

CITK

How to create a Round Robin calendar



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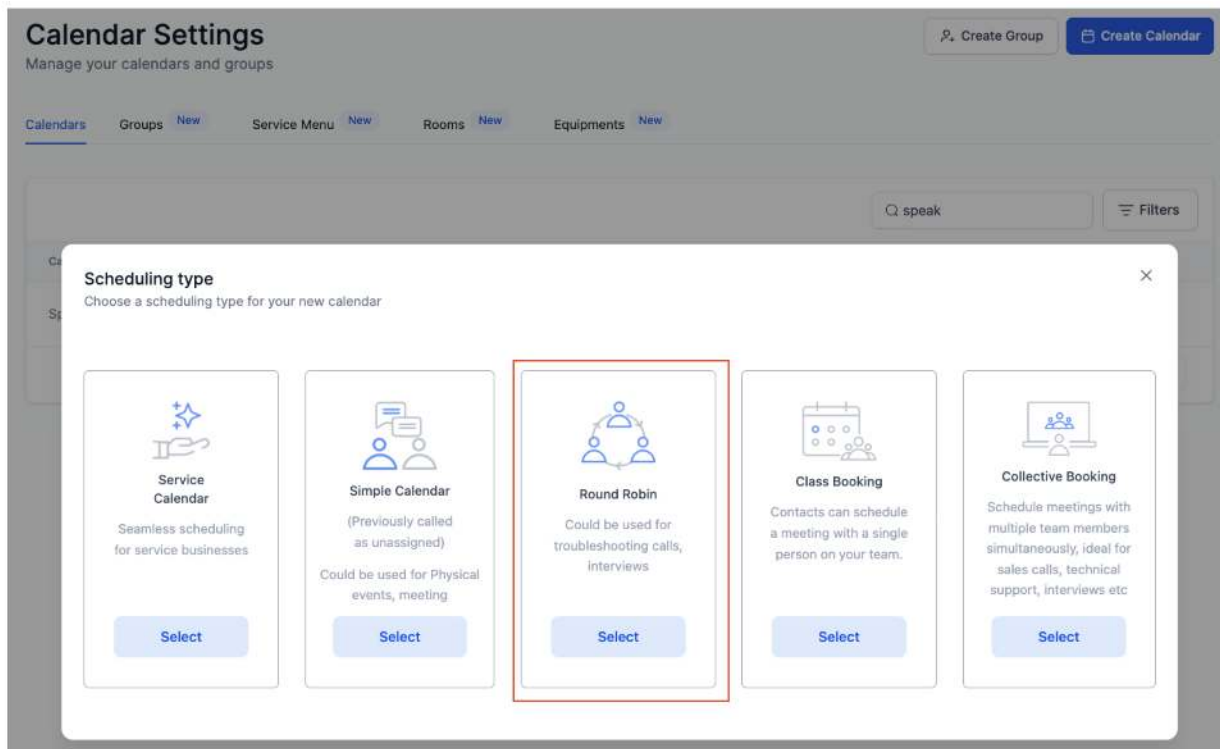
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Empower your team with Round Robin events, offering flexibility for invitees to choose a time with any available team member. Ideal for:

1. Linking leads with sales reps for intro calls and demos.
 2. Pairing new customers with the client services team for onboarding and training.
 3. Matching existing customers with a support team member.
 4. Pairing candidates with recruiters for phone screenings.
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Step 1: Setting up a Round Robin event:



To create a Round Robin event, click on the Create Calendar icon on the Calendar Settings page and select "Round Robin" option

Step 2: Adding Team Members

You can add multiple team members in the Round Robin calendars and distribute the appointments which would be scheduled amongst them using the distribution logic.

The screenshot shows the 'Meeting Details' configuration page for a Round Robin calendar. On the left is a sidebar with navigation links: 'Meeting Details' (active), 'Availability', 'Forms & Payment', 'Notifications & Additional Options', and 'Customizations'. Below these is a 'Quick Tip' section. The main content area contains several fields: 'Custom URL' with a value of '/widget/bookings/' and 'roundrobin-sb'; 'Meeting invite title' with a placeholder '{{contact.name}}'; and an 'Appointment Distribution' section. This section has two radio buttons: 'Optimize for availability' (unselected) and 'Optimize for equal distribution' (selected). Below this is a 'Select team members' section with a list of members: 'Swadha Bhoj' and 'Abhishek Chauhan'. Each member has a dropdown menu for selecting a meeting platform: 'Swadha Bhoj' is set to 'Google Meet' and 'Abhishek Chauhan' is set to 'Zoom'. At the bottom, there is an 'Event color' section with a row of color swatches, where the green swatch is selected with a checkmark.

Meeting Details

Availability

Forms & Payment

Notifications & Additional Options

Customizations

Quick Tip

To enable Gmeet functionality, make sure the team member's Google Calendar is set as their primary calendar in the settings.

Custom URL *

/widget/bookings/ roundrobin-sb

Meeting invite title

{{contact.name}}

Appointment Distribution

☐ Optimize for availability ☒ Optimize for equal distribution

Select team members

Swadha Bhoj × Abhishek Chauhan ×

Swadha Bhoj Google Meet

Abhishek Chauhan Zoom

Event color

Color selection: Red, Orange, Yellow, Green (selected), Blue, Purple, Grey.

Step 3: Distribution Logic

- **You can configure Round Robin automated meeting assignments in two ways:**

Optimize for availability

Optimize for equal distribution

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Custom URL *

/widget/bookings/roundrobin-sb

Meeting invite title ⓘ


{{contact.name}}

Appointment Distribution


☐ Optimize for availability ☒ Optimize for equal distribution


Select team members

Swadha Bhoj x Abhishek Chauhan x


 Swadha Bhoj

Google Meet



 Abhishek Chauhan

Zoom



Event color ⓘ