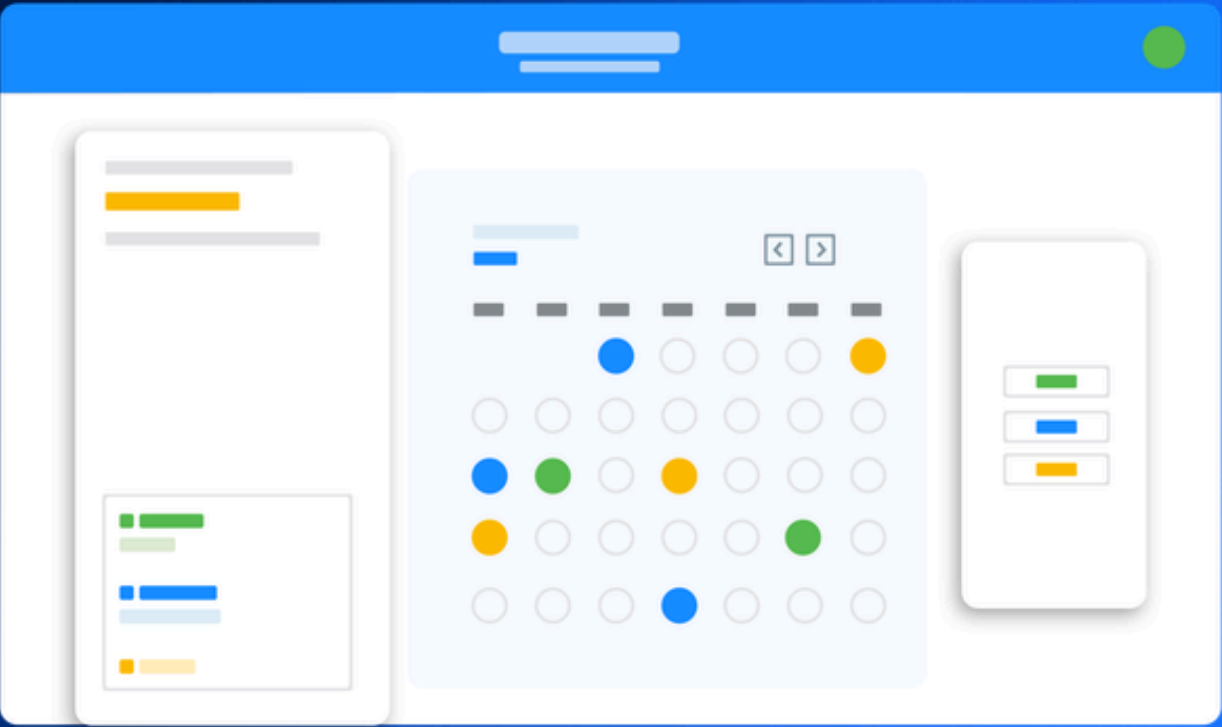


REFERENCE GUIDE

Calendars

Booking calendars from start to finish



Calendar View and Appointments

What It Is

The calendar view shows every booking on a day, week, or month grid. Appointment List shows the same bookings one per row, so you can search and find any customer fast.

How It Works For Your Business

- Search for Calendars, then use Calendar View, Appointment List, and Meeting Calendars.
- Switch between day, week, and month at the top of the Calendar View.
- Filter by users, calendars, and groups to see only the people you want.
- Hover over an appointment to see its type, title, and start and end times.
- Use Manage View to turn on options like showing buffer time.

Calendar View and Appointments – Tips & Guidelines

Tips

- Filter to just yourself when many people share the account.
- Use day view to see who is busy now and month view to see how full the future is.
- Look for the key that explains the small icons and colors.
- Use the Appointments list to answer, did my booking go through?

DO

- Use filters when you have a team
- Hover to peek before clicking
- Search the list for one customer
- Learn the color and icon key

DON'T

- Scroll a grid to find one person
- Ignore the filters
- Guess if a booking went through
- Skip Manage View

Calendar Types and Round Robin

What It Is

Your software offers five calendar types: Personal, Round Robin, Class Booking, Collective, and Service. The type decides who is booked and how many people can share a slot.

How It Works For Your Business

- Personal is one calendar for one person, and it is limited to a single assigned person.
- Round Robin rotates bookings across a team under one booking link.
- Class Booking lets many guests book the same slot, up to the seats you set.
- Collective only shows times when every added person is free.
- Service shows a menu of things to book, and its options can depend on your account features.

Calendar Types and Round Robin – Tips & Guidelines

Tips

- Pick the type at the start, since it shapes everything after.
- With Round Robin, look for settings for priority and for equal or availability based sharing.
- With Collective, adding more people means fewer open slots.
- Class calendars open on the current month, so mention that in your invite.

DO

- Match the type to your situation
- Start with the simplest type
- Test a booking to see who gets it
- Tell guests to click forward for later classes

DON'T

- Use Personal for a team
- Use Class Booking for one-on-one calls
- Build a Service menu first
- Assume you cannot build another later

Creating and Sharing a Calendar

What It Is

A new calendar starts as a short form on the Meeting Details tab: name, description, link, location, assigned person, and color. Share then gives you a link, embed code, or one-time link.

How It Works For Your Business

- Search for Calendars, open Meeting Calendars, click + Create Calendar, and choose a type.
- On Meeting Details, add a customer-friendly name, a rich text description, a short custom URL, and a location.
- Click Save, then use the three-dot menu on the new row to edit or choose Share.
- Copy the scheduling link, or copy the embed code into a custom code element or the calendar element.
- Use a one-time link for one person. It expires after one booking, and Generate New Link makes another.

Creating and Sharing a Calendar – Tips & Guidelines

Tips

- Write the name the way your customer would say it, and keep the URL short.
- Add two locations if you offer two ways to meet.
- Open your own link and read it like a stranger, then book a test.
- A Google organic booking option may appear on some accounts, so look for it.

DO

- Use customer words in the name
- Preview the live page
- Put the link in your email signature
- Use one-time links for VIPs

DON'T

- Use spaces in the custom URL
- Skip the live test
- Forward a one-time link widely
- Count on the Google option everywhere

Availability, Duration and Buffers

What It Is

The Availability tab controls when people can book and how the slots look. It holds weekly hours, date-specific hours, duration, interval, buffers, and booking limits.

How It Works For Your Business

- Set weekly hours with Edit, use Copy to repeat a day, and click Save.
- Add date-specific hours for chosen dates. They always override the weekly hours.
- Duration is how long an appointment lasts, and slot interval is how often a start time appears.
- Pre and post buffers block time before and after each appointment.
- Set appointments per slot, appointments per day, minimum scheduling notice, and the date range.

Availability, Duration and Buffers – Tips & Guidelines

Tips

- When extending a day, enter the full range, such as 9 to 8.
- Keep appointments per slot at one for one-on-one calls.
- Turn on show buffer time in Manage View to see buffers on the grid.
- Refresh your booking link after every change to check the slots.

DO

- Set weekly hours first
- Use date-specific hours for one-offs
- Add a minimum notice
- Refresh the widget to confirm

DON'T

- Change your week for one odd day
- Confuse duration with interval
- Leave limits blank by accident
- Trust the widget without refreshing

Widget Look, Forms and Payments

What It Is

The booking widget can match your style and collect more than a time. You can choose a widget style, change colors and text, add a form, ask for consent, and take payments.

How It Works For Your Business

- In Preferences, choose a widget style such as Classic or Neo.
- Use the calendar's Customizations tab for primary color, background color, and button text.
- Use toggles to hide the name, description, duration, or timezone, and use Preview or Reset to default.
- Use Calendar Widget Reorder to change the order of the booking steps.
- On the Forms & Payments tab, choose the default or a custom form, a consent checkbox, guest add-on, and payment settings.

Widget Look, Forms and Payments – Tips & Guidelines

Tips

- Preview changes before you save them.
- A custom form comes from your Forms area, so build it first.
- Payment settings include the amount, currency, description, and options like deposits and coupons.
- Check the live widget after every change.

DO

- Preview before saving
- Build the custom form first
- Keep the form short
- Check the widget on a phone

DON'T

- Hide details customers need
- Ask for too much information
- Skip the live check
- Change colors and lose contrast

Appointment Notifications

What It Is

The Notifications tab controls the messages sent about a booking. You choose when each message goes out, who gets it, and which channel carries it.

How It Works For Your Business

- Message types include Booked (Unconfirmed), Booked (Confirmed), Cancellation, Reschedule, Reminder, and Follow-Up.
- Recipients can include the contact, the assigned user, guests, and extra emails or numbers.
- Channels include Email, In-App, SMS, and WhatsApp.
- Pick a template, use custom values to fill in names and times, and set a subject line.
- Set reminder and follow-up timing, and review the cancellation and reschedule policy on the widget.

Appointment Notifications – Tips & Guidelines

Tips

- Read each message as the customer will see it.
- Use custom values so each message feels personal.
- Choose reminder timing that fits how far ahead people book.
- Some channels need extra setup in your account.

DO

- Turn on a reminder
- Use a clear subject line
- Test with your own booking
- Review the cancel policy

DON'T

- Send every type to everyone
- Forget to check the template
- Use SMS without setup
- Set reminders too close to the call

Managing and Rescheduling Bookings

What It Is

Once people book, you manage each appointment from Calendar View or Appointment List. You can edit, reschedule, cancel, change status, add notes, and book for a contact.

How It Works For Your Business

- Click an appointment in the Calendar View to open it and edit, reschedule, cancel, or change status.
- Statuses include Confirmed, Showed, No Show, Cancelled, and Invalid.
- In Appointment List, use Upcoming, Cancelled, and All, plus filters for status, user, calendar, date, and contact.
- Change a status right in the list, use the three-dot row menu, and save a smart list.
- Book an appointment by hand for a contact, and set up recurring appointments when needed.

Managing and Rescheduling Bookings – Tips & Guidelines

Tips

- Add appointment notes so the next person has context.
- Keep statuses current so your counts stay true.
- Use a saved smart list for views you open every day.
- Open the form submission in the side drawer to see what the person entered.

DO

- Update the status after each call
- Add a short note
- Save filters you reuse
- Use manual booking for phone requests

DON'T

- Leave statuses blank
- Cancel when you mean reschedule
- Rebuild filters every day
- Delete notes others need

Connecting Outside Calendars

What It Is

Connections link your calendar to Google, Outlook, iCloud, Zoom, or Teams. Two-way sync keeps outside events from clashing with bookings and adds video links.

How It Works For Your Business

- Search for Calendars, open Connections, and click + Add New.
- Connect Google and accept all the permissions it asks for.
- Choose a linked calendar for new bookings and conflict calendars to check for busy times.
- Connect Outlook or iCloud the same way, and connect Zoom or Teams to use it as a meeting location.
- Use Hide Third-Party Calendar Details if you do not want outside event details shown.

Connecting Outside Calendars – Tips & Guidelines

Tips

- Accept every permission, or syncing may fail.
- Pick conflict calendars carefully so real busy times block slots.
- Watch for the disconnection notification.
- Re-connect a broken Google link from Connections.

DO

- Accept all permissions
- Choose conflict calendars on purpose
- Test with a sample event
- Reconnect when notified

DON'T

- Click past permission screens
- Connect the wrong account
- Ignore a disconnect notice
- Forget to pick a linked calendar

Groups, Preferences, Troubleshooting

What It Is

Groups bundle calendars under one link. Preferences hold account-wide options. A built-in troubleshooting tool and a checklist help you find why time slots are missing.

How It Works For Your Business

- Search for Calendars, open Groups, and click Create Group.
- Give the group a name and slug, pick a Classic or Neo template, and add calendars.
- Share the group booking link, and deactivate a group when you no longer need it.
- In Preferences, set the account timezone, default widget style, and in-app view options.
- Use the Troubleshooting Tool and the missing time slots checklist to find the cause.

Tips

- Check timezone first when times look wrong.
- Review user permissions in Calendars so people see only what they should.
- The Look Busy setting can make your calendar appear more booked.
- Run the Troubleshooting Tool on the calendar that shows no slots.

DO

- Check timezone settings
- Review user permissions
- Run the Troubleshooting Tool
- Name groups clearly

DON'T

- Delete a group by mistake
- Guess why slots vanished
- Give everyone full access
- Skip the checklist

Key Terms Glossary

Calendar View

The grid of bookings by day, week, or month.

Appointments

The list of every booking, one per row.

Meeting Calendars

The Calendars area with your calendars and groups.

Round Robin

A team calendar that rotates bookings in turn.

Collective

A team calendar showing only times when everyone is free.

Class Booking

A calendar where many guests share one slot.

Slot interval

How often a new start time appears.

Buffer

Blocked time before or after an appointment.

Date-specific hours

Hours for chosen dates that override weekly hours.

Embed code

Code that shows your booking widget on your page.

One-time link

A booking link that expires after one booking.

Smart list

A saved set of filters you can reopen quickly.

Getting Help

Your software changes over time, so a button or tab may look a little different from what you see here. If something does not match, check the in-app help for Calendars or look for the option with the closest name.