

# PBBooking Plus Documentation

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# PBBooking Plus Documentation - Revision History

While I endeavour to keep this documentation up to date, there are times when the documentation falls behind. As of version 2 I have added a revision history to the front of this document.

Date	Revision	Summary of Changes
March 2011	1	Initial release of PBBooking Plus 2.0.5
18 April 2011	2	Documentation revised to reflect changes in 2.1
31 July 2011	3	Final release of 2.1 documentation.
4 August 2011	3.1	Modification of documentation for publishing & edit events.
19 Sep 2011	3.2	Documentation updates for 2.1.1 release.
13 Oct 2011	3.3	Changes to customfields for PBBooking 2.2.
26th Dec 2012	4	Major update for move to timeslots in PBBooking 2.2

Welcome to the PBBooking Plus Documentation. This has been specifically re-written for the version 2.2 range of PBBooking products. There were significant changes between version 1 and version 2. Please read the documentation carefully before installing.

**Important Note: The installation of PBBooking Plus Version 2 will overwrite all previous tables and saved data. Migration scripts are not included. Please be aware that you will need to re-create your calendars, configurations, and services.**

## About PBBooking Plus

The original PBBooking was developed for a natural health and wellness clinic. Their requirement was for online booking with integration into existing calendaring systems. The scope of PBBooking Plus has changed dramatically from this original.

PBBooking Plus has the following functionality:

1. define multiple services with defined durations;
2. create a variety of custom fields for capturing of other desired user data;
3. publish and subscribe to calendars using the internet calendar sharing (ics) format;
4. management function to allow operator based creation of new appointments, deletion of existing appointments and view the diary;
5. block time slots on various days to reflect opening hours etc;
6. block a specific range of days to reflect holidays;
7. single page checkout to maximize conversions and bookings;

In PBBooking there is a 1:1 relationship involving appointment time,calendar and the actual booking. In other words, only one booking, per appointment time, per calendar is allowed.

## 2.1 What's New in 2.2?

PBBooking 2.2 has seen a major change to the way time slots and bookings are handled. Users of previous versions would be familiar with the concept of timeslots. In response to user feedback these have been removed and a more flexible calendar has been implemented that allows booking at any time, with the actual granularity of display controlled by the user in the configuration.

Also new in 2.2 is enhancement to custom fields that allows a wider variety of custom fields including select boxes, radio buttons and check boxes. The templating for confirmation emails has also been extended to allow use of any of the custom fields captured during the booking process.

## 2.2 PBBooking Plus Requirements

PBBooking Plus has the following system requirements:

1. Joomla! 1.5 or greater;
2. PHP 5.2 or greater;
3. Javascript enabled on the client;

## 2.3 PBBooking Plus Definitions

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Term	Definition	Example
Service	The appointment types available.	1 hour remedial massage, or, 1/2 hour squash court booking.

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# PBBooking Plus Installation

PBBooking Plus is supplied as compressed Joomla! component. Installation is through the Joomla! Extension Manager.

Installation will remove any existing PBBooking database tables and overwrite your existing calendars.

PBBooking 2.1 and above makes use of the standard MooTools javascript framework supplied with Joomla!. Please ensure that if you use jQuery this has been correctly name spaced and has not overwritten the MooTools \$ selector.

# PBBooking Plus Configuration

While I have endeavored to make PBBooking as simple as possible to use, as can be imagined with any system involving online booking there is still configuration that needs to be done. Each system refers to one of the screens listed in the administration interface of PBBooking Plus.

## 4.1 Services

Services allow the administrator to define the available appointment types a client can book online. These are displayed as a drop down box on the create a booking page of the checkout process.

The following information is required for each service:

- Name - A name for the service which will be displayed to the user when booking their appointment. This is free of formatting restrictions and can include anything that the user will identify. If duration is important in the users decision making process the duration should be included in the description,
- Duration - The duration of the service expressed as minutes. The duration must be greater than 0 and is restricted to whole numbers only. A one hour booking is expressed as a duration of 60, while a 1 1/2 hour booking is expressed as 90. This field is not displayed to the user and is used for calculating the finish time of the appointment,
- Price - The price for the service as a number with no formatting. This field is not used presently, in version 3 of PBBooking Plus payment gateway integration will be included. This field is also not currently displayed to the user,

- **Linked Calendar** - The calendar which will be used for booking appointments to and determining availability.

There is no practical limit to the number of services that can be offered to a client, though aesthetically it is important to remember that service choices are provided through a drop down box.

Only one service type can be booked at each booking. For example, booking a massage followed by a facial would require two separate bookings.

## 4.2 Calendars

The heart of PBooking is the calendar configuration. Only one booking is allowed per calendar at any given time.

The following information is required when creating calendars:

- **Calendar Name** - A name for the calendar that will be displayed on the booking interfaces. For example: Tennis Inc might name their calendars 'Court 1', 'Court 2', etc;
- **In\_Cal** - When using the Consolidated View (see PBooking Plus Definitions) defines this calendar as a calendar from which appointments should be **read only**;
- **Out\_Cal** - When using the Consolidated View (see PBooking Plus Definitions) defines this calendar as the calendar for which appointments should be **written to**. **Only 1 out\_cal can be defined..**

**Important Note** Although in\_cal and out\_cal are still required as part of PBooking 2.2 they have been deprecated and are no longer used or respected when booking appointments.

### Calendar Trading Hours

New in 2.2 is Calendar Trading Hours. Each calendar defines it's own trading days and trading hours. When combined with the linked calendar in the service definition this allows users a great degree of control over what days and what times services are offered.

For example:

In our clinic we have a part time beauty therapist who provides facials and waxing 4 days per week from 12pm - 4pm. These beauty services have been linked to the beauty calendar. The beauty calendars trading hours are then set to select the beauty therapists working hours.

### 4.3 Configuration

Where possible we have used configuration values directly from Joomla to prevent double entry. Some of the configuration values used from Joomla include:

- sender email name and email address;
- server address;

These were previously configuration options within PBBooking.

To properly configure PBBooking Plus requires the following options in the configuration screen.

- Email Subject - this is the subject of the email that will be sent to users to verify their appointments;
- Email Body - the body of the email sent to users to verify their appointments. This can contain HTML markup, or just plain text. It is important to have the place holder `|*URL*|` in the text. This will be replaced with the URL that user needs to click to verify their treatment;
- Timezone - the timezone contains the time zone for which your business operates. This accepts a standard PHP timezone string;
- Block same day - this option determines whether you will allow clients to book appointments on the current day. This option is particularly useful to sole traders who might not always have access to email / internet to check new bookings;
- Calendar Message - a short message that is displayed underneath the calendar. This might include comments about bookings terms and conditions, availability notices, or potentially special prices. HTML tags can be used in the calendar message;
- Create Message - a short message that is displayed underneath the create booking form. This might include ensuring the user creates a valid email address and inform them that verification is necessary to secure their booking. HTML tags can be used in the create message;
- Calendar Heading Date Format - A valid format supported by strftime that is used to display the date in headings;
- Calendar Cell DateFormat - A valid format supported by strftime that is used to display the date in cells and tables;
- Confirmation Messages Date Format - A valid format supported by strftime that is used to display the date in confirmation email messages;

- Allow Subscribe - This option allows users to subscribe to calendars stored in the PBooking system from a desktop calendar that supports Internet Calendar Sharing. The default value for this is off. To allow users to subscribe to calendars check this box.
- Secret Key - For security purposes, if subscribe is enabled a secret key must be provided. This is a parameter provided in the URL that is checked when a user tries to access a calendar.
- Allow Publishing - By default allow publishing is turned off. When enabled this option allows users to publish calendars from Outlook, iCal or other application that supports publishing in Internet Calendar Sharing format.
- Username for publishing - for security reasons when enabling published calendars a username must be specified;
- Password for publishing - for security reasons when enabling published calendars a password must be specified.
- Use PBooking Provided Security - The username and password for publishing are only used when you choose to use PBooking's provided security. Some hosts do not support this, particularly when using PHP as a CGI module. To secure publishing on these servers disable PBooking Provided Security and secure the file using a .htaccess file;
- Show Link - When enabled a "Powered by PBooking" link is added to the bottom of the calendar pages.

#### 4.4 Custom Fields

As of version 2.2 the custom fields have evolved significantly from previous versions.

In 2.2 it becomes possible to use custom fields other than text fields and the following fields have now been made available:

- select box;
- check box;
- radio box;

If you are defining any of the above as input fields you must define values. To create values simply enter the possible values separated by a '|' character.

For example:

A select box for titles would have:

Mr|Mrs|Miss|Ms

A radio box for gender would have:

Male|Female

Each custom field can be defined as Is Required? if the field is mandatory. This will enforce error checking in the front end and prevent the appointment being saved without the field being completed.

**There is a known issue in Joomla! 1.5 with checking of radio boxes and check boxes. MooTools 1.12 with Joomla! 1.5 does not support CSS psuedo selectors making it impossible to check these types of fields contain a value.**

Any of the custom fields can now be used in the email body to the client. To include a custom field, simply use the place holder in your email body.

For example:

A radio button custom field for gender could be accessed as `|*gender*|`

## 4.5 Trading Hours & Holidays

In 2.2 the previous block days interface has been expanding to Trading Hours & Holidays. This is a very important section for controlling not just the times displayed in the front end, but also the groupings listed in the first drop down box for time selection.

### Opening Hours

Opening Hours defines trading days and opening and closing times for the overall business. Opening hours also need to be set for each calendar, see the Configuration section dealing with Calendars.

For each day 3 settings are required:

1. Is Trading Day? - A checkbox indicating whether the selected day is a trading day or not,
2. Opening Time - a text field in 24 hour format indicating the opening time,
3. Closing Time - a text field in 24 hour format indicating the closing time.

### **Configure Shift Times**

To prevent all possible time slots being displayed in what could be a very long list on the front end a second drop down prompts for the shift. Each shift defines the following items:

1. a shift label - this is what will appear in the front end. It must not contain spaces or symbols,
2. shift start - the starting time for the shift,
3. shift end - the ending time for the shift.

### **Block Dates**

Have you ever felt like you want a holiday or some time away? It is important to make sure that clients don't book appointments during your holiday times, but calling a client to reschedule after they have made a web booking is just a poor customer service experience.

Block Days in Range is a new menu option under the Block Days interface from version 2.1 onwards. Using the Block Days in Range interface specific date ranges can be marked as unavailable. While they will still appear in the front end interface, they are not able to be selected and they will be marked as unavailable.

## Management & Administration

### 5.1 Manage Diaries

A new option in PBooking Plus version 2 is the inclusion of the Manage Diaries interface. Manage Diaries allows administrators or business owners to view the calendar and create or delete events without requiring the implementation of calendar integration.

Opening the Manage Diaries screen will provide a view of the current month with previous and next buttons at the top of the screen. Simply select any day to drill down for more information.

#### Create Appointments

To create appointments in the diary simply click the plus button, fill out the details and select save. The appointment will be written to the nominated diary. If you are using Desktop Calendaring Integration subsequent publishes to the calendar will overwrite these details so be sure to take care which calendar you are writing to.

#### Edit Appointment

Click on the appointment to be taken to the edit screen. This allows you to change the date, the time and any other details of the calendar.

Please be aware if the event is an event in a published calendar it will be modified the next time the calendar is published.

### **Delete Appointments**

To delete an appointment simply click on the event and then click the delete link in the top right of the edit screen.

## PBBooking Plus Security Implications

The subscribe and publish options are powerful options that require a degree of care when implementing.

By default subscribe and publish are disabled. When enabling these you will need to enter a subscribe key, publish username and publish password. These are the safe guards that prevent unauthorized access to your calendars.

Some hosts do not support the use of the `$_SERVER['PHP_AUTH_USER']` and `$_SERVER['PHP_AUTH_PW']`. In these cases to provide secured publishing uncheck the Use PBBooking Provided Security option and set up .htaccess security.

## Appendix A - Integration With Desktop Calendaring

Prior to PBBooking Plus v2 the only option for viewing calendars as with the integration provided by the transfer of internet calendar sharing files. This has since been changed, however some people may still wish to use this integration to prevent duplicate bookings through online and offline methods.

Calendar integration with desktop calendaring products such as Outlook, Mozilla Sunbird or Apple iCal is provided through the use of published calendars. This option allows users to export their calendar in internet calendaring sharing which can then copied to your web server and added as a a calendar within PBBooking Plus.

**Important Note:** Think carefully when setting up caledars if you are planning to use the synching option as many calendaring applications do not allow you to subscribe and publish within the same calendar.

### 7.1 Publishing a Desktop Calendar

To publish a desktop calendar it is necessary first to:

- enable publishing and define a publish username and publish password within the configuration section of PBBooking;
- create a calendar within the calendars configuration section of PBBooking;
- From within your calendaring application calendars can be published by using the following url. [http://www.yourdomain.com/components/com\\_pbbooking/calendars/publish.php/1.ics](http://www.yourdomain.com/components/com_pbbooking/calendars/publish.php/1.ics)

Where yourdomain.com is replaced by your actual domain name and '1' is replaced by the calendar id of the calendar you wish to publish as.

### **Subscribing to a Calendar**

Subscribing to a calendar is very similar to publishing. The URL to be used is:

`http://joomla16/index.php?option=com_pbbooking&task=subscribe&format=raw&cal_id=1&subscribe_secret`

While it might look like a monster URL broken down in parts it is quite straightforward.

- joomla16 is replaced with the domain name of your web site;
- cal\_id=1 is replaced with the id of your calendar i.e.. cal\_id=3;
- subscribe\_secret is replaced with the secret you have defined in your configuration;

## Appendix B - Credits & Acknowledgements

As with any project there are always credits and acknowledgements that need to be given.

First and foremost, my wife. She has put up with many nights of me tapping away at the keyboard both in actual coding and user support requests.

Other thanks go to:

Famfamfam for the Silk icon set that is used in the administration interface; Open Clipart Library for the calendar image that is used as the default on the calendar screens;

## Appendix C - Frequently Asked Questions

These are some of the most common support requests. Have a quick read over these before submitting a support ticket to see if these can get you back on track straight away.

### How Do I Change The Currency Symbol?

The currency symbol is defined in the front end language file. On an english installation this will be located at:

```
/language/en-GB/en-GB.com_pbbooking.ini
```

Line 6 has a reference to:

```
COM_PBBOOKING_CURRENCYSYMBOL
```

Change this to your preferred currency symbol.

### Why Isn't The URL In the Validation Email?

Chances are you have edited the message body field in the PBBooking Configuration section and removed the `|*URL*|` tag. When preparing the message to send this tag is removed and replaced with the full URL defined using the Joomla JURI library.

## Why Doesn't My Page Look Like The One on the Web?

Welcome to the world of CSS and cross browser compatibility.

The demo server runs a standard Joomla! 1.7 installation and out of the box installation of PBBooking. There has been no customisation to the template.

Changes you make to the CSS and html of your template will affect the layout of components.

You can customise the CSS of PBBooking by editing the `user_view.css` file located at:

```
/components/com_pbbooking/user_view.css
```

## Why Isn't My Radio/Check Box Validated on the Front End?

This is an issue that affects Joomla! 1.5 only. The version of MooTools supplied with Joomla! 1.5 (1.12) does not support CSS pseudo selectors such as:

```
$('input[name=my_var_name]:checked')
```

this means there is not an easy way to check that this hasn't been checked.