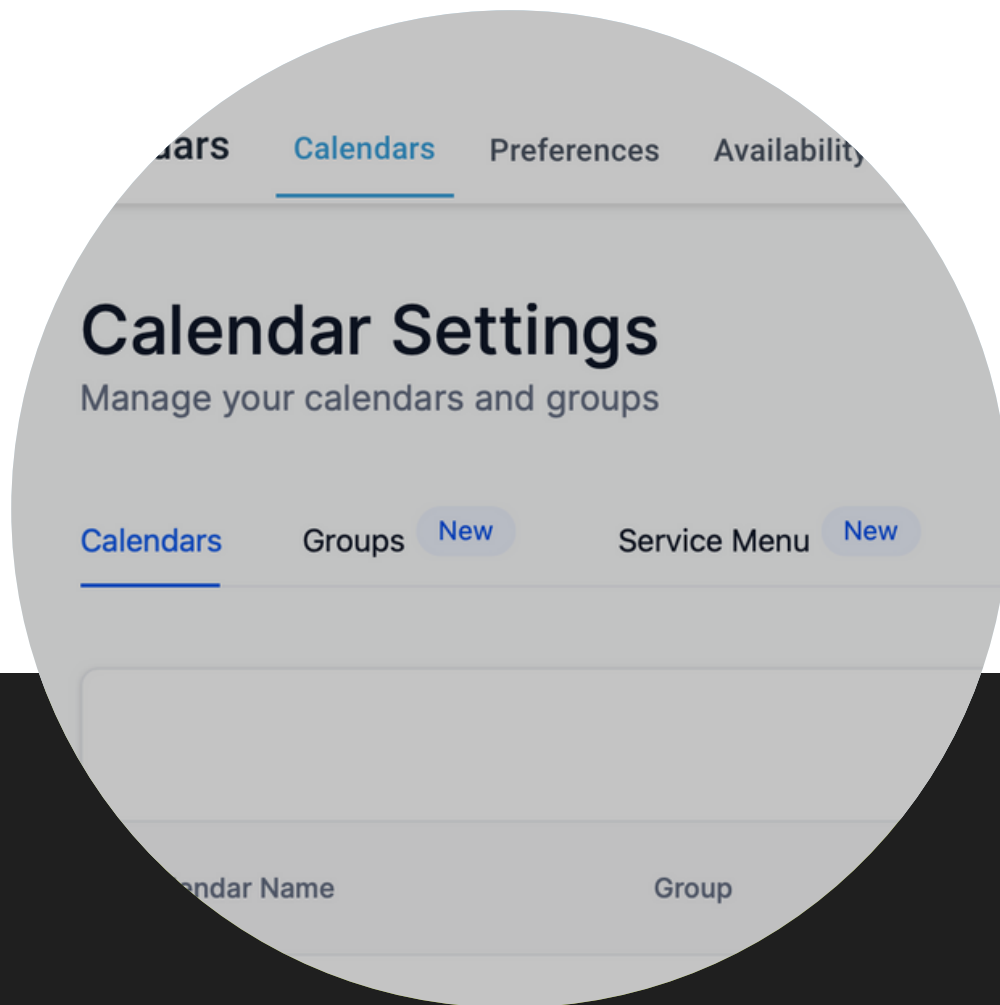


CALENDAR SETTINGS



SETTINGS

SIMPLE CALENDAR SETTINGS

New Calendar

Calendar name
(eg) Outbound reach

+ Add description

Select team members
Please Select

Custom URL ⓘ
/widget/bookings/ my-calendar

Meeting duration
30 Minutes

Booking availability
America/Chicago (UTC-05:00)

S M T W T F S

08:00 AM to 05:00 PM

To further customize your business hours, please navigate to the advanced settings.

Accept payments

[Advanced settings](#)

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

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

Give this service calendar a unique path (If you don't like this one...you could put this appointment calendar on a funnel page)

How long is this appointment?

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?

Meeting details >

Availability

Forms & payment

Notifications & Additional Options

Customizations

Advanced Settings allows you to further customize and edit your calendar

SETTINGS

ADVANCED CALENDAR SETTINGS

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 180x180px | 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
[Search box]

Medium priority Custom

zoom

Event color
[Color palette]

Callout boxes:

- Add your own custom logo to the widget
- Edit this appointment calendar name & give it a good description
- Which users from this appointment's group should be part of this service?
- Edit this service calendar a path
- Choose to round-robin 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

SETTINGS

ADVANCED CALENDAR SETTINGS

The screenshot displays the 'Advanced Calendar Settings' interface. At the top, there is a section for 'Availability type' with two options: 'Standard' (selected) and 'Custom'. Below this, a row of days is shown with checkboxes for 'Sun', 'Mon', 'Tue', 'Wed', 'Thu', 'Fri', and 'Sat'. The days from Monday to Friday are checked. For each day, there is a time range selector showing '08:00 AM' and '05:00 PM', with a 'Copy to all' button for Monday. Below the time range is a '+ Add time' link. At the bottom, there is a 'Recurring meeting' section with a toggle switch turned on. It includes a 'Repeat' dropdown menu set to 'Daily', a 'Times to repeat' input field set to '1', and a 'If slots are unavailable?' dropdown menu set to 'Skip booking unavailable slots'.

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

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

- how often to repeat
- how many times to will repeat
- how the software should behave if they're are no slots available

SETTINGS

ADVANCED CALENDAR SETTINGS

The screenshot shows a settings interface for a calendar. It is divided into two main sections. The top section includes: 'Meeting interval' (30, Minutes), 'Minimum scheduling notice' (empty, Days), 'Maximum bookings per day' (empty, with minus and plus buttons), and 'Buffer time' (empty, Minutes). The bottom section includes: 'Meeting duration' (30, Minutes), 'Date range' (empty, Days), and 'Maximum bookings per slot (per user)' (1, with minus and plus buttons). Eight callout boxes with arrows point to these fields, each containing a question about the setting's function.

How often do you want to offer this appointment? Ex. every 30 minutes

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

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

How much time do you want between these appointments?

How long is this appointment?

How far into the future can someone book...2, 3, 4 weeks?

How many can be booked per time slot?

SETTINGS

ADVANCED CALENDAR SETTINGS

Forms
Set post-scheduling form preferences.

Select form

Default (First name, Last name, Email, Phone

Pre-populate fields (sticky contacts)

Add Guests

Confirmation page

Default Redirect URL

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

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

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

Enter your FB pixel ID to connect to ads

Enable or disable auto-confirm, alternative is in a workflow or manually

SETTINGS

ADVANCED CALENDAR SETTINGS

Notifications & Additional Options
Configure notification and additional options

Select the type of notification
Acknowledgement email

Who should receive this notification?

- 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

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

SETTINGS

ADVANCED CALENDAR SETTINGS

Customizations

Set widget style and other preferences.

Calendar widget style
 Neo Classic

Allow staff selection during booking

Insert custom code

Please Input

Cancellation and reschedule:

Allow reschedule meeting

Allow cancelling meeting

Additional notes

Phone:- {{contact.phone}}

Email:- {{contact.email}}

Need to make a change to this event?

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

Decide if you want to the user booking to be able to choose which team member their appointment is with

Enter any custom coding to edit or modify this appointment

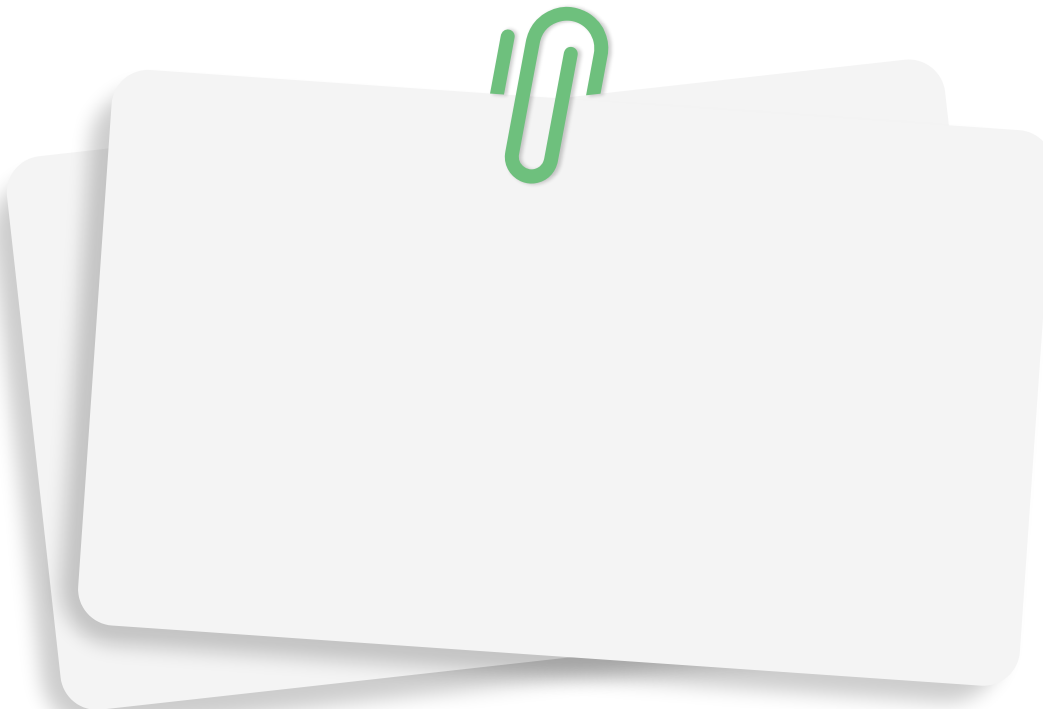
Enable or disable the ability to reschedule or cancel

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

NEED MORE HELP?

CHECKOUT OUR SUPPORT OPTIONS & RESOURCES

Our team is fully dedicated to supporting you every step of the way, ensuring your success. You can review the wide range of resources and support options available to guide you through any challenges or inquiries. Don't hesitate to reach out to our team whenever you need additional assistance; we're always here to help!



ALL INFORMATION IS SUBJECT TO CHANGE AS THE SOFTWARE UPDATES AND GROWS. NEW VERSIONS OF THIS WORKBOOK WILL BE EDITED FOR UPDATES AND NEW FEATURES.

