

Calendly



Calendly is a powerful tool designed to help you simplify the process of scheduling meetings, appointments, and events. Whether you're running a business, conducting interviews, or managing client consultations, Calendly can help you avoid the back-and-forth emails and scheduling conflicts that often arise. In this chapter, we'll explore how to use Calendly effectively to optimize your scheduling process and improve your workflow.

● Consultation

[Copy link](#)[Add times to email](#)[Share](#)

This is a preview. To book an event, share the link with your invitees.



Michael Mizerski

Consultation

 30 min


 Add a location for it to show here


Select a Date & Time

< February 2025 >

MON	TUE	WED	THU	FRI	SAT	SUN
					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		

Time zone

 Central European Time (14:51) ▼

 Troubleshoot

Getting Started with Calendly

Before you can start using Calendly, you need to create an account. The process is simple, and you can sign up either using your email address or a Google, Microsoft, or Apple account.

- Go to [Calendly's website](#).
- Click on the "Sign Up" button in the top right corner.
- Choose how you want to create your account (email, Google, Microsoft, or Apple).
- After signing up, you'll be directed to your Calendly dashboard where you can start setting up your availability.

Setting Up Your Calendly Account

Once you've signed up and logged into your Calendly account, you'll need to configure a few key settings to make sure the tool works best for you.

Availability

[Default schedule](#)[Holidays](#)[Calendar settings](#)


Calendar settings

Set which calendars we use to check for busy times

Calendars to check for conflicts


+ Connect calendar account

These calendars will be used to prevent double bookings

Google Calendar
michael@mizific.com
Checking 1 calendar

×

Calendar to add events to

Google Calendar
michael@mizific.com

▼

To prevent double bookings and ensure that your availability is always up-to-date, Calendly integrates with popular calendar platforms like Google Calendar, Microsoft Outlook, and iCloud.

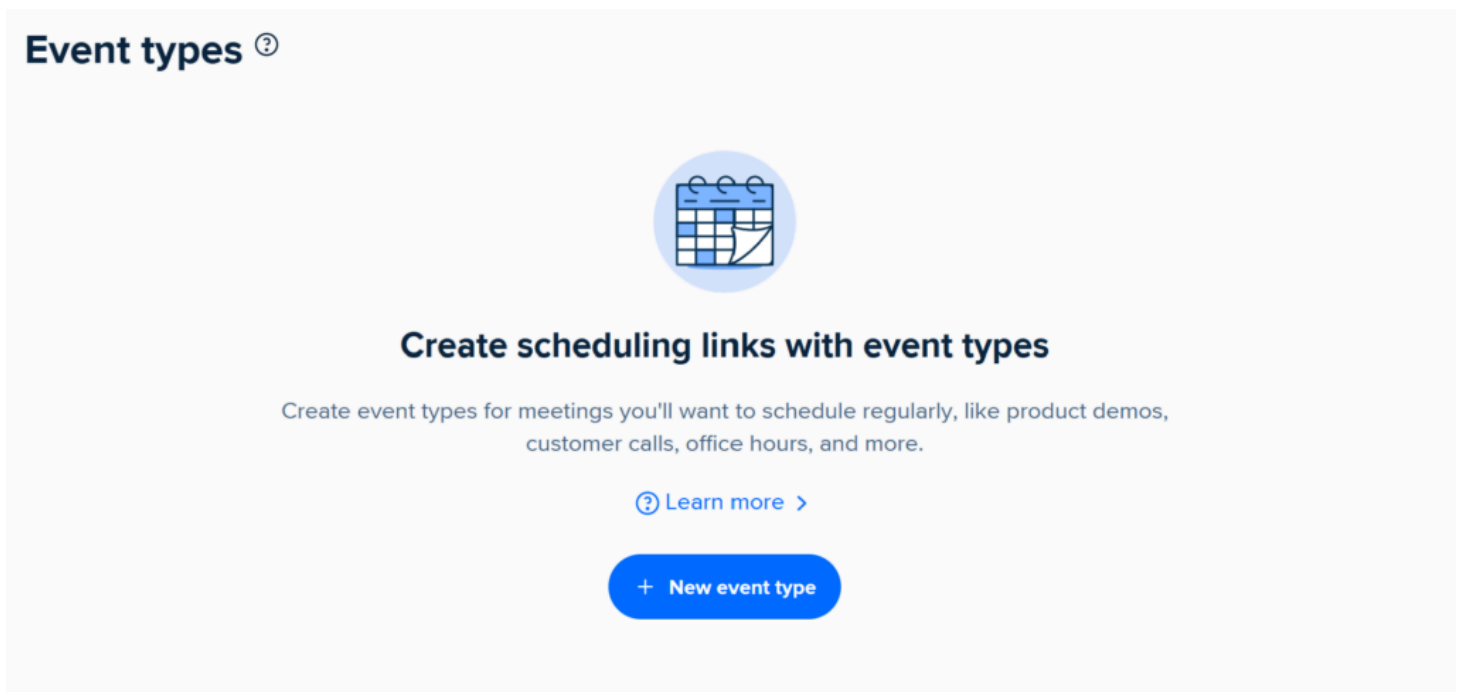
- Go to the "Integrations" section of your settings.
- Choose your preferred calendar provider (e.g., Google Calendar).
- Sign in and grant Calendly permission to access your calendar.

- Calendly will automatically sync with your calendar, displaying your availability and blocking out any time that's already booked.

Ensure that you set the correct time zone in Calendly to avoid any confusion when scheduling across different time zones. Calendly will detect your current time zone by default, but you can adjust it manually if needed.

Creating Event Types

Calendly is built around the concept of Event Types, which are the different kinds of appointments or meetings you offer. Whether you want to book consultations, team meetings, or product demos, each event type can be customized based on your needs.



We're only using Calendly to make it easier for prospects to find a time with you, instead of having a back and forth trying to find the right time and date, it's better to send you Calendly link and let your prospect choose a time.

To create an event:

- On your dashboard, click "Event Type" and select "Create Event Type".
- Choose the event type (Use 1:1).
- Name your event (e.g., "Client Consultation").
- Set the duration (I recommend no more than 15 min).
- Customize the location (e.g., in-person, Zoom, phone call, etc.).
- Set your availability for this event type, either by specifying specific hours or syncing it with your calendar.

Sharing Your Calendly Link

Once your event types are set up, it's time to share your scheduling link with your prospects, clients, or colleagues. Calendly makes this incredibly easy, allowing you to share your link through multiple channels.





To share your Calendly link:

- On your dashboard, click "Share Your Link" to copy your personalized URL.
- Send it via email, social media, or embed it directly on your website.

Automating Notifications and Reminders

Calendly doesn't just help you schedule meetings – it also allows you to automate reminders and notifications, reducing the chances of no-shows and ensuring everyone stays on the same page.

Basic notifications ⓘ

 Calendar invitation	⋮
Immediately after booking	
 Email reminders	Off ⋮
 Text reminders	Off ⋮
 Email follow-up	Off ⋮

To ensure that your invitees don't forget about their scheduled appointment, you can set up automatic reminders and follow-ups. You can choose to send these via email or SMS.

- Under the "Notifications" section of your event type settings, choose when to send reminders (e.g., 24 hours before, 1 hour before).
- Calendly will automatically send reminders for you, helping reduce cancellations or no-shows.

Once an event is booked, Calendly sends a confirmation email to your invitee with all the details of the meeting. You can customize this email with a personalized message or add additional information.

Advanced Features of Calendly

As you get more comfortable with Calendly, you may want to explore its advanced features, such as Custom Branding and Payment Integration.

Calendly allows you to customize your scheduling page with your company logo, colors, and branding elements. This provides a seamless experience for your clients or prospects while maintaining a professional image.

- Under "Branding", upload your logo and adjust the color scheme to match your company's branding.

If you need to charge for meetings or consultations, Calendly integrates with payment platforms like Stripe and PayPal. You can set a price for your event types, and invitees will be prompted to make payment when booking their time.

- In your event type settings, enable the Payment Integration option.
- Choose whether to accept payments for all events or just specific ones.