



CALENDARISTA

A WORDPRESS BOOKING PLUGIN

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<https://www.calendarista.com>

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A WORDPRESS BOOKING PLUGIN

Calendarista adjusts to various business types. You will soon discover that this is an all-in-one booking solution that is easy to use with an intuitive interface.

The possibilities with this plugin are endless.

Forget about hosting in the cloud and paying monthly fees. This is installable software and there are no additional costs involved.

Best yet, the system becomes an integral part of your website. By adding your very own booking system directly into your website, your customers will enjoy a pleasant and professional booking experience enabling you to maximize customer retention.

Allow us to introduce you to Calendarista, a universal booking system that has several advanced features but yet is quite elegant and simple to use.

The following pages will allow you to discover this plugin thoroughly so that you may become a professional Calendarista!

ENDLESS POSSIBILI- TIES

Hotel, Car rental,

Fitness instructor,

Meetings, Apartment

rentals, Vacation

property, Teaching

lessons, Parking,

Taxi, Bus, Tour

agency, Hair dresser

salon, Transportation,

Appointment

reservation etc...

BECOMING A CALENDARISTA

GETTING STARTED

Everything takes place in the “Services” page. This is your workshop for making your date and time available and ready for consumption through the web. But let’s do this in steps. We will be ignoring self-explanatory settings and focus on the basics that we need to get you up and running fast.

What is an availability?

In Calendarista, an availability is the date and time you are available to provide a certain service. An availability can be a single date or time you are available or one that repeats daily, weekly, monthly, yearly and so forth.

However, in order to setup your availability, first you will need to define a service. You need to have a clear idea of the type of service you are offering. This is important as it will determine the type of date and time selection controls the customer will see. We go into more detail on this in the section that follows.

SERVICES

Services can be created from the “Services” page. The page is subdivided in tabs to allow the various settings that affect a service.

Service tab

1. Provide a name that describes your service. Please try to keep this short and descriptive as it may come handy when you have defined several services. This will enable you to quickly distinguish one from the other at a glance. Additionally, it is possible to list services in a dropdown list in the front-end. In that case, this same name will be used so remember to keep it short and descriptive.
2. Select a mode for your service. This will dictate the way Calendarista behaves in the front-end. Remember you are simply selecting the behavior. You will be able to set the actual date(s) and how these repeat later when setting the availability.
 - a. **Single day**
 - i. In the front-end, the booking calendar will allow selecting only a single day. This mode does not support time slots.
 - b. **Single day and time**
 - i. In the front-end, the booking calendar will allow selecting one or more timeslots. By default, only a single slot selection is allowed. To enable multiple slot selection, this is a separate setting that needs to be enabled elsewhere.
 - c. **Single day and time range**
 - i. In the front-end, the booking calendar will allow selecting a single day and will include selection list for start - end time. The lists are intelligent to adjust to user selection. If Start is for 4:00pm, then End will allow selecting a slot after 4:00pm and not before.
 - d. **Multi date range**
 - i. In the front-end, the booking calendar will allow selecting multiple dates in a range. *This mode allows you to also set a special cost if x number of days or more are selected.*
 - e. **Multi date and time range**
 - i. In the front-end, the booking calendar will allow selecting multiple dates in a range and in addition, the start date and end date will include a companion start time/end time list box for time. *This mode allows you to also set a special cost if x number of days or more are selected.*
 - f. **Multi date range with Changeover**
 - i. In the front-end, the booking calendar will allow selecting multiple dates in a range. The start and end dates are your changeover days and will be denoted on the calendar accordingly. This is a typical setup for hotels where customers check-out in the morning and check-in during the afternoon and vice versa.

g. Package

- i. In the front-end, the customer is presented with a list box containing one or more packages. A single package is an availability containing one or more days. For example, you may have an availability that starts on 01/12/2017 and repeats weekly every Monday until 01/12/2018. You only need to set the number of days to include in the package and optionally seat no. of seats. More on this in the section titled *Packages*.

h. Round trip

- i. In the front-end, the customer will be allowed to select a Departure date and Return date. Supports setting a separate cost for return. Return date is a required field by default but can be made optional.

i. Round trip with time

- i. In the front-end, the customer will be able to select a Departure date and time along with the Return date and time. Supports setting a separate cost for return. Return date and time are required fields by default but can be made optional.

j. Single day and time with padding

- i. In the front-end, the customer will be able to select a date and time. Time can include paddings, which allows you some preparation time between bookings.

This covers the necessary settings required to create a service. Now click the “Create New” button and load the “Availability” tab covered in the next section.

Note

Modes that include *multi date range*, support special features such as min/max day booking restrictions you can place in addition to property turn over days to allow you some prep time between bookings and booking notice, which restricts from bookings taking place too soon or to restrict from booking too far into the future. You will also be able to control what days of the week it is possible to check-in and check-out.

Availability Tab

This is where you can setup the calendar, including the days and time slots you are available and the cost if applicable among other options. Multiple availabilities can be created. In this case, each availability will be listed in a list in the front-end. We will skip self-explanatory and optional settings so that we can focus on the main settings you will need.

Note that most of the availability settings depend on the service mode selected.

1. Provide a name for the availability. Make sure the name is short and descriptive. This will help you identify an availability quickly. The same name will also be used in the front-end in case you have created multiple availabilities.
2. Set the date and time your availability starts.
3. Seats can be set depending on the service mode. Not all modes support seats. Additionally, if the service supports timeslots, then you will be able to set seats per timeslot and the setting will be available separately when creating timeslots.
4. An image URL can be provided optionally. If you do provide one, it will display in the front-end when the availability is selected. This can be useful in cases where you want to display the picture of the person that owns the availability. *To set the images width and height refer the "Styles" section.*
5. Check "repeat", this will allow you to add days to your availability. If you do not check repeat, you will end up with a single day in your availability, which is the date you've setup in step 2. Checking "Repeat" will produce a dialog box where you can setup the repetition pattern.

Note that we will not go through the options in the "Repeat" dialog as these are all quite simple to guess what they do.

This covers the necessary settings required to create an availability. Now click the "Create New" button. Congratulations. You have just created your first service.

In case the service mode is one that includes timeslots, then you are not quite done yet. Head on to the "Timeslots" tab. We will discuss this in the next section.

SYNCHRONIZE AN AVAILABILITY

You can synchronize service availabilities. This is useful when the same appointment in one availability cannot be made in another and hence won't be available for booking.

First of all for this to work, you need to set a limited number of seats, i.e. seats have to be a value of 1 or greater.

1. Next, from the services - availability page, you need to select the availability.
2. Scroll down to the "Synchronize" section and expand it.
3. If you have more than 1 service or availability, you will see these listed.
4. Check every availability with which you want to sync.
5. Repeat this for each availability so that the sync is two-way.
6. Try making an appointment. You will see that the same appointment cannot be booked again on another.

Note: *Syncing only works across services of the same mode.*

PRICING SCHEME

Pricing scheme when selecting 2 or more days is available throughout the Multi date range, Multi date and time range and the Changeover service modes.

What this does is allows you to set a cost by number of days. For example, if you wanted to charge \$50 for 1 day, and for each additional day, scale it down this is possible. For each number of days that might vary, you insert the number of days and the cost.

A number of days not in the pricing scheme will inherit the default cost set on the availability. Otherwise the cost is overridden by what is set in the pricing scheme.

Note that you can also autogenerate a pricing scheme by setting a day range, for example if we wanted 3 - 6 days to cost \$150, the autogenerate will allow you to do this in one go instead of repeating the same thing 4 times, in this case 3, 4, 5, 6 with a cost of \$150.

The pricing scheme is also available within a season. If at a specific period you cost has to change you can create a season and set a pricing scheme accordingly.

Timeslots tab

If the service mode is one that supports time, then the time slots tab will display. This is where you generate time slots, set cost per time slot, add time slots manually and add time slots per day or by the week. But first ensure you have already created an availability otherwise you won't be allowed to setup time slots.

From the timeslots tab, select an availability. The time slots you will be creating will be for the selected availability only.

For instance, if you are running a dental clinic and have several dentists, then you will likely setup one availability per dentist. The timeslots generated will be the working hours of that particular dentist.

Dental clinic is only an example, and you are not confined to any specific type of business as the use case for Calendarista aims to be for the general use case, thus covering several scenarios.

Next choose "Create timeslot". If you select this option, you will be able to create time slots manually per specific day by date or week day.

1. Weekday
 - You may either select "Manual date selection", the default. This will allow you to target specific days by manual date entry or you can select a specific week day.
2. Cost
 - If your service supports payments, you will be able to set the cost for each time slot. Each time slot can have a cost. Not many booking plugins allow you this luxury.
3. Seats
 - You can now set the number of seats available for each time slot. Another luxury feature you shouldn't take for granted. Just keep in mind that not all service modes support setting seats so you may or may not see this option.

This can be tedious, so we suggest you try the autogenerate timeslots option first. You can then delete slots and add slots manually or edit a slot. A time saver.

On the other hand, if you decided to "Autogenerate timeslots", these are your options.

1. Weekday
 - You may either select "Manual date selection". This will allow you to target specific days by manual date entry or you can select a specific week day.
2. Start Interval
 - When time slots are split, the split will start at this time interval.
3. Time length
 - Time slots will be split based on the time length value.
4. Cost
 - If your service supports payments, you will be able to set the cost for each time slot. Each time slot can have a cost. Not many booking plugins allow you this luxury.
5. Seats
 - You can now set the number of seats available for each time slot. Another luxury feature you shouldn't take for granted. Just keep in mind that not all service modes support setting seats so you may or may not see this option.

Now click create. Your availability in the front-end calendar will show the time slots you created. Note, if in case your availability has changed for any particular day, you can deactivate slots the "Holidays" page.

Seasons

If cost depends on certain periods i.e. seasons, for example high season, low season etc, in this case you may setup one or more seasons.

1. First ensure payments are enabled on the service.
2. From the "Services - Seasons" page, select an availability and allow the page to reload.
3. Set a season start and season end date. This will be the duration of your season.
3. Set a cost. This can be either a fixed value or a percentage value. If setting a percentage value, this will be a percentage of the base cost set on the availability.
4. Select to either +Add or -Deduct. If choosing to add, the cost value set will add up to the base cost. Deduct will do the exact opposite.
6. If you want to target specific days of the week within the season start/end date range, then you may do so by checking the date by week day name.
7. Now click Create. You have just created a season. You may create more seasons. Just make sure these do not overlap with other seasons within the same availability.

Note that the service modes single day and time and the single day and time range do not support seasons. This is because they are timeslots based and timeslots in Calendarista already allow you to set the cost for any particular week day, week end, or a specific date of your choosing.

Guests tab

Guests will allow you to add one or more numbered lists that will appear right after a date/time selection. If group booking is enabled, then these will appear directly under the seats list.

By creating one or more guests, you will be able to enable your booking form to collect additional information from your customer, such as adults, children etc.

CREATING ADULTS AND CHILDREN SELECTION LIST

1. From the "Services - Guests" page, select an availability and allow the page to reload.
2. Set a label, in this case "Adults" and click the Add button.
3. From the list of guest fields section in the right pane, you will see your adult label. Click the Edit button.
4. From the Seats by number of guest(s) section, add the value 1 for Min. guests and 5 for Max. guests. This will display the values 1 - 5 in the adult's lists.
6. From the Cost by number of guest(s) section
 - a) Add the value 2 for Cost and 1 for No. of guests. Click the Add button.

b) Add the value 4 for Cost and 2 for No. of guests. Click the Add button.

c) Repeat until you reach 5 guests. This will set a cost for each adult selected.

7. It's done. If you need another guests section, this time "Children". Then repeat steps 1 - 6. You may add as many lists as you require.

Note that, for service modes that support group booking, such as Single day and the Single day and time or Package mode, you will be able to make a guest list depended on the number of available seats. For example, if there are 4 seats available, then you may want to allow selecting no more than 4 adults. This can be done from the Seats by number of guests section where you will find a seats field for each entry.

Remember, a guest can be anything that makes sense to your business. It does not necessarily have to be no. of adults or children.

Custom form fields tab

Not all businesses are alike and due to that we have created a custom form builder so that you can include custom fields to collect data from your customers. There are 6 HTML input fields to choose from. By default, options that you will likely not need to be concerned with are tucked away under the "Advanced" section.

A general rule of thumb as with most features in this plugin is to ignore options if they don't make sense to you. This probably means you don't require them at all.

TEXTBOX AND TEXTAREA

After selecting an element type of Textbox or Textarea, set a value for the "Label" field to indicate what to enter into the textbox. If the field is obligatory then check "This field is required" and click the "Create" button. Additional options described below.

1. Placeholder – Use this field to add a hint within the Textbox or Textarea
2. Match a valid URL – Check this box if you would like to collect a URL from the customer. This will provide a Textbox with validation to ensure the user has entered a valid URL. Note that this is available only for Textbox.
3. Allowed value – Select a value for further validating a Textbox. Note this is available only for Textbox.
4. Min length and max length – Provide a value to restrict the content of the value the user enters within the Textbox or Textarea.
5. Regex – Provide a Regex expression to validate the contents entered using regular expression syntax.

DROPDOWN LIST AND MULTI SELECT LIST

1. After selecting an element type of Dropdown list or Multi select list, set a value for the "Label" field to indicate what to select from the list. If the field is obligatory then check "This field is required".
2. Next set a comma separated list of options in the "Options" field. These are the values you want to show in the list. For example, setting *Apple, Grape, Banana* will add into your list all three fruits maintaining that order. The first value in the list will be *Apple* then *Grape* followed by *Banana*.

3. Next set a value for the first item. Following the previous example, since we have a list of fruits, we might want to set a value such as *Select a fruit*.
4. Next set a default value. Building on to the previous examples, if we wanted the *Banana* from our list of fruits to be selected by default, then we would add the value *Banana*.
5. A dropdown list and a multi select list are quite similar. The only difference is that a multi select list will allow your user to select multiple items by pressing CTRL key on the keyboard while clicking an item. Classic HTML 101, anybody that has learned to use the internet knows this.
6. Now click "Create".

CHECKBOX AND RADIO BUTTON

1. After selecting an element type of Checkbox or Radio button, set a value for the “Label” field to indicate what the list of checkboxes or radio button represent, for example *What is your favorite fruit?* If we require at least one item to be checked, then check “This field is required”.
2. Next set a comma separated list of checkbox or radio button items in the “Options” field. For example, setting *Apple, Grape, Banana* will add 3 checkbox or radio button items listed one under the other maintaining that order. The first value will be *Apple* then *Grape* followed by *Banana*.
3. Next click “Create”.

PLAIN TEXT

1. After selecting an element type of Plain Text, provide the content in the “Content” field. This allows you to insert plain text into your form.
2. Next click “Create”.

Common fields you will find that every element type supports are tucked away under the “Advanced” section and are as follows:

CSS class – Use this field to add a CSS class for additional styling

Show a separator after this field – Adds a horizontal line separator after the field.

Note after creating each field, you will find it listed in the right pane where you can edit a field to add amendments, delete the field or re-order by dragging and dropping.

Additionally, after creating each field, click the “New” button to exit the “Edit” mode and begin adding a new form field.

This completes our section on custom form fields. By using or more of these fields, you can collect any type of input from your users during the booking process.

You will be able to view the users input later in your back-end when a booking is made. The label value you set when creating each form field will be coupled with the users input, so make sure you set a meaningful label, one that will help you understand at a glance what the users input is.

Optionals tab

An unlimited number of optional items can be created. These can be used to supplement the booking with amenities, occupancy (single room, double room etc.), children or adults, facilities and so forth where each selection can carry an extra cost that adds up to the total amount.

Not only can these be used for additional cost but optional items can also be in limited quantity if you choose so.

In order to create optional items, first you need to create a group, after which you add optional items to it. This design will enable you to create an unlimited number of optional items that can be represented in a list of radio buttons, checkboxes, dropdown lists and multi select lists.

1. Set a group name. This name will also be used in the front-end as the heading for the optional items that follow, so try to keep it short, descriptive and to the point.
2. Set a display mode. The optional items you add to the group will be based on the display mode selected. So, for instance, if checkbox was selected, each optional will display as a checkbox item.
3. Choose how you want the cost of the optional calculated
 - i. *Add cost to total:* In this case if the cost of the optional is \$5, then \$5 is added to the total amount when the optional is selected.
 - ii. *Multiply cost by each selected day and add to total:* In this case, the cost of the optional will add up by the number of days selected. This is useful in case your booking allows selecting multiple days. So, if the optional was \$5 and 2 days were selected, it's going to be $5 \times 2 = \$10$ which is added to the total amount.
 - iii. *Multiply cost by each selected seat and add to total:* In this case, the cost of the optional will add up by the number of seats selected. This is useful if you allow group booking where the customer can select more than 1 seat. So, if 3 seats were selected and the optional costs \$5, then it calculates $3 \times 5 = \$15$ which is the sum that adds up to the total amount.
4. Now click the "Create" button. Groups are listed in the right pane where you can order them by drag and drop.
5. From the left pane, you can start adding new optional items to the group. Provide a name, cost and the quantity limit if that applies to you.
6. Now click "Add new optional". You will see it listed in the group in the right pane. To add more optional items, click the "new" button in the left pane and repeat.

As you can note, it is quite simple and intuitive to create optional items. Keep in mind that cost and quantity are not required fields, so provide them only if these values apply to what you are trying to achieve.

Maps tab

There are two types of maps you can create in Calendarista. The one we will discuss now are the simple maps. These only display a certain location and do not offer interaction. This allows you to show the location of the property for example.

1. Select the availability to which the map will apply. When this is the active availability in the front-end, the map will show.
2. Insert the address you want displayed on the map. This is normally the address of the asset being booked for ex. The property location. The input box supports autocomplete, however you may find it easier to zoom in on the map in the right pane and right click to select an area.
3. Select a styling for the map. If you do not provide a styling, the default google maps styling will be used.
4. Check display marker if you want a marker indicating the address you set in step 2 on the map. If you do not check this then only the area around the address will be displayed.
5. Set the icon URL, icon width and icon height if you have a custom marker you want to display in place of the default markers used by google maps.

That's all you need to do to display a map in the front end.

Note, in order to offer a more advanced booking experience that includes setting destination and departure routes, this is yet another feature we will discuss in later sections known as "Places" and is a separate topic.

Styles tab

The booking form displayed in the front-end can be styled. We offer basic styling and advanced styling.

BASIC

Basic styling will allow you to change the color by selecting one from several predefined colors available. In addition, you can set some basic properties discussed below.

1. Select a Theme
 - This setting allows you to choose from one of several predefined color schemes available. The color scheme will apply to the wizard containing the booking form.
2. Font-Family and Font-size
 - This applies to fonts used in the wizard
3. Thumbnail width and height
 - This applies to the images you set on the availability. The image displays in the wizard when the availability is active.

ADVANCED

You can also control the presentation of the summary data found within the wizard. This will allow you to change the entire HTML structure of the content but keep in mind that some basic knowledge of HTML is required.

Importantly, try to pay particular attention to the existing tokens and the braces around the tokens. Some tokens are enclosed within 2 curly braces and others within 3.

We provide this level of customization to power users who know their way around templating engines. For a list of tokens, expand the tokens and control statement sections.

The templating engine in use will try to alert you of mistakes made, however this may not happen always. In case things don't look right, reset the template and start over. A reset button will appear after saving your first customization.

Text tab

The plugin will display textual content in the front-end based on various conditions. The content can be translated using a third-party translation plugin such as PolyLang or WPML. If you do not have access to these plugins, you can also translate manually using a separate third-party desktop application such as PoEdit.

If you just want to quickly edit text displayed in the front-end, this can be done by going in the Service – Text tab. Here you can customize content quickly and effectively, so that the text reflects content specific to your business.

This is service specific. So, if you have several services you will need to repeat this again for each service. A tool that will come in handy in this case is the “Duplicate” option found in the “Services” page.

Short codes tab

BOOKING FORM

A service can be inserted into a page or post to allow booking by copying the generated short code and pasting it into your page or post.

To find the short-code of your service, go into the short codes tab found in the “Services” page and select a service in the left pane. Then copy the short code generated in the right pane.

If you select multiple services, this will add a service switcher dropdown list in your booking form allowing your customer to switch services on the fly.

SEARCH FILTER

A search filter can be inserted into a page or post to allow listing availability. Any availability that matches the start date and end date used in the filter will be listed along with a thumbnail and description of the availability.

By clicking an item in the list, the resulting page linked to the service will be displayed with the booking form auto populated with the selected dates.

Note

When using the search filter, ensure that you set the “Search page result link” field found in the services page. This needs to be done for each service that will participate in the search result. Simply select the page where the service short-code has been placed. When the item is clicked in the search result, the page that opens is the one you set in the search page result link.

The description displayed will be the value set in the Services -> Availability page, “Description” field. The thumbnail used in the search result will be the thumbnail set in the Services -> Availability “Search result image URL” field.

PLACES

This allows you to create services that allow the customer to choose routes, i.e. Departure and Destination fields. To enable this, head on to the *Places* page.

Start tab

Click “Create new” to launch the “New service based location” dialog. This allows you to connect a service with places and define how you want it to behave in terms of cost. First select a service to proceed. The options that follow depend greatly on whether or not the service itself supports setting a cost.

- i. Cost does not apply
 - This means, while customer will be able to select a route, there are no costs attached. This is also the default if the service itself is a free one and does not support cost.
- ii. Enable cost by location
 - This means, you are going to add predefined locations and set cost per location. When the customer selects a location, cost will add up to the total amount.
- iii. Enable cost by distance
 - This means cost will be calculated by the distance between departure and destination.

Next click *Create*. You can now begin setting up the departure and destination fields.

The departure and destination tabs

1. Click the *Add new* button to add one or more places and is an optional setting. Keep in mind that when you add a new place, the departure/destination field displayed in the front-end will use a dropdown list containing each place you create. This allows you to force your customer into making a choice from one of these predefined locations. If no place is added, a textbox is used. After adding a place, you will be able to edit or delete it from the list in the right pane, below the map. Here you will also be able to organize the order by simple drag and drop.
2. Next set a Field label. This is the text you will see on the departure/destination field.
3. If you did not choose “Enable cost by distance” in the “New service based location” dialog, you will also be able to exclude the destination field. To do this, you will need to go in the *Destination tab* and uncheck the “Enabled” field.

The waypoints tab

This allows your customers to create waypoints en route to their destination. To enable this feature, check “Enable adding one or more waypoints” field. This will display an add button for waypoints in the front-end. Your customers will be able to add up to 23 waypoints. Google restricts the number of waypoints to 23 (per request).

The initial location tab

This is the default location displayed on the map. Choose a location that is within your service area.

The general tab

The general settings allow you some control on how the map looks and the various options displayed on the map. Check the fields that make sense for the service you plan to offer.

The aggregate cost tab

From the Places page, you can create departure and destination fields. This is done by selecting the service (The booking form) to which you want to connect with places, where after selecting the booking date and time, they will be further presented with fields that ask the departure and destination locations.

Aggregate cost page will be available to you if you selected: "Cost depends on predefined departure and destination combo", when creating the place.

This page will produce a cross match list of all your departure locations with those of destination. You simply need to add the cost for each combination and also optionally you will be able to exclude one or more combinations if you do not want to make these available.

SETTINGS

The settings page is where you can control various configurations of the plugin.

The general tab

This is where you may change the general behavior of the plugin such as approval, notifications, date/time formats and so forth.

The emails tab

The plugin sends out several notifications to customers regarding the status of their booking. General properties such as a sender name and email, the admin's email address, the logo of your company to include in the emails and color settings can be managed on this screen.

If you wish even more control, i.e. if you want to include custom content within the emails, select the template and add your modifications.

Importantly, try to pay particular attention to the existing tokens and the braces around the tokens. Some tokens are enclosed within 2 curly braces and others within 3.

Note that the templating engine in use will try to alert you of mistakes made, however this may not always happen. So, make sure you test the emails to catch any mistakes you may have made. In case things don't look right, reset the template and start over. A reset button will appear after saving your first customization.

SMTP SETTINGS

By default, emails will be sent through your local webserver, however you may change this by including a different mail server to send emails.

For example, on localhost, you may not even have a mail server running or perhaps you simply want to use a third-party mail server because your hosting mail server has constraints on sending mail.

Here's a quick example, if you were to use Gmail, which has a free and reliable plan. According to Google's documentation, you can send up to 100 emails every rolling 24-hour period when relaying through their SMTP servers. Which is roughly around 3,000 emails per month for free, not bad for regular usage.

The settings is as follows:

Expand the smtp settings and insert the following values:

- Server: smtp.gmail.com
- username: your Gmail address
- password: your Gmail password
- Port Number: 587
- Smtп Authenticate: true
- Protection: TLS

The payments tab

Here you can add or edit payment methods supported by the plugin. Currently we support PayPal, Stripe and Twocheckout out of the box with more to come in the future.

First set your currency and then proceed to configuring the one or more payment operators.

PAYPAL

If you plan to enable this payment operator, then ensure that you have selected a currency that is PayPal supported.

1. Check the enable field.
2. Provide your email associated to your PayPal account.
3. Set the title field. This value is used for the Payment operator selection in the front-end.
4. If you are still in the planning stages, check "Sandbox". This will allow you to test before going live.
5. Next save.

STRIPE

1. Check the enable field.
2. Obtain your secret key and publishable key from Stripe and insert these into the respective fields.
3. Set the title field. This value is used for the Payment operator selection in the front-end.
4. Next save.

TWOCHECKOUT

1. Check the enable field.
2. Obtain your account number, publishable key and private key from Twocheckout and insert these into the respective fields.
3. Set the title field. This value is used for the Payment operator selection in the front-end.
4. If you are still in the planning stages, check "Sandbox". This will allow you to test before going live.
5. Next save.

Note that if you enabled one or more Payment operator, they will be listed in the right pane where you can drag and drop to rearrange the order in which they will appear in the front-end.

Important: When testing payment operators, ensure you are running a live version of your site and not localhost. If you would like to test paypal or 2checkout on localhost, then you need to depend on services such as ngrok.com. This type of service will enable you to expose your local webserver to the internet.

Coupons tab

Coupons are a great way to offer discounts to your customers, and can help promote bookings.

1. Click the "New Coupon" button to launch the coupons dialog.
2. If you would like to restrict coupon usage to a particular service, select a service from the services list.
3. Set an expiry date for the coupon. The coupon will automatically expire after this date.

4. A unique ID is already provided for the coupon. If you would like to customize the code, then keep in mind that the code must be unique. You can supply something like 10%OFF, which is also easy for your clients to remember.
5. If you used a custom code such as 10%OFF in the previous step, then you might also want to set the “Coupon type” as *Super*. This will make the coupon usable an infinite number of times until date of expiration. The *regular* coupon type on the other hand allows only single usage, after which it is no longer valid.
6. Next select the discount type. This can be a fixed amount or a percentage amount deducted from the total.
7. If you would like the coupon to apply only if the total amount exceeds a certain value, set this in the “Apply coupon if exceeds” field.
8. If you would like to generate multiple coupons with the same attributes, provide a value in the “No. of coupons” field.
9. Now click create.

You are now ready begin your promotion. If you choose to use the super coupon, you will want to insert the code in your mass mailer or provide it in some form on your site.

Alternatively, you can email coupons individually by clicking the email button found beside any coupon you generate.

Important: Please keep in mind that if the service does not have coupons enabled, a setting found in the services page, then there won't be a coupon entry field in the front-end. So, ensure that you have enabled this on the service prior to handing out coupon codes to customers.

Email reminders tab

Let Calendarista remind your customers when an appointment is coming up.

To setup reminders, select a service and set a reminder value in minutes. Then click save reminder.

Reminders for that particular service will be sent out to the customer minutes before the appointment starts where minutes is the reminder value you saved on the service.

Reminders that were sent out will be documented in the list in this page so that you may track the results.

Important: Reminders are based on WordPress CRON jobs. These by default are not real CRON jobs and depend on site traffic. For accurate results, ensure that you have setup WordPress to function as a real CRON job.

Currently, the plugin does not require you to save a specific URL for CRON. What you need to do is to *“replace the WordPress CRON with a Real CRON job”*. If you are not familiar with this, then google the part within quotes above.

Error log tab

Any errors encountered during the normal operations of the plugin will be logged here. This can be useful if something isn't working, such as emails failing, payments rejected by a payment operator etc. The error log is cleared periodically or can also be cleared manually after viewing.

Assets tab

Third party CSS and JavaScript files registered by the plugin can be disabled here. This is useful in case there are third party plugins or themes are causing a conflict because they too include the same libraries. Generally, we do not recommend you disable any assets because sometimes the versions may differ and this will cause Calendarista to function incorrectly.

Some of the options worth a mention:

1. A setting noteworthy mentioning is “Debug mode”. This option when will include the full uncompiled versions of the client-side libraries. This may help sometimes when debugging issues.
2. The calendar used in the front-end can also be themed here. Simply select one from the various available themes in the “Calendar themes” field. Currently we include a single theme to keep the plugin size compact.
3. Set the URL to a Font file using the Font-Family URL field. The font-family name itself needs to be set in the services page, styles tab.

Feeds tab

You can export and import feeds of your appointments in iCalendar format. By doing so, you can synchronize appointments to/from third party platforms or Calendarista itself.

EXPORT

1. Check Enable
2. Select a service. If you want to limit appointments to a particular availability, then select an availability as well.
3. Copy the URL to the iCAL feed.
4. Now go into your third-party app and look for an ICS import setting. Paste the URL you copied.

IMPORT

1. Select a service. If you want to limit appointments to a particular availability, then select an availability as well.
2. Paste an iCAL feed you want to import. All appointments found in the feed will be synchronized with the selected service and availability.

You can perform this internally within the current instance of Calendarista as well or if you have Calendarista installed on separate domains. This can be useful if you want to synch services and if a particular date and time are booked on service A and you want to disallow booking on service B and vice versa.

Exports tab

The Settings - Export page will allow you to export your existing bookings to csv format, which you will be able to open in an excel spreadsheet or any other application that knows how to consume a file in csv format.

In order to export, you will need to use the export filters by selecting your service/availability and then providing a date or the customers email. Finally check the various pieces of data you want included in final result set for export along with the appointment status.

This will produce a file *.csv that is automatically downloaded by the browser.

Google Calendar tab

In order to authorize requests to the Google Calendar API, you need to generate the Client ID and Client Secret keys from google. Please follow these steps:

1. Go to the Google Developers Console: <https://console.developers.google.com/>
3. In the upper left part of the page, you should see a navigation menu, click it. It will slide down.
4. Next, click APIs & Services -> Library. In the list of APIs look for Calendar API and make sure it is enabled.
5. Click the same menu, you clicked in step 3. This time select APIs & Services -> Credentials.
6. Go to OAuth consent screen tab and provide a name for the product and click Save.<

7. Go to Credentials tab and in the New credentials drop-down menu, select OAuth client ID.
8. Next, Select Web application and create your project's OAuth 2.0 credentials. For Authorized redirect URI's enter the Redirect URI value found in Calendarista's Settings -> Google Calendar page and click Create.
9. In the popup window that appears, note the Client ID and Client secret values.
10. Add both the Client ID and Client Secret collected in step 9 and copy them into Calendarista and Create the profile.
11. Finally, in Calendarista, authorize the profile.

At this point, in Calendarista you should be seeing your calendars listed in the "Google Calendars" field. *Please note that the above steps are important. The Client ID and Client Secret keys generated must have the necessary authorization requests for the Google Calendar API.*

Data will be synched two-way. What this means is when an appointment is made on your website, it will be synched with the associated Google Calendar as well. And if you create a new appointment in Google Calendar, this will be synched back to Calendarista and will reflect on the respective service/availability.

Warning: When creating an appointment from Google Calendar, you must create the appointment exactly as your service mode. For example, if the service mode is "Single day and time", then select a single day and time.

Do not select a time range in this case i.e. if the appointment time is to be on 06/11/2019 11:00, then the correct event date and time is : 06/11/2019 11:00 - 11:00. An example of the wrong event date and time would be : 06/11/2019 11:00 - 11:30.

The same rule applies for other service modes. When a sync fails, this will be recorded in the plugins "Settings - Error log" page. Most of the failure will be due to mistakes as stated in the warning above.

GDPR tab

The General Data Protection Regulation (GDPR) is a regulation in EU law on data protection and privacy for all individual citizens of the European Union (EU). The GDPR aims primarily to give control to individuals over their personal data and to that end, you may enable GDPR from the Settings - GDPR page.

Once you check the "Enable GDPR" checkbox, the customer will receive a GDPR notification email during the booking. The email will contain a private link that will take them to a page where they will be able to download a copy of all their data stored on your system and also issue a request data deletion.

When a request for data deletion is made, as the admin user, you will be able to attend to such requests in the "Settings - GDPR" page, where you will be able to either accept and allow deletion or deny.

Updates Tab

Insert your purchase code to receive updates automatically. When a new update is available, you will receive notification in your WordPress dashboard, where you can install it directly. This allows you to avoid to having to manually download and update.

A purchase code can be registered only a live instance of your site.

Important: Keep in mind that once a purchase code is used, you cannot register it again on a separate website at the same time. In order to use it on a different domain or your site has undergone a domain change, you will want to first reset the purchase code in the update tab.

STAFF

Staff members can be setup in the “Staff” page. When a staff member logs into WordPress, they will be able to view the **sales** page, the **appointments** page and finally the **holidays** page and only on service availabilities they are registered to manage.

To create a new staff member:

1. Click the *Add new staff* button.
2. Select a Service and an Availability.
3. Set the staff member Name.
4. Set the staff member Email. This needs to be the email of a user already registered in your WordPress instance.
5. Now, every time this staff member logs into WordPress, they will be able to access the sales, appointments and holidays page from the WordPress dashboard.

HOLIDAYS

Your availability changes can be managed from the holidays page. This is quite useful especially for some unexpected reason you are unable to provide a service on any particular date or time.

To take a day/time off:

1. Select a service and availability.
2. Select a month and year in which you want to take the day off. Hit the close button.
3. Click submit. This will list all days in the selected month.
4. Take a day off by selecting one or more days and clicking the *update* button. If the availability contains time slots, then you will see a *time slots* button on each row. This will launch the take time off dialog. Check the time slots where you want to take time off and click the *update* button.

SALES

The sales page is where you can view bookings that sold. These are bookings made from services that have payment enabled and a valid cost amount. Free bookings are excluded from this list.

In addition to sales being listed, you can also view details of the booking and request payment for “unpaid” ones. This will send an invoice to the user to solicit payment or you can confirm payment in case you are collecting payment offline.

In addition, you can view the appointment.

APPOINTMENTS

From the appointments page, all appointments made will be displayed in a calendar view. Additionally, selecting an appointment on any particular date, you will be able to edit or cancel the appointment.

PACKAGE

The package service mode allows you to setup a specific number of days your customers can book. This is especially useful when setting up excursion trips, tours etc.

Let's say you have a tour once a month to Costa Rica that lasts 2 weeks and costs 600 euro.

1. Create a new service and in the mode field select *Package*.
2. After setting up the other properties in the service tab, move on to setup your availability.
3. In the availability tab, set the name and select the date to start the package. This will be the first day the booking will start. As we will want to repeat this monthly for 2 weeks, the repetition will start from this date.
4. For the *No. of days* field, insert the value 14. This means your package will consist of 14 days (2 weeks) which your customer will be booking.
5. For the seats value, insert the number of bookings you have available. For instance, if this tour has place for 50 people, then you might want to set the seats value to 50. After 50 bookings, booking will close for this tour.
6. If you set a value for seats in the previous step and you also want to allow a single individual to book more than one seat, you can check Group booking. What this will do is provide a list box in the front end where the number of seats can be selected.
7. Next set the value of the cost to 600. This will apply to the entire package containing a 14 days trip.
8. Next check the repeat box to display the Repeat dialog. Here select weekly and the day(s) of the week to repeat.
9. Click OK and then click the "Create new" button. Your availability is created. You can add more than one availability which will be listed as a separate package where the customer will be able to select the intended package, in this case you might have a selection of different trips you want to provide.
10. Your tour is ready for booking. Now copy the short-code generated. You will find this listed in the "Service" tab or you can go in the short-code tab and generate the short-code. Simply copy and insert this within a page or post.

TRANSLATIONS

Editing text is possible from the plugins services page. After selecting a service, head on to the Text tab and edit any piece of string that is to be seen in the front-end. However, while it allows you a quick way to modify text, this may not always be convenient especially if you plan to support multiple languages. But do keep in mind, if you plan to create translation files, then in this case you will need to reset text strings in the "Text" tab mentioned above.

Calendarista stores its language files in the plugins "languages" folder, i.e. `wp-content\plugins\calendarista\languages\`.

After creating your .mo and .po files, usually done through a third-party application such as poEdit, ensure that the file is named based on the domain "calendarista" followed by a dash, and then the locale.

The locale is the language code and/or country. For example, the locale for German is 'de_DE', and the locale for Danish is 'da_DK'. So, for instance, if we were to translate to Danish, the .mo and .po files should be named "calendarista-da_DK.mo" and "calendarista-da_DK.po".

As we issue updates, you are responsible for maintaining your language files updated. This makes saving your language files within the plugins languages folder quite a chore, hence we recommend you to instead store your new language files at the following location: `/wp-content/languages/calendarista/`

This has the advantage of you not having to worry about when updates are available as the language resource is stored outside the plugin directory.

Another convenient way to perform translations is to use WPML, a third-party translation plugin. This has the convenience of allowing you to perform all the work directly from within your WordPress dashboard.

WOOCOMMERCE

WooCommerce is an open source e-commerce plugin for WordPress. What makes WooCommerce integration a must for Calendarista is because there are so many payment gateways baked in. This integration will allow you to utilize WooCommerce for the payment features.

To enable WooCommerce, first create a WooCommerce Product of type Calendarista. This can be accomplished by:

1. Add a new WooCommerce product by clicking "Products - Add new".
2. Set a product name. For consistency, give the product name the same name of your service. This will allow you to identify the product easily as you will require it later when creating a service in Calendarista.
3. Select "Calendarista" from the "Product data" dropdownlist list.
4. Set a product image. This will show in your cart and is optional.
5. Click publish. You have now created 1 product of type Calendarista. You can create more products if you need to connect more Calendarista services with WooCommerce checkout.

To connect a service with WooCommerce, from the "Services" page in Calendarista, scroll down to the "Payments" section and:

1. Select "Enable payments and cart system through WooCommerce".
2. Select a WooCommerce product.
3. Click "Create New" or "Save".
4. It's done.

Now, during checkout, you will land on the WooCommerce cart page, ready for payment. After payment, the booking is logged both with WooCommerce and Calendarista.

The state of the booking will appear unpaid, until you go into the "WooCommerce - Orders" page and from the actions column, click the "Completed" button, represented by a checkmark icon. This will signal that the payment has completed successfully and the booking will also appear "Paid" in the Calendarista "Sales" page as well.

Important: When using optionals with seats enabled, if you add more than one quantity in woocommerce, the calculation is total x quantity.

Oh! You didn't find what you were looking for?

Honestly, we didn't think you'd read this far! We're still working hard to write more details and it seems like a few things have not made it through yet.

In the meantime, contact support directly with your questions and we will be happy to help while we keep updating the documentation.

We promise we'll take care of this ASAP.

