



## **Calendly Setup Guide for PPC Agencies**

**NOTE: This guide & video both follow the same process for setting up your Calendly booking link**

### **Goal:**

The purpose of this guide and accompanying video is to help PPC agencies create a free Calendly booking link that integrates with their existing calendar provider. This setup is required so Callerific can schedule qualified PPC consultation appointments directly onto your calendar using your Calendly booking link. Even if your agency already uses another calendar or booking system such as Google Calendar, Outlook, Office 365, or iCloud, Calendly is still required for appointment scheduling automation and availability syncing.

Calendly makes it easy to sync your existing calendar system during their setup process. Calendly smoothly connects your Google Calendar, Outlook, Office 365, or iCloud Calendar so we are able to schedule appointments for you.

## **Purpose of this guide and video:**

To show PPC agencies how to create a free Calendly booking link that allows Callerific to schedule appointments directly onto their calendar.

## **This setup works for:**

Callerific's Free trial appointments

Ongoing appointment setting services that we offer

**NOTE:** No paid Calendly plan is required to get started.

## **Step 1: Create a free Calendly account**

**Calendly Sign Up:** [www.calendly.com/signup](https://www.calendly.com/signup)

Choose one of the following signup methods:

- Email
- Google
- Microsoft

## **Step 2: After confirming your Calendly account in your email**

Complete the Calendly setup process. Calendly will ask you the following questions:

**1. How do you plan on using Calendly?**

Select with my team then click next

**2. How can Calendly help you?**

Select scheduling meetings then click next

**3. Who else is on your team?**

Click skip

**4. What is your role?**

Select marketing then click next

**Step 3: Set up how your Calendar will be used**

**If you signed up to Calendly using a gmail address it will say:**

Example: 'Set up how your Google calendar will be used'

**If you signed up using a different email address, then the wording on this will look different.**

Example: 'Set up how your (email provider) calendar will be used'

Regardless of the language, Calendly is simply asking to connect whichever calendar provider you use so appointments can be scheduled.

**Next:** Depending on your calendar provider, Calendly may instantly connect you to their dashboard like the example in the video, or they may prompt you to click next to be taken to the Calendly dashboard.

## **Understanding the Calendar connection screen:**

During setup, Calendly will ask how your calendar will be used or ask you to connect an account.

This does **not** mean you need to create a new calendar system or set up anything complicated.

Calendly simply connects to your existing calendar so it can:

- check your availability
- prevent double bookings
- automatically place appointments onto your calendar
- generate meeting links automatically

In my video example, Calendly detected my existing Google account automatically because the browser was already signed into Google.

If your agency does not currently use Outlook, Office 365, iCloud, or Google Gmail, the easiest free option is creating a free Google Gmail account. Use the Google Gmail account to sign up for Calendly. Creating a free Google Gmail account instantly gives you access to Google Calendar and Google Meet for appointment scheduling through Calendly.

## **Step 4: Allow calendar permissions**

Calendly asks for permission to access your calendar.

### **Click:**

Continue or Allow to grant Calendly access depending on the prompting.

## **Step 5: Set your availability**

Choose the days and hours you would like Callerific to schedule appointments for you with businesses directly onto your calendar.

In the video I chose the typical, 9 to 5 Monday - Friday business hours.

These settings can be updated at any time.

Click Next.

## **Step 6: How would you like to meet with people?**

Calendly will ask which meeting location you want to use for appointments.

For this example I chose Google Meet.

Google Meet allows Calendly to automatically create virtual meeting links for scheduled appointments.

### **Once someone books an appointment through your Calendly link:**

- A Google Meet link is automatically generated
- The meeting link is added to the calendar event
- Both parties receive the meeting details automatically

This eliminates the need to manually create Zoom or meeting links for every appointment.

If your agency uses another meeting platform such as Zoom or Microsoft Teams, you may choose that option instead. However, Google Meet is often the easiest free option for PPC agencies.

## **Step 7. Calendly Dashboard**

You are all Set Up! After completing Step 6 you are automatically taken to the Calendly dashboard.

Calendly creates a default event called:

“30 Minute Meeting”

### **How to Get Your Appointment Link To send To Us:**

The scheduling tab located in the left side menu should be selected.

Next make sure the event types tab is selected in the center of the dashboard.

Click the copy link button to the right of the appointment you just set.

Appointments are also called events according to Calendly.

Send this link to us at [info@callerific.com](mailto:info@callerific.com) so we can schedule appointments for you.

To edit your appointment link or event, click directly on the meeting name.

After clicking it you can edit the name of the meeting or the days & times you are available for meetings.

**NOTE:** Sharing your Calendly link with us is easy. You do not need to add Callerific as a team member. You do not need to give us access to your account. Simply copy your appointment link and send it to us at [info@callerific.com](mailto:info@callerific.com)

**NOTE:** By default Calendly will collect the name and email of the person you will have the meeting with. We strongly recommend that you do not add additional fields that we would need to gather from businesses, such as phone number, business name, etc. All that's needed is the name and email. We have already screened these companies to be legit and we have had a conversation with them to make sure they have expressed interest in your services and having a meeting with you.