



Appointiqa

GETTING STARTED GUIDE

Setting up your booking page, start to finish.

Everything you need to go from signing up to taking your first real booking — branding, services, staff, payments, billing, themes, layouts, recurring bookings, WhatsApp notifications, and a few things worth knowing before you share your link.

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STEP 1 OF 14

Creating your account

Go to **appointiqa.com** and click “Create your booking page.” You’ll be asked for:

- **Business or individual name** — your name or your business name.
- **State and city** — where your business is located.
- **Subdomain** — becomes your booking page address, e.g. *yourbusiness.appointiqa.com*. Fills in automatically — edit it if needed.
- **Your name, email and password** — your admin login credentials.
- **Phone / WhatsApp number** — must be verified via WhatsApp before the account is created.

WORTH KNOWING

Your subdomain can’t be changed later without contacting support. Take a moment to pick one that matches your actual business name.

Verifying your WhatsApp number

As part of signup, Appointiqa sends a 6-digit code to your WhatsApp number. Click **Send code**, enter the code that arrives, then click **Verify**. The form stays locked until verification is complete.

- Codes expire in 10 minutes — request a new one if yours arrives late.
- Maximum 3 codes per phone number per hour.

Accepting the Terms of Service

Before creating your account you must scroll through and read the Terms of Service panel on the signup page. The acceptance checkbox is disabled until you reach the bottom. Once you tick it and submit, your acceptance is recorded with a timestamp.

- Full Terms at **appointiqa.com/terms** — Privacy Policy at **appointiqa.com/privacy**.

WHAT THE TERMS MEAN IN PLAIN ENGLISH

Appointiqa provides scheduling software. Money goes directly from your customers into your Razorpay account — Appointiqa never holds or touches your revenue. Any disputes between you and your customers are your responsibility to resolve.

Verifying your email

After your account is created, you'll receive an email with a verification link. You won't be able to log in until you click it. Check spam if it doesn't arrive, or use the "Resend verification email" option on the login page.

Logging in

Visit **yourbusiness.appointiqa.com/admin/login**. The redesigned login page has two stages:

- **Stage 1 — Credentials:** enter your email and password. The progress bar shows step 1 active.
- **Stage 2 — WhatsApp code:** a 6-digit code is sent to your registered WhatsApp number. Enter it to complete login. The code expires in 10 minutes.

Waiting for approval

New accounts start in a "pending" state. You'll receive both an email and a WhatsApp message the moment your account is approved, with a link to your live booking page and your admin dashboard.



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Branding your booking page

Find all of this under **Settings & Payments** in your dashboard sidebar.

Logo and cover photo

Upload your logo (square images work best) and an optional wide cover photo.

Tagline and about text

A short tagline appears under your business name. The “About” field supports bold, italic, links, and bullet lists.

Highlights

Up to five short reasons customers should book with you. Each appears as a small badge.

Contact details and address

A phone number, support email, and physical address shown on your public booking page.

Import from your website

Paste your existing website URL and Appointiqa will suggest a tagline, description, cover image, phone and email for you to review before saving.

WORTH KNOWING

Your booking page is live from the moment your account is approved — you're just deciding how good it looks before you share the link.

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Adding your services

Go to **Setup** → **Services** in the sidebar. For each service set a name, description, duration, price, and these key choices:

Time slots or token queues?

Most services use time slots. Token-based booking is for walk-in-style businesses: customers get a queue number for a given day instead of a fixed time.

Does this service need payment online?

Untick “Require payment to confirm” for services you collect payment for in person.

Staff assignment mode

- **Customer chooses** — the customer picks a specific team member.
- **Auto-assign** — the system picks the staff member with fewest bookings that day.

Buffer time and daily booking limits

- **Buffer time** — blocks a gap after each appointment before the next can start.
- **Daily booking limit** — caps confirmed bookings for this service per day.

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Adding your staff

Go to **Setup** → **Staff**. Add each team member and tick which services they offer.

Staff profile — shown on your booking page

- **Photo** — headshot or professional photo.
- **Designation** — e.g. “Senior Stylist” or “Dermatologist.”
- **Years of experience, specialisations, short bio, social link.**

Staff cards scroll as a horizontal carousel on the booking page.

Token limits

If any of their services use token-based booking, set “Max tokens per day” here.

Custom fields per service

On the Services page, each service has a “Custom fields” link for extra questions on the booking form.



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Setting your business hours

Go to **Setup** → **Business Hours** to set default opening hours for each day of the week, plus any dates you're closed entirely.

WORTH KNOWING

If a service is 60 minutes long and you close at 18:00, the last bookable slot will be at 17:00 — Appointiqa makes sure the appointment fits inside your hours.

Pausing your booking page

Under **Settings**, the "Booking page" toggle lets you pause bookings temporarily without losing any data.



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Connecting Razorpay

THE MOST IMPORTANT THING TO KNOW

Appointiqa never holds or touches your money. You connect your own Razorpay account and every payment settles directly into it.

Go to **Settings & Payments** → Razorpay. Paste your Key ID and Key Secret from your Razorpay dashboard. Switch from Test to Live mode when ready.

Per-service payment control

Each service can independently require payment at booking, or allow pay-in-person.

RAZORPAY REQUIRES PUBLISHED POLICIES

Razorpay requires published Terms, Privacy, and Refund Policy pages before activating live payments. Appointiqa automatically generates these pages for your booking page — they are linked from your booking page footer. No manual setup required.

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Billing and invoices

Your Appointiqa subscription is managed from **Settings** → **Billing** in your admin sidebar. This is where you pay your setup fee, pay your monthly subscription, and download GST tax invoices for every payment.

Your plan and trial period

When your account is first approved you are on a 14-day free trial. Two status cards at the top of the Billing page show your current plan (Starter, Growth, or Pro) and your account status (Free trial / Active / Overdue / Suspended). The number of days remaining in your trial is shown under the plan name.

TRIAL PERIOD

Your booking page is fully live during the trial — you can take real bookings and real payments from day one. The trial period is so we can help you get properly set up before any money changes hands between us.

The setup fee

After your trial ends, a one-time setup fee becomes due. The amount depends on your plan:

- **Starter** — ■799 + GST
- **Growth** — ■999 + GST
- **Pro** — ■1,199 + GST

The Billing page shows a payment action box with the full GST breakdown: base amount, 18% GST, and the total payable. Click the Pay button to open Razorpay checkout and pay by UPI, card, or netbanking.

Monthly subscription

After the setup fee, a monthly subscription keeps your booking page live:

- **Starter** — ■299 + GST/month (first month free after setup fee)
- **Growth** — ■499 + GST/month
- **Pro** — ■699 + GST/month

You'll receive a reminder email and WhatsApp message 4 days before each payment is due. There is a 5-day grace period after the due date before your booking page is suspended. Paying at any time during the grace period reactivates your page immediately.

PAYMENT GOES TO APPOINTIQA, NOT RAZORPAY

Your subscription fee is paid to Social Avatar (the company behind Appointiqa) via Razorpay. This is separate from the Razorpay account you connect for your own customer booking payments — those go directly to you.

Dashboard billing alert

Your admin dashboard shows a coloured alert banner at the top whenever something needs attention — a trial ending soon (amber), a payment overdue (red), or a successful payment confirmed (green). Clicking the link in the banner takes you directly to the Billing page.

Downloading your GST tax invoice

Every confirmed payment generates a GST-compliant tax invoice automatically. In the **Payment history** table at the bottom of the Billing page, each paid row shows an invoice link like “■■ AQ/2026-27/0001”. Click it to open the invoice in a new tab.

The invoice includes:

- Invoice number in the format AQ/[financial year]/[sequence]
- Supplier details: Social Avatar, GSTIN, PAN, and address
- Recipient details: your business name, city, and state
- SAC code 998313 (Information Technology Software Services)
- Taxable amount, CGST + SGST (if you are in Kerala) or IGST (other states), and total
- Razorpay payment reference for reconciliation
- GST breakup table as required for filing

Click **Print / Save as PDF** in the top bar of the invoice page to save it. Choose “Save as PDF” in your browser’s print dialog.

FOR YOUR ACCOUNTS

These invoices are valid GST tax invoices issued by Social Avatar (GSTIN: 32XXXXXXXXXX) and can be used for input tax credit claims if your business is GST-registered. Share them with your accountant.

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Notifications and reports

Email notifications

Every confirmed booking automatically emails the customer and emails you a notification. Connect your own SMTP under **Settings** → **Email Notifications** to send from your own business email.

WhatsApp notifications

Customers can receive a WhatsApp message when their booking is confirmed, cancelled, or rescheduled — provided they ticked the opt-in checkbox when they booked and a WhatsApp Business number is connected under **Settings** → **WhatsApp Notifications**.

- **Appointiqa's shared number** — no setup needed on your end.
- **Your own number** — requires a verified Meta Business Account and approved templates.

Account approval WhatsApp

When your account is approved by the Appointiqa team, you will receive both an email and a WhatsApp message on the number you verified at signup, with a direct link to your live booking page and your admin dashboard.

Reports

Revenue and booking charts — by day, by service, by staff, by time of day. Export to Excel at any time.

Google Sheets sync (optional)

Every booking appends a row to a Google Sheet you choose. Set this up under **Settings** → **Google Sheets**.

QR code

A branded QR code with your logo and theme colour, linking directly to your booking page. Download under **QR Code** in the sidebar and print on your counter, window, or flyers.

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Managing bookings

All bookings are under **Bookings** in your sidebar. Filter by status, see customer details, notes, custom field answers, and payment status at a glance.

Creating a booking manually

Click **+ New booking** to create a booking for a phone-in or walk-in customer. The same availability rules apply and the customer gets the same confirmation email.

Rescheduling

Click “Reschedule” on any confirmed booking to move it to a new date and time. The customer receives a rescheduling email automatically.

Cancelling

Click “Cancel” and confirm. The customer receives a cancellation email (and WhatsApp if they opted in) immediately. For series bookings, you can cancel just one session or the entire remaining series.

WORTH KNOWING

Cancelled token numbers are never reissued — the queue stays consistent for customers who were there.

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Custom booking fields

Go to **Setup** → **Services** and click “Custom fields” next to any service to add extra questions to the booking form for that service only.

Field types

- **Short text** — a single line.
- **Long text** — a multi-line textarea.
- **Phone number** — a phone-formatted input.
- **Dropdown** — a list of options you define. Customer picks one.

Each field can be required or optional. Answers are saved with the booking and shown in the Bookings list.

WORTH KNOWING

Deleting a field keeps existing answers in the database — they just lose their label display.

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Recurring bookings

Customers (and your admins) can book a series of sessions in one go — useful for weekly physiotherapy, monthly consultations, or any service that repeats on a schedule.

Recurrence options

- **Pattern** — Every week / Every 2 weeks / Every month (same date) / Every month (same day of week).
- **Sessions** — how many total sessions to book (2 to 12).
- **Payment** — pay for all sessions upfront in one Razorpay transaction, or pay for the first session only.

Checking availability

After selecting the pattern, clicking “Check availability” generates the proposed dates and checks each one against your real-time availability. Dates that are fully booked are shown with a reason and automatically unchecked. The customer decides which sessions to include.

In the admin dashboard

Series bookings appear with a “■■ Series #N” badge in the Bookings list. The actions column shows “Cancel” (this session only) and “Cancel series” (all remaining).

WORTH KNOWING

Each session in a series is a fully independent booking record. Rescheduling, cancelling, or completing one session has no effect on the others.

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Themes and layouts

Go to **Settings** → **Theme & Colours** in your admin sidebar.

Colour themes

Eight curated themes: Forest, Ocean, Rose, Slate, Amber, Crimson, Violet, Charcoal. Each defines a primary colour, accent colour, and font pair.

Layouts

- **Classic** — single centered column. Clean and familiar.
- **Split** — branding panel on the left, booking steps on the right.
- **Spotlight** — cover photo as full-viewport background, booking card floating over it.
- **Gradient Header** — bold full-width colour block header.
- **Minimal Focus** — slim sticky top bar, maximum focus on the booking steps.
- **App Tabs** — three tabs: Book / Our Team / About. Compact and mobile-native.

Live preview

The theme picker shows your actual booking page in a live preview. Clicking any theme or layout updates the preview instantly. Nothing changes for customers until you click Save.

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Going live

Your booking page is already live at your subdomain once your account is approved — no publish button needed.

Sharing your link

- Add to your Instagram or Facebook bio
- Print your QR code for counter, window, or flyers (available under QR Code in the sidebar)
- Share directly in WhatsApp conversations
- Link from your existing website

Auto-generated policies

Your booking page automatically includes a Policies page linked from the footer, covering Terms & Conditions, Privacy Policy, and Cancellation & Refund Policy. These are generated in your business name and are required for Razorpay live payments.

IF SOMETHING DOESN'T LOOK RIGHT

Most display issues are caching — try a hard refresh (Ctrl+Shift+R on desktop, or clear cache on mobile).

BEFORE YOU GO

Frequently asked questions

Do I need a credit card for the 14-day trial?

No. Sign up, set up your booking page, and start taking real bookings — all without entering any payment details. You only pay the setup fee when you decide to continue after the trial.

How will I know when my account is approved?

You will receive both an email and a WhatsApp message on the number you verified at signup. The WhatsApp message includes a direct link to your live booking page and your admin dashboard. Approval usually happens within a short time of signing up.

Where do I pay the setup fee and monthly subscription?

Go to Settings → Billing in your admin sidebar. The page shows your current plan, trial status, and any payments due with the full GST breakdown (base + 18% GST = total). Click the Pay button to open Razorpay checkout and pay by UPI, card, or netbanking.

How do I get a GST invoice for my payment?

After each confirmed payment, an invoice link appears in the Payment history table on the Billing page — e.g. “AQ/2026-27/0001”. Click it to open the full GST tax invoice in a new tab. Click Print / Save as PDF to save it. The invoice includes your GSTIN details, SAC 998313, and CGST+SGST or IGST split depending on your state.

What happens if I miss the monthly payment deadline?

You get a 5-day grace period after the due date. During the grace period your booking page stays live and you can pay at any time from the Billing page to avoid suspension. If the grace period passes without payment, your booking page is temporarily suspended and you receive an email. Paying immediately reactivates it.

Does my money pass through Appointiqa?

No. You connect your own Razorpay account and every customer payment settles directly into it. Appointiqa never holds, touches, or sees your booking revenue. The subscription fee you pay us is entirely separate.

What are the policies shown on my booking page?

Appointiqa automatically generates a Terms & Conditions, Privacy Policy, and Cancellation & Refund Policy page for your booking page. These are in your business name and are linked from your booking page footer. They are required for Razorpay live payments.

How do WhatsApp notifications work?

Included in all plans. By default, messages come from Appointiqa's verified WhatsApp Business number with your business name in the text. If you prefer messages to come from your own registered business number, we set that up for you at no monthly charge from us.

Can I change my plan later?

Yes. Contact us and we will move you to the right plan. The setup fee difference is settled at that point.

Can I reschedule or cancel individual sessions in a recurring series?

Yes. Each session in a series is independent. You can reschedule or cancel any single session without affecting the others. You can also cancel the entire remaining series in one action.

What is auto-assign staff?

Auto-assign routes each booking to the team member with fewest bookings that day — balancing the workload automatically. Use it for services where the customer doesn't have a preference for a specific person.

I didn't receive my WhatsApp verification code during signup.

Wait 30 seconds and click "Resend code." Check that the number entered is active on WhatsApp. You can request up to 3 codes per hour.