HOW TO USE
CALENDLY

VASTAFFER

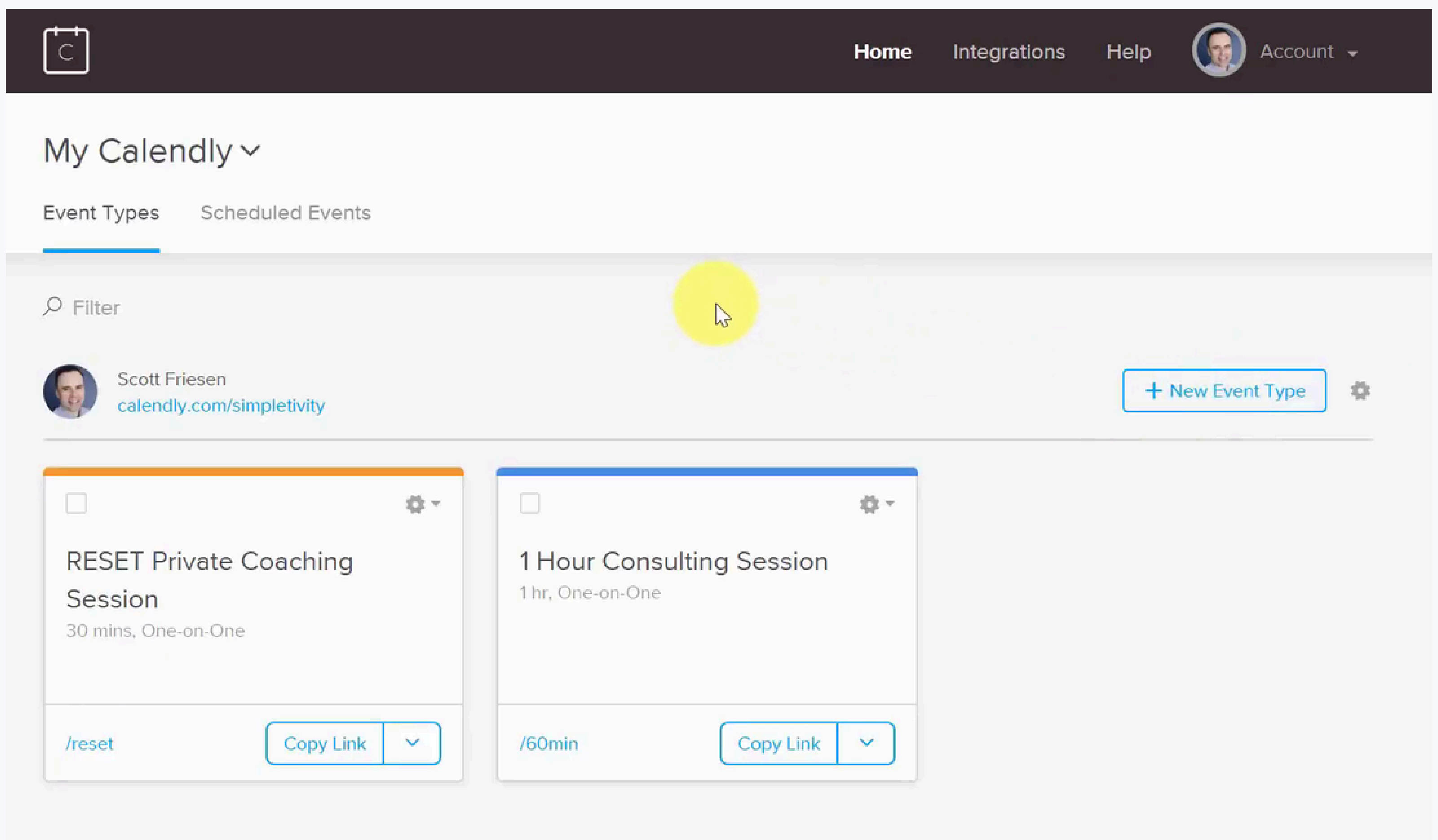
This documentation will show you everything you need to know about Calendly.

Basic Description of the Tool

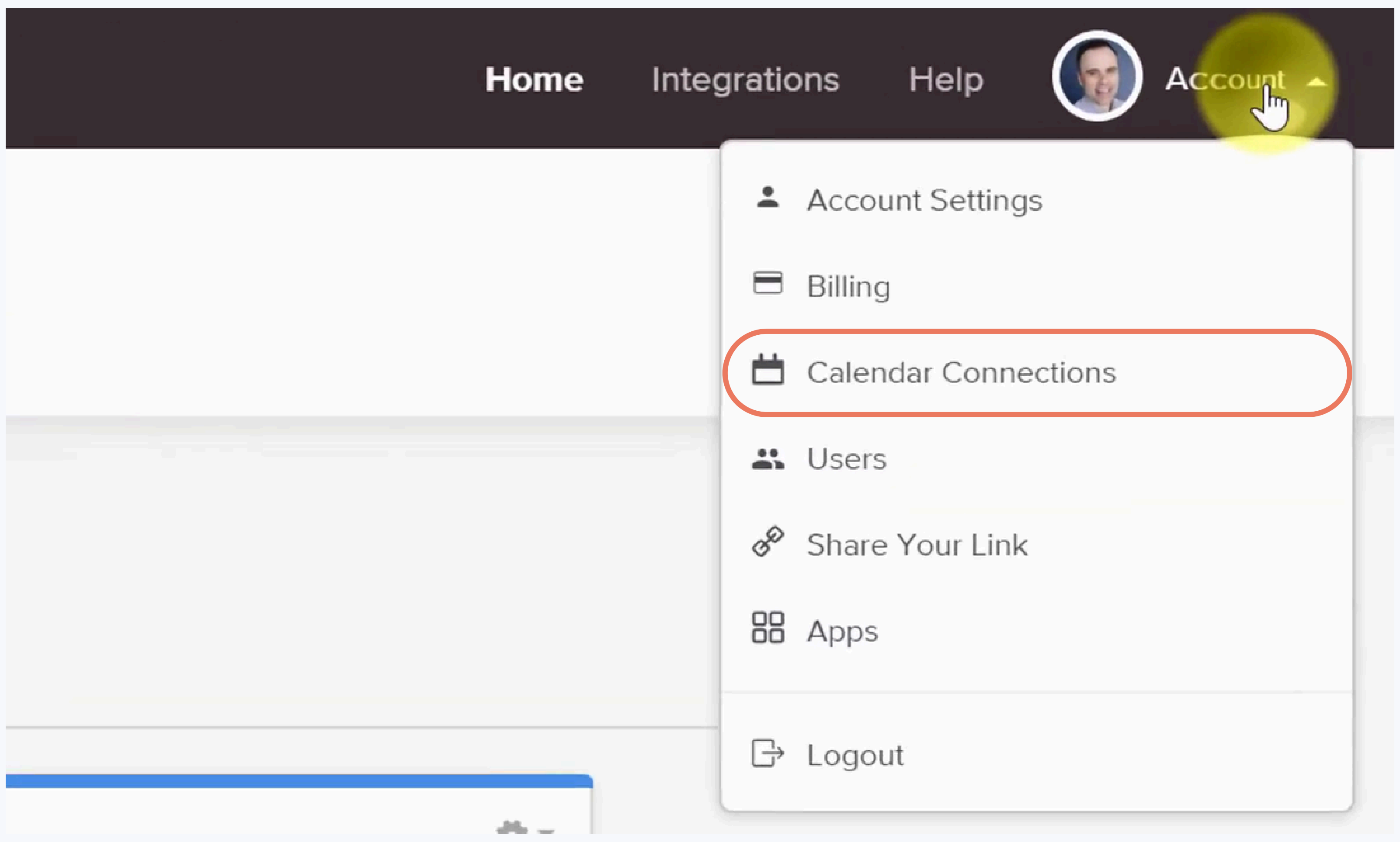
Calendly is a cloud-based scheduling tool that simplifies the process of scheduling meetings and appointments. It allows users to create a personalized calendar link and share it with others, enabling them to book appointments and meetings based on the user's availability. Calendly can integrate with other popular calendar and productivity tools, making it a convenient option for scheduling and managing appointments.

Here is a walkthrough to get started with Calendly:

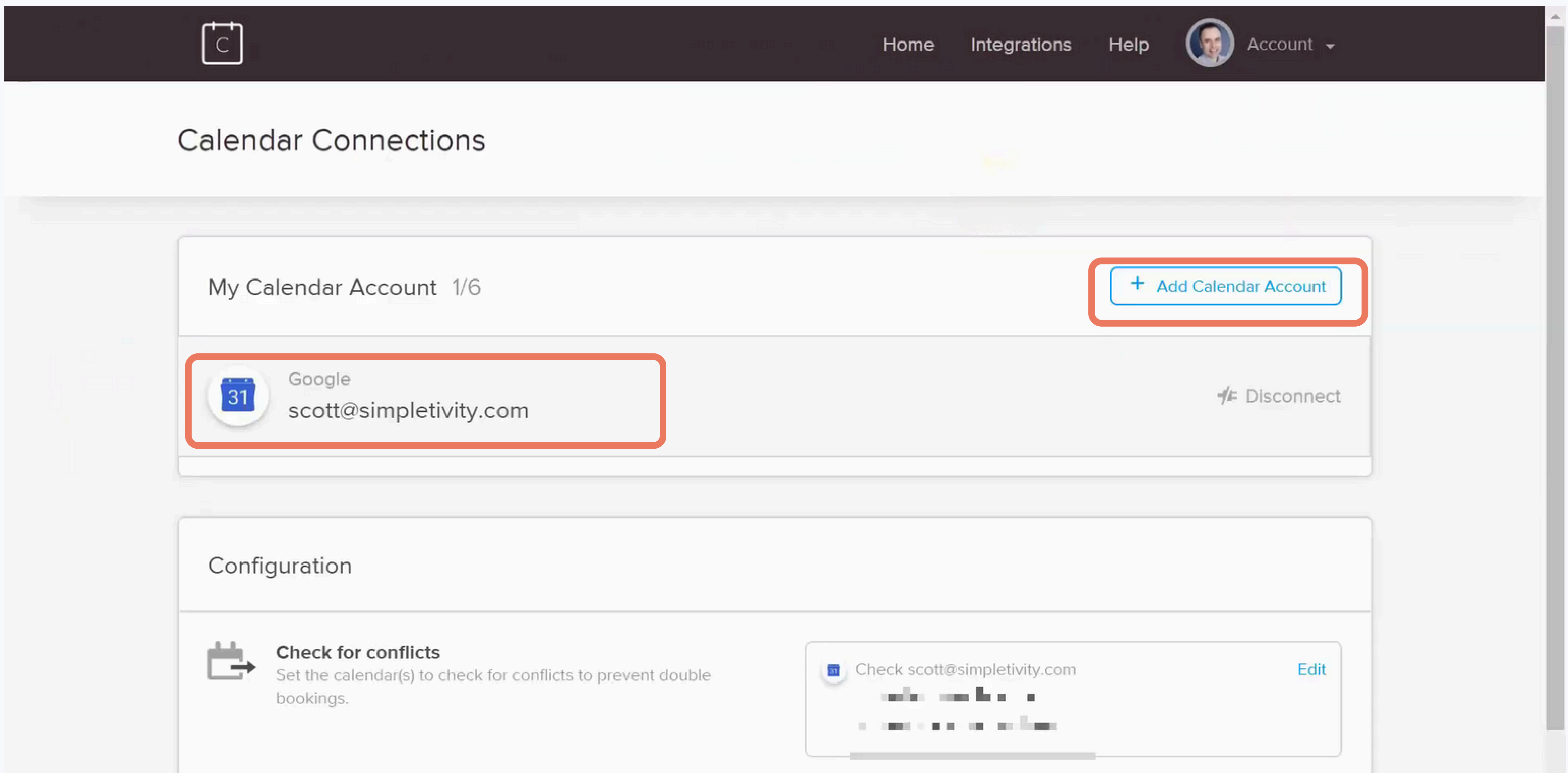
01 Once you've signed up with Calendly, you'll see the home screen.



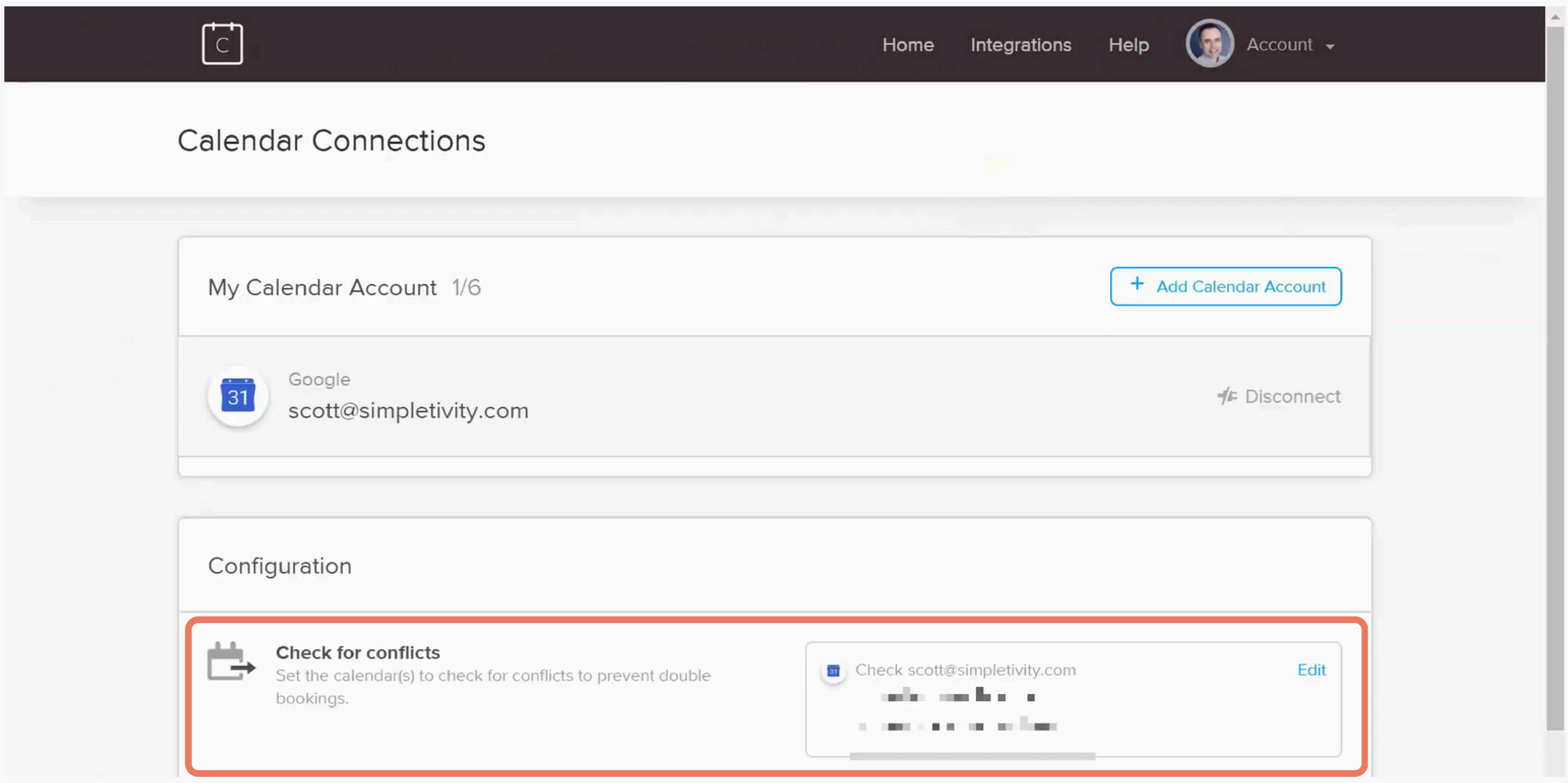
02 Click on 'Account' found on the top right of the dashboard, then click on 'Calendar Connections'.



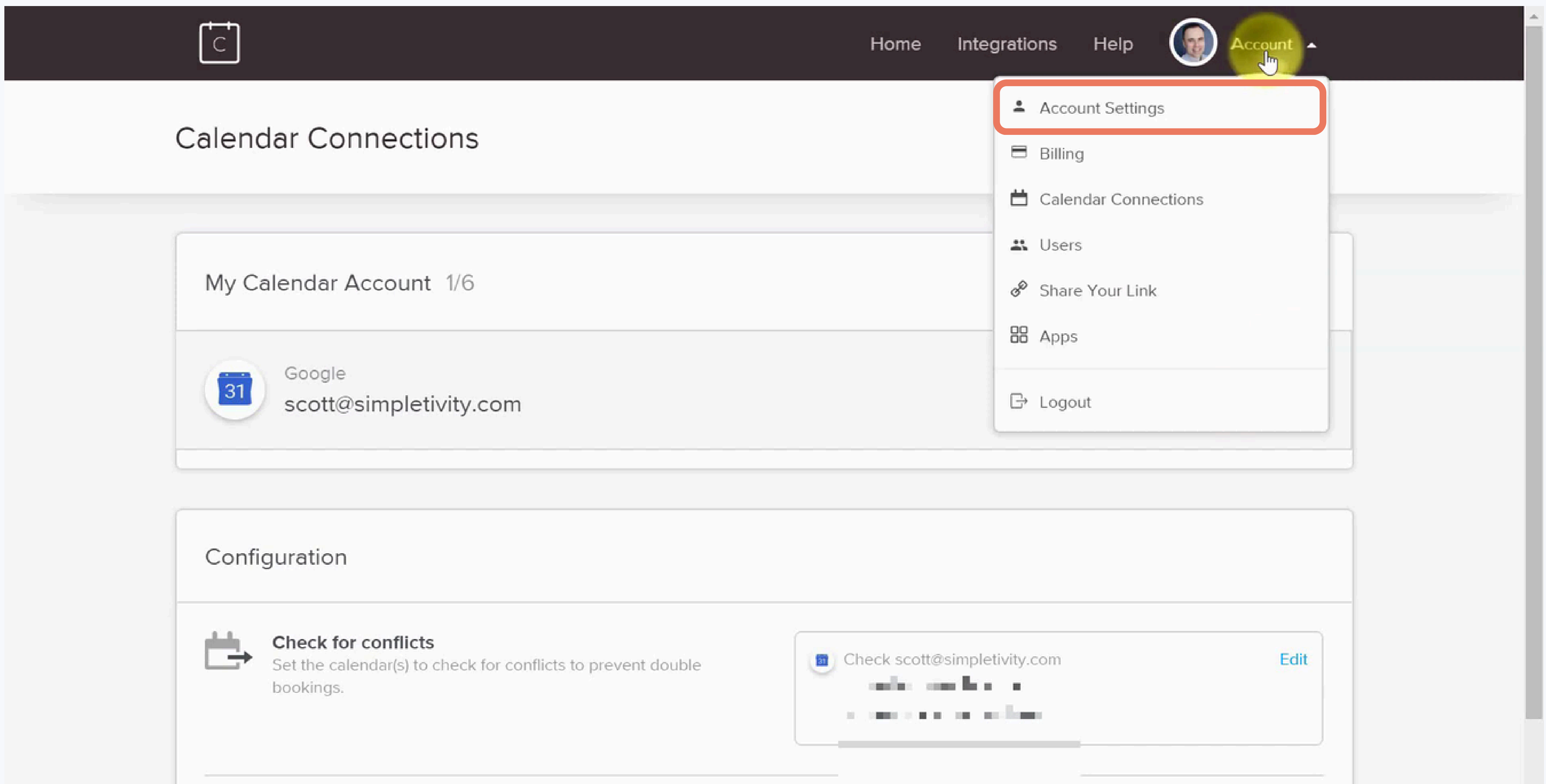
03 Make sure that you add one or more calendar accounts. This not only allows Calendly to book those appointments directly to your calendar, but it also allows Calendly to check other bookings that you may have going on.



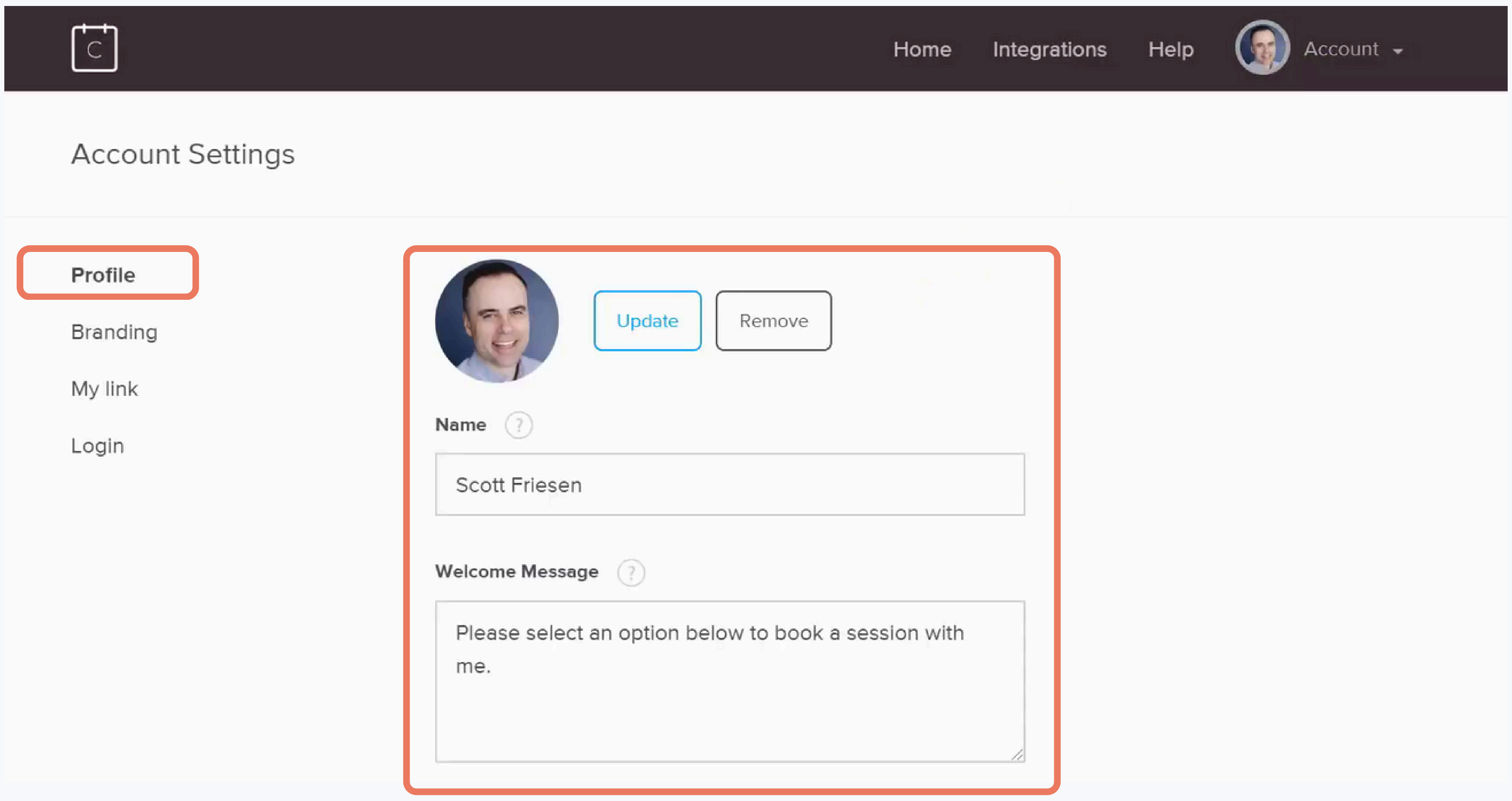
04 In the Configuration section, you'll see 'Check for conflicts'. It helps users avoid scheduling conflicts when creating new events. You can use multiple calendars to check for conflicts more than just one that you have selected. And, you can also specify which calendar to add those appointments to.



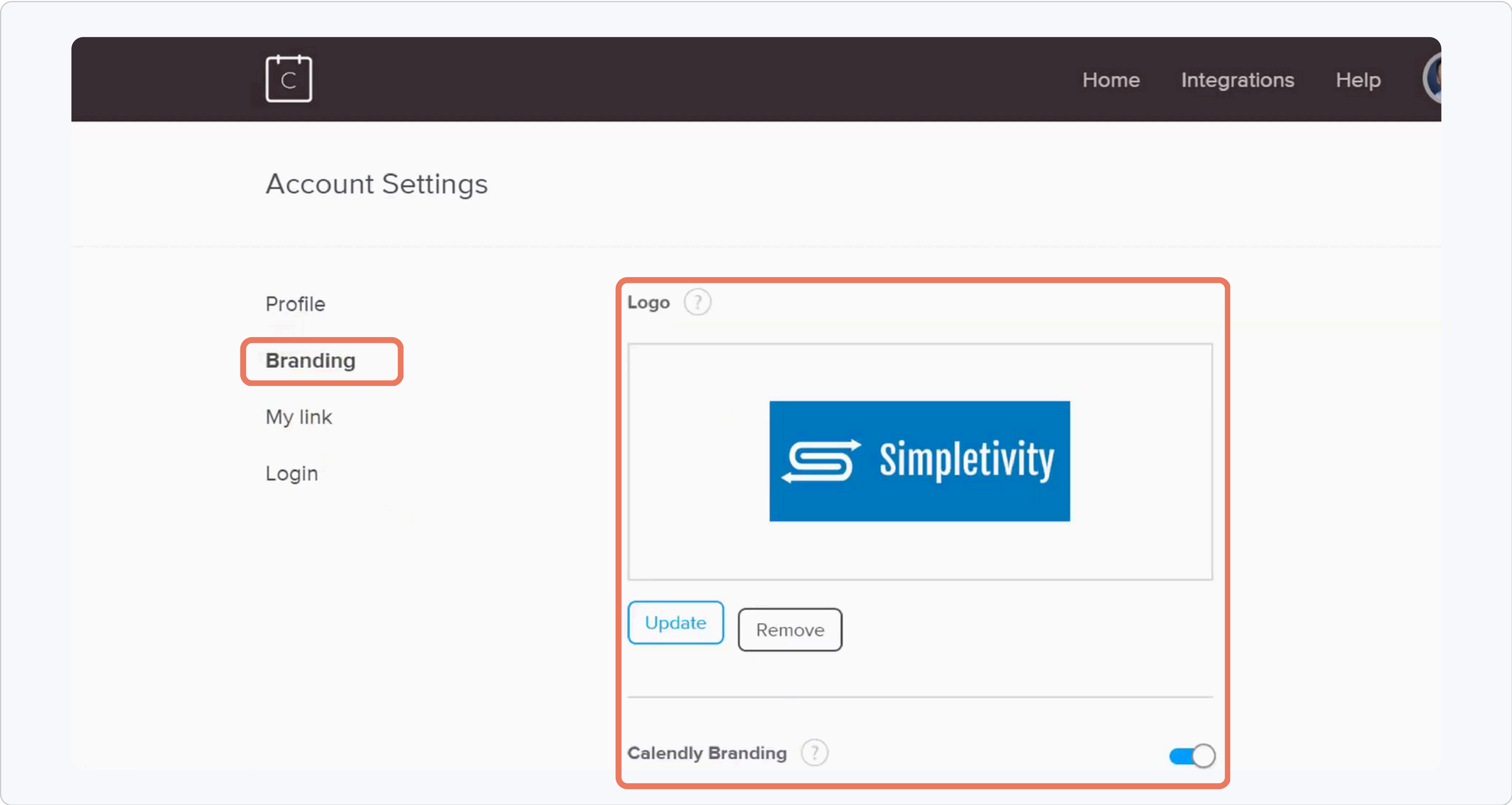
05 Now, navigate to the top right corner of the dashboard, click on 'Account' then click on 'Account Settings'.



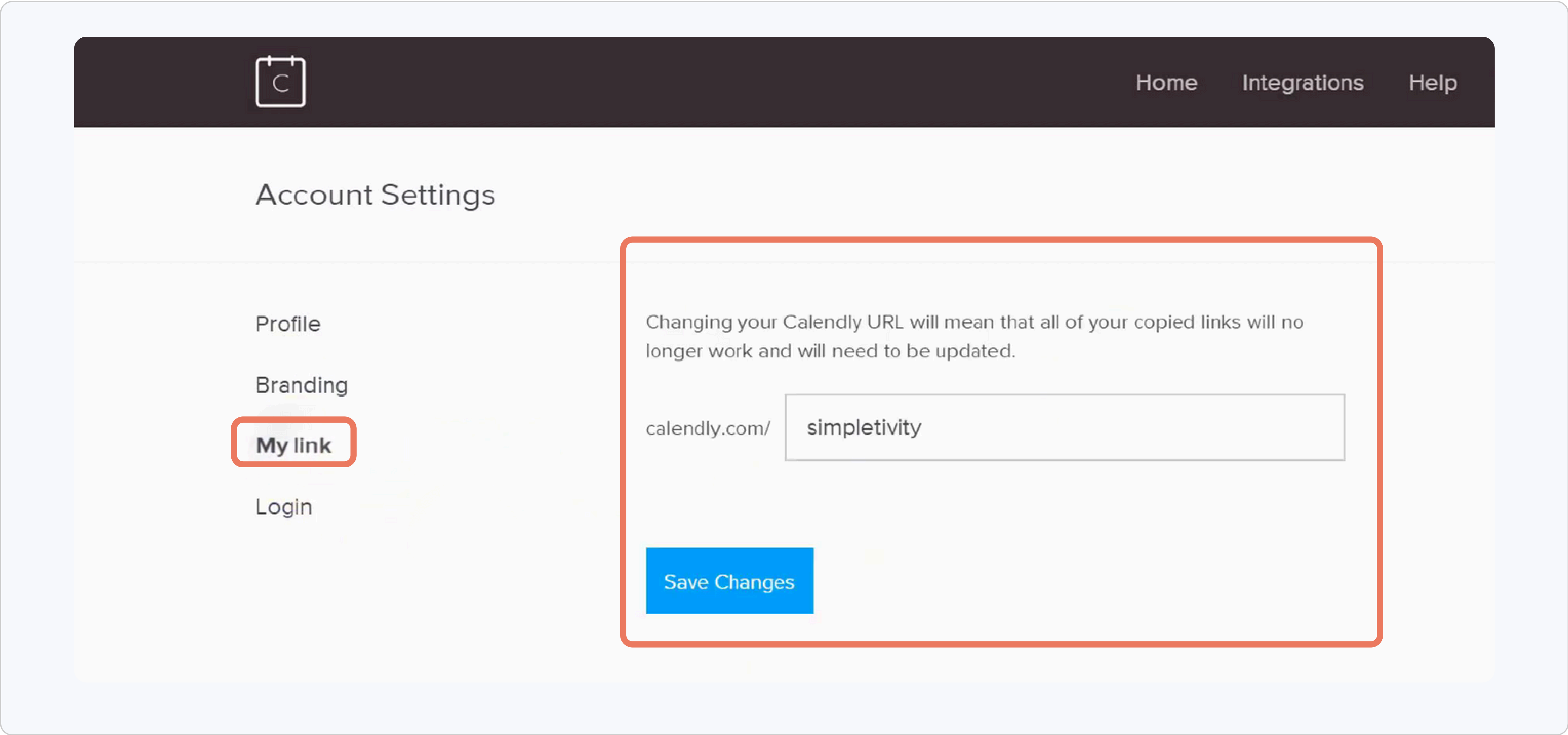
06 First, in the 'Profile' page, it is recommended that you upload an image. Put a nice profile picture of yourself along with your name and a welcome message.



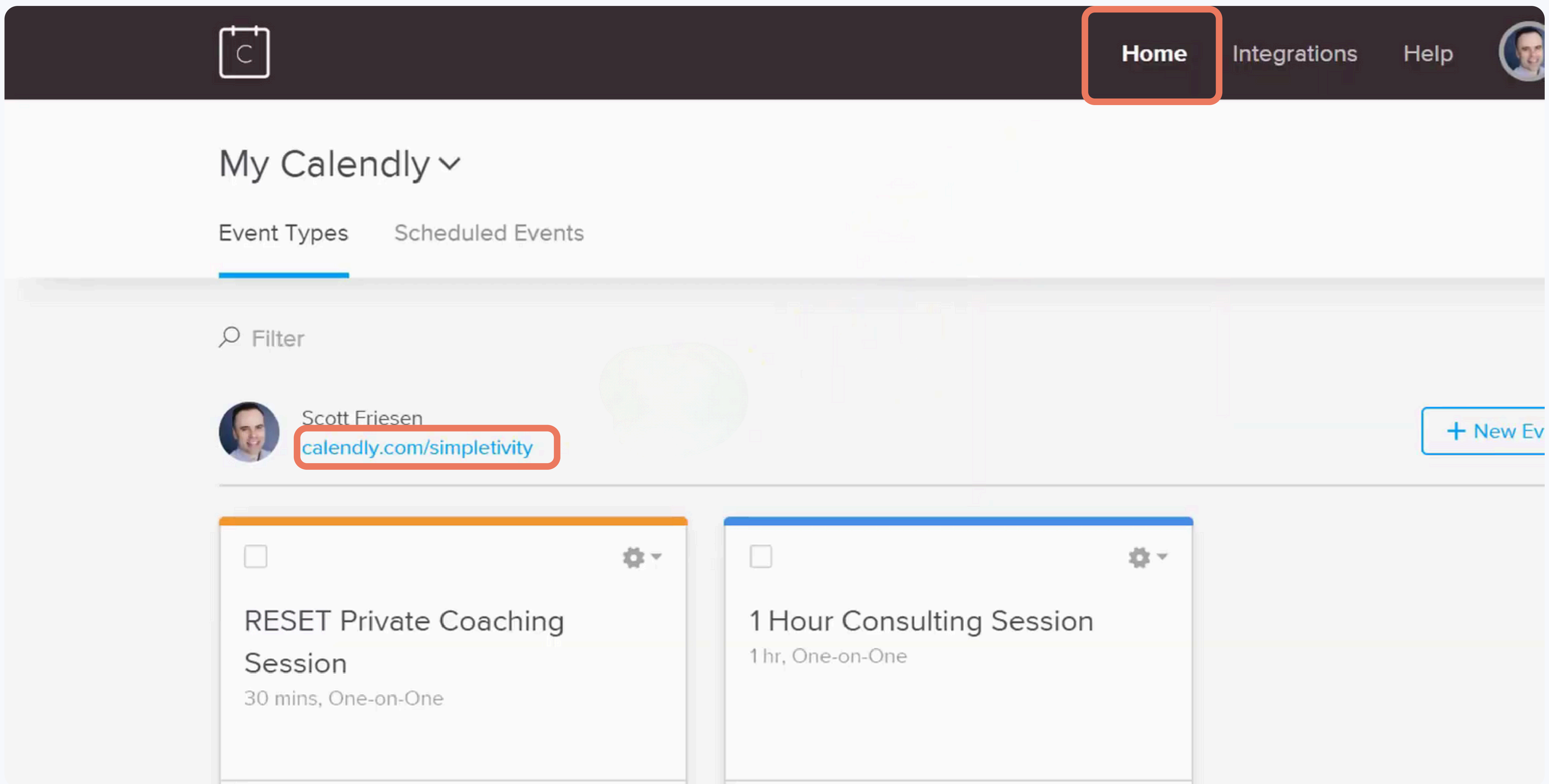
07 Next, click on 'Branding', add your company logo or some other image that you would like to add.



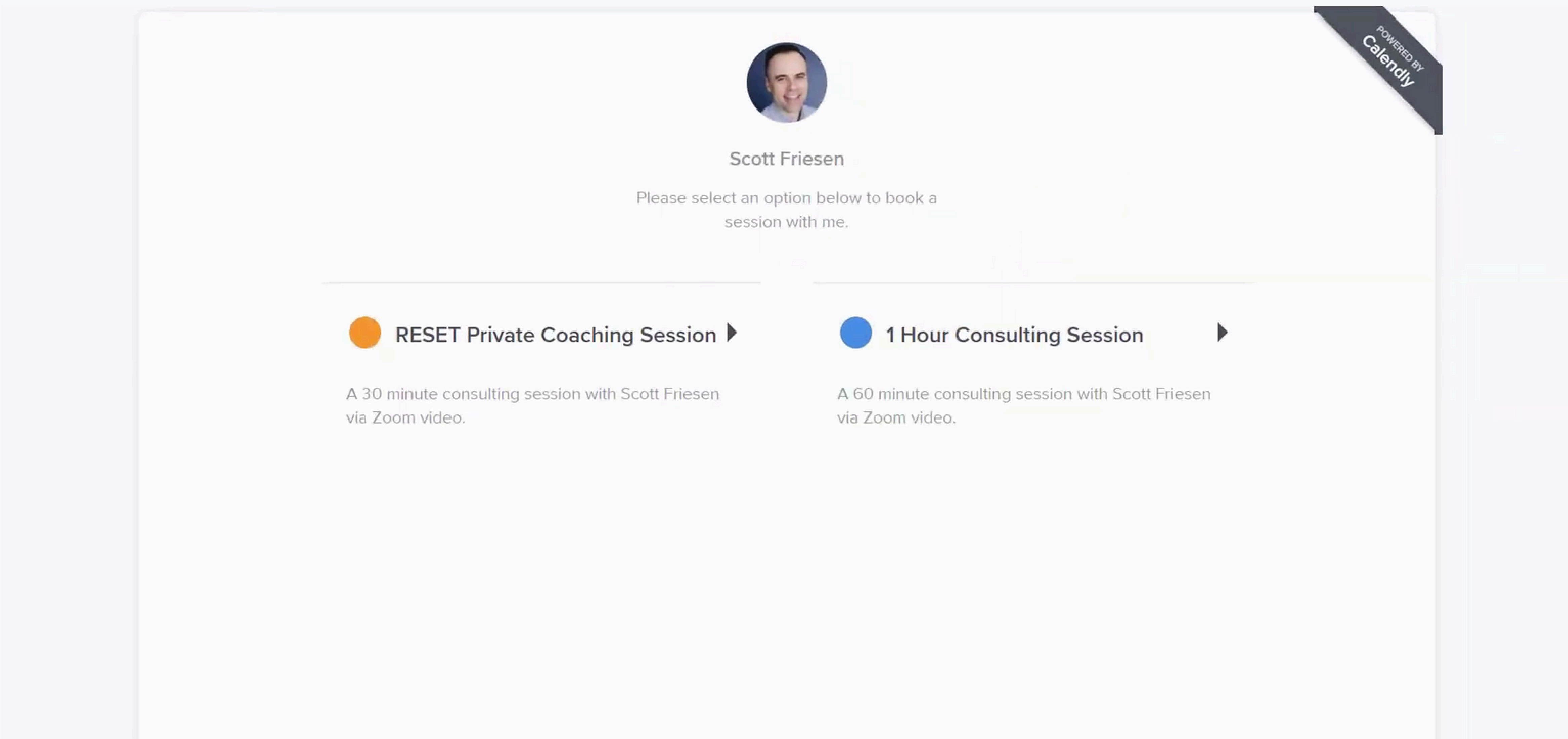
08 Lastly, in the 'My link' page, this is where you can find your calendar URL that you're gonna be sharing with other users. This is what you can link from your website or your social media accounts or you can just copy and paste this and give it to people directly so that they can land on your calendar page.



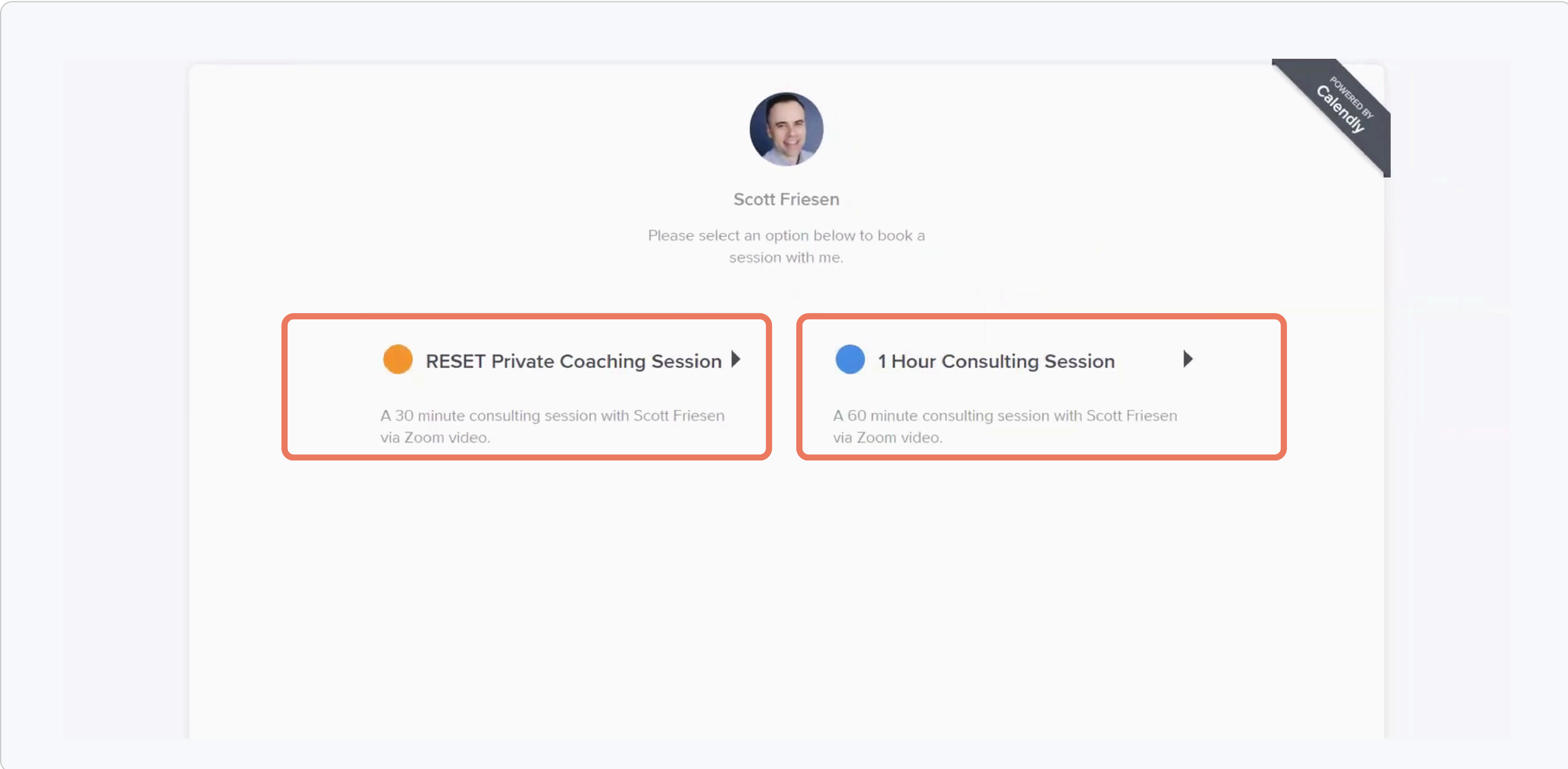
09 Now, once you've finished with your account settings, to check where and how those changes take place, go back to the home screen and click on your Calendly link.



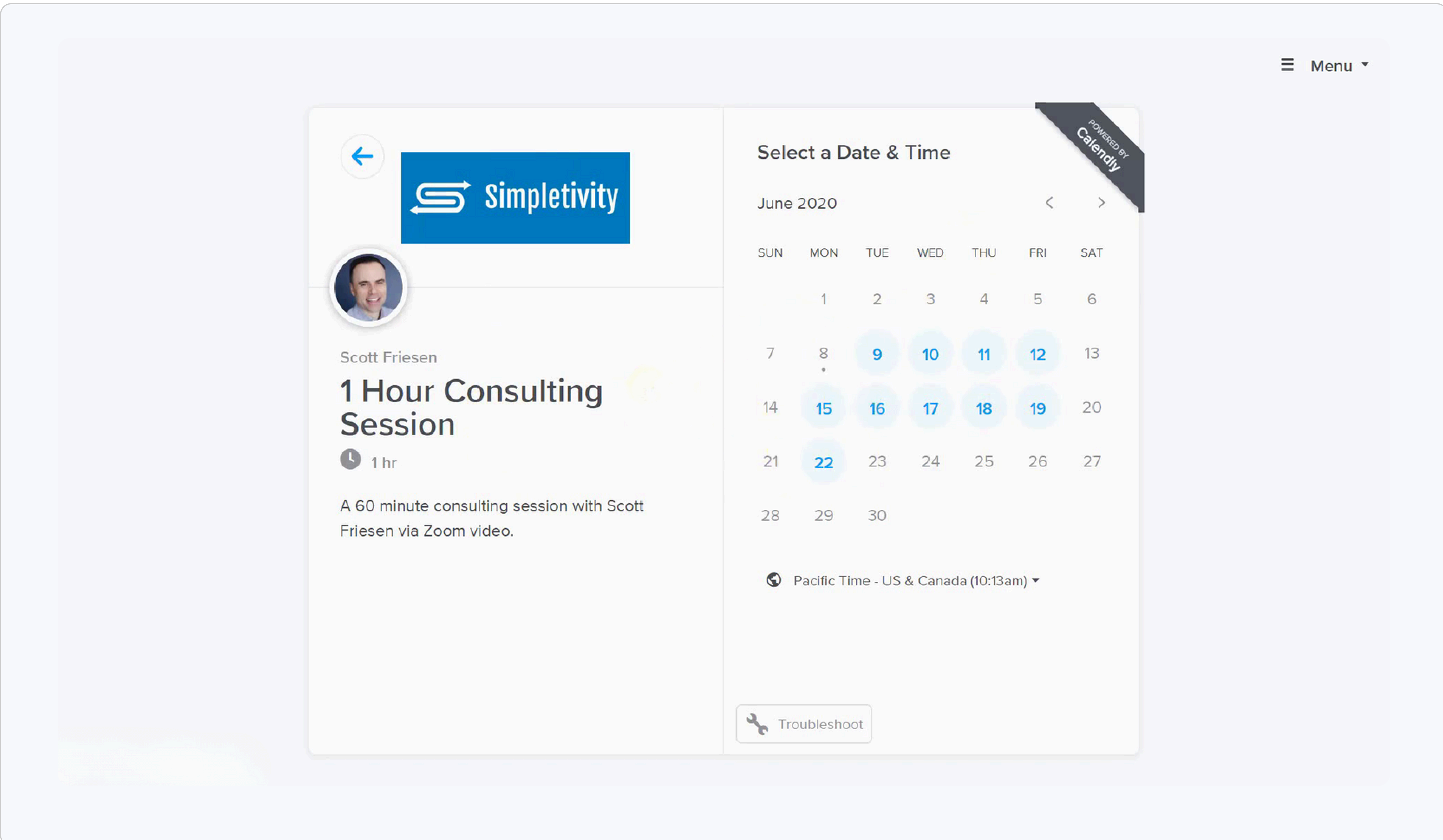
10 So, this is your initial landing page where people are going see your profile image, your name and the welcome image.



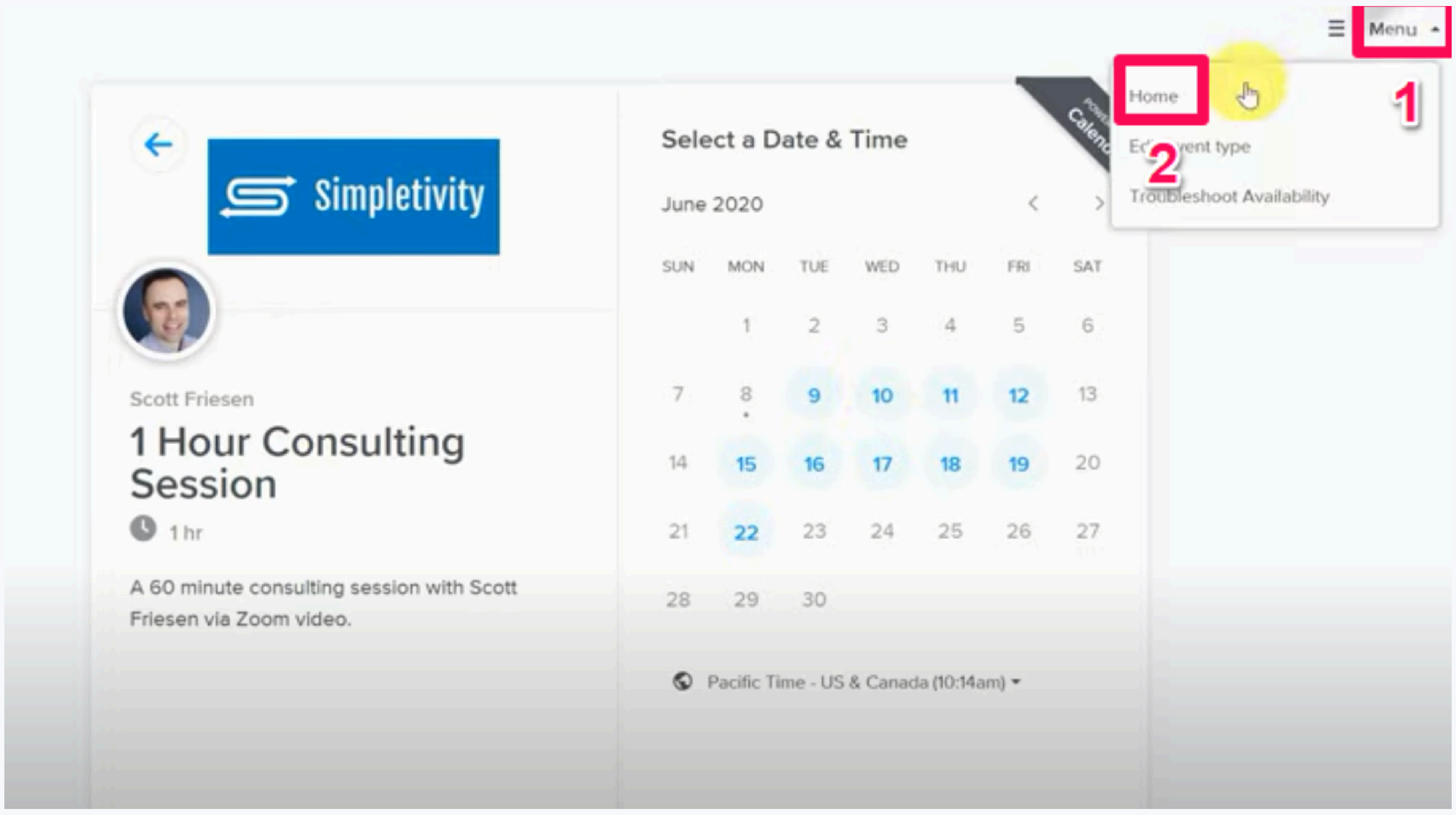
11 In this sample, it has 2 events that people can choose from. Click on the event on the right side.



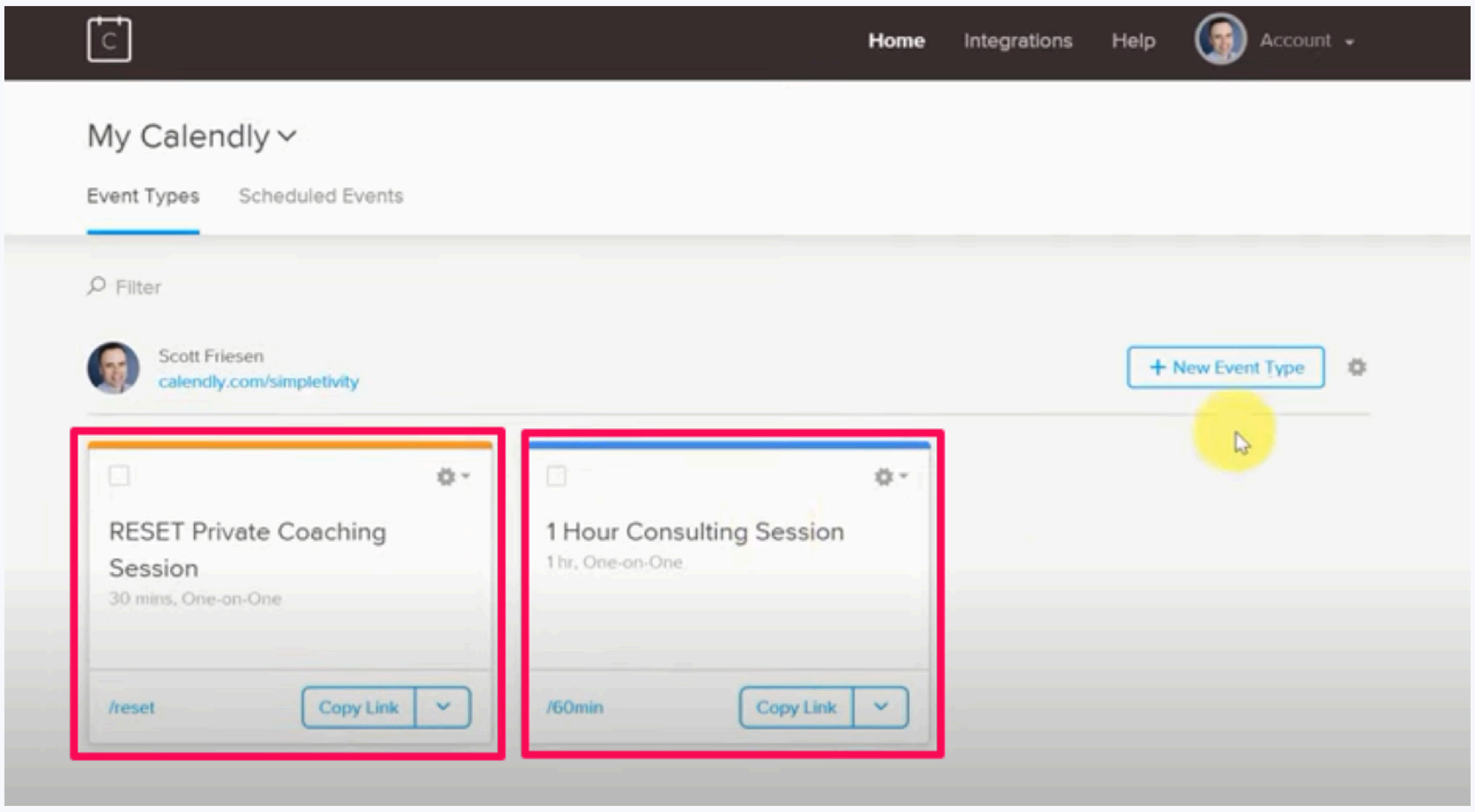
12 When you click on the event on the right side, it will direct you to the calendar page. People are going to see the branding and this is where the logo comes into play and they'll also see your calendar where they can book a meeting/event.



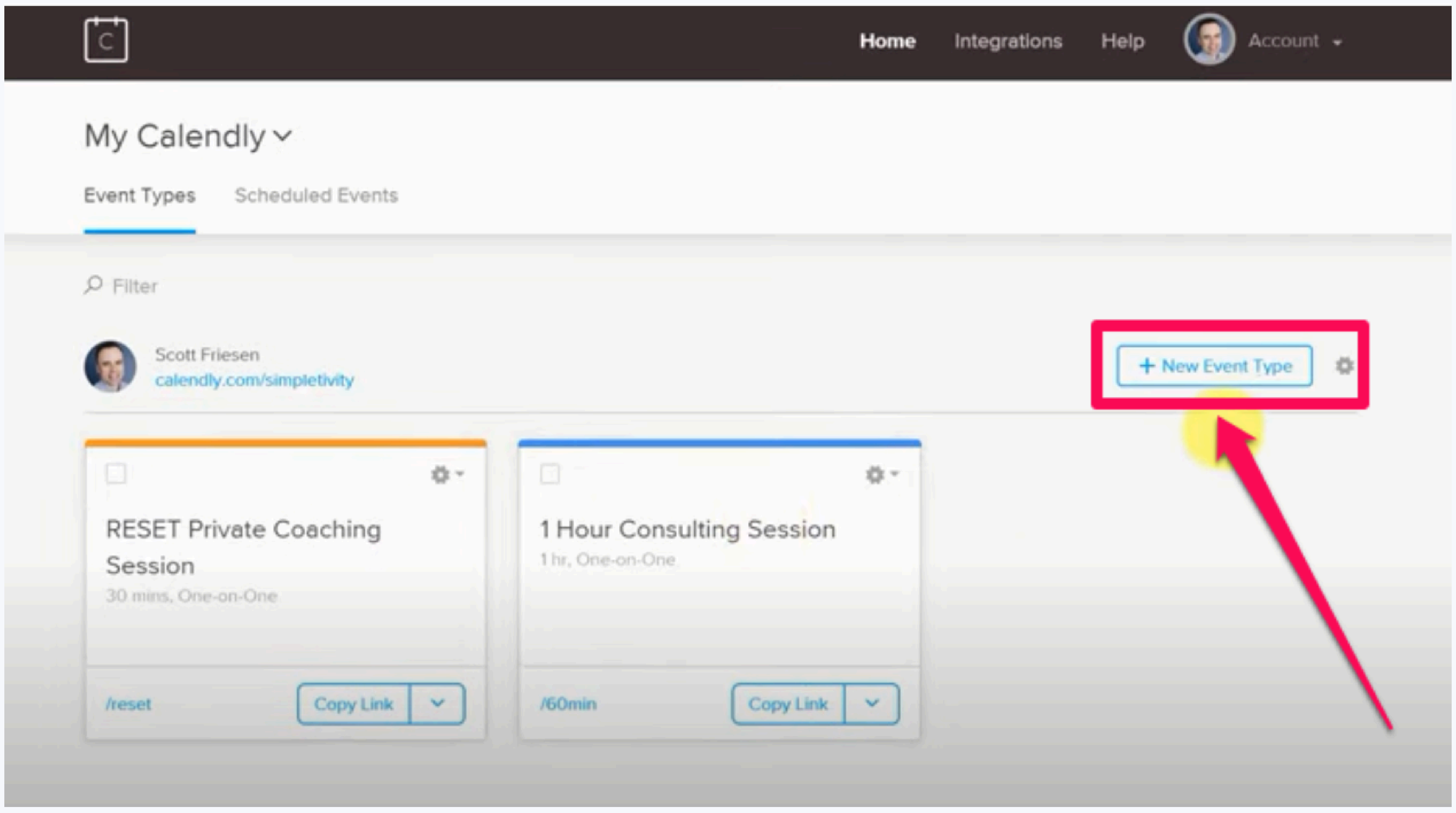
13 Now, let's go to the events themselves and how you can set up/add one or more events so that it's easy for your clients to book time with you. Go back to your home screen by clicking on 'Menu' then click on 'Home'.



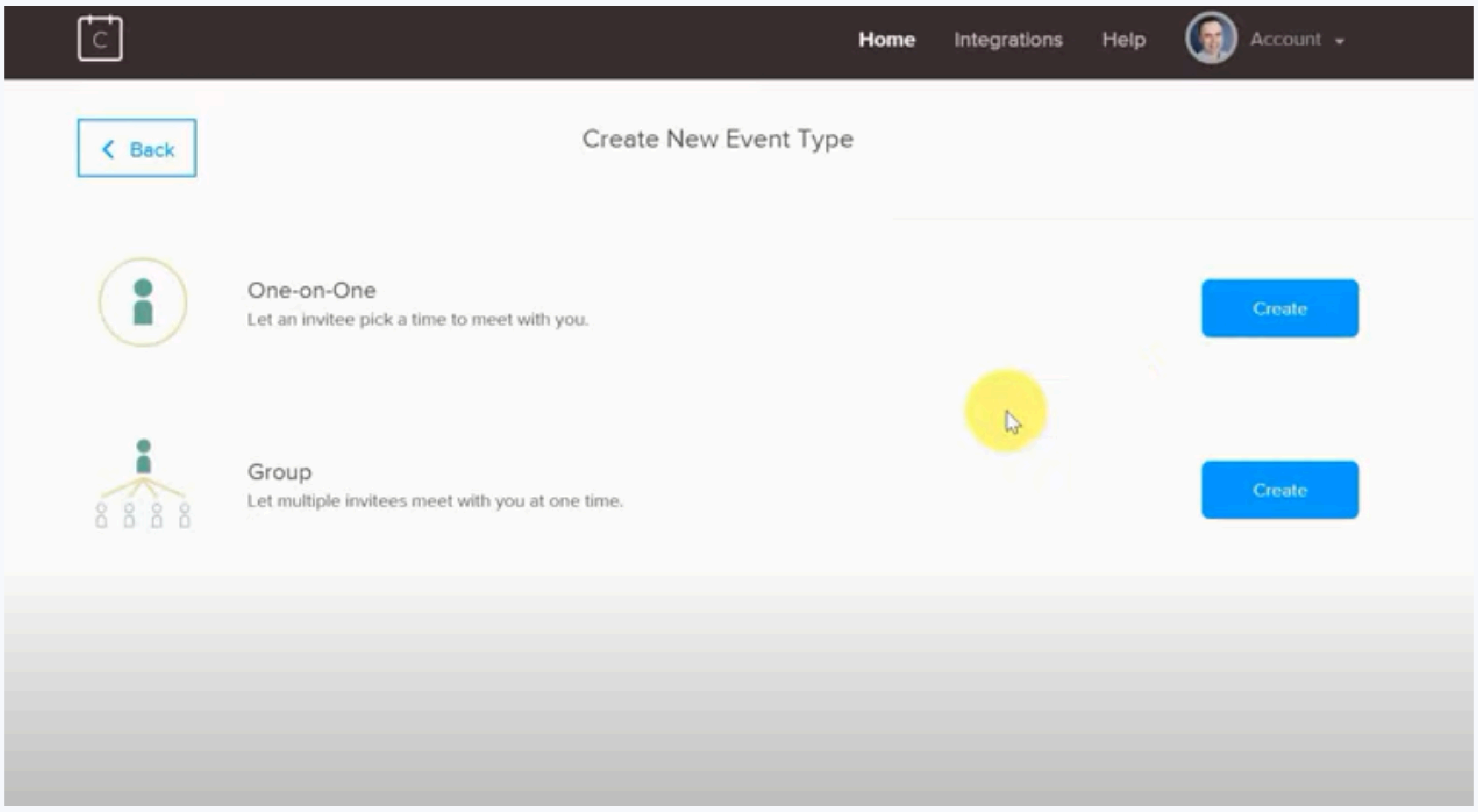
14 The home screen is your main page where you can add and edit existing events. In the sample below, there are already 2 existing events.



15 To create a new event from scratch, click on the 'New Event Type' button

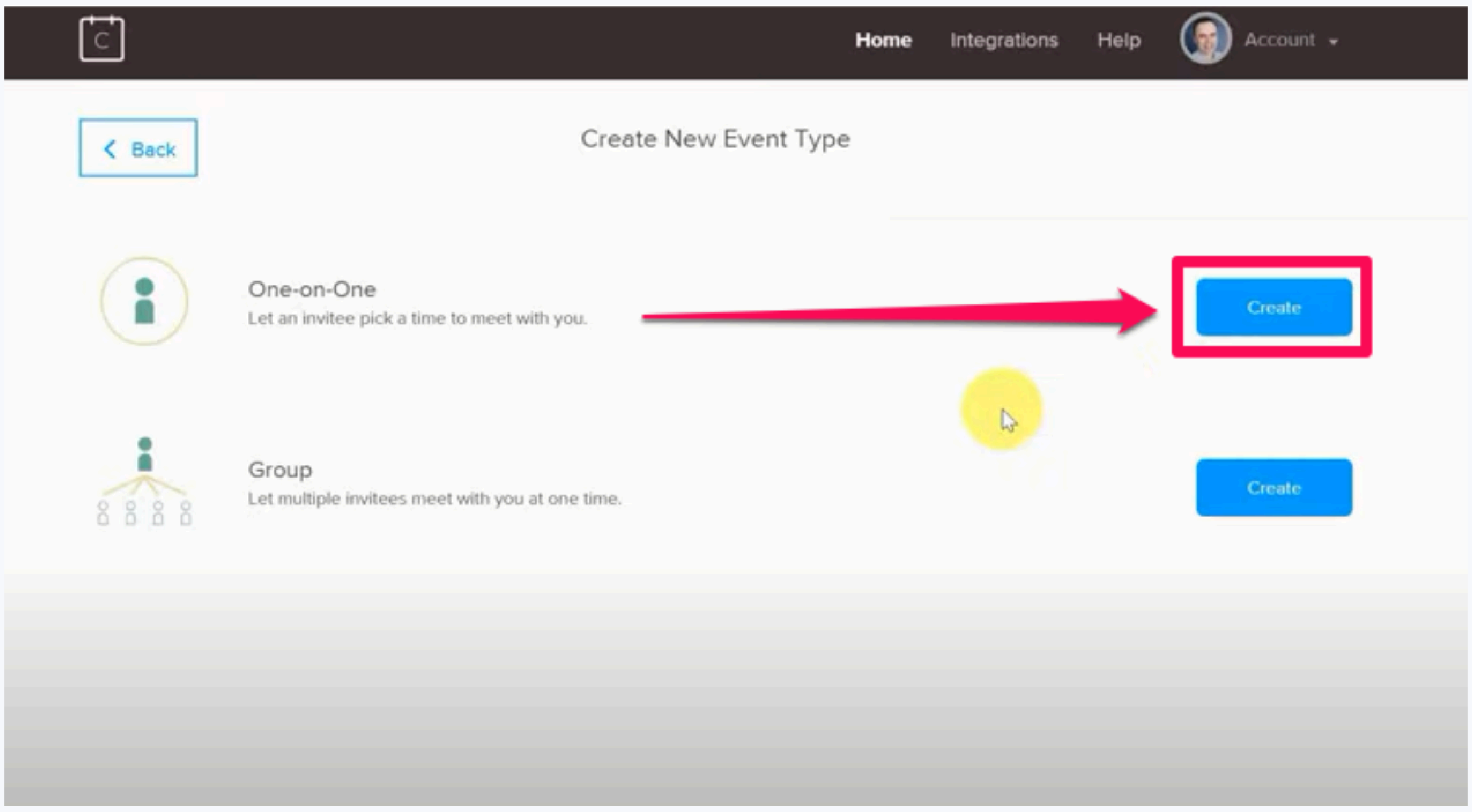


16 After that, you'll be directed to the 'Create New Event Type' page. You have 2 choices here. You can either create a one-on-one meeting or a group meeting.

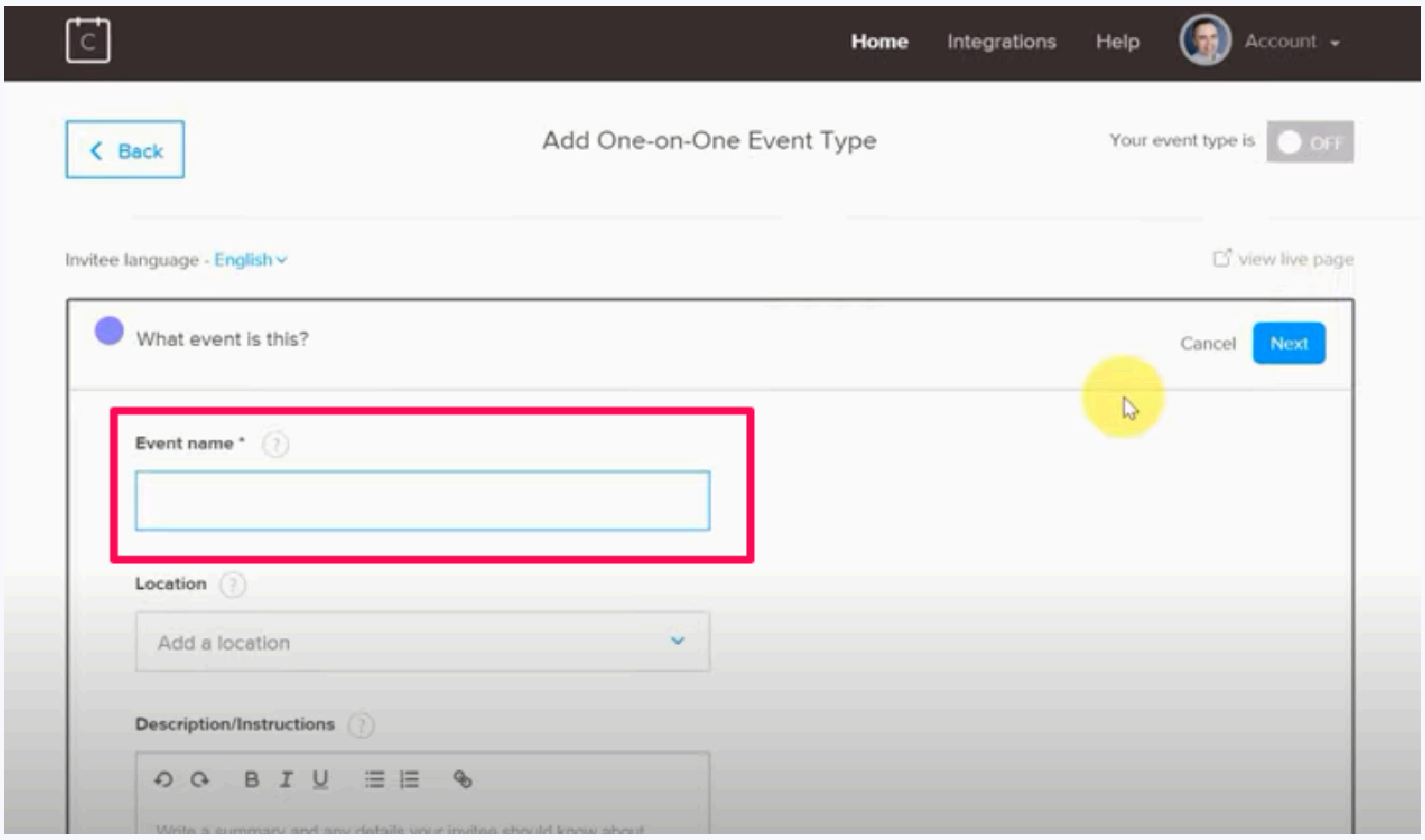


A group meeting lets multiple invitees meet with you at a single time. It may be great for a teacher or if you are conducting a group webinar. In most cases, the majority of people are using Calendly for one-on-one meetings.

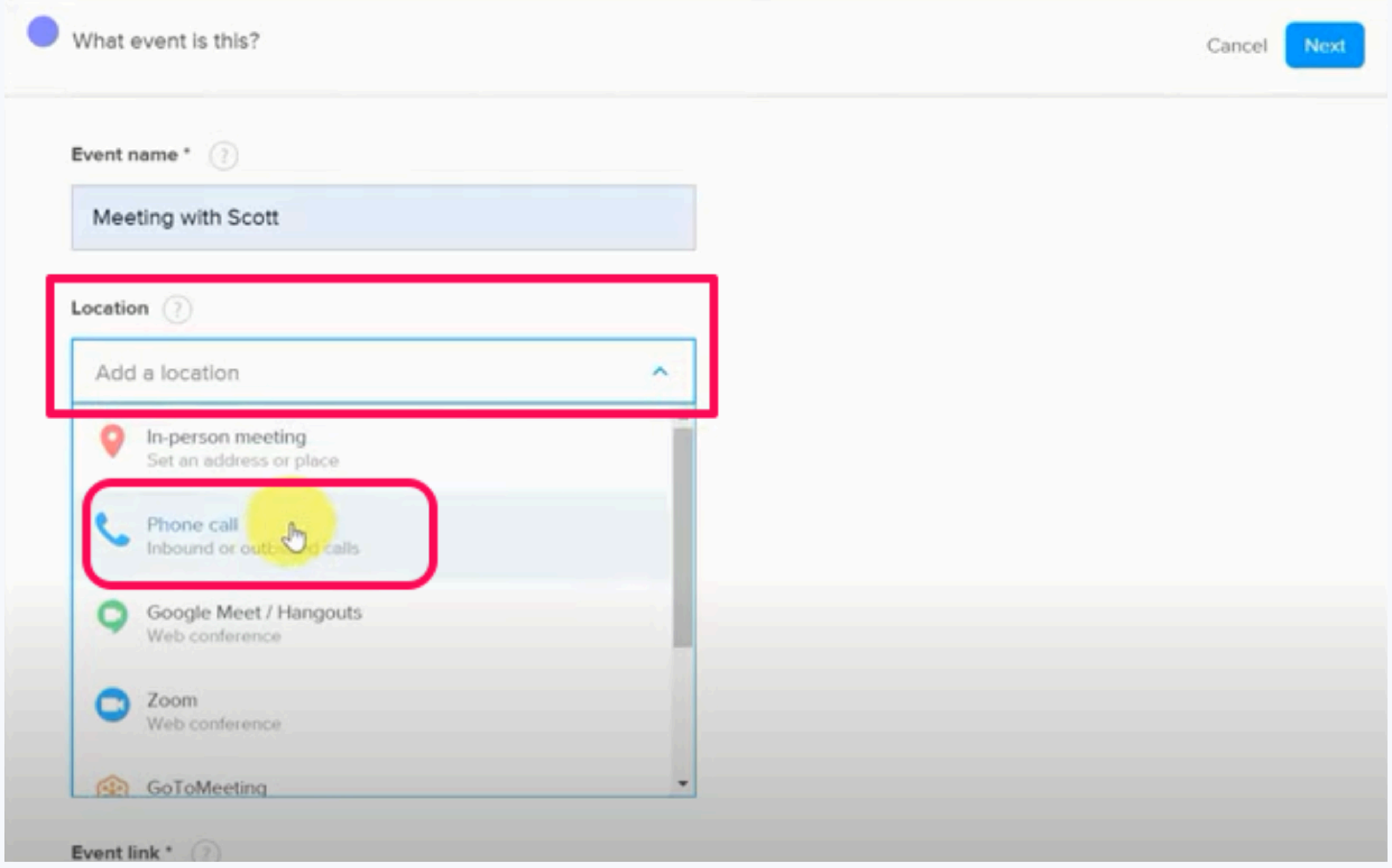
17 Let's say you want to create a 'One-on-one, simply click on the 'Create' button,



18 Now, the first thing that you need to do is to type in the event name. Remember, this is more than just your reference. This is what people are gonna see when they land on your Calendly page.



19 Next, add a location by selecting from the drop-down choices.



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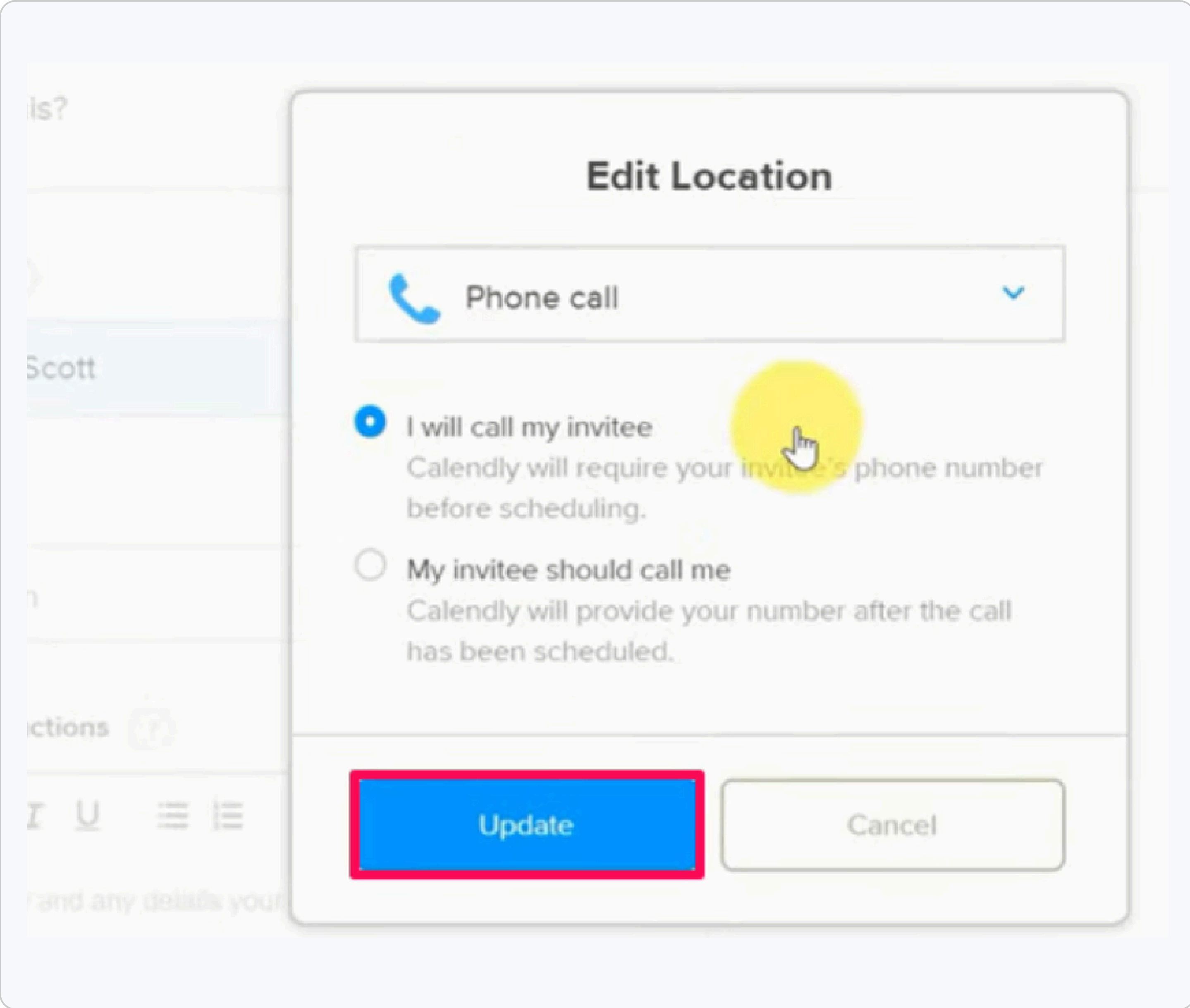
For example, if you choose a phone call, you'll see 2 options. Either you're going to call your invitee or your invitee should call you.

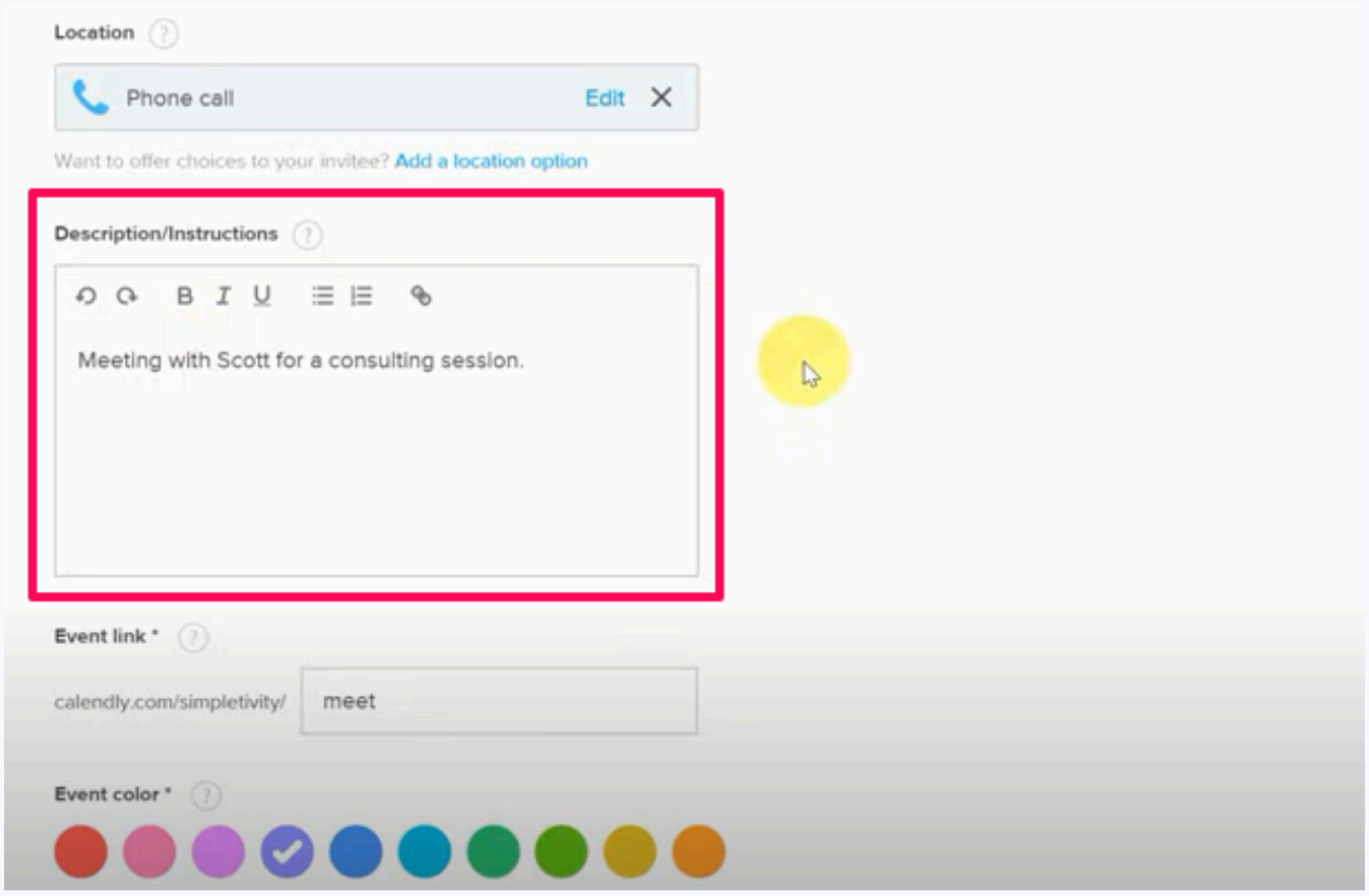
- I will call my invitee - Calendly will require the invitee's phone number before scheduling
- My invitee should call me - Calendly will provide your number after the call has been scheduled.



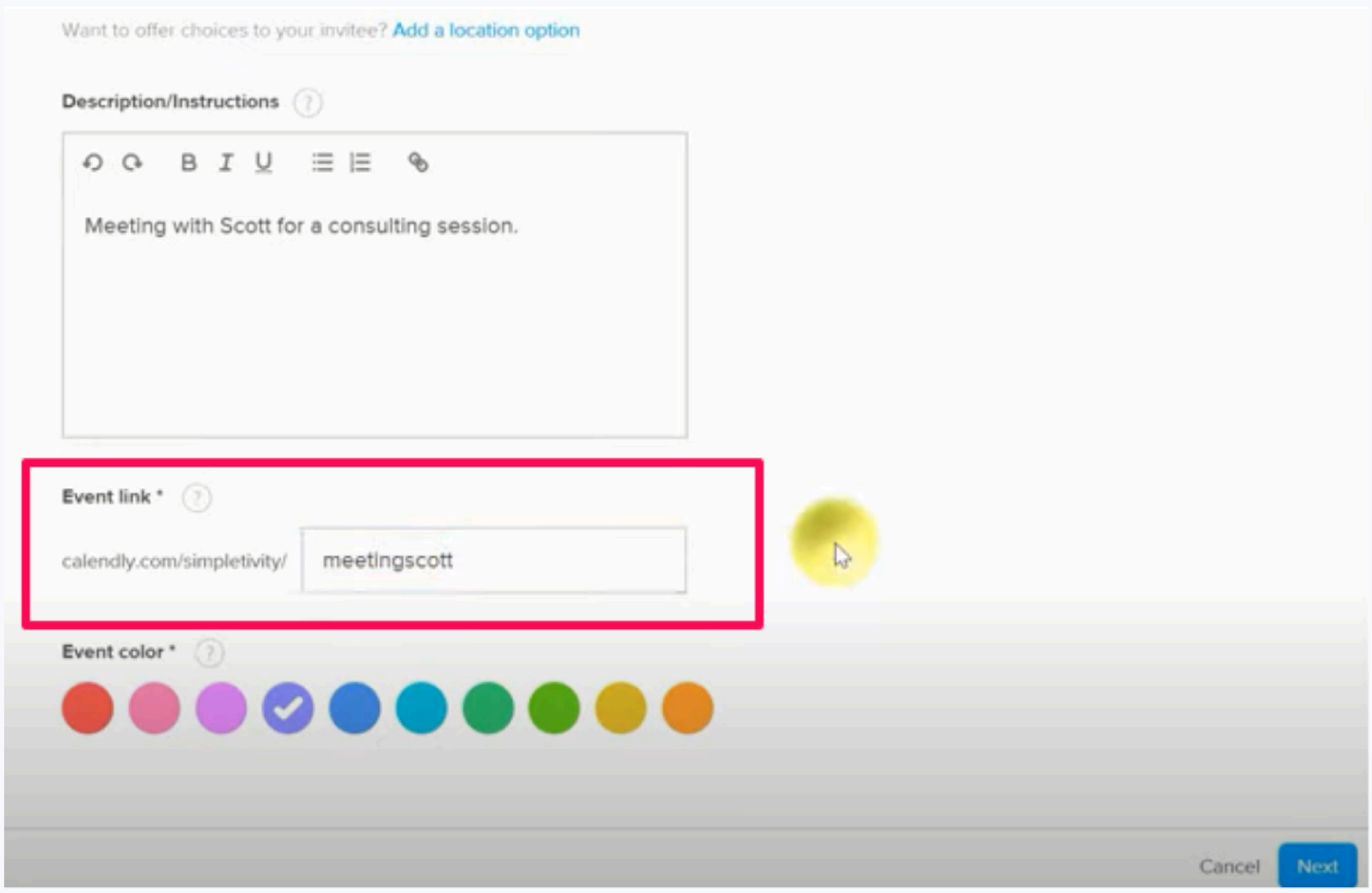
Great thing with Calendly is that it's not going to display the phone numbers until they have booked the appointment.

After choosing your preference, click on 'Update' to save your option.

21 Next, add a 'Description/Instructions' about the event. This is something you don't wanna overlook especially if you have multiple events that you're gonna be offering to your users. This will help them differentiate what the event is about compared to some other events that you have available.



22 After that, fill in the 'Event link'. You can put your domain name or your business name or your full name to get them to your main Calendly page. This is something you wanna share so make it as specific as possible.



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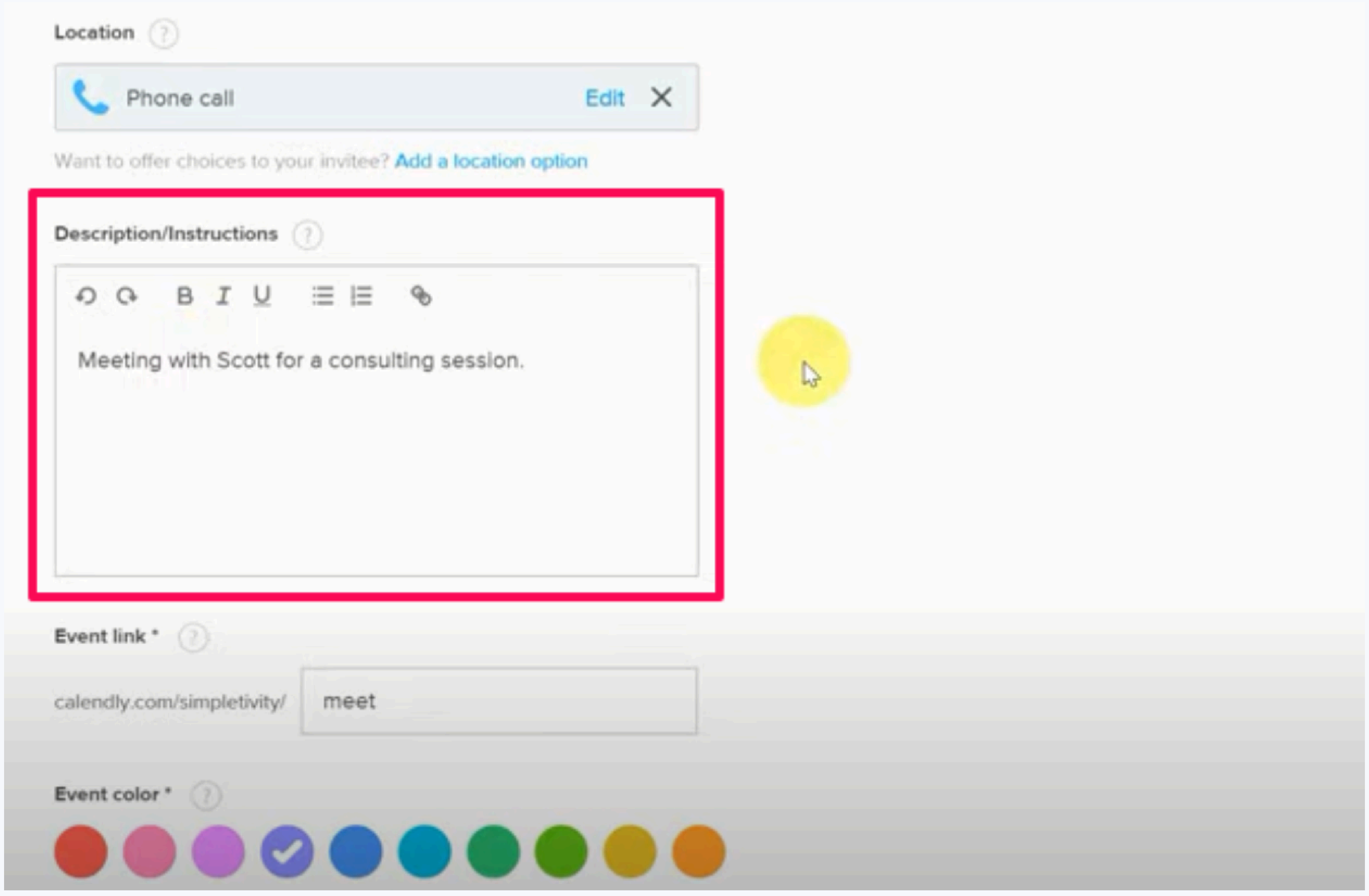

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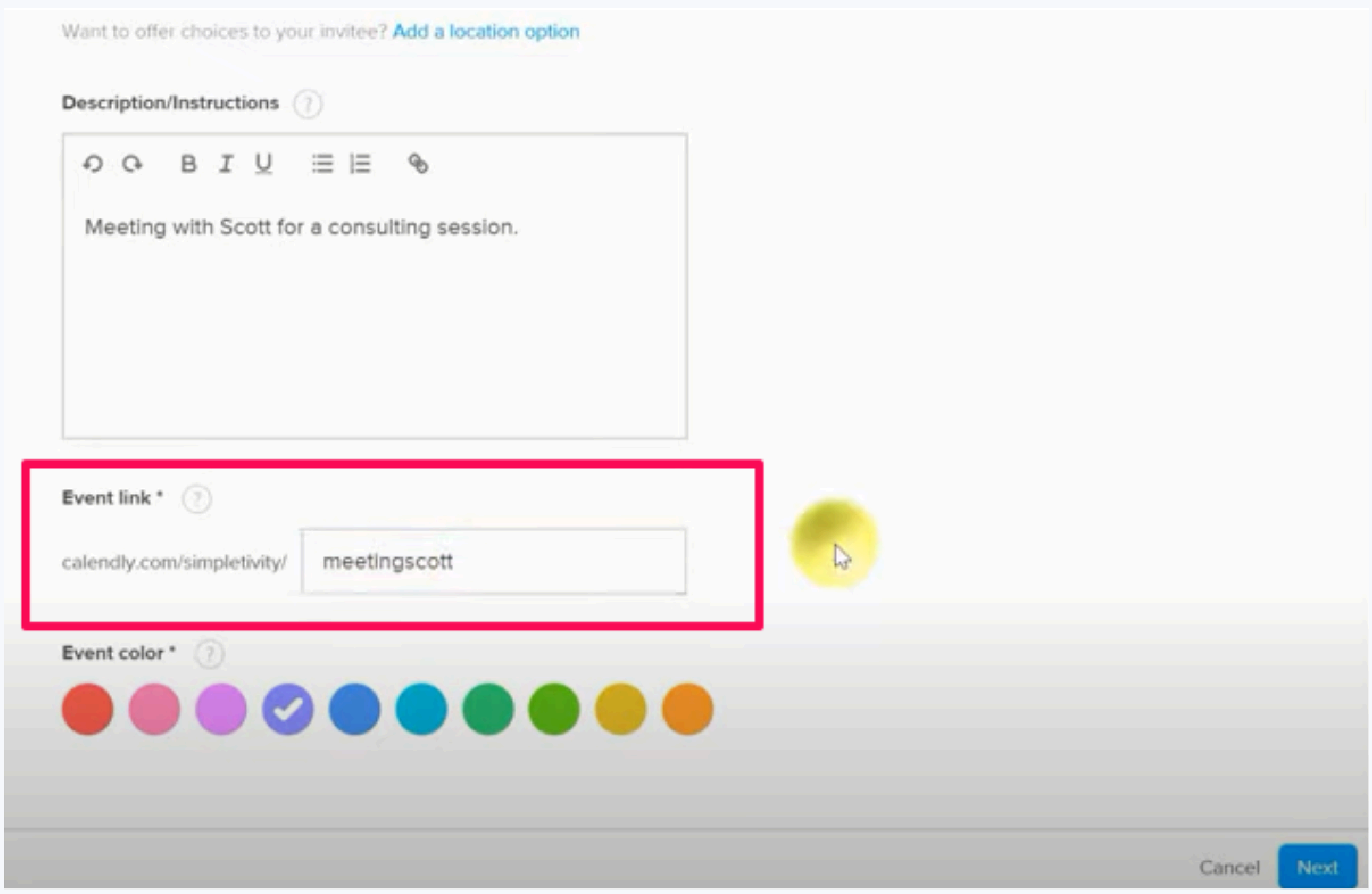

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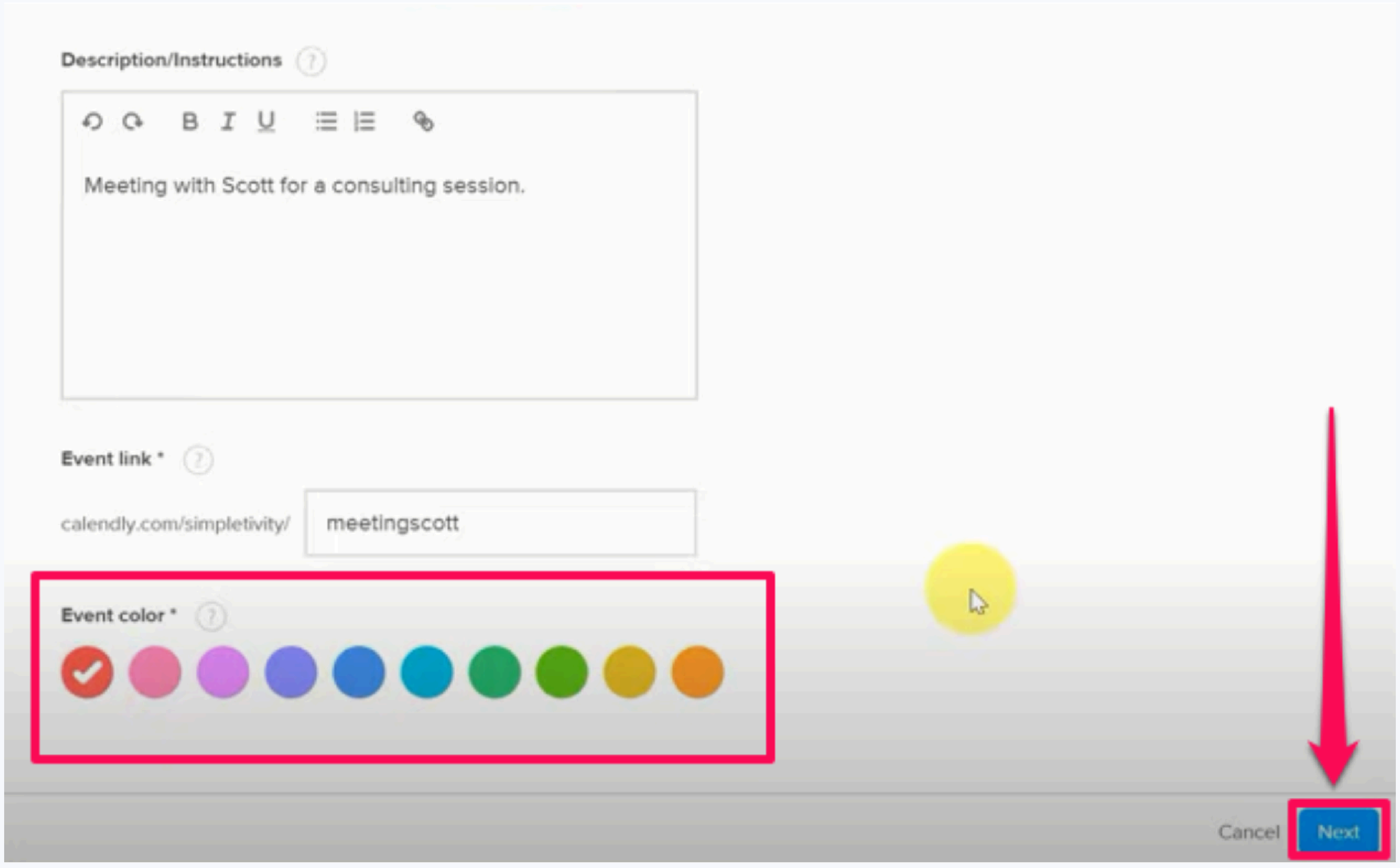
Lastly, choose an event color. This is very helpful if you have multiple events. Then hit ‘Next’.



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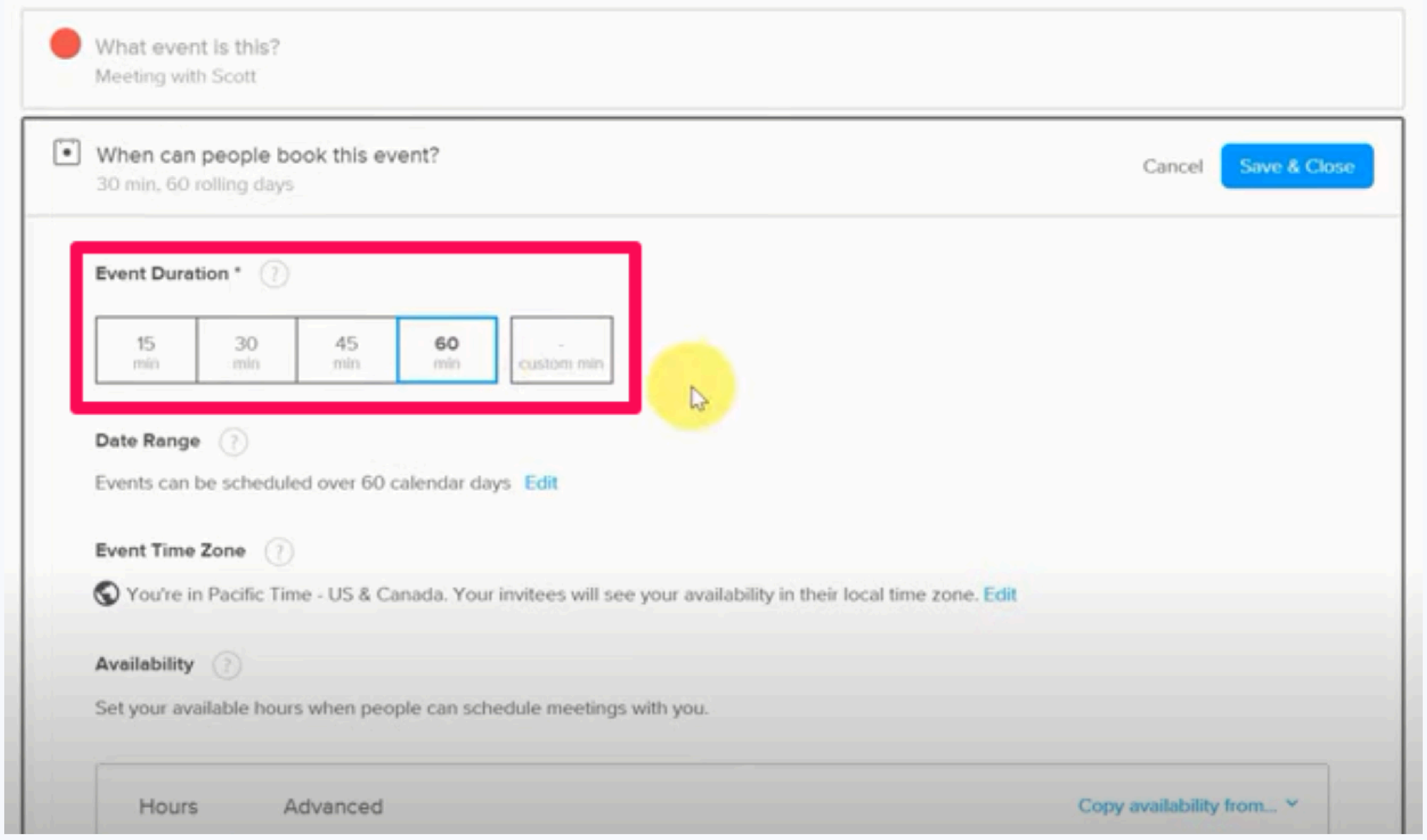
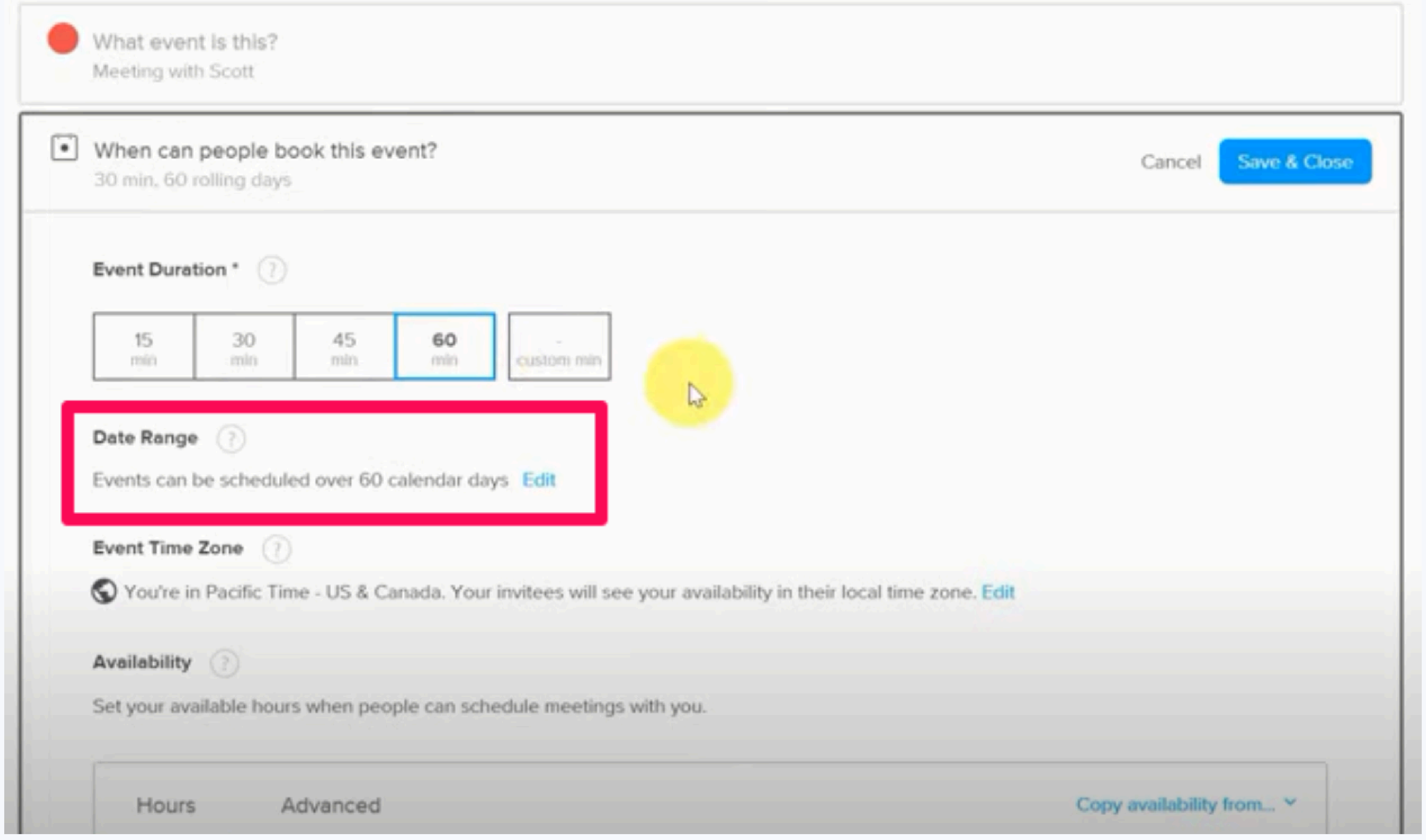
📌When Can People Book an Event

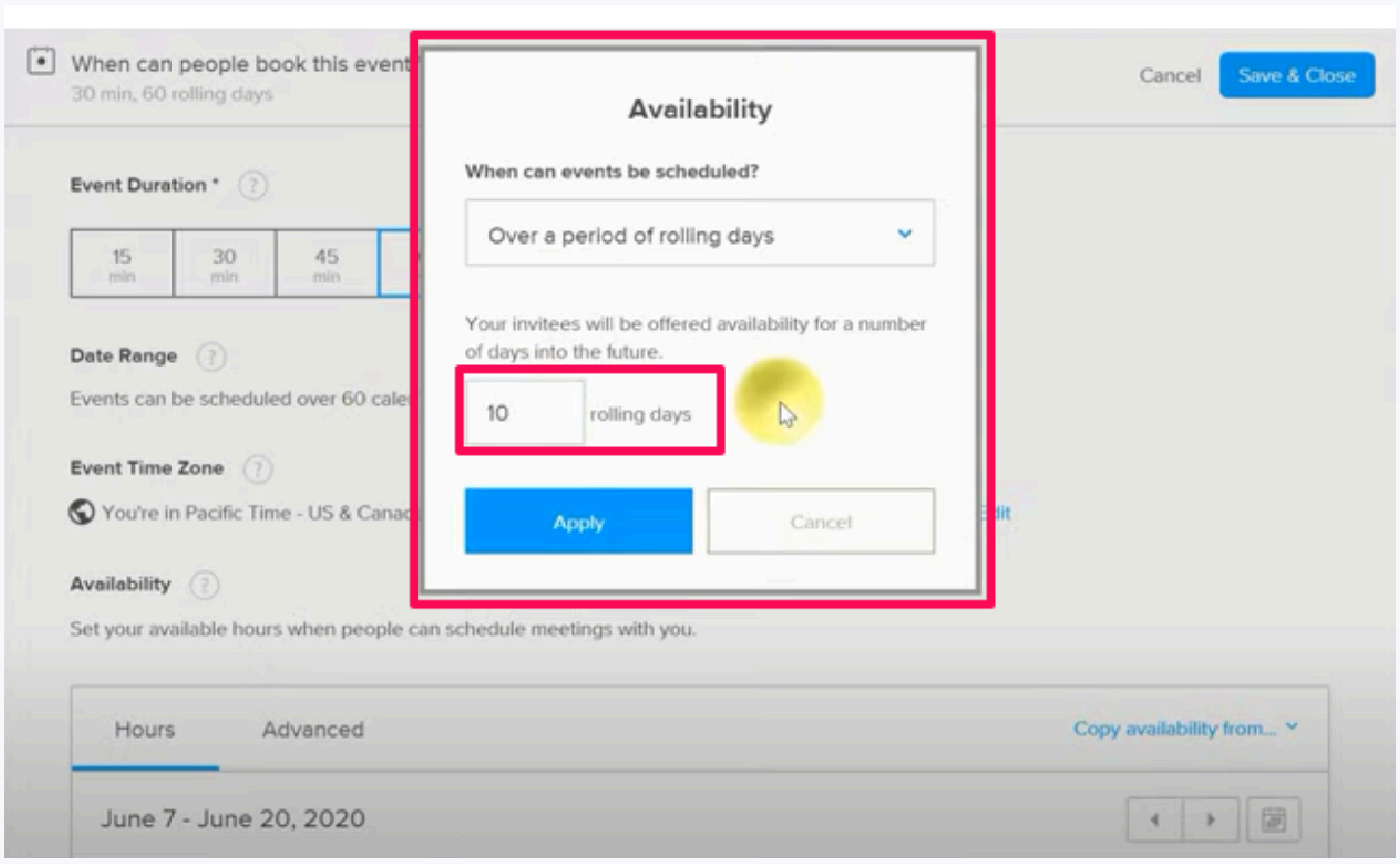
Now, click on “When can people book this event’. Then set up the event duration. By default, it’s usually set to 30 min. If none of the choices works for you, for example you want to set up a 90 min meeting, you can select the ‘custom min’ option from there.



25 ‘Date Range’ can be scheduled over 60 calendar days. Meaning they can book you out up to two months in advance. You can edit the date range. To do it, click on ‘Edit’.

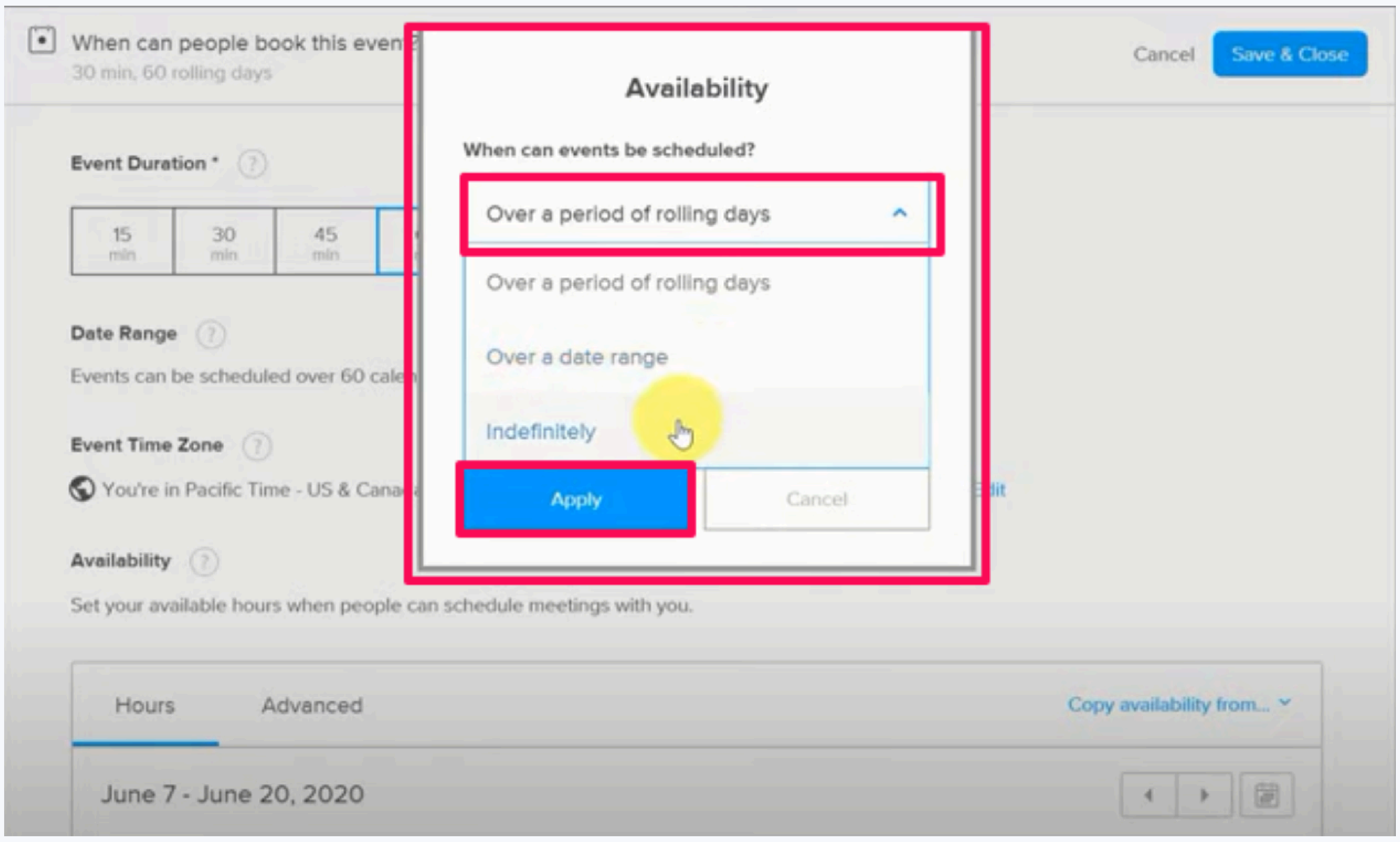


26 You can put, for example, 10 rolling days if you think 60 calendar days is too much. Meaning, they can only schedule you within the next 10 days.

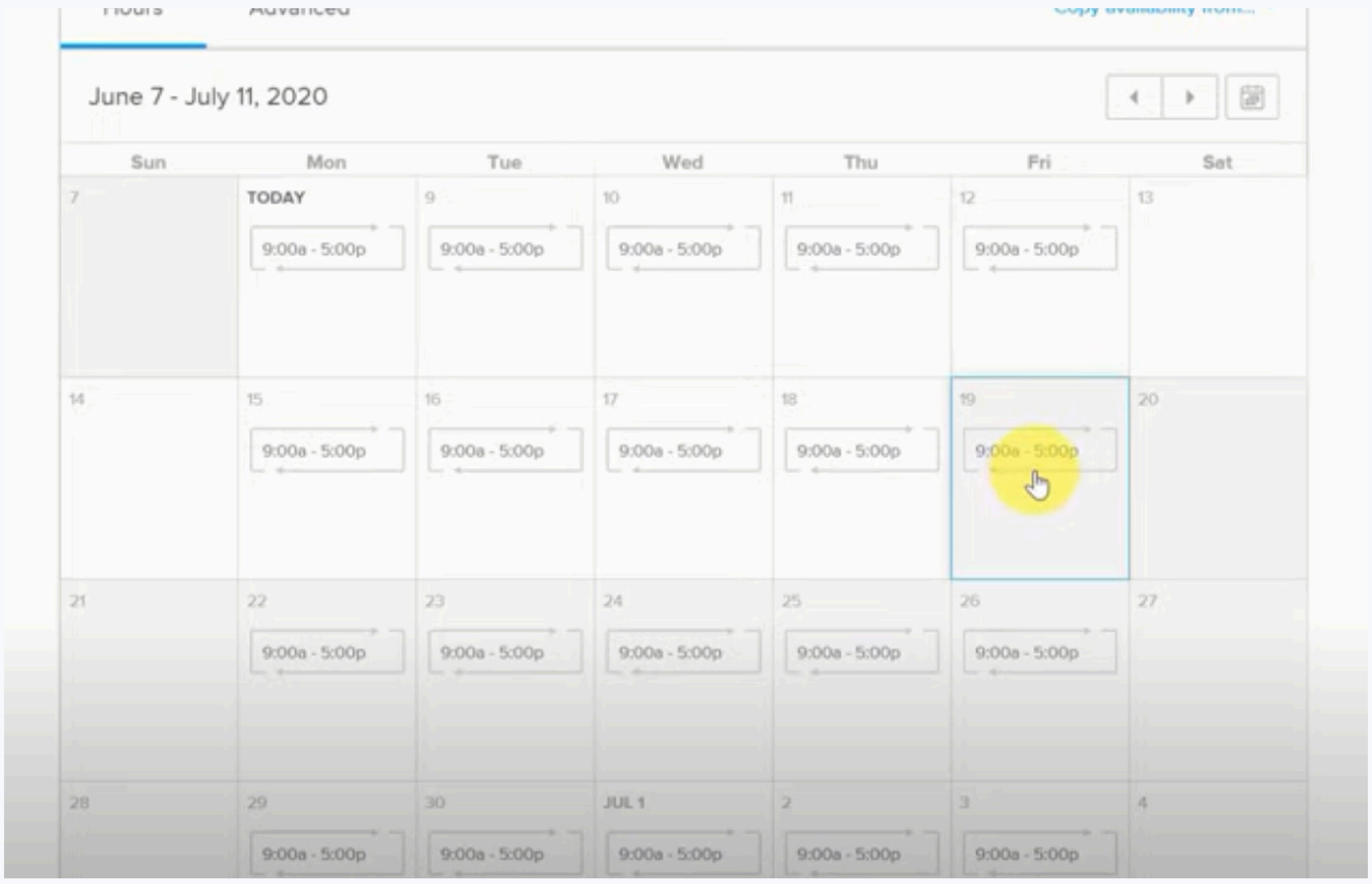


27 You can also change rolling days to a specific date range. This can be helpful if you have a special set of office hours, maybe a two week period where you are just offering a special service, you can do so here. The third option is also to choose indefinitely. Basically this means that they can book you any time in the future. So, rolling days are typically the most standard option here.

After setting up the availability, hit 'Apply'.



28 The nice thing about this page is if you scroll down, it can actually show you what that looks like on your calendar. The things that are grayed out means that that's past the 10 day rolling period.



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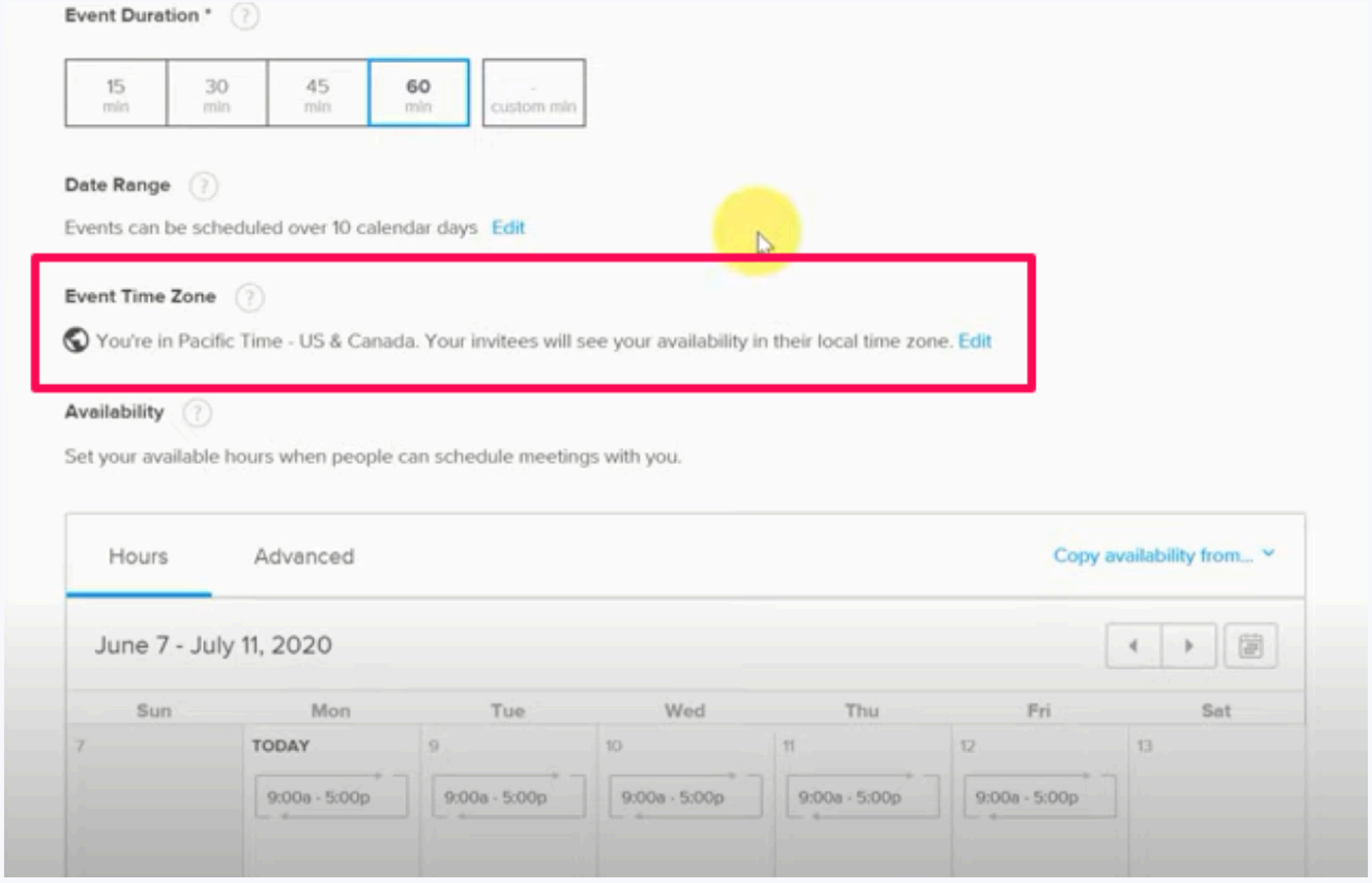
Now, 'Event Time Zone' by default, is gonna show in your time zone which you set in your account settings and your invitees will also see it in their default or local time zone which is typically ideal.



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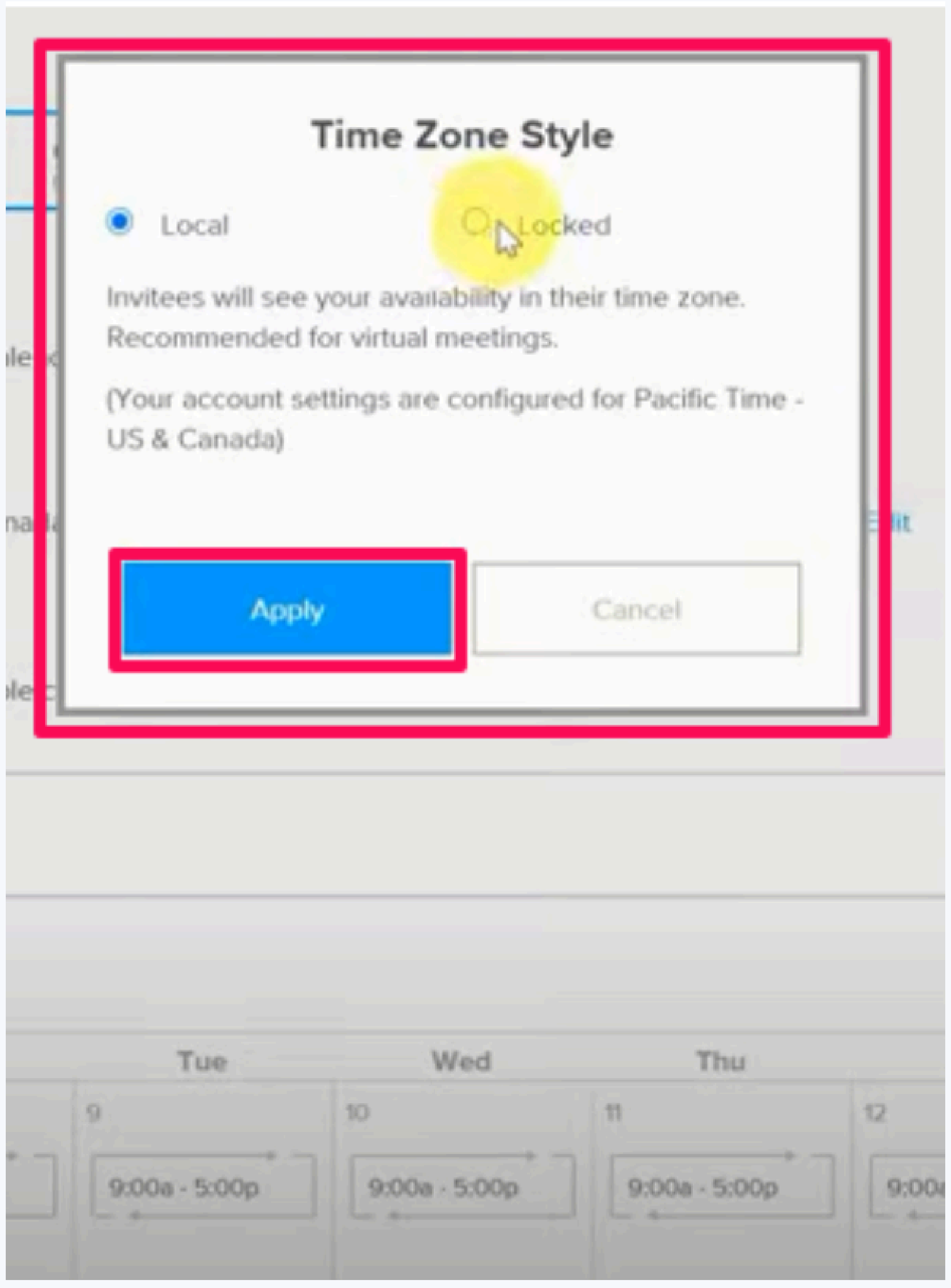
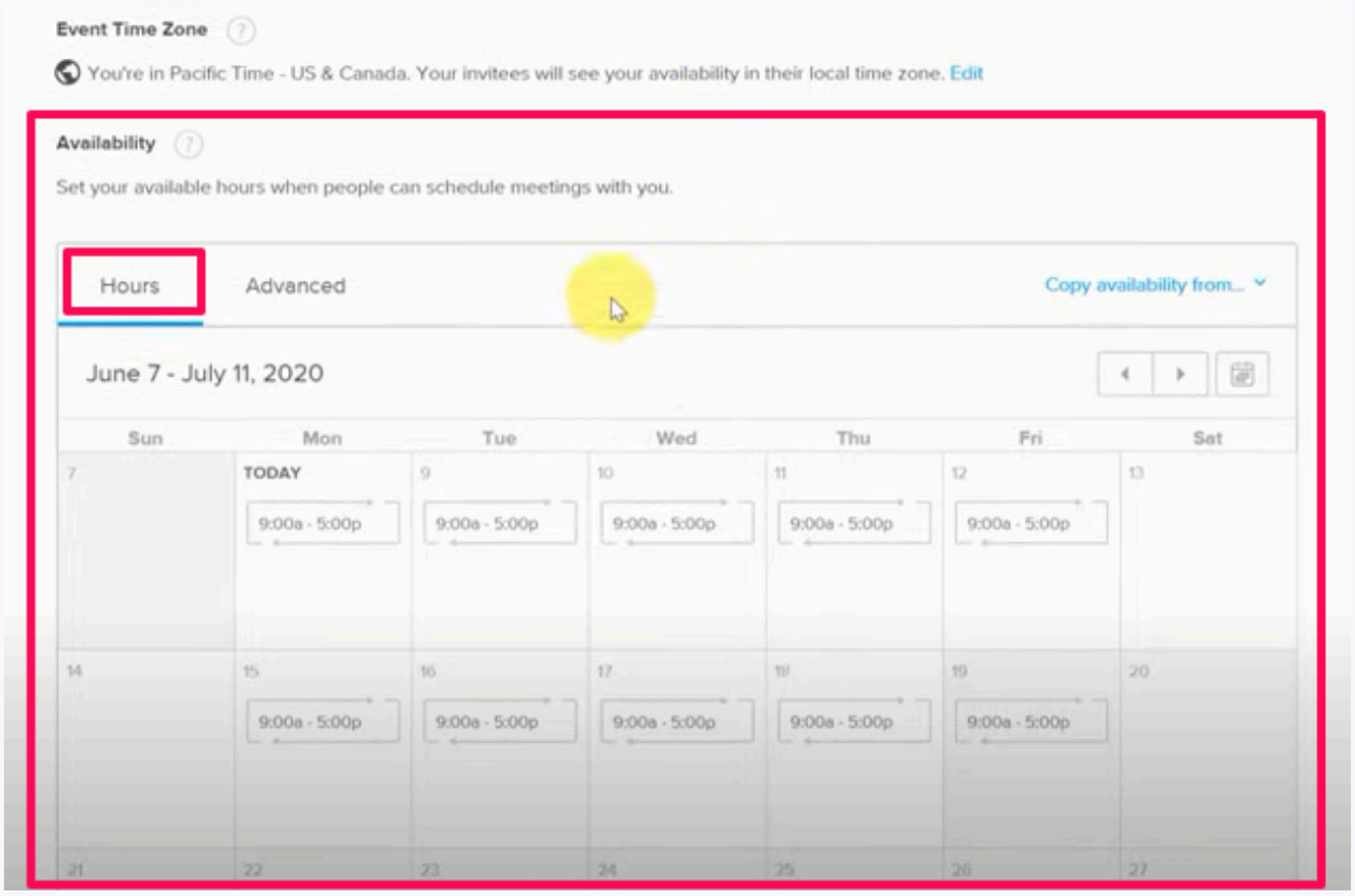
You can edit it if you want to, you can lock the time zone but that is really only recommended if this is gonna be a physical meeting that you're meeting at a specific address or location. For most of us, we are meeting via video conferencing or via phone so you wanna keep it local so you don't have to worry about making the configurations or the calculations of the time zone difference and they don't have to either. It's just gonna show up in their local time zone.

Click on 'Apply' after setting up the 'Time Zone Style'.



31 The next feature is the calendar preview located under 'Availability'. Firstly, it is recommended that you select specific days.



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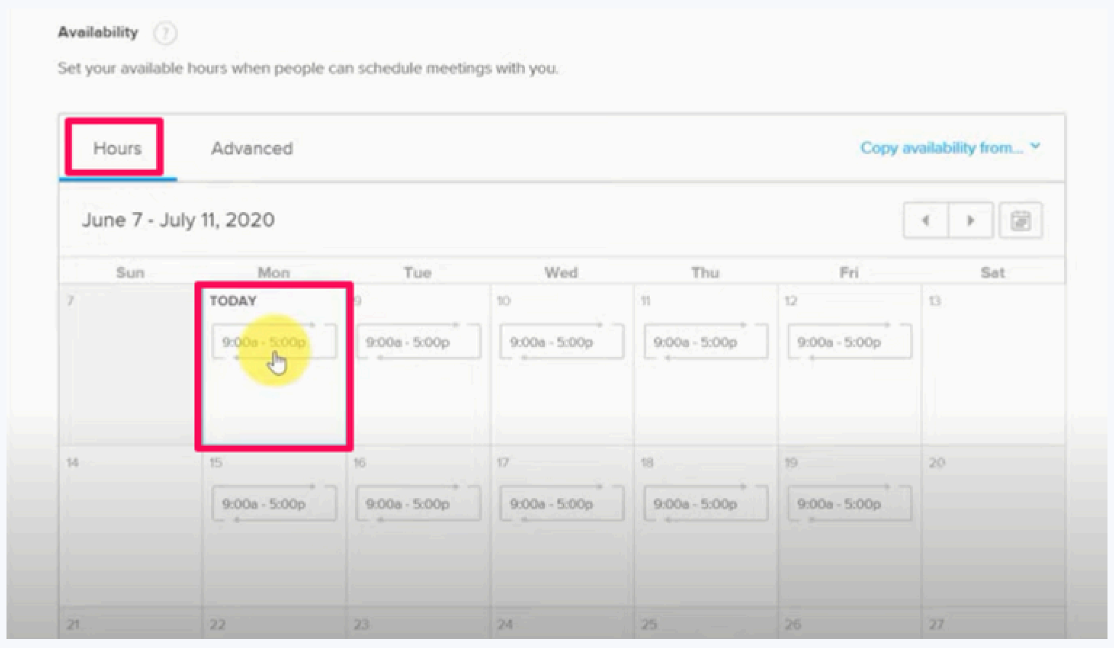
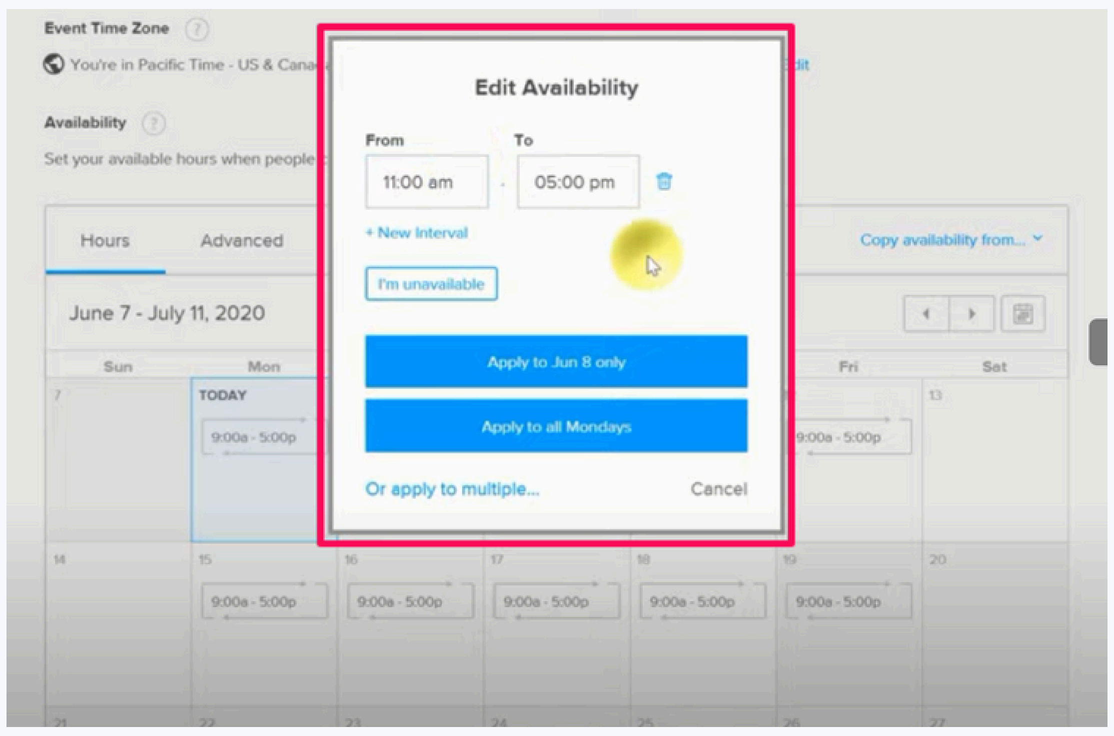
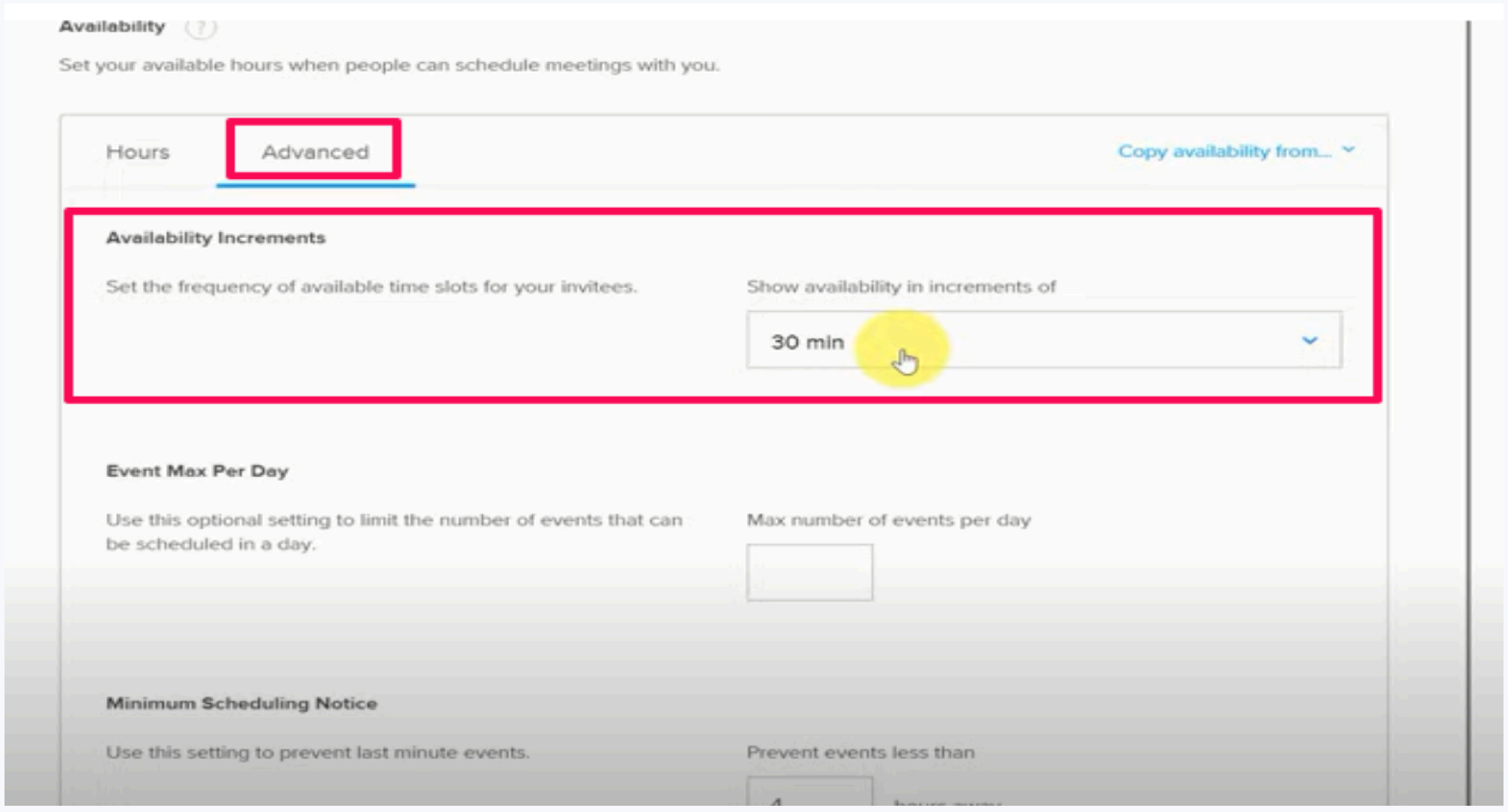
This is where you set your actual available hours for booking. Note that this is synced with the calendar you set up in your account settings, so you will not be double booked. If you have selected a calendar for Calendly to check, it will not double book if there is already an event scheduled, whether Calendly scheduled it for you or if you, or someone else, booked the calendar in advance.



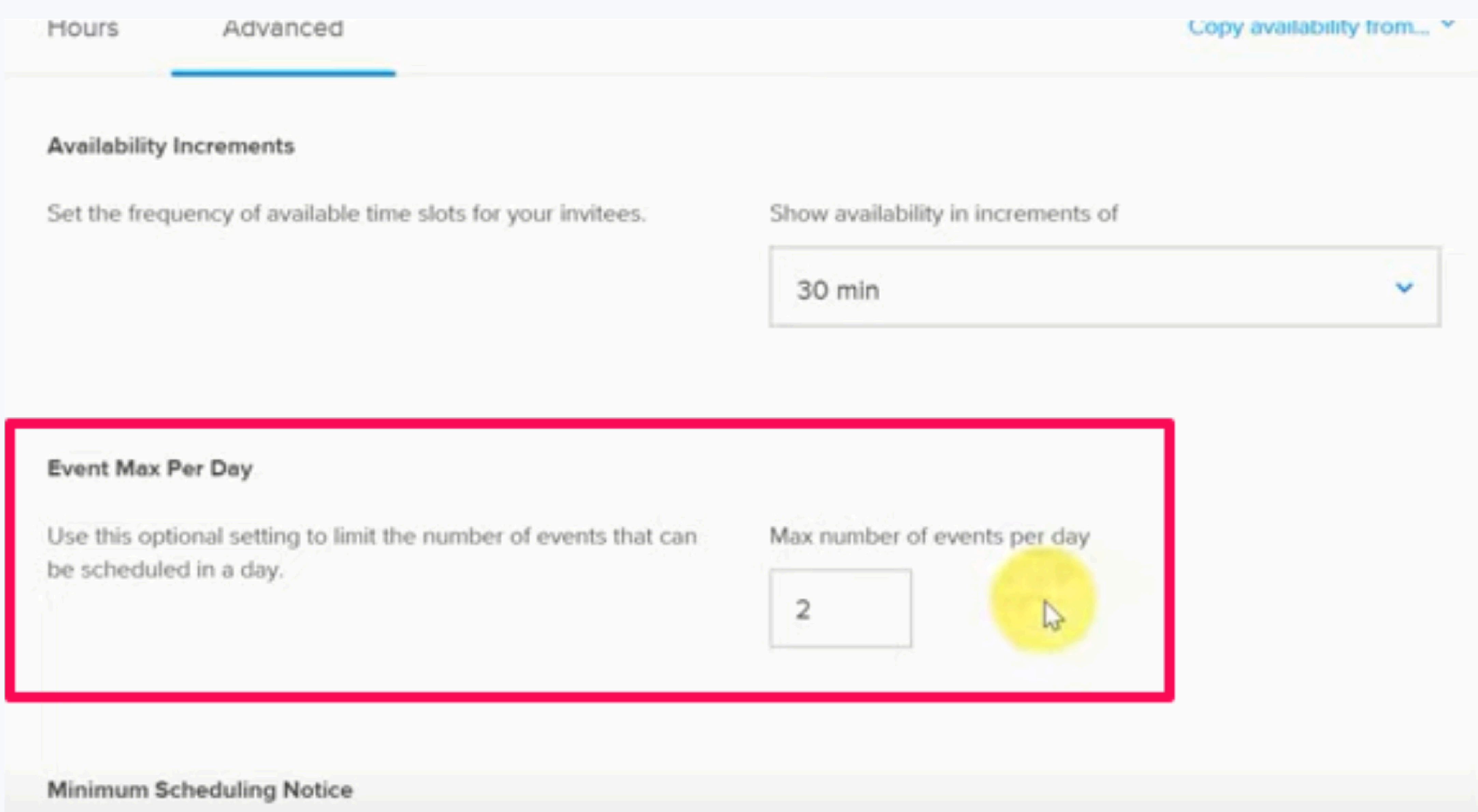
If you want to set the time limit on specific days, simply click on the date and set it up according to your preference.



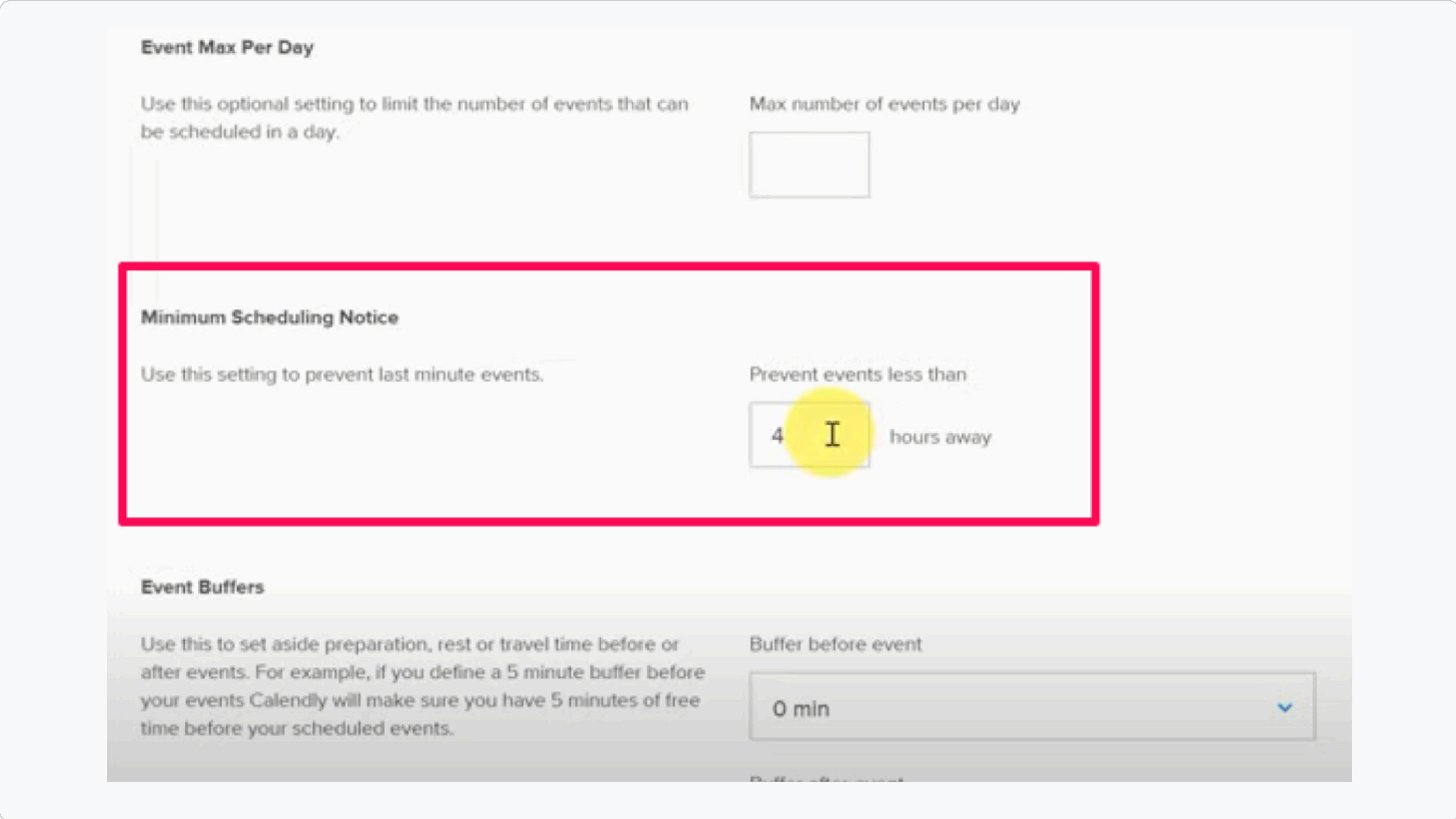
33 Now, navigate to the 'Advanced' tab, where you will find some other important details to consider. First, let's talk about availability increments. This determines how participants can book your time. Do you want them to be able to book you on an hourly basis, for example, at 1:00 p.m., 2:00 p.m., and 3:00 p.m.? Or would you like to offer 30-minute increments, such as 1:00 p.m., 1:30 p.m., 2:00 p.m., and 2:30 p.m.? You can make this change by selecting the desired option from the drop-down menu.



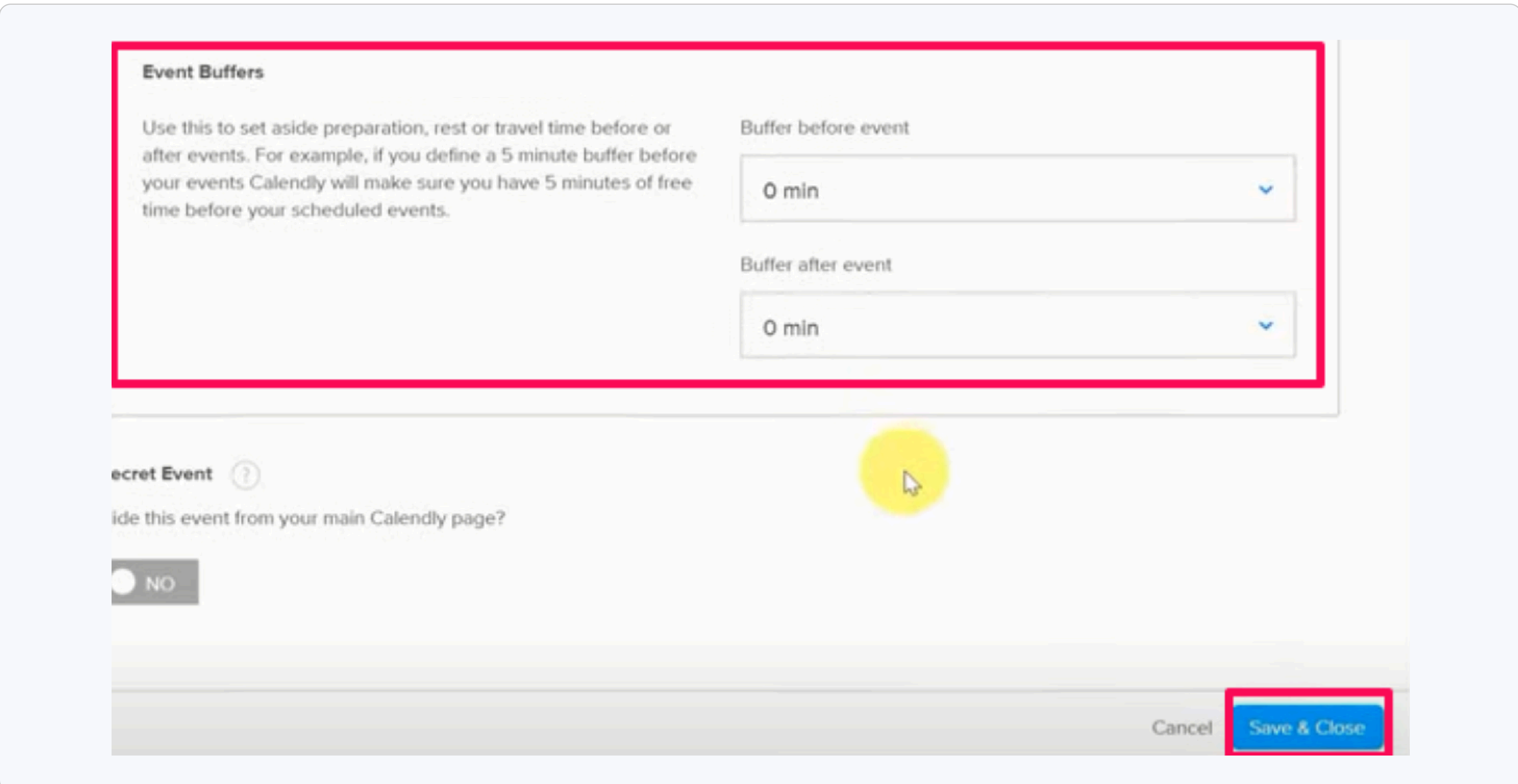
34 Next, let's talk about 'Event Max Per Day'. This setting determines how many people can book you for this particular event in a single day. If you don't want to set a limit, you can leave this field blank, and it will follow your other rules, such as the number of available hours.



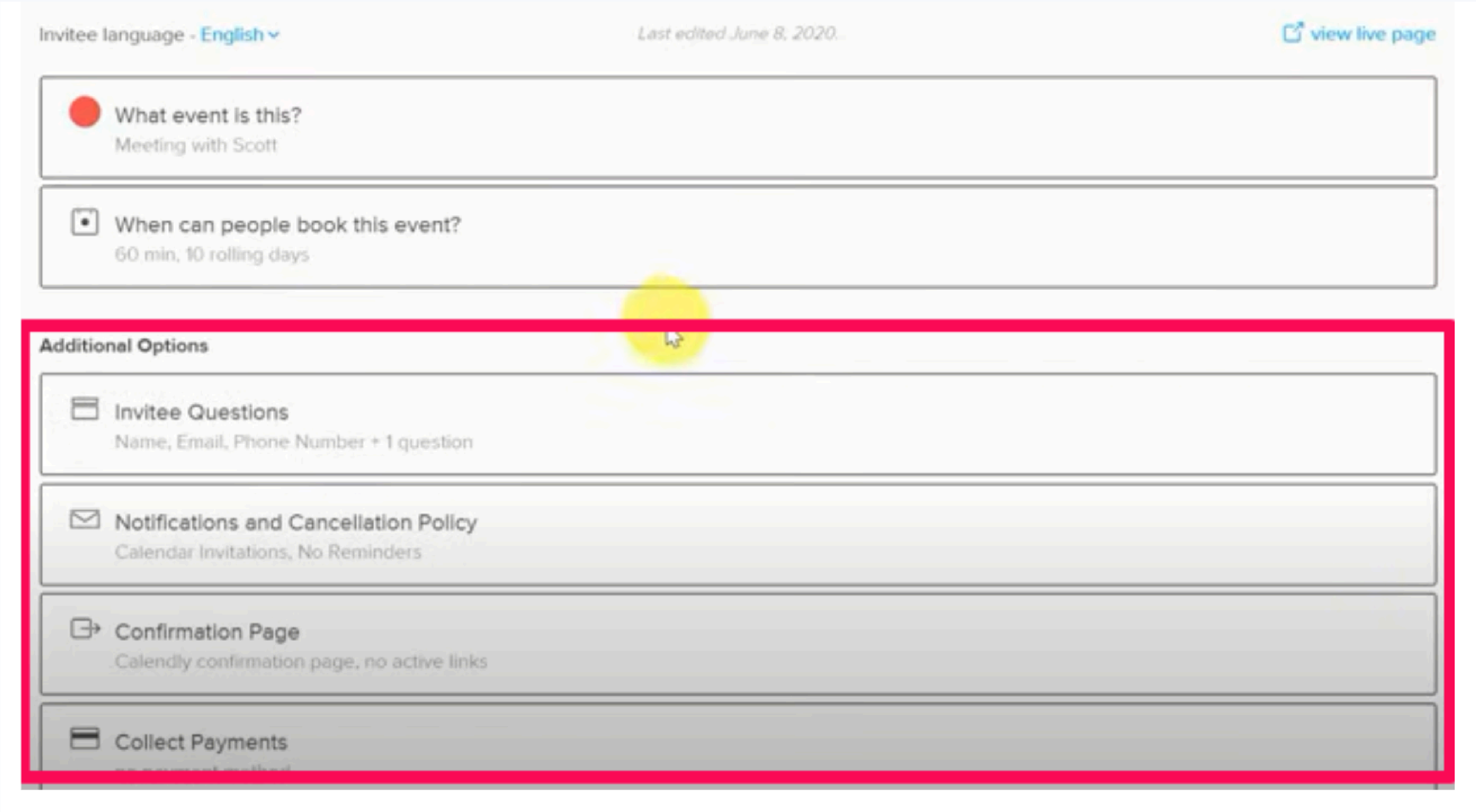
35 Now, let's discuss 'Minimum Scheduling Notice'. By default, this is set to 4 hours away, meaning that someone could book you as soon as four hours from now. However, if you need some time to prepare or want to send them a questionnaire, you can always adjust this setting to accommodate your needs.



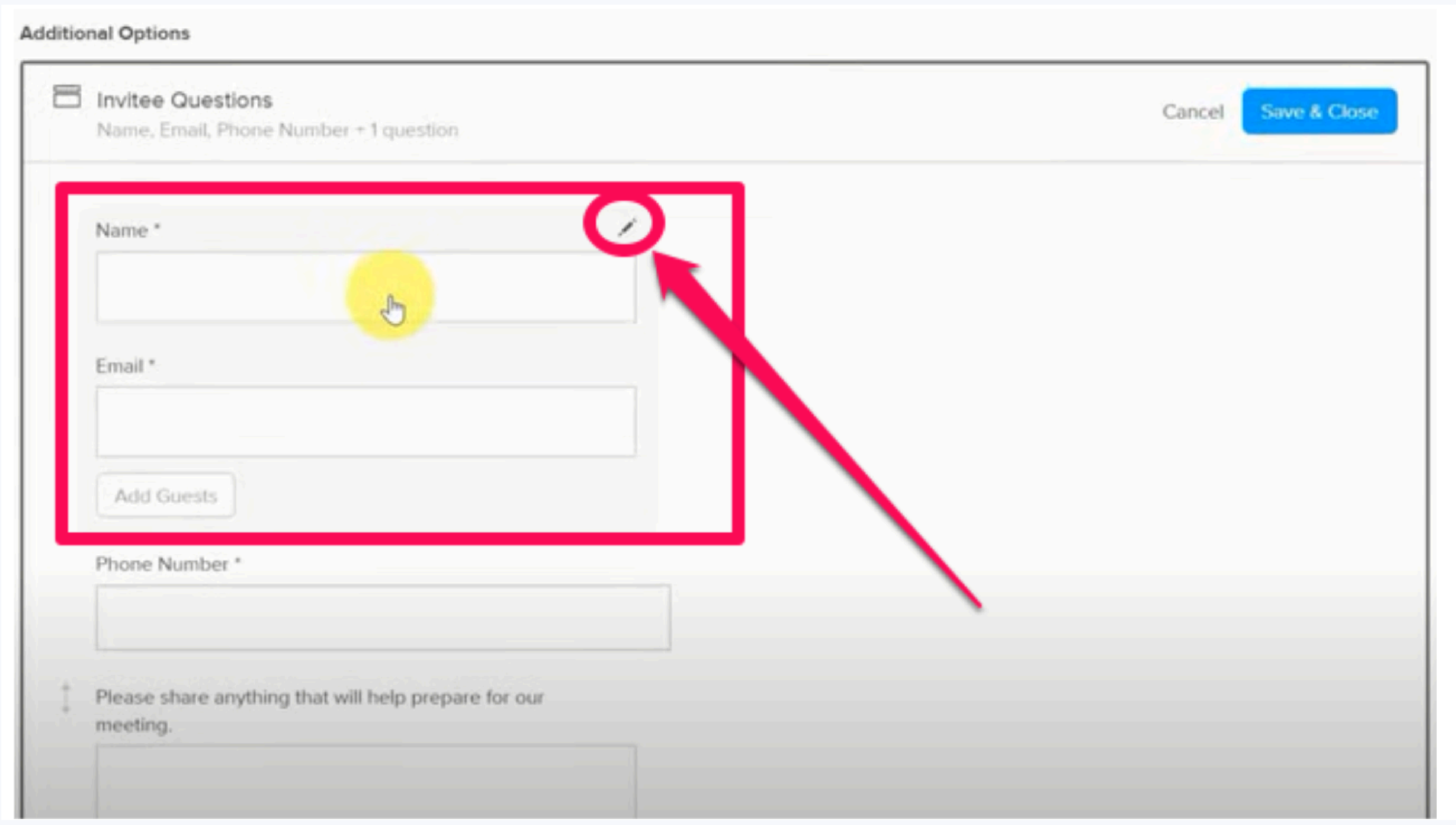
36 Finally, let's talk about 'Event Buffers'. This setting allows you to add a buffer time before and/or after an event, which can be very helpful if your meetings tend to run over time or if your clients tend to push meetings beyond their scheduled time. By adding a buffer, you can avoid running into your next meeting. Once you have made any necessary adjustments, click on 'Save & Close' to save your changes.



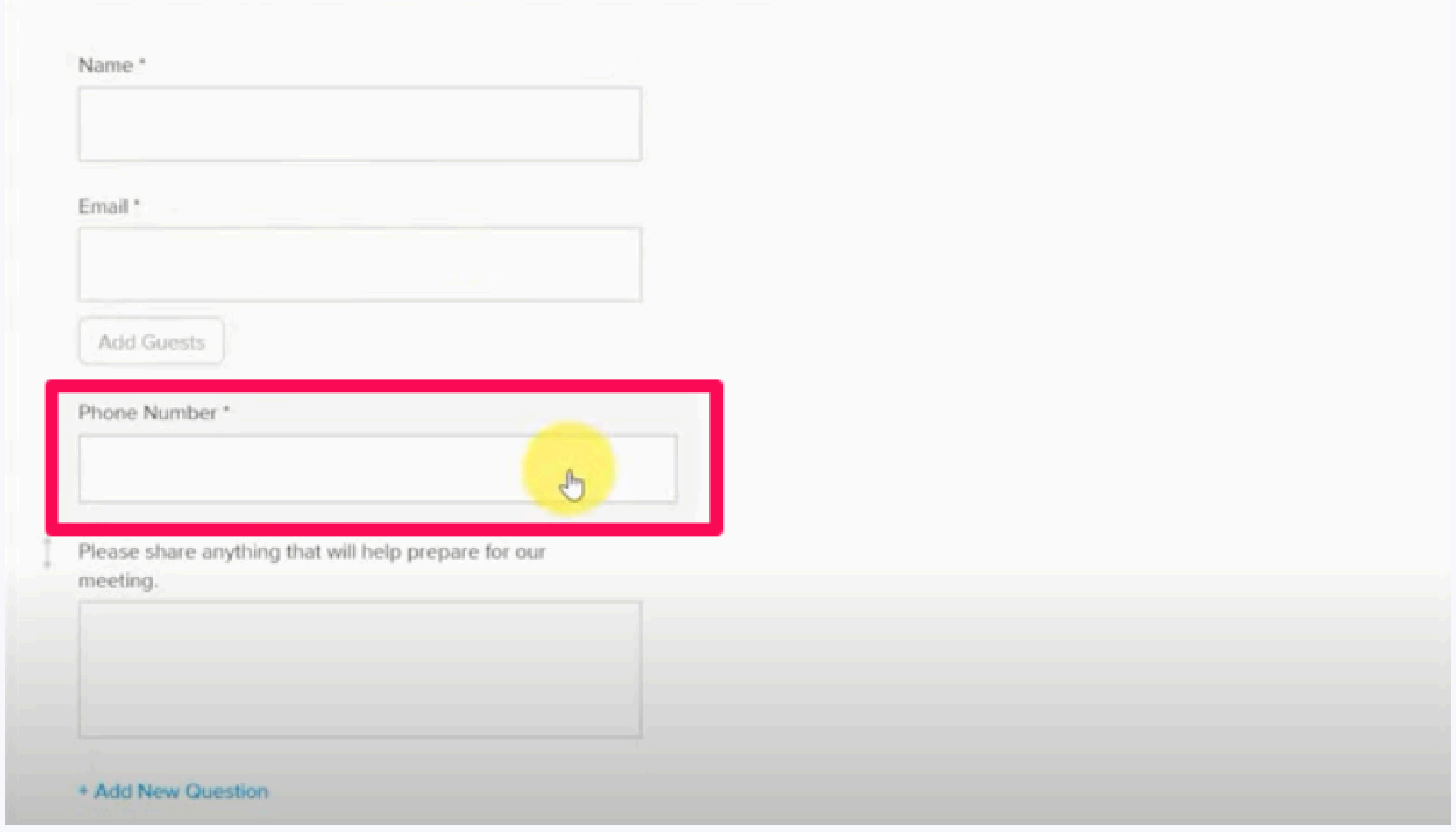
37 Next, let's move to the four 'Additional Options'. The first one is 'Invitee Questions'. Click on it to open it up.



38 Please note that the name and email fields are mandatory. To set up the 'Name Input' field, click on the gear icon and adjust the settings as needed. Once you're done, click 'Apply' to save the changes.

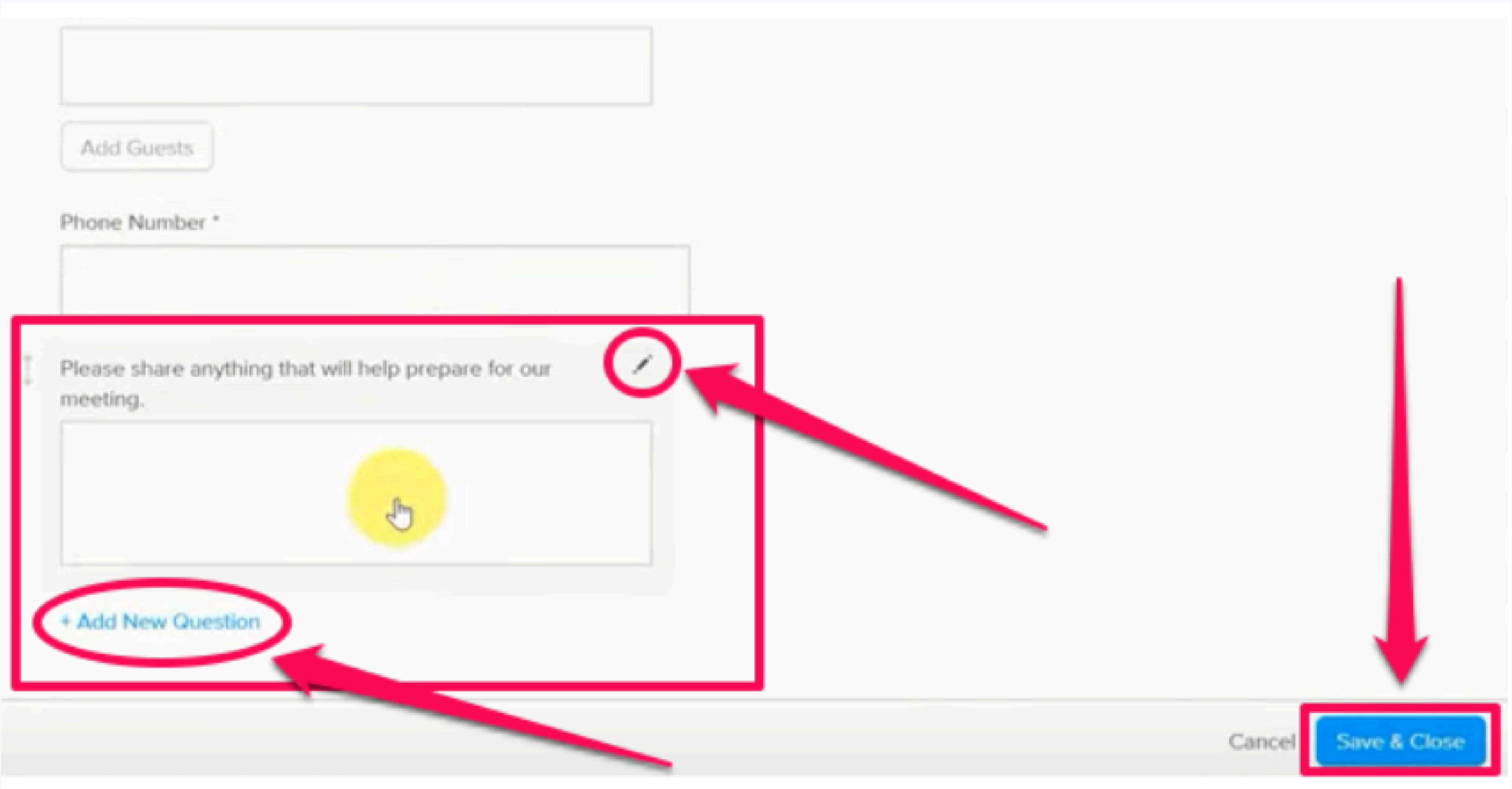


39 The next option is 'Phone Number'. As you may recall, we have set up the booking form to require guests to provide their phone number, as I need to call them. If you don't need this information, you can choose to remove this field. However, since we have previously made this choice, the 'Phone Number' field will be displayed by default.



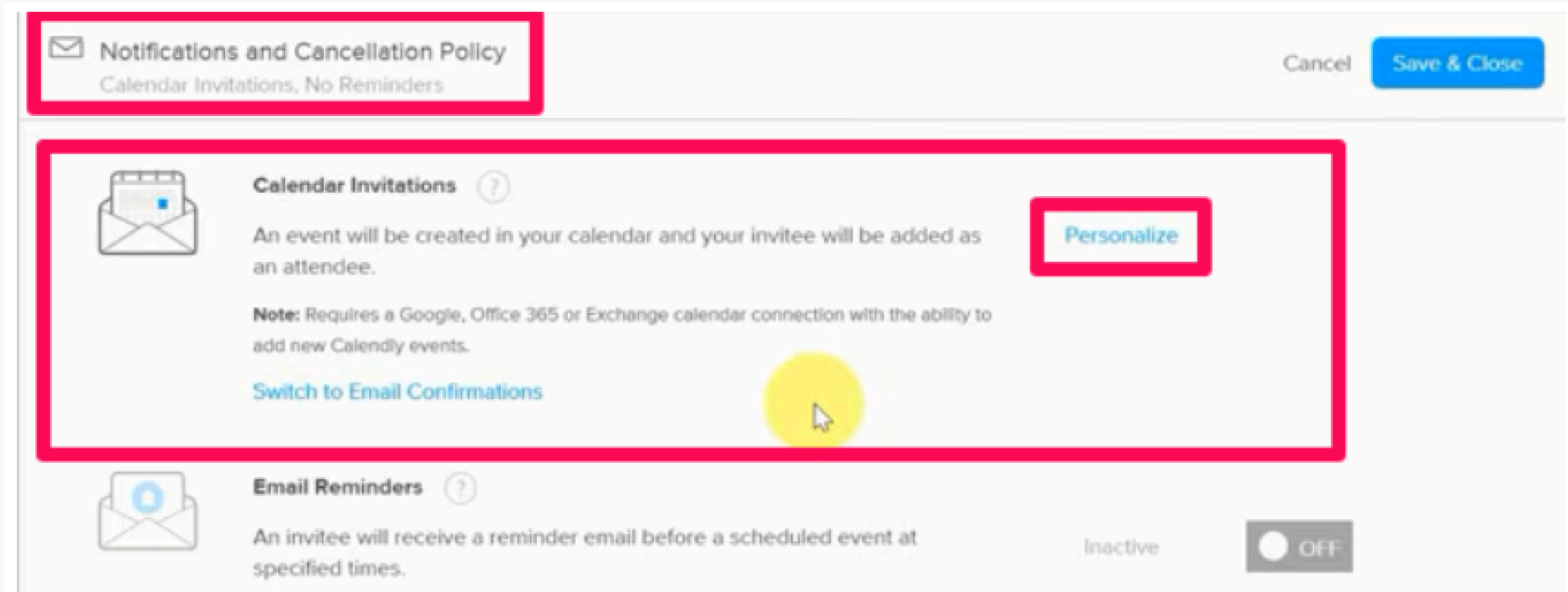
40 The last option here is an open comment field labeled 'Please share anything that will help prepare'. You can customize the text and the wording of this question as needed. If you don't need this field, you can simply delete it. Alternatively, you can add additional questions by clicking on 'Add New Question'.

If you want to ask some preliminary questions in advance, it can be helpful to gather more information and understand what your guests are looking for. You can add those questions here. Once you are done, click on 'Save & Close' to save your changes.

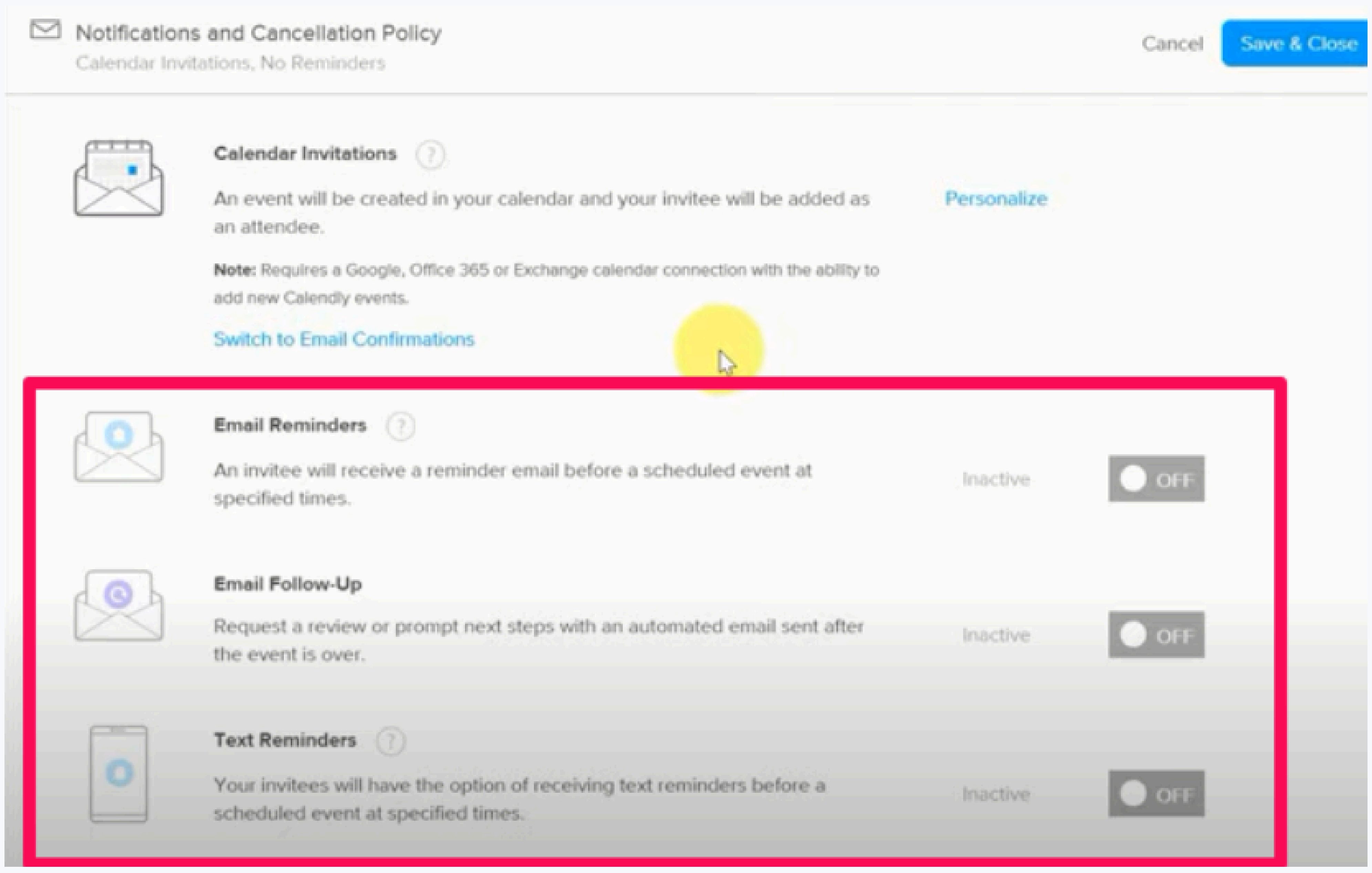


41 The next step is to configure the 'Notifications and Cancellation Policy'. You can choose how you want your events to appear on your guests' calendar and how you want the email reminders and notifications to be sent. You can customize the title and wording of the notifications to your preference. On the right-hand side of the screen, you can personalize the notifications and see how they will appear to your guests. You have the flexibility to modify these settings during the setup process.

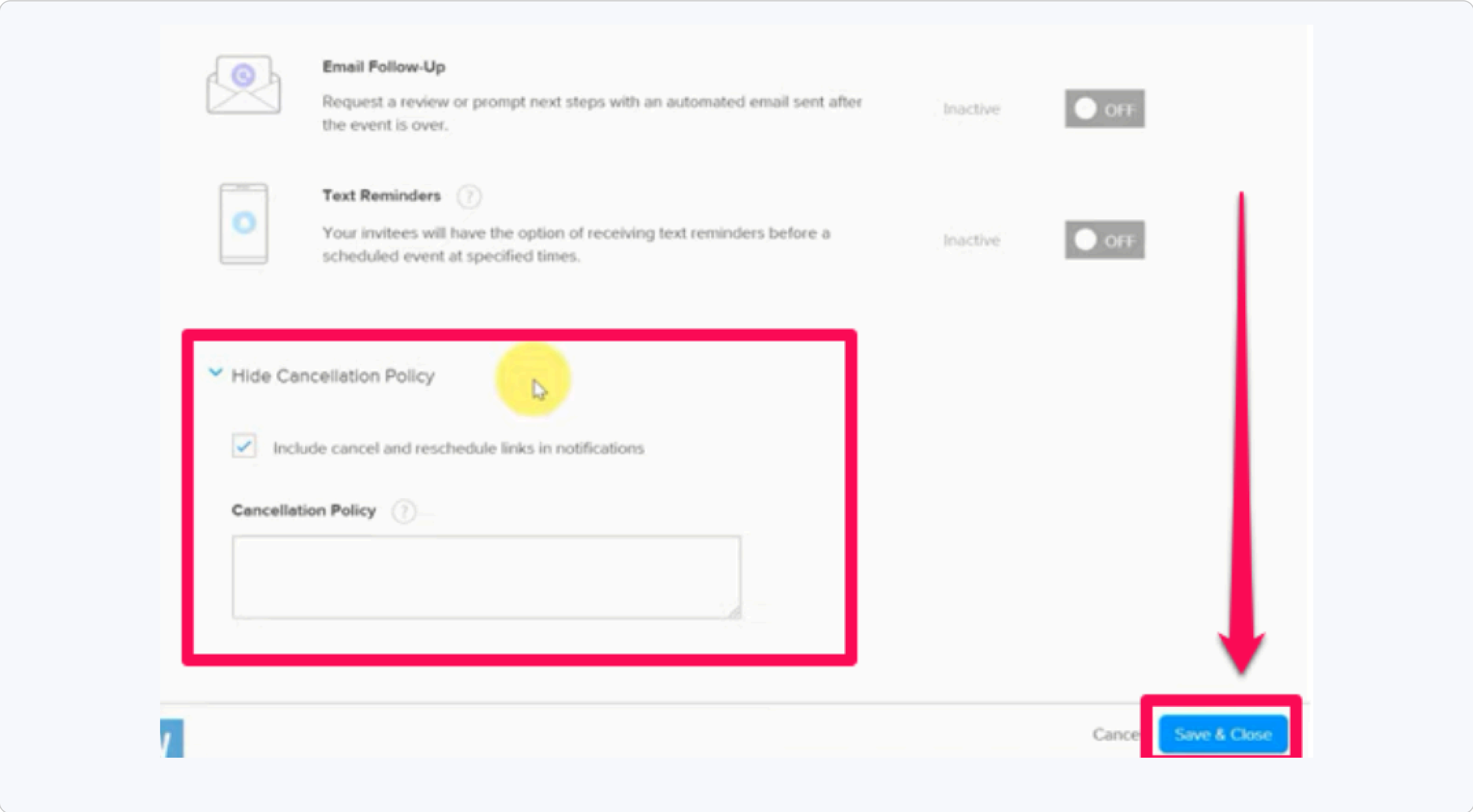
On the right-hand side, you can select "Personalize" and see how the event will appear to the individual receiving the invitation. You can customize the wording and appearance of email notifications and calendar invitations to suit your preferences as part of your setup.



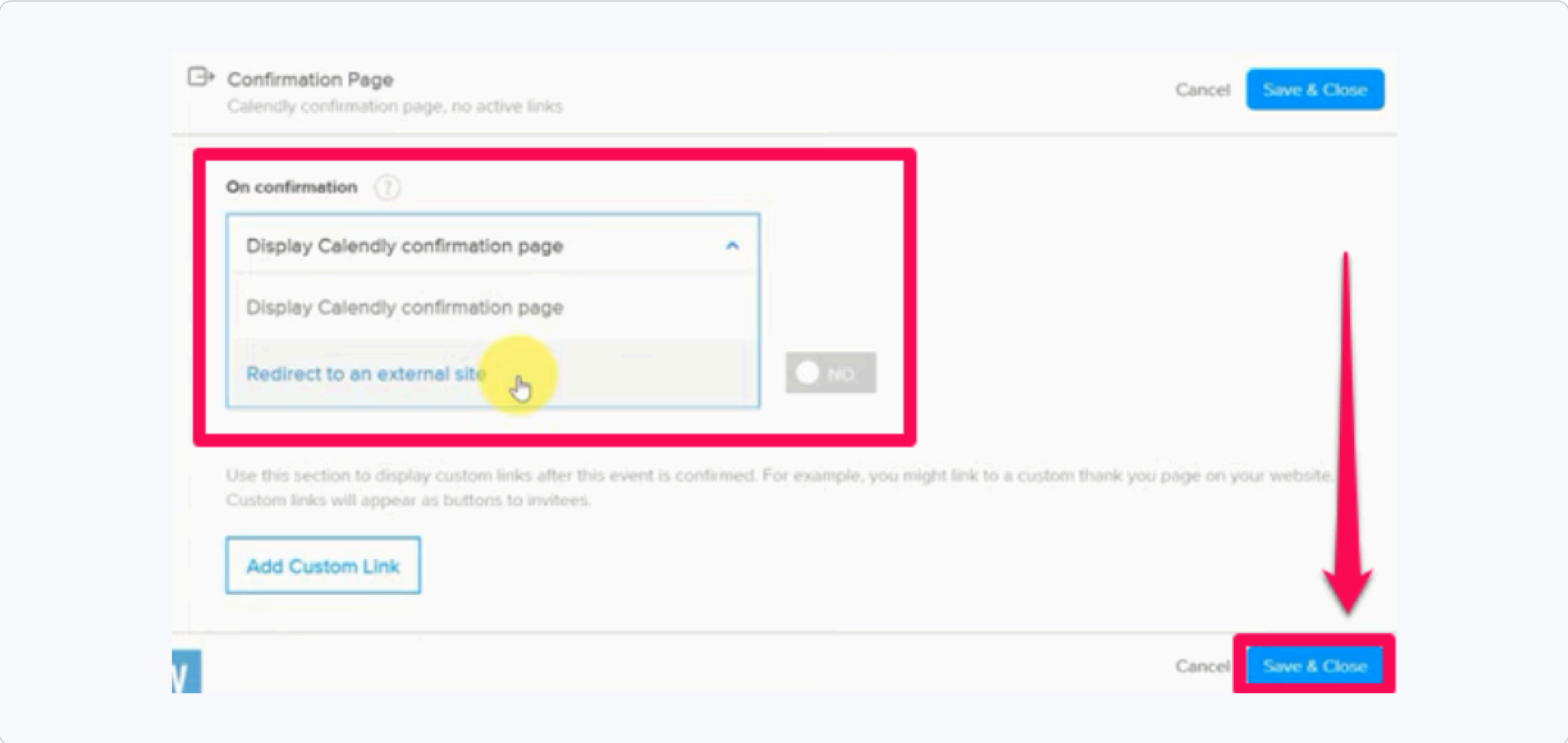
42 Now, down below is Email Reminders, Email Follow-up, and Text Reminders. By default, these are all set to off. But you can turn them on and make adjustments as you wish.



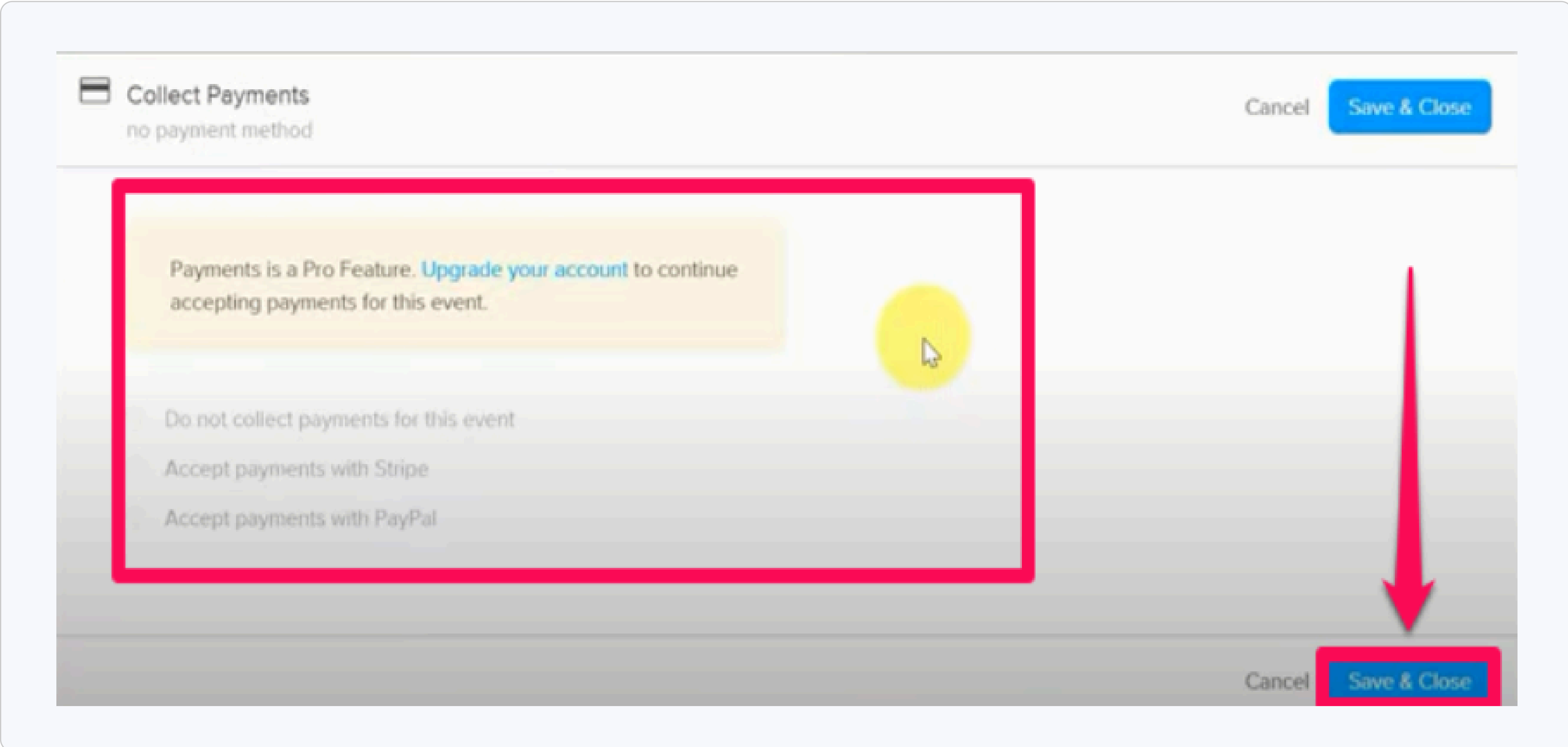
43 And, last thing is the 'Cancellation Policy'. So, if you want to include something like "You must notify me 24 hours in advance or else you will be charged the full amount or something to that effect, you can include your cancellation policy here. Otherwise, you can uncheck the box and not have anything show up as a part of that cancellation policy. Click 'Save & Close' to save the setting.



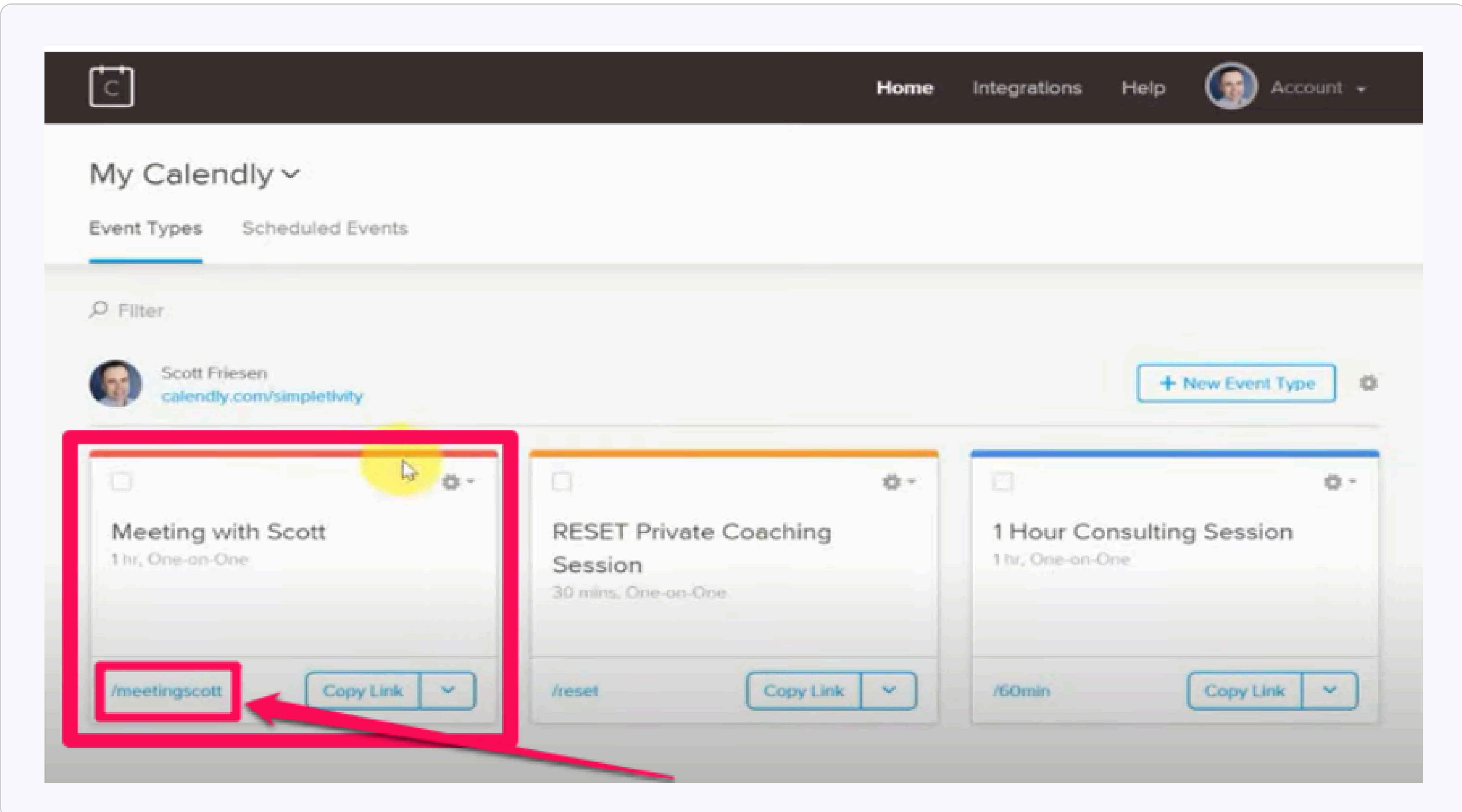
44 Next is the 'Confirmation Page'. By default, it's gonna show just a standard Calendly confirmation page. But, if you would like to send them somewhere specific, you can choose to redirect to an external site. Maybe you want to send them back to your website or to a social media page, or maybe you have a custom thank you page. You can include that here as a part of a custom link.



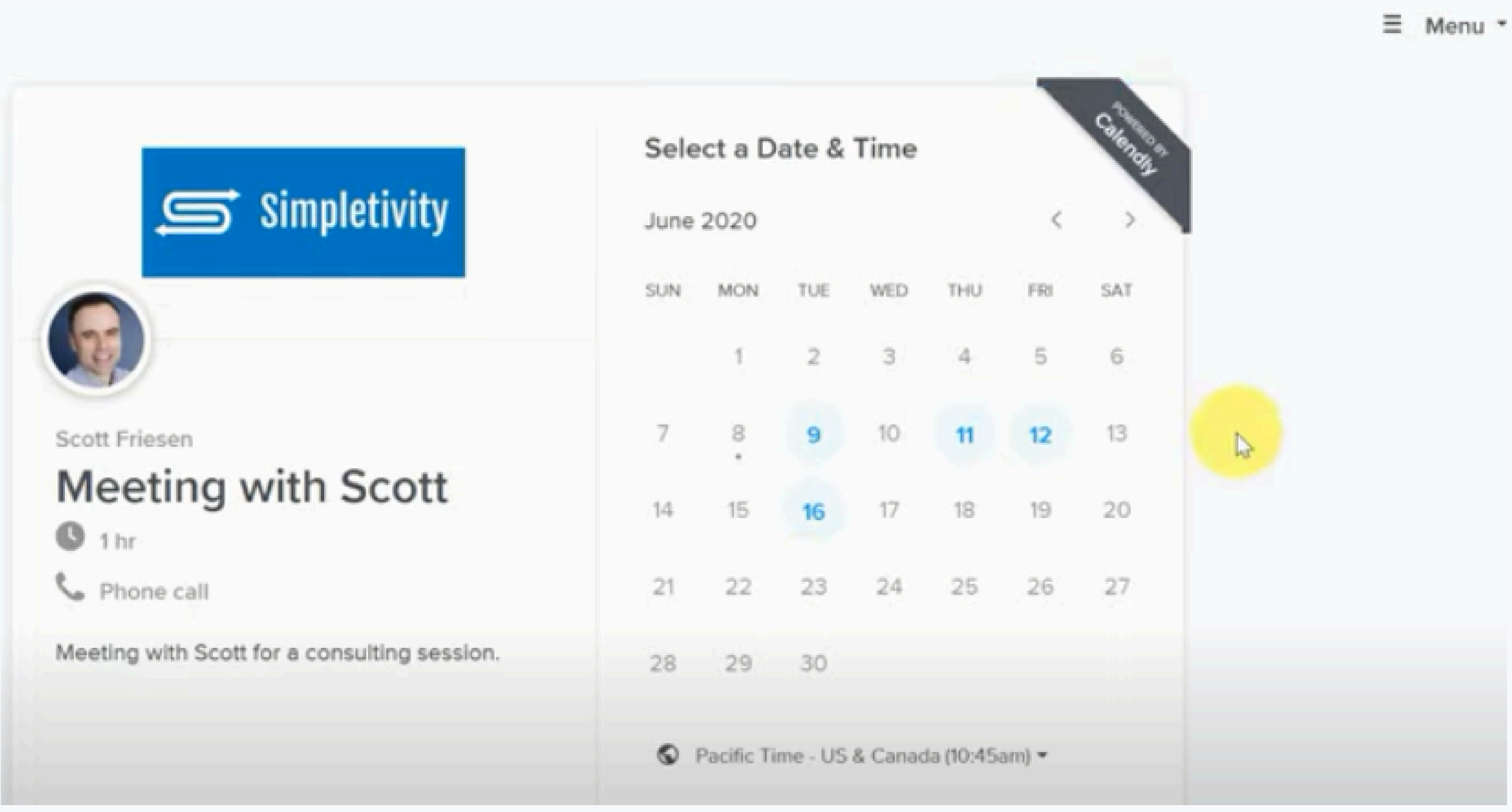
45 And then the last option that we have available to us has to do with payments. Now this isn't gonna be applicable to every user. And yes, you must have a pro account in order to use payments. But, if you want to require your users to pay you via PayPal or Stripe or some other method. You can do so here so that they have to pay prior to confirming that event. You can make that connection here within this window.



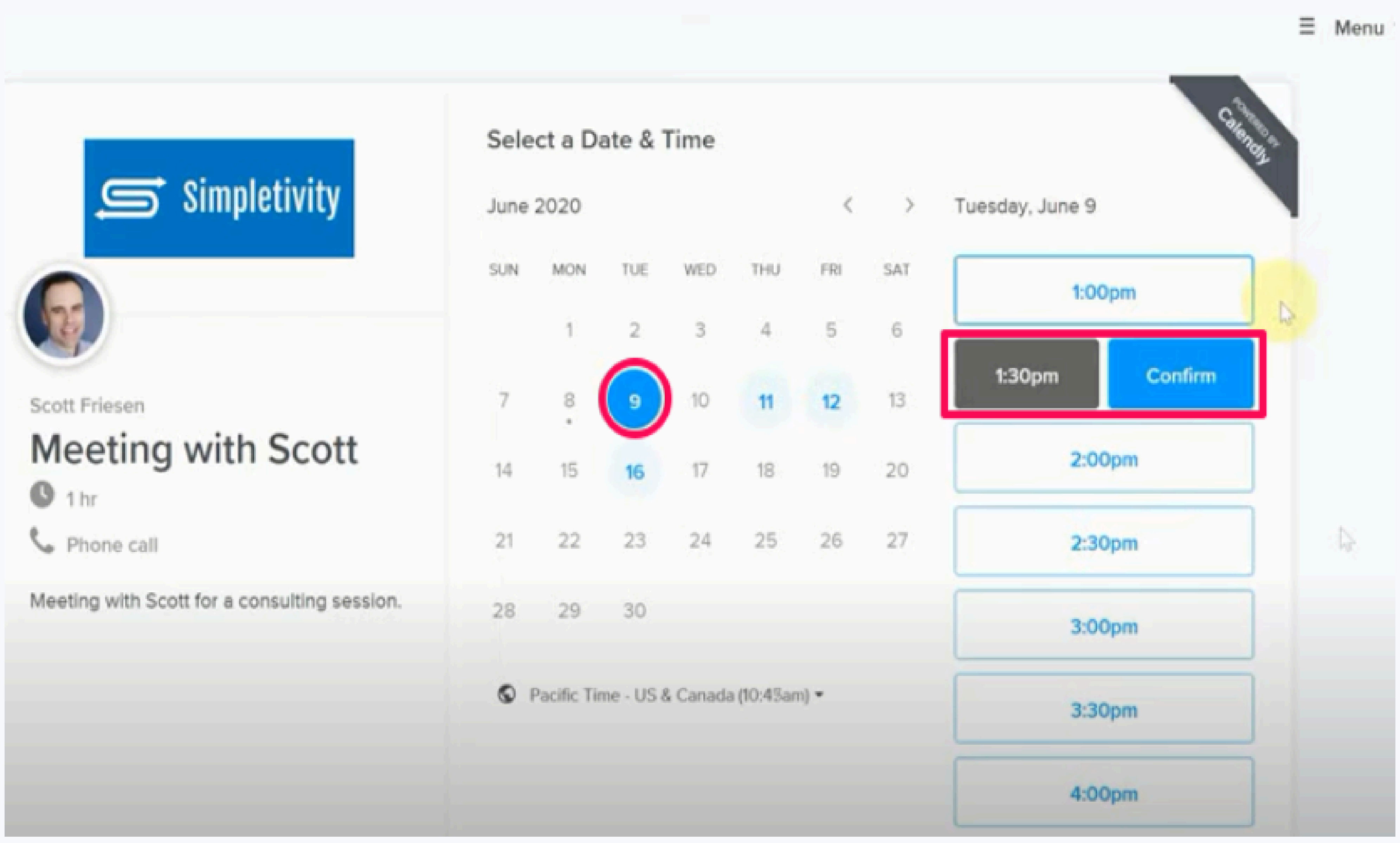
46 So, once you're done with the event type, go back to the home page.



47 When you click on the link, it will bring you to the meeting invitation where users can only book you on the available dates, which are highlighted in blue.



48 If a user clicks on the ninth, they will be able to see your availability for that day. They can choose any of the available time slots and confirm the booking to continue with the process.



And that showed you everything you need to know about Calendly!

How to Use Calendly

SCAN CALENDAR

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