

- Simple Calendar Connect to a singular external calendar or sub-calendar with specified filtering to allow booking for an event or date range
- Round Robin This is a normal appointment where you can add the user(s) & a contact can book with one of the users based on availability or priority
- Class Booking Create a calendar for a set date or range to allow your contacts to attend a group meeting of some sort, you can even set a seat cap!
- Collective Allow for multiple users to be added to this calendar and the contact booking will be based on all of the user's availability combined, on top of the calendar settings

Name this calendar & give it a good description so contacts know what they are getting

What users from this appointment's group should ✓ be part of this service?

Set this calendar's availability, which means that the calendar will only allow booking during the set times & based on the users availability

Do you want to accept payments for the appointments booked on this calendar?

New Calendar	×		
Calendar name			
(eg) Outbound reach			
+ Add description		Give this service calendar a pa (If you don't like this oneyo	
Select team members		could put this appointment	
Please Select	~	calendar on a funnel page via t calendar element to brand it t	
Custom URL 🕟		you & customize the link!)	
/widget/bookings/ my-calendar o			
Meeting duration		How long is this appointment?	
30 Minutes	0		
Booking availability America/Chicago (UTC-05:00)	F S	Advanced Settings allows yo to further customize and edi your calendar	
08:00 AM (5) to (05:00)	РМ ©	Meeting details >	
To further customize your business hours, pleas	e navigate to the advanced	Availability	
settings.		Forms & payment	
Accept payments		Notifications & Additional Options	
Advanced settings	Cancel Confirm	Customizations	

Cheat Sheet



Add your own custom logo to ~ the widget

Edit this service calendar a path (tip.. put this calendar on a funnel page via the calendar element to brand it to you & customize the link!)

Which users from this appointment's group should be part of this service?

Meeting details

These are the details which will be shown in the calendar list page.

Calendar logo

Click to upload or drag and drop SVG, PNG, JPG or GIF (max. dimensions 180×180px | max. size 2.5mb)

Calendar name

New Calendar

Description

Write description

Group

Custom URL *

/widget/bookings/ example1

Meeting invite title {{contact.name}}

Appointment Distribution

Optimize for availability Optimize for equal distribution

Select team members
Stephanie Blair ×

Event color

Stephanie Blair

Edit this appointment calendar & give it a good description so contacts know what they are getting

Choose to round-robin booking based on availability & priority or keep it equally 50/50

Choose the color that this appointment will show up as when you view your appointments within the system

© 2023

Medium priority

zoom

Custom

.com/steph

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My availability Set your availabil	ity for the calendar here.		
Availability type		om 🔿	
Sun v Monday Tuesday	Mon Tue V 08:00 AM O To + Add time 08:00 AM O To	05:00 PM ③ G Copy to all	Edit this calendar's availability, which means that the calendar will only allow booking during the set times & based on the users availability
Wednesday	+ Add time 08:00 AM © Tc + Add time	Recurring meeting	
Thursday	08:00 AM () Tc + Add time	Repeat 📀	Times to repeat
Friday	08:00 AM () Tc + Add time	Daily ~ Every Day For 1 Time	1 - +
		If slots are unavailable? Skip booking unavailable slov	

If this appointment is only one of many, toggle on the recurring appointment option to set

- how often this appointment will repeat
- how many times this appointment will repeat
- how the software should behave if they're are no slots available for the upcoming appointments



How often do you want to offer this appointment?

How many appointments are you willing to have of this type each day?

Buffer time

Minutes

Meeting duration

How long is this appointment?

Date range 🕕

30

1

How many can be booked per time slot?

Meeting interval 🕠

Minimum scheduling notice

Maximum bookings per day 🕕

₃₀

Minutes

Days

Minutes

Days

+

Avoid someone booking too soon... for example, they must book 12+ hours

> How much time do you want between these appointments?

How far into the future → can someone book...

2, 3, 4 weeks?

Maximum bookings per slot (per user) \odot

Customize what questions are asked by connecting a form from the form builder. If sticky contact is not already on for your selected form, then you can choose to select it here if needed

Enable or disable the ability to allow the contact who is booking with you to add one or more guests

Enter your FB pixel ID to connect to ads

Forms

Set post-scheduling form preferences.

Select form 🕕

Default (First name, Last name, Email, Phone

Pre-populate fields (sticky contacts)

Add Guests 0

Confirmation page 🕕

Thank you message

Thank you for your appointment request. We will contact you shortly to confirm your request. Please call our office at {{contactMethod}} if you have any questions.

Facebook pixel ID (optional)

Pixel ID

Auto-confirm new calendar meetings

Control what the contact sees after they finish booking...like a specific thank you message or redirect to a specific URL... If you use a funnel page, you can also customize the redirect in that funnel specifically

Enable or disable autoconfirm, alternative is in a workflow or manually Enable or disable sending an automatic email notice to the user that the appointment is booked with, the contact that booked, and/or to a custom email address

Enable or disable Google/Outlook Calendar to send an appointment invitation to the contact

> Decide if you want to assign a user to the contact when booked

Notifications & Additional Options Configure notification and additional options

Select the type of notification

Acknowledgement email

Who should receive this notification?

	Contact	
_	Contact	

Assigned user

Emails

Allow Google calendar to send invitation or update emails to attendees.

Assign contacts to their respective calendar team members each time an appointment is booked

Decide if you want to assign a user to the contact when booked

Enable or disable the ability to reschedule or cancel

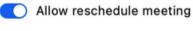
Customizations Set widget style and other preferences.

Calendar widget style Classic Neo Allow staff selection during booking Insert custom code Please Input

Choose the calendar look you prefer, Classic which is simpler or Neo which looks smoother

Enter any custom coding to edit or modify this appointment

Cancellation and reschedule:



Allow cancelling meeting

Additional notes

Phone:- {{contact.phone}} Email:- {{contact.email}}

Need to make a change to this event?

Customize the notes that appear in calendar event on the user & contacts google or outlook calendars