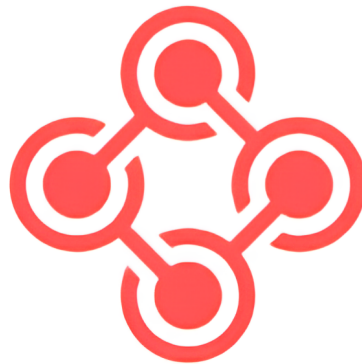


Handbook for Local Service Providers: Streamlining Workflows



BIZNEYS

[Subscribe Once, Enjoy Local Services Across Multiple Branches Worldwide! - Local Services Marketplace](#)

1. Introduction

This guide is designed to optimize workflows for **Local Services** by streamlining scheduling and attendance management. It focuses on **expert matching, space rentals, and equipment rentals**, which can be offered on a **session-based** (e.g., 10-session pass) or **time-based** (e.g., 1-month pass, annual membership) membership basis, across various industries, including:

- **Fitness Centers:** Yoga, Pilates, Gym Management
- **Art Academies:** Music, Dance, Painting, Acting

- **Educational Institutes:** Language Schools, Tutoring, Test Prep
- **Beauty Services:** Spas, Salons, Nail Shops
- **Recreational Activities:** Golf Lessons, Swimming, Skiing
- **Therapy Services:** Counseling, Rehabilitation, Physiotherapy

Whether you are an Admin or a Staff member, this guide provides the tools to effectively manage clients, streamline workflows, and automate processes with ease.

Table of Contents

- 1. Introduction
- 2. List Management
 - 2.1. Inquiry Form and Responses
 - 2.2. Admin and Staff List
 - 2.3. Client List (Time-Based Membership)
 - 2.4. Client List (Session-Based Membership)
- 3. Schedule Management
 - 3.1. Calendar Settings
 - 3.2. Schedule Settings
- 4. Session and Attendance Management
 - 4.1. Session Deduction (Attendance Check)
 - 4.2. Session Addition (Payment Confirmation)
- 5. Templates

For inquiries, please contact us at smal.co.kr.

2. List Management

This section introduces the essentials of list management, focusing only on the necessary databases required for efficient operations. By leveraging minimal yet critical data, we ensure smooth and effective management without overloading the system. It allows you to effectively manage both staff and client information, while sending notifications through filterable lists and automation tools.

2.1. Inquiry Form and Responses

- Details to include: **Client Name, Email, Desired Service, Inquiry Details, and Submission Time**
- Optional: **Available Days and Times**
 - This information is used to match clients with the appropriate staff. Since some services may require recurring schedule adjustments, it's important to specify the client's general availability (e.g., Wednesday after 6 PM, Friday from 5 PM to 8 PM).

Inquiry Form
Description (optional)

This form is public. Anyone with the link can submit a response. [Change](#)

Name*
Respondent's answer

Email*
Respondent's answer

Desired Service*
 Service A
 Service B
 Service C
 + Add option

Available Days and Times
 Used to match with the appropriate staff. Since this service may require recurring schedule adjustments, please specify your general availability (e.g., Wednesday after 6 PM, Friday from 5 PM to 8 PM).
 Respondent's answer

Inquiry Details
 Respondent's answer

Consent to Collect Personal Information*
 Check box label (optional)

+

2.2. Admin and Staff List

- Share this with staff to clarify individual responsibilities.
- Maintain details such as **Roles, Assigned Service Types, and Available Days and Times.**

☰ All

Aa Name	@ Email	☰ Role	☰ Service	☰ Available Days and Times	☰ Notes
Admin A		Admin	Service A		
Staff A		Staff	Service A Service B Service C		
Staff B		Staff	Service B		

+ New page

2.3. Client List (Time-Based Membership)

- Categorize clients under **weekly, monthly, or yearly membership plans.**
- Add fields: **Start Date, End Date, Remaining Days**

Use the example below to filter and categorize clients accordingly.

1. Remaining Days ≥ 0 → Enrolled
 - a. Remaining Days ≥ 7 → Payment Completed
 - b. $7 >$ Remaining Days ≥ 0 → Re-registration Needed
2. Remaining Days < 0 → No Longer Enrolled

☰ All ☑ Enrolled ☑ Re-registration Needed ☑ No Longer Enrolled

↑ Name ▾ ⚙ Staff ▾ ⚙ Service ▾

Aa Name	@ Email	⚙ Service	⚙ Staff	📅 Start Date and End Date	Σ Remaining Days	🕒 Registration Date (Creat...	☰ Notes
Client A		Service A		December 18, 2024 → December 20, 2024	-2	December 18, 2024 11:42 AM	Re-registration Needed
Client B		Service B		December 20, 2024 → December 27, 2024	4	December 18, 2024 11:42 AM	Please record important custom
Client C		Service C		February 20, 2025 → February 20, 2025	59	December 20, 2024 11:38 AM	Please record important custom
Client D						December 20, 2024 11:55 AM	No Longer Enrolled

+ New page

All

☰ All ☑ Enrolled ☑ Re-registration Needed ☑ No Longer Enrolled

↑ Name ▾ Σ Remaining Days ≥ 0 ▾ 📅 Start Date and End Date: Is not empty ▾

Aa Name	@ Email	⚙ Service	⚙ Staff	📅 Start Date and End Date	Σ Remaining Days	🕒 Registration Date (Creat...	☰ Notes
Client B		Service B		December 20, 2024 → December 27, 2024	4	December 18, 2024 11:42 AM	Please record important custom
Client C		Service C		February 20, 2025 → February 20, 2025	59	December 20, 2024 11:38 AM	Please record important custom

+ New page

Enrolled

☰ All ☑ Enrolled ☑ Re-registration Needed ☑ No Longer Enrolled

↑ Name ▾ Σ Remaining Days < 7 ▾ 📅 Start Date and End Date: Is not empty ▾

Aa Name	@ Email	⚙ Service	⚙ Staff	📅 Start Date and End Date	Σ Remaining Days	☰ Notes	🕒 Registration Date (Creat...
Client A		Service A		December 18, 2024 → Decemb	-2	Re-registration Needed	December 18, 2024 11:42 AM
Client B		Service B		December 20, 2024 → Decemb	4	Please record important custom	December 18, 2024 11:42 AM

+ New page

Re-registration Needed

☰ All ☑ Enrolled ☑ Re-registration Needed ☑ No Longer Enrolled

↑ Name ▾ 📅 Start Date and End Date: Is empty ▾

Aa Name	@ Email	⚙ Service	⚙ Staff	📅 Start Dat...	Σ Remaining Days	🕒 Registration Date (Creat...	☰ Notes
Client D						December 20, 2024 11:55 AM	No Longer Enrolled

+ New page

No Longer Enrolled

2.4. Client List (Session-Based Membership)

- Organize clients using **session-based services**.

- Include fields: **Used Sessions, Total Sessions Purchased, Remaining Sessions**

Use the example below to filter and categorize clients accordingly.

1. Total Sessions > 0 → **Enrolled**
 - a. Remaining Sessions > 0 → **Payment Completed**
 - b. Remaining Sessions = 0 → **Re-registration Needed**
 - c. Remaining Sessions < 0 → **Payment Overdue (Re-registration Needed)**
2. Total Sessions = 0 → **No Longer Enrolled**

All
 Re-registration Needed
 Enrolled
 No Longer Enrolled

Aa Name	@ Email	Service	Staff	# Used Sessions	# Total Sessions	Σ Remaining Sessions	Notes	Registration Date (Creat...
Client A		Service A		5	4	-1	Payment Overdue (Re-Registrati	December 19, 2024 12:43 PM
Client B		Service A		4	4	0	Re-Registration Needed	December 19, 2024 12:43 PM
Client C		Service A		3	4	1	Please record important custom	December 19, 2024 12:43 PM
Client D		Service B		2	4	2	Please record important custom	December 19, 2024 12:43 PM
Client E		Service A		0	4	4	4-Session Pass Registered	December 19, 2024 12:43 PM
Client F		Service C		1	1	0	One-Time Trial Service Used	December 19, 2024 12:43 PM
Client G		Service A		0	1	1	One-Time Trial Service Register	December 19, 2024 12:43 PM
Client H		Service B			0	0	No Longer Enrolled	December 19, 2024 12:43 PM

+ New page

VALUES 8

All

All
 Re-registration Needed
 Enrolled
 No Longer Enrolled

Aa Name	@ Email	Service	Staff	# Used Sessions	# Total Sessions	Σ Remaining Sessions	Registration Date (Created time)	Notes
Client A		Service A		5	4	-1	December 19, 2024 12:43 PM	Payment Overdue (Re-Registrat
Client B		Service A		4	4	0	December 19, 2024 12:43 PM	Re-Registration Needed
Client F		Service C		1	1	0	December 19, 2024 12:43 PM	One-Time Trial Service Used

+ New page

Re-registration Needed

All Re-registration Needed **Enrolled** No Longer Enrolled

↑ Name ↓ # Total Sessions > 0 ↓

Aa Name	@ Email	○ Service	👤 Staff	# Used Sessions	# Total Sessions	Σ Remaining Sessions	🕒 Registration Date (Created time)	☰ Notes
Client A		Service A		5	4	-1	December 19, 2024 12:43 PM	Payment Overdue (Re-Registrat
Client B		Service A		4	4	0	December 19, 2024 12:43 PM	Re-Registration Needed
Client C		Service A		3	4	1	December 19, 2024 12:43 PM	Please record important custom
Client D		Service B		2	4	2	December 19, 2024 12:43 PM	Please record important custom
Client E		Service A		0	4	4	December 19, 2024 12:43 PM	4-Session Pass Registered
Client F		Service C		1	1	0	December 19, 2024 12:43 PM	One-Time Trial Service Used
Client G		Service A		0	1	1	December 19, 2024 12:43 PM	One-Time Trial Service Register

+ New page

Enrolled

All Re-registration Needed Enrolled **No Longer Enrolled**

↑ Name ↓ # Total Sessions = 0 ↓

Aa Name	@ Email	○ Service	👤 Staff	# Used Sessions	# Total Sessions	Σ Remaining Sessions	🕒 Registration Date (Creat...	☰ Notes
Client H		Service B			0	0	December 19, 2024 12:43 PM	No Longer Enrolled

+ New page

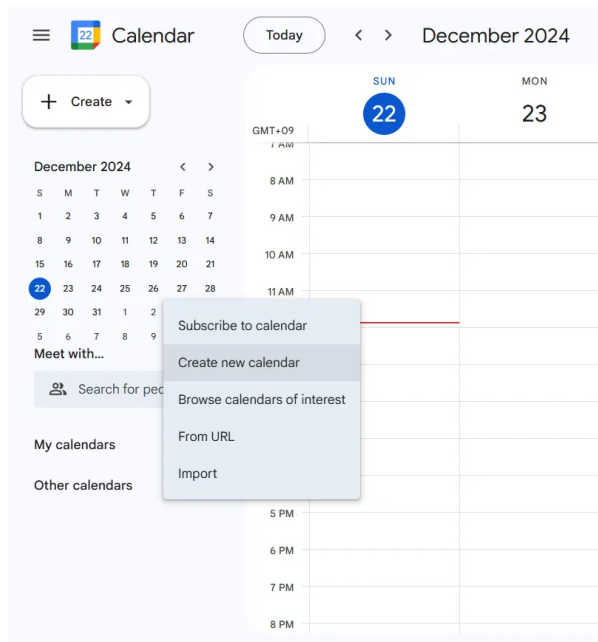
No Longer Enrolled

3. Schedule Management

With proper integration of **Google Calendar** and **Notion Calendar**, you will streamline scheduling, automate notifications, and enhance your clients' experience.

3.1. Calendar Settings

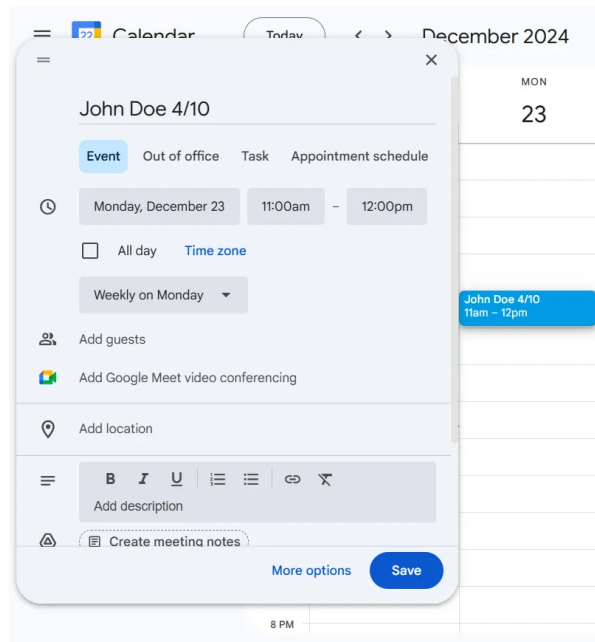
1. **Create:** Assign unique calendars to staff or services to avoid overlap.
2. **Invite:** Staff members who are not invited to the calendar cannot view its contents.
3. **Filter:** Customize views by calendars. You can view the calendars of all admins and staff in one place.



Create a New Calendar in Google Calendar

3.2. Schedule Settings

1. **Create:** Add schedule details like time, location, and participants.
2. **Recurring Schedules:** Automate recurring schedules for weekly, monthly, or custom cycles.
3. **Automated Reminders:** Schedule email or pop-up reminders for both clients and staff using Google Calendar's email invites(**Add guests**) or Notion comments(**@Name**).
4. **Session Tracking:** Add Used/Total Sessions to **Title** Next to Name (e.g., John Doe 4/10)



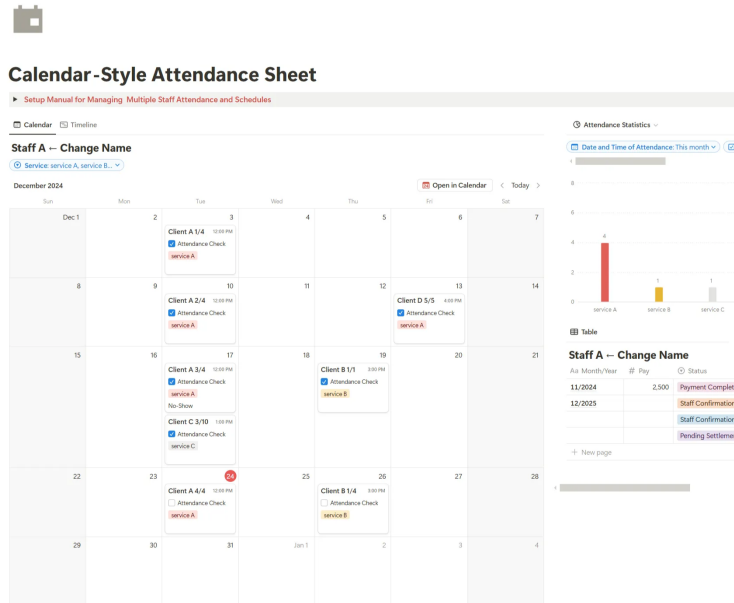
Create a New Event in Google Calendar

4. Session and Attendance Management

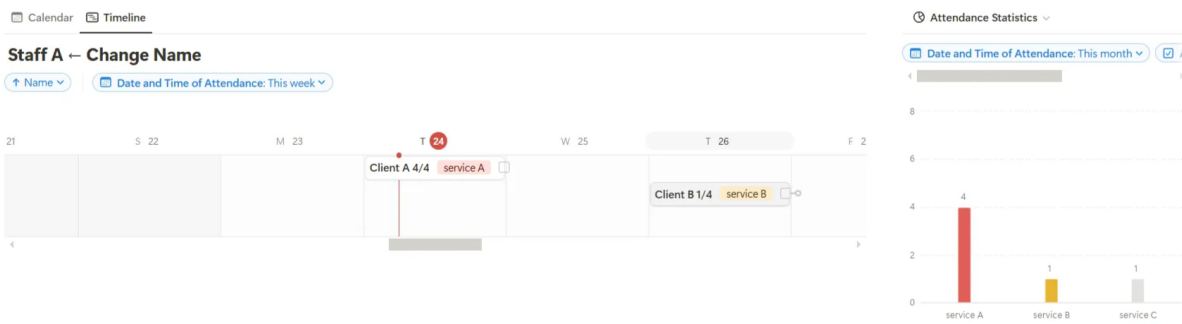
Track attendance directly from the calendar, using filters to verify session counts and calculate freelancer payments. Set clear attendance rules, including penalties for late arrivals, no-shows, and automatic deductions. After payment confirmation, update the client list with total sessions, and consider using subscription billing for recurring payments to simplify follow-ups, improve retention, and automate payments, reducing administrative tasks for both vendors and clients.

4.1. Session Deduction (Attendance Check)

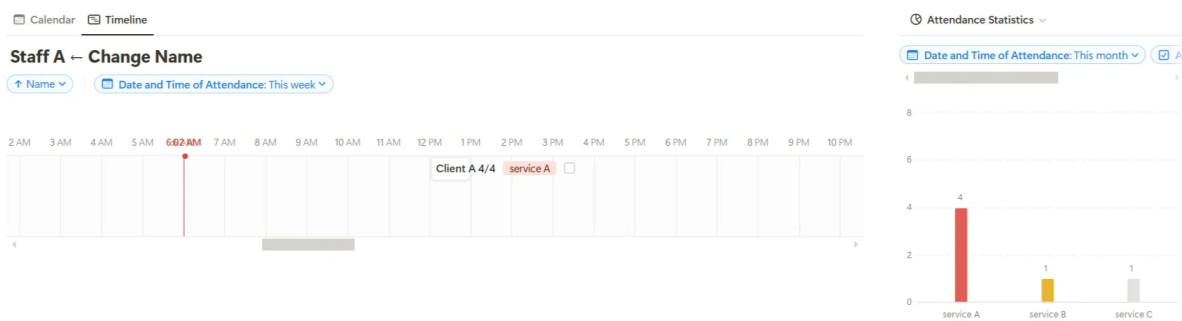
- **Calendar-Style Attendance Sheet**
 - Check attendance directly from the calendar schedule.
 - Use **Client List (Session-Based Membership)** for **cross-verification**.
 - By using filters, you can track the total number of attendances for each service per month, which can be used to calculate freelancer payments (e.g., service price per session * monthly occurrences).



Calendar View - Week



Timeline View - Week



Timeline View - Day

- **Create your own attendance rules tailored to your business operations, using these as a guide:**
 1. **On-time Attendance:** Clients must arrive on time. Late arrivals within 15 minutes may proceed with no session reduction.

2. **Late Arrivals:** Clients arriving after 15 minutes may face session reduction or cancellation.
3. **No-Shows:** Missing a session without prior notice results in automatic session deduction. Cancellations must be made 24 hours in advance.
4. **Schedule Changes:** Late changes require at least 24 hours' notice. Fees may apply for last-minute adjustments.
5. **Automatic Deductions:** Set rules for automatic session deductions, including for no-shows or late sessions.


Use these as a foundation to create rules suitable for your needs.

4.2. Session Addition (Payment Confirmation)

- After confirming the payment, **add the total sessions to Client List (Session-Based Membership)**.
- If recurring payment reminders and follow-ups are hassle, consider using **subscription billing**. It applies to both time-based and session-based members.
 - Allow clients to subscribe to regular services like classes, or rentals.
 - Automate payments to reduce administrative hassle for both vendors and clients.
 - Improve client retention through streamlined processes and loyalty programs tied to subscriptions.
 - **[Create and Sell Memberships That Provide Access to Multiple Branches Worldwide. \(Click\)](#)**



Catalog Downloadable

Product Title

Sign-up fee (\$)  e.g. 9.90

Free Trial  0 day 

Subscription price (\$)  every  month 

Expire after  Do not stop until cancelled 

Sale Price (\$)


[schedule](#)


[Upload Subscription Memberships on BIZNEYS](#)


5. Templates


Duplicate Notion templates and start using instantly!

The full version is available on BIZNEYS. Please visit our store to access it.
(Visit Store)

 [Inquiry Form and Responses](#)

 [Admin and Staff List](#)

 [Client List \(Time-Based Membership\)](#)

 [Client List \(Session-Based Membership\)](#)

 [Calendar-Style Attendance Sheet](#)

If you need the latest version of this eBook, please refer here. (Click).

© SMAL Inc. All rights reserved.