

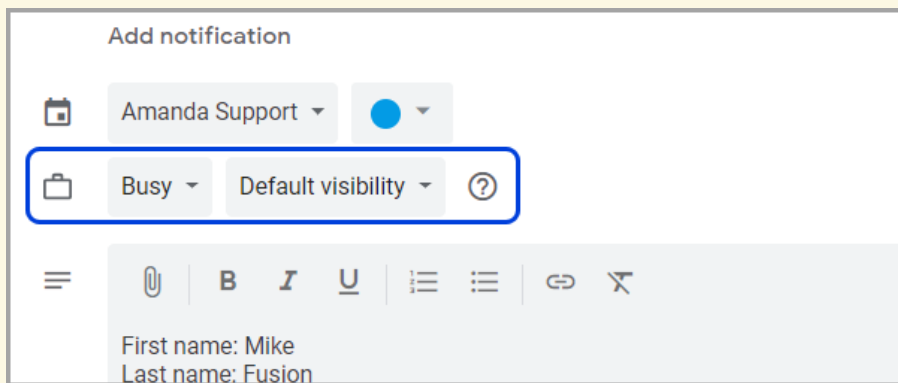
Appointments - Set up your booking page

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.

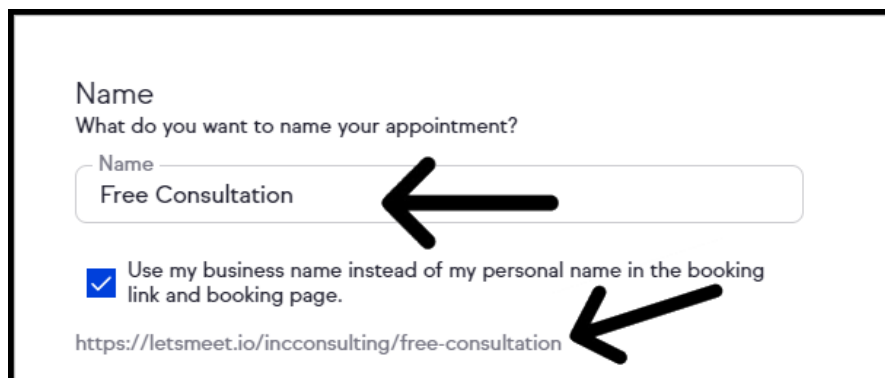
- Set your appointment location, the days and times of the week that clients can schedule with you
- Preview your booking page, then share it with a client or prospects

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.

Info Availability Options Automate

Appointment info

Name
What do you want to name your appointment?

Name*
My Free Consultation

Use my business name instead of my personal name in the booking link and booking page.

Location
Where will these appointments take place?

Online Phone In-person

[How does this work?](#)

Next

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

Online Phone In-person

I will choose an online meeting link

Zoom, Webex, Skype, etc...
https://keep.webex.com/

Let the invitee choose 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.

← 30 min chat online with jack smithson
Review and confirm your appointment

Selected date and time
Tue, Jul 2nd, 2019
09:00 AM - 09:30 AM MST (30 min)

First name*

Last name*

Email*

Phone

Your online meeting link*
Link to your Zoom, Webex, Skype, etc...

I'd like to receive important emails from Jack Smithson

Confirm Cancel

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).

Location
Where will these appointments take place?

Online Phone In-person

I will call the customer (ask the invitee for their phone number)

Ask the invitee to call me

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.

← 30 minute chat by phone with jack smithson
Review and confirm your appointment

Selected date and time
Tue, Jul 2nd, 2019
09:00 AM - 09:30 AM MST (30 min)

First name*

Last name*

Email*

Phone*

I'd like to receive important emails from Jack Smithson

Confirm Cancel

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).

I will choose the location

Select an address or location

1260 S Spectrum Blvd, Chan

📍 1260 S Spectrum Blvd, Chandler, AZ, USA

powered by Google

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.

30 minute chat in person with Jack Smithson
Review and confirm your appointment

Selected date and time
Tue, Jul 2nd, 2019
09:00 AM - 09:30 AM MST (30 min)

First name*

Last name*

Email*

Phone

Where will we meet?*

I'd like to receive important emails from Jack Smithson

Confirm Cancel

9. Click Next

Use my business name instead of my personal name in the booking link and booking page.

Location
Where will these appointments take place?

Online Phone In-person

[How does this work?](#)

Next

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

Duration
How long is this type of appointment?

Duration

15 minutes

30 minutes

45 minutes

1 hour

90 minutes

2 hours

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

Duration
Appointment duration

30 minutes

45 minutes

1 hour

90 minutes

2 hours

Custom

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

Duration

Appointment duration: Custom

Hours: 1

Minutes: 0, 15, 30, 45

Buffer time

How much time is needed before and after these types of appointment

Before: No buffer

After: No buffer

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

Buffer time

How much time is needed before and after these types of appointments?

Before: 15 minutes

After: 15 minutes

Availability

When can people schedule with you?

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

Advance notice

Specify the amount of notice that is required before an appointment can be booked.

30 Duration: Minutes before the appointment start time

Sun Mon Tue Wed Thu Fri Sat

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

Availability

When can people schedule with you?

Sun Mon Tue Wed Thu Fri Sat

Start time* - End time*

09:00 AM - 05:00 PM

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 appointment

[+ 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

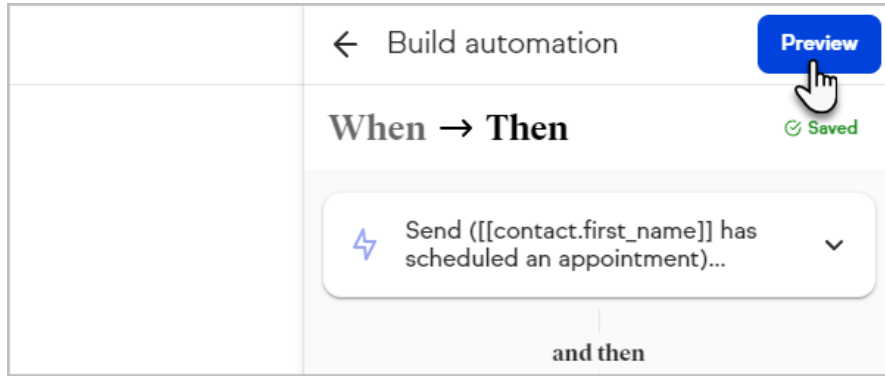
Send an email 

Send notification 

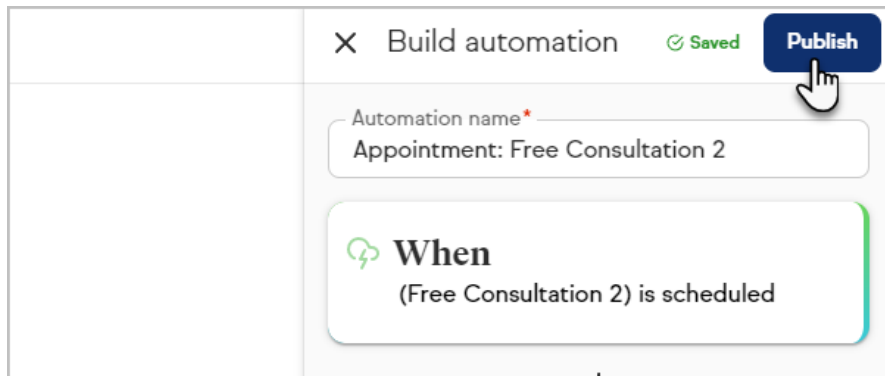
Send a text 

Create a deal 

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



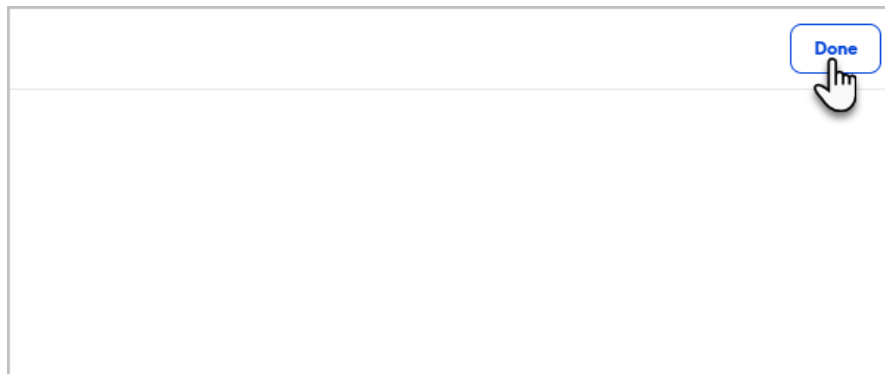
27. When are happy with everything, click the **Publish** button at the top right of the page.



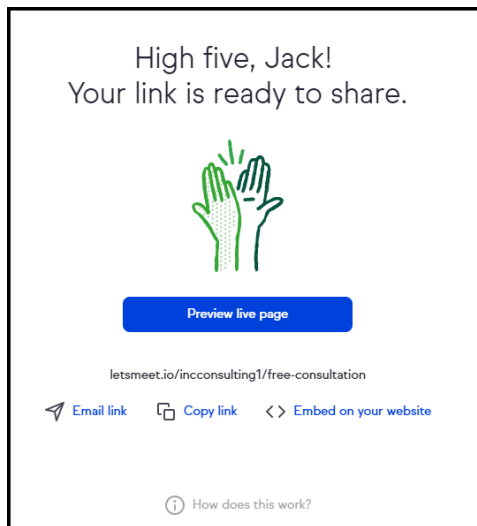
28. Click the **Close** button to close the panel, and then click **Finish** in the upper right hand corner.



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.



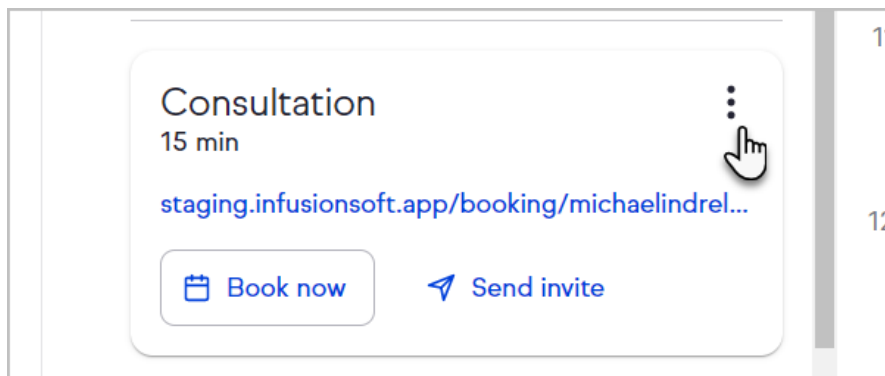
31. Click **Done** in the upper right hand corner

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.

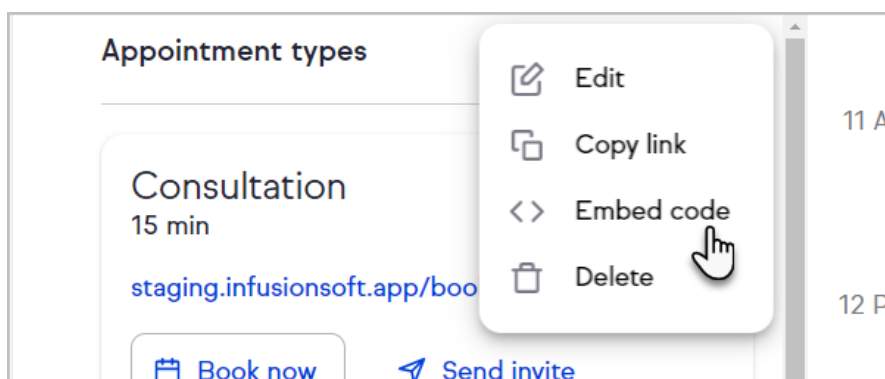
[CLICK HERE](#) to learn how to embed code on the 3 most popular website platforms (WordPress, Wix, and Squarespace)

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 ur1"
```

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)
