bookthatapp

Getting Started Guide

CONTENTS

bookthatapp

Getting Started Guide

bookthatapp

Getting Started Guide

LOGGING IN

There are two ways to access Book That App. You can either access it through your store or directly from the Book That App website.

- **Via your Shopify Store:** Log in to your Store Admin. Click on the Apps tab and then select Book That App.

Via Book That App: Go to www.bookthatapp.com and enter your shop name.

INSTALLING BOOK THAT APP

INTRODUCTION:

Due to the wide variety of Shopify themes available and the specific characteristics of each theme, Book That App requires a series of **installation steps** in order to get it up and running. While there is an automatic booking form available, it is currently in beta (see Booking Forms below) and **a manual install is recommended**. To begin the installation, click on the **Installation Guide** in the left hand navigation and follow the instructions.

Note: If you are not technical, BTA can be installed for $75. Installations are non-refundable.

Getting Started Guide

BOOKING FORM OPTIONS

Before you begin the installation process, you will need to determine what information you need to capture for your rental. There are four available Options:

BOOKING FORM OPTION 1: CAPTURING A BOOKING DATE

The simplest method of capturing a booking is via a single date picker. This is best for rental products, such as equipment or clothing. Typically this is used with variants that specify a booking period (i.e./ 3 day rental) so you don't need to provide a date picker for the end date.

BOOKING FORM OPTION 2: CAPTURING A DATE RANGE

Capturing a date range is similar to capturing a single date but with an additional date picker to set an end date. BookThatApp automatically ensures that the end date is not before the start date.

BOOKING FORM OPTION 3: CAPTURING TIME

Use this option if you want to display a drop down of times during the day. This option is good for product rentals where you are open for business every day and have a defined start and stop time. Note: See Opening Hours for how to configure available times. (See Installation Guide for additional information)

BOOKING FORM OPTION 4: SCHEDULED TIME WIDGET

To show times available based on the product schedule you can use our scheduled time widget in conjunction with the date picker. The widget shows available time slots based on the schedule configured for that product. When a date is chosen the dropdown updates to only show time slots available on the selected day. The widget code can go anywhere, but it typically added just after the date picker. This is the best option if you want to only offer appointments at certain set times as opposed to hourly. i.e./ 9am, 12 pm and 3 pm. It is also appropriate if you are offering a class or a course.

See Installation Guide for additional information on installing Book That App

Getting Started Guide

ADDING PRODUCTS

Products are imported in BTA through the Products page.

- To import a product, click on the Products link in the left navigation. The products in your store will be shown on the right.
- You can either search for a product in the search box or choose from the list shown. If using search, simply type the first three letters of the product you want to add and it will bring up a list of potential products.
- Products that have already been added will show a check mark beside the product and be greyed out. Products not yet added will have an arrow and show in black. Double click on the product that you want to add and the capacity screen will appear.
- Once you have imported a product, click on it to begin the product configuration process

Note: Only products that are imported and configured in BTA will show the date picker

IMPORTANT: For any product using Book That App, the inventory tracking capability in Shopify for that product should be turned OFF.
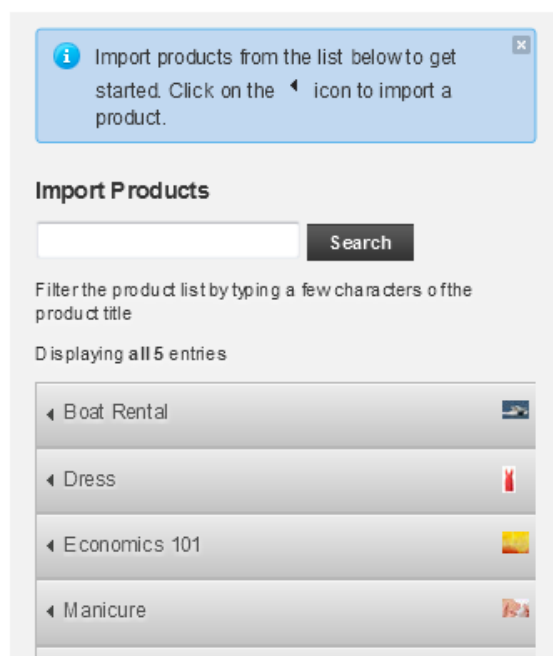
CONFIGURING PRODUCTS

Book That App offers various Profiles based on your rental scenario. Each time you add and configure a product, you need to choose a profile for that product. BTA has five profiles: appointments, class/course, tour/activity, product or general.

APPOINTMENTS:

Installation: To take bookings for appointments, you will need to install the date picker (Booking Option 1) and the time picker (Booking Option 2). See Installation Guide

Product Configuration: Use this configuration if you have set operating hours, days of the week and a set duration for each appointment.

Step 1: Under the Configuration tab in the left hand nav, choose Opening Hours.

- Select the months of the year to which you want these days/hours to be applied
- Hit "Add Times"
- Choose the days of the week and the time period that you are open for each day
- Hit "Create Times"

- To restrict the dates and times on your Date picker to the Opening Hours, then check the box next to "Restrict date pickers and time pickers to opening hours"

Notes:

- If you have additional seasons, you can choose "Create Additional Seasons" and follow the steps above to create a second set of operating hours for a holiday or slow period

- If you want a different set of opening hours at a product level, then you can create a Season that is specific to the product. Simply name the Season with the handle of the product. For example, if your product handle is /overnight-booking then the season name would be overnight-booking.

Step 2: Choose "Appointment" as the profile type

Step 3: Enter the duration – this is the length of time for each appointment. This will configure the time picker to show available times based on the duration and opening hours.

i.e./ If you choose 30 minutes as a duration, the time picker will show 30 minute appointments between the hours of 9 to 5 pm.

Note: If you have multiple variants for appointments (i.e.. 30 and 60 min), then the time picker will show available appointments based on the duration of the variant selected.

bookthatapp

Getting Started Guide

CLASS/COURSE:

Installation: For classes, you will need to install the Scheduled Time Widget. See Installation Guide.

Product Configuration: Use this configuration if you have are offering a class or course where there is a one off date requirement or a recurring schedule.

- **Step 1:** Choose Class/Course as the profile. The schedule tool will now appear.
- **Step 2:** Determine your class schedule:
  - **One Off Dates:** Use this configuration if you offer a class that is a one session class and held once or on multiple one off dates. i.e./ Intro to Wine – Wed Feb 21 from 7 – 9 pm
  - **Recurring:** Use this configuration if you offer a class that is a one session class and held at multiple times. i.e.. Intro to Wine – Each Wed in Feb from 7-9 pm
- **Step 3:** Add the class dates and times using either the One off Dates **OR** Recurring Schedule method
  - **Option 1**: One Off dates:
    - Enter the duration of your class i.e.. 3 hours
    - Click "Add Date". Set your date and start time. i.e.. Sept 11 12:00 pm
    - The class will now populate in the calendar view
    - Hit "Save"
  - If you want to add another one-off date, then choose Add Date and repeat

- **Option 2: Recurring Schedule**:
  - o Check "Repeating". The repeat schedule tool will now appear.
  - o Enter a Start Date and a Duration
  - o Enter the schedule. Choose when it repeats, the month and days, the time it starts and an end date (i.e./ Offered M, W or F for two weeks)
  - o Click "+Rule" to add in a different day and or time (i.e./ 9 am class and a 12 pm class)
  - o Hit Save

bookthatapp

Getting Started Guide

Installation: For tours and activities, you will need to install the Scheduled Time Widget. See Installation Guide.

Product Configuration: Use this configuration if you have are offering a tour or group activity where you need to offer a group and individual rate

- **Step 1:** Choose Tours/Activities as the profile. The schedule tool will now appear.
- **Step 2:** Determine your tour schedule:
  - o **One Off Dates:** Use this configuration if you offer a tour that is a one session tour and held once or on multiple one off dates. i.e./ Mountain Tour – Wed Feb 21 7am –1 pm
  - o **Recurring:** Use this configuration if you offer a tour that is a one session class and held at multiple times. i.e.. Great Lakes Tour – Each Wed in Feb from 7am to 12pm
- **Step 3:** Add the tour dates and times using either the One off Dates **OR** Recurring Schedule method
  - o **Option 1**: One Off dates:
    - ▪ Enter the duration of your tour i.e.. 3 hours
    - ▪ Click "Add Date". Set your date and start time. i.e.. Sept 11 12:00 pm
    - ▪ The tour date will now populate in the calendar view
    - ▪ Hit "Save"
  - o If you want to add another one-off date, then choose Add Date and repeat

- **Option 2: Recurring Schedule**:
  - o Check "Repeating". The repeat schedule tool will now appear.
  - o Enter a Start Date and a Duration
  - o Enter the schedule. Choose when it repeats, the month and days, the time it starts and an end date (i.e./ Offered M, W or F for two weeks)
  - o Click "+Rule" to add in a different day and or time (i.e./ 9 am class and a 12 pm class)
  - o Hit Save

bookthatapp

Getting Started Guide

PRODUCT:

Installation: For classes, you will need to install either the Date picker or the Date Range picker. See Installation Guide.

Product Configuration: Use this configuration if you have a physical product to rent. If you need specific pickup or drop off times, then use the Appointment profile. (See Appointment profile above)

> Note: Follow Option 1 or 2 depending on date picker that was installed

- Option 1: Date Picker: If you require a start date and a number of days for a rental, use this configuration.
    - Step 1: Create your product in Shopify and set up variants
        - One day rental = $ 10, two day rental = $15, 1 week rental = $75.
    - Step 2: Import the product into BTA and choose Product as the profile
    - Step 3: Set a duration for each variant
        - One day rental = 1 day, two day rental = 2 days, 1 week rental = 7 days
    - Step 4: Hit save

- Option 2: To and From Dates: This allows you to charge a daily rate and put in a rental start and end date with the total price being a calculation of daily rate x number of days
    - Step 1: Import your product into BTA and choose Product as the profile
    - Step 2: Set a duration for each variants
    - Step 3: Hit Save
    - Step 4: In the settings file, select Date Range Updates quantity if you want the price to be the daily rate x the number of days selected.

GENERAL

If none of the above fit your scenarios, we suggest using general as it displays all available fields.

If you are unsure of how to configure your products, please email support@shopifyconcierge.com and we'll be happy to help you out.

ADDITIONAL FIELDS:

Cut Off Date – The first available date to be selected in the date picker

Lead time – The number of days added before the start of the booking.

Lag time – The time required to get the item ready before the next booking or rental. Automatically added to the end date when a new booking is created.

Getting Started Guide

CALENDAR PAGE:

 This creates a page that shows a monthly calendar and the products that are available on each date.   (Note: Only products with a Schedule show on the calendar)
To add this page, first, create a new page in your Shopify store. Next, add it to the main navigation link list and have it go to:
http://< insert store name here>.myshopify.com/apps/bookthatapp/calendar.

Product Page

MANUALLY CREATING A NEW BOOKING:

For orders that do not come in via your Shopify store, there are two ways to create a new booking:

Click on the input field next to New Booking and choose the date from the drop down calendar OR

Double click on any date in the calendar to create a new booking

Calendar Page

bookthatapp

Getting Started Guide

Once the date has been selected, the Create Booking Page appears:

- Product: Select the product for the booking
- Variant: Select the variant (if appropriate)
- Date / Time: You can either create an all day event (default) or uncheck all day and enter the date and time of the new booking.
- Name: Enter the name associated with the booking
- Email: Enter the email address associated with the booking
- Number in Party: This represents the number of people associated with the booking (if applicable)
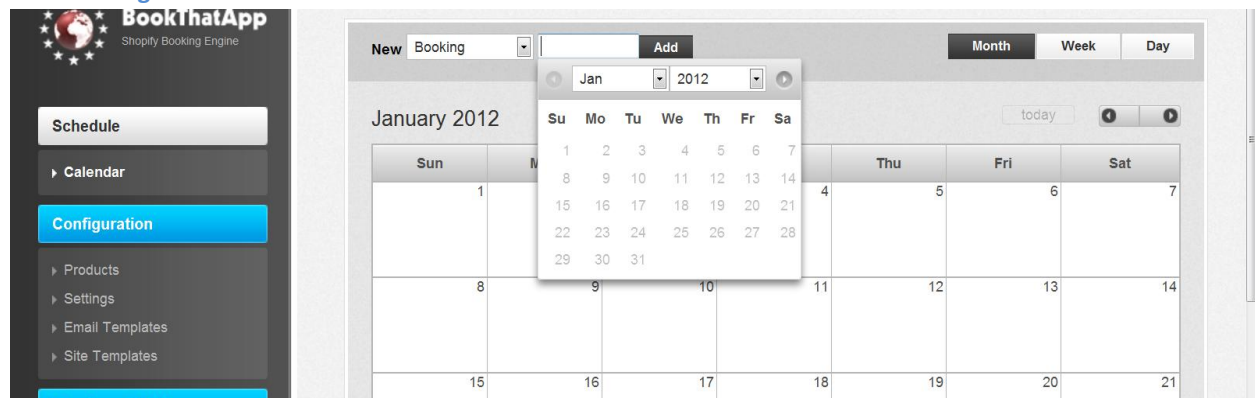- SKU: The stock keeping unit (if applicable) associated with the product ordered. This will populate automatically if the order comes in via Shopify.
- Hotel: This field is used for bookings where there is a pickup location at a hotel.
- Order: For orders that come in via Shopify, this field will populate the order #
- Status: For orders that come in via Shopify, this field will update based on how you have configured payments in Shopify. If you have set your payment preferences to take payment at a later time (authorize), then the booking will show in BTA as "pending". If you have taken payment (authorize/charge), then it shows as "confirmed". You can manually change this field to pending or confirmed for manual bookings.
- Notes: Use this field for any additional information that needs to be captured with the booking
- Save: Saves the booking as a new appointment in the calendar and updates product availability
- Delete: Deletes the booking in the calendar and updates product availability
- Email Confirmation: Emails the booking confirmation to the customer
- Download Ticket: Once a booking has been saved, if you edit the booking form, there is the option to Download Ticket. This ticket is a PDF file of the booking information.

![booKthatapp logo]

Getting Started Guide

Create Booking Form

CREATING A BLACKOUT PERIOD:

At the top of the page select New Blackout Period from the drop down menu. Then choose your date and select Add.

Calendar Page
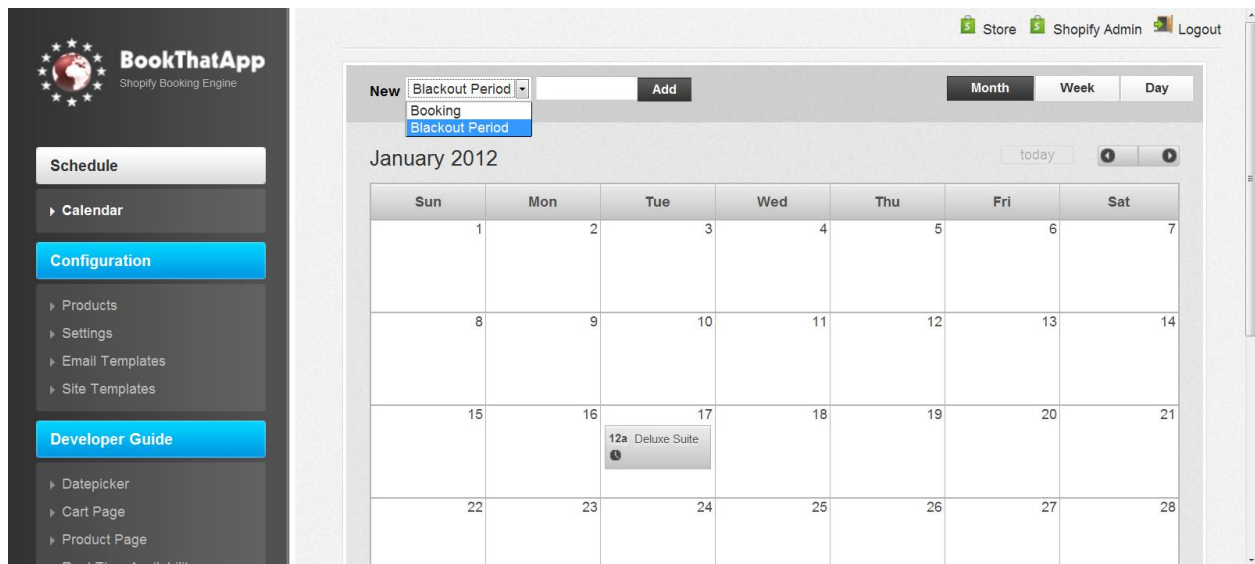
The next screen that appears is the Create Blackout Date page. From here you can either choose a blackout period that applies to all products for a date range, or choose an individual product to blackout for a date range.

> All Products: For the blackout to apply to all products, leave the Product dropdown set to "Select Product", choose the date or date range for the blackout, and hit save
> Individual Products: Select the product from the drop down menu that you want to black out, choose the date or date range for the blackout and hit save.

Create Blackout Date Page
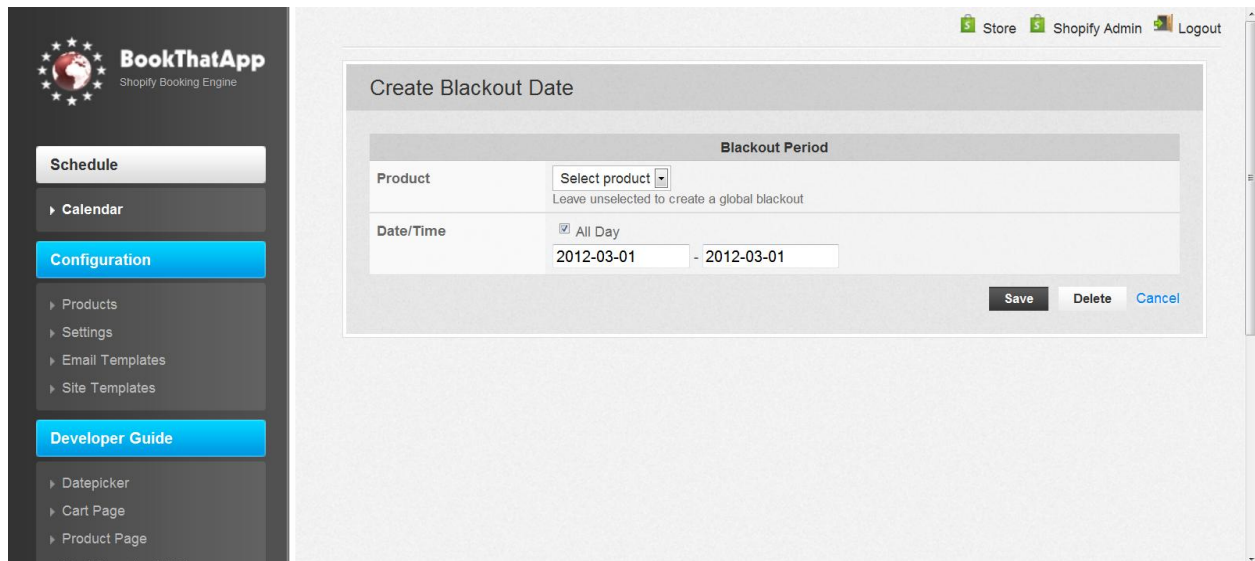
Editing a Booking / Blackout Date:

> To edit a booking or a blackout date, simply hover over the date in the calendar view. If it is a booking, a pop up will appear giving you the option to edit, email a reminder or delete the booking. If it is a blackout date, a pop up will appear giving you the option to edit or delete the blackout date.
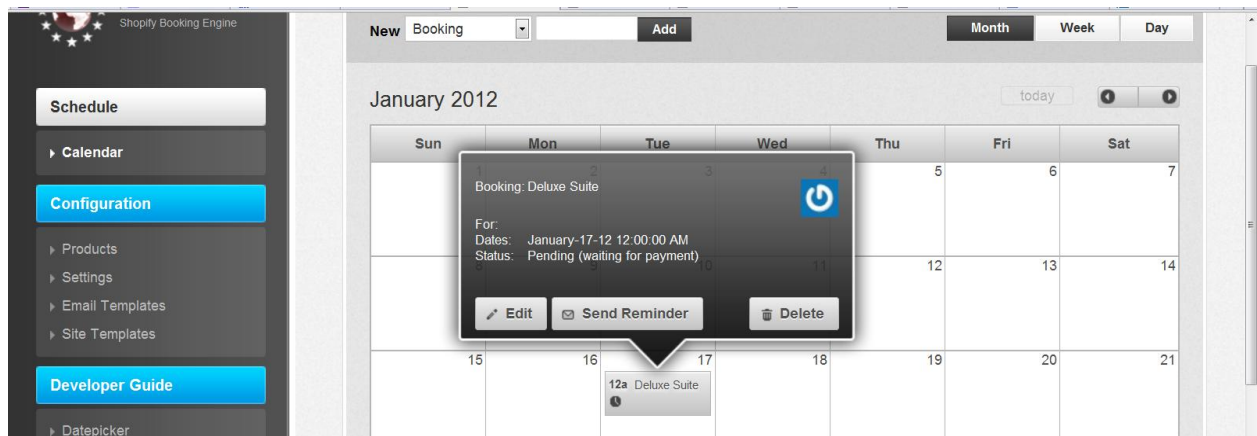
Editing a Booking / Blackout Date:

SCHEDULE PAGE
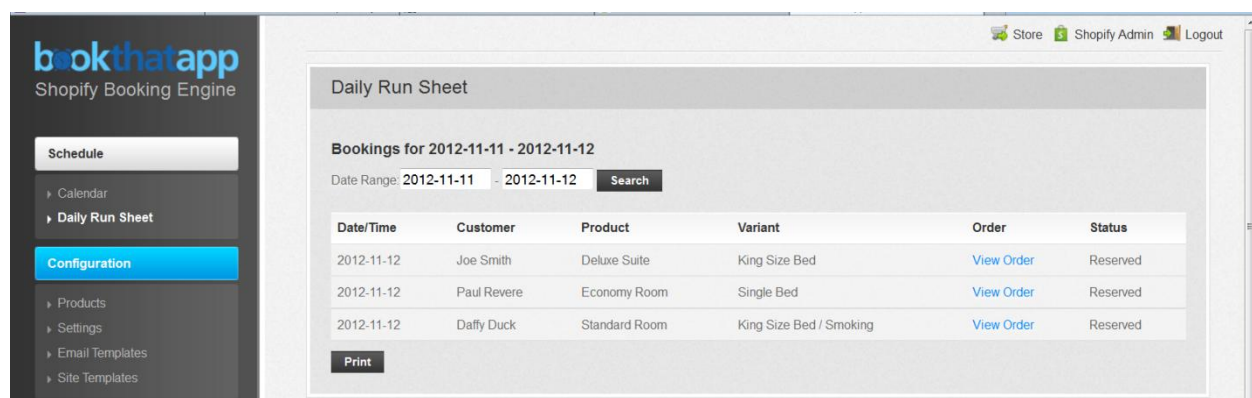
![bookthatapp logo]

Getting Started Guide

Calendar: The calendar view shows you your bookings at a glance at either a monthly, weekly, or daily view. It also allows you to manually add a booking.
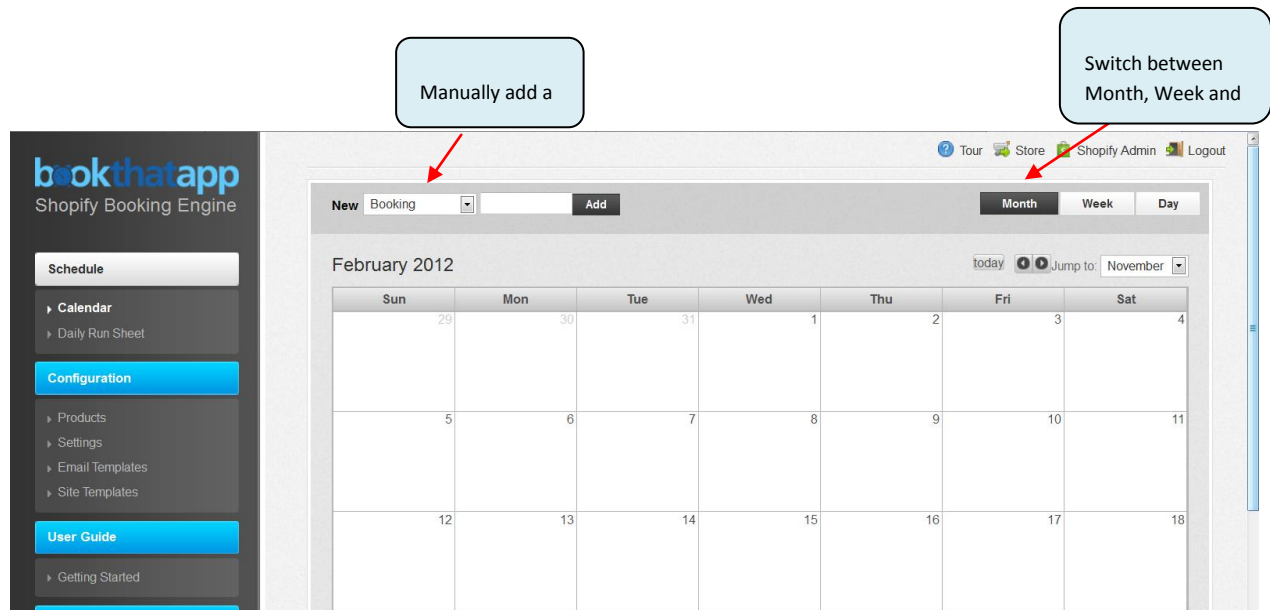
Daily Run Sheet: This presents a summary view of your bookings for a specific date or date range. You can run it by all products or a specific product/variant.

SETTINGS PAGE

BOOKING SEARCH TAB

You can choose to have this active (auto install) or inactive (custom install) (See installation options above) (under Beta – not recommended for use):

This is an automatic booking form that will float on the right hand of the screen. In the Settings tab, the Booking Wizard will default to "Inactive".   When this is set to Active, the booking form will appear automatically on your site in a floating tool bar on the right hand side of the screen. If you choose this option, the booking form will appear automatically and when a date range is entered, it will return all products that are available on this date. Due to the wide variety of themes available, there may be formatting issues with the booking form and the search results page.

Configuration Page

MESSAGES

Booked Out Message: Enter the message you want customers to see when a product is not available for booking.

Blacked Out Message: Enter the message you want customers to see when a date range is not available for booking.

PRODUCT PAGE:

Date Range Updates Quantity: This settings works when a date range is being captured on the product page. When set to Yes the quantity on the product page will be set to the number of days selected by the customer using the From and To dates. This is handy for sites where the price reflects the daily charge.

SYSTEM

Time Zone: Select the time zone that you want for your bookings

Script/Webhooks: We may ask you to reinstall the scripts and webhooks that Book That App uses to integrate with Shopify as part of troubleshooting a support ticket. This does not change anything in Book That App or Shopify except the integration scripts.

EMAIL TEMPLATES:

If you are familiar with HTML, you can customize the email notifications that your customers receive.

SITE TEMPLATES

If you are familiar with HTML, you can customize the site templates to match your store theme.

IMPORTANT NOTES:

BTA is currently under development and **feedback is welcome**.

If you find a bug, have a feature request or a general question please submit a help ticket at http://support.shopifyconcierge.com.