WorkM8 Booking Manager

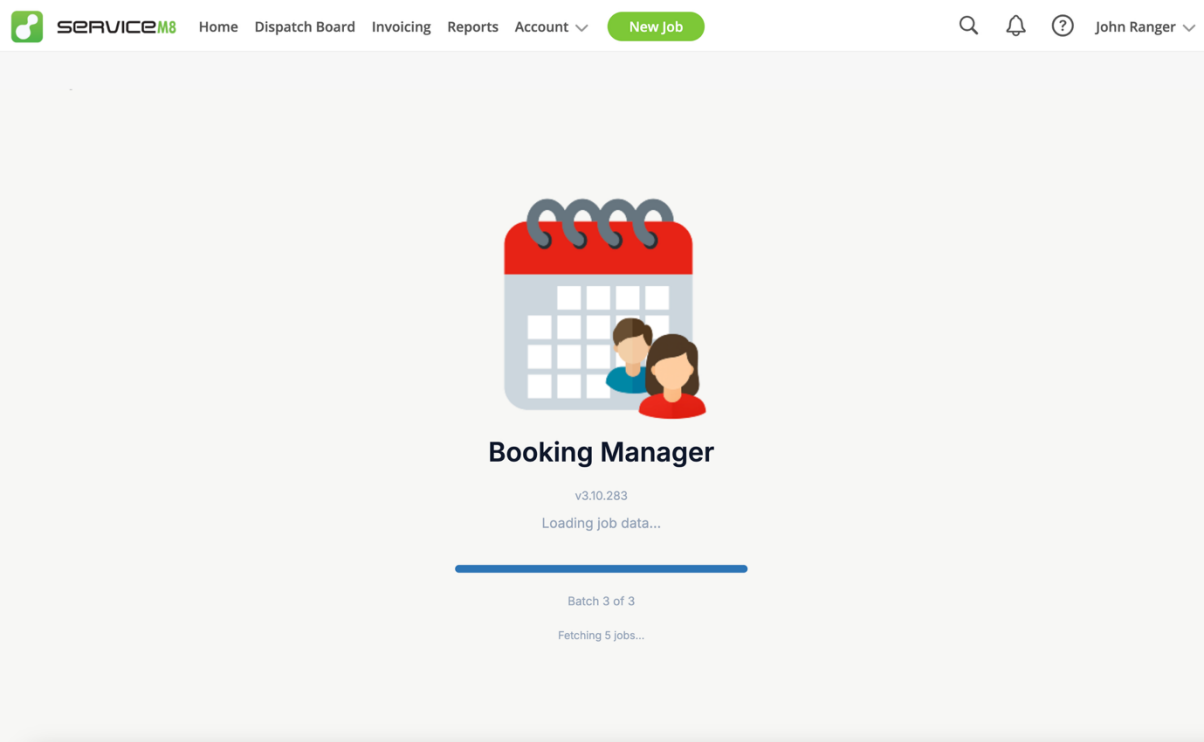
Review Schedules, Resolve Conflicts, Create Bookings, and Configure AI/Staff Settings

Objective

This guide explains how to use the Booking Manager add-on to review daily workload, identify and resolve booking issues, create new bookings, and configure the system so staff availability, attributes, roster rules, and AI features work correctly. It is designed to help an admin or manager quickly understand what needs attention and take the right action.

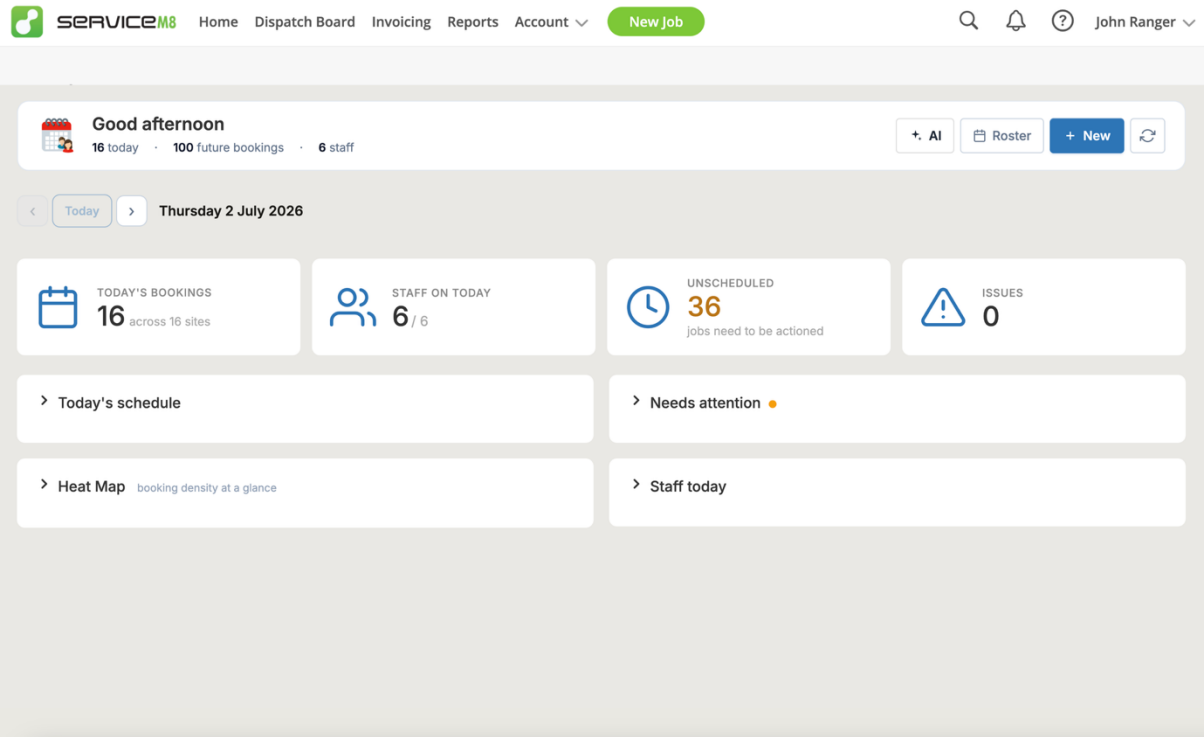
Key Steps

1. Open Booking Manager from the add-ons menu 0:00



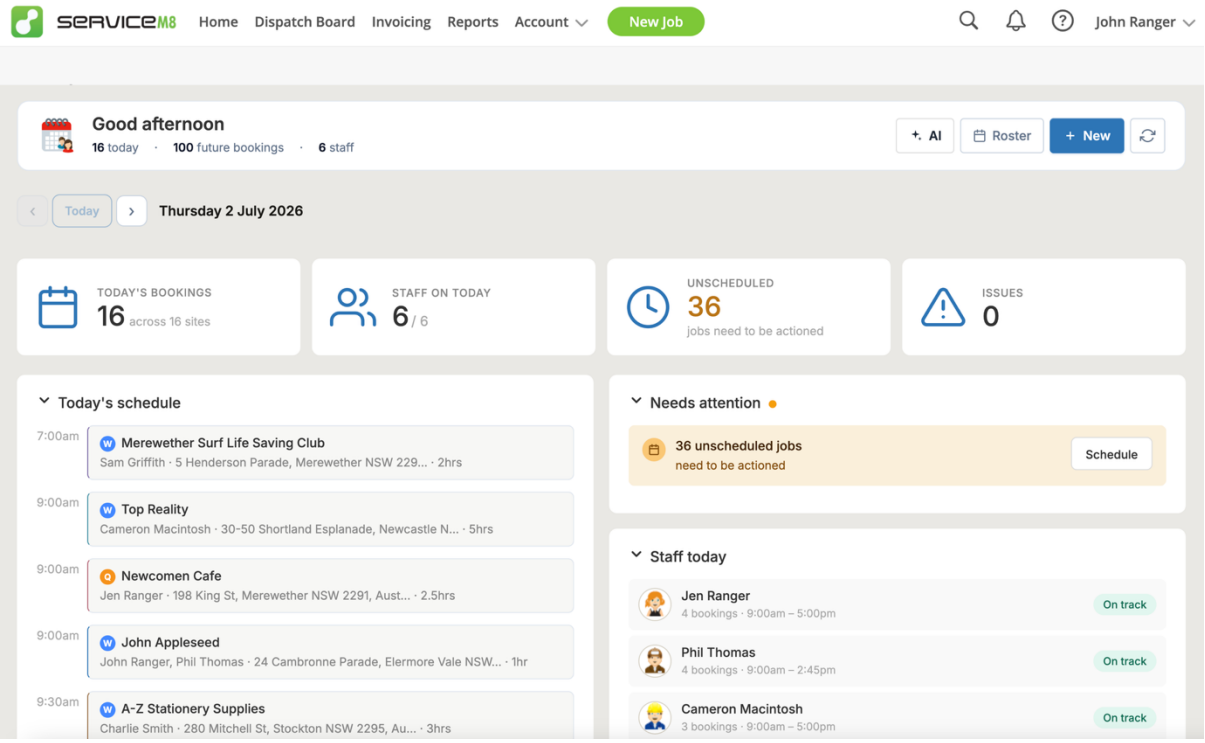
- From the home screen, open the **Add-ons** folder or go to **Account menu > Add-ons**.
- Click the **Booking Manager** icon to launch the add-on.
- Wait for the **Today view** to load.
- If this is the first launch or your system has many jobs, allow extra time for caching.

2. Review the Today view summary 1:08



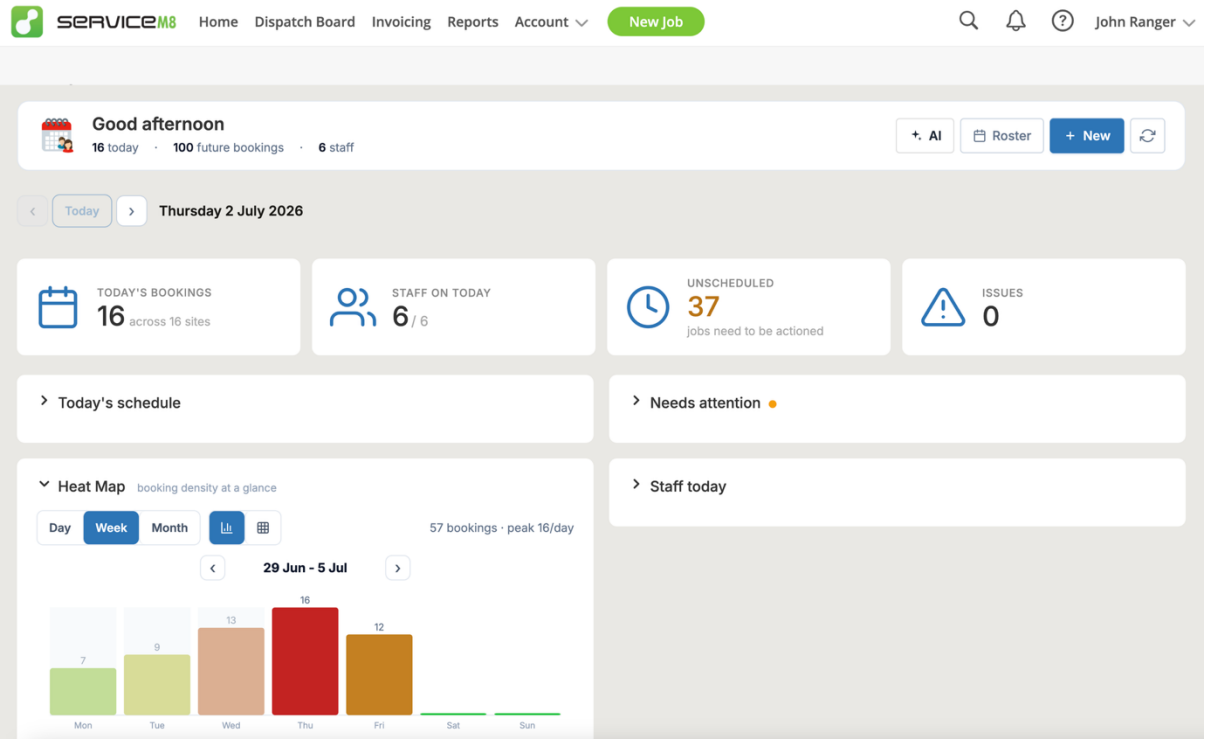
- Use the **Today** screen as the main dashboard for daily scheduling.
- Check the top summary for:
  - total jobs
  - future bookings
  - staff on today
  - unscheduled jobs
  - booking conflicts
- Use this screen to get a quick overview of workload and issues needing attention.

3. Open the main schedule panels 2:09



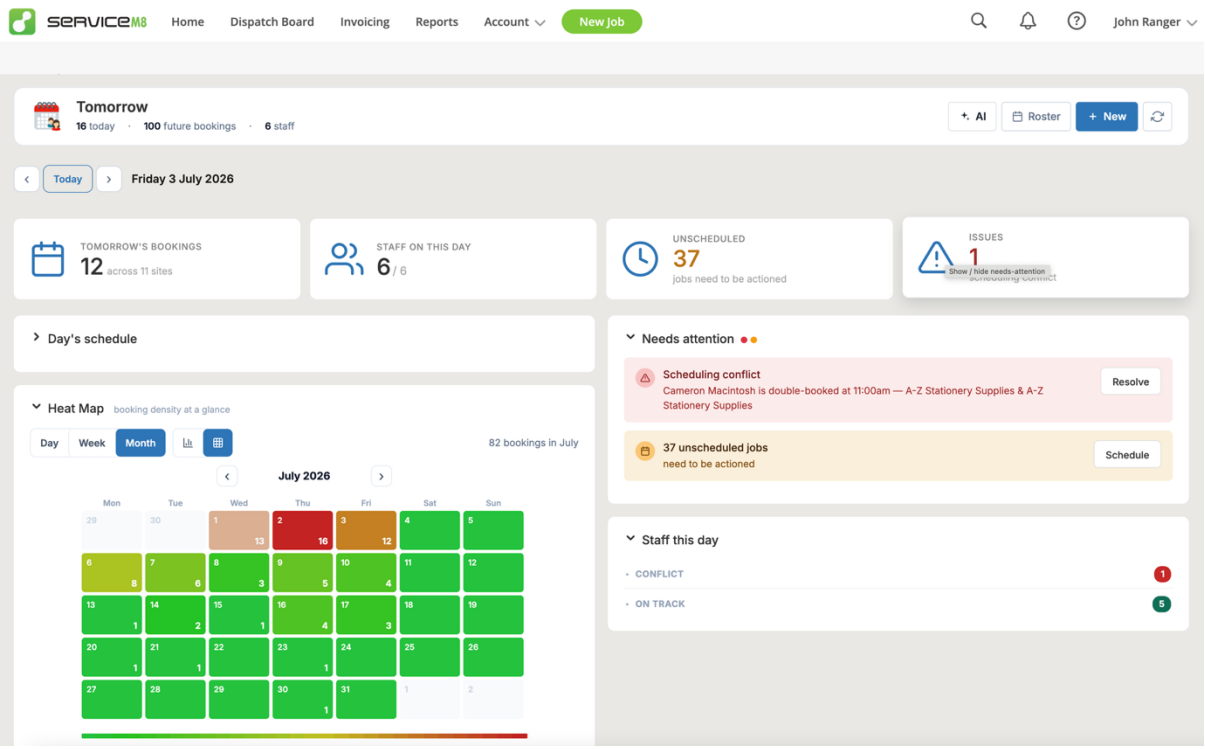
- Click each panel to expand the related section:
  - **Today's bookings** to view all bookings for the day
  - **Staff on today** to see who is working, on leave, or available
  - **Unscheduled** to view jobs that still need booking
  - **Issues** to view booking conflicts or other attention items
- Use the panel indicators to quickly identify what needs action.

4. Use the heat map to assess workload patterns 4:06



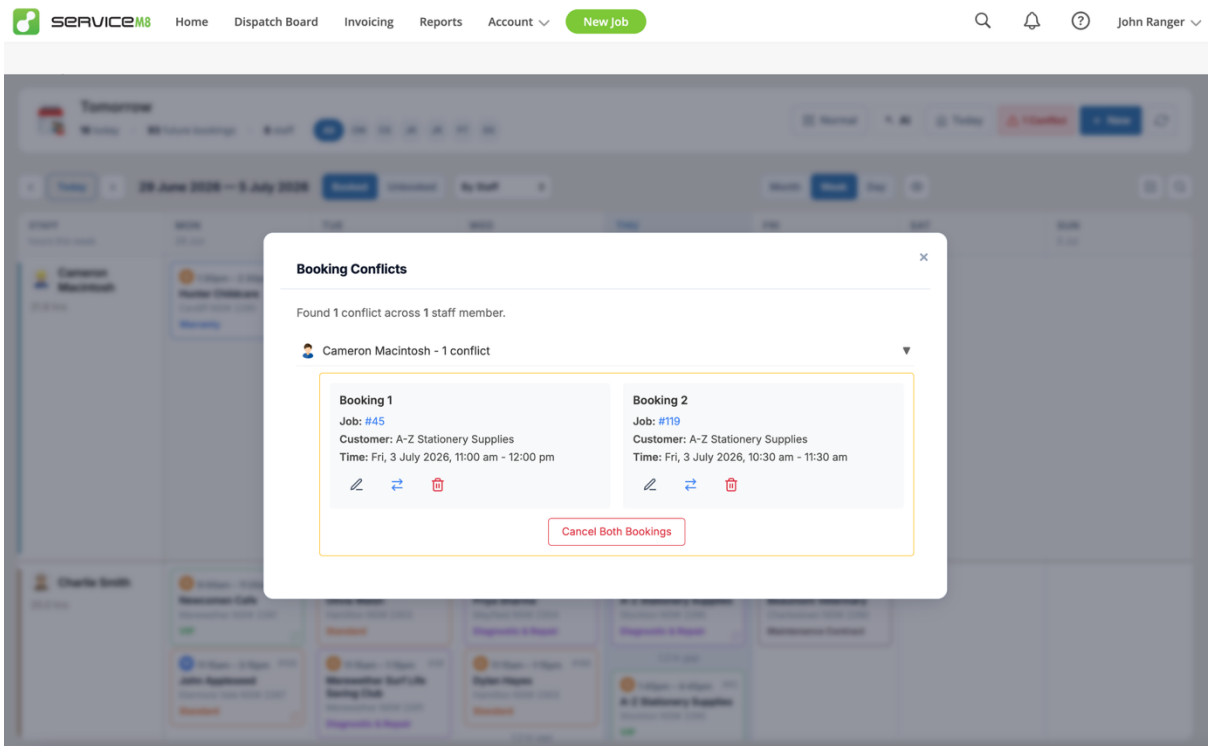
- Review the **heat map** to see how busy the business is by time period.
- Switch between **Day**, **Week**, and **Month** views.
- Use the color intensity to identify busier periods versus quieter periods.
- Switch to **Grid** view in Month mode to see calendar-style job counts by day.

5. Navigate to future dates and review conflicts 6:40



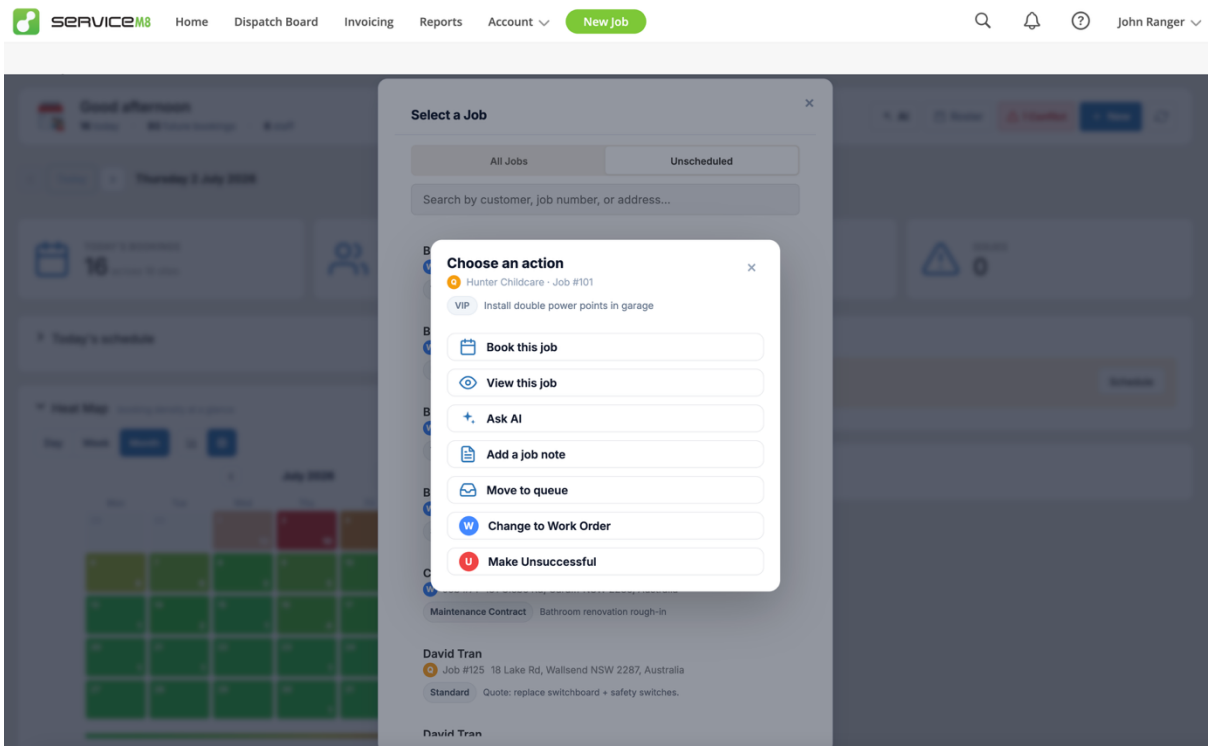
- Click forward through the calendar to review future days.
- Select a day with red conflict indicators to inspect booking issues.
- Open **Issues** to see which staff member is double-booked or triple-booked.
- Review the conflicting jobs and determine the best resolution.

6. Resolve booking conflicts 15:04



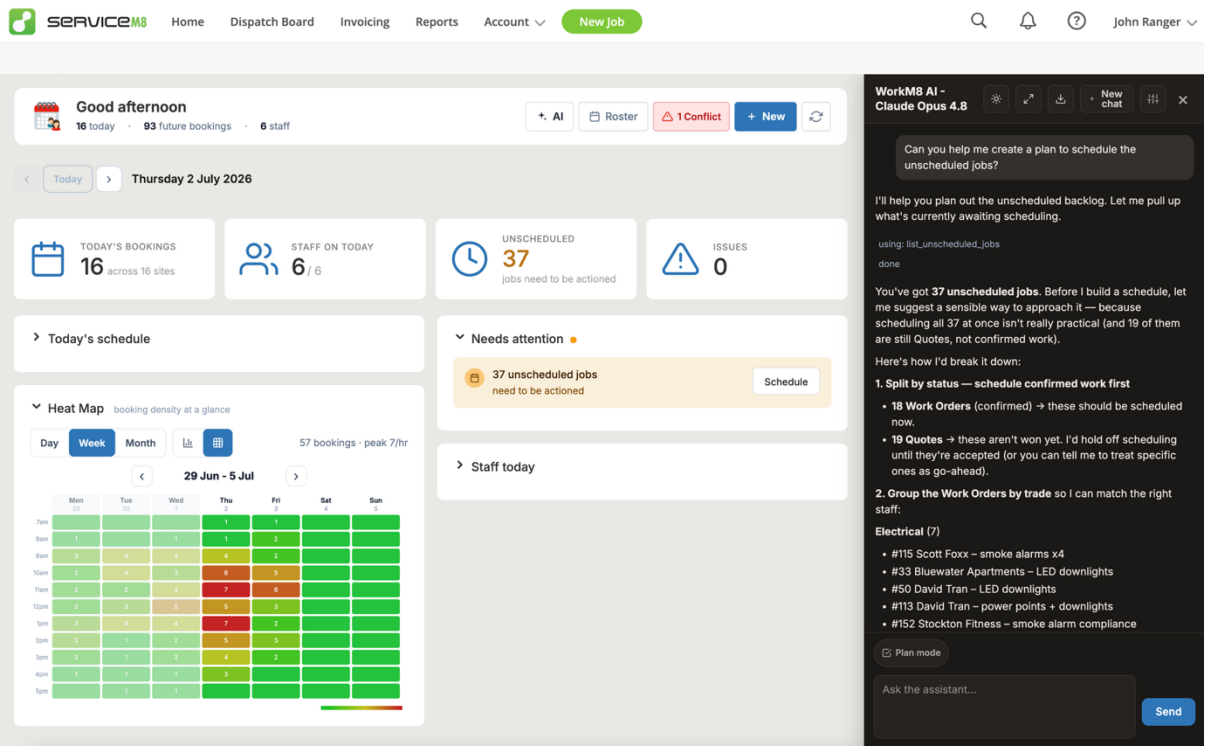
- Open the conflict details by clicking the warning icon or the issue indicator.
- Review the overlapping bookings, including job names, times, and staff member involved.
- Resolve the conflict by choosing one of these actions:
    - **Edit** the booking time/date
    - **Reassign** the booking to another staff member
    - **Cancel** one booking
    - **Cancel both** bookings if needed
- Save the change and confirm the conflict is cleared.

7. Open a job and use the action menu 18:48



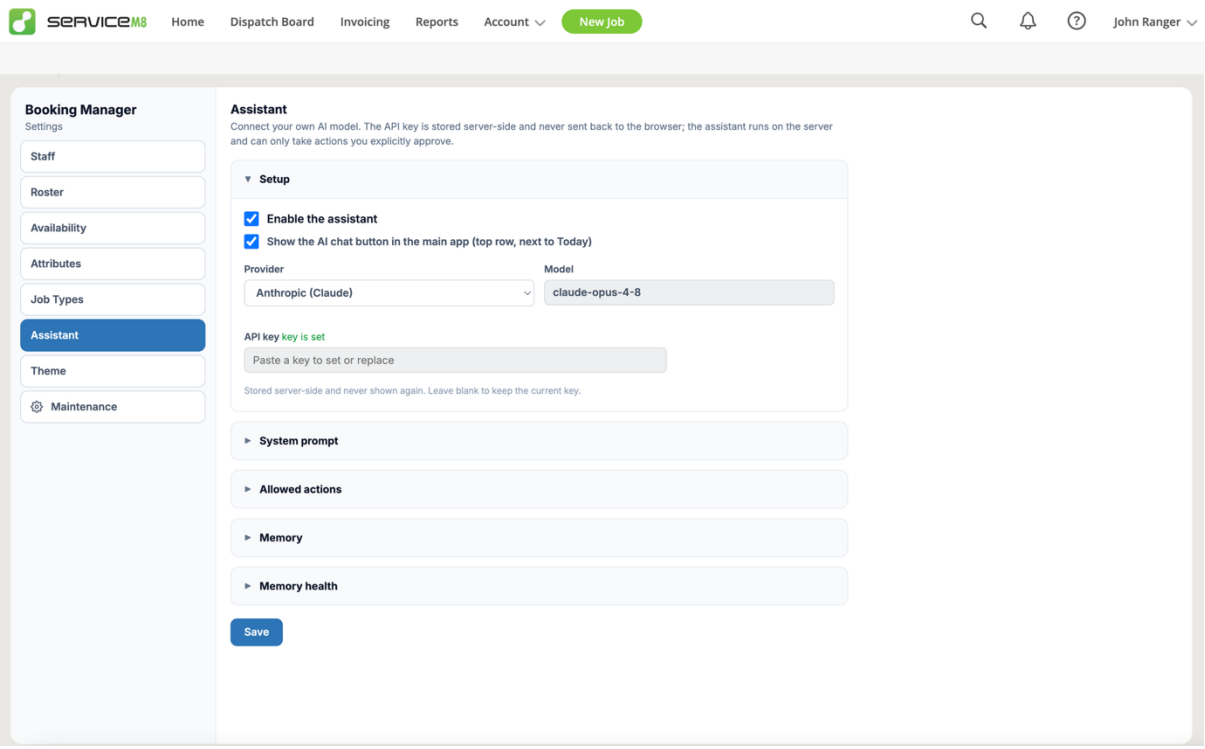
- Click any job to open the **Choose an action** screen.
- Review the job summary, including customer name, job number, category, and description.
- Use the available actions to:
    - modify the booking
    - view the job in the native job card
    - add a job note
    - move the job to a queue
    - change the job status
- Choose the action that matches the workflow requirement.

8. Use the AI assistant for scheduling support 20:31



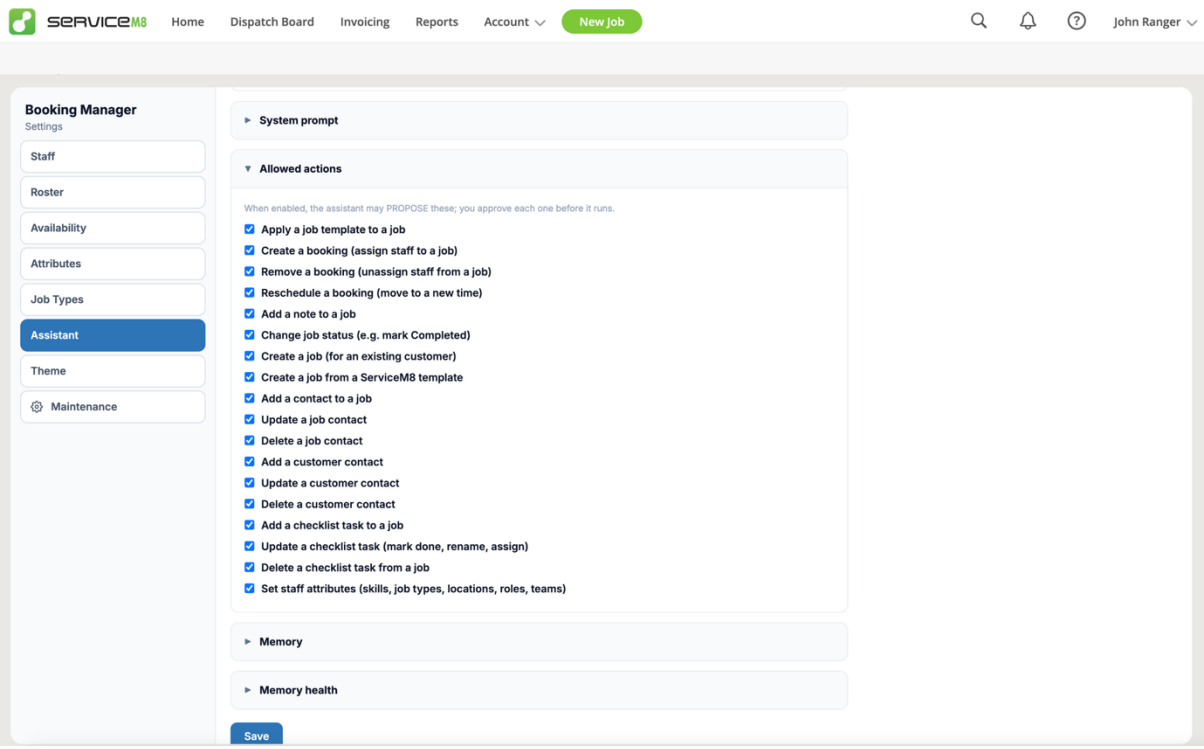
- Open the **AI** panel from Booking Manager.
- Confirm the AI provider and model are configured.
- Use the chat to ask questions such as which jobs need attention or who is available.
- Review AI suggestions carefully before approving any action.
- Save or download chat logs if needed for reference.

9. Configure AI assistant settings 44:14



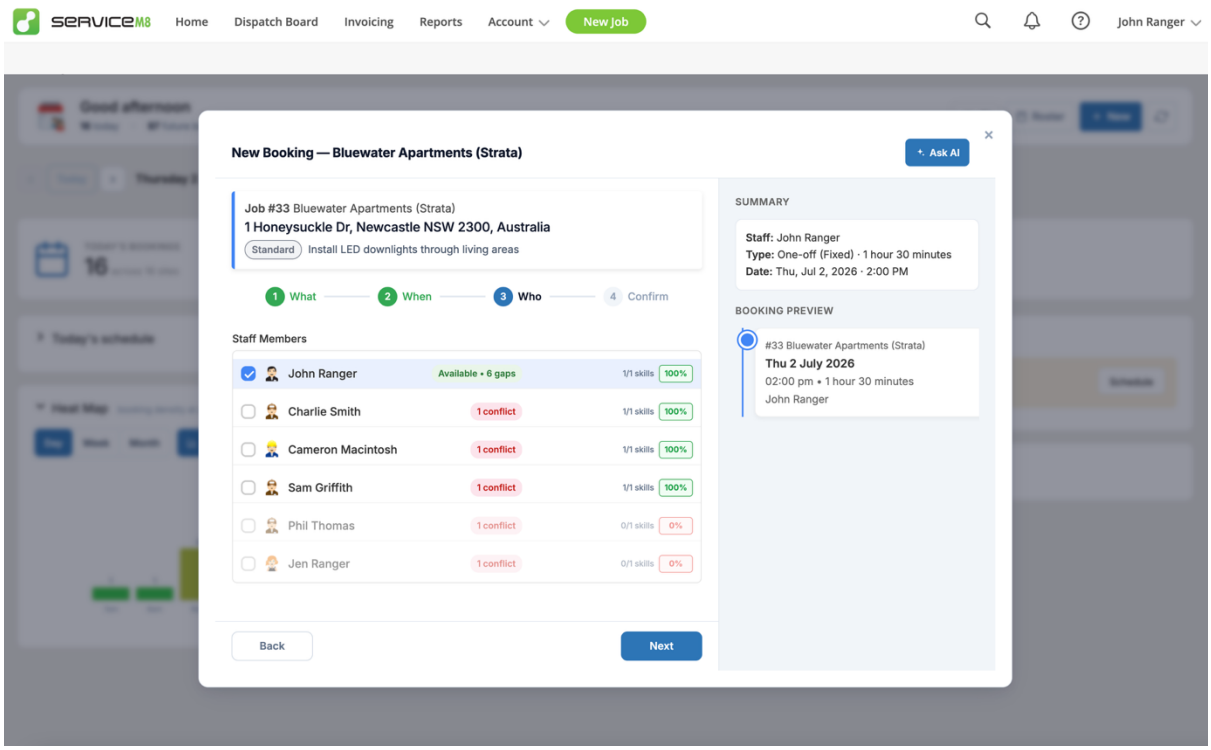
- Go to **Booking Manager Settings > Assistant**.
- Decide whether to **enable or disable** the assistant.
- Select the AI provider:
  - Anthropic
  - OpenAI / OpenAI-compatible
  - OpenRouter
- Enter the correct model name and API key.
- Save the settings before using AI features.

10. Enable or restrict AI tools and memory 47:21



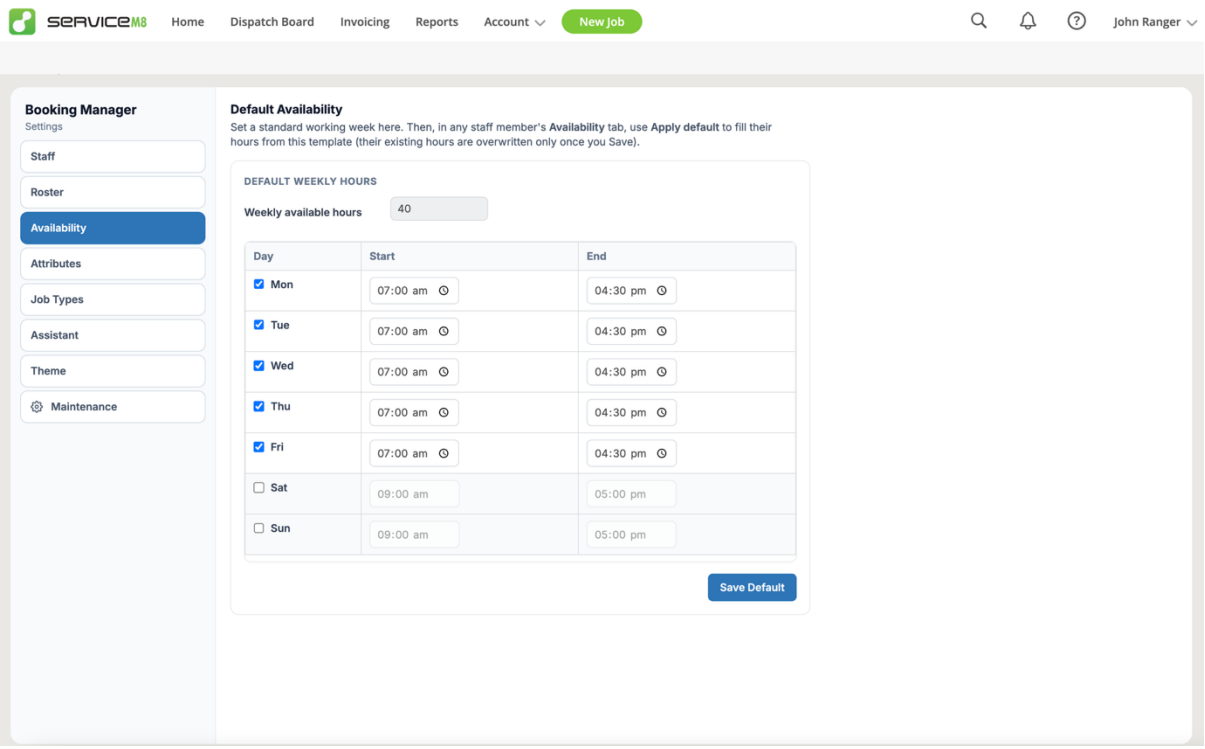
- Review the available AI **tools** and enable only the actions you want AI to perform.
- Keep higher-risk actions disabled unless your team is comfortable with automation.
- Use **memory** only for useful recurring facts.
- Add a clear **system prompt** to teach the AI your business rules, preferences, and scheduling logic.

11. Create a booking from the Booking Manager wizard 30:04



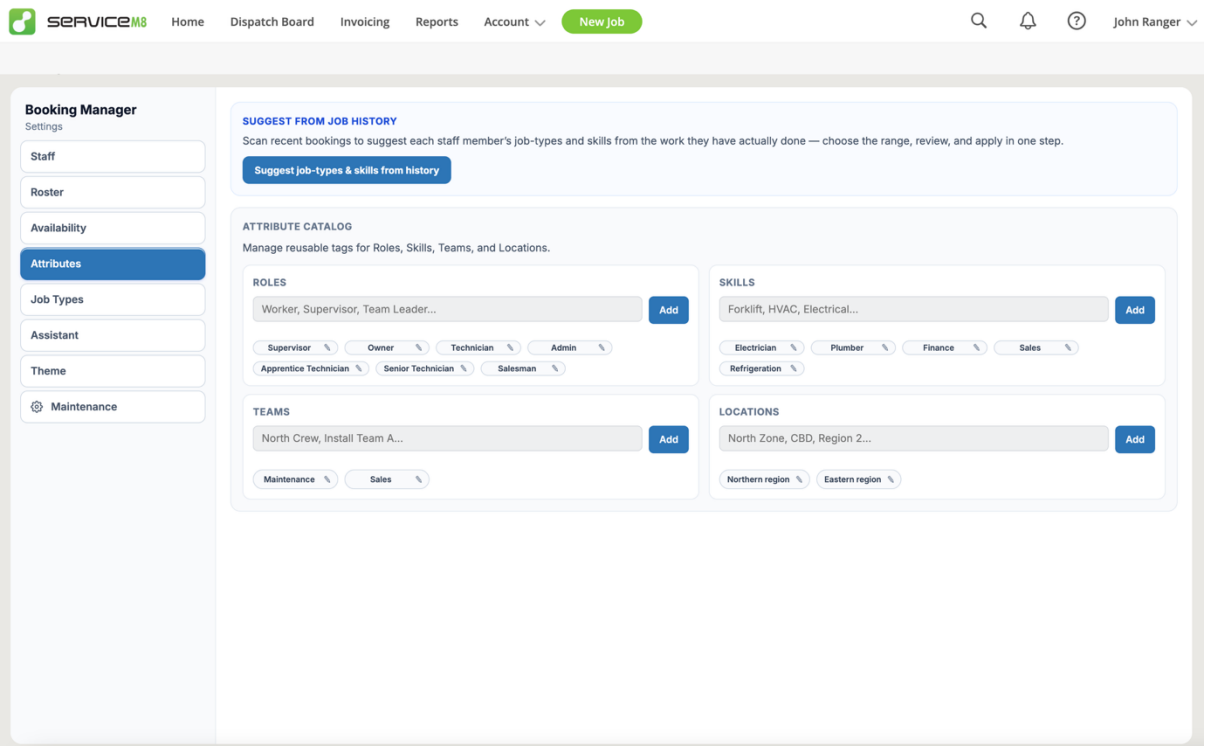
- Open the **Booking Wizard** from an unscheduled job or job card.
- Confirm the job details and status color.
- Choose the booking type:
  - one-off
  - recurring
- Set the duration and job requirements such as role, skill, team, or location.
- Select the date and time using fixed or allocated time.
- Review available staff and choose the best match.
- Confirm there are no conflicts, then create the booking.

12. Set up business availability and staff hours 36:25



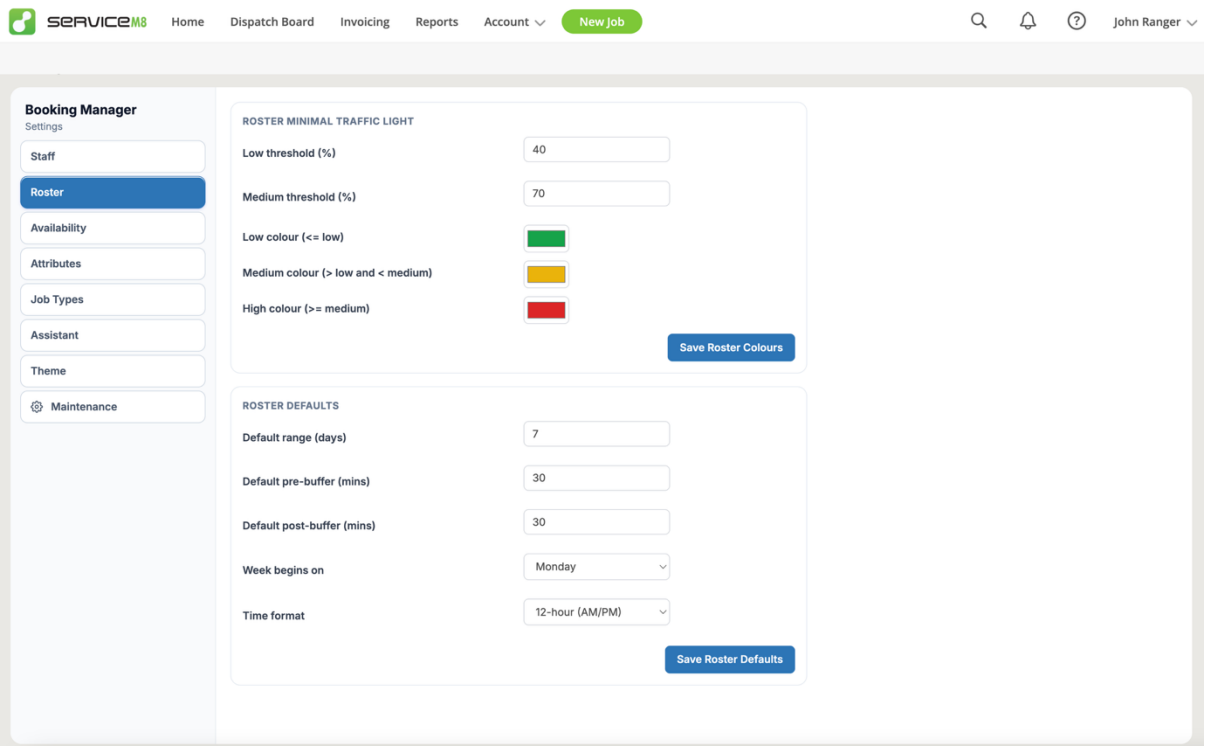
- In **Settings**, open **Availability** first.
- Set the business default working hours.
- Define weekly available hours for staff.
- Apply the default hours to staff or override them for individual staff members.
- Save changes after updating any staff-specific schedule.

13. Configure staff attributes, teams, and locations 39:46



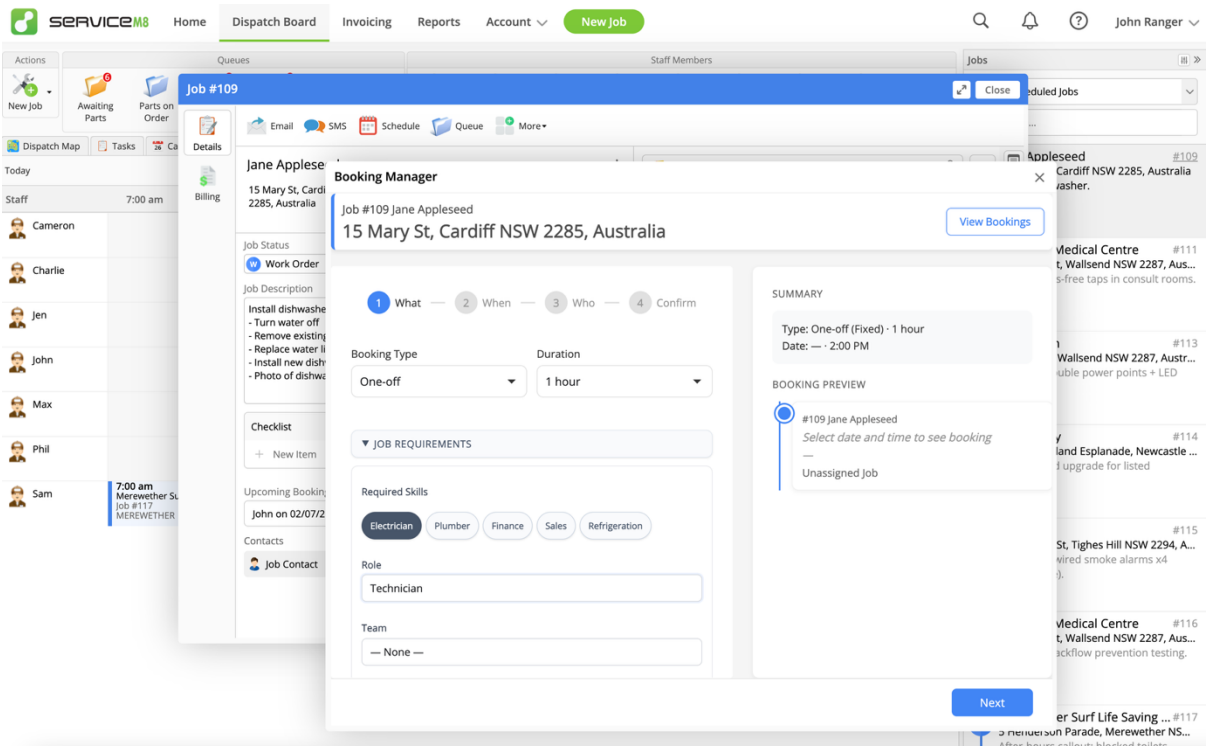
- In **Settings**, create business-level attributes first.
- Set up roles such as owner, supervisor, technician, or admin.
- Create skills such as electrician, plumber, or refrigeration technician.
- Create teams if needed, such as maintenance or sales.
- Add location tags if your business uses regional grouping.
- Return to each staff profile and assign the correct attributes.

14. Adjust roster settings and workload thresholds 42:35



- Open **Roster** settings to define workload rules.
- Set the thresholds for:
  - green = low workload
  - yellow = medium workload
  - red = high workload
- Configure buffer time between bookings if needed.
- Set the first day of the week and time format.
- Save the roster defaults after making changes.

15. Use the Booking Wizard from a job card 51:57



- From the native job card, click **More** and open **Booking Manager / Booking Wizard**.
- Review the job details and requirements.
- Choose the booking date, time, and duration.
- Select the best available staff member.
- Create the booking and confirm the job appears in the schedule.

Cautionary Notes

- **First launch may be slow** if the system has many jobs because Booking Manager caches data locally.
- **AI is experimental** and may produce inconsistent results; always review before approving actions.
- **Conflict resolution should be verified** after edits, reassignments, or cancellations.
- **Do not enable AI tools casually**; some actions can modify bookings automatically.
- **Model names and provider settings must be exact** or AI setup may fail.
- **Availability, roles, skills, teams, and locations must be configured first** before the booking wizard can match staff accurately.
- **Saving is required** after changing settings, staff hours, or roster defaults.

Tips for Efficiency

- Use the **Today view** first each morning to identify urgent issues quickly.
- Use the **heat map** to spot quiet periods and plan future bookings more efficiently.
- Use **compact or minimal roster views** when you need a faster high-level capacity check.
- Keep **staff attributes** standardized so the booking wizard can match people more accurately.
- Add a concise **system prompt** for AI so it follows your business rules consistently.
- Use **queues** to hand off jobs to the right team member when scheduling is not immediate.
- Save time by using the **job card booking wizard** directly when working from an individual job.

Link to Loom

https://loom.com/share/3838035d7419446baca4e127ca45f64c