

CTTK

How to use Collective Bookings in Calendars



How to use Collective Bookings in Calendars: CITK

Collective Booking is a feature that enables scheduling meetings involving multiple team members simultaneously. It integrates individual team members' availability into a shared calendar, allowing for unified scheduling. This feature facilitates seamless group interactions, perfect for collaborative endeavors like sales calls, technical support, or group interviews.

Please Note:

The Collective calendar does not yet support Zoom and Google Meet integrations.

Covered in this Article

What is this feature?

Usage Cases:

How does a Collective Booking work?

How to Create a Collective Booking Calendar

Primary Owner

How would the Notifications work?

Payments

FAQs

Question: How many team members can I add to a single collective booking calendar

Question: Would payments work in Collective booking?

How to use Collective Bookings in Calendars: CITK

Question: Can I use collective booking for virtual appointments?

Question: Can I remove a team member from an existing collective booking calendar?

Question: I have changed the primary owner of the collective booking calendar, but for the existing appointment, I still see the old primary owner; why?

Question: Is there a way I can change the Primary owner for an already-created appointment?

Question: Can I edit/reschedule a booked collective appointment?

What is this feature?

Collective bookings are a sophisticated and efficient approach to concurrently scheduling multiple participant meetings. This scheduling feature allows the synchronization of different team members' schedules to streamline the booking process. It essentially amalgamates the team members' calendars to provide a standard time slot that suits everyone, thus allowing for collective or group bookings.

This functionality is an invaluable asset in several contexts, such as setting up dynamic sales calls that involve an account executive and a sales development representative (SDR), organizing complex technical support calls that require both a customer support rep and an engineer, or conducting insightful interviews involving a recruiter and a hiring manager.

Setting up a collective booking calendar is straightforward. You navigate to Calendars → Calendar Settings, click "Create Calendar," and select "Collective Booking." You then fill in the necessary details like the calendar name, team members involved, a custom URL for the calendar, and a meeting location. Once these details are confirmed, your Collective Calendar is ready to go.

A unique aspect of collective Booking is the concept of a 'Primary Owner.' This individual leads the appointment, acts as the appointment owner, and is assigned contacts if contact assignment is enabled. The primary owner is typically the first team member added to the collective Booking, but they can be changed as needed for greater flexibility and efficient team management.

Notification-wise, all team members are alerted when a contact books an appointment. This process ensures that everyone on the team stays informed about each appointment, fostering effective communication and collaboration.

In addition to these features, collective Booking includes payment capabilities if enabled for the calendar. With this, users have to make the payment first, and only after the payment is confirmed does the appointment get booked. This system ensures a seamless, secure transaction process, making the collective booking experience smooth and convenient for both users and customers.

Usage Cases:

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Use Case	Slot Intervals	Slot Availability	User Availability
Interview Scheduling	The slot interval can be customized based on the duration of the interview.	Slots are only available when all the interviewers are free simultaneously.	The system checks the availability of all interviewers.
Team Meeting	The duration of the meeting determines the slot interval.	Slots are available when all team members are free.	The system checks the availability of all team members.
Sales Call	Slot intervals are customized to accommodate the length of the sales call.	Slots are available when all involved sales personnel are free.	The system considers the availability of all sales personnel.
Technical Support Call	Slot intervals can be set according to the estimated call duration.	Slots are available when both the customer support rep and engineer are free.	The system checks the availability of the customer support rep and the engineer.

Use Case	Slot Intervals	Slot Availability	User Availability
Project Management	The slot interval is based on the shortest available time slot among all project team members.	Slots become available when all project team members are available simultaneously.	The collective booking feature considers the availability of all project team members.
Meeting			
Education Session	The shortest slot available between multiple tutors determines the time slot intervals.	Slots become available when all tutors are free at the same time.	The availability of tutors is considered in the collective booking feature.
Medical Consultation	The slot intervals are based on the shortest available time between a doctor, nurse, and possibly other medical staff.	The slots are available when the doctor, nurse, and other involved medical staff are free simultaneously.	The collective booking feature considers the availability of all medical staff involved.

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Slot Intervals

Slot Availability

User Availability

C The time slot intervals are determined by the shortest available time slot among the sales rep, product rep, product specialist, and customer success manager. **S**lots available when the sales rep, product specialist, and customer success manager are free simultaneously. **T**he collective booking feature considers all team members' availability in client onboarding.

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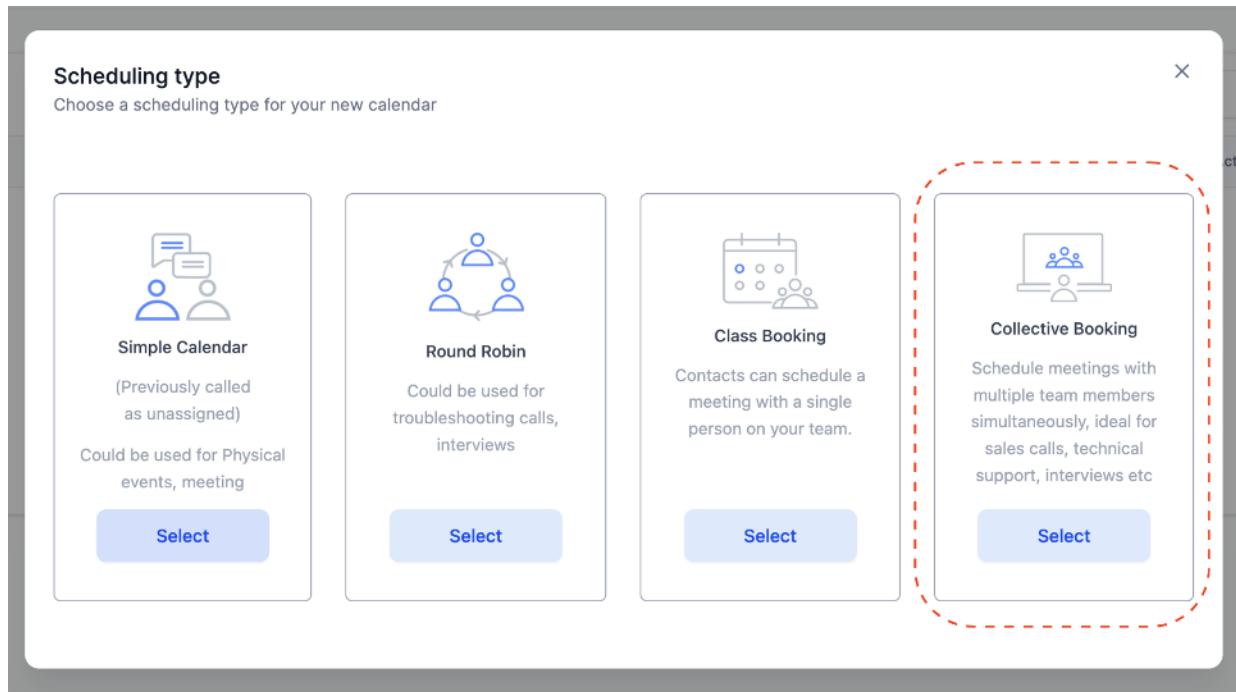
How does a Collective Booking work?

The Collective Booking calendar allows multiple users or team members to share a common calendar. When someone wants to schedule an appointment with the team members, they can see available time slots based on their combined availability in the collective booking calendar.

How to Create a Collective Booking Calendar

1. Go to Calendars → Calendar Settings
2. Click on "Create Calendar"
3. Select "Collective Booking"

How to use Collective Bookings in Calendars: CITK



1. Add the mandatory details for this calendar

1. **Calendar Name**
2. **Select Team members (A minimum of 2 team members are required for a Collective Calendar)**
3. **Custom URL**
4. **Meeting Location - This is not mandatory but recommended. If no meeting location is added, then the Custom Meeting location for the primary owner would be taken as default.**

2. You can click on "Confirm" and your Collective Calendar will be created.

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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

Asia/Calcutta (UTC+05:30)

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.

Meeting location ⓘ

Enter meeting location

Advanced settings

Cancel **Confirm**

3. To customize the Calendar Settings, you can either click on the "Go to advanced settings," or once the calendar creation is done, you can click on Edit calendar which would take you to the advanced settings.

Primary Owner

A primary owner in Collective booking would be that team member who would lead the appointment. The primary owner would also be the Appointment owner, and if the contact assignment is enabled then the contact would get assigned to the primary owner.

By default, the first team member added to the collective booking would be made the primary owner and the primary owner in the Collective booking cannot be deleted.

Change Primary Owner

To change the Primary owner

1. Go to Advanced Settings/Edit Calendar → Meeting Details
2. You would see the option "Make owner" against all the team members who are not currently Primary owner
3. Click on "Make owner" against the team member whom you want to make Primary Owner

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Meeting Details >

Availability

Forms & Payment

Notifications & Additional Options

Customizations

Custom Site

Meeting invite title *(i)*

test-collective-booking

Meeting location

89672561

Quick Tip

To include both the contact's name and the appointment user's name in the meeting title, use the following format:
{{contact.name}} X
{{appointment.user.name}}

Select Team member

Abhishek Chauhan X Jane Doe X John Doe X

AB Abhishek Chauhan

JA Jane Doe Make owner

JO John Doe Make owner

Event color *(i)*

Event color picker showing a row of color swatches, with the fourth one (blue) checked.

4. The owner would change as shown below and would be indicated with the "Owner" label next to them

Please Note:

A Primary owner cannot be deleted from the collective booking calendar. To delete a team member please ensure that the team member is not the Primary owner

How to use Collective Bookings in Calendars: CITK

Select Team member

AB Abhishek Chauhan

JA Jane Doe Owner

JO John Doe

Make owner Owner

Event color i

Color palette: Red, Pink, Orange, Yellow, Green, Blue (selected), Purple, Magenta, Grey

How would the Notifications work?

Only the assigned user will receive the email notification. However all the Users would receive a calendar invite notification from their third party integrated calendars (Google, Outlook, iCloud)

Payments

Payments would continue to work for Collective Booking if they are enabled for the Calendar, where the user would have to make the payment first, and once the payment is confirmed only then would the appointment be booked.

FAQs

Question: How many team members can I add to a single collective booking calendar

Answer: You can add upto 100 team members in a collective calendar, although please remember the more team members lesser the chances of finding available slots across all of them

Question: Would payments work in Collective booking?

Answer: Yes, payments would work for Collective Booking.

Question: Can I use collective booking for virtual appointments?

Answer: Collective booking can be used for virtual and physical appointments; please add the correct details in the Meeting location field.

Question: Can I remove a team member from an existing collective booking calendar?

Answer: You can remove any team member from the collective booking calendar except for the Primary owner. In case the team member you want to remove is a Primary owner, change the ownership from that user and then you would be able to remove the team member.

Question: I have changed the primary owner of the collective booking calendar, but for the existing appointment, I still see the old primary owner; why?

Answer: The details of the booked appointment would reflect based on the Calendar settings, which were there when the appointment was booked. Any appointment booked after the changes would start reflecting the changes.

Question: Is there a way I can change the Primary owner for an already-created appointment?

Answer: No, there is no way for users to change the details of an already booked collective appointment.

Question: Can I edit/reschedule a booked collective appointment?

How to use Collective Bookings in Calendars: CITK

Answer: Yes, you would be able to edit the details of the collective booking appointment. However, you could not change the team member details for the booked appointment.