How to use Appointment King!

**STEP ONE:**

First, you are going to want to go to the Appointment King website at: appointmentking.com

You will see a section at the top left-hand corner to Login

I will provide you with username & password

That link will take you to a page to put in your username and password!

Once you have logged in, Appointment King will take you to the last page you had been before you logged off. It will probably look something similar to this:
This is showing JUST Courtney Brannon’s availability. If you would like to see ALL availabilities, you can click on the “Availabilities” drop down right above the calendar and select “All Staff”:
To create an available appointment, you can click anywhere on the calendar on the day you want to tutor (it might be best to select a date a week or two in advance, to give students the time to book the appointment). It will bring up a pop-up like this one:

![Create Availability Pop-up](image)

Make sure to select the correct employee under “Select Employee”. You do not have to select anything under “Select Resource”. Since this is an hour-long commitment, tutors will select one hour at their convenience. If they would like to volunteer more than one hour, they will have to create multiple availabilities. Select the option for “No Repeat” and then press “Submit”.

Once submitted, you will be taken back to the calendar, and you will have a new appointment availability. Available (not booked) appointments are yellow.
**STEP TWO (OPTIONAL) MANUALLY BOOKING APPOINTMENT:**

If you want to manually add an appointment to this timeslot, you can by clicking on the green plus sign button on the top right corner of the yellow box. (*Tutors will only use this function if they already know the student they will tutor*)

This will pop up an “Add Appointment” box. Select the “English Tutoring” option under “Details” and select the time that the tutor selected. You can search for the student under “Member Search”. *Remember, a student is called a “member” and a tutor is called a “trainer” a lot on Appointment King.* Type in the students’ name, select their name when it comes up, and their name should be added to the “Added Members” section on the right. You can add notes to the appointment like: “Danae wants to work on future tense and pronunciation”. Press submit when completed. *This feature is only to be used when the tutor and the student know each other and want to be matched. Otherwise, students will go through a separate portal to select a tutor.*
When a student has been added to an available timeslot, the appointment is now BOOKED and will look like this:

<table>
<thead>
<tr>
<th>6am</th>
</tr>
</thead>
<tbody>
<tr>
<td>7am</td>
</tr>
<tr>
<td>8am</td>
</tr>
<tr>
<td>9am</td>
</tr>
</tbody>
</table>

The box will now be red with a smaller orange box within it. If you hover your mouse over the orange box you can see the details of the appointment.

If a tutor does NOT know their student, then they will have to wait until a student books their appointment time. When a student selects their appointment time, the tutor and the student will both receive confirmation emails about their appointment. The tutor will be sent students’ contact information, and the student will receive a text message reminder 24 hours in advance.

**STEP THREE CREATING MULTIPLE APPOINTMENTS:**

**ONCE A TUTOR HAS BEEN MATCHED WITH A STUDENT** the tutor will need to login to Appointment King once more to book that student for the following weeks (minimum 4 weeks required). The tutor will go to the schedule and find “Multi Appointments” on the top right. It looks like this:
It will bring up a new window where you will select “English Tutoring” under “Details” and then your name. Then you will search for your matched student under “Member Search”. Make sure that once you type in their name that you hit “Enter” or press “Go” and then click on your students name below. Your students name should then transfer over to “Added Members”.

You will then need to select “Create New” under “Availability” and select the next tutoring session day and time. So if your first Appointment was on Thursday, June 28th, then your next appointment will be the following Thursday—July 5th, at the same time as the previous appointment. You would then select all of the following Thursdays for however long you plan to tutor. The dates will turn from white to blue. Then press the blue plus sign to add once finished.
Your selected dates are now on the right under “Selected Dates & Times”. It will look like this:

![Image of selected dates]

Press “SUBMIT”
**STEP FOUR** MARKING APPOINTMENTS:

Tutors will have to mark the result of the appointment as either: *Completed, No-Show, Rescheduled, or Cancelled*. They can do this by simply clicking on the orange box inside of the appointment. This will bring up a box called “Edit Appointment”:

![Edit Appointment](image)

If a tutor does not mark their appointment as “Completed” then we are to believe that that appointment never happened. This will help us with data entry. If the student does not show, the tutor will mark “no show” and if they (the tutor or the student) cancelled, then they will mark the appointment as “cancelled”. If the tutor and student spoke and they are not able to meet at their allotted time, then they can reschedule. Once they select that option, another pop up will occur, giving them the option to select a new date and time:
Select “Create New” and choose the date and time that works best for both the tutor and the student. Then select the blue plus button to the right of the time. This will confirm the new appointment time:

You should now see “Reschedule On” with the new date and time underneath. If this is correct, press Submit!!
You will be taken back to the calendar and now your appointment is yellow with a black and white striped box within it. On top of that box you will also see a small calendar. This means that that appointment has been rescheduled! Hover your mouse over that box to see the details of the appointment. You will be able to see who the student is, when it was supposed to take place, the outcome of the appointment, and when it was rescheduled to. It looks like this:

If you cancel an appointment instead of rescheduling it, it will look like this:

If you have any questions or concerns, please feel free to reach out to Courtney Brannon at cbrannon@ymcaboston.org