



Scheduler

Qaleido Communications V1.7.5

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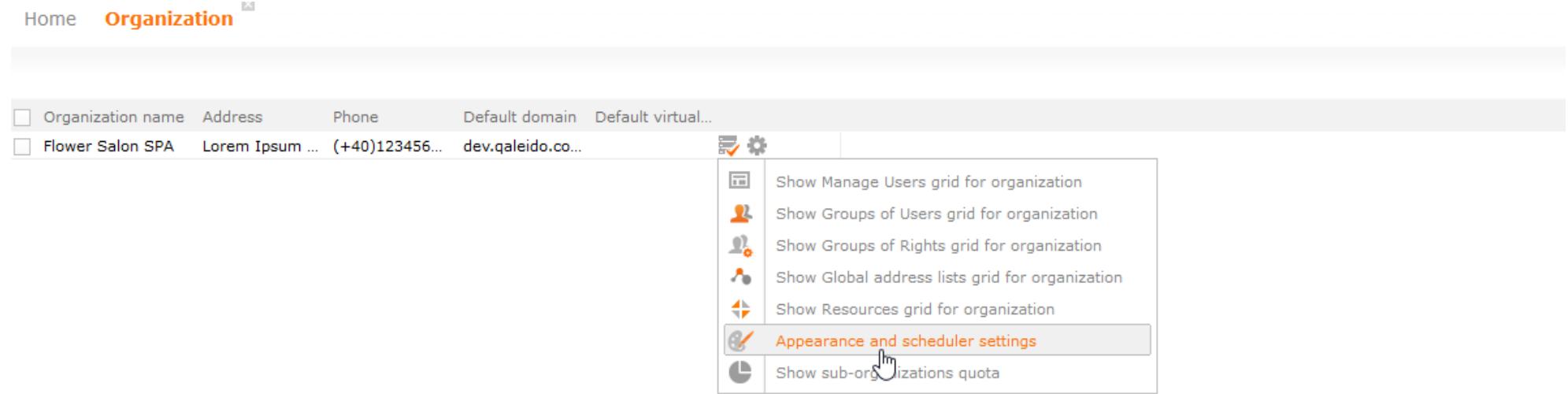
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## Introduction

In this manual we will show to the power user of an organization how to make the settings in the **Administration** panel, in order the **Scheduler** functionalities to be usable.

# Administration

Login in Kaleido Communications as the power user of your organization. Open the **Administration** panel and then the **Organization** tab. In the organization's menu choose the **Appearance and scheduler settings** option.



**Note:** At the first login as new user you will be asked also to set a security question, useful to recover your Kaleido password in case it is forgotten. This is not related to the Scheduler functionalities and can be skipped.

The **Appearance and scheduler settings** will be open in the main screen, the following subtabs being available if your organization has rights on the **Scheduler** functionalities: **General settings for organization**, **Scheduler settings**, **Scheduler categories**, and **Scheduler services**:

HomeOrganizationAppearance and schedul...

General settings for organizationScheduler settingsScheduler categoriesScheduler services

Images

Logo:

max 180px

max 50px

Main logo:Browse

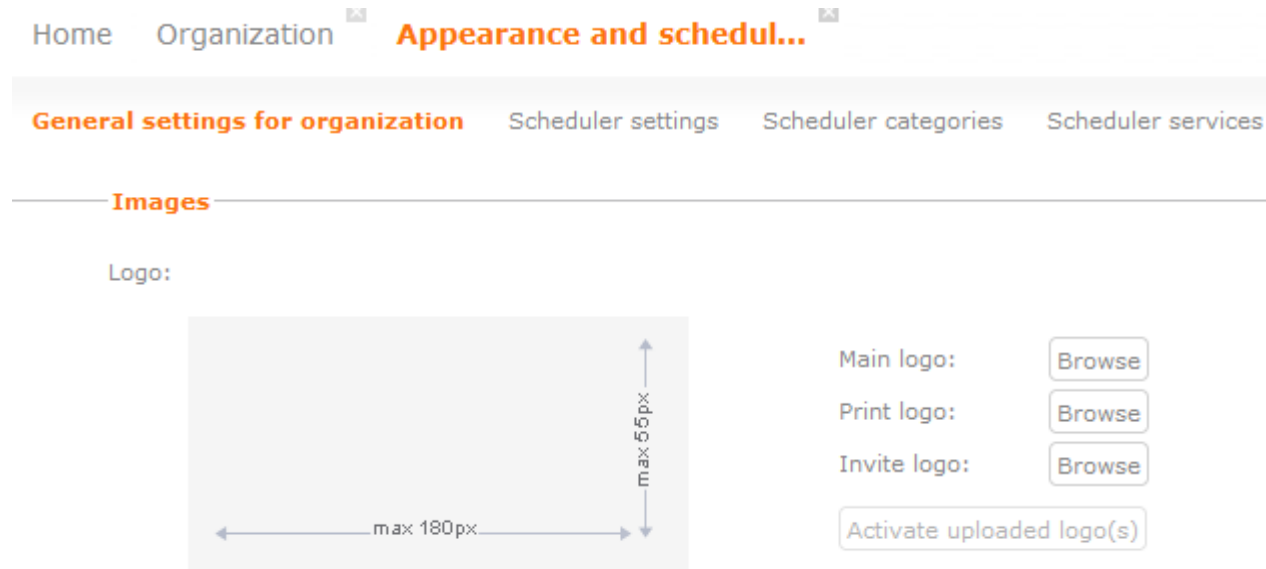
Print logo:Browse

Invite logo:Browse

Activate uploaded logo(s)

## General settings for organization tab

The **General settings for organization** subtab is activated by default when open the **Appearance and scheduler settings** tab.



Home Organization **Appearance and schedul...**

**General settings for organization** Scheduler settings Scheduler categories Scheduler services

---

**Images**

Logo:

max 180px

max 150px

Main logo:

Print logo:

Invite logo:

The **Images** section is the place where you are allowed to upload images as logo(s) for your organization.

**Note:** Only **.png** files can be used as the organization logo(s).

Subject	Description
---------	-------------

Main logo

You can upload an image as the main logo of your organization.


Press the **Browse** button at the right side of the **Main logo** label, select a photo and press the **Open** button, the uploaded image being displayed in the preview, at the left side:

**General settings for organization** Scheduler settings Scheduler categories Scheduler services

---

**Images**

Logo:




Main logo:  logo\_png\_blue\_spa.png

Print logo:

Invite logo:

**Note:** Press the **Activate uploaded logo(s)** button in order to activate the uploaded image as logo. As soon as it is activated, the new logo will become visible at the top left side of the Qaleido screen, after logout and login again:




**webmail**





The main logo will be also visible in the **Organization/ Appearance and scheduler settings/ Scheduler settings** tab/ **Banner image** section, and propagated also in the web form:

**Scheduler wizard banner settings**

Banner color:

Banner image:



Subject	Description
Print logo	<p>You can upload an image as the print logo of your organization.</p> <p>Press the <b>Browse</b> button at the right side of the <b>Print logo</b> label, select a photo and press the <b>Open</b> button.</p> <p><b>Note:</b> The print logo is not mandatory to be uploaded for scheduler. It is the logo used only for the printed e-mails in Qaleido:</p> <p><b>Images</b></p> <p>Logo:</p>  
Invite logo	<p>You can upload an image as the invite logo of your organization.</p> <p>Press the <b>Browse</b> button at the right side of the <b>Invite logo</b> label, select a photo and press the <b>Open</b> button:</p> <p><b>Images</b></p> <p>Logo:</p>   <p>The invite logo will be visible in the scheduler invitation e-mails.</p>



In the **General data** section you can set the address/ phone/ description/ motto for your organization, which will be displayed in the scheduler web form. **Please note that in order these settings to be taken into account and propagated in Qaleido and also in the scheduler web form, pressing the *Save* button at the bottom side of the screen is mandatory.**

#### - General data

---

Address:	<input type="text" value="Lorem Ipsum is simply dummy text of the printing and typesetting industry..."/>
Phone:	<input type="text" value="(+40)123456789"/>
Webpage:	<input type="text" value="www.myorganization.com"/>
Short description:	<input type="text" value="Lorem Ipsum has been the industry's standard dummy text ever since the 1500s..."/>
Motto:	<input type="text" value="Lorem Ipsum has survived not only five centuries..."/>

You are allowed to set the weekly schedule for your organization in the **Schedule** section.

**In order these settings to be taken into account in the availability calculation, press the *Save* button, at the bottom side of the screen:**

**Schedule**

Monday:	<input type="text" value="08"/>	:	<input type="text" value="00"/>	-	<input type="text" value="18"/>	:	<input type="text" value="00"/>
Tuesday:	<input type="text" value="08"/>	:	<input type="text" value="00"/>	-	<input type="text" value="18"/>	:	<input type="text" value="00"/>
Wednesday:	<input type="text" value="08"/>	:	<input type="text" value="00"/>	-	<input type="text" value="18"/>	:	<input type="text" value="00"/>
Thursday:	<input type="text" value="08"/>	:	<input type="text" value="00"/>	-	<input type="text" value="18"/>	:	<input type="text" value="00"/>
Friday:	<input type="text" value="08"/>	:	<input type="text" value="00"/>	-	<input type="text" value="18"/>	:	<input type="text" value="00"/>
Saturday:	<input type="text" value="00"/>	:	<input type="text" value="00"/>	-	<input type="text" value="00"/>	:	<input type="text" value="00"/>
Sunday:	<input type="text" value="00"/>	:	<input type="text" value="00"/>	-	<input type="text" value="00"/>	:	<input type="text" value="00"/>

Save

## Scheduler settings tab


Activate the **Scheduler settings** tab. See the fields significance in the following table.


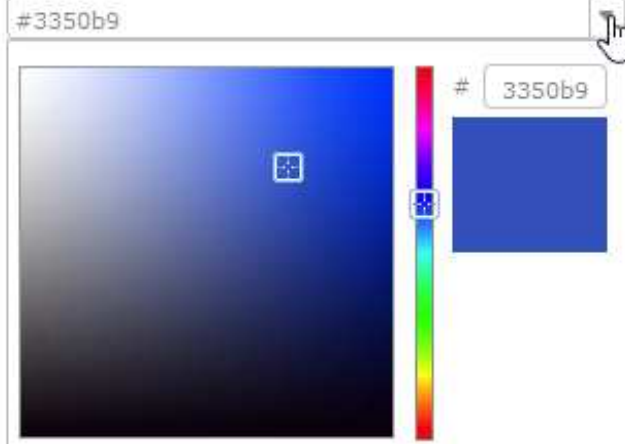
**Please note that in order these settings to be taken into account and propagated in the web form or invitation emails, pressing the *Save* button at the bottom side of the screen is mandatory.**

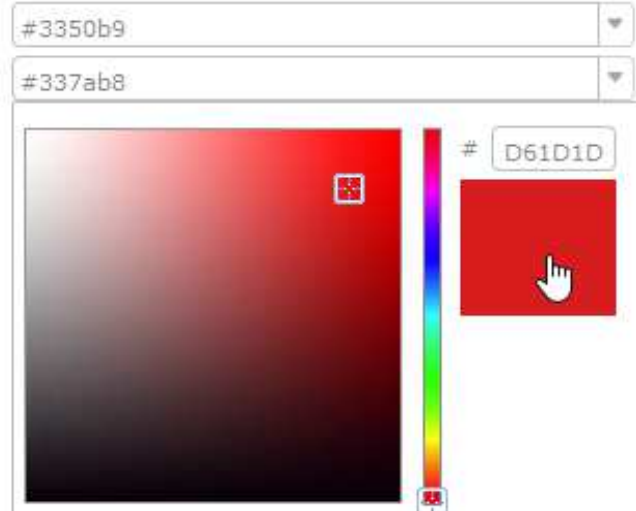
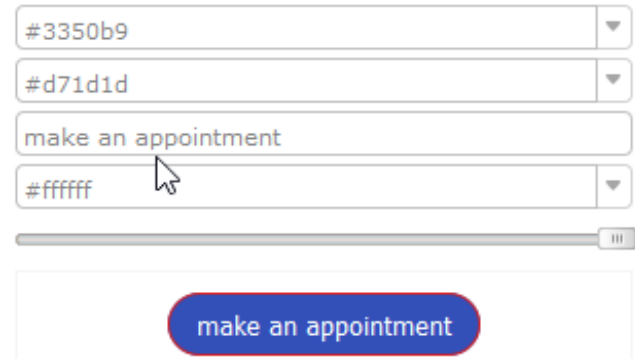
Subject	Description
Language	<p>Here you can select a language for the organization. The web form (accessed by the user in order to make appointments) will be displayed in the organization language set here.</p> <p>-Scheduler wizard settings-</p> <div><div>Language:</div><div>First day of week:</div><div>Date format:</div></div> <div><div>English</div><div>English</div><div>French</div><div>Dutch</div></div>
First day of week	<p>Here you can select the first day of the week. This is a display option, in order the employees availability screens/ calendars to show <b>Monday</b> or <b>Sunday</b> as the first day of the week.</p>
Date format	<p>Here you can select the date format. This format will be used in order to display the date fields in the web form and also in the invitation emails.</p> <p>-Scheduler wizard settings-</p> <div><div>Language:</div><div>First day of week:</div><div>Date format:</div><div>Time format:</div><div>Timezone:</div><div>Display category in wizard:</div></div> <div><div>English</div><div>Monday</div><div>Y/m/d</div><div>m/d/Y</div><div>m-d-Y</div><div>Y/m/d</div><div>Y-m</div><div>d/m/Y</div><div>d-m-Y</div></div> <p>-Scheduler wizard banner settings-</p>

Subject	Description
Time format	<p data-bbox="591 172 1877 236">Here you can select the organization time format. This format will be used in order to display the time fields in the web form and also in the invitation emails:</p> <p data-bbox="591 244 947 276"><b>-Scheduler wizard settings-</b></p> <div data-bbox="591 316 2056 619"> <div>Language: <div>English ▼</div></div> <div>First day of week: <div>Monday ▼</div></div> <div>Date format: <div>Y/m/d ▼</div></div> <div>Time format: <div>Show 24 hour time ▼</div></div> <div>Timezone: <div>Show 24 hour time</div></div> <div>Display category in wizard: <div>Separate AM/PM</div></div> </div>

Subject	Description
Timezone	<p>Here you can select the organization timezone. In the web form the time will be displayed according to the selected organization timezone:</p> <p><b>-Scheduler wizard settings-</b></p> <div data-bbox="591 323 2089 627"> <div>Language: <span>English</span></div> <div>First day of week: <span>Monday</span></div> <div>Date format: <span>Y/m/d</span></div> <div>Time format: <span>Show 24 hour time</span></div> <div>Timezone: <span>Europe/Bucharest</span></div> <div>Display category in wizard:</div> </div> <p><b>-Scheduler wizard banner settings-</b></p> <div data-bbox="591 770 775 850"> <div>Banner color:</div> <div>Banner image:</div> </div> <div data-bbox="1464 587 2089 1029"> <div>Europe/Amsterdam</div> <div>Europe/Andorra</div> <div>Europe/Athens</div> <div>Europe/Belfast</div> <div>Europe/Belgrade</div> <div>Europe/Berlin</div> <div>Europe/Bratislava</div> <div>Europe/Brussels</div> <div>Europe/Bucharest</div> <div>Europe/Budapest</div> </div>

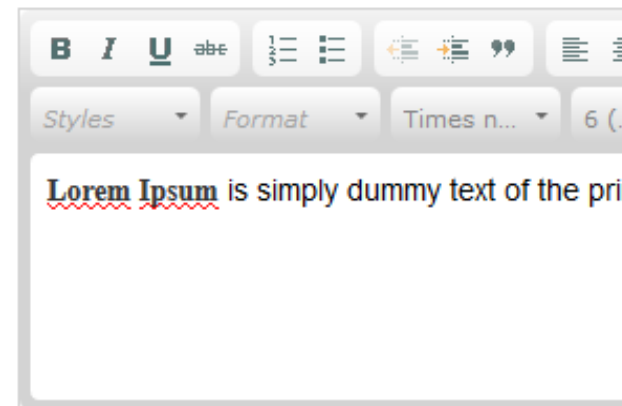
Subject	Description
Display category in wizard	<p>When this checkbox is <b>checked</b>, the <b>Categories</b> tab will be displayed in the web form along with the <b>Services, Time</b> and <b>Details</b> tabs.</p> <p>When it is <b>not checked</b>, in the web form only the <b>Services, Time</b> and <b>Details</b> tabs. By default it is checked.</p> <p>-Scheduler wizard settings-</p> <div> <div>Language:</div> <div>English</div> </div> <div> <div>First day of week:</div> <div>Monday</div> </div> <div> <div>Date format:</div> <div>Y/m/d</div> </div> <div> <div>Time format:</div> <div>Show 24 hour time</div> </div> <div> <div>Timezone:</div> <div>Europe/Bucharest</div> </div> <div> <div>Display category in wizard:</div> <div><input checked="" type="checkbox"/></div> </div>
Organization banner color	<p>Select a color from the color picker.</p> <p>In the web form, the banner section will be displayed with the chosen background color:</p> <p>-Scheduler wizard banner settings-</p> <div> <div>Banner color:</div> <div>#5c94b2</div> </div> <div> <div>Banner image:</div> <div>  </div> </div> <p>-Appointment button settings-</p>

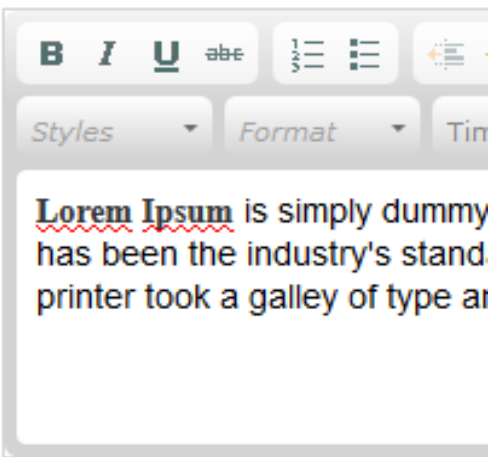
Subject	Description
Organization banner image	<p>You can also set a picture as the organization banner. Press the <b>Browse</b> button and select the desired picture. This picture will be displayed in the bellow preview, as background (the organization logo will be also visible over the banner). Also, after save, the organization's banner will be visible in the web form:</p> <p><a href="#">Scheduler wizard banner settings</a></p> <div data-bbox="591 331 2078 590"> <div> Banner color: <input type="text" value="#5c94b3"/> </div> <div> Banner image: <a href="#">Change photo</a>  </div> </div>
Appointment button color	<p>Here you can set the color for the appointment button. This button will be placed on your organization site in order the clients to access the appointments web form. Select the desired color from the datepicker.</p> <p>The button preview, will show the selected background color:</p> <p><a href="#">Appointment button settings</a></p> <div data-bbox="591 810 2078 1256"> <div> Button color: <input type="text" value="#3350b9"/> </div> <div> Button border color: </div> <div> Button text: </div> <div> Button text color: </div> <div> Button corners: </div> <div> Button embed code: </div> <div>  </div> </div>

Subject	Description
Appointment button border color	<p>Here you can set the border color for the appointment button. Select the desired color from the color picker. The button preview, will show the selected background color.</p> <p><b>Appointment button settings</b></p> <div> <div> <div>Button color:</div> <div>#3350b9</div> </div> <div> <div>Button border color:</div> <div>#337ab8</div> </div> <div> <div>Button text:</div> <div></div> </div> <div> <div>Button text color:</div> <div></div> </div> <div> <div>Button corners:</div> <div></div> </div> <div> <div>Button embed code:</div> <div></div> </div> </div> 
Appointment button text	<p>Here you can set the text for the appointment button. The button preview, will show the selected background color.</p> <p><b>Appointment button settings</b></p> <div> <div> <div>Button color:</div> <div>#3350b9</div> </div> <div> <div>Button border color:</div> <div>#d71d1d</div> </div> <div> <div>Button text:</div> <div>make an appointment</div> </div> <div> <div>Button text color:</div> <div>#ffffff</div> </div> <div> <div>Button corners:</div> <div></div> </div> </div> 



Subject	Description
Appointment button text color	Here you can set the text color for the appointment button. The button preview, will show the selected background color.
Appointment button corners	You can also change the appointment button shape by rounding or not its corners. Move the slider until the button displayed in the bottom preview will have the desired shape. The button preview, will show the selected background color.
<div> <div>Appointment button settings</div> <div> <div> <div>Button color:</div> <div>#3350b9</div> </div> <div> <div>Button border color:</div> <div>#d71d1d</div> </div> <div> <div>Button text:</div> <div>make an appointment</div> </div> <div> <div>Button text color:</div> <div>#ffffff12</div> </div> <div> <div>Button corners:</div> <div> <div></div> <div></div> </div> </div> <div> <div>make an appointment</div> </div> </div> </div>	
Button embed code	<p>When making the settings for the appointment button, the related HTML sequence will be automatically generated in this field.</p> <p>By pressing the bellow <b>Click to copy</b> button, this sequence will be copied in the clipboard, so that it will can be afterward inserted on your site, in order to make the button visible and usable there:</p> <div> <div>Button embed code:</div> <div> <div> <div>&lt;button type="button" style="cursor: pointer;padding: 5px 10px 5px 10px;background: #3350b9;color: #ffffff;border: 1px solid #d71d1d;-webkit-</div> <div></div> </div> <div>Click to copy</div> </div> </div>

Subject	Description
Minimum time prior to booking	<p>This is the minimum time which should exist from the current hour until the chosen appointment hour. This value is expressed in minutes and will be taken into account in the availability calculation:</p> <p>— <b>Booking settings</b> —</p> <div> <div>Minimum time prior to booking (minutes):</div> <input type="text" value="60"/> </div> <div> <div>Time in advance that an appointment can be booked (days):</div> <input type="text" value="30"/> </div>
Time in advance that an appointment can be booked	<p>This is the time in advance, expressed in days, in which an appointment can be made (e.g. two days before, ten days before etc.):</p> <p>— <b>Booking settings</b> —</p> <div> <div>Minimum time prior to booking (minutes):</div> <input type="text" value="60"/> </div> <div> <div>Time in advance that an appointment can be booked (days):</div> <input type="text" value="30"/> </div>
Introductory text for invitation mail	<p>This is the text which will be displayed in the invitation mail after an appointment is made:</p> <div> <div>Introductory text for invitation mail:</div> <div>  </div> </div>


Subject	Description
Ending text for invitation mail	<p>This is the text which will be displayed in the invitation mail after an appointment is made:</p> <p>Ending text for invitation mail:</p> 
Send notification mail to power user when an appointment is created	<p>When this checkbox is checked, when an appointment is performed and the client confirms it, the organization's power user will be also notified:</p> <p>Send notification mail to power user when an appointment is created: <input checked="" type="checkbox"/></p>
Use odd/even weeks	<p>When it is checked, you can set a user availability to be distinct on odd and even weeks. When it is not checked you can set a user availability to be the same on all weeks. By default it is unchecked.</p> <p><b>Availability settings</b></p> <p>Use odd/even weeks: <input type="checkbox"/></p> <p>Padding time between appointments (minutes): <input type="text" value="15"/></p>
Padding time between appointments	<p>The time between to appointments. It expressed in minutes,</p> <p><b>Availability settings</b></p> <p>Use odd/even weeks: <input type="checkbox"/></p> <p>Padding time between appointments (minutes): <input type="text" value="15"/></p>

## Scheduler categories tab

Here you can create/ edit/ delete categories for your organization.

In order to add a category, press the  button at the top of the screen, in the **Scheduler categories** tab.

The add category window will be displayed:



**Add Scheduler category** ✕

Name:

Description:

Upload photo:

Subject	Description
Name	Here you can set a category name. This field is mandatory. The limit is 150 chars.
Description	Here you can set a description for the category The limit is 450 chars.
Upload photo	Adding a photo for the created category is also possible. Press the <b>Browse</b> button and select the desired picture. The picture will be uploaded and displayed at the left side of the window.

By pressing the **Delete photo** button the uploaded picture will be not anymore displayed in the add window.

By pressing the **Change photo** button the existing photo can be changed with another selected one.

Save	Press the <b>Save</b> button in order the new category to be saved and displayed in the categories list.
Cancel	Press the <b>Cancel</b> button in order the add category action to be cancelled.

In order to edit a category, press the inline  button in the categories screen.

The edit category window will be displayed.

**Edit Scheduler category: Skin Care** ✕







Delete photo

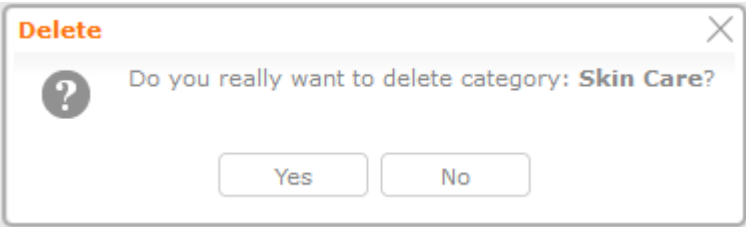
Name:

Description:

Upload photo:

Subject	Description
Name	Here you can set a category name. This field is mandatory. The limit is 150 chars.
Description	Here you can set a description for the category The limit is 450 chars.
Upload photo	Adding a photo for the created category is also possible. Press the <b>Browse</b> button and select the desired picture. The picture will be uploaded and displayed at the left side of the window.
	 <p>By pressing the <b>Delete photo</b> button the uploaded picture will be not anymore displayed in the add window. By pressing the <b>Change photo</b> button the existing photo can be changed with another selected one.</p>
	Press the <b>Save</b> button in order the new category to be saved and displayed in the categories list.
	Press the <b>Cancel</b> button in order the add category action to be cancelled.

In order to delete a category, press the inline  button.  
A delete confirmation pop-up will be displayed:



Subject	Description
<div>Yes</div>	Press the <b>Yes</b> button in order the category to be deleted and to be not displayed anymore in the categories list.
<div>No</div>	Press the <b>No</b> button in order the delete category action to be cancelled.

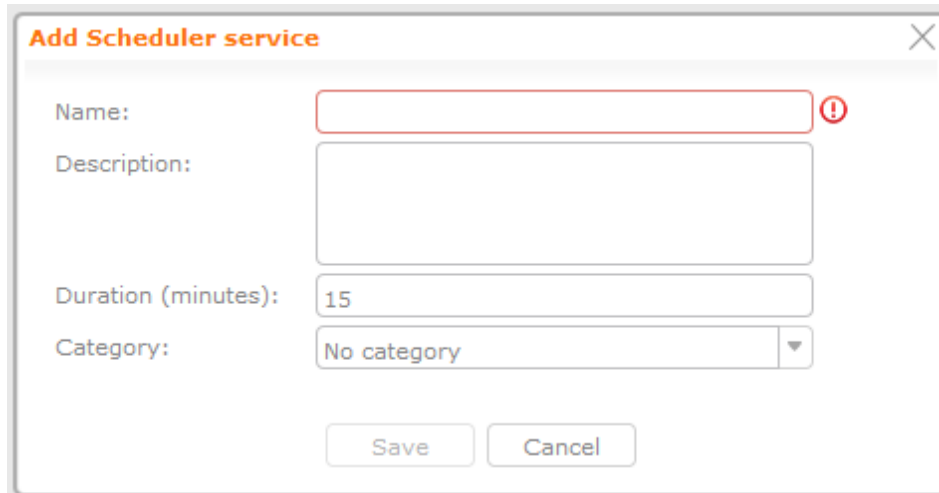


## Scheduler services tab

Here you can create and assign to a category/ edit/ delete services for your organization.

In order to add a category, press the  button at the top of the screen, in the Scheduler services tab.


The add service window will be displayed:



The image shows a dialog box titled "Add Scheduler service" with a close button (X) in the top right corner. The dialog contains four input fields: "Name:" (a text box with a red border and a red exclamation mark icon to its right), "Description:" (a larger text box), "Duration (minutes):" (a text box containing the value "15"), and "Category:" (a dropdown menu showing "No category" with a downward arrow). At the bottom of the dialog are two buttons: "Save" and "Cancel".

Subject	Description
Name	Here you can set a service name. This field is mandatory. The limit is 150 chars.
Description	Here you can set a description for the service The limit is 450 chars.
Duration	Here you can set a duration for the service. The duration is expressed in minutes.
Category	Here you can select a category, in order the new created service to be assigned to it. There is also the <b>No category</b> option, in this case the service being not linked to any category: <div> Category: <div> No category No category Body Care Skin Care </div> </div>
Save	Press the <b>Save</b> button in order the new service to be saved and displayed in the services list.
Cancel	Press the <b>Cancel</b> button in order the add service action to be cancelled.

After the service is created, it will be displayed in the services list, which is grouped by category:

Home Organization <span>Appearance and schedul...</span>			
General settings for organization Scheduler settings Scheduler categories <b>Scheduler services</b>			
+			
<input type="checkbox"/> Name	Description	Duration (minutes)	Category ▲
Category: Body Care (1 Item)			
<input type="checkbox"/> Body Massage	Lorem Ipsum is simply dummy text...	30	Body Care  
Category: Skin Care (1 Item)			
<input type="checkbox"/> Face Massage	Lorem Ipsum is simply dummy text...	15	Skin Care  

In order to edit a service, press the inline ✎ button in the services screen.  
The edit service window will be displayed.

**Add Scheduler service** ✕

Name:

Face Massage

Description:

Lorem Ipsum is simply dummy text of the printing and typesetting industry.

Duration (minutes):

15

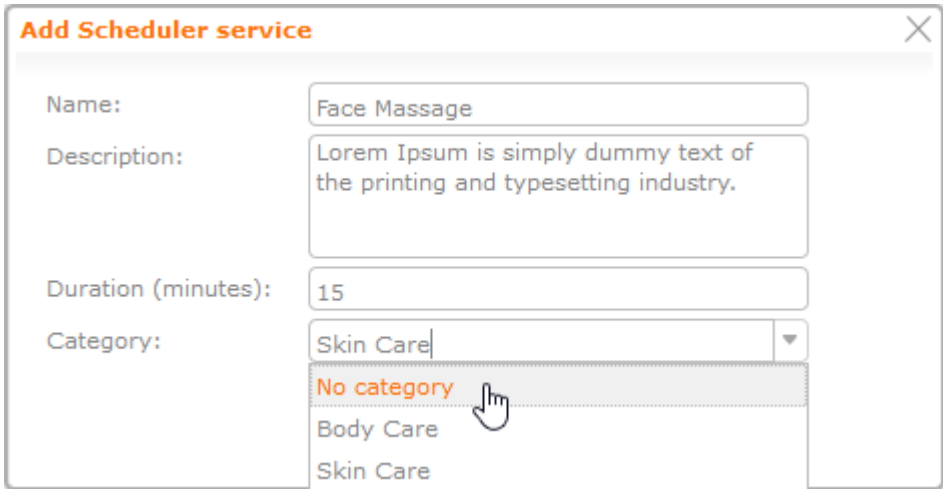
Category:


Skin Care

▼

Save

Cancel

Subject	Description
Name	Here you can set a service name. This field is mandatory. The limit is 150 chars.
Description	Here you can set a description for the service The limit is 450 chars.
Duration	Here you can set a duration for the service. The duration is expressed in minutes.
Category	Here you can select a category, in order the new created service to be assigned to it. There is also the <b>No category</b> option, in this case the service being not linked to any category:
	
Save	Press the <b>Save</b> button in order the new service to be saved and displayed in the services list.
Cancel	Press the <b>Cancel</b> button in order the add service action to be cancelled.

In order to delete a service, press the inline  button.  
A delete confirmation pop-up will be displayed:

Delete


?

Do you really want to delete service: **Face Massage**?

Yes

No

Subject	Description
<div>Yes</div>	Press the <b>Yes</b> button in order the service to be deleted and to be not displayed anymore in the services list.
<div>No</div>	Press the <b>No</b> button in order the delete service action to be cancelled.

Press the  button in order to be able to see the already assigned users or to assign/ unassign users to a certain service.  
In the open window, check / uncheck the desired users:

Add users to service Face Massage

☐ Full name ▲

Username

☒ Anne Roberts

anne.roberts

☐ Charles Thompson

charles.thompson

☒ hellen smith

hellen.smith

☐ Marianne Edwards



marianne.edwards

☐ robert dickens

robert.dickens

Save

Cancel



Subject	Description
	Press the <b>Save</b> button in order the last selections to be saved.
	Press the <b>Cancel</b> button in order the old selections to be kept.




## Manage users tab
































As power user of your organization open the **Organization** tab.

In the organization's menu choose the **Show Manage Users grid for organization** option.

Here you can add/ edit/ delete users for your organization, set the vacation period or the availability for these users.

Home Organization  **Manage Users: Flower S...** 





 Default view ▼

<input type="checkbox"/>	User Name 	Full Name	User Type	Accounts Num...	
<input type="checkbox"/>	anne.roberts	Anne Roberts	Basic user	1	     
<input type="checkbox"/>	charles.thompson	Charles Thompson	Power user	1	     
<input type="checkbox"/>	hellen.smith	hellen smith	Basic user	1	     
<input type="checkbox"/>	marianne.edwards	Marianne Edwards	Basic user	1	     
<input type="checkbox"/>	robert.dickens	robert dickens	Basic user	1	     

In order to add a user, press the **+** button at the top left side of the **Manage users** screen. The add user wizard will be open with the **General User Information** screen:

**Add User Wizard** ✕

**Step 1 of 7: General User Information**

User Type:

First Name:

Middle Name:

Last Name:

Domain:

User Name:

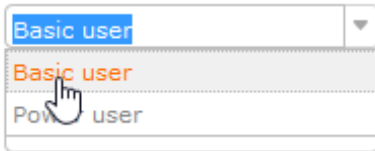


Qaleido password:

E-mail account: @dev.qaleido.com

Job title:

Description:

< Previous **Next >** Cancel


Subject	Description
User Type	<p>Here you can select the user type, which can be power user (with administrator rights for your company) or basic user:</p> <p>User Type: </p> <p>First Name:</p> <p>Middle Name:</p>
First Name	Here you can set the user's first name.
Middle Name	Here you can set a middle name for the user.
Last Name	Here you can set the user's last name.
Domain	<p>You can select a domain, from the organization's valid domains:</p> <p>Domain: </p> <p>User Name:</p> <p>Qaleido password: </p>
User Name	<p>The username will be generated based on the first/ middle/last name.</p> <p>It is an editable field, so that this can be changed</p>
Qaleido Password	Here you can set the Qaleido password for the new user.
E-mail account	Based on the set username and the selected domain, an email address will be generated here.
Job Title	<p>Here you can set the user's job title.</p> <p>The limit is 100 chars.</p>
Description	<p>Here you can set a description for the user's job.</p> <p>The limit is 450 chars.</p>



Press the **Next** button. The **E-mail settings** screen will be displayed in the add user wizard:

Add User Wizard

Step 2 of 7: E-mail Settings



Max no. of accounts:

1

Max no. of aliases:

0

E-mail dimension:

1

GB

▼

QDisk dimension:

1

GB

▼

< Previous

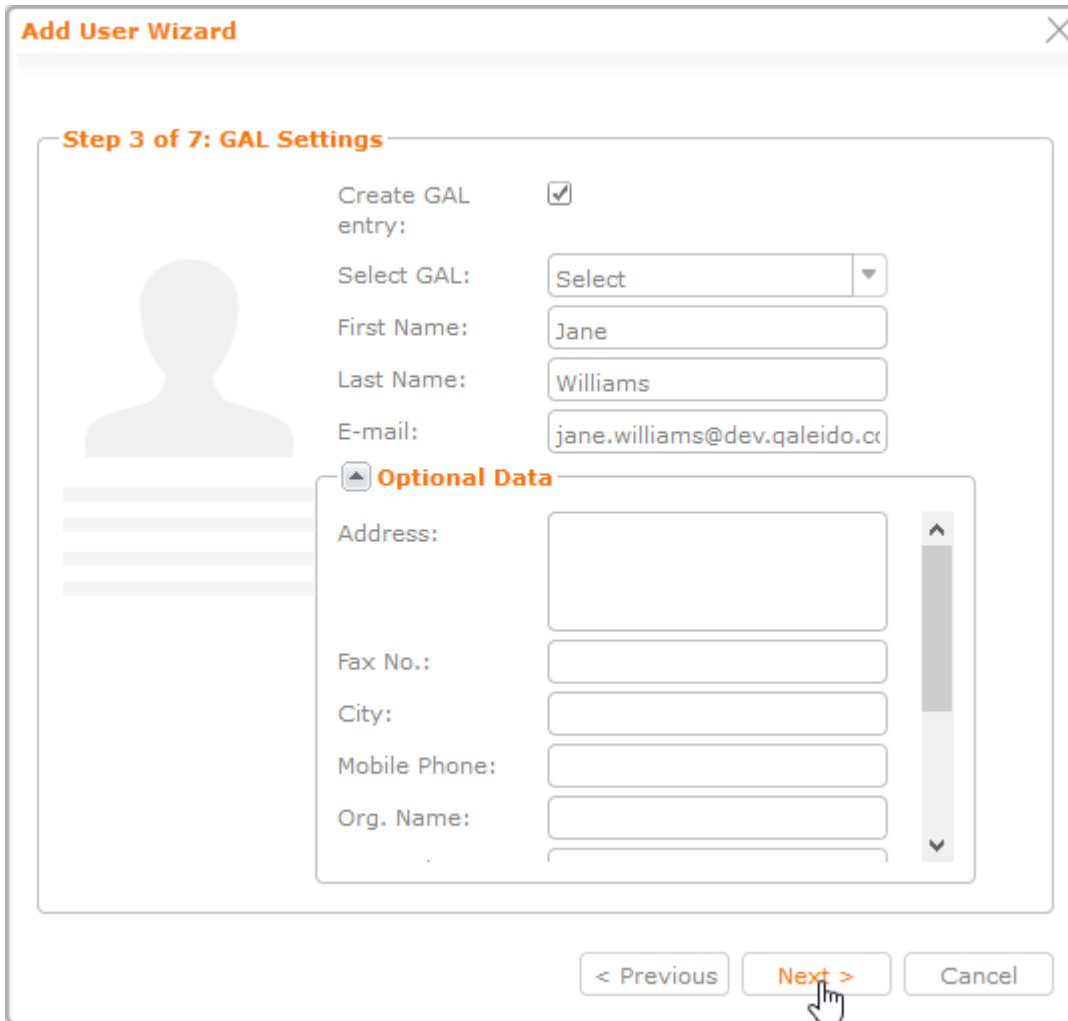
Next >

Cancel

Subject	Description
Max no. of accounts	Here you can select the user's max number of e-mail accounts. This number must be in the limit set at the organization level.
Max. No of aliases	Here you can select the user's max number of aliases. This number must be in the limit set at the organization level.
E-mail dimension	Here you can set the total quota for the user's e-mail accounts. This number must be in the limit set at the organization level.
Qdisk dimension	Here you can set the total quota for the user's Qdisk. This number must be in the limit set at the organization level.

Press the **Next** button. The **E-mail settings** screen will be displayed in the add user wizard.

Here you can choose to add the user in one of the organization's GALs, by checking the **Create GAL entry** checkbox and by selecting a GAL in the **Select GAL** combo:



The image shows a software window titled "Add User Wizard" with a close button (X) in the top right corner. The window is at "Step 3 of 7: GAL Settings". On the left, there is a grey silhouette of a person. To the right of the silhouette are several input fields: "Create GAL entry:" with a checked checkbox, "Select GAL:" with a dropdown menu showing "Select", "First Name:" with the text "Jane", "Last Name:" with the text "Williams", and "E-mail:" with the text "jane.williams@dev.qaleido.co". Below these fields is an expandable section titled "Optional Data" with a small upward-pointing arrow icon. This section contains five more input fields: "Address:", "Fax No.:", "City:", "Mobile Phone:", and "Org. Name:". At the bottom of the window are three buttons: "< Previous", "Next >" (which is highlighted in orange and has a mouse cursor pointing at it), and "Cancel".

Press the **Next** button. In the next screen you can choose to add the user in one of the organization's groups of users (if they exist):

Add User Wizard

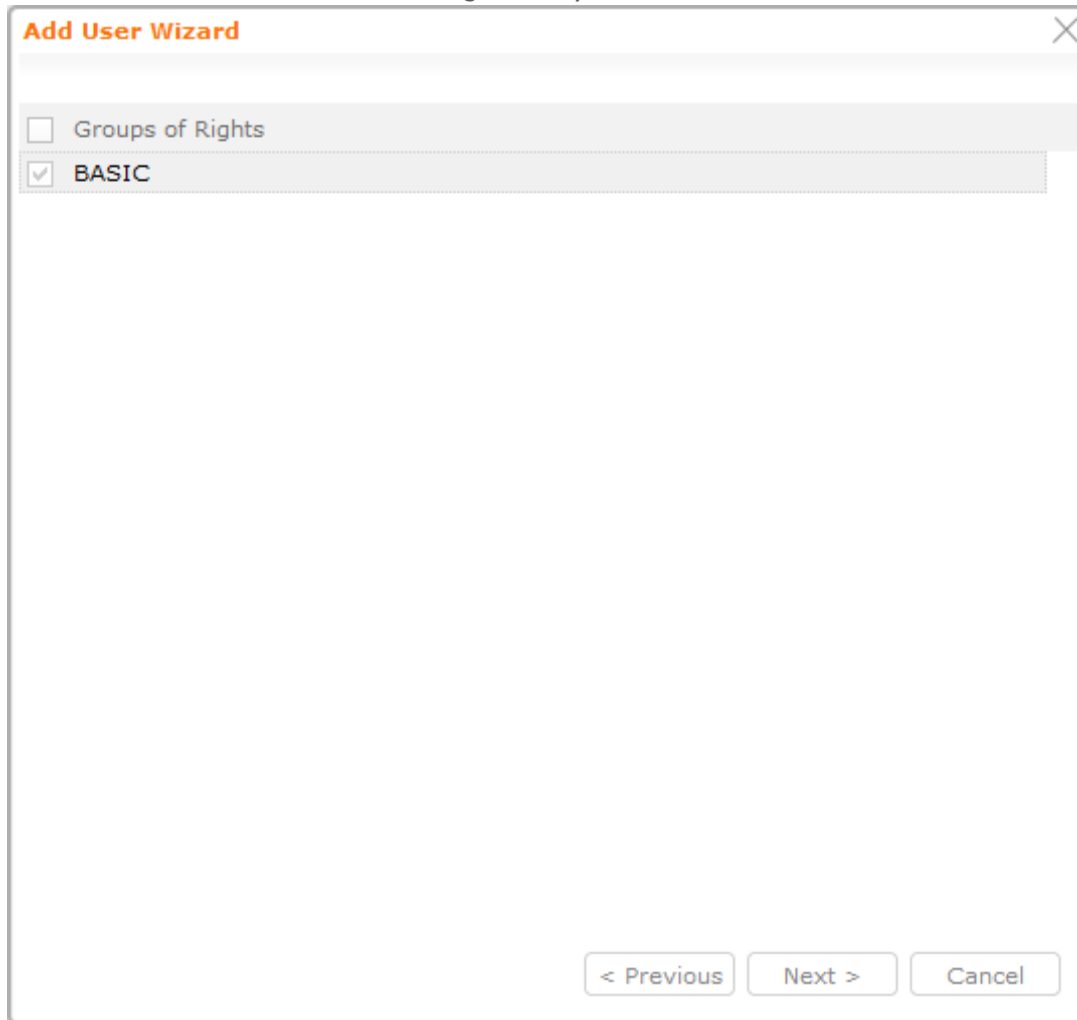
☐ Groups of Users

< Previous

Next >

Cancel

Press the **Next** button. In the following screen you can choose to add the user in one of the organization's rights groups (other than the **BASIC** group, if they exist):




The image shows a dialog box titled "Add User Wizard" with a close button (X) in the top right corner. Inside the dialog, there are two checkboxes. The first checkbox is labeled "Groups of Rights" and is unchecked. The second checkbox is labeled "BASIC" and is checked. At the bottom of the dialog, there are three buttons: "< Previous", "Next >", and "Cancel".

Press the **Next** button. In the following screen you can set a Qchat account for the user, by checking the **Active chat account** checkbox:

Add User Wizard

Step 6 of 7: Chat Account Settings



Active chat account:

☐

Create on chat server:

☒

Username:

Chat Id:

<None>

Use Qaleido password:

☒

New account password:

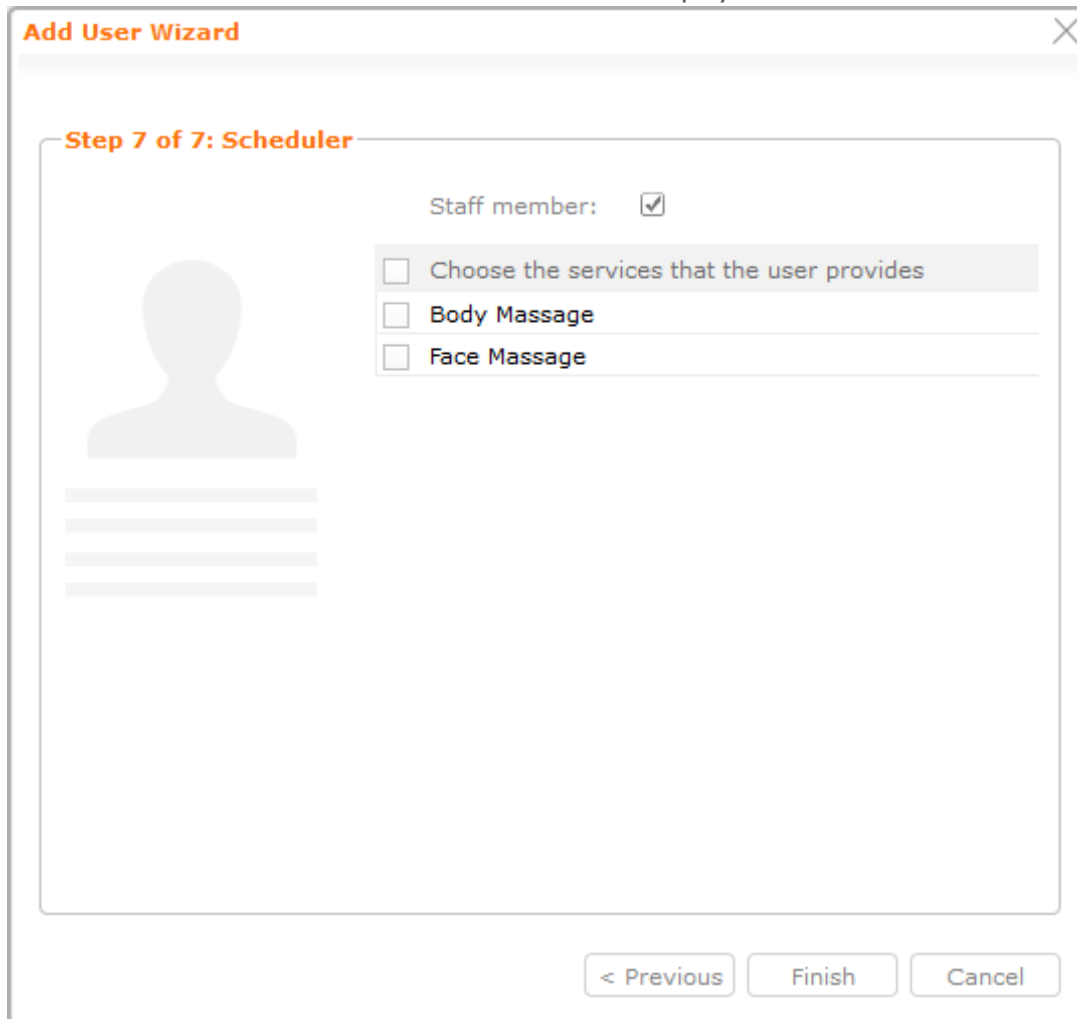
Confirm new password:

< Previous

Next >

Cancel

Press the **Next** button. The **Scheduler** screen will be displayed in the add user wizard:



The image shows a software window titled "Add User Wizard" with a close button (X) in the top right corner. The window is divided into a header area and a main content area. The header area contains the text "Step 7 of 7: Scheduler" in orange. The main content area is divided into two sections. On the left, there is a placeholder for a user profile picture, represented by a gray silhouette of a person's head and shoulders, and below it, four horizontal lines representing text input fields. On the right, there is a form with the following elements: a label "Staff member:" followed by a checked checkbox; a checkbox labeled "Choose the services that the user provides"; a checkbox labeled "Body Massage"; and a checkbox labeled "Face Massage". At the bottom of the window, there are three buttons: "< Previous", "Finish", and "Cancel".

**Add User Wizard**

**Step 7 of 7: Scheduler**


Staff member: ☒

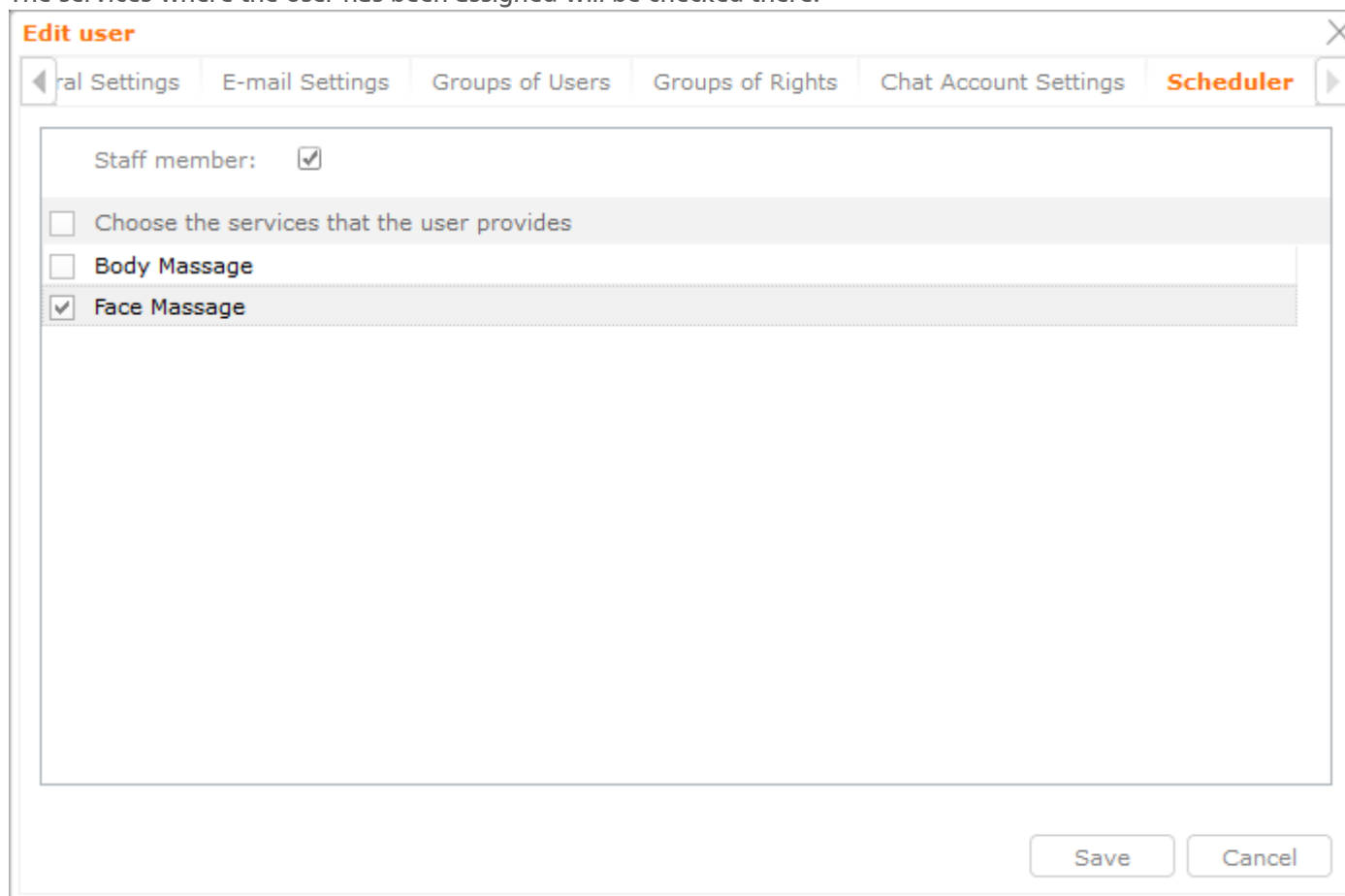
☐ Choose the services that the user provides

☐ Body Massage

☐ Face Massage

< Previous Finish Cancel

Press the inline  button in order to edit a user. The Scheduler tab will be visible in the edit user wizard. The services where the user has been assigned will be checked there:



**Edit user** [X]

General Settings | E-mail Settings | Groups of Users | Groups of Rights | Chat Account Settings | **Scheduler**

Staff member: ☒

☐ Choose the services that the user provides

- ☐ Body Massage
- ☒ Face Massage

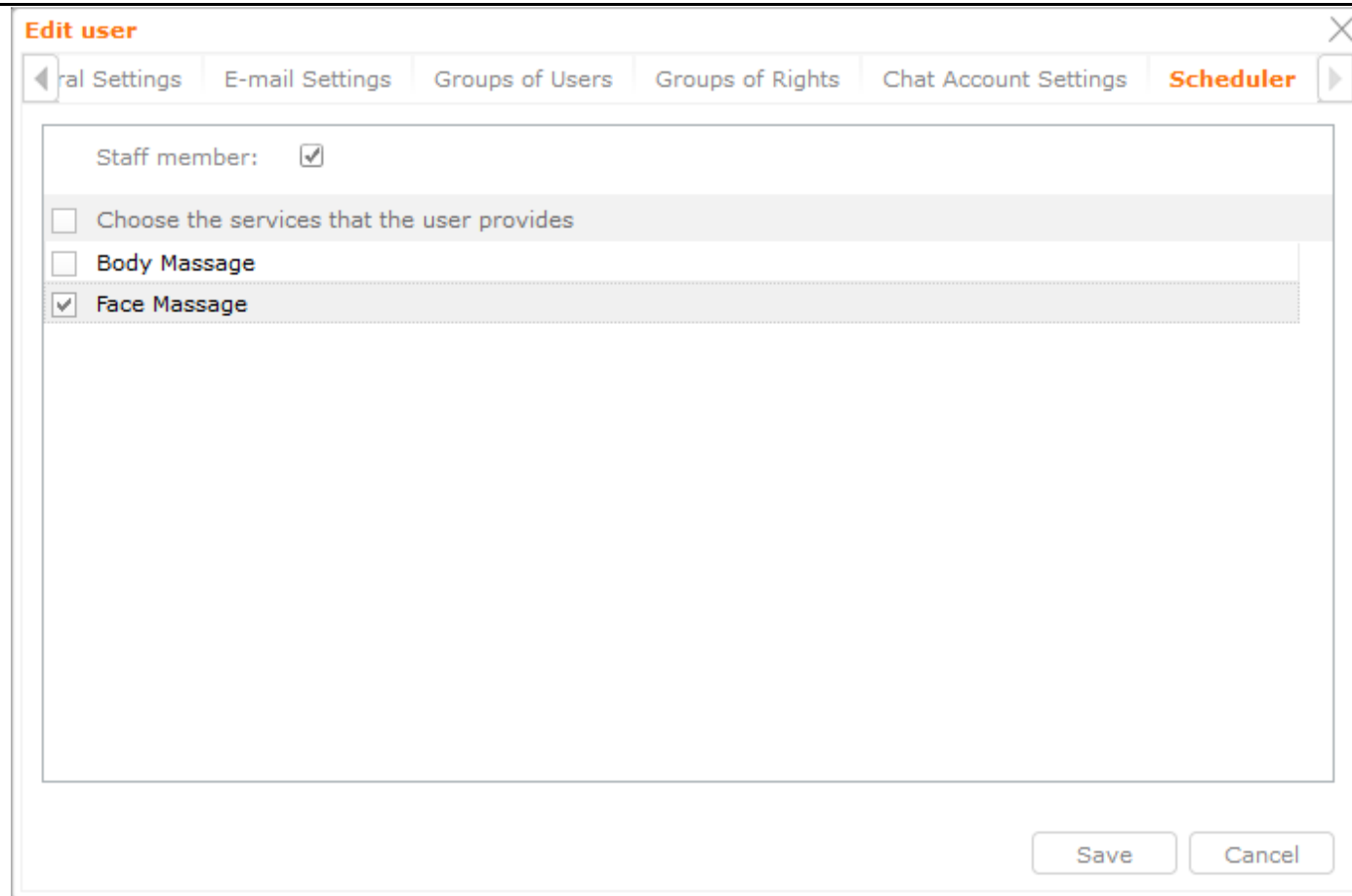
Save Cancel

Subject	Description
Staff member	When it is <b>checked</b> , the list of services will be available bellow, in order the user to be assigned to certain services. Select one/ more services and press the <b>Save</b> button. The user will be display in the web form, when an appointment is initiated on one of the selected services:



## Subject

## Description



The screenshot shows a web application window titled "Edit user" with a close button (X) in the top right corner. Below the title bar is a tabbed interface with five tabs: "General Settings", "E-mail Settings", "Groups of Users", "Groups of Rights", and "Scheduler". The "Scheduler" tab is selected and highlighted in orange. The main content area of the "Scheduler" tab contains a "Staff member:" label followed by a checked checkbox. Below this is a list of services with checkboxes: "Choose the services that the user provides" (unchecked), "Body Massage" (unchecked), and "Face Massage" (checked). The "Face Massage" item is highlighted with a light blue background. At the bottom right of the dialog are "Save" and "Cancel" buttons.

**Edit user**

General Settings | E-mail Settings | Groups of Users | Groups of Rights | Chat Account Settings | **Scheduler**

Staff member: ☒

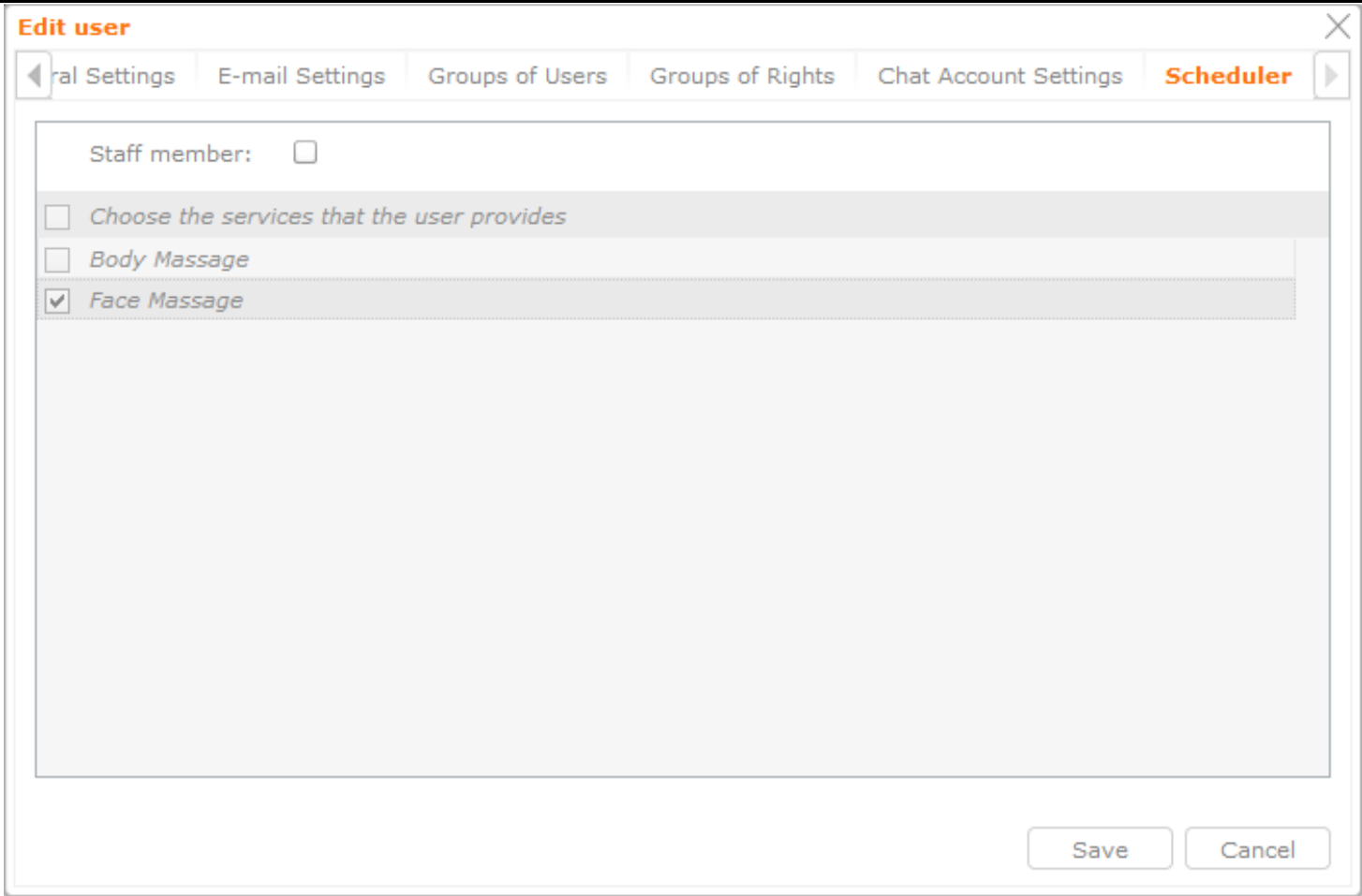
☐ Choose the services that the user provides

☐ Body Massage


☒ Face Massage

Save Cancel

When it is **not checked**, the services list will be not available, the user being not taken into account for appointments in the web form:

Subject	Description
	 <p>The screenshot shows the 'Edit user' dialog box with the 'Scheduler' tab selected. The 'Staff member' checkbox is unchecked. The list of services includes 'Choose the services that the user provides' (unchecked), 'Body Massage' (unchecked), and 'Face Massage' (checked). The 'Save' and 'Cancel' buttons are at the bottom right of the dialog.</p>
Save	Press the <b>Save</b> button in order the changes to be taken into account.
Cancel	Press the <b>Cancel</b> button in order the old settings to be taken into account.

## Manage users – Availability

In the **Manage users** screen, press the inline  button.

In a new tab you can set the availability for the selected user.

The way the **Availability** screen is displayed depends on the **First day of week** and the **Use odd/ even weeks** value, set as it is described in in the **Scheduler settings tab** chapter.

If the **Use odd/ even weeks** checkbox is **checked**, you will be able to set differentially the availability for the user, on odd and even weeks:

[Home](#) [Organization](#) [Manage Users: Flower S...](#) [marianne.edwards](#)

For odd weeks: ☒ Publish availability schedule : enabled ▼

	Day	Interval 1	Interval 2	Interval 3	Active
1	Sunday	08:00- 18:00			<input checked="" type="checkbox"/>
2	Monday	08:00- 18:00			<input checked="" type="checkbox"/>
3	Tuesday	08:00- 18:00			<input checked="" type="checkbox"/>
4	Wednesday	08:00- 18:00			<input checked="" type="checkbox"/>
5	Thursday	08:00- 18:00			<input checked="" type="checkbox"/>
6	Friday	08:00- 18:00			<input checked="" type="checkbox"/>
7	Saturday	08:00- 18:00			<input checked="" type="checkbox"/>

For even weeks: ☒ Publish availability schedule : enabled ▼

	Day	Interval 1	Interval 2	Interval 3	Active
1	Sunday	08:00- 18:00			<input checked="" type="checkbox"/>
2	Monday	08:00- 18:00			<input checked="" type="checkbox"/>
3	Tuesday	08:00- 18:00			<input checked="" type="checkbox"/>
4	Wednesday	08:00- 18:00			<input checked="" type="checkbox"/>
5	Thursday	08:00- 18:00			<input checked="" type="checkbox"/>
6	Friday	08:00- 18:00			<input checked="" type="checkbox"/>
7	Saturday	08:00- 18:00			<input checked="" type="checkbox"/>

If the **Use odd/ even weeks** checkbox is **unchecked**, you will be able to set uniquely the availability for the user, for both odd/ even weeks:

Home Organization  Manage Users: Flower S...  **marianne.edwards**  

☒ Publish availability schedule : enabled ▼

	Day	Interval 1	Interval 2	Interval 3	Active
1	Sunday	08:00- 18:00			<input checked="" type="checkbox"/>
2	Monday	08:00- 18:00			<input checked="" type="checkbox"/>
3	Tuesday	08:00- 18:00			<input checked="" type="checkbox"/>
4	Wednesday	08:00- 18:00			<input checked="" type="checkbox"/>
5	Thursday	08:00- 18:00			<input checked="" type="checkbox"/>
6	Friday	08:00- 18:00			<input checked="" type="checkbox"/>
7	Saturday	08:00- 18:00			<input checked="" type="checkbox"/>

The user's set availability will be taken into account in the web form, when display the appointments available hours.

In order to set the user availability for a certain day of the week, double click on the inline **Interval1/ Interval2/ Interval3** column and select the start/ end hour from the displayed select box:

Home Organization Manage Users: Flower S... marianne.edwards

☒ Publish availability schedule : enabled

Day	Interval 1	Interval 2	Interval 3	Active
Sunday	08:00	18:00		
Monday	04:45			<input checked="" type="checkbox"/>
Tuesday	05:00			<input checked="" type="checkbox"/>
Wednesday	05:15			<input checked="" type="checkbox"/>
Thursday	05:30			<input checked="" type="checkbox"/>
Friday	05:45			<input checked="" type="checkbox"/>
Saturday	06:00			<input checked="" type="checkbox"/>

Subject	Description
<div>Update</div>	Press the <b>Update</b> button in order to save the availability settings.
<div>Cancel</div>	Press the <b>Cancel</b> button in order to keep the old settings.
<div><input checked="" type="checkbox"/></div>	<p>When this inline icon is visible, the availability for the corresponding day of the week is <b>active</b> and will be taken into account in the availability calculation, in the web form.</p> <p>Press this icon in order to <b>deactivate</b> the availability for the corresponding day of the week. In this case, the availability for the corresponding day of the week will be not taken into account in the availability calculation, in the web form.</p> <p>Also the <input checked="" type="checkbox"/> button will be replaced with the <input checked="" type="checkbox"/> in the Qaleido availability screen:</p>

## Subject

## Description

Home Organization  Manage Users: Flower S...  **marianne.edwards** 

☒ Publish availability schedule : enabled ▼

	Day	Interval 1	Interval 2	Interval 3	Active
1	Sunday	08:00- 18:00			<input checked="" type="checkbox"/>
2	Monday	08:00- 18:00			<input checked="" type="checkbox"/>
3	Tuesday	08:00- 18:00			<input checked="" type="checkbox"/>
4	Wednesday	08:00- 18:00			<input checked="" type="checkbox"/>
5	Thursday	08:00- 18:00			<input checked="" type="checkbox"/>
6	Friday	08:00- 18:00			<input checked="" type="checkbox"/>
7	Saturday	08:00- 18:00			<input checked="" type="checkbox"/>

**Note:** The users availability can be also set on the Qaleido user account, in the **Settings/ Availability** screen:


Home **Settings** 

General settings E-mail QChat Accounts Change password SyncMobile Themes Rules Public keys Tools **Availability** Quota

☒ Publish availability schedule : enabled ▼

	Day	Interval 1	Interval 2	Interval 3	Active
1	Sunday	08:00- 18:00			<input checked="" type="checkbox"/>
2	Monday	08:00- 18:00			<input checked="" type="checkbox"/>
3	Tuesday	08:00- 18:00			<input checked="" type="checkbox"/>
4	Wednesday	08:00- 18:00			<input checked="" type="checkbox"/>
5	Thursday	08:00- 18:00			<input checked="" type="checkbox"/>
6	Friday	08:00- 18:00			<input checked="" type="checkbox"/>
7	Saturday	08:00- 18:00			<input checked="" type="checkbox"/>

## Manage users – Vacation

In the **Manage users** screen, press the in-line  button.  
In a new tab you can set the vacation for the selected user.

### Vacation management form

Current account:

marianne.edwards@dev.qaleido.com

Enable auto-response:

☐

Start date:

End date:

Only send to a particular user:

Once a day

Save

Subject	Description
Current account	<p>Here you can select one of the users mail account, in order the vacation auto-response e-mail to be sent from it:</p> <p><b>Vacation management form</b></p> <p>Current account: <input type="text" value="marianne.edwards@dev.qaleido.com"/></p> <p>Enable auto-response: <input type="text" value="marianne.edwards@dev.qaleido.com"/></p> <p>Start date: <input type="text"/></p>
Enable auto-response	Check this checkbox in order to enable sending the vacation auto-response.
Start date	Set the start date of the interval when the vacation auto-response e-mail to be sent.
End date	Set the end date of the interval when the vacation auto-response e-mail to be sent.
Only send to a particular user	<p>Here you can set a frequency for the vacation auto-response sending. This can be <b>Once a day</b>, <b>Once every 3 days</b>, <b>Once a week</b> or <b>Once a month</b>:</p> <p>Only send to a particular user: <input type="text" value="Once a day"/></p>
<input type="button" value="Save"/>	Press this button in order to save the user's vacation settings.

The vacation settings is taken into account in the user's availability calculation, so that in the set vacation interval the user will be displayed as not available in the web form.



# Webform

In the **Organization** tab, press the organization line in grid and then press the **Scheduler** link in the organization's details panel:

[Home](#) [Organization](#)

<input type="checkbox"/>	Organization name	Address	Phone	Default domain	Default virtual host
<input type="checkbox"/>	Flower Salon SPA	Lorem Ipsum ...	(+40)123456...	dev.qaleido.com	

Page 1 of 1

Items per page 20

Quick search

Displaying 1 - 1 of 1

Manage organization

Phone

(+40)123456789

Webpage

Short description

Motto

Domains

Domain	Virtual host
dev.qaleido.com	(default)

Limits

Maximum number of users: 10

Maximum number of mail accounts: 1

Maximum number of aliases: 1

Mailbox size: 1.00 GB

Organization E-mail Quota Size: 10.00 GB

Organization QDisk Quota Size: 10.00 GB

Generation rules

E-mail address generation rule: first.middlelast

Username generation rule: first.middlelast

Schedule

Monday: 08:00 - 18:00

Tuesday: 08:00 - 18:00

Wednesday: 08:00 - 18:00

Thursday: 08:00 - 18:00

Friday: 08:00 - 18:00

Saturday: 00:00 - 00:00

Sunday: 00:00 - 00:00

Scheduler link:

[https://dev.qaleido.com/~carmen.nequlescu/testcomplete\\_branch/public/scheduler/11811158655875f3c82f09697157437232508](https://dev.qaleido.com/~carmen.nequlescu/testcomplete_branch/public/scheduler/11811158655875f3c82f09697157437232508)

The web form will be displayed in a new tab. By selecting the desired category/ service/ user, a client will be able to make an appointment based on the user's displayed availability:



DEPARTMENT  
selected department

SERVICES  
selected service

TIME  
selected time

DETAILS



#### Body Care

Lorem Ipsum is simply dummy text of the printing and typesetting industry.




#### Skin Care

Lorem Ipsum is simply dummy text of the printing and typesetting industry.

In order to access the web form, in the **Manage users** screen press the inline **i** button.  
A window containing information about the user will be displayed:

**Marianne Edwards**



First name: **Marianne**

Middle name:

Last name: **Edwards**

User name: **marianne.edwards**

User role: **basic user**

Job title: **Massager**

Description: **Lorem Ipsum is simply dummy text of the printing and typesetting industry.**

Chat id: **not set**

QPlan capacity: **0 hours**

**E-mail settings**

Max no. of accounts: **1**

Max no. of aliases: **0**

E-mail dimension: **1024 MB**

QDisk dimension: **1024 MB**

An URL will be available at the bottom side of this screen:

Marianne Edwards

Max no. of accounts: 1

Max no. of aliases: 0

E-mail dimension: 1024 MB

QDisk dimension: 1024 MB

Groups of Users the user is part of

no groups

Groups of Rights the user is part of

BASIC

Scheduler information

Is staff member: Yes

Provided services:



Body Massage

Scheduler link:

[https://dev.galeido.com/~carmen.negulescu/testcomplete\\_branch/public/scheduler/11811158655875f3c82f09697157437232508?staff=18045781815876156bc343591534](https://dev.galeido.com/~carmen.negulescu/testcomplete_branch/public/scheduler/11811158655875f3c82f09697157437232508?staff=18045781815876156bc343591534)

By pressing this URL, you will have quick access to the selected user's availability in the web form:





## Marianne Edwards

Massager  
**FLOWER SALON SPA**

Lorem Ipsum is simply dummy text of the printing and typesetting industry.

TIME  
selected time

DETAILS

JANUARY 2017						
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	31				

8:00	8:30	9:00	9:30	10:00	10:30	11:00
11:30	12:00	12:30	13:00	13:30	14:00	14:30
15:00	15:30	16:00	16:30	17:00	17:30	18:00

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Postbus 127. 8250 AC Dronten The Netherlands  
phone: +31 321 701 777 | fax: +31 851 030 010  
[support@qaleido.com](mailto:support@qaleido.com)  
<http://www.qaleido.com>

