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# Registering an Outlet Manual

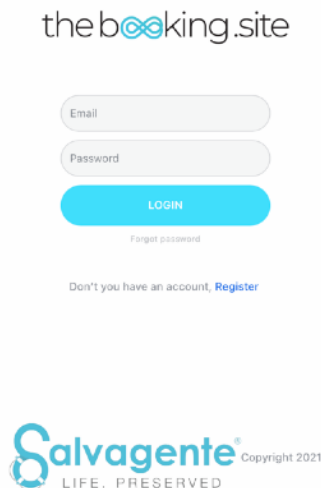
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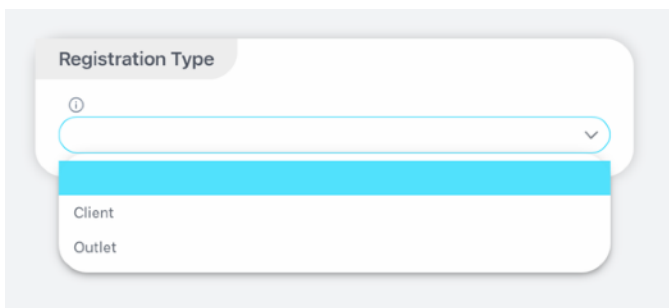
# REGISTERING AS AN OUTLET

## A. Register as a New Outlet

Go to [thebooking.site](https://thebooking.site) & click on “Register”



You will be given an option to choose between being a “Client” OR an “Outlet”.

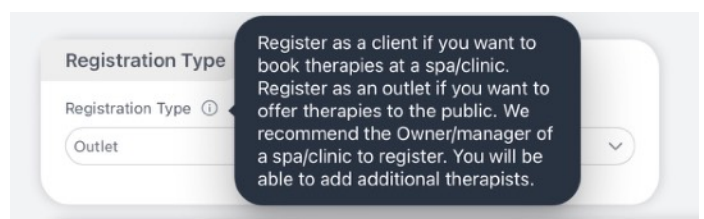


*You do not have to be an affiliated outlet of Salvagente to join [thebooking.site](https://thebooking.site) as an Outlet*

Click on “Outlet” & Fill out all your details.

All \* are compulsory details. The rest can be filled out to your discretion. It is however important to remember that the more information you give the more likely a new customer will be to click on your profile.

Throughout the site you will see information bubbles. You can click on them for more information regarding that specific heading.



## B. Setting up payment options

We require all outlets to be registered with one of the below payment gateways in order to enable us to transfer money to your account. **Stripe is used worldwide except for South Africa.** If your business is based in South Africa, then you'll need to register with Payfast. You will automatically be prompted based on the country you select.

Getting set up is very easy. See below for Stripe setup OR skip to page 6 for Payfast setup.

### 1. Stripe setup

After registering your business on theBooking.site, you'll be automatically redirected to the Stripe connect page.

**STEP 1 :** Here you will fill out your mobile number & email address, click **continue**.

theBooking.site  
partners with Stripe for  
secure payments and  
financial services.

Powered by **stripe** ⓘ  
Contact  
English (US) ⓘ

### Get paid by theBooking.site

Fill out a few details so you can start getting paid.

Mobile number

GB ⓘ +44 121 234 5678

We'll text this number to verify your account. In test mode, you can skip this with the [test phone number](#).

Email

samsmith@theozoneco.uk

We'll email you with important updates.

Continue →

A verification number will be sent to the mobile number given above. Enter the number & continue.

**STEP 2 :** Next fill out your business details & continue.

### Business details

Tell us some basics about The Ozone Co.

Companies House Registration Number (CRN)

12345678

We only need your 7 or 8-digit Company Number. Don't have one yet? [Apply online](#).

Registered business address

United Kingdom ⓘ

Address line 1

Address line 2

Town or City

Postal code

This address must match the address filed with the UK tax authorities. [Find your firm's address here](#).

**STEP 3 :** See description below “Business representative” for more info. Fill and continue.

The screenshot shows the 'Business representative' form. On the left is a blue sidebar with the theBooking.site logo and Stripe partnership information. The main content area has a progress bar at the top, followed by the title 'Business representative' and a disclaimer. Below this are input fields for 'Legal name of person' (split into first and last name), 'Email address' (pre-filled with sam.smith@theozoneco.uk), 'Job title' (pre-filled with CFO, Manager, Partner), and 'Date of birth'.

**STEP 4 :** Here you can add all business executives. If it's only you then click “Done, continue”.

The screenshot shows the 'Business executives' form. It includes the same blue sidebar as the previous step. The main content area has a progress bar, the title 'Business executives', and a disclaimer. Below the disclaimer is a section titled 'Please list all business executives from The Ozone Co.' containing a list of one executive (Sam Smith) and a button to 'Add another executive'. At the bottom is a 'Done, continue' button.

**STEP 5 :** Double check that all information is correct & submit.

The screenshot shows the 'Let's review your details' form. It features the same blue sidebar. The main content area has a progress bar, the title 'Let's review your details', and a message asking the user to double-check their information. Below this is a 'BUSINESS DETAILS' section with a box containing the company name 'The Ozone Co', address 'Trafalgar Square, London, WC2N 5DN, United Kingdom', and a field for 'Other information provided' (CRN, DBA, Phone, Industry).

You have now successfully verified your Stripe account. You will be redirected to [theBooking.site](https://theBooking.site)

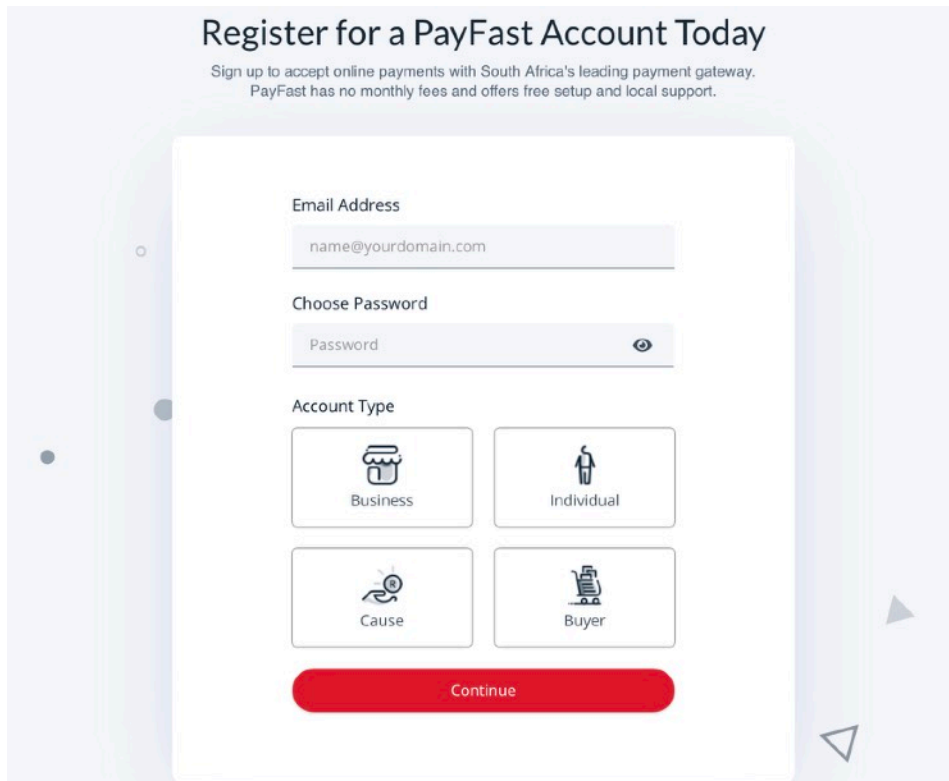
*Your first booking payment might be delayed by up to 7 days as part of Stripe's security measures. Thereafter booking payments on average will reflect within 2 days in your bank account.*

## 2. Payfast setup (For South Africa ONLY)

We require all South African outlets to have a PayFast account in order for us to affect payments to you. Creating a PayFast account is quick & easy and free of charge.

Visit [www.payfast.co.za/registration](http://www.payfast.co.za/registration) to set up your account.

You will have a choice between 4 account options:



The image shows a registration form titled "Register for a PayFast Account Today". Below the title is a sub-header: "Sign up to accept online payments with South Africa's leading payment gateway. PayFast has no monthly fees and offers free setup and local support." The form contains the following fields and options:

- Email Address:** A text input field with the placeholder "name@yourdomain.com".
- Choose Password:** A text input field with the placeholder "Password" and an eye icon to toggle visibility.
- Account Type:** Four selectable options, each with an icon and a label:
  - Business:** Icon of a storefront.
  - Individual:** Icon of a person.
  - Cause:** Icon of a hand holding a coin.
  - Buyer:** Icon of a shopping cart.
- Continue:** A red button at the bottom of the form.

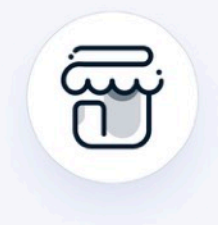
Your account will either be for “Business” or as an “Individual”.

### Business

Grow your business

A Business account is designed for businesses who need to accept money on a very regular basis. This account can use any payment method and the full range of integration methods and features.

Intended for: eCommerce sites, large online traders, businesses accepting large sums of money online, etc.



Register as a Business

## OPTION 1 - Business [ONLY FOR REGISTERED PTY LTD OR CC'S]

## OPTION 2 - Individual [CAN BE UPGRADED TO BUSINESS ACCOUNT AT LATER STAGE]

### Individual

Reach more customers

An Individual account is intended for use by individuals (traders, sole proprietors, etc.) who need to accept money from customers and is able to accept credit card payments. This account can use any payment method and the full range of integration methods and features.

Intended for: Online traders, market stall owners, shops with or without an ecommerce site wanting to accept payments online, etc.



Register as an Individual

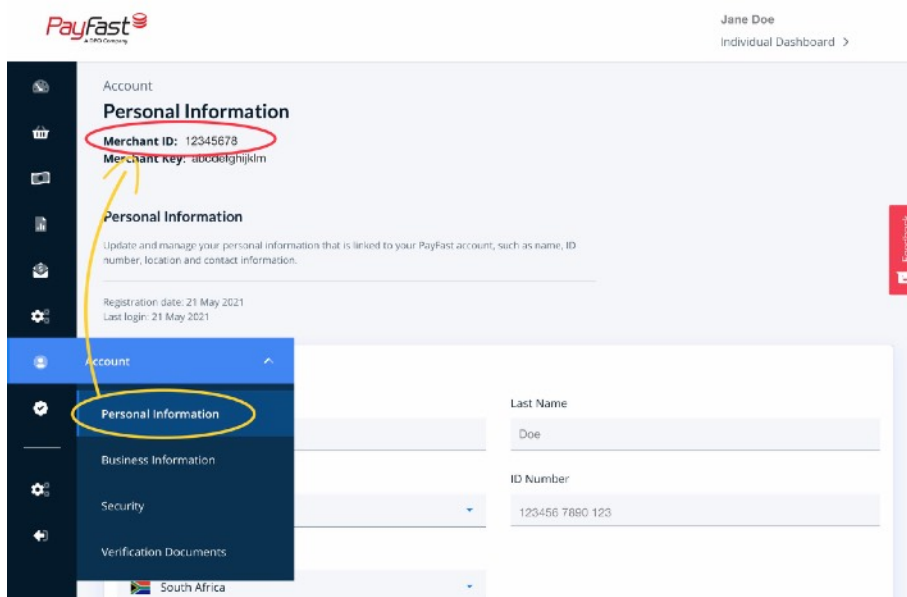
Registrations will only take about 2 minutes.

### Verifying your PayFast account:

To verify your account you will have to submit a list of documents to PayFast. After submitting the documents, PayFast will verify that you are who you say you are.

*Your account will have to be activated by the Team at [thebooking.site](https://thebooking.site) before it will be visible to clients, this may take up to 48 hours. While you wait, log in to your account & continue setting up.*

You can however use your merchant ID in our registration form before verifying your PayFast account. The Merchant ID can be found under Account >> Personal Information >> Top left of page.





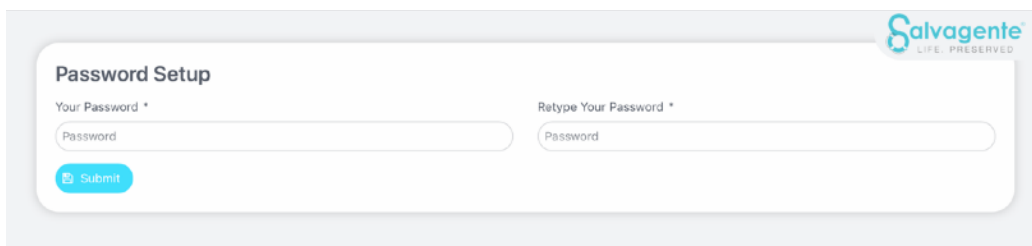
## C. Completing Outlet Registration

After submitting your form on [thebooking.site](https://thebooking.site) you will be sent 2 emails.

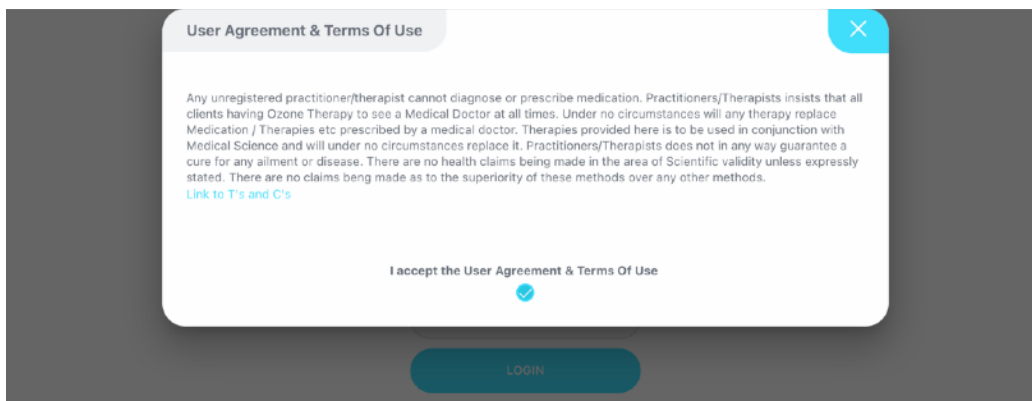
1. User Registration - It is important that you confirm your email address.
2. Welcome email - Welcoming you to [thebooking.site](https://thebooking.site) & some important information & resources to complete your setup.

*If you don't receive it within a few minutes, double check your spam folder.*

When clicking the link “[confirm](#) email” in the User Registration email you will be taken to a page where you can set up your password.

The screenshot shows a 'Password Setup' form. At the top right is the 'Salvagente' logo with the tagline 'LIFE. PRESERVED'. The form has two input fields: 'Your Password \*' and 'Retype Your Password \*', both labeled 'Password'. Below the first field is a blue 'Submit' button with a lock icon.

The below bubble will pop up, please read it through and accept at the bottom.

The screenshot shows a modal window titled 'User Agreement & Terms Of Use'. It contains a paragraph of legal text stating that practitioners cannot diagnose or prescribe medication and that their services are not a replacement for medical science. Below the text is a link 'Link to T's and C's'. At the bottom of the modal is a checkbox labeled 'I accept the User Agreement & Terms Of Use' which is checked, and a blue 'LOGIN' button.

It is very important that you take your time with the next steps. Setting up your account correctly the first time will save you a lot of time and will reduce any confusion long term.

You will only do this process once, where after you can edit and add as you wish.



## D. Setting Up an Outlet

### STEP 1 - Log In

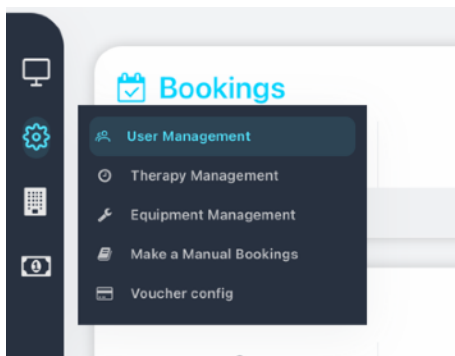
When first logging in you will be directed to the registration form / “Outlet Details” page. Double check that all your information is correct.

Remember to keep this page up to date

Scroll to the bottom of this page and fill out your address & upload your logo.

After submitting, you will be directed to your DASHBOARD. Here you can view your bookings, revenue & calendar.

### STEP 2 - User Management

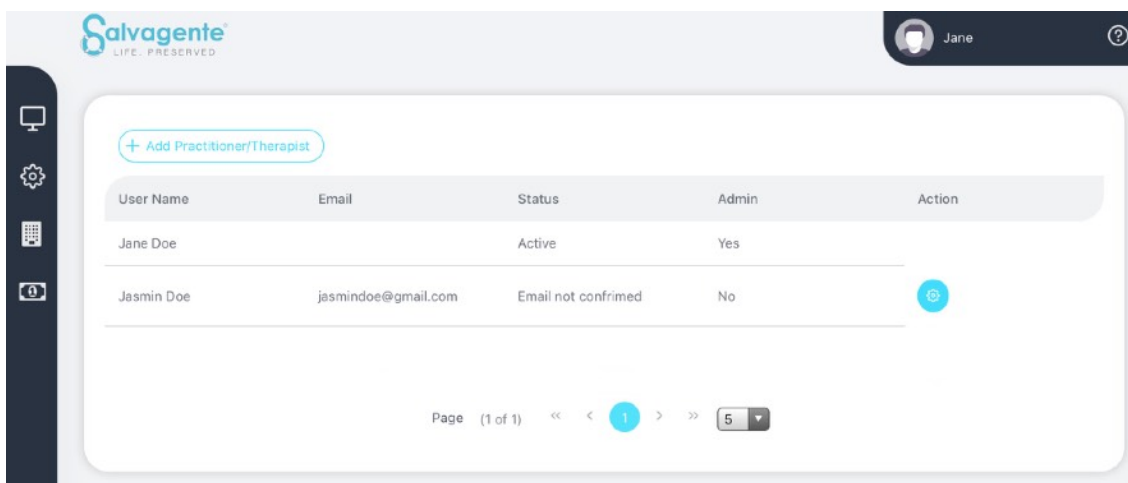


This will be the list of therapists / consultants / masseuses e.t.c. working at your business.

You will automatically be 1st on the list.

If you are the Owner and Therapist, you still have to create a Therapist account for yourself using a DIFFERENT email address. Your Therapist account is important as it is part of your resources and has different functionality when your clients come for treatment.

+ Add Practitioner / therapist



Each practitioner / therapist should use their own email address. This can be their personal company email address or their private email address.

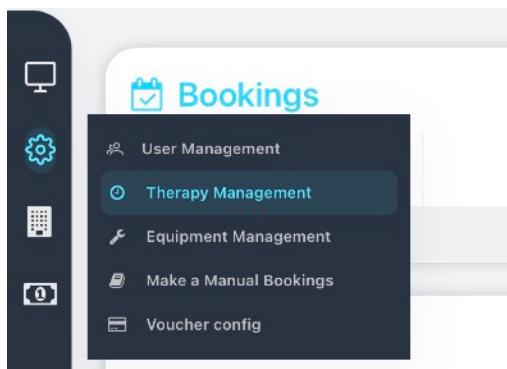
The email address is for notifications & updates on their booked sessions.

You can't use the same email address for multiple therapists.

The practitioner will be sent a confirmation email similar to the one you received.

As soon as they confirm, their status will change to "Active". SEE PAGE 17-21 for Therapist setup

## STEP 3 - Therapy Management



Here you will set up all the therapies / services you offer. You can add as many as you want.

+ Add Service

A screenshot of the 'Add Service' form. It features a sidebar with icons for a monitor, settings, calendar, and a notification bubble. The form has a title bar with a close button (X) and a help button (?). The fields include: 'Therapy Type \*' with a dropdown menu showing 'Ozone' and a '+ Suggest Therapy Type' button; 'Description \*' with a text input field containing '30 minutes ozone'; 'Price \*' with a currency input field; 'Prep Time', 'Session Time', and 'Post Time' each with a '0 min' input field; and a 'Note' section with a large text area and a '600 characters remaining' indicator. At the bottom are 'Submit' and 'Clear' buttons.

Make use of the information bubbles if you are unsure.

**Therapy Type** - is the main category a therapy falls under.

For example; Ozone therapy is the main category of which its sub-categories / descriptions can be:

- 30 minutes ozone - average time for a normal ozone therapy session, in an ozone sauna.
- Bagging
- Cupping
- Ear Insufflation
- Vaginal Insufflation
- Rectal Insufflation

In the event that you can't find the therapy type you're looking; click + Suggest Therapy Type

Suggestions can take up to 48 hours to add.

1. Choose the **therapy type** from the drop down menu.
2. **Descriptions** are custom to each outlet.
3. The **price** cannot be less than R50 / \$20 / 20GBP/ 20AUD etc. This is due to internal pricing structures and merchant processing fees. If you offer free consultations, rather add it on to one of your therapies.
4. **Prep time** is the amount of time you need to set up. For example; most saunas need a few minutes to warm up first, whereas consultations might not need any setup time.
5. **Session time** is the time of your session. For example; most ozone sauna treatments last 30 minutes whereas insufflation might be only a couple of minutes.
6. **Post time** is the time you give your customer to get their things together after which your therapist can clean & put everything where it should be before the next client can be serviced.

NOTE about the time - All booking times on your calendar will include all three of the above times. That way you can be sure that your operation runs smoothly and you will no longer have to work out your own timeframes. The system does that for you.

So if your prep time is 10 minutes, your session is 30 minutes and your post time 10 minutes; a total of 50 minutes will be booked on your calendar.

7. **Notes** are for your own discretion. Here you can list treatment details like products used, things to remember to bring along, things to avoid before coming etc.

If you're happy with the above, click SUBMIT.

REPEAT THE ABOVE PROCESS FOR ALL YOUR THERAPIES

To update / change / delete the service you can click on the gear icon on the right hand side.

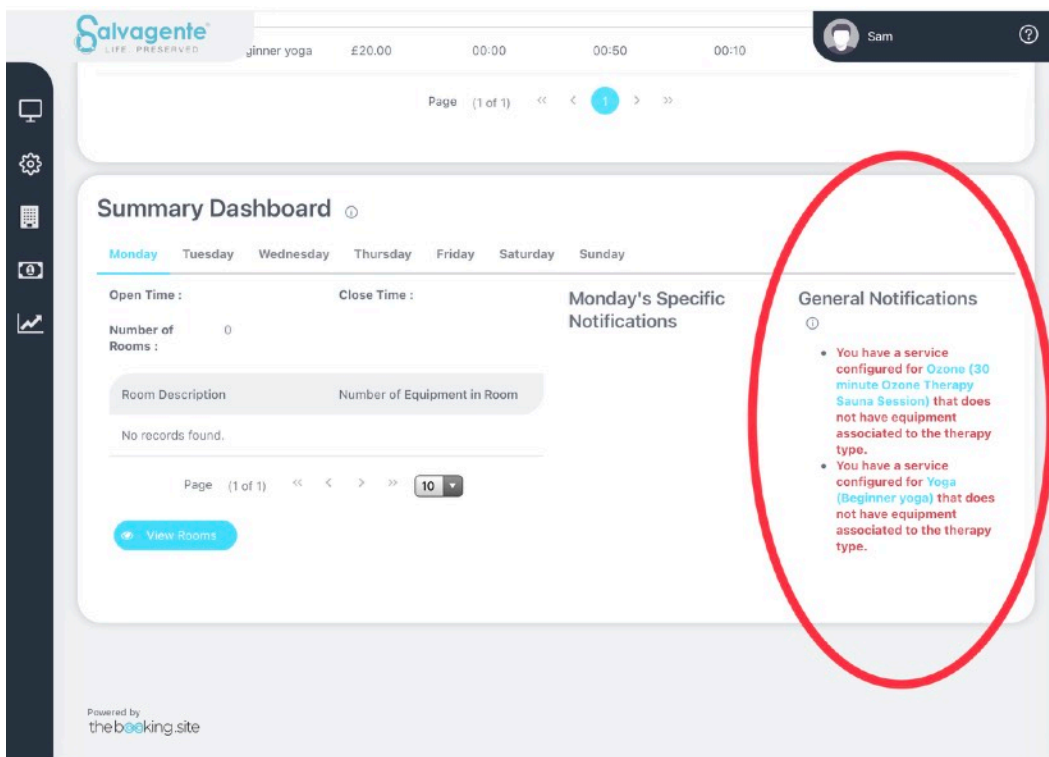
The screenshot shows the Salvagente app interface. At the top, there's a header with the Salvagente logo and a user profile for 'Jane'. Below the header, there's a sidebar with icons for a monitor, settings, a calendar, and a location pin. The main content area features a '+ Add Services' button and a search bar. A table lists services with columns: Therapy Type, Description, Price, Prep Time, Session Time, Post Time, and Total time. The first row shows 'Ozone' with a description '30 minute ozone', price 'R50.00', prep time '00:05', session time '00:30', post time '00:10', and total time '00:45'. To the right of the table, there's a gear icon. Below the table, there's a pagination bar showing 'Page (1 of 1)' and navigation arrows. An 'Actions' menu is open, showing 'Update' and 'Delete' options.

Therapy Type	Description	Price	Prep Time	Session Time	Post Time	Total time
Ozone	30 minute ozone	R50.00	00:05	00:30	00:10	00:45

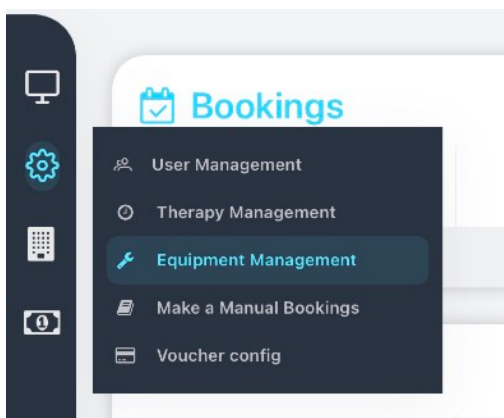
There are Summary Dashboards under the Therapy- and Equipment management boxes. The Summary Dashboard is a quick overview of your business setup. It will indicate all the key information you added, so go through it after you have completed setting up to make sure all information is correct. You will be able to drill down for each day of the week to view available rooms for that day, which equipment is located in each room and which therapist(s) are handling that equipment.

While you are setting up, the Summary dashboard will show text in red and blue on the right. This means that there are still information you need to add. After completing all the steps in this manual, this section should be clear. If you missed anything in your setup that might prevent your operation from running smoothly, it will still display under General Notifications. Follow the instructions to resolve the issues. There should never be any red notifications in this section.

To add rooms & equipment, either click on the blue text as shown in the pic below or continue as per STEP 4.



## STEP 4 - Equipment Management



In this section you will be adding rooms and equipment. If one room is divided into two by use of a divider. Set up each section as a room of itself.

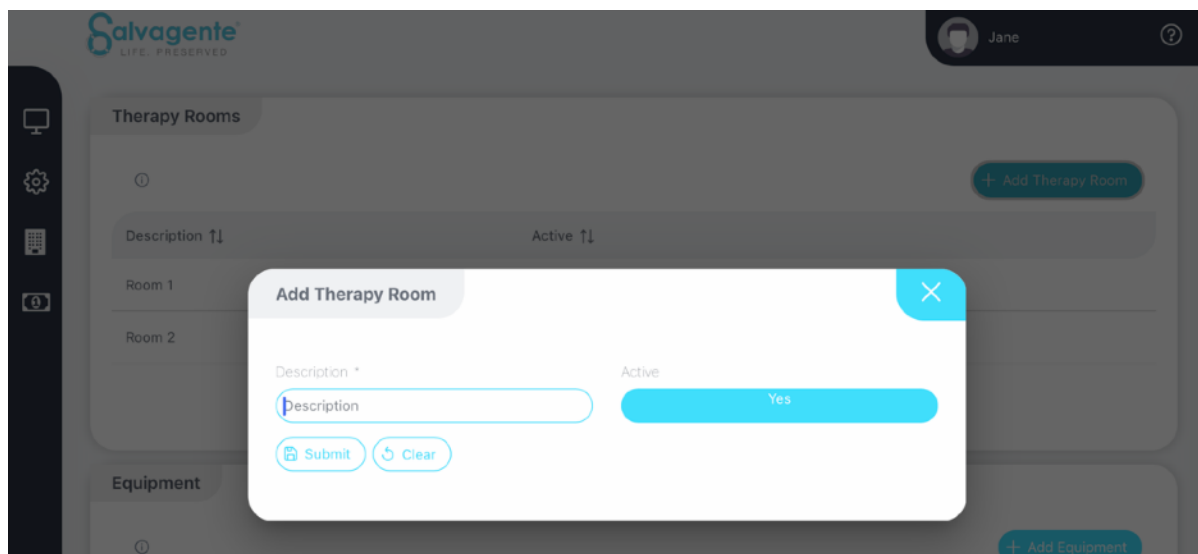
If there are multiple pieces of equipment in one room without any dividers, whichever equipment is booked first will book out the room for that timeframe.

For example if there is an ozone sauna & massage table in the same room without a divider and a customer books a 60 minute massage, the sauna will not be available until after the massage session.

Make sure to place popular equipment in their own rooms and less popular and shorter duration treatments in another.

If there are no Therapist(s) available associated with therapy types and/or equipment, rooms and/or equipment will be unavailable to book. For example, if the same Therapist handles both ozone and massages, even if they are in different rooms, once the therapist is booked, for example for massage, the other room with ozone will be unavailable to book.

+ Add Therapy Room



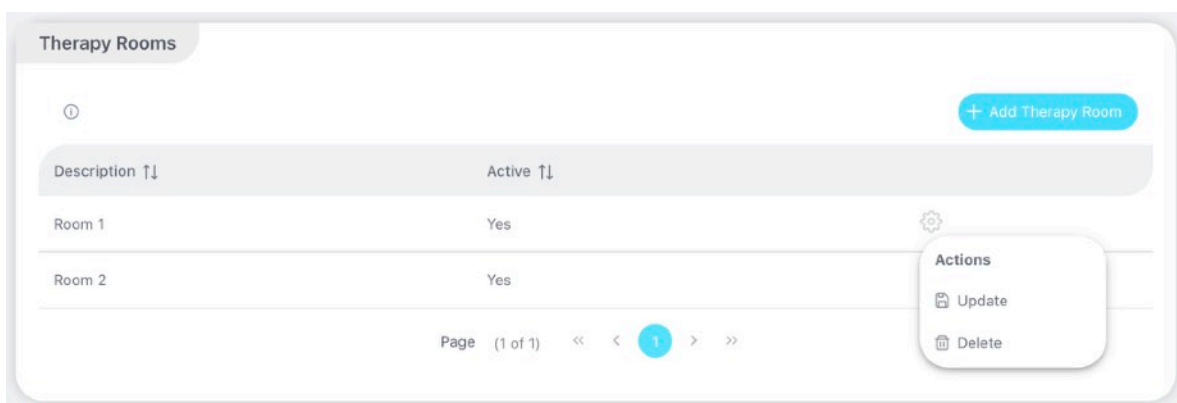
The **description** is the room name eg. Room 1

8. The room must be **active** to use it. If however there are renovations or the room will not be available for a short period of time, you can change this setting to “No”.

## 9. Submit

Editing rooms:

To edit rooms, click on the gear icon on the far right.



## + Add Equipment

**Add Equipment**

Description \* ⓘ

Therapy Type \*

Room

Active ☐ Yes ☐

1. **Description** is the name of the equipment. For example; if you have 2 saunas you will name them Sauna 1 & Sauna 2.
2. Choose the **therapy type** that goes with the equipment, Massages for massage beds, Ozone therapy for ozone saunas etc.
3. Choose the **room the equipment is located in**.
4. Make sure the equipment is **active**.
5. **Submit**.

### Editing equipment:

To edit your equipment, click on the gear icon on the far right.

Description ↑↓	Therapy Type ↑↓	Room ↑↓	Active ↑↓	
Sauna 1	Ozone	Room 1	Yes	+ Manage Availability
Massage Bed 1	Massage	Room 1	Yes	+
Sauna 2	Ozone	Room 2	Yes	+

Page (1 of 1) << < 1 > >>

## STEP 5 - Manage Availability

Next you must set up when equipment will be available, skipping this step will show there is nothing to book. You will have to set this up for each and every piece of equipment. You will only have to do this once, unless you want to make changes in future.

Equipment

1

+ Add Equipment

Description ↑↓	Therapy Type ↑↓	Room ↑↓	Active ↑↓	
Sauna 1	Ozone	Room 1	Yes	<div>+ Manage Availability</div>
Massage Bed 1	Massage	Room 1	Yes	<div>+ Manage Availability</div>
Sauna 2	Ozone	Room 2	Yes	<div>+ Manage Availability</div>

Page (1 of 1) << < 1 > >>

Click on the “Manage Availability” on the right.  
Set which **days** you want your times to apply to.

Manage Equipment Availability

Input Type \*

- Day by day
- Monday to Friday
- Monday to Saturday

	Available To
Monday 08:00 - 17:00	
Tuesday 08:00 - 17:00	
Wednesday 08:00 - 17:00	
Thursday 08:00 - 17:00	
Friday 08:00 - 17:00	
Saturday 08:00 - 17:00	

Page (1 of 1) << < 1 > >>

Set the **times**, then submit.

Manage Equipment Availability

Input Type \*

- Day by day
- Monday to Friday
- Monday to Saturday

Hours	Minutes	Available To
00 01 02 03 04 05 06 07 08 09 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59		17:00
Wednesday 08:00 - 17:00		
Thursday 08:00 - 17:00		
Friday 08:00 - 17:00		
Saturday 08:00 - 17:00		

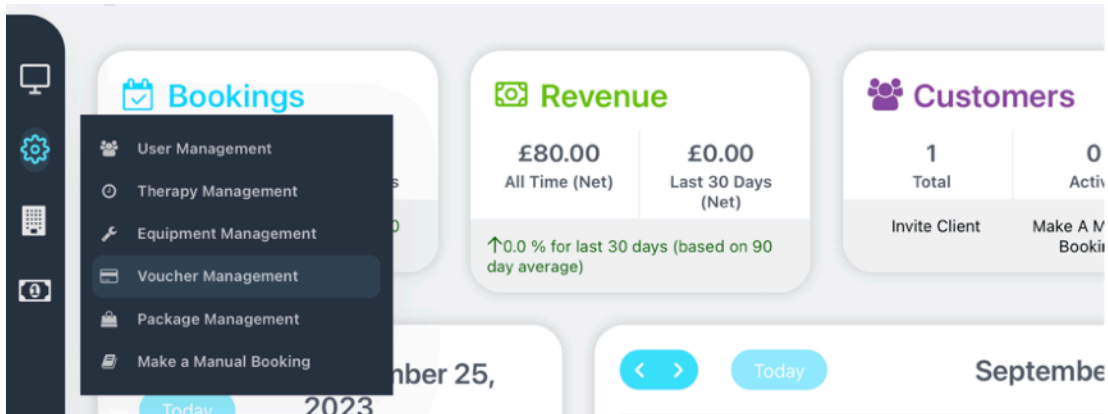
Page (1 of 1) << < 1 > >>



## STEP 6 - Voucher Management [OPTIONAL]

The voucher functionality is useful when you are selling packages of a specific therapy type, like 10 ozone sauna sessions, or monthly consultations at special or discounted rates. These can be valid over a period of time, and Clients will have the ability to choose between a normal payment or using one of their voucher sessions when booking. You will receive the full voucher value upfront when the client buys a voucher.

On the left tab, go to **Voucher Management**.



Click Add Voucher and fill out all the details & submit.

**+ Add Voucher**

Add Voucher

Valid From Date \*

Valid To Date \*

Valid Period Months \*

Number Of Sessions \*

Price \*

Therapy Options \*

Note

500 characters remaining.

Submit Clear

A list of all your available vouchers will be show below. To edit, click on the gear icon.

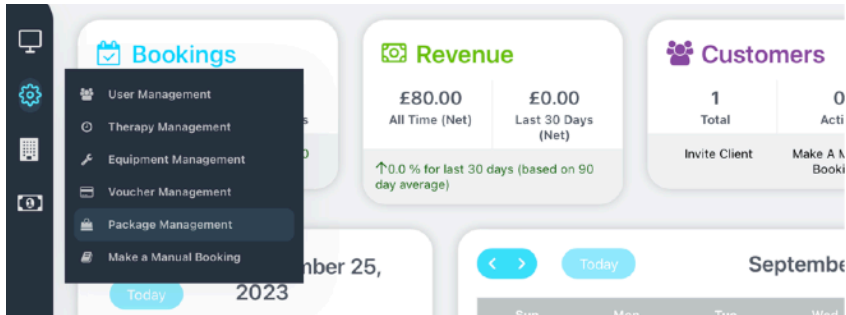
The screenshot shows the Salvagente dashboard with a list of vouchers. The table has columns for Id, Valid Form Date, Valid To Date, Number Of Sessions, Price, Equipment, Note, and Valid Period Months. There is one voucher listed with Id 1, Valid Form Date 01-Jun-2021, Valid To Date 01-Jun-2022, Number Of Sessions 10, Price R2,500.00, Equipment 30 minute ozone, Note Note about this voucher., and Valid Period Months 12. A gear icon is visible next to the voucher, indicating it can be edited. The page number (1 of 1) and navigation arrows are shown at the bottom of the table.

Id	Valid Form Date	Valid To Date	Number Of Sessions	Price	Equipment	Note	Valid Period Months
1	01-Jun-2021	01-Jun-2022	10	R2,500.00	30 minute ozone	Note about this voucher.	12

## STEP 7 - Package Management [OPTIONAL]

Packages are unique functionality in a couple of ways. First, it doesn't follow our built in validations to see if equipment or rooms are available, giving you optimal flexibility when a person books packages. Secondly, packages are great for a variety of use cases, such as spa days with numerous DIFFERENT therapies or when free sessions are combined with paid services, like a free introductory or follow up consultation that goes with your therapy. You receive the full package value upfront when purchased.

On the left tab, go to **Package Management**.



Click Add Package and fill out all the details & submit.

**+ Add Package**

**Add Package**

Package Type \* ☐ Specific ☐ Non Specific

Valid From Date \*

Valid Period (Months) \*

Therapy Options

Description \*

Valid To Date \*

Price \*

Note

900 characters remaining.

### IMPORTANT:

1. All therapies in Specific Packages will be used AT THE SAME TIME, like a Spa day.
2. Therapies in Non Specific Packages can be booked individually over a period of time, like a FREE follow up consultation or a buy one massage get one haircut free.
3. Only Therapies/Services already created in STEP 3 will be available to select.
4. You will be prompted to approve a DATE/TIME when a customer books a SPECIFIC package

A list of all your available packages will be shown below. To edit, click on the gear icon.

Valid From Date	Valid To Date	Description	Price	Package Type	Total time (Hours)	Valid Period (Months)	Service - Number of Sessions
26-Sep-2023	24-Oct-2028	Stretch and relax	£300.00	Specific	03:30	5	• 30 minute Orone Therapy Sauna Session x 1 • Beginner yoga x 1

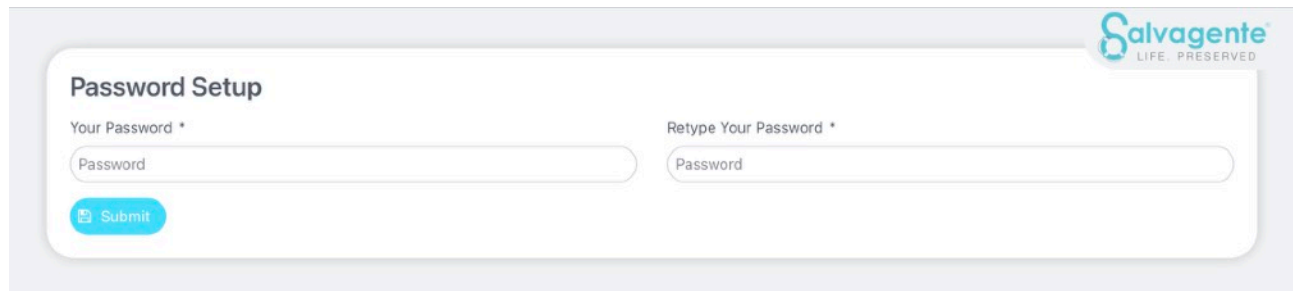
END. You have now successfully set up your account.

# MANAGING THERAPISTS

## A. Registering a Therapist

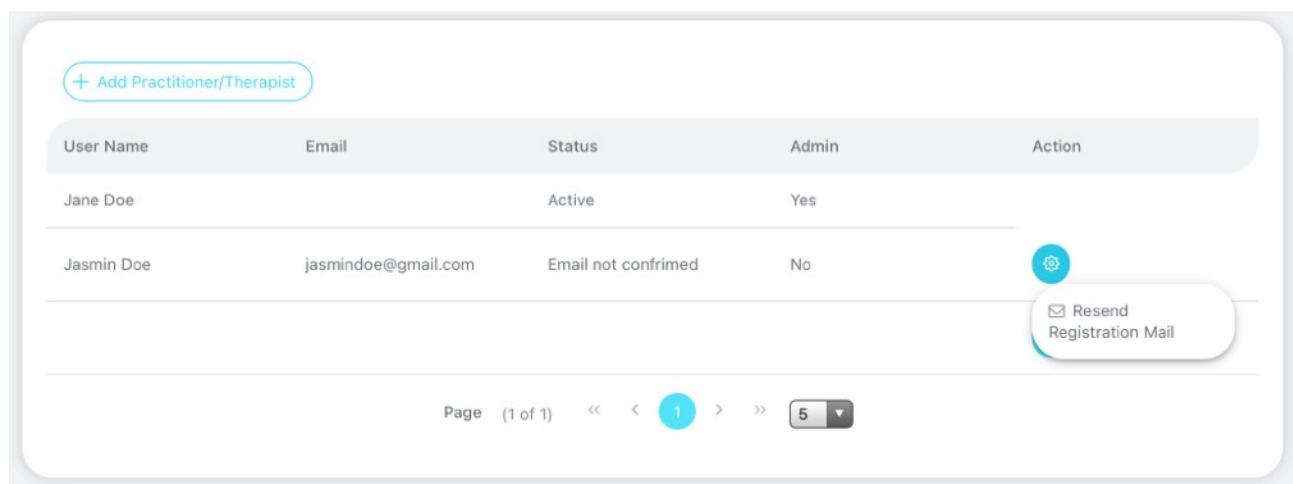
After the outlet has added you as a therapist on their side, you will receive an email to confirm your email address.

After clicking on the link you will be redirected to a new page where you can setup your password.

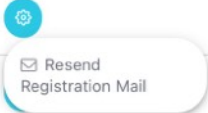


The image shows a 'Password Setup' form with the Salvagente logo in the top right corner. The form has two input fields: 'Your Password \*' and 'Retype Your Password \*'. Both fields contain the placeholder text 'Password'. Below the first field is a blue 'Submit' button with a checkmark icon.

If you did not receive the email, double check your spam folder. Then make sure the email address your employer added is correct, then they can click on "Resend".

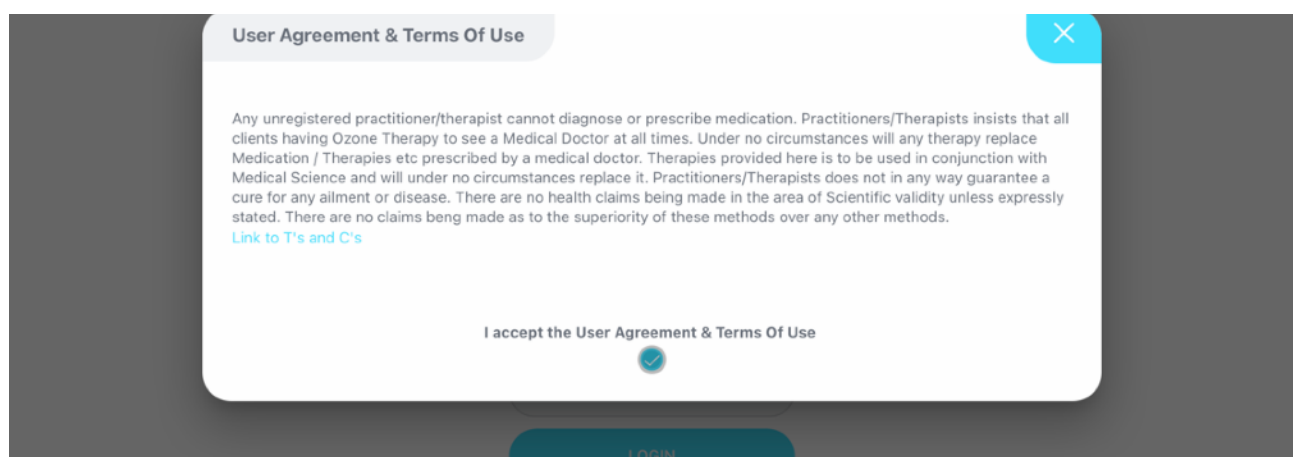


The image shows a 'Therapist Management' interface. At the top is a button '+ Add Practitioner/Therapist'. Below it is a table with columns: User Name, Email, Status, Admin, and Action.

User Name	Email	Status	Admin	Action
Jane Doe		Active	Yes	
Jasmin Doe	jasmindoe@gmail.com	Email not confirmed	No	

At the bottom, there is a pagination control showing 'Page (1 of 1)' and a set of navigation arrows with the number '1' highlighted. To the right of the table, there is a 'Resend Registration Mail' button.

Read through & accept our user agreement.



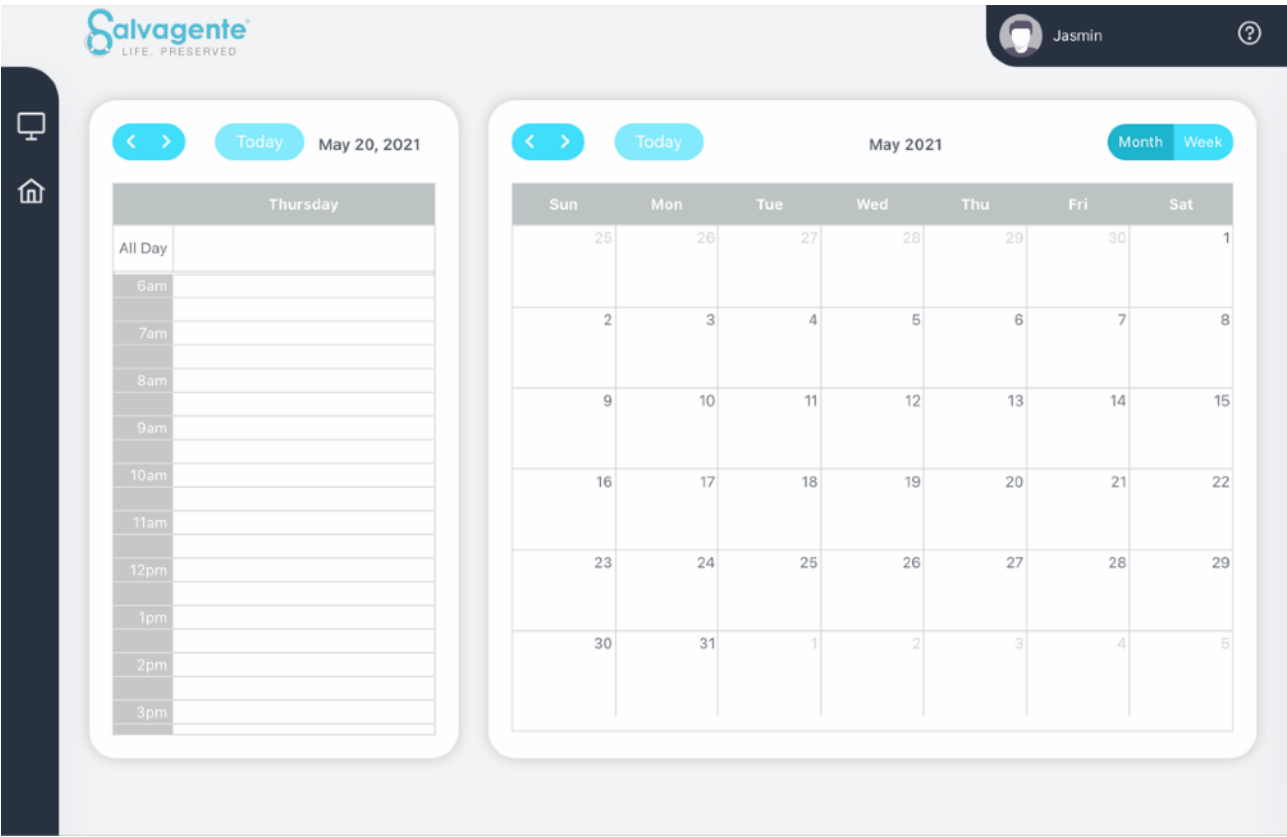
The image shows a 'User Agreement & Terms Of Use' modal. It contains the following text:

Any unregistered practitioner/therapist cannot diagnose or prescribe medication. Practitioners/Therapists insists that all clients having Ozone Therapy to see a Medical Doctor at all times. Under no circumstances will any therapy replace Medication / Therapies etc prescribed by a medical doctor. Therapies provided here is to be used in conjunction with Medical Science and will under no circumstances replace it. Practitioners/Therapists does not in any way guarantee a cure for any ailment or disease. There are no health claims being made in the area of Scientific validity unless expressly stated. There are no claims being made as to the superiority of these methods over any other methods.

[Link to T's and C's](#)

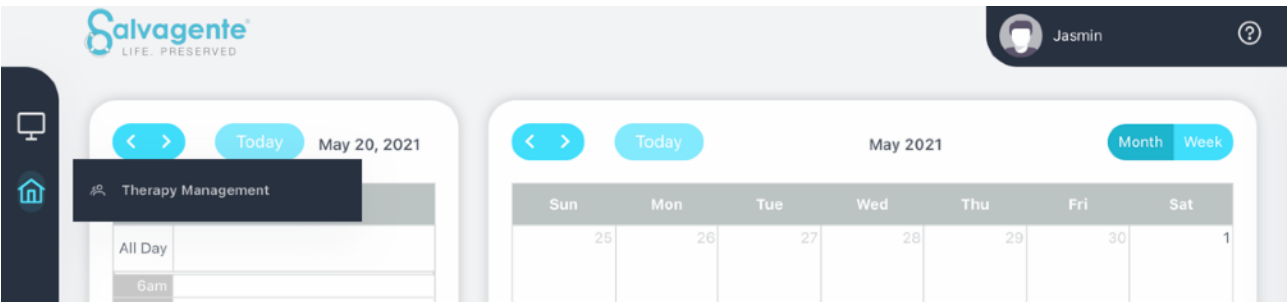
At the bottom, there is a checkbox labeled 'I accept the User Agreement & Terms Of Use' which is checked, and a 'LOGIN' button.

Next you will be taken to your dashboard. The calendar will only show treatments you are booked for.

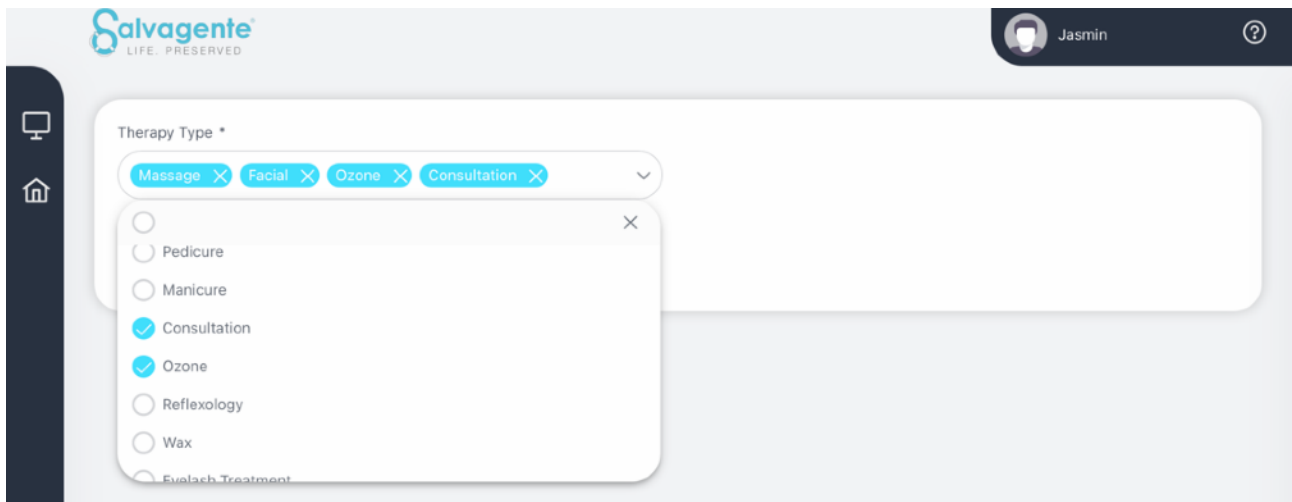


**Setup your treatment options:**

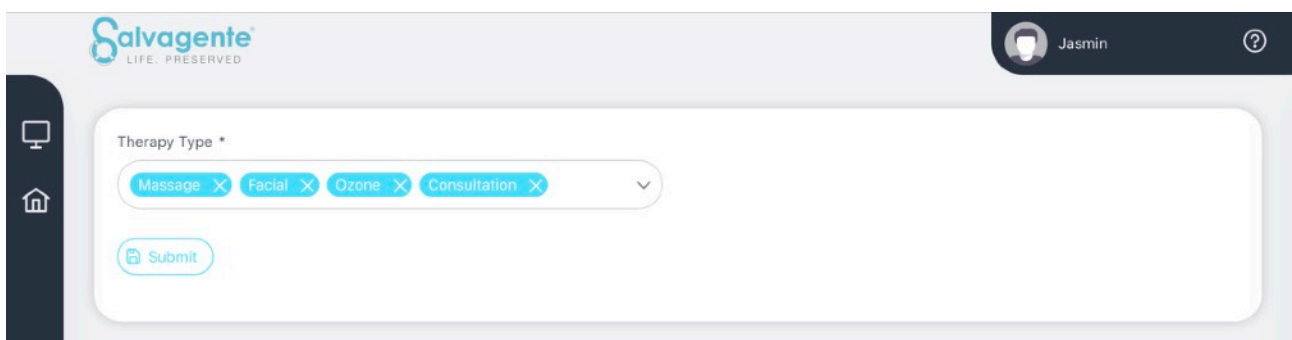
Click on “Therapy Management”



Choose all the “Therapy Types” you can offer to your employer. These can be services they offer as well as services they don’t.



The screenshot shows the 'Therapy Type' selection interface in the Salvagente app. The header includes the Salvagente logo and the user's name 'Jasmin'. The 'Therapy Type' field is a multi-select dropdown. The selected items are 'Massage', 'Facial', 'Ozone', and 'Consultation'. A dropdown menu is open, displaying a list of options with checkboxes: 'Pedicure', 'Manicure', 'Consultation' (checked), 'Ozone' (checked), 'Reflexology', 'Wax', and 'Facial Treatment'.



The screenshot shows the 'Therapy Type' selection interface in the Salvagente app. The header includes the Salvagente logo and the user's name 'Jasmin'. The 'Therapy Type' field is a multi-select dropdown. The selected items are 'Massage', 'Facial', 'Ozone', and 'Consultation'. A 'Submit' button is visible at the bottom of the form.

Click “Submit”

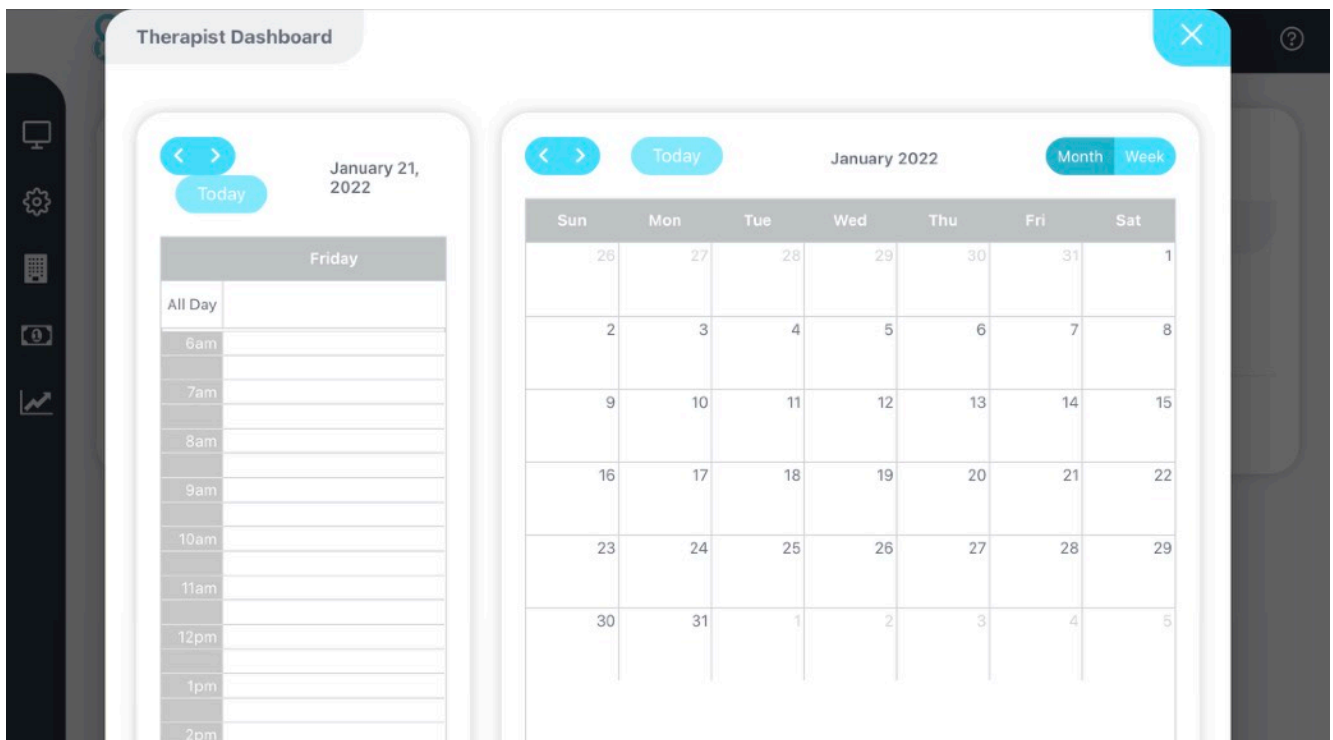
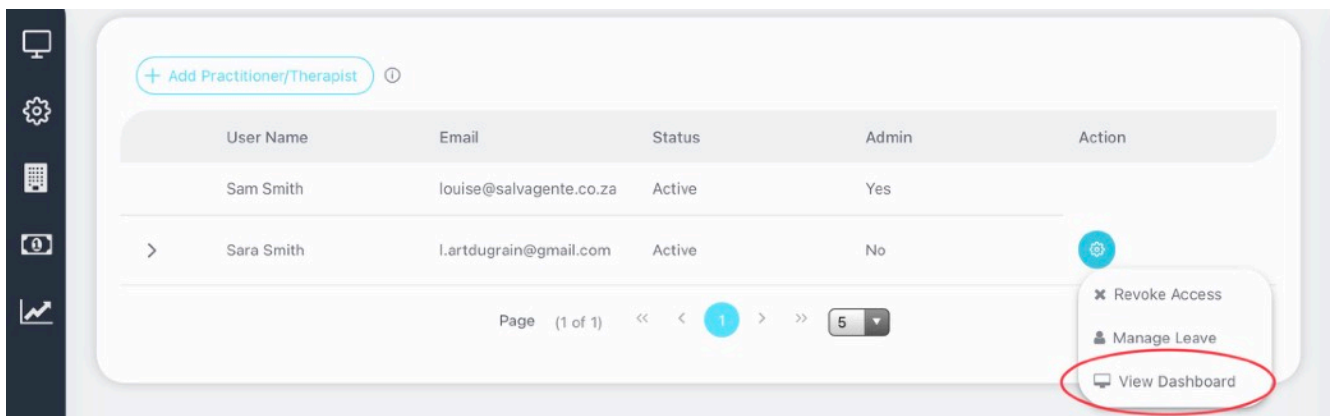
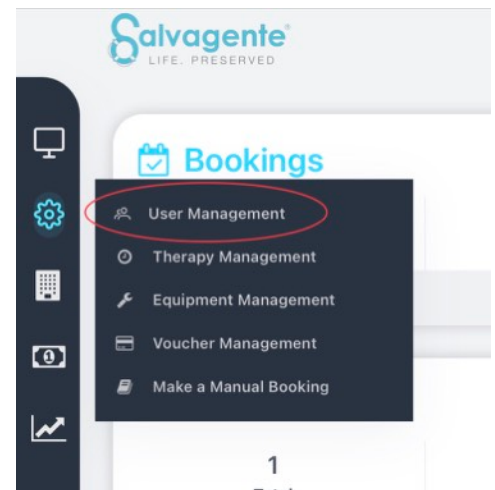
END

You have now successfully setup your account.

## B. Viewing Therapist Dashboard

Outlets have access to all therapist dashboards. Use this to manage client health, check-in info etc when a therapist are not able to. This is also useful for single owner-managed Outlets as you don't have to log into different portals.

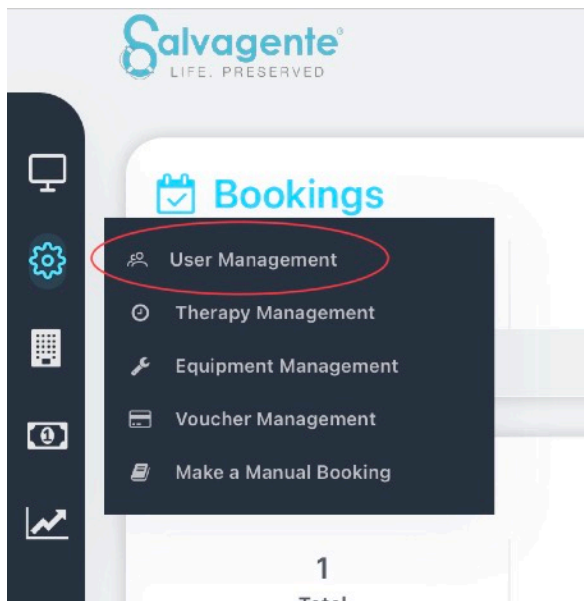
To get to the therapist dashboard click on User Management then click on the Gear icon next to therapist in question.



## C. Therapist leave

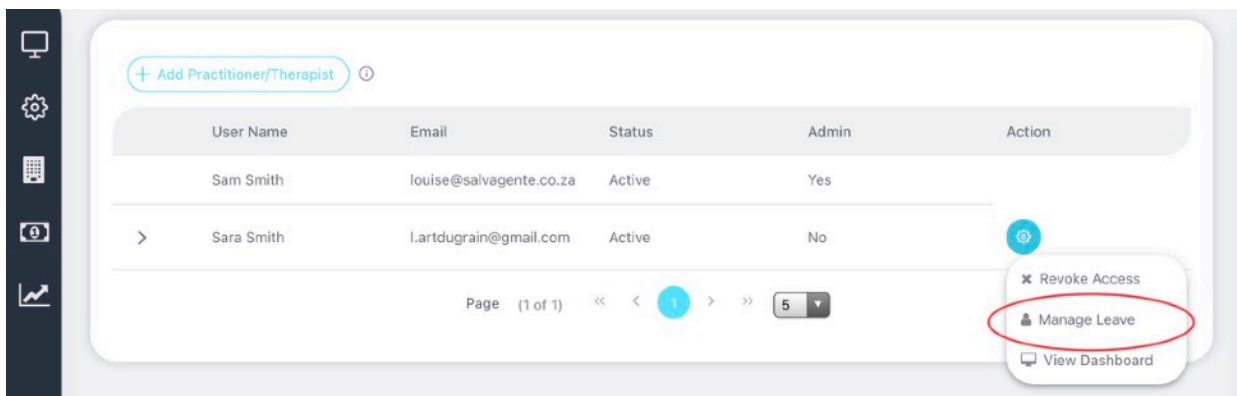
“Manage Therapists leave to ensure they are not bookable online when unavailable.”

To add leave for a therapist, go to User Management.

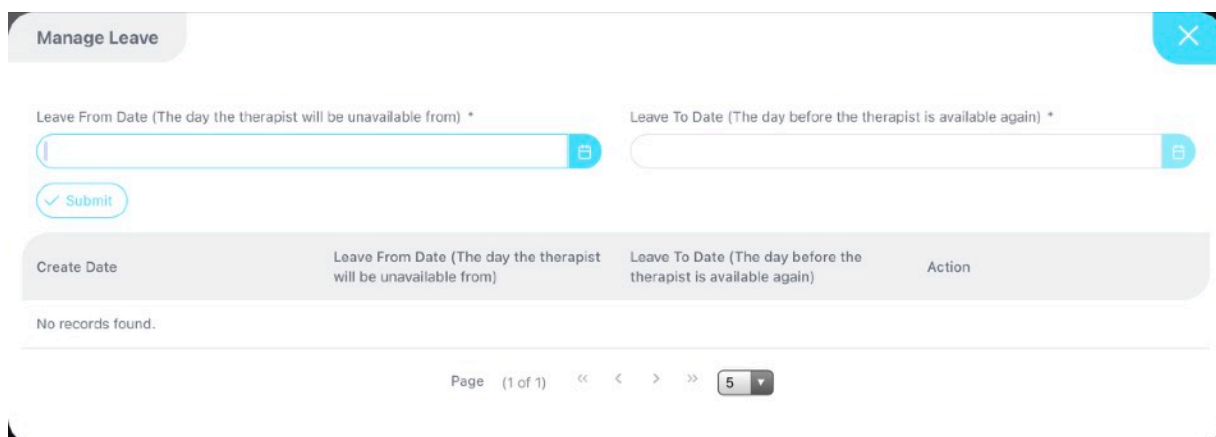


Then click on the Gear next to the therapist in Question & select “Manage Leave”.

Next choose the dates & click Submit. Always double check on the therapist dashboard that leave



has been successfully submitted.



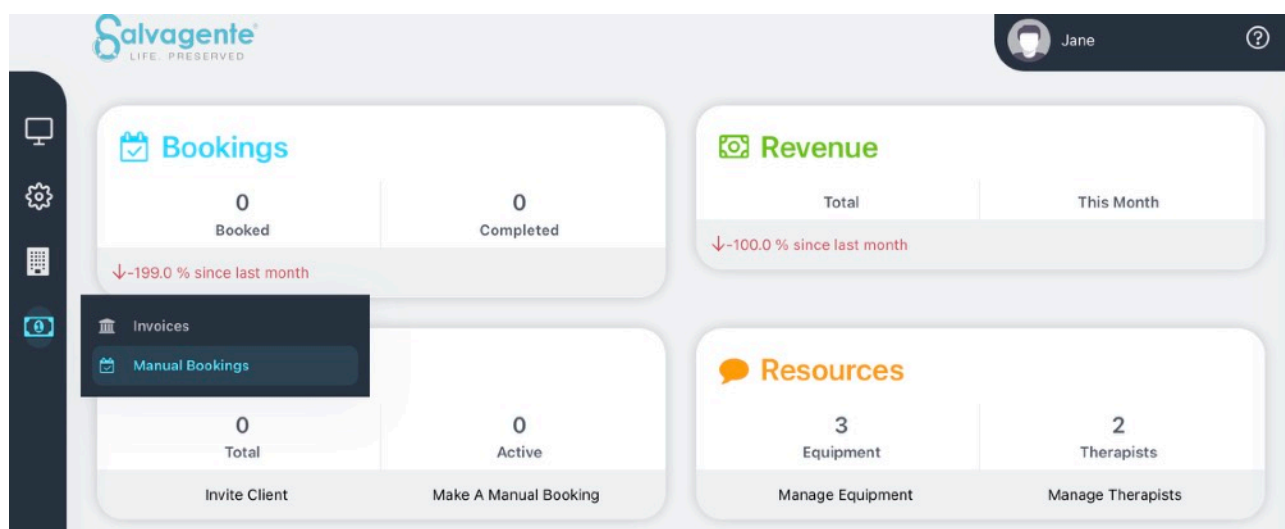


# MANAGING SESSIONS

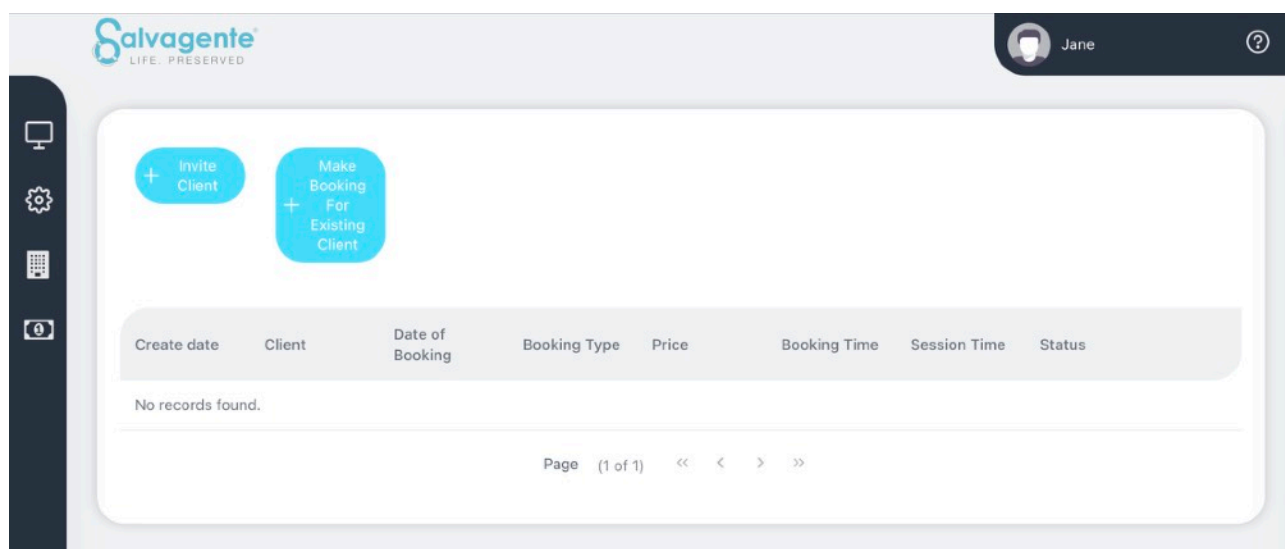
The majority of bookings will be made directly by the customer online, but it is also possible to make manual bookings for existing customers as well as invite new customers via email.

## A. Manual Booking

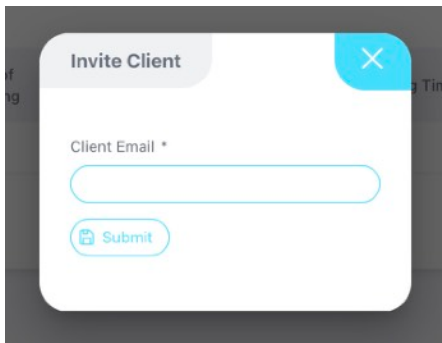
To make a manual booking, click on either the “Make a Manual Booking” on your Customers Dashboard or at the last icon on the left hand panel then “Manual Bookings”.



Here you have 2 options:



## OPTION 1 - Invite Client [IF YOUR CUSTOMER IS NOT REGISTERED YET]



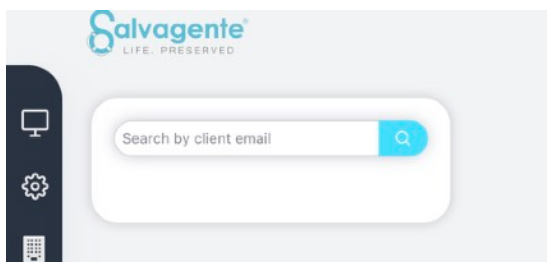
Enter their email address & click submit.

They will receive an invitation email where they will be prompted to register as a customer.

## OPTION 2 - Make a booking for an existing customer

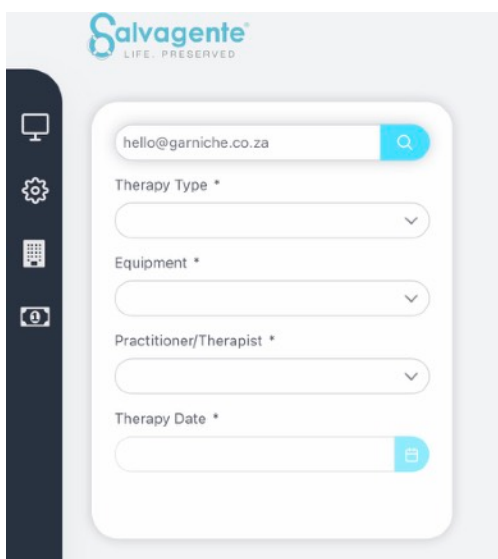
**[NOTE THEY WILL HAVE TO BE BOTH REGISTERED ON THEBOOKING.SITE AND YOU WILL HAVE TO MANUALLY ENTER THEIR EMAIL ADDRESS]**

First search for their email address. If nothing comes up, double check that the email address you've entered is correct.



If the customer still doesn't appear, that means they are not registered on thebooking.site . You will then have to invite them first (Option 1).

If the customer is on the system the following bubble will appear. Fill out all the details and submit.



Your customer will receive a booking confirmation email as well as a request for payment.

The manual booking details will display here with its status.

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Jane

+

Invite Client

+

Make Booking For Existing Client

Create date	Client	Date of Booking	Booking Type	Price	Booking Time	Session Time	Status
25-May-2021	John John	26-May-2021	30 minute ozone	R50.00	11:00	00:30	Not Paid

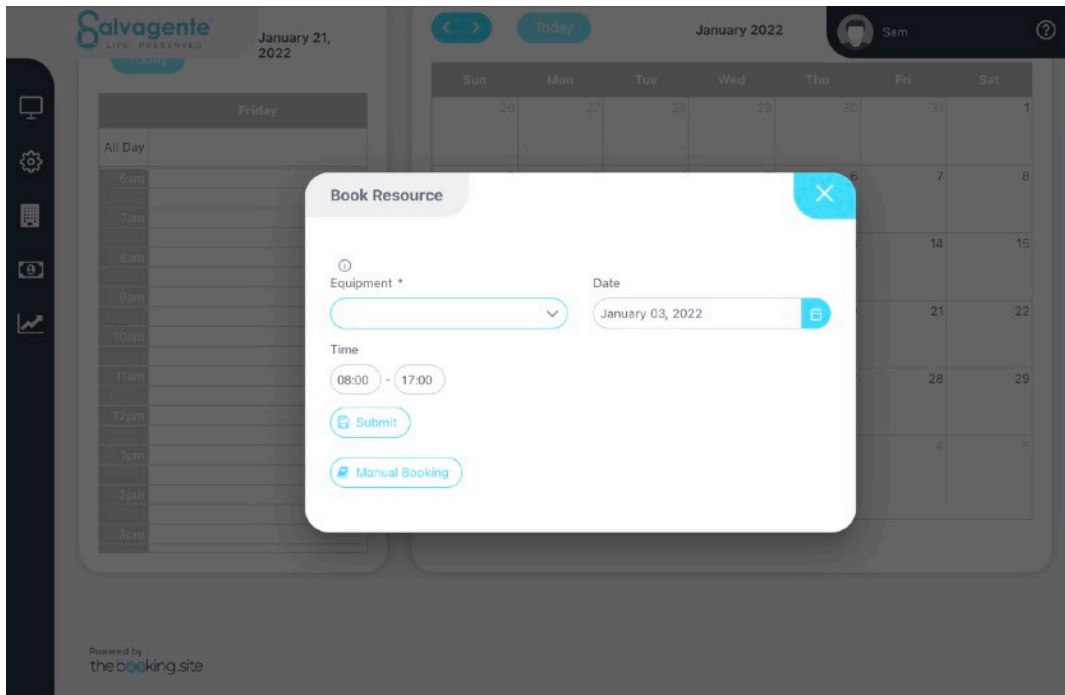
Page (1 of 1) << < 1 > >>

Once the client has confirmed the booking with a payment, it will indicate here as well as show on the Outlet and Therapist calendars.

## B. Booking a Resource

Should equipment be unavailable for some reason (eg maintenance), you can completely block out said equipment for however long you'd like, without having to make changes in "Manage Availability".

To Book a Resource, select the starting date on your Dashboard Calendar and click on any open space.



From the dropdown tab, select the Equipment, then the date and time & Submit.

When resources are booked, customers will not be able to make a booking for that specific equipment until the next available date.

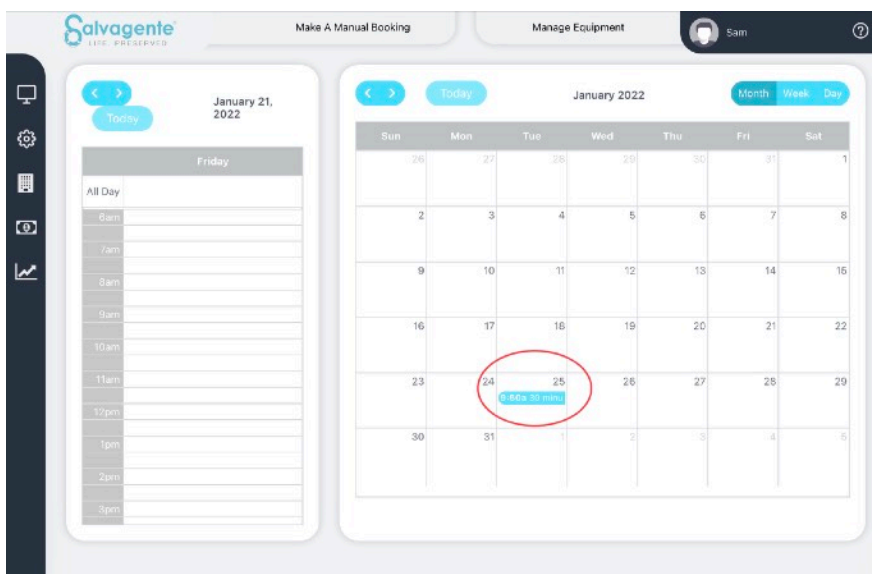
This is a super easy and fast way to quickly book a resource when something unexpected happens.

## C. Managing a Booking

### Change Therapist / Equipment

Changing either or both the therapist / equipment (if applicable) is handy where a therapist calls in sick or equipment breaks down after a booking is already made. This way the session can proceed without being cancelled. The newly selected therapist / equipment will automatically be unavailable to book online for that time slot.

Go to your dashboard and click on the booking you'd like to make changes to.



Here you can make changes to Equipment, Therapist & Therapy options

The screenshot shows a 'Booking Details' form with the following fields and values:

- Client Name: Jack Johnson
- Therapy Type \*: Ozone
- Equipment \*: Ozone Sauna
- Practitioner/Therapist \*: Sara Smith
- Therapy Date \*: January 25, 2022
- Therapy Options \*: 30 minute Ozone Therapy Sauna Session
- Booking Time: 10:00 - 10:30

At the bottom, there are two buttons: 'Submit' and 'Cancel Booking'.

### IMPORTANT! Changing the Booking Date

Follow the steps above to change the date on a booking.

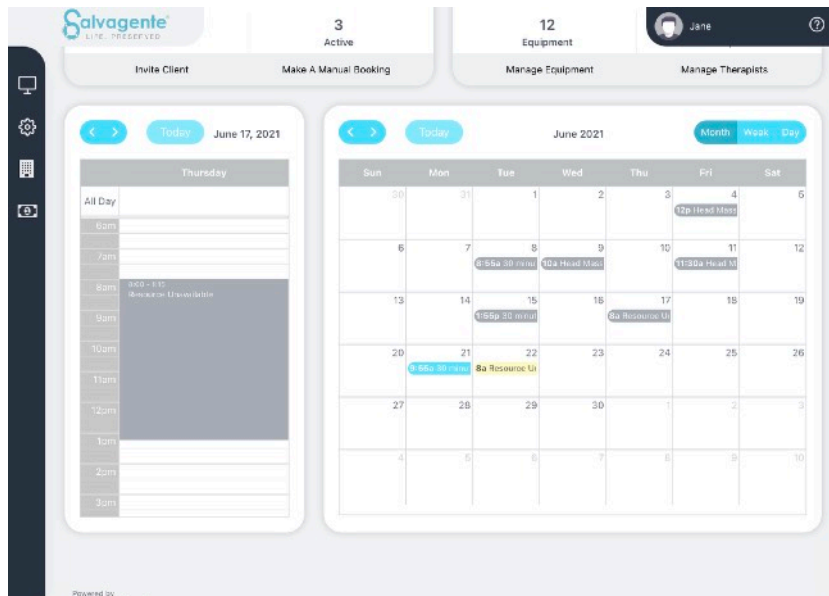
Only Outlets, not Therapists can move a booking. This is to ensure the right resources are allocated. When a booking date/time is changed on the Outlet portal, it will automatically change on the Client and Therapist portals.

Please note the Outlet must double check the availability of resources (equipment, rooms and therapist) when manually moving bookings as this is not automatically checked by the system.

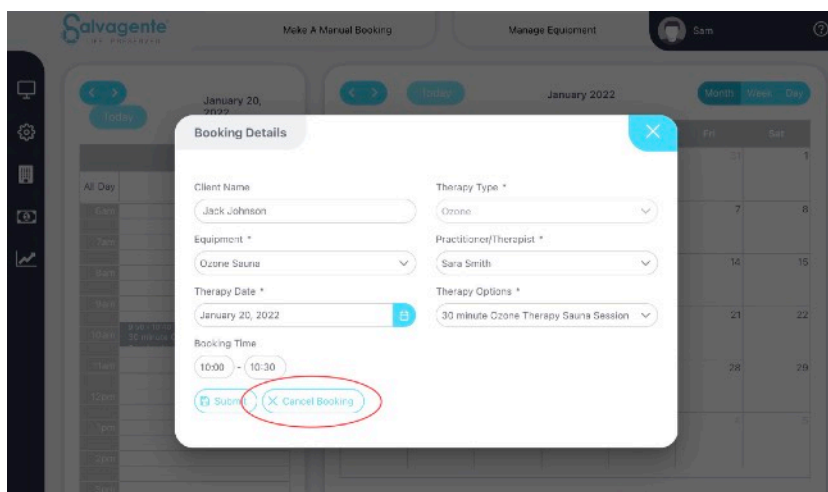
## D. Cancellations & Refunds

To cancel and/or refund a session with a customer simply go to your dashboard calendar & click on the booking you want to cancel/ refund.

**STEP 1** - Go to your dashboard calendar and click on the booking you want to cancel and/or refund.

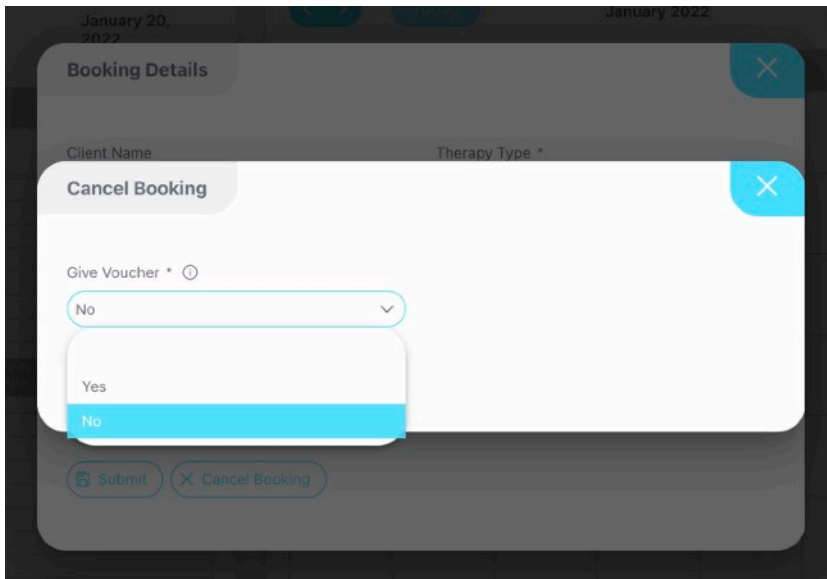


**STEP 2** - A window will pop up with all the details of the booking. At the bottom click "Cancel Booking".



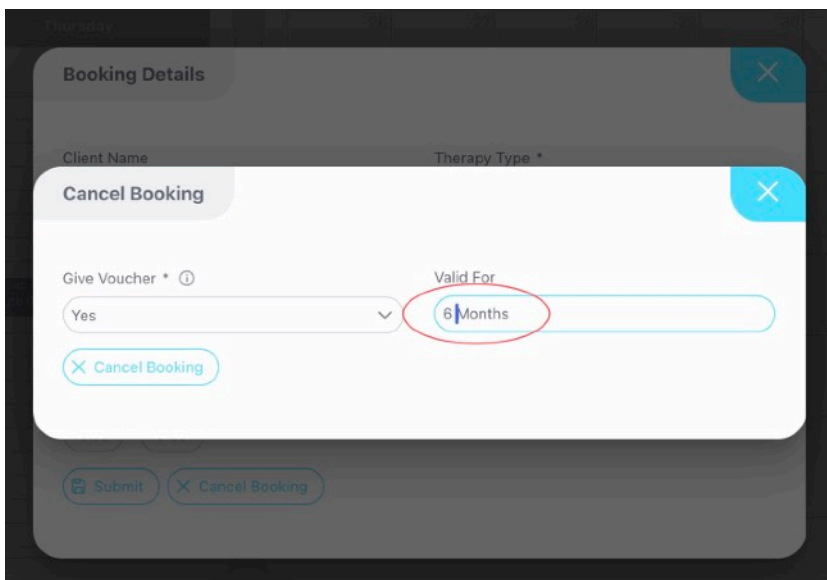


**STEP 3** - Next you'll be able to choose between if you'd like to issue a voucher or not. This step is completely up to you. Please just note if you don't issue a voucher, your client will forfeit their entire booking fee. If you won't be issuing a voucher, skip STEP 4.



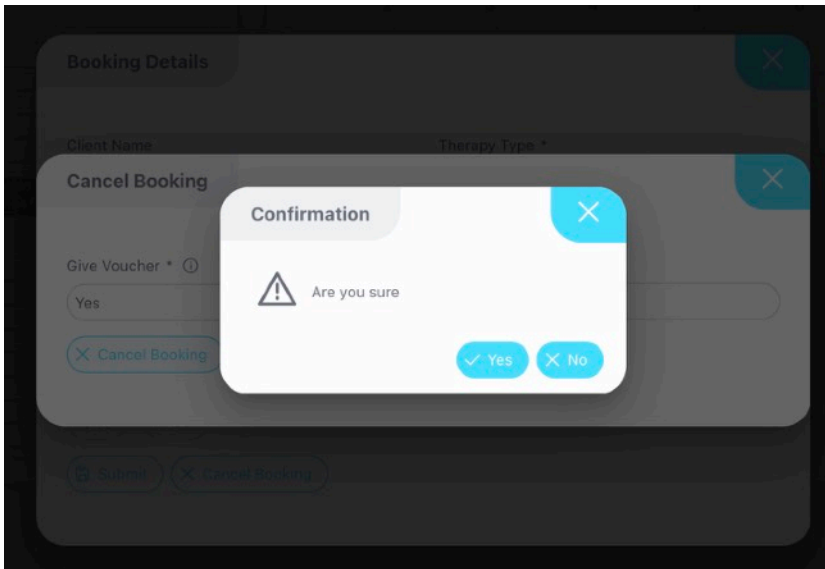
The screenshot shows a 'Cancel Booking' modal window. At the top, there's a header 'Cancel Booking' with a close button (X). Below it, the label 'Give Voucher \*' is followed by a dropdown menu. The dropdown menu is open, showing three options: 'No' (selected), 'Yes', and 'No' (highlighted in blue). At the bottom of the modal, there are two buttons: 'Submit' and 'Cancel Booking'.

**STEP 4** - If you're issuing a voucher, you can choose for how long the voucher will be valid in months.



The screenshot shows the same 'Cancel Booking' modal window, but now the 'Give Voucher' dropdown is set to 'Yes'. A new dropdown menu, labeled 'Valid For', is open next to it. The dropdown menu shows three options: '6 Months' (selected and circled in red), '12 Months', and '18 Months'. At the bottom of the modal, there are two buttons: 'Submit' and 'Cancel Booking'.

**STEP 5** - Lastly confirm that you're sure and you're done. Your customer will automatically be notified of the cancellation via email & if you issued a voucher, their voucher will be available to claim on their dashboard.



To view issued vouchers go to Voucher Management, then Refunds.

Two screenshots of the Salvagente dashboard. The top screenshot shows the main dashboard with a sidebar menu. The 'Voucher Management' option in the sidebar is circled in red. The dashboard includes sections for 'Bookings' (1 Last 30 Days), 'Revenue' (£66.00 All Time (Net), £66.00 Last 30 Days (Net)), and 'Resources'. The bottom screenshot shows the 'Voucher Management' page. It has a table of vouchers and a 'Refunds' section. The 'Refunds' section is circled in red and contains a table of refund records.

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Sam

**Bookings**

- User Management
- Therapy Management
- Equipment Management
- Voucher Management**
- Make a Manual Booking

**Revenue**

£66.00 All Time (Net) | £66.00 Last 30 Days (Net)

↑0.0 % for last 30 days

**Resources**

1 Total | 1 Active | 1 Equipment | 1 Therapist

**+ Add Voucher**

Id	Valid From Date	Valid To Date	Number Of Sessions	Price	Equipment	Note	Valid Period (Months)
10	19-Jan-2022	26-Jan-2022	1	£20.00	30 minute Ozone Therapy Sauna Session	Voucher for first ozone therapy session.	1

Page (1 of 1) << < 1 > >>

**Refunds**

Id	Refund Date	Number Of Sessions	Value	Therapy	Valid Period (Months)	Refunded To	Status
11	20 Jan 2022	1	£40.00	30 minute Ozone Therapy Sauna Session	6	Jack Johnson	Expires :21 Jul 2022

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