

# Online Booking

## An overview of Envision Online Booking

### Online Booking

Envision online booking is available for all editions of Envision Cloud

### General Options

The screenshot shows the Envision Cloud interface. At the top is a navigation bar with the Envision Cloud logo and menu items: Schedule, Sales, Medical, Marketing, Clients, Employee, Inventory, and Reports. Below this is the 'Company Settings' section, which includes a 'Save Settings' button with a green checkmark. A sidebar on the left lists various settings categories: Company Info, General Options, Tax Setup, POS Options, Credit Card Integration, Schedule Options, Online Booking (highlighted), Appt Reminder, Memberships, Security Options, Support, and Other. The main content area is titled 'General Options' and contains several settings: 'Enable online booking' (checked), 'Hide service prices' (unchecked), and 'Disable new client registrations' (unchecked). There is a text input field for 'Google Analytics Id', a dropdown for 'Employee Name Format' (set to 'First / Last'), and color pickers for 'Font Color' (red) and 'Button Color' (blue). Below these is the 'Online Booking URL (Cannot be changed later):' with the value 'www.envisiongo.com/a/MEDICALSPADEMO'. The 'Header Image' section shows a preview of the Envision Cloud logo on a blue background, with a file upload area containing a 'File:' input, a 'Select' button, and 'Upload Image Now' and 'Clear Image' buttons. A note at the bottom states 'Max file size 3 MB (recommended under 500k)'.

### Customize Online Booking

Change these options to change your Online Booking look!

Font Color



Button Color



## Select Appointment Options

Select Location:

Em Elle Dee's Studio | Studio, FL (main)

Select a Service:

Basic Facial

Select a Provider:

First Available Female

Week Of:

01/22/2021



Show Available Times

Select From Available Slots:



Fri Jan 22	Sat Jan 23	Sun Jan 24	Mon Jan 25	Tue Jan 26	Wed Jan 27	Thu Jan 28
	08:00 AM					
	08:15 AM					
		08:30 AM				
		08:45 AM				
	09:00 AM	09:00 AM	09:00 AM			09:00 AM
			09:15 AM			09:15 AM
	09:30 AM	09:30 AM		09:30 AM		09:30 AM
		09:45 AM		09:45 AM		09:45 AM
		10:00 AM				
	10:15 AM		10:15 AM	10:15 AM	10:15 AM	10:15 AM

### Enable Online Booking

Check this box to enable booking online by clients.

### Hide Service Prices

Select this option to not display service pricing on the online booking page.

### Disable new client registrations

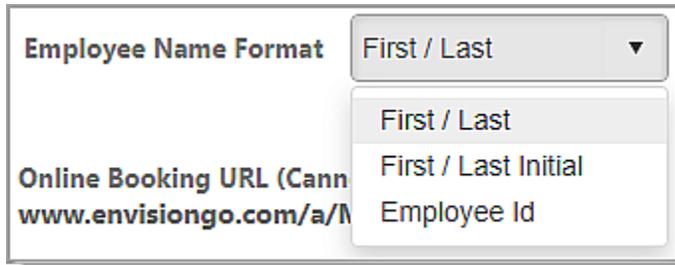
Check this box to only allow clients with an email address on file to book appointments.

## Google Analytics ID

By entering your google analytics ID, you can track online booked appointments.

## Employee Name Format

This is how your employee's names will be formatted on the online booking screen when a client books an appointment.



The image shows a screenshot of a web form. On the left, there is a label "Employee Name Format" and a text input field containing "www.envisiongo.com/a/". To the right of the input field is a dropdown menu. The dropdown menu is currently open, showing four options: "First / Last", "First / Last Initial", and "Employee Id". The "First / Last" option is currently selected and highlighted.

## Online Booking URL

Input the desired URL (website link) name for your business.

*Important Note: Once you submit a URL name, you CANNOT change it later. Please verify the spelling of your selected URL name before registering your URL.*

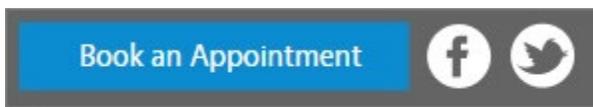
## Contact Options

### Send email to employee/salon after appointment booked.

Select from these options if you would like an email to be sent to the employee booked or the business when an appointment is booked online.

### Link to your company Facebook/ Twitter page

Input your company Facebook and Twitter page links and the corresponding image will show and be linked on your online booking web page.



### Email address for online booking notices

By default, the email address that is displayed on your web page for clients to contact is the email used under the General tab in the Company Settings. If you wish to have an alternate email display on your page, enter it into this field.

# Booking Options

The screenshot shows the 'Company Settings' interface for Envizion Cloud. The top navigation bar includes 'Schedule', 'Sales', 'Marketing', 'Clients', 'Employee', 'Inventory', and 'Reports'. The 'Company Settings' page has a 'Save Settings' button with a green checkmark. The left sidebar lists various settings categories: Company Info, General Options, Tax Setup, POS Options, Credit Card Integration, Schedule Options, Online Booking (highlighted), Appt Reminder, Memberships, Security Options, Support, and Other. The 'Booking Options' tab is active, showing the following settings:

- Request Only (will NOT book into schedule automatically)
- Override calendar settings and use the employee work schedule for online booking
- Only allow booking on the hour
- Disable first available employee
- Disable first available male/female
- Store credit card on file before completing booking

Deposit Method: No Deposit Required (dropdown menu)

Deposit Amount: 0.00 (input field)

Hours before appointment where online cancellation is not allowed: 0 (input field)

Lead hours before booking is allowed: 0 (input field)

Appointment selection format: Display Full Week (dropdown menu)

## Request Only

Select this option if you want the booking page to function as a booking request system. This will disable the real-time booking, and not show any requested appointments on the appointment calendar. An email will be generated and sent to the business's email address to alert you of the requested appointments.

## Override Calendar Settings and Use The Employee Work Schedule For Online Booking

This option forces clients booking appointments online to use the employee work schedule when looking for availability. This option is useful if you want your employees to be able to book appointments during their off-hours, but you don't want clients to be able to do so.

## Only allow booking on the hour

Choosing this option will only allow appointments to be booked on the whole hour (9:00 am, 12:00 pm, etc.)

### **Disable first available employee/Disable first available male/female**

Check this box if it DOES matter which employee is the first available for online booking. If you have a certain rotation for booking or routine, then this box is helpful.

### **Store credit card on file before completing booking**

Check this box to require a client to enter a credit card to book appointments online. Cards are now pre-authorized for \$1 when a client puts a credit card on file for online booking, to ensure the card is valid and has an available balance.

*Important Note: This option does not apply if the appointment is made with Reserve with Google. If a client is able to book an appointment without providing a card and you have the store credit card feature enabled, ensure Reserve with Google is not enabled as it does not require a card to be saved on file upon booking.*

*Holding Credit Cards on File is available in the Preferred & Ultimate versions of Envision Cloud and requires integrated credit card processing. To upgrade, please contact our Sales Team at 800.231.9445 or [sales@ennoview.com](mailto:sales@ennoview.com).*

### **Opt Out of 'Reserve With Google' Bookings**

Check this box to not allow clients to reserve directly from your business's Google information page.

### **Deposit Method**

This is where you can choose whether to require a deposit for an appointment. If you choose to require a deposit, you can either require a flat amount or percentage of the service booked.

Deposit Method:	No Deposit Required	▼
Deposit Amount:	No Deposit Required	
	Flat Amount Daily	
Hours before appo	Percent of First Service Daily	all

### **Deposit Amount**

If a deposit is required, you would either enter the dollar amount of the flat amount deposit or the percentage of the service for the deposit.

*Deposit in Online Booking is available in the Ultimate version of Envision Cloud and requires integrated credit card processing. To upgrade, please contact our Sales Team at 800.231.9445 or sales@ennoview.com.*

### **Hours Before Appointment Where Online Cancellation Is Not Allowed**

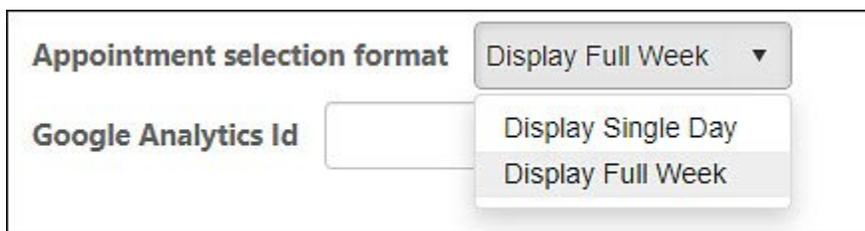
Enter the number of hours prior to appointments that clients are able to cancel from Reserve with Google. For example, if 2 is entered here, clients will be able to cancel an appointment up until 2 hours prior to the appointment time. This also applies to online booking through the Custom Mobile App with Envision Cloud.

### **Lead Hours before booking is allowed**

Enter the number of hours after which clients may book appointments. For example, if 12 is entered into the field, then clients must choose appointment times that are 12 hours in advance of when they are submitting the booking. If left at 0, there will be no lead time and clients may book the very next open time slot.

### **Appointment Selection Format**

This is where you can choose how you want clients to see your availability. You can either display the full week or a single day at a time.



The screenshot shows a settings panel with two rows. The first row is labeled "Appointment selection format" and has a dropdown menu currently set to "Display Full Week". The second row is labeled "Google Analytics Id" and has an empty text input field. A dropdown menu is open over the input field, showing two options: "Display Single Day" and "Display Full Week".

### **Custom Text**

#### **Booking Terms**

Booking terms can now be set and can be required to be agreed to in order for clients to book online. This option allows your business to write and communicate terms to clients and require acceptance of these terms to finalize their online booking. The Terms Page is its own page in the online booking process after a date is selected. If this setting is enabled, the client ID, date, time, and IP address of the person accepting the terms will be recorded and saved in Envision Cloud. Clients will have to reaccept the terms every time they book an appointment online. Salon booking/gift card sites will have a link to "Terms and Conditions" so clients can review on future visits. Terms can also be printed from the client profile.

## Company Settings

Save Settings

- Company Info
- General Options
- Tax Setup
- POS Options
- Credit Card Integration
- Schedule Options
- Online Booking**
- Appt Reminder
- Memberships
- Security Options
- Support
- Other

- General Options
- Contact Options
- Booking Options
- Custom Text**
- Integration Options

- Booking Terms**
- Welcome Text
- Service List
- Booking Email
- CC Terms
- Privacy Policy

Require user to agree to terms before booking online

### Booking Terms:

48 hour cancellation policy

## Welcome Text

Here you can customize the text that will be displayed on your online booking web page.

### Company Settings

Save Settings ✓

- Company Info
- General Options
- Tax Setup
- POS Options
- Credit Card Integration
- Schedule Options
- Online Booking
- Appt Reminder
- Memberships
- Security Options
- Support
- Other

- General Options
- Contact Options
- Booking Options
- Custom Text
- Integration Options
- Booking Terms
- Welcome Text
- Service List
- Booking Email
- CC Terms
- Privacy Policy

#### Welcome Text:

**At Apaindegia, we believe that every person deserves beauty!**

Come experience our tranquil spa with soothing massages and relaxing facials.

Our highly-trained stylists would love to flatter your face with a custom hair style.

Ask our nail technicians about our invigorating caffeinated coffee hand and foot scrub!

**Be You....**

**.....Beautiful!**

### Service List Custom Text

If you wish to not show a list of all services enabled for online booking, you may enter custom text here. To show all services enabled for online booking, leave this blank.

Company Settings

Save Settings

- Company Info
- General Options
- Tax Setup
- POS Options
- Credit Card Integration
- Schedule Options
- Online Booking
- Appt Reminder
- Memberships
- Security Options
- Support
- Other

- General Options
- Contact Options
- Booking Options
- Custom Text
- Integration Options

- Booking Terms
- Welcome Text
- Service List
- Booking Email
- CC Terms
- Privacy Policy

Service List Custom Text (Leave blank to show all services):

## Booking Email

### Customer Confirmation Email Subject

Enter a subject line for the email. It is recommended to include the company name.

### Customer Confirmation Email Text

Enter the text for the body of the email. Using the Merge Fields dropdown selection to the right will allow the system to enter information specific to the booking client.

## Company Settings

Save Settings

- Company Info
- General Options
- Tax Setup
- POS Options
- Credit Card Integration
- Schedule Options
- Online Booking
- Appt Reminder
- Memberships
- Security Options
- Support
- Other

- General Options
- Contact Options
- Booking Options
- Custom Text
- Integration Options
- Booking Terms
- Welcome Text
- Service List
- Booking Email
- CC Terms
- Privacy Policy

Customer Confirmation Email Subject

### Customer Confirmation Email Text

{FirstName},

We appreciate the opportunity to meet and exceed your beauty needs. Your appointment has been booked!

**Date: {Appointment Date}**

**Time: {Appointment Time}**

**Services: {Services}**

You will receive an email confirmation 3 days prior to your scheduled appointment. You may click the link in that email to confirm your appointment. If you need to reschedule please reach us at (212) 555-1212.

We require 24 hour notice of rescheduling or cancellation to avoid a cancellation fee.

## CC Terms

Enter the text of your CC terms. Clients will be able to read this upon booking an appointment.

# Company Settings

Save Settings

- Company Info
- General Options
- Tax Setup
- POS Options
- Credit Card Integration
- Schedule Options
- Online Booking**
- Appt Reminder
- Memberships
- Security Options
- Support
- Other

- General Options
- Contact Options
- Booking Options
- Custom Text**
- Integration Options
- Booking Terms
- Welcome Text
- Service List
- Booking Email
- CC Terms
- Privacy Policy

Enter your terms for credit card booking requirements:

Empty text area for entering terms for credit card booking requirements.

## Privacy Policy

Enter the text of your privacy policy. Clients will be able to read this upon booking an appointment.

## Company Settings

Save Settings 

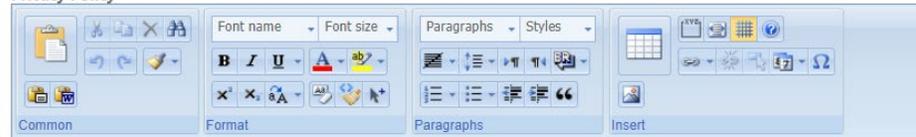
-  Company Info
-  General Options
-  Tax Setup
-  POS Options
-  Credit Card Integration
-  Schedule Options
-  Online Booking
-  Appt Reminder
-  Memberships
-  Security Options
-  Support
-  Other

General Options    Contact Options    Booking Options    **Custom Text**    Integration Options

Booking Terms    Welcome Text    Service List    Booking Email    CC Terms    **Privacy Policy**

This is a direct link to display your policy: [Privacy Policy](#)

### Privacy Policy



hello

## Integration

Online booking integration options are used when you wish to integrate the functionality of booking appointments onto other sites like Facebook or your existing web site. You may also use options on this page to customize or update your MyDash information if subscribed.

The screenshot shows the 'Company Settings' interface in Envision Cloud. At the top, there is a navigation bar with the Envision Cloud logo and several menu items: Schedule, Sales, Medical, Marketing, Clients, Employee, Inventory, and Reports. Below this is the 'Company Settings' header with a 'Save Settings' button. A sidebar on the left lists various settings categories, with 'Online Booking' selected. The main content area is titled 'Integration Options' and contains three sections:

- Facebook App:** A dashed box containing the text: "Add the Online Booking Facebook App to your page now."
- Online Gift Sales & MyDash Admin Panel:** A dashed box containing the text: "Visit to update your options."
- To add online booking to an existing website, add the following code to your site:** A dashed box containing the following HTML code:
 

```
<iframe id='frameBooking'
src='https://envisiongo.com/a/YOURSITE/OnlineBookingFrame.aspx'
frameborder='0' allowTransparency='true'></iframe>
```

### Facebook App

Clicking this will guide you through the steps to enable your clients to book appointments directly from your company's Facebook page without ever having to leave Facebook.

### MyDash Administration Panel

If you have signed up for the MyDash customer booking app, you will be able to customize the app options by selecting the provided link.

### Integration for Existing Websites

The HTML code provided can be put into an existing site to allow iFrame integration for clients to book appointments online from your existing site.