

# Appointments - An Overview

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With Jackrabbit's Appointments feature, you can easily schedule 1:1 lessons, evaluations, room rentals, etc., by offering available time slots based on staff and room availability. This prevents double booking while making the most of your resources. The smart scheduling system simplifies managing private lessons and other offerings, saving you valuable time and effort.

Manage a variety of services all in one platform, simplifying operations and reducing complexity. Optimize resources to maximize space and staff productivity and increase revenue by minimizing downtime.

Keep parents in the loop with timely email notifications, and make it easy for them to add important dates directly to their personal calendars for added convenience.

Permissions determine what data your Users can access and what actions they can perform. The Appointments feature requires the *Appointment Types* and *Appointment Bookings* permissions. These two permissions are automatically granted to Users whose roles are either Owner or Manager/Director. Learn more about [Permissions for Jackrabbit Users](#).

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Select a heading to expand the section and learn more.

## #1 - Create Appointment Types

Appointment Types are created for each type of booking you'll offer, such as private lessons, auditions, volunteer hours, etc.

Four drop-down values are used with Appointments: *Transaction Type (Debit)* and *Category 1, 2, and 3*. Consider adding new values to customize your reporting. Learn more about [Customizing Drop-down Lists](#).

Appointment Types are created in four steps.

Step One - Details and Availability Window

1. Go to the **Appointments** menu > **Appointment Types** and select the **Add Appointment Type** button.
2. In the Details section, add an **Appointment Type Name** (required) and a **Description** (optional). Note: Currently, the *Description* field is visible only to Jackrabbit Users. However, in the future, this visibility will be expanded to include the Parent Portal, allowing parents to view the descriptions as well.
3. The Availability section is where you'll define when appointments of this type will be offered.
  - o Add a **Start Date** (required) and an **End Date** (optional).
  - o By default, *Block this Appointment Type on Closed Dates* is selected. Clear the checkbox to allow appointments of this type to be booked on Closed Dates.
  - o Click to select all days of the week the appointment will be available (required) and define the times the event type will be offered on those days.
    - Use the **Plus** icon to add another time block to any day.
    - Use **Copy to All** to copy the hours from the first day to the remainder of the days.
- 4.

Optionally, associate staff and room availability to ensure those resources are factored in when finding available booking times, alongside selected days and times and a student's schedule.

- o Select the **Associate Staff Availability** link to select the staff you would like to associate with this type of appointment.
  - Use the Search field to quickly locate a staff person when there are many. All active staff will be listed.
  - A No Availability badge will display next to any staff person whose availability has not been entered in their Staff record (Availability tab).

When a staff person is associated with an appointment and no availability is entered, no appointment booking times will display for that appointment when that staff person is selected.

- o Select the **Associate Room Availability** link to choose the rooms you would like to associate with this type of appointment.
  - When a room is associated with an appointment, Jackrabbit ensures that only available times are shown by checking for any scheduled classes or events in that room. It also factors in staff associations and time availability, returning only times when the room, staff, and student are all free.

5. Select **Next: Scheduling & Thresholds** to move on to Step 2.

#### Step Two - Scheduling & Thresholds

1. Define the length of the appointment.
2. Set appointment bookings to start based on their duration or choose a different start time increment. This allows appointments to be scheduled every five, ten, fifteen minutes, or any other interval on the hour.
3. Select **Next: Fees** to move on to step 3.

#### Step Three - Fees

1. Define the **Appointment Fee** if applicable.
2. Select the **Transaction Type** (required when a fee is assigned) to use when the fee is posted.
3. To automatically post the fee, select **Post Appointment Fee** and choose whether to post the fee based on the date the appointment is booked or the actual date of the appointment.
4. Select **Next: Additional Information** to move on to step 4.

#### Step Four - Additional Information

1. In the Additional Information section, select a **Location** (if applicable) and a **Category 1**; both are required fields. Optionally, change the Max Size to a value greater than one (the default) and select a Category 2 and Category 3.
2. By default, email notifications are set to be sent to the *Contacts/Students, Staff/Instructor, and Admin/Organization*. Clear a checkbox to prevent the email notification from being sent to those individuals.
3. Select **Save and Publish** to begin using the Appointment Type, or save it as a draft and come back to complete it later.

The newly created Appointment Type is now listed on the Appointment Types page (from the Appointments menu), where you'll manage the different types of appointments you offer. Badges will display to inform you which Appointment Types are in draft and which are incomplete and missing information.

## #2 - Book Appointments

Once you've created and published your Appointment Types, you are ready to start booking appointments!

Appointments can be booked using the *Book Appointment* button found on the Appointments tab in Family and Student records or on the Appointment Bookings page accessed via the Appointments

menu. This allows for easy scheduling from multiple locations within the system.

1. Go to the Family or Student record or the Appointments Bookings page and select the **Book Appointment** button.
  2. From the drop-down menu, select the **Appointment Type**. If many types are listed, use the **Search** field to quickly locate one.
  3. Select the checkbox next to the students for whom you want to book the appointment and **Save**. Use the **Search** field to quickly find a student.
  4. In the Timeframe section, use the **Previous Day** or **Next Day** arrows, or click the date to select the day you'd like to book the appointment. Only the timeslots that align with both the student schedule and the date will be displayed.
    - If a timeslot that fits the need is available, click to select it.
    - If no suitable timeslot is available, modify the date to search for other appointment availability.
    - When multiple staff or rooms have been associated with the Appointment Type, use the drop-down menus to select a different staff person or room to check for alternate appointment availability in combination with the date selection. Mix and match until you find the perfect fit!
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