

# WordPress Appointment Booking Plugin

## Documentation

*Updated on December 1, 2020*

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## Installation and Setup

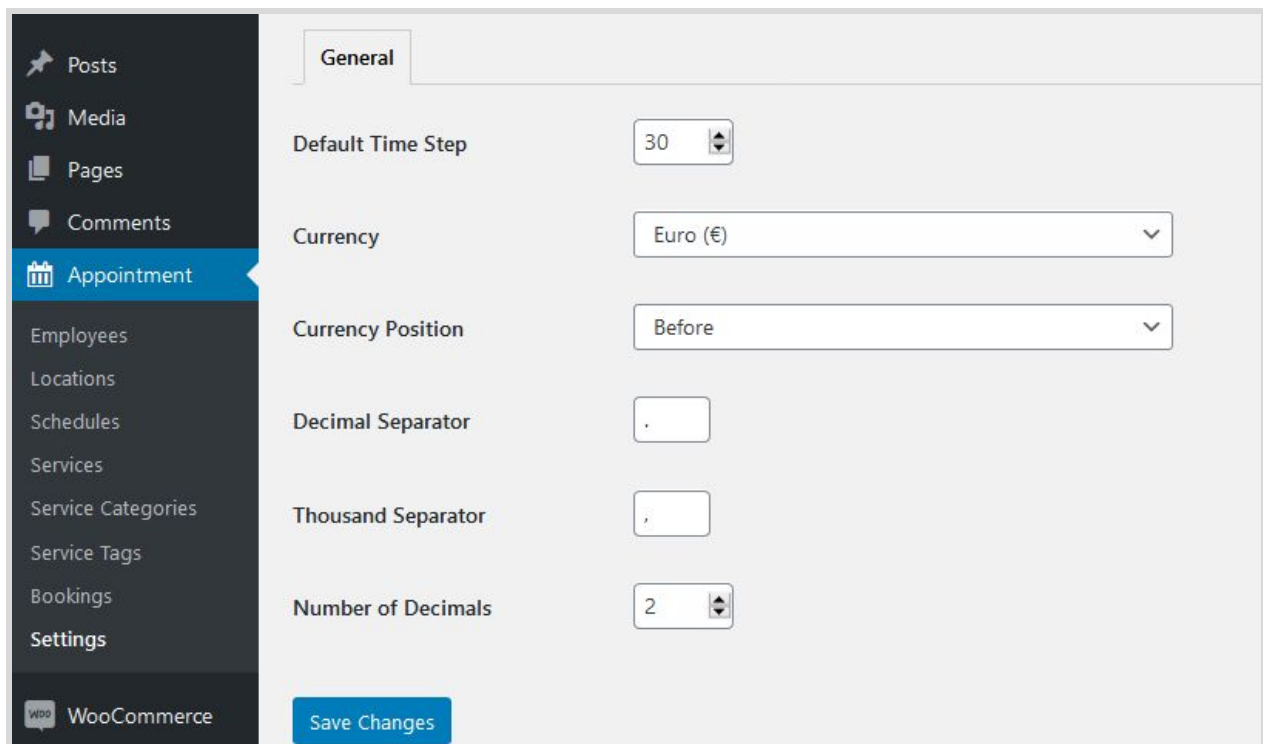
1. Download a .zip archive with the [MotoPress Appointment Booking Plugin](#) files.
2. Install the plugin from your WordPress Dashboard via Plugins → Add New → Upload Plugin → Browse → Install Now.
3. Activate the plugin.
4. You'll notice the new *Appointments* menu on your WordPress dashboard.

## 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. Add a *shortcode* to display a booking wizard on your site.
8. Get and edit *bookings* on the admin dashboard.

## General Settings



The screenshot shows the 'Appointment' plugin settings page. On the left is a dark sidebar menu with options: Posts, Media, Pages, Comments, Appointment (highlighted), Employees, Locations, Schedules, Services, Service Categories, Service Tags, Bookings, and Settings. At the bottom of the sidebar is the 'WooCommerce' logo. The main content area is titled 'General' and contains the following settings:

Default Time Step	<input type="text" value="30"/>
Currency	<input type="text" value="Euro (€)"/>
Currency Position	<input type="text" value="Before"/>
Decimal Separator	<input type="text" value="."/>
Thousand Separator	<input type="text" value="."/>
Number of Decimals	<input type="text" value="2"/>

At the bottom of the settings area is a blue 'Save Changes' button.

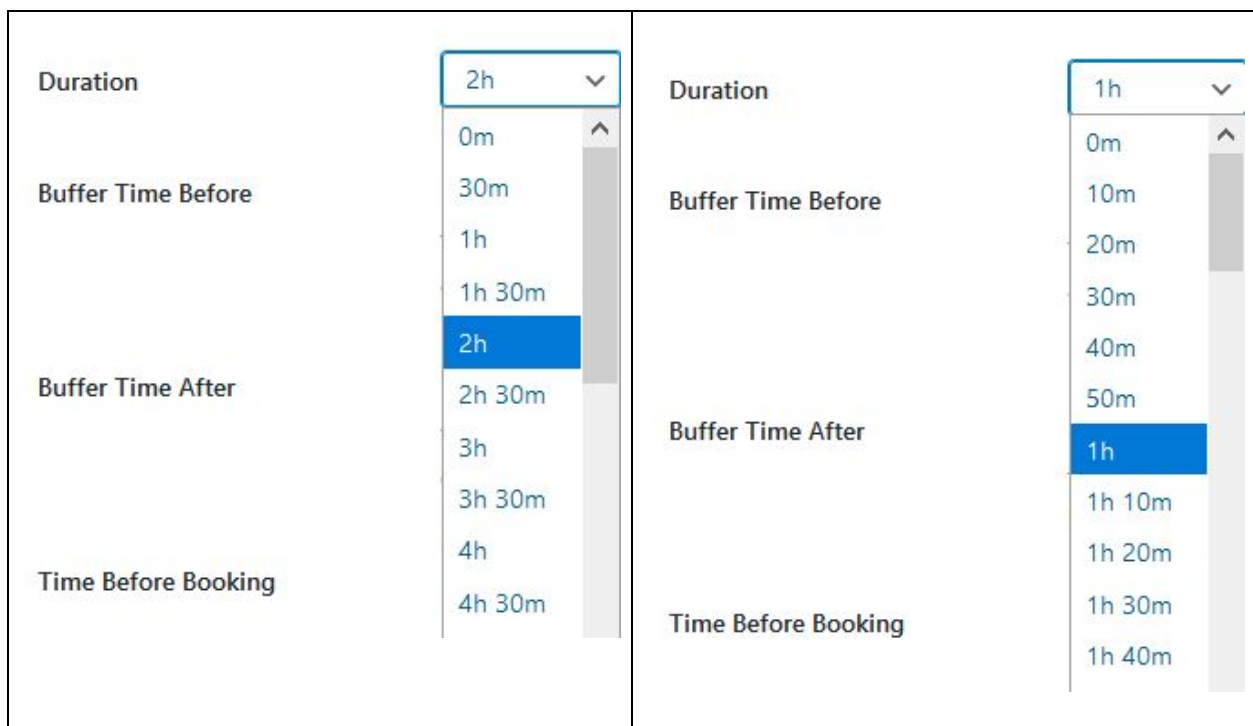
Go to the settings menu to configure the following parameters:

- **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:



- **Currency**

Set the default currency and its settings - it'll be displayed on the individual service pages and at checkout.

A course card for 'John Doue' with a price of \$100.00. The card displays the following details:

Duration	15 weeks
Lectures	4
Enrolled	756 students
Language	English
Deadline	English

The card also features a profile picture of John Doue, identified as a Teacher, and a prominent 'BUY COURSE' button.

## 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:

The screenshot shows the 'Employees' management page. On the left is a sidebar with navigation options: Posts, Media, Pages, Comments, Appointment, Employees (highlighted), Locations, Schedules, Services, Service Categories, Service Tags, Bookings, Settings, WooCommerce, Products, Analytics, and Accommodation. The main content area is titled 'Employees' and includes an 'Add New' button. Below the title, there are filters for 'All (3) | Published (3)', a search bar, and buttons for 'Bulk Actions', 'Apply', 'All dates', and 'Filter'. The table below lists three employees:

<input type="checkbox"/>	Title	Services	Date
<input type="checkbox"/>	Daniel Berardi	Haircut Botanical Hair Therapy Treatment Bridal Styling	Published 10 mins ago
<input type="checkbox"/>	Gloria Foster	Single Process Retouch Blowdry Styling Haircut Botanical Hair Therapy Treatment Bridal Styling	Published 2020/11/18
<input type="checkbox"/>	Giovanni Torez	Beard trim Single Process Retouch Haircut Botanical Hair Therapy Treatment Men's Grey Blending	Published 2020/11/17
<input type="checkbox"/>	Title	Services	Date

At the bottom of the table, there are 'Bulk Actions' and 'Apply' buttons, and a note that there are '3 items'.

In the employee profile, you can add a staff member's image and their bio/skills. Here is a default presentation:

The screenshot shows the 'Edit Employee' profile for Gloria Foster. The name 'Gloria Foster' is in a text field at the top. Below it is the permalink: <https://uglywebsites.org/bookium/employee/gloria-foster/> with an 'Edit' button. There is an 'Add Media' button and a rich text editor with a toolbar. The bio text reads: 'Owner / Stylist / Make-up Artist' followed by a paragraph: 'A graduate of the Soho Institute, Gloria has spent over a decade mastering her craft through continued education. She loves personalizing classic shapes with a modern twist that grow in with ease, and for creating color that's soft and sustainable that fits your personality and lifestyle!'. Below the bio is a bulleted list of skills: styling, color, cut, and texture treatment. On the right side, there is a 'Publish' dropdown menu and a 'Featured image' section. The featured image is a portrait of Gloria Foster. Below the image is the text 'Click the image to edit or update' and a 'Remove featured image' link. At the bottom, there is a 'Word count: 55' and 'Last edited by anntaylor on November 23, 2020 at 1:10 pm'.

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.

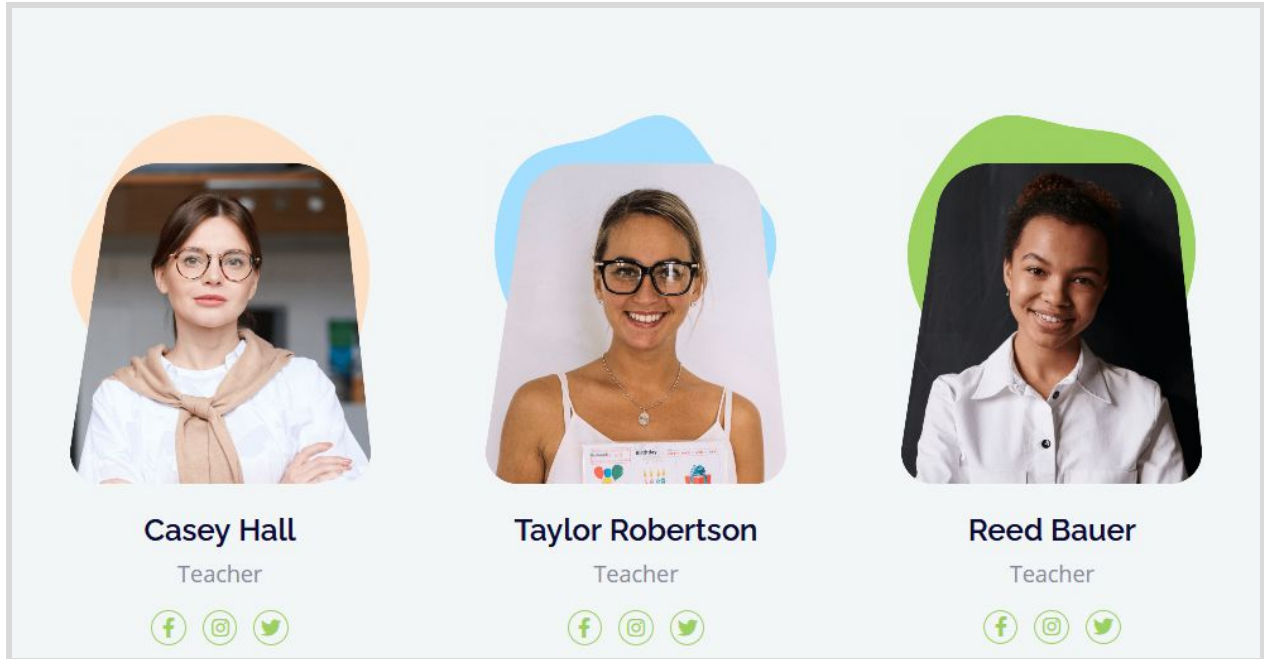
An individual employee page is generated automatically when you add an employee.

If you want to make an employee page more informative and engaging, you can 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:



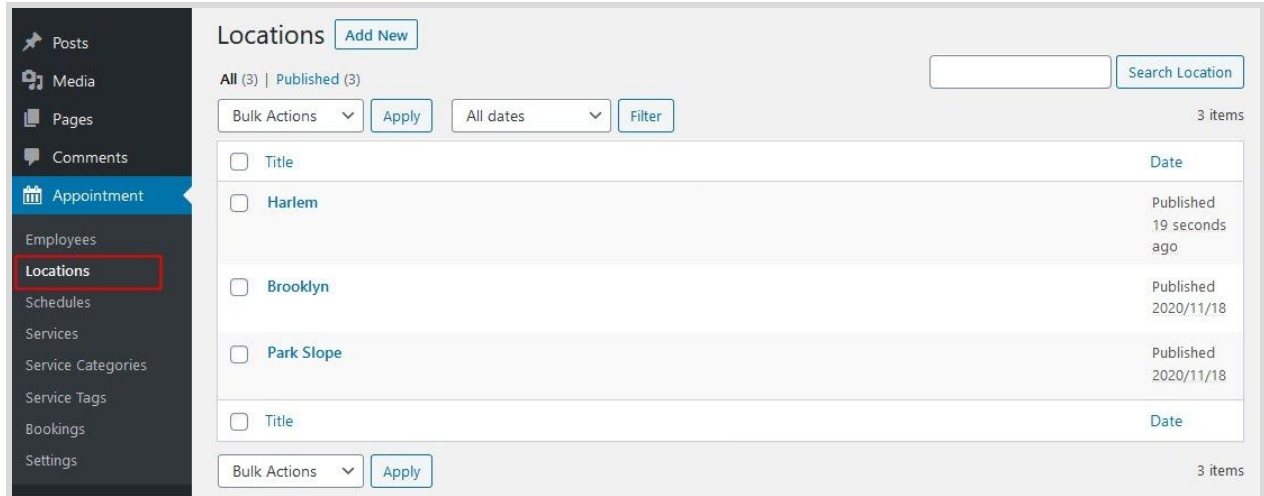
To create a team page, just add a new page and display your employees in any preferable way with links to their profiles/pages:



## 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.



Edit Schedule [Add New](#)

Daniel's schedule

Schedule Settings ^ v ▲

**Employee**  ▼  
To which employee this schedule applies.

**Main Location**  ▼  
The location where the employee spends the major amount of time.

### 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.

Timetable

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
11:30 am — 7:00 pm <i>Working hours</i>	2:00 pm — 9:30 pm <i>Working hours</i>	12:00 am — 9:00 pm <i>Working hours</i>	12:00 am — 9:00 pm <i>Working hours</i>	12:00 am — 9:00 pm <i>Working hours</i>	12:50 pm — 3:40 pm <i>Working hours</i>	
1:40 pm — 2:50 pm <i>Lunchtime</i>	2:40 pm — 4:20 pm <i>Break</i>	12:00 pm — 12:30 pm <i>Lunchtime</i>	2:40 pm — 4:20 pm <i>Lunchtime</i>	2:40 pm — 4:20 pm <i>Lunchtime</i>		
5:50 pm — 6:00 pm <i>Break</i>						

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Day Of Week \*

Period Of Time \*  —

Activity Type \*

Location

The scheduling flexibility of the plugin also allows you to add:

- *days-off* by choosing specific dates:

Days Off ▲

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Day / Period [Add](#)

---

< **November 2020** > **December 2020** >

Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7			1	2	3	4	5
8	9	10	11	12	13	14	6	7	8	9	10	11	12
15	16	17	18	19	20	21	13	14	15	16	17	18	19
22	23	24	25	26	27	28	20	21	22	23	24	25	26
29	30						27	28	29	30	31		

December 14, 2020 - December 17, 2020 [Remove](#)

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November 18, 2020 - November 21, 2020 [Remove](#)

Custom Working Days
▲

---

Day / Period

Working Hours

Add

---

<
**November** 2020
>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5
6	7	8	9	10	11	12

12:00 am ▼ -

2:30 am ▼

Add

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November 12, 2020 - November 14, 2020

12:00 am - 2:30 am

Remove

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.

<input type="checkbox"/>	Title	Price	Duration	Date
<input type="checkbox"/>	Bridal Styling	Free	2h	Published 9 hours ago
<input type="checkbox"/>	Men's Grey Blending	€70	1h	Published 9 hours ago
<input type="checkbox"/>	Botanical Hair Therapy Treatment	€45	1h 30m	Published 9 hours ago
<input type="checkbox"/>	Haircut	€60	1h	Published 9 hours ago
<input type="checkbox"/>	Blowdry Styling	€15	1h	Published 9 hours ago
<input type="checkbox"/>	Single Process Retouch	€50	1h 30m	Published 2020/11/19
<input type="checkbox"/>	Beard trim	€12	30m	Published 2020/11/18
<input type="checkbox"/>	Title	Price	Duration	Date

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

Employee	Price	Duration	
Giovanni Torez	55	30m	

Add Variation

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

### Eligible Employees

Employees

- Giovanni Torez
- Gloria Foster
- Daniel Berardi

Customize Service For Employee

Employee	Price	Duration	
<input type="text" value="Giovanni Torez"/>	<input type="text" value="55"/>	<input type="text" value="30m"/>	<input type="button" value=""/>
<input type="text" value="Gloria Foster"/>	<input type="text" value="60"/>	<input type="text" value="20m"/>	<input type="button" value=""/>

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 add-on - [Stratum widgets](#):



# The Complete Introduction To Mathematics and Logics

Home → The Complete Introduction To Mathematics and Logics

Overview Curriculum Instructor Reviews

## 1. Change simplification ^

General introduction to customer-centric strategies 1h, 20 min – 6 lessons

Lesson 1: Simple, attainable goals	20 min
Live meeting about Infotech Strategies	16 min
Quiz 1: Yes or No?	20 min
Lesson 2: A/B Testing	16 min
Quiz 2: Yes or No?	20 min
Lesson 3: Wrap up about A/B testing	16 min
Quiz 3: Yes or No?	20 min

**\$100.00**


**Duration** 15 weeks

**Lectures** 4

**Enrolled** 756 students

**Language** English

**Deadline** English

 **John Doue**  
Teacher

**BUY COURSE**

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:

## Recent Courses



### The Complete Introduction To Mathematics and Logics

4,5k+ Students 4 Lectures



Casey Hall



### Stanford Introduction to Food and Health

4,5k+ Students 4 Lectures



Kamron Skinner



### IT Fundamentals for Cybersecurity

4,5k+ Students 4 Lectures



Joseph Ross

### Service categories & tags

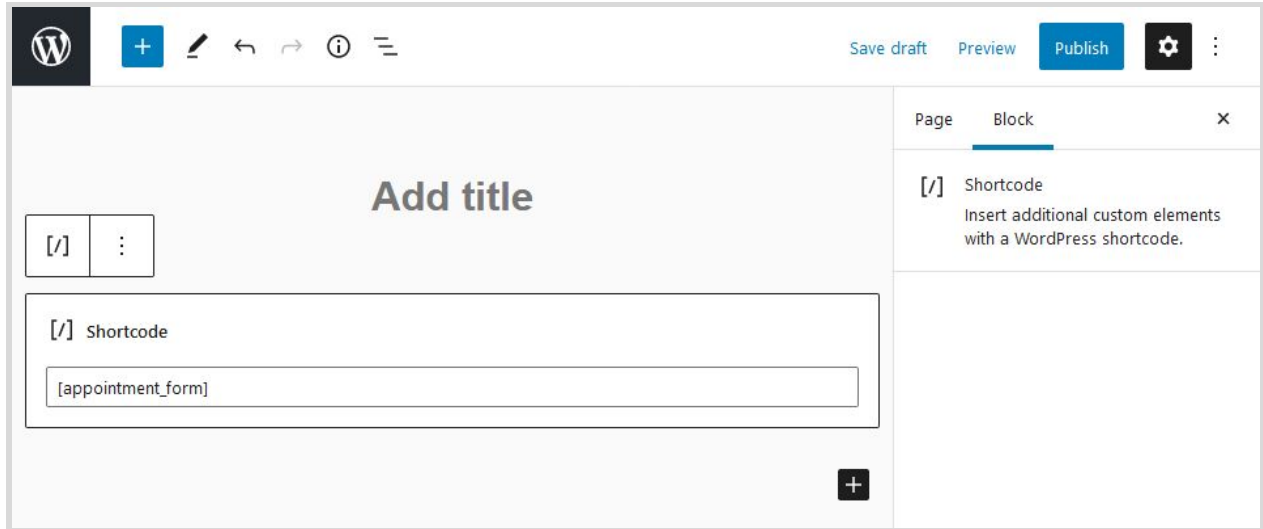
In the Service categories and tags menu, you can add categories that will simplify and speed up the search of a service via the booking wizard on your site.

## Add a Booking Wizard to the Site

To add a booking wizard to your site, copy and paste this shortcode, then place it on any page:

**[appointment\_form]**

You can do that in both the Classic Editor or the block editor via the Gutenberg shortcode block.

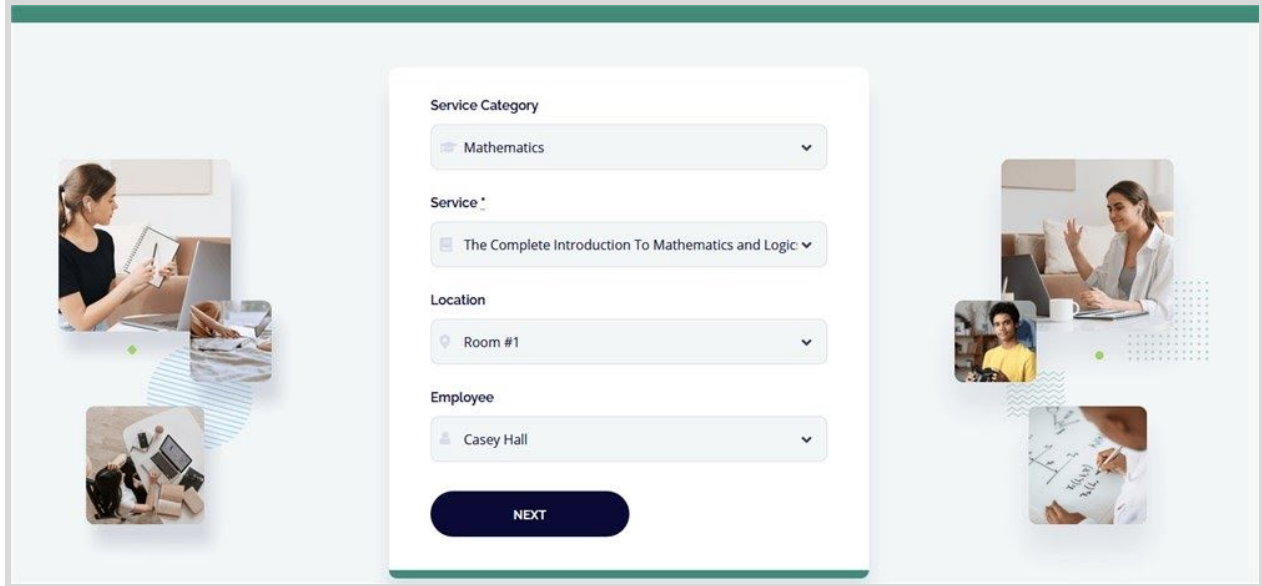


After you've added this shortcode, save the page. You can actually add it to multiple pages.

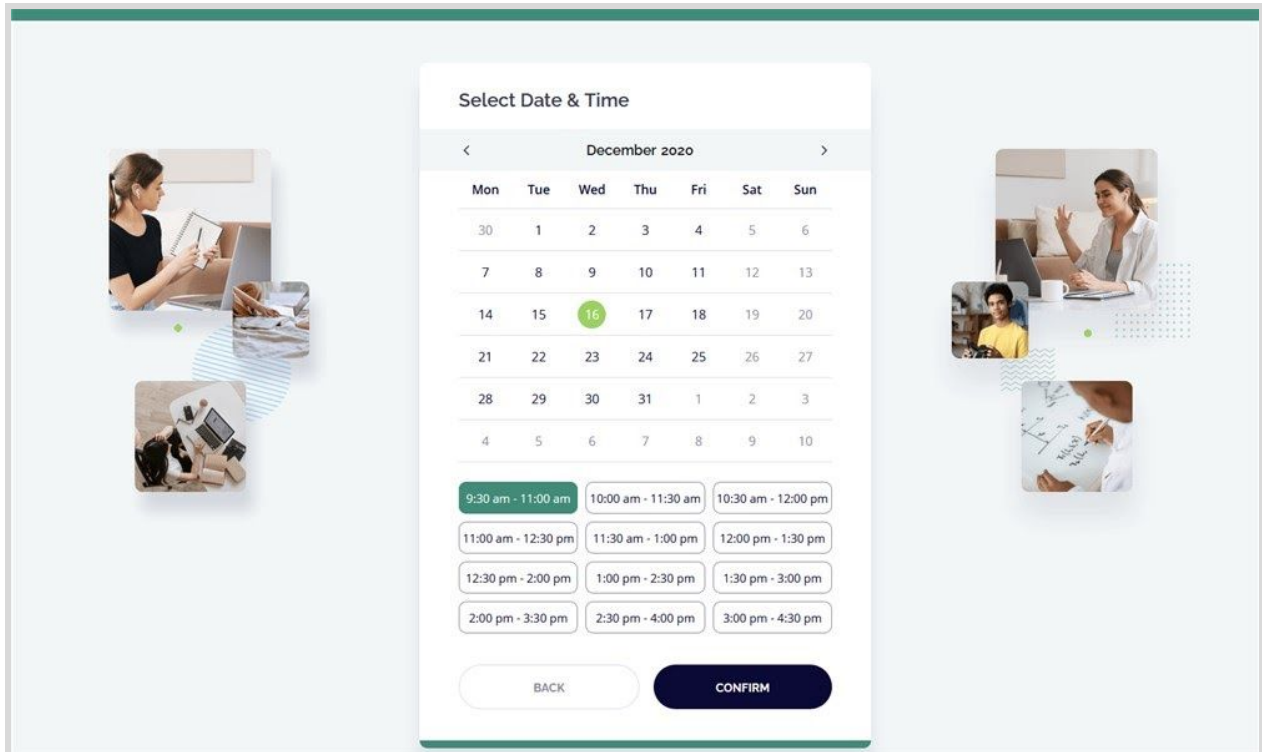
The shortcode will run the one-page booking wizard for your clients, where they'll be offered to complete several steps to submit a booking.

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).

**Reservation Details**

Service:  
The Complete Introduction To Mathematics and Logics

Date:	Time:	Price:
Dec 16, 2020	9:30 am - 11:00 am	€100

Name \*

Email \*

Phone \*

[BACK](#) [SUBMIT](#)

## 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)

**Update Booking**

Status:

Created: 3, 2020 @ 4:17 pm

[Move to](#)

[Update](#)

- Booking details (total price and personal customer details)

### Booking Price



Total Price

12

Reserved Services

Service	Employee	Location	Price	Date	Time
Beard trim	Giovanni Torez	Brooklyn	€12	November 23, 2020	1:00 pm - 1:30 pm

### Customer Info



Name

Ann

Email

Parker

Phone

12345678