

How to Setup Online Booking and Payment

practiceQ offers a simple and affordable appointment management solution which includes an online scheduling widget, payment processing and appointment reminders ([//support.intakeq.com/appointment-reminders/](https://support.intakeq.com/appointment-reminders/)).

What is a Booking Widget and How Does it Work?

A booking widget is a self-contained application that you can place anywhere on your website to enable your visitors to book appointments with you.

It works by copying and pasting a piece of code into one of your website pages. But before you do that, you need to set up what the widget will display, such as what services you offer, what times you are available, how customers will pay you, etc.

This guide will show you how to set up your booking widget and how to get the code that you need to paste in your website.

1. Go to Your Booking Settings

1. Click on the **"Bookings"** main menu item.
2. Click on the **"Bookings Settings"** button in the upper right corner of the screen.

On the settings screen you'll see multiple tabs. Let's go through each one of them and fill out the needed information.

2. Setup Your Locations and Hours of Operation

practiceQ supports multiple locations, so in case you work at different clinics, you can set the hours and services separately for each location. When you first open the booking settings, you'll see that a location was added by default. All you have to do is to enter the address and hours of operation, as you can see below.

Hours/Locations

Services

Payments

Settings

Sync

Emails

Preview

Widget

Office

105 Greenwich St, New York

Location Name

Office

Address

105 Greenwich St, New York

105 Greenwich St, New York, NY, United States

105 Greenwich St, Montauk, New York, United States

105 Greenwich Avenue New York, NY, United States

105 North Greenwich Street, Montauk, New York, United States

105 Greenwich St Hempstead, New York, United States

Practitioners

Select the practitioners working in this location:

☒ Melissa Tilley (Add Bio)

☒ Sarah Spencer (Add Bio)

Start typing the address and Google maps autocomplete will kick in.

Hours of Operation

+ Add Alternative Hours

Sunday	9:00 AM	5:00 PM	<input checked="" type="checkbox"/> Closed
Monday	9:00 AM	5:00 PM	<input type="checkbox"/> Closed
Tuesday	9:00 AM	5:00 PM	<input checked="" type="checkbox"/> Closed
Wednesday	9:00 AM	2:45 PM	<input type="checkbox"/> Closed
Thursday	9:00 AM	5:00 PM	<input type="checkbox"/> Closed
Friday	9:00 AM	3:00 PM	<input type="checkbox"/> Closed
Saturday	9:00 AM	5:00 PM	<input checked="" type="checkbox"/> Closed

Setting up the hours for a location

In case you have more than one location, click on **"Add Location"** and repeat the same process.

3. Setup Your Services

The next thing you'll do is to enter the services you offer. Clicking on **"Add Service"** will open a form where you can enter the details of a service.

Basic Info

Form

Overrides

Advanced

Service Name:

Initial Consultation

Service Description:

The purpose of the initial consultation is to get a feel for whether we can do therapeutic work together.

Session Duration:

90 minutes

Price:

200

☐ Hide

Practitioners:

☒ Melissa Tilley

☐ Tara Peron

☒ Sarah Spencer

Cancel

Save

These fields are self-explanatory, but pay special attention to the **"Form"** tab. This is where you tell practiceQ which intake form (if any) you want your client to receive once he/she books this service.

Once you set up your services, you can always go back to edit or delete them.

Hours/Locations

Services

Payments

Settings

Sync

Emails

Preview

Widget

Manage Your Services

+ Add Service

Categories

Coupons

Name	Description	Duration	Price			
Initial Consultation	The purpose of the initial consultation is to get ...	90 minutes	\$200.00	Edit	X	^ v
Follow Up	Select this only if you had your initial visit alr ...	45 minutes	\$100.00	Edit	X	^ v
Skype Consultation	If you're not in New York, we can still work toget ...	45 minutes	\$50.00	Edit	X	^ v

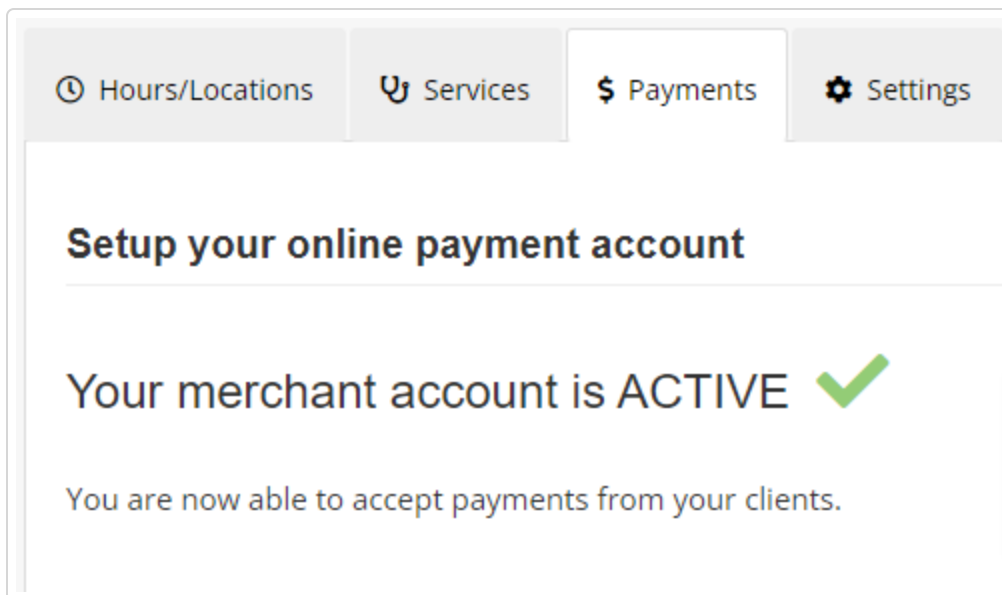
4. Connect practiceQ to a Payment Provider (*optional*)

If you want to receive online credit card payments from your clients, you need to connect your practiceQ account to a Payment Provider. If you don't want to receive online payments, skip to the next section.

See the following article for the payment providers we integrate with depending on your location: Supported Payment Providers ([//support.intakeq.com/article/105-what-payment-providers-does-intakeq-support](https://support.intakeq.com/article/105-what-payment-providers-does-intakeq-support))

They all offer an easy way for businesses to accept credit card payments online. They are free to set up and you're charged a fee on every transaction, just like any credit card provider.

Connecting with a payment provider is simple. Under the **"Payments"** tab, select the payment provider you will use and follow the instructions. Assuming everything goes smoothly, you will be redirected back to practiceQ and you should see a success message in the **"Payments"** tab.



There are a couple of payment options you should set up here, as shown below.

Payment Settings

Payment Settings

Require Credit Card When Booking?

Make credit card optional

Automatic charge:

Charge client on the day of the appointment

**This setting is for appointments only. Packages will always be charged upfront when credit card is informed.*

This section will impact the scheduling workflow. You can require a credit card number, make it optional, or not ask for a credit card.

You can also choose what to do when a credit card is provided in the **"Automatic Charge"** field. The default setting will charge the client's credit card a few hours before the appointment, but you can choose to charge the card immediately upon booking or to not charge the client automatically at all.

Cancellation Policy

This is where you determine when your client can cancel the appointment without paying a cancellation fee and how much their credit card will be charged if they cancel irresponsibly.

IMPORTANT: Please note that if you manually cancel an appointment for a client, you'd need to manually issue an invoice if you want them to be charged. The automatic charge only works if the client cancels the appointment themselves and had a credit card on file when the appointment was scheduled.

Payment Settings

Payment Options

Require a credit card

The client's credit card will be charged automatically on the day of the appointment.

Cancellation Policy

If a client cancels within hours of the appointment, charge a % cancellation fee.

The cancellation fee will only be charged automatically if the client has provided a credit card when booking.

5. Tweak your Widget Settings

The Settings tab has several options that allow you to tweak how your booking widget behaves. Most of them are self-explanatory, and you can use the tool tips in the screen that describe some of the options.

"Fake it till you make it"

This is a useful feature for professionals who are starting out and don't have many clients yet. When your clients go to your website to book an appointment, they won't see that your whole day is empty. practiceQ will make it look like you're busy by randomly making some time slots unavailable.

You can choose to look super busy, moderately busy, or disable the feature.

Appointment Reminders

To learn more about how to set up appointment reminders, please refer to this article: Appointment Reminders ([//support.intakeq.com/appointment-reminders/](https://support.intakeq.com/appointment-reminders/)) ([//support.intakeq.com/appointment-reminders/](https://support.intakeq.com/appointment-reminders/))

6. Sync with External Calendar

Connecting practiceQ to your external calendar (Google or Outlook calendar) offers two great benefits:

1. Every appointment made through the booking widget will automatically be created in your external calendar.
2. The booking widget will use your external calendar to determine your availability before displaying your open spots.

To give practiceQ permission to access your external calendar, go to "**Bookings > Booking Settings**" and then select the "**Sync**" tab. Once inside, click on the button "**Connect with Google Calendar / Outlook Calendar**".

[⌚ Hours/Locations](#)[🔗 Services](#)[💰 Payments](#)[⚙️ Settings](#)[📅 Sync](#)[✉️ Emails](#)[🔍 Preview](#)[</> Widget](#)

31

Synchronize with your Google Calendar

Click on the button below to sync your IntakeQ Calendar with your Google Calendar.

Connect with Google Calendar

0

✉️

Synchronize with your Outlook Calendar beta

Click on the button below to sync your IntakeQ Calendar with your Outlook Calendar.

Connect with Outlook Calendar

practiceQ will ask you to authenticate your Google / Microsoft account and give access to your calendar. Once permission is granted, you should be redirected back to practiceQ and see a success message in the Sync tab.

[🔗 Services](#)[⌚ Hours](#)[💰 Payments](#)[⚙️ Settings](#)[📅 Sync](#)[🔍 Preview](#)[</> Get the Widget](#)

Synchronize with your Calendar

Your Google Calendar is connected with your IntakeQ Calendar

Select the calendar you use for appointments:

@gmail.com

Every appointment created through IntakeQ will show up in the selected Google calendar.

✕ Disconnect from Google Calendar

7. Preview and Test Your Widget

You can now test your widget in the **"Preview"** tab.

ServicesHoursPaymentsSettingsSyncPreviewGet the Widget

This is how your widget looks

Service	Duration	Price	
Initial Consultation The purpose of the initial consultation is to get a feel for whether we can do therapeutic work together.	90 min.	\$120.00	Book Now
Follow Up Select this only if you had your initial visit already.	50 min.	\$75.00	Book Now
Skype Consultation If you're not in Toronto, we can still work together via Skype.	50 min.	\$60.00	Book Now
Complimentary Phone Intro Get to know me and understand how I can help you.	15 min.	FREE	Book Now

8. Place the Widget in Your Website

In the last tab you'll find the code snippet that you need to paste in a page in your website. The widget background is transparent, so it will naturally blend with the background color of its container in your website.

✉ [Still need help? Contact Us \(#\)](#)

Last updated on July 19, 2023

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