An Introduction to Using YouBook

by ThriveSmart

10 Pages
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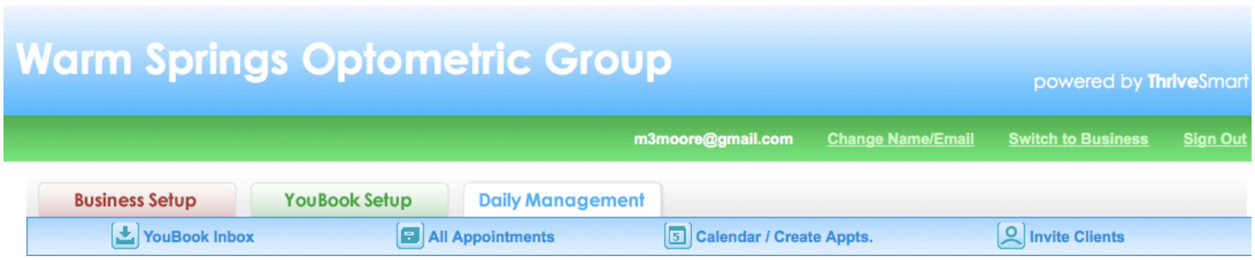
Overview

YouBook provides an account management screen to administrator users at your office. To access this management area, please go to: https://www.thrivesmart.com/x/youbook-manage.html.



The management area is broken up into three sections, as you see above. They are:

- **Business Setup**
  Your business' address and employees

- **YouBook Setup**
  Manage types of appointments, and templates

- **Daily Management**
  View and cancel appointments on a day-to-day basis.

Since we've already setup your business and appointment types, we'll focus on the Daily Management section, and what you'll need to do to view incoming appointments, and cancel or modify them, if need-be.

Daily Management

When you click on the link to your Daily Management section, at the URL below (or navigate to it from the tabs provided), there are several subsections you'll use regularly. They are:

- **YouBook Inbox**
  Where you spend most of your time: all new appointments and cancellations.

- **All Appointments**
  An archive of all appointments ever created or cancelled.

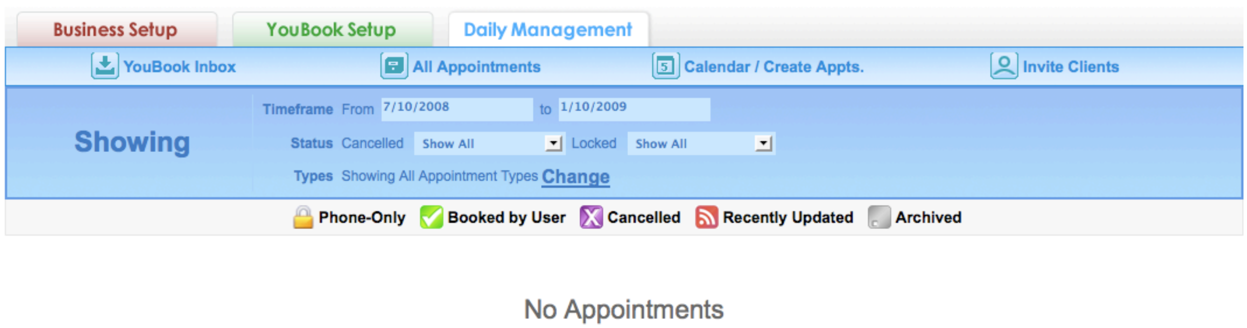
- **Calendar / Create Appointments**
  Calendar View of All Appointments. You can also individually add more appointment slots here, that aren't tied to schedule templates.

- **Invite Clients**
  Send out emails to your patients to book a particular type of appointment at a recommended date. Internet analog to sending a postcard.

We'll take a look at the important ones below.

The YouBook Inbox

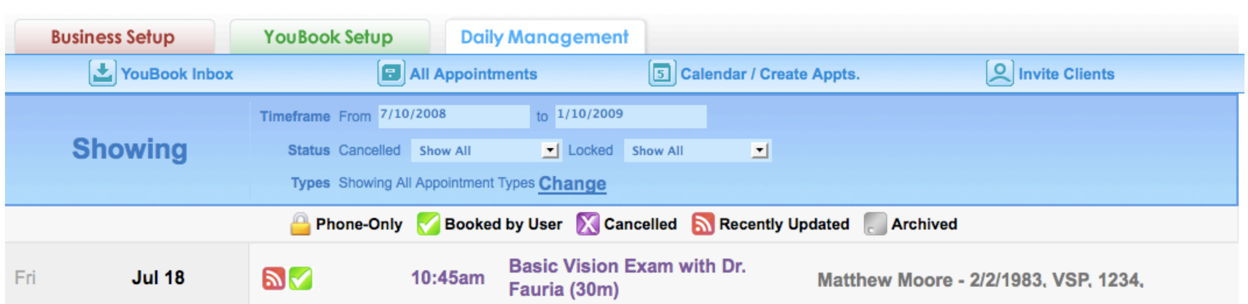
Click on the “YouBook Inbox” sub-section link, and you’ll get to the YouBook Inbox. The Inbox displays all new information about appointments since your office staff last logged into YouBook.



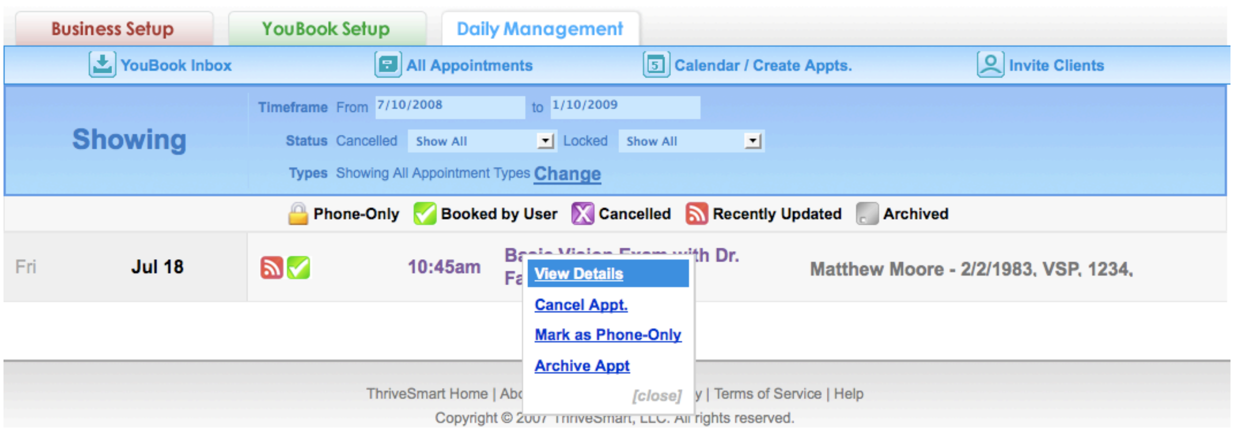
If there is no new appointment information (like the first time you login), the screen will say “No Appointments”, as in the above picture. However, this will change when you get a new appointment!

New Appointments

Once new information comes into the inbox (like a new appointment), you’ll see it appear as a line item, as shown below.



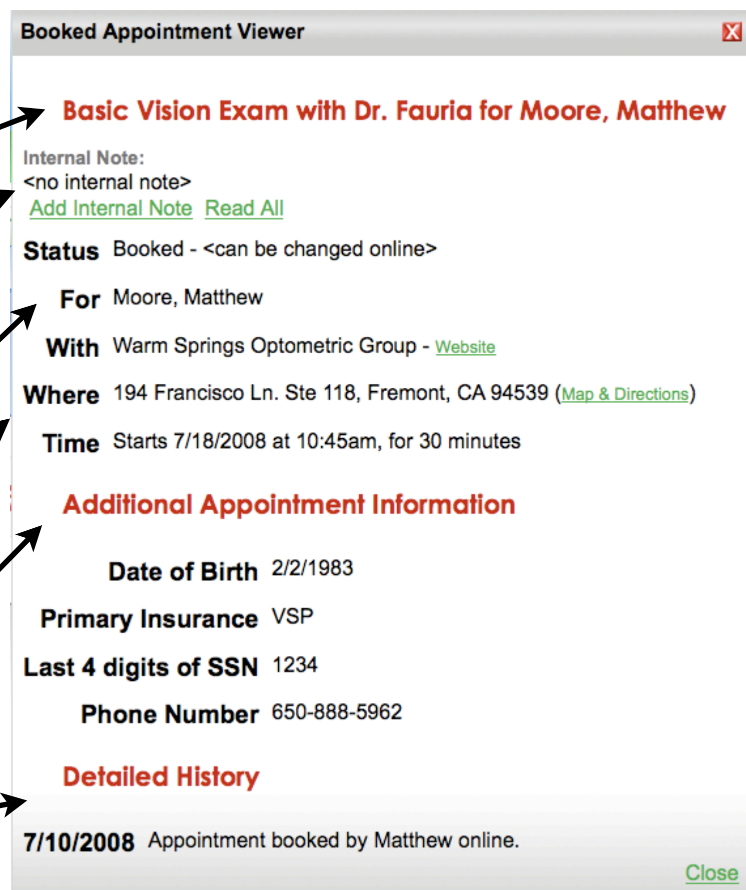
This table is a listing, and only shows summary details. To get more details about the appointment and the patient, click on the line. A menu will appear with different actions you can take for this appointment.



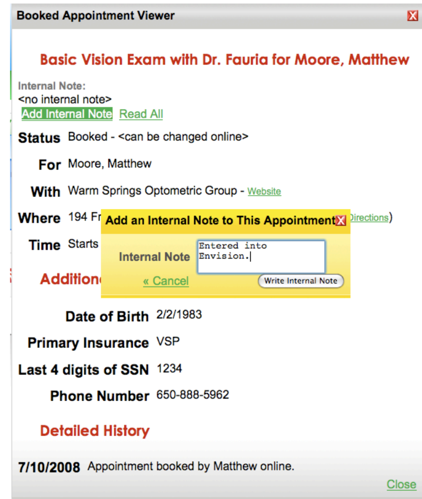
First, we need to view the complete details of this appointment; to do so, click "View Details" in the menu that appears.

A popup window will appear, displaying all of the information about the appointment. This information includes the:

- **Type of appointment**
  As well as who it's with
- **Internal Notes**
  Internal Record Keeping
- **Status**
  (Booked, Cancelled)
- **Name of the patient**
  Last, First
- **Location & Time**
- **Details About Patient**
  Questions specified in each appointment type.
- **Activity History**
  For each appointment

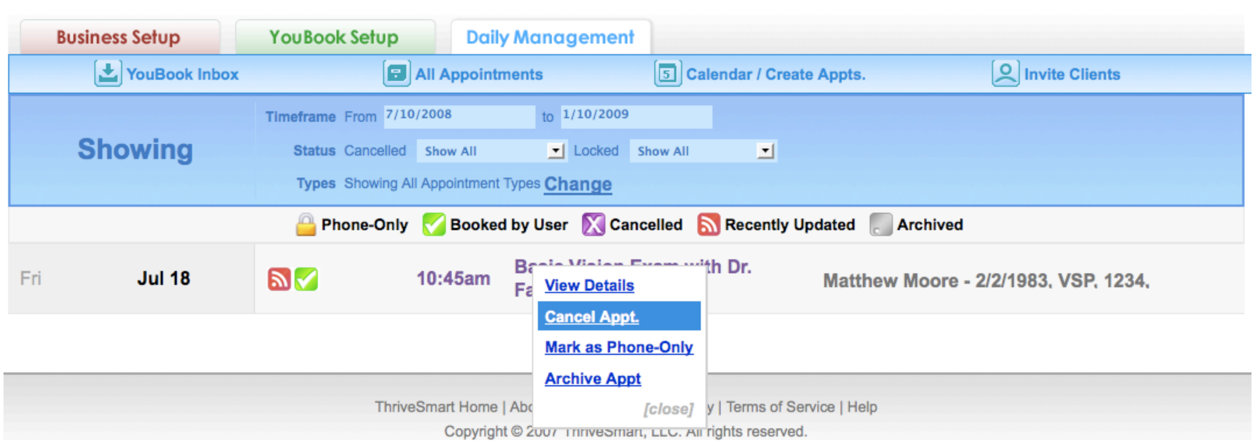


Some offices have multiple staff looking at the same appointments, so it's convenient to use the internal notes feature to keep each other informed with what happened for each appointment. To add an internal note, click the "Add Internal Note" link, and type in the text box that pops up. When you click the button to save it, it will appear in the Internal notes section.



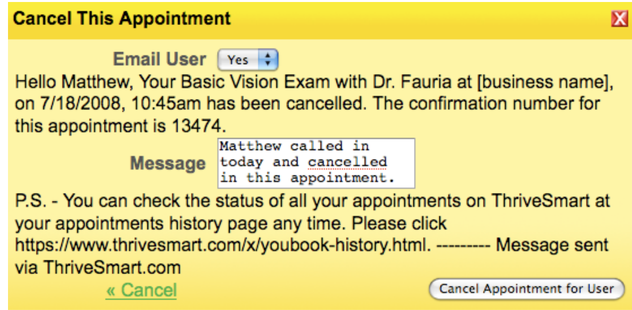
Canceling Appointments

If for some reason you have to cancel an appointment, click the line of the appointment you'd like to cancel. In the menu that pops up (that we saw before), you'll notice one of the options listed is to cancel the appointment. Click that option.



A yellow box will appear. In addition to confirming that you want to cancel the appointment, it shows the email that will be sent to the patient informing them of the cancellation.

You can also type a custom part of the message that will be emailed to them, such as why the appointment has been cancelled.

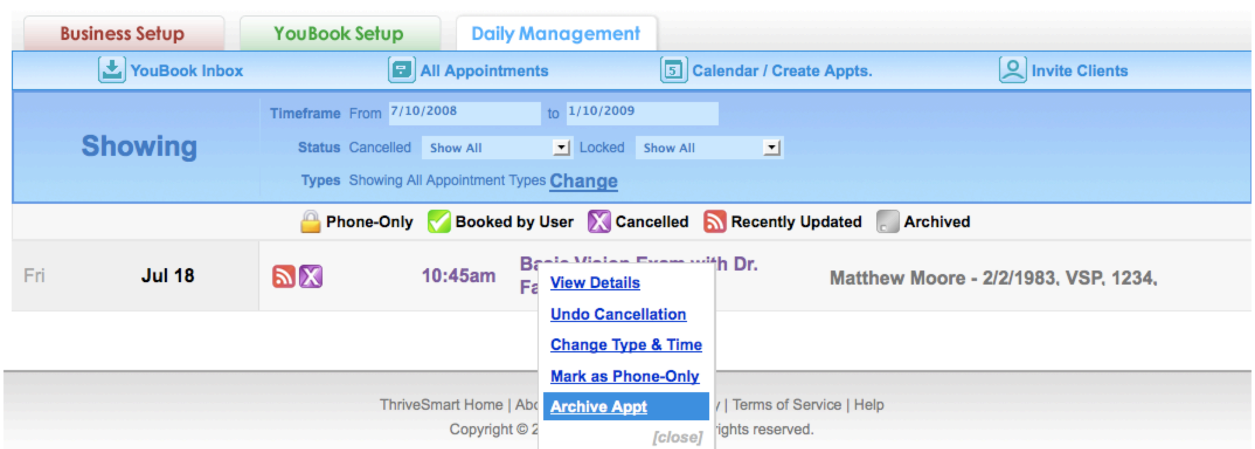


To finally confirm that you want to cancel this appointment, click “Cancel Appointment for this User.”

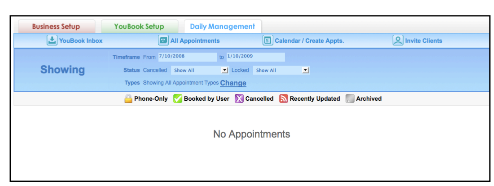
Archiving Appointments

To keep the YouBook Inbox clean, you can archive appointments so that they no longer show up in the Inbox. This is best to do once you’ve copied over appointment information onto your main scheduling or patient management application.

To do so, you’ll again click the appointment line item, and click “Archive Appointment” from the menu that pops up.

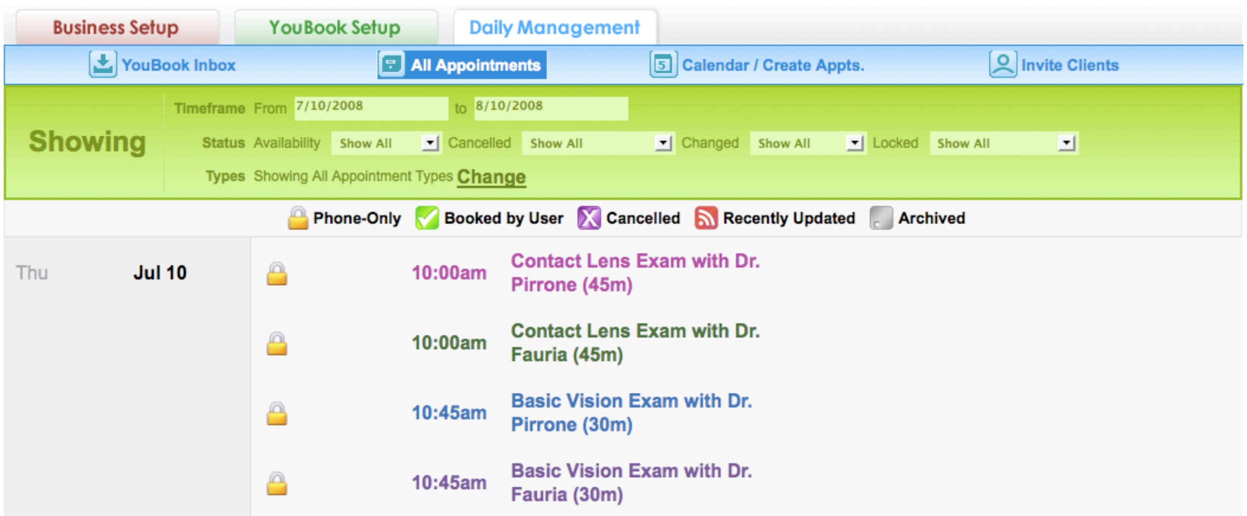


This appointment will no longer show up in the Inbox, unless something changes (like the client cancels it). You’ll be back to your plain-old, empty YouBook Inbox.



All YouBook Appointments

If you want to pull up an appointment that is no longer in your YouBook Inbox, you can go to the “All Appointments” sub-tab.

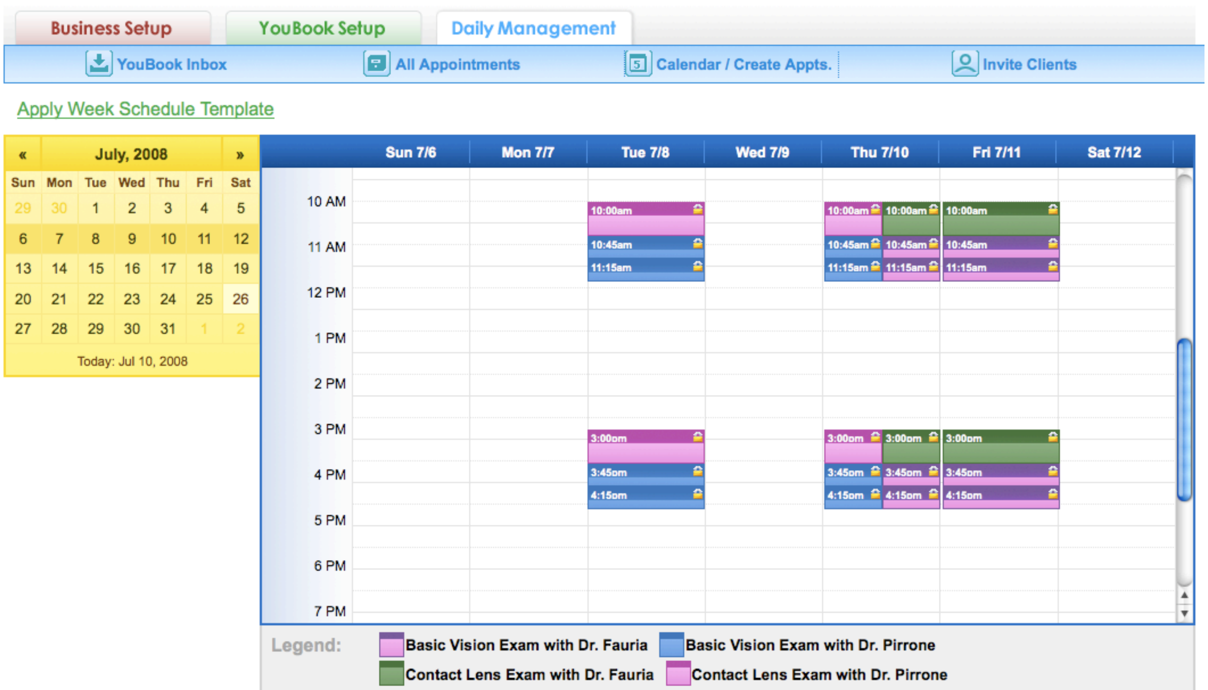


Instead of just showing new appointments, this shows all appointments (booked or otherwise) between certain dates. To find a particular appointment, adjust the dates in the “Timeframe” Section by clicking in the “From” or “to” date box.

The rest of the interface is very similar to the YouBook Inbox, so please refer to that section for more information about viewing each appointment listed in the archive.

Calendar / Create Appointments

You can also see a visual view of the appointments in calendar view. This is a more advanced screen, so it's beyond the scope of this document.



Invite Clients

Many of your tech savvy patients may prefer an email reminder to book their next appointment, instead of a postcard. You can use this last tab to send an email to them that reminds them to book their next appointment. The email will have a link that will easily allow the patient to book their next appointment, right from their computer.

Simply fill out the form, and send the email!