Event Templates

Administration · https://www.bookedscheduler.com/help/administration/event-templates/

Overview

Event Templates are an alternative to the more free-form reservation details page. They define the resources and accessories which will be booked, and allow customization of additional information such as duration and notification policies. Event Templates can be used to limit the choices a user must make during a reservation and can standardize the information being collected. Below are some example use cases for Event Templates , but their flexibility means they can adapt to your individual needs.

- Vendor tent reservations - Different collect different vendor information for each vendor type
- Baseball fields - Set different fields and reservation duration per league
- Room reservations - Send users through a simple, step by step reservation process with limited options

By default, event templates are enabled in Booked, but the standard reservation details page is still available. allowing for flexibility in the booking process. Direct links to Event Templates can be shared, easily allowing you to include them in emails or embed them in other websites. They are also available as a WordPress shortcode when using WordPress integration.

Creating a New Template

Application administrators are the only users who can create and manage Event Templates. The management tool is available under the Application Management section of the main application navigation.

Each template has an internal name, which is used to easily identify the unique template for management, and can include any internal notes to help describe the purpose or details of the template.

The Event Heading is a short, user-facing block of text that should help the user understand what they are booking. This will appear as the heading text on the reservation form. You can also include user facing notes, which can provide any details to the end user or even link out to external pages.

The Schedule, Resources and (optionally) Accessories are fixed for every reservation made from the template. These will be shown on the reservation form, but users making reservations will not have any option to change this.

All reservations created from a template can be set to use a specific color, as well, making them easily identifiable.

Reservation Attributes

By default, the custom attributes collected during event template based reservations will be the same as those collected during the standard reservation page. You have the option to collect specific reservation attributes for different templates. This allows very specific information to be collected for each template-based reservation.

Reservation Notice Policies

Reservation duration and timing policies can be configured at the template level, overriding those set for individual resources. By default, each schedule slot will appear as available reservation time, but this can be changed to use the template resource's minimum and maximum duration or to use a specific fixed duration.

Reservation minimum notice rules will use the configured value for the resources by default, but policies can be customized for each template. These rules for create, update, and delete notices are more flexible than what is available for resources.

Notice for new reservations can be set to a simple relative time, for example, requiring at least one hour notice before any new reservation.

This can also be set to a specific day and time of the week, which would require reservations to be created on Wednesday of next week at noon, for example. Setting the "Close" time of the reservation sets the maximum notice time for new reservations. Taking the "next Wednesday at noon" example, a close time of 1 week would set a maximum notice time of two Wednesdays from now.

New reservation notice times can also be set to a specific day of month, which would allow for only allowing new reservations starting on the first Monday of the month, for example.

The final option for new reservation notice times is a specific date of the month.

Reservation Images

By default, resource images will be shown on when creating new reservations for a template, but alternate images can be configured to be shown.

Sharing a Reservation Link

On the Event Templates management page, all templates will be listed. Each one has an option to copy a direct link to make new reservations using that template. This link can be embedded in other web pages or sent via email to give your users a quick way to book.

Browsing Reservations

When logged into Booked, users can select the New Reservation option under the Reservations of the main navigation. Here, users will see their most recently used templates followed by a list of all templates where they have permission to all template resources. Clicking the Reserve option will launch the user into the reservation workflow.

Charging for Reservations

Event Templates will use the same reservation cost rules as standard reservations. This means if any resources on the template have a cost set, the user will be prompted to provide payment information during the reservation workflow.

WordPress Integration

Event Templates are available as a WordPress shortcode, allowing reservation templates to be embedded directly in a WordPress site. The short code `booked_template` and requires a single parameter - `templateid`. The template id can be found in the Event Template management list.