

Calendly

A scheduling tool that seamlessly integrates with Google Calendar and allows you to share a unique link with students so they can schedule appointments with you. Calendly also offers integration with Zoom so meetings can automatically be scheduled as Zoom calls and easy rescheduling or canceling of meetings.

Calendly Account Set-Up

Go to calendly.com to set up your account. This is free (limited to one active scheduling event at a time).

Make sure you use your **USD email** to set it up so it will sync with your Google Calendar. It will ask you for permission to access your calendar – it is important that you grant such permission.



calendly

Features

Pricing

Integrations

Solutions

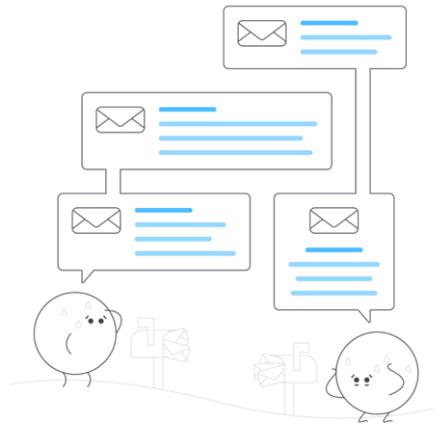
For Teams

My Account

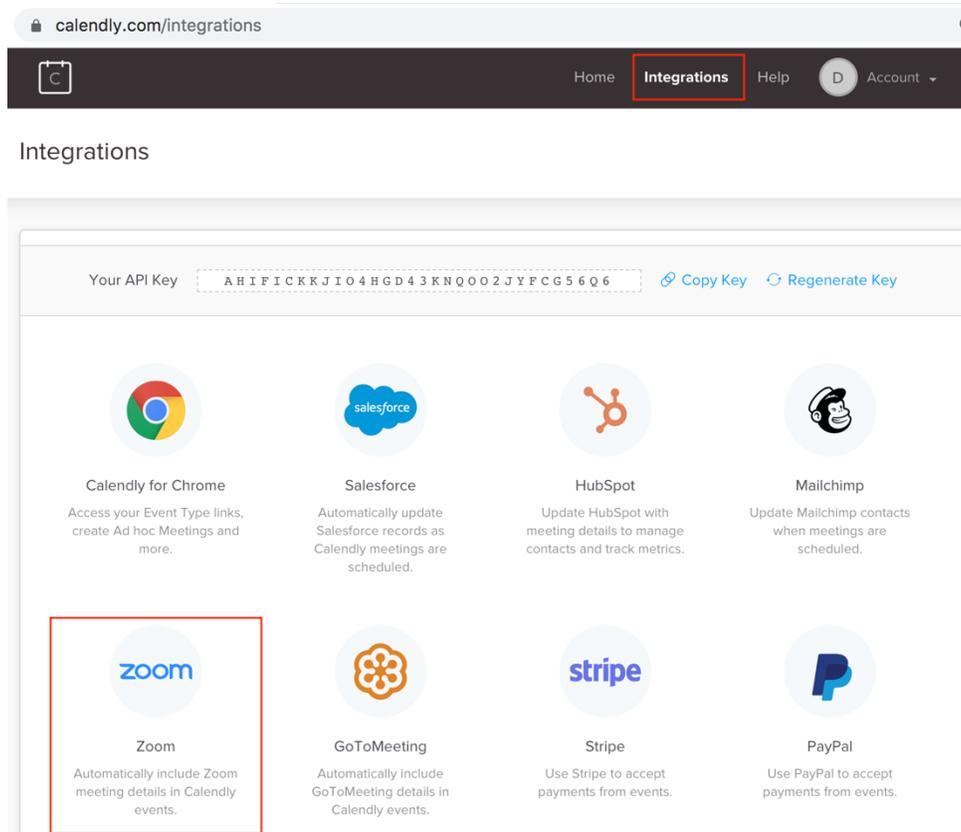
Calendly helps you schedule meetings without the back-and-forth emails

Sign Up

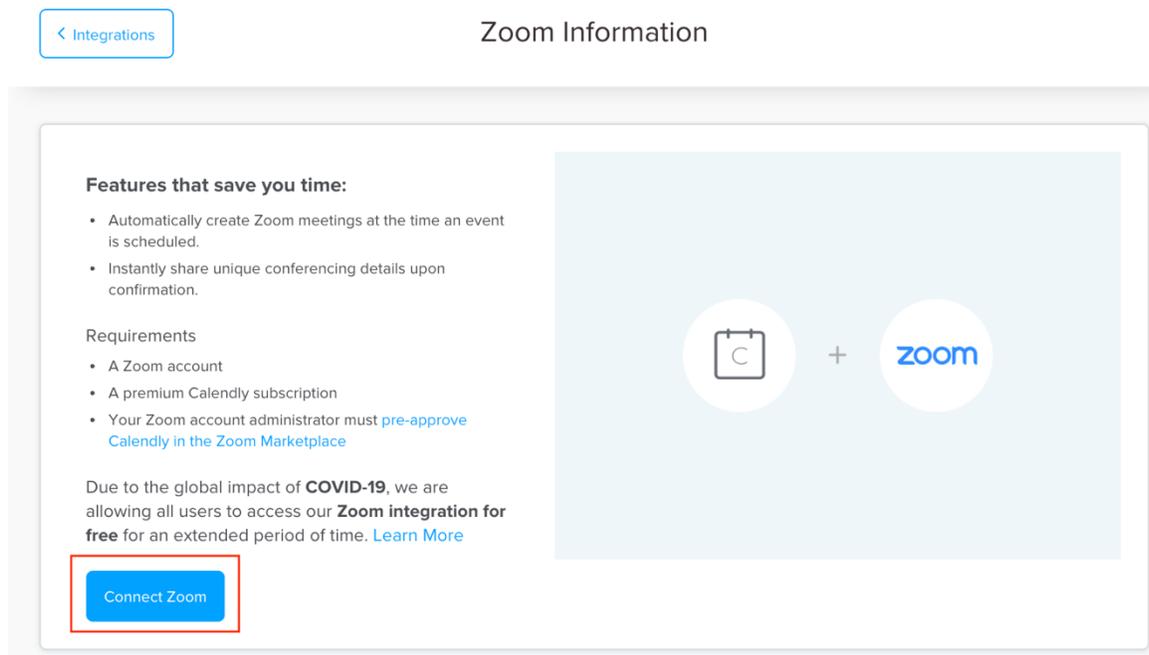
Get started for free. No credit card required.



Click on **Integrations** in the top navigation bar if you'd like your appointments to be automatically set up as Zoom meetings. You'll need to enable the Zoom integration. Click on the **Zoom** icon.



Click the **Connect Zoom** button.



Click the **Sign in with SSO** button. This will allow you to integrate with USD's single sign on (SSO).

Sign In

Email

Password

Sign In

or

 **Sign in with SSO**

 **Sign in with Google**

 **Sign in with Facebook**

Type **“sandiego”** (one word, no spaces, all lower case) into the field and click **Continue**.

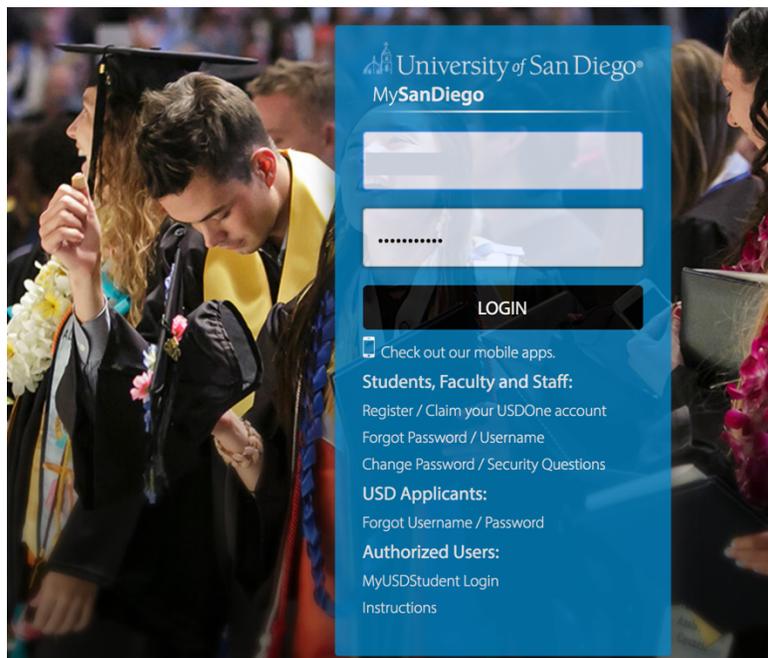
Sign in with SSO

This could be your company's name. e.g.
abc.zoom.us

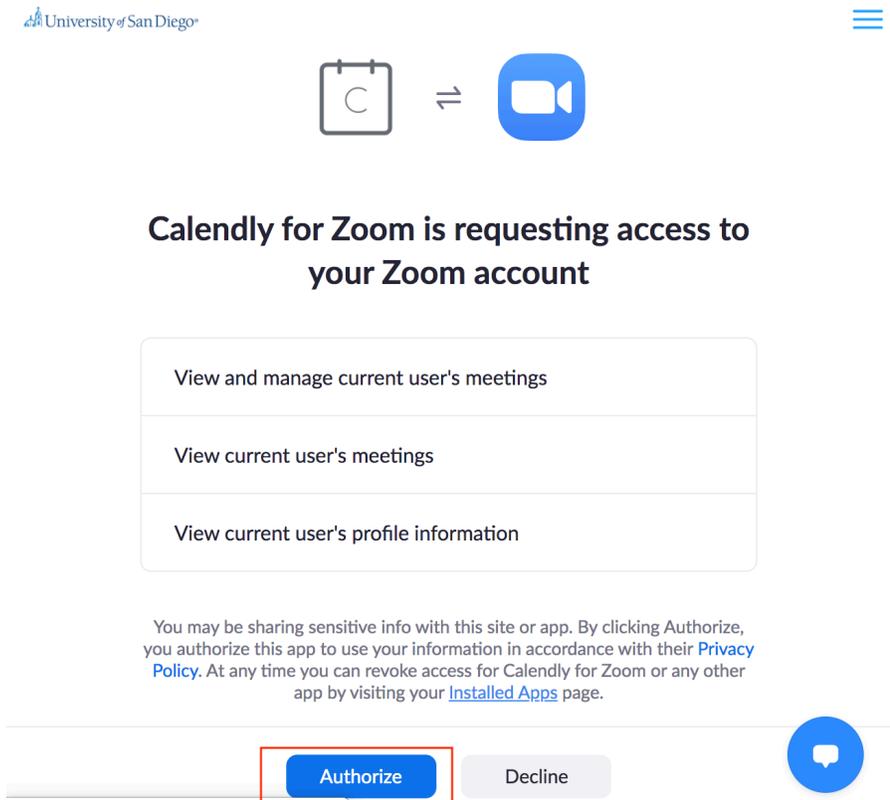
[I don't know the company domain](#)

Continue

This will then send you to USD's sign on screen. Enter in your **USD username** and **password**.



Click **Authorize** to authorize the Calendly-Zoom integration.



University of San Diego

Calendly for Zoom is requesting access to your Zoom account

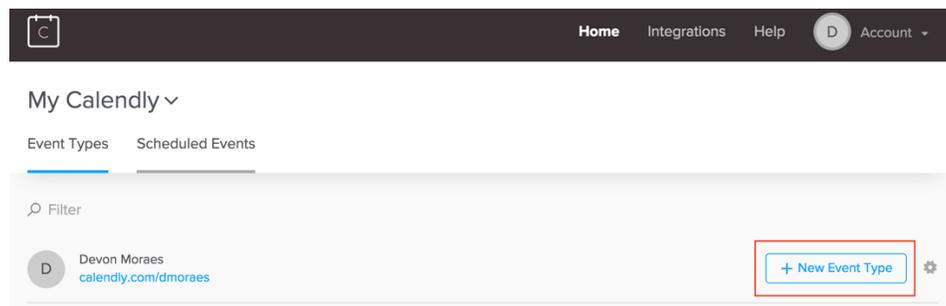
- View and manage current user's meetings
- View current user's meetings
- View current user's profile information

You may be sharing sensitive info with this site or app. By clicking Authorize, you authorize this app to use your information in accordance with their [Privacy Policy](#). At any time you can revoke access for Calendly for Zoom or any other app by visiting your [Installed Apps](#) page.

Authorize Decline

Event Set-Up

From the Home screen, create a **New Event Type**.



Home Integrations Help Account

My Calendly

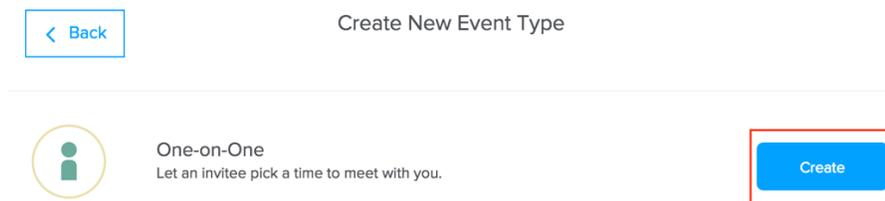
Event Types Scheduled Events

Filter

Devon Moraes
calendly.com/dmoraes

+ New Event Type

Select the **One-on-One** option.



< Back Create New Event Type

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

Create

Invitee language - English

view live page

What event is this? Cancel Next

Event name * ?

Location ?

e.g. Joe's Coffee, I'll call you, GoToMeeting, let invitee decide...
 Display location while booking
 Display location only after confirmation

Description/Instructions ?

Event link * ?
calendly.com/dmoraes/

Event color * ?

Cancel Next

Suggestions (modify these options accordingly)

Event Name: Example: **Advising Appointment** or **Office Hours**

Location: **Select Zoom in the dropdown menu**

Event link will auto-generate based on your Event Name

Click **Next**

● What event is this?
Schedule Review

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

[Cancel](#) [Next](#)

Event Duration * ?

15
min

30
min

45
min

60
min

-
custom min

Set for 20 min.

Date Range ?

Events can be scheduled over 60 rolling days [Edit](#) ← Bracket your general dates here.

Event Timezone ?

You're in Pacific Time - US & Canada. Your invitees will see your availability in their local time zone. [Edit](#)

Availability ?

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

Hours
Advanced
Copy availability from... ▾

Jul 1 - Jul 14, 2018 ◀ ▶ 📅

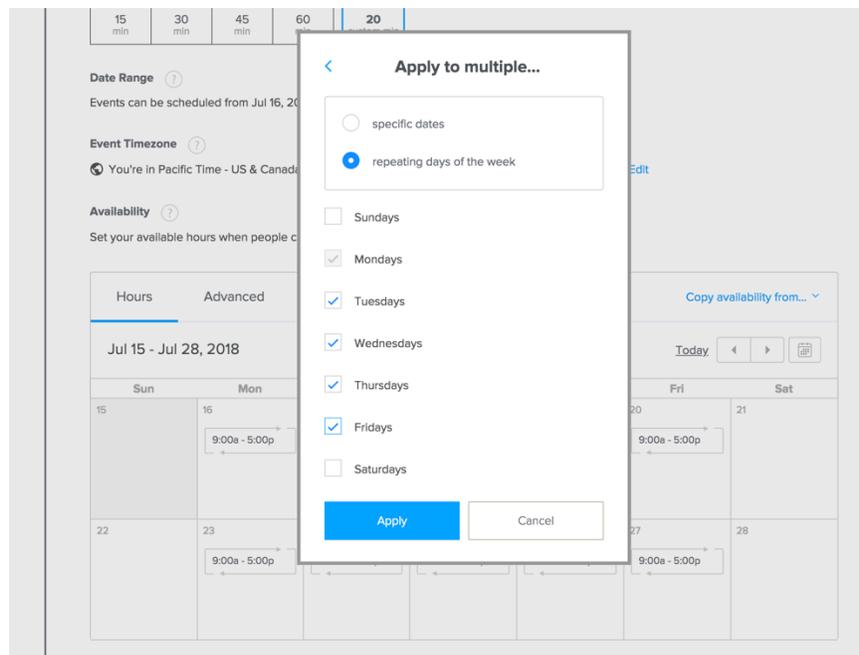
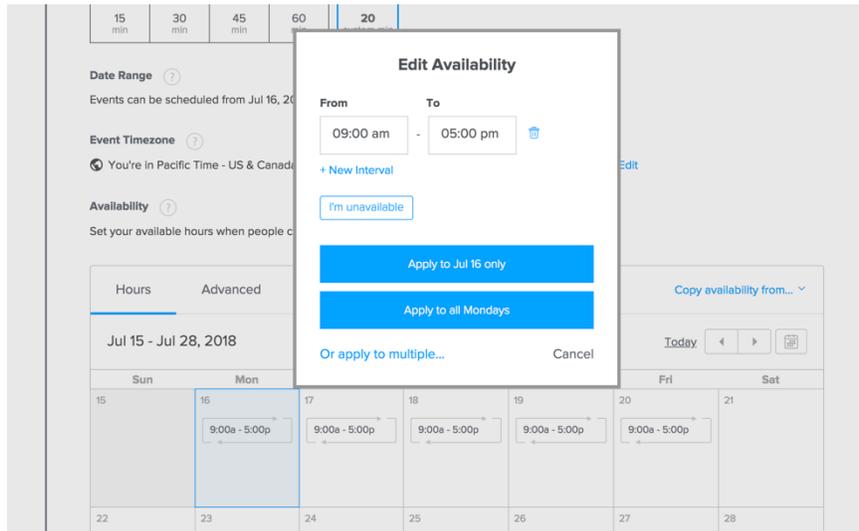
Sun	Mon	Tue	Wed	Thu	Fri	Sat
JUL 1	TODAY	3	4	5	6	7
	9:00a - 5:00p					
8	9:00a - 5:00p	14				

Show more ▾

The recommendation is to set 20-minute events. Use the “Event Duration” custom minute option to set **20-minute** appointments.

Under “Date Range” you can edit the date range you will be holding your appointments (i.e., from October 1 – November 30).

You can easily set your availability using this calendar by clicking on a day and editing the times for that day.



If you plan to be available during the same time(s) for certain or all days of the week, you can click on the **Apply to multiple...** option and select the days accordingly.

Once the general structure of your appointment schedule is set, click **Next**.

Note: Once the event set-up is complete, Calendly will automatically sync with your current Google Calendar and make you unavailable during previously scheduled appointments during those ranges meaning students will not be able to schedule an appointment with you if you are already busy.

Availability ?

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

Hours	Advanced	Copy availability from... ▼				
July 12 - July 25, 2020 Today ◀ ▶ 📅						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
12	13 10:00a - 7:00p	14 10:00a - 7:00p	15 10:00a - 7:00p	16 10:00a - 7:00p	17 10:00a - 7:00p	18
19	20 10:00a - 7:00p	21 10:00a - 7:00p	22 10:00a - 7:00p	23 10:00a - 7:00p	24 10:00a - 7:00p	25

On the **Advanced** tab at the top of the calendar, you can set event buffers (for example 5 minutes before and 5 minutes after) and other helpful scheduling preferences such as setting a Minimum scheduling notice (i.e., you can set this so you don't receive any same-day appointments).

Hours	Advanced	Copy availability from... ▼
Availability Increments		
Set the frequency of available time slots for your invitees.		Show availability in increments of
		<input type="text" value="30 min"/> ▼
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
		<input type="text"/>
Minimum Scheduling Notice		
Use this setting to prevent last minute events.		Prevent events less than
		<input type="text" value="12"/> hours away
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
		<input type="text" value="5 min"/> ▼
		Buffer after event
		<input type="text" value="5 min"/> ▼



Dashboard **Event Types** Help calendly.com/dmoraes

< Event Types Add One-on-One Event Type Your event type is OFF

Invitee language - English [view live page](#)

What event is this?
Schedule Review

When can people book this event?
20 min, Jul 16, 2018 - Aug 16, 2018

The free plan is limited to 1 event type.
[Upgrade your account](#) to unlock unlimited event types.

Additional Options

Invitee Questions
Name, Email

Invitee Notifications
Calendar Invitations, No Reminders

Add Custom Links
no active links

Collect Payments
no payment method

On the next screen, you can edit the **Invitee Questions** and add your own questions that students have to respond to when setting up an appointment with you. This will give you key information you may need to prepare for the appointment or allow you to reach out to the student ahead of time if an appointment is not necessary and their concerns can be solved in other ways.

Invitee language - English [view live page](#)

What event is this?
Schedule Review

When can people book this event?
20 min, Jul 16, 2018 - Aug 16, 2018

Additional Options

Invitee Questions
Name, Email Cancel Save & Close

Full Name *

Your e-mail address *

+ Add New Question

Invitee Notifications
Calendar Invitations, No Reminders

Add Custom Links
no active links

Collect Payments
no payment method

Recommendation to make **Student ID** a required field.

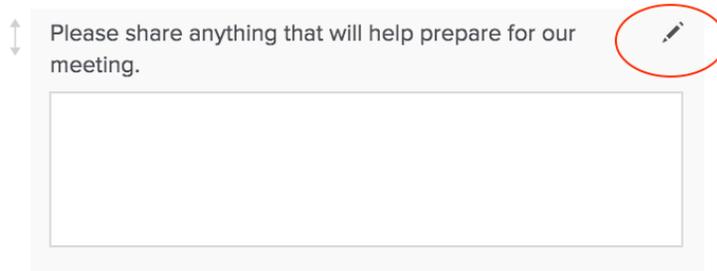
The screenshot shows a 'New Question' form. The question text is 'Student ID'. Below the text is a green 'ON' status indicator. To the right, a 'Required' checkbox is checked and highlighted with a red box. The 'Answer Type' dropdown is set to 'One Line'. At the bottom, there are 'Apply' and 'Cancel' buttons, and a 'Delete Question' link with a trash icon.

Make sure you check the **Required** box on the right-hand side. Then click **Apply**.

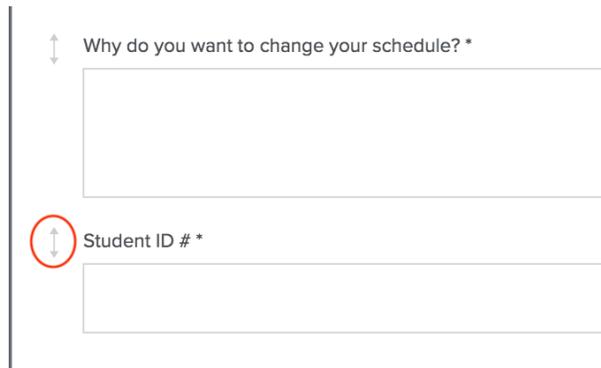
Recommendation to add a question asking students to detail the **reason they are setting up an appointment**. (Ex. Why do you want to change your schedule? or What's your biggest concern with your schedule?). For that you will want to allow them to type more than one line in for their answer. You can modify this by selecting **Answer Type**.

The screenshot shows a 'New Question' form. The question text is 'Why do you want to change your schedule?'. Below the text is a green 'ON' status indicator. To the right, a 'Required' checkbox is checked. The 'Answer Type' dropdown is set to 'Multiple Lines' and is highlighted with a red box. At the bottom, there are 'Apply' and 'Cancel' buttons, and a 'Delete Question' link with a trash icon.

The question “Please share anything that will help prepare for our meeting” is a default question. You can edit this to your liking or delete it by hovering over the question and clicking on the pencil icon.



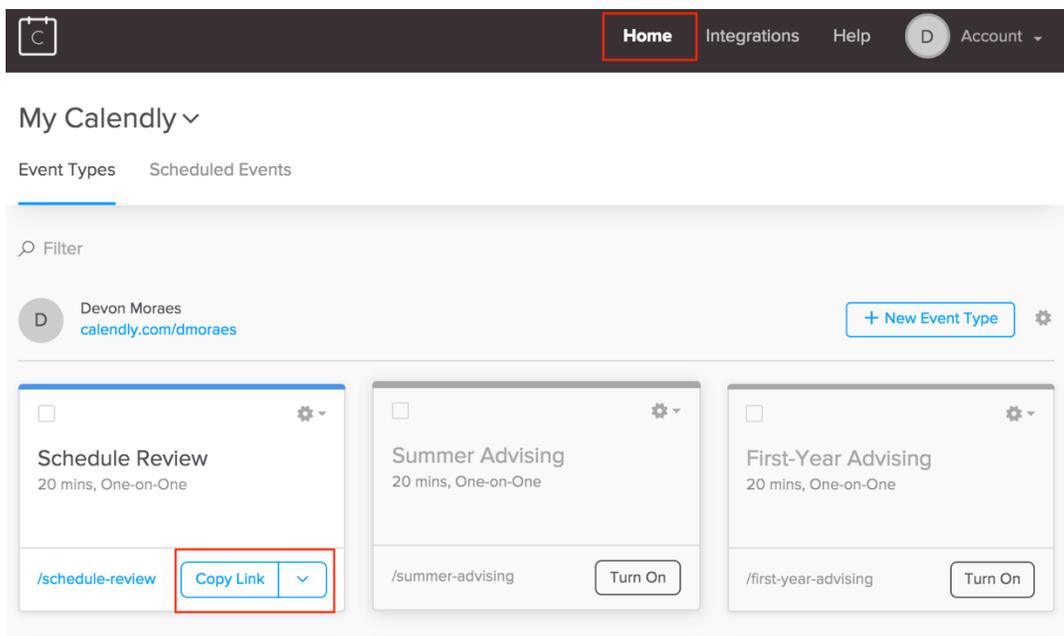
Reorder your questions using the arrows on the left-hand side of each question and dragging them up or down.



Once you have all your questions set up, click **Save and Close**.

Your account and advising event are set-up!

Your personalized link will default to **calendly.com/your USD username/advising-appointment**. You can also copy your unique event link from your home page.



You can also click **view live page** to see what your student's will see.

< Back

Add One-on-One Event Type

Your event type is OFF

Invitee language - English ▾ Last edited May 27, 2020. [View live page](#)

● What event is this?
Schedule Review

📅 When can people book this event?
20 min, Jul 16 - Aug 7, 2020

Additional Options

📄 Invitee Questions
Name, Email + 2 questions

You can always go back to edit your event settings options (gear icon) within your event from your Home page.

Home Integrations Help D Account ▾

My Calendly ▾

Event Types Scheduled Events

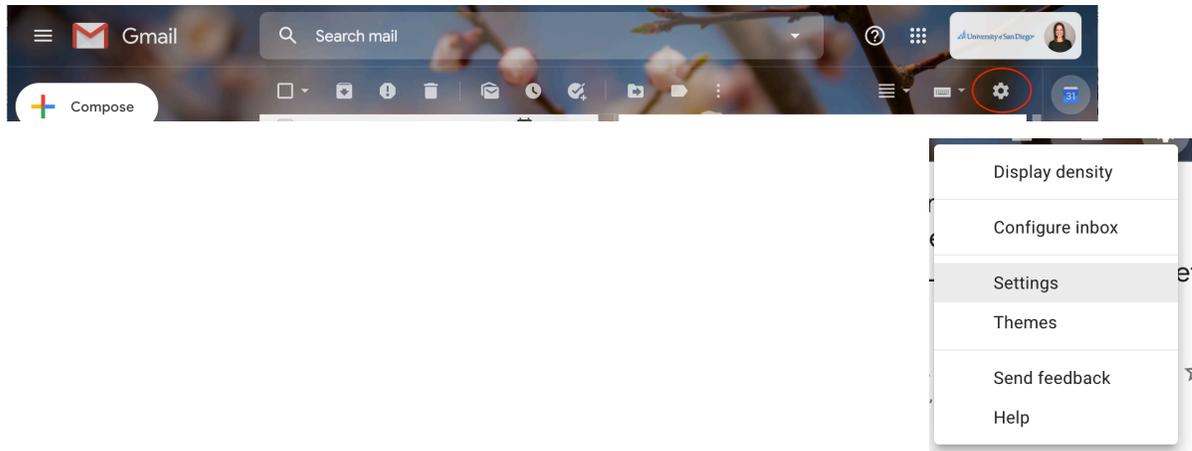
Filter

D Devon Moraes
calendly.com/dmoraes [+ New Event Type](#) ⚙️

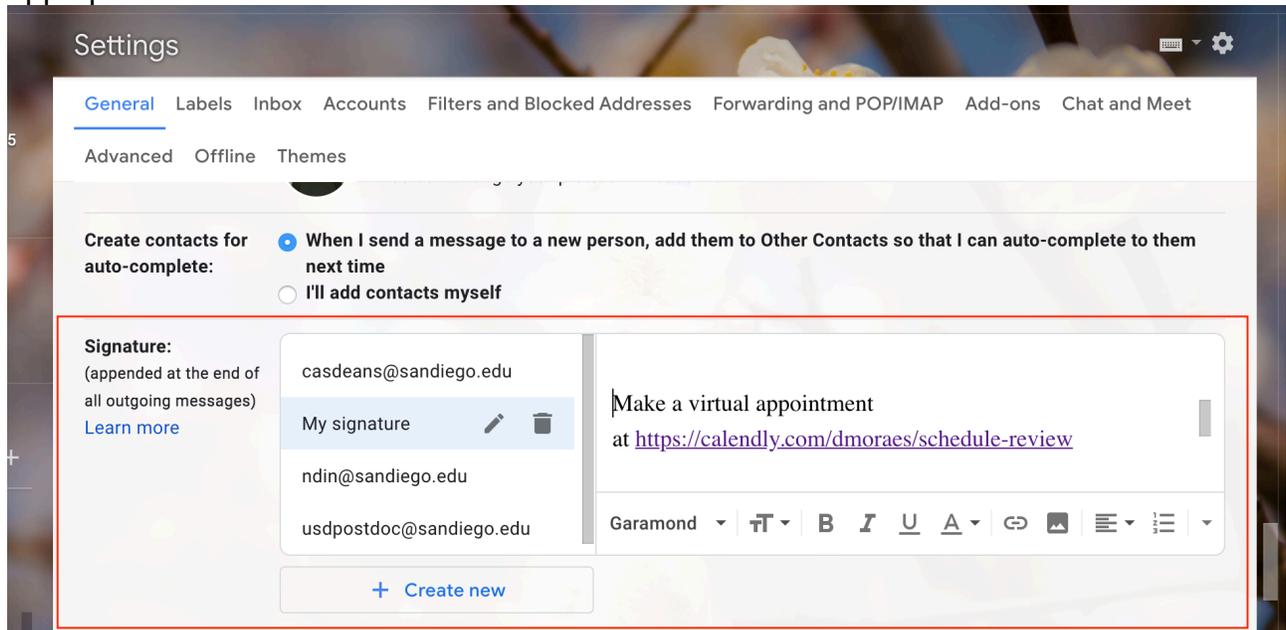
<input type="checkbox"/> Schedule Review 20 mins, One-on-One /schedule-review Copy Link ▾ ⚙️ ▾	<input type="checkbox"/> Summer Advising 20 mins, One-on-One /summer-advising Turn On	<input type="checkbox"/> First-Year Advising 20 mins, One-on-One /first-year-advising Turn On
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Advertising Your Link

An easy way for students to get your scheduling link is to include it in your email signature block. To do so, copy the link. When logged into your USD email, access your **Settings** in the top right-hand corner.



Scroll down to the **Signature** section. Then add your link to your signature with the appropriate text.



Then scroll down to the bottom of the page and **Save Changes**.

Each time you reply to or compose a new email, this will appear at the bottom of your message.