Training Manual

User and Configuration

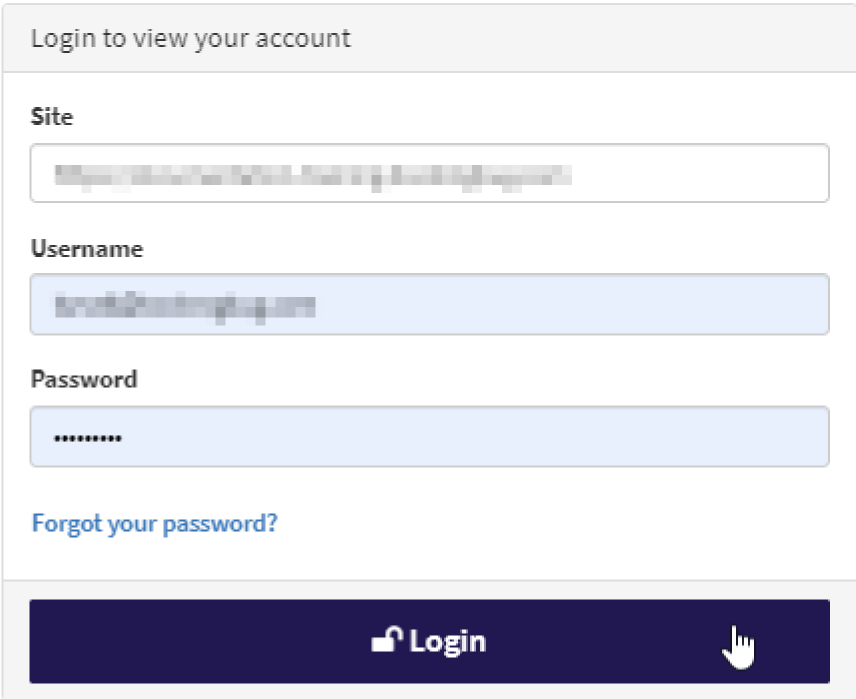
REVIEW: 01/07/2020

Contents

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.

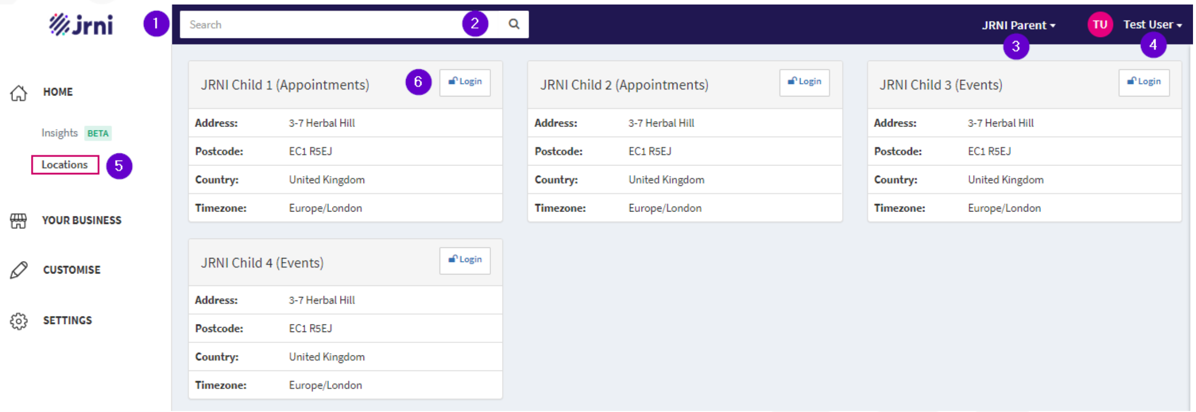


Once you have entered your details and click the login button you will have the option to either log into a particular location, or administer parent level. (See 'Parent Level Overview Section for more details) 4

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.



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'

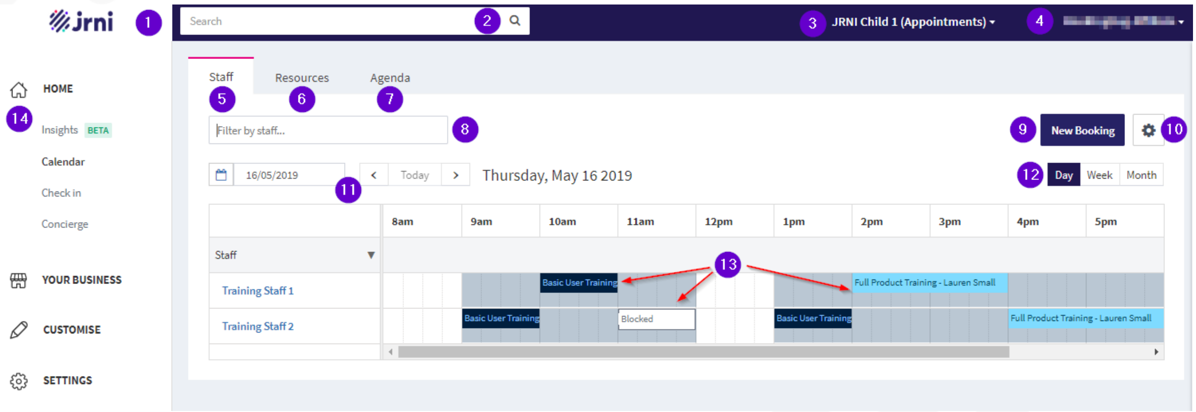
To access this report, follow the below steps:

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 rage.)
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'.

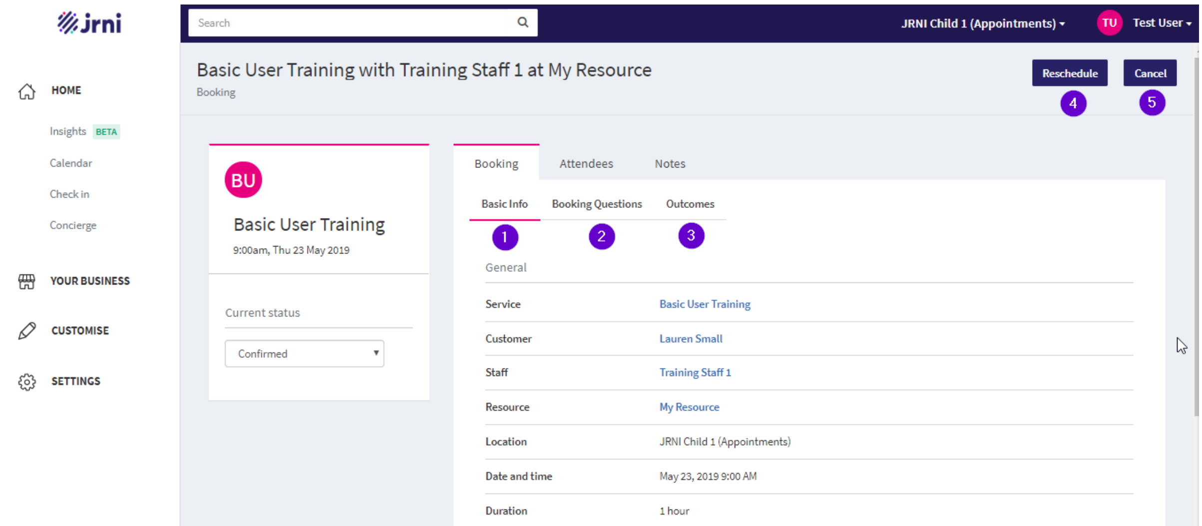
14. The options on the sidebar menu allow you to navigate to other areas of JRNI. You will find more information on each of these areas throughout this guide.

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.



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.

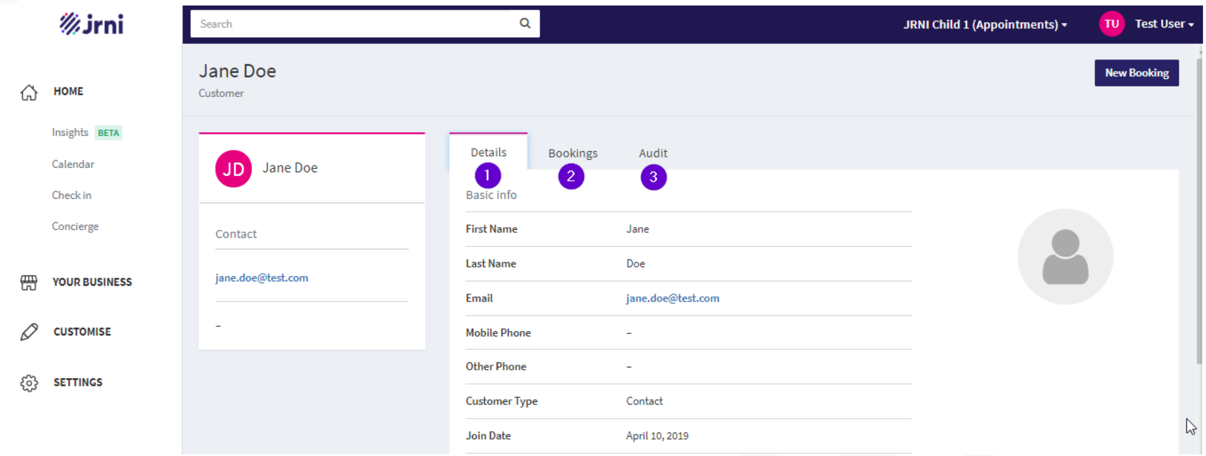
2. Booking Questions:
View all the answers to the questions that the customer was asked at point of booking.

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.



Elements on this screen are listed below:

1. Details:
An overview of all the customer details.

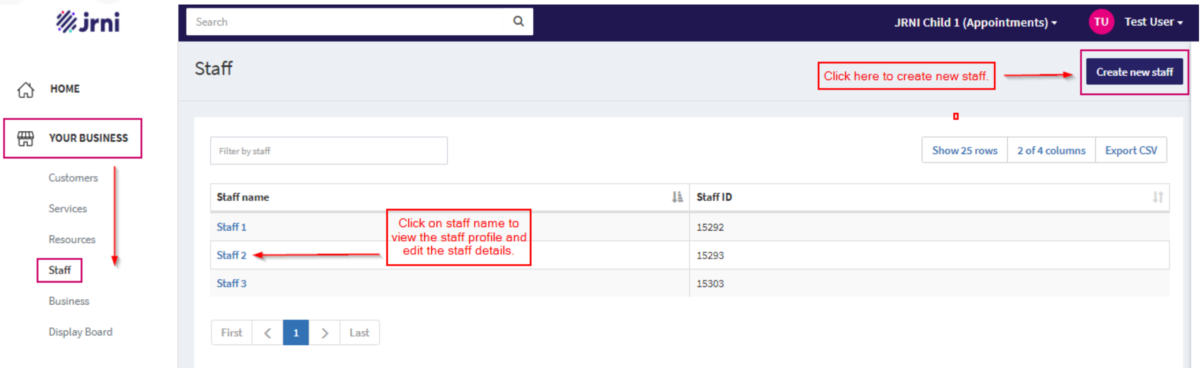
2. Bookings:
View a list of the customers upcoming, past and cancelled bookings. By clicking on the customer booking you will be directed to the booking page explained above.

4. Audit:
View the change log and all emails sent to the customer

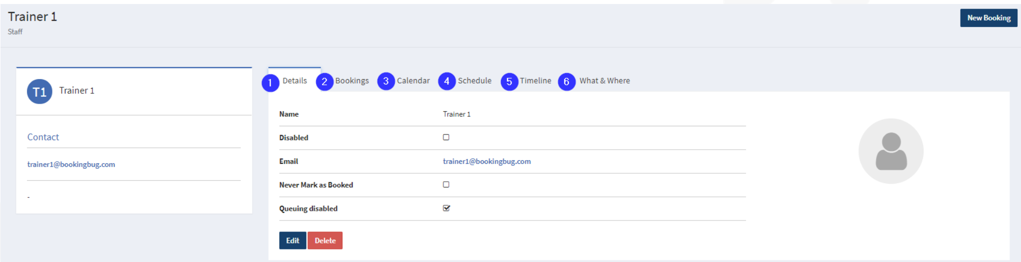
Click here to view a training video about this function

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.



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



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.

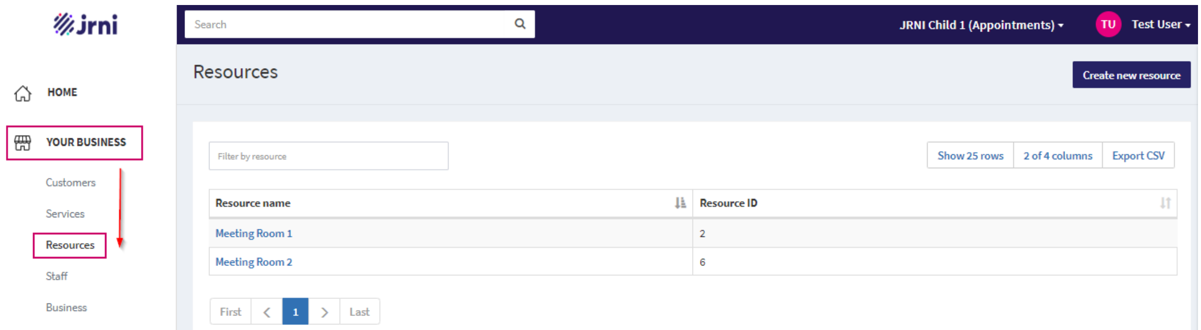
5. N/A

6. View which services the staff member is bookable for.

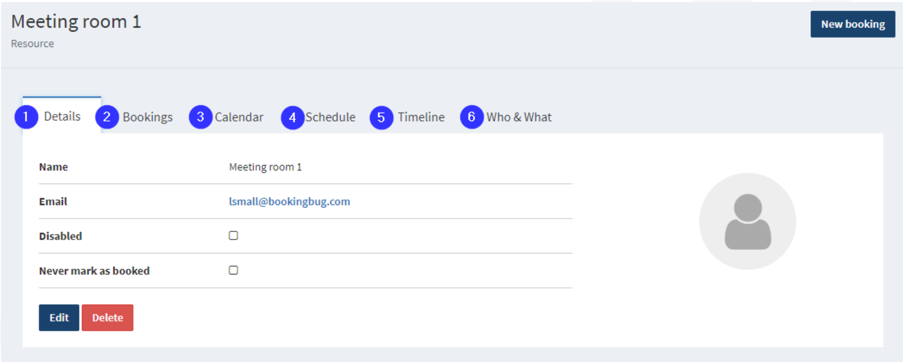
Click here to view a training video about this function

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.

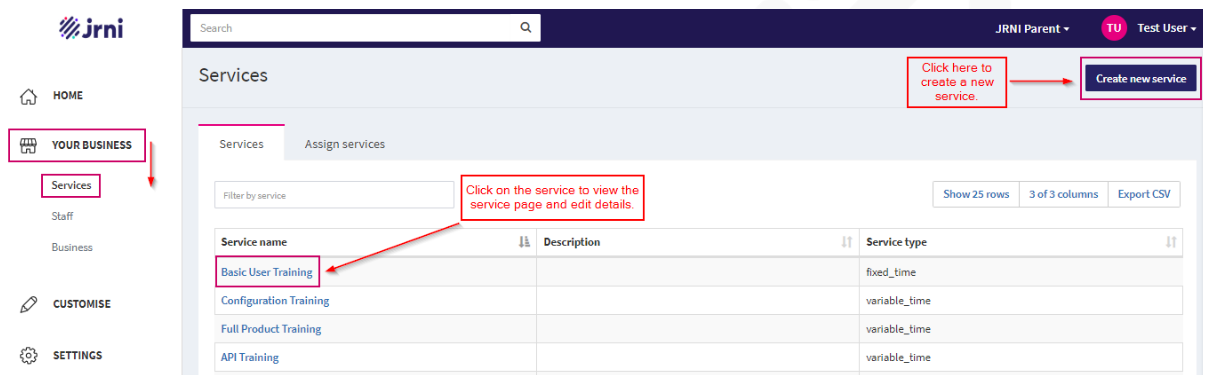
5. N/A

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.



9 Creating Bookings

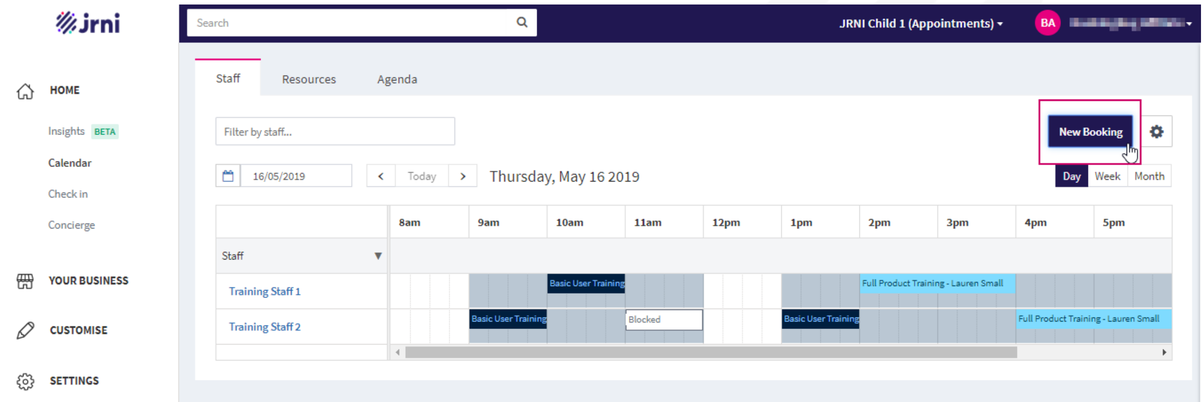
For users to manually create a booking, follow the below steps:

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.

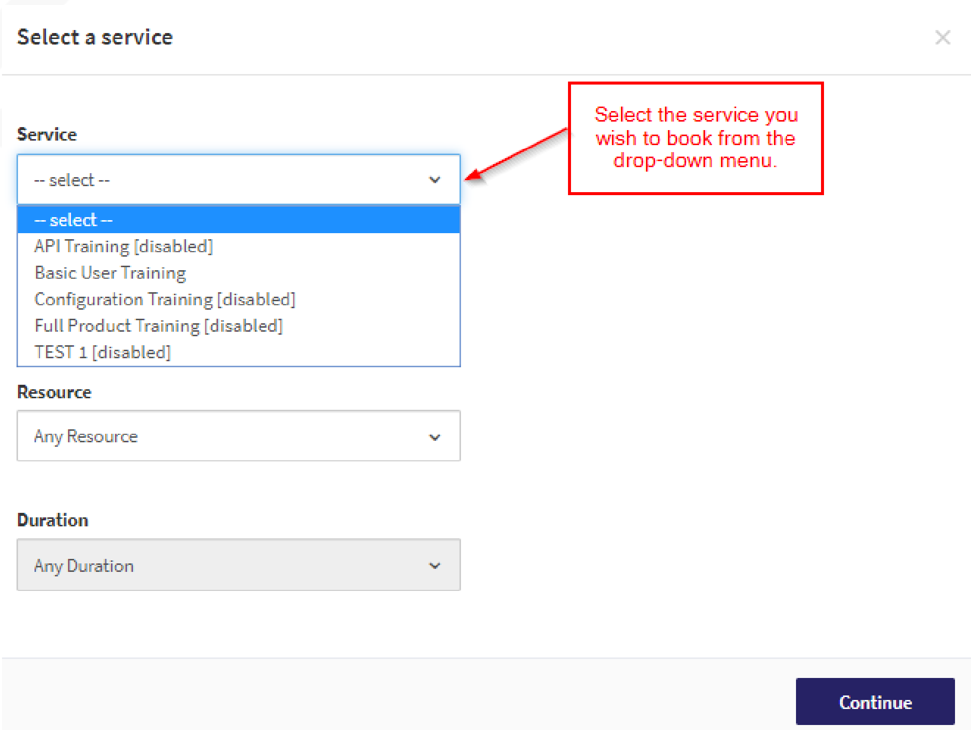
Making a booking using the 'New Booking' button:

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'.

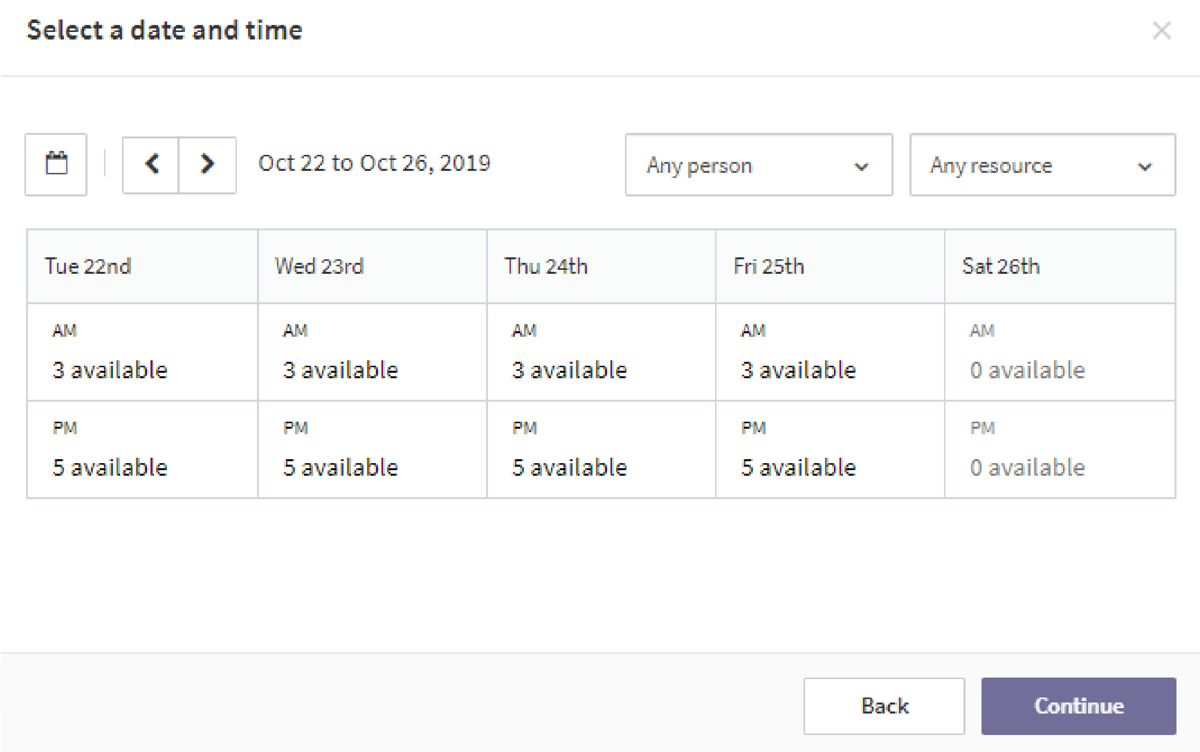


- Select the service required from the drop-down menu. (At this stage you can choose a staff member and or resource or you can leave it blank for JRNI to allocate the booking for you)



• Click continue.

• Choose a date and time from the calendar.



• 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:

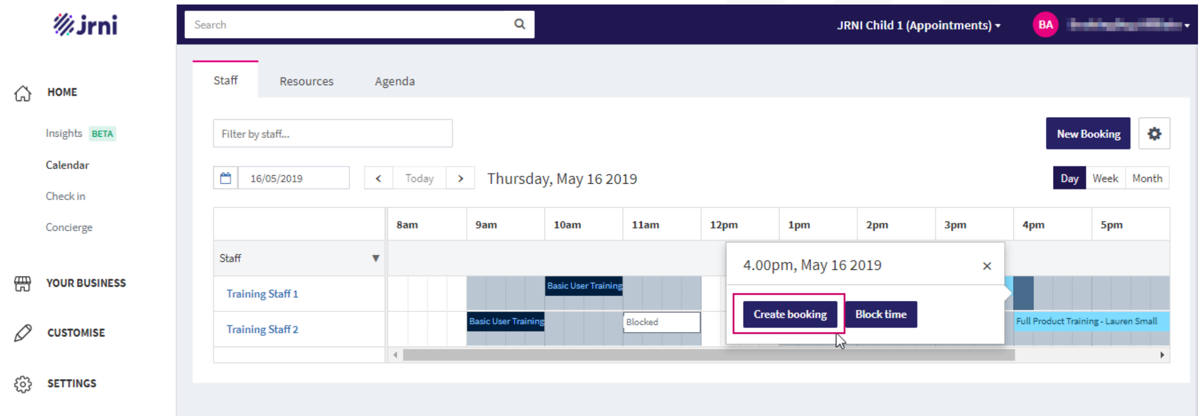
• A confirmation of the booking will then appear. Once you have checked all the details are correct, click close.

• The booking has now been made and a confirmation email will automatically be sent to the customer.

Making a booking using the calendar:

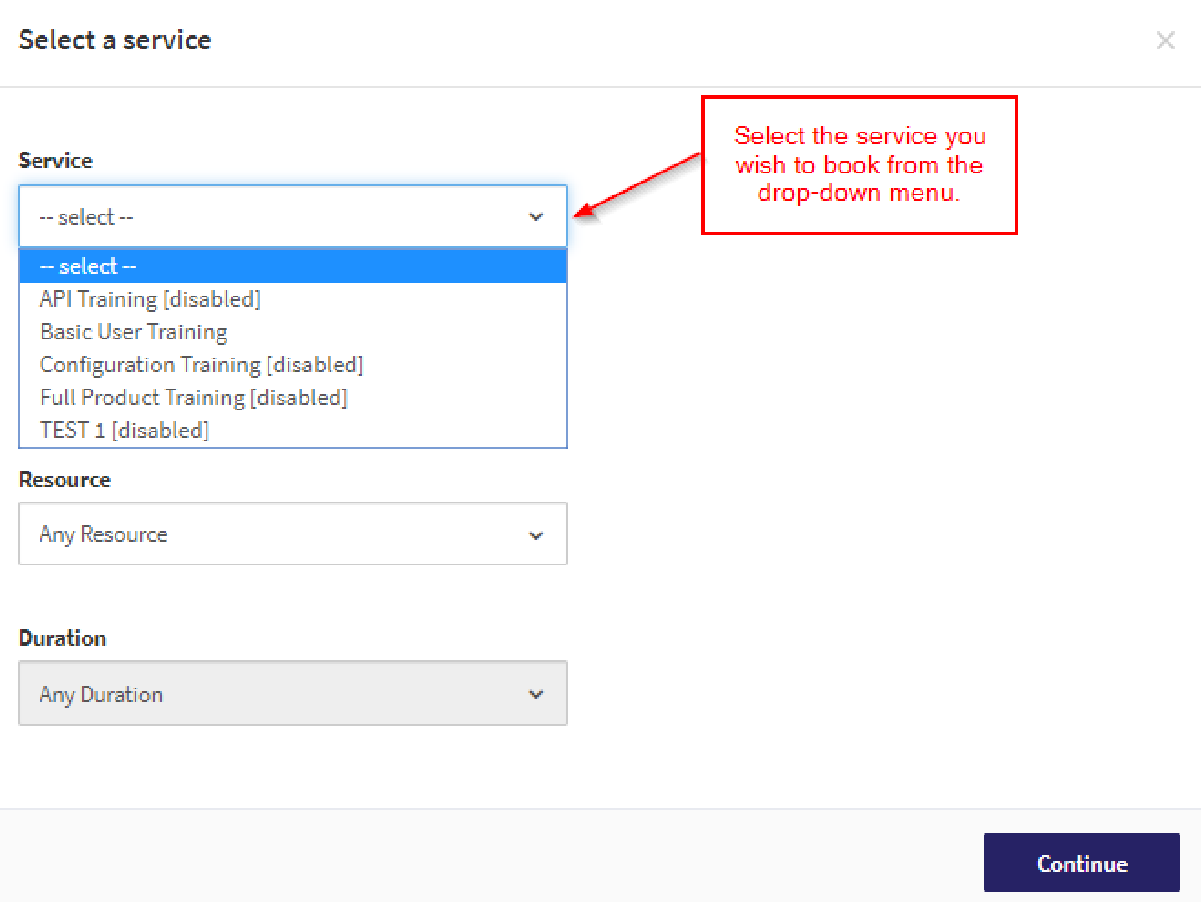
Step 1: (Method when allocating specific staff and or resources from the main calendar page)

- 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.



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

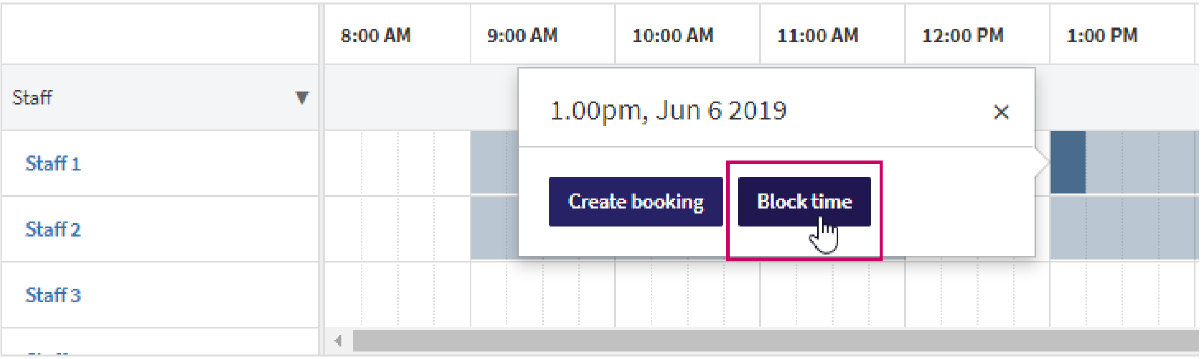
10 Blocking Out Time

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:

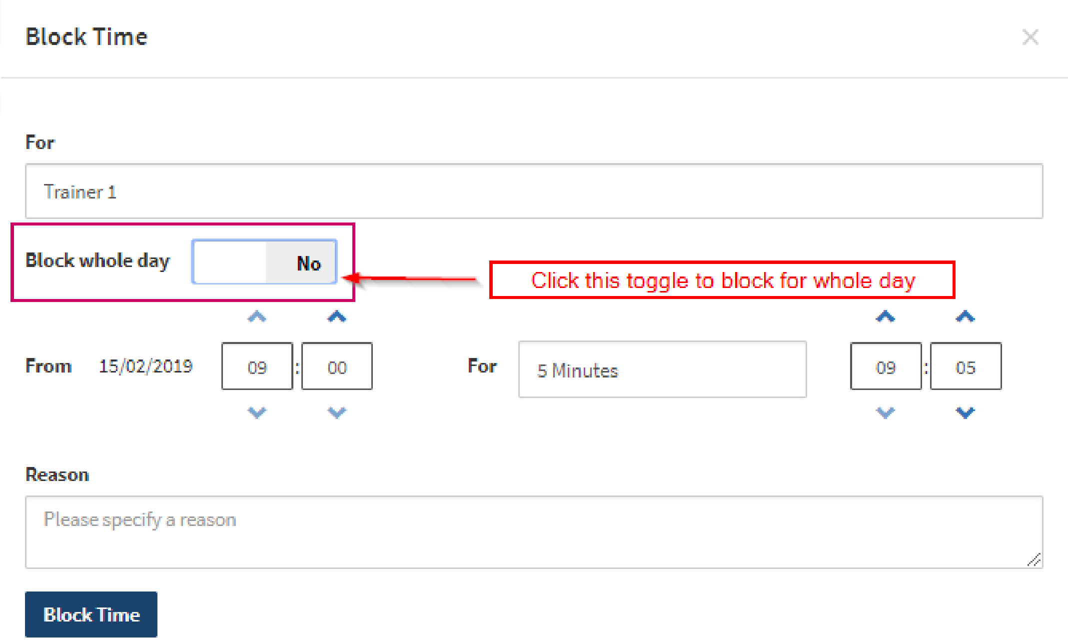
Step 1:

- 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:

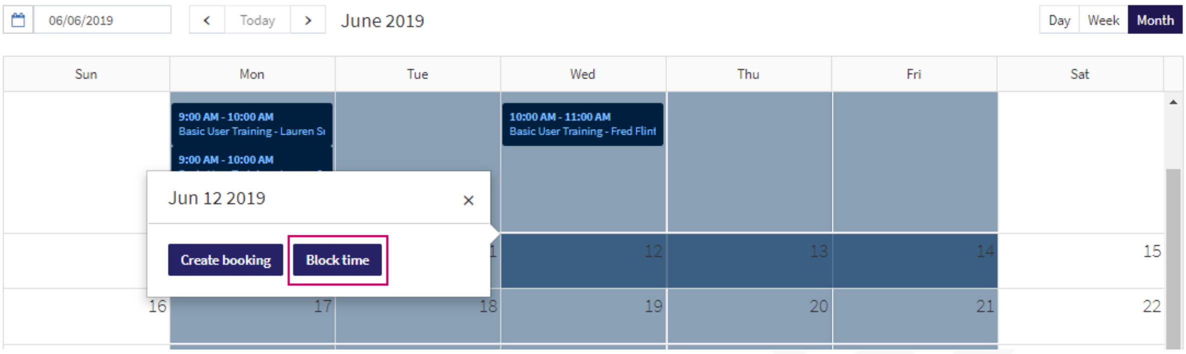
- A box will appear where you can select if you want to block for a whole day, or specify the amount of time you wish to block. You can also add a block reason to record why this time has been blocked.



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.

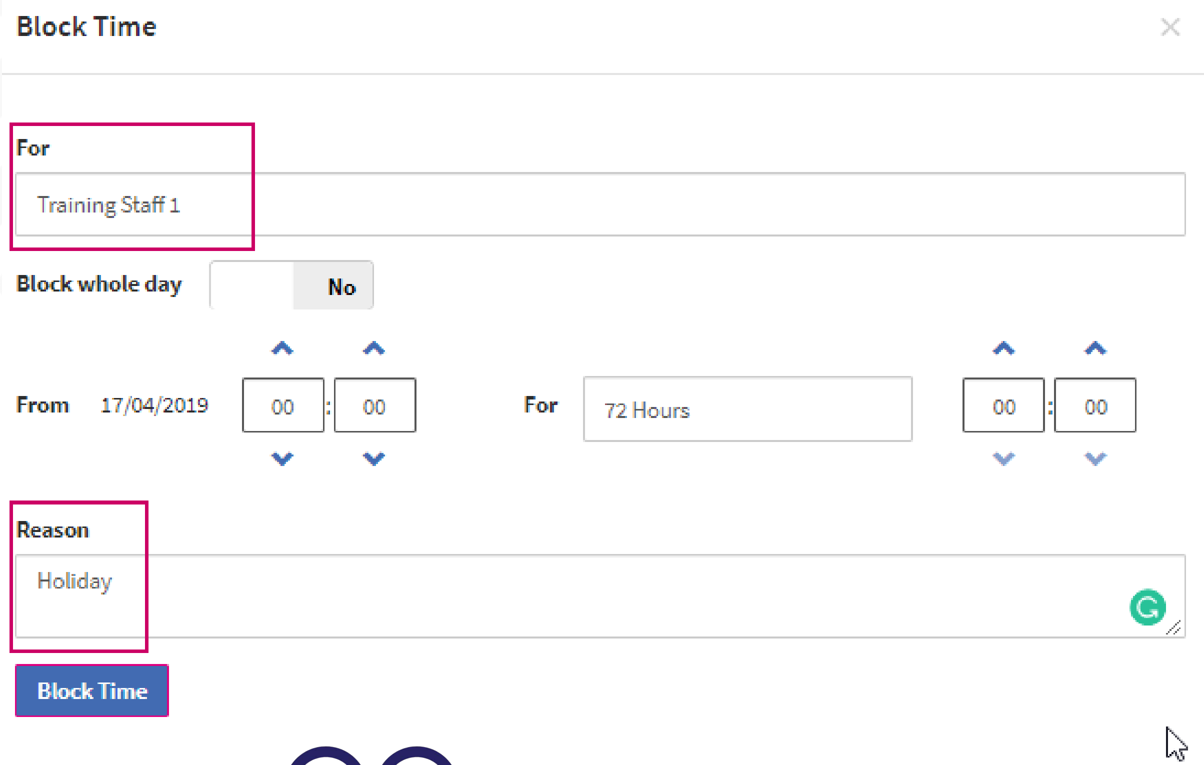
2. Use your mouse to select the days you wish to block out for holiday and click 'Block time'.



3. Select the staff you wish to block time off for.

4. Enter the reason for the time off.

5. Click 'Block time'

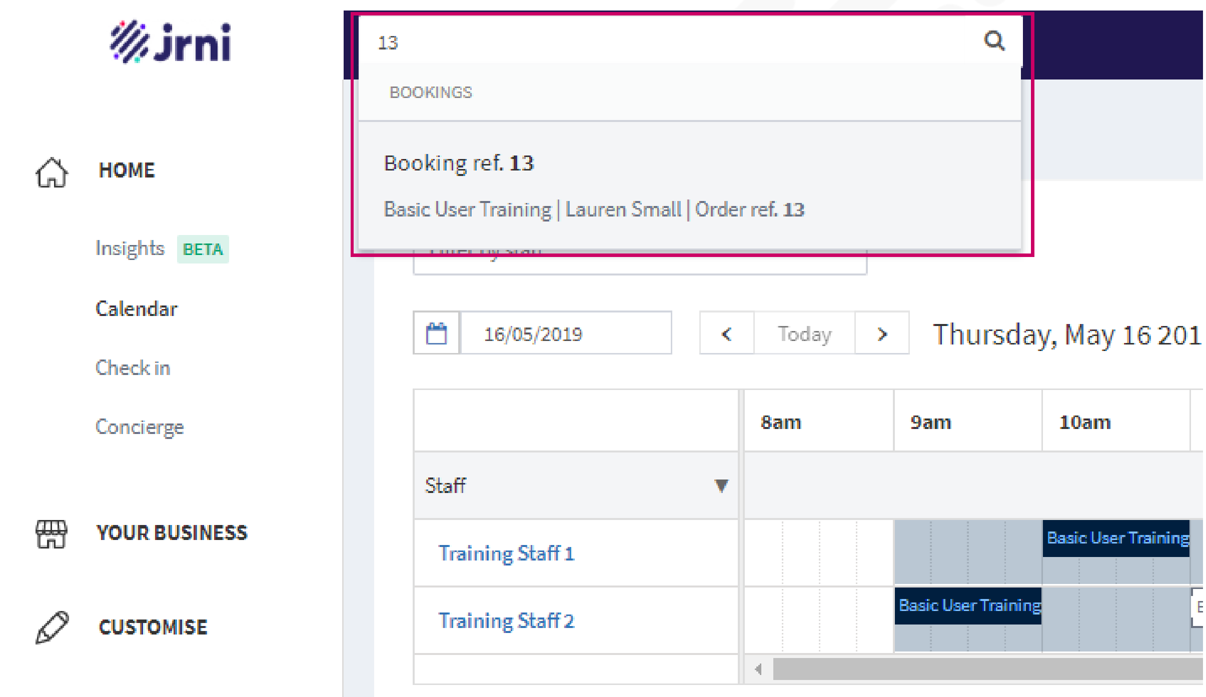


Click here to view a training video about this function

11 Locating Bookings and Customers

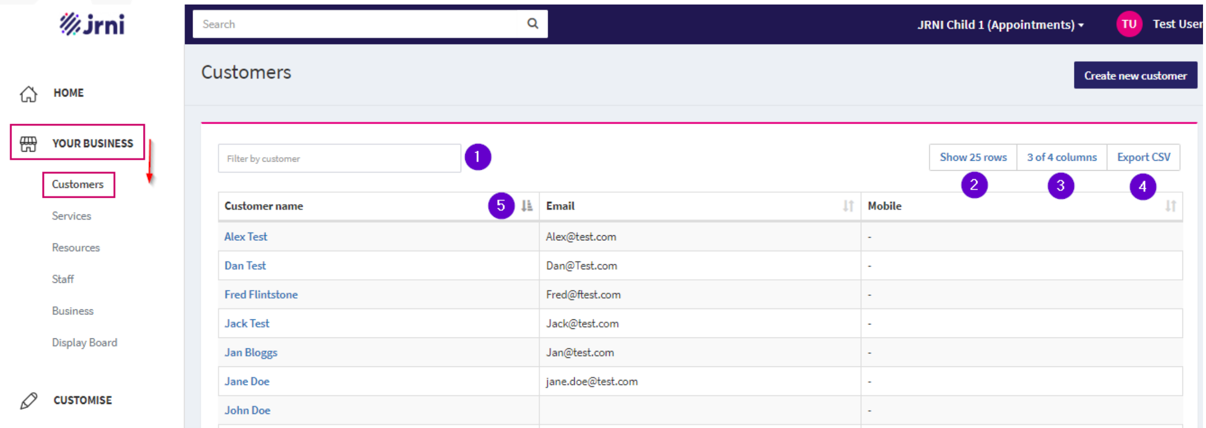
To locate a booking or a customer simply use the global search bar at the top of the page. You will be able to locate a booking or customer by searching for the following:

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



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').



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

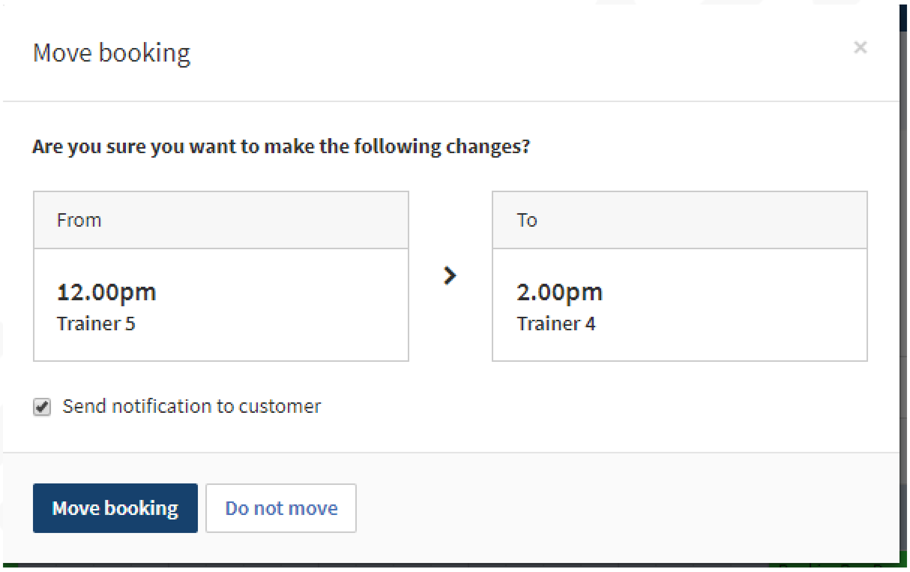
There are a few ways to reschedule a booking inside JRNI such as:

- 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.)

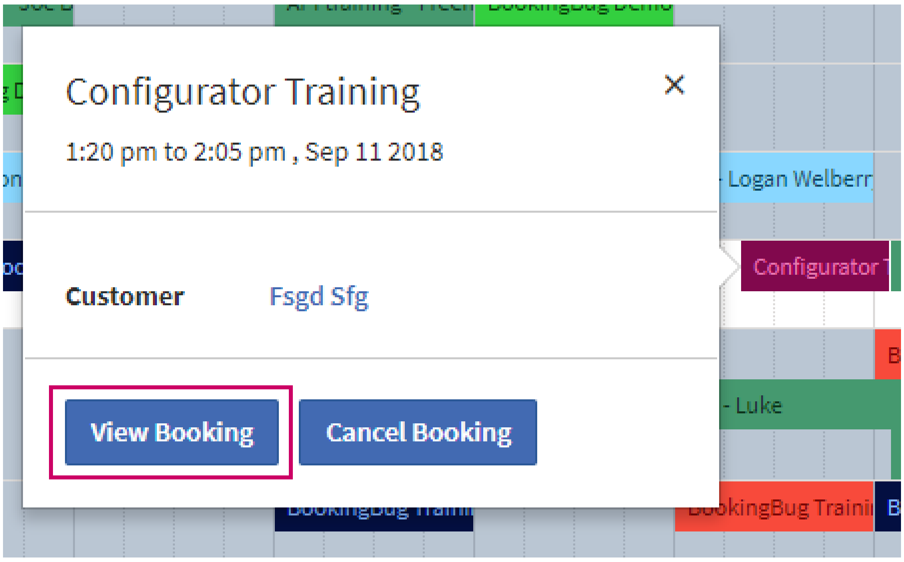
2. A pop-up box will appear asking if you are sure you wish to move the booking to the new chosen time, day, staff member, or resource. Ensure the details are correct and click 'Move booking'.



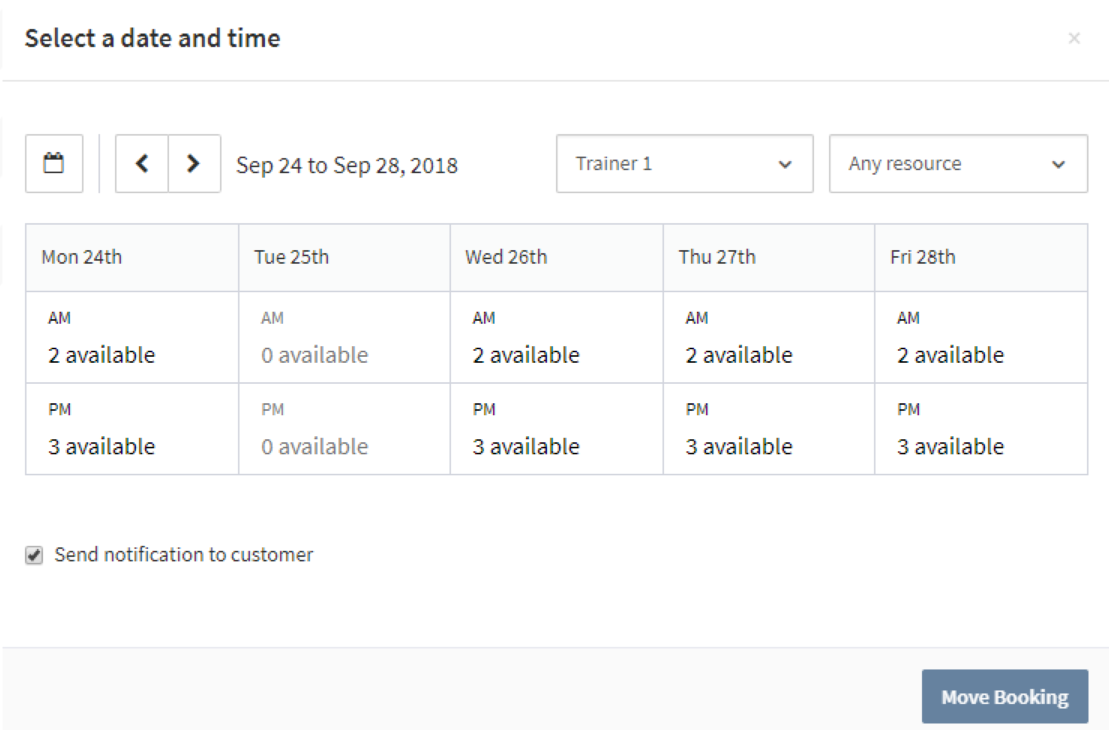
Reschedule booking from the calendar:

1. Click on the booking you wish to move from the calendar.

2. Click 'View Booking' on the pop up that appears.

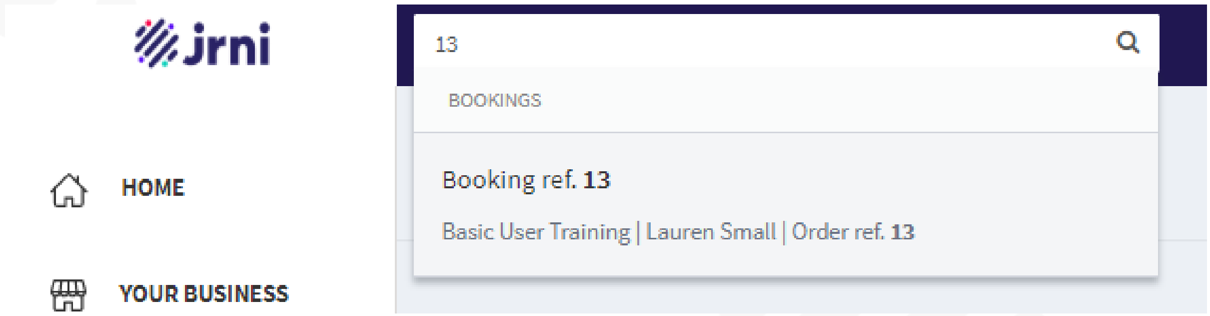


3. You will be presented with the booking profile. Click 'Reschedule' then choose the new time and date or staff/resource you wish to move the booking to.



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

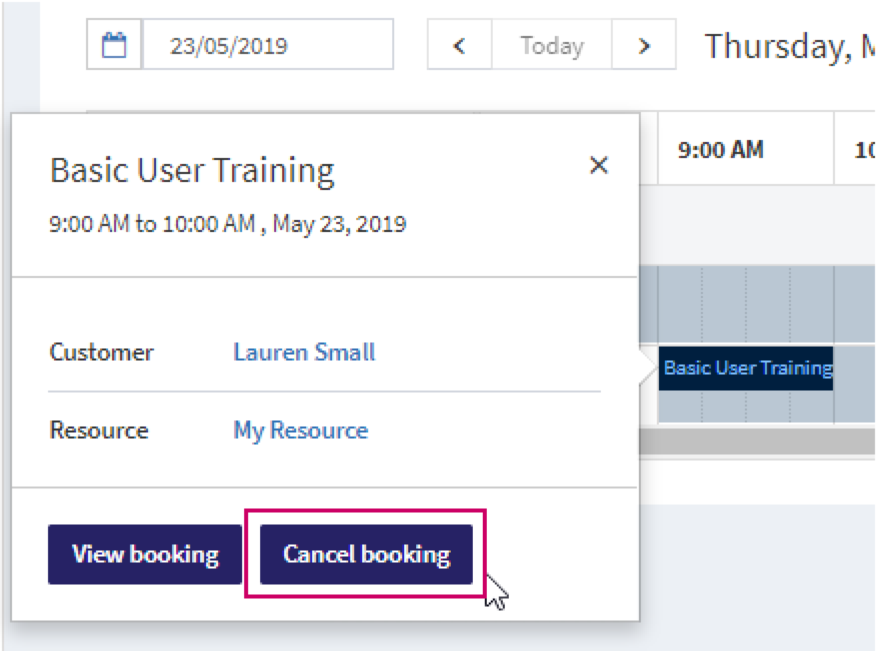
13 Cancelling Bookings

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'.

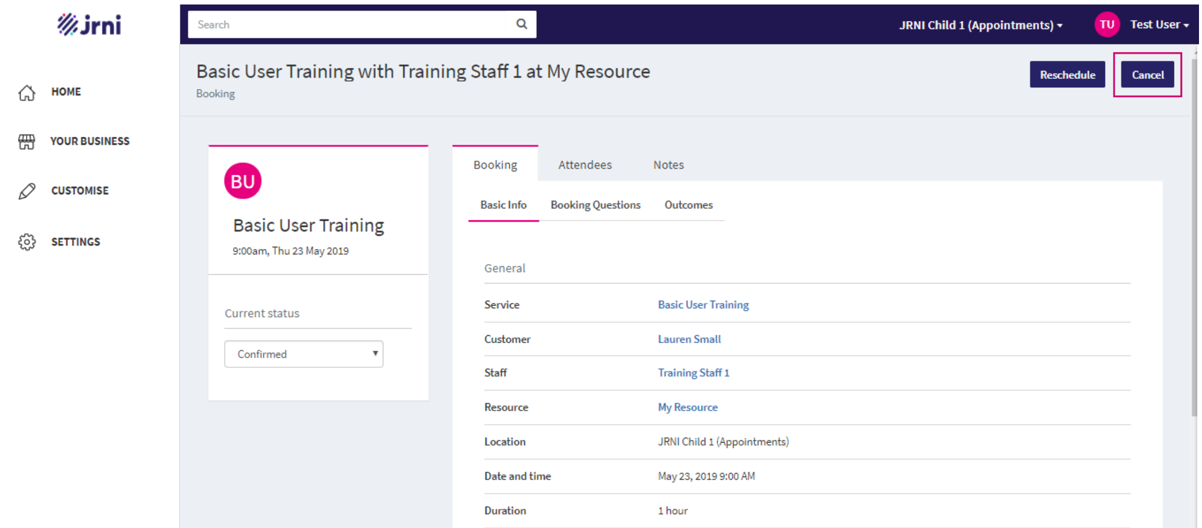


2. If you wish to send a notification to the customer, tick the send notification box and enter a cancellation reason if you want to record the reason.

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'.



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

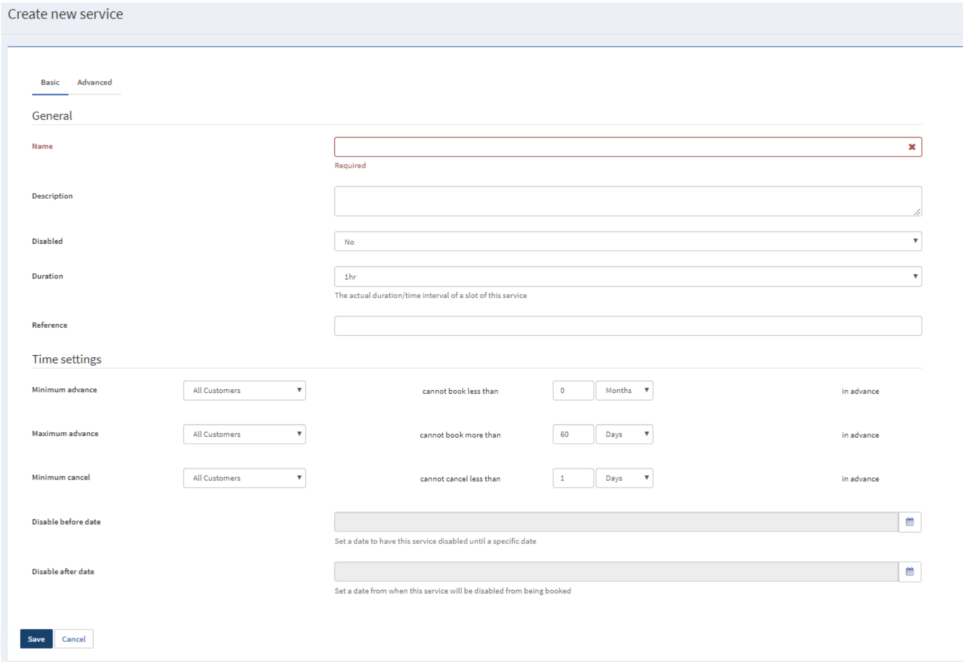
This section of the guide focuses on the configuration and will give you information on how to:

- 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

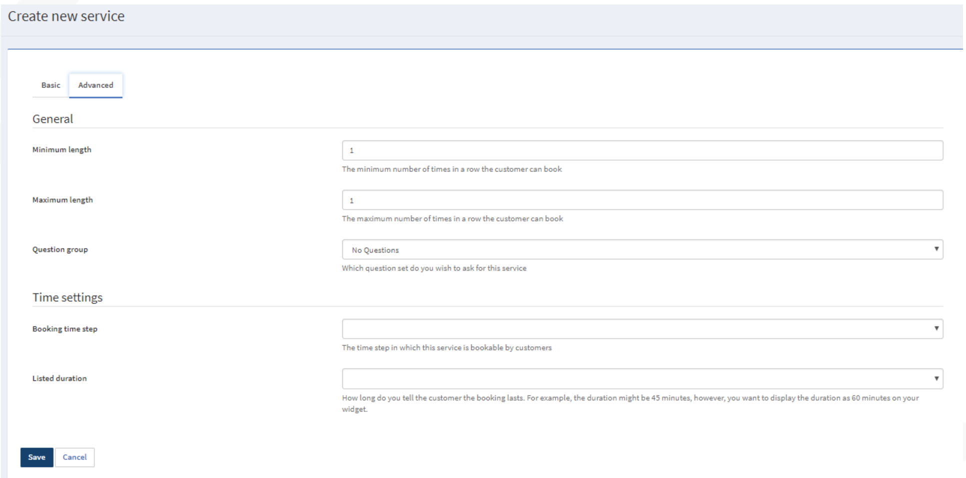
15 Creating and Editing Services

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.



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



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:

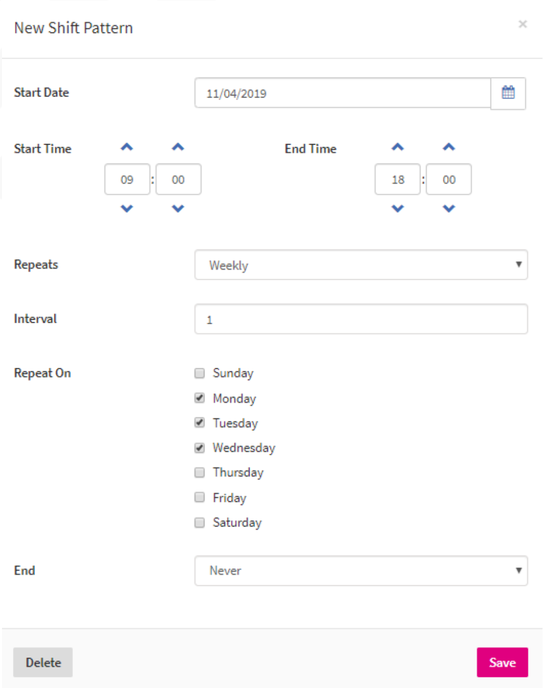
1. Click on the staff member you have created to view the profile and click on the 'schedule' tab.

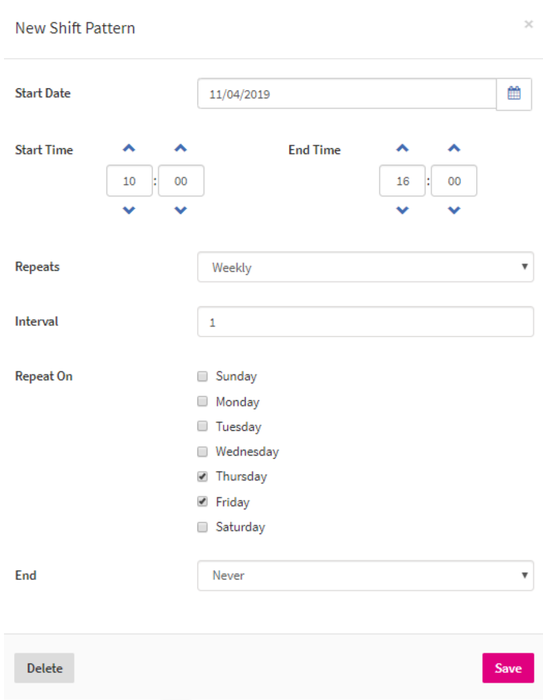
2. Click on 'create schedule'.

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.





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.

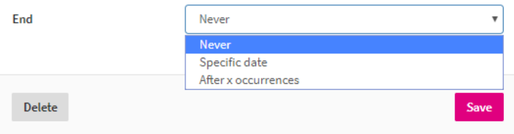
End time:
The time the staff member is available to. Please note, If this was set to 5pm, no bookings can be made after 5pm, bookings can only be made up to 5pm.

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.

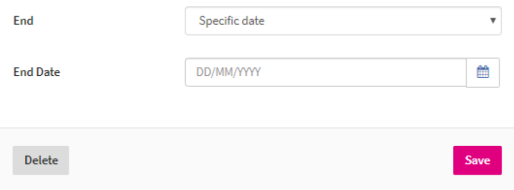
Repeat on:
Allows you to set up how many times the schedule repeats. For example if repeat was set to 3, the schedule would run 3 times.

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



This means the schedule will continue with no end date.



Choose a date you wish the schedule to end.

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.

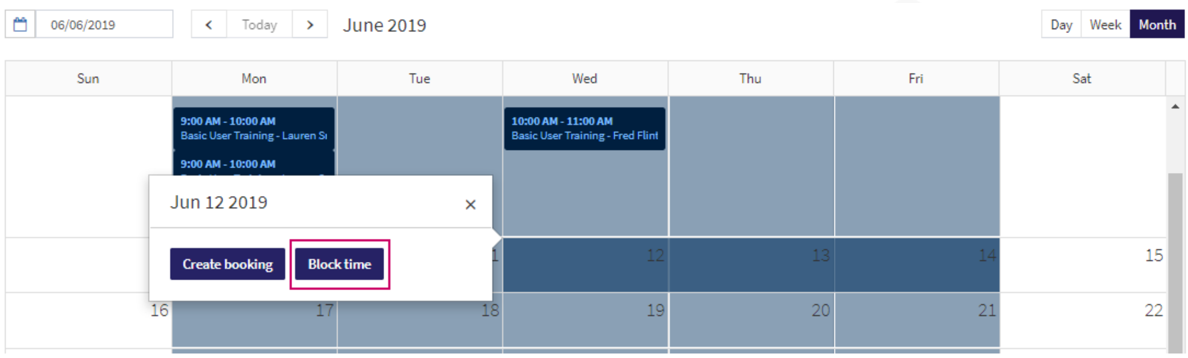
Click here to view a training video about this function

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.

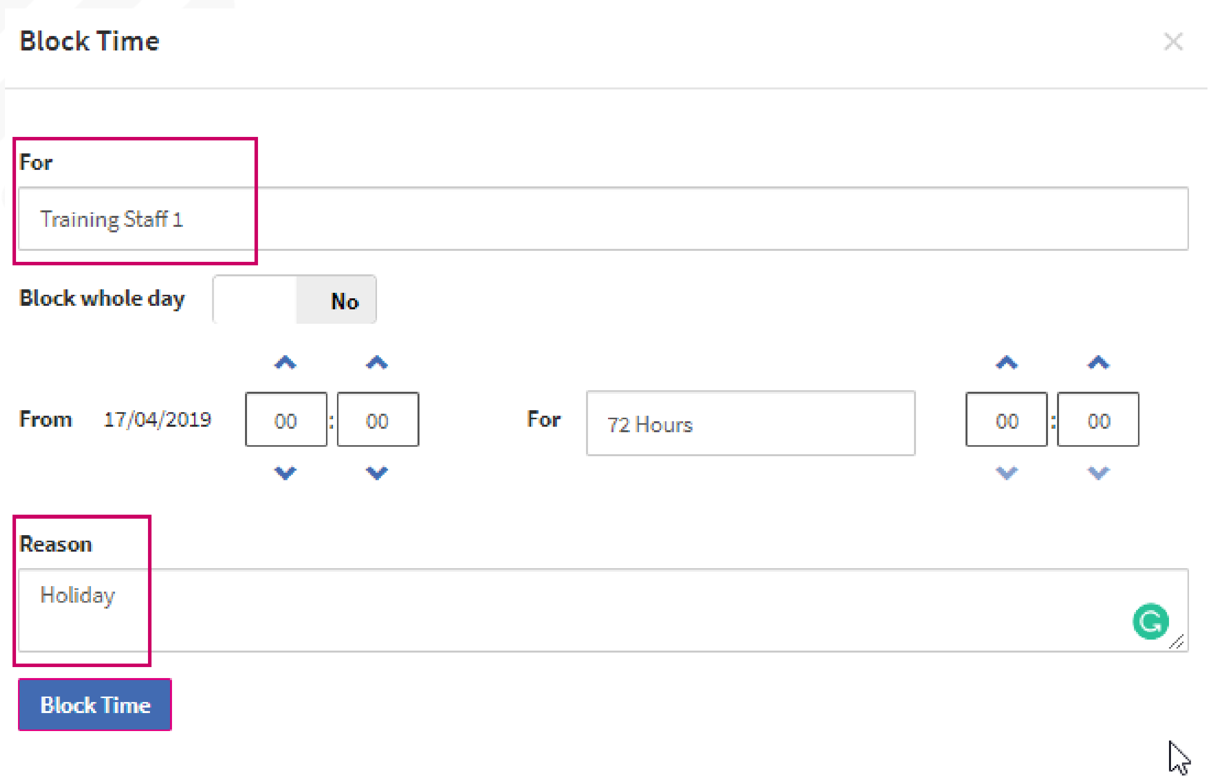
2. Use your mouse to select the days you wish to block out for holiday and click 'Block time'.



3. Select the staff you wish to block time off for.

4. Enter the reason for the time off.

5. Click 'Block time'



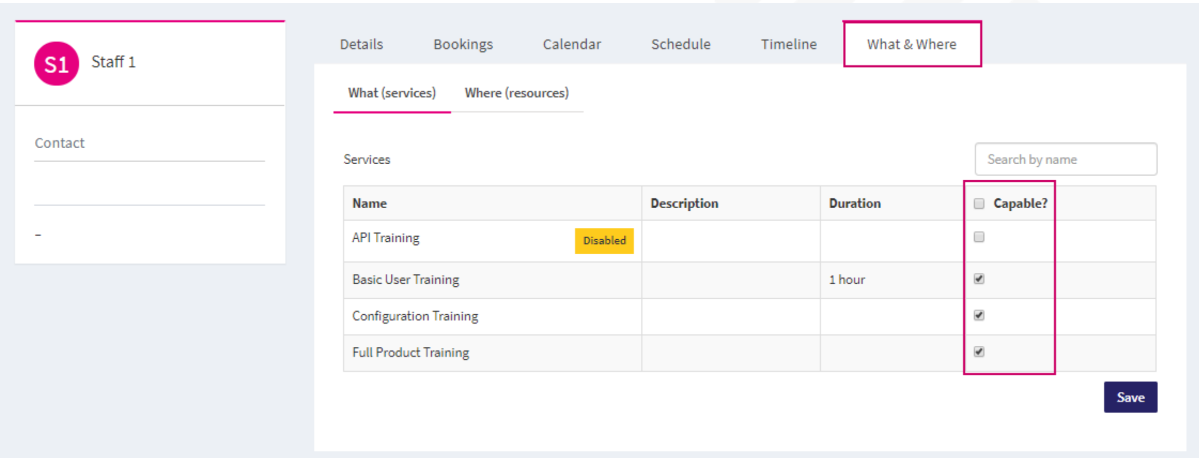
Setting up the What & Where:

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.



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:

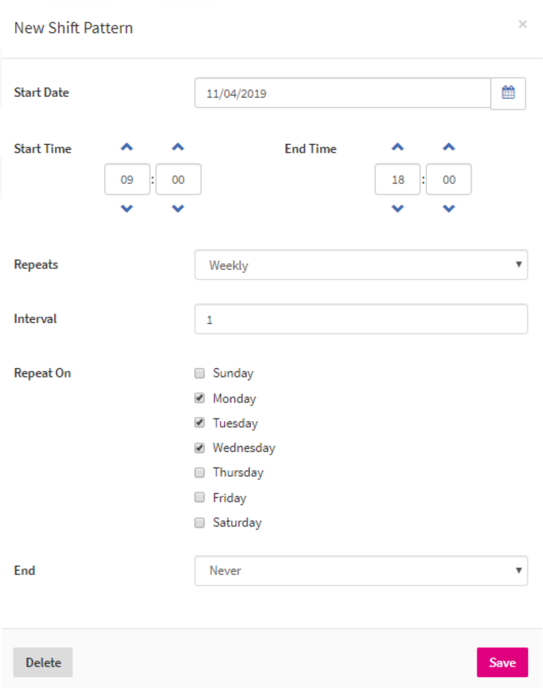
1. Click on the resource you have created to view the profile and click on the 'schedule' tab.

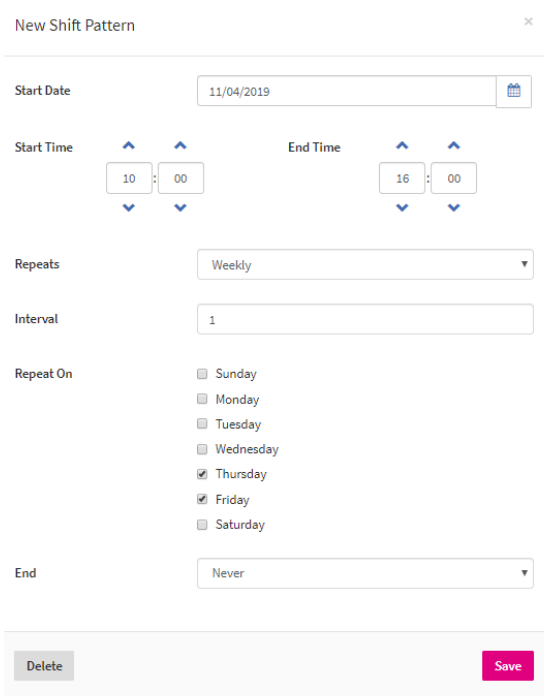
2. Click on 'create schedule'.

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.





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.

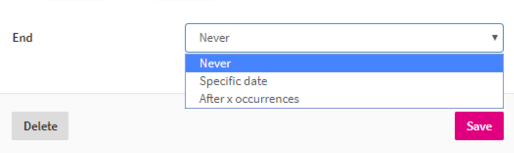
End time:
The time the resource is available to. Please note, If this was set to 5pm, no bookings can be made after 5pm, bookings can only be made up to 5pm.

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.

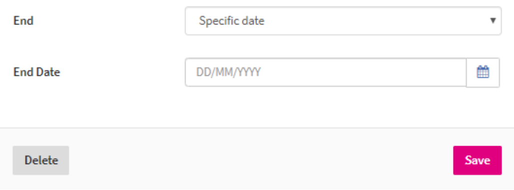
Repeat on:
Allows you to set up how many times the schedule repeats. For example if repeat was set to 3, the schedule would run 3 times.

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



This means the schedule will continue with no end date.



Choose a date you wish the schedule to end.

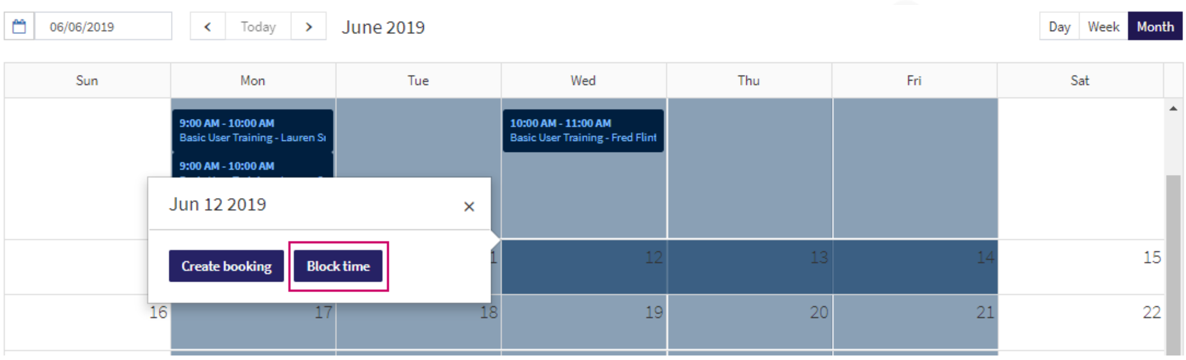
The schedule will run x amount of times. For example, this schedule will run 4 times. Using the example above, the interval is set up for once a week, so if 'after x occurrences' is set to 4, the schedules will run for 4 weeks.

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.

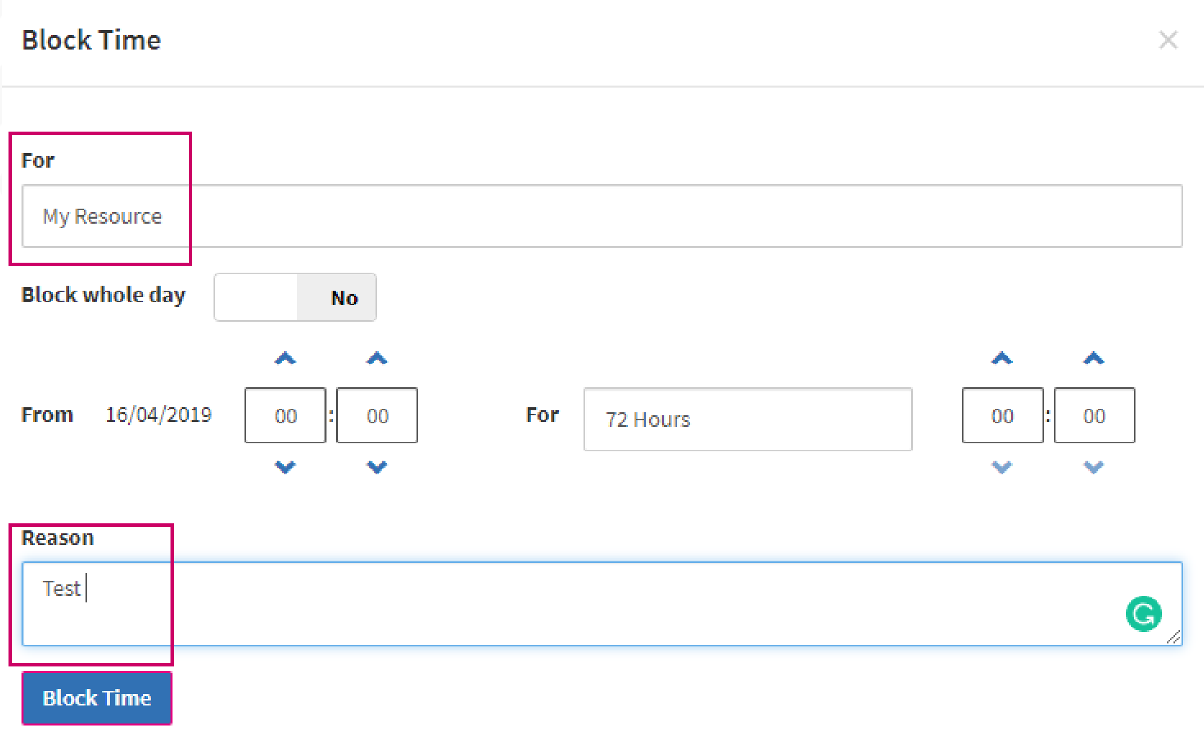
2. Use your mouse to select the days you wish to block and click 'Block time'.



3. Select the resource you wish to block time off for.

4. Enter the reason for the blocked time.

5. Click 'Block time'



Setting up the Who & What:

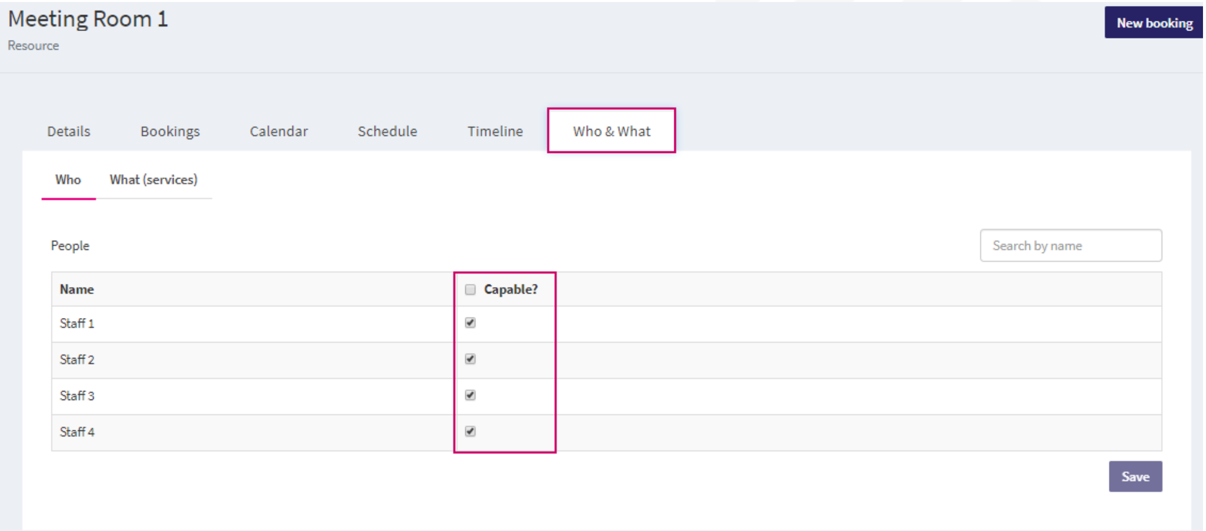
The Who & What allows you to configure which services the resource is able to take bookings for and which staff members can use the resource.

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.



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.

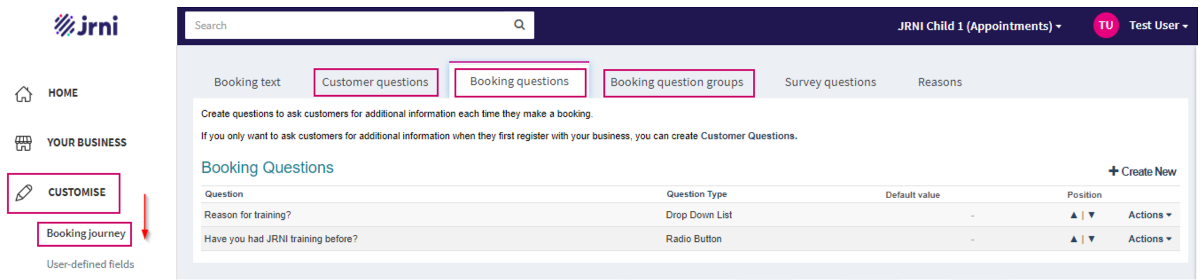
2. To edit the schedule, click on the current schedule to make changes and click save.

3. To edit the Who & What, click on the Who & What tab to make changes and click save.

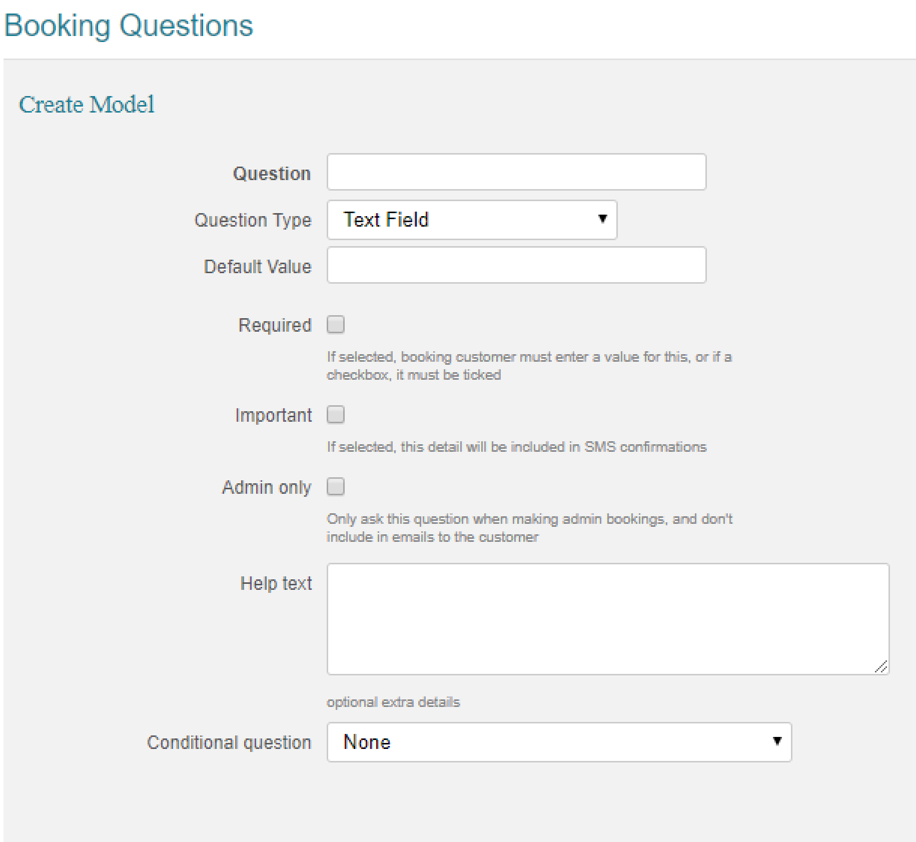
18 Booking & Customer Questions

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

How to create booking and customer questions:



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:



- 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.

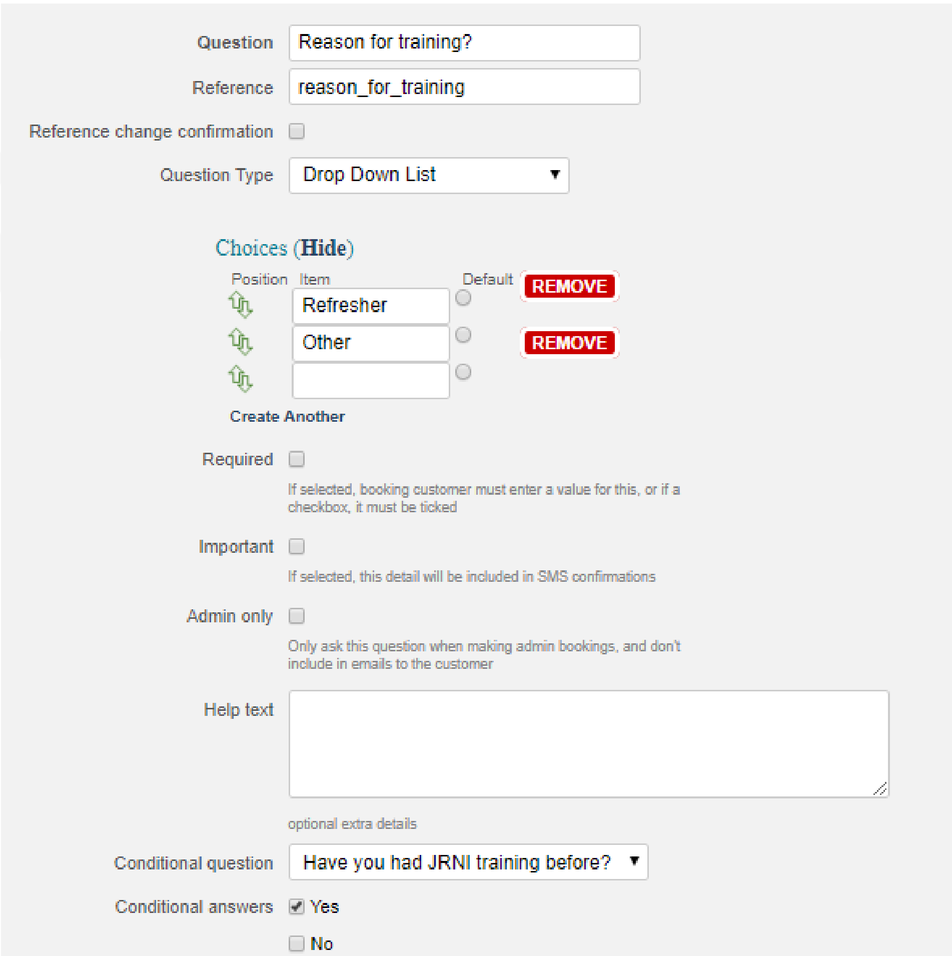
Conditional Questions:

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.

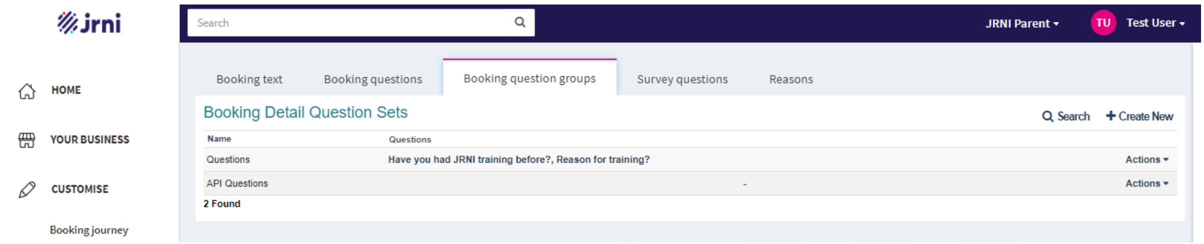
see example below:



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:



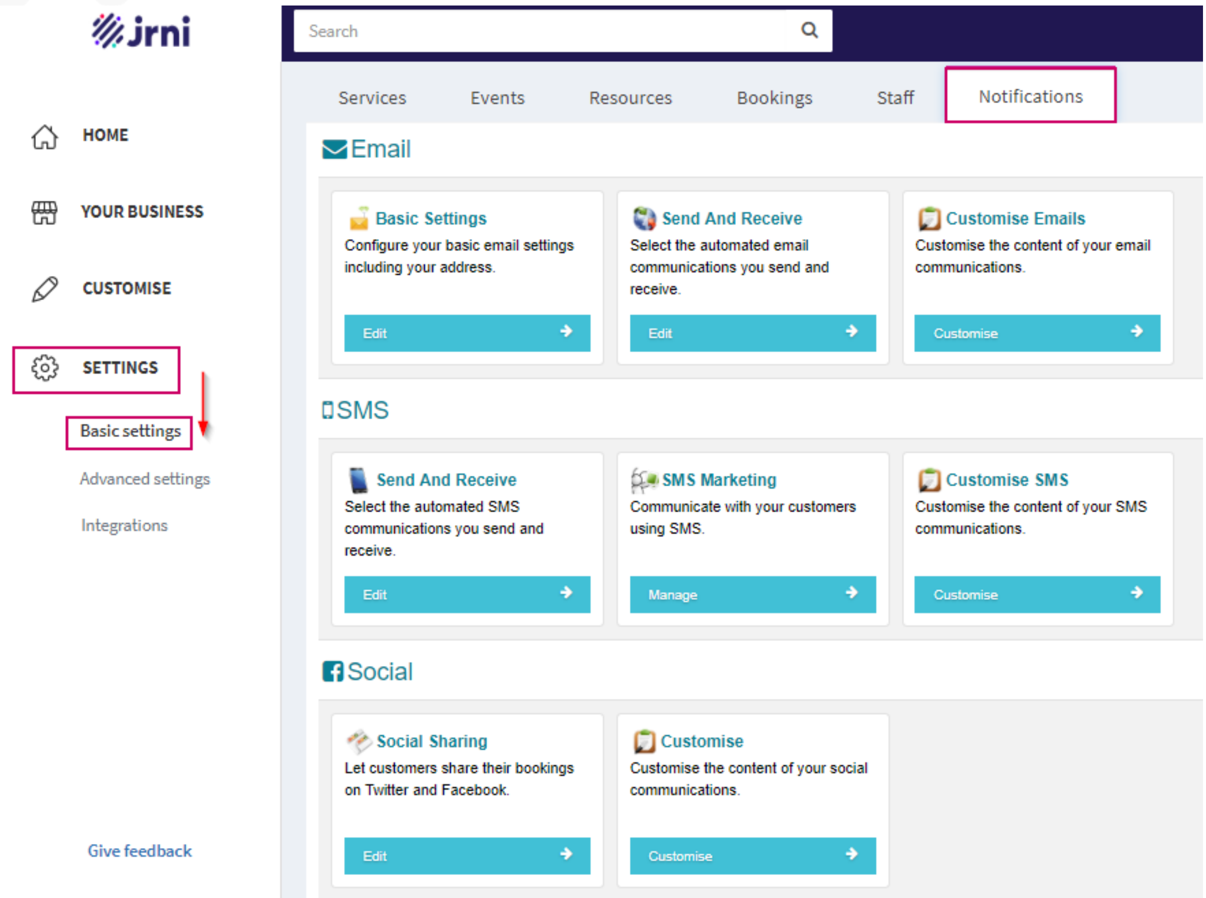
1. From the sidebar, click on 'CUSTOMISE' then 'Booking Journey'.
2. Click on the 'Booking Questions Group' tab.
3. Click 'create new' on the right-hand side and enter the name of the question group and add the questions you wish to ask to the group.

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.



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.)