

Optimizing the Phone Booking Experience [New]

Phone Bookings happen through conversation, unlike online bookings made via a Booking Link or website. For phone-first businesses, streamlining data collection is essential to maintain a natural conversation flow, reduce booking friction, prevent early drop-offs, and allow for error-free scheduling without interrupting callers for complex details like email addresses.

By following these recommended configurations and tips, you can make scheduling **faster, smoother, and more intuitive** for your callers.

Recommended Setup

For an efficient Phone Booking workflow, it is recommended to follow the steps below to **bypass email collection** and **rely entirely on SMS notifications**:

Step 1: Bypassing the Email Requirement:

To allow the booking to proceed without requiring the guest to provide an email address during the call:

1. Navigate to the **Email question** configuration within your Booking Form.
2. Make sure that **Do not ask for email address when bookings are made via phone booking** setting is enabled.
3. Click **Save** to confirm the changes.

Step 2: Capturing Phone Numbers for SMS:

To capture the guest's mobile number for SMS communication:

1. **Access** your Booking Form settings and locate the **Add Questions** pane.
2. **Drag and drop** the **Phone** question onto your form.
3. **Select** the **Contact details and SMS (requires consent)** option in the question's settings to capture the mobile phone number necessary for all follow-up communication.
4. Click **Save** to confirm the changes.

Step 3: Enabling SMS Notifications:

To ensure guests receive updates directly on their mobile devices:

1. Go to the **Notifications** tab of your Booking Calendar.
2. Scroll down to the **Guest Notifications** section.
3. **Enable** all the **SMS notification** checkboxes for each stage of the booking lifecycle, such as **Meeting Scheduled** and **Meeting Reminder**.

NOTE: Maintain Sufficient SMS Credits: You must maintain an active SMS credit balance to ensure

these updates are delivered. Without sufficient credits, notifications will fail, leaving your guests with no record of their booking details.

4. Click **Save** to confirm the changes.

Tips to Keep Your Phone Booking Experience Quick and Simple

When setting up your **Booking Calendars** and **Booking Hubs for Phone Booking**, aim to collect only the essential information quickly and efficiently. Follow these tips to keep phone bookings quick, clear, and caller-friendly.

- **Personalize Your Welcome Message:** Customize the **Phone Booking** greeting to set a professional and welcoming tone for your guests.
- **Use Short, Free-Text Questions:** Keep questions simple and concise to avoid confusing callers or slowing down the booking process.
- **Limit the Number of Questions:** Focus on what's essential. We recommend asking no more than three questions to keep the conversation focused.
- **Simplify Booking Hubs:** Reduce the number of Booking Calendars in your Hub to prevent overwhelming callers with too many choices.
- **Use Clear Meeting Subjects:** Provide brief, descriptive meeting titles so guests can easily select the right option through the phone menu.
