THE TOOLBOX · BUSINESS HUB OS CRM · LESSON 23

Booking Calendar — Field Guide

Create your booking calendar · Watch time 6:02

A booking calendar is a booking page your customers and your AI share. Describe the job once, in plain words, and the page only ever offers times you can really make — with your hours, your rules, your team, and your service area built in.

BUILD YOUR CALENDAR — THE STEPS

1. **Open Calendars.** In your sub-account, click **Calendars** in the left menu, then **New Calendar**. A calendar is a booking page: people pick a time on it, and your AI books leads onto it by text, chat, or phone.
2. **Describe it in plain words.** What it's for, how long it takes, where it happens, and your hours — the way you'd brief a new receptionist. Click the arrow and the assistant builds the draft for you.
3. **Check it and create it.** Review the draft: the name customers see at the top of the page, your booking link, and **Where it happens** — at their address, at your place, a phone call, or a video call. Then click **Create Calendar**.
4. **Set your hours.** Under **Hours**: these are the only times people and your AI can book. Each day has its own times — turn a day off, or add a second block around a lunch break.
5. **Block time off and holidays.** Click **Block Time Off** for vacations and personal time, and **Holidays** to tick the ones you close for (or select all federal). Appointments already booked stay put.
6. **Set the booking rules.** Under **Appointments**: exact times, arrival windows (8–10), or full days. Add a **buffer after booking** for drive time, a **minimum notice** so nobody books you 10 minutes from now, and how far ahead people can book.
7. **Set capacity. People per time slot** is how many jobs can run at once — two trucks, make it two. **Max bookings per day** caps the whole day.
8. **Pick who gets booked.** Under **Team**: **Single host** sends every booking to one person; **Round robin** takes turns and only shows a time if one of them is free; **No assignment** is for crews who don't log in.
9. **Draw your service area.** Under **Service Area**, turn it on, drop the pin on your town, and set the radius. Choose what outsiders get: turned away kindly, or the appointment held for your team to decide — and write what to tell them. Only new leads are checked; your existing customers are never touched.
10. **Finish and go live.** Set the **booking form** fields and your own questions (a choice, a short answer, even a photo), **pricing** and a deposit under Charge to Book if you want one, and the confirmation and reminder **texts**. Click **Save** — your calendar is live. **Copy link** and put it on your website, your Google profile, or in a text.

WHAT GOOD LOOKS LIKE

- **The calendar only offers times you can really make** — hours, time off, and holidays honored for customers and for the AI alike.
- **Nobody outside your service area gets booked by accident** — they're turned away kindly or held for your call, and existing customers are never fenced out.
- **Every booking respects your rules** — drive-time buffers, minimum notice, capacity per slot, and a cap on the day.
- **Bookings land on the right person** — round robin keeps it fair, and team busy times mean nobody is offered a time they're already booked.