


Creating groups for booked meetings

To create groups for booked meetings,

1. Go to Configure -> Groups and click on the  icon
2. Enter the name of the group and select **Queue Reservation** as the Group Type

New group

Name

Group type

Time Zone

Dialogue: Start message

Dialogue: Signature

3. Enter the Start or welcome message and signature message as required. Click Save before proceeding to the next tab
4. Go to **Bookable hours** tab to view recurring bookable hours by selecting the option from the drop down menu. To manage or change the settings for meeting slots, Go to Engage -> Banner and choose the Queue reservation banner you wish to modify.
 - a. In the Edit banner window, go to **Settings** tab. Here you can define the opening hours, change maximum weeks and minimum hours ahead that a visitor can book the meeting, the number of weeks a visitor is able to see in order to book a meeting and other settings.

Edit banner: Booked meetings -demos

General **Settings** HTML CSS Subject mapping

Translations

Display banner when

Open

Busy

Closed

Settings in calendar

Start day at: End day at:

Max weeks ahead: Min hours ahead: Length of week:

Meeting duration override:

First day of the week is Monday

Require phone number when visitor makes a reservation

Apply "Min hours ahead" as calendar time (as opposed to bookable time)

Show the week with the first available slot when loading the calendar

Disable automatic scrolling to the form when making a reservation

b. Click **Save** before you proceed to other tabs

5. If you wish to define a interval where you either close booked meetings for a period of time or wish to make changes the opening hours, you can create an override period and modify the dates, hours etc.

i. Go to Configure -> Groups -> Bookable hours -> Select **Create a new override** option from the drop down and enter the time frame for which the override must apply

Bookable hours

Click on the weekday column to configure the bookable hours for the selected day. You can navigate in the calendar to preview your configured bookable hours

Create a new override period (e.g. different bookable hours during vacation period) ?

From:

To (end of day):

ii. Click on one of chosen dates column to bring up the **New override period** window. Fill in the checkboxes of the days you wish to make changes in and click on **New Block** icon.

New override period: 2022-04-04 - 2022-04-07 ✕

Bookable blocks

Create new block

Open between: 08:00 - 14:00 On workdays

Meeting intervals: 60 minutes

Simultaneous meetings: 2

Add block Cancel

Apply to weekday(s):

Mon
 Tue
 Wed
 Thu
 Fri
 Sat
 Sun

Preview Close

iii. Enter the time range and click on **Add Block** button. A new override period will be created.

Bookable hours

New override period: 2022-04-04 - 2022-04-07 ✕

Bookable blocks

08:00 - 14:00 On workdays Edit

Meeting intervals: 60 minutes

Simultaneous meetings: 2

+ New block

Apply to weekday(s):

Mon
 Tue
 Wed
 Thu
 Fri
 Sat
 Sun

Preview Close

iv. Click on **Preview** and Save the configuration to see the override block in your calendar

Recurring bookable hours

Apr 4 - 10, 2022 today < >

| | Mon 4th | Tue 5th | Wed 6th | Thu 7th | Fri 8th | Sat 9th | Sun 10th |
|---------|-------------|-------------|-------------|-------------|---------|---------|----------|
| all-day | | | | | | | |
| 8:00 | 2 available | 2 available | 2 available | 2 available | | | |
| 9:00 | 2 available | 2 available | 2 available | 2 available | | | |
| 10:00 | 2 available | 2 available | 2 available | 2 available | | | |
| 11:00 | 2 available | 2 available | 2 available | 2 available | | | |
| 12:00 | 2 available | 2 available | 2 available | 2 available | | | |
| 13:00 | 2 available | 2 available | 2 available | 2 available | | | |
| 14:00 | | | | | | | |
| 15:00 | | | | | | | |
| 16:00 | | | | | | | |
| 17:00 | | | | | | | |
| 18:00 | | | | | | | |
| 19:00 | | | | | | | |

- Select the users to be part this group by toggling to the **Users** tab and selecting the users from the list. Click **Save**.
- Select Case types to be made available to this group and click **Save**

8. Go to **Features** tab to enable file sharing and allow the agent to start the conversation in Co-browsing mode. Click **Save**.