

KiBook User Manual - Everything about KiBook

Help and Support for KiBook Customers

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About KiBook

KiBook was originally written as a no-thrills alternative to other online booking systems. Over the years it has grown with it's userbase, expanding it's featureset all the while.

KiBook aims to cover your needs and make managing your appointments and clients much easier.

Getting Started - Sidebar

Buttons

All you need to know to get up and running.

Getting Started - Sidebar Buttons

Welcome

Welcome to KiBook!

If you need to get in touch with us for anything at all please email - kibookcouk@gmail.com

We'll happily help you with anything you may need! We have sent a welcome email so please check that out.

Enjoy!

The Dashboard

Dashboard screenshot

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[Home! it's a good feeling.](#)

The KiBook dashboard is probably the screen you'll see most when using the system, it's your portal to everything KiBook can do. We try to keep the dashboard easy to read and follow, but we realize there's a lot going on so let's start at the top!

The Toolbar

The toolbar is always present in KiBook. it gives access to core functionality you might want to be able to access at a moments notice.

(left from right)

The 'Burger' Icon

The 'Burger' icon can be used to toggle the sidebar size from collapsed to expanded. Useful if you're on a smaller screen.

Paint Drops

The paint drops button is used to select a different dashboard theme, this is just for preference and doesn't effect what your customers/clients see.

Search

Hopefully this one is pretty self explanatory! But this handy button brings up the system-wide search overlay, which can be used to search your entire account.

Messages

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Alerts

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User Area

The Sidebar

The sidebar is also going to stick around while you're on KiBook. It's your main navigation hotspot when browsing the system or just admiring your busy calendar

Business Area

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Dashboard Shortcut

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Business Settings

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Booking Settings

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Customization

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Store Settings

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System Settings

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Staff Settings

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Help

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The Panels

Ah, the panels. These change depending on what page of the system you're on. On the dashboard you'll have some customizable default panels which will give you quick links to some of the more important areas of KiBook.

And lastly...

The Notes

Technically also a panel, the notes area is just a quick scratchpad you can use to jot down things in. That's all there is to it! Everything you type is saved as you type it, so no need to worry about waiting around.

Business Settings

[businessprofile.png](#)

Image not found for [Where it all begins!](#)

Your business profile is the key to your KiBook Kingdom. A nice tidy area to keep your essential business info stored.

Business Profile

Here you can update the name of your business and view your full KiBook URL.

The Save button applies to the whole screen, so don't click Save Changes if you aren't ready!

Contact Details

It's good to keep in touch, so ensure your customers (and booking system operators!) have your up-to-date contact information available.

Address

Simply place your Address in here, with a second line for any additional directions (i.e. parking, roadworks).

Booking Settings

Services

services.png

Image not found. [How may we help?](#)

The Services screen allows you what services you actually offer to clients. What you see on this screen will be a representation of what clients see when they book you, so it's good to keep it clean and concise!

Multiple Staff - After adding services we recommend checking these are assigned to the correct staff by navigating to the sidebar and clicking Staff Settings>Staff> Choose the staff member who's services you wish to update.

Add-On Services

localhost_4200_.png

Image not found. [How may we help?](#)

Add-On services are a way to offer extended appointment times and prices based on additional services you may offer. For example, a Nail Technician may offer Acrylic Nails as the **service** and Nail Art as the **add-on**. This will add additional time/ a new price onto the entire booking to allow for the optional extra.

Categories

[categories.png](#)

[Who doesn't love staying organized?](#)

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Categories are the overall types of appointments you or your team offer to clients, add new categories to group service types together and to make it easier for clients to find what they are looking for. Some users have categories per staff member too - just a tip!

Working Hours

[workinghours.png](#)

Image not found or type unknown [What a way to make a living](#)

Simply put, this is the screen that lets you or your team set their working hours. This is where you declare when you're open for business. Create one long time slot ranging from 9am-5pm for example or split your time up to suit you, leave any gaps for regular breaks!

Store Settings

Here is where you can set up an online shop if you choose to sell products online, this may include gift vouchers/gift cards and physical products. You may enter the price, photo and description of each product. You can also manage stock levels here to avoid issuing more products than you have in stock.

Products can be digital meaning they will not ask for the customers address during checkout. Only their contact name, email address and mobile number.

COMING SOON.

Digital products will automatically generate an email with a code that clients can use to redeem on their next KiBook booking. The code automatically appears in your Vouchers button on the dashboard - you can check in here to see if the voucher has been redeemed online.

System Settings

Stripe Settings

Clicking the System Settings button will allow you to view your personal Stripe API code. When you sign up for KiBook you are automatically taken to Stripe.com to set up your deposit account - this allows you to choose how often you wish to receive your deposits, which bank account to send them to and allows you to track your earnings. As you are aware your payments do not cross our path, they immediately go to Stripe and are then processed into your bank account. You do not have to edit this tab as the API code is already preset for you. If you have any further questions please contact Stripe directly. We also recommend installing the Stripe app on your phone as it can be easier to manage.

Message Settings

Again, you do not have to edit this tab as your messaging API keys are already pre-set for you. If you have any questions about this or need to change anything in regards to sending emails/texts please email us - contact@kibook.co.uk

Staff Settings

Staff

The staff tab will allow you to view all of your current members of staff, you can edit each staff members account in here if you have permission to do so and create passwords so each member has their own login (Please read next section for Permission.) Staff members can be added if you are on KiBook Fable or Novella - if you're not sure email us contact@kibook.co.uk. These are multi user accounts, you may add members of staff, remove them or edit their accounts to set which services they offer. If a new service is added please ensure you update the staff members to choose who offers these services and who doesn't.

Permissions

In permissions you can create new categories such as Admin - this could be for the business owner so they have full access to all areas of the KiBook account. Assistant could be used so that staff members are restricted, it may be that they cannot view reports or payment records, they may be unable to change details of other users and could access their own calendars only. This is all completely customisable and is entirely your decision how you choose to use it.

Working Hours

[Click here to find out more about setting up working hours and specific date hours.](#)

Emails

Email Settings

Message Templates

If you click Customization on the left task bar then Message Templates you will be taken to a screen which will allow you to edit your customer emails.

- Booking Email

The booking email is received by customers as soon as their appointment has been approved. This email contains their order, confirmation date/time, remaining balance and shows the address of where the appointment will take place.

-Cancellation Email

This email will send to customers only after you click Cancel on their appointment screen via the Schedule Calendar. These are manually sent to give you the option as to whether or not you want your customers to receive cancellation emails.

-Checkout Email

Checkout emails are manually sent after clicking Checkout on the clients appointment screen via the Schedule Calendar. Customers have found it useful to include their review pages (facebook, google+, trust pilot) on the checkout emails to improve ratings. For example; Thank you for subscribing to KiBook. Please review us here to let us know how we did -

<https://uk.trustpilot.com/review/www.kibook.co.uk>

Payments

When customers book appointments they enter their card details into KiBook. These details are saved on file in order to take **manual payments** with the customers consent. You may use this function to charge customers at the end of their appointments - payment is taken through Stripe so you will not receive this money until your Stripe deposit dates.

You may also use this function to **manually charge** anyone who breaches the terms and conditions agreed by KiBook. When booking an appointment customers are shown the terms and conditions written specifically for your business (please update this in the Customization tab) once completing their online booking the terms have been agreed. If your business has a lateness, cancellation or no show policy this should be clearly outlined in your terms and conditions. You may only take the exact fee owed to your business - you **cannot** add any additional fees on top of this.

Cancellations

Cancellation blocks, cancellation payments, cancellation emails etc.

Cancellation Calendar Time

Slots

If you cancel a client's appointment on your calendar screen this will send a cancellation email to the client and will turn the block red. The cancelled time slots remain on your calendar in red in case you have to refer back to this booking at any time in the event of a no show/late client.

You can create a new time slot beside the red block so that customers may book this time slot again. You can do this by clicking on your calendar and creating a new slot, you may drag this into the correct time and can expand or decrease a time slot by simply clicking on it and dragging it.

Cancellation Emails

Cancellation emails are sent when you manually click a client's time slot and cancel it. The email will contain a message chosen by you in the system customization screen.

Cancellation emails are **only** sent if you manually click cancel on your own terms.

Appointments

Viewing, editing, cancelling, payments, reminders and check outs.

Appointments

Appointments Calendar

The Appointment button on your Dashboard will allow you to view your calendar. In here you can view any booked appointments, available time slots and annual leave.

Cancelled Appointments

Should you need to cancel an appointment you would enter the Appointments panel, find the appointment/s which must be cancelled. By clicking on an appointment you have action buttons allowing you to checkout, edit and cancel. Clicking cancel will send a cancellation email to the customer letting them know their appointment has been removed. We recommend leaving a note on the cancelled appointment as a reminder as to why this was removed.

Cancelled appointments will remain on the booking system as a red block, this block remains so you may refer back to this booking at any time.

If an appointment has been cancelled due to a late cancellation or no show, you may charge the remaining balance by taking a manual payment - also shown on the appointment screen.