

Instructors

Getting Started with Your eSoft Planner Account

Customize Your Dashboard:

Your dashboard is completely customizable to be set up in the way that works best for you.

- Click on **My Preferences** in the **Software Shortcuts** section in the upper left corner of your dashboard
- Check the boxes of the items you would like displayed on your dashboard (**All instructors should be sure to include My Appointment Availability, Facility Schedule, and at least one of the following: Daily, Weekly, or Monthly Schedules. Instructors who assist clients in scheduling appointments should also select Employee Appointment Availability.**)
- Choose which order they will appear by clicking on an item in the Order box and clicking either the up or down arrow until it is in the position of your choice
- Click the Update Preferences button when you are finished

Set Your Appointment Availability:

Post when you are available to be scheduled for an appointment. Clients will be able to view this information from their account and book an appointment with you. You will have the option to make your availability recurring daily or weekly.

Tip: We recommend that you have your availability posted for 6 – 8 weeks into the future. This allows clients to schedule out further, which will optimize your opportunity for more filled appointments. You can see your last scheduled availability on the bottom left side of your employee dashboard.

- Click on **Schedule My Appt. Availability** under the **Scheduling** tab in the top menu OR using the shortcut on the Employee Dashboard
- Click the Add Availability button at the top corner of the screen
- Specify the date you would like to schedule availability
- Specify the location that the appointment will be held
- Specify whether or not you wish to allow double booking for this appointment

- Click the View Availability button
- Specify the times you are available:
 - Check the box next to each time slot that you wish to indicate your availability
 - Click on the hour and all boxes within that hour will automatically be checked
 - Click the Check All button and uncheck the times you do not want scheduled
- Click the Schedule Now button
- Review the times you have selected in the box at the top of the screen
- If the available appointment times are **not correct**, click on the Cancel button at the bottom of the screen
- Determine if you would like to make these appointments Recurring

Tip: The Recurring feature WILL APPLY TO ALL appointment availabilities you are scheduling at this time.

To Make These Recurring Availabilities:

- Select either Daily or Weekly from the Type of Recurring drop-down menu
- Select the Number of Times Recurring from the drop-down menu

For example, if your availability is set for Monday and you select **Daily Recurring 2** times, it will schedule that availability for Monday, Tuesday and Wednesday.

If your availability is set for Monday and you select **Weekly Recurring 2** times, it will schedule that availability for this Monday and the following two Mondays.

- Click the **Schedule Appointment Availability** button at the bottom of the screen

Transactions from the Dashboard:

You are able to schedule, cancel, reschedule, and reserve appointments and rentals, as well as enroll clients in camps/classes from the employee dashboard. You also have the ability to include notes or special instructions with these scheduled events.

Tip: Marking notes/instructions as Public allows both clients and employees to see the note; while marking it as Private will only allow employees to view it. **Examples) Public Note** - Client requests to have a 55 mph pitching machine available. **Private Note** - Remember to talk to the client about renewing their membership.

Look for the help icon  on each screen to access support documents. (The support section is searchable.)

See support documents for the following transactions:

Location Rentals

Appointments

Camps/Classes