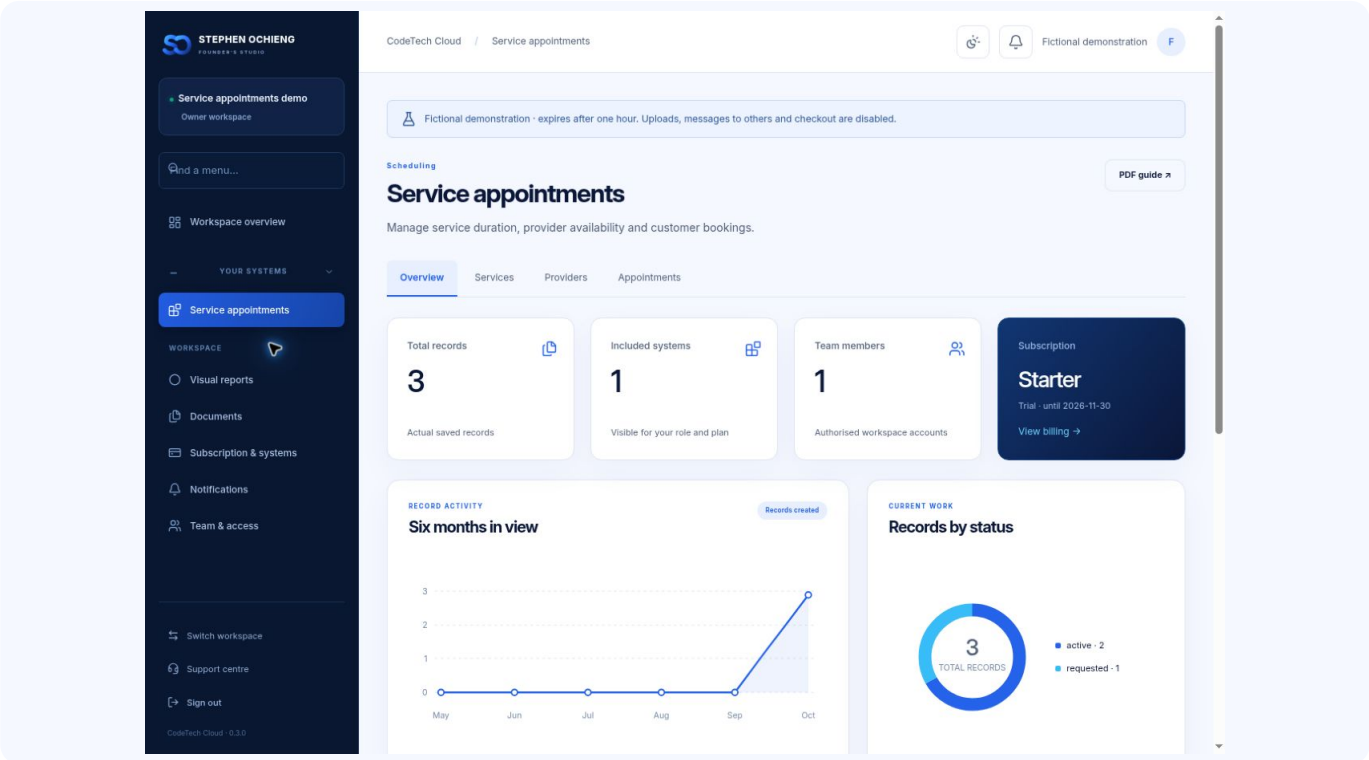
Service appointments

Scheduling / Orientation and scope

Manage service duration, provider availability and customer bookings.

THE CORE WORKFLOW

Create services and providers, request an appointment, confirm availability and record completion or cancellation.



Fictional-data interface capture supplied by the training project. Screen content is illustrative, not live customer activity.

Start with the right workspace

Use a role that permits the intended action. Viewers cannot write. Select the correct organisation, confirm this system is included in its subscription and use test records for your first run. The guide describes the listed core records; advanced sector requirements are evaluated separately.

Prepare the records

Data workbook / Exact fields and input meaning

Services

Field	Type	Entry guidance
Service name	Text	Plain text, up to 200 characters.
Service code	Text	Unique within the workspace; up to 200 characters.
Duration in minutes	Integer	Whole number; check this record's range.
Service price	Money	Non-negative; up to two decimal places.

Providers

Field	Type	Entry guidance
Provider name	Text	Plain text, up to 200 characters.
Work email	Email	A valid email address.
Phone	Text	Plain text, up to 200 characters.

Prepare the records

Data workbook / Continued

Appointments

Field	Type	Entry guidance
Service	Reference	Choose from services in this workspace.
Provider	Reference	Choose from providers in this workspace.
Customer name	Text	Plain text, up to 200 characters.
Customer email	Email	A valid email address.
Start time	Date and time	Date and time. End follows start when paired.
Calculated end time	Computed date/time	Calculated by the server; not an entry field.
Service amount	Computed amount	Calculated by the server; not an entry field.

Each record also carries a workspace, stored state, version and timestamps. Those controls are separate from the business fields above.

Apply a valid action

Actions and safeguards / Run the core process

Record	Possible states	Action and result
Services	active	No configured state action.
Providers	active	No configured state action.
Appointments	requested, confirmed, completed, cancelled, no show	Confirm: requested -> confirmed (manager) Complete: confirmed -> completed (manager) Cancel: requested, confirmed -> cancelled No show: confirmed -> no show (manager)

Core checks to review

- The configured booking derives its end time from the selected service duration and its amount from the service record.
- Confirm, complete and no-show are manager actions. Confirm evaluates the selected provider's availability for the slot.

Use the saved state

The first configured state for appointments is "requested". Use the permitted action for the current state and version. A repeated or stale action is rejected. Processed records cannot be edited as if they were still drafts.

> **APPROVAL IS A ROLE CHECK**
>
> Actions marked "manager" require an owner or manager. The module also declares manager checks for complete, confirm, no show. An action label is not proof of external payment or approval outside the application.

Check the result

Validation and interpretation / Your first controlled run

1

Prepare the context

Create or choose Services, Providers. Confirm that every reference belongs to the selected workspace.

2

Save appointments

Enter the required fields from the workbook. Inspect the stored record and any server-calculated values before proceeding.

3

Apply and inspect

Use confirm only from an allowed state. Reload the record and verify its new state and any related stock, capacity or budget effect described in this guide.

4

Try the protective check

Try confirming overlapping slots for the same provider and verify the availability guard in the accepted build.

Read the records in context

- Read service, provider, customer, calculated end time and booking state together. Requested is not confirmed.
- A service amount is not a verified customer payment. A no-show state records an outcome; it does not create a cancellation fee automatically.

> **EVALUATE THE ADVANCED REQUIREMENTS**
>
> Recurring calendars, reminders, online checkout and external provider scheduling need separate evaluation.

For a support request, include the workspace, system, record reference, action, expected result and observed result. Remove passwords, payment secrets and unnecessary personal data.