Getting started with booking calendars

Last Modified on Dec 4, 2024

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

Customizing your availability and meeting location

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 availability settings at the profile level, or to customize availability and location for a specific booking calendar. You can adjust your **Weekly working hours** for recurring availability, like your average work week, or you can add **Date-specific overrides** that don't repeat themselves; useful if you're taking a week off, but don't want to de-activate your booking calendar.

You can adjust your availability settings by selecting the days in your working week, available hours or timeslots, different location options, and by overriding your recurring available hours for once-off engagements.

How can I use these features?

- **Set hybrid meeting locations**: Rather than having separate booking calendars, each with a different location, you can adjust your single booking calendar to offer multiple locations. You can set it to reflect the days in the week you work from the office and the days you're working from home.
  - Video conferencing: Offers your customer the option to meet with you through the video conferencing apps you have connected. For example, if you have connected to both Zoom and Google Meet, then these will be offered to your customers.
  - Phone: Allows you to call your customer on their phone number. If you offer this option, then the customer will be prompted to provide their phone number in the booking form, after selecting a meeting time. You will find the customer's phone number in booking notification emails.
  - Physical location: Offers your customer a physical location to meet. When you select this option, you will be prompted to add an address, which will be displayed to the customer when they are selecting a time with you.
- **Book time off**: By using a **Date-specific override**, you can block off a week for your summer holiday, but keep your booking calendar active to keep receiving bookings outside of that time.
- **Get specific**: We provide ways of getting very specific with how you can offer availability. You can customize your availability and location for individual days, and even have multiple time slots throughout a single day which you can customize.

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Availability and meeting locations can be set on the profile level, or they can be customized for an individual booking calendar. Read on to see the difference:

Profile availability

Every user can set their own availability and meeting locations on a profile level, which OnceHub applies to all the booking calendars they own by default. When creating a booking calendar, you can select that its availability and meeting locations are taken from the host's profile settings. This is your standard availability and will usually reflect your normal working hours.

You can update this in your profile by clicking the profile picture in the top right-hand corner, and clicking **Scheduled meeting availability**.

Booking calendar-level availability

Alternatively, you can adjust the availability and meeting locations of a specific booking calendar. These settings take precedence over your profile-level availability. This option is useful if you have a type of meeting that is different to your general availability. For example, you have a VIP client who works in a different time zone to you. You're happy to extend your hours for them, but don't want to allow customers in your time zone to meet with you outside of your regular working hours. You can create a booking calendar just for this client, and adjust your hours accordingly.

Customizing availability and meeting location for a single host

When creating a booking calendar, you are able to customize the hours of availability and location options displayed to your customer. If the booking calendar has a single host, you can choose between the following two options:

- Retrieve from user profile settings
- Customize availability and locations

If you select **Retrieve from user profile settings,** the booking calendar will show your customer the available hours and the video conferencing options available per the user's profile. To set your availability and meeting location for your profile, click on the profile picture in the top right-hand corner, and then **Scheduled meeting availability**. You can then follow the numbered steps below.

When you select **Customize availability and locations** you will be able to edit your recurring availability, or add a date-specific override for once-off availability and location changes. Changing settings here applies only to the specific booking calendar you are working on, and allows you to override location and availability settings as set in your user profile settings. You can extend your hours of availability, or reduce them; you can also use it to add a location.

To customize your availability and meeting location, follow these steps:

1. Click between **Recurring availability** and **Date-specific overrides** to view the existing availability configuration.
   - **Recurring availability** means that changes you make to a day's availability and location will recur weekly.
   - **Date-specific overrides** are changes that only show for the specific day/s that you have set, and will not repeat.
2. Click the **Edit** button to make changes to this configuration.

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- Under the heading **Working hours**, you can change the times you are available for scheduling.
- Under the heading **Meeting location**, you can change the location you wish to display to a customer.

3. If you want to apply this configuration to other days of the week, hover over the **Copy to** button at the right of each day row, and then select each day you would like to apply these rules to, then click **Apply**.
4. If you want to add additional time slots for a day, click the plus button at the end of the day row. This will add an extra slot for you to customize. You can add as many additional slots as you need.
5. Click Apply to save your changes.

Customizing availability and meeting location for a team-hosted calendar

If the booking calendar is hosted by a team, you are given the following customization options:

- Retrieve from user profile settings
- Customize availability and locations
  - For **all** hosts
  - For **some** hosts

When you select **Retrieve from user profile settings,** the booking calendar will show your customer the available hours and video conferencing options available per the user's profile.

You are also given the option to edit the availability for an entire team, or just for members of the team. Adjusting availability and location for all users would be useful if, for example, you had a team that catered to in-person meetings by default, rather than video conferencing. Using that option, you could add a physical or phone location for the entire team.

Adjusting ability for some users would be useful if, for example, two members of your team were on leave for the week. You want to block their availability for the duration, so that no meetings are mistakenly made with them, but keep the booking calendar active for the rest of the team.

Once you have selected whether you would like to add custom settings for all users or for some users, follow these steps to edit availability:

If you select some users, you will need to select the user whose availability and location settings you would like to customize before continuing.

1. Click between **Recurring availability** and **Date-specific overrides** to view the existing availability
2. Click the **Edit** button to make changes in the pop-up menu
   - Under the heading **Working hours**, you can change the times you are available for scheduling.
   - Under the heading **Meeting location**, you can change the location you wish to display to a customer.
3. If you want to apply this configuration to other days of the week, hover over the **Copy to** button at the right of each day row, and then select each day you would like to apply these rules to, then click **Apply**.
4. If you want to add additional time slots for a day, click the plus button at the end of the day row. This will add an extra slot for you to customize. You can add as many additional slots as you need.
5. Click **Apply** to save these changes.

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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.

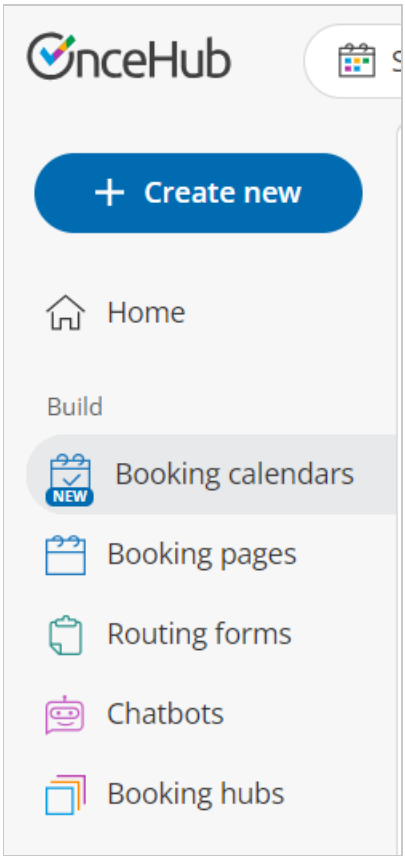

Figure 3: Accessing the booking calendars lobby

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.

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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.

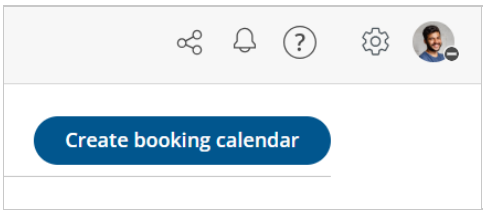

Figure 4: the Create booking calendar button

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

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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.

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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.

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