Appointments

Last Modified on 09/24/2024 5:21 pm MST

This article applies to:

Pro

Max

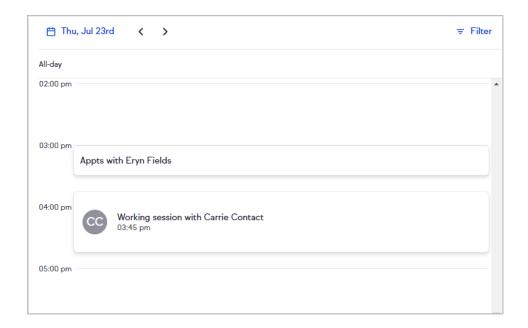
With Keap Appointments, you can manage your schedule by viewing, rescheduling, or canceling appointments with ease. Quickly send your booking link to contacts via email or text, or use share the link online or in an automation.

Note: To setup your Google Calendarclick here and to setup your Outlook Calendar click here.

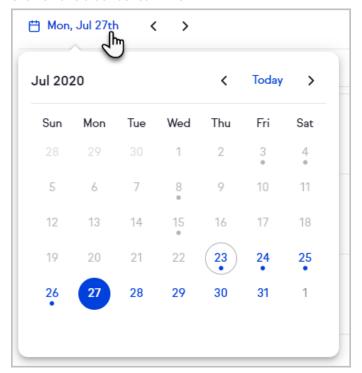
- 1. Appointments overview
- 2. Appointment details
- 3. Appointment filtering
- 4. Default appointment types
- 5. Add an appointment type
- 6. Edit appointments
- 7. Sending appointment links
- 8. Book an appointment on your calendar
- 9. Appointment reminders

Appointments overview

On the right side of the Appointments page is your daily schedule



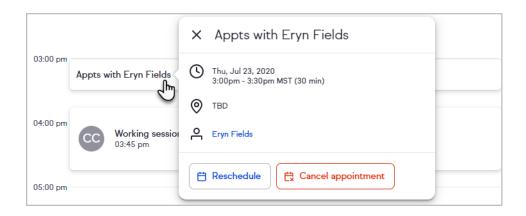
Click the date above your daily schedule to select and view another date. Today's date is circled, the date you are viewing is a solid circle, and days with calendar events have a dot beneath them.



Appointment details

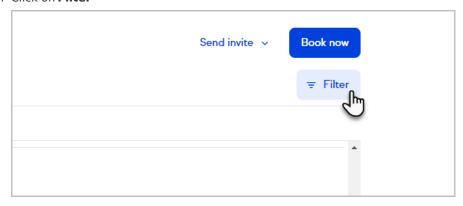
Click an appointment to view details of the appointment. There are options to **Reschedule** or **Cancel** the appointment. For more information regarding rescheduling and/or canceling an appointment, **click here**.

Events created on your Google or Microsoft calendar will be displayed on your Keap calendar, but cannot be edited in Keap. These events can be edited from your external calendar account.

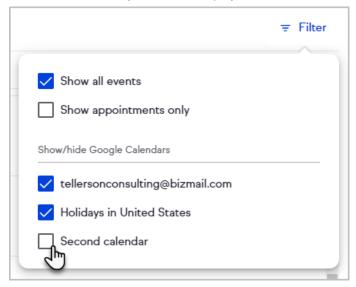


Appointment filtering

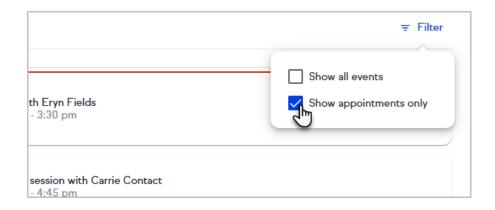
1. Click on Filter



2. Select the calendars you want to display events from

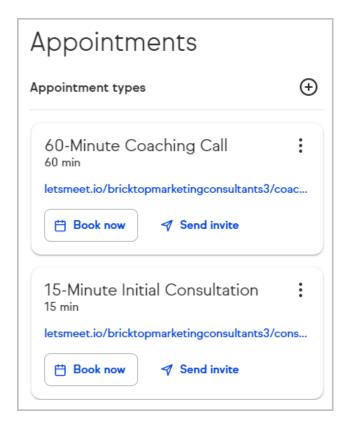


3. Or select if your calendar should **Show all events**, including ones not made by Keap, or **Show appointments only**, to only see Keap events



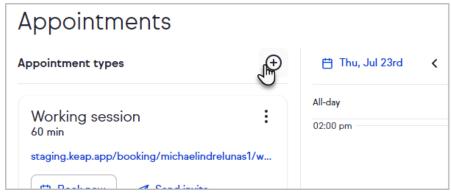
Default appointment types

After connecting your calendar, Keap will automatically create two appointment types for you: a 15 minute "Initial Consultation" and 60 minute "Coaching Call". You can use, edit, or delete these appointment types as desired.



Add an appointment type

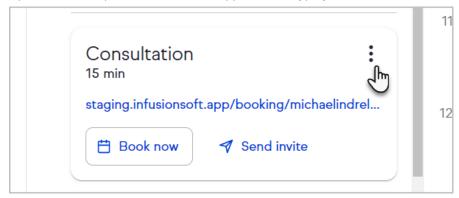
1. Click the "+" button



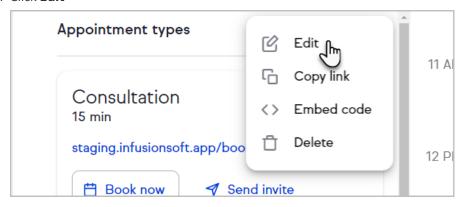
Continue setup process as previously documented here

Edit appointments

- 1. Navigate to the Appointments page
- 2. Open the more options menu for the appointment type you want edit



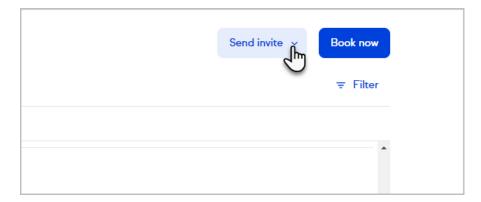
3. Click **Edit**



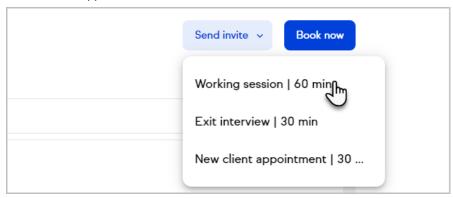
Sending appointment links

You can send an email or SMS message (Keap Business Line required) with your booking link from the Appointments page.

1. Click the **Send invite** button



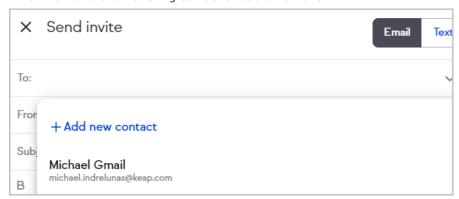
2. Select which appointment link to send



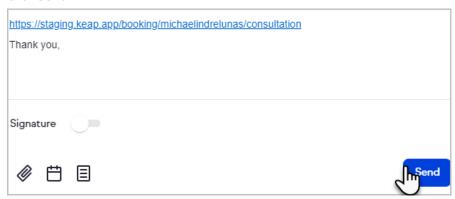
3. Select **Email** or **Text**

Note: Sending a link via text requires Keap Business Line

4. Enter the name of an existing contact or add a new one

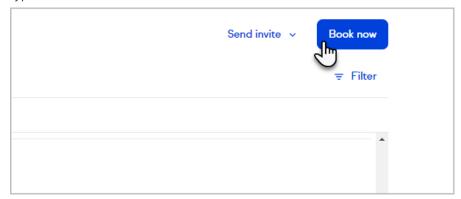


- 5. Edit message as needed
- 6. Click Send

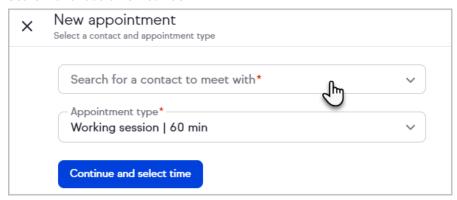


Book an appointment on your calendar

1. Click the Book now button above your daily schedule or by on appointment type



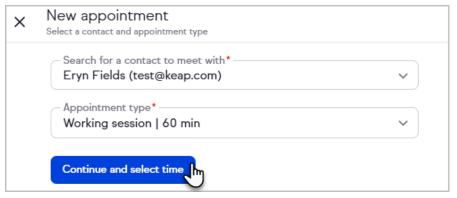
2. Search for or add a new contact



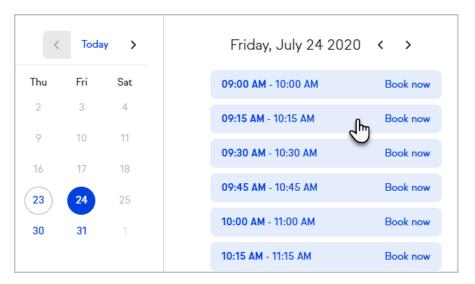
3. Select the appointment type



4. Click Continue and select time



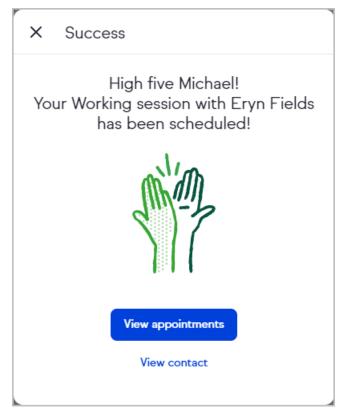
5. Select a date and time to book



6. Click Confirm



7. Choose to view your appointments, view the contact you just booked, or close the success window



Appointment reminders

When you use Keap Appointments, your invitees will automatically receive reminders 24 hours and 1 hour before their appointment. You can customize these reminders in Easy Automations by changing the frequency or content of the reminders.

