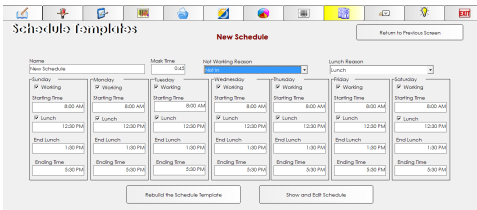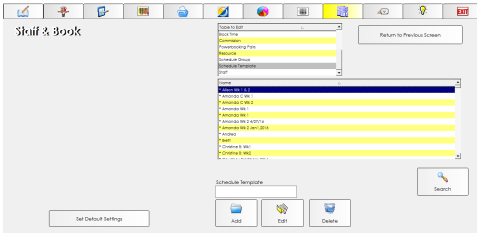# schedule templates

Use this guide to create, edit, and customize your schedule templates.

Create a New Schedule Template

1. From Blueprints, click the Staff & Book button, and select the Schedule Template table from the list.
2. Click the Add button, and type the name of the Schedule Template you'd like to create. Click the Add button.
3. Once in the schedule template, choose a mask time, if desired.
4. Select the Not Working and Lunch block reasons.
5. Uncheck each day the staff member should be blocked all day, as well as each lunch the staff member should not be blocked.
6. Set the Starting Time, Lunch Time, and End Time for each day.
7. Click the Rebuild the Schedule Template button, and click Yes.
8. Verify each day in the Show and Edit screen. Click the Return to Edit button to make more changes.
9. Click the Return to Previous button to return to Staff & Book.
   ❖ View the Adding a Staff user guide for instructions on linking a template to a staff member.

Edit an Existing Schedule Template

1. From Blueprints, click the Staff & Book button, and select the Schedule Template table from the list.
2. Select the desired template, and click the Edit button.
3. Make the necessary changes, and click the Rebuild the Schedule Template button. Click Yes to the prompt.
4. Verify each day in the Show and Edit screen. Return to Edit to make any additional changes.
5. Click the Return to Previous button to return to Staff & Book.

Customizing a Schedule Template

Follow these steps to create a schedule template using custom mask times for maximum productivity, as well as multiple scheduled breaks in the workday. We will work through two examples; feel free to experiment with moving, editing, and creating blocks and masks with a test template to practice.

1. From Blueprints button, click the Staff & Book button, and select the Schedule Template table from the list.
2. Add a new template, or Edit an existing template.
3. Follow the steps above in the Create a New Schedule Template section through Step 8.
   ❖ In the Show and Edit screen, follow the steps in the example below to add additional breaks in the schedule.

1. In our example, we want our staff to take 2 15-minute breaks in addition to lunch daily.
2. You will need to draw blocks on open space. If you have a mask time where you want the block, place your mouse cursor at the top or bottom of the mask so that you see the double-ended arrow. Click and drag up or down to change the length of the mask time. Each space is 15 minutes.
3. Once you have open space in which to draw a block, click the Blocked Reason radio button, and select a reason from the drop-down.
4. To draw a new block, place your mouse cursor over open space, so that you see the crosshairs.
5. Click and drag up or down to draw the block to your desired length. Each space is 15 minutes.
6. Click the Return to Previous button to return to Staff & Book.
   ❖ View the Adding a Staff user guide for instructions on linking a template to a staff member.

❖ In the Show and Edit screen, follow the steps in the example below to make custom mask times.
1. In our example, we want our staff to have a 2 hour mask time on Friday mornings for model highlight services.
2. Place your mouse cursor at the top or bottom of the mask time so that you see the double-ended arrow.
3. Click and drag up or down to change the length of the mask time. Each space is 15 minutes.
4. Click the Return to Previous button to return to Staff & Book.
   ❖ View the Adding a Staff user guide for instructions on linking a template to a staff member.

❖ After editing your templates to be just how you like it, be careful not to click the Rebuild the Schedule Template button in the main template screen. If you do by mistake, click the No button on the next prompt. Clicking Yes will revert your template to the schedule set in the main form.