



Training Manual

User and Configuration

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1 Logging in

To log into JRNI please enter the URL you have been provided with from JRNI.

You will be presented with the below log in page. The site URL will be predefined then you can enter your username and password.



Login to view your account

Site

Username

Password

[Forgot your password?](#)

Login

Once you have entered your details and click the login button you will have the option to either log into a particular location, or administer parent level. ([See 'Parent Level Overview Section for more details'](#))⁴

If you have access to one location you will be taken directly to the calendar page of that location upon logging in.

2 Parent Level Overview

At parent level, you have a quick overview of all of your locations in order to have easy access to each location. In this screen, you can perform several edit and search functions, as well as configure your company at the parent level.

The screenshot shows the JRNi Parent Level Overview dashboard. The header includes the JRNi logo (1), a search bar (2), and user information 'JRNi Parent' (3) and 'TU Test User' (4). The left sidebar contains navigation options: HOME, Insights BETA, Locations (5), YOUR BUSINESS, CUSTOMISE, and SETTINGS. The main content area displays four child account cards: 'JRNi Child 1 (Appointments)' (6), 'JRNi Child 2 (Appointments)', 'JRNi Child 3 (Events)', and 'JRNi Child 4 (Events)'. Each card shows details for '3-7 Herbal Hill' (Address), 'EC1 R5EJ' (Postcode), 'United Kingdom' (Country), and 'Europe/London' (Timezone), along with a 'Login' button.

Elements on this screen are listed below:

1. By clicking on the logo you will be brought to this main screen.
2. You are able to search for customers and bookings across all your accounts using this search bar.
3. Click on the account name to switch into a different account.
4. Click on your user name to log out and manage users.
 - 4a. To add a new user, click manage users. Once on the user page click on 'create new' and enter the user details. The new user will then receive an email to create their password.
5. Click on 'Locations' to view all child accounts.
6. Click the 'log in' button to log into the child account / particular location.



Click here to view a training video about this function

3 Insights

CSV Reports:

The CSV reports is a section in JRNI where you can find a variety of different reports including booking and customer reports. You can export as CSV to view raw data and manipulate the data to your specific needs.

Please follow the below steps to download a CSV report:

1. Click on CSV reports tab.
2. Click on reports.
3. Choose the report you want and click create.
4. Enter the date range you wish to report on.
5. The report is now being built and will be saved in saved reports. Click on saved reports.
6. Click on the most recent report that have been created and click 'actions' and 'download'.

Tip: The best report to use is the 'Details of every single separate booking including booking questions (all fields) and arrival statuses'

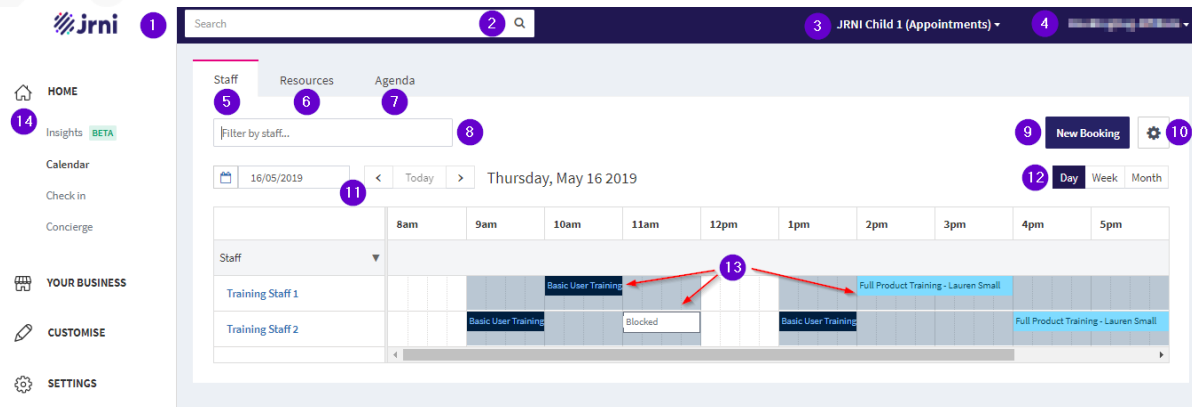
To access this report, follow the below steps:

1. Go to booking reports.
2. Scroll down to the 'single appointments' section.
3. Find the 'Details of every single separate booking including booking questions (all fields) and arrival statuses' report.
4. Click create (ensure you scroll back up to enter a date range.)
5. Click CSV on the date range pop-up.
6. Go into the saved reports tab.
7. Click actions > download.

Your report will download into Excel.

4 Calendar Overview

Users using JRNI on a day to day basis will see and use the calendar screen the most. Users can use this screen for a multitude of tasks such as making bookings, moving bookings, locating bookings and customers and easily viewing availability.



Elements on this screen are listed below:

1. Click on the logo to return to the calendar screen.
2. Use this search bar to search for bookings and customers. You can search using the booking reference, customer reference number, customer email or phone number.
3. If you have access to multiple stores, this switch department function is used to switch to a different location.
4. Click here to log out of JRNI or manage users at the child level.
5. View the calendar by staff member.
6. View the calendar by resources.
7. View bookings in a list format.
8. If you wish to view a specific staff member or resource, use this search bar to filter out exactly who or what calendar you want to view.
9. Click here to make a new booking via the admin journey rather than using the calendar to select a staff/resource, date and time.
10. Click on the cog to change the timezone.
11. Use the arrows to go back and forward 1 day and click on the mini calendar to select a chosen date.
12. View the calendar and agenda for the day, the week, or the month.
13. Appointments will appear on the calendar in different colours depending on the appointment type. Time that has been blocked out will appear as 'blocked'.

14. The options on the sidebar menu allow you to navigate to other areas of JRNI. You will find more information on each of these areas throughout this guide.



[Click here to view a training video about this function](#)

5 Booking and Customer profiles

Booking Profile:

The booking profile page will display all the information related to the booking. The options on this page allow you to view the attendees for the booking and view any notes on the booking.

The screenshot shows the Jrni booking profile page. On the left is a navigation menu with options: HOME, Insights BETA, Calendar, Check in, Concierge, YOUR BUSINESS, CUSTOMISE, and SETTINGS. The main content area is titled 'Basic User Training with Training Staff 1 at My Resource'. It features a 'Booking' tab with three sub-sections: 'Basic Info', 'Booking Questions', and 'Outcomes'. The 'Basic Info' section is highlighted with a purple circle '1'. The 'Booking Questions' section is highlighted with a purple circle '2'. The 'Outcomes' section is highlighted with a purple circle '3'. At the top right of the main content area, there are 'Reschedule' and 'Cancel' buttons, with purple circles '4' and '5' respectively. The 'Basic Info' section contains the following details:

General	
Service	Basic User Training
Customer	Lauren Small
Staff	Training Staff 1
Resource	My Resource
Location	JRNI Child 1 (Appointments)
Date and time	May 23, 2019 9:00 AM
Duration	1 hour

Elements on this screen are listed below:

Under the booking tab, you will see three options:

1. Basic info:

A general overview of the booking.

2. Booking Questions:

View all the answers to the questions that the customer was asked at point of booking.

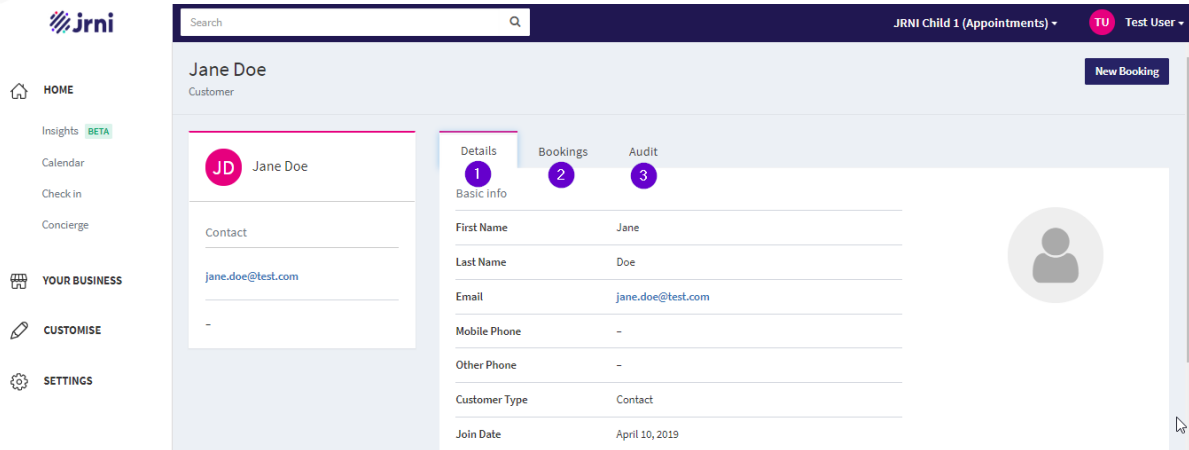
3. Outcomes:

Record information about the appointment outcome once the booking has been completed.

4 & 5. You can also reschedule and cancel bookings from this page. Please see the rescheduling and cancelling bookings sections for more information.

Customer Profile:

The customer profile gives you all the information stored about the customer, including their basic details and any bookings associated with the customer.



The screenshot shows the JRN Customer Profile page for Jane Doe. The page is divided into several sections:

- Header:** JRN logo, search bar, and user information (JRN Child 1 (Appointments), TU Test User).
- Left Sidebar:** Navigation menu with options: HOME, Insights (BETA), Calendar, Check in, Concierge, YOUR BUSINESS, CUSTOMISE, and SETTINGS.
- Customer Profile Card:** Jane Doe, Contact: jane.doe@test.com.
- Details Tab:** Basic info section with fields for First Name (Jane), Last Name (Doe), Email (jane.doe@test.com), Mobile Phone (-), Other Phone (-), Customer Type (Contact), and Join Date (April 10, 2019).
- Bookings and Audit Tabs:** Indicated by numbered circles 2 and 3.
- Profile Picture:** A placeholder icon for the customer's profile picture.

Elements on this screen are listed below:

1. Details:

An overview of all the customer details.

2. Bookings:

View a list of the customers upcoming, past and cancelled bookings. By clicking on the customer booking you will be directed to the booking page explained above.

4. Audit:

View the change log and all emails sent to the customer



[Click here to view a training video about this function](#)

6 Staff Profile

The staff page displays a list of all the staff. From this page, you can edit the staff member, or create new staff. You can click on the staff member to view the details and any bookings associated with that staff member.

The screenshot shows the JRNi Staff page. The sidebar on the left has 'YOUR BUSINESS' and 'Staff' highlighted. The main content area shows a table of staff members. A red callout box points to the 'Create new staff' button in the top right. Another red callout box points to the 'Staff 2' name in the table, with the text 'Click on staff name to view the staff profile and edit the staff details.'

Staff name	Staff ID
Staff 1	15292
Staff 2	15293
Staff 3	15303

When you click on a staff member you will be directed to the staff profile.

The screenshot shows the Staff profile page for 'Trainer 1'. The sidebar on the left has 'Trainer 1' and 'Staff' highlighted. The main content area shows a form with fields for Name, Disabled, Email, Never Mark as Booked, and Queuing disabled. A 'New Booking' button is visible in the top right.

Elements of the staff profile are listed below:

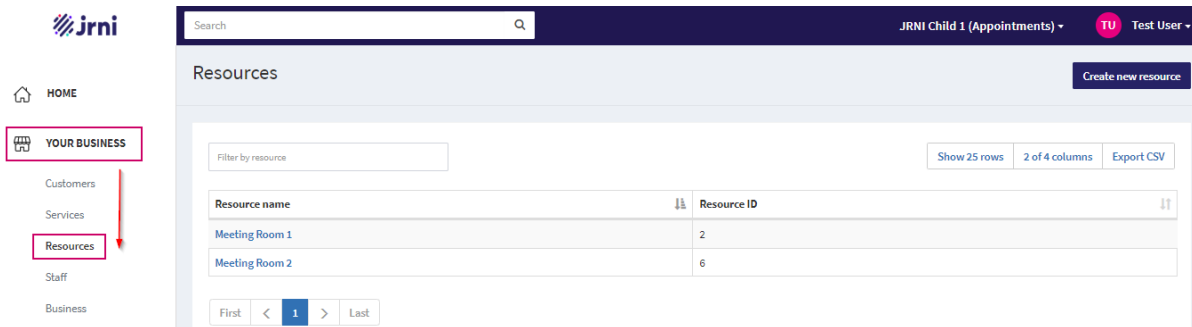
1. Displays basic details about the staff. The email attached to the staff will receive email confirmations when a booking is made with that staff member.
2. Any bookings that have been made with the staff member will be listed under the bookings tab. You can view upcoming, past and future bookings.
3. The calendar will display bookings specifically for that staff.
4. Under the schedule tab, you view when the staff member is available to be booked.
5. N/A
6. View which services the staff member is bookable for.



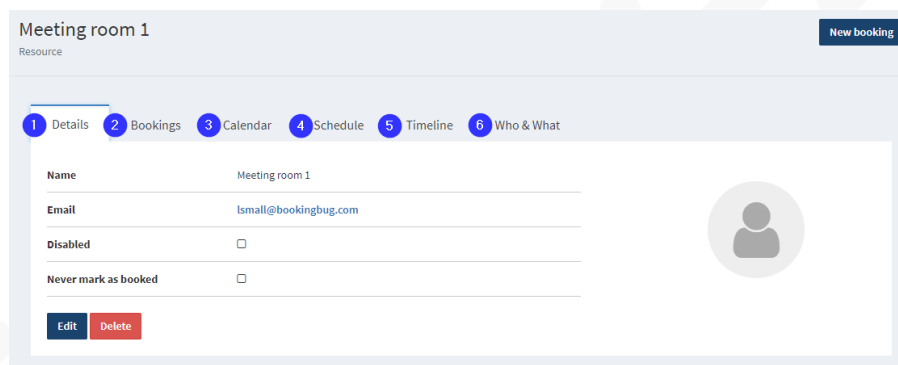
[Click here to view a training video about this function](#)

7 Resource Profile

The resources page will display the list of resources you use. From this page, you can edit the resource, or create new resources. You can click on the resource to view the details and any bookings associated with that resource.



When you click on a resource you will be directed to the resource profile.



Elements of the resource profile are listed below:

1. Displays basic details about the resource. The email attached to the resource will receive email confirmations when a booking is made with that resource.
2. Any bookings that have been made for the resource will be listed under the bookings tab. You can view upcoming, past and future bookings.
3. The calendar will display bookings specifically for the resource.
4. Under the schedule tab, you can set up when the resource is available to be booked.
5. N/A
6. View which services the resource is bookable for.

8 Service Profile

The services page will display the list of services you provide. From this page, you can edit the service, or create new services. You can click on the service to view the details and any bookings associated with that service.

Please note: Ensure you are logged into the correct level when adding a new service. Adding a new service at the parent level (top level) will filter through to all locations/child accounts. If you create the service at the specific location/child level, that service will only be available and at that particular location.

The screenshot shows the JRNi web interface. On the left is a navigation menu with 'HOME', 'YOUR BUSINESS', 'CUSTOMISE', and 'SETTINGS'. Under 'YOUR BUSINESS', 'Services' is highlighted. The main content area is titled 'Services' and contains a table of service entries. Annotations include: a red box around the 'Services' menu item; a red box around the 'Basic User Training' entry in the table with an arrow pointing to it; a red box around the 'Create new service' button in the top right; and a red box around a text label 'Click here to create a new service.' with an arrow pointing to the button. The table has columns for 'Service name', 'Description', and 'Service type'.

Service name	Description	Service type
Basic User Training		fixed_time
Configuration Training		variable_time
Full Product Training		variable_time
API Training		variable_time

9 Creating Bookings

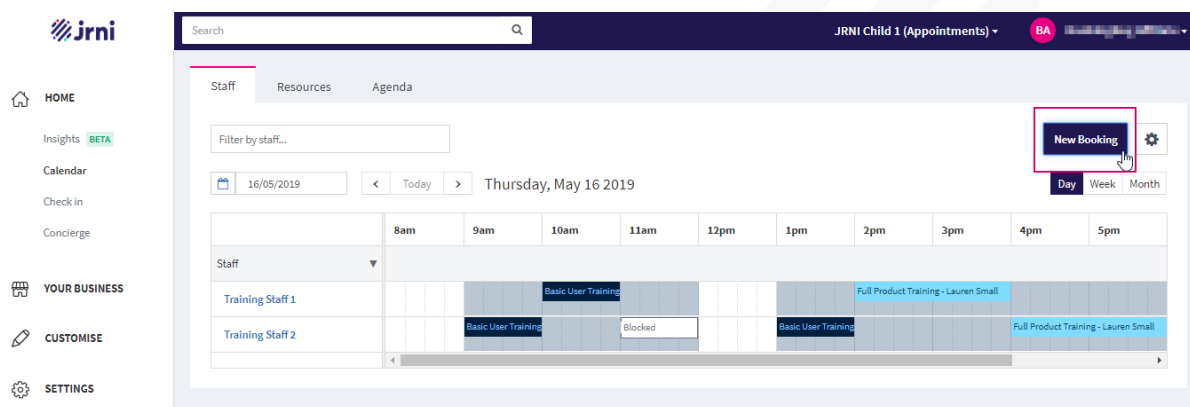
For users to manually create a booking, follow the below steps:

Please note: There are two methods to choose from when making a booking. Please see both methods below and choose the way you feel is better suited to your business model.

Making a booking using the 'New Booking' button:

Step 1: (Method for random allocation of staff and or resources)

- Navigate to the calendar using the side menu options (home > calendar).
- Click on 'New Booking'.



- Select the service required from the drop-down menu. (At this stage you can choose a staff member and or resource or you can leave it blank for JRNI to allocate the booking for you)

The 'Select a service' dialog box is shown. It has a title bar with a close button (X). The 'Service' section has a drop-down menu with the following options: -- select --, -- select --, API Training [disabled], Basic User Training, Configuration Training [disabled], Full Product Training [disabled], and TEST 1 [disabled]. A red arrow points to the first '-- select --' option with a text box that says 'Select the service you wish to book from the drop-down menu.' The 'Resource' section has a drop-down menu with 'Any Resource'. The 'Duration' section has a drop-down menu with 'Any Duration'. A 'Continue' button is located at the bottom right of the dialog.

- Click continue.
- Choose a date and time from the calendar.

Select a date and time ×

📅

◀
▶

Oct 22 to Oct 26, 2019

Any person ▼

Any resource ▼

Tue 22nd	Wed 23rd	Thu 24th	Fri 25th	Sat 26th
AM 3 available	AM 3 available	AM 3 available	AM 3 available	AM 0 available
PM 5 available	PM 5 available	PM 5 available	PM 5 available	PM 0 available

Back

Continue

- Click 'Continue'.

Step 2:

- Enter the customer details.
- If the customer has previously been saved in the system, simply search for the customer and click on their name.
- If they are a new customer, click 'Create new customer' and enter the customer details and click create and add.
- Click 'Continue'.

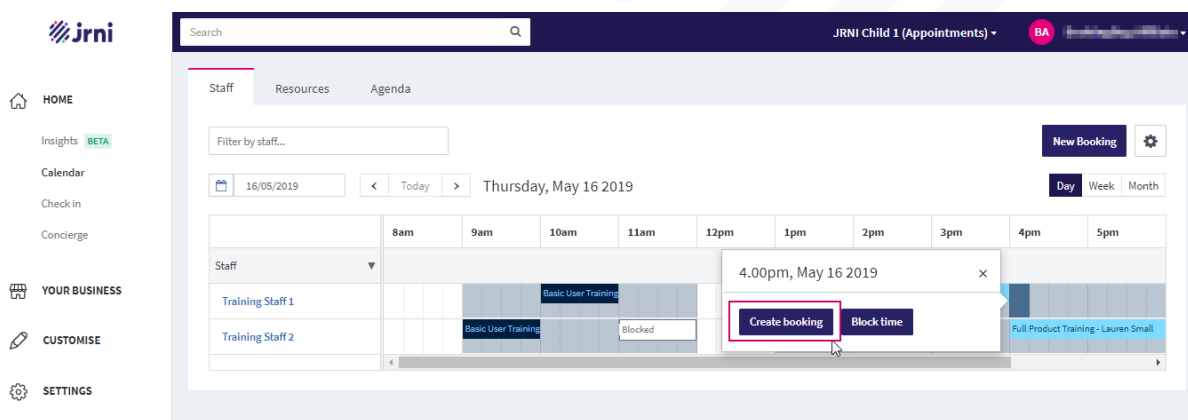
Step 3:

- A confirmation of the booking will then appear. Once you have checked all the details are correct, click close.
- The booking has now been made and a confirmation email will automatically be sent to the customer.

Making a booking using the calendar:

Step 1: (Method when allocating specific staff and or resources from the main calendar page)

- Navigate to the calendar using the side menu options (home > calendar.)
- Choose the staff/ resource you wish to make a booking for.
- Click on the time slot on the calendar and click 'create booking' on the pop-up box that appears.



Step 2:

- You will then be presented with a page where you can select which service you wish to book.
- If you are using resources, you have the option to choose which resource is booked too.
- Choose the service and or resource from the drop-down then click continue.

Select a service



Service

-- select --

-- select --

API Training [disabled]

Basic User Training

Configuration Training [disabled]

Full Product Training [disabled]

TEST 1 [disabled]

Select the service you wish to book from the drop-down menu.

Resource

Any Resource

Duration

Any Duration

Continue

Step 3:

- Enter the customer details.
- If the customer has previously been saved in the system, simply search for the customer and click on their name.
- If they are a new customer, click 'Create new customer' and enter the customer details and click create and add.
- Click 'Continue'.

Step 4:

- A confirmation of the booking will then appear. Once you have checked all the details are correct, click close.
- The booking has now been made and a confirmation email will automatically be sent to the customer.



Click here to view a training video about this function

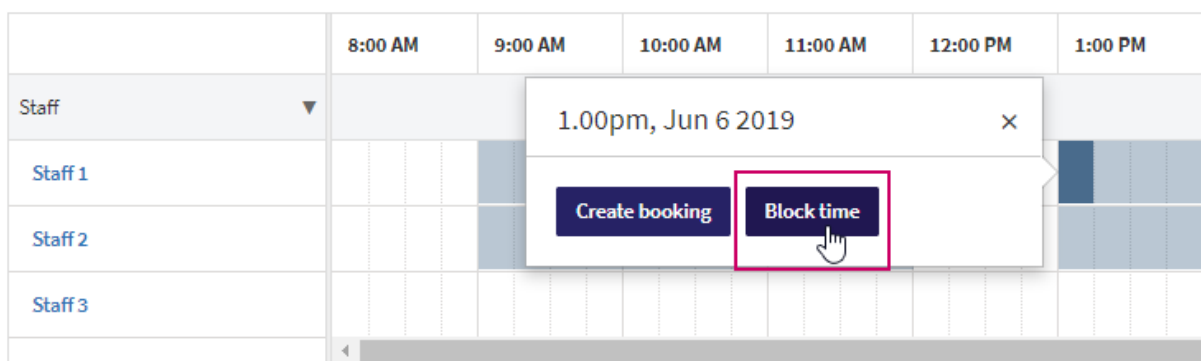
10 Blocking Out Time

Use the block time function to block out specific times in the day, whole days, or multiple days for holidays.

To block out time, follow the below steps:

Step 1:

- Navigate to the calendar using the side menu options (home > calendar).
- Choose the date and time on the calendar that you wish to block and click on the time slot. Click 'Block time'.



Step 2:

- A box will appear where you can select if you want to block for a whole day, or specify the amount of time you wish to block. You can also add a block reason to record why this time has been blocked.

A screenshot of the 'Block Time' form. The form has a title 'Block Time' and a close button (X). It contains the following fields:

- For:** A text input field containing 'Trainer 1'.
- Block whole day:** A toggle switch currently set to 'No'. A red box highlights this toggle, and a red arrow points to it with the text 'Click this toggle to block for whole day'.
- From:** A date and time picker showing '15/02/2019' at '09:00'.
- For:** A duration picker showing '5 Minutes' at '09:05'.
- Reason:** A text input field with the placeholder text 'Please specify a reason'.
- Block Time:** A blue button at the bottom of the form.

To block out multiple days, follow the below steps:

1. Navigate to the calendar page. If you are blocking out multiple days, view the calendar in a month view.
2. Use your mouse to select the days you wish to block out for holiday and click 'Block time'.

06/06/2019 < Today > June 2019 Day Week Month

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	9:00 AM - 10:00 AM Basic User Training - Lauren Si 9:00 AM - 10:00 AM		10:00 AM - 11:00 AM Basic User Training - Fred Flint			
	Jun 12 2019		12	13	14	15
16	17	18	19	20	21	22

3. Select the staff you wish to block time off for.
4. Enter the reason for the time off.
5. Click 'Block time'

Block Time

For: Training Staff 1

Block whole day: No

From: 17/04/2019 00:00 For: 72 Hours 00:00

Reason: Holiday

Block Time



Click here to view a training video about this function

11 Locating Bookings and Customers

To locate a booking or a customer simply use the global search bar at the top of the page. You will be able to locate a booking or customer by searching for the following:

- Booking reference number
- Customer name
- Customer email
- Customer phone number
- Customer reference number

The screenshot displays the jrni system interface. On the left is a navigation menu with sections: HOME (containing Insights BETA, Calendar, Check in, Concierge) and YOUR BUSINESS (containing CUSTOMISE). The main content area features a search bar at the top with the input '13'. A dropdown menu shows 'BOOKINGS' and a search result for 'Booking ref. 13' with details 'Basic User Training | Lauren Small | Order ref. 13'. Below the search is a calendar view for Thursday, May 16, 2019, showing a 'Basic User Training' booking for Training Staff 1 and Training Staff 2.

	8am	9am	10am
Staff			
Training Staff 1		Basic User Training	
Training Staff 2		Basic User Training	

Customer Page:

You can also view a list of customers by clicking on the customer tab in the side menu (Click on 'YOUR BUSINESS' and then 'Customers').

The screenshot displays the JRNi Customer Page. The interface includes a search bar at the top, a side menu on the left with 'YOUR BUSINESS' and 'Customers' highlighted, and a table of customer records. The table has columns for 'Customer name', 'Email', and 'Mobile'. The table contains the following data:

Customer name	Email	Mobile
Alex Test	Alex@test.com	-
Dan Test	Dan@test.com	-
Fred Flintstone	Fred@test.com	-
Jack Test	Jack@test.com	-
Jan Bloggs	Jan@test.com	-
Jane Doe	jane.doe@test.com	-
John Doe	-	-

Elements on this screen are listed below:

1. Use this search bar to search for customers using their name, email or phone number.
2. Change the number of customers you wish to display on one page.
3. Edit which columns you wish to view on this page.
4. Export the customer list into Excel.
5. Use the arrows to change the order in which you view customers from A-Z or Z-A.

12 Rescheduling Bookings

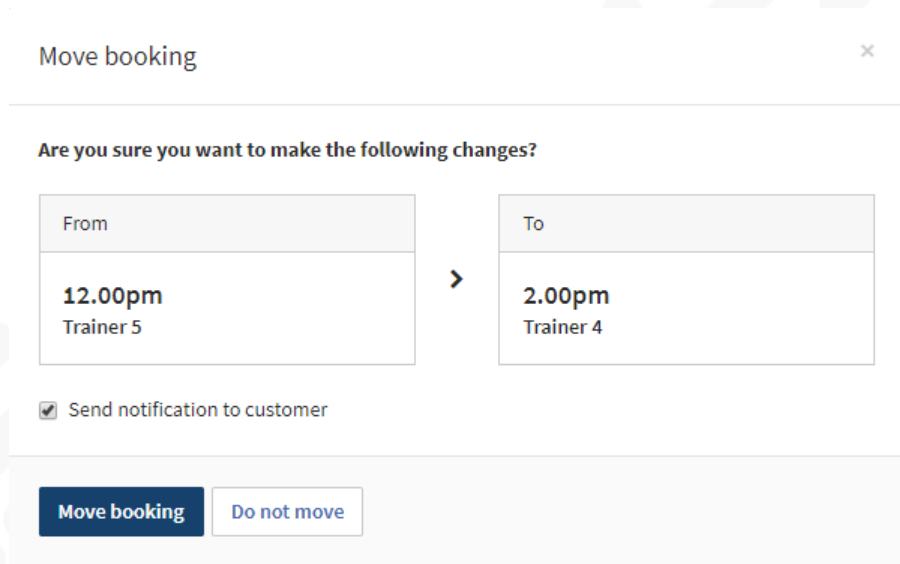
There are a few ways to reschedule a booking inside JRNI such as:

- Drag and drop using the calendar.
- Locating and clicking on the booking from the calendar.
- Locating the booking using the global search bar.

Drag and Drop:

1. Click on the booking you wish to move and simply drag and drop the booking into the new time slot, staff member or resource. If moving a booking to a different day, change the calendar view to a week or a month. (If you are rescheduling a booking beyond this date you should search for the booking and reschedule from the booking profile page.)

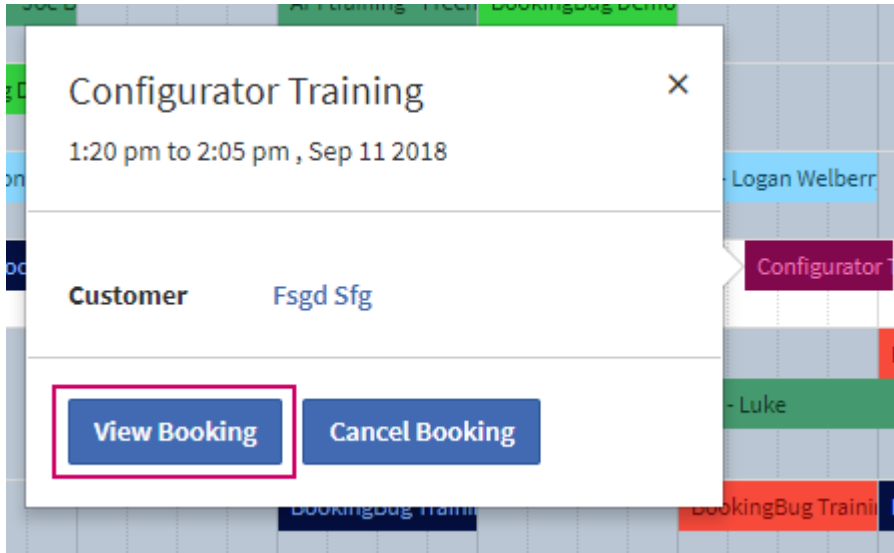
2. A pop-up box will appear asking if you are sure you wish to move the booking to the new chosen time, day, staff member, or resource. Ensure the details are correct and click 'Move booking'.



The screenshot shows a 'Move booking' dialog box with a close button (x) in the top right corner. The main heading is 'Are you sure you want to make the following changes?'. Below this, there are two columns: 'From' and 'To', separated by a right-pointing arrow (>). The 'From' column contains '12.00pm' and 'Trainer 5'. The 'To' column contains '2.00pm' and 'Trainer 4'. Below these columns is a checkbox labeled 'Send notification to customer' which is checked. At the bottom, there are two buttons: 'Move booking' (in a dark blue box) and 'Do not move' (in a white box with a grey border).

Reschedule booking from the calendar:

1. Click on the booking you wish to move from the calendar.
2. Click 'View Booking' on the pop up that appears.



3. You will be presented with the booking profile. Click 'Reschedule' then choose the new time and date or staff/resource you wish to move the booking to.

Select a date and time ×

Sep 24 to Sep 28, 2018 Trainer 1 Any resource

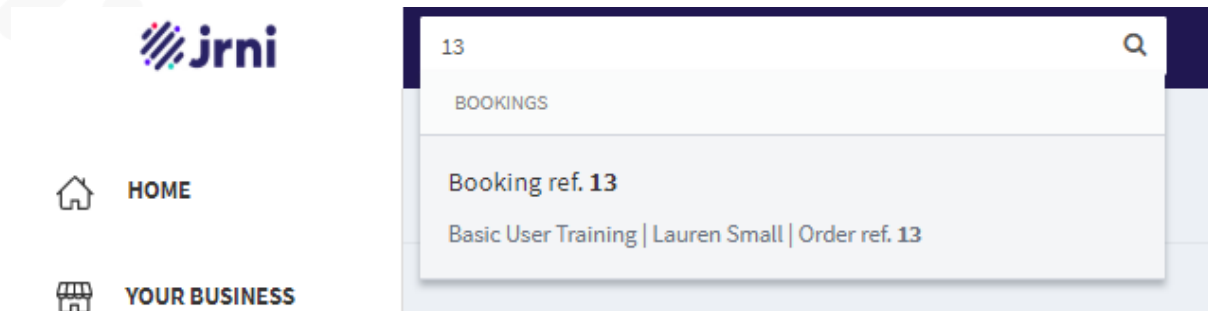
Mon 24th	Tue 25th	Wed 26th	Thu 27th	Fri 28th
AM 2 available	AM 0 available	AM 2 available	AM 2 available	AM 2 available
PM 3 available	PM 0 available	PM 3 available	PM 3 available	PM 3 available

Send notification to customer

Move Booking

Reschedule by searching for booking:

1. Using the global search bar, enter the booking reference number.



2. Click on the booking you wish to reschedule.

3. You will be presented with the booking profile. Click 'Reschedule' then choose the new time and date or staff/resource you wish to move the booking to.



[Click here to view a training video about this function](#)

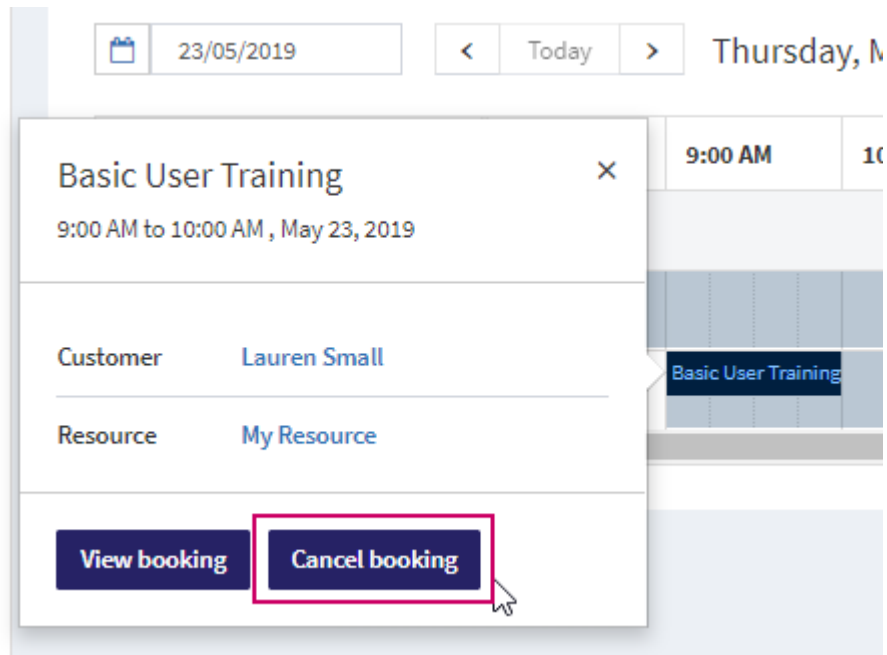
13 Cancelling Bookings

You are able to cancel a booking in the same ways you can reschedule a booking, either from the calendar or from locating the booking via the search bar.

To cancel a booking, follow the below steps:

From the calendar:

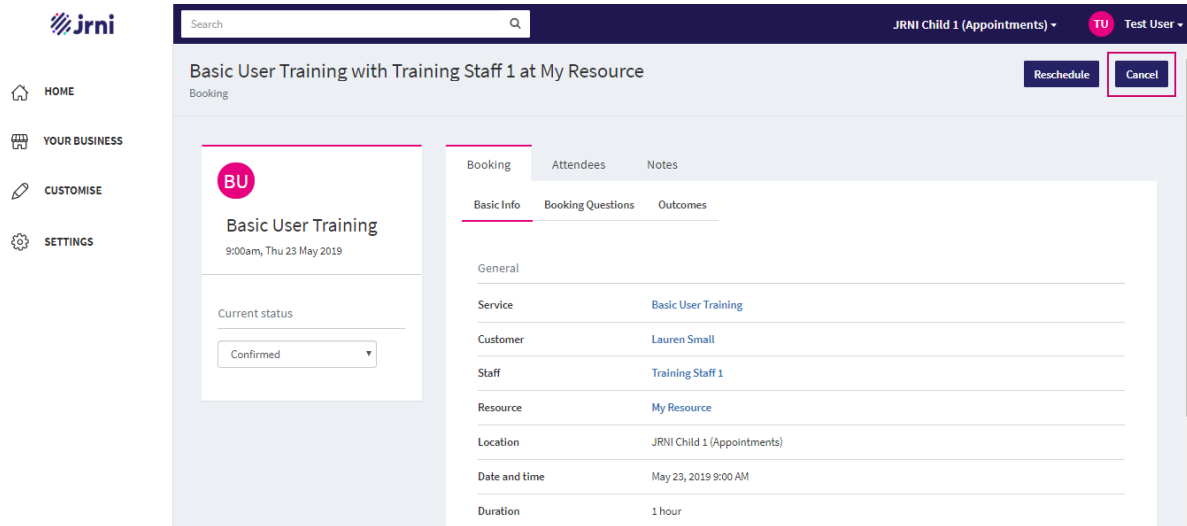
1. Locate booking on the calendar and click 'Cancel booking'.



2. If you wish to send a notification to the customer, tick the send notification box and enter a cancellation reason if you want to record the reason.

From the search bar:

1. Search for the booking you wish to cancel using the search bar.
2. You will be presented with the booking profile. Click 'Cancel'.



The screenshot shows the Jrni web application interface. On the left is a navigation menu with options: HOME, YOUR BUSINESS, CUSTOMISE, and SETTINGS. The main content area displays a booking profile for 'Basic User Training' scheduled for 9:00am on Thursday, 23 May 2019. The current status is 'Confirmed'. On the right side of the booking profile, there are tabs for 'Booking', 'Attendees', and 'Notes'. Under the 'Booking' tab, there are sub-tabs for 'Basic Info', 'Booking Questions', and 'Outcomes'. The 'Basic Info' sub-tab is active, showing a 'General' section with the following details:

General	
Service	Basic User Training
Customer	Lauren Small
Staff	Training Staff 1
Resource	My Resource
Location	JRNI Child 1 (Appointments)
Date and time	May 23, 2019 9:00 AM
Duration	1 hour

At the top right of the booking profile, there are two buttons: 'Reschedule' and 'Cancel'. The 'Cancel' button is highlighted with a red box.

3. If you wish to send a notification to the customer, tick the send notification box and enter a cancellation reason if you want to record the reason.



Click here to view a training video about this function

14 Configuration

This section of the guide focuses on the configuration and will give you information on how to:

- Create and edit services
- Create and edit staff and staff schedules
- Create and edit resources and resource schedules
- Create and edit customer and booking questions
- Notification Settings

15 Creating and Editing Services

Creating a new service:

1. Navigate to the service page by clicking on 'YOUR BUSINESS' > 'Services' then click on 'create new service' and enter the details under the Basic tab. Each section that requires an explanation will have help text underneath to assist you in filling out the details.

The screenshot shows the 'Create new service' form with the 'Basic' tab selected. The form is divided into two main sections: 'General' and 'Time settings'.
General section:
- **Name:** A required text input field with a red border and a small 'x' icon.
- **Description:** A text input field with a small icon on the right.
- **Disabled:** A dropdown menu with 'No' selected.
- **Duration:** A dropdown menu with '1hr' selected. Below it is a small text label: 'The actual duration/time interval of a slot of this service'.
- **Reference:** A text input field.
Time settings section:
- **Minimum advance:** A dropdown menu with 'All Customers' selected, followed by 'cannot book less than', a text input with '0', a dropdown with 'Months', and 'in advance'.
- **Maximum advance:** A dropdown menu with 'All Customers' selected, followed by 'cannot book more than', a text input with '60', a dropdown with 'Days', and 'in advance'.
- **Minimum cancel:** A dropdown menu with 'All Customers' selected, followed by 'cannot cancel less than', a text input with '1', a dropdown with 'Days', and 'in advance'.
- **Disable before date:** A date picker field with a calendar icon. Below it is the text: 'Set a date to have this service disabled until a specific date'.
- **Disable after date:** A date picker field with a calendar icon. Below it is the text: 'Set a date from when this service will be disabled from being booked'.
At the bottom left are 'Save' and 'Cancel' buttons.

2. Before clicking save, scroll back to the top and enter the details on the 'advanced' tab.

The screenshot shows the 'Create new service' form with the 'Advanced' tab selected. The form is divided into two main sections: 'General' and 'Time settings'.
General section:
- **Minimum length:** A text input with '1'. Below it is the text: 'The minimum number of times in a row the customer can book'.
- **Maximum length:** A text input with '1'. Below it is the text: 'The maximum number of times in a row the customer can book'.
- **Question group:** A dropdown menu with 'No Questions' selected. Below it is the text: 'Which question set do you wish to ask for this service'.
Time settings section:
- **Booking time step:** A dropdown menu. Below it is the text: 'The time step in which this service is bookable by customers'.
- **Listed duration:** A dropdown menu. Below it is the text: 'How long do you tell the customer the booking lasts. For example, the duration might be 45 minutes, however, you want to display the duration as 60 minutes on your widget'.
At the bottom left are 'Save' and 'Cancel' buttons.

Edit service:

1. Click on the service you wish to edit on the service page and click 'Edit'. Please note, you will not be able to edit a service at child level if it has been created at parent level so you will need to ensure you are logged into the level that the service was created at in order to edit the service.



[Click here to view a training video about this function](#)

16 Creating and Editing New Staff

Creating a new staff member:

Please note: Staff are usually configured at the location/child level. Ensure you are creating staff at the correct level.

1. Navigate to the staff member page by clicking on 'YOUR BUSINESS' > 'Staff' then click on 'create new staff'.
2. Enter the staff details. If you enter the staff email address, they will receive a confirmation when a booking has been made with them.
3. Click save.
4. Once you have saved the staff member, you then need to set up their schedule and configure the 'What & Where' to set up when the staff member is available and what services they are bookable for.

Setting up the staff schedule:

1. Click on the staff member you have created to view the profile and click on the 'schedule' tab.
2. Click on 'create schedule'.
3. You will see a blank calendar appear. Use your mouse to select the day and time the staff member is available from and drag and drop to the time they are available to. For example, drag your mouse from Monday - Friday, 9am - 5pm.
4. The below shift pattern pop up will then appear to give you the flexibility to set up a schedule for specific days of the week, giving you options to select how often that shift pattern occurs and when the shift pattern ends.

If you have different availability on different days, you can set up a separate schedule. The below example shows a shift pattern of 9am - 6pm on Monday - Wednesday and a separate shift pattern for 10am - 4pm on Thursday and Friday.

New Shift Pattern ×

Start Date

Start Time : End Time :

Repeats

Interval

Repeat On

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

End

New Shift Pattern ×

Start Date

Start Time : End Time :

Repeats

Interval

Repeat On

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

End

Elements of the shift pattern page are listed below:

Start date:

The date you wish the shift pattern start.

Start time:

The time the staff member is available from.

End time:

The time the staff member is available to. Please note, If this was set to 5pm, no bookings can be made after 5pm, bookings can only be made up to 5pm.

Interval:

Allows you to set up the number of intervals the shift pattern occurs. The example above is set up so the schedule will occur every week. If the interval was set to 2 it would be set up to biweekly, set to 3, every 3 weeks and so on.

Repeat on:

Allows you to set up how many times the schedule repeats. For example if repeat was set to 3, the schedule would run 3 times.

End:

Select when the schedule will end. There are three options to choose from when selecting an end date:

- Never
- Specific date
- After x occurrences

End

This means the schedule will continue with no end date.

End
 End Date

Choose a date you wish the schedule to end.

End
 Repeat Count

The schedule will run x amount of times. For example, this schedule will run 4 times. Using the example above, the interval is set up for once a week, so if 'after x occurrences' is set to 4, the schedules will run for 4 weeks.

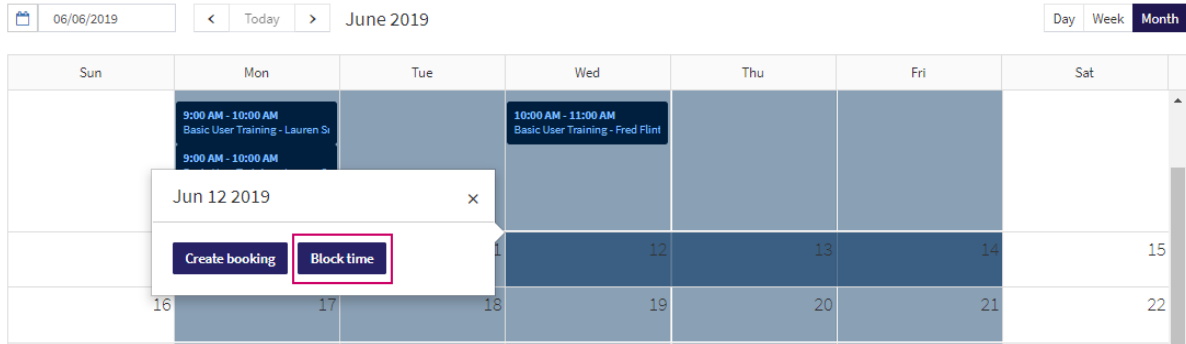


Click here to view a training video about this function

Setting up Holidays / Time Off:

To block out time for holidays, you must use the calendar page. This is not done via the staff schedule. Follow the below steps to enter staff holidays:

1. Navigate to the calendar page. If you are blocking out multiple days, view the calendar in a month view.
2. Use your mouse to select the days you wish to block out for holiday and click 'Block time'.



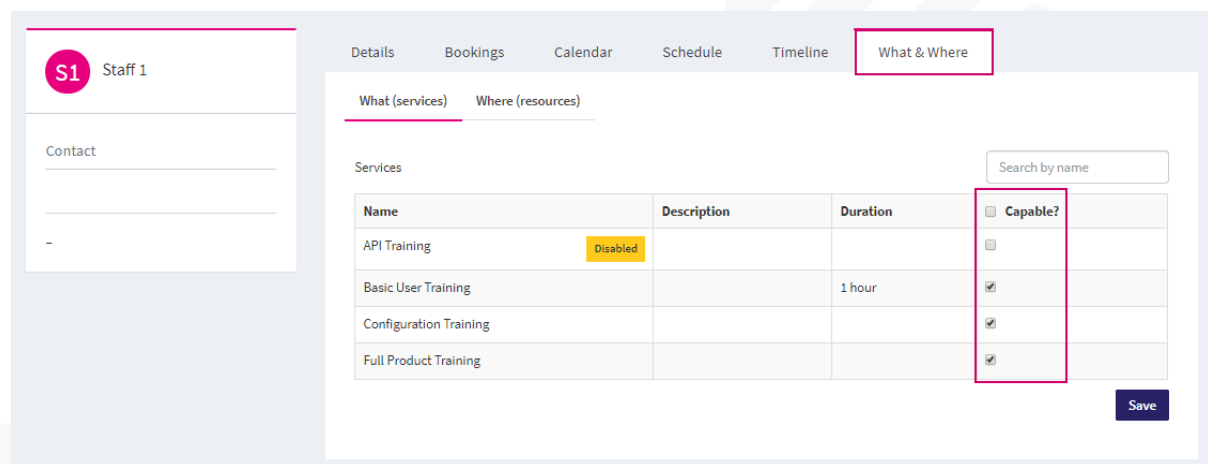
3. Select the staff you wish to block time off for.
4. Enter the reason for the time off.
5. Click 'Block time'

The screenshot shows the 'Block Time' form. The 'For' field is set to 'Training Staff 1', 'Block whole day' is set to 'No', 'From' is 17/04/2019 00:00, 'For' is 72 Hours, and 'Reason' is 'Holiday'. The 'Block Time' button is highlighted in a red box.

Setting up the What & Where:

The What & Where allows you to configure which services the staff member is able to take bookings for, and which resources they are able to use. Follow the below steps to configure the What and Where:

1. Navigate to the staff member profile.
2. Click on What & Where.
3. Tick the services and resources the staff member is bookable for.



The screenshot shows the 'What & Where' configuration page for a staff member. The page is divided into two main sections: 'What (services)' and 'Where (resources)'. The 'What (services)' section is active and contains a table of services. The 'Where (resources)' section is currently empty. The 'What (services)' table has the following data:

Name	Description	Duration	Capable?
API Training	Disabled		<input type="checkbox"/>
Basic User Training		1 hour	<input checked="" type="checkbox"/>
Configuration Training			<input checked="" type="checkbox"/>
Full Product Training			<input checked="" type="checkbox"/>

The 'Capable?' column is highlighted with a red box. A 'Save' button is located at the bottom right of the page.

Edit staff member:

To edit anything associated with the staff member, follow the below steps:

1. Click on the staff member you wish to edit and click 'Edit' on the staff profile to edit the staff details.
2. To edit the schedule, click on the schedule on the staff member profile and click on the current schedule to make changes and click save.
3. To edit the What & Where, click on the What & Where tab to make changes and click save.

17 Creating and Editing Resources

Creating a new resource:

Please note: Resources are usually configured at the location/child level. Ensure you are creating the resource at the correct level.

1. Navigate to the resources page by clicking on 'YOUR BUSINESS' > 'Resources' then click on 'create new resource'.
2. Enter the resource details. If you enter an email address, this email will receive a confirmation when a booking has been made
3. Click save.
4. Once you have saved the resource, you can set up the schedule and configure the Who & What to set up when the resource is available, what services they are bookable for and which staff members can be booked with the resource.

Setting up the resource schedule:

1. Click on the resource you have created to view the profile and click on the 'schedule' tab.
2. Click on 'create schedule'.
3. You will see a blank calendar appear. Use your mouse to select the day and time the resource is available from and drag and drop to the time it is available to. For example, drag your mouse from Monday - Friday, 9am - 5pm.
4. The below shift pattern pop up will then appear to give you the flexibility to set the schedule up for specific days of the week, giving you options to select how often that shift pattern occurs and when the shift pattern ends.
5. If you have different availability on different days, you can set up a separate schedule. The below example shows a shift pattern of 9am - 6pm on Monday - Wednesday and a separate shift pattern for 10am - 4pm on Thursday and Friday.

New Shift Pattern ×

Start Date

Start Time : End Time :

Repeats

Interval

Repeat On

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

End

New Shift Pattern ×

Start Date

Start Time : End Time :

Repeats

Interval

Repeat On

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

End

Elements of the shift pattern page are listed below:

Start date:

The date you wish the shift pattern start.

Start time:

The time the resource is available from.

End time:

The time the resource is available to. Please note, If this was set to 5pm, no bookings can be made after 5pm, bookings can only be made up to 5pm.

Interval:

Allows you to set up the number of intervals the shift pattern occurs. The example above is set up so the schedule will occur every week. If the interval was set to 2 it would be set up to biweekly, set to 3, every 3 weeks and so on.

Repeat on:

Allows you to set up how many times the schedule repeats. For example if repeat was set to 3, the schedule would run 3 times.

End:

Select when the schedule will end. There are three options to choose from when selecting an end date:

- Never
- Specific date
- After x occurrences

End

This means the schedule will continue with no end date.

End
 End Date

Choose a date you wish the schedule to end.

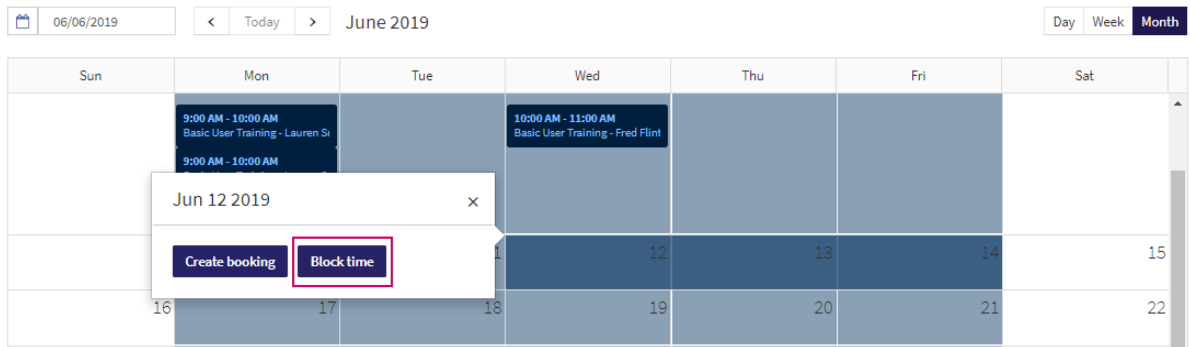
End
 Repeat Count

The schedule will run x amount of times. For example, this schedule will run 4 times. Using the example above, the interval is set up for once a week, so if 'after x occurrences' is set to 4, the schedules will run for 4 weeks.

Blocking the resource:

To block out time, you must use the calendar. This is not done via the resource schedule. Follow the below steps to block out time:

1. Navigate to the calendar page. If you are blocking out multiple days, view the calendar in a month view.
2. Use your mouse to select the days you wish to block and click 'Block time'.



3. Select the resource you wish to block time off for.
4. Enter the reason for the blocked time.
5. Click 'Block time'

Block Time

For
My Resource

Block whole day **No**

From 16/04/2019 : **For** 72 Hours :

Reason
Test

Block Time

Setting up the Who & What:

The Who & What allows you to configure which services the resource is able to take bookings for and which staff members can use the resource.

Follow the below steps to configure the Who & What.

1. Navigate to the resource profile.
2. Click on Who & What.
3. Tick the services and staff members the resource is bookable for.

Meeting Room 1
Resource

New booking

Details Bookings Calendar Schedule Timeline Who & What

Who What (services)

People

Name	<input type="checkbox"/> Capable?
Staff 1	<input checked="" type="checkbox"/>
Staff 2	<input checked="" type="checkbox"/>
Staff 3	<input checked="" type="checkbox"/>
Staff 4	<input checked="" type="checkbox"/>

Save

Edit Resource:

To edit anything associated with the resource, follow the below steps:

1. Click on the resource you wish to edit and click 'Edit' on the resource profile to edit the resource details.
2. To edit the schedule, click on the current schedule to make changes and click save.
3. To edit the Who & What, click on the Who & What tab to make changes and click save.

18 Booking & Customer Questions

Booking and customer questions are used to gather information from the customer prior to their appointment.

How to create booking and customer questions:

The screenshot shows the Jrni system interface. The sidebar on the left has 'CUSTOMISE' and 'Booking Journey' highlighted. The main content area shows the 'Booking Questions' tab selected. Below the tabs, there is a table of existing booking questions:

Question	Question Type	Default value	Position	Actions
Reason for training?	Drop Down List	-	▲ ▼	Actions ▼
Have you had JRNI training before?	Radio Button	-	▲ ▼	Actions ▼

1. From the sidebar, click on 'CUSTOMISE' then 'Booking Journey'.
2. Click on the 'Booking Questions' tab to create a booking question, or the 'Customer Question' tab to create a customer question.
3. Click 'create new' on the right-hand side.
4. Enter the details on the below page:

Booking Questions

The 'Create Model' form for creating a booking question includes the following fields and options:

- Question: [Text input field]
- Question Type: [Dropdown menu, currently set to 'Text Field']
- Default Value: [Text input field]
- Required: (If selected, booking customer must enter a value for this, or if a checkbox, it must be ticked)
- Important: (If selected, this detail will be included in SMS confirmations)
- Admin only: (Only ask this question when making admin bookings, and don't include in emails to the customer)
- Help text: [Text area]
- optional extra details
- Conditional question: [Dropdown menu, currently set to 'None']

- You can choose a question type such as a drop-down, or a check-box.

- The default value is what will appear in the answer box if you wanted to have a defaulted answer.
- Tick the 'required' box if you want the question to be mandatory.
- The help text will appear below the question to give examples of how the customer should answer the question.

Conditional Questions:

Conditional questions are like follow-up questions. They allow you to set up a follow up question based on the answer given in the previous question.

Creating Conditional Questions:

1. Create the question you wish to ask based on the answer to the previous question.
2. From the drop-down list for 'conditional question' select the question that will be asked before the question you are creating.
3. Select the conditional answer, so that when a customer chooses that answer, the question you are creating will be the question that will be asked next, based on the answer given in the previous question.

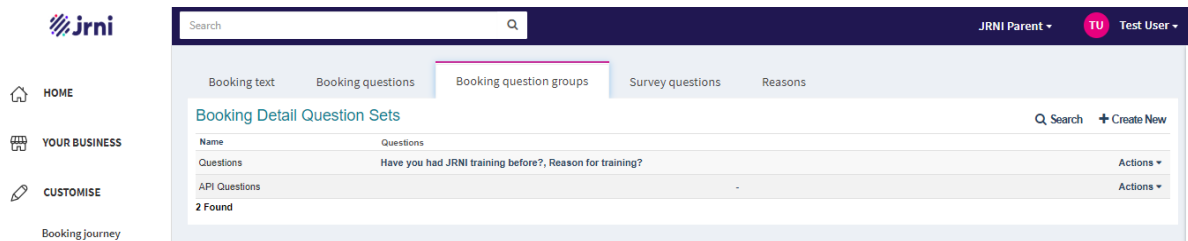
see example below:

The screenshot displays a configuration form for a question. At the top, the 'Question' field contains 'Reason for training?' and the 'Reference' field contains 'reason_for_training'. Below these, there is a 'Reference change confirmation' checkbox which is unchecked. The 'Question Type' is set to 'Drop Down List'. A section titled 'Choices (Hide)' contains a table with columns for 'Position', 'Item', and 'Default'. The first row has 'Refresher' as the item and is marked as the default. The second row has 'Other' as the item. There are 'REMOVE' buttons next to each item. Below the choices, there are three checkboxes: 'Required' (unchecked), 'Important' (unchecked), and 'Admin only' (unchecked), each with a brief description of its function. A 'Help text' field is present but empty. At the bottom, the 'Conditional question' dropdown is set to 'Have you had JRNI training before?' and the 'Conditional answers' are 'Yes' (checked) and 'No' (unchecked).

Question Groups:

Once you have created your questions, you must add them to the group of questions they belong to. This comes in to play when you create a service, you can select the question group on the service so it will trigger that particular set of questions for the service being booked.

Create a question Group:



Name	Questions	Actions
Questions	Have you had JRNi training before?, Reason for training?	Actions
API Questions	-	Actions

2 Found

1. From the sidebar, click on 'CUSTOMISE' then 'Booking Journey'.
2. Click on the 'Booking Questions Group' tab.
3. Click 'create new' on the right-hand side and enter the name of the question group and add the questions you wish to ask to the group.

Note: All the conditional questions must be added to the group too.



Click here to view a training video about this function

19 Notification Settings

The notification page will allow you to configure a number of options such as basic email and SMS settings, send and receive settings and edit the email and SMS content.

The screenshot displays the Jrni Notification Settings interface. On the left, a sidebar contains navigation links: HOME, YOUR BUSINESS, CUSTOMISE, SETTINGS (highlighted with a red box), Basic settings (highlighted with a red box and a red arrow pointing down), Advanced settings, and Integrations. At the bottom of the sidebar is a 'Give feedback' link. The main content area is titled 'Notifications' and is divided into three sections: Email, SMS, and Social. The Email section includes 'Basic Settings' (Configure your basic email settings including your address), 'Send And Receive' (Select the automated email communications you send and receive), and 'Customise Emails' (Customise the content of your email communications). The SMS section includes 'Send And Receive' (Select the automated SMS communications you send and receive), 'SMS Marketing' (Communicate with your customers using SMS), and 'Customise SMS' (Customise the content of your SMS communications). The Social section includes 'Social Sharing' (Let customers share their bookings on Twitter and Facebook) and 'Customise' (Customise the content of your social communications). Each card in the Email, SMS, and Social sections has an 'Edit' or 'Customise' button with a right-pointing arrow. The top navigation bar includes 'Services', 'Events', 'Resources', 'Bookings', 'Staff', and 'Notifications' (highlighted with a red box). A search bar is located at the top left of the main content area.

Please note: Social notification settings are an additional add on and would need to be scoped out during your implementation.

Edit email and SMS content:

1. Click on customise email or SMS tab
2. Choose the email or SMS you wish to edit and click customise. (You must be competent with HTML in order to edit your email and SMS content.)