

Self-service options for clients

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Would you like to allow pre-approved clients the option to make their own bookings?

Then our new feature is perfect for you! You'll retain control in terms of who is able to book, what they can book & also the times available for them to book.

If you would like to find out more about this option, or to go ahead, please call our Customer Service team & they will activate your venue and talk you through the steps required to set it up to your specifications.

Client Bookings (Master Admin only)

- Display calendar page on client login?
- Allow clients to create their own bookings?
- Booking times are to be limited by specific slots?

[Display calendar page on client login](#)

This allows you the option to give all your clients read-only view of your calendar, ideal if you'd like them to view availability instead of contacting your administrators. A sample of this calendar is shown below:

1. Shire Health Centre

Harry Carlton

Dashboards Accounts Invoices **Calendar** Bookings Documents Help

Create a booking by drag and dropping on an empty area.
Edit/cancel an existing booking by clicking on it.

Calendar of Bookings

Location and account for bookings
Grange Park Training - Harry Carlton (KidsPlay)

Past Unavailable **Your Bookings** Monday, 19 March 2018 Change Date 19/03/2018

Note: Spaces marked with * may only be booked at the times Saturdays (09:00-17:00), Sundays (09:00-13:00), Weekdays (18:00-22:00)

Spaces	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm	9pm
6th Form												Unavailable				
Art Classroom																
Astro 1											Harry Carlton (KidsPlay)					
Astro 2											Harry Carlton (KidsPlay)					
Drama Studio												Unavailable				
Gym																
* Gym - User 1																
* Gym - User 2																
* Gym - User 3																
* Gym - User 4																
Main Hall												Unavailable				
Sports Hall Court 1													Unavailable			

There are no issues regarding confidentiality, as other bookings are simply shown as unavailable, while the

clients own bookings are shown in green with full details available to click.

Allow clients to make their own bookings

Once we've activated your venue, we will work through the following steps with you:

Step 1 - Client booking slots (Manage > Venue Management)

These have 2 purposes. Initially to set the general times you wish people to be able to book your facility. For example, if your bookings run from 6-10pm weekdays, you would need a booking slot for this, otherwise clients would be able to book any time over a 24 hour period!

The other purpose for these booking slots is to limit people to book certain time slots only (e.g. 6-7pm, 7-8pm), this may be useful if you only wish people to book only on the hour.

Client Booking Slots

Name	From	To	Days of the Week		
Weekdays	18:00	22:00	Monday, Tuesday, Wednesday, Thursday, Friday	Edit	Delete
Saturdays	09:00	17:00	Saturday	Edit	Delete
Sundays	09:00	13:00	Sunday	Edit	Delete
Gym 6-7pm	18:00	19:00	Monday, Tuesday, Wednesday, Thursday, Friday	Edit	Delete
Gym 7-8pm	19:00	20:00	Monday, Tuesday, Wednesday, Thursday, Friday	Edit	Delete
Gym 8-9pm	20:00	21:00	Monday, Tuesday, Wednesday, Thursday, Friday	Edit	Delete

Step 2 - Calendar categories (Manage > Venue Management)

The calendar categories that you have set up to group your rooms can be used to restrict the times available to book particular spaces, by linking them to your 'Client Booking Slots'. If the 'Use Slots?' is set to 'No', then the system will use the the longest time period set for that day (in your client booking slots), by default. In the example above, this would be 18:00 - 22:00 on weekdays, 09:00 - 17:00 on Saturdays, and 09:00 - 13:00 on Sundays. If the 'Use Slots?' is set to 'Yes' then the shorter time periods (18:00 - 19:00, 19:00 - 20:00, 20:00 - 21:00 on weekdays) will be used. If there are no 'Client Booking Slots' defined, then your clients will be able to book any time of the day for all spaces.

Calendar Categories

Name	Spaces	Use slots?		
Gym Users	4	Yes	Edit	Delete
Gym Membership	3	No	Edit	Delete
Conference & Education Facilities	11	No	Edit	Delete
Dance, Music and Drama Studios	3	No	Edit	Delete
Sports Facilities	7	No	Edit	Delete

[New Category](#)

An example of this would be when gym user bookings (in the screenshot above) are using hourly slots (e.g. 6-7, 7-8 etc), but the remaining spaces are bookable anytime between 6-10pm. The calendar category would be set to 'Use slots? - Yes' for the Gym Users category only to ensure that the specific short time periods are activated, for the relevant bookable spaces.

Step 3 - Bookable spaces

Each bookable space now has the option to 'Allow Client Bookings'. These will default to 'Yes', so please review each space and amend as required. If this is set to 'Yes', the bookable space will show on the clients calendar page for them to be able to view/make bookings against (if they are activated). Also, only the Standard rate on all of the Bookable Spaces will be shown to self service clients, so make sure it is populated correctly.

Bookable Spaces

Name	Allow Client bookings		
1. Venue Notes	No	Edit	Delete
6th Form Conference & Education Facilities	Yes	Edit	Delete
Annual Fee Gym Membership	No	Edit	Delete
Art Classroom Conference & Education Facilities	Yes	Edit	Delete
Astro 1 Sports Facilities	Yes	Edit	Delete

Step 4 - Client activation

Now you've defined your booking criteria, you can now give access to the clients you wish to be able to make their own bookings. This is done via the Edit Client function.

Edit Client

Allow this client to make their own bookings?

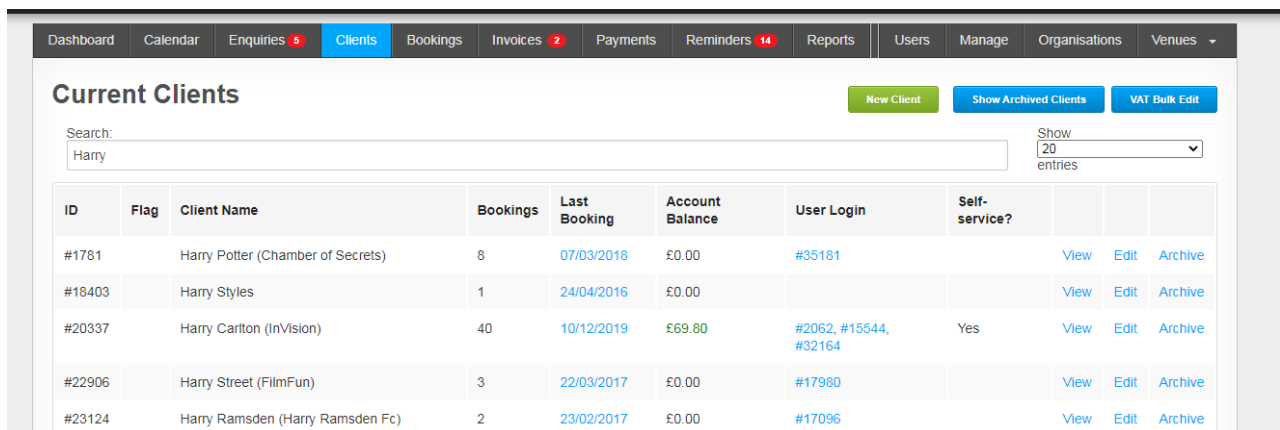
Limit the available spaces to book by category?

Select the allowed space categories below:

Conference & Education Facilities (11) Dance, Music and Drama Studios (3) Gym Membership (3) Gym Users (4) Sports Facilities (7)

When activating a client to make their own bookings, you'll be able to select from the list of calendar categories once you've ticked the 'Limit the available spaces to book by category?' option. If you wish them to have access to book all activated spaces, do not select this option.

You can easily see from the Client tab who has been given access to this function.



ID	Flag	Client Name	Bookings	Last Booking	Account Balance	User Login	Self-service?			
#1781		Harry Potter (Chamber of Secrets)	8	07/03/2018	£0.00	#35181				View Edit Archive
#18403		Harry Styles	1	24/04/2016	£0.00					View Edit Archive
#20337		Harry Carlton (InVision)	40	10/12/2019	£69.80	#2062, #15544, #32164	Yes			View Edit Archive
#22906		Harry Street (FilmFun)	3	22/03/2017	£0.00	#17980				View Edit Archive
#23124		Harry Ramsden (Harry Ramsden Fc)	2	23/02/2017	£0.00	#17096				View Edit Archive

Once this is done, we will set up a test client to ensure that the functionality is working correctly and the appropriate controls are in place.

The client account is designed to be intuitive, however we do have a step by step guide available in the online help which could be downloaded & sent out to your clients if required. [Client self-booking guide](#)