## Categorized items in Master pages [Legacy]

You can use categories to organize Event types and Booking pages into intuitive and functional groups. If Event type categories or Booking page categories are visible to Customers, they will show up on your Master page as a separate step. Categories in Master pages help Customers to better understand the options available to them, ensuring that they make the correct selection.

## Scheduling flow of Master pages with categorized Booking pages

#### Click this link for an interactive demo

- 1. **Category selection:** Customers are presented with a list of Booking page categories to choose from.
  - By default, the selection instruction is "Select a category." You can edit the instruction based on what your categories represent.
  - In the example shown below, categories are used to model different product types offered by the Financial services company. The selection instructions are "Select your product interest."

chedule9nce		Help
<b>FS</b> west	Select your product interest	
Financial Software West Show	Set up a meeting with a member of our accounting products team.	$\mathbf{O}$
Welcome to the Financial Software West Show. Please follow the instructions to schedule a meeting with your	Budgeting Products Set up a meeting with a member of our budgeting products team.	D
account manager. Thank you, Jeff Rudy, VP Sales, Financial Software Inc.	Forecasting Products           Set up a meeting with a member of our forecasting products team.	٥
This is a demo. Give it a try - No one will call you.	API Products Set up a meeting with a member of our API development team.	•
650.206.5585		
Contact@scheduleonce.com		
www.scheduleonce.com		
(f) 🕑		

Figure 1: Category selection step

2. **Booking page selection:** Once the Customer has selected a category, they'll be presented with a list of all Booking pages in the selected category. In this example, the Customer sees Booking pages for Team members that specialize in the chosen product category.

# **SinceHub** Help Article

## **Schedule Once**

FC	Who would you like to meet with? Change sele	ction 🗸		
west	Tags:     All     Account manager     Product manager     Sales manager			
inancial Software West how	Doug Kane           Senior Account Manager           I look forward to meeting you at the show. Please follow the instructions to schedule			
velcome to the Financial oftware West Show. Please ollow the instructions to	<ul> <li>time with me - It's fast and easy.</li> <li>(f) (initial content of the second seco</li></ul>			
chedule a meeting with your ccount manager.	Geri Maxwell Product Manager			
hank you, £ff Rudy, VP Sales, Financial oftware Inc.	I look forward to meeting you at the show. Please follow the instructions to schedule time with me - It's fast and easy.	⋗		
his is a demo. Give it a try - No				
ne will call you.	Karl Papachristoforou Sales Rep			
650.206.5585	I look forward to meeting you at the show. Please follow the instructions to schedule time with me - It's fast and easy.	♦		
☐ contact@scheduleonce.com ☐ www.scheduleonce.com	$\textcircled{\textbf{f}}$			

Figure 2: Booking page selection step

#### (i) Note:

Booking pages that are not within a category will also be displayed in this step, regardless of which category the Customer selected.

- 3. **Event type selection:** Next, the Customer will choose an Event type.
- 4. Finally, the Customer will pick a date and time for the meeting and fill out and submit the Booking form.

The category name will always appear in User notifications. The category name will only appear in Customer notifications if the Customer went through a category selection step during their booking process.

## Scheduling flow of Master pages with categorized Event types

#### Click this link for an interactive demo

- 1. Category selection: Customers are presented with a list of Event type categories.
  - By default, the selection instruction is "Select a category." You can edit the instructions based on what your categories represent.
  - In the example shown below, categories are used for different languages that are taught at the school. The selection instructions are "Select a language."

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# **SinceHub** Help Article

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	Select a language		0//
Language Global Learn your language online	English		0
Welcome to Language Global! Select your language and try out a free lesson or book a session package.	Spanish		0
A teacher will call you call you at the scheduled time. Thank you.	French		0
This is a demo. Give it a try - No one will call you.	Chinese		0
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Contact@scheduleonce.com			
www.scheduleonce.com			
<b>f 9</b>			

Figure 3: Category selection step

2. **Event type selection:** Once the Customer has selected a category, they'll be presented with a list of all the Event types in the selected category. In this example, the Customer sees all courses offered in the selected language.

Schedule9nce		Help
	Select a course	Change selection ~
Language Global Learn your language online	Free introductory lesson Duration: 30 min Learn about our unique language-acquisition methods.	•
Welcome to Language Globall Select your language and try out a free lesson or book a session package.	Basic language course in 3 sessions Duration: 60 min Learn basic reading and pronunciation skills, as well as common phrases.	Price 200.00 USD for 3 sessions
A teacher will call you call you at the scheduled time. Thank you.	Premium language course in 5 sessions Duration: 60 min Learn all the basic skills, as well as grammar and vocabulary.	Price 300.00 USD for 5 sessions
This is a demo. Give it a try - No one will call you.		
☐ 650.206.5585		
www.scheduleonce.com		
N N Z		

Figure 4: Event type selection step

## i Note:

Event types that are not within a category will also be displayed in this step, regardless of which category the Customer selected.

3. Once the Customer has selected an Event type, they'll continue the scheduling process. In this example, the Customer picks a tutor, selects a time, and fills out the Booking form.

The Category will always appear in User notifications. The category will only appear in Customer notifications if the Customer went through a Category selection step during their booking process.

## Scheduling flow of Master pages with categorized Booking pages and Event types

Master pages with categorized Event types and Booking pages will have two separate category selection steps: one for Booking page categories and one for Event type categories. The order in which the category selection steps is displayed depends on the Master page scenario.

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Let's take a look at an example where the chosen scenario is **Event types first**.

- 1. **Event type category selection:** First, the Customer is presented with a list of Event type categories. After they select an Event type category, they'll be presented with a list of all the Event types in that category.
- 2. Event type selection: The Customer selects an Event type in that category.

## i Note:

Event types that are not within a category will also be displayed in this step, regardless of which category the Customer selected.

- 3. **Booking page category selection:** After selecting an Event type, the Customer is presented with a list of Booking page categories. After they select a Booking page category, they'll be presented with a list of all the Booking pages in that category.
- 4. **Booking page selection:** The Customer selects a Booking page in that category.

#### (i) Note:

Booking pages that are not within a category will also be displayed in this step, regardless of which category the Customer selected.

5. Finally, they'll select a date and time, and fill out a Booking form.