



ONLINE PHARMACY APPOINTMENT SCHEDULER: V2 ADMIN MANUAL

Online Pharmacy Appointment Scheduler is a mobile friendly Solution that allows you to seamlessly manage your customer appointments.

TABLE OF CONTENTS

<u>CHANGING YOUR USERNAME AND PASSWORD</u>	<u>3</u>
<u>CUSTOMER EXPERIENCE - FRONTEND</u>	<u>3</u>
- Book an appointment	
<u>PHARMACY EXPERIENCE - BACKEND.....</u>	<u>5</u>
- CALENDAR TAB.....	5
- Display Calendar	
- Book an appointment/Select Unavailable Period	
- Edit/Delete an appointment	
- CUSTOMERS TAB.....	8
- Add, delete, edit customer information	
- PHARMACY/ADMINS TAB.....	8
- Providers Tab	
- Add, delete, edit providers	
- Admin/Users Tabs	
- Add, delete, edit admins/users	
- SERVICES TAB.....	10
- Add, delete, edit pharmacy services	
- Adding Forms	
- SETTINGS TAB.....	12
- General Tab	
- Business Logic Tab	
- Working Plan and Breaks	
- Book Advance Timeout	
- About Amjay Appointments Tab	
- Change Email/SMS Fields Tab	
- REMINDER EMAIL TAB.....	14
- REMINDER REPORTS TAB.....	15
- REPORTS TAB.....	16
- Printing your calendar	
- TROUBLESHOOTING.....	17
- ERRORS	
- EMAIL FORWARDING.....	17

CHANGING YOUR USERNAME & PASSWORD

1. After logging in for the first time, you will need to change the Admin temporary USERNAME and PASSWORD. To do so, go to the Pharmacy/Admin tab, then Admins. Here you can change the credentials for all Admins as well as add other admins for the software. Users can also be added under the Users tab.

CUSTOMER EXPERIENCE-FRONTEND

Booking An Appointment

- 1) Customers select the service they want and click the “next” button.

Test Pharmacy 1 2 3 4

Select Service

Select Service

Flu Shots

Flu Shots
Flushots
[Duration 15 Minutes]

Next ▶

- 2) They then select the date and time they want to book by simply clicking on the calendar and the desired time

Select Appointment Date And Time



Calendar for August 2020. The days of the week are labeled: Su, Mo, Tu, We, Th, Fr, Sa. The dates 11 and 12 are highlighted with green circles.

9:00 AM 11:45 AM 3:00 PM 5:30 PM
9:15 AM 12:00 PM 3:15 PM
9:30 AM 12:15 PM 3:30 PM
9:45 AM 12:30 PM 3:45 PM
10:00 AM 12:45 PM 4:00 PM
10:15 AM 1:00 PM 4:15 PM
10:30 AM 1:15 PM 4:30 PM
10:45 AM 1:30 PM 4:45 PM
11:00 AM 1:45 PM 5:00 PM
11:30 AM 2:00 PM 5:15 PM

◀ Back Next ▶

3) They are prompted to fill in all required fields with their personal information

Fill In Your Information

First Name *	Address
<input type="text"/>	<input type="text"/>
Last Name *	City
<input type="text"/>	<input type="text"/>
Email *	Postal Code
<input type="text"/>	<input type="text"/>
Cell Phone Number *	Fields with * are required!
<input type="text"/>	

4) The final step is to confirm all information is correct

Confirm Appointment

medchecks

Med Checks

12/08/2020 9:00 AM

0.00 CAD

TEST TEST

Phone: 1234568750

Email: a@a.com

Address: 123 anywhere street

City: Brampton

Postal Code: L8J9KS

◀ Back

✔ Confirm

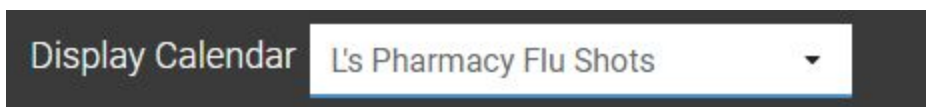
5) The customer and the pharmacy will receive an email with the appointment details. If configured, the customer will also receive an SMS text confirmation message.

PHARMACY

EXPERIENCE-BACKEND

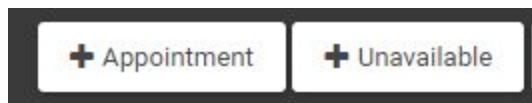
CALENDAR TAB:

Display Calendar



You can display the appointments by service and provider. Provider calendars will display all appointments that are booked for the specific provider. Service calendars will display all appointments that are booked for the specific service.

Book An Appointment & Select Unavailable Period



MANUALLY ENTERING A CUSTOMER APPOINTMENT

To book an appointment for your customer, click the “+Appointment” button, fill in all necessary fields, and select the customer you would like to book for. If the customer is not already in the database select “New”

The screenshot shows a form titled 'New Appointment' with a green header and a close button (X). The form is divided into two main sections: 'Appointment Details' and 'Customer Details'.
Appointment Details:
- Service *: Flu Shots (dropdown menu)
- Start Date / Time: 09/07/2020 12:30 AM
- Provider *: Millie Majithia (dropdown menu)
- End Date / Time: 09/07/2020 12:40 AM
- Notes: A text area with a slash icon for editing.
Customer Details:
- Buttons: 'New' and 'Select'.
- Fields: First Name *, Address, Last Name *, City.

UNAVAILABLE PERIOD

To block off an unavailable period press “+Unavailable”
Add the start/end times and save.

The screenshot shows a form for entering an unavailable period. It has two main sections: 'Start' and 'End'.
- Start: 11/08/2020 2:30 AM
- End: 11/08/2020 3:30 AM

Edit/Delete Existing Appointment

You can view the expanded details of an appointment by clicking on it in the calendar.

Brians Pharmacy Clinic - AMI MAJITHIA

Start	08/07/2020 3:45 PM
End	08/07/2020 4:15 PM
Service	Brians Pharmacy Clinic
Provider	Russ Mehta
Customer	AMI MAJITHIA
Email	678454@pdsb.net
Phone Number	14166978740

[Edit](#) [Delete](#) [Close](#)

From here, you can edit or delete the appointment by clicking the appropriate buttons.

EDIT APPOINTMENT:

When the “EDIT” button is clicked, a pop up box is shown with the appointment information. You can make any desired changes to the applicable fields.

Appointment Details

Service *	Start Date / Time
Flushots	06/08/2020 10:00 AM
Provider *	End Date / Time
Flu Shots	06/08/2020 10:30 AM
Notes	

DELETE APPOINTMENT:

When the “DELETE” button is clicked, you will be prompted for the reason you are cancelling this appointment. **The message you enter here will be included in the delete confirmation email that will be sent to the customer.**

Delete Appointment

Please take a minute to write the reason you are deleting the appointment:

OK Cancel

CUSTOMERS TAB:

Edit, Delete, Add Customers

With the Customer tab, you can edit, delete, and add customers and see all appointments for each customer.

When manually booking customers on the backend, there are instances where you do not have an email for the required field. For this reason, for the customer email field on the backend only, you are able to use any combination of numbers/letters for this required field as long as each customer email has a unique letter/number combination (ex. 1, 2, 3, 1a, 2a, 2b, 3c)

The screenshot shows a web interface for managing customers. At the top, there are search and filter icons, followed by '+ Add', 'Edit', and 'Delete' buttons. Below this is a table with three columns: 'Customers', 'Details', and 'Appointments'. The 'Customers' column lists five entries with their names, emails, and phone numbers. The 'Details' column shows a form with fields for First Name, Last Name, Email, Phone Number, Address, and City. The 'Appointments' column is currently empty.

Customers	Details	Appointments
paio rkk majithiamillie@gmail.com, 4166978740	First Name *	
oijkidj fasdf sdfstfd@test.ca, jkifjksdj	Last Name *	
Ajay Majithia ajay.majithia@gmail.com, 4166978740	Email *	
pappu pappu amimajithia@gmail.com, 4166978740	Phone Number *	
AMI MAJITHIA 678454@pdsb.net, 14166978740	Address	
	City	

TO edit or delete, select an existing customer and press “edit/delete”
TO add, select “add” and type in the required information.

PHARMACY/ADMIN TAB:

The Pharmacy/Admins tab is where you can manage all the credentials and information for the pharmacy users.

Admin and Providers

ADD, EDIT, DELETE ADMINS AND PROVIDERS

Adding, editing, and deleting providers and admins is very similar.

To edit providers -> PROVIDERS

To edit Admins -> ADMINS

To edit User -> USERS

Both DETAIL fields are the same:

First Name *	Username *
_____	_____
Last Name *	Password *
_____	_____
Email *	Retype Password *
_____	_____
Phone Number *	Calendar *
_____	Default ▼
Mobile Number	<input checked="" type="checkbox"/> Receive Notifications

To receive notifications each time there is a change to the calendar, check-off the “receive notifications button” at the bottom.

PROVIDERS:

Providers are the who and where the service takes place.

In the providers section, you must type in the pharmacist name and information.

The unique ID # you associate with the service can be any unique combo of letters or numbers, (ie 1, 2, 3,) but you must ensure each service ID# is unique from the other ID#'s you use for different services in the appointment scheduler.

In the services field, check off the services for the specified provider.

Services

medchecks

Flushots

A username and password can also be entered here to allow access to only specific people for that service in the appointment scheduler.

The “Working Plan” tab allows you to establish the hours and breaks that are specific to that pharmacist!

Working Plan

Working Plan

[Reset Plan](#)

Day	Start	E
<input type="checkbox"/> Sunday
<input type="checkbox"/> Monday
<input type="checkbox"/> Tuesday
<input type="checkbox"/> Wednesday
<input type="checkbox"/> Thursday
<input type="checkbox"/> Friday
<input type="checkbox"/> Saturday

Breaks

USERS:

You can also add users under the users tab. Users have limited rights within the scheduler. They can view all appointments made as well as add, delete, and edit

appointments for the providers that are selected in the user configuration. Users cannot edit other users or providers, add services or change any of the software settings.

SERVICES TAB:

The Services tab contains the information about all the services offered at your Pharmacy.

SERVICES:

Allows you to add any service - such as Flu Shot appointments.

TO edit or delete a service, select an existing service and press “edit/delete”

TO add a new service, select “add” and type in the required details.

Details

Name *

Duration (Minutes) *

Price *

Currency

Category

- No Category -



Availabilities Type

Fixed



Attendants Number *

Attendants number is how many people can book an appointment in the same time slot. For example, if you are ok to book 2 patients for the same time slot, enter 2 in the attendants number.

Forms

You can add up to 3 forms for download per service. Use the Service Links fields to add forms to the scheduler. Each Service Link is numbered 1 to 3. Use the appropriate Service Link number for each form and follow the instructions below for adding forms to the scheduler.

Service link: If you would like to add a form specific to the service being offered- you can add a hyperlink to that form in “Service link”. The hyperlink is a URL of where the form resides for download.

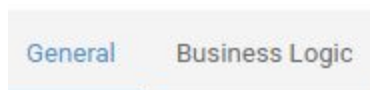
Service link name: the name you enter here will appear as the form name to your customers. This is what your patients will see as the title for that form

Service link description: information entered here will show up as a description of the form for your customers

***Please note you cannot add a form link in the Service Link description section - it will not show up as a hyperlink your customers can click on. Therefore, you must type the link into the service link fields.


SETTINGS TAB:

There are 2 main settings - “general” and “business logic”



GENERAL:

General Settings Save

Company Name * Brians Pharmacy  <small>Company name will be displayed everywhere on the system (required).</small>	Google Analytics ID UA-XXXXXXX-X <small>Add your Google Analytics ID to be included in the booking page.</small>
Company Email * majithiamillie@gmail.com <small>This will be the company email address. It will be used as the sender and the reply address of the system emails (required).</small>	Date Format DMY <small>Change the date display format (D - Date, M - Month, Y - Year).</small>
Company Link * https://cryptodash27.online/ <small>Company link should point to the official website of the company (required).</small>	Time Format H:MM AM/PM <small>Change the time display format (H - Hours, M - Minutes).</small>
	Customer Notifications <input checked="" type="checkbox"/> Receive Notifications <small>Defines whether the customer will receive email notifications whenever there is a schedule change on one of his appointments.</small>
	CAPTCHA <input checked="" type="checkbox"/> Require CAPTCHA <small>When enabled, the customers will have to type a random generated CAPTCHA</small>

Customer notifications and Google RECAPTCHA can be enabled/disabled here by clicking the corresponding blue buttons. Pharmacy information can also be changed in general settings.

BUSINESS LOGIC:

The work plan and breaks are applied to every NEW provider's working plan - it does not change an already established provider's work plan. The "book advance timeout" setting allows you to define how far in advance of the appointment, your customers can make alterations or edits.

Book Advance Timeout

Timeout (Minutes)

30

Define the timeout (in minutes) before the customer can cancel the appointment with the company.

Business Logic Save

Working Plan

Mark below the days and hours that your company will accept appointments. You will be able to adjust appointments in non working hours but the customers will not be able to book appointments by themselves in non working periods. This working plan will be the default for every new provider record but you will be able to change each provider's plan separately by editing his record. After that you can add break periods.

Day	Start	End
<input checked="" type="checkbox"/> Sunday	9:00 AM	6:00 PM
<input checked="" type="checkbox"/> Monday	9:00 AM	6:00 PM
<input checked="" type="checkbox"/> Tuesday	9:00 AM	6:00 PM
<input checked="" type="checkbox"/> Wednesday	9:00 AM	6:00 PM

Breaks

Add the working breaks during each day. These breaks will be applied for all new providers.

[+ Add Break](#)

Day	Start	End	Actions
Sunday	11:20 AM	11:30 AM	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Sunday	2:30 PM	3:00 PM	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Monday	11:20 AM	11:30 AM	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Monday	2:30 PM	3:00 PM	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
Tuesday	11:20 AM	11:30 AM	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>

ABOUT AMJAY APPOINTMENTS

This where you can access the Online Pharmacy Appointment Scheduler manuals and videos.

CHANGE SMS/EMAIL FIELDS

You can edit the email fields, SMS fields, and activate or deactivate the SMS function of the appointment scheduler. To learn more about a specific field simply press the “information” picture.

Please ensure you update these fields in the settings to contain your Pharmacy contact information.

If you would like to go back to the appointment engine, simply press the black back arrow.



Email Fields

Provider Confirmation Email Header ⓘ

A new appointment has been added to your plan.

User Confirmation Email Header ⓘ

Your appointment has been successfully booked!

Once you have edited any fields necessary, press submit.

If you see a blank page after submission just proceed back to the appointment engine - the settings have been saved.

REMINDER EMAIL TAB:

CONFIGURE EMAIL REMINDERS

If requested, email reminders can be added as an extra feature in your scheduler.

Email Reminders are sent out the day before the appointment. The reminders go out at 12am EST everyday for the next day. For example, if an appointment is scheduled on Jan 26, a reminder will be sent on Jan 25 at 12am. If you would like reminders to go out at a different time or interval of time - please contact us.

You can configure the email reminders in settings in the “Configure Reminders” sub tab. This will take you to the email reminder setup page where you will first need to pick the appropriate service you want to send the reminder for.

Once you have selected the service, you can then set the email headers, descriptions and other information customizing what your appointment reminder email will look like. Simply click on the “i” button beside the input boxes to clarify what part of the email you are configuring.

You can also turn email reminders on and off BY SERVICE simply by toggling the on/off. Once everything is configured to your liking, press the “submit” button and the message “successful return to mainpage” will appear. You can then return back to your scheduler.

Reminders Configuration Page

REMINDER REPORTS TAB:

Reminders report - View all reminders sent

To see all the appointment reminders that have been sent out, simply navigate to the reminder report tab. Search by service and date of when the appointment was scheduled (start date of appointment)...NOT when the email reminder was sent.

Select the date range of the calendar in the dropdown. To put a custom range PRESS CUSTOM RANGE.

PRESS LOAD. Once the table is loaded, you will be able to view it online. You can also print it off by exporting to PDF or EXCEL in one of the formats. Doing a web print will not show all information.

Amjay Software Send Reminders Report

List All Sent Reminders

Select Service

Load

Download XLSX

Download ODS

Download CSV

PDF

Service Name	Start-date	Start-time	End-time	First Name	Last Name	Email	Date Sent	Email Header Sent	Email Desc Sent	Status
Flu Shots	Tuesday January 26	00:00:00	00:30:00	TEST	TEST	majithiamillie@gmail.com	2021-01-25	FLU SHOT	FLU SHOT	sent

REPORTS TAB:

Appointment report - view all appointments

To print your appointment schedule or to view all appointments in a table format by service, go to the reports tab in the backend.

Simply select the date range of the calendar in the dropdown. To put a custom range PRESS CUSTOM RANGE.

Next select a service (same services in backend) and press LOAD.

Once the table is loaded, you will be able to view it online. You can also print it off by exporting to PDF or EXCEL in one of the formats. Doing a web print will not show all information.

Amjay Software Appointment Report

List all appointments

 Dec 15th, 2020 - Dec 15th, 2020

Select Service

Flu Shots

Load

Service Name	Start-date	Start-time	End-time	First Name	Last Name	Email	Phone Number	Date booked	Time booked	Customer Notes	Backend notes
No data available in table											

TROUBLESHOOTING:

ERROR MESSAGE:

If you experience any type of error, a simple refresh of the page and clearing of cache is typically all it takes to resolve the issue. If the problem persists, please contact us at:

info@amjaysoftware.com

1-800-385-6853

FORGOTTEN PASSWORD

AS AN ADMIN

If you forget your password as an admin, you must go to the login page and press “Forgot password”. You will then type in your email and your username entered into the system under that admin and you will receive an email with your credentials.

AS A PROVIDER/USER

To reset a provider’s password simply go through as the admin in the backend and change it.

EMAIL FORWARDING:

All replies to the customer confirmations emails will be forwarded to the pharmacy email.