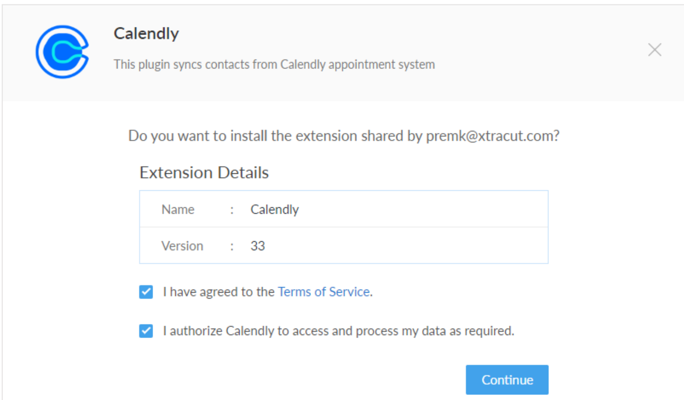
Welcome to Calendly!

Overview:

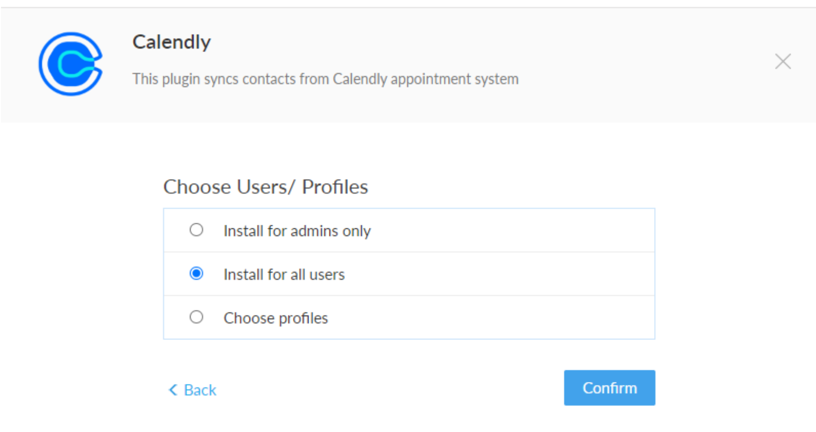
- Calendly is an exceptional online meeting scheduling software that revolutionises the way you schedule appointments.
- With Calendly's seamless integration into Zoho CRM, you can effortlessly book meetings and classes, access comprehensive appointment histories, and manage client details for each Calendly agent, all within the Zoho CRM platform.
- Moreover, you can synchronise Calendly agents with corresponding CRM users, ensuring optimal efficiency and accuracy.
- Experience the unparalleled convenience and productivity of Calendly combined with the power of Zoho CRM, making it the ultimate choice for streamlined appointment scheduling and client management.

Step by step Guide!

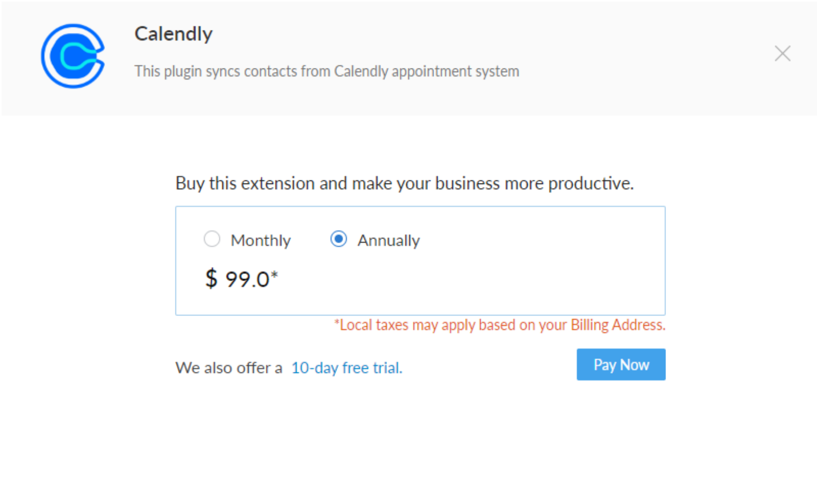
- Once you click the "Install" button, it will navigate you to the installation page.



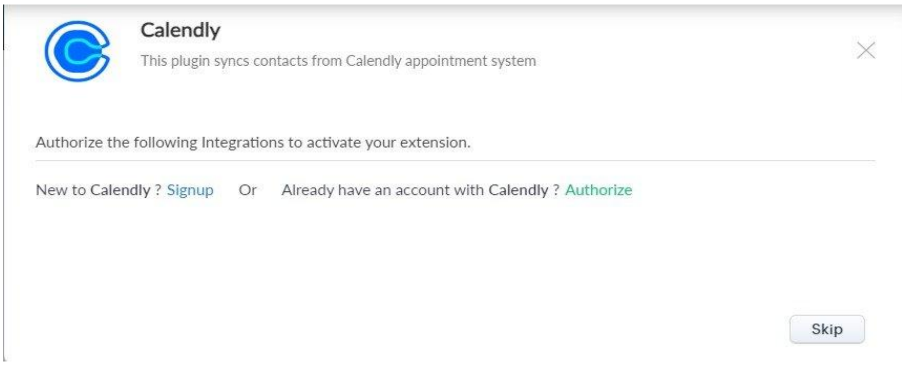
- Review the permissions requested by the Calendly app. These permissions determine the access and capabilities the app will have within your Zoho account.
- If you're comfortable with the permissions, click on the checkbox button. The installation process will begin.
- Once you have checked the box, tap on the "Continue" button to proceed to the next steps.



- After clicking the "Continue" button, you will be directed to the next step. Here, you need to click on the "Install for All Users" radio button and then click on the "Confirm" button to proceed.



- After selecting the "Install for All Users" radio button and clicking on the "Continue" button, you will be presented with the plan options. You can choose between the monthly or yearly paid plans or opt for the free version, depending on your preferences and requirements. Select the desired plan by clicking on the corresponding option and then proceed to the next step.



Now that the installation process is complete, you will need to authorize the CRM setup. To do this, follow these steps:

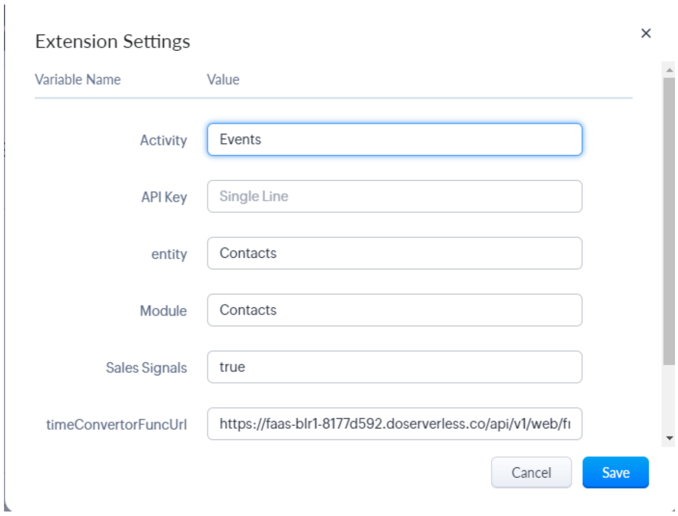
1. Look for the authorization prompt or section within the installation interface.

2. Click on the "Authorize" button to initiate the authorization process.

3. You may be redirected to the Calendly website or a separate authorization page.

4. Follow the on-screen instructions to provide the necessary permissions and grant access to Calendly for integration with your Zoho CRM.

5. Once you have authorised the CRM setup, click on the "Proceed" button to continue.



After completing the authorization and proceeding to the next step, the extension settings tab will appear. In this tab, you will need to provide the API key for Calendly. Here's how you can do it:

1. Locate the field or section where you can enter the API key within the extension settings tab.

2. Retrieve your Calendly API key from your Calendly account. You may need to log in to Calendly and access your account settings or developer settings to find the API key.

3. Copy the API key from your Calendly account.

4. Paste the API key into the corresponding field within the extension settings tab.

5. Once you have entered the API key, click on the "Save" or "Save Settings" button to save the changes.

If you do not have the API key at the moment or prefer to configure it later, you can simply close the window or navigate away from the settings tab. However, keep in mind that without providing the API key, certain functionalities or integrations with Calendly may not work properly within the Zoho CRM.

That's great to hear! Congratulations on successfully completing the installation and setup process for Calendly in the Zoho Marketplace. You can now start utilizing Calendly's features and enjoy its benefits within your Zoho CRM.

To access the settings for the Calendly plugin in Zoho CRM, follow these steps:

1. In the top right corner of the CRM page, locate the marketplace icon. It may appear as a shopping bag or a briefcase.

2. Click on the marketplace icon to open the Zoho Marketplace.

3. Once you are in the marketplace, navigate to the "Installed Plugins" tab. This tab should display a list of the plugins you have installed in your Zoho CRM.

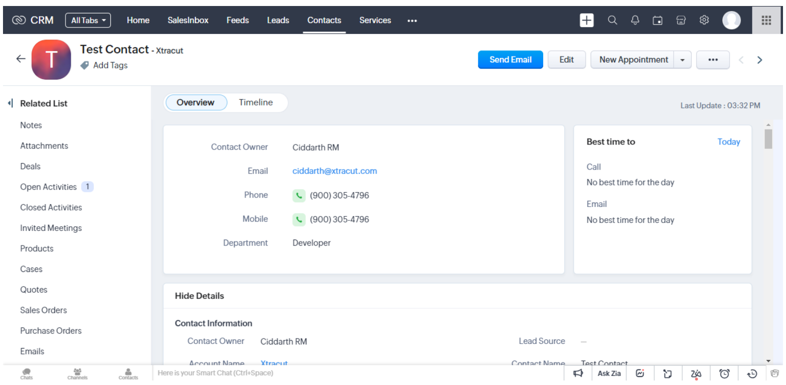
4. Look for the Calendly plugin in the list and click on it to open its details page.

5. On the Calendly details page, you should find a "Settings" option. Click on the "Settings" link to access the configuration options for Calendly.

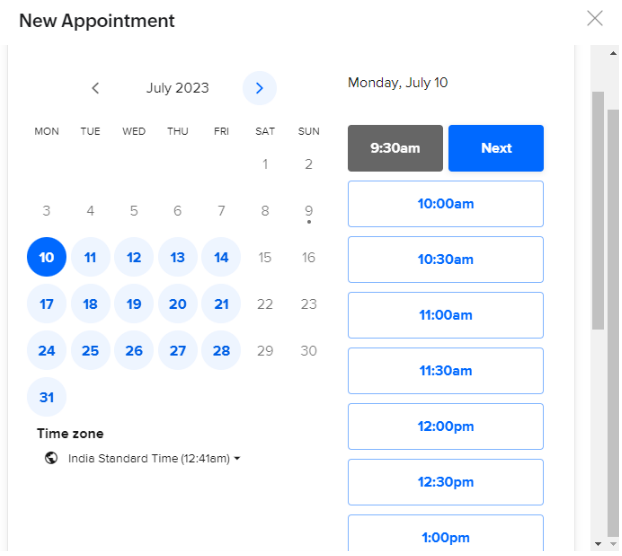
6. The settings page will allow you to customise and fine-tune the integration between Calendly and Zoho CRM according to your preferences.

7.Here, you can change the settings of Calendly to customise how it integrates with your CRM. For example, you can configure the mapping of Calendly meetings to CRM tasks or map leads created through Calendly to specific CRM contacts. These settings allow you to align Calendly's functionality with your specific CRM workflows and preferences.

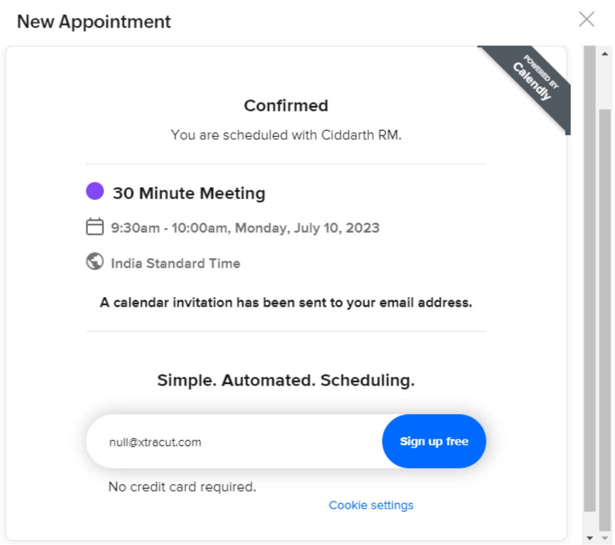
To Book appointment for leads and contacts,follow these steps:



1. Click on the "Leads" or "Contacts" tab located on the top bar.
2. From the leads or contacts list, select the customer with whom you want to schedule an appointment.
3. Once you've chosen the customer, click on the "New Appointment" button located in the top right corner of the page.
4. A new dialog box will appear, presenting available meeting schemes or options. Select the one that suits your preference.



5. After selecting the meeting scheme, a calendar will appear. Choose the desired date and time for the appointment.
6. Once you've selected the date and time, click on the "Next" button.
7. An overview page will appear, displaying all the appointment details. Review the information to ensure accuracy.
8. Finally, click on the "Schedule Event" button to confirm and schedule the appointment for the leads or contacts.



9. Great! The appointment has been successfully scheduled for the leads or contacts.