

CiviBooking – A first look



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Civi booking

CIVI BOOKING



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What did we have?


For our previous client we developed a bespoke room booking system

- Book a single resource
- To one or more contacts
- “Create a slot”
- Clients can then pay for a “slot” online



CiviBooking – Webform integration

HOME



REGISTER FOR AN APPOINTMENT

To book an initial assessment appointment with us please select a date from the list below and follow the instructions. *

◀ Previous Week Monday 17 September - Saturday 22 September 2012 Next Week ▶

Show booked | Hide booked

Centre: ALL Warren Street Artillery Lane

Unable to find a slot? Join waiting list

Date	Time	Select	Date	Time	Select
Monday 17/09/2012	16:30 - 17:45	<input type="radio"/>	Wednesday 19/09/2012	8:45 - 10:00	<input type="radio"/>
Monday 17/09/2012	18:00 - 19:15	<input type="radio"/>	Wednesday 19/09/2012	9:30 - 10:45	<input type="radio"/>
Monday 17/09/2012	18:00 - 19:15	<input type="radio"/>	Wednesday 19/09/2012	17:00 - 18:15	<input type="radio"/>
Tuesday 18/09/2012	11:00 - 12:15	<input type="radio"/>	Wednesday 19/09/2012	18:30 - 19:45	<input type="radio"/>
Tuesday 18/09/2012	11:00 - 12:15	<input type="radio"/>	Thursday 20/09/2012	12:30 - 13:45	<input type="radio"/>

Calendars:

Calendar tab

NEW INDIVIDUAL

First Name:

Last Name:

Email:

Save

RECENT ITEMS

- Stuart Brough
- System Admin

WARNING: Debug is currently enabled in Global Settings. (learn more...)

Actions: Edit, Delete Contact

Summary Cases Activities Relationships Groups 1 Tags Change Log 5 Clinician unavailability 1 Calendar

Reserved Appointment Unavailable

today Jul 23 - 29 2012

Mon 7/23 Tue 7/24 Wed 7/25 Thu 7/26 Fri 7/27 Sat 7/28 Sun 7/29

8am

9am

10am

11am

12pm

1pm

2pm

3pm

Blue = Slot reservation

Red = Appointment

Black = unavailable / holiday



What are we trying to achieve?

In a nutshell...

- We want a system where multiple configurable "resources" can be reserved, paid for, and then used, by CiviCRM contacts.



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V1 Features

AT F69f0L62

- Limited and unlimited resources
- That can be configured
- Multiple resources can be booked
- Price automatically calculated
- Ability to record status and payment
- User interface, contact activities etc...



Limited vs Unlimited resources

- Create your resources
 - Limited resources – e.g. rooms, projectors, vehicles (people?)
 - Unlimited resources – e.g. Tea, coffee, food etc.





Resource properties and configuration options

- Resources will have configurable properties

E.g. Type, Location, Max size etc.

- Resources will have configuration options

E.g. Rooms: Layout type, no of seats etc. Price based on config?

E.g. Vehicle: Layout, disability requirements



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Booking resources:

ROOKIU8 LG20NLC62:

- People can book multiple resources at once:
 - i.e. 2 Rooms, a Van, Tea and coffee, 20 x Food and Drink (Vegetarian)
- System will calculate the price
- Allow for a manual override (discounts).





Booking resources:

ROOKIU& LG20nLC62:

- Once booked will create an activity for contact of type “booking”.
- Contact will have a tab for bookings.



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Status and payment:

- Will have status options for booking including:
 - Reserved (Provisional, Confirmed, Cancelled, Completed/Paid)
 - Optional others
- Option to record payment (like CiviEvent). Can click record payment and system will create contribution record.



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Status and payment:

- If cancelled, able to record if “payment expected”



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CIVICRM



Workflow:

Create New or Clone an Existing Booking



Choose contact (soft credit booking to organisation)



Add Room Buckets with availability lookup and associated options



Add other buckets with availability lookup



Add unlimited resources with numbers



Ongoing Cost must be auto displayed



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Workflow:

Save Booking with default Status, and / or continue



Mark as paid



Create contribution record for payment



Send booking confirmation email



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Future features

- Reports
- Integrate with advanced search
- Integrate with “search + export”
- Integrate to contribution pages to allow for pay online
- Contacts as resources



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Make it happen!

- Currently seeking funding (Approx £4k) for:
 - Some useful features
 - Ongoing maintenance
 - v2 Features
- Donations over £1,000 will receive free installation and configuration when the module is available



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Next steps?

- Generalised booking function – join the discussion!

Wiki:

<http://civicrm.org/blogs/jamienovick/civibooking-relaunch>

Blog post:

<http://wiki.civicrm.org/confluence/display/CRM/Booking+Component>



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Any questions?

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