Book2Act

Book2Act enables your contacts – clients, customers and vendors – to book appointments directly to your Act! calendar from a website link.
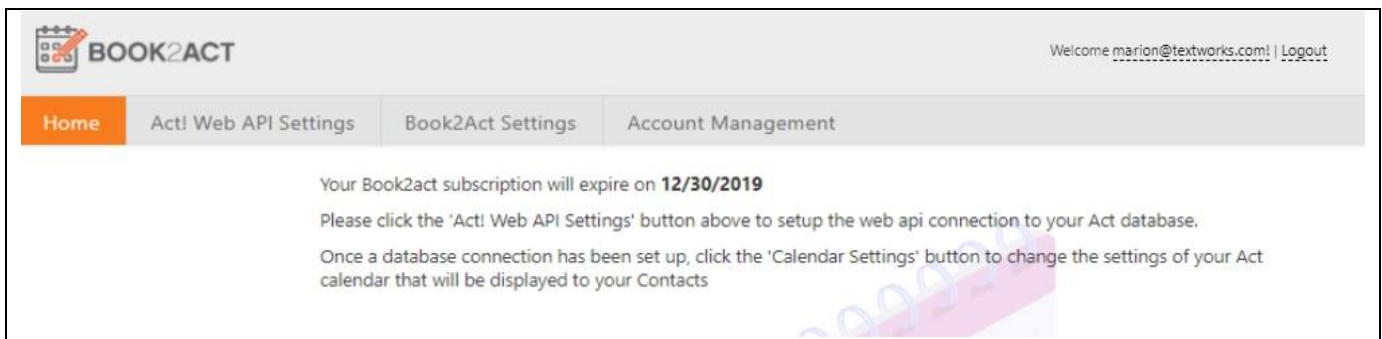
This document explains:

1. How to Configure Book2Act
2. How Your Contacts Use Book2Act

1. How to Configure Book2Act

Setting up Book2Act is a simple process:

1. Connect to your Act! database.
2. Set up Book2Act defaults.
3. Share the link with your contacts.

Book2Act also allows you to manage your account subscriptions.

1.1 Connect to Your Act! Database

1. Select the **Act! Web API Settings** tab, then enter the following information:

   Act! Web API URL – Specify the web link to your Act! database API.
   For your URL, contact your DB Administrator or, if you are using Act! Connect Link, follow the steps in this article: How to retrieve the Act! Web API URL when using Act! Connect Link

   Act! Database Name – Specify the name of your Act! database (for example, Act2018Demo).
   Contact your DB Administrator for DB name.

   Act! Username – Enter your Act! username.

   Act! Password – Enter the Act! password for the username.

2. Click **Save** to save your settings. "**Settings saved successfully**" will appear under the tab heading.

3. Click **Test Connection** to validate that you have entered the settings correctly. "**Connected to Act! Web API server successfully**" will appear under the tab heading.

1.2 Set Up Your Book2Act Defaults

1. Select the **Book2Act Settings** tab.
2. Select General to enter the general settings.
   a) Enter the Public Profile Settings:
      URL – This will be automatically generated by Book2Act.
      Full Name – Enter the name you want to be displayed to your contacts when they are scheduling activities. This does not have to be your actual name.
      Primary Email Address – Enter your email address that you want included in the schedule invitations.
   b) Enter Misc. settings:
      i) Closing Text – Enter a text message that you want to appear on the screen after a contact has successfully booked an appointment with you using Book2Act.
      ii) Company Logo – Select an image that you want to display at the top of the Book2Act page your contacts use to book appointments with you. Do not be concerned if the logo appears to be stretched or does not appear at all.
   c) Select **Save** to save any changes you have made to the settings.
3. Select Calendar Settings to set up the calendar:
   a) Enter the Calendar Settings:
      Start Time and **End Time** – specify the earliest and latest time of the day that your contacts can schedule an appointment with you
      Time Zone – use the dropdown to select the time zone you want displayed for your calendar
      Activity Type – select all of the activity types that your contacts can choose from when booking an appointment with you
      Date Format – use the dropdown to select the date format for the calendar invitations
      Multiple Time Slots – select if you want to allow users to book multiple consecutive time slots
   b) Select the **Required Fields** that your contacts must include when scheduling appointments with you.
   c) Enter the **Availability Settings**:
      i) Select the days of the week on which your contacts can book appointments with you.
      ii) Indicate if you want your contacts to be able to book meetings on the current date (if not checked, contacts may only book meetings for a future date).
   d) Select **Save** to save any change you have made to the settings.

4. Select Appointment Settings to set up the appointment options:
   a) Enter the Meeting Settings
      (you may use the up and down arrows to increment or decrement the values in the entry fields):
      Meeting Duration – Enter the length in minutes of the time slots on your calendar presented to your contacts for booking appointments.
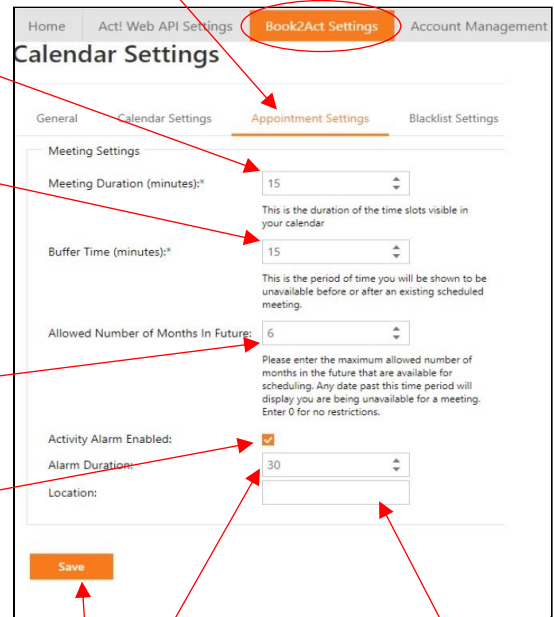   **Buffer Time** – Enter the number of minutes you will unavailable before and after existing appointments (for example, if this is set to 15, a half-hour meeting on your calendar will show you as busy for an hour, including 15 minutes before, 30 minutes for the meeting, and 15 minutes after).
      Allowed Number of Months in Future – Enter the number of months beyond the current date that your contacts can book appointments with you
      Activity Alarm Enabled – Check if you want your personal calendar to set an alarm whenever someone books an appointment with you.
      Alarm Duration – Enter the number of minutes before the appointment that Act! will display the pop-up alarm.
      Location – Specify the default location for the appointment (for example, your office location).
   b) Select **Save** to save any change you have made to the settings.
5. Enter the Blacklist Settings:
   a) Add days on which your contacts can not book a meeting (for example, national holidays or your vacation days):
      i) Click **Add**.
      ii) Enter the date you want blacklisted (select the down arrow to display a calendar to choose from).
      iii) Indicate if you want this date to be blacklisted every year.
      iv) Click **Add** to add the date to the list or **Cancel** to exit the dialog without saving the date.
   b) Delete any unwanted blacklisted days:
   i) Highlight the unwanted date.
      ii) Click on Delete.
   c) Click **Save** to save your calendar settings.
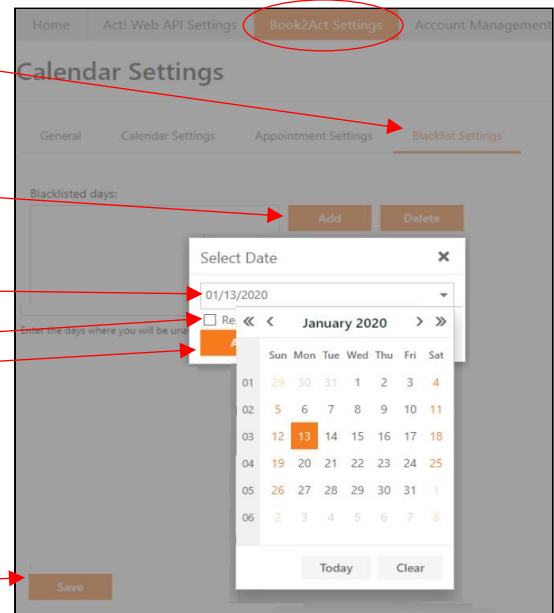
1.3 Share the Link with Your Contacts

1. Select **Copy URL** beside the URL link at the top of the General Settings under the Book2Act Settings tab. This is a link to your personalized Book2Act page that your contacts can use to book appointments with you.
2. Send the URL to the contacts you want to be able to book meetings with you. You can provide your contacts with the How Your Contacts Use Book2Act information below.
3. You will receive an email notification whenever a contact books an appointment. The appointment will appear on your Act! calendar and the relevant details will be recorded in the Act! database.
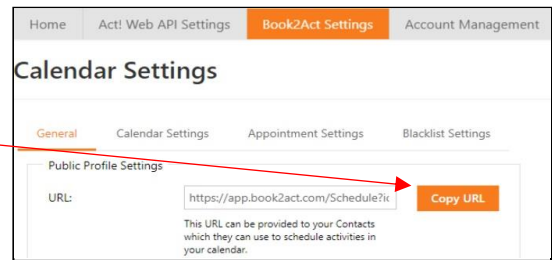
1.4 Manage Your Account Subscriptions

1. Select the Account Management tab to manage your account subscriptions. The page displays:
   - The date on which your Book2Act subscription will expire.
   - The number of unassigned subscriptions you have available.
   - Information about your current subscriptions, including who purchased them, which user they are assigned to, and the renewal date.
2. You can un-assign any assigned subscriptions.
3. You can assign any unassigned subscriptions.
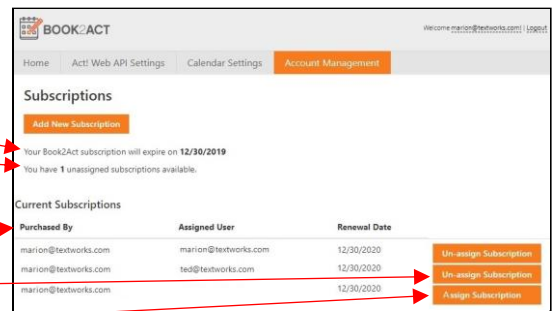
2. How Your Contacts Use Book2Act

Your contacts can easily book an appointment on your calendar using the link you provide them.
When your contact goes to the link, the contact will be greeted by your company logo and a listing of the time slots available for the current week. Your contact can:

1. Select a different week to display.
2. Book an appointment for an available time in the displayed week.

2.1 Select the Week to Display

To select a week other than the current week, do one of the following:

- Click the dropdown arrow in the **Date** field and select a new date, then click **Refresh**.
- Click **Previous Week** or **Next Week** to cycle through the calendar.

To show the time slots in a different time zone, use the dropdown arrow in the **Time Zone** field to select your preferred time zone, then click **Refresh**.
The available time slots on the available days will be displayed.
The times will be in the time zone selected above.
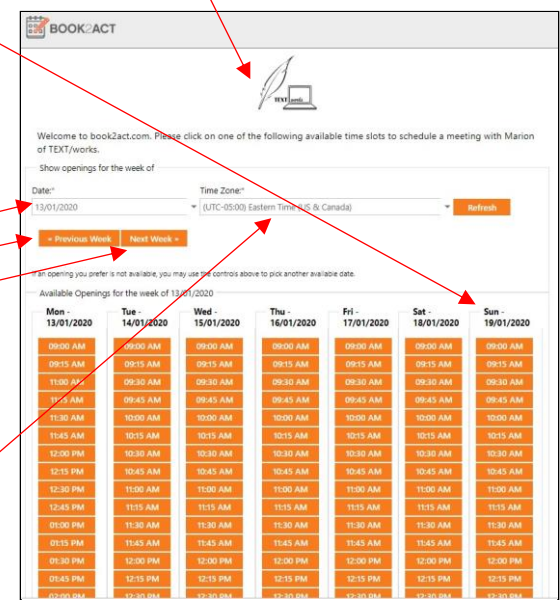
2.2 Book an Appointment

To book an appointment:

1. Select the date and time on which you wish your appointment to begin by clicking on the appropriate rectangle under Available Openings. Book2Act will display a Confirmation page.

2. Enter your Contact Information:

   Name – Enter the name you wish to appear on the appointment.

   Company – Enter the company you wish to appear on the appointment.

   Email – Enter your email address.

   Phone – Enter the phone number at which you can be contacted.

3. Enter the Appointment Information:

   Appointment Type – Select the appointment type from the dropdown list.

   Description – Enter a short description of the reason for the appointment.

   Details – Enter more details about the appointment request.

   Priority – Select the priority of the appointment using the dropdown list.

4. Select **Create Appointment** to add the appointment to the Act! calendar. You will be presented with a page that includes an ICS file so that you can easily add the appointment to your own calendaring system.

Note: If you select **Start Over**, you will go back to step 1.