

Booking Packages and Add-Ons in the Online Scheduler

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Overview

Turn your Proposal Templates into bookable packages in the Online Scheduler.

Instead of offering customers a single service at a single price, Proposal Templates let you bundle a base service with additional parts or services, create tiered packages, and offer optional upgrades customers can add while they book. As customers make their selections, pricing updates automatically so they can see exactly how their choices affect their total.



Before building your packages, you may want to review:

- Proposal and Project Templates – Learn how to create and configure reusable Proposal Templates.
- Proposal Options – Learn how to group items together and make them selectable by the customer.

This article will review:

- Add Proposal Packages to the Online Scheduler
- Common Package Recipes
- Helpful Tips

Add Proposal Packages to the Online Scheduler

1. Build Your Proposal Templates

Navigate to **Control Panel > Parts/Add-Ons** and select **Templates** in the top-right corner and create the packages you want to offer.

Templates					Parts	Categories	Templates	Vendors
1								
Add...	Name	Active?	Type	Service				
Edit	Appliance Repair with Appliance Care Upgrade	Yes	Proposal	Kitchen Appliance Repair				
Edit	Bronze Cleaning Package	Yes	Proposal	Standard House Cleaning				
Edit	Gold Cleaning Package	Yes	Proposal	Standard House Cleaning				
Edit	Silver Cleaning Package	Yes	Proposal	Standard House Cleaning				

Add your service line and any parts that should be included in the package. If you're offering customer-

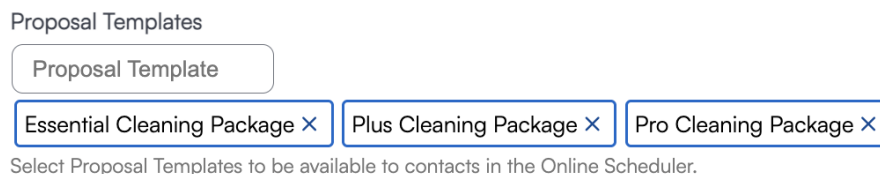
selectable upgrades, configure those items using Proposal Options.

2. Enable Templates for Online Booking

Once your templates are ready, choose which ones should be available to customers in the Online Scheduler.

Navigate to: **Control Panel > Scheduling**. Find the **Online Scheduling** section.

Under **Proposal Templates**, use the search bar to find and add the templates you want customers to be able to book.



Common Package Recipes

There's no single right way to build a bookable package. How you structure your templates depends on what you sell and how much choice you want to give customers during booking.

Here are a few approaches to consider.

Good–Better–Best Packages

A Good–Better–Best structure gives customers three clearly defined levels of service at different price points.

You might name these packages **Essential**, **Plus**, and **Pro**, for example:

Tier	Description
Essential	Your core offering with the essential service and features.
Plus	Everything included in Essential, plus additional products, features, or benefits.
Pro	Everything included in Plus, plus your most valuable upgrades or premium features.

Create each package as its own unique Proposal Template. Then, add the proposal templates to the online scheduler if desired.

This structure makes it easy for customers to compare their choices while creating natural opportunities to move from the basic service into a higher-value package.

Choose Your Service

Select the service you need and see your personalized pricing.

Service Packages 3

Essential Cleaning Package

\$175.00

A straightforward whole-home clean covering the essentials. Perfect for...
[Show more](#)

- ✓ **Standard House Cleaning**
Standard House Cleaning

Plus Cleaning Package

\$250.00

A more thorough whole-home cleaning with extra attention given ...
[Show more](#)

- ✓ **Standard House Cleaning**
Standard House Cleaning
- ✓ **Oven Interior Cleaning**
Deep cleaning of the oven interior, racks, and accessible interior...
[Show more](#)
- ✓ **Refrigerator Interior Cleaning**
Cleaning of accessible refrigerator shelves, drawers, and interior...
[Show more](#)

Pro Cleaning Package

\$325.00

Our most comprehensive cleaning package, combining a full-home...
[Show more](#)

- ✓ **Standard House Cleaning**
Standard House Cleaning
- ✓ **Additional Bathroom Cleaning**
Adds a full cleaning of one bathroom beyond the standard service scope,...
[Show more](#)
- ✓ **Interior Window Cleaning**
Interior cleaning of one standard-size window, including glass and...
[Show more](#)
- ✓ **Oven Interior Cleaning**
Deep cleaning of the oven interior, racks, and accessible interior...
[Show more](#)
- ✓ **Refrigerator Interior Cleaning**
Cleaning of accessible refrigerator shelves, drawers, and interior...
[Show more](#)
- ✓ **Bed Linen Change**
Removal of existing bed linens and installation of clean customer-...
[Show more](#)
- ✓ **Pet Hair Treatment**
Extra vacuuming and surface treatment for homes with significan...
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Summary

Standard House Cleaning	\$175.00
Additional Bathroom Cleaning	\$25.00
Interior Window Cleaning	\$8.00
Oven Interior Cleaning	\$40.00
Refrigerator Interior Cleaning	\$35.00
Bed Linen Change	\$12.00
Pet Hair Treatment	\$30.00
Package subtotal	\$325.00

Total \$325.00

[Pick an appointment](#)



Tip: Your packages don't have to be called Essential, Plus, and Pro. Use names that make sense for your services and clearly communicate how the packages differ.

Optional Upgrades

You can also start with one core package and use Proposal Options to let customers customize it.

Build the Proposal Template with:

1. Your main service.
2. Any parts or services that are always included.
3. Additional parts or services that you want to offer as optional upgrades.

Configure the upgrade items as **Proposal Options**. When the package appears in the Online Scheduler, customers can select or remove those options while booking.

As they make their selections, their running total updates to reflect the upgrades they've chosen.

For example, a base service could include optional upgrades such as:

- Premium materials
- Additional treatment areas
- Extended service
- Protective coatings

- Equipment upgrades
- Additional rooms or service areas

This gives you an upsell opportunity directly within the booking experience without requiring your customer to call or wait for someone from your team to recommend the upgrade.

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Service

Choose Your Service

Select the service you need and see your personalized pricing.

Service Packages

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Appliance Repair with Appliance Care Upgrade

\$129.00

Diagnostic and repair service for common kitchen appliances such as refrigerators, dishwashers, ovens, ranges, and...

[Show more](#)

✓ Kitchen Appliance Repair

Kitchen Appliance Repair

Customize your Appliance Repair with Appliance Care Upgrade plan

Optional add-ons

☐
Appliance Care Upgrade

Appliance Deep Clean · Preventive Maintenance
Inspection · Performance & Safety Test

+\$117.00

Combine Both Approaches

You don't have to choose between tiered packages and optional upgrades. You can create a Good–Better–Best structure and include optional add-ons within each package.

For example, a customer might select your **Silver Package** and then add one or two optional upgrades before completing their booking.

This gives customers a simple starting point while still allowing them to customize their purchase.

Helpful Tips

Make upgrade names customer-friendly

Part descriptions used on invoices and proposals don't display in the scheduler's options list. Customers see the **Part Name**, so make sure the name itself clearly explains what they're adding. Instead of a vague internal name like **Upgrade 1**, use something descriptive like **Premium Filter Upgrade** or **Add Second Treatment Area**.

Use Proposal Options for true upsells

If something is optional, consider adding it as a selectable Proposal Option rather than including it as a standard line item. That turns the item into an easy add/remove choice during booking and gives customers an opportunity to increase their purchase before they schedule.

Don't be surprised by a \$0 starting price

If your package is built entirely from optional items, it may initially display a \$0 total. Once the customer selects a priced option, the total updates based on their selections.

Make sure options-only packages can be booked

Customers cannot complete a booking for an options-only package until at least one priced option has been selected. If you don't want customers to reach the booking step without a selection, consider configuring an option to be selected by default.

Keep choices simple

More options don't always create a better booking experience. Focus on upgrades that are easy for a customer to understand and make sense to purchase without speaking to someone first. A few well-chosen add-ons can create a stronger upsell opportunity than a long list of small choices.
