

# Appointments

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This article applies to:

[Pro](#)

[Max](#)

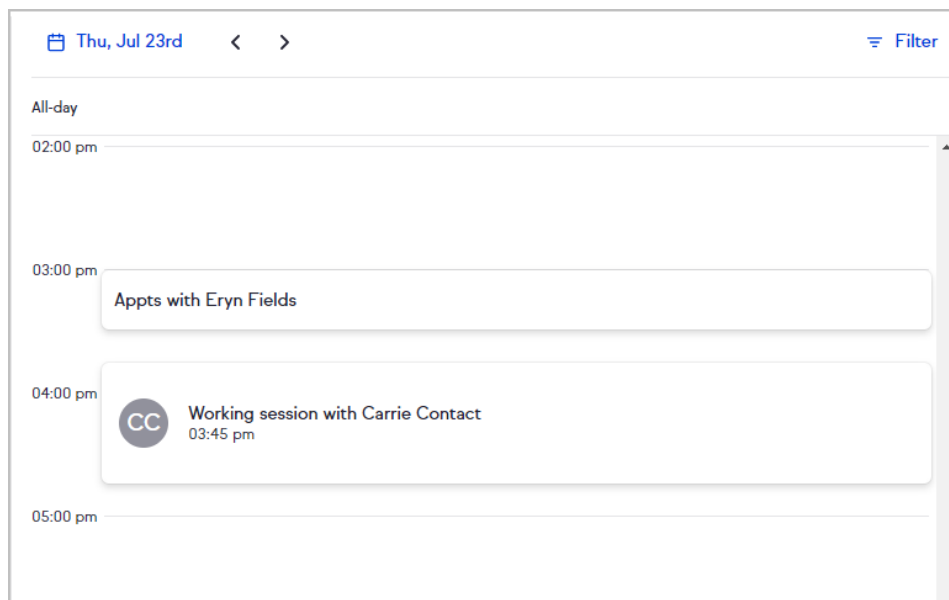
With Keap Appointments, you can manage your schedule by viewing, rescheduling, or canceling appointments with ease. Quickly send your booking link to contacts via email or text, or use share the link online or in an automation.

**Note:** To setup your Google Calendar [click here](#) and to setup your Outlook Calendar [click here](#).

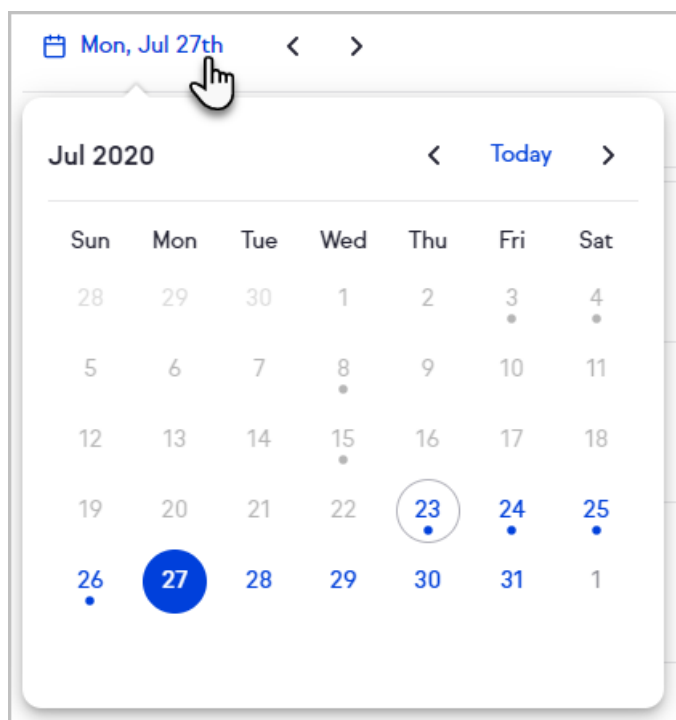
1. [Appointments overview](#)
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## Appointments overview

On the right side of the Appointments page is your daily schedule



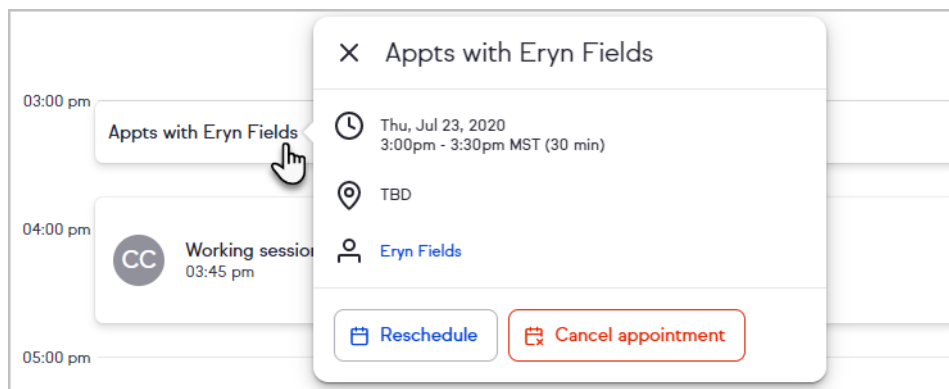
Click the date above your daily schedule to select and view another date. Today's date is circled, the date you are viewing is a solid circle, and days with calendar events have a dot beneath them.



## Appointment details

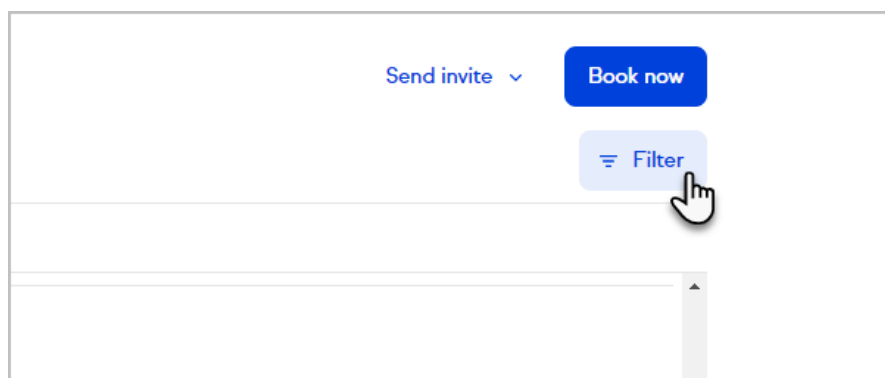
Click an appointment to view details of the appointment. There are options to **Reschedule** or **Cancel** the appointment. For more information regarding rescheduling and/or canceling an appointment, [click here](#).

Events created on your Google or Microsoft calendar will be displayed on your Keap calendar, but cannot be edited in Keap. These events can be edited from your external calendar account.

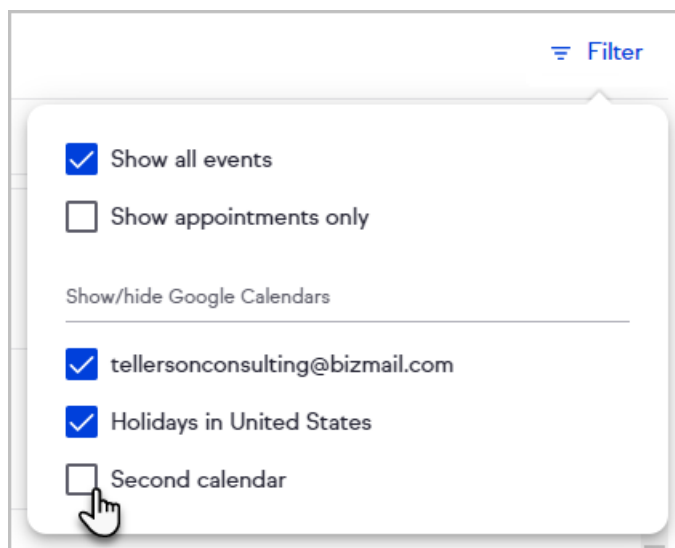


## Appointment filtering

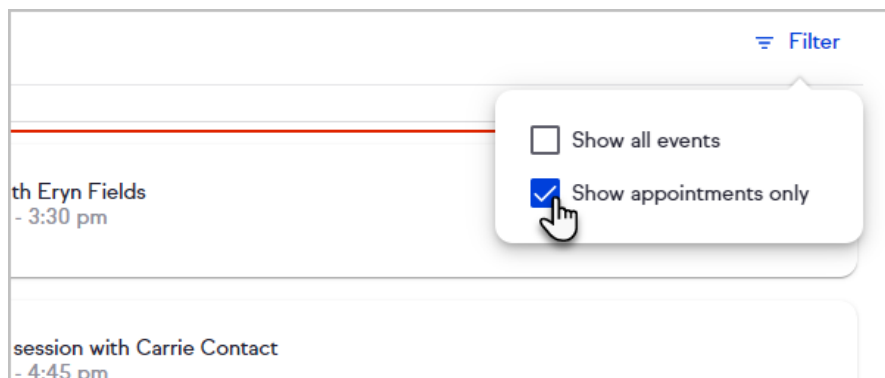
1. Click on **Filter**



2. Select the calendars you want to display events from

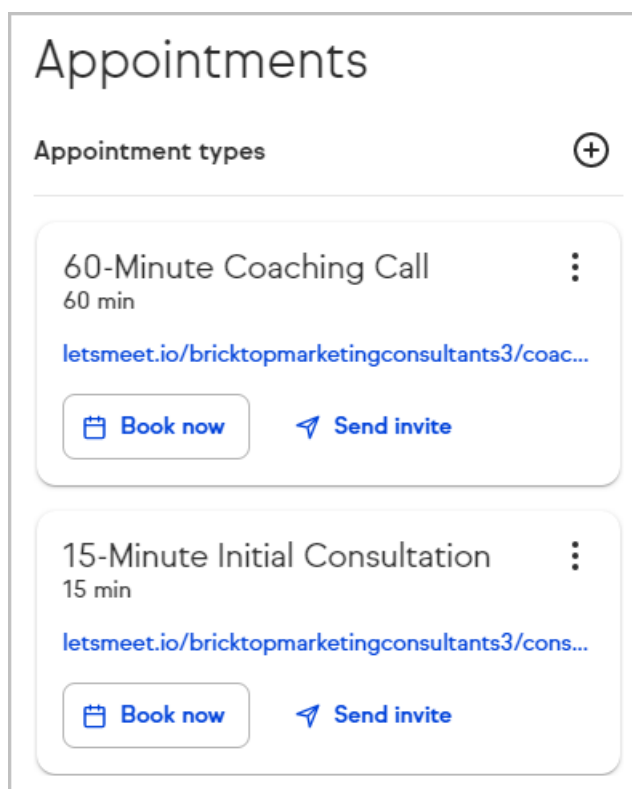


3. Or select if your calendar should **Show all events**, including ones not made by Keap, or **Show appointments only**, to only see Keap events



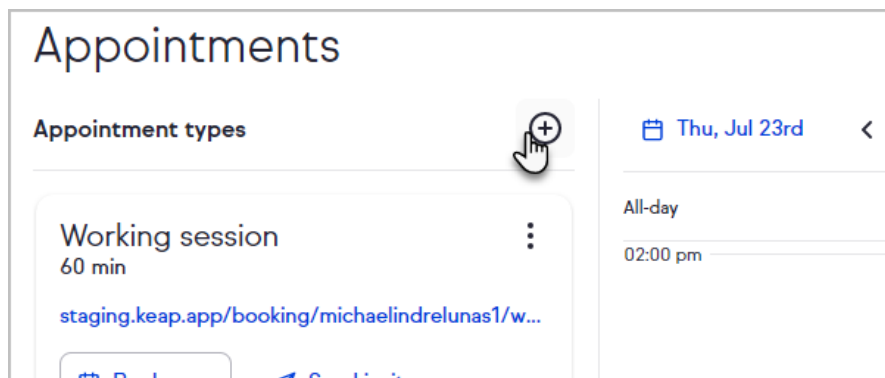
## Default appointment types

After connecting your calendar, Keap will automatically create two appointment types for you: a 15 minute "Initial Consultation" and 60 minute "Coaching Call". You can use, edit, or delete these appointment types as desired.



## Add an appointment type

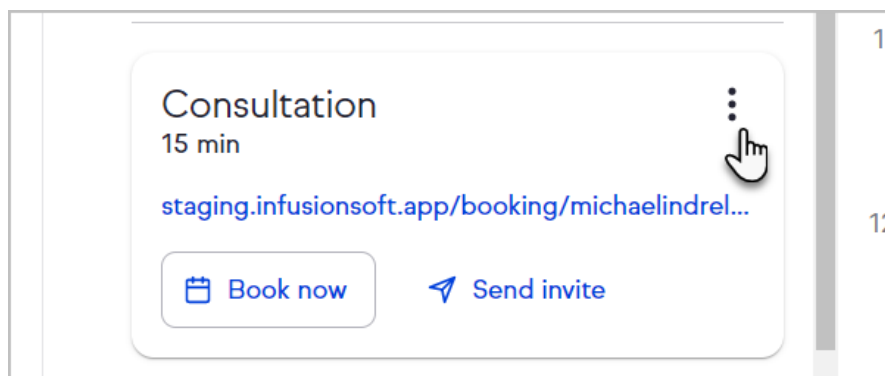
1. Click the "+" button



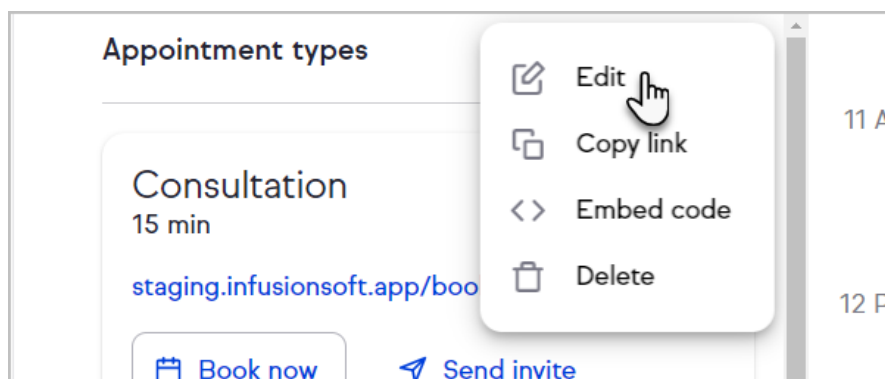
Continue setup process as previously documented [here](#)

## Edit appointments

1. Navigate to the **Appointments** page
2. Open the more options menu for the appointment type you want edit



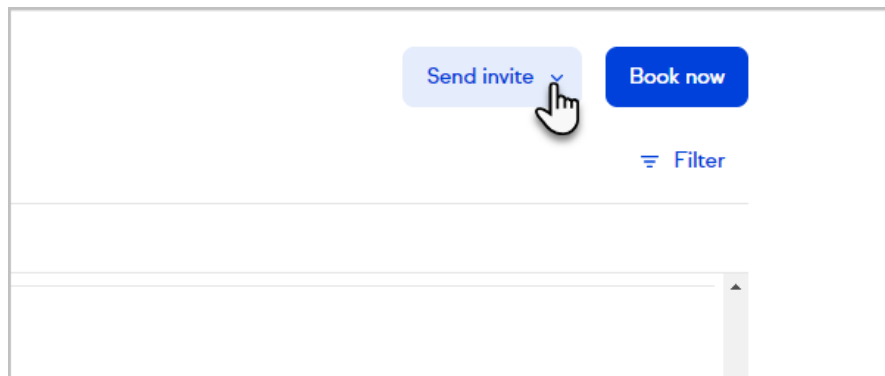
3. Click **Edit**



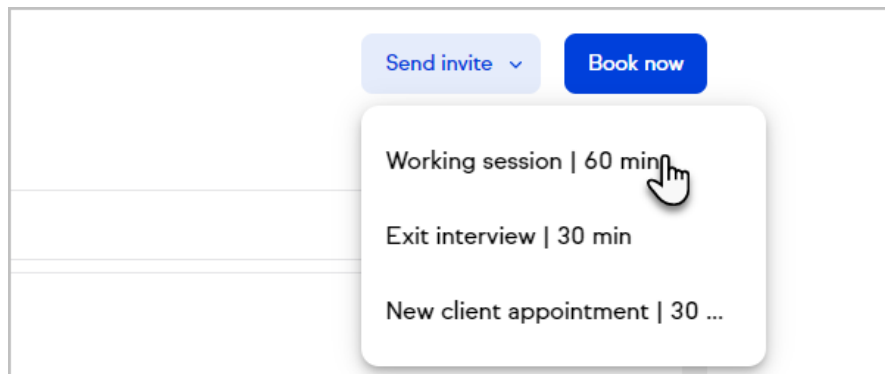
## Sending appointment links

You can send an email or SMS message ([Keap Business Line](#) required) with your booking link from the Appointments page.

1. Click the **Send invite** button



2. Select which appointment link to send



3. Select **Email** or **Text**

**Note:** Sending a link via text requires [Keap Business Line](#)

4. Enter the name of an existing contact or add a new one

A screenshot of the 'Send invite' form. At the top, there's a title bar with a close button and the text 'Send invite'. Below it are two tabs: 'Email' (selected) and 'Text'. The form has fields for 'To:', 'From:', 'Subject:', and 'Body:'. The 'From:' field is pre-filled with '+ Add new contact'. The 'Subject:' field is pre-filled with 'Michael Gmail' and 'michael.indrelunas@keap.com'. The 'Body:' field is empty.

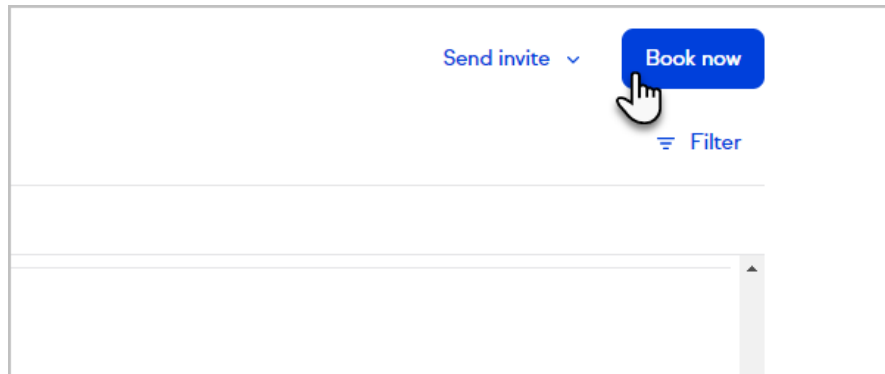
5. Edit message as needed

6. Click **Send**

A screenshot of the bottom of the 'Send invite' form. It shows a 'Signature' toggle switch, three icons (pencil, calendar, list), and a 'Send' button. A hand cursor is clicking the 'Send' button. The body of the message contains a URL and the text 'Thank you,'.

## Book an appointment on your calendar

1. Click the Book now button above your daily schedule or by on appointment type



2. Search for or add a new contact

A screenshot of a 'New appointment' form. The title is 'New appointment' with a close button (X) on the left. Below the title is the subtitle 'Select a contact and appointment type'. There are two dropdown menus: the first is labeled 'Search for a contact to meet with\*' and the second is labeled 'Appointment type\*' with the selected option 'Working session | 60 min'. At the bottom is a blue button labeled 'Continue and select time'.

3. Select the appointment type

A screenshot of the appointment type selection dropdown. The dropdown is open, showing three options: 'Working session | 60 min' (highlighted in blue), 'Exit interview | 30 min', and 'New client appointment | 30 min'. A hand cursor icon is pointing to the 'Working session | 60 min' option.

4. Click **Continue and select time**

A screenshot of the 'New appointment' form. The title is 'New appointment' with a close button (X) on the left. Below the title is the subtitle 'Select a contact and appointment type'. The first dropdown menu is labeled 'Search for a contact to meet with\*' and has the selected contact 'Eryn Fields (test@keap.com)'. The second dropdown menu is labeled 'Appointment type\*' and has the selected option 'Working session | 60 min'. At the bottom is a blue button labeled 'Continue and select time' with a hand cursor icon pointing to it.

5. Select a date and time to book

<

Today

>

Thu	Fri	Sat
2	3	4
9	10	11
16	17	18
23	24	25
30	31	1

Friday, July 24 2020

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09:00 AM - 10:00 AM	Book now
09:15 AM - 10:15 AM	Book now
09:30 AM - 10:30 AM	Book now
09:45 AM - 10:45 AM	Book now
10:00 AM - 11:00 AM	Book now
10:15 AM - 11:15 AM	Book now

6. Click **Confirm**

u

Fri	Sat
3	4
10	11
17	18
24	25
31	1

09:00 AM - 10:00 AM	Book now
09:15 AM - 10:15 AM	Confirm
09:30 AM - 10:30 AM	Book now
09:45 AM - 10:45 AM	Book now
10:00 AM - 11:00 AM	Book now


7. Choose to view your appointments, view the contact you just booked, or close the success window

×

Success

High five Michael!

Your Working session with Eryn Fields has been scheduled!



View appointments

View contact



## Appointment reminders

When you use Keap Appointments, your invitees will automatically receive reminders 24 hours and 1 hour before their appointment. You can customize these reminders in [Easy Automations](#) by changing the frequency or content of the reminders.

