

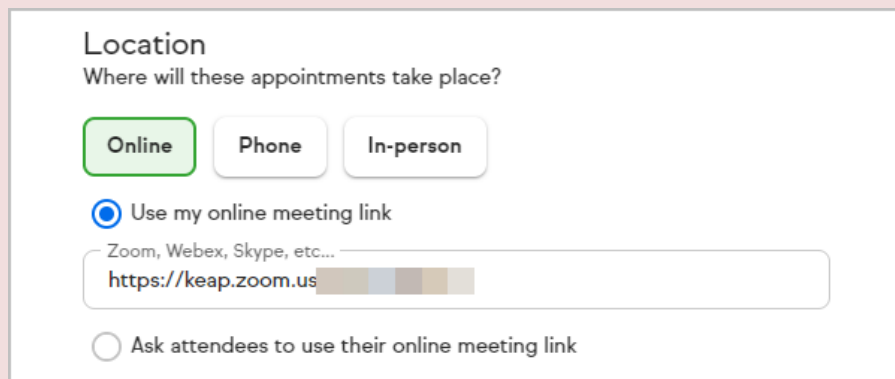
Appointment Managers (Multi-User Appointment Management)

This article applies to:

[Pro](#)

[Max](#)

6/26/2024 - Please note: Temporarily, the Zoom integration will not automatically add the Appointment Owner's information when setting up a new appointment type or when editing an existing appointment. The Zoom hyperlink will need to be added to the text box manually. This issue will be resolved shortly.



An Appointments Manager can manage appointments for other users that have given consent to access their calendar. Your Keap Service Partner or any user with a Manager Role or higher can now create/view/edit other user's appointment types in Keap. They will be able to use other's appointment types in several places (like automation or any place where you can attach a booking link). In order for the appointment manager to access a user's calendar, the user must first sign in to their Google or Outlook calendar and share it with the appointment manager.

To share your calendar with the appointments manager

- [Share your Outlook calendar](#)
- [Share your Google calendar](#)

Once your Google calendar or Outlook calendar has been connected to Keap, you will set up the booking pages for you or your team. In this article, you will personalize the attributes of the appointment day and time they can book.

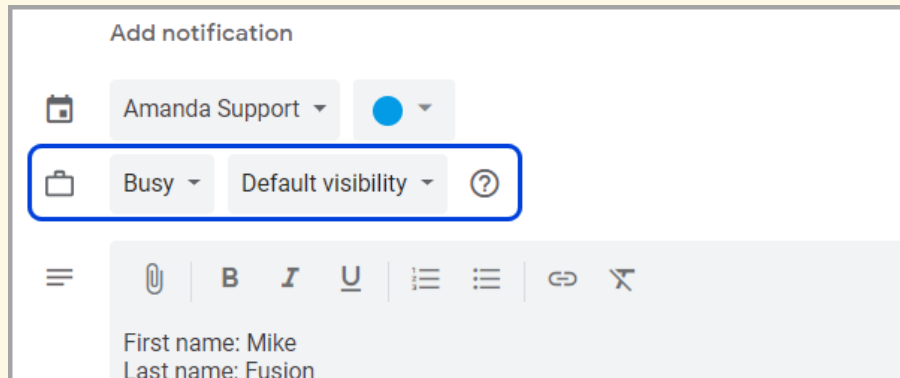
Note: To create Appointment Types and Booking Links for other team members they must have previously shared their Outlook or Google Calendar with you. See above.

- Set the appointment location, the days and times of the week that clients can schedule with your or your team members

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

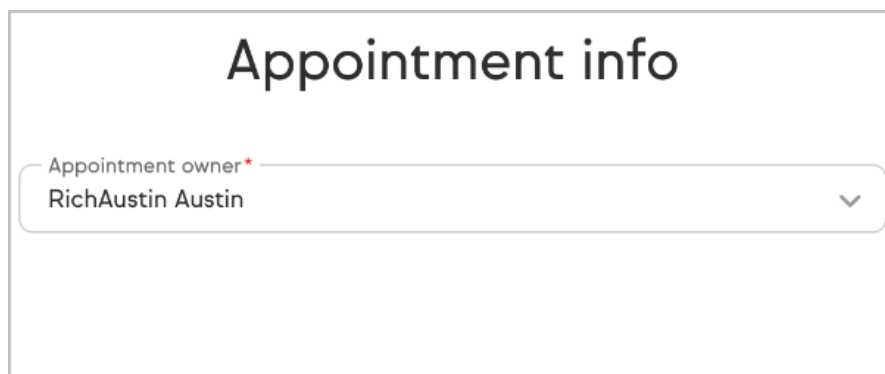
1. [To share your calendar with the appointments manager](#)
2. [Setting appointment preferences](#)
3. [Access embed code from individual booking link](#)
4. [FAQs](#)

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. Select the user you wish to assign the Appointment Type to (Note that if you have no team members that have shared calendars with you, you will skip this step and the Appointment Type will be assigned to you by default)



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

Name
What do you want to name your appointment?

Name
Free Consultation

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

<https://letsmeet.io/inconsulting/free-consultation>

3. 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

4. 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://keap.webex.com/>

☐ Let the invitee choose a meeting link

5. 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

6. 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 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

7. 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

8. 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).

9. 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.

10. Click **Next**

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

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

Duration

Appointment duration

30 minutes

1 hour

90 minutes

2 hours

Custom

13. 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

14. 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?

15. 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

16. 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* 09:00 AM - End time* 05:00 PM 

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


Start time* 09:00 AM - End time* 05:00 PM 


Start time* 05:00 PM - End time* 06:00 PM 


Start time* 06:00 PM - End time* 07:00 PM 

[+ Add timeframe](#)

18. Click the trash bin button to remove a timeframe

Start time* 09:00 AM - End time* 05:00 PM 

Start time* 05:00 PM - End time* 06:00 PM 

Start time* 06:00 PM - End time* 07:00 PM 

[+ Add timeframe](#)

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

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

Pre-appointment instructions

Need to give your contact instructions about the appointment? This will display on the [booking confirmation page](#)

Appointment instructions...

Please review the instructions in the email prior to our meeting. Thank you!

Let your contact know what they should bring or prepare for the appointment

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

confirmed

This information was also sent to your email (sallywilson@gmail.com)

Pre-appointment instructions

Please take a look at my website before our meeting. Looking forward to hearing your ideas!

What

60 min appointment with Sloan Jackson

When

Wed, Feb 12th, 2019

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

Google Calendar

2-way sync between Keap and Google Calendar.

Connected

Which calendars should we use to determine availability?

☒ ☐ ☐ ☐ ☐

☐ New Orleans Saints

☐ Holidays in United States

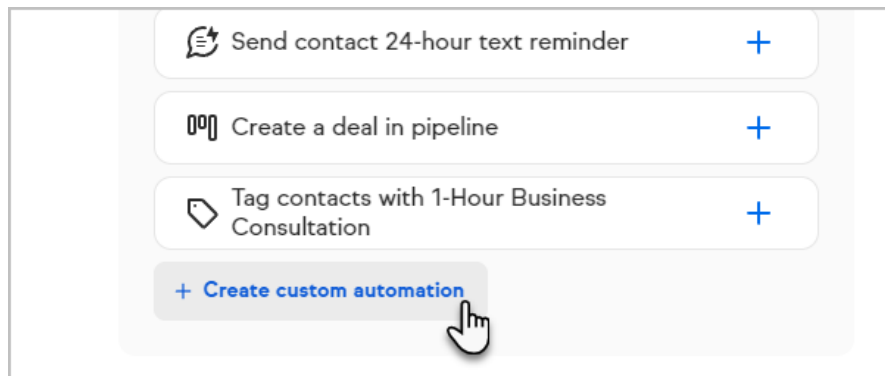
☐ Business Only

☐ Birthdays

☐ Pendo Calendar

Add new appointments to

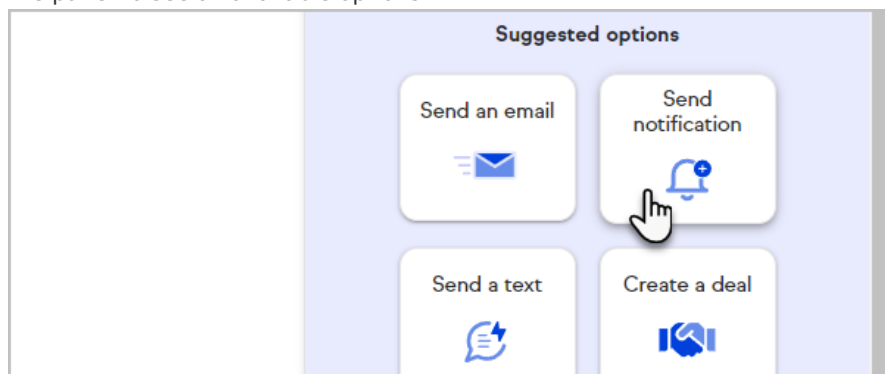
23. (optional) Select from an existing Automation, or click **Create custom automation**



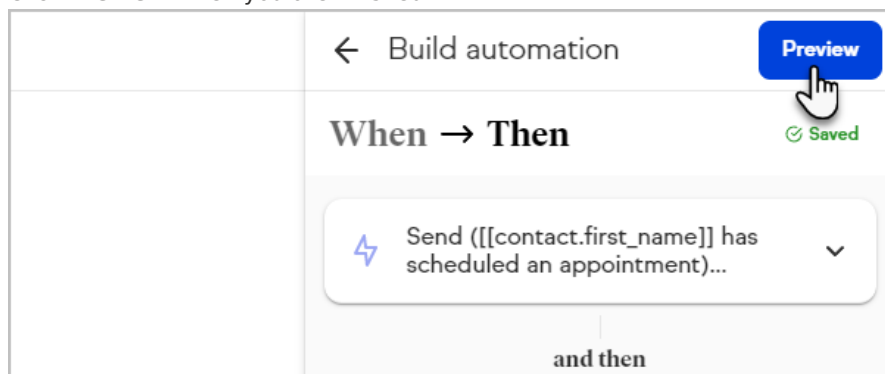
24. Click the **Then** card, and select what action you would like to take place once a consultation is scheduled.



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.



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



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

Build automation ✓ Saved **Publish**

Automation name ^{*}
Appointment: Free Consultation 2

When
(Free Consultation 2) is scheduled

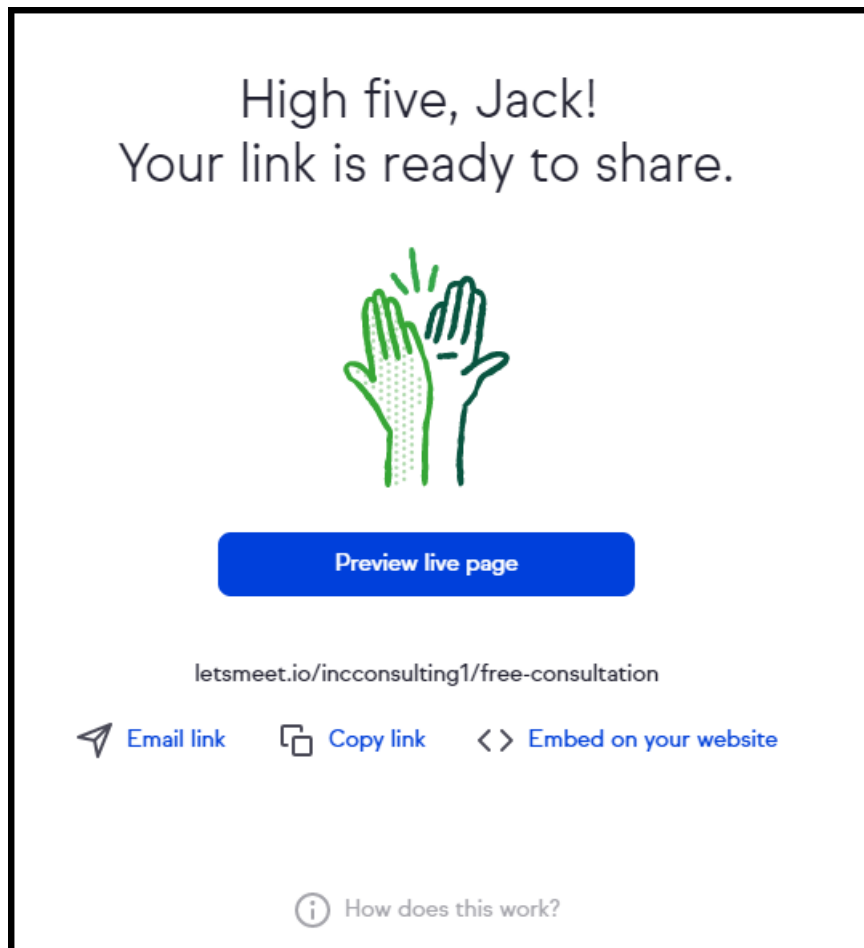
28. Click the **Close** button to close the panel, and then click **Finish** in the upper right hand corner.

Close [Go to automations →](#)

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

Done

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.



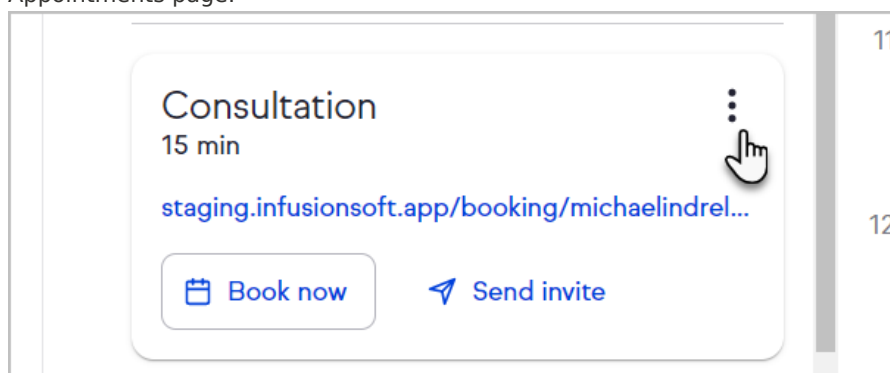
31. Click **Done** in the upper right hand corner

Pro tip! Your booking page knows when it is Daylight Savings, so you will see different times if the dates viewed are after a time change.

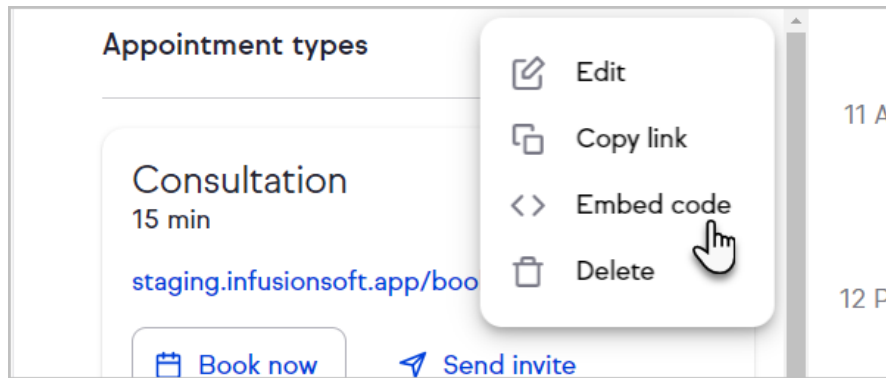
[CLICK HERE](#) to learn how to embed code on the 3 most popular website platforms (WordPress, Wix, and Squarespace)

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



FAQs

- We currently do not auto-sync new or edited (name) calendars. The user who connected the account originally will have to disconnect and reconnect for Keap to get any new or changed (name) calendars from Google or Microsoft.