



How To Guide on Setting up a provider and their book

[Opening a book \(& adding a provider\)](#)

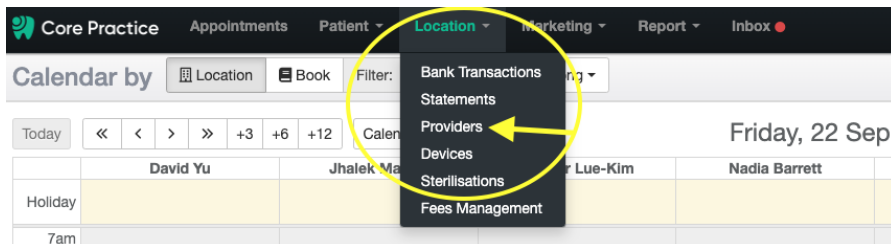
[Closing a book for Leave or Public holidays](#)

[Edit Agenda & working hours](#)

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Opening a book (& adding a provider)

Step 1: Log into core, and select the drop down menu at the top of the page called “Location”, then on the drop down menu select “Providers”.



Step 2: Once you select providers, it will take you to another page. Here you need to select “Setup New Provider” at the top right corner.



Step 3: It will take you to a setup screen, you will need to fill out the details in the “About” section, but leave the “Payment details” as they are. Then press “Save and continue”

The screenshot shows the provider setup form. The 'About' section has four red arrows pointing to the 'Title (Optional)', 'First name', 'Last name', and 'Job title (Optional)' fields. The 'Payment details' section is partially visible, showing a 'Commission' dropdown set to 'FlatRate 40.00%' and 'Gross'. At the bottom, there are two buttons: 'Complete Later' and 'Save & Continue', with a red arrow pointing to the latter.

Step 4: You will then be able to select their working hours, days the calendar will be open and create their Core user log in. If they already have a core login you can select “Current user” and associate that login with that calendar.

Calendar Setup

On this page we will configure this provider's bookings calendar and set up a user account for them.

Calendar details

Work time From 08:00 To 18:00
What time is your first appointment? What time do you finish your last appointment?

Days worked M T W T F S S

Scheduled break Yes No

Break Time From 12:00 To 13:00

User Account details

In this section we are going to assign a Core Practice User Account to this provider so they can use the website.

User Account Current user Invite user
Do you want us to associate this provider with the current logged in User Account? Or Invite someone to create a user account for this provider?

Step 5: Once you have selected “Save & Finish” it will take you to a screen which will show you all of their details set-up. Make sure to put in their provider number and your terminal merchant ID for claiming.

Provider Details

Complete Banking Details Now?
The banking details for this provider is incomplete, select [here](#) to complete the banking details for this provider.

Business* Dr Molly Brown User* mollybrown013@gmail.com Status* Active

Job title Dentist Title Dr

First name* Molly Last name* Brown

Business No Tax file number

Provider number* **Payee Provider number*** **Merchant ID***

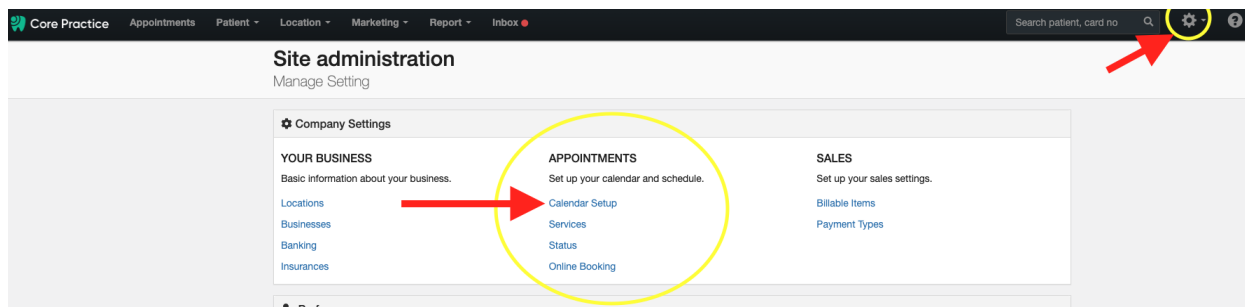
Letterhead* Dental Boutique Deepdene - Letter head Tracking Tracking

Collection code* Expense code* Lab account code*

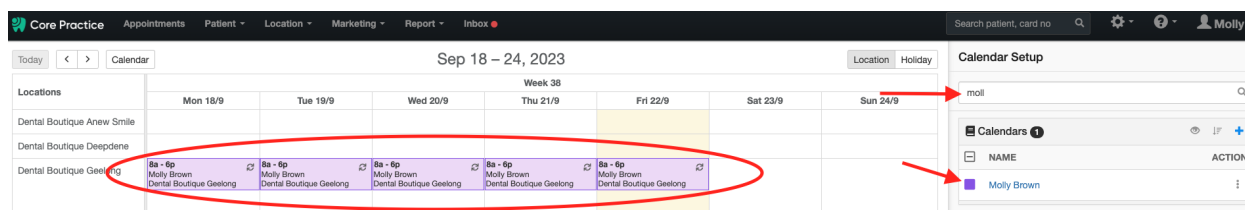
Step 6: Now, when you go back into your location calendar you will see that their calendar has now appeared and it is open to book patients.

Closing a book for Leave or Public holidays

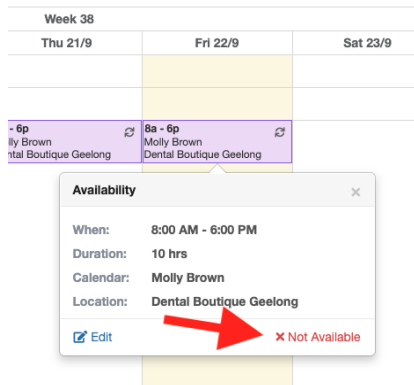
Step 1: Go into the settings area on core, and it will take you to “Site Administration”. Here you will see “Appointments” under this drop down, Select “Calendar Setup”



Step 2: This will take you to the calendar setup section, search the calendar you want to edit in the search bar and select that calendar.



Step 3: Select the day you are needing to close, and a pop up will appear. Click the “Not Available” click on not available.



Step 4: Select the dates that you want to close off, making sure that when you are selecting the “End” date, it is the date you want them to be back in the clinic, not the last day of their holidays. Example: If Dr Brown is away from the 22nd-29th and back to work on the 30th, the “End” date will be the 30th.

New Event Complete all required fields

Note
Create an event for this calendar such as leave or holiday to restrict new appointments from being added to this availability.

Event details

Calendar: **Molly Brown**

When: for 8 days

Start * 22/09/2023

End * 30/09/2023

Title: * Holidays

Type: * Unavailable

Note: Additional notes

Save Changes Discard

Your dates will now be blocked off.

To undo this, just click on the date and the event created, then “delete”

Week 38

Thu 21/9	Fri 22/9	Sat 23/9
8a - 6p Molly Brown Dental Boutique Geelong	8a - 6p Molly Brown Dental Boutique Geelong	

Availability

When: 8:00 AM - 6:00 PM

Duration: 10 hrs

Calendar: Molly Brown

Location: Dental Boutique Geelong

Events:
Unavailable - Holidays (All day)

Edit

Edit Event Complete all required fields

Event details

Calendar: **Molly Brown**

When: Fri 22/Sep/2023 for 8 days

Start * 22/09/2023

End * 30/09/2023

Title: * Holidays

Type: * Unavailable

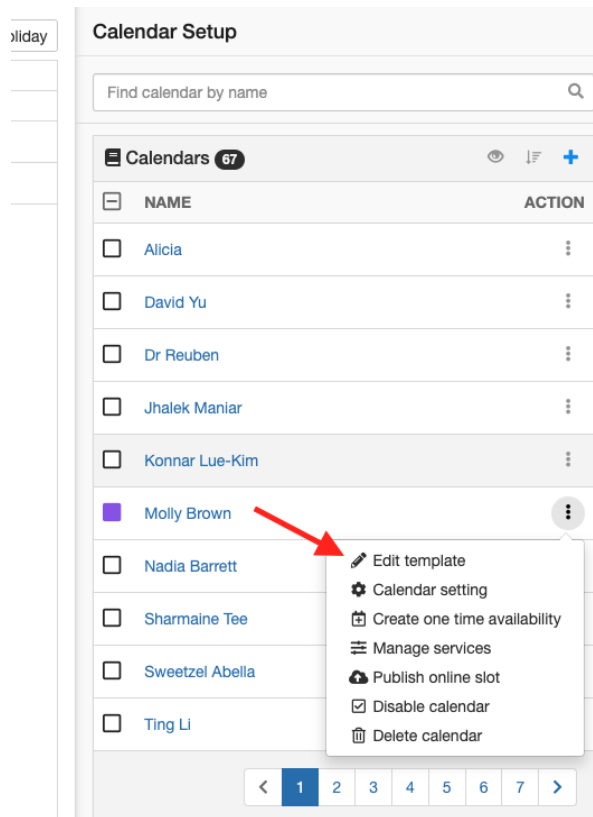
Note: Additional notes

Save Changes Discard Delete

Edit Agenda & working hours

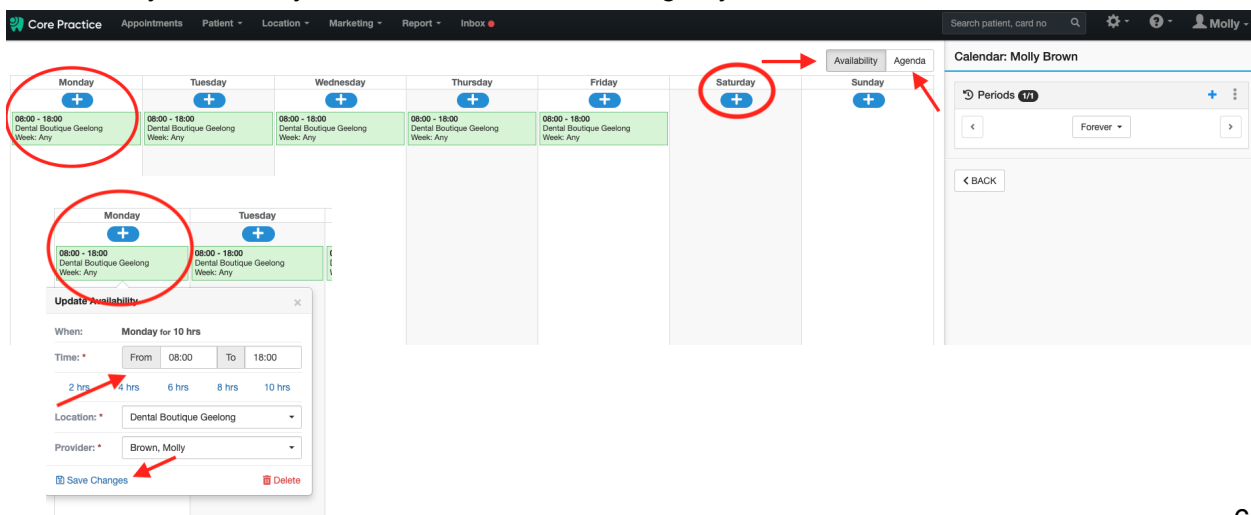
Step 1: follow steps 1 & 2 from “Closing a book for Leave or Public Holidays”.

Step 2: When you select the name of the clinician you are editing, click on the 3 dots at the end of their name, and then click on “Edit template”



Step 3: This will bring you to two sections, you have the option for either “Availability” or “Agenda”

First you will be in availability, here you can click on any day and change the working times, delete a day or the + symbol to add another working day.



Step 4: If you click on the “Agenda” Tab, this will take you to the set up of their book and you can add pre blocks in their schedule.

Be sure to select the correct pre block you are wanting, if you want the pre block to be “In Front of the book” make sure you select an “Event” if you want it to be Behind the book or Shaded which means someone can book over this pre block, you need to select “Presets”

The screenshot shows the 'Calendar: Molly Brown' interface. On the left, there are two sections: 'Events' and 'Presets'. The 'Events' section includes options like 'Lunch', 'No Appointment', 'No Online Booking', and 'Default Event'. The 'Presets' section includes 'New Patient Appointments', 'Emergency only', 'Admin Time', and 'Default Preset'. A note explains that items should be dragged and dropped onto white availability slots. Red arrows point from the 'Events' section to a blue event block on the calendar labeled 'IN FRONT OF THE BOOK' and from the 'Presets' section to a pink shaded block labeled 'BEHIND THE BOOK'. Another red arrow points to the blue event block with the text 'IN FRONT', and another points to the pink shaded block with 'BEHIND / SHADED'. The calendar grid shows dates from 20/9 to 24/9, with a 'Holidays' block on 22/9.

Step 5: If you want to change the color or name of these preblocks, when you have dragged and dropped onto your calendar, click on the pre block, a box will appear - you can change the color or name.

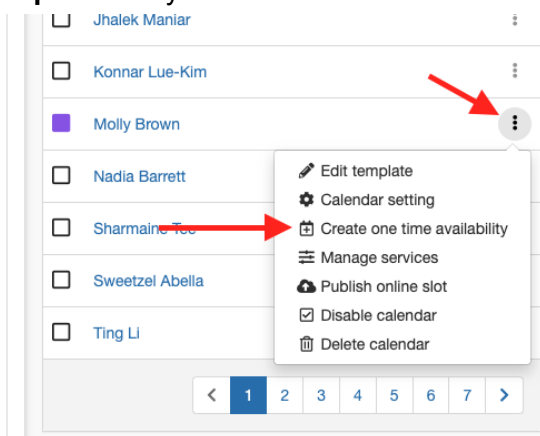
The screenshot shows an 'Update Event' dialog box overlaid on a calendar. The dialog has fields for 'Title' (set to 'Emergency only'), 'Colour' (set to '#fce4ec'), 'Time' (From 10:00 To 11:00), 'Where' (Friday for 1 hrs), 'Where:' (Dental Boutique Geelong), 'Type' (Preset), and 'Online Booking' (Available/No). There are 'Save Changes' and 'Delete' buttons at the bottom. Red arrows point to the 'Title' and 'Colour' fields.

Create one time availability

Example: A clinician works Mon-Fri but they are needing to open a Saturday to see a patient.

Step 1: Follow steps 1 & 2 from “Edit agenda & Working hours”

Step 2: once you have selected the 3 dots, click on “One time availability”



Step 3: A pop up will appear on the right hand side of your screen, here you can fill in the date you want to open and the times, click “Save Changes”. This day will now be open.

The screenshot shows a pop-up form titled 'New Availability: Molly Brown'. It has a 'Holiday' toggle on the left. The form contains the following fields:

- When ***: 23/09/2023
- Time ***: From 08:00 To 16:00. Below this are buttons for 2 hrs, 4 hrs, 6 hrs, 8 hrs, and 10 hrs.
- Location ***: Dental Boutique Deepdene
- Provider ***: brown, Molly
- Break**: A section with a 'GENERATE' button and a 'Generate breaks for this availability' button.
- Title ***: Lunch
- Time**: From 12:00 To 13:00

At the bottom, there are 'Save Changes' and 'Cancel' buttons. Red arrows point to the 'When' field, the 'Time' field, and the 'Save Changes' button.

Any further questions: Please contact molly@dentalboutique.com.au