Scheduler Booking Terms Guide

A complete guide to term-based booth scheduling

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Introduction to Booking Terms

What Are Booking Terms?

A **booking term** is a grouping mechanism that bundles one or more market events together for pricing and invoicing purposes. When you assign a vendor to booth spaces, the system creates a term that determines how those events are priced and billed.

Terms are the foundation of the scheduler's pricing system. They allow markets to offer different pricing structures based on how vendors commit to their booth space—whether for a single day, a full week, an entire month, or all events.

Why Term-Based Pricing Matters

Term-based pricing provides flexibility for both markets and vendors:

- **Volume discounts:** Markets can offer better rates for longer commitments
- **Predictable revenue:** Events terms help markets forecast income
- **Vendor flexibility:** Vendors can choose commitment levels that fit their needs
- **Simplified billing:** Multiple events are grouped into single invoices
- **Automated pricing:** The system calculates correct prices based on term type

Overview of the Four Term Types

The scheduler supports four term types, each representing a different commitment level:

- **Day:** Single market day bookings—maximum flexibility, typically highest per-day rate
- **Week:** All events in a calendar week grouped together—moderate commitment
- **Month:** All events in a calendar month grouped together—longer commitment
- **Events:** All events grouped together—maximum commitment, typically best rate

Understanding Term Types

Day Terms

Day terms are the smallest booking unit. Each day term covers exactly one market event. This is ideal for vendors who want maximum flexibility or are testing a new market.

Events Included	Single market day
Grouping Logic	Each event gets its own term
Best For	Occasional vendors, new vendors, fill-in bookings
Invoice Behavior	One invoice item per day term

Week Terms

Week terms group all market events within a calendar week (Sunday through Saturday) into a single booking unit. The week is determined by the event's week number in the calendar year.

Events Included	All events in the same calendar week
Grouping Logic	Events grouped by week_num
Best For	Vendors attending multiple days per week
Invoice Behavior	One invoice item per week term

Note: If a market has events on Saturday and Sunday of the same weekend, they will be in different week terms because they span two calendar weeks.

Month Terms

Month terms group all market events within a calendar month into a single booking unit. This provides a good balance between commitment and flexibility.

Events Included	All events in the same calendar month
Grouping Logic	Events grouped by month_num and year_num
Best For	Regular vendors with monthly commitment
Invoice Behavior	One invoice item per month term

Events Terms

Events terms are the largest booking unit, covering all events. This typically offers the best per-day rate but requires the highest commitment level.

Events Included	All events
Grouping Logic	Single group for all events
Best For	Committed vendors who attend every market day
Invoice Behavior	One invoice item for all events

Term Type Comparison

Here's a quick comparison of all four term types:

Term Type	Events Included	Partial Debook Result
Day	Single day	Term deleted, day marked pending
Week	All events in week	Entire week term deleted, all days pending
Month	All events in month	Entire month term deleted, all days pending
Events	All events	Entire events term deleted, all pending

Assigning Booths with Terms

Step-by-Step Assignment Workflow

Assigning booths in the scheduler follows a consistent workflow regardless of which term type you choose. Here's how it works:

Step 1: Select Events

In the scheduler grid, select the event cells you want to book for the vendor. You can select multiple events by clicking and dragging, or by holding Ctrl/Cmd while clicking individual cells.

Step 2: Open the Assignment Modal

Right-click on the selected cells and choose **"Assign"** from the context menu, or use the keyboard shortcut. This opens the booth assignment modal.

Step 3: Select the Term Type

In the assignment modal, choose the term type that matches the vendor's commitment level. The available options depend on your market's configuration.

Important: The term type you select affects pricing and determines how events will be grouped. Choose carefully based on the vendor's commitment and your market's pricing structure.

Step 4: Choose Booths and Spaces

Select the booth spaces to assign. You can assign multiple spaces if the vendor needs more room. Each space will be included in the term.

Step 5: Add Rentals (Optional)

If your market offers equipment rentals (tables, tents, electricity, etc.), you can add them here. Rentals are priced according to the term type and included in the same invoice.

Step 6: Review and Confirm

Review the assignment summary showing:

- Events being booked
- Spaces being assigned
- Rentals being added
- Calculated prices by term type
- Total amount for the booking

Click **"Confirm"** to complete the assignment.

What Happens When Assigning Events

Term Creation Process

When you confirm a booth assignment, the system performs several operations behind the scenes:

- Creates one or more **booking terms** based on the term type you selected
- Links each selected event to its appropriate term
- Calculates prices based on the term type's pricing rules
- Creates **draft invoices** with line items for spaces and rentals
- Updates the scheduler grid to show the booking

Event Grouping Logic by Term Type

The system groups events differently depending on the term type selected:

Term Type	Grouping Field	Example
Day	event.id	Each event = 1 term
Week	event.week_num	Events in week 23 = 1 term
Month	event.month_num + year_num	June 2024 events = 1 term
Events	All events	All events = 1 term

Draft Invoice Creation

Each term generates a **draft invoice** containing:

- **Space line items:** One item per booth space assigned
- **Rental line items:** Items for any equipment rentals added
- **Calculated amounts:** Prices based on term type pricing configuration
- **Due date:** Calculated based on term type (e.g., weekly terms due at week start)

Draft invoices are not sent to vendors automatically. They remain in draft status until you explicitly release them. This gives you time to review and make adjustments before billing.

Price Calculation and Breakdowns

The scheduler calculates prices using your market's fee configuration. Different term types can have different base prices, allowing you to offer discounts for longer commitments.

For example, if your pricing is:

- Day rate: $50 per day
- Week rate: $200 per week (saves $50 vs. 5 day rates)
- Month rate: $700 per month (saves $100 vs. 4 week rates)
- Events rate: $2,500 for all events (saves $300 vs. 4 month rates)

The system will automatically apply the correct rate based on the term type selected during assignment.

Unbooking for a Day (Debook Workflow)

Critical Concept: When you "debook" (unbook) even a single day, the system removes the entire term that contains that day—not just the individual day. This is a fundamental principle of term-based booking.

Why Unbooking Removes the Entire Term

Terms are priced as units, not as collections of individual days. A week term has a week price, not 7 × day price. Therefore, you cannot partially fulfill a term—either the vendor has the whole term or none of it.

When a vendor needs to miss a day that's part of a larger term (week, month, or events), the proper workflow is:

- Unbook the entire term
- Rebook the days they can attend with appropriate term type(s)
- Process refunds/credits as needed

How the Debook Modal Works

To debook events:

- Select the booked event(s) in the scheduler grid
- Right-click and choose **"Unbook"** from the context menu
- The debook modal shows all events in the affected term(s)
- Review the refund amount that will be generated
- Confirm to proceed with the debook

Event Selection and Group Behavior

When you select events to debook, the modal will show **all events** in the affected terms, not just the events you selected. This ensures you understand the full impact of the debook action.

For example, if you select one Wednesday to debook from a week term, the modal will show all 5 market days in that week term, indicating they will all become pending again.

What Happens to Remaining Events

After a debook, all events that were in the deleted term are marked as **pending**. They appear in the scheduler as unbooked cells, ready to be assigned again with a new term.

This means you can then:

- Rebook the same vendor with a different term type
- Rebook individual days as day terms
- Assign the space to a different vendor
- Leave the space unbooked

Refund Invoice Creation

When you debook a term that has a released (paid or sent) invoice, the system automatically creates a **refund invoice**. This is a negative invoice that offsets the original charge.

- Refund invoices have negative line item amounts
- They reference the original invoice for tracking
- Depending on settings, refunds can be applied as credits or actual refunds

• If the original invoice was unpaid, it may be voided instead

Invoice Integration with Terms

Draft Invoices vs Released Invoices

The scheduler creates invoices in **draft status**. Draft invoices:

- Are not visible to vendors
- Can be freely edited (add/remove items, change amounts)
- Can be deleted without consequences
- Do not generate notifications

Released invoices (ONE_TIME status) are the opposite:

- Are visible to vendors in their dashboard
- Generate email notifications when released
- Cannot be directly edited—changes create adjustment invoices
- Require refund invoices for cancellations

Invoice Items Linked to Spaces and Rentals

Each invoice contains line items that link back to the term's components:

Item Type	Source	Description Format
Space	Booth assignment	"Corner Booth - Week 23"
Rental	Equipment rental	"Table (x2) - Week 23"
Adjustment	Post-release change	"Adjustment: added table"

This linkage allows the system to track what each charge is for and automatically handle refunds when bookings change.

Releasing Invoices

You have several options for releasing draft invoices:

Single Invoice Release

Release individual invoices one at a time. Good for spot-checking before sending or when handling special cases.

Merged Invoice Release

Combine multiple draft invoices for the same vendor into a single invoice. This reduces the number of notifications vendors receive and simplifies their payment process.

Auto-Pay Release

If vendors have auto-pay enabled (saved payment method), releasing an invoice will automatically charge their card. The invoice moves directly to paid status.

Tip: Review all draft invoices before a bulk release. Once released, changes require adjustment invoices which create more complexity.

Due Date Calculation by Term Type

Invoice due dates are calculated based on the term type and your market's configuration:

Term Type	Typical Due Date Logic
Day	Day of the event, or X days before
Week	Start of the week, or Monday of that week
Month	First day of the month
Events	First event date, or configured date

Correcting Mistakes: Unbooking Terms

Mistakes happen. A vendor was assigned to the wrong booth, the wrong term type was selected, or plans changed. Here's how to handle corrections.

When to Unbook vs When to Convert

You have two main options for correcting term assignments:

Action	Use When	Result
Unbook	Wrong vendor, wrong booth, cancel	Term deleted, pending
Convert	Wrong term type selected	Events re-grouped, new pricing

Unbooking is more drastic—it removes the booking entirely. Converting preserves the booking but changes how it's grouped and priced.

Unbooking Different Term Types

Unbooking Day Terms

Unbooking a day term is straightforward—only that single day is affected. The day becomes pending and can be reassigned.

Unbooking Week Terms

Unbooking any day from a week term removes the entire week. All days in that calendar week become pending. If you need to keep some days, you'll need to rebook them with day terms.

Unbooking Month Terms

Unbooking any day from a month term removes all days in that calendar month. This can be a significant change if the month is partially completed.

> **Warning: Unbooking a month term mid-month will mark all remaining days as pending, even days that have already occurred. Consider the timing carefully before unbooking month terms.**

Unbooking Events Terms

Unbooking any day from an events term removes all events. This is the most significant change and should be done with care.

Refund Handling

When you unbook a term with a released/paid invoice, refunds are generated automatically. How refunds are processed depends on your market's settings:

Credit Application

The refund amount is applied as a credit to the vendor's account. The credit automatically offsets future invoices. This is the default behavior.

Actual Refund

If enabled, the refund can be processed back to the vendor's original payment method. This requires additional steps and may involve payment processor fees.

Events Becoming Pending After Unbook

All events from an unbooked term revert to **pending** status. They:

- Appear as empty cells in the scheduler grid
- Can be assigned to any vendor with any term type
- Retain no record of the previous assignment in the scheduler view
- The previous assignment is preserved in the audit history

Correcting Mistakes: Converting Terms

What is Term Conversion?

Term conversion allows you to change a booking from one term type to another without completely unbooking and rebooking. It preserves the vendor's assignment while adjusting how events are grouped and priced.

Common conversion scenarios:

- Events term to month terms (vendor can't commit to all events)
- Month term to week terms (vendor needs more flexibility)
- Week term to day terms (vendor missing some days in the week)

Conversion Rules

Terms can only be converted to **smaller** term types. You cannot convert up to a larger term type.

From Term	Can Convert To
Day	Cannot convert (smallest unit)
Week	Day only
Month	Day, Week
Events	Day, Week, Month

Why no upward conversion? Converting to a larger term would require adding events that may already be assigned to other vendors. Instead, unbook and rebook with the larger term type.

Price Redistribution During Conversion

When converting terms, prices are recalculated based on the new term type's pricing. This typically results in a higher total cost since smaller term types usually have higher per-day rates.

For example, converting a $200 week term to 5 day terms at $50/day:

- Original week term: $200
- New day terms: 5 × $50 = $250
- Difference: $50 additional charge

The system generates adjustment invoices to account for price differences.

Split Invoice Option for Draft Invoices

When converting terms that have **draft invoices**, you have the option to split the invoice into multiple invoices matching the new term structure.

For example, converting a month term (1 draft invoice) to week terms can create 4 separate draft invoices—one for each week.

This is useful when:

- You want to release invoices on different schedules

- The vendor wants to pay for one week at a time
- Different weeks have different payment arrangements

Step-by-Step Conversion Workflow

- Select the booked events you want to convert in the scheduler grid
- Right-click and choose **"Convert Term"** from the context menu
- Select the new (smaller) term type from the dropdown
- Review the conversion summary showing old vs new term structure
- Review the price difference and adjustment amount
- Choose whether to split draft invoices (if applicable)
- Confirm to complete the conversion

Adjusting Existing Bookings

Sometimes you need to modify an existing booking without completely changing the term structure. The scheduler supports several types of adjustments.

Adding/Removing Booths from a Term

Vendors sometimes need more or less space than originally booked. You can add or remove booth spaces from an existing term.

Adding a Booth

- Select the additional space(s) for the same events
- Assign using the same term type as the existing booking
- The system creates new line items on the existing term's invoice
- If the invoice is released, an adjustment invoice is created

Removing a Booth

- Select the space to remove from the booking
- Use the "Remove Space" option (not full unbook)
- The space becomes available for other vendors
- Credits or adjustments are generated as needed

Modifying Rentals

Rental equipment can be adjusted after initial booking:

- **Add rentals:** Select the term and add new rental items
- **Remove rentals:** Remove items the vendor no longer needs
- **Change quantities:** Adjust the number of tables, chairs, etc.
- **Change pricing:** Apply discounts or correct pricing errors

How Adjustments Affect Invoices

The impact on invoices depends on the invoice status:

Invoice Status	Adjustment Behavior
Draft	Line items added/removed/modified directly on the invoice
Released (unpaid)	Adjustment invoice created for the difference
Paid	Adjustment invoice created for the difference

Adjustment Invoices for Paid Bookings

When you modify a term that has a paid invoice, the system creates an **adjustment invoice**:

- Positive adjustment: Vendor owes additional amount (added space/rentals)
- Negative adjustment: Vendor receives credit (removed items)
- Adjustment invoices reference the original invoice

- They follow the same release and payment workflow

Best Practice: Make all adjustments to draft invoices before releasing them. This avoids the complexity of multiple adjustment invoices.

Quick Reference

Term Type Comparison Table

Feature	Day	Week	Month	Events
# of Events	1	All in week	All in month	All events
Flexibility	Highest	High	Medium	Lowest
Typical Price	Highest/day	Moderate	Lower	Lowest/day
Debook Impact	1 day	Full week	Full month	All events
Convert To	N/A	Day	Day, Week	Day, Week, Month

Common Scenarios and Solutions

Scenario: Vendor needs to miss one day from a week term

- Convert the week term to day terms
- Unbook the specific day they're missing
- Adjustment invoice handles price difference

Scenario: Wrong vendor was assigned

- Unbook the incorrect assignment entirely
- Delete the draft invoice (if not released)
- Assign the correct vendor

Scenario: Vendor wants to upgrade from month to events

- Unbook the month terms
- Rebook with an events term
- Apply credits from unbooked months to new events invoice

Scenario: Need to add a table rental mid-way

- Edit the existing term to add the rental
- Specify start date for the rental
- Adjustment invoice generated for remaining dates

Troubleshooting Tips

Problem: Can't convert to a larger term type

Solution: Unbook the smaller terms and rebook with the larger term type. Upward conversion isn't supported because it might conflict with other vendors' bookings.

Problem: Debook removed more days than expected

This is expected behavior—debooking removes the entire term, not individual days. Rebook the days you want to keep with appropriate term types.

Problem: Invoice shows wrong price

For draft invoices, edit the line items directly. For released invoices, create a manual adjustment. Check that your market's fee configuration has the correct prices for each term type.

Problem: Vendor has overlapping terms

This shouldn't happen in normal use. Check if assignments were made with different term types. Convert or unbook conflicting terms to resolve.

Need more help? Contact Marketspread support for assistance with complex scheduling scenarios or unexpected behavior.