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Getting Started

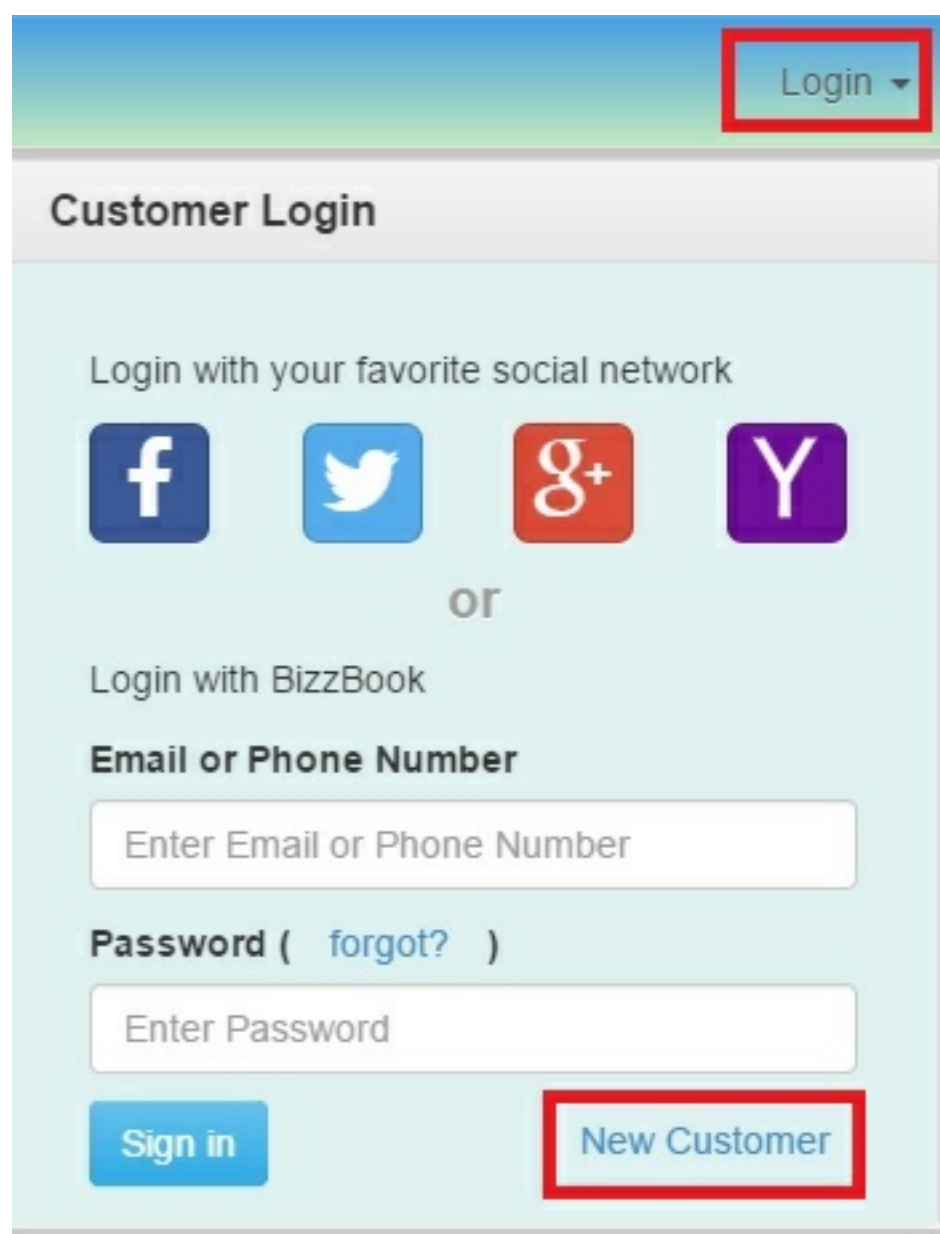
What does it mean to be a AppointmentPro service end-user?

A service end-user is an individual who uses services offered by businesses featured on AppointmentPro. As a service end-user, you will be able to view businesses in your area (or any area you choose), make appointments online, communicate with the business and submit reviews of the businesses you patronize.

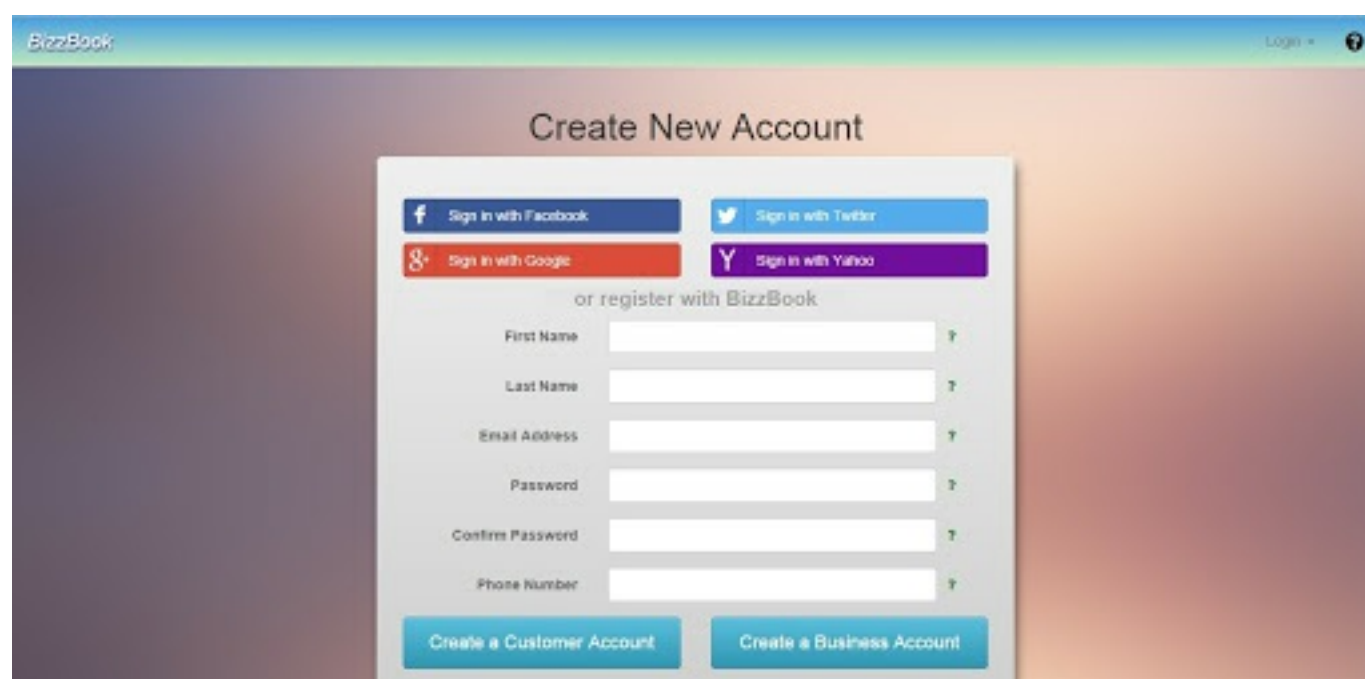
How do I register for AppointmentPro?

To use the AppointmentPro service you need to be registered first.

1. Go to AppointmentPro.com and click on the down arrow next to the **Login** at the top right corner.



2. Select the **New Customer** link, which would take you to the **Create New Account** page.



3. You can then fill in your details and select the **Create a Customer Account** button.
4. You can also opt to sign in to AppointmentPro with your Facebook, Google, Twitter or Yahoo ID. Simply go to AppointmentPro.com and click on the down arrow next to the **Login** at the top right corner, then click the relevant social network icon.



I have lost my password. How do I get a new password?

1. Go to <http://AppointmentPro.com/> and click on the down arrow next to the Login at the top right corner.
2. Select the **forgot?** link, which will take you to our **Reset your password** page.



3. Enter the email address associated with the AppointmentPro site, and press **Reset your password**.



4. A password reset email will be sent to you. Click on the link included in the email, and reset your password.

Please note that the AppointmentPro system does not support “Password Recovery” for accounts created using Social Networks. If you have misplaced your password to a Social Media network, please refer to the Help section of that Social Media.

Manage My Account

I want to add a profile picture

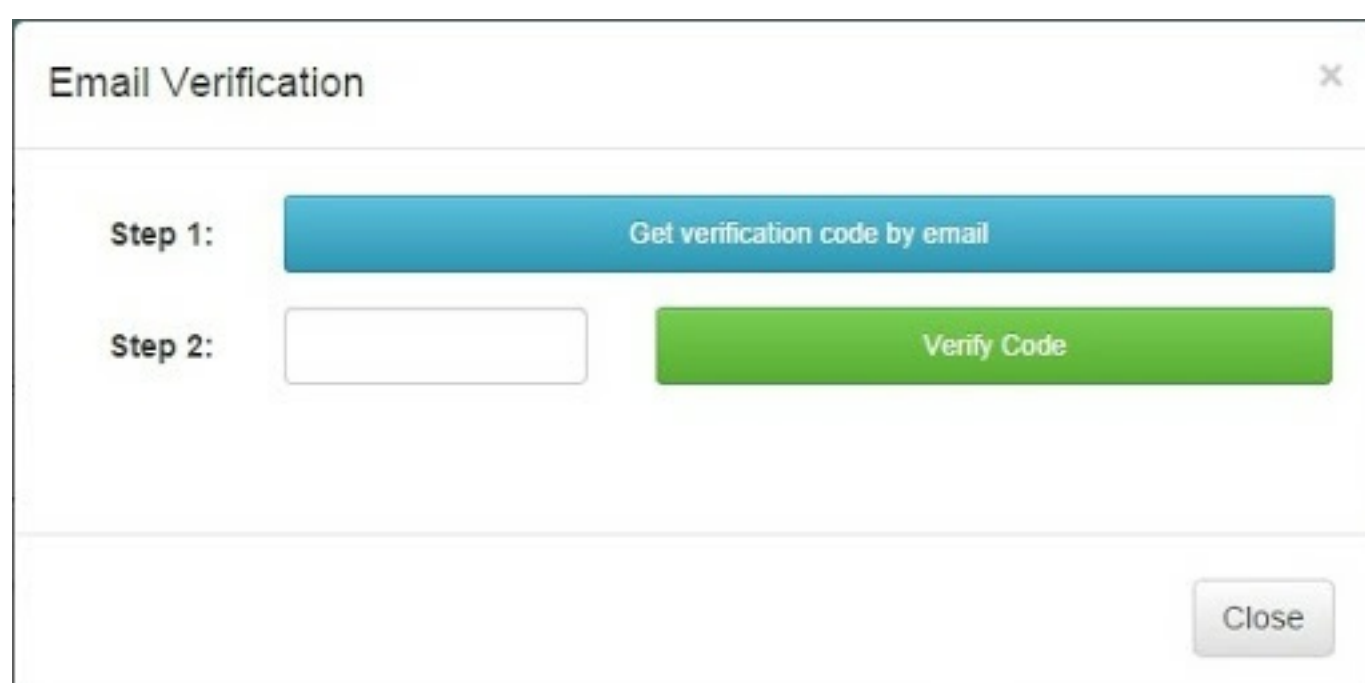
You can add a profile picture by dragging and dropping a picture to the profile picture section in the **Contact** tab.

How do I verify my email address and phone number for AppointmentPro?

You can verify your contact details via the **Profile** page – simply login to AppointmentPro and click on the **Profile** menu, then select **Contact** on the left-hand menu.

To Verify Email Address

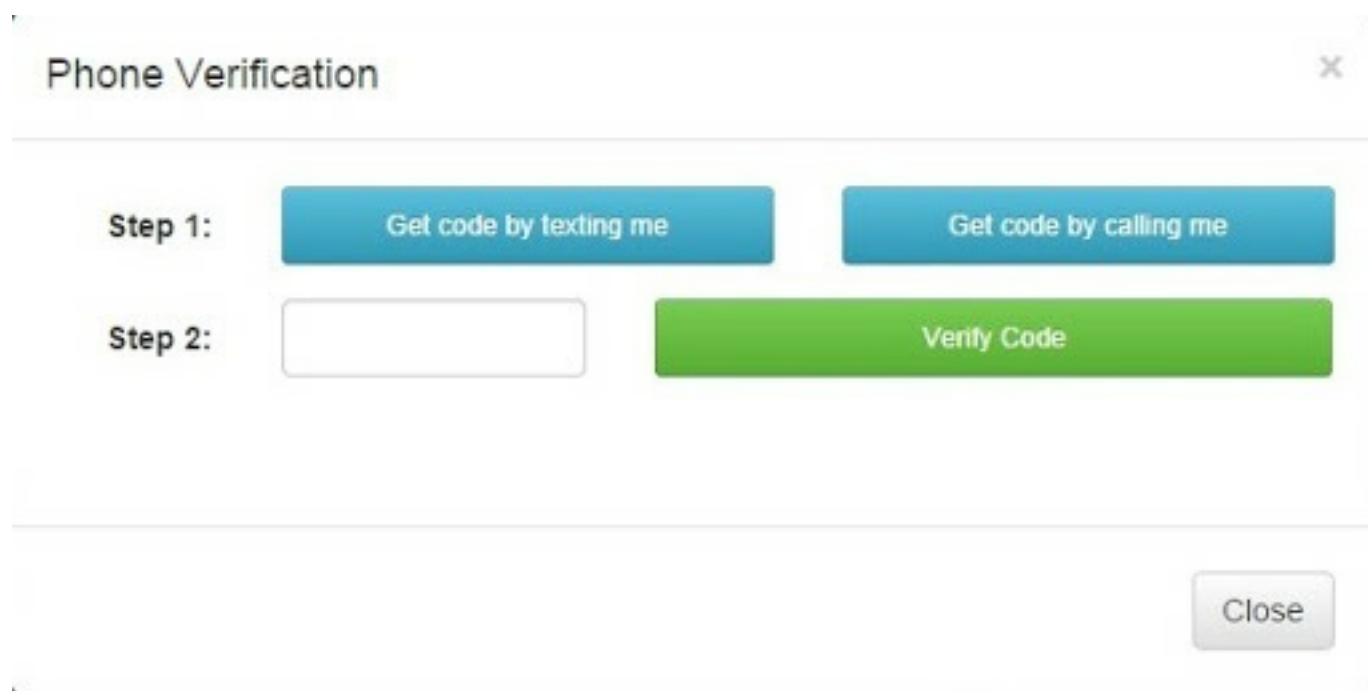
1. Click on the **Unverified** button next to the email address you want to verify.
2. This will open the **Email Verification** popup.



3. Press the **Get verification code by email** button.
4. You will receive an email giving you a verification code.
5. Copy and paste this verification code into the **Step 2** box, then press **Verify Code**.
6. You will see a green alert stating that **Email was successfully verified**.

To Verify Phone Number

1. Click on the **Unverified** button next to the phone number you want to verify.
2. This will open the **Phone Verification** popup.



3. Press the **Get code by texting me** or **Get code by calling me** button.
4. If you requested the code by text, you will receive a text message giving you a verification code. If you requested the code via a call, you will receive a phone call giving you the verification code.
5. Copy and paste this verification code into the **Step 2** box, then press **Verify Code**.
6. You will see a green alert stating that **Phone number was successfully verified**.

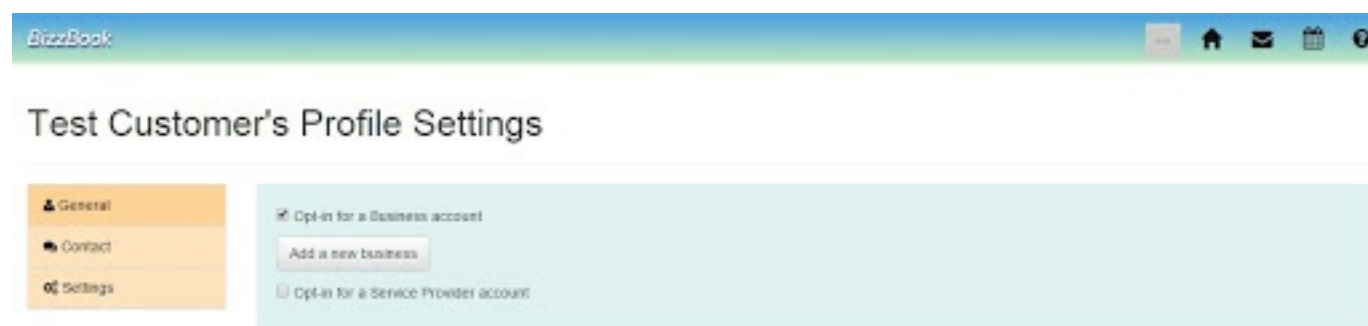
How do I delete my AppointmentPro account?

Please send a removal request to support@AppointmentPro.com.

How do I make my existing AppointmentPro account a staff account?

As a staff account, you will be able to perform various tasks for your business, such as view your appointments and unattached appointments, reschedule appointments, and work with the **Business Dashboard**.

1. Login to AppointmentPro and click on the **Profile** menu.
2. This will open the **Profile Settings** on the **General** tab.



3. Select the **Opt-in for a Service Provider account** checkbox.
4. You will not be added into any businesses until the business owner adds you as staff, at which point you will receive an email from AppointmentPro with further instructions.

I have a customer account and would like to add my business to the system. How do I do this?

Please see the **How do I register my business with AppointmentPro?** In the Business section, and scroll down to the **As an existing customer** section.

I want to add/change a phone number

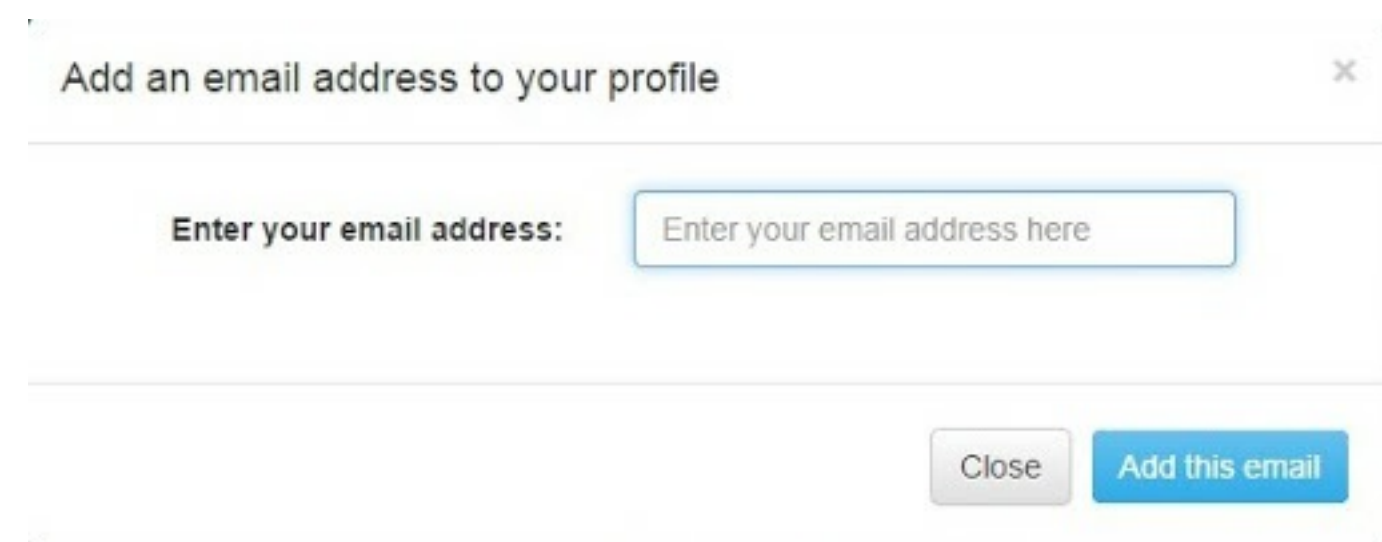
You can add a new phone number by pressing the **Add a new Phone Number** button. In the **Add a phone number to your profile popup**, enter your new phone number, then press **Add this phone number**, and you will find your new phone number added to the list of phone numbers.



Please note that if you want to remove your primary phone number, you need to first add a new phone number, make it your primary phone number, then delete the original phone number.

I want to add/change my email address

You can add a new email address by pressing the **Add a new Email Address** button. In the **Add an email address to your profile** popup, enter your new email address, then press **Add this email**, and you will find your new email address added to the list of email addresses.



Please note that if you want to remove your primary email address, you need to first add a new email address, make it your primary email, then delete the original email address.

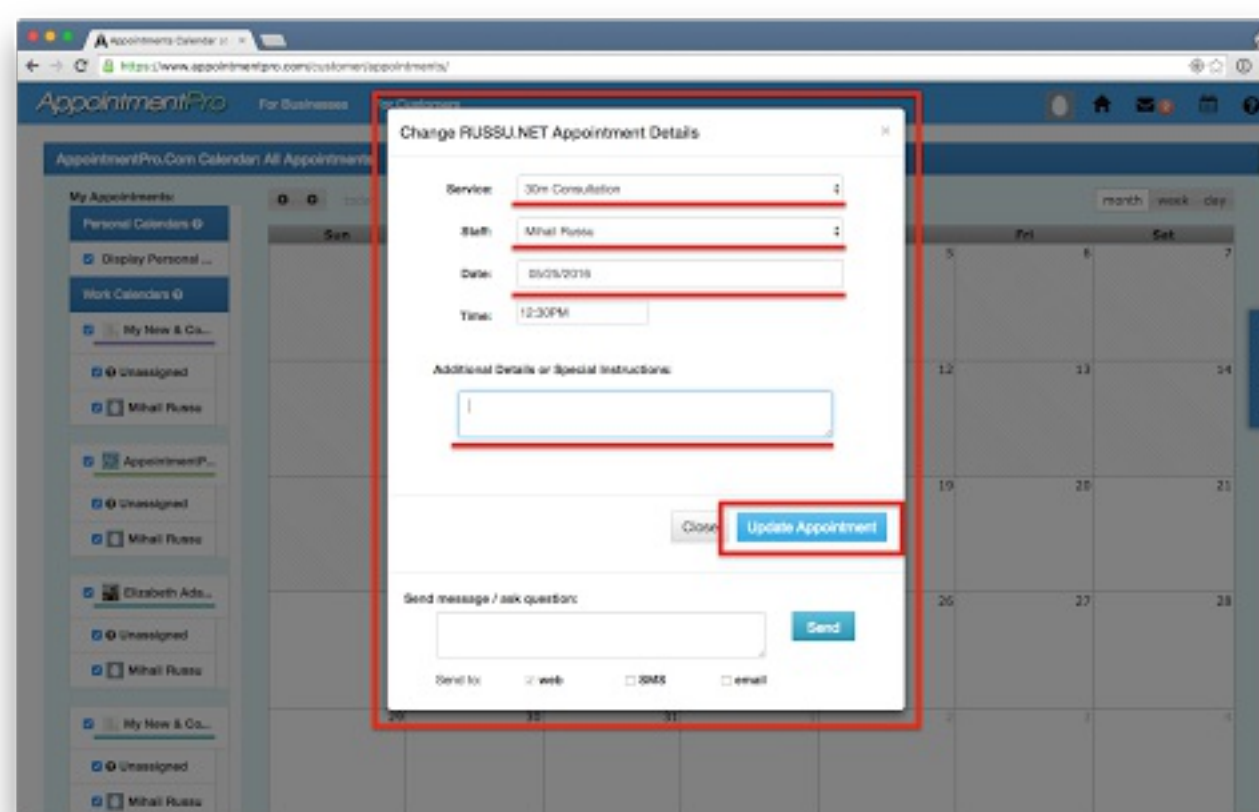
I want to change my name

Your name can be changed by editing the First Name and Last Name in the **Contact** tab.

Manage Appointments

How do I change the details of an existing appointment?

1. Go to **How do I view the Business Calendar?** to reach the **Business** Calendar.
2. Once on the **Calendar** page, click on the relevant appointment. This will open the appointment in the **Change Appointment Details** popup.



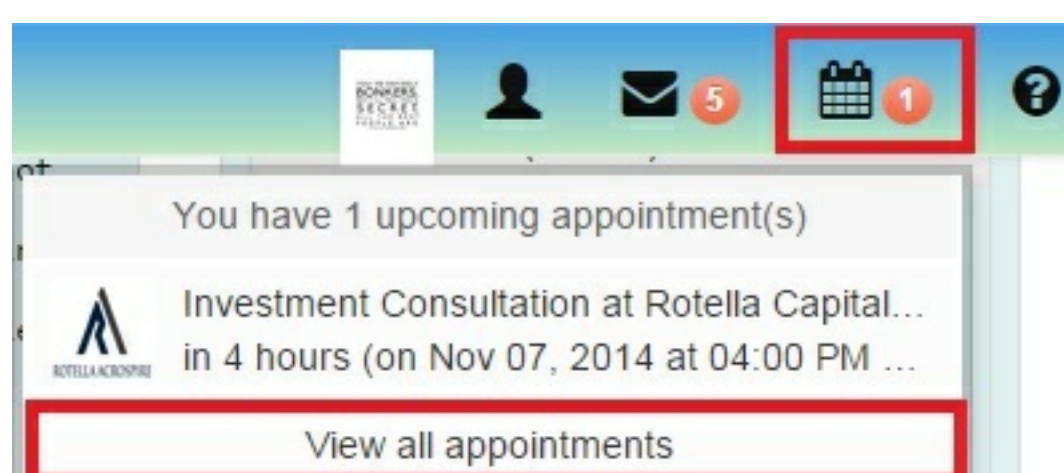
3. Edit necessary details and press **Update Appointment** to save changes.

Manage My Appointments

How do I view all my appointments?

To view your appointments, you need to be logged into your AppointmentPro account.

1. In your profile, click on the **Appointments** menu, and click **View all appointments** in the submenu.



2. You will be taken to your personal **Calendar** page, which would show you all the appointments you have made.



How do I sync appointments with my Outlook Calendar?

1. Go to <http://AppointmentPro.com/customer/profile/settings> or in AppointmentPro, go to **Profile**, then **Settings** in the left-hand menu.
2. Click on the link provided
3. At the prompt, **Add this Internet Calendar to Outlook and subscribe to updates**, click **Yes**.

The Internet Calendar opens in side-by-side view in the Outlook Calendar and is added to the Navigation Pane in Calendar view under **Other Calendars**.

You can also add a calendar from within Outlook using the following steps:

1. Select **Add Calendar**, **FROM Internet**, Add the calendar's web address

How do I add a review to a business I've visited?

Login to AppointmentPro and click on **Appointments > View All Appointments**.

In the **Calendar**, click on the appointment you wish to review.

This will lead you to the **Leave Feedback** form.

You can rate the service provided based on a five-star system, and also write a review.

If you mark the review as **Public**, it will be associated with your appointment, and the business owner will know the review is by you. If you mark the review as **Anonymous**, the review will still be published, but will not be attached to your appointment.

Press the **Update feedback** button to save your review details.

How do I sync appointments with my calendar?

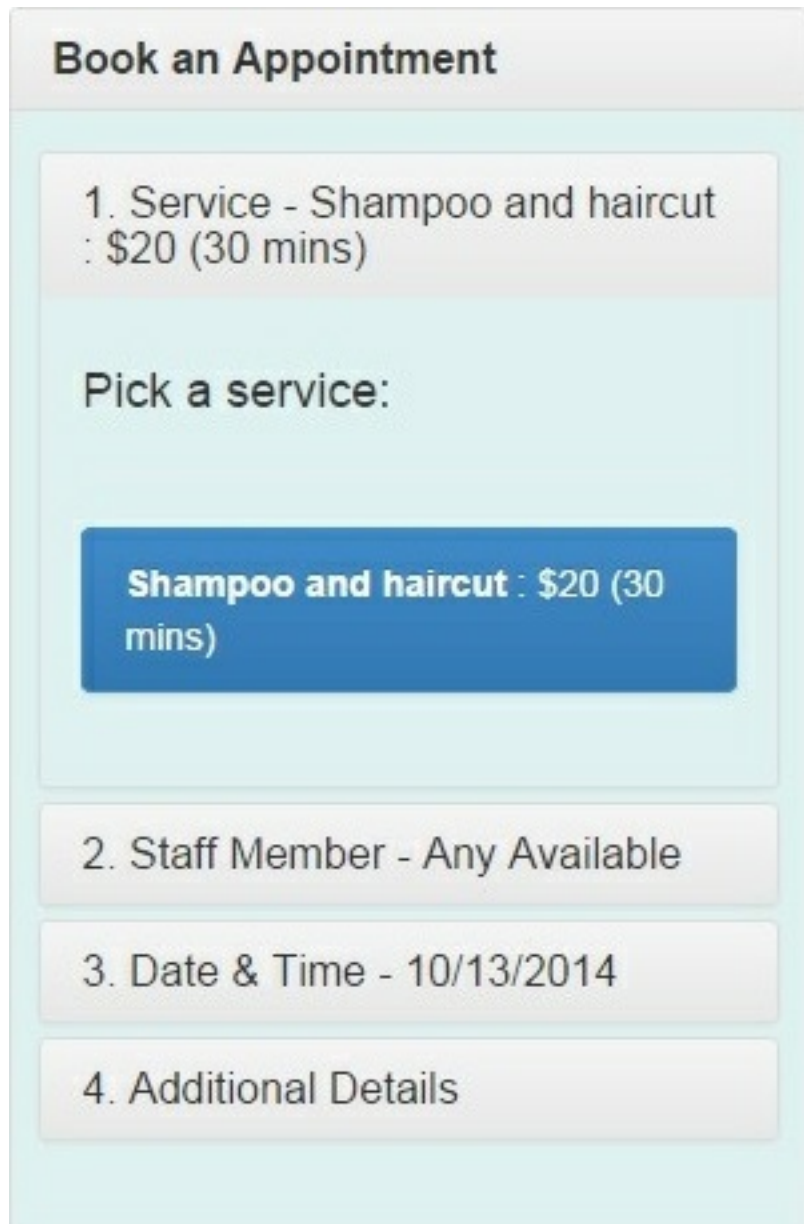
To add appointments from the AppointmentPro calendar to your regularly used Calendar (whether Google, Outlook, Yahoo or iCal), you will need the web address to your AppointmentPro calendar. The web address can be found via the following steps:

1. Login to AppointmentPro, then go to **Profile**
2. Select **Settings** in the left-hand menu.
3. The link to the calendar feed is shown in the **Click on the following link if your browser handles calendar links** area.

The steps for syncing with your calendars are given below.

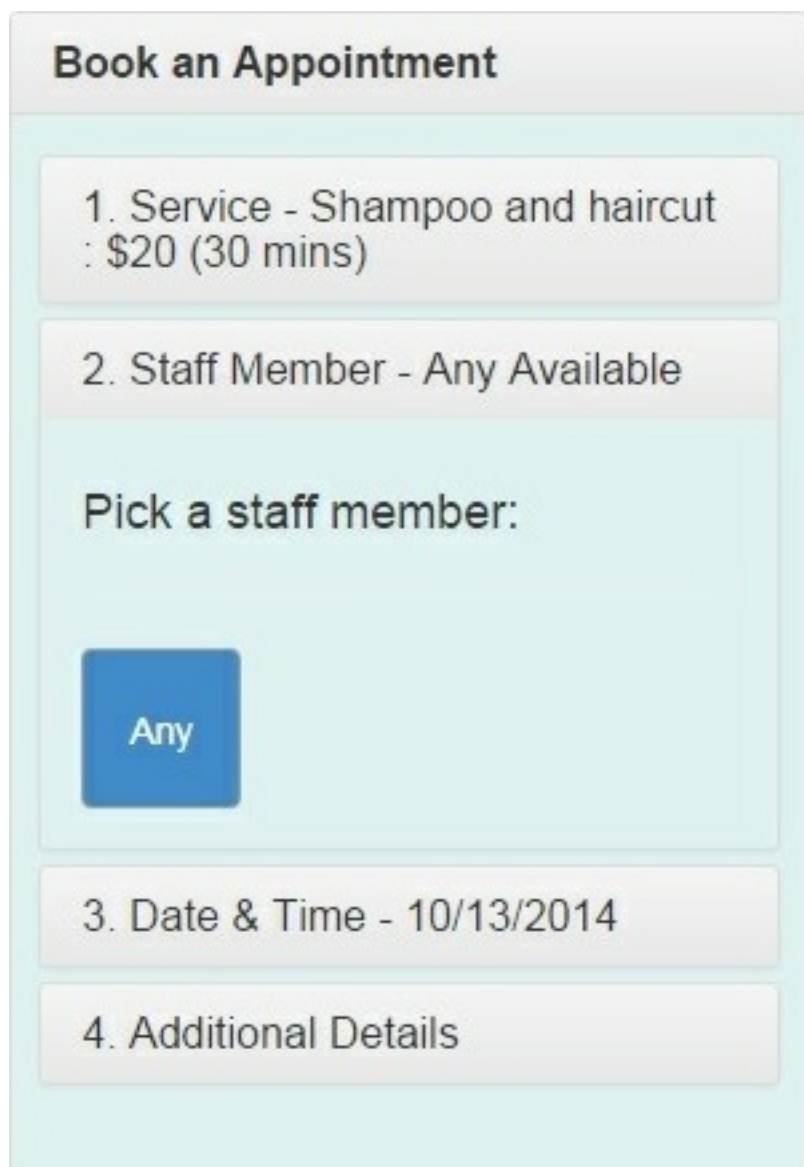
How do I book an appointment?

1. Once you have found the business you were looking for (see **How do I find a business in my area?** for instructions on how to use **Search**), you can select the appointment time which works for you. Alternatively, you can hover over businesses shown on the map, and click on the correct business name to be taken to the **Book an appointment** page.
2. Select the service you require from the **1. Service – select** section.



The screenshot shows a form titled "Book an Appointment". It has four sections: 1. Service - Shampoo and haircut : \$20 (30 mins), 2. Staff Member - Any Available, 3. Date & Time - 10/13/2014, and 4. Additional Details. The first section is highlighted with a light blue background. Below the service name, there is a label "Pick a service:" and a blue button with the text "Shampoo and haircut : \$20 (30 mins)".

3. Select the staff member you would want to perform the service from the **2. Staff Member – Any Available** section. If there are no specific staff members associated with this service, select the **Any** option.



The screenshot shows the same "Book an Appointment" form. The second section, "2. Staff Member - Any Available", is highlighted with a light blue background. Below the section title, there is a label "Pick a staff member:" and a blue button with the text "Any".

4. Select a date and time for the appointment from the **3. Date & Time** section

Book an Appointment

1. Service - Shampoo and haircut : \$20 (30 mins)

2. Staff Member - Any Available

3. Date & Time - 10/13/2014

Pick date and time:

Select Date: 10/13/2014

09:00AM	09:30AM	10:00AM
10:30AM	11:00AM	11:30AM
12:00PM	12:30PM	01:00PM
01:30PM	02:00PM	02:30PM
03:00PM	03:30PM	04:00PM
04:30PM		

4. Additional Details

5. If additional details are required, enter the relevant details and press **Submit Reservation**.

Book an Appointment

1. Service - Shampoo and haircut : \$20 (30 mins)

2. Staff Member - Any Available

3. Date & Time - 10/13/2014

4. Additional Details

Additional Details or Special Instructions:

Submit Reservation

If successful, this appointment can now be viewed in the **Appointments** menu of your profile.

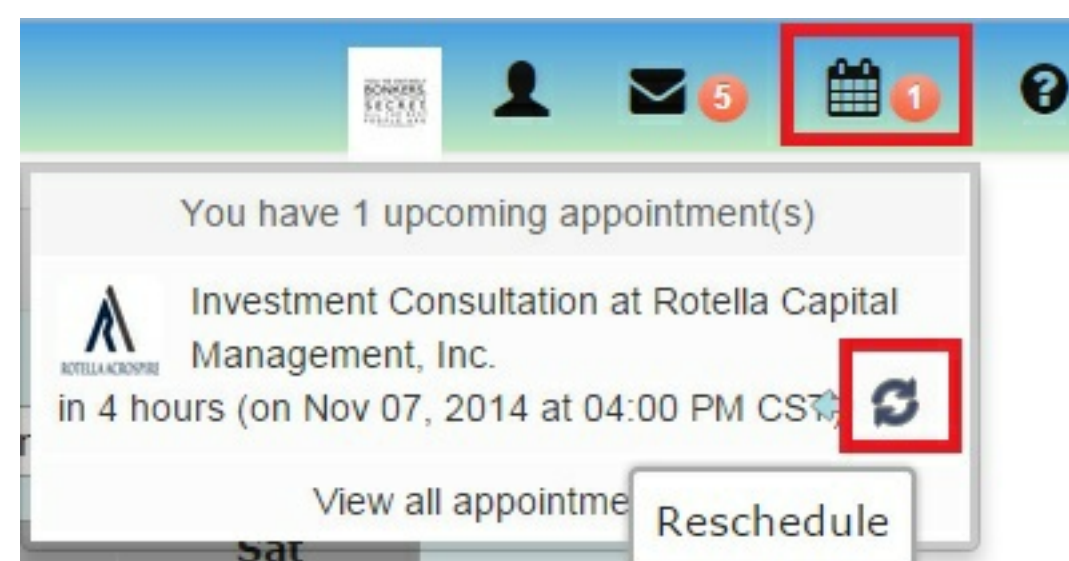
How do I cancel an appointment?

To view your appointments, you need to be logged into your AppointmentPro account. Once logged into your profile, there are two ways in which you can cancel your appointment

A. Via the menu

1. Click on the Appointments menu, and click on the circular **Reschedule** button of the relevant appointment in the submenu. This will open the **Change**

appointment details window.



Change Rotella Capital Management, Inc. Appointment Details ×

Service:

Staff:

Date:

Time:

Additional Details or Special Instructions:

Additional Info
Place:

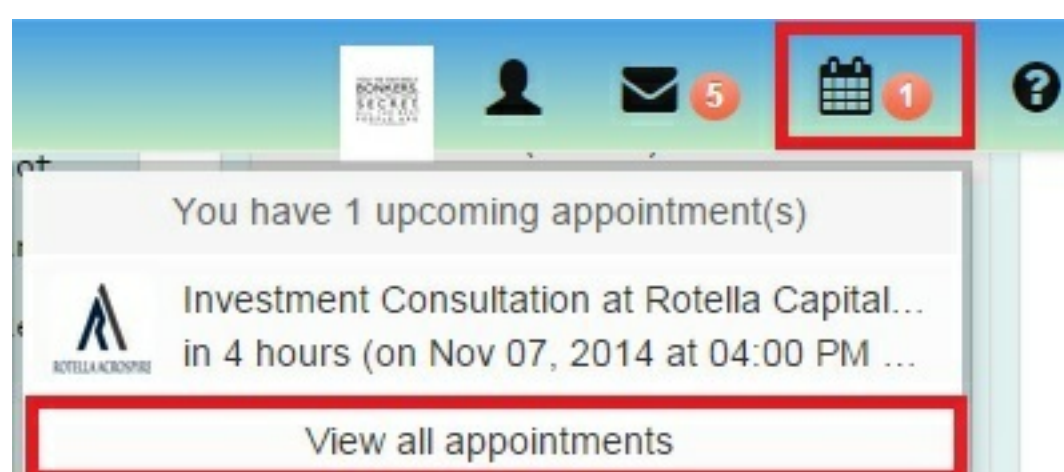
Send message / ask question:

Send to: web SMS email

2. Click on the **Cancel This Appointment** button to cancel the appointment.

Via the **Calendar** page

1. If the appointment is not visible in the submenu, click on **View all appointments** in the submenu to view all your appointments.



2. Click on the relevant appointment in the **Calendar**. This will open the **Change appointment details** window.

Change Rotella Capital Management, Inc. Appointment Details ×

Service:

Staff:

Date:

Time:

Additional Details or Special Instructions:

Additional Info
Place:

Send message / ask question:

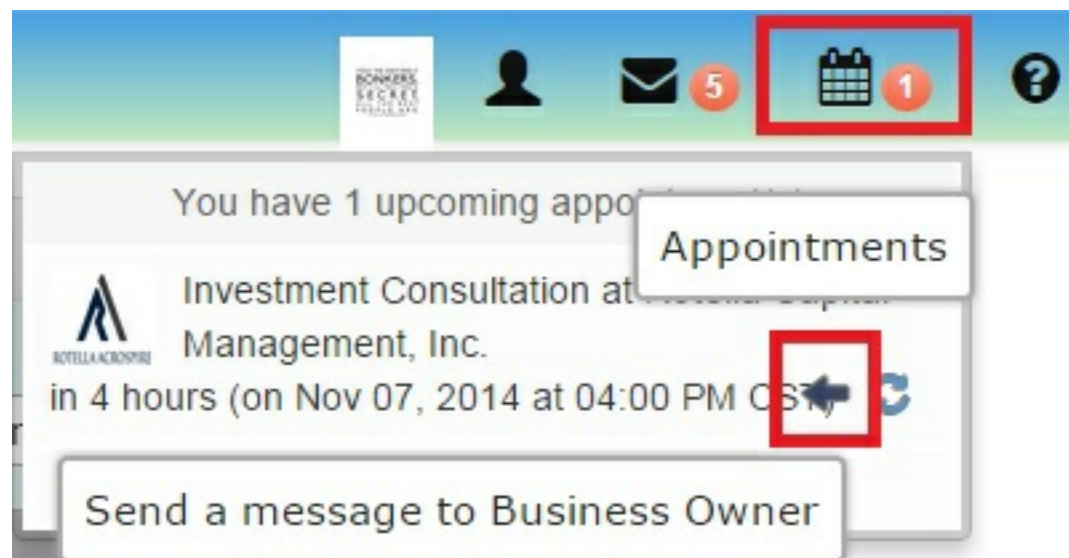
Send to: web SMS email

3. Click on the **Cancel This Appointment** button to cancel the appointment.

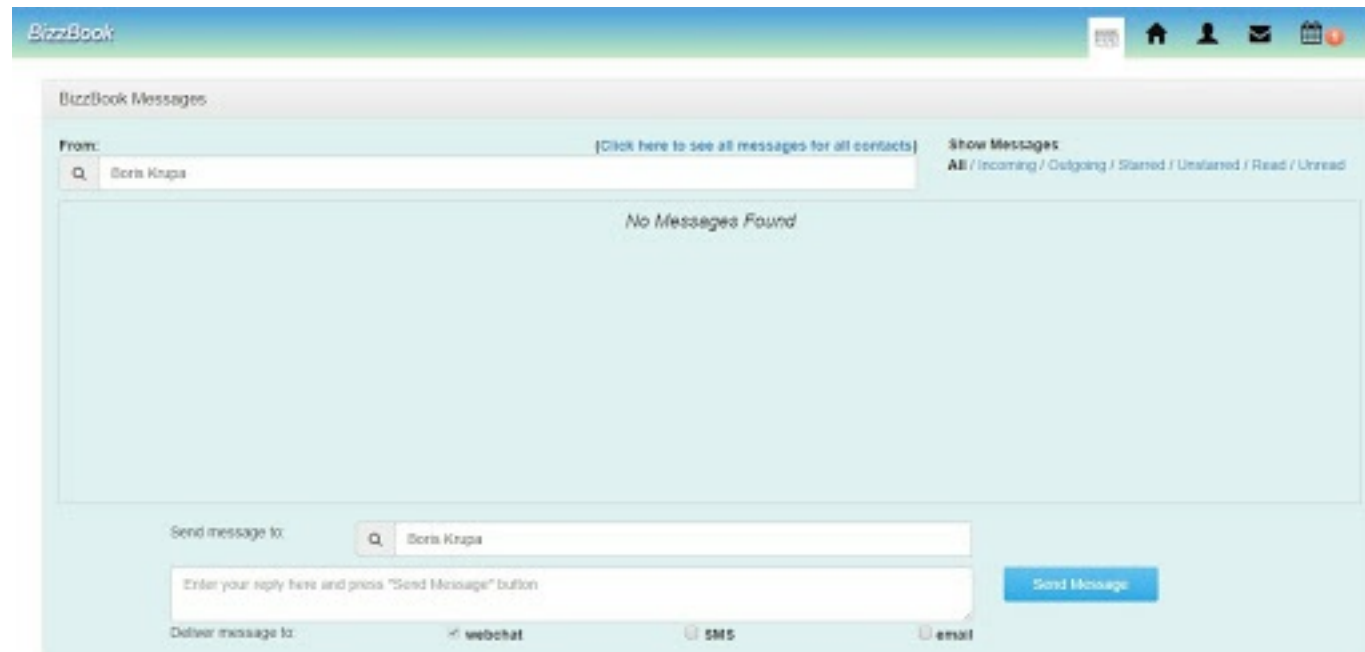
How do I contact a staff member of my upcoming appointment?

To view your appointments, you need to be logged into your AppointmentPro account.

1. Click on the Appointments menu, and click on the arrow **Send a message to business owner** button of the relevant appointment in the submenu.



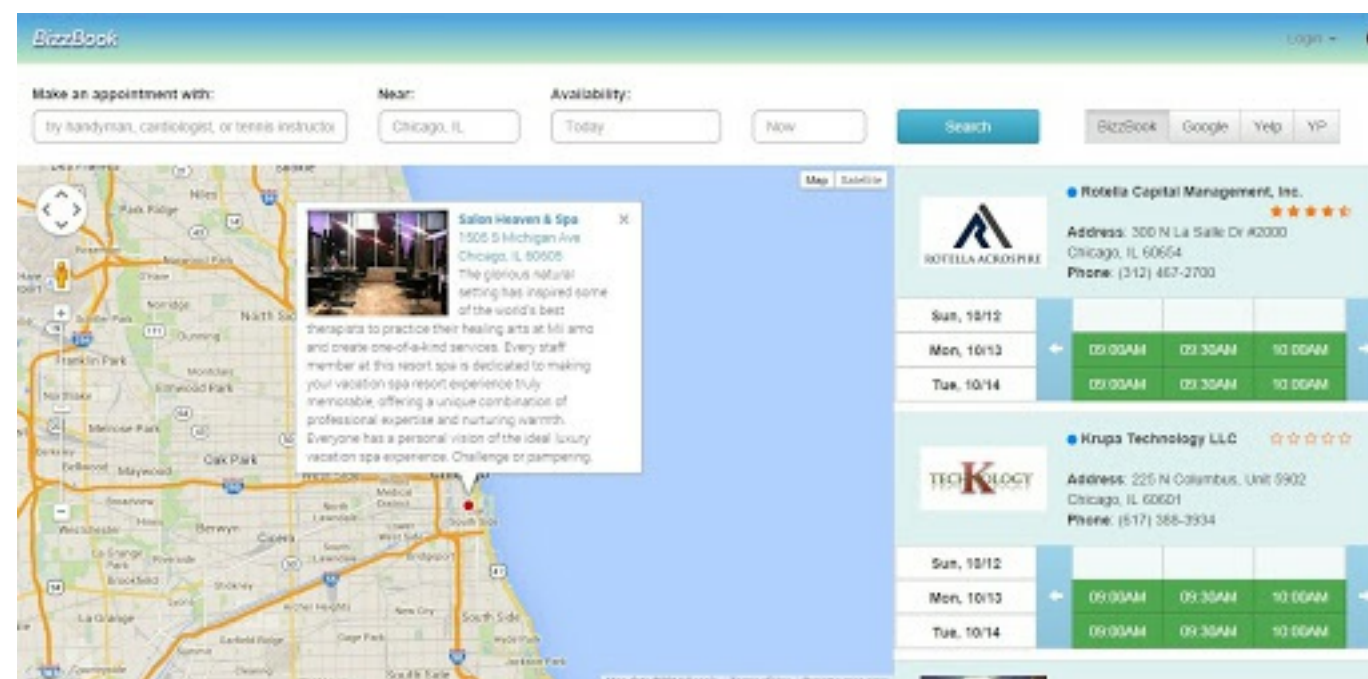
- This will open the **AppointmentPro Messages** page, with the business owner's name in the **Send a message to** field.



- Type out your message and select **Deliver message to** options. Delivery by WebChat is always enabled; select SMS and/or email if you want the message delivered by multiple methods.
- Click the **Send Message** button.

How do I find a business in my area?

The <http://AppointmentPro.com/> front page shows the main search screen. Here, you will see your current location added into the **Near** field, and the map should be centered at that location.



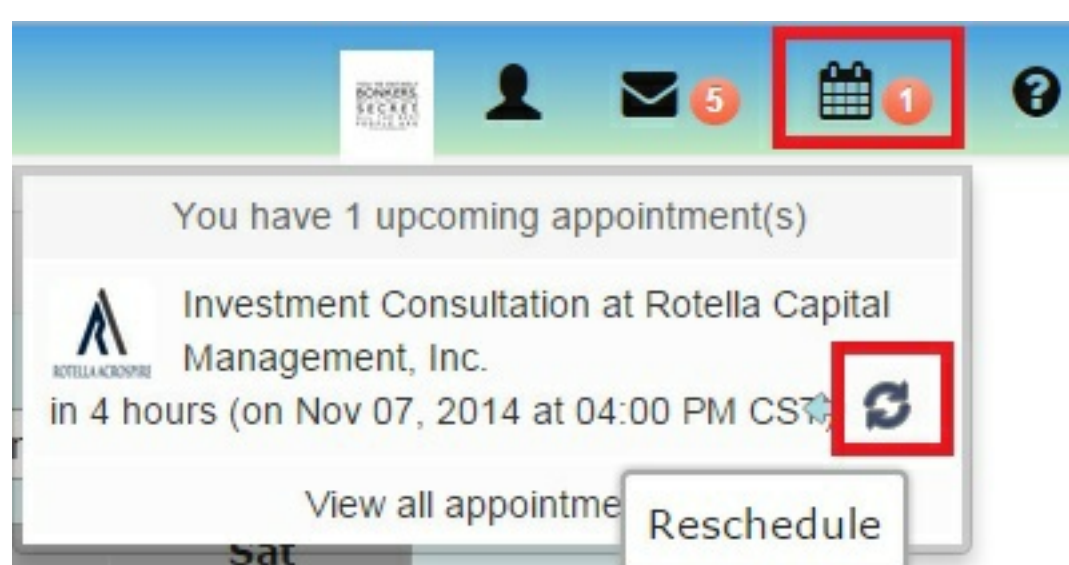
- If you know the name of the business you are looking for, you can enter the name of the business in the **Make an appointment with** field. Otherwise you can enter the type of business you are looking for, e.g. hair salon.
- If the current location is not where you want to find a business, you can enter the location in the **Near** field.
- You can also enter the date and time you wish the appointment for, if you like.
- You can then click on the **Search** button to view any businesses which match your search criteria.
- If there are any businesses which match your criteria, they will be shown along the right edge of the window, along with details of hours available for appointments.

How do I reschedule my appointment?

To view your appointments, you need to be logged into your AppointmentPro account. Once logged into your profile, there are two ways in which you can cancel your appointment

Via the menu

- Click on the **Appointments** menu, and click on the circular **Reschedule** button of the relevant appointment in the submenu. This will open the **Change appointment details** window.



Change Rotella Capital Management, Inc. Appointment Details ✕

Service:

Staff:

Date:

Time:

09:00AM	09:30AM	10:00AM	10:30AM	11:00AM
11:30AM	12:00PM	12:30PM	01:00PM	01:30PM
02:00PM	02:30PM	03:00PM	03:30PM	04:00PM
				04:30PM

Additional Details or Special Instructions:

Additional Info
Place:

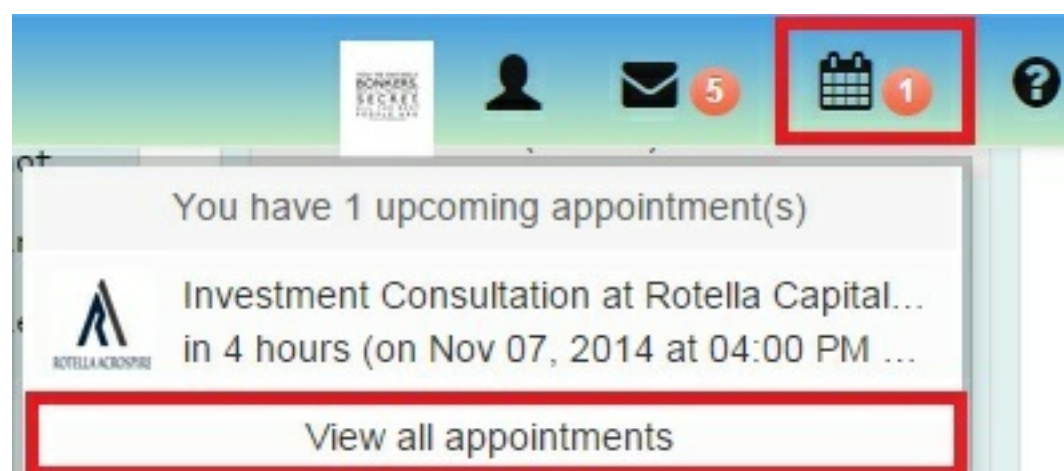
Send message / ask question:

Send to: web SMS email

2. Select the new date and time, and click on the **Update Appointment** button to reschedule the appointment.

Via the Calendar page

1. If the appointment is not visible in the submenu, click on **View all appointments** in the submenu to view all your appointments.



2. Click on the relevant appointment in the **Calendar**. This will open the **Change appointment details** window.

Change Rotella Capital Management, Inc. Appointment Details ✕

Service:

Staff:

Date:

Time:

09:00AM	09:30AM	10:00AM	10:30AM	11:00AM
11:30AM	12:00PM	12:30PM	01:00PM	01:30PM
02:00PM	02:30PM	03:00PM	03:30PM	04:00PM
				04:30PM

Additional Details or Special Instructions:

Additional Info
Place:

Send message / ask question:

Send to: web SMS email

3. Select the new date and time, and click on the **Update Appointment** button to reschedule the appointment.
4. To change the date of the appointment, you can simply drag and drop the appointment to the correct date in the **Calendar** itself.

How do I sync appointments with my iCal?

1. In **Calendar**, choose **File > New Calendar Subscription**.
2. Enter the calendar's web address, and then click **Subscribe**.
3. Enter a name for the calendar in the **Name** field and choose a color from the adjacent pop-up menu.
4. If you have an iCloud account, choose whether you want the calendar on that account.

5. To view a subscription calendar in Calendar on your Mac and on devices with iOS 5 or later without resubscribing to it, choose your iCloud account.
6. To get the calendar's event attachments or alerts, deselect the appropriate Remove checkboxes.
7. To update your copy of the calendar when changes to it are published, choose the update frequency from the "Auto-refresh" pop-up menu.
8. Click **OK**.

How do I sync appointments with my Google Calendar?

To add a calendar using its address, follow these steps:

1. Click the down-arrow next to **Other calendars**.
2. Select **Add by URL** from the menu.
3. Copy and paste the calendar's web address given in the **Click on the following link if you browser handles calendar links** area into the field provided.
4. Click **Add calendar**. The calendar will appear in the **Other calendars** section of the calendar list to the left.

Note: It may take up to 8 hours for changes in ICS feeds to reflect in your Google Calendar.