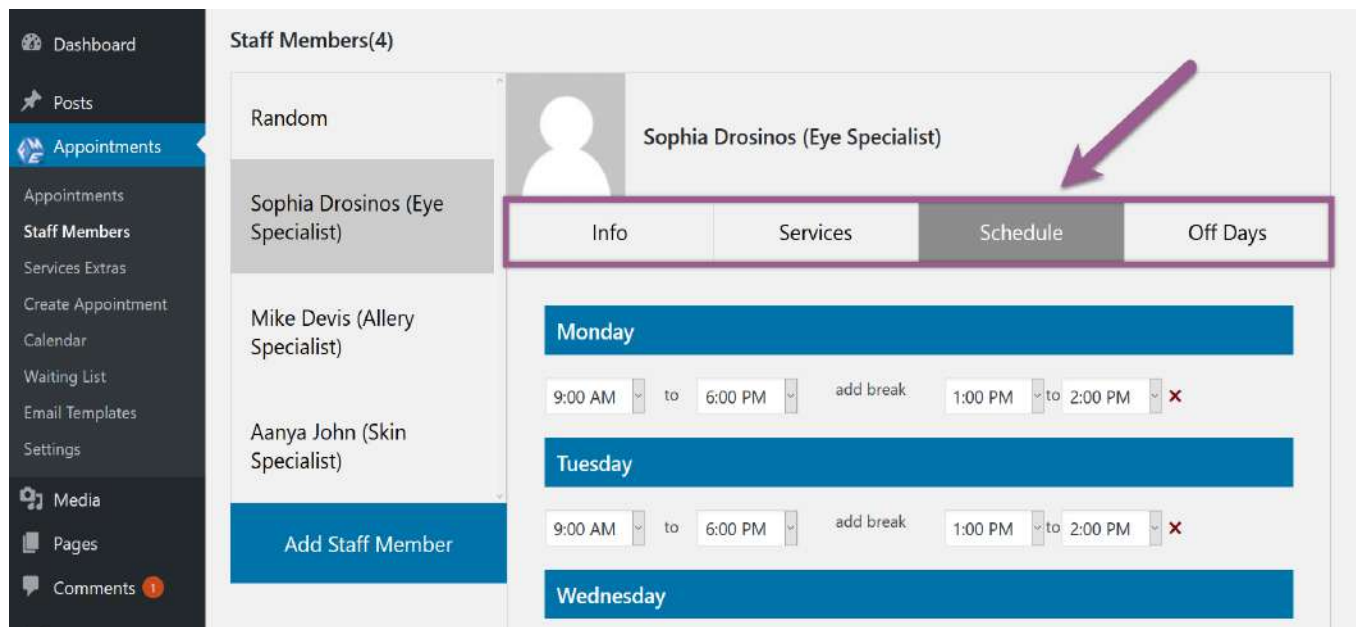
### Step 2: Fill Staff Member Information

Fill the staff member's required information. For the purpose of this guide we have added the following.



### Step 3: Provide Additional Appointable Staff Member Information

Once the staff member is added additional information needs to be added in order for the member to be appointable. All the highlighted tabs need to be filled as shown below.



The screenshot shows a web interface for managing staff members. On the left is a dark sidebar with navigation options: Dashboard, Posts, Appointments (highlighted), Appointments, Staff Members, Services Extras, Create Appointment, Calendar, Waiting List, Email Templates, Settings, Media, Pages, and Comments. The main content area is titled 'Staff Members(4)' and lists three staff members: Random, Sophia Drosinos (Eye Specialist), and Mike Devis (Allery Specialist). Below the list is an 'Add Staff Member' button. The profile for Sophia Drosinos is expanded, showing a profile picture, name, and specialty. Below the profile is a tabbed interface with four tabs: Info, Services, Schedule (highlighted with a purple arrow), and Off Days. The 'Schedule' tab displays a weekly schedule for Monday, Tuesday, and Wednesday. Each day has a blue header bar and a schedule row with time slots (9:00 AM to 6:00 PM) and a break slot (1:00 PM to 2:00 PM) marked with a red 'X'.

### 2.5 How Can Staff Members View Their Appointments

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#### Go to MY Calander at My Accounts Page

At "My Calander" on "My Accounts" page all staff members will be able to view the appointments in a Google Calander as shown below.

# My Account

Dashboard 

Orders 

Downloads 

Addresses 

Account details 

Logout 

My Calendar 

## My Calendar

< > today month week day list

### September 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24 9a 1. Doctor	25	26	27	28 +5 more	29
30	1	2	3	4	5	6

## 2.6 How to Add Extra Services

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### Step 1: Go to Service Extra at the Backend

At the backend got to "Service Extra" at the backend. Here you will find all the extra services. Check on the "Add Service Extra" button to continue.

The screenshot shows the WordPress dashboard with the 'Appointments' menu selected. The 'Service Extras' section is active, displaying a list of existing service extras. A purple arrow points to the 'Add Service Extra' button at the top of the page.

<input type="checkbox"/>	Title	Type	Cost
<input type="checkbox"/>	Checkup other disease	optional	10
<input type="checkbox"/>	Complete Checkup	optional	10
<input type="checkbox"/>	Title	Type	Cost

## Step 2: Fill Required Information

Here you have to fill extra service's information. For the purpose of this guide we have added the following.

The screenshot shows the 'Edit Service Extra' form. The title is 'Checkup other disease'. The 'Service Extra Details' section includes a dropdown for 'Service type' set to 'Optional/Paid' and a 'Price per slot' field set to '10'. There are also radio buttons for 'Multiple price by appointments count' (set to 'Yes') and 'Multiple price by slots count' (set to 'No'). The 'Publish' sidebar shows the status as 'Published', visibility as 'Public', and a 'Published on' date of 'Sep 17, 2018 @ 09:32'. A 'Move to Trash' link and an 'Update' button are also visible.

## Step 3: Frontend

Now at the frontend you extra service will be displayed as the following. You can always go back and edit this information.



# 1. Doctor Appointment

\$50.00

Service Extras

Services

- Complete Checkup
- Checkup other disease



## 2.7 How can Admin(s) Create Appointments for Customers

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### Go to Create Appointment at the Backend

At the backend go to "Create Appointment". Here you can create appointments for your customers as displayed below.



**Appointments**

- Appointments
- Staff Members
- Services Extras
- Create Appointment**
- Calendar
- Waiting List
- Email Templates
- Settings

- Media
- Pages
- Comments 1
- WooCommerce
- Products
- Appearance
- Plugins
- Users
- Tools

### Create new Appointment

Customer: #2 (addtoquote-user) addtoquote@example.com

Select service: 1. Doctor Appointment

Service Extras

Services

Complete Checkup  Checkup other disease

Staff

Aanya John (Skin Specialist)(\$20)

Appointment Date

Choose a date

Total: \$70.00

[Save](#)

## 2.8 How to View all the Appointments

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### Go to Calender at the Backend

At the backend go to "Calender". Here you can find all the appointments booked by your customers as displayed below.

The screenshot displays the WordPress Bookings Calendar interface. On the left is a dark sidebar with navigation options: Dashboard, Posts, Appointments (highlighted), Appointments, Staff Members, Services Extras, Create Appointment, Calendar (selected), Waiting List, Email Templates, Settings, Media, Pages, Comments (1), WooCommerce, Products, Appearance, Plugins, Users, Tools, Settings, and Collapse menu. The main area is titled 'Bookings Calendar' and shows a calendar for 'September 2018'. Navigation buttons for '<', '>', and 'today' are present. The calendar grid has columns for days of the week (Sun to Sat) and rows for dates. Appointments are shown as blue boxes with text: '9a 1. Doctor Appointment' on Monday, September 24th, and '9a 1. Doctor Appointment', '1:05p 1. Doctor Appointment', and '1:05p 1. Doctor Appointment' on Friday, September 28th. At the bottom, there is a footer: 'Thank you for creating with WordPress.' and 'Version 4.9.8'.

## 2.9 How to View all the Waiting List Customers

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### Go to Waiting List at the Backend

At the backend go to "Waiting List". Here you can find all the appointments booked by your customers that are on the waiting list as displayed below. You can change their status as per your requirement.

Waiting List				
1. Doctor Appointment				
Order ID	Customer Name	Date	Slot(s)	Status
#183	Peter Parker	2018-09-28	1:05 PM	Waiting <input type="button" value="Save"/>
#182	Tanya Jones	2018-09-28	1:05 PM	Waiting <input type="button" value="Save"/>
#180	Alice White	2018-09-28	9:00 AM	Waiting <input type="button" value="Save"/>

## 2.10 How to Create Email Template

### Step 1: Go to Email Templates at the Backend

At the backend got to "Email Templates" at the backend. Here you will find all the email templates. Check on the "Add Template" button to continue.

The screenshot shows the WordPress backend interface for 'Email Templates'. The left sidebar contains navigation options: Dashboard, Posts, Appointments, Appointments, Staff Members, Services Extras, Create Appointment, Calendar, Waiting List, **Email Templates**, Settings, Media, Pages, Comments (1), WooCommerce, and Products. The main content area is titled 'Email Templates' and features an 'Add Template' button highlighted with a purple arrow. Below the button, there are filters for 'All (5) | Published (4) | Draft (1)', a search bar, and a 'Bulk Actions' dropdown. The table below lists the templates:

<input type="checkbox"/>	Subject	Send Time	Status
<input type="checkbox"/>	thank you	Thank You	publish
<input type="checkbox"/>	after appointment cancelled	After cancelled	publish
<input type="checkbox"/>	After approved	After approved	publish
<input type="checkbox"/>	After appointment	After Appointment	publish
<input type="checkbox"/>	After appointment — Draft		draft
<input type="checkbox"/>	Subject	Send Time	Status

### Step 2: Fill Email Templates Information

Now here you have to provide your email template information plus which step the email will be sent. For the purpose of the guide we have saved the following which can be edited afterwards.

- Dashboard
- Posts
- Appointments
- Media
- Pages
- Comments 1
- WooCommerce
- Products
- Appearance
- Plugins Comments 1
- WooCommerce
- Products
- Appearance
- Plugins
- Users
- Tools
- Settings
- Collapse menu

## Edit Template [Add Template](#)

thank you

Add Media

Visual Text

Paragraph

**B** *I*

Email Custom Variables



thank for doing business with us.  
{{appointment\_details\_table}}

Word count: 7

Last edited by admin on September 24, 2018 at 6:22 am

Send Time

Thank you mail