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Installation and setup

1. Download a .zip archive with the MotoPress Appointment Booking Plugin files.
2. Install the plugin from your WordPress Dashboard via Plugins → Add New → Upload Plugin → Browse → Install Now.
3. Activate the plugin.
4. You’ll notice the new *Appointments* menu on your WordPress dashboard.

Quick start guide

This quick guide will help you get started easily:

1. Start by going to the *Settings menu* to configure basic plugin parameters, such as *currency*, *a default time slot for bookings*, etc.
2. Add Employees via the *Employees menu*.
3. Add a database of locations via the *Locations menu* (e.g. cities, areas, shops, rooms, etc.).
4. Create schedules for individual employees via the *Schedules menu* (e.g. add working hours, lunchtimes, days off, etc.).
5. Add and customize the list of services you offer (e.g. classes, doctor appointments, fitness training, etc.) via the *Services menu*.
6. Categorize services by *Tags* and *Categories* via the respective menus.
7. Set up *email notifications*.
8. Add a *shortcode* to display a booking wizard on your site.
9. Get and edit *bookings* on the admin dashboard.
General settings

Go to the settings menu to configure the following parameters:

- **Default time step**

  A default time step is the bread and butter of the MotoPress WordPress Appointment Booking plugin. Your choice of the default time step directly depends on the duration of your appointments. For example, if you want to create an appointment that lasts 1 h and 10 m, you need to set the default time step to 10 minutes to be able to set this duration.

  If there are no appointments or breaks/lunchtimes that last, for example, less than 30 minutes, it makes sense to set a default time step to 30 minutes. However, if you have appointments that last 1 h 40 m, again, a default time step of 10 m is required.
Depending on a time step, you’ll see different time slots when setting appointment durations:

- **Default appointment status**
  This status applies to all newly created booking requests (you can later change the status manually for any chosen booking). If you need to confirm each booking submission manually as an administrator, set *Pending*; if bookings are approved automatically upon submission, set *Confirmed*.

- **Currency**
  Set the default currency and its settings - it’ll be displayed on the individual service pages and at checkout.
Add employees

You can add unlimited staff members via the Employees menu → Add new.

Once you assign any services to your employees, the list of them will be visible in the general list of employees:
In the employee profile, you can add a staff member’s image and their bio/skills. Here is a default presentation:

The way it’s displayed on the frontend depends on the style of your WordPress theme.
**Note:** You *may or may not* showcase your whole team/individual staff members on the dedicated site pages.

Since version 1.2.0, you can add more categorized employee information using dedicated contact blocks:

This information can be displayed if you build individual employee profiles or teams.
If you want to make an employee page more informative and engaging with custom styling, you can also use third-party builders like Elementor or the default block editor.

For example, the following instructor page is built with the help of our Stratum widget for Elementor:
However, using third-party builders, you create these pages from scratch, they have no connection to the plugin’s content.

Add locations

Add locations applicable to your business realities via Locations → Add new. You can add unlimited locations.
Those can be cities, city areas, rooms, buildings, etc. You can assign a category to each location. Clients will be able to choose a location when placing a booking. You’ll further need to assign employees to different locations.

Create employee schedules

Add schedules for each employee via Schedules → Add new. You can add unlimited employees.

Here you’ll configure when, at what time, and where individual workers perform their duties.

1. First of all, choose an employee you are creating a schedule for.
2. Choose their main location (can be flexible for different working hours and days).
3. Create a detailed timetable.
Employee timetable

In the timetable, for each day of the week you can choose:

- A shift duration (working hours)
- Lunchtime and break duration
- Optionally set a different location depending on the day of the week.
The scheduling flexibility of the plugin also allows you to add:

- *days-off* by choosing specific dates:
- extra custom working times by choosing dates and specific working hours:
All these settings apply to the individual employees so you can create different schedules. You can also make changes to schedules anytime.

Add services

Add services you offer via Services → Add new. You can add unlimited services.
The services are actual bookable slots - those can be anything from the beauty salon services to online classes.

You can add a service description and a featured image if you want to feature your services on dedicated pages. You can also add a service category to simplify and speed up the service search for your clients.

**Service settings**

For each service, you can apply the following settings:

- **Service price** (the currency sign will depend on the one you set via Settings at the beginning).
- Custom service *duration* – these are bookable slots (the time slot depends on the minimum time step you set in Settings at the beginning).
- *Optional buffer times* before and after the service – extra time added to the service duration - when you need to get prepared for the next booking or perform
some extra actions after the booking; it applies to a particular employee and service (it’s invisible to your clients).

- A *time before booking* globally for the service.
- Assign *eligible employees* who can perform this service.
Service Settings

Price
45

Duration
3h

Buffer Time Before
0m
Time needed to get prepared for the appointment, when another booking for the same service and employee cannot be made.

Buffer Time After
0m
Time after the appointment (rest, cleanup, etc), when another booking for the same service and employee cannot be made.

Time Before Booking
0m

Eligible Employees

Employees
- Giovanni Torez
- Gloria Foster
- Daniel Berardi

Customize Service For Employee

<table>
<thead>
<tr>
<th>Employee</th>
<th>Price</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Giovanni Torez</td>
<td>55</td>
<td>30m</td>
</tr>
</tbody>
</table>

Add Variation
Moreover, you can change the service duration and its pricing based on who provides it:

If you want to create a feature-rich service page, feel free to use any third-party builders or the default WordPress block editor. For example, we improved this default service page (online course) with the help of Elementor and its addon - Stratum widgets:
Similarly to how you worked with Employees showcase, you can create a list of services (course in our case) in any preferable way with the links to individual services:
Service categories & tags
In the Service categories and tags menu, you can add categories that will simplify and speed up the search of a service via the booking wizard on your site.

Enable automated email notifications
Enable immediate notifications and customize email templates via Settings → Emails.
First of all, apply some general settings and brand your email notifications - you'll see these settings right after the block of available email templates.
## General email settings

### Email Sender
- **Administrator Email**: info@getmotopress.com
- **From Email**: info@getmotopress.com
- **From Name**: Bookium

### Email Template
- **Logo URL**
  - URL to an image you want to show in the email header.
- **Footer Text**
  - (site_link) &mdash; Built with [Appointment]
  - Text applied to the footer of all emails.

### Template Parts
- **Name**
- **Admin Reservation Details**
  - Used for (reservation_details) tag in admin emails.
- **Customer Reservation Details**
  - Used for (reservation_details) tag in customer emails.

### Styles
- **Base Color**
- **Background Color**
- **Body Background Color**
- **Body Text Color**

![Save Changes Button]

- **Sender’s email address**
• Sender’s name (e.g. site title)

**Email template**

• You can add a logo to personalize your emails (make sure to test this to find the appropriate logo size).
• Add an email footer text.
• Customize template parts. Some email template macros (tags) are complex ones - they can contain several submacros. In the Template Parts menu, you can personalize those submacros. For example, the `{reservation_details}` tag can include some extra tags like `{service_name}`, `{reservation_date}` - or any other detail to your liking.
• Style settings include the base color, background color, body background color and body text color settings so you can better brand your emails.

Admin emails

These notifications are sent to the website administrator’s address (find it via *WordPress dashboard → Settings → General → Administrator email address*).

• *New Booking Email* - if the default booking status is confirmed, you'll receive emails on each new confirmed booking.

• *Pending Booking Email* is sent to your admin email address when you need to go through all received bookings manually (that is, change the booking status manually).
Email that will be sent to administrator after booking is placed. This email is sent when "Default Appointment Status" is set to "Confirmed".

**Enable/Disable**
- **Enable this email notification**

**Other Recipients**
You can use multiple comma-separated email addresses.

**Subject**
[sitename] - Appointment [booking_id] Confirmed

**Header**
New Appointment Confirmed

**Message Template**

```
Dear Administrator,

You have a new confirmed [service_name] appointment!

[booking.edit_link]

The appointment was scheduled for [employee_name] on [booking_date] from (start_time) till (end_time) at (location_name).

Client details:
[customer_name]
[customer_email]
[customer_phone]
```

**General tags:**
- The plugin name - (appointment)
- Site title (set in Settings > General) - (sitename)
- Site address (URL) - (site_link)

**Booking tags:**
- Booking ID - [booking_id]
- Booking edit link - [booking.edit_link]
- Booking total price - [booking_total_price]
- Booking date - [booking_date]
- Booking time (period) - [booking_time]
- Booking time (with buffer time) - [booking_buffer_time]
- Start time - [start_time]
- End time - [end_time]
- Start time (with buffer time) - [start_buffer_time]
- End time (with buffer time) - [end_buffer_time]
- Customer name - [customer_name]
- Customer email - [customer_email]
- Customer phone - [customer_phone]

**Reservation tags:**
- Reservation details - [reservation_details]
- Reservation ID - [reservation_id]
- Reservation price - [reservation_price]
- Reservation date - [reservation_date]
- Reservation time (period) - [reservation_time]
- Reservation time (with buffer time) - [reservation_buffer_time]

**Employee tags:**
- Employee ID - [employee_id]
- Employee name - [employee_name]
- Employee bio - [employee_bio]
- Employee edit link - [employee.edit_link]
You can customize the content of these emails, subject and header, change macros, and optionally add multiple extra recipients who'll get the same emails (for example, your employees).

Customer emails
These emails are sent to the email address customers provide when placing a booking.

- **New Booking Email** is sent to customers when booking requests are confirmed automatically upon submission.
- **Pending Booking Email** notifies customers that their booking request is waiting for manual approval by the admin staff.
- **Approved Booking Email** is sent to customers when their booking is confirmed by admins manually.
- **Canceled Booking Email** notifies customers that their booking is canceled.
Here is an example of a confirmation email a client gets when their booking is confirmed by admins:
Add a booking wizard to your site

To add a booking wizard to your site, go to Shortcodes → Add New → Appointment form.
This visual shortcode generator allows you to customize the look of your appointment booking form:

- Tick form fields that must be displayed:

This is useful when you don’t want customers to choose fields, for example, you can hide an employee field:
As you see, all for fields except for the service are optional.

- Rename default field labels
- Set default values
- Optionally add CSS or custom HTML
Once all the needed changes are applied, save them and the shortcode will be **automatically generated**.

Now you can paste this shortcode to any page using the default Shortcode block for the block editor or any other shortcode-specific widget by third-party builders like Elementor.
Note: changes you set in the shortcode generally apply globally to all forms; if you use the booking form on different pages and want to make different changes to individual forms, you need to customize chosen shortcodes only using the needed shortcode parameters from the Help menu:
The shortcode will run the one-page booking wizard for your clients, where they'll be offered to complete several steps to submit a booking.

Let's take a class booking example from our Edme appointment booking WP theme to see the process your clients will need to go through.

**Step 1.** Choose a service category, service, location, and an employee (or optionally go with 'any').
Step 2. Select the date and time and choose a free slot from available ones.

Step 3. Clients provide personal details (an email address, name, and phone number).
Let's also see what you can do with the rest of the shortcodes.

**Display an employees list**

By default, your staff members will be displayed in a grid format, so just tick which information to show.

Use the *Employees list* shortcode generator:

- Select IDs of employees (regular WordPress post IDs)
- Optionally select only specific locations
- Decide how many posts per page to show
- Choose the number of columns for a grid
- Configure ordering settings.
### Employees list

#### Employees List

**Show Items**
- Featured image
- Post title
- Excerpt
- Contact Information
- Social Networks
- Additional Information

Show or hide extra blocks.

**Employees**

571,572,573

Comma-separated slugs or IDs of employees that will be shown.

**Locations**

Comma-separated slugs or IDs of locations.

**Posts Per Page**

**Columns Count**

The number of columns in the grid.

#### Posts Order

**Order By**

Page order and post title

Sort retrieved posts.

**Order**

- **ASC** — from lowest to highest values (1, 2, 3)
- **DESC** — from highest to lowest values (3, 2, 1)

Designates the ASC - ascending or DESC - descending order of sorting.

---

Paste the shortcode to see the result:
Create a single employee page

If you want to display more information about an employee, e.g. their schedule, services they provide, etc., there are dedicated shortcodes you can find in Appointments → Help.

You can use:

- Employee photo and title
- Services assigned
- Schedule
- Content
- Contact information
- Social networks
- Additional information
Paste the needed shortcodes with the needed ID one by one to display the needed information:
Add title

[...]

[Shortcode]

This is a very default view:
Dr. Jesse Johnson

- Umbilical Cord Appearance — €25
- Cardiac Electrophysiology — €90
- Repositioning Techniques — €88
- Geriatric Neurology — €44
- Nuclear Cardiology — €70
- Neurocritical Care — €70
- Echocardiography — €50
- Colonoscopy — €40
- Gastroscopy — €70
- Bronchoscopy — €80
- Cardiac Ablation — €120
- Holter monitoring — €25

- Mon-Fri 8:00 am - 5:00 pm

The Department of Pediatrics strives to improve the well-being of all children. We will be recognized by UNMC, the region, and the nation as a center of excellence and innovation in health care, scholarship, education, service, and advocacy. Our faculty members will continuously improve their abilities through the support and opportunities provided by the Department and UNMC.

- Clinic 3, 1245 Hillview Drive, KS
Create a list of services

Use the Services list shortcode to feature all or selected services, with their prices and descriptions.

![Services List](image)

Show Items
- Featured image
- Post title
- Excerpt
- Price
- Duration
- Employees

Show or hide extra blocks.

Services
Comma-separated slugs or IDs of services that will be shown.

Employees
Comma-separated slugs or IDs of employees that perform these services.

Categories
Comma-separated slugs or IDs of categories that will be shown.

Tags
Comma-separated slugs or IDs of tags that will be shown.

Posts Per Page

Columns Count
The number of columns in the grid.

You can also optionally output photos of employees – if there is just one person, it’ll be displayed with the person’s name; if there are many employees – only photos will be displayed.
Create a list of locations

Use the *Locations list shortcode* to create a list of locations where you operate (shops, rooms, departments). You can:

- Show or hide a featured image, post title and an excerpt
- Choose which locations and location categories to show
- Posts per page and the number of columns
- Ordering settings
The default styling will be inherited from your WordPress theme:
You can do the same for categories using the Service Categories list shortcode.

Manage bookings

Go to the Booking menu to see all your bookings. Click “Edit” to edit individual bookings.

So far, there are two things you can update in a booking:

- Booking status (pending, cancelled, or confirmed)

- Booking details (total price and personal customer details)
### Booking Price

**Total Price**

12

### Reserved Services

<table>
<thead>
<tr>
<th>Service</th>
<th>Employee</th>
<th>Location</th>
<th>Price</th>
<th>Date</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beard trim</td>
<td>Giovanni Torez</td>
<td>Brooklyn</td>
<td>€12</td>
<td>November 23, 2020</td>
<td>1:00 pm - 1:30 pm</td>
</tr>
</tbody>
</table>

### Customer Info

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ann</td>
<td>Parker</td>
<td>12345678</td>
</tr>
</tbody>
</table>