CalendarsMaster

User Manual

www.CalendarsMaster.com

Table of Contents

CalendarsMaster

Getting Started

After logging in, you'll land on your Dashboard. From here, you can create booking campaigns, manage appointments, and track your booking activity. The sidebar on the left is your main navigation—use it to move between different sections.

Your main tasks will be:

- **Creating campaigns -** Set up booking widgets with your availability
- **Managing appointments -** Review, confirm, or cancel bookings
- **Customizing your widget -** Match colors, logo, and text to your brand
- **Connecting integrations -** Sync with Google Calendar and external services

The features available to you depend on your account plan. Some options may be limited or unavailable based on your subscription level.

Your Dashboard

The Dashboard gives you a snapshot of your booking activity at a glance. It's designed to show you what needs attention right now.

Statistics Cards

At the top, you'll see four key metrics:

- **Total Campaigns** - Number of booking widgets you've created
- **Appointments This Month** - All bookings received this month
- **Upcoming Today** - Appointments scheduled for today
- **Pending Confirmation -** Bookings waiting for your approval

Click any card to jump directly to the relevant section.

Recent & Upcoming Appointments

Below the stats, two lists keep you informed:

Upcoming Appointments shows your next scheduled bookings with:

- Customer name and campaign

- Scheduled date and time
- Current status (confirmed, pending)

Recent Bookings displays newly received appointments with:

- Customer name and status badge
- Time since booking ("2 hours ago")
- Quick access to appointment details

Quick Actions

Three buttons let you jump to common tasks:

- **Create New Campaign** - Start a new booking widget
- **View Appointments** - See all your bookings
- **Calendar View** - Visual schedule overview

Creating Campaigns

A campaign is a booking widget that customers use to schedule appointments with you. You might create different campaigns for different services, locations, or appointment types.

Creating a New Campaign

1. Click **Campaigns** in the sidebar
2. Click the **Create Campaign** button
3. Fill in the basic information:
    - **Name** - Internal name for this campaign (e.g., "Consultation Bookings")
    - **Slug** - URL-friendly identifier, auto-generated from name
    - **Status** - Start with Draft while configuring
    - **Language** - Widget display language (English, German, French, Hebrew)
    - **AI Integration** - Optional: select to enable chat booking
4. Click **Create**

You'll be taken to the campaign editor with multiple tabs for detailed settings.

Campaign Statuses

- **Draft** - Not visible to customers, use while setting up
- **Active** - Live and accepting bookings
- **Paused** - Temporarily disabled, keeps all settings

Campaign Actions

From the campaigns list, click the menu on any campaign to:

- **View Campaign** - See details and recent appointments
- **Edit Campaign** - Open the full configuration editor
- **Embed Code** - Get code to add widget to your website
- **Edit Schedule** - Configure availability settings
- **Chat Logs** - View AI conversation history (if AI enabled)
- **Email Templates** - Customize notification emails
- **Delete** - Remove the campaign permanently

Campaign Appearance

The Appearance tab controls how your booking widget looks to customers. A consistent visual style builds trust and makes booking feel professional.

Color Presets

Quick-start options that apply a complete color scheme:

- **Default Blue** - Clean, professional look
- **Dark Mode** - Sleek dark background
- **Green Nature** - Fresh, natural feel
- **Purple Modern** - Contemporary style
- **Orange Warm** - Friendly, inviting
- **Rose** - Soft, elegant

Custom Colors

Fine-tune individual colors with the color picker:

- **Primary Color** - Buttons and interactive highlights
- **Secondary Color** - Accents and secondary elements
- **Background Color** - Widget surface color

- **Text Color** - All readable text

Enter hex values directly or use the visual picker. The preview updates instantly so you can see changes before saving.

Logo Settings

Add your logo to appear at the top of the booking widget:

Upload a File:

1. Select "Upload File" option
2. Click "Choose Logo" or drag a file
3. Supported formats: JPG, PNG, SVG, WebP (max 2MB)

Use External URL:

1. Select "External URL" option
2. Paste the full URL to your logo image
3. Ensure the URL is publicly accessible

Click "Remove Logo" to delete an existing logo.

Form Fields & Widget Text

The Form Fields tab determines what information you collect from customers and how your widget text appears.

Form Field Configuration

Email Field:

- Always available
- Toggle "Required" on/off

Phone Field:

- Toggle "Enabled" to show/hide
- Toggle "Required" if enabled

Message Field:

- Toggle "Enabled" to add a notes field
- Toggle "Required" if enabled
- Set custom label (e.g., "Special Requests")
- Set custom placeholder text

Either email or phone must be enabled—you need at least one way to contact customers.

Widget Text Customization

Customize every piece of text customers see:

Headings:

- Heading (e.g., "Book Your Appointment")
- Subheading (e.g., "Select a date and time that works for you")

Step Labels:

- Step 1 label (e.g., "Select a Date")
- Step 2 label (e.g., "Your Details")
- Selected appointment label
- Slots available text

Form Labels & Placeholders:

- Full Name label and placeholder
- Email Address label and placeholder
- Phone Number label and placeholder

Button Text:

- Back button
- Continue button
- Submit button
- Submitting state button

Messages:

- Success heading
- Your appointment label
- No dates available message

- Error messages (generic and network)

AI Chat Settings

If you've selected an AI Integration, the AI Chat tab lets you configure the conversational booking experience.

AI Configuration

- **AI Model** - Select from available models configured by your admin
- **AI Language** - Choose response language (45+ options including English, Spanish, Chinese, Hindi, Arabic, German, French, Japanese, and many more)

System Prompt

The system prompt tells the AI how to communicate. Three quick templates are available:

- **Professional** - Formal business communication
- **Friendly** - Casual, approachable tone
- **Concise** - Brief, efficient responses

Or write your own custom prompt to match your brand voice.

Chat Widget Text

Customize chat-specific elements:

- **Assistant Name** - Display name for the AI
- **Status Text** - Online indicator text
- **Welcome Message** - First message customers see
- **Input Placeholder** - Text in the message input
- **Booking Complete Message -** Shown after successful booking

Booking Flow Text:

- Ready to Book header
- Confirm Button text
- Booking in Progress message
- Booking Success message

Form Field Labels (in chat):

- Name, Email, Phone, Date, Time labels

Error Messages:

- Generic chat error
- Network error
- Booking error

Setting Up Your Schedule

Your schedule determines when customers can book appointments. Click **Edit Schedule** from any campaign to configure availability.

Appointment Settings

- **Slot Duration** - Length of each appointment: 15, 30, 45, 60, 90, or 120 minutes
- **Buffer Time -** Gap between appointments: 0, 5, 10, 15, or 30 minutes
- **Booking Window -** How far ahead customers can book: 14, 30, 60, or 90 days

Weekly Hours

Set your regular working hours for each day:

1. Toggle each day on/off
2. Set start time and end time
3. Optionally add break times (e.g., lunch from 12:00-13:00)

Example: Monday-Friday, 9:00 AM to 5:00 PM, with lunch break 12:00-1:00 PM.

Schedule Templates

For complex availability, create templates that generate dates automatically:

Daily Template:

- Same hours repeat every day
- Set date range for when template applies

Weekly Template:

- Different hours for specific days of the week
- Great for varying schedules

Custom Template:

- Define specific dates and times
- Useful for special events or one-off availability

Template Settings:

- Start and end times
- Slot duration (15-480 minutes)
- Max bookings per slot (1-100)
- Days of week (for weekly templates)
- Start and end date range

After creating templates, click **Generate Dates** to create bookable slots.

Managing Individual Dates

You can manually add, edit, or remove specific date slots. Each slot shows:

- Date and time range
- Maximum bookings allowed
- Current bookings count
- Available/unavailable toggle

Managing Appointments

Navigate to **Appointments** in the sidebar to see all your bookings across campaigns.

Appointment List

Each appointment shows:

- **Customer Info** - Name, email, phone
- **Campaign** - Which booking widget they used
- **Date & Time** - Scheduled appointment time

- **Status** - Current appointment state
- **Created** - When booking was made

Filtering Appointments

Use the filters at the top:

- **Search** - Find by customer name or email
- **Status** - All, Pending, Confirmed, Cancelled, Completed
- **Campaign** - Filter to specific campaign

Appointment Statuses

- **Pending** - New booking awaiting your confirmation
- **Confirmed** - Approved and scheduled
- **Cancelled** - Appointment will not happen
- **Completed** - Past appointment that occurred

Changing Status

1. Find the appointment in the list
2. Click the status dropdown
3. Select the new status
4. For cancellations, you can add a reason

What happens on status change:

When you **confirm**:

- Confirmation email sent to customer (if enabled)
- Syncs to Google Calendar (if connected)
- Webhook triggered (if configured)

When you **cancel**:

- Cancellation email sent with your reason (if enabled)
- Removed from Google Calendar
- Slot becomes available again

AI Insights (if available)

Some appointments show additional data:

- **No-Show Risk** - AI prediction of likelihood customer misses appointment
- **Satisfaction Rating** - AI assessment of booking experience quality

---

Calendar View

Click **Calendar** in the sidebar for a visual overview of your schedule using a full calendar display.

Color Coding

Appointments appear as colored blocks:

- **Green** - Confirmed
- **Orange/Yellow** - Pending
- **Red** - Cancelled
- **Gray** - Completed

Viewing Details

Click any appointment to see:

- Customer name, email, phone
- Campaign name
- Status badge
- Customer message (if provided)
- No-show prediction (if AI enabled)
- Satisfaction rating (if AI enabled)

Filtering

Use the campaign dropdown to show only appointments from a specific campaign.

Email Templates

Customize the notification emails sent to customers. Navigate to your campaign and select **Email Templates** from the menu.

Available Templates

- **Booking Created** - Sent immediately when customer books
- **Booking Confirmed** - Sent when you confirm the appointment
- **Booking Cancelled** - Sent when appointment is cancelled (includes reason)
- **24-Hour Reminder** - Sent one day before appointment
- **1-Hour Reminder** - Sent one hour before appointment

Editing Templates

1. Select the template type to edit
2. Choose the language version (English, German, French, Hebrew)
3. Customize:
   - **Subject Line** - Email subject
   - **Heading** - Main heading in email body
   - **Body** - Email content
4. Click **Save**

Click **Reset** to restore default template content.

Integrations

The Integrations tab connects your campaign to external services.

Google Calendar

Sync appointments to your Google Calendar automatically:

1. Click **Connect Google Calendar**
2. Authorize with your Google account
3. Configure sync settings:
   - **Sync Mode: All** - Every appointment syncs immediately
   - **Sync Mode: Confirmed** - Only confirmed appointments sync
   - **Sync Mode: None** - No automatic sync
4. Toggle **Add Google Meet Link** to include video meeting links

When connected, confirmed appointments appear in your Google Calendar with customer details. Cancelled appointments are automatically removed.

iCal Download

- Toggle **Enable iCal Download** to let customers download .ics files
- Toggle **Include in Email** to attach calendar files to confirmation emails

Customers can import the .ics file into any calendar application.

Webhooks

Send appointment data to external services like Zapier, Make, or n8n:

1. Toggle **Enable Webhooks**
2. Enter your **Webhook URL**
3. Copy the **Webhook Secret** for verification
4. Select which events trigger webhooks:
   - Appointment Created
   - Appointment Confirmed
   - Appointment Cancelled
   - Appointment Completed
   - Appointment Rescheduled

Webhooks send JSON data about each event to your endpoint.

Email Notification Settings

Configure sender information:

- **From Name** - Name shown in email
- **Reply To** - Email address for replies

Toggle individual notification types on/off:

- Booking Created
- Booking Confirmed
- Booking Cancelled
- 24-Hour Reminder
- 1-Hour Reminder

AI Features

Optional AI-powered analysis:

- **No-Show Prediction -** Identify appointments with higher cancellation risk
- **Satisfaction Rating -** Gauge customer experience from chat conversations

---

Embedding Your Widget

Get code to add your booking widget to any website.

Getting Embed Code

1. Go to **Campaigns**
2. Click the menu on your campaign
3. Select **Embed Code**

Iframe Embed

Copy the iframe code to embed the full booking form:

```None
<iframe src="..." width="100%" height="600"></iframe>
```

The widget automatically uses your appearance settings (colors, logo, text).

Popup Widget

Copy the script to add a popup button:

```None
<script src="...widget.js"></script>
<script>
  window.BookingWidget.init({ campaignSlug: 'your-slug' })
</script>
```

Customers click a button to open the booking widget in a popup.

Chat Widget (AI Integration)

If AI is enabled, copy the chat script to add a chat bubble:

```None
<script src="...chat-widget.js"></script>
```

A chat icon appears that customers click to start a booking conversation.

Chat Sessions

View AI conversation history for campaigns with chat booking enabled.

Viewing Sessions

1. Go to your campaign
2. Click **Chat Logs** from the menu
3. Browse the list of conversations

Each session shows:

- Session timestamp
- Whether a booking was made
- Conversation status

Reading Transcripts

Click any session to see the full conversation:

- Customer messages
- AI assistant responses
- Booking details (if completed)

Managing Sessions

You can delete old chat sessions. Deleting a session removes the conversation history but doesn't affect any appointments that were created.

Final Note

Don't worry if parts of this feel a bit confusing at first. That's completely normal. Just take your time and go through the steps again, it will start to click quickly.

The best way to learn this properly is by doing it yourself. Once you've done it once, it becomes much easier.

If you do get stuck, support is always here to help. Just drop us an email and we'll guide you in the right direction support@calendarsmaster.com

You've got this 👍