Getting started with booking calendars

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The booking calendar is a simple tool that handles complex scheduling requirements.

It displays your availability to customers, allowing clients and leads to book time with you.

The basic features of booking calendars are laid out for you here. For more a more detailed guide to setting up and sharing a booking calendar, check out these articles:

- The Booking settings tab
- The Booking form tab
- The Customer notifications tab
- The Share tab

Set your availability

To access booking calendars, click on the **Booking calendars** icon on the left-hand side toolbar on the OnceHub homepage.

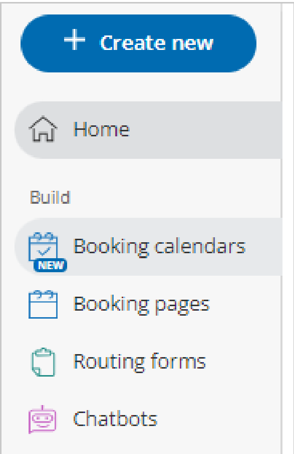

Figure 1: The booking calendar icon

You may have already configured your availability during onboarding. If you're satisfied with the rules you set for your availability, you can skip this. However, read on if you want to change your profile availability.

Every user can set their own availability, which OnceHub applies to all the booking calendars they own. You can adjust your availability settings by selecting your work days, available hours or timeslots, and override your recurring available hours for once-off engagements.

You can update your user availability in your profile by doing the following:

1. Select your profile picture or initials in the top right-hand corner, then select **Profile settings**. This will take you to the profile overview page.
2. On the left-hand side, click **Availability** icon (Figure 2)

3. Depending on the settings you wish to update, select **Scheduled meetings** or **Live engagements**.

4. Here you can set your availability. Remember to click **Save** when you're finished!

The booking calendar lobby

To access the booking calendar lobby, click **Booking calendars** on the left side of the page (Figure 3).

Here, you can see and access all of your existing booking calendars, create new booking calendars, and delete them.

By clicking on the three-dot menu at the end of a booking calendar's row, you can edit, duplicate, rename and delete it.

> **Note:**
>
> If you delete a booking calendar, it will also be removed from any chatbot, routing form, or booking hub that it is used in. You can see where the booking calendar is featured by hovering over the **Used in** column in the booking calendar lobby.

You can use the search bar at the top of the lobby to search through your existing booking calendars by their name or by using the booking calendar's share link. You can filter the results by the owner of the booking calendar.

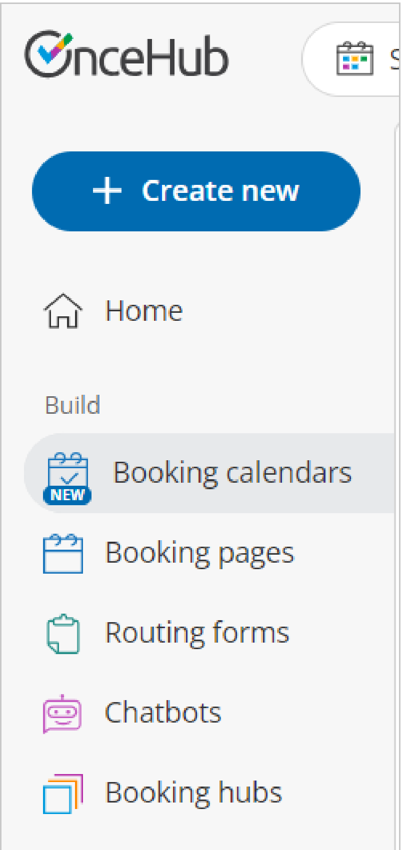

Figure 3: Accessing the booking calendars lobby

Create a new booking calendar

If you have no booking calendars yet, follow the directions below to create one.

1. First, click the **Booking calendar** icon on the left-hand side of any OnceHub page.
2. Click the **Create booking calendar** button in the middle of the booking calendars home page (Figure 4)
3. Enter the name you'd like to give the calendar, and click **Create**.
4. Fill in your booking settings, which are explained below.

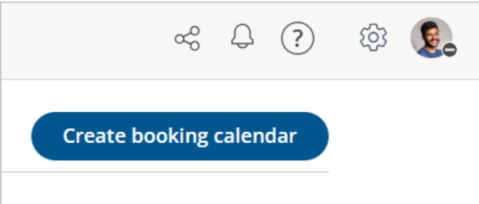

Figure 4: the Create booking calendar button

Settings

Meeting subject: This is the external name of your booking calendar, which your customer will see.

Meeting host: This is the host of the booking calendar. The host is the user who will receive bookings. There can be more than one host, as in a panel meeting, or you can choose for the meetings to be distributed among a team of the users in your account.

Duration: Choose the meeting's length from 15-60 minutes, or choose your own custom meeting duration.

Time slot spacing: Set the interval between available times. For example, 15-minute time slot increments may offer available times at 12:00, 12:15, 12:30, 12:45, etc.

Lead time: Set a custom time frame within which customers are unable schedule meetings with you. This is useful if, for example, you are offering a meeting which requires some time beforehand to prepare for.

Time frame limit: Set how far into the future your availability is shown to customers.

Buffer time: Set a buffer before the start and end of meetings. This is useful if you need time in between two meetings to prepare.

5. Once you're done, click **Save** to create your new booking calendar.

Reassigning the meeting host and rescheduling on behalf

Reassign the meeting host

Administrators can reassign the host of an upcoming meeting. If the host of an upcoming meeting is unavailable, a new host can be selected to take the meeting.

To reassign a meeting host, follow these steps:

1. On the activity stream, find the meeting in question
2. Beneath the title, click **Reassign**
3. A pop-up will open where you can select the new host of the meeting. Pick from the list, or click in the filter bar and type the name of the desired user.
    1. If the new host has multiple video conferencing option connected, including the original location, then you will be able to keep the same meeting location, or choose a new location from a list.

OR

2. If the new host's location settings differ from the original host (for example, if the original location is physical, but the new host is only available to meet on Zoom) you will be able to choose to offer a Zoom call to the customer. or have no location details displayed at all.

4. Once you have completed the **Review and confirm** page, click **Reassign** to finalize your changes.
5. The meeting is now reassigned. Your customer will be informed of the changes.

Reschedule a booking on behalf of someone else

If you or your customer is unable to make the original booking time, you can reschedule the booking yourself on your customer's behalf. This can be done even if the original meeting time has already passed.

To reschedule a meeting, follow these steps:

1. Find the booking in question in the activity stream.
2. Click **Reschedule**
3. A pop-up will appear, allowing you to choose between rescheduling the meeting yourself, or asking your customer to reschedule. Both of these options cancel the original meeting.
4. On selecting either option, you will be prompted to provide a reason for the rescheduling which will be shared with your customer.
    1. Selecting **Reschedule on behalf of the customer** will direct you to the relevant calendar, and display availability for rescheduling the meeting.
    2. Selecting **Ask the customer** will provide them with the relevant calendar, and allow them to choose a new time for the meeting.
5. Once you have selected a new time, click **Reschedule.** The confirmation will be shared with your customer.

Note:

You can only reschedule a meeting if you are the host or owner of the meeting, or if you are an admin.

Using CAPTCHA with booking calendars

You can add an invisible CAPTCHA to your booking calendars, which will not be displayed to site visitors, except for bots and suspicious users.

Enabling CAPTCHA adds a strictly necessary cookie named **cf_chl_prog**. This cookie is created and used by Cloudflare to execute Javascript or CAPTCHA challenges, identifying trusted web traffic for your pages. It does not identify the person receiving the cookie on the web application, track them, or store their personal identification details in any way. It is never used beyond the scope of the CAPTCHA challenge.

As an account administrator, you can enable CAPTCHA doing the following:

1. Go to your account settings (the gear icon at the top right of the screen.)
2. Click **Security and compliance**.
3. On the left, click **CAPTCHA**.

4. Click the **Enable CAPTCHA** checkbox.

Done! Now all of your booking calendars will contain a hidden CAPTCHA, which repels bots and suspicious users before they can access booking information.

Booking calendar troubleshooting

Your booking calendar is not displaying available times

If your booking calendar is not displaying any available times, there could be a few reasons:

- The connection to your calendar has failed.
  - Troubleshooting Microsoft 365 calendar connection
  - Troubleshooting iCloud calendar connection
  - Troubleshooting Google calendar connection
  - Troubleshooting Microsoft Exchange calendar connection
- All host/s have been deleted. If the host of a booking calendar, or all members of a team hosting a booking calendar have been deleted, then your booking calendar will not display any available times to your customers.
- The host does not have a seat.
- You have not configured your availability correctly.

