

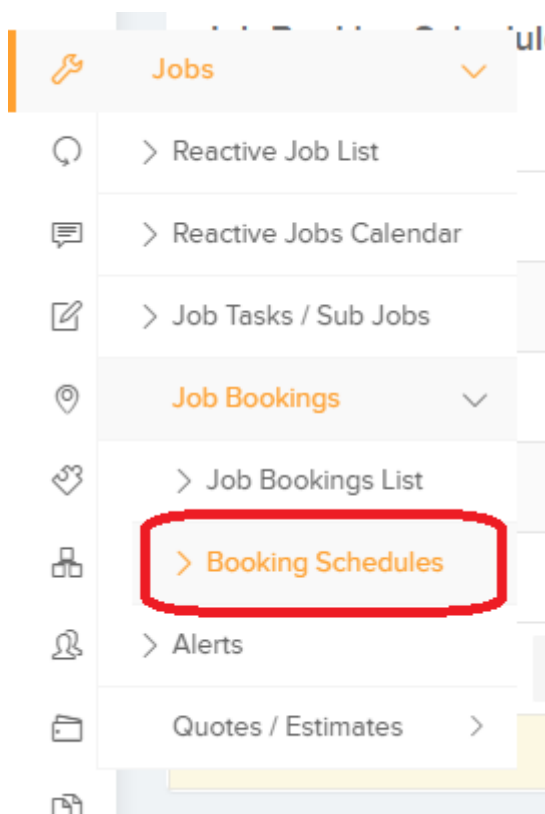
Booking Schedules and Job Booking

Booking Schedules

Booking Schedules are perfect for Facilities Management Companies who maintain public or private housing. These schedules can be set up and attached to Reactive Jobs or Planned Schedules. The booking schedule is attached to a job, then lets you send out a booking request email to end users (for example residents or job / site contacts). A link on this email will bring the job contact to a web page where they can then can pick a suitable time slot for the job visit.

Step 1.

From the Side Bar click Jobs – Job Bookings – Booking Schedules. This will bring you to the ‘Job Booking Schedules’ List.



Step 2.

To create a new Schedule click “Create Job Booking Schedule”

Here we have 4 sections to maintain.

Job Booking Schedule Information

- **Name** – The name of the job booking schedule
- **Exclude Weekends** – Exclude weekends when showing time slots for this schedule’s booking
- **Instruct Resource When Booking Made** – Instruct the resource as soon as the booking is made
- **Enable Key Job Event Notifications** – Notify for events such as job instructed, resource starts travel, starts task, completes task, expected date changed, etc
- **Booking Time Window** – Number of days that a job can be booked by the end user from the job due date
- **Booking Time Slots** – Once you have created the schedule you will then be able to add time slots from which the user can choose when booking.

Email Settings

- **Send Email When Booking Confirmed** – Email will be sent as soon as a booking is confirmed
- **Email Recipients For Booking Confirmation** – List of emails who will receive an email when a booking is confirmed
- **Team** – Choose a team and all the users and resources in that team will receive an email when a booking is confirmed
- **Enable Reminders** – If enabled, reminder will be sent to those who haven’t made a booking yet
- **Reminder Day Interval** – If reminders are enabled, reminder will be sent x days after the booking email is sent

Job Booking Email Template

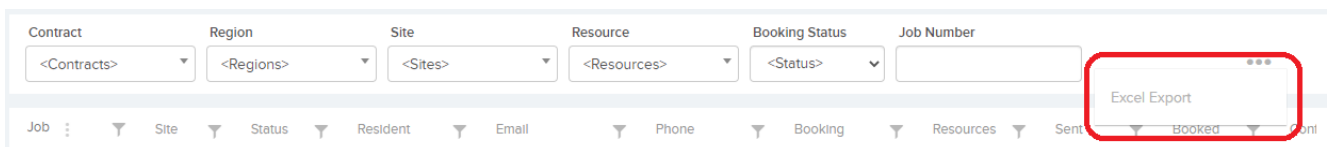
This email template is used when a booking email is sent to all the end users to make a job booking. You can place tags within the email template which will be replaced by relevant live data.

Job Booking Web Page Template

This web page will be displayed when the booking link is clicked from the email sent to make the job booking. You can place tags within this web-page template which will be replaced by relevant live data.

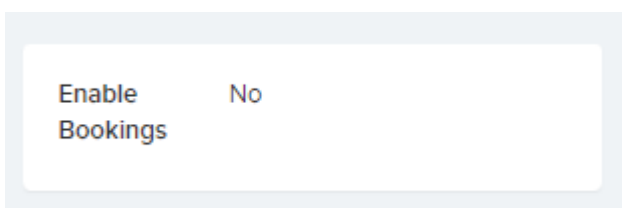
Job Booking List

This is the main list of all Job bookings. The list can be filtered using the filters along the top of the page and also exported to excel.



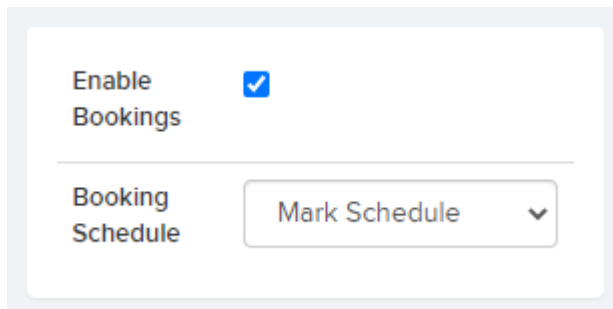
Job Bookings with Reactive Jobs

After creating a new Reactive Job you will be brought to the Job details page, where as per screenshot below “Enable Bookings” will be set to “No”.



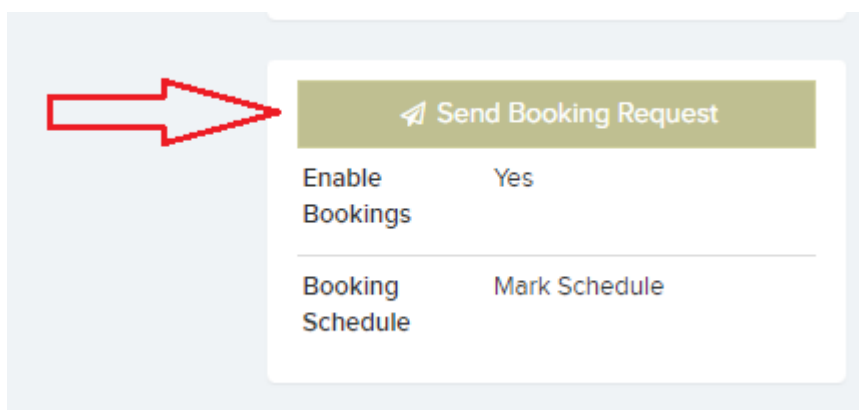
By editing the page this can be turned on and a specific

schedule (which you have already set up) chosen from the dropdown. Then click Save.

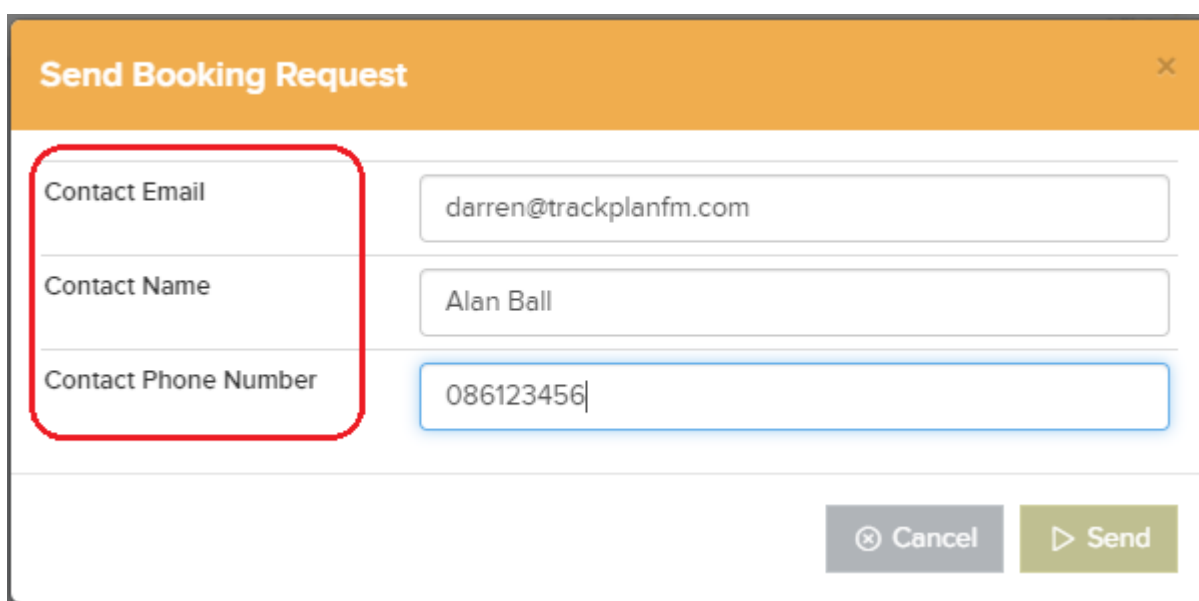


The screenshot shows a settings panel with two sections. The first section, 'Enable Bookings', has a blue checkmark in a box. The second section, 'Booking Schedule', features a dropdown menu currently displaying 'Mark Schedule' with a downward arrow icon.

Now we can 'Send Booking Request' to the tenant or site manager. This will bring up a pop up to confirm the Name, email address and phone number and click Send. An email will then be sent to the Tenant with a link to the booking Web page.



This image shows a close-up of the 'Send Booking Request' button, which is a green rectangle with a paper plane icon and the text 'Send Booking Request'. A red arrow points to this button from the left. Below the button, the 'Enable Bookings' status is shown as 'Yes' and the 'Booking Schedule' dropdown is set to 'Mark Schedule'.



The screenshot displays a modal window titled 'Send Booking Request' with an orange header and a close button (X). The form contains three input fields: 'Contact Email' with the value 'darren@trackplanfm.com', 'Contact Name' with the value 'Alan Ball', and 'Contact Phone Number' with the value '086123456'. A red rounded rectangle highlights the labels of these three fields. At the bottom right, there are two buttons: a grey 'Cancel' button with a close icon and a green 'Send' button with a play icon.

The Link on the Email will bring them to the Booking Page as seen below where they can choose a day and time for the Resource/Contractor/Engineer to arrive.

Please pick a suitable time from the available time slots

Site: Building Chiltern 3

Region: Chilterns

Address: , , , , ,

Comments:

Contact: Alan Ball

Available time slots for the booking:

01/11/2021

09:00

10:25

13:45

14:40

Comments

Please & Thank You

▶ Confirm

⊘ Decline

Once confirmed they will be brought to the below page. The Resource/Contractor/Engineer has been instructed and notified.

Your Job Booking Details:



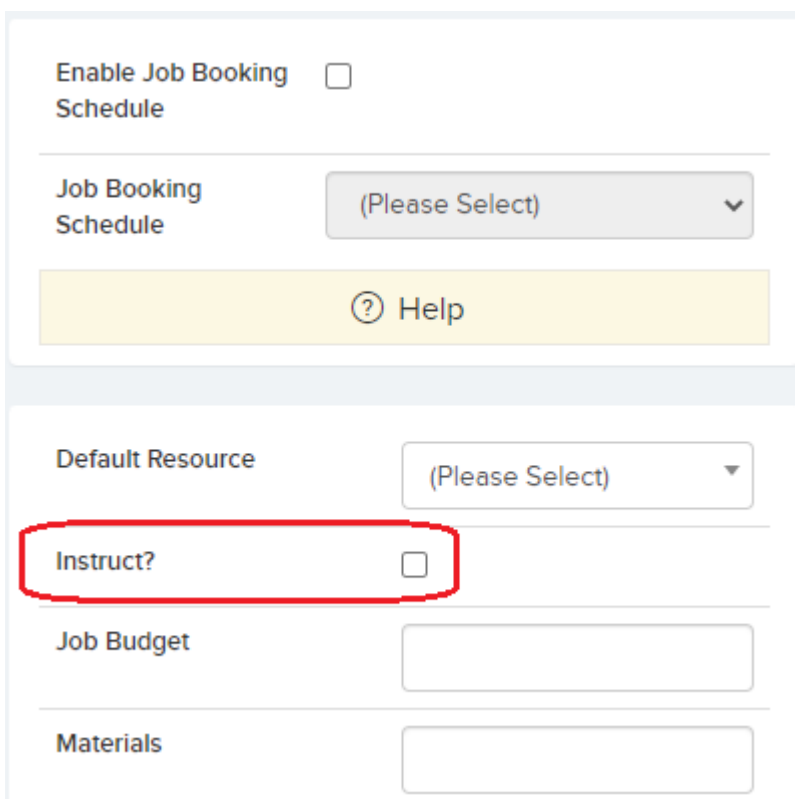
Date: 01/11/2021

Time: 10:25

Job Bookings with Planned Jobs

When creating a new Planned Schedule or Updating an existing one you have the option to 'Enable Job Booking Schedule' and to select the schedule from the dropdown.

Note that the 'Instruct?' setting will not be taken into consideration as the Job will be instructed once a booking has been confirmed.



The screenshot shows a web form for job bookings. It is divided into two main sections. The top section contains the 'Enable Job Booking Schedule' checkbox, which is currently unchecked. Below this is a 'Job Booking Schedule' dropdown menu showing '(Please Select)'. A yellow 'Help' button is located below the dropdown. The bottom section contains a 'Default Resource' dropdown menu also showing '(Please Select)'. Below this is the 'Instruct?' checkbox, which is highlighted with a red rectangular border and is currently unchecked. At the bottom of the form are two text input fields labeled 'Job Budget' and 'Materials'.

Enable Job Booking Schedule	<input type="checkbox"/>
Job Booking Schedule	(Please Select) ▼
? Help	
Default Resource	(Please Select) ▼
Instruct?	<input type="checkbox"/>
Job Budget	<input type="text"/>
Materials	<input type="text"/>

Once a Site is activated for that Planned Schedule, the Planned Job will be created and the email sent to the tenant, resident or site manager for him/her to select a day and time that suits them.