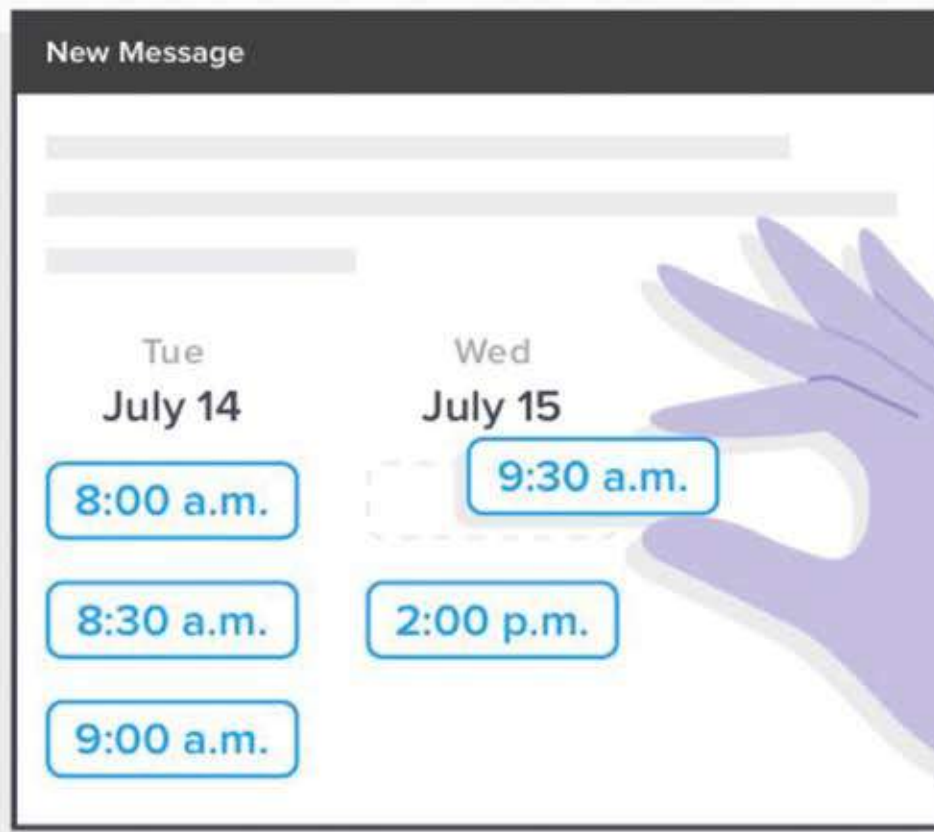


GET 3X MORE CONSULTATION CALLS

A Step By Step Guide To Set Up Calendly



imagineGROWTH
Institute



Step 1: Go to [Calendly.com](https://calendly.com)

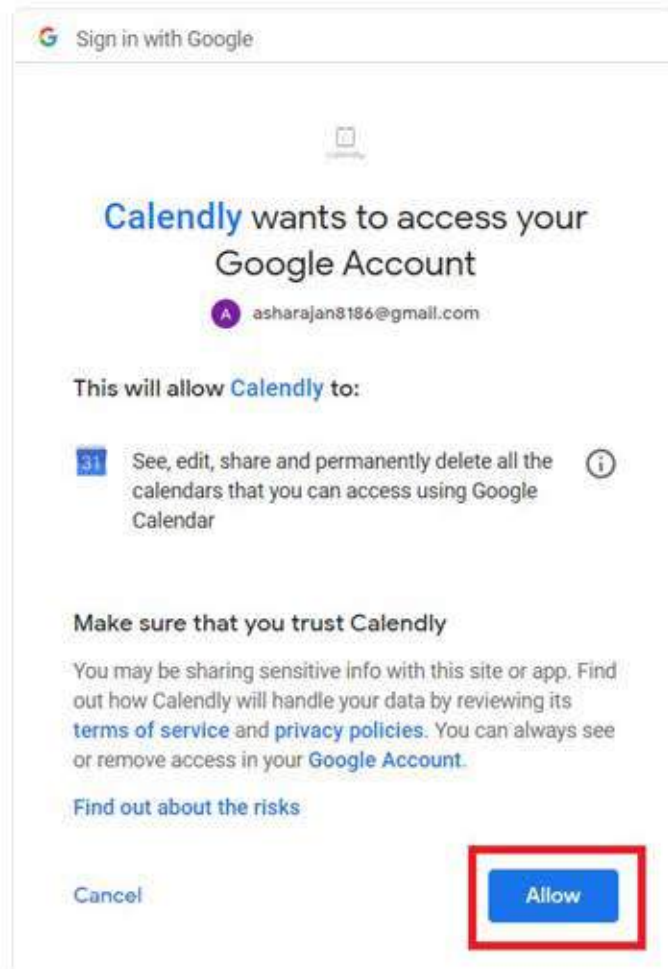
The screenshot shows the Calendly homepage. At the top left is the Calendly logo. To its right are navigation links: Features, Pricing, Integrations, Solutions, For Teams, Sign Up (highlighted in blue), and Log In. The main content area features the headline "Calendly helps you schedule meetings without the back-and-forth emails". Below this is a sign-up form with a text input field containing "Enter your email" and a blue "Sign Up" button. Underneath the form is the text "Get started for free. No credit card required." To the right of the form is an illustration of two cartoon characters with speech bubbles containing email icons, representing the reduction of back-and-forth emails.

Step 2: Sign up using your Email

This screenshot is similar to the previous one but includes a blue banner at the top with the text: "Calendly will support free integrations with video meeting tools, Zoom and GoToMeeting, through June, to help make connecting during the COVID-19 quarantine easier." The navigation links now include "My Account" instead of "Log In". The sign-up form is highlighted with a red border, and the "Sign Up" button is also highlighted in blue. The rest of the page content, including the headline and illustration, remains the same.



NOTE: When you sign up for Calendly using your Google email address, your calendar will automatically be connected to your account.






Step 3: Create your unique URL and edit the time zone if needed.

Welcome to Calendly!

We take the work out of connecting with others so you can accomplish more.



Create your Calendly URL

Choose a URL that describes you or your business in a concise way. Make it short and easy to remember so you can share links with ease.

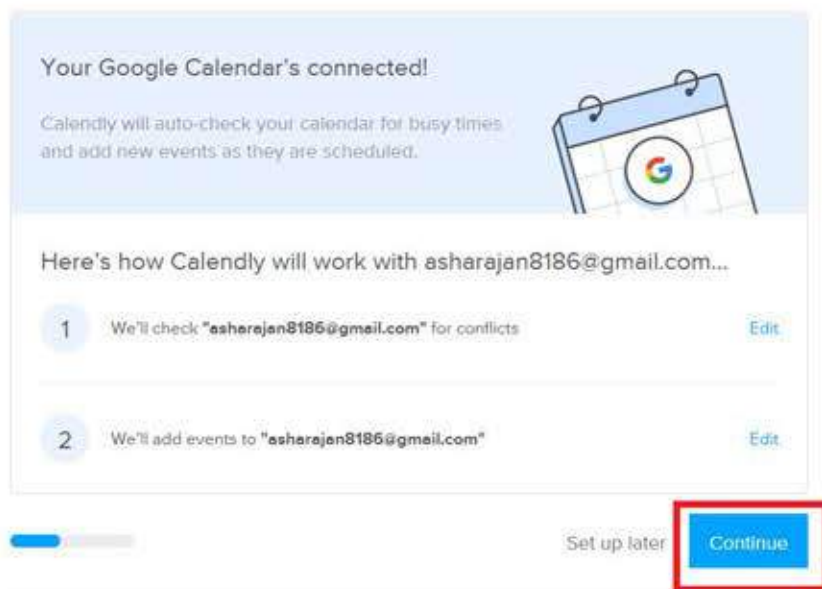
Time Zone

India Standard Time (08:51pm) ▾

[Set up later](#) [Continue](#)



Step 4: Calendly will auto check the email, and add meeting events to any calendars linked with your email account.




[Continue without calendar.](#)



Step 5: Set your availability and schedule:

Set your availability

Let Calendly know when you're typically available to accept meetings.



Available Hours

09:00am — 05:00pm

Available Days

<input type="checkbox"/> Sundays	<input checked="" type="checkbox"/> Mondays	<input checked="" type="checkbox"/> Tuesdays	<input checked="" type="checkbox"/> Wednesdays	<input checked="" type="checkbox"/> Thursdays	<input checked="" type="checkbox"/> Fridays	<input type="checkbox"/> Saturdays
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🔗 Don't worry! You'll be able to further customize your availability later on.

[Set up later](#) [Continue](#)



Step 6: Add a few more details about yourself.

The screenshot shows the Calendly 'Personalize your experience' form. At the top, there is a header with the Calendly logo and the text 'Personalize your experience'. Below this, a sub-header asks 'Tell us about your role at work. This will help us to provide a tailored support experience.' To the right of this text is an illustration of a computer monitor and a pencil. The main content area is titled 'What is your day-to-day role at work?' and contains a list of radio button options: Sales + Marketing, Interview Scheduling, Education, Customer success + Account Management, Freelance + Consultant, Leader + Entrepreneur, and Other. At the bottom of the form, there is a progress bar on the left and a 'Finish' button on the right.

This is the default screen after setting up the account.

The screenshot shows the 'My Calendly' dashboard. At the top, there is a navigation bar with 'Home', 'Integrations', 'Help', and 'Account' (with a user profile icon). Below the navigation bar, the title 'My Calendly' is followed by tabs for 'Event Types' and 'Scheduled Events'. A 'Filter' icon is visible on the left. The main content area shows the user's profile 'Asha Rajen' with the email 'calendly.com/asharajen'. To the right of the profile is a '+ New Event Type' button. Below the profile, there are three event type cards: '15 Minute Meeting' (15 mins, One-on-One), '30 Minute Meeting' (30 mins, One-on-One), and '60 Minute Meeting' (1 hr, One-on-One). Each card has a 'Copy Link' button and a dropdown arrow.



Step 7: Once you've set up your account, you can click on any of the event types to edit them and set up a custom form for your prospects:

The screenshot shows the 'Edit One-on-One Event Type' interface. At the top, there's a navigation bar with 'Home', 'Availability' (with a 'NEW' badge), 'Integrations', 'Help', and 'Account'. Below this, a 'Back' button is on the left, and 'Your event type is ON' is on the right. The main content area includes 'Invitee language' set to 'English' and a 'view live page' link. Two event configuration cards are shown: 'What event is this?' (15 Minute Meeting) and 'When can people book this event?' (15 min, 50 rolling days). Under the 'Additional Options' section, 'Invitee Questions' (Name, Email + 1 question) is highlighted with a red box, and 'Notifications and Cancellation Policy' (Calendar Invitations, No Reminders) is also visible. A 'Getting Started Guide' button is located in the bottom right corner.

Step 8: After you click on Invitee Questions, you can add more custom questions to your form by clicking on the 'Add new question' option.

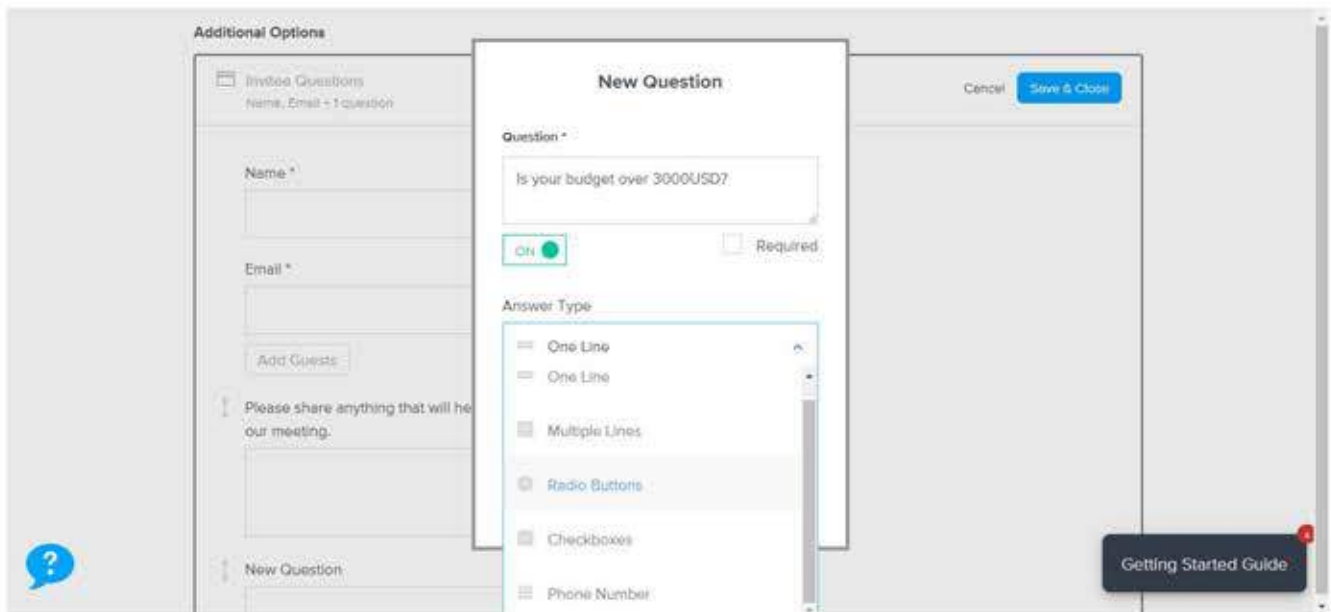


The screenshot shows the 'Additional Options' form. At the top, there is a title bar with 'Additional Options', a 'Cancel' button, and a 'Save & Close' button. Below the title bar, there is a section for 'Invite Questions' with a sub-header 'Name, Email + 1 question'. This section contains two text input fields for 'Name *' and 'Email *', an 'Add Guests' button, and a text area for 'Please share anything that will help prepare for our meeting.' with a pencil icon. At the bottom left of the form, a red box highlights the '+ Add New Question' button. On the right side of the form, there is a dark blue button labeled 'Getting Started Guide' with a red notification bubble.

Step 9: After you click on 'Add new question', a new question window will pop up which allows you to add any type of question to your form.

The screenshot shows the 'New Question' dialog box overlaid on the 'Additional Options' form. The dialog box has a title bar with 'New Question', a 'Cancel' button, and a 'Save & Close' button. Inside the dialog, there is a 'Question *' text input field, a 'ON' toggle switch, and a 'Required' checkbox. Below these is an 'Answer Type' dropdown menu currently set to 'One Line'. At the bottom of the dialog, there is a 'Delete Question' button with a trash icon, and 'Apply' and 'Cancel' buttons. The background form is dimmed.

After adding your question; you can select the appropriate answer type.

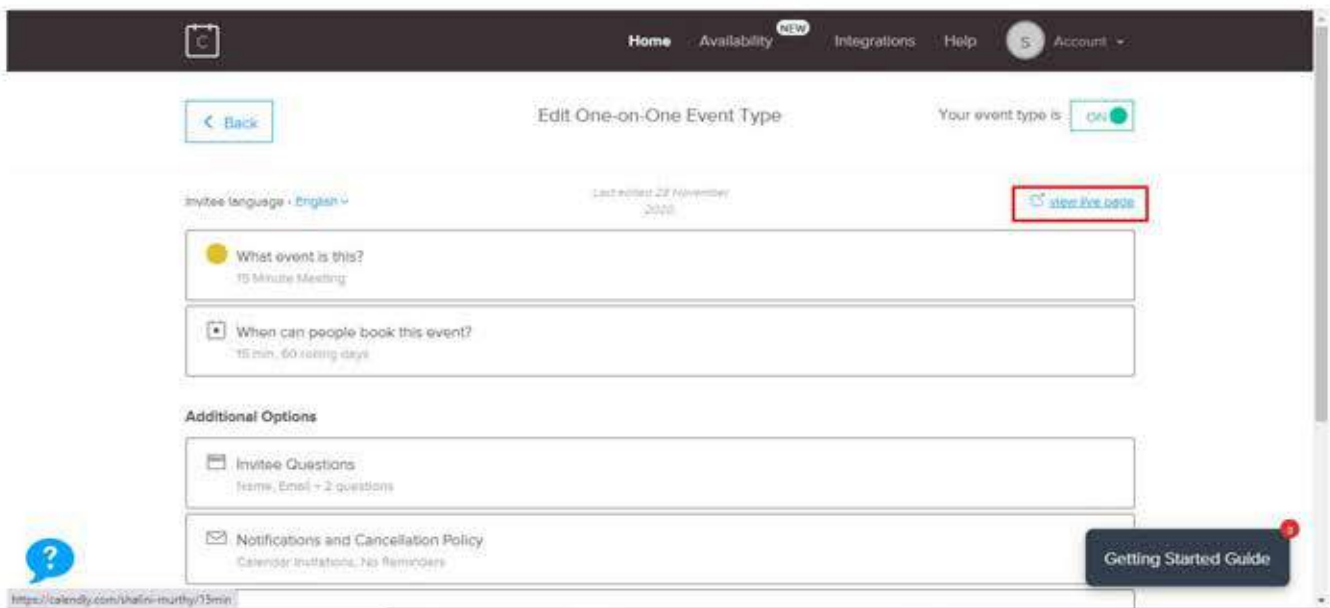


Since I've chosen the answer type as 'Radio buttons' ; I have added answers that I want my clients to choose from.

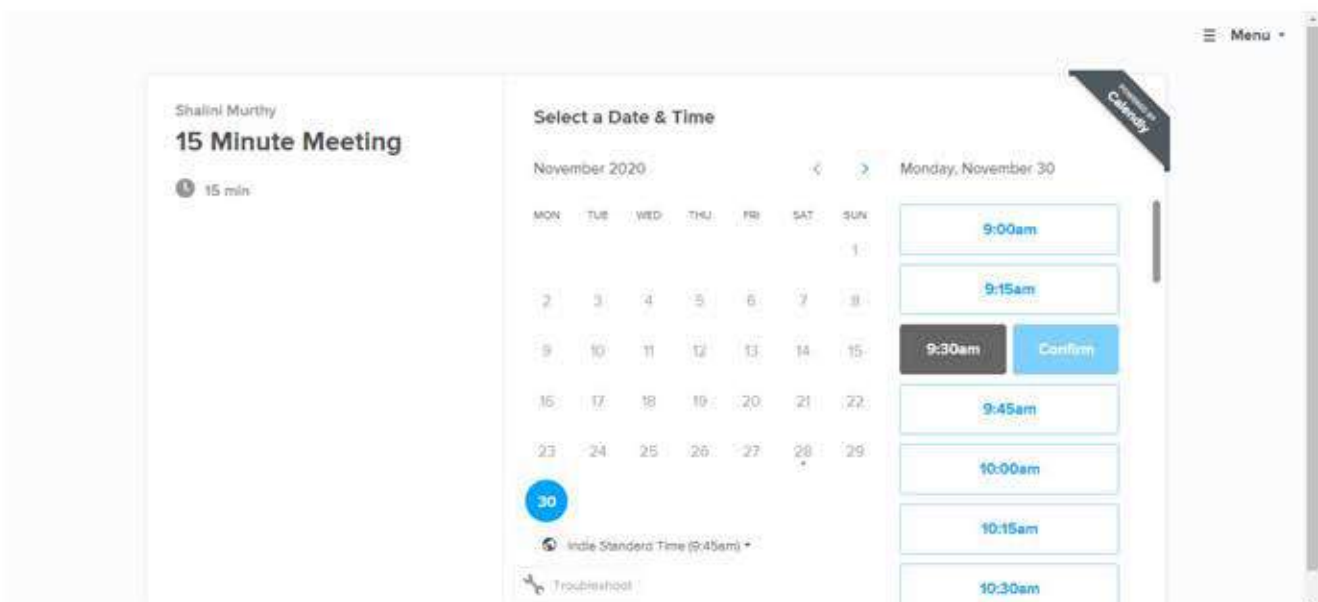


Step 10: Once you've added the custom questions to your form, click on save and close.

Step 11: You can preview the form you created using the 'view live page' link at the top right corner of the page.



Step 12: In the live preview page, you can select a time and date when you want to schedule the meeting- just to test if your scheduler is working as it's supposed to.





Step 13: When your prospects confirm the date and time; they'll be taken to the next page that displays your custom form.

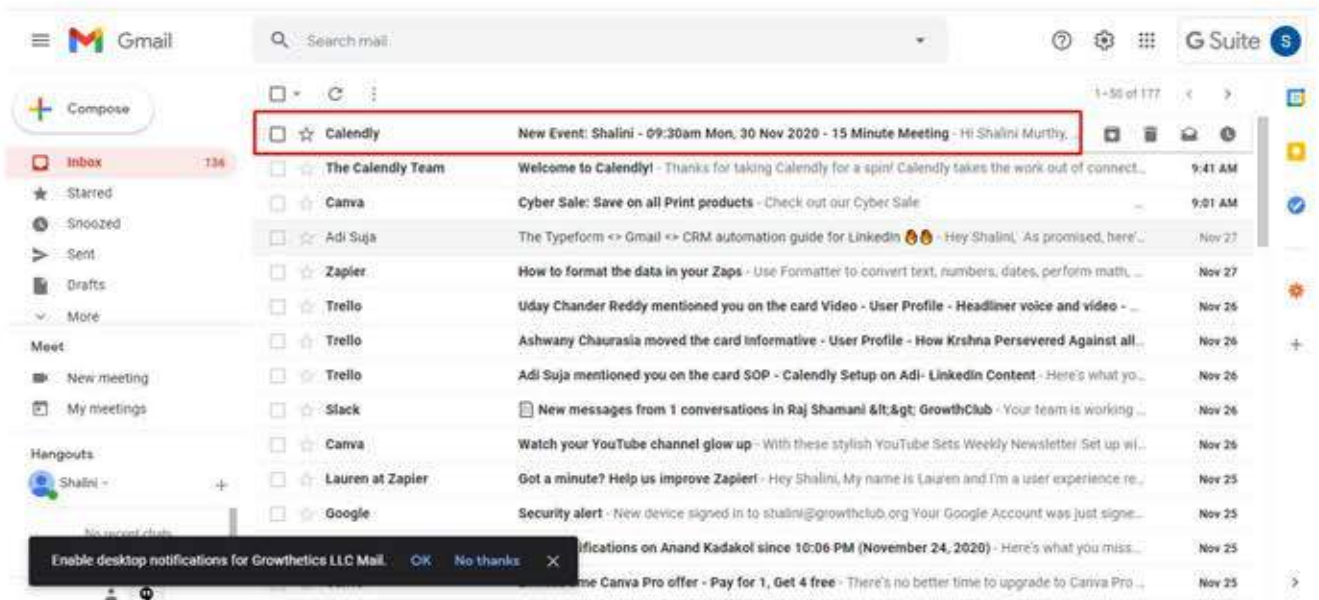
The screenshot shows a mobile interface for scheduling a meeting. On the left, a summary card displays: 'Shalini Murthy', '15 Minute Meeting', '15 min', '9:30am - 9:45am, Monday, November 30, 2020', and 'India Standard Time'. The main 'Enter Details' form on the right includes: a 'Name *' field (empty), an 'Email *' field (empty), an 'Add Guests' button, a text area for 'Please share anything that will help prepare for our meeting.' (empty), and a question 'Is your budget over 3000USD?' with radio button options for 'Yes', 'No', and 'Yet to decide'. A 'Powered by Calendly' badge is in the top right corner.

Step 14: After they answer the questions & click on the “Scheduled event”, the event gets scheduled, and it’s added to your calendar automatically.

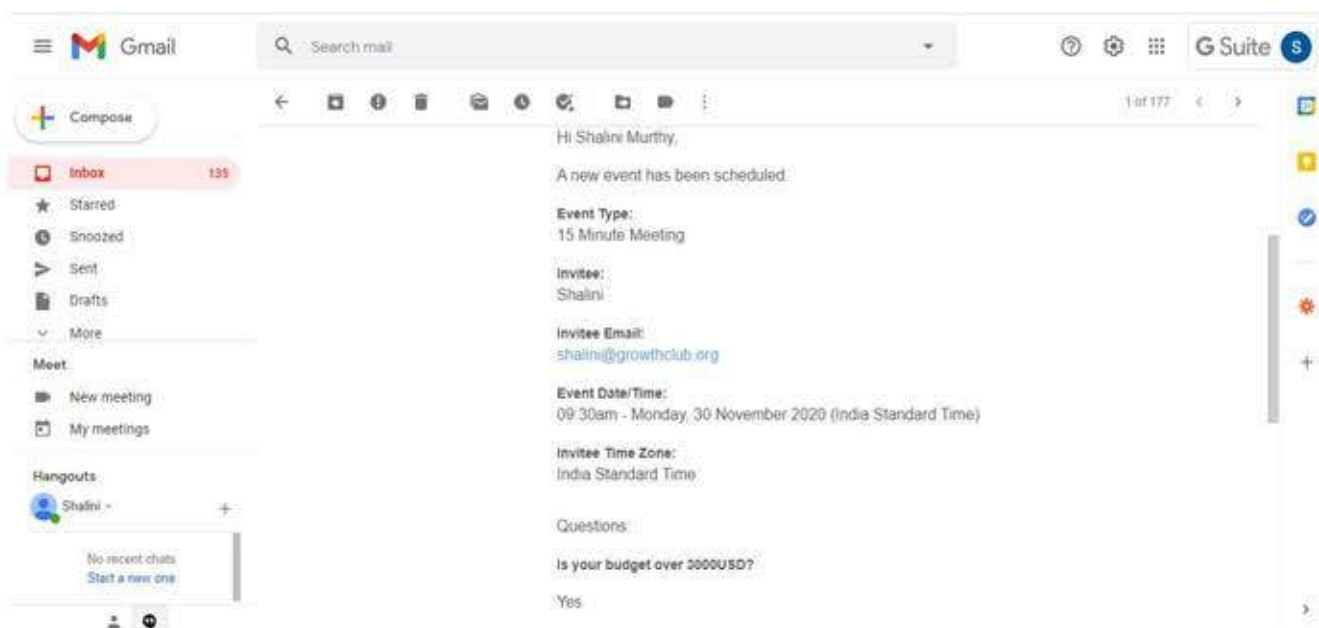
This screenshot is identical to the previous one, but the 'Schedule Event' button at the bottom center is highlighted with a red rectangular box. The 'Email *' field now contains the text 'shalini@growthclub.org', and the 'Is your budget over 3000USD?' question has the 'Yes' radio button selected.



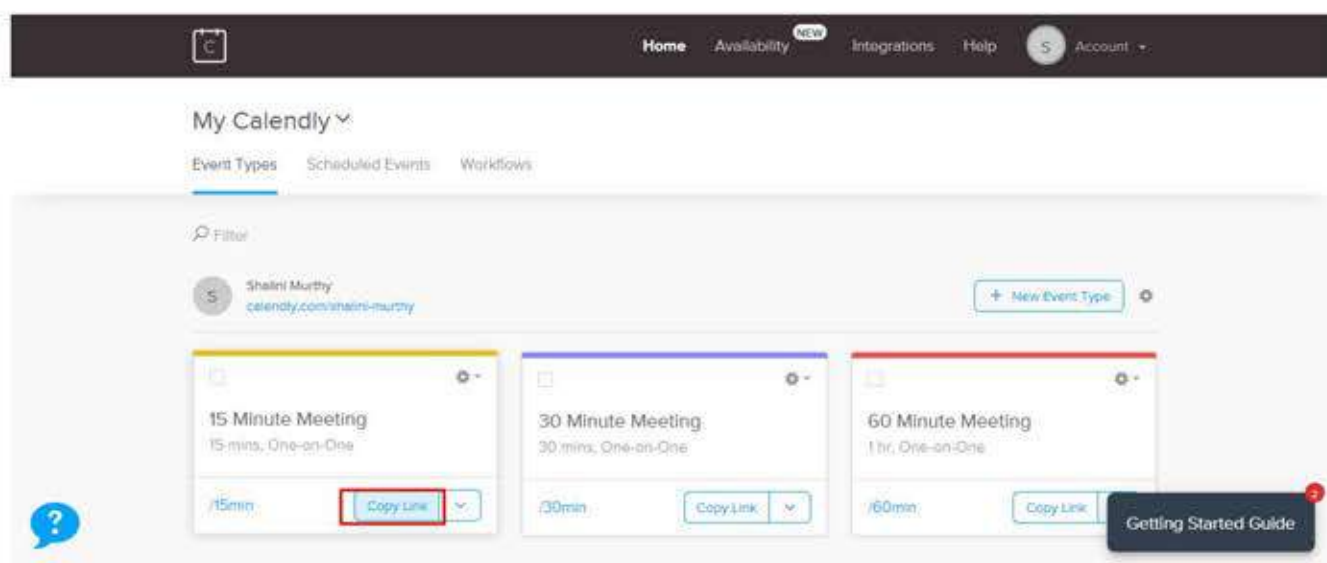
Step 15: You'll also receive an email notification in your inbox.



Step 16: The email will contain all the information from the customer such as the scheduled time and the answers to the custom questions from the form- and you can choose to accept/cancel the event as well.

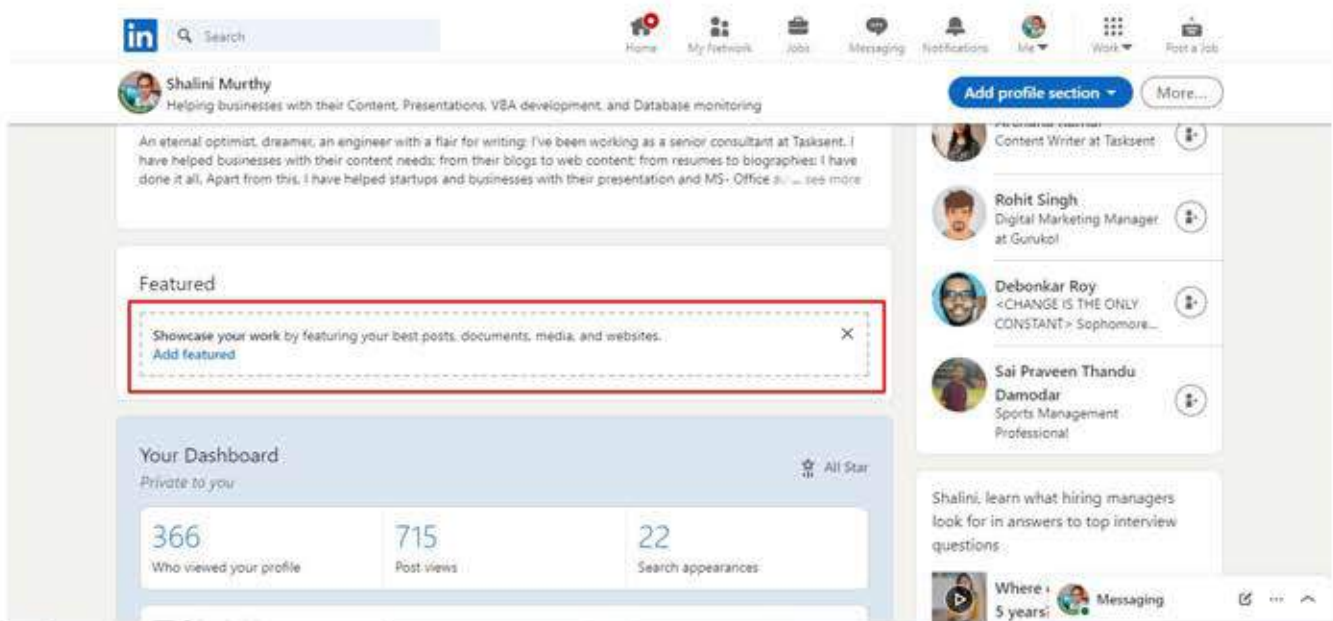


Step 17: Next, it is time to display the Calendly link on your LinkedIn profile page. So, in your Calendly home page, copy the link to the event type. Here I've chosen to copy the link to the first event type, which is the 15 minute meeting.

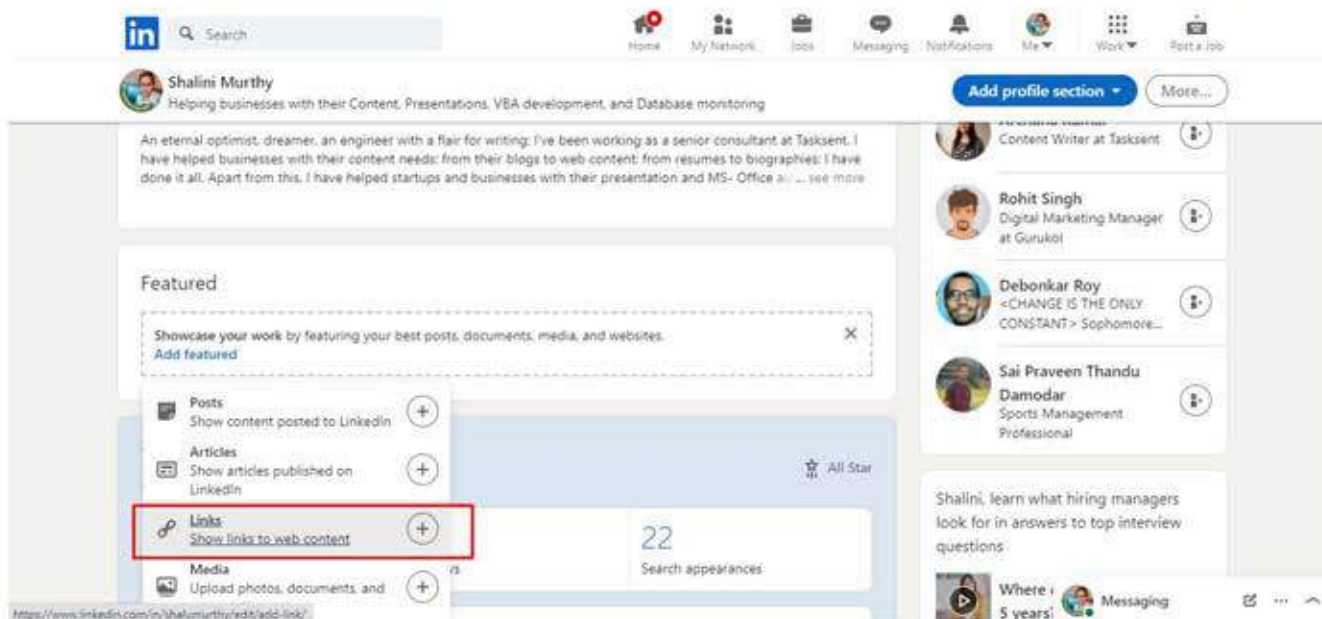




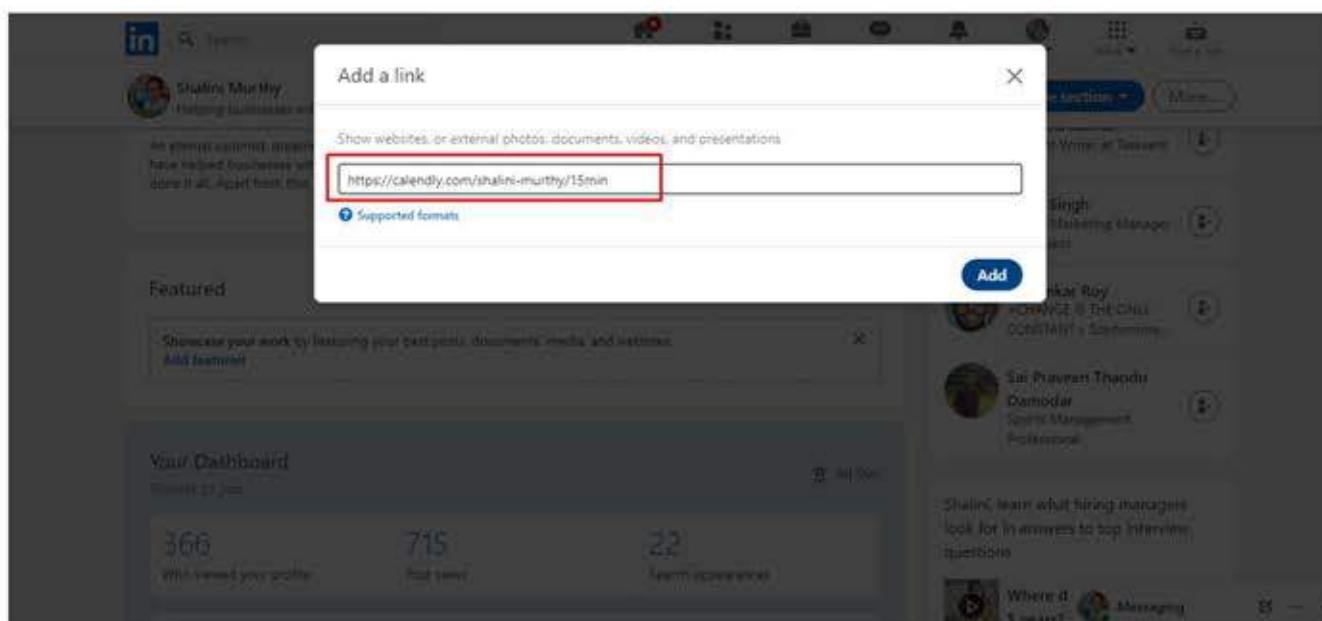
Step 18: Sign into your LinkedIn account and open your profile page to access the featured section. Click on 'Add featured' or on the pencil icon on the top-right corner to add the Calendly link.



Step 19: Click on 'Links' to add the Calendly link to your featured section.

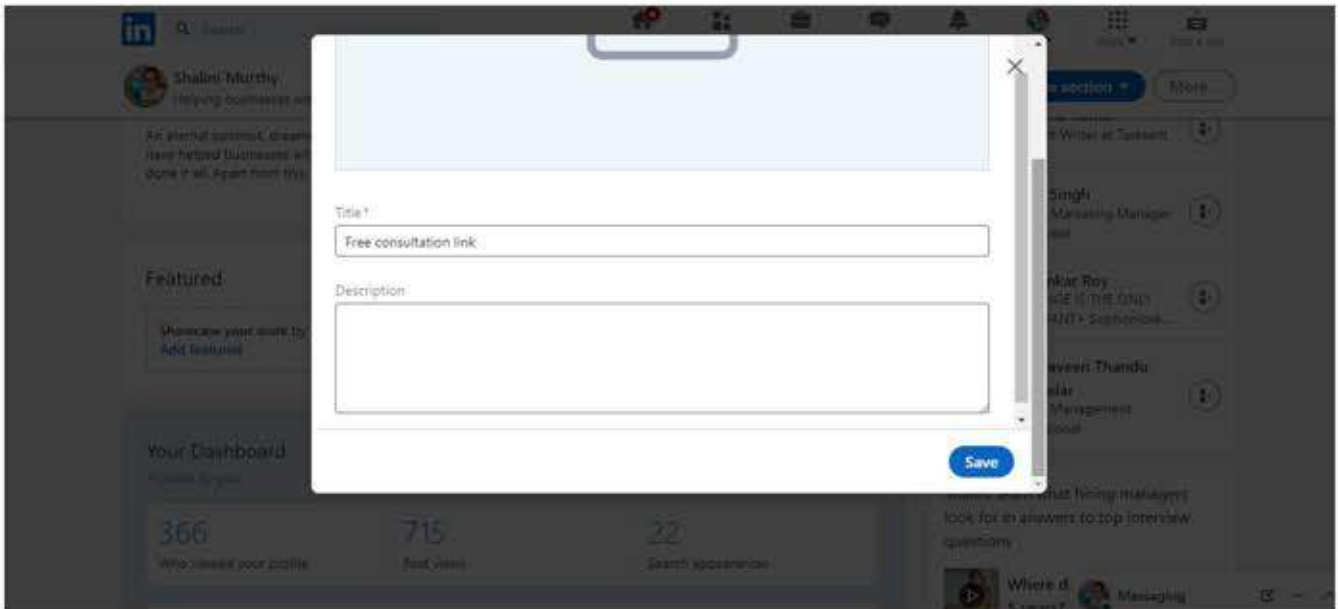


Step 20: Paste the link copied from the Calendly event type and click on 'Add'.





Step 21: It is mandatory to add the title for the link. You can add a description if you like and click on 'Save'.





Step 22: Your calendly link is now added to your LinkedIn profile in the featured section.

