

## Calendly Quickie Set Up

Calendly is a scheduling software for organizing meetings and appointments between individuals and their colleagues, and between businesses and their clients or customers. Rather than email chains and phone tags, you can send your availability with a Calendly link (even if the people booking time with you don't use Calendly).

It is very easy to use. All you need to do is to set your availability preference and share the link with your clients and let them pick a suitable time for the event which will automatically get added to your calendar.

### Calendly Plans

To get started you just need the free plan, which includes unlimited events but only one type of event. The different plans are as follows:

- Free – unlimited events and only one type of event and where users can integrate with one other calendar, for example Google Calendar
- The Premium plan - gives you more customization options, allows you to schedule all types of events and removes Calendly branding from your display, (\$8/user/month).
- The Pro Plan - adds SMS notifications and invitee redirections, plus more native integrations, (\$12/user/month).

### Setting up your Calendly profile in 1 hour or less

#### A. Creating an Account

1. Creating an account on Calendly is very easy. Sign up with your email on <https://calendly.com/signup>.

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Sign up with Calendly for free

Enter your email to get started.

Already have an account? [Log in.](#)

English ▾

You can also sign up with your existing Gmail account.



Hi! You're signed in as [you@gmail.com!](#)

The easiest way for you to sign up is with Google. This will automatically connect your calendar so you can start using Calendly right away!

Prefer to create an account with a password?  
[Click here.](#)

2. After signing up with your email address, you will have to connect your Calendly account with your calendar platform. You can connect Calendly with all the main digital calendar platforms: Google Calendar, Office 365, Outlook Calendar, and iCal. But if you are using the free version then you will be able to connect with only any one of these calendars.

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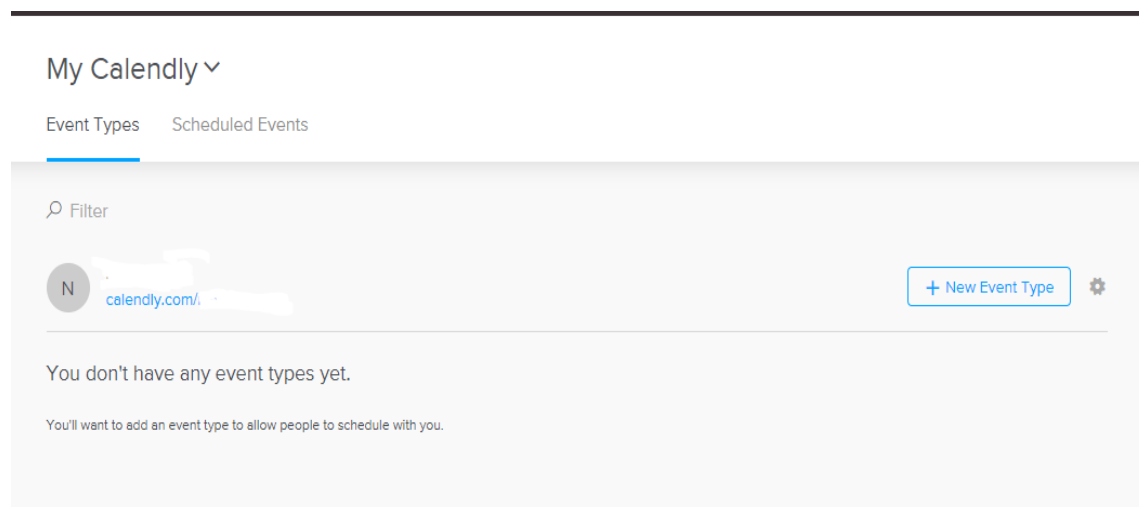
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You're on a new platform that's asking for permission to see your entire schedule. But, Calendly has a strict privacy policy. It's only interested in making sure that your scheduling works and that you're not going to be double-booked. The more calendar information you share with Calendly, the more smoothly your scheduling will work and the less likely you are to find that you have a clash.

## B. Connecting Your Calendar to Calendly

1. Before you've connected your calendar, you'll be presented with a page that looks... well, pretty empty. You'll have created no event types and no one will have scheduled events with you.



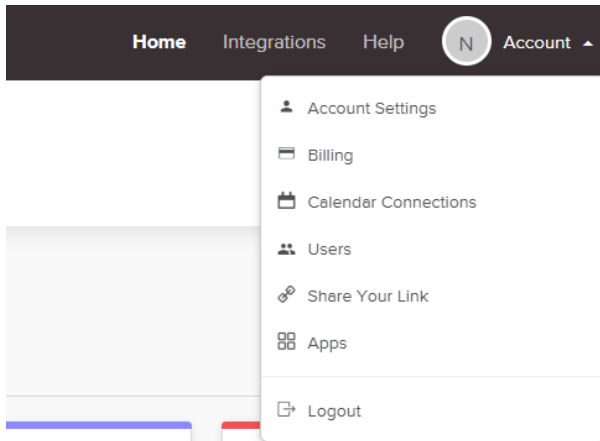
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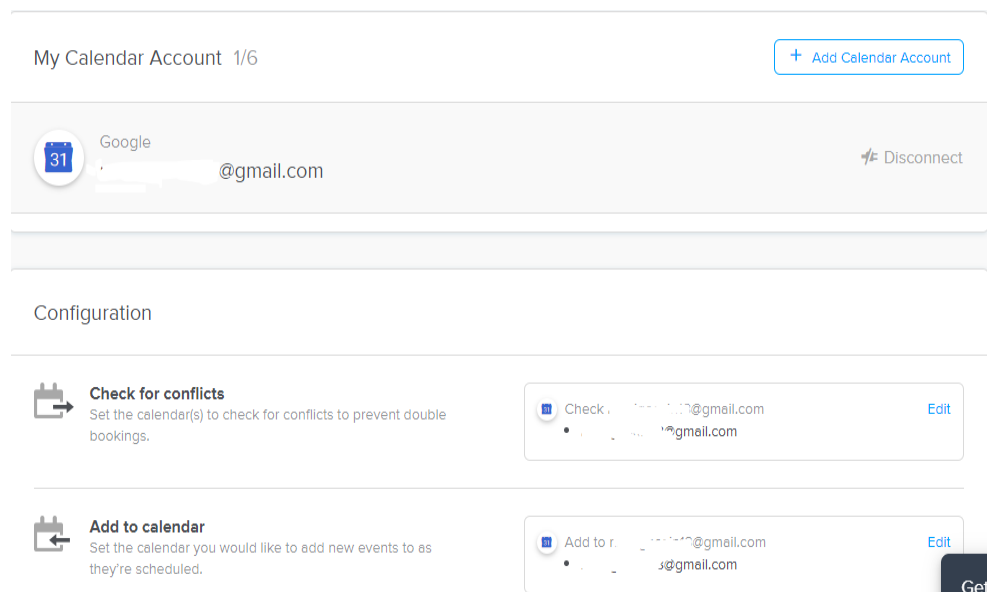
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2. Click the arrow next to your name at the top-right corner, and select “[Calendar Connections](#)”



3. Here you can see which calendar you've already connected, and you can add schedules that Calendly hasn't scanned—such as birthdays or holidays.



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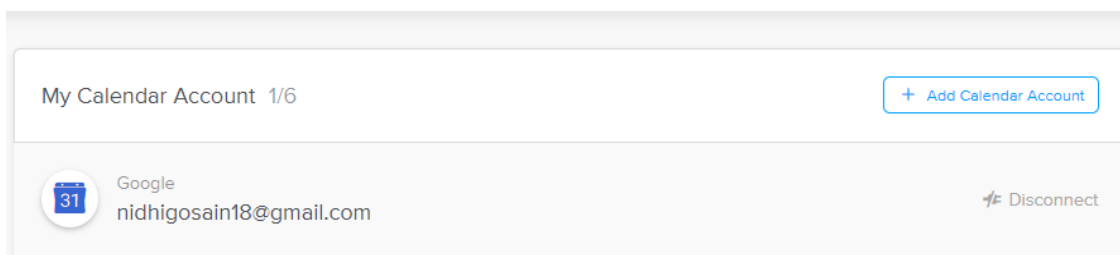
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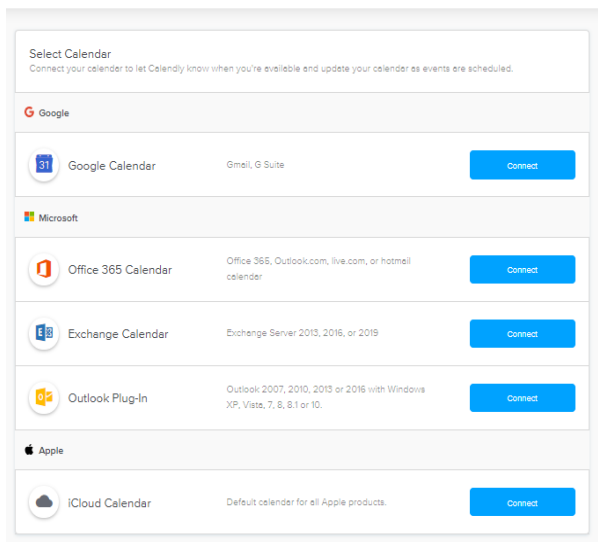
4. First, while you can see the calendar that you've already connected, you can also change your calendar, and you can disconnect your calendar. So if you've been using Google Calendar but have now switched to Apple Calendar or Outlook Calendar, you'll be able to switch your schedules. You can also disconnect your calendar here.

## Calendar Connections



5. The next option is the list of calendars you want Calendly to scan. There are a few good reasons for not checking all of them. Remember that users can't see these calendars. They can only see whether you're available at the times listed on those calendars. With the free account you can connect to only one calendar.

## Calendar Connections



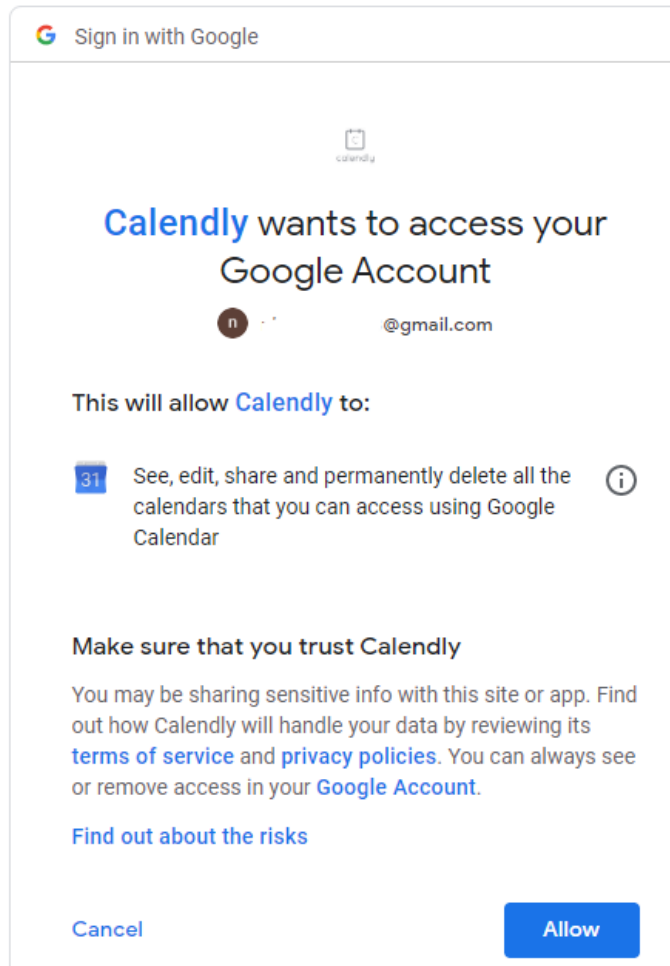
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You need to give permissions to Calendly in order to connect with the account.



You should also make sure that the green slider on the right, opposite “Check calendar for conflicts,” is switched to “Yes.” That’s the switch that makes sure that Calendly is checking those schedules before placing an event on your calendar.

6. The switch next to “Add new events to calendar” is just as important. Push this switch to “Yes”, and every time someone makes a booking using Calendly, that event will be added to your calendar. That doesn’t just save you

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the time and hassle involved in doing it yourself. It also makes sure that that time isn't double-booked.

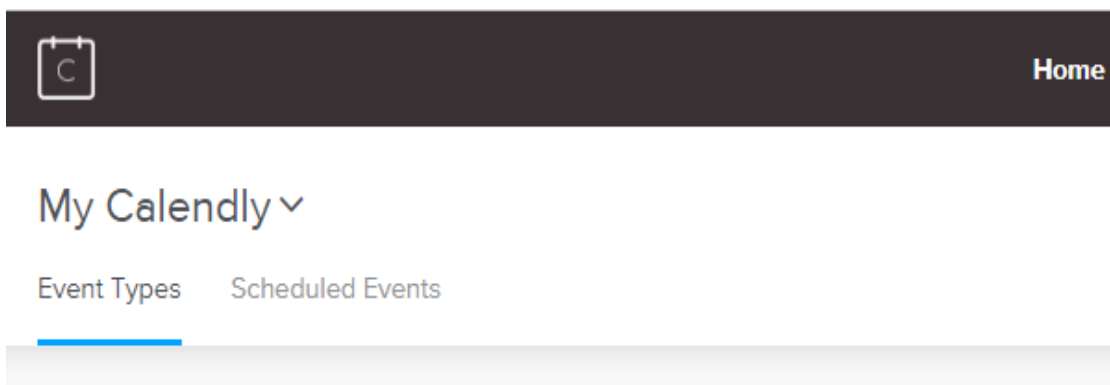
7. You can also choose the calendar to which you want those events added. *One useful technique then is to create a calendar on your calendar platform specifically for these events before you begin using Calendly.* That will allow you to see these events separately on your calendar.
8. The last option is a checkbox to sync cancellations. Cancel an event in your calendar and it will be deleted in Calendly, and vice versa. All the parties attending the meeting receive a notification automatically. You want to check that box too.

Finally, press "Save Changes," and you'll be ready to go!

## C. How to Create an Event or Meeting Slot in Calendly

When using Calendly, think of Events as time slots. You define how those time slots are used and who sees them—and that's the real value of Calendly.


1. From your Calendly dashboard (your Account page), click the tab for Event Types if you're not there already.



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## 2. Click on + New Event Type.

My Calendly 


Event Types   Scheduled Events

Filter



N calendly.com/r



+ New Event Type 

## 3. Choose the Event Type that you wish to create.

 Create New Event Type

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 **One-on-One**  
Let an invitee pick a time to meet with you. 

 **Group**  
Let multiple invitees meet with you at one time. 



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- This first window of the event editor asks for basic information: the name of the event, location, and description. It also gives you the opportunity to customize the event URL and color-coding. For group events, you also specify the maximum number of attendees.

The screenshot shows a web form titled "What event is this?". At the top right, there are "Cancel" and "Next" buttons. The form contains several sections:

- Event name \***: A text input field containing "Soul to Soul Business".
- Location**: A dropdown menu showing "Phone call" with an "Edit" button and a close icon. Below it, a link says "Want to offer choices to your invitee? Add a location option".
- Description/Instructions**: A rich text editor with a toolbar (undo, redo, bold, italic, underline, list, link) and a text area containing the placeholder "Write a summary and any details your invitee should know about the event."
- Event link \***: A text input field showing "cclendly.com/" followed by a dropdown menu with "soul-to-soul-business".
- Event color \***: A row of ten colored circles (red, pink, purple, blue with checkmark, cyan, green, lime green, yellow, orange).

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- In the next window, you'll set the duration of the event itself, as well as how long people can sign up for the event.

When can people book this event?  
30 min, 60 rolling days Cancel Next

**Event Duration \*** ?

15 min	<b>30 min</b>	45 min	60 min	- custom min
--------	---------------	--------	--------	--------------

**Date Range** ?  
Events can be scheduled over 60 rolling days [Edit](#)

**Event Time Zone** ?  
 You're in India Standard Time. Your invitees will see your availability in their local time zone. [Edit](#)

**Availability** ?  
Set your available hours when people can schedule meetings with you.

- Below that, you can customize your availability for the event if it's different than your default.

Hours **Advanced** Copy availability from... ▾

24 May - 6 June 2020 ◀ ▶ 📅

Sun	Mon	Tue	Wed	Thu	Fri	Sat
24	<b>TODAY</b> 9:00a - 5:00p	26 9:00a - 5:00p	27 9:00a - 5:00p	28 9:00a - 5:00p	29 9:00a - 5:00p	30
31	<b>1 JUN</b> 9:00a - 5:00p	2 9:00a - 5:00p	3 9:00a - 5:00p	4 9:00a - 5:00p	5 9:00a - 5:00p	6

[Show more ▾](#)

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7. Clicking on an individual date in the calendar opens up a new set of options. Here, you can enter a specific time range for that date only or for that day every week (e.g., every Monday).

### Edit Availability

**From**  - **To**  

[+ New Interval](#)

[Or apply to multiple...](#)

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8. Choosing or applying to multiple... at the bottom opens further options, such as applying a new range to select days only. And clicking the Advanced tab on the top of the calendar brings up even more detailed customization options. Here you adjust the frequency of events, establish a maximum number of events per day, input a cut-off time for last-minute scheduling, and set a built-in buffer time before and after events.

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Hours    **Advanced**    [Copy availability from...](#) ▾

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**Availability Increments**

Set the frequency of available time slots for your invitees.    Show availability in increments of

30 min ▾

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**Event Max Per Day**

Use this optional setting to limit the number of events that can be scheduled in a day.    Max number of events per day

---

**Minimum Scheduling Notice**

Use this setting to prevent last minute events.    Prevent events less than

hours away

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**Event Buffers**

Use this to set aside preparation, rest or travel time before or after events. For example, if you define a 5 minute buffer before your events Calendly will make sure you have 5 minutes of free time before your scheduled events.

Buffer before event

▾

Buffer after event

▾

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9. You also have the ability to hide the event from your public schedule (for when you share your entire calendar with someone), a feature known as Secret Event. To activate it, click on the button (the default is No, but it changes to Yes when clicked).

Secret Event 

Hide this event from your main Calendly page?

YES

10. When you're ready, click Save & Close in the bottom-right to save your data and close the window. Note: Your event is still not finished. To make the event public (or active, if you're using a Secret Event), you have to turn it on by clicking the button in the upper-right corner of the event editor.

[< Back](#)


Add One-on-One Event Type


Your event type is  ON

Invitee language - English 

Last edited 25 May 2020.

[view live page](#)

 What event is this?  
Soul to Soul Business

 When can people book this event?  
30 min, 60 rolling days

You are ready to go now!!

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