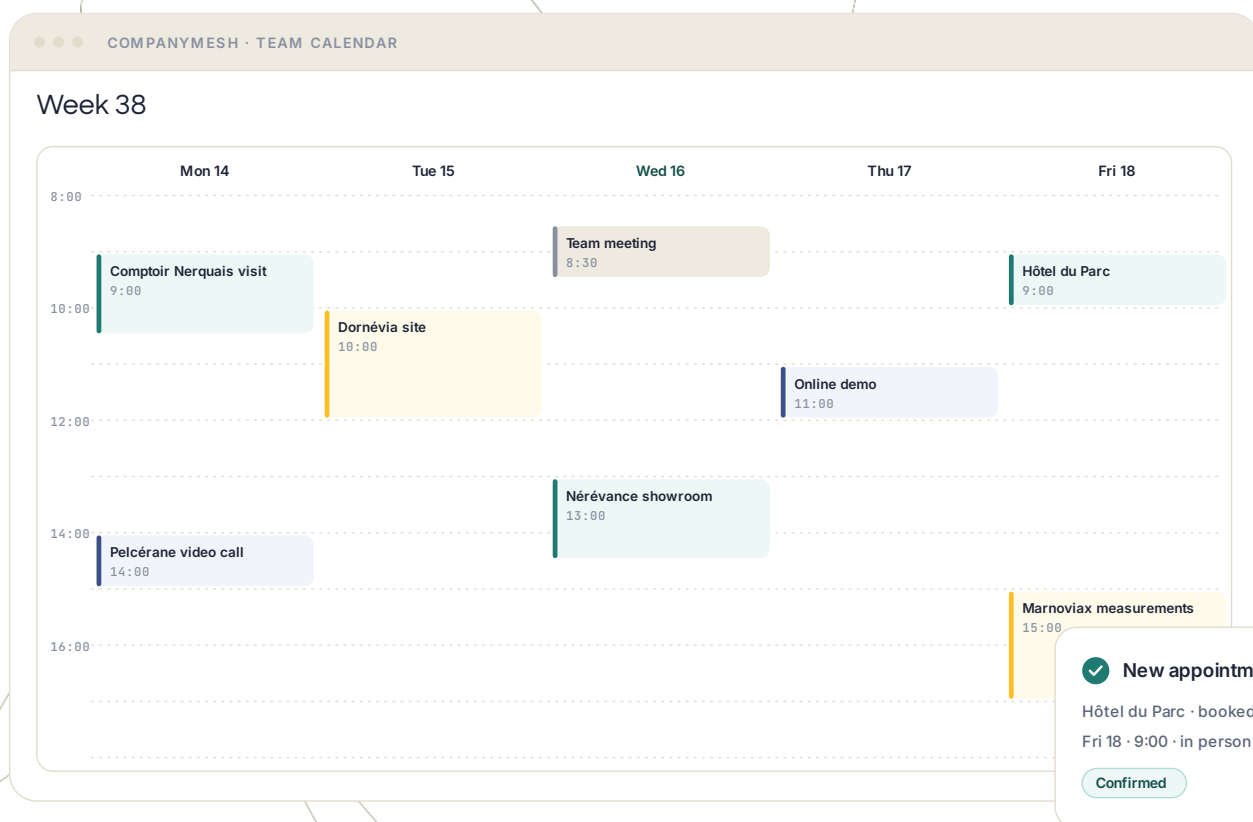


CRM — CUSTOMER RELATIONS

# Calendar & appointments

Appointments that book themselves.



# Appointments that book themselves.

Going back and forth to set an appointment wastes everyone's time. The Calendar module publishes your availability, lets customers book online and organises the whole team's schedule, in person, by video or on site.

## Less back and forth

Customers pick a free slot on their own.

## A coordinated team

Shared calendars, colours per person, team views.

## Appointments kept

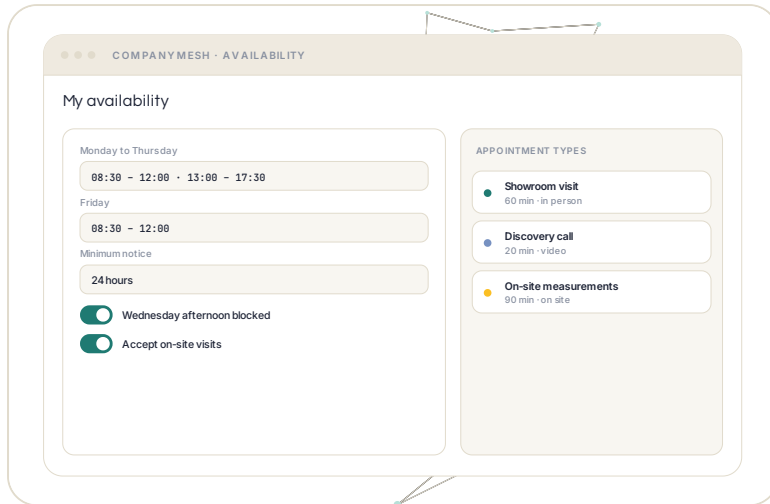
Automatic confirmations and reminders.

## Everything linked to the customer

Each appointment is added to the customer history.

## In this module

- 1 Availability under control
- 2 Online booking
- 3 Team calendar
- 4 Confirmations and reminders
- 5 Sync with your calendars



## 1 Availability under control

**You decide when people can book you.**

Define your open slots, blocked days, breaks and the minimum notice before an appointment. Each team member has their own settings.

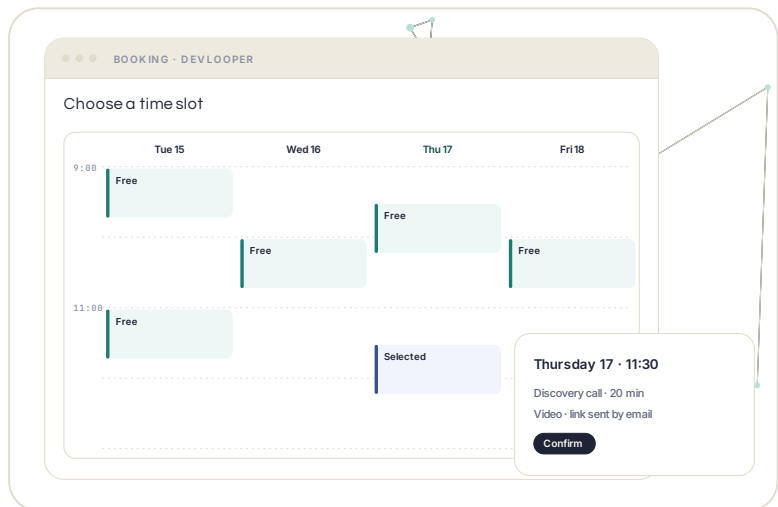
### What it enables

- Time slots per day and per person
- Blocked days and unavailable periods
- Minimum booking notice
- Availability per appointment type

## 2 Online booking

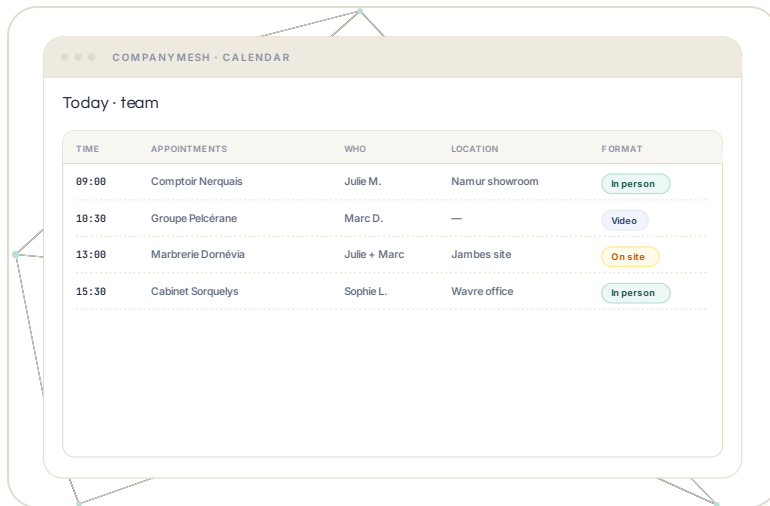
**Your customer chooses, you confirm.**

A booking page, embeddable on your website or sent as a link, only offers slots that are really free. The customer chooses the format: in person, video or on site.



### What it enables

- On-brand booking page
- Choice of appointment format
- Custom pre-booking questions
- Instant email confirmation



### 3 Team calendar

**Who's doing what, and where.**

A week or month view brings the team's calendars together, each with its own colour. Appointments can involve several colleagues and an office or site address.

#### What it enables

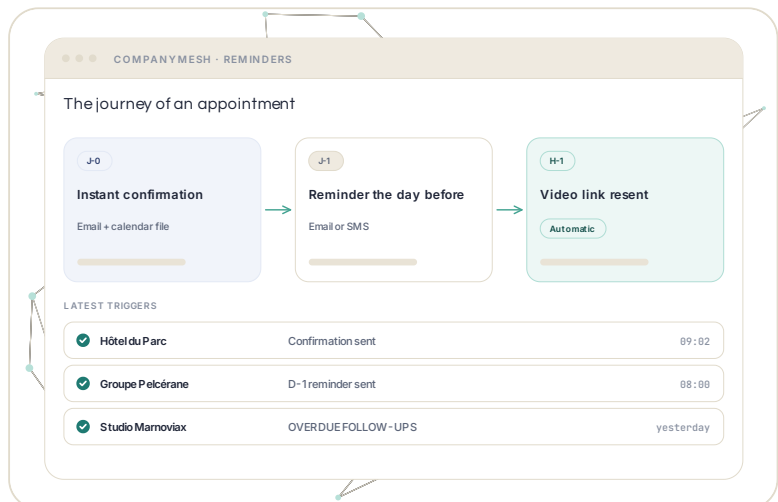
- Day, week and month views
- Colours per team member
- Appointments with several participants
- Office addresses and meeting locations

### 4

## Confirmations and reminders

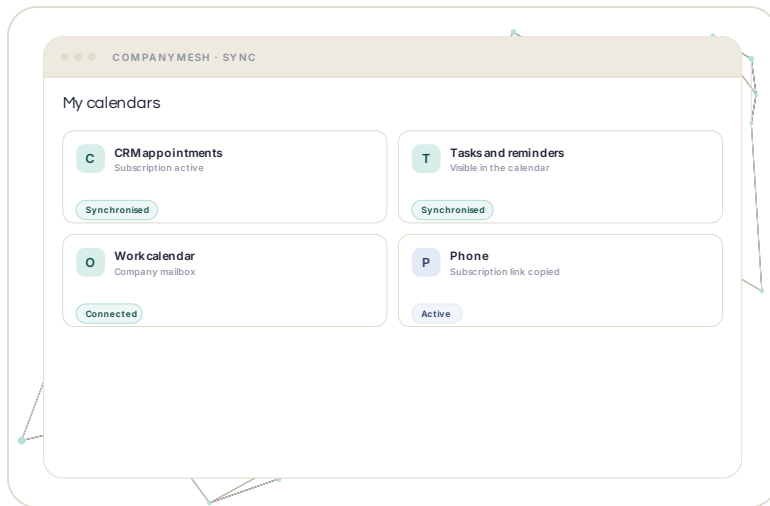
**Fewer oversights, fewer missed appointments.**

Each booking triggers a confirmation, then reminders before the appointment. Customers can reschedule or cancel themselves, within the limits you set.



#### What it enables

- Confirmation and reminder emails
- Optional SMS reminders
- Self-service rescheduling and cancellation
- Video link included automatically



## 5 Sync with your calendars

### One calendar, wherever you are.

Appointments show up in your phone or email calendar through a calendar subscription. CRM tasks and reminders appear there too.

#### What it enables

- Calendar subscription (ICS)
- Tasks and reminders visible in the calendar
- Works on phone and computer
- Optional two-way sync

TAILORED

# Adapted to your business

Durations, appointment types, notice periods, travel areas, blocked days, rooms and office addresses: the calendar follows **your** organisation. The booking page uses your visual identity.

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## This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

### A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

### The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

### Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

## CONNECTORS

# Available integrations

Compatible with the tools you already use:

### Calendars

Google Calendar

Outlook / Microsoft 365

Apple Calendar (ICS)

### Video

Built-in CompanyMesh video

Microsoft Teams

Google Meet

Zoom

### Notifications

Email

SMS (Twilio, Vonage)

WhatsApp Business

Non-exhaustive list: other tools can be connected to suit your needs.

## Works with

`crm.leads` Prospecting & lead capture

`crm.contacts` Customers & contacts

`comms.visio` Sovereign video conferencing

`crm.portal` Client portal

`ops.projects` Projects & production

## Let's talk about your future tool

Tailored demo, by appointment.

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