Creating groups for booked meetings

To create groups for booked meetings,

1. Go to Configure -> Groups and click on the **+ New group** icon

2. Enter the name of the group and select **Queue Reservation** as the Group Type

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

08:00   17:00

Max weeks ahead   Min hours ahead   Length of week

5   ∨   1   ∨   5   ∨

Meeting duration override

minutes

☑ 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)

2022-04-04   🗓   2022-04-08   🗓

      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.

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

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

6. Select the users to be part this group by toggling to the **Users** tab and selecting the users from the list. Click **Save.**

7. 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**.