


## 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

Queue Reservation

Time Zone

UTC

Dialogue: Start message

Dialogue: Signature

Save

Cancel

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.

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
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Preview
Close

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

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
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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							

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**.