



Getting Started with YouCanBook.me

Follow this quick start guide to get your account up
and running



Step 1 - Invite the Team



Invite all users

Go to [this link to see your Team Management Dashboard](#).

Click this button:

Invite team members



Pending Team

Once all team members have been invited, they will receive an invitation by email that is valid for 7 days. They need to accept this to proceed.



Your team is ready!

Now that the team has been set up, keep them as contributors - or change their roles to editors or administrators.

Step 2 - Create booking pages

Now that your account is up and running and your team is all set, you can start creating your booking pages!





Step 2 - Create booking pages



General Settings

Set up:

- Your booking page title
- The URL
- The description
- Your logo!



Set up your Calendar

- For individual booking pages, check [here](#)
- For Teams booking pages, check [here](#)



Set your times & availability

- Set your availability:
For [Teams](#)
For [Individuals](#)
- Set the duration of your meetings



Step 2 - Create booking pages



Set up the booking form

Create the booking form that the bookers will fill out before they meet with you or your team members.



Set up your Notifications

Set up your email notifications (confirmation emails, reminders, reschedule and cancel options) and the calendar event description.



Set up your Appearance

Add a color to your booking page, and add footer information - if needed.



Step 2 - Create booking pages

Create Notifications

More tips on notifications!

Think of the following options:

- Do you/your team want the ability to reschedule?
- Do you want your bookers to have the ability to reschedule?
- Do you/your team want to be able to cancel?
- Do you want your bookers to be able to cancel?
- What should happen if they can?

Design your notifications

Add your logo/images and any information you and your team needs to receive when a new booking is made - and which information the booker should receive.

You can use shorthand codes and conditional statements to customize the content based on a booking form question, appointment type, or a day of the week.

Create the Calendar Event

Decide the content that will be in the calendar event description - for both you and the booker.

Set a location

Do you want to meet virtually via Zoom or Google Meet? Follow the steps here.

Step 3 - Assign Booking pages

After you created all booking pages, you can assign them to your editors and administrators to help you manage them!





Step 3 - Assign Booking pages

Assign booking pages to team members

Now you can assign the created booking pages to the correct team members.

Quick Tip:

As Account Owner, you might end up with a lot of booking pages for all your scenarios and team members.

Use the folder feature to sort and organize your booking pages based on team, location or department!

That's it for setting up!

If you are interested in more advanced features, always check out our knowledge base!

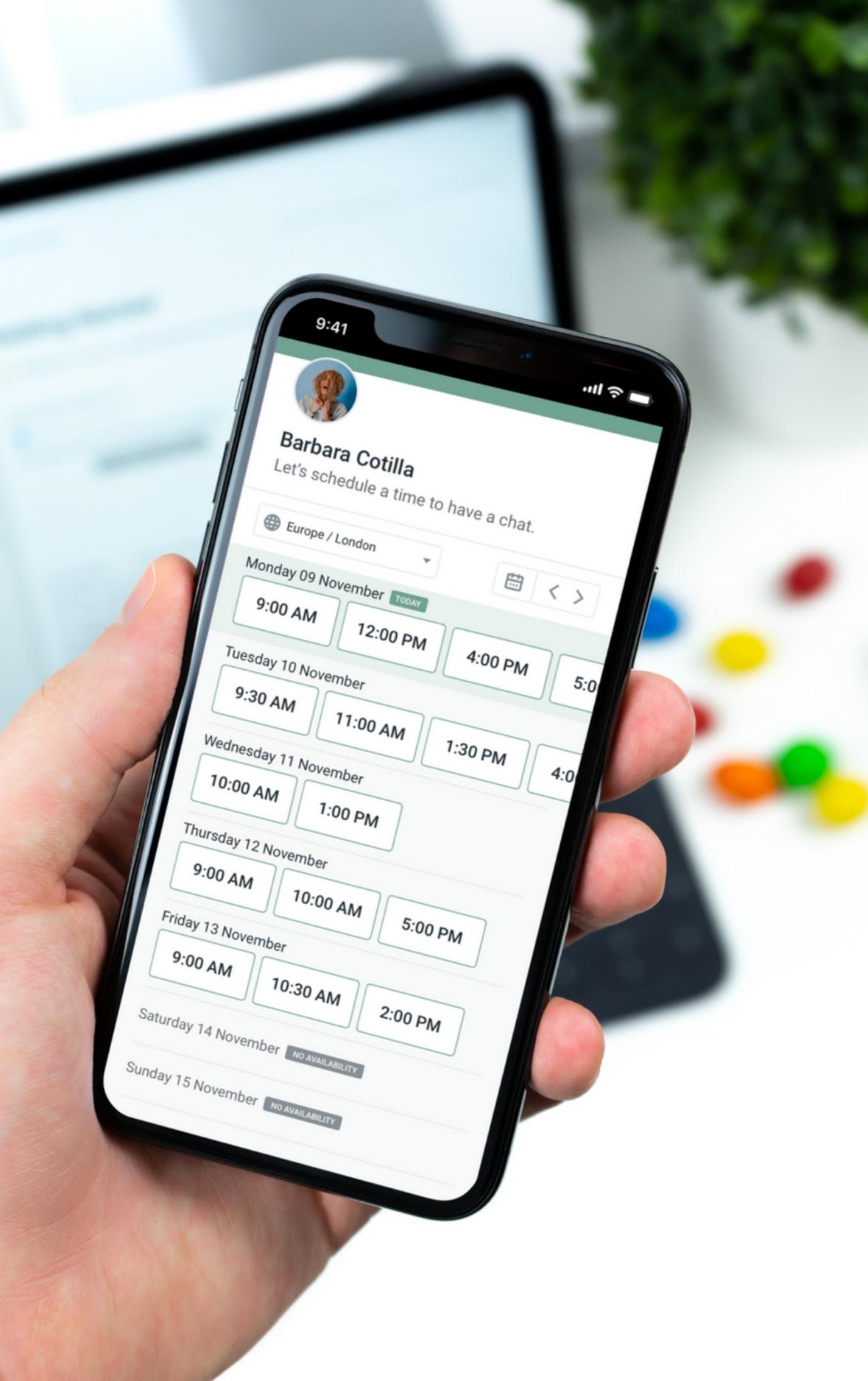
Step 4: Test!

It sounds like you are ready to go!
Now it is very important to test if
everything works accordingly.





Step 4: Test!



Make a test booking

- Think of multiple scenarios the booker could make a booking (PC, mobile device)
- If applicable: reschedule and cancel bookings too - see if the email notifications are sent accordingly
- Ensure your availability is showing correctly!

Go live!

Now that everything is tested and looks good, you are ready to set your booking pages online.



Thank you.

Any questions?
support@youcanbook.me

