# Online Scheduler Configuration

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## Overview

The Online Scheduler lets your customers book their own appointments without calling the office. Common services for self-scheduling include estimates, annual maintenance checks, or system inspections.

This article will review:

- Enable the Online Scheduler
- Fine-Tune Your Settings
- Online Scheduler Settings Reference
- Tracking Leads
- Embedding on Your Website
- FAQs

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## Enable the Online Scheduler

**To get started, decide which services, if any, you want to offer for self-scheduling. To enable self-scheduling for a service:**

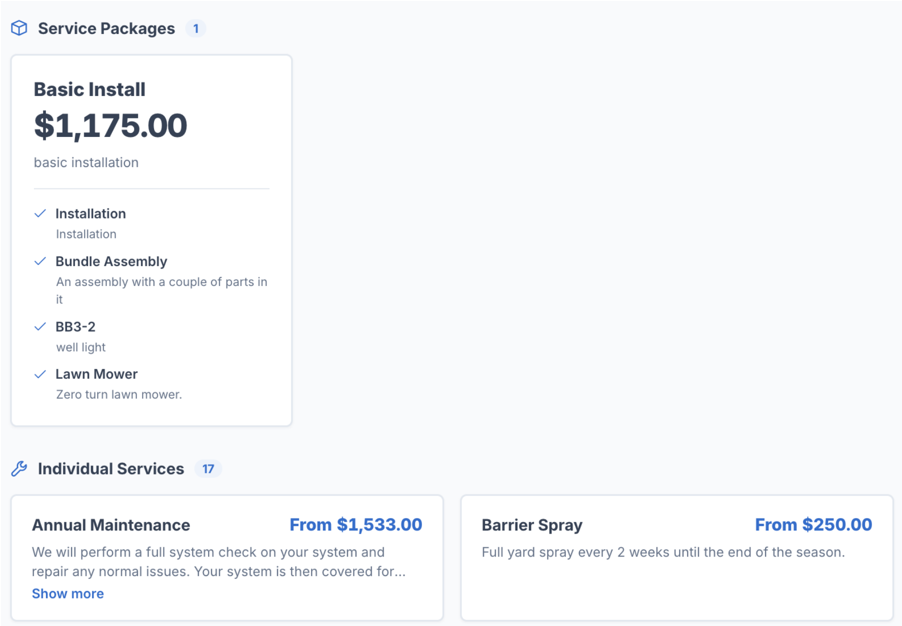
1. Navigate to **Control Panel > Services**.

2. **Edit** the services you want to offer and check the**Enabled** checkbox in the **Self-Service Scheduling** section for each service.

**Optionally, you can also configure and enable Proposal Templates that will be offered as Service Packages.**

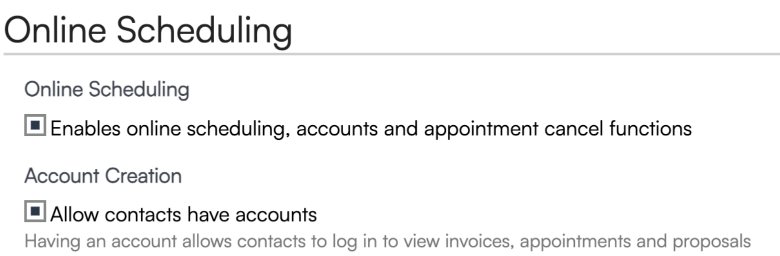
1. Navigate to **Control Panel > Parts > Templates.**

2. Add or edit Proposal Templates that you would like to offer via online scheduling.



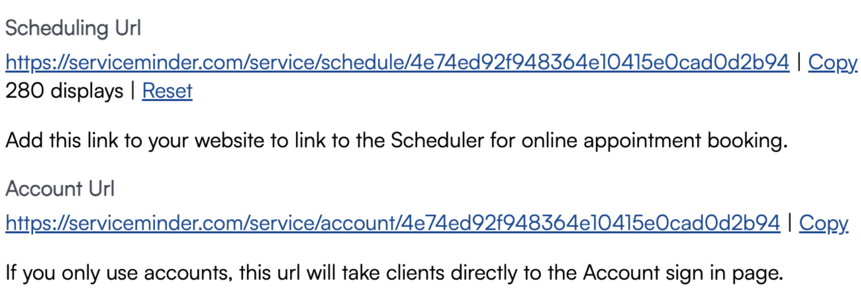

**Next, turn on the scheduler itself:**

1. Go to **Control Panel > Scheduling**.
2. Scroll down to the **Online Scheduling** section.
3. Check the **Online Scheduling** box.




**Finally, make the online scheduler available to your customer base.**

To add the online scheduler link to your website, click**Copy Link** and embed it on your site. Customers clicking the link will be directed to the scheduler to make appointments.




Once enabled, you can preview how the scheduler will look to customers by clicking the link. The top portion of the online scheduler allows users to select from available services.

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# Fine-Tune Your Settings

Once the basics are in place, take a few minutes to review your Online Scheduler settings and tailor the experience to the way your business operates.

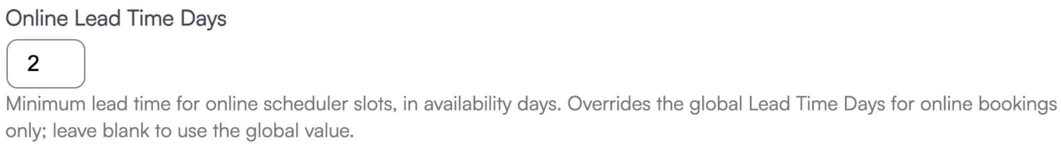
Most of these settings will already be familiar if you've used Online Scheduling before. However, there are a few newer or expanded capabilities worth a closer look.

## Give Online Bookings Their Own Lead Time

**Online Lead Time Days** gives you more control over how soon customers can book through the Online Scheduler without changing how your team schedules internally.

For example, your team might be comfortable scheduling an appointment for tomorrow when speaking directly with a customer, while you'd prefer online bookings to require at least three days' notice.

Set **Online Lead Time Days** to create that additional buffer specifically for scheduler bookings. If you leave it blank, the scheduler will continue using your organization's existing **Lead Time Days** setting.

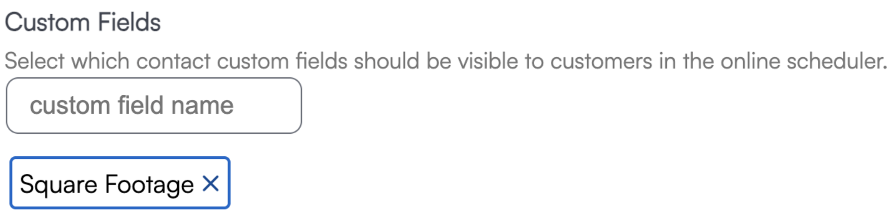



## Collect Better Information with Custom Fields

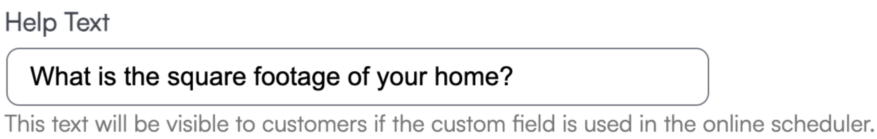
Use **Custom Fields** in the Online Scheduler settings to choose which Contact Custom Fields customers should complete during booking.

This is useful for collecting details such as:

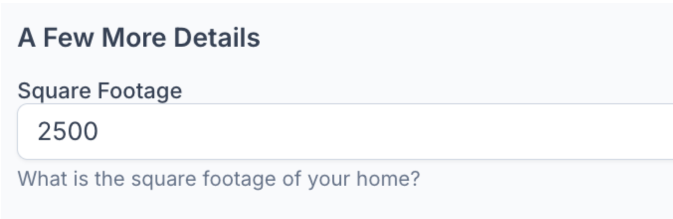
- Square footage
- Acreage
- Number of windows
- Number of rooms
- Property or equipment details




Want to give customers a little more guidance? Help Text is configured on the Custom Field itself under: **Control Panel > Custom Fields**




When a field you've added to the Online Scheduler has**Help Text** configured, that guidance appears directly beneath the field during booking. This is especially helpful when customers may need clarification about what to enter or how to measure it.



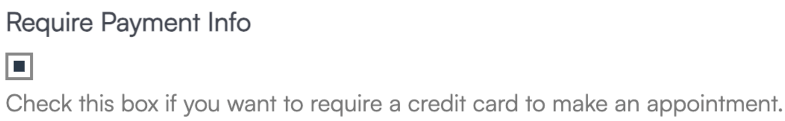

**Try this:** If you're using a Custom Field to calculate pricing, use Help Text to explain exactly what information the customer should provide. Then let the Online Scheduler use that value to calculate their price automatically.

Learn more about Setting Up Dynamic Pricing with the Online Scheduler.

## Collect Payment Information While Customers Book

The Online Scheduler can include payment as part of the booking experience.

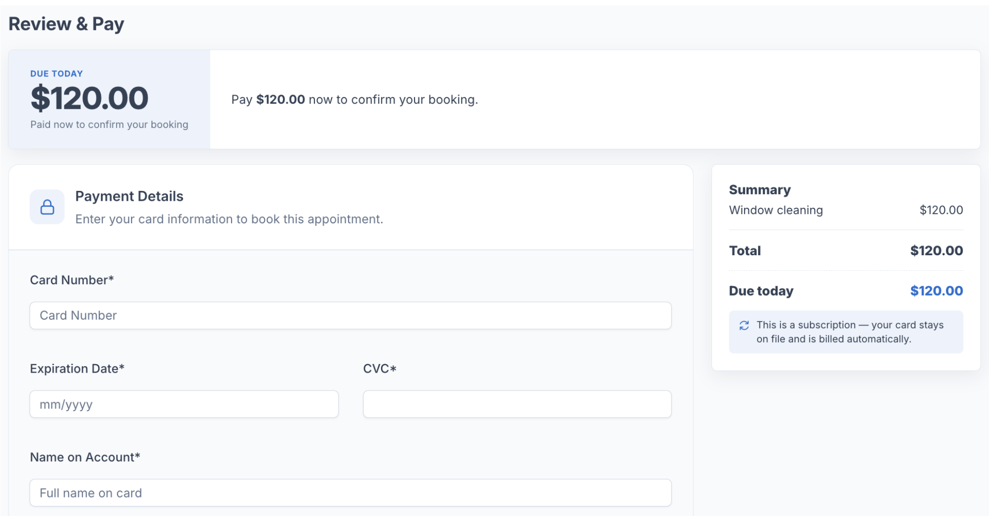
Enable **Require Payment Info** when you want customers to provide payment information before completing their appointment.




Depending on your existing payment and prepayment configuration, you can use the scheduler to support experiences such as:

- Collecting a deposit
- Collecting full payment
- Saving a card on file for later

This lets you move an important part of the transaction into the booking flow rather than following up with the customer afterward.



**Why it matters:** For services where payment or a deposit is expected before the appointment, collecting it during booking can reduce extra administrative work and create a more complete self-service experience.

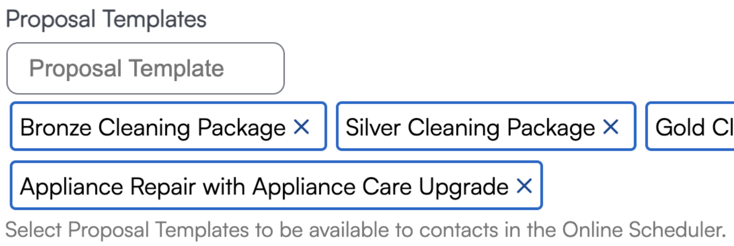
## Turn Proposal Templates into Bookable Packages

**Proposal Templates** have a much bigger role in the updated Online Scheduler.

You can make selected templates available as**Service Packages**, allowing customers to book pre-built combinations of services and parts rather than choosing only a single service.

You can use packages to create:

- Good–Better–Best service tiers
- Bundled services
- Optional upgrades and add-ons




**Take it further:** Proposal Templates and Proposal Options can work together to give customers a starting package and then let them add upgrades while they book.

Learn more about Booking Packages and Add-Ons with Proposal Templates.

# Online Scheduler Settings Reference

The settings above are just a few of the ways you can customize the booking experience. Use the full reference below to review all available Online Scheduler configuration options.

| Setting | Description | Use Case |
|---|---|---|
| **Online Scheduling** | Enables self-service appointment scheduling, customer account creation, and appointment cancellation functionality. | Enable this if you want customers to schedule appointments online. |
| **Account Creation** | Allows contacts to create and log into a Contact Portal account. | Can be enabled without Online Scheduling if you only want contacts to view appointments, invoices, and proposals. |

| Setting | Description | Use Case |
| --- | --- | --- |
| **Scheduling API Key** | Associates an API Key with the Online Scheduler. | Commonly used to track lead sources, campaigns, and marketing performance. See Tracking Leads below. |
| **Scheduling URL** | The URL customers use to access the Online Scheduler. | Add this link to your website, emails, advertisements, or social media. |
| **Account URL** | The URL customers use to access the Contact Portal login page. | Useful if customers need account access but are not scheduling appointments. |
| **Self-Service Radius** | Defines the maximum distance (in miles) a customer can be from your warehouse and still schedule online. | Customers outside the radius will be directed to contact your office instead. |
| **Online Lead Time Days** | Sets a minimum lead time that applies only to appointments booked through the scheduler, separate from your team's regular internal scheduling lead time. Leave it blank to fall back to your existing global Lead Time Days setting. | Useful if you want more buffer on externally booked jobs without changing how your team schedules internally. |
| **Show Team Slots Only** | Displays availability based on Teams rather than individual Service Agents. | Use this if your organization schedules appointments using Teams mode. |
| **Exclude Internally** | Hides self-service services when creating appointments or proposals internally. | Useful for services that should only be offered through the Online Scheduler. |
| **Self-Service Phone** | Displays an alternate phone number on the Online Scheduler. | Allows scheduling inquiries to be routed to a different phone number than your primary office number. |
| **Hide Queued Appointments** | Prevents portal users from seeing queued appointments. | Scheduled appointments remain visible. |
| **Confirmation Redirect URL** | Redirects customers to another webpage after completing the scheduling process. | Commonly used for thank-you pages or additional instructions. |
| **Contact Me Redirect URL** | Redirects customers to a specific webpage when they choose to be contacted instead of scheduling online. | Often used to send customers to a contact form or customer service page. |
| **Custom Fields** | Displays selected Custom Fields during the scheduling process. Configure Help Text on the fields to give your customers guidance when filling out their information. Learn more about custom fields. | Commonly used to collect information such as square footage, acreage, number of windows, or other pricing-related data. |

| Setting | Description | Use Case |
|---|---|---|
| **Require Payment Info** | Requires customers to enter payment information before scheduling. | Stores a payment method on file and can be used alongside deposits or prepayments. |
| **Proposal Templates** | Makes Proposal Templates available as Service Packages. | Allows customers to choose pre-built service packages that include services, parts, and add-ons. |

# Tracking Leads

Tracking which campaigns generate the most revenue is essential for refining your marketing strategy. The online scheduler supports **Channel** and **Campaign** tracking, as well as standard UTM parameters, enabling detailed performance analysis.

Your scheduler URL can include two parameters:**channel** and **campaign**. For example:

**https://serviceminder.io/service/*unique-id*?channel=*channel-id*&campaign=*campaign-id***

Alternatively, the scheduler recognizes standard UTM parameters (`utm_source`, `utm_medium`, `utm_campaign`, and related supported UTM parameters), so leads coming from marketing tools that already tag links with UTMs get attributed correctly without extra setup.

When included in the URL, these parameters help attribute lead sources to specific campaigns, even for contacts who do not schedule an appointment. Every contact created through the online scheduler is also automatically tagged **"Online Scheduler"** in ServiceMinder, making it easy to filter and report on scheduler-originated leads — including prospects who started the flow but didn't complete a booking. You can then use the **Lead Source Revenue Report** to measure the success of various campaigns.

Keep in mind that this tracking tells you where a lead came from, not where in the booking flow someone may have dropped off — the scheduler doesn't report funnel-level metrics like impressions, click-through rate, or step-by-step abandonment.

Learn more about Channels, Campaigns, and Revenue Forecasting.

## How to Track Leads

There are three primary ways to track leads from the online scheduler:

1. **Default Online Scheduling Link:** This will use the settings defined in **Control Panel > General**. Learn more at General Settings.

2. **API Key Link:** This uses the settings from the chosen API key (if present), or defaults to what's set in **General**.

3. **Custom URL:** You can manually append **Channel** and **Campaign** parameters (or standard UTM parameters) to the URL. This is not recommended unless you have a web team handling redirects and tracking.

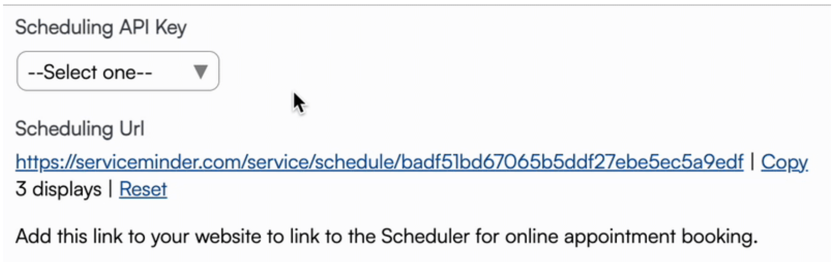
## Using an API Key

The online scheduler allows you to add API keys, which offer several benefits:

- Contacts and appointments created via the scheduler are tagged with the API key for easier tracking.
- You can differentiate performance across different sources by using unique API keys (e.g., one for your website, another for a digital ad campaign).
- API keys automatically apply the specified **Channel** and **Campaign** to new contacts and appointments.

To set up:

1. Create an API key in **Control Panel > API Keys** (learn more in API Key Configuration).
2. Go to **Control Panel > Scheduling**, and in the **Scheduling API Key** dropdown, select your API key.
3. **Copy** the new **Scheduling URL** that populates.




> Important: **Do NOT click Save immediately**. Instead, copy the new URL, which will include the unique API key at the end. This URL can now be used for scheduling links on emails, websites, etc.

The API key allows you to track leads from specific campaigns, helping you measure the effectiveness of different marketing channels. If you're issuing several links for different campaigns (say, a quarterly email push vs. a link embedded on your site), a separate API key per link keeps each one's leads correctly attributed.

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# Embedding on Your Website

Beyond linking out to the scheduler, you can embed it directly on your own site via iframe so customers book without leaving your domain.

- **Iframe embedding:** The scheduler supports being embedded on a third-party website (your brand or franchisee site) via a standard iframe.
- **Attribution passthrough:** Standard UTM parameters (`utm_source`, `utm_medium`, `utm_campaign`, and related supported UTM parameters) carry through an embedded iframe the same way they do for a standalone scheduler link — see Tracking Leads above.

## Limitations

**Google Click ID** (`gclid`) isn't currently supported for attribution via URL or custom field passthrough. If your paid-search reporting depends on `gclid`, factor that gap in until it's supported.

**Large attribution payloads:** If your website already captures a large attribution payload (a full JSON object rather than simple UTM key/value pairs), that can't be passed through standard URL/GET parameters due to size limits. A JavaScript-based iframe initialization pattern (a bootstrapped variable or data attribute) is the intended way to pass richer attribution data — check with your integration or dev team on the current supported approach before building this out.

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# FAQs

**How do I get the online appointment scheduler to show something other than the first available slot?**In **Control Panel > Scheduling**, look for **Open Time Granularity**. If left blank, it defaults to showing the first available slot. Setting it to an hourly or custom interval will allow customers to choose specific timeslots, and this setting will apply across all appointments.

**Can a contact reschedule an appointment via the self-scheduler?** No, contacts cannot reschedule once an appointment is made. They would need to call the office (or a specific scheduling number) to reschedule.

**How will I know if an appointment was scheduled through the online scheduler?** Appointments scheduled through the scheduler will appear immediately on the calendar, and both the customer and the office will receive automated notifications.

**What if I have a large territory and want to limit how far agents travel?** In **Control Panel > Scheduling**, you can set a **territory radius** to limit scheduling. For example, if you set a 30-mile radius, customers outside of that area will be prompted to contact the office directly.

**What are the steps for setting up self-scheduling in my organization?**

1. **Control Panel > Scheduling:** Check the **Online Scheduling** box and get the scheduler URL. You can email this to contacts or add it to your website.

2. **Control Panel > Services:** Edit services to enable **Self Scheduling**.

3. **Control Panel > Service Agents:** Ensure agents are available for scheduling by unchecking **Internal Only** for agents you want to appear in the scheduler.

**Does the modernized scheduler support ACH payments? (New)**Not yet. ACH support for online bookings hasn't shipped — if this is a compliance requirement for your business (for example, offering a no-fee alternative alongside a credit card surcharge), plan around that until it's available.

**Can I turn on the modernized scheduler for one location without switching my whole brand? (New)**Yes. The Online Scheduling toggle can be set at the org level, so you can enable the modernized experience for a single location — a template org, for instance — before rolling it out further.

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