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How do you set up online booking?

Everything you need to know about setting up your online booking



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Updated over a week ago

Firstly, ensure that your locations are switched on to display in Online booking. Click "Settings" at the top, then click "Locations" and enter the location you want to appear online and make sure the field below is ticked "Yes". Click "Save":

The screenshot shows the Heydoc web application interface. At the top is a dark blue navigation bar with the Heydoc logo and a plus icon, followed by menu items: Appointments, Patients, Tasks, Labs, Letters, Invoices, Products, Contacts, Analytics, and Settings. On the left is a light grey sidebar with links: Integrations, Questionnaires, and Account security. The main content area has a light blue header for the 'Locations' section. Below this, there's a text box containing the address: 'Brainspace Surgery, 95 Thomas More Street, London, E1W 1D'. Underneath the address box is a section titled 'Online booking'. Inside this section, the text 'Display in online booking' is followed by a toggle switch. The toggle is currently set to 'Yes' and is circled in red. Below the 'Online booking' section is another section titled 'Services provided' with a link 'Select all'. This section contains a list of services with checkboxes: 'Adults (half hour)', 'Adults (one hour)', 'Children', 'Home visit (day)', 'Home visit (night)', 'Telephone consultation', 'Adults (10 mins)', and 'Video Consultation'. All checkboxes are currently checked.

You will also have to select the services provided by each location:

Heydoc + Appointments Patients Tasks Labs Letters Invoices Products Contacts Analytics Settings

Online booking

Display in online booking

Yes

Services provided [Select all](#)

- ☒ Adults (half hour)
- ☒ Adults (one hour)
- ☒ Children
- ☒ Home visit (day)
- ☒ Home visit (night)
- ☒ Telephone consultation
- ☒ Adults (10 mins)
- ☒ Video Consultation
- ☒ Travel Vaccination
- ☒ Blood Test

Cancel Save Delete

Next, click "Users" and click the user you want to appear in your online booking and make sure this field below is toggled "Yes":

Heydoc + Appointments Patients Tasks Labs Letters Invoices Products Contacts Analytics Settings

☒ Travel Vaccination

☒ Blood Test

Online booking

Display in online booking

Yes

Notification settings

Receive notification when task is assigned to you

Yes

Receive notification when task assigned to you is updated

Yes

Receive notification when lab results are received ?

Yes

Receive notification when booking has been made

Yes

You will also have to select the services provided by each user so that only relevant appointment types can be booked with each practitioner:

The screenshot shows the 'Settings' page in the Heydoc application. The top navigation bar includes 'Heydoc', a plus icon, and links to 'Appointments', 'Patients', 'Tasks', 'Labs', 'Letters', 'Invoices', 'Products', 'Contacts', 'Analytics', and 'Settings'. The 'Settings' page has a sidebar on the left. The main content area is divided into two sections: 'Services provided' and 'Online booking'. The 'Services provided' section has a link 'Select all' and a list of services with checkboxes: 'Adults (half hour)', 'Adults (one hour)', 'Children', 'Home visit (day)', 'Home visit (night)', 'Telephone consultation', 'Adults (10 mins)', 'Video Consultation', 'Travel Vaccination', and 'Blood Test'. All checkboxes are checked. The 'Online booking' section has a heading 'Online booking' and a sub-section 'Display in online booking' with a 'Yes' toggle switch that is turned on.

Now go to "Products", select the bookable product and click the edit button as below:

The screenshot shows the 'Products' page in the Heydoc application. The top navigation bar includes 'Heydoc', a plus icon, and links to 'Appointments', 'Patients', 'Tasks', 'Labs', 'Letters', 'Invoices', 'Products', 'Contacts', 'Analytics', and 'Settings'. The 'Products' page has a sidebar on the left. The main content area shows the details for the 'ADULTS (10 MINS)' product. The product is categorized as 'APPOINTMENT'. It has a duration of 10 minutes and a green color swatch. The product can be booked in the calendar. The product details table is as follows:

This product can be booked in the calendar	
Duration (mins)	10
Colour	
Is video consultation	No
Show in online booking	Yes
Requires payment	Yes
Requires confirmation	No
Price	£100.00
Contracts	
BUPA	£ 50

An edit button (pencil icon) is circled in red in the top right corner of the product details section.

Select the tick box "Show in online booking" and click "Save":

Heydoc + Appointments Patients Tasks Labs Letters Invoices **Products** Contacts Analytics Settings Charlotte Tidd ▾

Adults (10 mins)

< Save

Product

Type	Name	Price (£)
Appointment ▾	Adults (10 mins)	100

☒ This product can be booked in the calendar

Booking options

Duration (mins)

10

Colour

☐ Is video consultation

☒ Show in online booking

☒ Requires payment

☐ Requires confirmation

Now click "Online booking". Use the fields in the "URL generator" section to customise your URL/iframe code:

Heydoc + Appointments Patients Tasks Labs Letters Invoices Products Contacts Analytics **Settings** Charlotte Tidd ▾

General
Availability
Locations
Users
Roles
Appointment types
Medical settings
Lab settings
Online booking
Appointment reminder
Patient settings
Invoice settings
Letter templates
Consultation templates
Integrations
Questionnaires
Account security

Save

Activation

☒ Active

Appointment types ▾ Locations ▾ Practitioners ? ▾

Online booking url `https://online-booking.heydoc.co.uk/?token=6560738f231b7ada8ce08d6336bf1dec` Embedded iframe code `<iframe src=https://online-booking.heydoc.co.uk/?token=6560738f231b7ada8ce08c`

General settings

Minimum notice for booking ? ▾ None ▾ Minimum notice for cancellations ? ▾ 48 hours ▾

Frequency of bookings (every x minutes) ? ▾ 30 ▾ Number of weeks displayed to patient ? ▾ 6 ▾

Redirect link (for booking cancellation) ? `https://online-booking.heydoc.co.uk/?token=6560738f231b7ada8ce08d6336bf1dec262aa7bf`

Default appointment type ?

You can then generate different URLs and iframe codes as circled below:

Heydoc + Appointments Patients Tasks Labs Letters Invoices Products Contacts Analytics Settings Charlotte Tidd

General
Availability
Locations
Users
Roles
Appointment types
Medical settings
Lab settings
Online booking
Appointment reminder
Patient settings
Invoice settings
Letter templates
Consultation templates
Integrations
Questionnaires
Account security

Save

Activation

☒ Active

Appointment types: Select... Locations: Select... Practitioners: Select...

Online booking url: <https://online-booking.heydoc.co.uk/?token=6560738f231b7ada8ce08d6336bf1dec>

Embedded iframe code: `<iframe src=https://online-booking.heydoc.co.uk/?token=6560738f231b7ada8ce08c`

General settings

Minimum notice for booking: None Minimum notice for cancellations: 48 hours

Frequency of bookings (every x minutes): 30 Number of weeks displayed to patient: 6

Redirect link (for booking cancellation): <https://online-booking.heydoc.co.uk/?token=6560738f231b7ada8ce08d6336bf1dec262aa7bf>

Default appointment type: All appointment types

Confirmation text (displayed in browser): Thank you for booking with Heydoc Surgeries. We look forward to seeing you at your appointment.

Patient disclosure: None of your data will be passed onto third parties.

☒ Hide Saturday / Sunday ☐ Force the patient to select a location

Fill in the "General settings". Each point is explained directly on the page by clicking the blue "?" icon near the title:

Heydoc + Appointments Patients Tasks Labs Letters Invoices Products Contacts Analytics Settings Charlotte Tidd

Invoice settings
Letter templates
Consultation templates
Integrations
Questionnaires
Account security

Save

General settings

Minimum notice for booking: None Minimum notice for cancellations: 48 hours

Frequency of bookings (every x minutes): 30 Number of weeks displayed to patient: 6

Redirect link (for booking cancellation): <https://online-booking.heydoc.co.uk/?token=6560738f231b7ada8ce08d6336bf1dec262aa7bf>

Default appointment type: All appointment types

Confirmation text (displayed in browser): Thank you for booking with Heydoc Surgeries. We look forward to seeing you at your appointment.

Patient disclosure: None of your data will be passed onto third parties.

☒ Hide Saturday / Sunday ☐ Force the patient to select a location

To allow practitioners to be booked online you need to make sure the field below is ticked:

The screenshot shows the 'Settings' page in the Heydoc interface. The 'Book practitioner' option is circled in red. The page includes sections for Confirmation text, Patient disclosure, Patient form settings, Book practitioner, Custom questions, and Privacy Policy.

Heydoc + Appointments Patients Tasks Labs Letters Invoices Products Contacts Analytics **Settings** Charlotte Tidd ▾

Save

Confirmation text (displayed in browser) ⓘ

Thank you for booking with Heydoc Surgeries. We look forward to seeing you at your appointment.

Patient disclosure ⓘ

None of your data will be passed onto third parties.

☒ Hide Saturday / Sunday ☐ Force the patient to select a location

Patient form settings

☒ Hide confirmation email ☐ Hide gender ☐ Hide date of birth
☒ Hide phone ☐ Hide comments ☒ Hide address

Book practitioner

☒ Allow patients to book with a specific practitioner

Custom questions

Add question

Privacy Policy Required
Please click to ensure you agree to our privacy policy www.heydoc.co.uk ...

You can also add a tick box to your online booking by clicking the blue "Add question" button:

The screenshot shows the 'Settings' page in the Heydoc interface. The 'Add question' button is circled in red. The page includes sections for Confirmation text, Patient disclosure, Patient form settings, Book practitioner, Custom questions, and Privacy Policy.

Heydoc + Appointments Patients Tasks Labs Letters Invoices Products Contacts Analytics **Settings** Charlotte Tidd ▾

Save

Confirmation text (displayed in browser) ⓘ

Thank you for booking with Heydoc Surgeries. We look forward to seeing you at your appointment.

Patient disclosure ⓘ

None of your data will be passed onto third parties.

☒ Hide Saturday / Sunday ☐ Force the patient to select a location

Patient form settings

☒ Hide confirmation email ☐ Hide gender ☐ Hide date of birth
☒ Hide phone ☐ Hide comments ☒ Hide address

Book practitioner

☒ Allow patients to book with a specific practitioner

Custom questions

Add question

Privacy Policy Required
Please click to ensure you agree to our privacy policy www.heydoc.co.uk ...

This will bring up the following page. Enter the title and the question or statement text. If you want to make the tick box compulsory for a patient to make a booking, ensure that 'Required' is ticked:

Custom questions

Add question

Title

Text

☐ Required

Privacy Policy

Required

Please click to ensure you agree to our privacy policy www.heydoc.co.uk

Once you've inserted your URL into the backend of your website you should see a booking portal similar to the one below, the prospective patient will be able to choose the type of appointment, the practitioner and the time/date according to what is available:

Book an appointment

Adults (10 mins)

Any location

Any practitioner

<

MON
Sep 9

TUE
Sep 10

WED
Sep 11

>

17:00	09:00	09:00
17:15	09:15	09:15
17:30	09:30	09:45
17:45	09:45	10:00
—	more	more

Did this answer your question?



 We run on Intercom