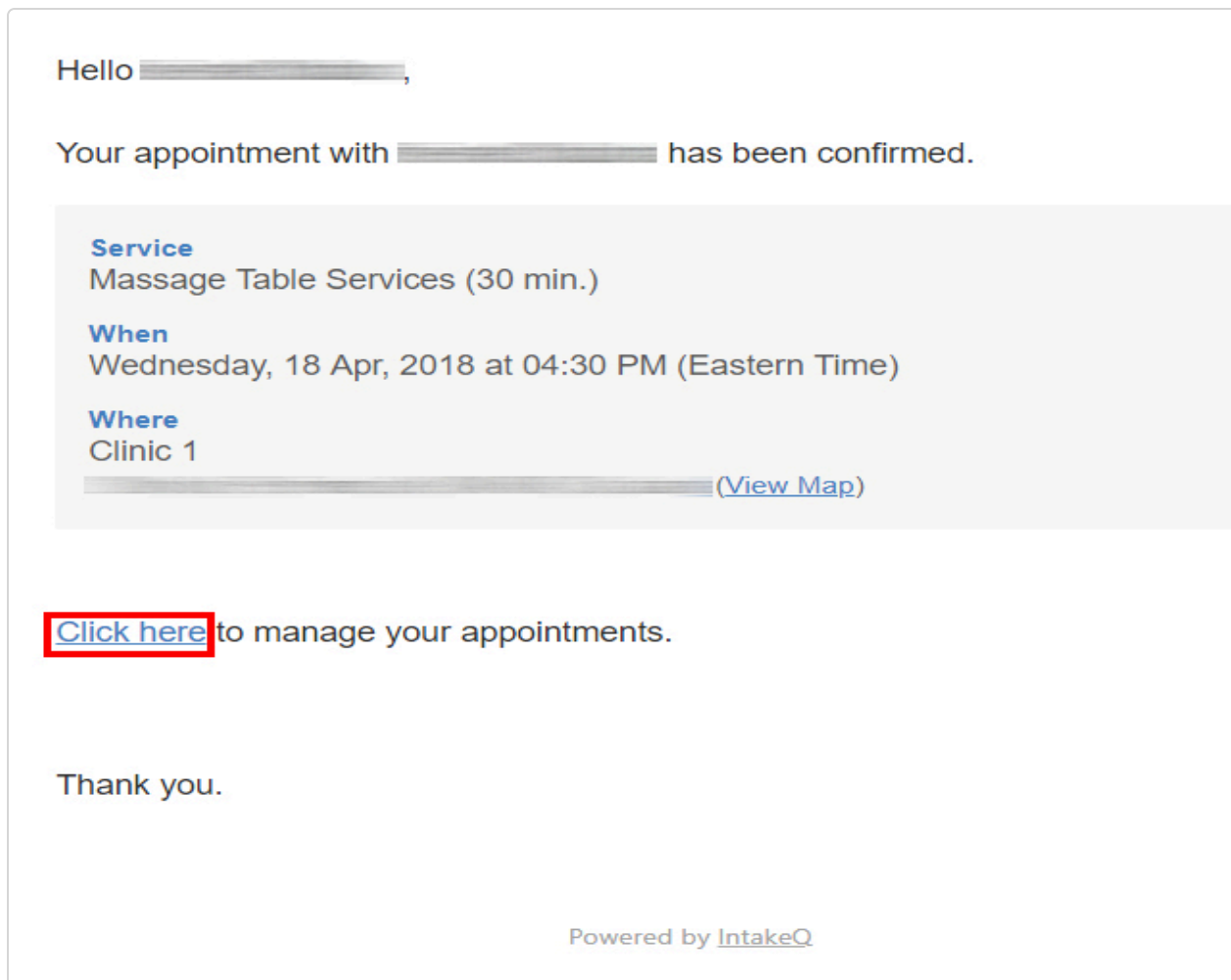


How Can Clients Manage Their Appointments?

IntakeQ gives your clients the ability to manage appointments they schedule with you (this feature can be disabled). Here is how they would go about performing tasks such as rescheduling or cancelling an appointment, or even booking a new one.


Rescheduling an Appointment

To reschedule an appointment, a client can do so by opening the appointment email that was sent to them.




To change the appointment date and time, the client can click "**Click here**" to manage your appointments. This will guide your client to the Booking Login page where they enter their email address.

Online Booking

Book an appointment with 

powered by intakeQ

 Returning Client

Please enter the email you used to book your last appointment.

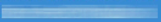
Your Email Address

Continue >

[← Back](#)

After they enter their email address, the client will be prompted that an access code has been emailed to them. When they receive the access code email, they simply need to enter it into the access code field and click "**Login**".

Online Booking

Book an appointment with 

powered by intakeQ

Please check your email inbox

We sent an access code to your email inbox. Please enter the code below.

Enter Access Code

Login >

[← Back](#)

Hello,

Please use the code below to log in to the appointment booking area as a returning client.

Access Code: **744552**

This code will expire in 24 hours.

You received this email because you are booking an appointment as a returning client using our booking widget. In case you received this email by mistake, please email us at hello@intakeq.com.


Powered by [IntakeQ](#)

After the client enters the access code they will see a list of all their scheduled appointments. To the right of the status column is the **"Reschedule"** option (shown below).

Online Booking

Book an appointment with

powered by intakeQ

 Client Area

Future appointments

Service	Date	Time	Status		
Massage Table Services	Apr 18, 2018	4:30 PM	Confirmed	Reschedule	Cancel
Massage Table Services	Apr 18, 2018	5:30 PM	Confirmed	Reschedule	Cancel
Room 42 with a view	Apr 19, 2018	12:00 PM	Confirmed	Reschedule	Cancel

*All times are in America/New_York timezone.

[← Sign Out](#)

[Book New Appointment](#)

When the client clicks **"Reschedule"**, the appointment calendar with the available time slots for that service will appear. This gives the client the ability to select the date and time they wish to reschedule the appointment to.

Online Booking

Book an appointment with _____

powered by intakeQ

Choose a day and time

Massage Table Services (Reschedule)

April 2018						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
01	02	03	04	05	06	07
08	09	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	01	02	03	04	05
06	07	08	09	10	11	12

*Eastern Time

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10:00 AM	10:30 AM	11:00 AM
1:00 PM	1:30 PM	2:00 PM
2:30 PM	3:00 PM	3:30 PM
4:00 PM	4:30 PM	5:00 PM
5:30 PM		

When the client has finished choosing the date and time, they will receive a confirmation of your new appointment. Simply click **"Reschedule Appointment"**, and the new appointment will be saved. The practitioner will receive an email to approve the appointment change. Once approved, the appointment will be rescheduled.

Online Booking

Book an appointment with _____

powered by intakeQ

Confirm Your New Date

Please make sure the information is correct before submitting.

Service

Massage Table Services

When


Apr 19, 2018 at 11:00 AM (Eastern Standard Time)

Duration

30 min.

Cancellation Policy

Cancelling within 24 hours of appointment will incur a charge of 50 % of the full booking.

 [Reschedule Appointment](#)

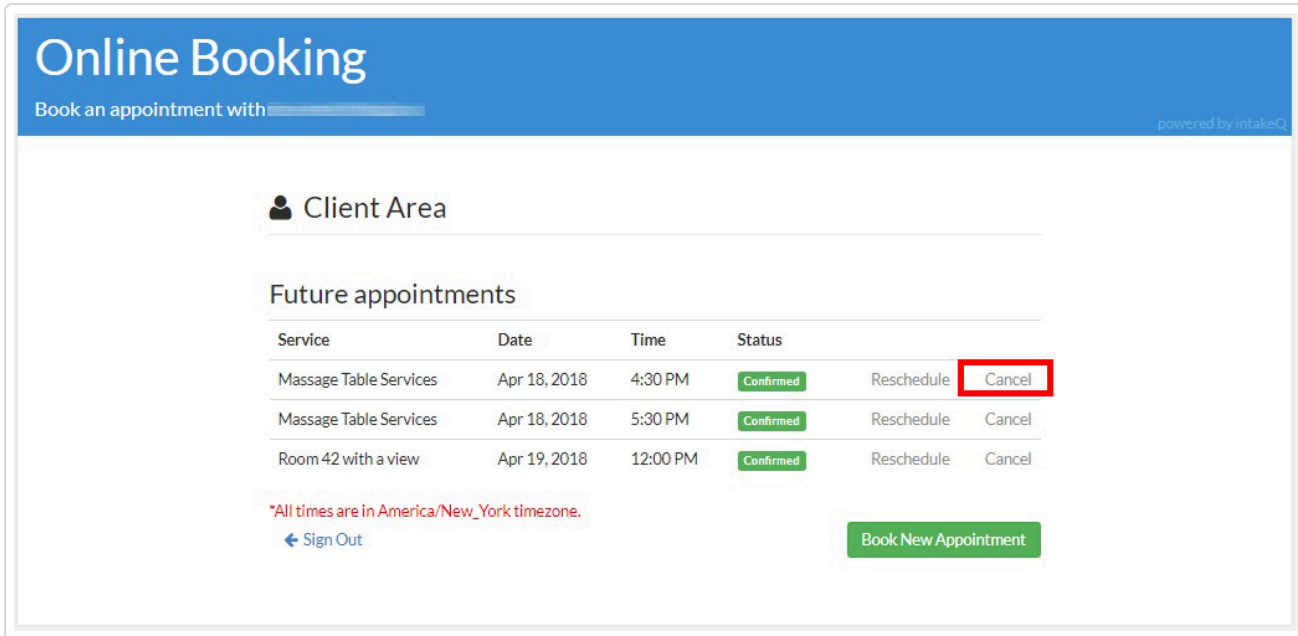


[Pick a different date](#)

[Cancel](#)

Cancelling an Appointment

To cancel an appointment, the steps are very similar to the rescheduling process. After the client enters their access code and is at the list of scheduled appointments, on the far right is the "**Cancel**" option.



The screenshot shows the 'Online Booking' interface. At the top, there's a blue header with the text 'Online Booking' and 'Book an appointment with' followed by a search bar. Below the header, there's a 'Client Area' section. Underneath, there's a 'Future appointments' section containing a table of scheduled appointments. The table has columns for Service, Date, Time, Status, and two action buttons: 'Reschedule' and 'Cancel'. The 'Cancel' button for the first appointment is highlighted with a red box. Below the table, there's a note about the timezone and a 'Sign Out' link. At the bottom right, there's a 'Book New Appointment' button.

Service	Date	Time	Status	Reschedule	Cancel
Massage Table Services	Apr 18, 2018	4:30 PM	Confirmed	Reschedule	Cancel
Massage Table Services	Apr 18, 2018	5:30 PM	Confirmed	Reschedule	Cancel
Room 42 with a view	Apr 19, 2018	12:00 PM	Confirmed	Reschedule	Cancel

*All times are in America/New_York timezone.

[Sign Out](#) [Book New Appointment](#)

When the client clicks "**Cancel**" they will be shown the cancellation confirmation page. Here, they can enter a reason for the cancellation to be passed on to the practitioner. The cancellation policy of the service will be shown, and if there are any penalties for cancelling they will be displayed as well. When the client is finished entering the reason for cancellation, they need to click "**Yes, cancel this appointment**" to finalize the cancellation.

Online Booking

Book an appointment with _____



Cancel Appointment

Cancellation Policy: *Cancelling within 24 hours of appointment will incur a charge of 50 % of the full booking.*

Are you sure you want to cancel this appointment?

Reason for Cancellation:

Please provide a reason for the cancellation

Yes, cancel this appointment

[No, go back](#)

Scheduling Additional Package Appointments

If a client signed up for an appointment package but doesn't schedule all appointments that are part of the package, they can schedule the remaining appointments online.

To do this, they will open the email they received after booking the package appointments and click **"Click here"** to manage the appointments. Then they will enter their email address and access code to gain access to the list of appointments in the package.

When the client gains access to their list of appointments, they'll see the appointments that have yet to be scheduled are listed below the scheduled appointments.

Online Booking

Book an appointment with _____

powered by intakeQ

Client Area

Future appointments

Service	Date	Time	Status		
Room 42 with a view	Apr 19, 2018	11:00 AM	Confirmed	Reschedule	Cancel
Room 42 with a view	Apr 19, 2018	12:00 PM	Confirmed	Reschedule	Cancel

*All times are in America/New_York timezone.

Unscheduled Appointments

Service	
Double the pay, half the time	Schedule
Double the pay, half the time	Schedule

[← Sign Out](#)

[Book New Appointment](#)

If they click "**Schedule**", they will see a calendar and all the available time slots for that service on that day. Once they've selected the appointment date and time, they'll enter their name and email address, and then click "**Continue**" to confirm the appointment.

If the client wants to book the remaining appointments, they can click "**Book another appointment**".

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

Last updated on November 1, 2022