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# The Simple Booking Setup Guide

A step-by-step checklist for online booking, without the tech overwhelm.

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Online booking frees you from back-and-forth messages and lets clients say yes the moment they feel ready. You do not need to be technical to set it up well.

Follow these steps in order. Most practitioners finish in an afternoon.

## Step 1: Choose your tool

*Pick one that fits how you work today. You can always change later.*

- [ ] Look for: online payments, automatic reminders, intake forms, and calendar sync
- [ ] Popular options include Calendly, Acuity Scheduling, Square Appointments, Google Calendar booking pages, and practice tools like Jane or Practice Better
- [ ] Start with a free plan or trial before committing
- [ ] Check that it works well on phones, since most clients will book from one

## Step 2: Set your availability

*Protect your energy first.*

- [ ] Enter only the hours you truly want to work
- [ ] Add buffers between sessions (15 to 30 minutes) to reset
- [ ] Set a minimum notice period, such as 24 hours
- [ ] Limit how far ahead clients can book, such as 60 days
- [ ] Block personal days, holidays, and rest days in advance

## Step 3: Add your services

*Make each one easy to understand.*

- [ ] Use clear names: "60-minute Reiki session (in person)"
- [ ] Add a short, warm description of what to expect
- [ ] Set the length, price, and location or video link
- [ ] Mark first-visit services separately if they include extra time for intake

## Step 4: Connect payments and forms

*Gather what you need before the client arrives.*

- [ ] Connect your payment processor and run a small test payment
- [ ] Decide whether to take full payment, a deposit, or payment at the session
- [ ] Attach your intake and consent forms so clients complete them when booking
- [ ] Add your cancellation policy where clients must see it before confirming

## Step 5: Write your automatic messages

*Kind, clear words that do the work for you.*

- [ ] Booking confirmation: date, time, location, what to bring, how to prepare
- [ ] Reminder 24 to 48 hours before, with a link to reschedule
- [ ] Follow-up after the session with aftercare and a rebooking link
- [ ] Make sure every message includes your contact details

## Step 6: Test and share

*Book yourself before you invite anyone else.*

- [ ] Make a test booking on your phone and on a computer
- [ ] Check the confirmation and reminder emails arrive and read well
- [ ] Cancel and reschedule your test booking to confirm both work
- [ ] Add your booking link to your website, email signature, and social profiles
- [ ] Tell your community you are now taking bookings online

# A gentle next step

Once booking runs on its own, you get your time and attention back for the work you love.

Want this done for you? The Serene Source offers ready-made client forms, starter kits, and landing pages for holistic and energy practitioners.

theserenesource.com

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