



you can book me



Module 2 Resource Guide

General overview of Account and Page settings



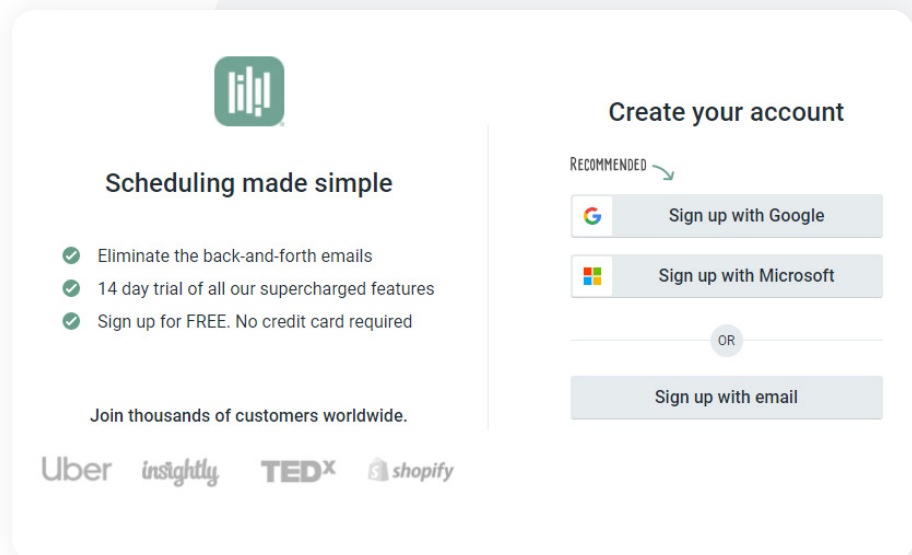


By now you should have your YouCanBook.me account all setup and a calendar integrated.

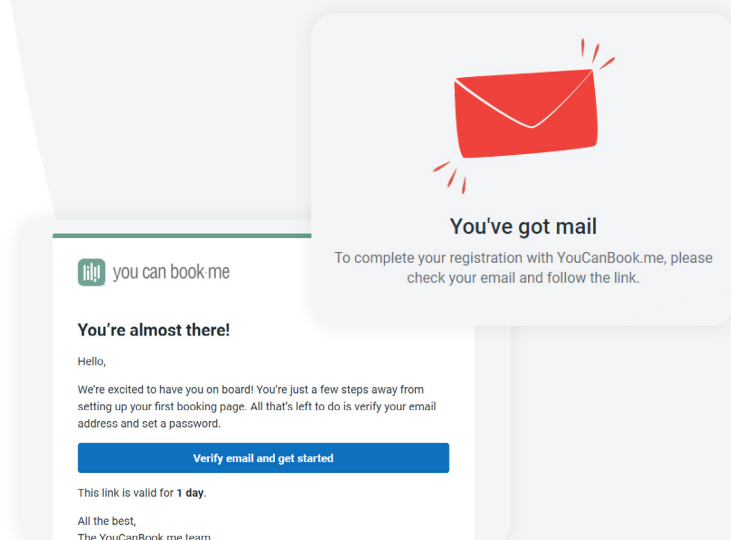
If not you can go here:

<https://app.youcanbook.me/#/register>

Either add your email address or **sign-in** with your Google or Microsoft account:



If you choose **sign up with email** you will get a notification from notifications@youcanbook.me to complete your setup:





Then you can setup a **password** and complete your account information.



The 'Welcome' screen is a white card with a green header bar. It contains the following fields and options:

- First Name** (Required): Text input field.
- Last Name**: Text input field.
- Company Name**: Text input field.
- Which best describes you?** (Required): Dropdown menu with 'Please select' as the placeholder.
- Choose password** (Show): Text input field with a 'Show' link.
- At least 8 characters. Do not use common words.
- ☐ I agree to YouCanBook.me [Terms](#) & [Privacy policy](#). (Required)
- ☐ I'd like to receive emails that will help me with productivity and making the most of YouCanBook.me
- Continue** button.

The 'Connect a calendar' screen is a white card with a green header bar. It contains the following elements:

- Connect a calendar** (Section Header)
- To show your availability and start taking bookings
- [See how it works](#)
- Google Calendar** (with icon) and **Connect** button.
- Microsoft Calendar** (with icon) and **Connect** button.
- [Show more calendar options](#) (with dropdown arrow)

After this you will be presented with the screen to **integrate your calendar**.

Click **connect** on either service you use and follow the prompts. The connection to your calendar will allow YCBM to see if you are available for bookings and will allow the system to create events directly on your calendar automatically.

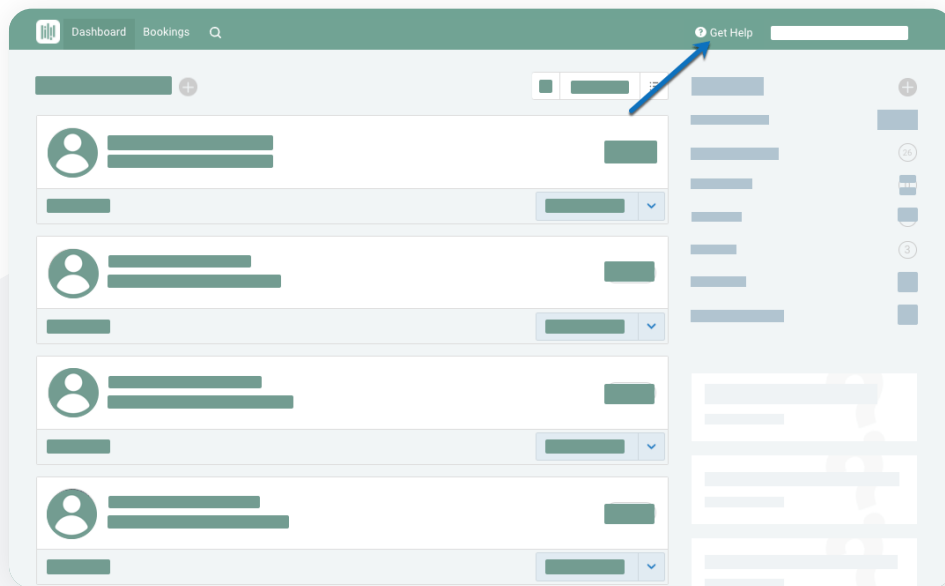
If you signed up with Google or Microsoft your account is already integrated and setup, super easy!



Once you register you will be brought to the **Dashboard**

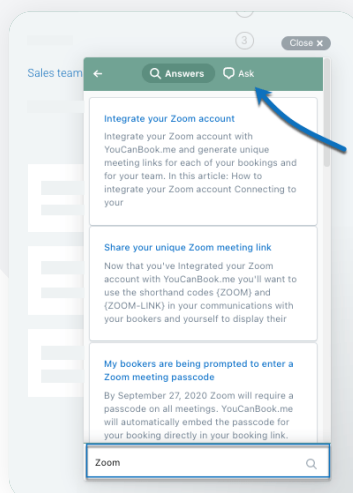
<https://app.youcanbook.me/#/dashboard> this is home to all of your booking pages.

A **booking page** is a dedicated URL (link) that has specific settings, availability and calendars connected. You can have up to 200 unique booking pages in your account. These can be for different appointment types, projects, clients/customers, or other groups. Whatever you want.



Note: While logged in you can get help by clicking the **Get Help** icon in the app. From there you have access to a robust knowledge base to help with practically everything.

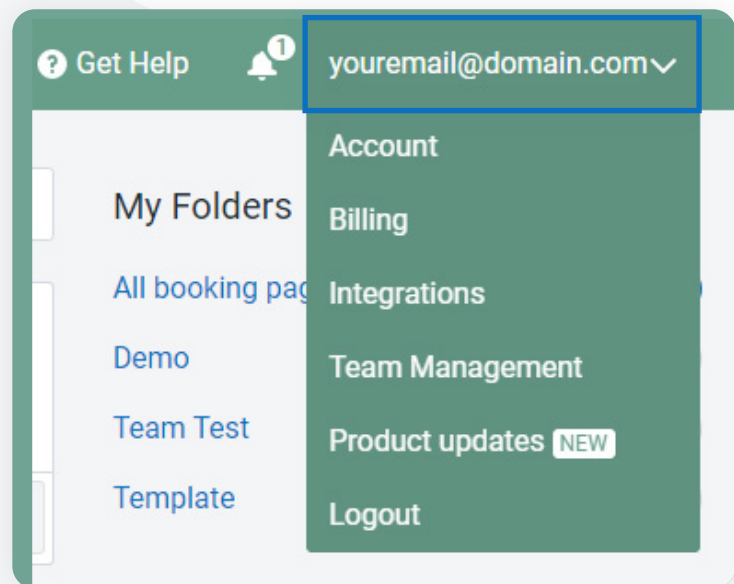
<https://support.youcanbook.me>



For paid accounts or while you're on a free trial, you also can send a questions into our **support team**.



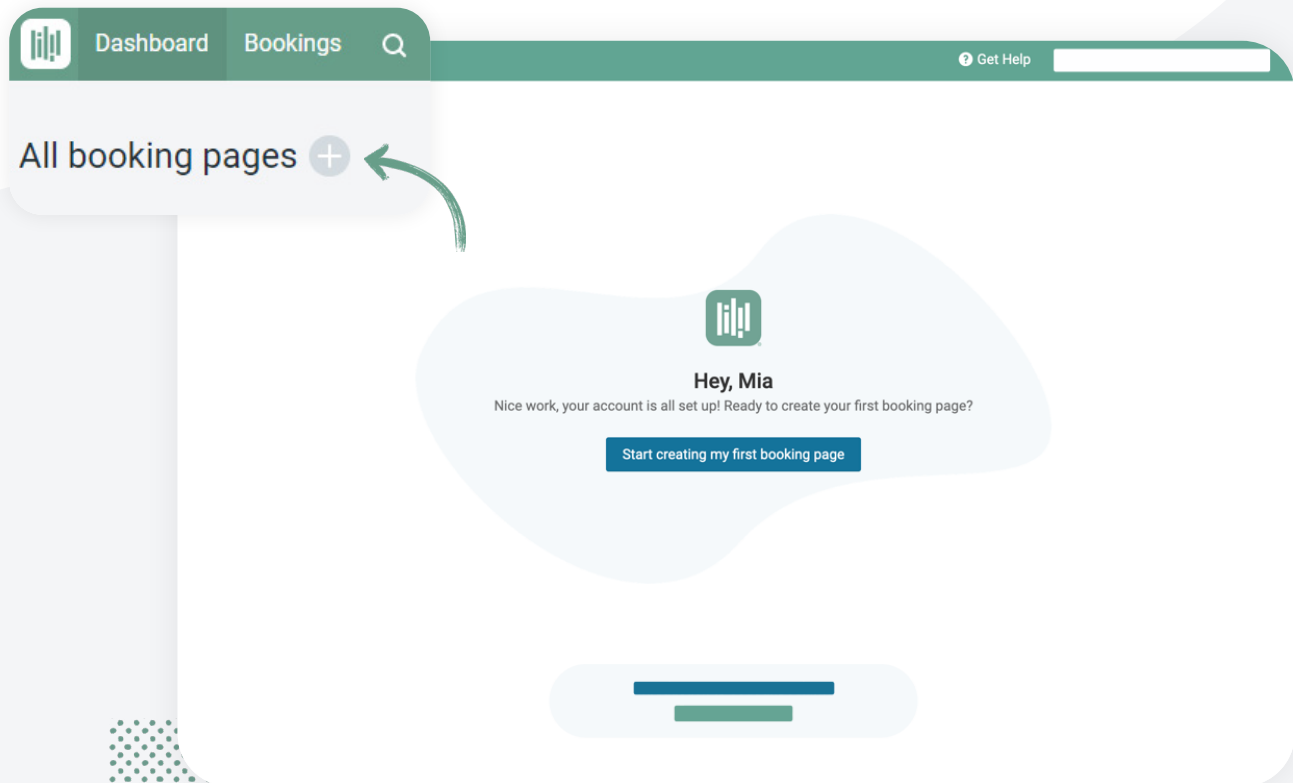
While on the **dashboard** you will see your email in the top right, this is where you can find your **account settings**:



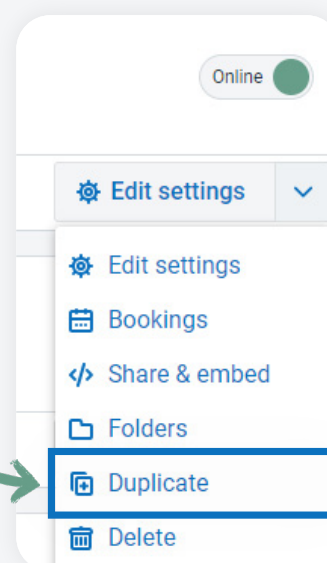
- Under **Account** you will find the way to change your account email address, password, buy SMS credits, adjust your data retention (how long booking data is stored, default is 24 months), and delete your account (don't do that!).
- Under **Billing** you can adjust your subscription, add payment information, adjust your billing address and see all of your past invoices.
- Under **Integrations** you can connect to other calendar accounts, Stripe, Zapier, Gmail, and Zoom. More details in another module along with the accompanying [resource guide](#).
- Under **Team Management** you can invite other folks to join your organization or group. This is designed for people that will be linking to more than their own calendars. A team setup course is available [here](#).
- Under **Product updates** we will be updating on changes to the app.
- Finally you can **logout**.



Back to the **dashboard** you can create a new page by clicking the first page button or the + sign:



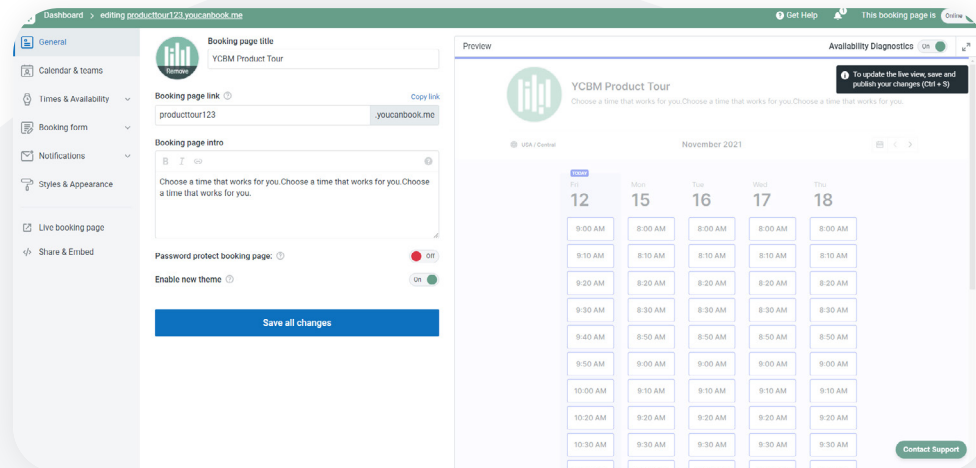
You also can **duplicate** an existing page if needed from the **dashboard** drop down:



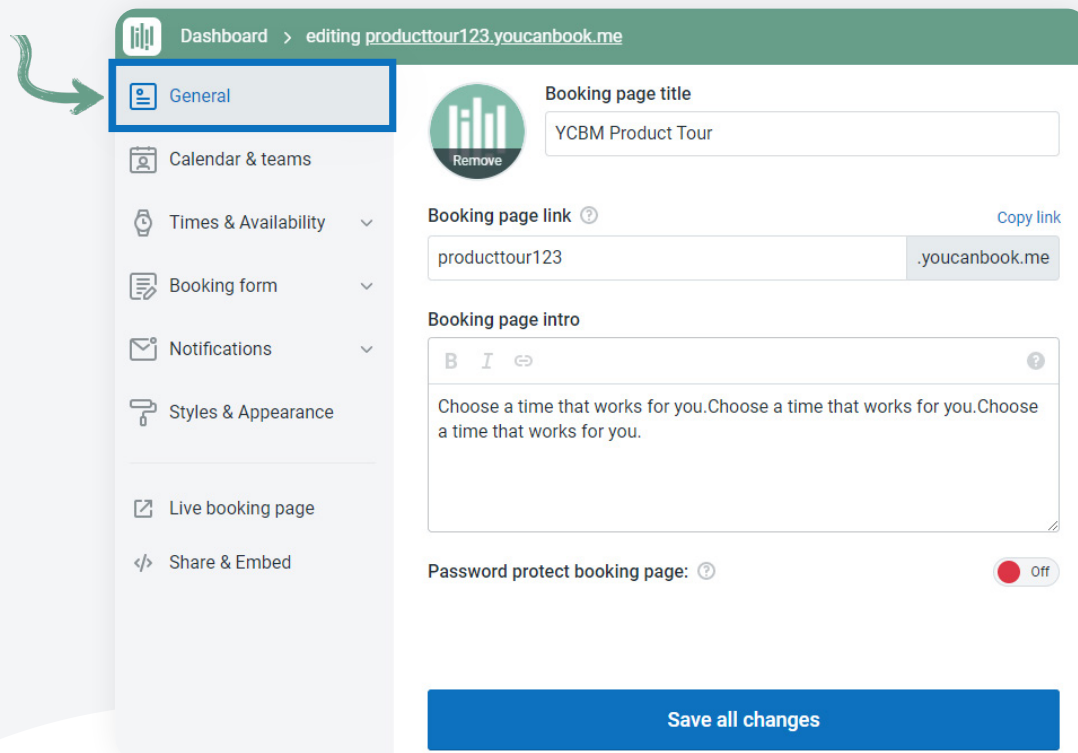


Let's take a closer look at the **booking page settings**.

When you are in the **page editor** you will see all **options** on the left side and a **preview** on the right.



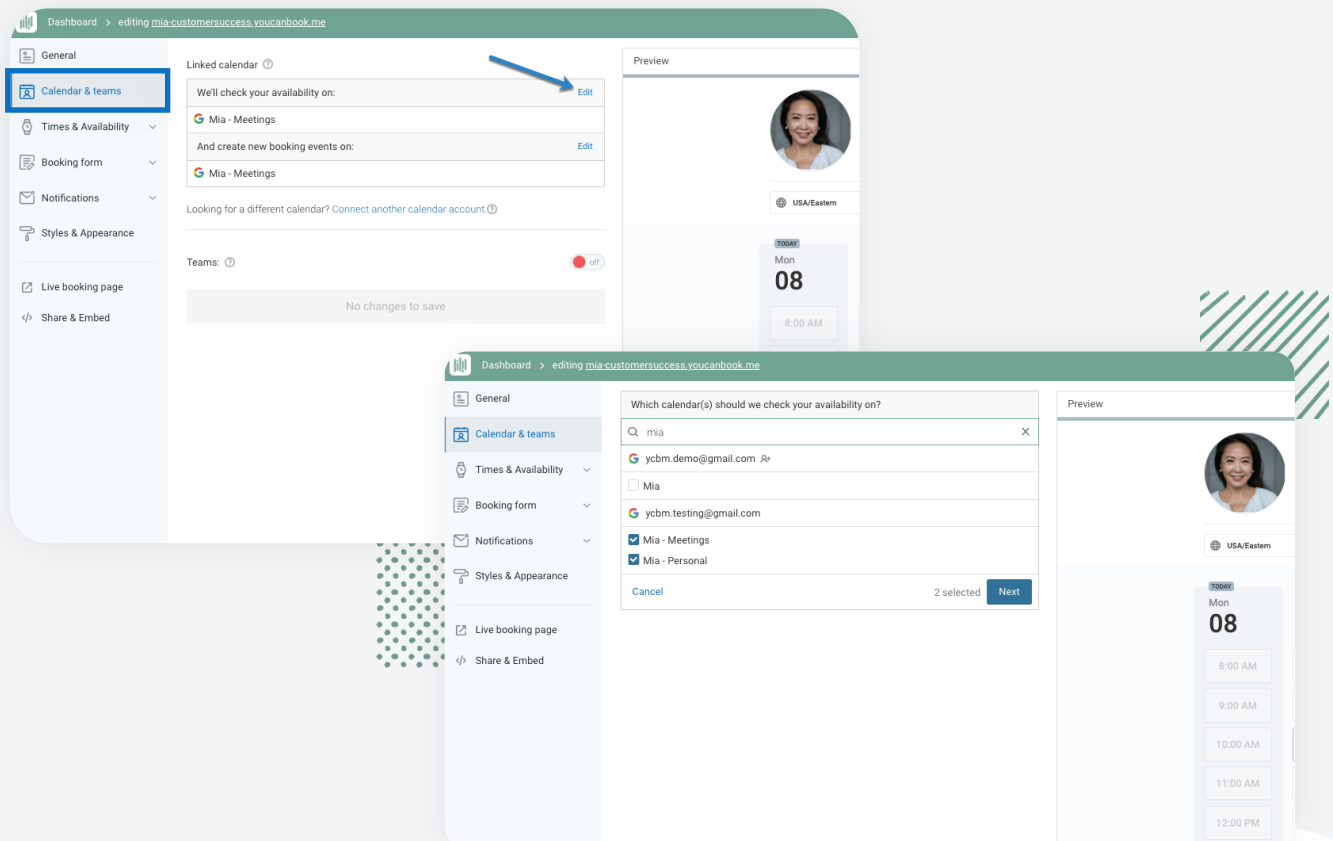
General Tab allows you to adjust the page logo, page name, page link add instructions, or create a password:





Under **Calendar & teams** you can connect your calendar, link to multiple calendars or setup a team page.

To connect a calendar click **edit**:



Then select the **calendars** that the system will check for availability. You can select multiple calendars to show when they all share free time, or mutual availability. Keep in mind that each calendar connection will increase your subscription.

More information on **Mutual Availability** [here](#).

When you turn the **teams feature** on you can connect multiple calendars to the same booking page and give the booker the option to choose who they want to meet with or have the system automatically detect. If you are only taking bookings for yourself you may not need to worry about teams.

We have a [team training course](#) to help out and some resources [here](#).



Under **Times & Availability** is where you will control the parameters on when you are available and how long someone can book you for.

This is explained further in another module and also in a different [resource guide](#).

Dashboard > editing producttour123.youcanbook.me

General

Calendar & teams

Times & Availability

- Availability
- Duration & Display
- Appointment Types
- Language & Timezones

Booking form

Notifications

Styles & Appearance

What type of availability do you have?

☒ Repeating availability OR ☐ Custom availability

Set your working hours [Edit](#)

8:00 AM - 5:00 PM	Mon – Fri
Unavailable	Sun, Sat

[+ Add break](#) ?

[+ Add fixed start date](#) ?

[+ Add fixed end date](#) ?

[Save all changes](#)

You can set your **working hours**, the time the system will check your calendar for free time. You can click **edit** and adjust the start and end time each day. Only the times that are not occupied by a busy event on your connected calendar will come through as available to book.

Underneath you can also add a break time or a busy time each day that will not be bookable. You also can add busy events directly on your connected calendar to block off time:

<https://support.youcanbook.me/article/92-how-to-block-time-in-your-schedule>

The other setting **Custom Availability** is a bit more complex, but as an overview YCBM is checking your calendar for events you setup that have a specific title. The system will only bring in those time you specify directly. Again this will be explained in depth in a different module. An overview here: <https://support.youcanbook.me/article/80-custom-availability>



Within **Times & Availability** you will see other options to setup your **Duration & Display**, **Appointment Types**, and adjust the **Language & Timezone**.

Duration & Display will allow you to setup a duration for your appointments and how the availability is displayed on your booking page.

The screenshot shows the 'Duration & Display' settings page. The left sidebar contains a menu with the following items: General, Calendar & teams, Times & Availability (expanded), Availability, Duration & Display (highlighted), Appointment Types, Language & Timezones, Booking form, Notifications, Styles & Appearance, Live booking page, and Share & Embed. The main content area is titled 'Grid display' and includes the following settings: 'Show availability in increments of' set to '10 mins'; 'Booking duration' with 'Fixed' selected at '20 mins' and 'Booker can choose duration' as an option; 'Padding' set to '10 mins' before and after a booking; a link to '+ Allow multiple bookings per time slot'; 'Min booking notice' set to '2' hours; 'Max advance booking' set to '365' days; and 'Week starts' set to 'Today'. A blue 'Save all changes' button is at the bottom.

An important note here is that your **Grid** display increment will control your booking duration options. Meaning if it is set to 1 hour you can only allow a booking in 1 hour increments, and padding in 1 hour increments.

You can offer the booker a **fixed duration** or a **flexible duration**:

This close-up shows the 'Booking duration' section. The 'Booker can choose duration' option is selected. Below it are three dropdown menus: 'Minimum' (20 mins), 'Maximum' (20 mins), and 'Default' (20 mins).



You can set the **minimum** they can book, the **maximum** they can book and the **default**. Again this is controlled by the **Grid** increment display you have set. When you use this option the booker will see a form field on the form to choose the duration:

The screenshot shows a booking form interface. At the top, the label "Duration" is positioned above a dropdown menu that currently displays "30 minutes". Below the dropdown is a prominent blue button with the text "Confirm Booking" in white. At the bottom of the form, a small text notice states: "This form is protected by reCAPTCHA and the Google [Privacy Policy](#) and [Terms of Service](#) apply."

Padding will allow you to setup a buffer between bookings. This is great if you need time to do a write up or follow up after a booking. This duration of padding is controlled by the increment display you have setup. We will add the padding before and after any busy event on your calendar to allow for time for a meeting to be scheduled.

More information on **padding**:

<https://support.youcanbook.me/article/81-how-to-use-padding-add-buffer-time-between-appointments>

With **Units Per Slot** you can allow up to 50 people to book a time to meet with you. This is great for group sessions like trainings, small webinars, or for resource allocation (you have 4 boats that folks could check out as an example). When this setting is turned on YCBM will allow up to the number you select in busy events on the calendar. Meaning if this is set to 10 we will allow 10 busy events. If you have any busy events on the calendar it will act as a unit. If you need to block off time completely you can add **YCBM-OVERRIDE-UNITS** to the description.

An important note that our Zoom integration does not support units. If you want to setup group Zoom sessions you will have to use a static Zoom link.

More information with the **units** feature here:

<https://support.youcanbook.me/article/263-setting-up-units-per-slot>



The last setting in **Duration & Display** is the minimum and maximum booking notice. This is the amount of time that folks are allowed to book. Meaning if your minimum booking notice is set to 2 days your bookers will only see your availability 2 days out and beyond. The maximum booking notice is how far in the future someone can book. If this is set to 2 weeks folks can only book up to two weeks from this moment in time.

You can also set the day of the week that your schedule will start. By default this is set to Today. So when folks visit they will see availability from today onward. More information with minimum and maximum notice:

<https://support.youcanbook.me/article/78-setting-a-minimum-and-maximum-advance-notice-forbookings>

Another option for duration is to setup **Appointment Types**. This will allow you to setup different duration options for meetings of different topics. When this is turned on you can setup and group Appointment Types. This is a great option if you want folks to choose what they want to meet with you about, or if you have different meetings that require different time commitments.

The screenshot shows the 'Appointment types' settings page. On the left is a sidebar with navigation links: General, Calendar & teams, Times & Availability (expanded), Appointment Types (selected), Language & Timezones, Booking form, Notifications, Styles & Appearance, Live booking page, and Share & Embed. The main content area is titled 'Appointment types' and has a toggle switch set to 'On'. Below the toggle are two appointment types: 'My service' and 'Another one', both with a duration of 15 minutes. There is a '+ Create new appointment type' button. Below that is a text area for an 'Intro for appointment type selection' with the placeholder text 'Choose an appointment type.' and two checkboxes: 'Select more than one in the same booking' and 'Divide them into groups'. A 'Save all changes' button is at the bottom.

More information with **Appointment Types** here:

<https://support.youcanbook.me/article/223-appointment-types>



Language & Timezone will allow you to adjust the language of your booking page and the timezone that the page is referencing.

The default timezone will be detected from your **calendar**:

The screenshot shows the 'Language & Timezones' settings page. The left sidebar contains a menu with 'General', 'Calendar & teams', 'Times & Availability' (selected), 'Availability', 'Duration & Display', 'Appointment Types', 'Language & Timezones' (highlighted), 'Booking form', 'Notifications', and 'Styles & Appearance'. The main content area is titled 'Booking page time zone' and features a dropdown menu set to 'USA/Central'. Below this is a checkbox 'Automatically detect time zone from my calendar' which is checked. A note states: 'Disabling this (not recommended) allows you to select a different time zone to the one we have detected from the calendar where the event will be created.' Under 'Timezone display', there is a checked checkbox 'Display booking page timezone' and an unchecked checkbox 'Automatically detect booker timezone'. The 'Language and date/time format' section has a dropdown set to 'Automatically selected' and a checked checkbox 'Automatically detect visitor language'. A blue 'Save all changes' button is at the bottom.

If the **timezone** does not match (you are showing up as UTC) you can uncheck the box and use the dropdown to select the accurate timezone.

Below you can choose if we are automatically detecting the booker's timezone. When this is checked the booking page will **adjust to the timezone** of where the booker is physically located. There is a drop down on the booking page where they can change the timezone if needed:

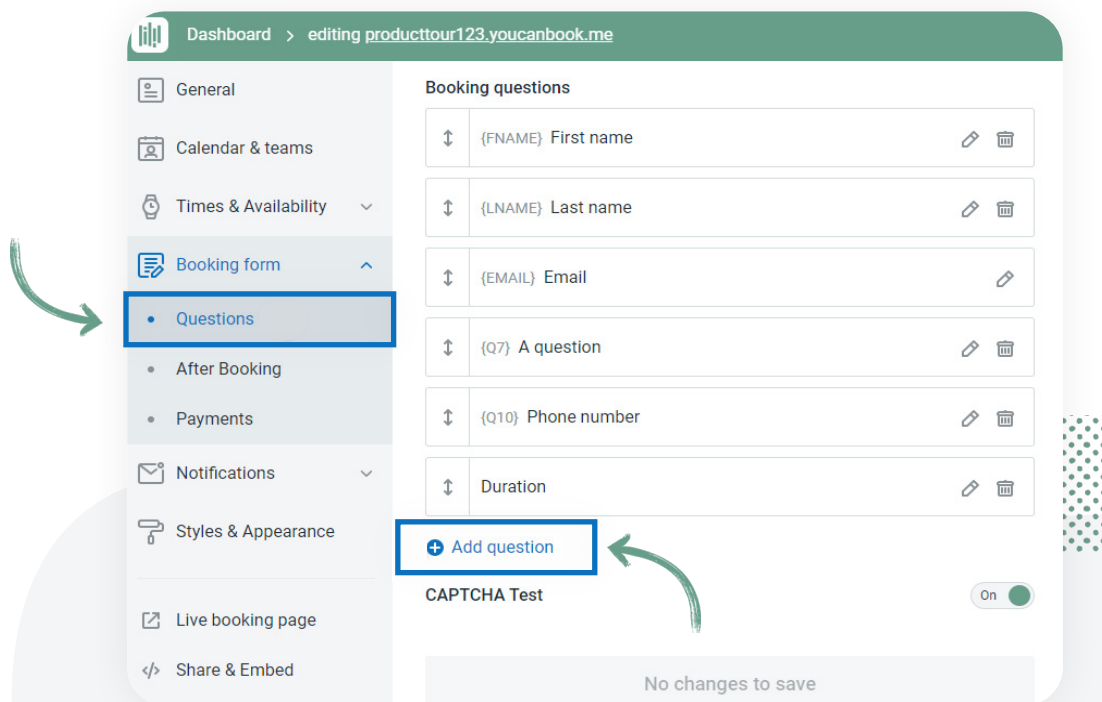
The screenshot shows the 'YCBM Product Tour' booking page. At the top, there is a logo and the title 'YCBM Product Tour' with the subtitle 'Choose a time that works for you. Choose a time that'. Below this is a dropdown menu for the timezone, currently set to 'USA/Central'. To the right of the dropdown is the text 'November 2021'. The main content area displays a calendar grid for the days 'Fri 12', 'Mon 15', and 'Tue 16'. Each day has two time slots available: '3:15 PM' and '3:30 PM' for Friday, and '8:15 AM' and '8:30 AM' for Monday and Tuesday. A 'TODAY' label is positioned above the Friday date.

Important note: if you are scheduling in person events be sure to not check “Automatically detect booker timezone” this way all of the bookings will be in the same timezone so if folks are traveling the booking will be at the destination timezone.



Finally with **Language** you can adjust the language of the booking page to be anything you would like. This will change system generated information anything you are typing will need to be manually translated, this includes email notifications, booking form questions and instructions. More information about language [here](#).

Within the booking form you can ask any questions you would like to for your booker. Within this section you can add more information by clicking the **Add a question** button:



You can choose from:

Type	Description
Short answer	The simplest type of question. The booker enters a single line of text.
Long answer	For longer answers, which might be spread over several lines. These are good for addresses or 'please enter more detail' type questions.
Email address	This is included by default in your booking form. This field will validate the email entered by your booker. If you don't include at least one email address question type on your form, the system will not be able to send out any confirmation or reminder emails to your booker.



Phone number	Be sure to check the mobile phone option if you want to send SMS messages. The country is automatically detected. Bookers can enter the number in any format. There is no need to add a country code.
Checkbox	Simple check box. Can be used to get agreement from the booker for terms and conditions, etc.
Multiple choice	Enter the list of choices in the text box - one option on a line. You can set the choice to be either dropdown lists, radio buttons or a set of checkboxes. Select 'checkboxes' to allow the user to choose more than one of your options.
Passthrough question	Data is added to the booking form by passing it through in the URL. The 'answer' will appear on the booking form, but will not be editable by the booker. If there is nothing in the URL, then the field will appear blank.
Hidden question	Similar to a passthrough question, data is added by passing it through in the URL. The question will not appear on the booking form, and you can only display the results in your confirmation emails by using the corresponding shorthand code.
Block of text	For the bookers' information only. Does not require input. Use this to add extra information to your booking form. Simply add text into the 'before' box, or split it between the before and after boxes to format it slightly differently.
Start time	This will show the time and date that the person chose on the previous page. You can change the label to anything that makes sense for your users, e.g. "Your appointment will start at:"
End time	This automatically calculates the end time of the booking.
Duration	If you have different length appointments available, this will present a dropdown box showing the range of durations that are available for the selected start time.
Dividing line	To break up a long form, you might want to add a dividing line or two between sections.
Price	This option will appear if you have set a price on your Appointments, or are taking payments on your booking page. This item will simply display the price to the user.



Units 'How many do you need?'	Automatically added when the 'units per slot' feature is enabled on the Times & Availability section. See the help page for that item for more information.
Appointment Type Name	When using our appointment types feature, this will display the type of appointment your booker has selected. This is optional to include on the booking form and can be removed.
Appointment Type Description	When using our appointment types feature, this will display the description field for the appointment your booker has selected. This is optional to include on the booking form and can be removed.
Team name	When using our teams feature, this will display the team member who will receive the booking. This is optional to include on the booking form and can be removed.
Team description	When using our teams feature, this will display the description field for the team member that has been booked. This is optional to include on the booking form and can be removed.

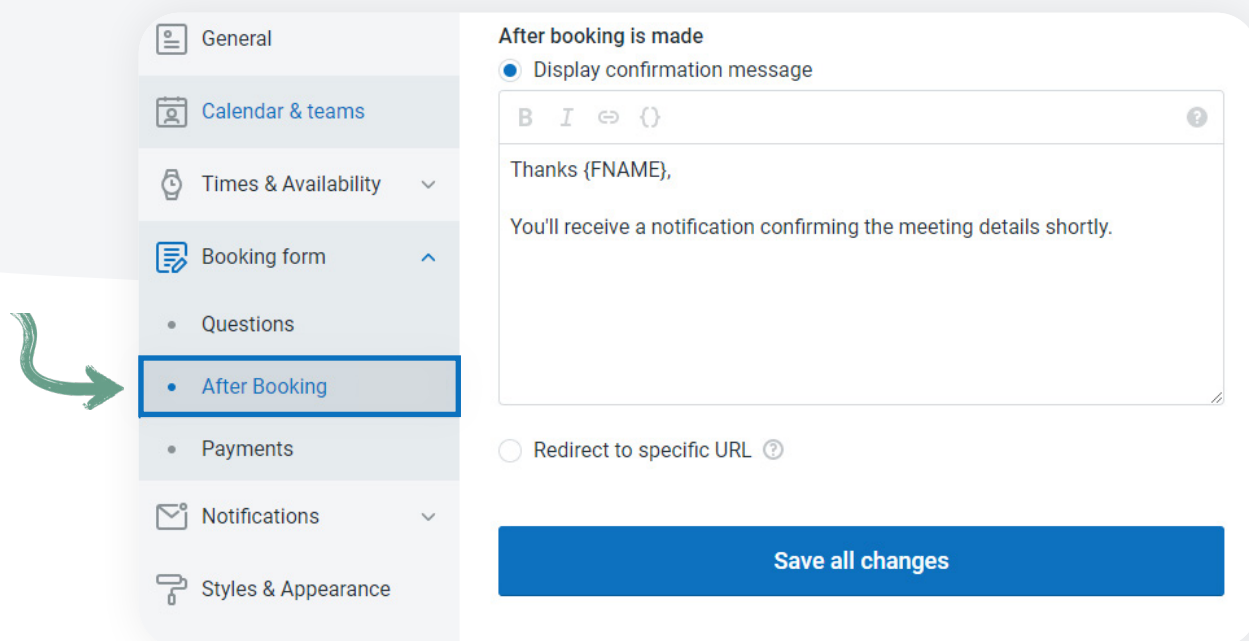
When you are setting up a **booking form question** you can choose your type, the label (how folks will see it) a **Shorthand code** (a super powerful piece we will cover later), and any message you want to include after the question. You can also mark things as required.

You can also drag questions to rearrange them.

More information about the **booking form** here:

<https://support.youcanbook.me/article/574-create-your-booking-form>

After the booker interacts with your booking form you can show them an after **booking message** or redirect them to a new URL (like a thank you page).



As you can see you can include the powerful **{SHORTHAND-CODES}** in any message that the booker will see to personalize things. More information here:

<https://support.youcanbook.me/article/698-video-customize-communications>

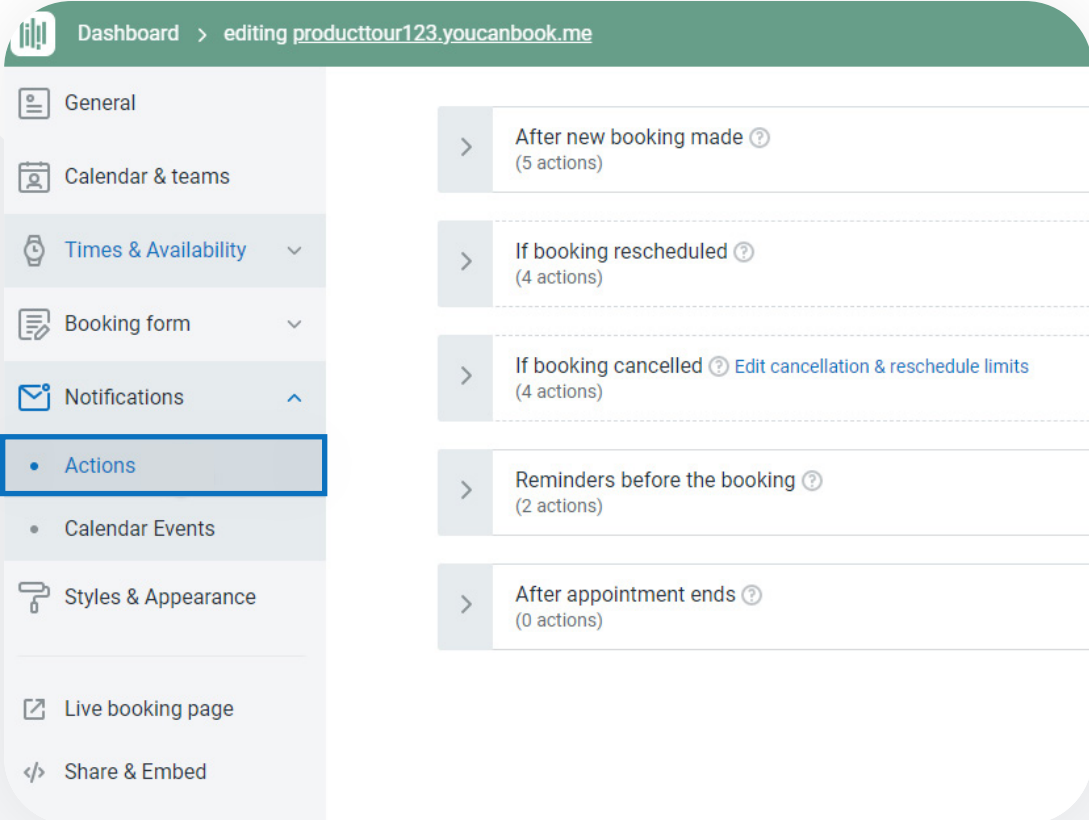

Under **Payments** you can integrate Stripe and accept payments for your bookings. More information here:

<https://support.youcanbook.me/article/72-how-to-take-payments-for-your-bookings>

Within the **Notifications** section you will be able to create and adjust any email or SMS message that is sent out to the booker. This will be explained in a [later module](#) that will go more in depth into this section.



At an overview you will see five different triggers for when notifications can be sent. After a booking is made, if it is rescheduled, if it is cancelled, reminders before and follow ups after. You can use **{SHORTHAND-CODES}** to customize things for the booker and can have notifications be sent to you or the booker.



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- General
- Calendar & teams
- Times & Availability
- Booking form
- Notifications
 - Actions**
 - Calendar Events
- Styles & Appearance
- Live booking page
- Share & Embed

- > After new booking made ? (5 actions)
- > If booking rescheduled ? (4 actions)
- > If booking cancelled ? [Edit cancellation & reschedule limits](#) (4 actions)
- > Reminders before the booking ? (2 actions)
- > After appointment ends ? (0 actions)

More information on **Notifications** here:

<https://support.youcanbook.me/article/228-confirmations-and-reminders>



Within this section you also can setup the **calendar event** that customers will see. By default the system will invite your booker to share the calendar event, they are a participant.

Dashboard > editing producttour123.youcanbook.me

- General
- Calendar & teams
- Times & Availability
- Booking form
- Notifications
 - Actions
 - Calendar Events**
- Styles & Appearance
- Live booking page
- Share & Embed

Your calendar event | Booker calendar event

Your calendar event title
{FNAME} and {BOOKING-PAGE-TITLE}

Your calendar event description
{FORMFIELDS}

Event location
Google Meet

We'll create a new meeting link and add it to the location. Use {GOOGLEMEET} to output the meeting link in your confirmation and reminder emails.

Invite participants to your calendar event ☒ On

All booking form emails x Type another email

Save all changes

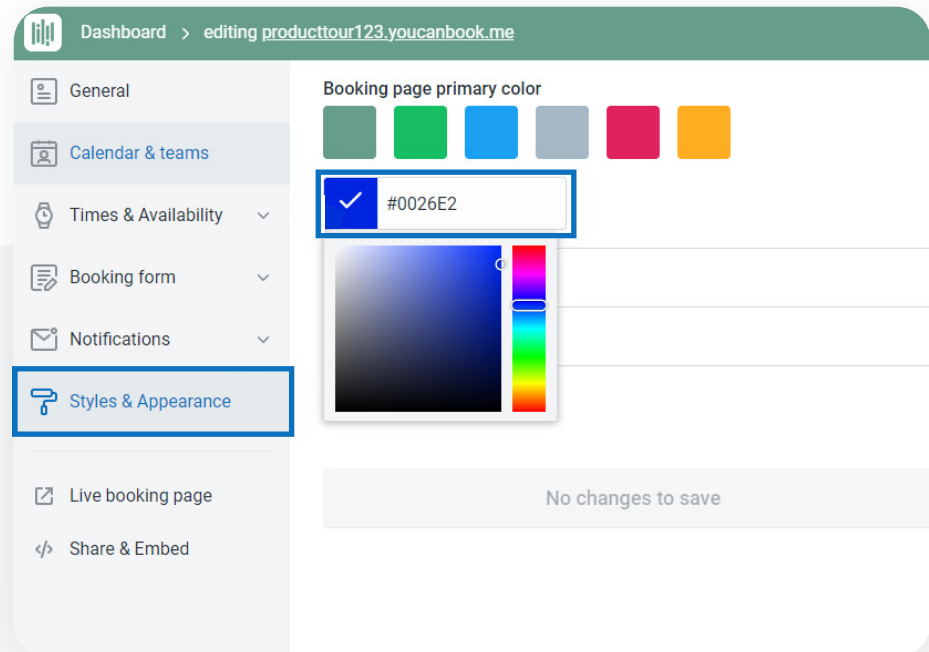
You also can specify a **location** by using Zoom or Google Meet or a physical location or any information you want to include there. You can fully customize this information.

More information on **calendar invites**:

<https://support.youcanbook.me/article/536-customizing-the-bookers-calendar-event>



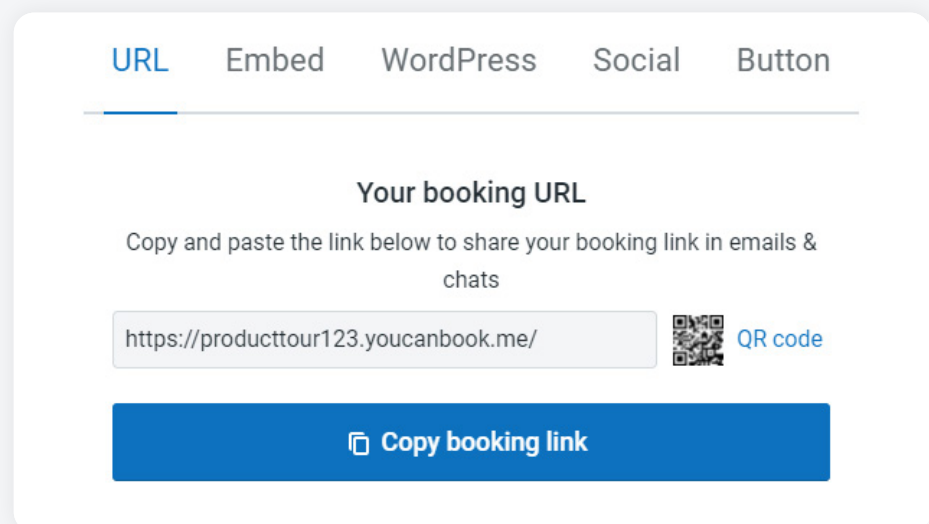
Under **Styles & Appearance** you can adjust the brand color and add a footer. Click into the color to bring up the color picker:



Add any HEX color you would like. The complementary colors will adjust automatically. You also can add a footer to add more information.

Within the **Share & Embed** you will see a QR code and link and also a way to embed the booking page onto your website.

With the **Embed** it is as simple as copy the code and paste into your site. More information [here](#).



Later modules and resources will go more in depth into Availability, Notifications, managing bookings and increasing your bookings.



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Get more done.

Business Success Stories

Find out more & listen



