

Creating and Managing Services or Activities or Types of appointments

A service is given by a staff member to one or more clients, maybe with one or more resources.

Adding a Service

Navigate to the **Dashboard** at the top left corner of the screen, click on **Settings**, (if you have more than 1 location) select your location from the dropdown menu in the top middle of the screen, within the online scheduling settings select **Services**.

Click on **Add Service** to display the page where you can define your service.

When creating a new service, you have to name it (in one language or several). You can provide a description (rich-text) along with a price and a capacity.

The capacity is the maximum number of appointments that can be booked within a single timeslot. For instance, a yoga class has a capacity of 12 persons (ie: attendees, participants, seats), while a hair-dresser can only perform 1 haircut at a time.

Duration time & Buffer time

The service duration is mandatory. If the staff needs some time after the appointment before the new one (transportation from one appointment to the other, cleaning time, report in the CRM update or simply a short break), you can block it as buffer time. For hotels, you can enable the service as **Overnight**, so that it can be booked from one day to the other.

Staff & resources

The service will be performed by one (or one among several staffs) staff and may require one or several resources (eg: meeting room, car, medical kit, specific chair).

Click on **Link staff members** to define who can be assigned to this kind of appointment:

Other parameters

- You can restrict the maximum number of appointments on a single day.

- You can enable this service to be booked several times in a row (eg: two consecutive driving lessons)
- You can determine whether a service can be booked from the public widget or only from the backoffice. You can also hide this service from the public widget while still referring to it via a GET parameters when sending out an emailing with a direct link for your clients to access the booking of this specific service
- You can choose to duplicate an existing service
- If you want to give access to some resources, you can also link resources to them. This means each time a given service is booked, all resources linked to it will be booked as well. If for a time slot the total amount of any resource linked to a service is booked, the service will not be bookable in that time slot.

Linked resources

It is now possible to define resources required to perform the service (eg: meeting room, car, medical kit). In this case, all resources will be booked along a scheduled event for this service.

Service picture

You can illustrate the service with a picture.

Editing a Service

Navigate to the **Dashboard** at the top left corner of the screen, click on **Settings**, (if you have more than 1 location) select your location from the dropdown menu in the top middle of the screen, within the online scheduling settings select **Services**, and select any existing service you wish to edit. From here you can change things like the name, price availability, and duration of a service.

Creating Service Groups

You can group services, either to categorize them, and make their browsing easier. You can use groups to help your customers identify the services that are relevant for them. For instance:

- Two groups for an insurance company: *I am not a customer*, and *I am a customer*
- Three groups for a hairdresser: *Women*, *Men*, *Children*

Of course, you can apply this differently depending on your business requirements:

Navigate to the **dashboard** at the top left corner of the screen, click on **Settings**, (if you have more than 1 location) select your location from the dropdown menu in the top middle of the screen, within

the online scheduling settings select **Services**, and click **Groups** next to **List**, and click on **Add Group**. On the services page, select **Groups** and click on **+ Add Group**.

WARNING: When you create a group, all services that do not belong to a group will not be displayed in your widget. You will have to assign them to a group. The group configuration simply consists of a name, a colour and a list of assigned services: