The Booking settings tab

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Booking calendars allow you to cater for complex scheduling situations with simple settings.

Read on to learn more about the scheduling settings available in booking calendars.

Availability

You should have set up your availability during onboarding, but if you need to tweak your settings, you can learn how to do that in this article. Here, you can adjust your availability by selecting your work days, available hours or timeslots, and override your recurring available hours for once-off engagements.

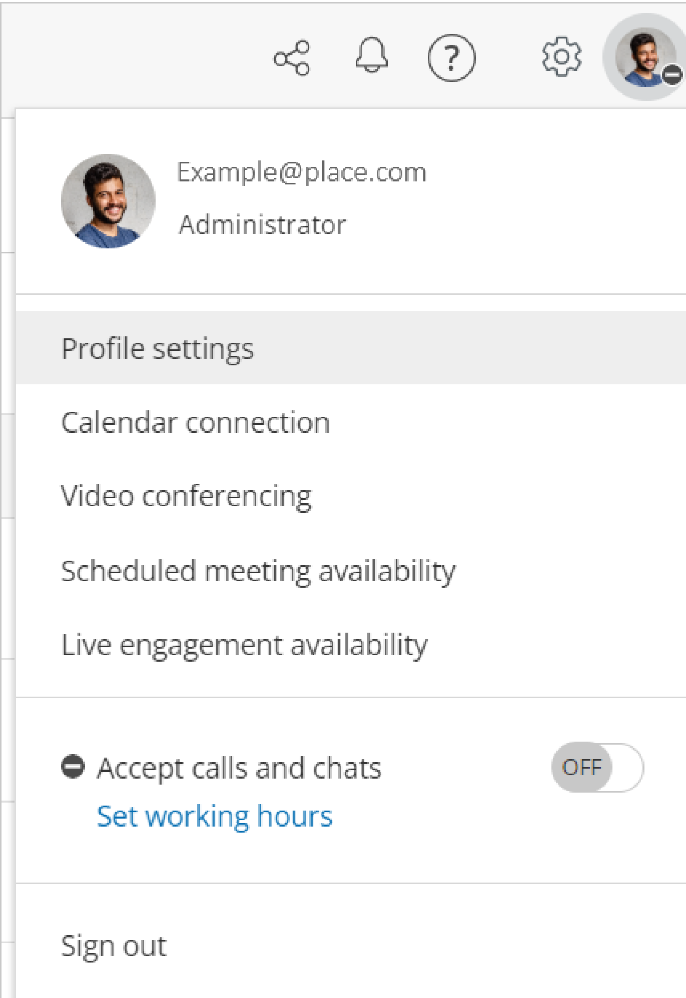

Figure 1: Profile settings

Read on below in the section **Customizing your availability and meeting location** to learn how to change these settings for a specific booking calendar.

Meeting subject and duration

The same meeting subject will be visible to you and your customer, so name your calendar something appropriate and relevant to the meeting. This is the only name that you and your customers will see, so be sure to clearly communicate the nature of the meetings scheduled by this calendar. (Figure 2)

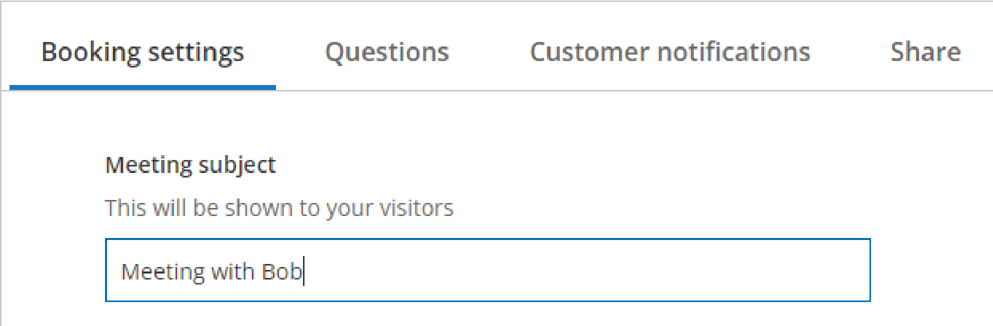

Figure 2: Naming your meeting subject

Duration

Choose the meeting's length from 15-60 minutes, or enter your own custom meeting duration. For additional time slot settings, click **Time slot settings** at the bottom of the screen.

Individual scheduling

To set an individual meeting host, select one user from the **Attendees** dropdown menu. This means that the user selected will be the sole owner of the meeting. (Figure 3)

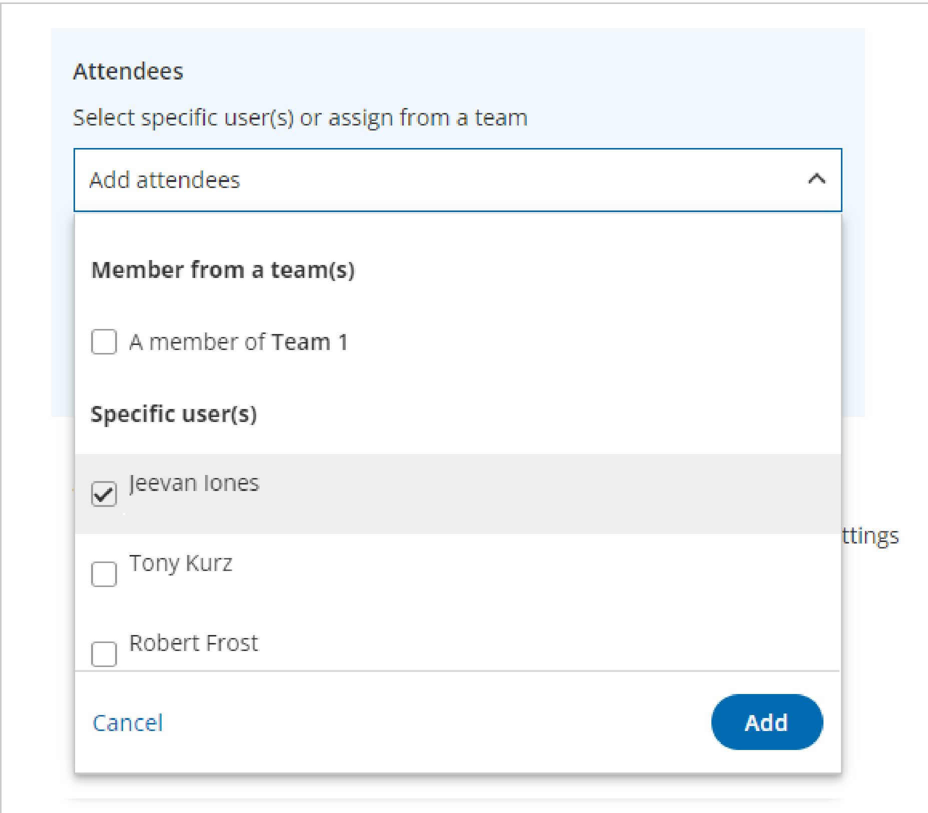

Figure 3: A meeting hosted by an individual user

Scheduling with multiple users

There are two types of team-scheduled meetings: **Multiple host** and **distributed**, which are detailed below.

Multiple host meeting

This setup allows your customers are able to book a time to meet with multiple team members simultaneously. (Figure 4)

To create a meeting hosted by a team of users, also termed a panel meeting, you must select multiple hosts. Click on the **Attendees** dropdown menu, and select the team members you would like to have in the meeting, and click **Add** to add them. Note that only users with active licenses will have their availability displayed.

> **Note:**
>
> You can also select a team of users as opposed to individual users. Read on below to learn how to make a team!

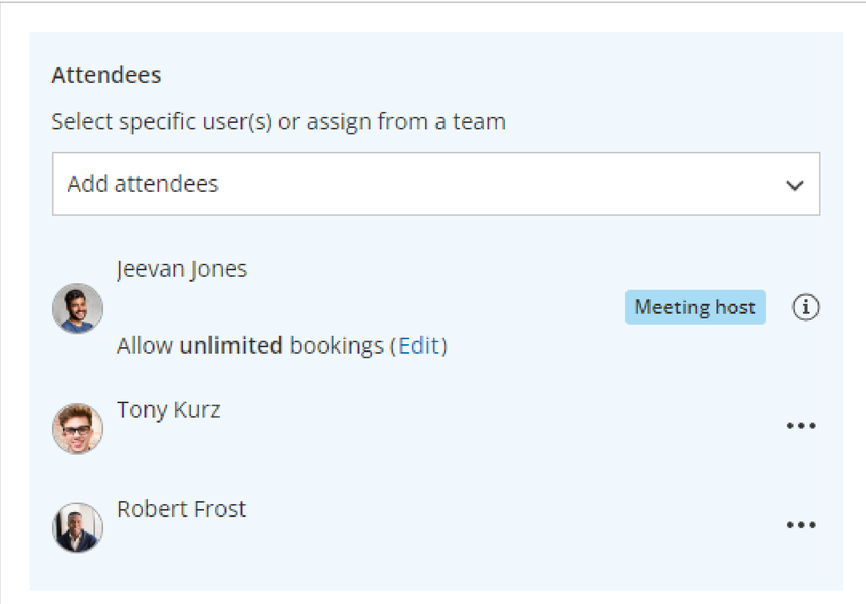

Figure 4: A meeting with multiple hosts

Distributed meeting

This setup uses dynamic distribution to select a meeting host from a team of members.

In order to setup a distributed meeting, you will first need to make a team.

If you have already grouped users into a team, you can skip this part.

To make a team:

> **Note:**
>
> Making a team is only available to OnceHub accounts which have multiple users registered.

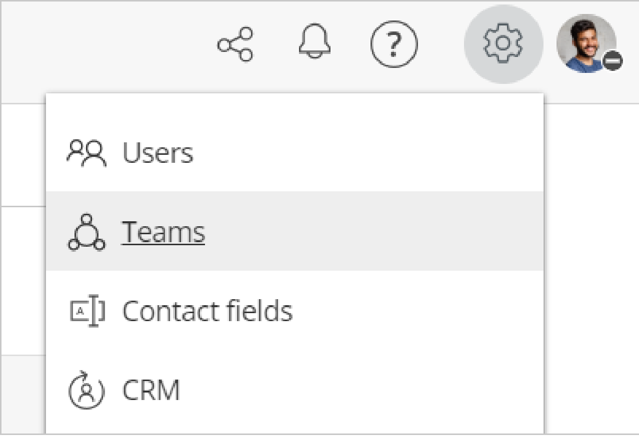

Figure 5: The Teams option under account settings

1. Click the gear icon on the top right of the OnceHub screen
2. Select **Teams** (Figure 5)
3. On the Teams page, select **Add team** to create a new team
4. Name your team
5. Select the users you would like on the team from the dropdown menu
6. Click **Add** and then **Save** to finalize the creation of your new team

Now that you have made a team, you can create a distributed meeting.

Back on the booking calendar creation page, select the **Attendees** dropdown menu. At the top of the list, under the heading **Member from a team(s)**, select the option **A member of [your team name]**, then click **Add**. This will create bookings among any available members of that team, and offers a choice between two distribution methods. Click **Change** (Figure 6) to choose between the distribution options which are described below.

- Using **any available team member** displays every user in the team's availability to the customer, and allows them to choose a time most convenient for themselves, maximizing the availability offered.
- Using **Round robin (equal distribution)** distributes bookings among your team with a priority that all members of the team will have equal opportunities for meetings. This prioritizes a fair distribution among your team, but can result in less availability being shown to visitors.

When using **Any available team member** for distribution, you can select **Manage** next to **priority and booking limit** (Figure 6) which will bring up a menu that allows you to select the priority of each team member. Increasing someone's priority level will mean that they will be selected over other potential hosts who have the same availability but lower priority.

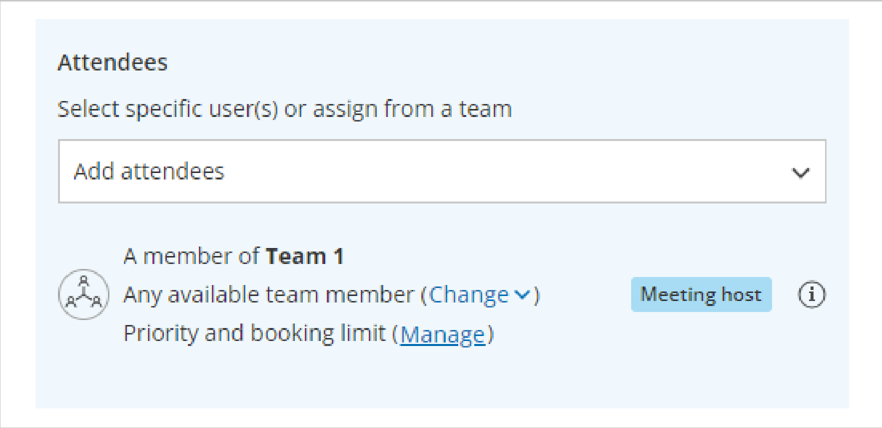

Figure 6: A meeting hosted by a team

Managing booking limits

You can set rules which manage the workload of a team or individual users by setting a limit to the amount of bookings that can be made with a user or a team.

To create or edit booking limits, you have to be in the booking calendar builder, on the **Booking settings** tab.

For meetings with an individual host

Follow these steps to manage booking limits in a booking calendar with an individual host:

1. Below an individual meeting host's name, click **Edit** below the host's name
2. Add a number to indicate the maximum amount of bookings they will be able to take, and then select whether that applies per day, week, or month
3. Click **Apply** to finalize the settings

For meetings hosted by a team

Follow these steps to manage booking limits in a booking calendar hosted by a team:

1. Click **Manage** next to **Priority and booking limit**, or just **Booking limit** if the meeting is distributed using round robin
2. On the pop-up, select the checkbox for the host whose availability you would like to edit.
    1. If you'd like to apply these limits to all members, select the checkboxes for each relevant member.
3. Add a number to indicate the maximum amount of bookings they will be able to take, and then select whether that applies per day, week, or month
4. Click **Apply** to finalize the settings

Customizing your availability and meeting location

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.

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. This is useful, for example, if you are sharing the booking calendar with a high-value client who you're happy to extend your hours for.

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

1. In the booking calendar set-up, under the Availability and location heading, select **Customize availability and location for this booking calendar only**.
2. 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.
3. Click the **Edit** button to make changes to this configuration.
    - 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. The location options are:
        - Video conferencing: Offers the customer to meet with you through the video conferencing apps you have connected to. For example, if you have connected to both Zoom and Google Meet, then these will be offered to your customers.
        - 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.
        - 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.
4. If you want to apply this configuration to other days of the week, hover over the **Copy to** button (Figure 7) at the right of each day row, and then select each day you would like to apply these rules to, then click **Apply**.
5. If you want to add additional time slots for a day, click the plus button (Figure 7) 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.

6. Click Apply to save your changes.

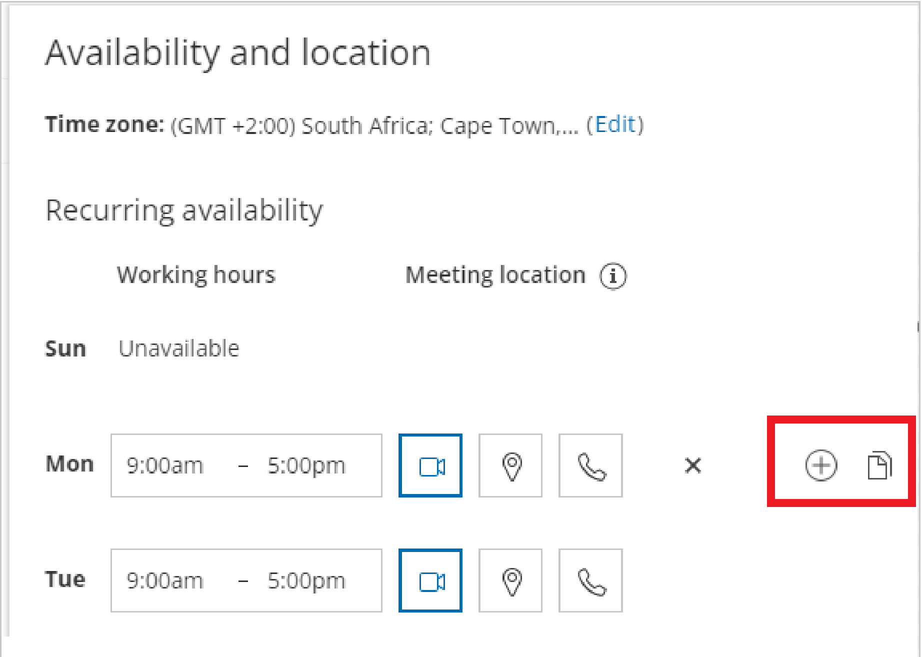

*Figure 7: Customizing your availability and location, with the **additional time slot** and **copy to** buttons highlighted.*

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** attendees
  - For **some** attendees

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. The location options are:
     - Video conferencing: Offers the customer to meet with you through the video conferencing apps you have connected to. For example, if you have connected to both Zoom and Google Meet, then these will be offered to your customers.
     - 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.
     - 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.
3. If you want to apply this configuration to other days of the week, hover over the **Copy to** button (Figure 7) 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 (Figure 7) 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.

Time slot settings

There are five options for customizing the time slots of meetings.

- **Duration:** Choose the meeting's length from 15-60 minutes, or enter your own custom meeting duration.
- **Time slot spacing:** Sets 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. Choose between the default time slots, or add a custom time by clicking **Custom** at the bottom of the drop down menu, and adding your own value (Note: you can only space time slots in multiples of 5)
- **Lead time:** Set a custom time frame within which customers are unable to schedule meetings with you. This is useful if, for example, you are offering a meeting which requires some time beforehand to prepare for. Select the number and unit of time measurement from the dropdown menu to configure lead time.
- **Time frame limit:** Set how far into the future your availability is shown to customers. This is useful if you don't want customers to book meetings so far in advance that the meeting is forgotten about. Select the number and unit of time measurement to configure the time frame limit.
- **Buffer time:** Set a buffer before the start and end of meetings. This setting is useful if you need time in between two meetings. Select the number and unit of time measurement to configure the buffer time.

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