Bookings & Appointments

User Guide

Odoo 18 / 19 · Community Edition

Membership, Events & Education

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1. Overview

Bookings & Appointments is a complete Community alternative to the Enterprise Appointments app. It lets you publish bookable resources — rooms, equipment or staff — define appointment types with their own duration, buffer and capacity, and manage the full booking lifecycle from draft through to completion.

Each booking is matched against the resource's weekly availability rules and is checked for double-booking conflicts automatically. Email reminders are sent by a scheduled action a configurable number of hours before the appointment.

Who is it for?

Clinics, salons, consultancies, training centres, equipment-hire businesses and any team that schedules people or rooms against a calendar without paying for Odoo Enterprise.

Technical name	gb_bookings_appointments
Category	Membership, Events & Education
Depends on	base, mail, resource
Edition	Odoo 18 / 19 Community (no Enterprise required)
Licence	LGPL-3

2. Installation

The module installs like any standard Odoo application. You need a user with the Administration / Settings access right to add an app.

- Activate Developer Mode (Settings ▸ General Settings ▸ Developer Tools) if the Apps menu is hidden.
- Open Apps and click Update Apps List so Odoo re-scans the add-ons path.
- Search for “Bookings & Appointments” (technical name **gb_bookings_appointments**).
- Click Install. Odoo loads the models, security groups, menus and any scheduled actions.
- Refresh the browser; the new top-level menu Bookings appears.

Dependencies

This app depends on base, mail, resource. Odoo installs any missing dependency automatically.

3. Configuration

All configuration lives under the Bookings menu. Set up your appointment types and resources once, then your team simply creates bookings.

Appointment Types — Bookings ▸ Configuration ▸ Appointment Types

Create the services you offer. Each type carries a duration, a buffer applied before/after, a capacity (how many parallel bookings a slot allows) and an assignment policy. The type drives slot generation.

Bookable Resources — Bookings ▸ Configuration ▸ Resources

Define the rooms, equipment or staff that can be booked. Each resource has weekly availability rules (gb.appointment.slot.rule) describing the days and hours it is open, plus its own capacity.

Reminder schedule

A scheduled action (ir.cron) runs _cron_send_reminders and emails the booking reminder template a configurable lead time before each confirmed appointment.

4. Step-by-step Usage Walkthrough

A typical booking moves through Operations ▸ Bookings, or is created with the Schedule wizard. The flow is draft → confirmed → completed.

Step	What you do
1. Open	Go to Bookings ▸ Operations ▸ Bookings and click New, or use Schedule to open the scheduling wizard.
2. Find slot	In the wizard, choose the appointment type, date and resource, then Search to list the free slots returned by the type.
3. Book	Pick a slot and the customer; Book creates the booking in Draft. The system checks the resource is free (no conflict).
4. Confirm	Press Confirm (action_confirm). The booking becomes Confirmed and is now eligible for a reminder email.
5. Complete	After the appointment press Mark Done; or use No Show / Cancel. Reset to Draft reopens a record if needed.
6. Export	Use Export ICS to download the appointment as a calendar (.ics) file for the customer or staff calendar.

Status lifecycle

Draft → Confirmed → Completed, with side states No Show and Cancelled. Conflict detection blocks two bookings overlapping on the same resource.

5. Feature Reference

Appointment types

Reusable service definitions carrying duration, buffer, capacity and assignment policy; the engine asks a type for free slots on a given day.

Bookable resources

Rooms, equipment and staff with weekly availability rules and per-resource capacity, built on Odoo's resource framework.

Conflict detection

Before a booking is confirmed the module checks the resource is not already booked in the same window, preventing double-booking.

Booking lifecycle

Draft, Confirmed, Completed, No Show and Cancelled states, with mail.thread chatter and activity tracking on every booking.

Email reminders

A scheduled action emails a mail template to the customer a configurable number of hours before each confirmed booking.

Schedule wizard

A self-service style wizard that searches free slots and books in two clicks, plus calendar views of the resource.

ICS export

Each booking can be exported as an .ics calendar attachment via action_export_ics.

6. Tips, Troubleshooting & FAQ

Q. Why can't I confirm a booking?

A. The resource is already booked for an overlapping window, or the slot falls outside the resource's availability rules. Pick a free slot.

Q. Reminders are not sending.

A. Check the scheduled action is active under Settings ▸ Technical ▸ Scheduled Actions, that the booking is Confirmed, and that the customer has an email address.

Q. Can two people use the same slot?

A. Yes, if the appointment type or resource capacity is greater than one. Capacity controls how many parallel bookings a slot accepts.

Q. Do I need Odoo Enterprise?

A. No. The module is pure Community and only depends on base, mail and resource.

Q. How do I mark someone who didn't turn up?

A. Open the booking and press No Show; it is recorded separately from a normal cancellation for reporting.

Q. Can a customer book themselves?

A. The Schedule wizard provides a self-service style flow; expose it through a menu or action for front-desk or portal use.

7. Support

We provide application support and integration guidance for this module. If you hit an issue, please include your Odoo version (18 or 19), the module version, and a short description with a screenshot.

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Licence	LGPL-3

Thank you for choosing Bookings & Appointments. This guide documents the features as implemented in the module; menu labels and field names match what you see in Odoo.