

REMINDER DIARY

Quick Reference Guide

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Table of Contents

Creating your account.....	3
Using the Today Screen.....	5
Making a Booking.....	6
Repeated Bookings.....	8
Canceling Bookings.....	9
Your Account.....	10
Your Clients.....	11

Creating your account

Creating a Reminder Diary account is quick, easy and free! Simply click one of the links from our home page. On signing up for an account, all you will need is your business name, address, telephone number and email address. We also ask you to specify your timezone so that we send your reminders at the right time and also a secure password which you shouldn't share with anyone else. You don't need a credit card at any time during the sign up process as we do not charge for using the booking system. You will only need a payment method when purchasing SMS/text message credit which you can do at any time.

CREATE ACCOUNT

Your Business Name:

What Kind of Business?:

Address 1:

Address 2:

District:

Town / City:

Country:

Time Zone:

Postcode/Zip Code:


Telephone Number:

Email Address:

Password:

Repeat Password:

How did you find us:



Enter Security Code Above:

I have read and agree with the [Terms Of Use](#)

Once you have entered your details on the initial form – you have effectively completed your sign up, it is that easy! The next section will ask you to check you are happy with the default values we have set for you.

REGISTRATION COMPLETE

Congratulations! You are now the latest member of Reminder Diary. Please review your current settings and select whether you would like to change them.

Opening Time: 9:00 AM
Closing Time: 17:00 PM
Appointment Length: 10 minutes

Single diary. Individual staff members not specified.

Would you like to amend these settings before starting to use Reminder Diary? (you can also change them later)

Yes
 No

This includes the opening and closing times of your business, the length of each booking and also whether you would like multiple diaries if you have more than one member of staff. If you are happy with the default settings, simply click **Submit**. Alternatively, select **Yes** if you would like to make amendments and then click **Submit**. For this example we will assume you are happy with the

defaults. If you want to make changes, view the relevant sections of this document to see details on changing your opening hours and also changing staff settings.

Once you have completed sign up, you will be presented with the **Today Screen** and can start to make bookings right away.

Using the Today Screen

The Today Screen is a snapshot of bookings for any day you have selected on the calendar date picker. By hovering over a customer name when a booking has been made, you are able to view more details about that customer and also any notes you may have made about the booking. From the Today Screen, you are also able to make new bookings, create/edit any notes you have for that day and also navigate to other parts of the system.

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Monday, June 29, 2009 **System Navigation** → [Your Clients](#) | [Your Account](#) | [Log Out](#)

Your SMS credit is 0. To purchase more, [click here](#)
Your SMS credit is getting low - purchase more to avoid stopping SMS reminders

Jan 2009 Go

June 2009
Sun Mon Tue Wed Thu Fri Sat
31 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 1 2 3 4
5 6 7 8 9 10 11

Back to Today
Print Appointments

Today's Notes

[Edit Note](#)

Time	Telephone	Book
9:00		Book
9:15		Book
9:30	SMS/Text Message Credit	Book
9:45		Book
10:00		Book
10:15		Book
10:30		Book
10:45		Book
11:00		Book
11:15		Book
11:30	Notes for today	Book
11:45		Book
12:00		Book
12:15		Book
12:30		Book
12:45	Make a booking	Book
13:00		Book
13:15		Book
13:30		Book
13:45		Book
14:00		Book
14:15		Book
14:30		Book
14:45		Book
15:00		Book

In the left hand pane, you will also see buttons for jumping back to the current day (if you have navigated away from it) and also an option for Print Appointments. This is useful when you want to take a printer friendly version of the diary away with you.

At the top of the screen you will be shown your current SMS/Text Message credit. This will decrease each time a reminder is sent from your account. You will also see an easy access link next to it for purchasing additional credit.

Making a Booking

To make a booking, simply select the date from the calendar at the top left and then select a time slot for the booking (if the time slot you want isn't shown, make sure you have set the correct opening hours and interval length in the **Your Account** section. You can read more about it later in this document). Once you have selected a time slot for the booking, click the **Book** link. You will then be taken to a screen to select the client you want to book into the slot. If you haven't created any clients, the following screen will display "No Clients Found". Click the **Create New Client** button.

CLIENT SELECTION

Please select a client from your list or create a new one.

[Create New Client](#) [<< Back To Today](#) Search: [Go](#) [Reset](#)

No clients found

This will take you to the client creation screen. Ensure you enter all their information correctly (especially their telephone number) and then click the **Next >>** button. On your next return to this screen, you will see the client you have previously entered and be able to select them using the **Select** link. This means you only have to enter your client details once. There is also a search facility if you have a number of clients.

CREATE NEW CLIENT

Title:

First Name:

Last Name:

Client Address:

Client Country:

Client Telephone: (include area code eg. 07770 123456 - do not use country code)

[Next >>](#) [Cancel](#)

You will then be presented with a series of options regarding the booking and SMS/text message reminder you might want to send. These details include:

- A confirmation of the customer details and the date/time of the booking.
- An option to enter any notes about the appointment
- An option of whether to send an SMS/text message reminder
- A selection of the message to be sent (the defaults for this can be set in the **Your Account** screen)
- An option of whether you include the day and time in the reminder message (this is a useful option for general reminders of immunization/vehicle MOT service reminders for example where an appointment has yet to be booked).

- A selection of when you want the reminder to be sent (the default value can be set in **Your Account** screen
- A choice of whether you want the appointment repeated daily, weekly, monthly or yearly and also the option to set an expiry date of when you would like the repeat to end.

A typical example of a reminder message might be:

“Don’t forget you have an appointment with <your business name> tomorrow at 9:15. Any queries, please call <your business telephone number>”

This may seem like a number of different options initially, but once you have set your defaults it will become a quicker process.

REMINDER DIARY
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BOOK APPOINTMENT

Please confirm the appointment details and add any appointment notes.

Title:	Mr
First Name:	Joe
Last Name:	Bloggs
Client Address:	10 The Road
Client Telephone:	07771123456
Date:	Monday, June 29, 2009
Time:	11:45
Appointment Notes:	<div style="border: 1px solid #ccc; height: 30px; width: 100%;"></div>

Send SMS Reminder:

Message to send: Don't forget you have an appointment with

Tick here if you don't want to include the day and time in the reminder message

Send the reminder: One day before the event

Tick here if you want the booking to be repeated

Please select the repeating pattern

This time every day (Daily)

This day/time every week (Weekly)

This date/time every month (Monthly)

This time/date every year (Yearly)

Tick here if you want your repeated event to expire

Create Appointment
Cancel

Once you click **Create Appointment** you will be returned to the **Today Screen** where you will see your booking listed in the correct time slot. The same time slot will still be available if you want to remind multiple customers of an appointment or event at the same time.

Repeated Bookings

There may be circumstances where you wish Reminder Diary to automatically repeat a booking for you. This means you only have to insert the booking once and it will not only appear at the set intervals in the diary, but will also automatically send a reminder message at these intervals (saving any preferences you have set for the reminder message).

To create a repeated booking, follow the usual method of creating a booking and then tick the checkbox which asks if you want the booking repeated. The following options then apply:

- Daily – will repeat the booking and reminder (if selected) every day at that time
- Weekly – will repeat the booking and reminder (if selected) on the chosen days every week at that time
- Monthly - will repeat the booking and reminder (if selected) on the chosen day of the month at that time for those months selected. **BE CAUTIOUS OF CHOOSING 30th AND 31st AS THESE DATES DON'T EXIST EVERY MONTH**
- Yearly – will repeat the booking and reminder (if selected) on the chosen day of the year, every year at that time

You can identify repeated events in the today screen by a (DR) suffix on the time for daily repeats, a (WR) suffix on the time for weekly repeats, an (MR) suffix on the time for monthly repeats and a (YR) suffix on the time for yearly repeats as demonstrated in the image below:

Time		Telephone		
9:00			Book	
9:15			Book	
9:30			Book	
9:30 (DR)	Mr Joe Bloggs	07771123456		Cancel
9:45			Book	
9:45 (WR)	Mr Joe Bloggs	07771123456		Cancel
10:00			Book	
10:00 (MR)	Mr Joe Bloggs	07771123456		Cancel
10:15			Book	
10:15 (YR)	Mr Joe Bloggs	07771123456		Cancel
10:30			Book	

Canceling Bookings

If you wish to cancel a booking from the diary, simply click **Cancel** on the booking slot. You will then be shown a warning message that cancelling the booking will also cancel any repeated bookings.

Time		Telephone		
9:00			Book	
9:15			Book	
9:30			Book	
9:30 (DR)	Mr Joe Bloggs	07771123456		Cancel
9:45			Book	
10:00			Book	
10:15			Book	
10:30			Book	
10:45			Book	
10:45	Mrs Josephine Bloggs	07771123456		Cancel

Once a booking has been cancelled, it will disappear from the diary.

Your Account

The **Your Account** section of the system allows you to change a number of parameters to personalize your user experience of Reminder Diary. You can access **Your Account** section from the link at the top of the **Today Screen**. The sections within **Your Account** include:

- Purchase Text Credit – here you can increase your SMS/text credit for sending reminders. The text credit does not have an expiry date and will therefore not decrease unless a reminder has been sent. Simply select the amount of credit you would like to purchase. You will then be asked for your payment details at our secure third party provider and on returning to Reminder Diary, your credit will be increased. We do not store any details about your credit/debit card.
- Change Your Password – if you feel your password may have been compromised in any way, change it immediately with this tool. Simply enter your current password and the new one you would like to use.
- Message Settings – here you can select the default message which is always pre-selected when creating an appointment. You can also set the default “time before” a booking that the reminder message is sent. The final option is to select whether your telephone number is used in the message.
- Diary Options – here you can select the opening hours of your business and also the interval length of each booking. This will affect the view of the diary.
- Staff Settings – if you have multiple members of staff within your business/organization who see different clients, you can have separate diaries for each of them. An initial staff member is added to your account called “Not Specified”. Edit this staff member name if you have others to add. You will then be able to select your staff member from the **Today Screen** and book clients into the slots for them. Clients and SMS/text message credit is shared amongst all the staff members.
- Your Clients – this is explained in more detail in the next section
- Edit Account Details – if any of your business details change (especially your telephone number), edit them in this section.

Your Clients

The **Your Clients** section of the system is accessible from both the **Today Screen** and also the **Your Account** section. Both links take you to the same place. Within the **Your Clients** screen you can perform the following actions:

- Edit you client details including their name, address and telephone number
- Delete clients – NOTE: this will also cancel any associated bookings and outstanding reminder messages you have for the client

Clicking on a client will enable you to see their details, view their upcoming bookings and also view any repeated bookings which have been set for them. You can also cancel any bookings associated with the client from here.

A facility has also been made available for adding notes for a client. This might be additional information which doesn't fall under a specific booking. The adding of new clients is only done when creating bookings for them.

REMINDER DIARY

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CLIENT DETAILS

<< Back

Title: Mrs
First Name: Josephine
Last Name: Bloggs
Client Address: 10 The Road
Client Telephone: 07771123456

UPCOMING BOOKINGS

Coming Month

Booking Date	Notes	
01 Jul 2009 10:30		Cancel

REPEAT BOOKINGS

No Repeated Bookings

CLIENT NOTES

Create Note

No client notes added