Quick Resource Sheet for Acuity Scheduling

How to Navigate in Acuity with Ease

See below directory where to find or make a specific change in Acuity.

1. Appointments
2. Client's Scheduling Page
3. Business Settings

Appointments:

- **Appointment Calendar**
    - Edit or delete the appointment
    - If you manually created an appointment on your Outlook, iCal or Google calendar you would do the edits where the appointments were first created. If the appointment was booked inside Acuity, you would edit the appointment in Acuity.
    - If you have multiple calendars you can select which calendar you want to view here.

- **Client List**
    - Go to your client list to manually set up appointment with your clients
- **Reports**
    - Reports will show all your appointment history by appointment types or by months, income generated, etc.
- **Import/Export**
    - You can import your contact lists from your Gmail, Outlook, icloud

Client's Scheduling Page

- **Scheduling Page Link**
    - Where you would go to grab the embed scheduling code directly to your website.

- **Customize Appearance**
    - Set up your time zone, branding set up for your scheduling page that clients will see, change your logo
- **Advanced CSS**

Business Settings

- **Availability**
  - Set up your regular hours or group of hours per appointment type
  - Make changes to your availability by hours and dates

- **Appointment types**
  - Go here set up Add-Ons to your appointment. An online store selling products and appointment packages.
  - Go here to get your scheduling link to share with clients via email.

- **Intake Form Questions**
  - Go here to edit or set up Intake forms for your clients to fill out before your appointment or coaching session?

- **Coupons & Gift Certifications**
  - Where you go to create coupons and Gift Certifications for your favorite client or during the holidays
- **Manage Users**
  - Add a staff member to manage your calendar.
- **Integrations**
  - Review integration options and features.

- **Sync with other Calendars**
- **Payment Settings**
  - Where to go to set up your payment options to take payments before sessions.
  - Where to go to take payments if you set up your appointment type with deposits

- **E-Mail Settings**
  - Email Setting is where you go to set up new appointment type emails (Initial confirmation, reminders and follow-up
  - Where you go to customize each appointment type reminder email

My Account settings

  - This is where you set up your Time Zone, Sidebar Color, Email/Username, Billing and location of your API key for integrations with third party software. (Application Program Interface).