



Using Calendly for scheduling: What you need to know

What is Calendly?

Calendly is scheduling software that helps you easily find open times for appointments. It works with your Google, Outlook, Office 365, or iCloud calendar to ensure you're never double-booked.

Calendly offers free and paid options. When you use the free service, you can create only one event type to schedule. Calendly's paid plans allow for many more options to customize your settings and appointment types.



Ruby works seamlessly with Calendly. We can...

- Use Calendly links for individual teams, employees, specific call types, and different meeting lengths.
- Use "secret" Calendly links that don't show up on your customers' views of any webpage (these links would be reserved for Ruby to schedule with).
- Request a caller's name, email address, and other basic information for an appointment.
- Book appointments right away when speaking with callers or offer to schedule appointments when members of your team aren't available.



For HIPAA-compliant customers: Calendly does not meet the necessary communication security requirements for Protected Health Information, and therefore cannot be used in conjunction with [HIPAA compliant Ruby service](#). However, if you have a HIPAA-compliant scheduling platform you'd like to use instead, we're happy to look into it and determine if we're able to add scheduling capabilities to your account. You can read more [here](#).



How do I set up Calendly?

Start by signing up for an account at this link: calendly.com/signup

After you sign up for Calendly, we recommend you check out their Getting Started guide, available [here](#).

To help you get your account ready for Ruby scheduling and make the most out of the service, we've pulled a few of Calendly's most helpful articles. Please make sure to read through the following before using Ruby and Calendly to schedule appointments:

- [Setting up your account and connecting your calendar](#)
- [Exploring your Calendly homepage](#)
- [Managing your account settings](#)
- [Understanding Calendly event types](#)
- [Setting up your first event](#)
- [Defining schedules and specifying your availability](#)
- [How Calendly handles time zones](#)
- Optional: [Customizing your confirmation page](#)
- Optional: [Setting up automatic notifications for event attendees](#)



Optimize your account for Ruby scheduling.

To ensure your Calendly account is optimized for Ruby's use, please do the following:

- ✓ **Lock your time zone.** Ruby has offices in Pacific Time and Central time, so it's important to lock the correct time zone for the appointments we make so that we will always make appointments in a single time zone of your choice. Click [here](#) for instructions on how to lock your time zone.

Alternatively, if you will have callers from different appointments booking appointments, we're happy to ask them which time zone they're in and change the time zone manually.

- ✓ **Please create no more than 8 appointment types.** We've found that more than this many appointment types hinders our receptionists' ability to accurately schedule appointments, as the screen becomes crowded and important information gets lost. You can work around this by providing Ruby with direct links to the specific appointment types you have—we'll use the appointment type suited to the caller we're helping.

Note: Calendly offers all new users a free two-week trial that allows users to create as many types of appointments as they want. However, after the trial ends, users with free accounts are restricted to only one type of appointment.

- ✓ **Set your same-day preferences.** If you don't want same-day appointments to be scheduled, please set up a "Minimum Scheduling Notice" time in Calendly that works well for you. This option can be found for each event under **When can people book this event?**
> **Availability** > **Advanced**. Creating a minimum notice guideline will prevent any surprises!

Get ready for scheduling with Ruby!

Once you've created your Calendly account, you're ready for Ruby to start scheduling your appointments! Send us the URL to your online calendar, along with your answers to the following questions, to assist us in setting up your scheduling call-handling instructions:

1. Will all appointments be set in the same time zone?
Is your scheduling platform locked into your time zone, or should receptionists fill in the time zone manually when scheduling?
2. In the event a caller declines to provide an email address or other required information, we won't be able to schedule. Similarly, if your form has an error, we may not be able to schedule. Our default action in these instances is to take a message for the caller instead. Where would you like us to send those messages—or would you like us to handle those calls in a different way?
3. In the event a caller asks to cancel or reschedule an appointment, we won't be able to manage your calendar to make that update. How would you prefer we field those requests? For example:
 - Most scheduling platforms allow you to cancel or reschedule your appointment via the confirmation email. We are happy to point your callers to this email in these instances.
 - We can also take a message letting you know a caller would like to cancel or reschedule.
4. Are there any expectations we need to set upon scheduling the appointment?
It's best to keep these concise and brief. For example:
 - Should they review their appointment confirmation email for instructions?
 - Should we be prepared to offer driving directions?
 - Do they need to bring anything to the appointment?

We'll review your calendar to make sure it fits within our guidelines and follow up with any questions we have.

Have questions or need more help? Click [here](#) to reach out to our Customer Happiness team!



Calendly glossary

Event: Calendly's term for an appointment.

Secret event: An event you hide from another person's (e.g. a customer's, visitor's, patient's, or client's) view of your Calendly page. This feature can be useful if you've published your main Calendly page for your clients to use directly, for example, but you'd like Ruby to have special access to different event types. [Learn more about secret events.](#)

Locked time zone: An option that binds Calendly's shown dates and times to a specific location. For instance, if an appointment type is locked into Pacific Time, then all date and time information about the event is expressed in Pacific Time to everyone, no matter where they're located.

Automatic time zone: Calendly's default time zone setting for event types. We kindly ask you not to use this option when scheduling with Ruby. This option automatically detects the scheduler's time zone based on their device's settings and defaults to that time zone when scheduling the event. This is troublesome for Ruby because Calendly will always default the event to a Ruby receptionist's time zone rather than the time zone of the caller trying to schedule the appointment.

Team page: A new, specific page that Ruby can use rather than your main Calendly home page. You can also create a team page if they'd like to link several individuals' calendars to one page. For instance, if your sales team is handling new consultations, you can set up a sales team page, and from there, Ruby can see open appointments for the whole team. [Learn how to create a team page.](#)

