

## Using Calendly

### Contents

Setting up your account .....	1
Setting up your profile .....	2
Connecting your calendar .....	3
Connecting Zoom and Microsoft Teams.....	5
Create your schedule .....	6
Share your event link .....	9

## Setting up your account

### Accepting the invitation

Emma Lyons has invited you to simplify scheduling



Calendly <notifications@calendly.com>  
To ● Hazel Hegarty



23/05/2022

If there are problems with how this message is displayed, click here to view it in a web browser.



Calendly is a simple, elegant scheduling tool that lets people schedule with you in just a few clicks—no tedious back-and-forth required. Click below to accept the invitation and you'll be up and running in a matter of minutes.

[Accept Invitation](#)

Please note that your Calendly account and billing will be managed by Emma Lyons.

Sent from [Calendly](#)

You will receive an email from [notifications@calendly.com](mailto:notifications@calendly.com) saying that a team member is inviting you to use Calendly. If you cannot see this email, please check your junk folder.

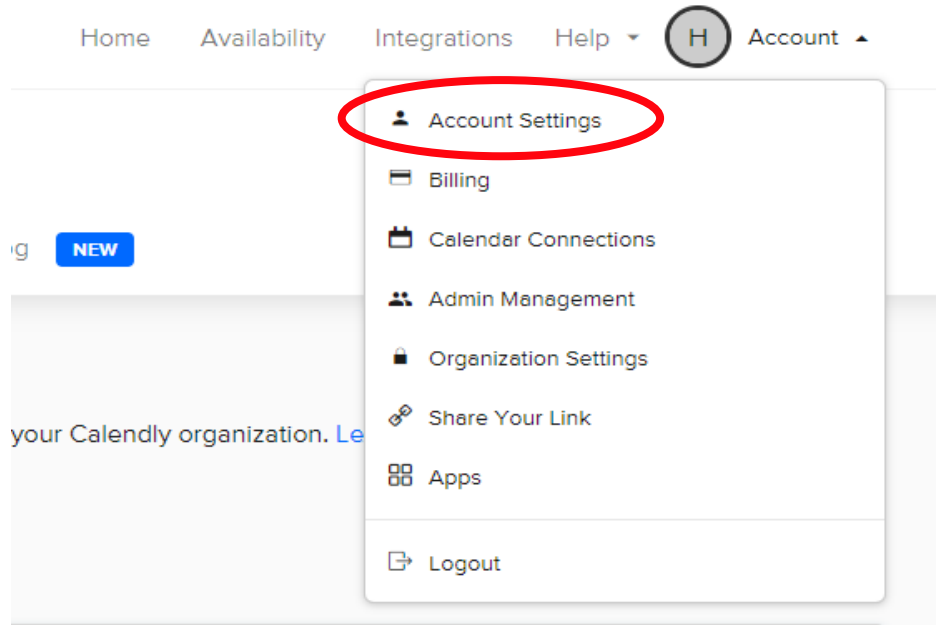
Click 'Accept Invitation'. This will take you to the Calendly website where you will follow the instructions to set up your account.



## Setting up your profile

Once you have set up your account, you can make sure everything is set up correctly.

Go to your [Account Settings page](#).



From here, you can personalize your profile, so your invitees can learn more about you. These details will show on your booking page.

Under Profile, you can adjust your name, welcome message and language. You can also upload a picture if you would like to.

### Account Settings

#### Profile

Branding

My link

Phone Number(s)

Login

Cookie settings



Upload Picture

JPG, GIF or PNG. Max size of 5MB.

Name ?

Hazel Hegarty

Welcome Message ?

Welcome to my scheduling page. Please follow the instructions to add an event to my calendar.

Language

English



Under My link, you can adjust your URL. This will be a link you can send to your coachees when they make their session bookings.

## Account Settings

Profile	Changing your Calendly URL will mean that all of your copied links will no longer work and will need to be updated.
Branding	
<b>My link</b>	
Phone Number(s)	calendly.com/ <input type="text" value="hazelhegarty"/>
Login	
Cookie settings	<a href="#">Save Changes</a>

## Connecting your calendar

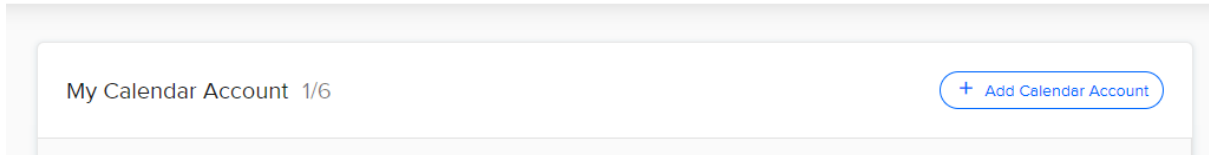
To connect your calendar, navigate to your [Calendar Connections page](#).

The screenshot shows the top navigation bar of the Calendly interface. The menu items are: Home, Availability, Integrations, Help, and Account. The Account menu is open, showing a list of options: Account Settings, Billing, Calendar Connections (circled in red), Admin Management, Organization Settings, Share Your Link, Apps, and Logout. A 'NEW' badge is visible next to the 'Integrations' link.



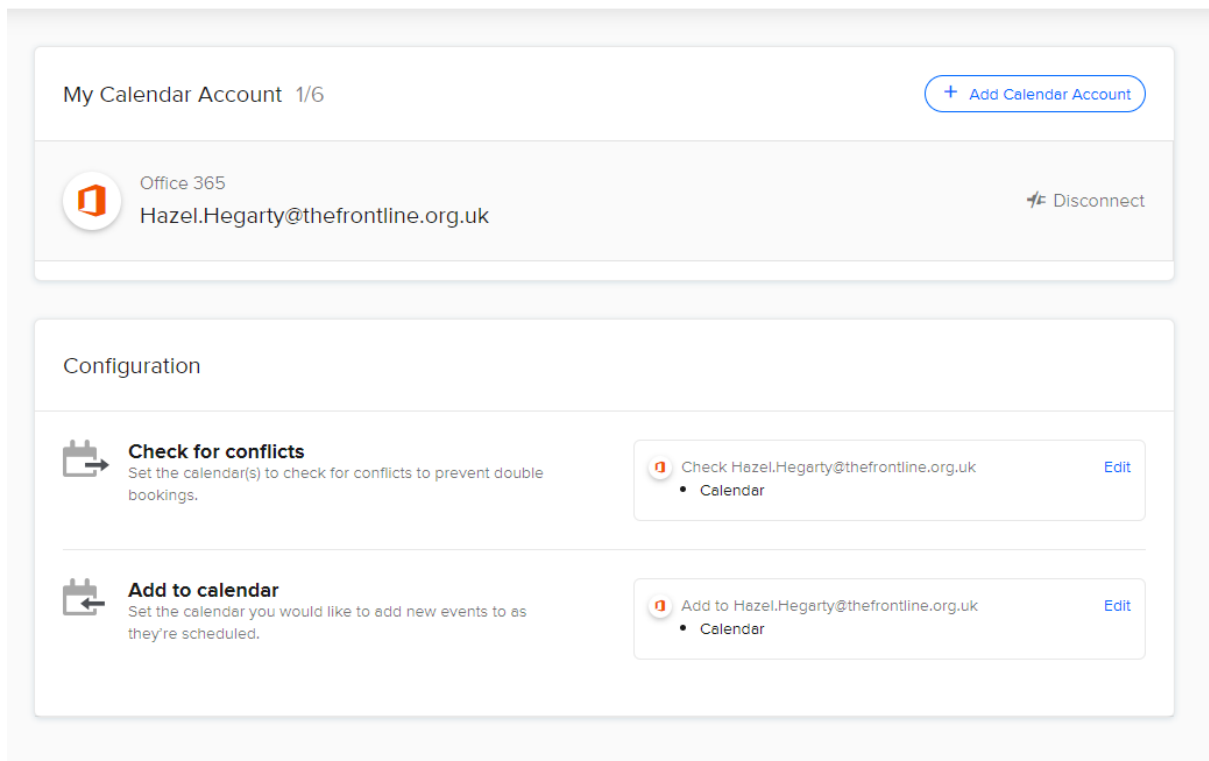
Here, you'll connect your main calendar. If you already see a calendar connected, you may have already connected a calendar during your sign-up process.

### Calendar Connections



While you can connect multiple calendars, Calendly can only add events to one calendar. You can choose which calendar that is under **Add to Calendar**, then select **Edit**.

### Calendar Connections



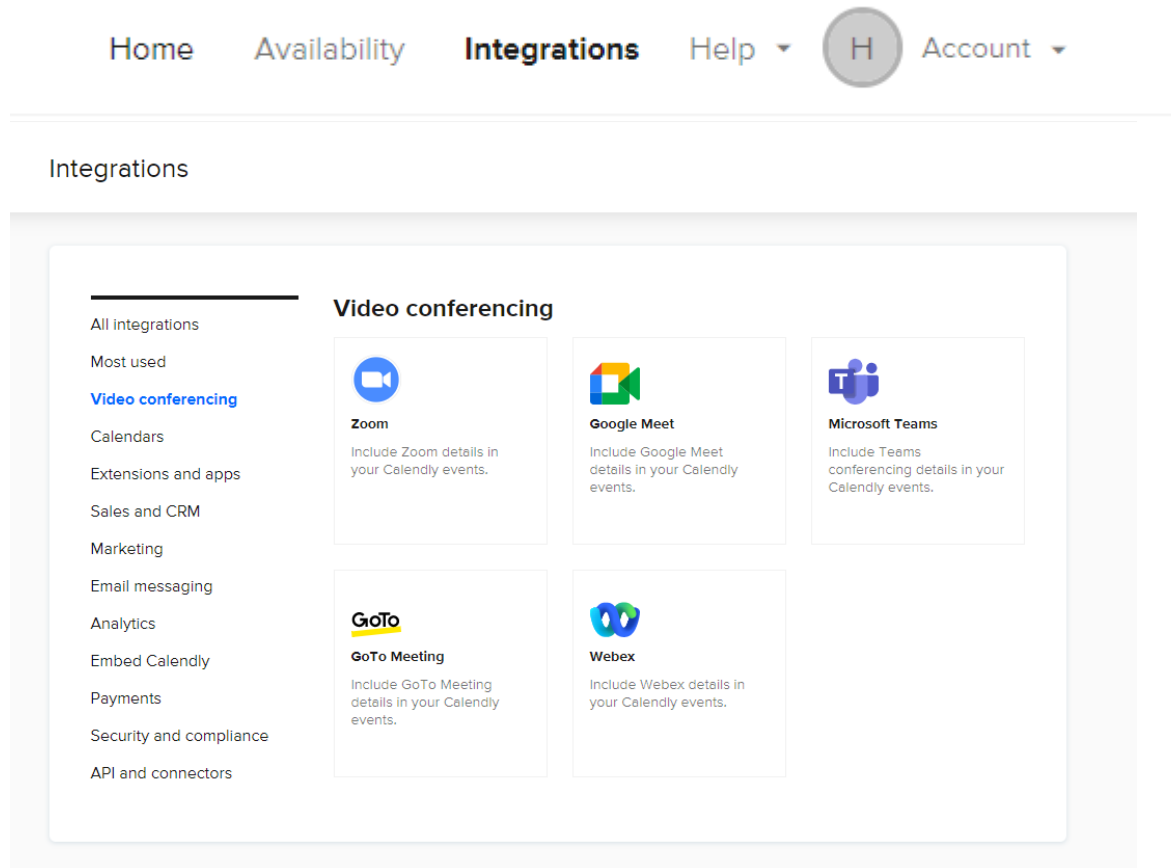
For further guidance on specific calendars please see the following:

- [Google Calendar](#)
- [Office 365 Calendar](#)
- [Exchange Calendar](#)
- [Outlook Desktop Plug-in](#)
- [iCloud Calendar](#)



# Connecting Zoom and Microsoft Teams

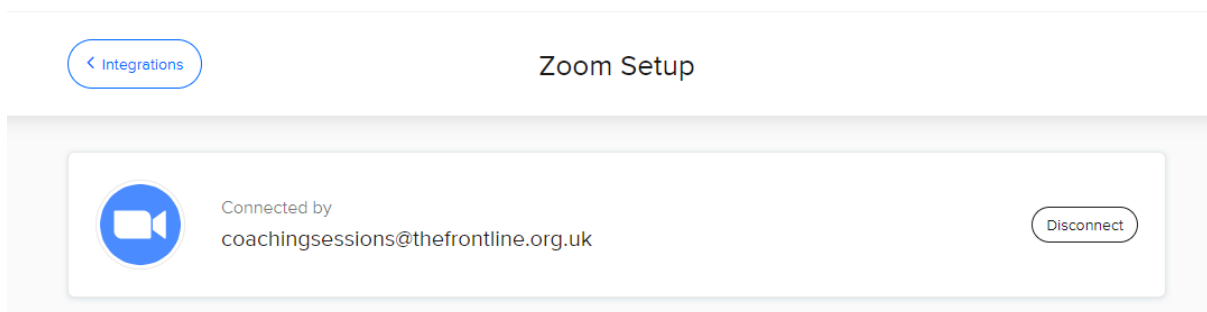
To connect video conferencing, go to the [Integrations page](#), select your video conferencing platform, and log in. Go to Integrations > Video conferencing.



Click on Zoom:

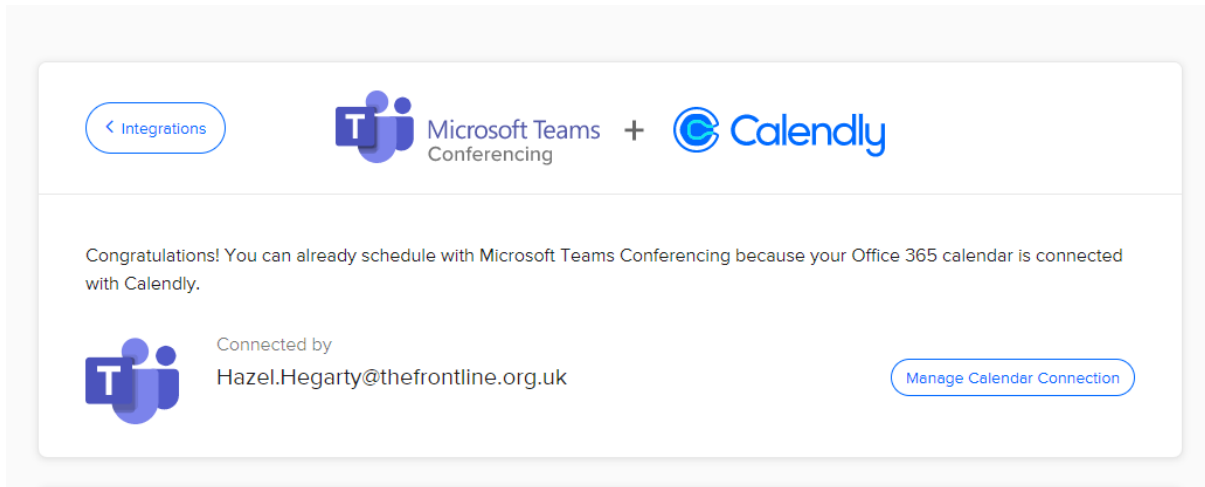
1. Select **Connect Zoom**.
2. Sign in to your Zoom account.
3. Select **Authorize** to let Calendly access your Zoom account.

You should see this page when you have connected:





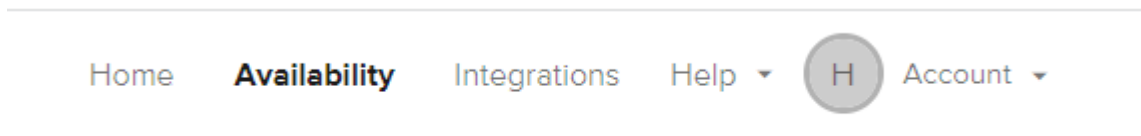
For Microsoft Teams, follow the same steps above but after clicking on Microsoft Teams. Your page will look like the below image when you have connected:



## Create your schedule

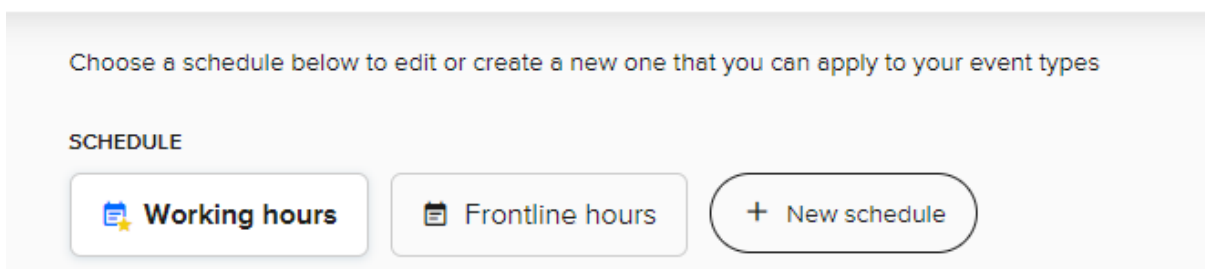
To understand when you can accept new meetings, Calendly looks at your availability from two main places:

1. Your connected calendar, like Google, Outlook, etc.
2. Your Calendly schedule, which you'll set up next
3. Go to the [Availability page](#).



4. In this section, you can build out **schedules** to tailor your available hours. For example, having different schedules for the different areas work you do.

## Set your availability





5. You can remove hours from some days or block entire days altogether. If you want to remove a day, you can deselect it, or use the trash icon.

### Set your weekly hours

<input type="checkbox"/>	SUN	Unavailable		+	📄
<input checked="" type="checkbox"/>	MON	10:00am - 3:00pm	🗑️	+	📄
		4:00pm - 5:00pm	🗑️		
<input checked="" type="checkbox"/>	TUE	10:00am - 5:00pm	🗑️	+	📄
<input checked="" type="checkbox"/>	WED	10:00am - 5:00pm	🗑️	+	📄
<input checked="" type="checkbox"/>	THU	10:00am - 5:00pm	🗑️	+	📄
<input type="checkbox"/>	FRI	Unavailable		+	📄
<input type="checkbox"/>	SAT	Unavailable		+	📄

### Add date overrides

Add dates when your availability changes from your weekly hours

[Add a date override](#)

If there are hours that fall outside of the availability in your schedule, you can also set a **date override**. Date overrides are for times that don't follow a pattern, like holidays or days you know you won't be in office.

Click on **Add a date override**.

Here you can select the specific dates you want available and the times for them.

Then click **Apply**.

### Select the date(s) you want to assign specific hours

September 2022

SUN	MON	TUE	WED	THU	FRI	SAT
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

What hours are you available?

9:00am - 5:00pm 🗑️ +

[Cancel](#) [Apply](#)



You can see in the below example, this schedule is set to only offer times on specific dates after following the above steps.

**Frontline hours** ⚙️

ACTIVE ON: 0 Event Types ▼ TIME ZONE: UK, Ireland, Lisbon Time ▼

List view 📅 Calendar view

**Set your weekly hours**

- SUN Unavailable + 📅
- MON Unavailable + 📅
- TUE Unavailable + 📅
- WED Unavailable + 📅
- THU Unavailable + 📅
- FRI Unavailable + 📅
- SAT Unavailable + 📅

**Add date overrides**

[Add a date override](#)

- 21 Sep - 22 Sep 2022 9:00am - 5:00pm 🗑️
- 26 Sep - 28 Sep 2022 9:00am - 5:00pm 🗑️

Once you're happy with your schedule, you can apply it to any event types that need these times.

Choose a schedule below to edit or create a new one that you can apply to your event types

**SCHEDULE**

📅 Working hours 📅 Frontline hours + New schedule

**Working hours**  
★ default schedule

ACTIVE ON: 1 Event Type ^ TIME ZONE: UK, Ireland, Lisbon Time ▼

Search...

Select all Deselect all

- Frontline Y2 coaching - session 1 + 📅





You can create as many schedules as you like and apply them to different event types.

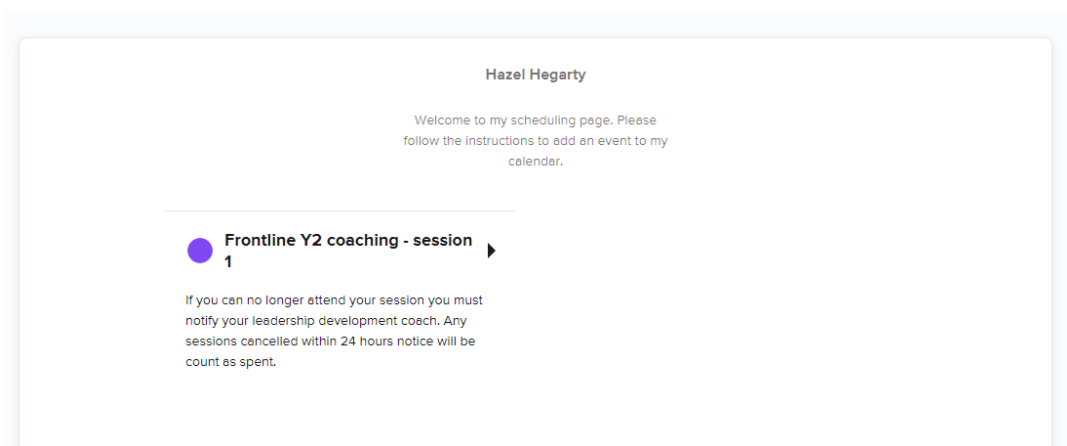
For further guidance see:

- [Define your available hours using schedules](#)
- [How to set up and edit your available hours](#)

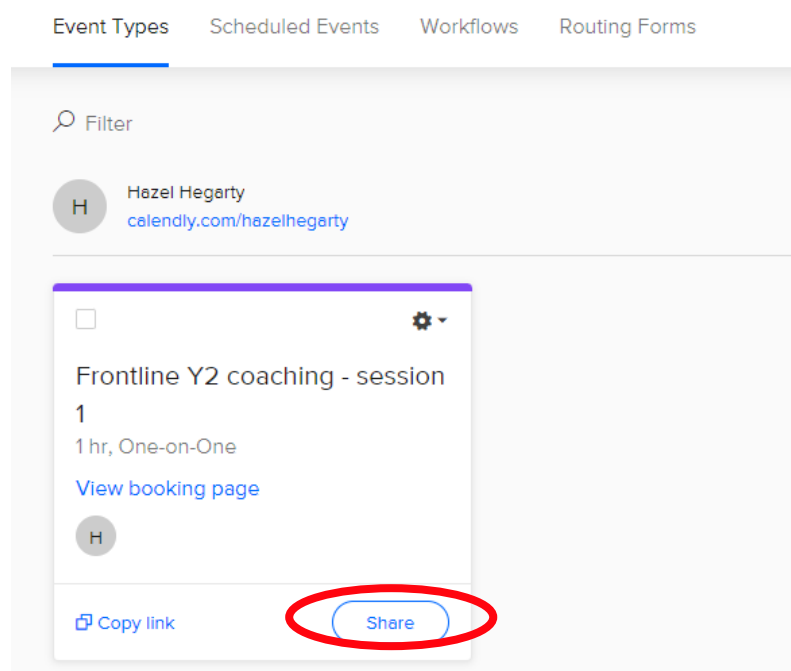
## Share your event link

The first option is to share your **landing page link**, which includes all active event types for your invitee to choose from. This is the link we looked at when editing your profile.

You can copy it from your [Home page](#), under your name. This link will take coachees to a page which shows all your session types, where they can choose which type of session to book with you:

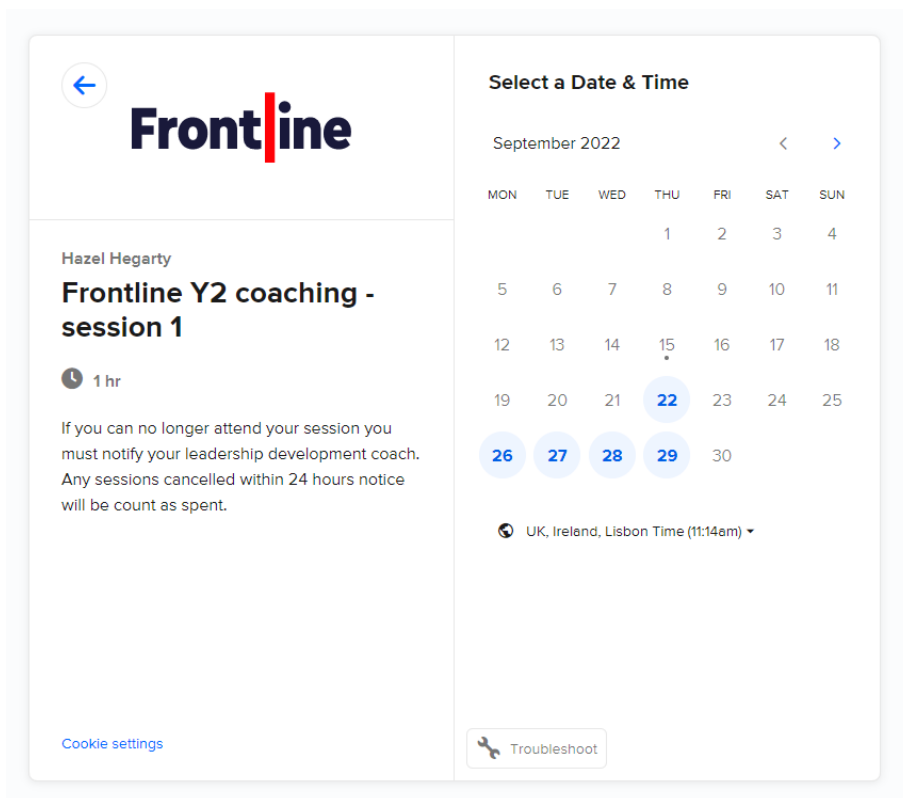


The second option is to share your **event link**. If you want your invitee to book a specific event type. You can access it from the **Share** button on your event types.





This will take coachees directly to book for the specific session type:



When you select **Share**, you also have the option to:

- [Share a link](#): This creates a link for your event, for you to share with your invitee.
- [Add times to email](#): This lets you select a handful of times to add to an email.
- [Add to your website](#): This creates code for you to add Calendly to your website. To view examples of what this looks like, check out [these embedded Calendly booking pages](#).

For further guidance see:

- [Sharing your scheduling link](#)