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.

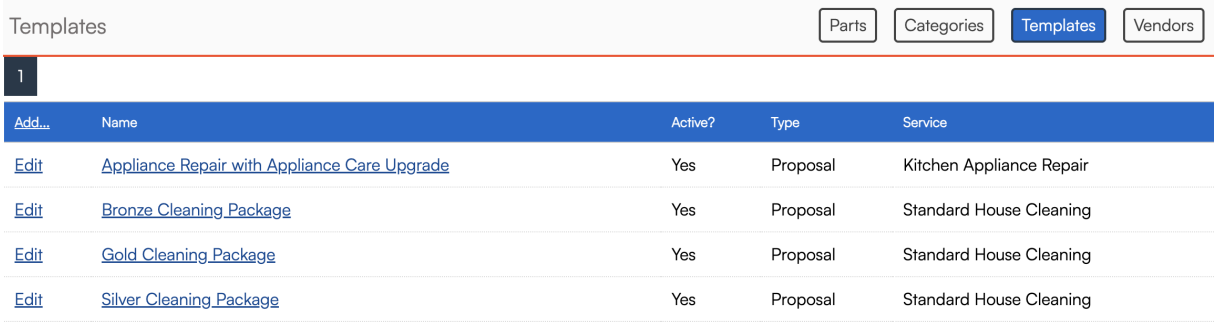
This article will review:

- Add Proposal Packages to the Online Scheduler
- Included Items and Optional Add-Ons
- 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.



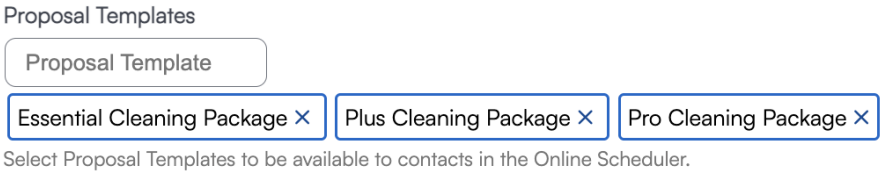
Add your service line and any parts that should be included in the package. If you're offering customer-selectable upgrades, configure those items using Proposal Options.

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.

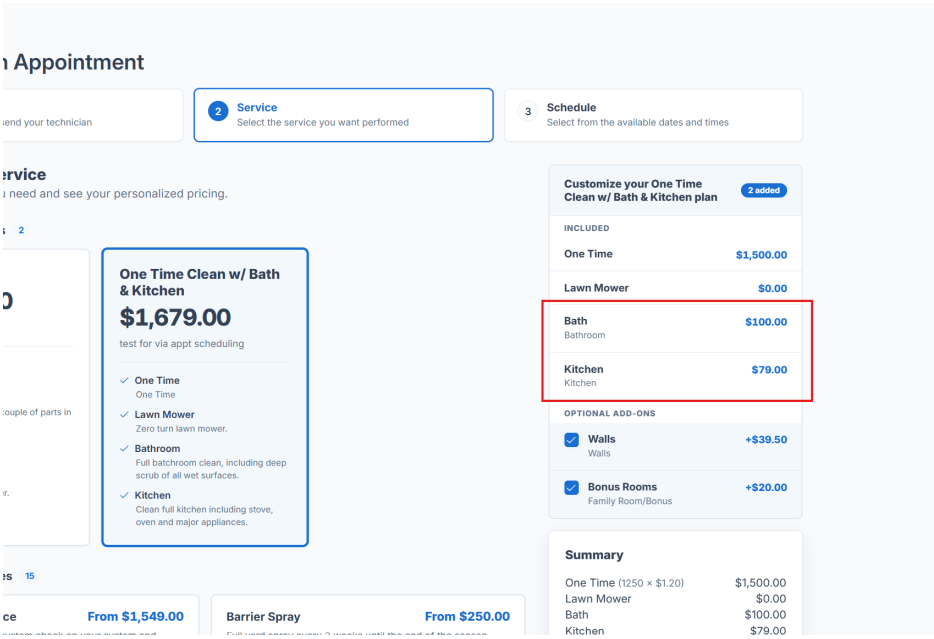


Included Items and Optional Add-Ons

When a customer picks a package, the scheduler shows what comes with it and what they can add:

- **Included:** The service, the parts that aren't in an option group, and any option you marked Required. Included items have no checkbox. They're always part of the booking and the price.
- **Optional add-ons:** Options the customer can choose. If you marked an option Pre-selected, it starts checked, and the customer can uncheck it.

You set Pre-selected and Required on the Proposal Template, in the Options Summary. SeeProposal and Project Templates for the steps.



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

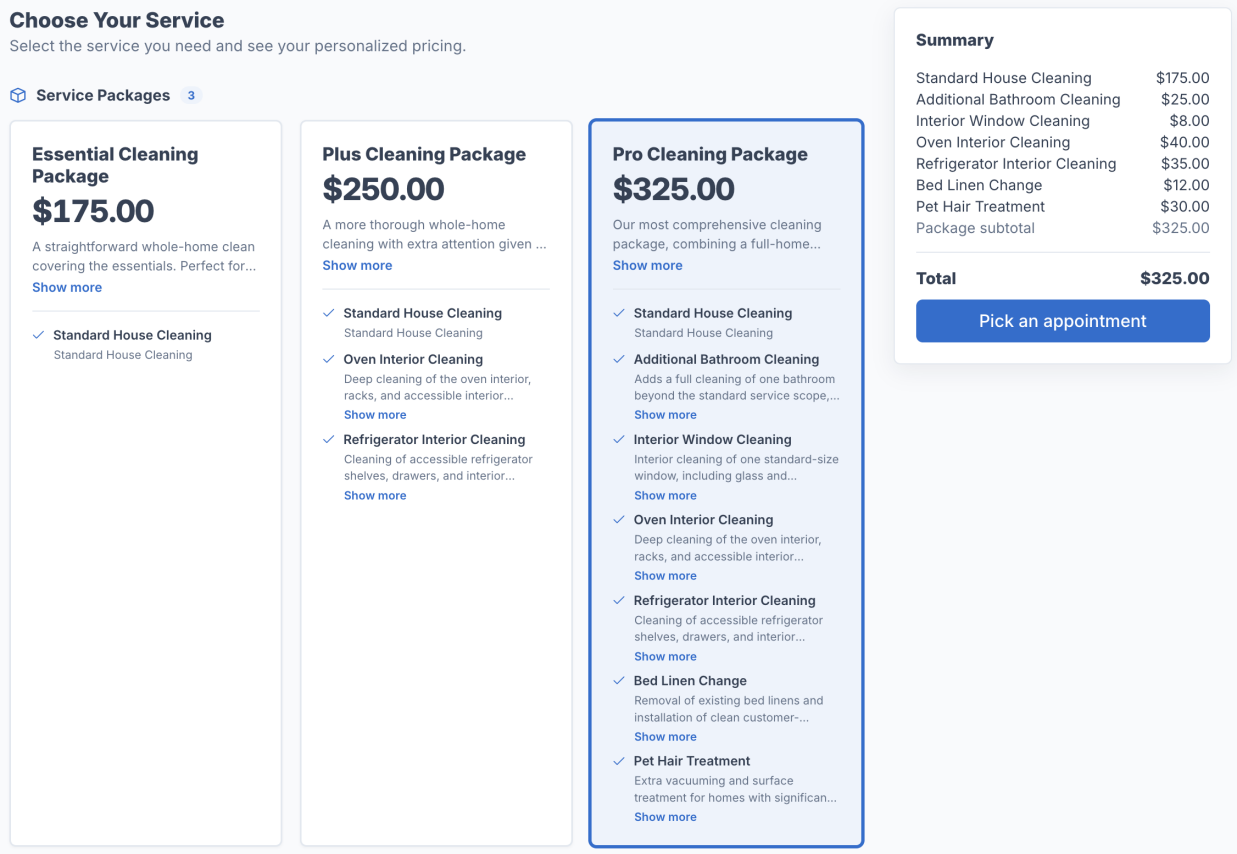
A Good–Better–Best structure gives customers three clearly defined levels of service at different price points.

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.



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.

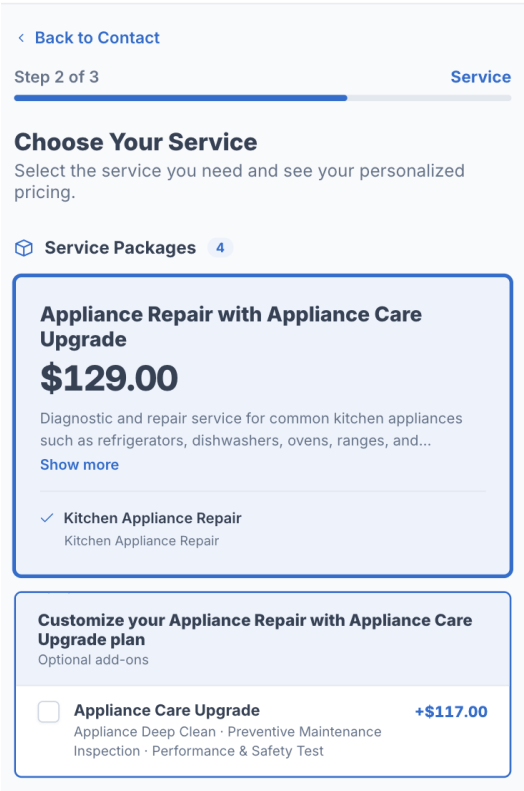
If an item should always be part of the package but you want the customer to see it listed, make it a Required option. It will show under Included.

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.



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.