



Amelia

Appointment Booking WordPress Plugin Documentation

Thank you very much for purchasing Amelia Appointment Booking WordPress Plugin! Your purchase will support our further work on this project, and we will keep doing our best to make Amelia even better with every release.

Amelia is a lightweight and straightforward, yet comprehensive appointment and event booking system. It is built to turn any WordPress site into a fully-featured tool to manage appointments and events bookings and their payments.

This file contains the main information on installing, configuring, and starting to use Amelia. You can always read detailed documentation and see live examples [on this link](#).

Best of luck with your business, Amelia is here to help! :)

Installation

The installation process for the Amelia booking plugin is quite standard and straightforward, just follow these simple steps:

1. **Download the file from TMS store.**

Once you purchase Amelia, you can download the .zip file from the [TMS Store](#) to your computer. The .zip file contains the latest version of the Amelia booking plugin. Download it to your computer.

2. **Upload the plugin to your WordPress website.**

There are 2 ways to do this:

- Open your WordPress admin panel, go to **Plugins > Add new > Upload**, and choose the .zip file that you downloaded from the TMS store.
- Unzip the file that you downloaded from the TMS store. Open your WordPress installation folder from FTP manager (it could be CyberDuck, FileZilla, Total Commander, or some other). Go to **wp-content/plugins/**, and upload the folder you previously unzipped.

3. **Activate the plugin.**

In your WordPress admin panel go to **Plugins**, find Amelia booking, and click **“Activate”**.

Main Amelia Configuration

Amelia Booking provides you with numerous settings which allow you to configure your installation of the plugin as appropriate for your business. It consists of:

- **General Settings** - these settings include several main options: Default Time Slot Step, Default Appointment Status, Minimum time required before booking, Minimum time required before canceling, Period available for booking in advance, Phone default country code, Show time slots in a client time zone, Default items per page option and many more. You can read a detailed explanation of all options [here](#).
- **Company Settings** - These settings give you the possibility to set a picture, name, address, website, and phone number of your company. These settings will be used in notifications sent to your customers and employees.
- **Notification Settings** - Use these settings to configure how your customers and employees will be notified about different appointment-related actions. There are three different mail services that can be used to send email notifications to your customers and employees: PHP Mail, SMTP, and Mailgun. More about these options you can read [here](#).

- **Working Hours & Days Off Settings** - Working Hours option allows you to set working hours and breaks for the whole company, and days off setting gives you the possibility to set one or multiple days off for the whole company. More about these options you can read [here](#).
- **Payment Settings** - Payment settings allow you to set the price format and the type of payment to be used on the website. The format you choose will be applied to all prices on the front-end and back-end of the plugin. Currently, we support six payment methods: On-site, PayPal, Stripe, WooCommerce, Mollie, and RazorPay payment method. You can read more about it at [this link](#).
- **Integration Settings** - these settings offer you the possibility to activate and set one or multiple integrations that will help your business. You can sync with [Google](#) and/or [Outlook](#) Calendars, use [Zoom](#) or [Google Meet](#) to offer online appointments/events, and use [Marketing Tools](#) or [WebHooks](#) to send the data to third-party applications.

One of the most important settings is to configure **WordPress Date/Time settings**. You can modify these settings by going to **Settings » General** page in the WordPress admin area and scrolling down to the timezone section. Set up your Timezone, Date Format, Time Format, and the Week Starts On settings. This is where you can choose a timezone for your website along with the date and time formats. These settings will be used by Amelia booking.

Guide through Amelia Booking plugin

Starting to work with the Amelia plugin is really easy, all you need to add is at least one service, and at least one employee – just add these and you can start using booking forms!

Adding a Service

The first thing you need to do to get started is to create a service, i.e. the activity that customers will book using your website.

To add a service, open the WordPress admin panel with an administrator user account, and go to Amelia -> Services. Once the page is open, you need to add a category. Click the “Add category” button. Give a name to the new category and then click the “Apply” button.

When the category is added you can click on the “Add Service” button in the top right of the screen. In the sidebar that appears you can provide the service details. Mandatory parameters are: name, category, duration and price. You can additionally specify a lot of other parameters (service picture and gallery, buffer time, capacity, etc.) – read more about working with services [on this page](#). Once the service is saved it should appear in the list.

Adding an Employee

Employees are the people that provide services to the customers (e.g. trainers, coaches, doctors, etc.). Each employee can provide an individually configured list of services, can have his/her own working schedule, and have other settings.

To add an employee, in the WordPress Admin Panel go to Amelia -> Employees. There click on the “Add Employee” button either in the top right or in the bottom right of the screen. In the first tab of the sidebar that appears you can define your employee’s primary details. Mandatory details are: first and last name, and email. Other details (photo, related WordPress user, phone, notes, etc.) are optional. Before saving, go to the second tab, and tick the checkbox near the service we’ve created on the first step, to assign newly created employee to this service. You can read more about managing the employees [on this link](#).

Once you’ve done configuring the employee click the Save button in the bottom right of the sidebar. The employee should appear in the list.

Adding the Step-By-Step Booking Wizard to WordPress site’s front-end

To allow your customers to book appointments, you need to add one of the booking forms to the site’s front-end. Amelia plugin provides 3 different views through which customers can book appointments: [Booking Search view](#), [Step-By-Step Booking Wizard](#) and [Services Catalog](#). You can read more about using each of these in the provided links above, for quickstart we will just use Step-By-Step booking wizard.

First you need to create a WordPress Post or Page. We will create a page: in the WordPress admin panel go to “Pages -> Add New”, and give some name to a page. Then we need to add the step-by-step booking form to the page. To do that we can click the Amelia button in the editor. Choose “Booking” in the dropdown and click OK. The shortcode will appear in the text. Alternatively you can just type in the shortcode `[[ameliabooking]]` manually. Save the page, and open it in site’s front-end. You should see the booking wizard appear. Follow the wizard steps to book an appointment. More explanations about front-end booking you can read following [this link](#).

Managing Appointments in WordPress Admin

After an appointment has been booked from front-end you can manage it from your WordPress’

admin panel. Go to your WordPress admin and open Amelia -> Appointments. You should see the appointment you've just booked from front-end. You can use the controls to change the appointment status (reject or approve), or click "Edit" to adjust the appointment parameters.

There are two different types of appointments based on the maximum capacity of the service that is delivered. Appointment is considered as "Single" if the maximum capacity of the service is 1. If the maximum capacity is higher than 1, appointment is considered as "Group". You have two types of group appointments:

- 1) group appointment where all customers are separate (this is usually the case when they don't know each other but it is not the rule), and
- 2) group appointment where one customer adds number of persons that are coming with him.

The main difference between these two is that in the first one every person appears in appointment as separate person with its name, email, appointment status, payment details etc. and like that every person can separately cancel the appointment. The case with the second type of group appointment is that only the person whose scheduled appointment has a name, email, appointment status and payment details and the others are seen as +1,2 etc. So when one of them wants to cancel the appointment you have two options, either they will cancel for all or you will reduce the number of persons in the Edit Appointment modal.

Beside adding the Appointment from the front-end you or your manager can easily schedule an appointment from WordPress dashboard. To create an appointment from the back-end click the "+ New Appointment" button located at the top of the page or you click "+" (plus icon) button in the bottom right corner of the page. Once you click on one of the buttons it will open a "New Appointment" dialog allowing you to choose all necessary information in order to create a new appointment. More about managing the appointments you can read [on this link](#).

Dashboard

A "Dashboard" page also refers to the first page that appears upon opening a plugin if you are logged in as "Administrator" or "Amelia Manager" user role. The Dashboard view summarizes monitoring information about your appointments, services, employees and revenue. Here you can track number of approved, pending and average bookings and revenue for selected date range, track relation between interest and bookings, track number of new and returned customers and see your today's appointments. More about how you can track your analytics on Dashboard page you can read [on this link](#).

Calendar

The “Calendar” page shows calendar with all schedules appointments. There are five available calendar views: “Month”, “Week”, “Day”, “List” and “Timeline”. “Week” is set as default calendar view and it displays seven columns, each representing a day of the current week. You can navigate through the calendar by clicking on arrows in the top left corner of the calendar, and move one step forward or one step back (by a month or a week for example). You can also quickly find relevant data by using services, locations and employees filters.

One great feature is that future appointments can be rescheduled through dragging the event in the calendar. It is not possible to drag them in the past, outside of the employee’s working hours and in the employee’s breaks. You can also click on the appointment that is in the future to edit all the information from appointments modal, or add new appointment by clicking on the “+” button or “New Appointment” button. More about Calendar option you can read [on this link](#).

Locations

You can have one or several locations, depending on the type of the services you offer. If you have just one location, you have two options:

- a) You can add it, or
- b) You can leave this page empty without any location, and this option will disappear from other pages and also from your front-end website.

You need to know that location is connected to the employees, so if you have it more than one, in the employee modal this option will become mandatory to select.

To add a new location, go to the Locations page, click on the “+ Add Location” button or “+” button, and like for everything else, the New Location modal will appear. It is required to enter the name and the address, everything else you can add if you want.

Like any other page, on the Locations page you can also search and sort locations, which is really helpful if your company has business spread out across numerous locations. More about the Locations you can read [on this link](#).

Customers

Whatever business you do and you have customer or clients this is the page to keep their record. Customers page gives you the possibility to easily track your customers if you are logged in as “Administrator” or “Amelia Manager” user role. Every time you add new customer at back-end of the plugin or new customer books appointment on your website, they will be added to this list automatically (no matter if they have customer role in Wordpress or not).

To create your first customer, go to the Customers page, click on the “+Add Customer” button or “+” button on the bottom left side of the page and New Customer dialog will appear. When you are creating the customer it is mandatory to enter customer first name, last name and email. Other options such as WordPress user, phone, gender, date of birth and internal note are optional.

After you have entered all desired data, click on the Save button and your Customer will appear on the Customers list.

Like on the other pages you can always Edit your customers data, and use search and sort options to easily find some customer on the list. You can also export your full list of customers in CSV file, by clicking on the “Export” button, so you can have a list outside of your plugin. You can read more about customers [on this link](#).

Finance

The “Finance” page is a page where you can track payments for your appointments. It consists of two tabs: Payments and Coupons. Coupons tab isn’t always visible, it depends on whether you have enabled coupons option in the plugin’s settings.

On the Payments tab you can see all the informations about individual payments. You can select the date range for which you want to see the payments, and easily filter them with the provided filters.

On the Coupons tab you can create Coupons to provide a discount for your customers, and track on the coupons list their use. Just click on the “+ New Coupon” button, enter all information and after you Save it, the coupon will appear on the list. More about the Finance page you can read [on this link](#).

Email Notifications

To set up notifications you have to first configure [Notification Settings](#) on Amelia Booking Settings page. Settings that are mandatory are “Sender Name” and “Sender Email”. By the default Mail Service is set to PHP Mail but we strongly recommend to change it to any other mail server.

Each notification is enabled by default and it is possible to disable notification if you want to prevent it from being sent. Also it comes with the default Subject and Message that can be changed. In the Subject and in the Message it is possible to use placeholders. In the real

notifications that are received by your customers and employees, placeholders will be replaced with the real data. To read more about notification please follow [this link](#).

Customize

Design of Amelia front-end forms and inputs relies on just several basic colours and styles. It makes the customisation of the design incredibly smooth and straightforward, so you can adjust Amelia to match any corporate branding and WordPress theme.

To customize the design go to your WordPress Admin panel with an admin account, there go to Amelia -> Customize. There you will see the WISYWYG style customizer. All changes are visible in realtime in the righthand preview box, and after you click "Save" the configured style will apply for all front-end forms.