



CLIENT & AGENCY RESPONSIBILITIES

What is required before setup, launch and ongoing operation

PURPOSE

This guide outlines the information, approvals, access and ongoing duties required from the client and Blue Collar Digital before an automated booking system is implemented.

1

BUSINESS & BOOKING INFORMATION

Information the client provides before implementation begins

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| <ul style="list-style-type: none">• Legal business name• Public-facing business name• Website address and primary contact details• Complete physical business address• Business hours, holidays and after-hours procedures• Services customers may book online | <ul style="list-style-type: none">• Normal service area and appointment locations• Length of each service or appointment• Prices, estimates, deposits or payment requirements• Minimum notice and maximum advance booking window• Cancellation, rescheduling and no-show policies• Privacy-policy and terms pages, if available |
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CLIENT RESPONSIBILITY

The client is responsible for providing complete and accurate booking information and for confirming that the authorized owner may approve the setup.



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SERVICES, AVAILABILITY & CALENDARS

What can be booked and when appointments should be offered

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| <ul style="list-style-type: none">• Services assigned to each employee or team• Working hours and recurring availability• Appointment length for each service• Buffers before or after appointments• Travel time for on-site appointments• Blocked dates, vacations and holidays | <ul style="list-style-type: none">• Minimum notice required before booking• How far in advance customers may book• Maximum simultaneous appointments or capacity• Location, room, vehicle or equipment limits• Correct time zone for the business and customers• Google or Microsoft calendars to connect |
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STAFF AND ACCESS INFORMATION

Details required for every employee who will use HighLevel

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| <ul style="list-style-type: none">• Full name• Work email• Mobile number• Job role | <ul style="list-style-type: none">• Services assigned• Permission level• Calendar to connect• Work schedule or availability |
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CALENDAR BEST PRACTICE

Each staff member should connect the calendar they actually use and keep blocked time current to reduce double-bookings.

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CUSTOMER & MESSAGE REQUIREMENTS

Decisions that shape the booking form, confirmations and reminders

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| <ul style="list-style-type: none">• Customer details and questions to collect• Desired tone: friendly, professional, rugged or urgent• Confirmation email and text-message wording• When reminders should be sent• Arrival, location or preparation instructions | <ul style="list-style-type: none">• Whether customers may reschedule or cancel themselves• Who answers booking questions and customer replies• Whether English, French or another language is required• Consent, privacy and opt-out wording• Follow-up steps after the appointment |
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CHOOSING THE BOOKING ARRANGEMENT

The most important implementation decision

Choose the approach that best balances customer convenience, website control, setup effort and integration risk. Responsibilities differ depending on the selected option.

OPTION A

Use a HighLevel booking page

QUICK LAUNCH

THE CLIENT

- Approves services, staff, availability and policies
- Approves the page content and branding
- Adds the booking link to its website, Google Business Profile, social pages and email signature
- Notifies Blue Collar Digital when services or hours change

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- Builds a branded booking page inside the client sub-account
- Configures the form, calendar, confirmations and reminders
- Connects staff calendars and routing rules
- Tests the full booking journey on desktop and mobile

OPTION B

Embed the calendar on the existing website

RECOMMENDED

THE CLIENT

- Provides website access or works with its website provider
- Approves the page location and booking call-to-action
- Keeps its privacy-policy and terms pages current
- Avoids uncoordinated changes to the embed or booking page

BLUE COLLAR DIGITAL

- Creates an embed-ready HighLevel calendar
- Adds the embed when access is granted or supplies the code
- Matches the website branding where practical
- Tests responsive layout, confirmations, reminders and CRM entry



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OPTION C

Connect an existing booking platform

KEEP CURRENT SOFTWARE**THE CLIENT**

- Keeps the existing booking subscription active
- Provides administrator or integration access
- Identifies which system is the official source of appointment data
- Accepts any third-party fees, limits or duplicate-entry risk
- Tests the daily workflow and reports problems promptly

BLUE COLLAR DIGITAL

- Checks native, API, Zapier or Make integration options
- Maps customer, service, employee and appointment fields
- Builds automation around the existing platform
- Tests new bookings, cancellations, rescheduling and duplicates
- Documents limitations and unsupported functions

IMPORTANT

Integration quality depends on the capabilities of the existing booking software. Some systems may require extra subscriptions, manual steps or a different setup approach.

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CLIENT RESPONSIBILITIES AFTER LAUNCH

Ongoing account, calendar, operations, compliance and optimization tasks

ACCOUNT & BILLING

- Keep HighLevel and connected services active
- Pay calendar, email, SMS and integration charges
- Keep business and billing information current

CALENDAR MANAGEMENT

- Maintain hours, blocked time, vacations and holidays
- Keep connected calendars authorized and syncing
- Notify Blue Collar Digital about staff or service changes

DAILY OPERATIONS & COMPLIANCE

- Review new bookings and respond to customer questions
- Honour cancellations, rescheduling and opt-out requests
- Protect customer information and use approved messages
- Report delivery or synchronization problems promptly

REVIEW & IMPROVEMENT

- Review booking completion, no-shows and missed opportunities
- Confirm services and availability remain accurate
- Approve future workflow, form or message changes
- Train replacement employees on the booking process