

CITK

Calendar User Consolidation



Booking appointments has now been made more interactive. There is now the option to select between the Classic widget type and the Neo widget type. You can choose the widget type when creating an appointment for a new calendar or editing an existing one. Users will also now be able to configure custom calendar URLs in the “Unassigned Calendar” type. This will allow users to add a custom calendar URL to their calendar appointment making it unique and relatable to their business name or related to the appointment itself. Moving Calendars to Groups, and Deactivating Groups are some additional releases with this feature.

Covered in this Article:

How to choose between different widgets on your calendar?

How to configure a custom Calendar URL for Unassigned Calendars?

Assigning Groups to other Calendar Types besides Group Calendars:

Picking Groups would be optional for all calendar types:

Ability to deactivate groups:

Changing the custom calendar URL won't affect meeting links

FAQ

Would the Calendar widget option be exclusive to the Unassigned Booking Calendar Type?

How do I enable the Widget Type feature?

Would it break my existing calendars if I decide to change the widget type?

What changes do I need to do at my end -after this release?

Can I add customize the calendar URL for the Unassigned calendar type?

I am unable to see the custom calendar URL in the calendar URL.

What happens when I update the custom calendar URL on an existing unassigned calendar?

Can I use special characters in the custom calendar URL?

Can I assign any existing group to a calendar?

Would there be a change in the custom calendar URL if I change the group of a calendar?

What is a Permanent Link and where can I use it?

Can I still assign a group to Round-Robin scheduling?

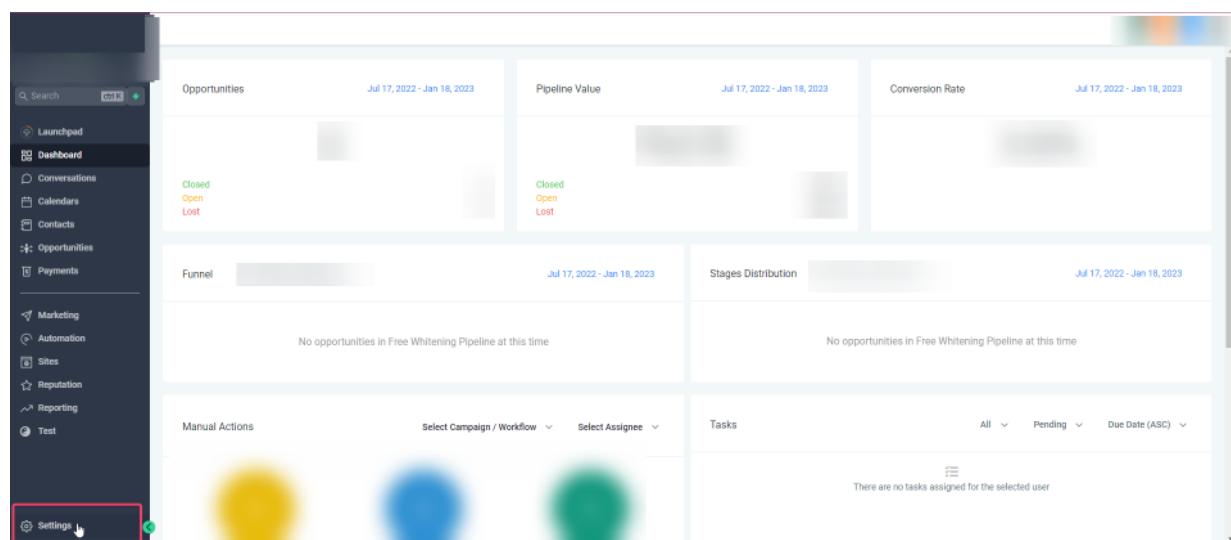
Can I remove a group from an existing Round Robin calendar?

What happens once I deactivate a group?

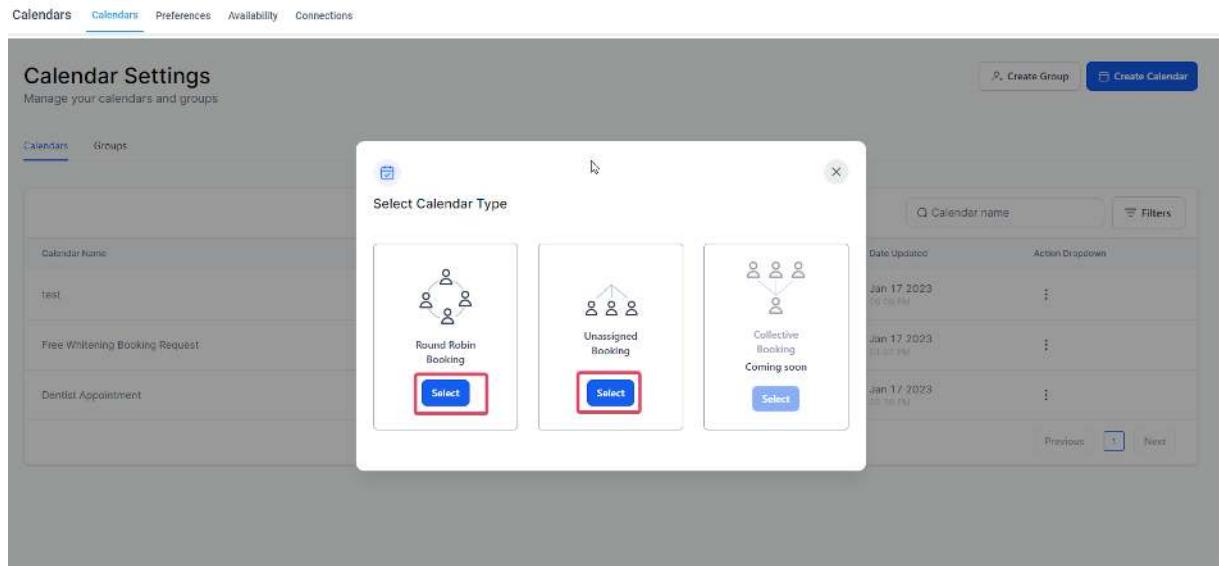
Can I assign a group back to a calendar if I have deactivated that group?

You can select between the Classic widget type and the Neo widget type. You can choose the widget type when creating an appointment for a new calendar or editing an existing one. You can make the changes by following these steps:

Navigate to **Settings > Calendars > Click on “Create Calendar”**



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Select Calendar Type, you can choose between any of the available types

Team & Event Setup ---> **Widget Type** is where you would see the following options to select from:

Classic (which was used for Unassigned)

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Add New Calendar

X

1 Team & Event Setup

2 Availability

3 Confirmation

Appointment Distribution

Determine how meetings from your calendar will be distributed amongst the team members (Round-robin scheduling)

Optimize for Availability

Optimize for Equal Distribution

+ Add User

Calendar

How would you describe your calendar?

Name

Add Calendar Name

Description

Add Calendar Description

Calendar URL

/widget/bookings/

Enter Calendar Slug

Widget Type

Neo

Classic

Neo

Appointment Title

{{contact.name}}

It will be used while creating appointment title, you can use template parameters.

Event Color



Close

Save & Continue

Neo (which will be used by default for Group Calendars)

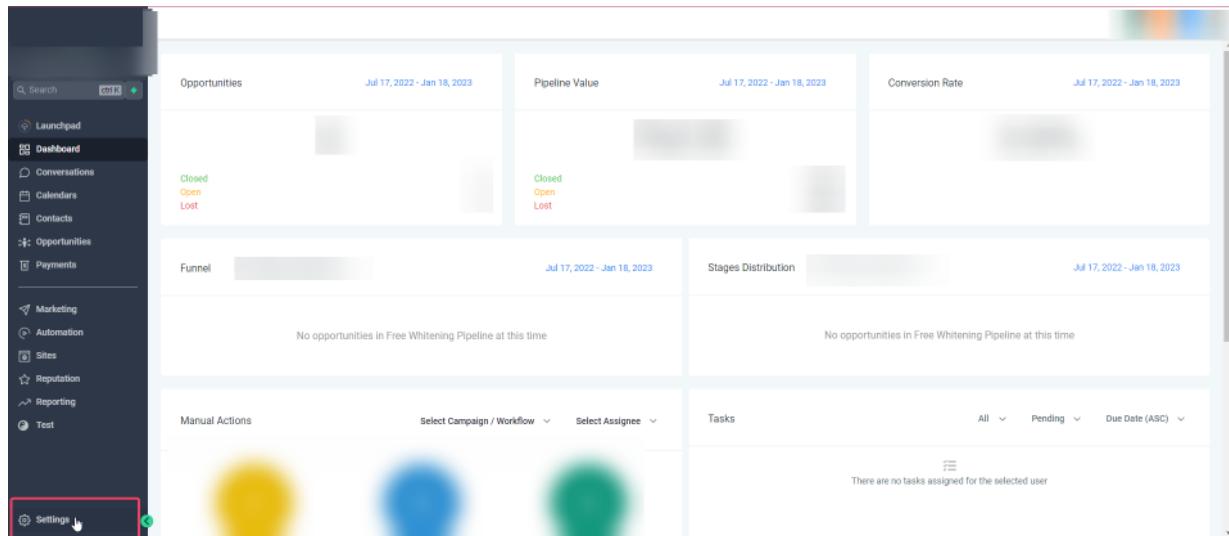
Please Note:

You can also edit an existing Calendar and change the widget type for it.

How to configure a custom Calendar URL for Unassigned Calendars?

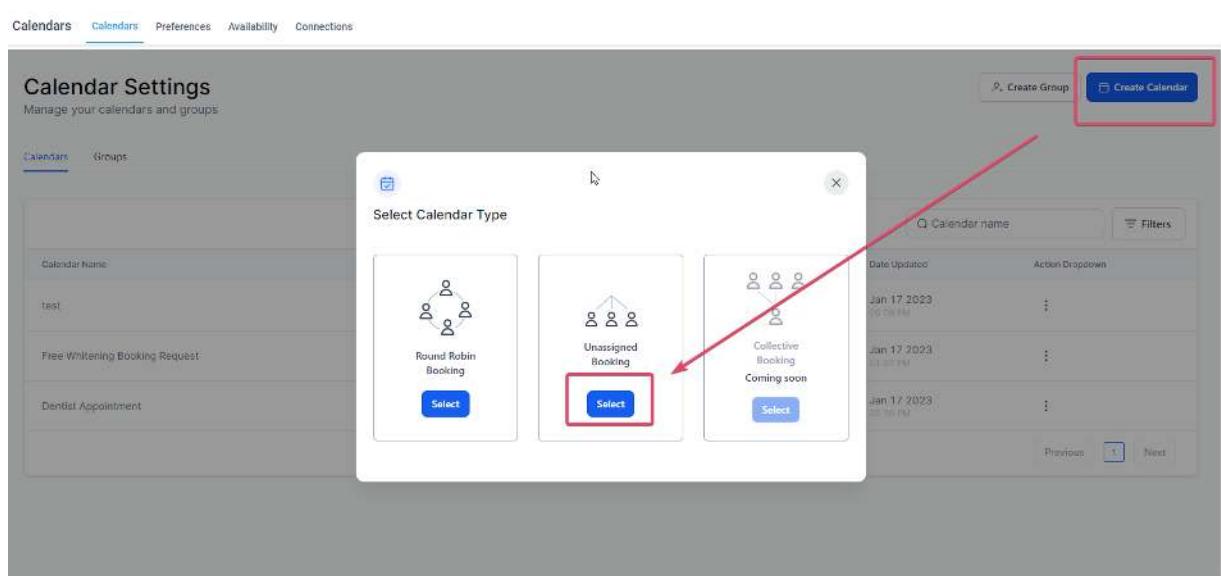
Navigate to **Settings > Calendars**

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A screenshot of a CRM dashboard. On the left is a sidebar with navigation links: Launchpad, Dashboard, Conversations, Calendars, Contacts, Opportunities, Payments, Marketing, Automation, Sites, Reputation, Reporting, and Test. A 'Settings' icon is highlighted with a red box. The main area contains several cards: 'Opportunities' (Closed: 1, Open: 1, Lost: 0), 'Pipeline Value' (Closed: 1, Open: 1, Lost: 0), 'Conversion Rate' (Jul 17, 2022 - Jan 18, 2023), 'Funnel' (No opportunities in Free Whitening Pipeline at this time), 'Stages Distribution' (No opportunities in Free Whitening Pipeline at this time), 'Manual Actions' (Select Campaign / Workflow, Select Assignee), and 'Tasks' (All, Pending, Due Date (ASC), There are no tasks assigned for the selected user).

Then click on **Create Calendar** > In the **Calendar Type**, select **Unassigned Booking**



A screenshot of the 'Calendar Settings' page. The 'Calendars' tab is selected. A 'Create Group' button and a 'Create Calendar' button are highlighted with red boxes. A red arrow points from the 'Create Calendar' button to the 'Select Calendar Type' dialog. The dialog shows three options: 'Round Robin Booking' (Select button), 'Unassigned Booking' (Select button, highlighted with a red box), and 'Collective Booking' (Coming soon, Select button). The background shows a list of existing calendars: 'test', 'Free Whitening Booking Request', and 'Dentist Appointment'.

In **Team & Event Setup**, you will see the text box in front of the **Calendar URL**

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1 Team & Event Setup 2 Availability 3 Confirmation

Calendar
How would you describe your calendar?

Name
test

Description
test

Calendar URL
/widget/bookings/ booking

Widget Type
Neo

Widget type is currently only supported for native calendar link. Support for widget in the funnel/website is coming soon.

Appointment Title
{{contact.name}}

It will be used while creating appointment title, you can use template parameters.

Meeting Location ?
Meeting Location

Event Color
Red, Pink, Orange, Yellow, Green, Dark Green, Blue, Purple, Dark Purple, Grey

Link to Calendar
Select linked calendar

Sync Option
One way

Close **Save**

Click on the textbox and type in the custom calendar URL you would want for the calendar link

Once you have typed in the custom URL, the system will run an availability check on the custom calendar url.URL

Calendar URL
/widget/bookings/ booking



Widget Type

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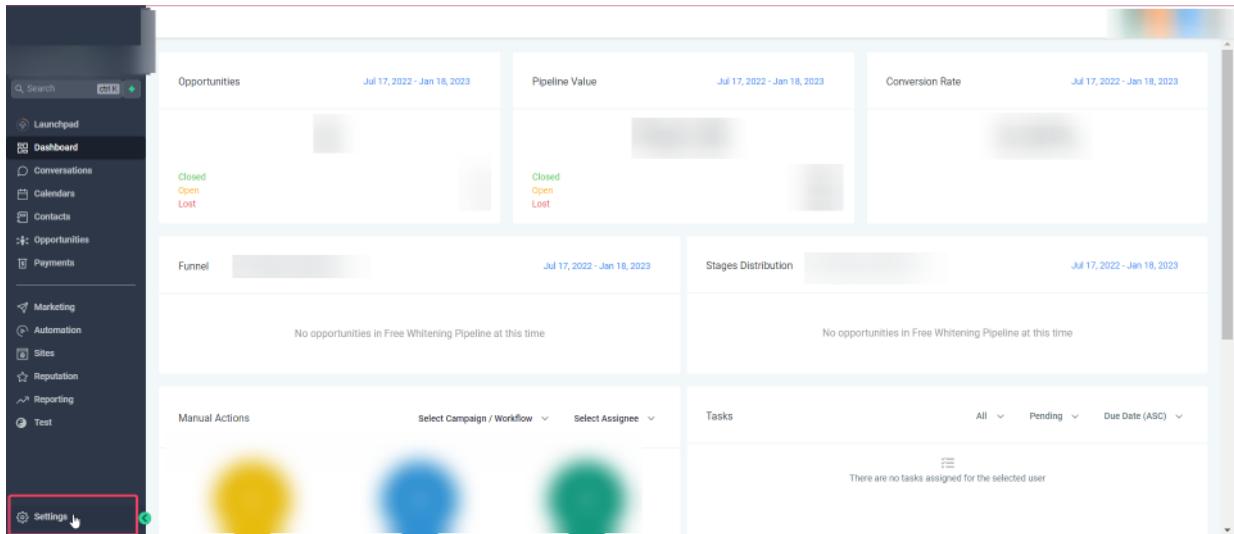
You can then see either a “check” indicating that it’s available for you and can save. In a few cases, you might see a “cross” which means that the custom calendar url is not available in that case you can tweak/modify your custom calendar URL to ensure it’s unique and you get it.URL



Then proceed to save the calendar and the Calendar URL would be saved as you configured it.

Assigning Groups to other Calendar Types besides Group Calendars:

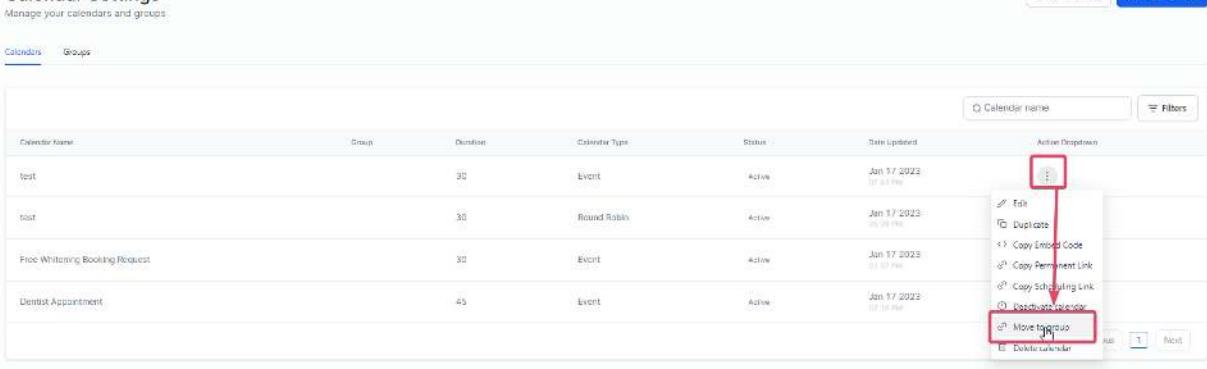
You can now assign Groups to the **Unassigned Calendar** type as well as other **Round-robin** Calendars



Go to **Settings > Calendars**:

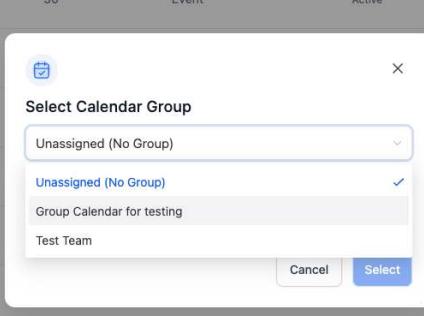
Click on the **3 dots** on the right side of the desired Calendar and then click on **Move to Group**:

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The screenshot shows the 'Calendars' section of the CITK interface. A list of calendars is displayed in a table with columns: Calendar Name, Group, Duration, Calendar Type, Status, Date Updated, and Action Dropdown. The 'Action Dropdown' column contains a menu with options like 'Edit', 'Duplicates', 'Copy Embed Code', 'Copy Permanent Link', 'Copy Embedding Link', 'Move to group' (which is highlighted with a red box), and 'Delete calendar'. A red arrow points from the text 'Move to group' to the 'Move to group' option in the menu.

It would open a pop-up where you would be asked to select a group you want to assign to the calendar and then Click on **Select**



The screenshot shows the 'Calendars' section with a 'Select Calendar Group' modal open. The modal lists groups: 'Unassigned (No Group)' (selected), 'Unassigned (No Group)', 'Group Calendar for testing', and 'Test Team'. It has 'Cancel' and 'Select' buttons. The main table lists various calendars with their details and a 'Group' column. A red box highlights the 'Group' column for the 'Only Chiru' calendar, which is associated with the 'Test Team' group. The bottom of the page shows navigation buttons for 'Previous', '1', '2', '3', '4', '5', and 'Next'.

Picking Groups would be optional for all calendar types:

You can create any calendar event without having to first select a group. For Round Robin or Unassigned

scheduling, you can simply click on the **Create Calendar** button which would then open options to

configure your calendars with ease.

Ability to deactivate groups:

You can deactivate a single group by clicking on the “**ellipses**” against the group which you wish to deactivate.

1. Clicking on the ellipses would open the **options** drawer
2. You can now see a new option “Deactivate all calendars in group”
3. Clicking on which would show a pop-up requesting confirmation

Changing the custom calendar URL won't affect meeting links

You can change a custom calendar URL for an existing meeting, without having to worry about updating the

appointment again. Changing the custom calendar URL would not affect the calendar URL and appointment

scheduling.

With this release, the Link formats for

`{{appointment.cancellation_link}}`

and

`{{appointment.reschedule_link}}`

will change for all Round Robin calendars. There would be no changes in the functioning of the links and will continue to work as it is (including in workflows).

Below is an example of the way these links would appear.

Cancellation Link Format: `/widget/cancel-booking?event_id=<event-id>`

`{{appointment.reschedule_link}}`

Reschedule Link Format format: `/widget/booking/<calendar-id>?event_id=<event-id>`

FAQ

Would the Calendar widget option be exclusive to the Unassigned Booking Calendar Type?

Answer: No, the option would be available in all the calendar types.

How do I enable the Widget Type feature?

Answer: All customers have access to the feature. Please contact your administrator or customer support if you don't see the option. Do try to [clear the browser cache](#) as well.

Would it break my existing calendars if I decide to change the widget type?

Answer: No, it should not break any calendar setup, if you choose to change the widget type in an existing calendar. However, please ensure you do a quick test for Calendars that are embedded in funnels.

What changes do I need to do at my end -after this release?

Answer: No changes are needed. The user has the option to configure either in the edit mode of the calendar configuration screen. But the important thing to note here is that all calendar types will switch over to Neo if they are put into Groups.

Can I add customize the calendar URL for the Unassigned calendar type?

Answer: Yes, you can add a custom calendar URL to all calendar types now

I am unable to see the custom calendar URL in the calendar URL.

Please ensure that the custom calendar URL you have entered is available. That would be shown by a Green Check on the right side of the free text box.

What happens when I update the custom calendar URL on an existing unassigned calendar?

Answer: The calendar link gets updated automatically with the new custom calendar URL (which can be accessed under Calendars > Copy Scheduling Link). However, the previous links will continue to function and can be accessed under Calendars > Copy Permanent Link.

Please Note:

If you are looking to embed the calendar in the funnels, we'd recommend the Permanent Link, so any changes made to the calendar URL in the future will not affect the links.

Can I use special characters in the custom calendar URL?

Answer: Yes, you can use a '/' '-' in the custom calendar URL

example:

Group Permanent link

/widget/group/FyUICj8ccladOTMd3Jt8

Group Custom link

/widget/groups/test-groupCalendar

Calendar Permanent link

/widget/booking/L3GXLhOuTkFD8fS3uOPA

Calendar Custom link

/widget/bookings/test-cal/calendar-1

Can I assign any existing group to a calendar?

Answer: Yes

Would there be a change in the custom calendar URL if I change the group of a calendar?

Answer: The calendar would not change, however, the legacy calendar URL would be updated with the new group's calendar URL

What is a Permanent Link and where can I use it?

Answer: A permanent link is something that would not change even when the calendar link is

changed. A permanent link would be ideal for embedding purposes, without having to worry about the

embeds not working when the calendar link is changed.

Can I still assign a group to Round-Robin scheduling?

Answer: Yes, you can still do that by visiting Calendar Settings > Calendars > Move to Group

Can I remove a group from an existing Round Robin calendar?

Answer: Yes, you can still do that by visiting Calendar Settings > Calendars > Move to Group >

Select Unassigned/ungrouped

What happens once I deactivate a group?

Answer: Once you have deactivated a group, the calendar links will no longer be active, and you will not be able

to book appointments from within the app for calendars that are a part of that group.

Can I assign a group back to a calendar if I have deactivated that group?

Answer: Yes, you can by selecting the calendar options and choosing the option "move to group"