Appointments - Set up your booking page⸕

This article applies to:

Once your Google calendar or Outlook calendar has been connected to Keap, you will set up your booking page. In this article you will personalize the attributes of the appointment day and time they can book.
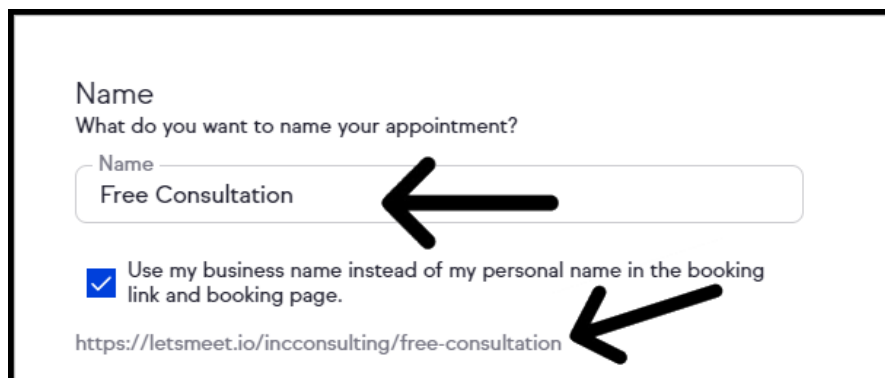
- Set your appointment location, the days and times of the week that clients can schedule with you

- Preview your booking page, then share it with a client or prospects

Important Note! To avoid double booking, make sure all of your calendar appointments are marked as "Busy". Otherwise, your customers can still schedule during that time frame. This is located in the Google calendar appointment record in the notification area.
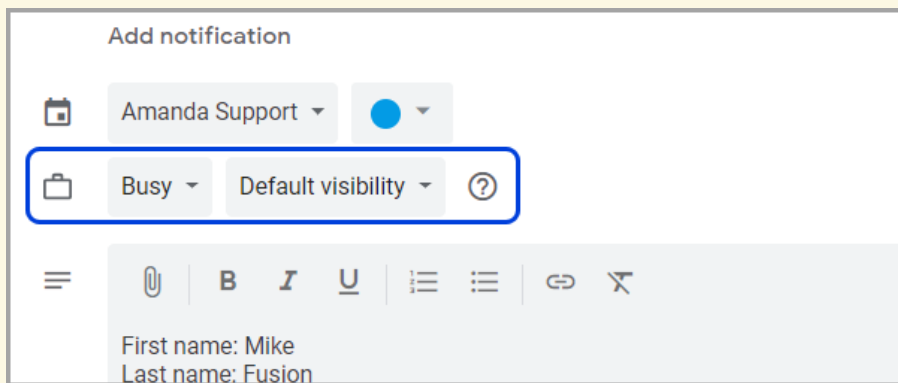
Setting appointment preferences

1. Enter a name to associate with your appointment link i.e. "Consultation". Note that the name will become the end of the booking URL

2. Click the box to use your business name instead of your personal name in the booking link. Note the business name in the booking link URL.

3. Location: **Online** - You can choose to provide an online meeting link or let the invitee provide a meeting link.

4. If **Let the invitee choose a meeting link** is selected, the invitee will be required to fill the **Your online meeting link** field on the appointment invitation they receive by email.

5. Location: **Phone** - You can elect to call the customer (ask the invitee for their phone number) or request the invitee call the user (by providing a phone number to for the invitee to call).

6. If **I will call the customer** is selected, the invitee will be required to fill the **phone** field on the appointment invitation they receive by email.

7. Location: **In Person** - The user can elect to choose the meeting location and provide an address, or let the invitee choose the location (request an address from the invitee).

8. If **Let the invitee choose the location** is selected, the invitee will be required to fill the **Where will we meet** field on the appointment invitation they receive by email.

9. Click **Next**

10. You can select from the available standard durations (15, 30, 45, 90 minutes, 1 hour, or 2 hours increments)

11. Scroll to the bottom of the appointment duration drop-down to select a **custom** duration.

12. If **Custom** duration was selected, select the duration using the **Hour** and **Minute** selection boxes

13. You have the option of putting a buffer time of 15, 30, or 45 minutes between appointments

14. Specify the amount of time that you will need before an appointment can be booked on your calendar.

15. Choose time frames across any day of the week that you want to be available

16. Click **+ Add timeframe** to add additional timeframes to that day

17. Click the trash bin button to remove a timeframe

18. Once you set the desired days and times click **Next**

19. Activate the toggle to add **Pre-appointment instructions**

20. Your client will see the pre-appointment instructions at the top of the booking confirmation page.

21. Select which calendars Keap should use to determine your availability. If you select multiple calendars, you will be prompted to select a calendar for new appointments to be added to by Keap.

Your calendars
Which calendars should we use to determine your availability?

☑ bricktopmarketing@keap.com

☑ Personal calendar

Add new appointments to ⌄

22. Click Next at the top of the page

23. (optional) Add automation. Click the **+Create Automation** button.

Automate follow-ups for appointments
Trigger a follow-up when a contact books or cancels an appoint

+ Create automation

24. Click the **Then** card. and select what action you would like to take place once a consultation is scheduled.

⚡ **Then**
...this will be automated.

⊕

25. Now, select what action you would like to take place once a consultation is scheduled. The most common options are at the top, but you can scroll down the panel to see all available options. To learn more about creating Easy Automations, click here
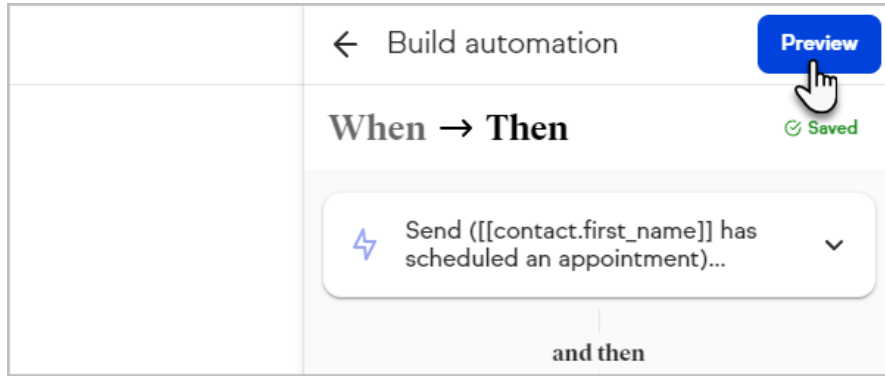

Suggested options
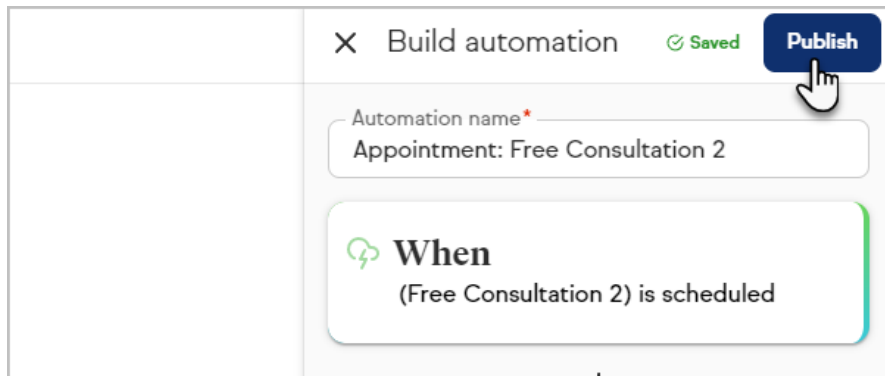
Send an email

Send notification

Send a text

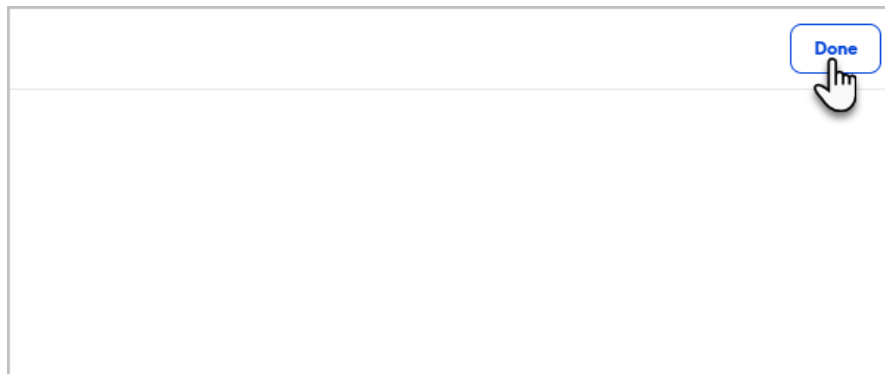Create a deal

26. Click **Preview** when you are finished.

27. When are happy with everything, click the **Publish** button at the top right of the page.
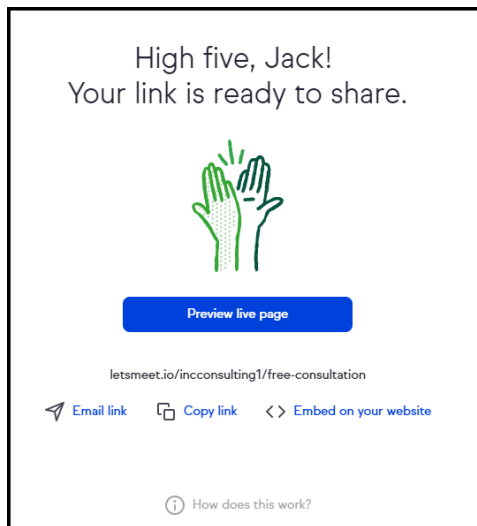

28. Click the **Close** button to close the panel, and then click **Finish** in the upper right hand corner.

29. Click **Done** to close the Appointment Booking setup page.

30. You can preview the live booking page, Email the booking link, copy the booking link, or access the booking page code snippet to embed on your website.

High five, Jack!
Your link is ready to share.

Preview live page

letsmeet.io/incconsulting1/free-consultation

✈ Email link   ⧉ Copy link   <> Embed on your website

ⓘ How does this work?

31. Click **Done** in the upper right hand corner

> **Pro tip!** Your booking page is super smart and knows when it is Daylight Savings, so you will see different times if the dates viewed are after a time change.
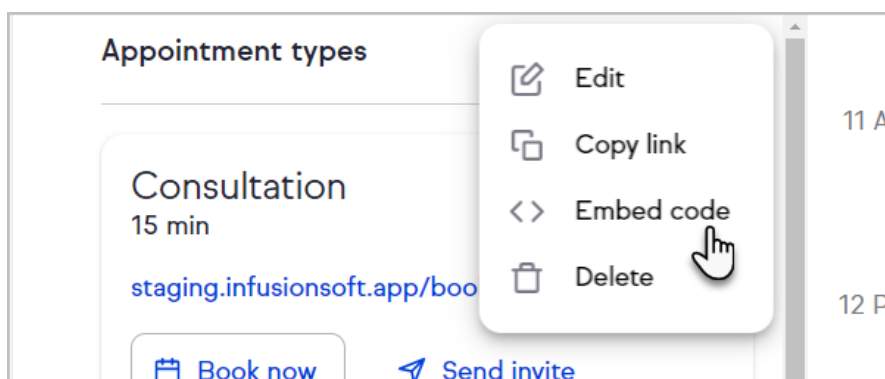>
> CLICK HERE to learn how to embed code on the 3 most popular website platforms (WordPress, Wix, and Squarespace)

Access embed code from individual booking link

1. Open the more options menu for the desired booking link from the Appointments page.
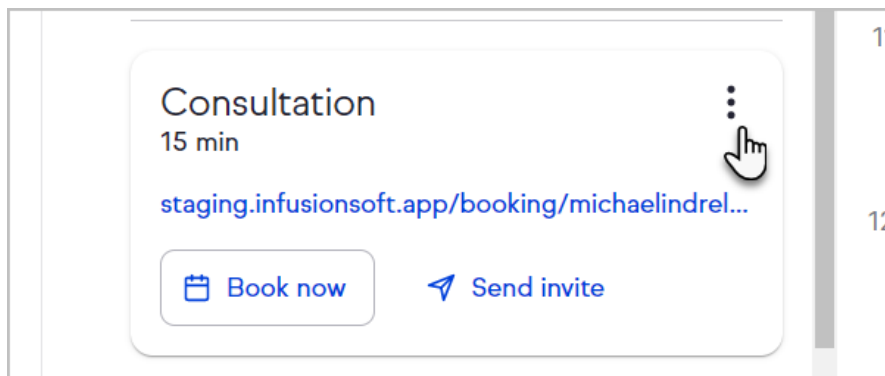
2. Click **Embed code**

3. Click the **Copy code** button

```
<iframe
src="https://staging.infusionsoft.app/booking/michaeli
consultation" style="border:none; min-height: 700px; w
min-width: 100%; *width: 100%;" name="booking" scrolli
frameborder="0" marginheight="0px" marginwidth="0px"
width="100%" height="100%" referrerpolicy="unsafe url"
```

Copy code   How to use this code

CLICK HERE to learn how to embed code on the 3 most popular website platforms (WordPress, Wix, and Squarespace)