



STAFF GUIDE · GRADESPACE CLINIC

Running your clinic's website: a guide for your team

Everything your team needs to run the website day to day, in plain words.

Gradespace Clinic
for WordPress, version 0.2.4

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This guide shows you how to run the clinic's website day to day: appointments, patients, the shop and the till. You don't need any technical knowledge.

Features marked **(Pro)** need a Pro or Agency licence. Features marked **(WooCommerce)** appear when the free WooCommerce plugin is installed.

1. Signing in

- Go to your website's address followed by **/wp-admin** (for example `yourclinic.com/wp-admin`), or click **Staff sign-in** at the very bottom of any page. The sign-in page shows your logo on one side and the form on the other.
- Sign in with your own username and password. Please **don't share accounts**: the website records who did what, and each person should only see what their job needs.
- After signing in you go straight to **Clinic → Today**.
- Forgotten your password? Click **Lost your password?** on the sign-in page.
- After 5 wrong passwords, sign-in pauses for 15 minutes. This protects the site. Wait, then try again, or ask your administrator.

Customers sign in somewhere else, on **My account** on the website itself. That's where they see their orders and appointments.

2. Your daily start: Clinic → Today

Today shows everything that needs attention:

- **Appointments today**, in time order, with buttons to **Confirm**, **Arrived**, **Completed**, **No-show** or **Cancel**.
- **Requests waiting to be confirmed**.
- **Shop (WooCommerce)**: today's sales (online and in store), bank transfers waiting for you to check, orders to be paid at the store, and anything low or out of stock.
- **Patients**: a quick search box.

The numbers in red circles on the left-hand menu show how many things are waiting, for example two bookings to confirm.

3. Appointments

When someone books online

1. The patient chooses a service, a day and a time on your website's booking page. The website only offers times when the clinic is open and free.
2. You get an email, and the booking appears in **Clinic → Appointments** as waiting to confirm.
3. Call or message the patient if you need to, then click **Confirm**. The patient is emailed automatically.

4. On the day, click **Arrived** when they come in and **Completed** when they leave. The patient's "last visit" is updated.

Patients get a reminder email the day before. Every email has a link they can use to cancel. If they cancel, you're emailed and the time becomes free again.

Booking someone by phone or as a walk-in

Clinic → Calendar → Add an appointment. Search for the patient (or add a new one), choose the service, then pick a free time. The patient is emailed if you entered their email address.

Changing a time

Open the appointment and change the date or time. The patient is emailed.

Calendar views

Clinic → Calendar has three views: **Day**, **Week** and **Month**. Week shows each appointment at its time, coloured and labelled by status. Month shows each day's count and how many are waiting; click a day to open it.

Opening hours, bank holidays and days you're closed are set in **Clinic → Settings → Opening hours**. The website never offers a time when you're closed. Add holidays whose dates change each year (such as Easter) at the start of each year.

4. Patients

Clinic → Patients lists every patient with their patient number. You can search by name, phone number (in any format), email or patient number. **Add patient** adds someone new.

Each patient's record shows:

- **Details:** name, phone, email, date of birth, address, emergency contact, and short front-desk notes (for example "uses a wheelchair"). **Don't put clinical notes here.**
- **Prescriptions:** spectacles or contact lenses, with **Print**. Only optometrists can add or change a prescription. A wrong prescription is **voided** with a reason, never deleted.
- **Appointments** and **purchases**, so you can see their history at a glance.
- **Website account:** if the patient has an account on the website, link it here and they'll see their prescriptions on My account. Only link it once you're sure it's really them.
- **Possible duplicate:** a warning appears when someone books with a known phone number but a different email. Check whether it's the same person.

Privacy:

- Every time someone opens, changes or prints a record, the website notes who and when. Administrators can see this.
- If a patient asks for a copy of their data, or asks you to delete it, an administrator uses **Tools → Export Personal Data** or **Tools → Erase Personal Data**.
- Deleting a patient means typing their patient number to confirm. It can't be undone.
- **Patients → Due for review** lists records that haven't been used for longer than the time set in **Clinic → Settings → Records**. Nothing is deleted automatically: an administrator ticks the ones there's no reason to keep and chooses **Delete selected**.

5. The shop (WooCommerce)

Online orders

Customers pay in one of two ways:

- **Bank transfer.** They see your account details, pay, and **upload a screenshot or receipt** on their order page. You get an email, and the order appears under **Clinic → Shop orders**. Check your bank, then click **Payment received — confirm**. If the money hasn't arrived, click **Not received**; the customer is emailed and asked to check.
- **Pay at the store.** The order is held for them to collect and pay. When they collect it, mark the order **Completed**.

Glasses that need a prescription: the customer either uploads their prescription, says they'll bring it, or asks you to use their eye test from the clinic. You'll see which on the order.

Selling in the clinic: Clinic → Sell in store (Pro)

1. Search for a product by name or code, or scan its barcode.
2. Change quantities, and add a discount if needed.
3. Link the sale to a patient if you like (optional).
4. Choose how they paid: **Cash** (enter the amount given and the website shows the change), **POS card**, **Bank transfer**, or **Split**.
5. Complete the sale. Stock goes down automatically.
6. **Print** the receipt, or send it by **WhatsApp** or **email**.

Stock: Clinic → Stock (Pro)

- Change a quantity with **+** / **-**, or type the number. It saves by itself.
- **Receive** when a delivery arrives: enter how many came in, and the supplier if you like.
- **Adjust** when something is damaged, lost, returned or miscounted: choose the reason.
- **History** shows every change, including every sale.

- **New product** adds an item in seconds: name, price, code, quantity and photo. Untick "show in the online shop" for items sold only in the clinic.
- Filter to low or out-of-stock items to see what to reorder, and **Download CSV** for a spreadsheet.

6. Settings (administrators)

Clinic → Settings has tabs. Each tab has its own **Save changes** button.

Tab	What's there
Business	Clinic and company name, logo, tagline, a photo and a bottom line for the staff sign-in page, social media links, and the registration line printed on prescriptions
Contact	Phone numbers, WhatsApp, email, address, map link
Email	Where new bookings and orders are emailed, the sender name and address, which emails patients get, Send a test email , and the email log (Pro)
Privacy	The cookie banner and the details used in your privacy and cookie pages
Payments	Your bank account(s), shown at checkout and in order emails, and how long pay-at-the-store orders are held (WooCommerce)
Opening hours	Weekly hours, bank holidays, days closed
Bookings	How often start times are offered, the gap after each appointment, earliest and latest booking, a note above the booking form
Records	How long patient records are kept before they're listed for review
Licence	Your licence key (also under Settings → Gradespace licence)

Run setup again on the Settings screen reopens the setup wizard.

Clinic → Services: the services people can book, with duration and price. Untick "bookable" to show a service on the website without letting people book it online.

Clinic → Staff access: to add a colleague, click **Add staff member**, then choose their role:

- **Front desk** for reception staff;
- **Optometrist** for the eye-care team;
- **Shop manager** for someone who only runs the shop (WooCommerce).

With a Pro licence you can also tick exactly what each role can do. Give **Administrator** only to the owner and one deputy.

Site Settings → Design & colours: choose the website's look (three designs, seven colour palettes). You can preview privately before saving.

7. Editing the website's pages

- **Pages** (Home, About, Services, Contact, Questions): open a page and click any text or picture to change it. Click **Save**.
- **Blog posts: Posts → Add New Post.** Add a title, text and a featured image, then **Publish**.
- **Opening hours, phone numbers and addresses** on the website come from **Clinic → Settings**. Change them there once and every page, email and receipt updates.

8. Good habits

- **Confirm online bookings the same day.**
- **Check Clinic → Today** each morning, and **Shop orders** for bank transfers.
- **Never** type card numbers, passwords or clinical notes into the website.
- If an email doesn't seem to arrive, look at **Clinic → Settings → Email → Email log** (Pro). It shows whether each email was sent and, if not, why.
- If something looks wrong, take a screenshot and send it to whoever looks after your website.

Help

Your website runs on **Gradespace Clinic**. Step-by-step install and licence help:

thegradespace.com/wordpress-kits/getting-started. Questions: support@thegradespace.com. Tell us what you were doing, what you expected, and send a screenshot.