Welcome!

Welcome aboard, we're thrilled to have you join our community.

This document will be your guide to exploring the My Appointments core features.

We are dedicated to providing exceptional support to our users. If you ever need assistance, our friendly team is just a click away. You can reach us via live chat, located on the bottom right of every page when you're logged in, or email support@myappointments.app. Whether you have questions, need guidance, or have suggestions you'd like to share, we're here to help you every step of the way.

Our mission is to save you time and money while stimulating practice growth. By helping automate as many processes in your practice as possible, we can reduce your administrative burdens so that you can focus on what you do best, helping your clients.

We've put a lot of love into crafting the ultimate practice management system and look forward to showcasing how it can help support you in building and maintaining a successful practice.

Anil & Claudia Co-founders
www.myappointments.app

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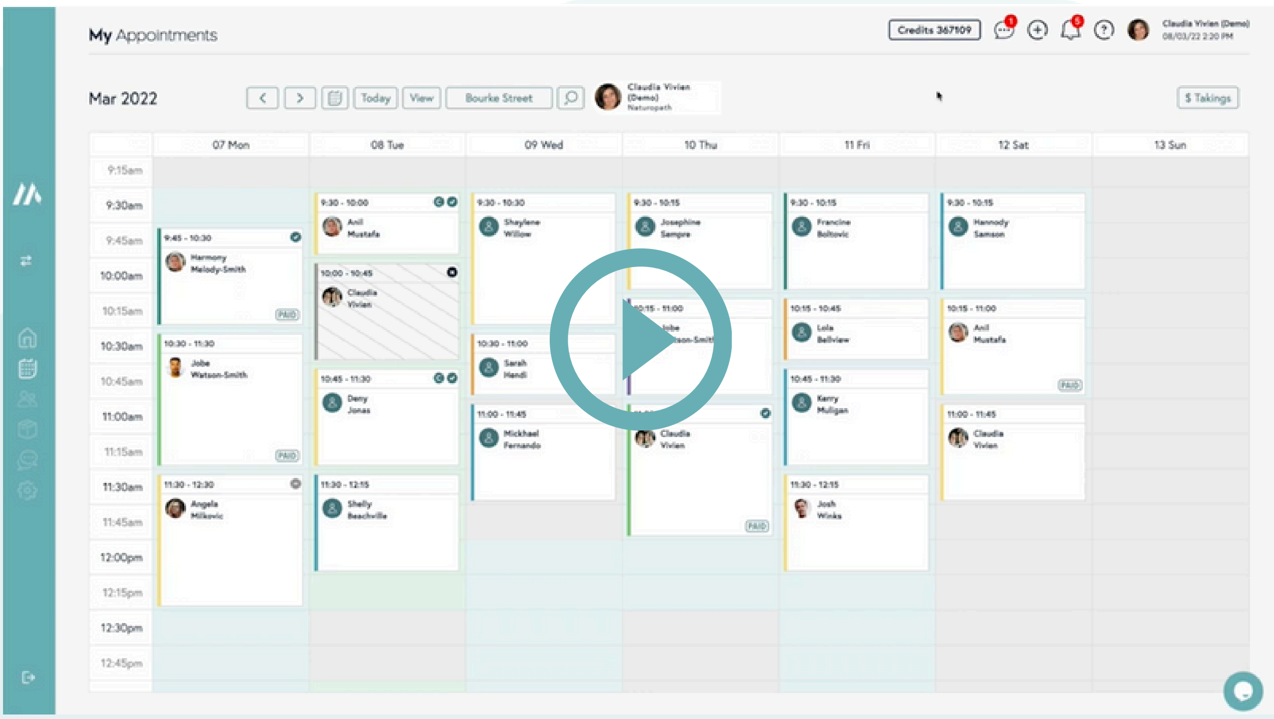
Getting started

QUICK TIPS

Using a practice management system for the first time can be quite daunting. To save you time, we've pre-loaded all of the settings you'll likely need to get started. All you need to do is fill in some basic details including business name, ABN and address. If you prefer, you can also go straight to our Guided Setup where you can seamlessly adjust any settings to personalise your account to suit your needs.

Here are some quick tips:

- Click on a time in your calendar to quickly add an appointment
- Drag and drop appointments into a new time slot to easily reschedule
- Click on a booked appointment to perform any appointment-related actions
- Click on your client's name anywhere you see it to access their file
- When clients reply 'Yes' to reminders to confirm their attendance, we'll automatically update the appointment status to 'Confirmed'
- Via the bell icon, we'll notify you of all actions your clients take including submitting intake forms, tests, payments, bookings, product orders and more
- Watch the intro video below to familiarise yourself with My Appointments



Clients

Adding a client

There are two ways to add a new client. At the top of every screen, you'll see a (+) button. Click this then select 'Client' and fill in the details. If you'd like to add a client at the time of booking, just click on a time in your calendar and click the (+) icon beside the client name field. See our help desk article here for more details.

Importing clients

If you have an existing client list you'd like to import, you can do so via our import feature. The supported file format is a CSV file and it must contain at a minimum, a unique client ID, and the client's full name. It is strongly recommended that your file also contains your client's mobile number and/or email address which will allow them to book online and manage their appointments, invoices, treatment recommendations and more. Once your client list is imported, you can also import appointments and treatment notes. For more details, see here.

Client card

Your client card is the file that contains all the pertinent information about your client. To find the file, you can click your client's name wherever you see it within My Appointments, or you can go to the My Clients tab and search for your client's name. Read more here.

Clients

Intake forms

Say goodbye to traditional pen and paper intake forms and hello to the countless data entry hours you'll save with our automated and customisable intake forms. This provides a wonderful opportunity to get to know your clients' presenting condition/s before they have even walked in the door. To get you started, we've created a template that can easily be modified to suit your needs. Any data entered by your clients, including any uploaded test results, will automatically be added to your client's file. Read more here.

Customised note templates

To help ensure you collect all the relevant information for each appointment type, you can create unlimited treatment note templates. When a specific service type is booked, we'll automatically show the template you've set. From your Treatment Note settings, you can turn on/off any relevant fields and add your own custom fields or segments. We suggest turning on the Recommendations tab as it will allow you to send treatment recommendations and plans to your clients. Read more here.

Treatment recommendations

To write treatment notes, just click on a booked appointment, then click Appointment Notes. You'll either see our default SOAP notes or, if you've customised your note template as above, you'll also see your own fields as well as the Recommendations tab. From here, you can type any notes and attach files or treatment plans. Your client will receive a copy by email, and they can also log in at any time to access your recommendations from their My Appointments login.

Appointments

Booking appointments

There are two ways to add an appointment. You can either click on any time slot in your calendar or click the (+) icon at the top right of any page while logged in. Pick your time, confirm the appointment location (if you operate from more than one location) and hit confirm to finalise the booking.

Telehealth

To help save practitioners and their clients time, we've created our own custom and fully automated video calling feature with one-click access. Whenever a telehealth session is booked, it is automatically scheduled for a video call. All you and your client need to do is click one button to be connected to the same space. You can also set up an automated customised message 15 minutes before the consultation starts with instructions on how to join the call. Read more here.

Blocking off time

When you need to block out time in your calendar, all you need to do is click on a time in the My Appointments tab, then click the 'Block out time' tab beside the 'Book an appointment' tab on the slider. You can also click the (+) button at the top of any page, and select Block out. This setting will stop any patients from booking in via your online link during those times. More details can be found here.

Editing an appointment

To make changes to an appointment, click on the appointment, then select the pencil icon. You can then edit the appointment type, time, or duration as needed. Our helpdesk article can be found here.

Appointments

Booking online

Via your Online Booking Settings, you can set booking, cancellation and reschedule lead times, select the service providers who offer online bookings, set up pre-payments and/or booking deposits, add custom cancellation wording and write custom text to display on your booking link. You can read more here. Below this setting, you'll find a booking code that displays a Book Now button on your website. You can also copy the booking link and add it to your website or share it directly with your clients.

Custom online availability

If you'd like your clients to book at specific times of the day, even if other times are available, you can set custom online availability. This will allow clients to only book at the specified times. Please note, the custom times set must be within your assigned working hours. For more details read here.

One-time availability

If you wish to enable online booking for times outside your regular operating hours, you can set up one-time availability. For detailed instructions on how to add one-time availability, please visit our helpdesk article here.

Calendar sync

If you'd like your appointments booked within MA to be synced with an external calendar such as iCal, Google Calendar or Outlook, visit the My Calendar Sync page. Please note that this is a one-way sync only, meaning any appointments added to your external calendar will not be updated in MA. More details can be found here.

Communication

Reminders

Reminders are a great way to increase your appointment attendance rates. By default, we've set reminders to automatically send 24 hours via SMS before any scheduled appointment. We've provided suggested wording, which can be fully customised. Timing and delivery method (SMS, email or both) can also be adjusted, as well as the text for each of the service types you offer. Read more here.

Welcome message

A warm and friendly welcome message to your clients before they come to see you create a great first impression. It also helps to build trust by giving clients valuable information about their first appointment. This includes the date, time, location and what to expect for their first session. In your settings, we've provided suggested wording that is fully customisable. You can choose to send the welcome message via SMS, email or both. The welcome message is automatically sent when you or your clients book their first appointment. If you have booking confirmations on, please note that the welcome message will be sent in place of this for the first appointment booked, i.e. your client will not receive both.

Booking confirmation

A booking confirmation ensures your clients have their appointment details in writing. This reduces the need for clients to contact you to confirm the time or day of the appointment, as they can refer back to the booking confirmation at any time. We've provided suggested wording that can be adjusted, as well as the delivery method (choose SMS, email or both). The booking confirmation will automatically be sent when you or your clients book their appointment.

Communication

Client follow-ups

Following up with clients strengthens relationships, boosts referrals, and increases bookings. To save time and improve retention, we've developed automation including acknowledging referrers and birthdays, following up on missed appointments and soon, recalls to allow you to see a list of clients who have not been in for a while. You'll find these settings on the My Dashboard tab. When you receive a notification, simply click the relevant box, customise or use our suggested message, and hit send. Read more here.

2-way SMS

2-way SMS allows clients to respond to messages. Each message sent to your client will come from a randomly assigned mobile number and will change with every communication sent. You can keep track of the conversation by clicking on the My Communication tab or the 2-way SMS (bubble) icon located at the top right of your page when logged in. If preferred, dedicated numbers can be purchased. Contact us for more details.

Communication log

Via your My Communication tab, you can keep track of all correspondence sent from My Appointments to your clients, as well as SMS replies from your clients to you. You can use the keywords search or filter results by sent type (SMS or email) or search for results with a specific client name.

Payments & Invoices

Online payment processing

My Appointments has a fully integrated payment processing solution. To process online payments, just click on any booked appointment, then Invoice. Under payment method, choose 'Online', then enter the amount to be paid and the card details. You may choose to tokenise the client's card by clicking 'Save card for faster payment next time?'. This stores the card encrypted and allows you to process future payments much quicker.

Tap payment processing

MA has its own integrated tap machine that allows you to process payment with the tap of a card or digital wallet. You'll need to purchase a terminal for the one-off cost of $68 (including GST and shipping). When you're ready, just click 'Tap', enter the amount, ask your client to tap or swipe their card, and the payment will automatically be updated, and the invoice will be marked as paid. To order a terminal, just click on the Tap button on any invoice and follow the steps. Read more here.

Offline payment processing

If you have an existing payment solution, or your client is paying cash, just click 'Other' on any invoice. Here, you can enter the amount and date of payment and choose one of the six payment methods provided.

Payments & Invoices

Sending unpaid invoices

If you need to send an invoice for payment, simply open the Invoice from booked appointment or the client's card, click 'Save' and choose 'Yes' to send the invoice to your client. This sends a secure link for your clients to seamlessly make payments. Once received, the invoice is automatically updated as paid, and a copy is sent to your client. We've provided default messaging that will be sent to clients, but you can adjust the wording and delivery method (SMS, email or both) of the invoice via your Invoice Settings.

Bulk payment requests

To save you the hassle of keeping track of owed invoices, we've created an automation that allows you to seamlessly view all outstanding invoices, as well as easily send a link to collect payment from your clients. Once you click 'Save' on any invoice, if a balance is outstanding, it'll automatically be added to the unpaid invoice list located on the My Dashboard page. From here, you can select to send an individual invoice or send it in bulk via email or SMS to your clients. Read more on this feature here.

Pre-payments, deposits, and securing appointments with a credit card

Our platform provides options to require clients to pay in full, pay a deposit, or provide their credit card details to secure bookings online. With a stored credit card, you can charge the client's card for services rendered or process a cancellation fee if the client cancels outside specified terms. You can configure these settings in the "Booking Online Settings". More details can be found here.

Claims

Online health fund claims

If your services are eligible for private health insurance claims, you can process on-the-spot rebates without the need for a terminal. You'll need a free Tyro account to use this feature. For a list of participating funds, please visit Tyro's website or to read more about this integration, please see our help desk article here.

Manual health fund claims

For Massage Therapists, Myotherapists and Nutritionists, we know how tricky it can be to ensure your provider numbers are correctly added to your invoices. For this reason, we've built automation to save you time. When you add your client's health fund via their client card, or your client adds it via your intake form, we'll automatically add your provider number onto each invoice. To read more on how to do this, please see this article.

Third-party billing

For third-party billing, we've created automation to make it easy to track the balance of allocated funding or the number of remaining sessions, as well as to seamlessly send invoices to third parties. Our help desk article here provides a full breakdown of how you can utilise this feature to keep track of third-party claims.

Settings

2-factor authentication

Otherwise known as 2FA, this is an optional process that provides a higher level of security to protect users' credentials and the data associated with their accounts. After entering your password when logging in, we'll send you a one-time code to your mobile or email. You'll need to enter this code to log in. Read more here.

Adding services, service categories & buffer times

Easily add or modify services and service categories using your Service settings. Simply click 'Add service' to create your initial service. For editing or deleting services, click the three dots next to each service type. To include a service category or set a universal buffer time, navigate to the Settings tab. Buffer times automatically allocate a default period between appointments, allowing you ample time to prepare for your next client. This setting can be applied universally across all services or tailored individually per service. For more details, read here.

Products and stock management

If you stock your own products, you can add them to the My Products settings and we'll help you keep track of your inventory. We'll also send you a reminder when your stock levels are low based on the Notify level you have specified at the time of adding your products.

Settings

Adjust your hours

You can adjust your availability or break times via the My Details page. This will automatically update your calendar as well as your online bookings. See more details here. Please note, if you have team members who need to adjust their hours, you'll need to do this via the My Team tab.

Invoice settings

To adjust the fields displayed on your invoices, set custom notes on each invoice or adjust the wording and delivery method for paid and unpaid invoices, go to your My Invoice setting. For more information about invoice settings, you can view our article here.

Other

Adding team members

If you have team members in your practice, you can create a profile for them via the_My Team tab. This will allow the user to log in to their own MA account and access whatever features and settings you have granted permission for. It is free to add an admin account. If you need to add a practitioner, there will be a cost of $15 - $19 per month, depending on the plan you are on. Read more here.

Takings

To view your transaction report, go to the My Income tab located on the left menu. The report includes details such as the date, client's name, invoice number, service provider's name, product or service description, the total cost of the product or service, payment method, the total amount paid, as well as the total GST (if applicable).

Prescribing products

If you stock your own inventory and prescribe products to clients, make sure you've turned the Prescriptions on in your treatment note templates. When taking your client's notes, you can seamlessly prescribe or recommend products and set script allowances. This allows clients to order and pay for products from their My Appointments login. You'll receive a notification for each order and can track the remaining scripts from the prescriptions table in the client card and appointment notes. More details can be found here.

Other

Client product ordering

To allow your clients to reorder prescribed products, you'll need to ensure you have reorders switched on in your Products settings. To do this, click the Products settings, and look in the re-orders column. From here, you can specify shipping costs, either fixed or weighted price. Once product recommendations or prescriptions have been made for your clients, they can log in to their My Appointments account to order and pay for products based on their script allowances. You'll get a notification once the order is received.

Changing your plan

If you'd like to change your plan, add calendars for team members, view your billing history and download receipts, or update your card details, you can visit the My Plan page located in the Settings tab. More details can be found in this article.

Find My Appointment

In the My Profile tab on the left side menu, you'll see an option to add a free profile on our soon-to-be-released advanced search practitioner directory, 'Find My Appointment'. Designed to maximise booking opportunities and help you connect with more of your ideal clients, Find My Appointment will be free for 12 months. You can find out more by going to www.findmyappointment.com.au. Your My Appointments credentials will allow you to log in to both websites, no need to create another login.