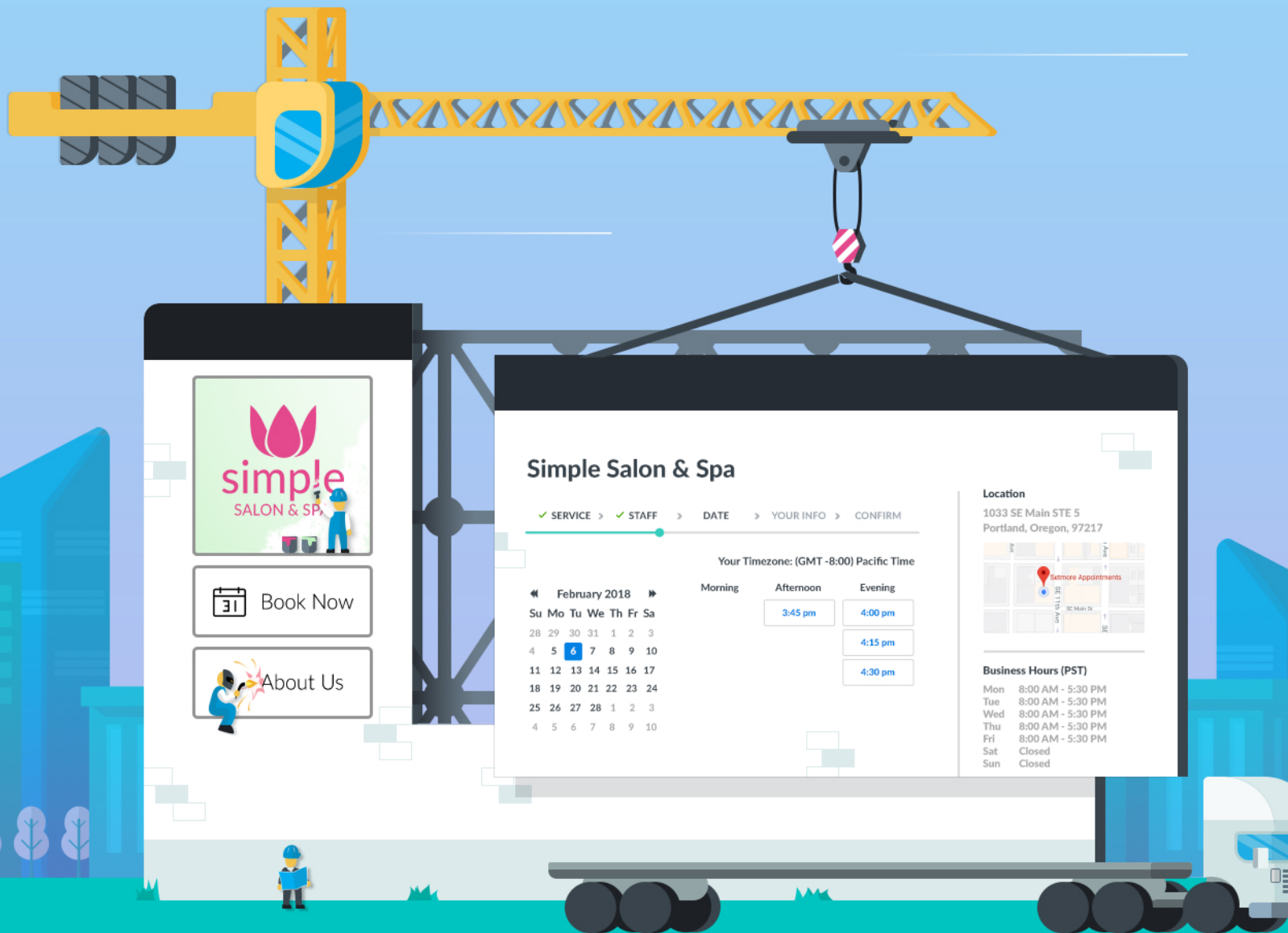


# the Booking Page setup guide



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# What is the Booking Page?

Every Setmore account comes with a free, public Booking Page that lists your staff, services, availability, and contact information. From the Booking Page, customers can self-select the service they want at a time that's convenient for them, and the appointment will appear directly on your Setmore calendar.



## The magic of automated appointments

Imagine the possibilities! Whereas you'd normally have to play phone tag or potentially lose out on new appointments if the customer lands in your voicemail, the Booking Page helps eliminate these hassles. Customers book online whenever they want, even when you're snoozing in bed, and Setmore will even send out automatic notifications to boot.

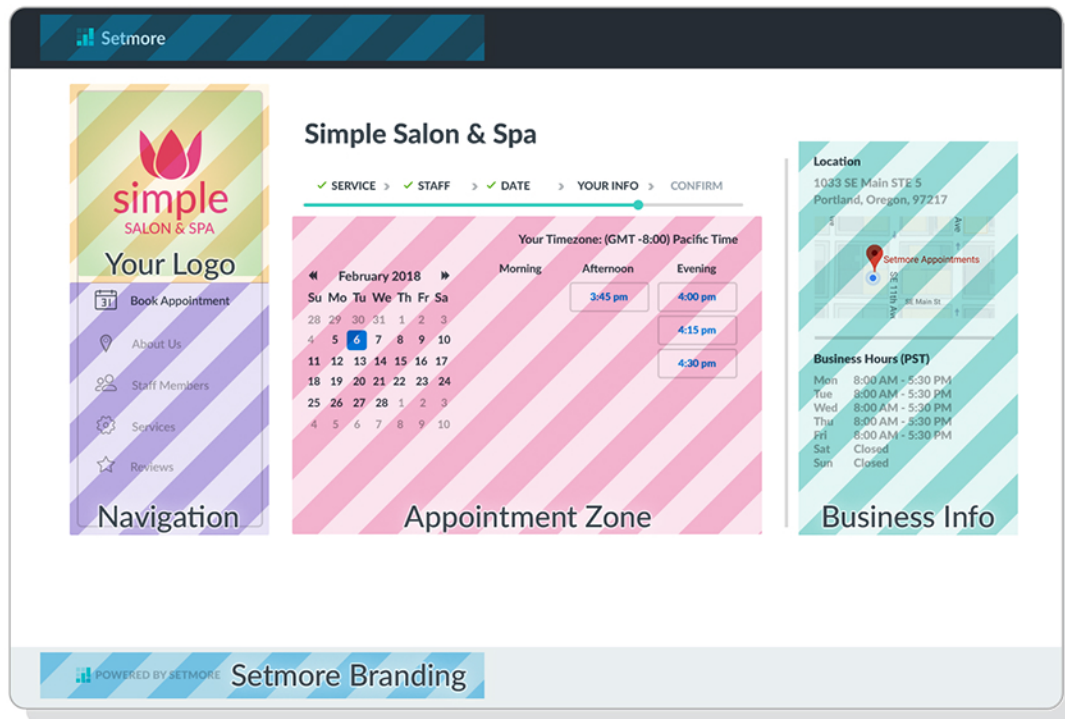
This guide will show you how to set up and get the most value out of your Booking Page. We'll cover the following material over the next few sections:

- Booking Page pieces
- Customizing your Booking Page
- Back-end configurations
- Embedding the Booking Page on your website
- Getting paid from your Booking Page
- Tips for driving customer web traffic

# Booking Page Pieces

Before we get our hands dirty, let's take a look at the different pieces that make up your Booking Page. Note that while you can customize certain elements, you won't be able to change how the Booking Page template looks (such as the background color). But the following pieces are fair game:

**Pro Tip:** The Booking Page will automatically resize based on the customer's device, so they can book appointments from a smartphone easily.



**Your Logo** For best results, the logo image should be square. Horizontal logos should have some blank space above and below.

**Navigation** Appointments, Classes, Services, About, Reviews, and Photos.

**Appointment Zone** Customers choose a service, provider, date/time, add their personal information, and [submit a payment](#) if applicable.

**Business Info** Your website links, business hours, and a Google Maps pin.

**Setmore Branding** You can remove this when you upgrade to [Setmore Premium](#).



# Customizing Your Booking Page

The best Booking Pages will have lots of words and images to both inform and engage your customers visually. You can add a logo and basic business information under [Apps & Integrations > Your Booking Page \(Configure\) > Company Details](#).



- **Customize your .setmore.com URL.** The best URLs are short, sweet, and memorable.
- **Upload your logo.** If you don't have a logo, upload a picture of yourself or your team. Something is better than nothing.
- **Add your contact information.** This will help customers reach you if they need to.

## Configure Your Setmore Booking Page

---

Your Booking Page URL

<http://yourcustomurl.setmore.com> | [Edit URL](#)  
Email, tweet, and share this link with customers.

---

Company Name

This name will appear at the top of your account.

Logo/Photo

Contact Details

This will be your "Reply-To" address for email notifications.

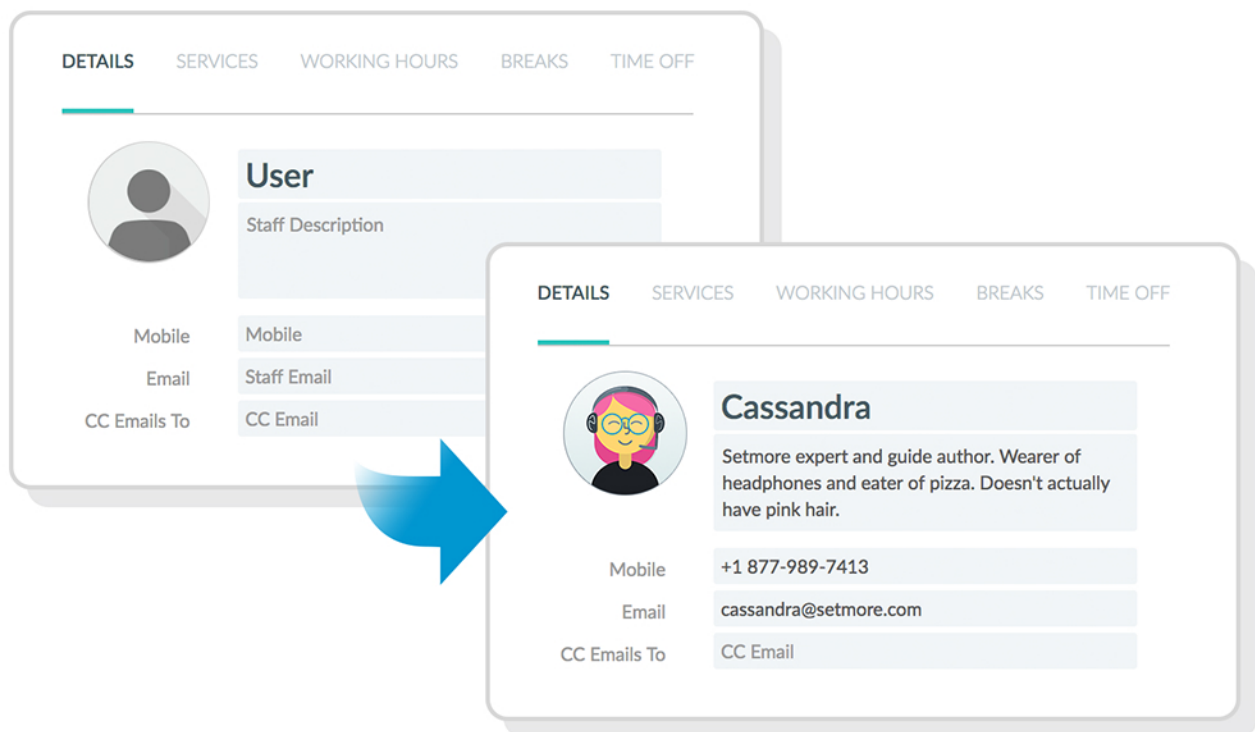
Feel free to explore the rest of the options and add as much information as you're comfortable with. More information is better than less, and serves as a visual cue to your customers that your business is active, accessible, and easy to reach in case something comes up.

## Adding thumbnail images to services and staff

Thumbnails will appear when customers choose a service and a provider. It's important to have pictures here because they create a more inviting experience for your customers, while setting expectations about the quality of services that customers will receive.



1. Upload a thumbnail for your services by going to [Settings > Services](#).
2. Click on any service to bring up it's Details menu.
3. Click on the thumbnail space to upload a new image.
4. Navigate to [Settings > Staff](#) and repeat the process for each of your staff members.



**⚡ Pro Tip:** Available time slots on your Booking Page are determined by your staff working hours, and not your posted business hours. You can adjust staff hours in each staff member's profile under [Settings > Staff > Working Hours](#).

# Back-End Configurations

These back-end options are only visible to you as the Setmore account admin, and they change how your customers book appointments on your Booking Page. You can find these settings under [Apps & Integrations > Your Booking Page \(Configure\) > Booking Policies](#).



### How Clients Book Their Own Appointments Online

---

Appointment Lead Time

How much advance notice do you need before a client books an appointment?

0 Day ▾

1 Hour ▾

0 Minute ▾

---

Booking Slot Size

e.g. 15 min slots will show open slots at 8:00, 8:15, 8:30 etc.

0 Hour ▾

15 Minutes ▾

---

Scheduling Window

How far in advance are customers allowed to book an appointment?

0 Day ▾

1 Month ▾

---

Contact Fields

Select which form fields will show on your booking page.

☒ Phone

☒ Required

☒ Email

☐ Required

☒ Address

☐ Required

**Appointment Lead Time** – How soon before an appointment time the customer may book. One hour or one day works best.

**Booking Slot Size** – How often time slots appear. One-hour slots will create times at 9:00, 10:00, 11:00, and so on. 15 minutes works best here.

**Scheduling Window** – How far out your customers can book an appointment. One to three months works best here.

**Contact Fields** – Add custom form fields to the customer intake form. Add as many as you need; Phone and Email are included by default.

## Back-end configurations (cont.)

**Notes for the Customer** – A customizable pop-up message that customers will see as soon as they land on your Booking Page. Include a custom greeting or instructions as necessary.

**Show Local Time** – Automatically converts available time slots into the customer's time zone. If you treat with customers across different time zones, leave this feature activated.

**Customer Login** – Customers will be prompted to create a username and password before confirming their appointment. This feature helps prevent duplicate customer profiles. We recommend that you turn this feature...

- On/Optional if you have regular customers, as for haircuts or salons.
- Off if you provide one-time services, as for interview scheduling.

**Setmore Branding** – When you upgrade to [Setmore Premium](#), you may remove the Setmore brand elements from your Booking Page by disabling this feature.

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We covered the most important configurations here, but there are dozens of other features in the Booking Policies sub-menu. Feel free to explore on your own.

# Embedding on Your Website

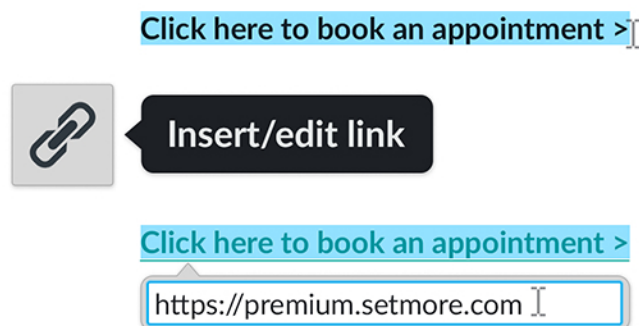
Your website is the first point of contact that most customers have with your business. That's why it's important to connect your website to your Booking Page, to give customers a direct path to book an appointment online, rather than having to call you.



**⚡ Pro Tip:** The best place to put the “Book Appointment” button will be the first screen of your home page (also known as “above-the-fold”).

## Non-technical solution: hyperlinking text or images to your Booking Page

Virtually all blog, website, and social media platforms let you create hyperlinks out of a line of text. This is the easiest way to connect a webpage to your Setmore Booking Page.



1. In Setmore, go to [Apps & Integrations](#) and retrieve your Booking Page URL.
2. In your webpage editor, select a line of text or an image and click the option to “insert/edit link.” It’s usually represented by a “chain links” icon.
3. Paste your Booking Page URL here and save your changes.

## Slightly more technical: using a website builder

Most website builders will have an <HTML/Embed> widget that you can drag and drop on your webpage.



1. In Setmore, go to [Apps & Integrations > Booking Widget](#).
2. Fill out the options for 1-3, then select "I'll embed the code myself" and copy all the code there.
3. In your website builder, drag and drop the <HTML/Embed> widget onto your webpage. Open the details menu for the <HTML/Embed> widget.
4. When prompted to enter the HTML, paste the code that you copied in Step 2 and save your changes.



## Officially technical: making direct edits to your website's HTML

If you have access to your website's HTML, this is probably the most expedient route.

```

92
93
94 <!-- Insert Setmore Booking Page code here -->
95
96 <h2 class="body-align-left">BOOK A CONSULTATION</h2>
97 <script id="setmore_script" type="text/javascript"
  src="https://my.setmore.com/webapp/js/src/others/
  setmore_iframe.js"></script><a id="Setmore_button_
  iframe" style="float:none" href="https://my.setmore.
  com/bookingpage/c788c511a9be207175935f3b4b622"></a>
98
99 <!-- Insert Setmore Booking Page code above -->
100
101

```

1. Go to [Apps & Integrations > Booking Widget](#).
2. Fill out the options for 1-3, then select "I'll embed the code myself" and copy all the code there.
3. Open the HTML file of the webpage to which you'd like to add the Book Appointment button. Paste the code where you want the button to appear.
4. Save the file to your server and you're done!

# Get Paid from Your Booking Page

With an active payment integration, your customers can pay for their appointments upfront via your Booking Page, using a debit or credit card. Any payments submitted this way will appear in the Appointment Details menu for each appointment on your Setmore Calendar.

**Simple Salon & Spa**

✓ SERVICE > ✓ STAFF > ✓ DATE > YOUR INFO > CONFIRM

Enter Your Payment Details

Registration ends in 04:54 mins

Location: 1033 SE Main STE 5, Portland, Oregon, 97217

**PROVIDER:** Michael

**DATE & TIME:** Thu, 21 Jun 2018 at 8:00 am (GMT +00:00)

SERVICES		
Long Haircut	\$35.00	
Color	\$120.00	
Styling	\$15.00	
<b>Total Amount</b>	<b>\$170.00</b>	

**Pay and Book Appointment**

VISA, Mastercard, American Express, Discover

**PROVIDER:** Michael

**DATE & TIME:** Thu, 21 Jun 2018 at 8:00 am (GMT +00:00)

SERVICES		
Long Haircut	\$35.00	
Color	\$120.00	
Styling	\$15.00	
<b>Total Amount</b>	<b>\$170.00</b>	

**Pay and Book Appointment**

VISA, Mastercard, American Express, Discover

This is a great way to get a firm commitment from your customers, while getting payment out of the way so that you can focus on your customer at the time of service.

**⚡ Pro Tip:** Setting up a payment integration requires your own Square or Stripe account. Click for more information.

<https://www.setmore.com/features/payments>

# Tips for Driving Customer Traffic

The more avenues that you provide your customers for discovering your public Booking Page, the better the odds that they'll book an appointment. Below we've included some recommendations for how and where to promote your Booking Page.

- **Email Signature** – Add a link to “Book an appointment with me” to your email signature and link it to your Booking Page.
- **Social Media** – Add links to your Booking Page in all of your social media profiles.
- **Regular Posts** – Make regular postings on your social media accounts that promote your Setmore availability, a few times per week or per month.
- **Print Materials** – Include links to book an appointment on any print materials you have, such as brochures and business cards.

Taking these steps will help bring more customers to your Booking Page, earn you more appointments, and help you build a base of returning customers.

# What's Next?

## Watch tutorial videos on Setmore YouTube

Each video is approximately 1 min. for quick, rapid-fire learning. Cruise through a variety of topics and see how each feature is set up in real time.

<https://www.youtube.com/user/setmoreappointments>

## Explore the Setmore support database

Browse over 100 articles on everything Setmore. Each article offers step-by-step instructions, screenshots, and the occasional video.

<https://support.setmore.com>

## Message a Setmore expert directly

From our support website, click the chat bubble in the lower right corner to start a 1:1 live chat with a Setmore expert. We're available 24/7.

## Sign up for a free account

The best way to get to know Setmore is to try it for yourself. Create an account and book your first appointment in minutes, no credit card required.

<https://www.setmore.com/start-now>



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Like this guide? Share it.

