

# Creating and Managing Staff Members

**Staff are the employees or teammates handling a service for an appointment with a client, and able to provide access to the resource required for the service. The availability of a service depends on the staff's own calendar and optional resources.**

## Adding a Staff Member

Navigate to the **Dashboard**, click on **Settings** on the left below "Scheduling", select **Staff**, click on **Add Staff Member**, and fill in all pertinent information.

## Editing a Staff Member's Information

### Contact Information and Role

Navigate to the **Dashboard**, click on **Settings** on the left below "Scheduling", select **Staff**, and click on the staff member you would like to edit or add information to. From here you can easily enter all of your staff member's contact info like their full name, phone number, and email address.

**Color:** By choosing a color, you will be able to differentiate a staff member's appointment in the weekly view.

**Role:** Select the role you want to assign to your staff member:

- None: Your staff member will not login
- Admin: will be able to perform any action
- Schedule: will be able to manage appointments
- Read: will only access their appointments

**Staff member available for online scheduling:** Checking this box to make your staff member available for online booking. If left unchecked, this staff member will not be booked using the online scheduling.

**Staff Member Hours:** By default, your staff member will be assigned the company's working hours. These hours can be customized by dragging the hour period and removed with the gear icon on the side. If you want to temporarily change a staff's work schedule, you can set custom periods (eg: temporary part-time, expected overtime for a specific month). During this period of time, the custom work hours set in this section will apply instead of the regular one.

**Staff Photo:** You can add a picture for your staff member that will be shown to your client when booking an appointment.

**Calendar Sync:** In order to synchronize your staff's calendar, simply click on the link to invite. The link will bring you to an email template where you can enter the recipient's email address and a subject to invite them to synchronize their calendar.

**Note:** You need to enable this feature in your Calendar Sync settings.

**External iCalendar URL:** You can enter the ICS URL of a calendar published online, be it a Microsoft Exchange calendar of your availability, an iCloud calendar or a shared calendar of all bank-holidays in your country.

## Advanced Settings

At the top of the screen click **Advanced**.

**Staff Member Services:** Check and uncheck different services to determine what that staff member can be booked for. You can also set a custom price for this staff member for each service by typing it inside the price box.

**Vacation periods:** Set a staff member to be unavailable for booking due to a holiday or vacation by clicking the **Add vacation** button then entering a start and end date.

## Creating and Managing Staff Groups

To manage your staff members groups, go to your **Dashboard**, click on **Settings**, select **Staff**, navigate to **Groups** along the top of the page, and click on **Add Group**. To edit a group, navigate to the Groups page as previously mentioned and click on an existing group.

**Name:** This will help you identify the staff members groups. It will not be displayed in the booking widget. But it can be useful as a filter on your calendar view.

**Color:** This color will be used in the dashboard calendar.

**Group Members Working Hours:** By default, your staff members group will be assigned the company's working hours. Simply drag and drop to modify this time frame. By clicking the gear on the right you can delete the time slot or copy a time frame so you can repeat it for another day instead of dragging it and recreating it constantly.

**Custom Periods:** Customize your working hours depending on vacations, inconvenience, blocked hours.

**Staff Member Included:** The last section of the page allows you to chose the staff member and consolidate it to the group