



Calendar Booking

Calendar booking comes in handy for the customer to book a meeting almost instantly. It allows customers to see when the support agents are available and enables them to schedule a meeting or call independently.

For example, Travis has just purchased a software from Zylker and wants to schedule a *Product Demo* to gain in-depth knowledge of its features. He mails the support team enquiring about the suitable time to have the product demo scheduled. Now, Travis has to patiently wait for the confirmation from the support team. Various questions pops in his head like, what if they didn't get my email? What if my email goes unnoticed? What if they schedule the meeting when I am busy?

To avoid all these, by using Calendar Booking, a customer can choose the appropriate time for the meeting based on their availability, enter the required details and voila! The meeting is booked. In case the customer is not available at the time of the meeting, he can either reschedule or cancel the booking. This can help the customer bypass the series of calls or emails made to the support team and independently book a meeting with the respective User or Team.

Once the setup is completed, a meeting URL is generated that can be shared with the customers allowing them to book a meeting. Calendar booking can be categorized into two. They are as follows:

- Team Booking
- User Booking

Availability

Permission Required

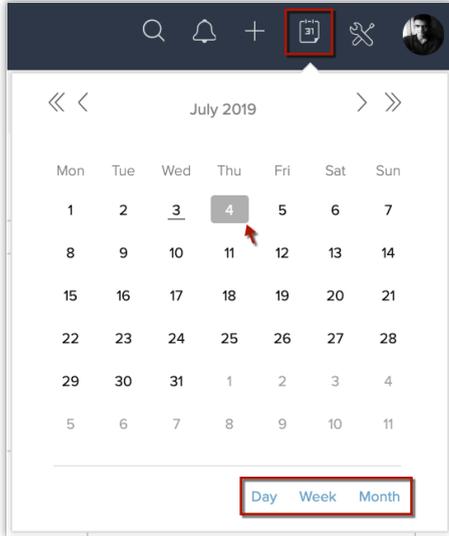
Users with permission to Manage Calendar Booking can create Team Booking and users with permission to create a Meeting or Call can create User Booking.

[Check Feature Availability and Limits](#)

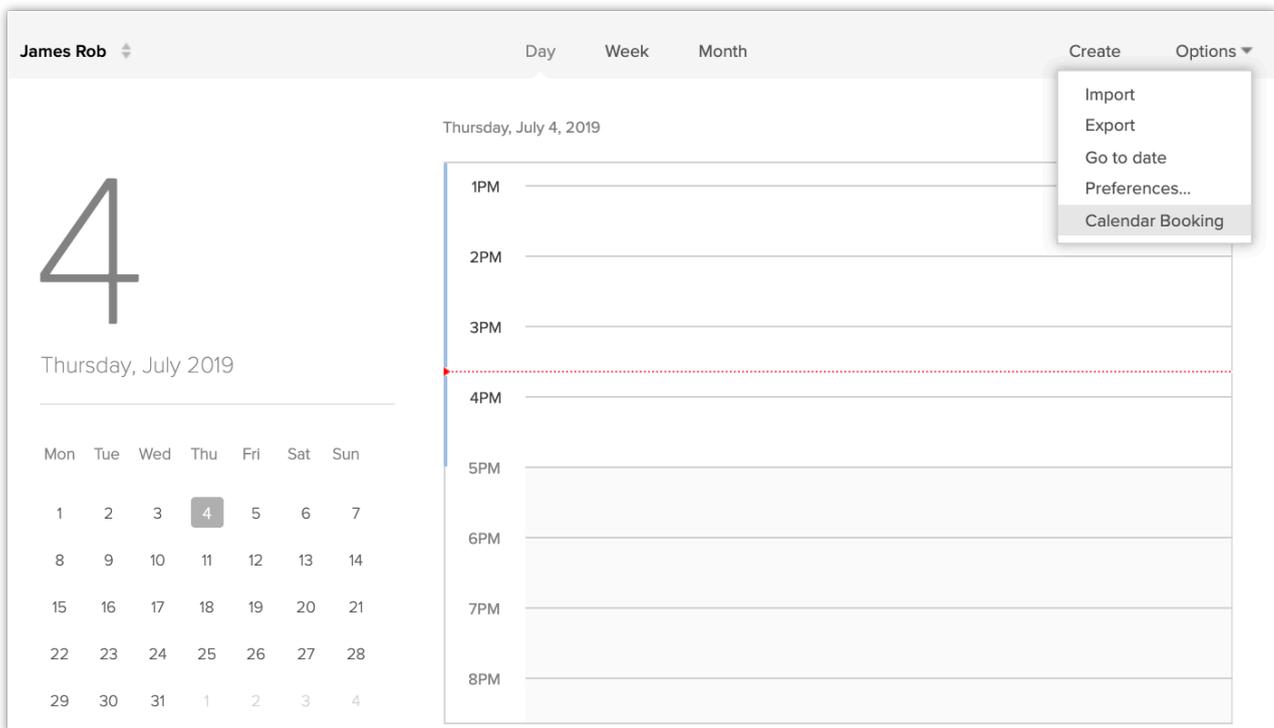
Setting up Calendar Booking

To set up calendar booking

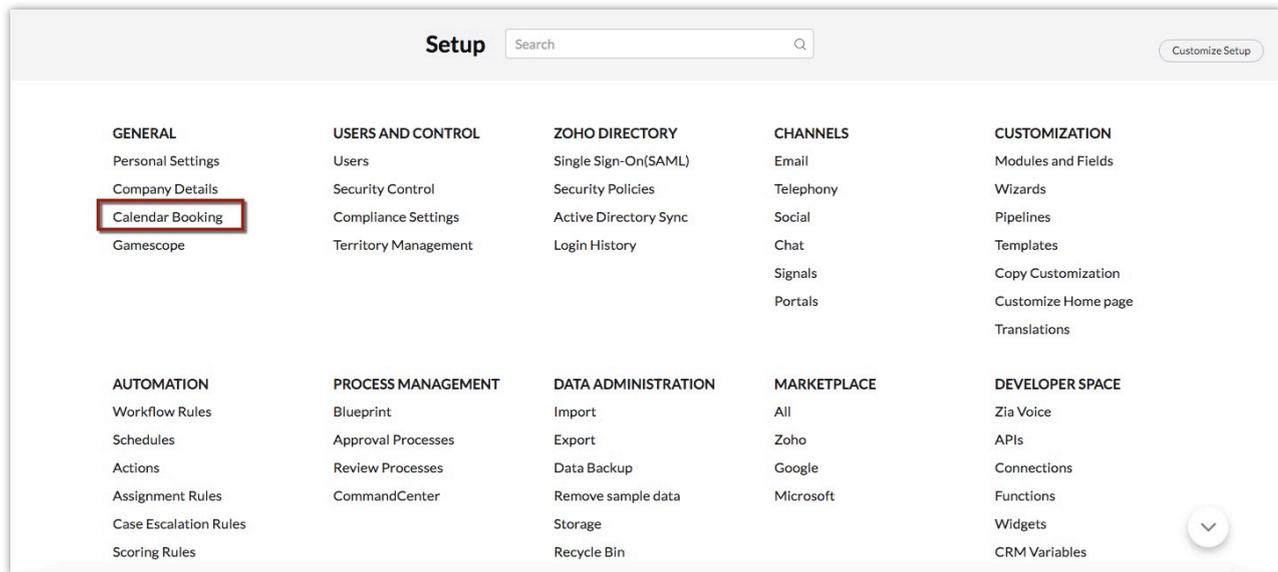
1. Log in to Zoho CRM.
2. Go to **Calendar** and select a date or click **Day**, **Week**, or **Month**.



3. Click **Options** and choose **Calendar Booking** from the drop-down list.



Alternatively, you can also go to **Setup > General > Calendar Booking**.

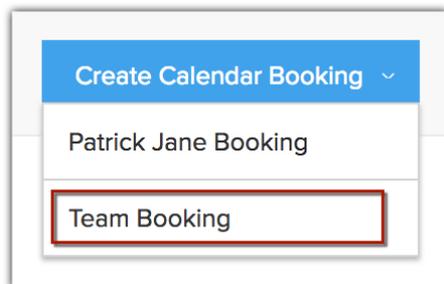


4. In the *Manage calendar booking* page click **Create Calendar Booking** and do the following:

Team booking:

You can use Team booking if you would like to allow your customers to book a meeting say, 'Product demo'. You can add hosts and when a customer books the meeting, a host gets assigned to take that up.

1. Click **Team Booking**.



2. In the *Calendar Information* section, do the following:

- Enter the **Calendar Name**.
Example, Project Demo.
- Add a description for your calendar.
- In the **Calendar Type** choose either **Meeting** or **Call** from the drop-down list.
- Specify the **Duration** of the meeting/call from the drop-down list.
Alternately, you can enter a custom value.

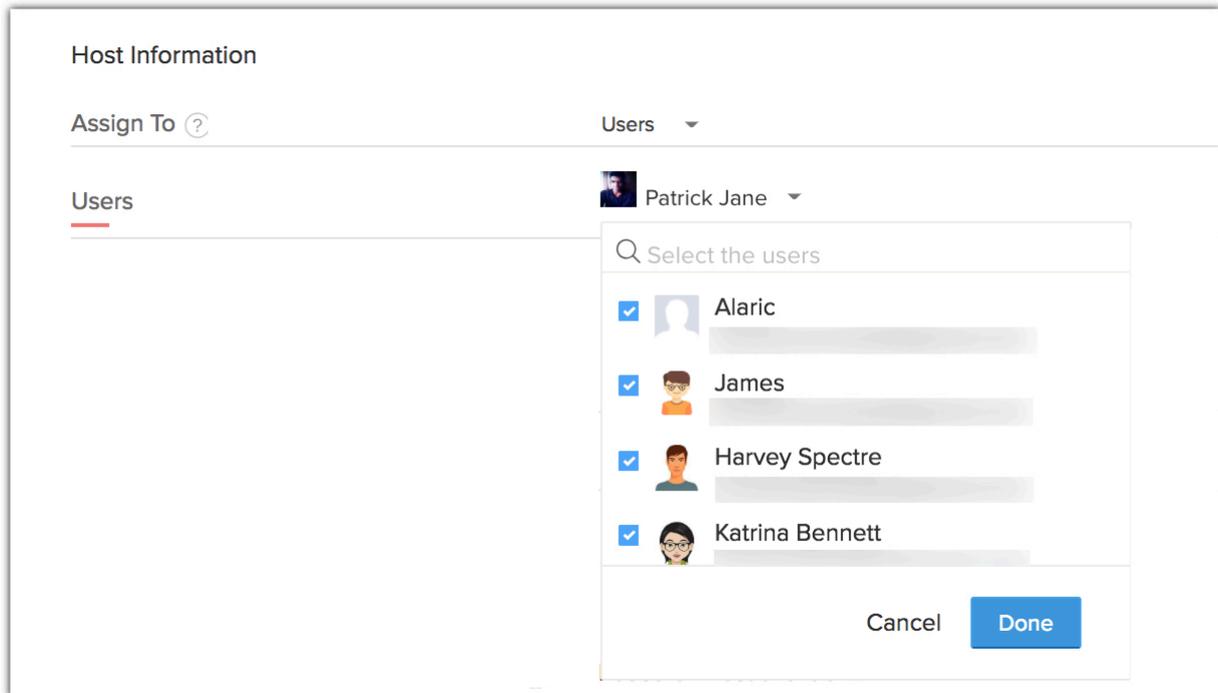
3. In the *Questions for Participants* section

- **Name** and **Email** are mandatory fields for booking an meeting which is available by default.

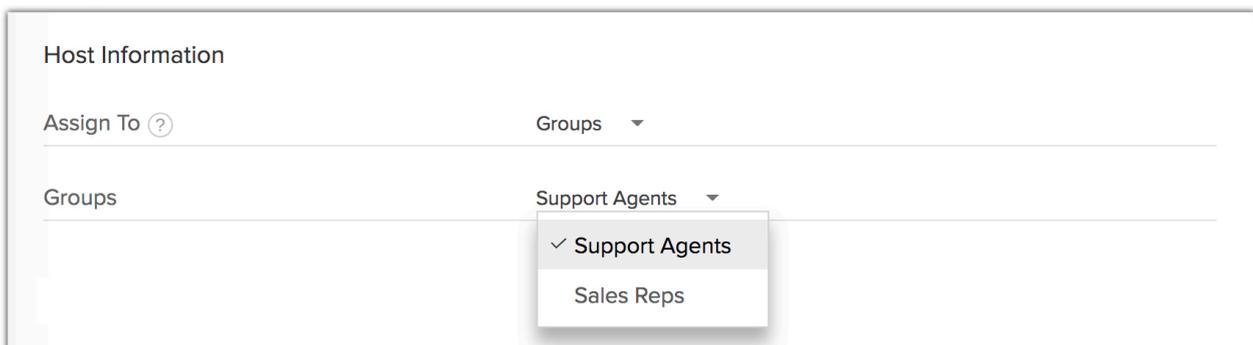
- Click **+Add questions**, if you want to add more questions.
- Add the question and choose the field where you want the response to be populated.
Add multiple questions and the response will be automatically entered on the corresponding field.

4. In the *Host Information* do the following:

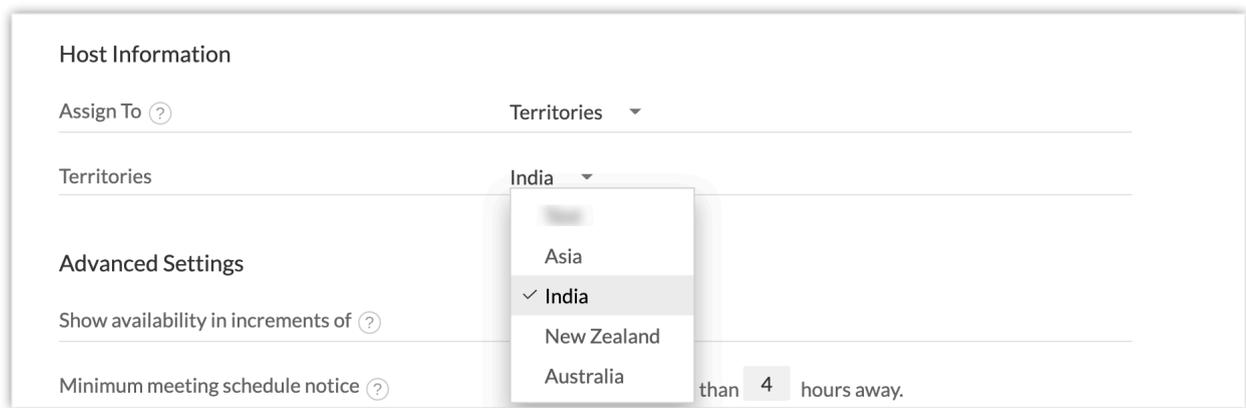
- In **Assign to** drop-down list, you can choose from **Users/Groups/Territory**. Say, you choose users, the meeting/call will be assigned to the chosen users in Round Robin pattern.
- Selecting Users from the drop-down list allows you to choose the users to whom the appointment will be assigned.



- Selecting Groups from the drop-down list allows you to choose the group to which the appointment will be assigned.



- Selecting Territories from the drop-down list allows you to choose the territory to which the appointment will be assigned.



5. In the *Advanced Settings* section, set conditions for how the booking time should be displayed based on the following criteria.

- **Show availability in increments of "x" minutes**

- Choose the time interval from the drop-down list.

- **Minimum meeting schedule notice - Prevent meetings less than 'x' hours away**

- Enter the custom value to prevent meetings within that time frame.

- **How far ahead the meetings can be scheduled**

- Enter a custom period of rolling days or a specific duration of your choice.

- **Maximum no-of meetings on same time slot**

- Click the drop-down list to choose the number of meetings that can take place at a particular time slot.

You can choose from the drop-down list or enter a custom value.

- **Maximum number of meetings accepts per day**

- Click on the drop-down list to choose the maximum number of meetings that can take place in a day.

You can choose from the drop-down list or enter a custom value.

- **Buffer for host before meetings**

- Select the buffer time from the drop-down list.

You can also enter a custom value.

- **Remind participants before the event**

- Select the time from the drop-down list to trigger a reminder before the meeting.

Advanced Settings

Show availability in increments of

Minimum meeting schedule notice

How far ahead the meeting can be scheduled 60 Rolling days
 From to

Maximum no-of meetings on same time slot

Maximum no-of meetings accepts per day

Buffer for host before Meetings

Remind participants before the event.

6. Click **Save**.

Calendar Booking is created successfully and is displayed in the Manage Calendar Booking window.

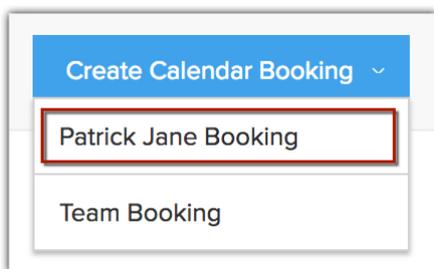
Note

- You can select the users from a particular territory, only if your organization has enabled Territory Management.

User booking:

You can use this option if you would like to allow your customers to book a meeting with you (the user).

1. Click **[User] booking**.

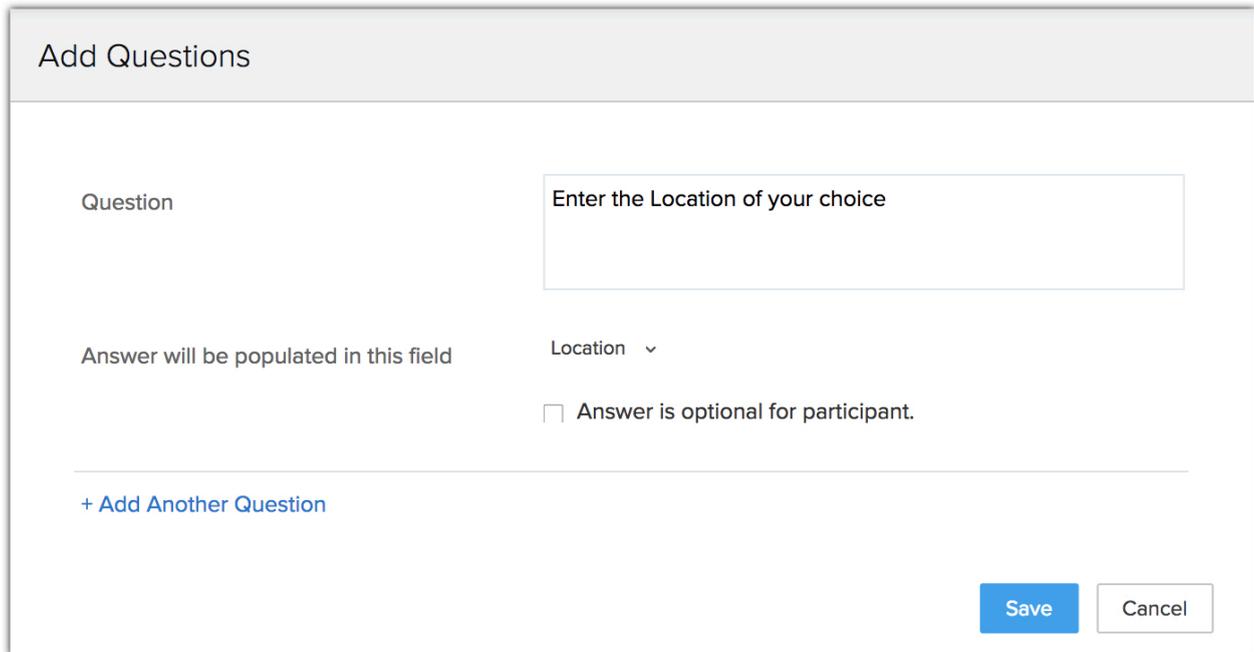


2. In the *Calendar Information* section, do the following:

- In **Calendar type** select **Meeting** or **Call** from the drop-down list.
- Specify the **Duration** of the Meeting/Call from the drop-down list. Alternately, you can enter a custom value.

3. In the *Questions for Participants* section, do the following:

- **Name** and **Email** are mandatory fields for booking a meeting whereas, **Name** and **Phone** are for **Calls**, which is available by default.
- Click **+Add questions**, if you want to add more questions.
- Add the question and choose the field where you want the response to be populated. You can add multiple questions and the response will be automatically entered in the corresponding field.
The response for the questions can be made optional for the participant.



Add Questions

Question

Answer will be populated in this field Location ▾

Answer is optional for participant.

[+ Add Another Question](#)

4. In the *Advanced Settings* section, set conditions for how the booking time should be displayed based on the following criteria.

- **Show availability in increments of "x" minutes**
 - Choose the time interval from the drop-down list.
- **Minimum meeting schedule notice - Prevent meetings less than 'x' hours away**
 - Enter the custom value to prevent meetings within that time frame.
- **How far ahead the meetings can be scheduled**
 - Enter a custom period of rolling days or a specific duration of your choice.
- **Buffer for host before meetings**
 - Select the buffer time from the drop-down list.
You can also enter a custom value.
- **Remind participants before the event**

- Select the time from the drop-down list to trigger a reminder before the meeting.

Advanced Settings

Show availability in increments of ? 30 minutes ▾

Minimum meeting schedule notice ? prevent meeting less than 4 hours away.

How far ahead the meeting can be scheduled ? 60 Rolling days
 From Jun 2, 2021 to Aug 31, 2021

Buffer for host before Meetings ? No Buffer ▾

Remind participants before the event. ? 30 minutes before ▾

5. Click **Save**.

Calendar Booking is created successfully and is displayed in the Manage Calendar Booking window.

Share Calendar Booking

There are three ways in which you can share the link with your customers.

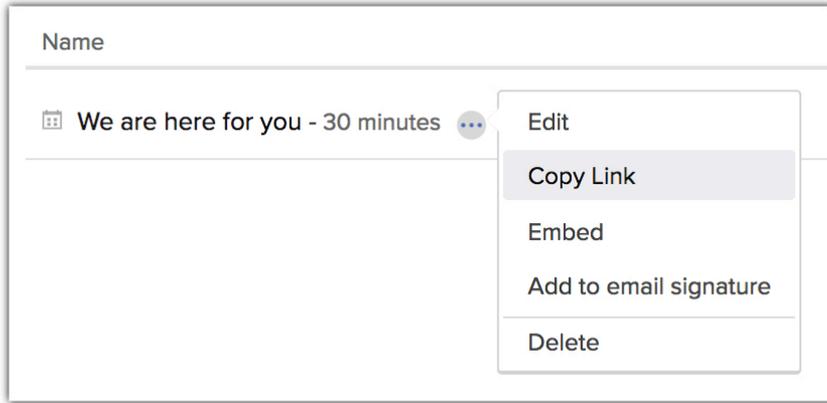
- Copy Link and share it with your customer via any medium (Social Media, SMS, Email, etc.)
- Embed the code in your website.
- Add the link as an Email Signature.

Copy Link

To copy booking link

1. Log in to Zoho CRM.
2. Go to **Calendar**.
3. Click **Options** and choose **Calendar Booking** from the drop-down list.

4. In the *Manage Calendar Booking* page, click **More** against the booking you want to share.



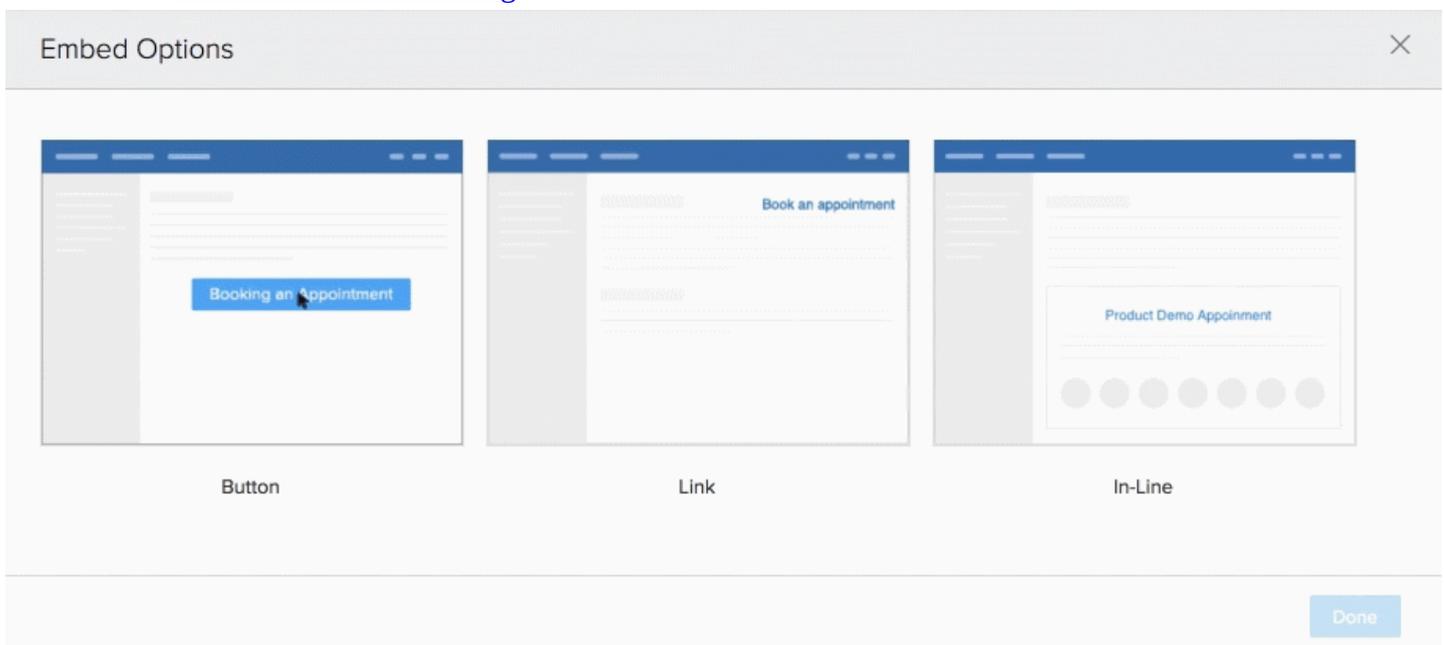
5. Click **Copy link**.

Embed Calendar Booking

Zoho CRM allows you to embed the calendar booking in your website by three ways.

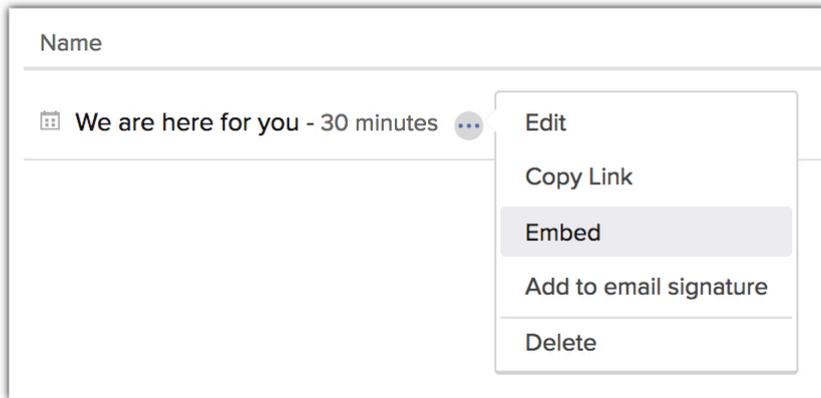
- **Button** - The calendar booking will be embedded as a button and upon clicking, the booking page will appear as a overlay.
- **Link** - The calendar booking will be embedded as a link.
- **In-line** - The calendar booking will be embedded on the web page and the customers can book a meeting or call right from there.

Read More: [Embed Calendar Booking](#)



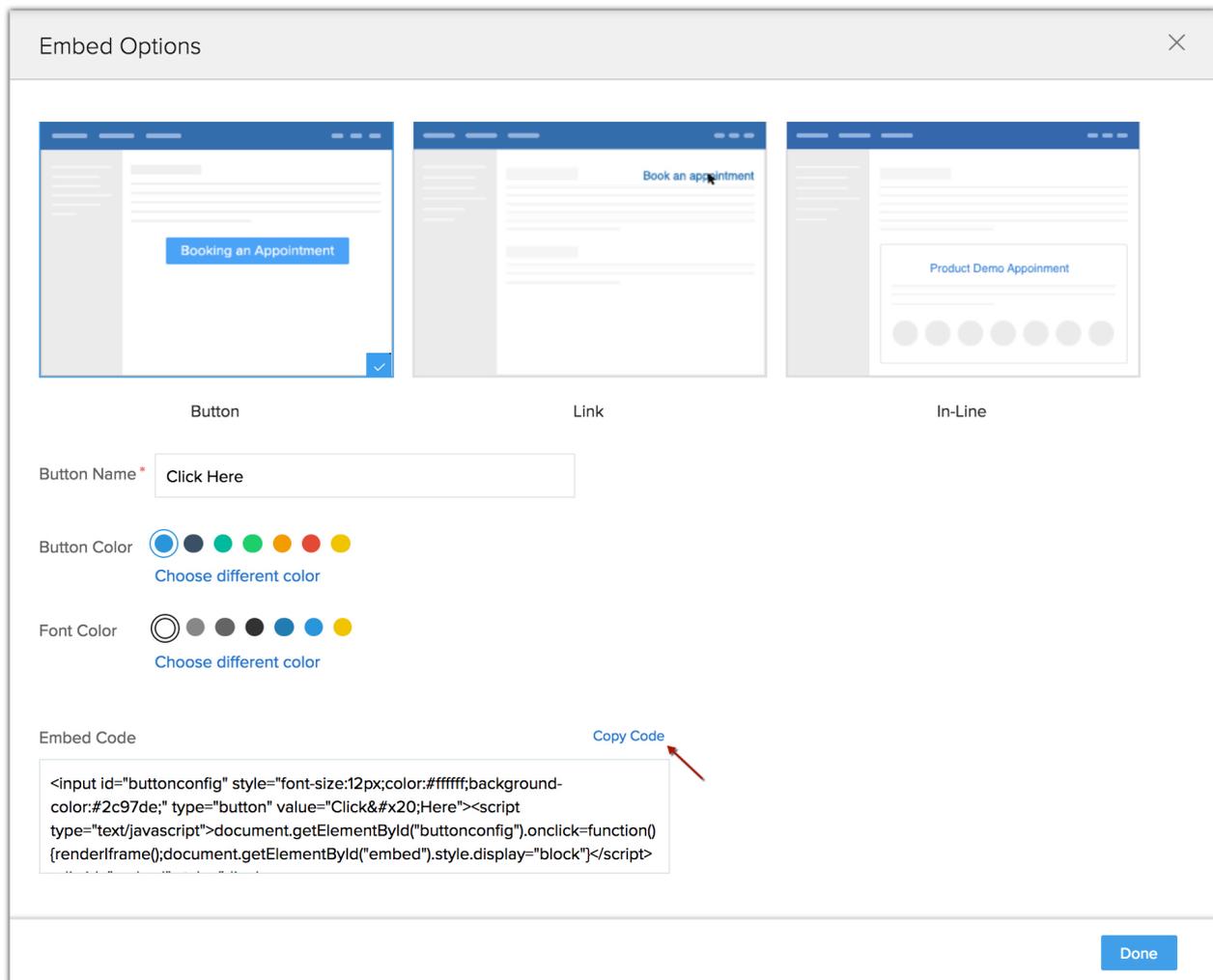
To embed calendar booking

1. In the *Manage Calendar Booking* window, click **More** > **Embed** against the booking you want to share.



2. In the *Embed Options* popup, do the following:

- Choose **Button/Link/Inline**.
Enter **Name** for button and link.
- Select the **Theme, Font color** and, **Background Color**
- In the embed code section, click **Copy Code** and the code can be pasted on your website's HTML source code.



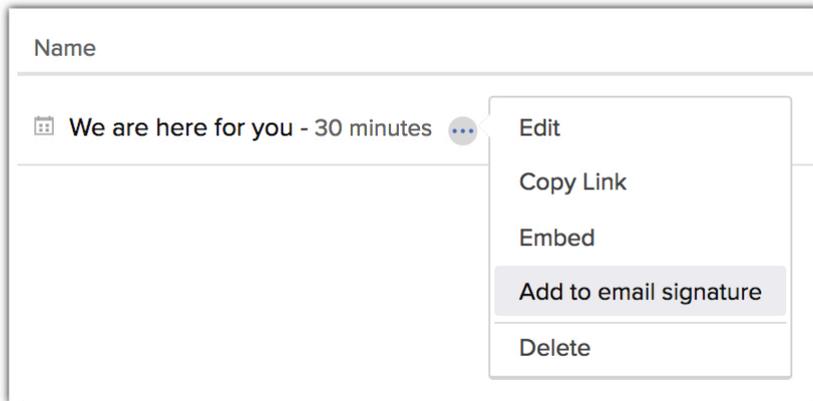
3. Click **Done**.

Add to Email Signature

You can add the link as a signature in your email and make it easier for the customer to book a meeting.

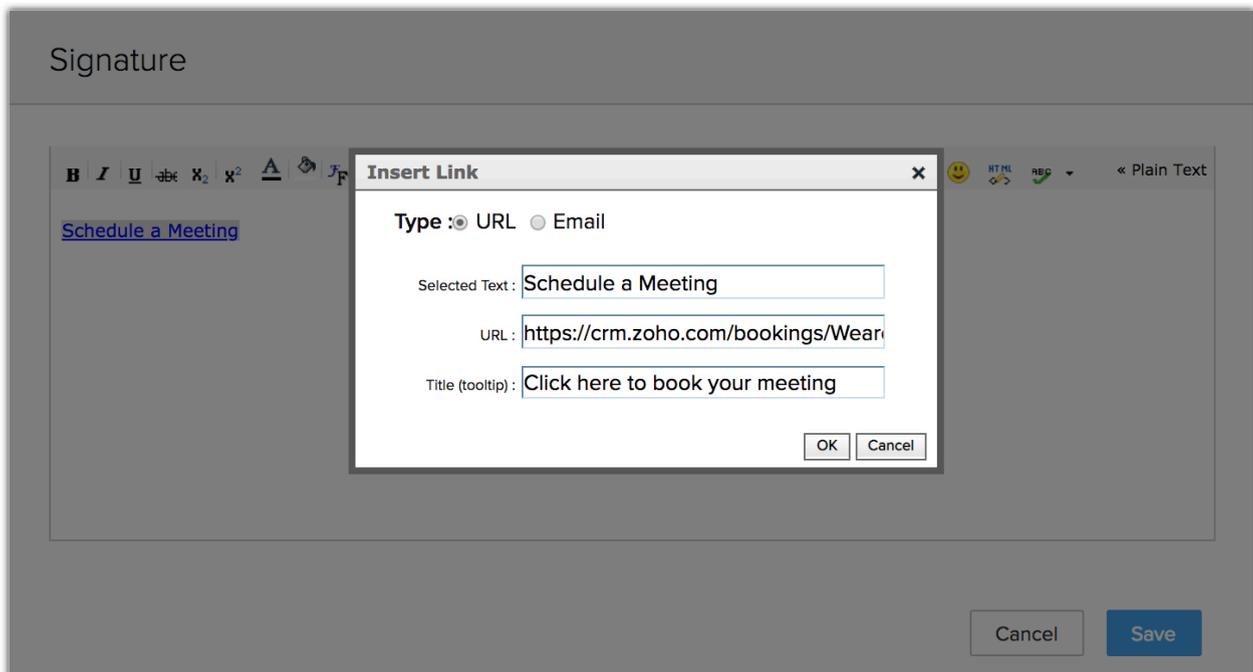
To add the booking as an email signature

1. In the *Manage Calendar Booking* window, click **More** > **Add email signature** against the booking you want to share.



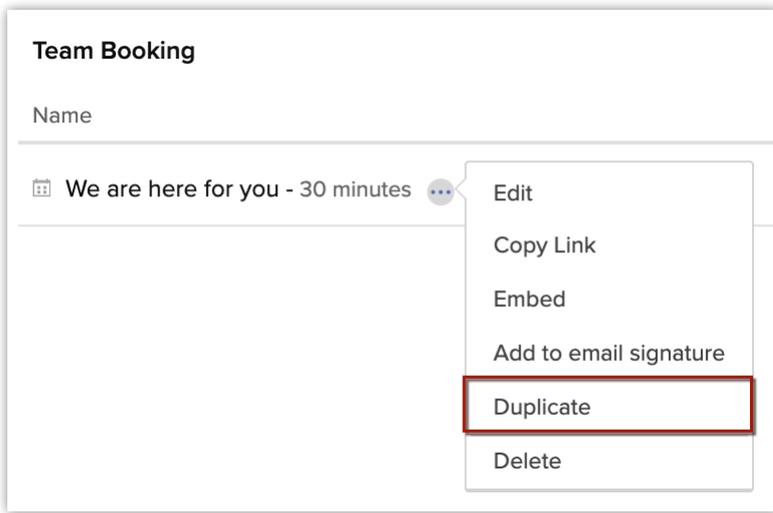
2. In the *Insert link* page, do the following:

- Enter the text in **Selected Text** box.
The URL for the booking link is displayed by default.
- Enter the Title (tooltip) and click **OK**.



Creating Duplicates

The team bookings that were configured can be duplicated and the configuration can be modified based on your requirements. You can create duplicates by clicking **More** > **Duplicate**.

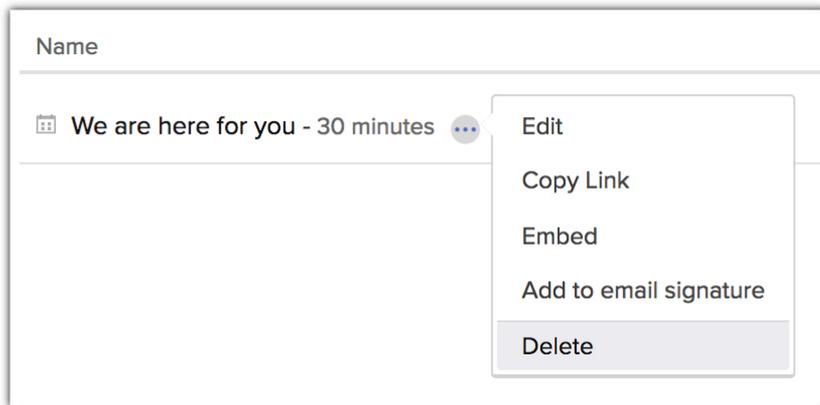


Delete Calendar Booking

User with appropriate permissions can delete the calendar booking if they are no longer necessary.

To delete a Calendar booking

1. In the *Manage Calendar Booking* window, click **Menu** > **Delete** against the booking you want to delete.



2. In the delete booking confirmation popup click **Delete** to delete the booking.

Activate and Deactivate Calendar Booking

When the booking you created is not necessary at the moment, you can always deactivate them. By deactivating the booking remains unchanged except that it will be inactive.

User with appropriate privileges can activate and deactivate a calendar booking.

To activate/deactivate a Calendar Booking

1. In the *Manage Calendar Booking* window, toggle the status button to activate/deactivate.

Team Booking		
Name	Last Modified By	Status
 We are here for you - 30 minutes	 Patrick Jane	<input checked="" type="checkbox"/>

Green indicates the calendar booking is active.

Note

- You can create 25 active Team Bookings and 3 active User Bookings.

Booking a meeting or call with an user or a team

The customer can book by choosing the appropriate date and time of his choice. Once booked, an confirmation email will be sent with the option for the user to reschedule/cancel the confirmed booking.

To schedule a meeting with an user/team

1. Select the **date** of your choice.

We are here for you

Choose the date and time of your choice to book a meeting with the Support Agent

Sep
17
Mon

Sep
18
Tue

Sep
19
Wed

Sep
20
Thu

Sep
21
Fri

Sep
22
Sat

Sep
23
Sun

>

2. Select the **time** of your choice.

You can filter between **AM/PM** and **24 Hours** format.

We are here for you

Choose a date and time of your choice to book a meeting with the Support Agent

Calendar navigation showing dates from Sep 17 (Mon) to Sep 23 (Sun). Sep 19 (Wed) is selected.

CHOOSE A TIME

AM/PM 24 HOURS

All times are in (GMT -7:0) Pacific Daylight Time (America/Vancouver)

12:00 AM

12:30 AM

1:00 AM

1:30 AM

2:00 AM

2:30 AM

3:00 AM

3. Enter your **Name** and **Email** and click **Save**.

The confirmation status will be displayed.

Confirmation summary on the left and input fields on the right.

- We are here for you
- Wednesday 19 September 2018
- 02:00 - 02:30 (GMT 5:30) India Standard Time

Name*
Isabella Mason

Email*
masonisabella.g@gmail.com

4. Upon confirmation of the appointment an email will be sent to the customer with the summary of the completed booking.

The email also allows the customer to reschedule/cancel the appointment made.

The screenshot shows an email interface with the following details:

- Subject:** Confirmed: We are here for you with Patrick Jane on 19 Sep 02:00 India Standard Time
- Sender:** AK <notifications@zohocrm.com> to me
- Time:** 4:33 AM (2 minutes ago)
- Calendar Card:** Shows a calendar for September 19, 2018 (Wednesday). The event is titled "Isabella Mason" and is scheduled for "Wed Sep 19, 2018 2am - 2:30am (IST)". The attendees are "masonisabella.g@gmail.com, Patrick Jane*". A link "Sign up for calendar" is provided.
- Agenda:** Lists the event "Isabella Mason" at "2am" on "Wed Sep 19, 2018". It also notes "No earlier events" and "No later events".
- Body Text:**

Hi Isabella Mason,

Your appointment with Patrick Jane at 02:00 India Standard Time on 19 Sep is scheduled.

If you are no longer able to attend this session, please [Reschedule](#) or [Cancel](#) your appointment.

To reschedule an appointment

1. Click **Reschedule** from the email.
You will be redirected to the bookings page.
2. Click **Reschedule Appointment** and continue from step 1.

The screenshot shows a confirmation screen with the following text:

We are here for you

Wednesday 19 Sep 2018

02:00 - 02:30 India Standard Time(GMT 5:30)

[Reschedule Appointment](#)

To cancel an appointment

1. Click **Cancel** from the email.
You will be redirected to the bookings page.

2. Click **Cancel my appointment** and your booking will be cancelled.



We are here for you
Wednesday 19 Sep 2018
02:00 - 02:30 India Standard Time(GMT 5:30)

Cancel my appointment

**Appointment
Cancelled
Successfully**

We are here for you
Wednesday 19 Sep2018
02:00 - 02:30 India Standard Time(GMT 5:30)