Doodle

End User Guide

September 2022

What is in this document?

The Doodle End User Guide provides step-by-step instructions for setting up your Doodle profile via the Account Settings and how to use all Doodle scheduling features so that you can begin scheduling meetings using Doodle today.

If you have any questions about how to use the product beyond what is featured in this guide, recommendations for how to get the most out of Doodle for your use case, or need technical assistance, please refer to the links below.

Technical Assistance

Premium Support Email

Knowledge Base

Doodle Help Center

Additional Resources

Master your meetings page

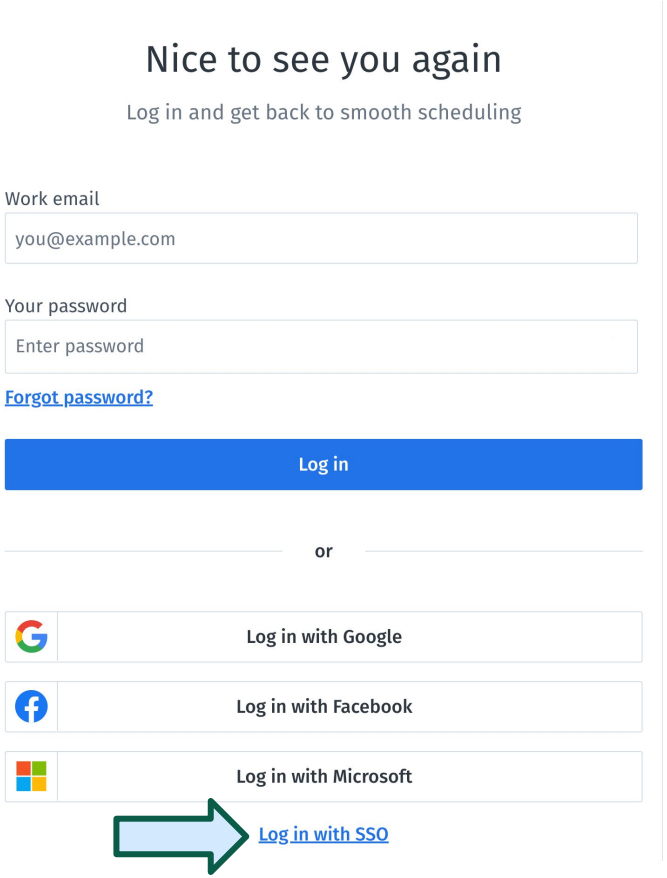
Premium Support Email

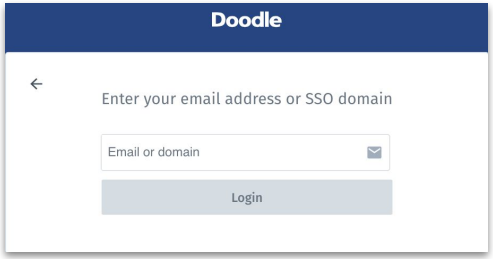
Logging In With SSO

Click the **Continue with SSO** button and use your **USC Viterbi** credentials on the following page.

Here is a quick link to access the SSO domain page:

https://doodle.com/login/sso





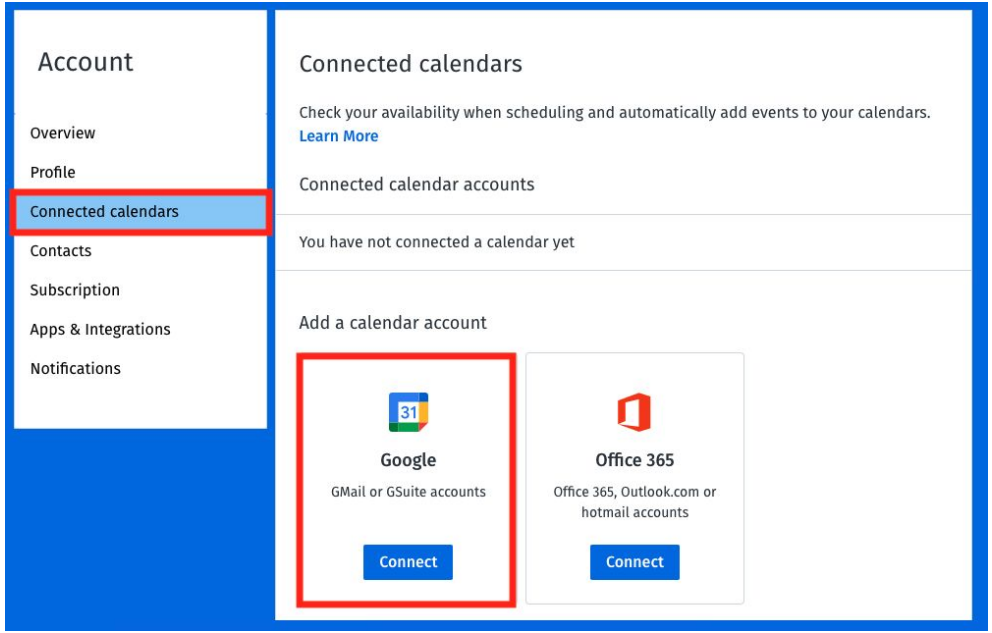
Connecting Your Calendar

Connect your Google Calendar:

Click on your name and go to **Account Settings > Calendars** to connect your Google calendar to Doodle.

Connecting your calendar allows **calendar invites to automatically be created** once a time is selected & allows your clients to **pick the best times** based on your availability settings in Booking Page.

***Keep in mind:** Doodle **does not** allow **external** parties (ex: your clients) to see what's on your calendar.*



💡 **Pro tip:** *once you've connected your Google Calendar, any meeting that is booked via Doodle will automatically have a **Google Meet** link added to the calendar invite. No need to manually add it!*

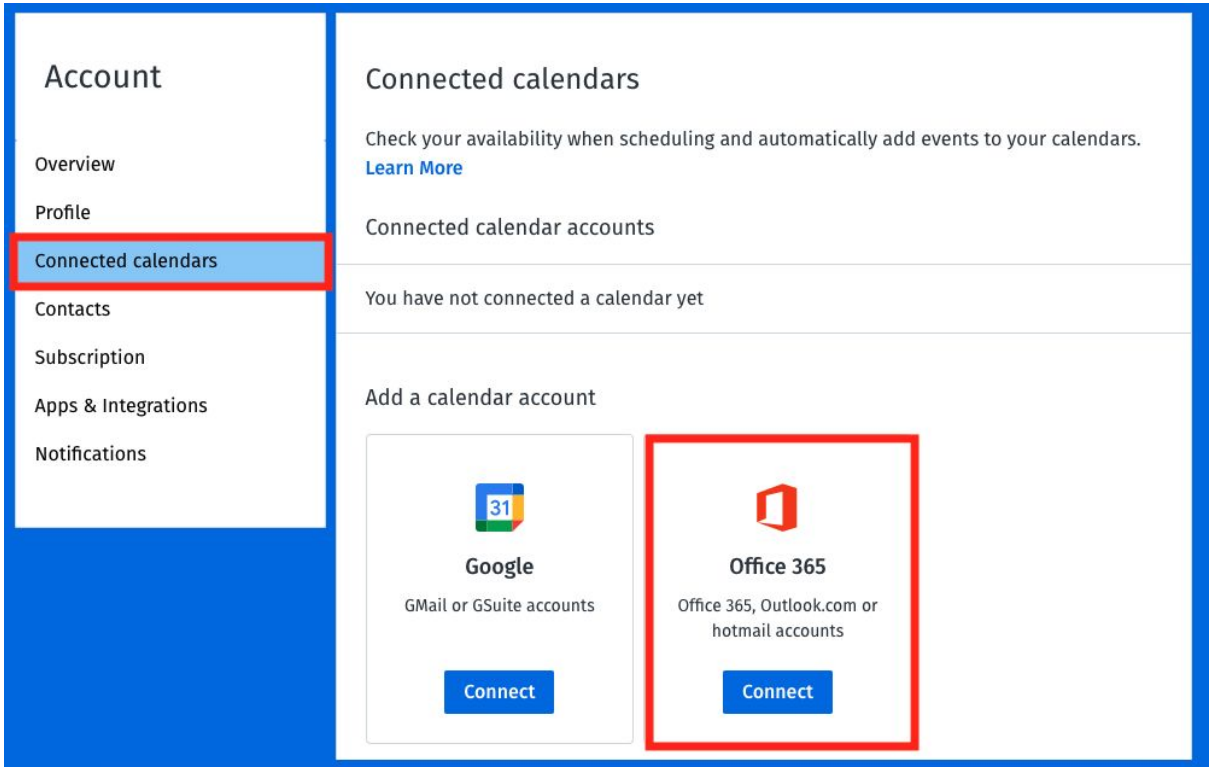
Connecting Your Calendar

Connect your Outlook Calendar:

Click on your name and go to **Account Settings > Calendars** to connect your Outlook calendar to Doodle.

Connecting your calendar allows **calendar invites to automatically be created** once a time is selected & allows your clients to **pick the best times** based on your availability settings in Booking Page.

***Keep in mind:** Doodle* **does not** *allow **external** parties (ex: your clients) to see what's on your calendar.*

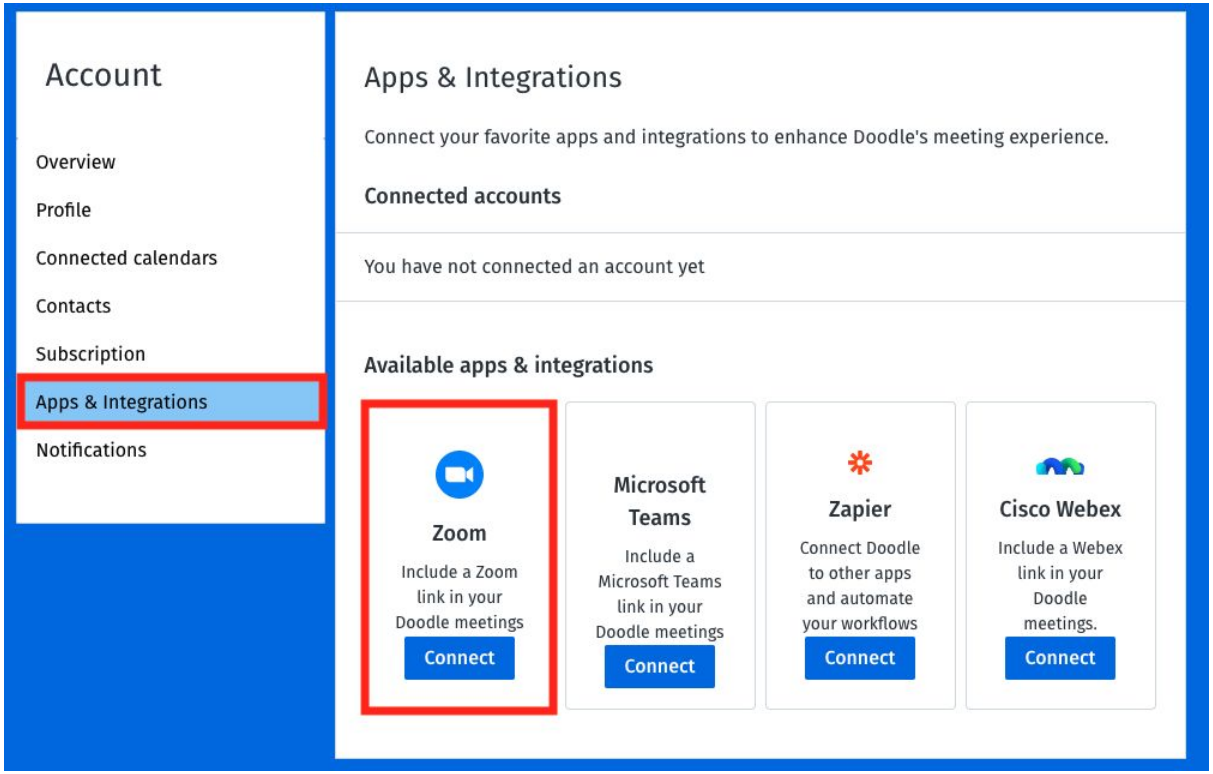


Connecting Your Conferencing Tool

Connect your Zoom Account:

Click on your name and go to **Account Settings > Apps & Integrations** to connect your Zoom account to Doodle.

Connecting Zoom results in having a unique Zoom **meeting link added to all meetings that are booked** via Doodle.

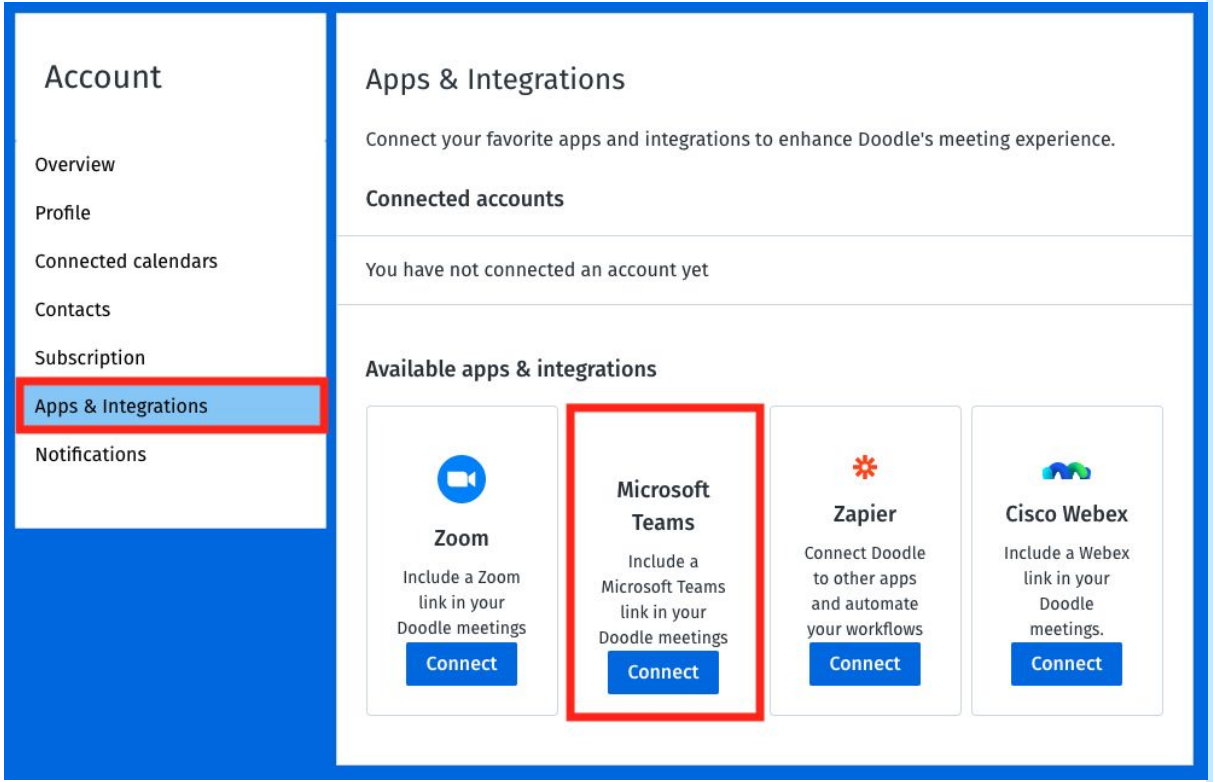


Connecting Your Conferencing Tool

Connect your Microsoft Teams:

Click on your name and go to **Account Settings > Apps & Integrations** to connect your Microsoft Teams to Doodle.

Connecting Microsoft Teams results in having a unique MS Teams **meeting link added to all meetings that are booked** via Doodle.

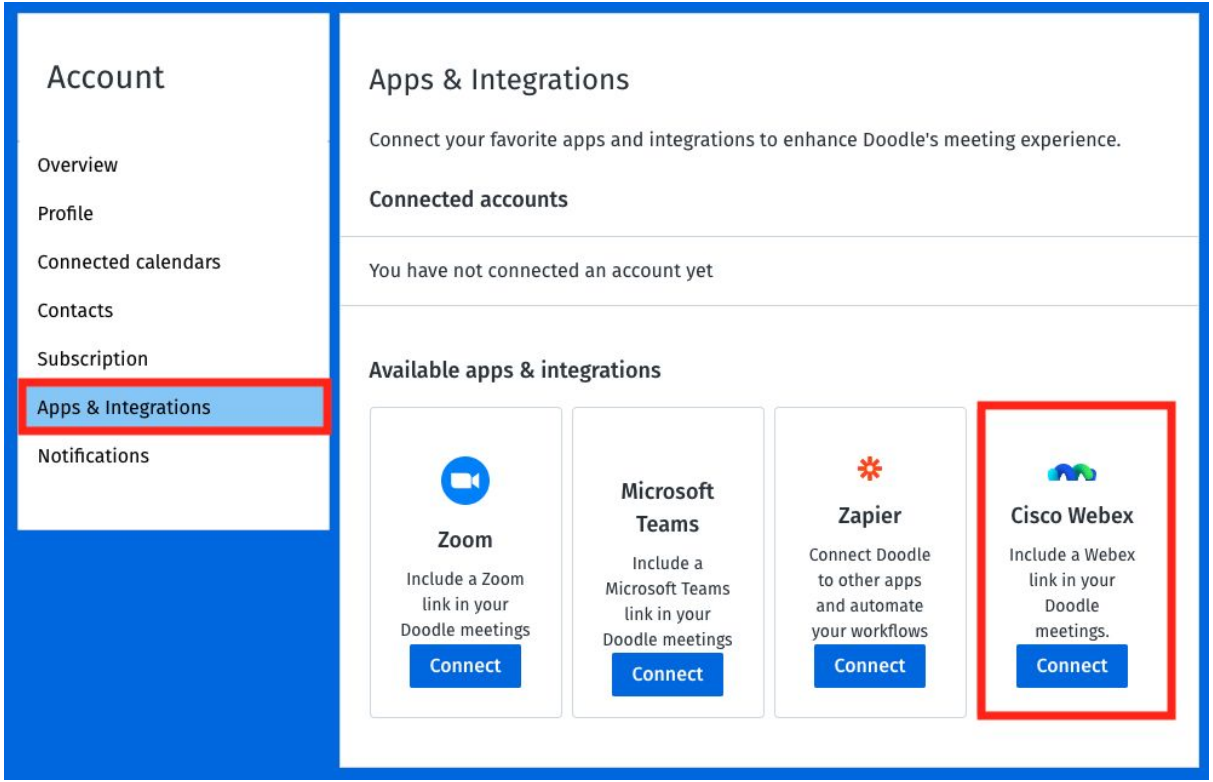


Connecting Your Conferencing Tool

Connect your Webex:

Click on your name and go to **Account Settings > Apps & Integrations** to connect your Webex to Doodle.

Connecting Webex results in having a unique Webex **meeting link added to all meetings that are booked** via Doodle.

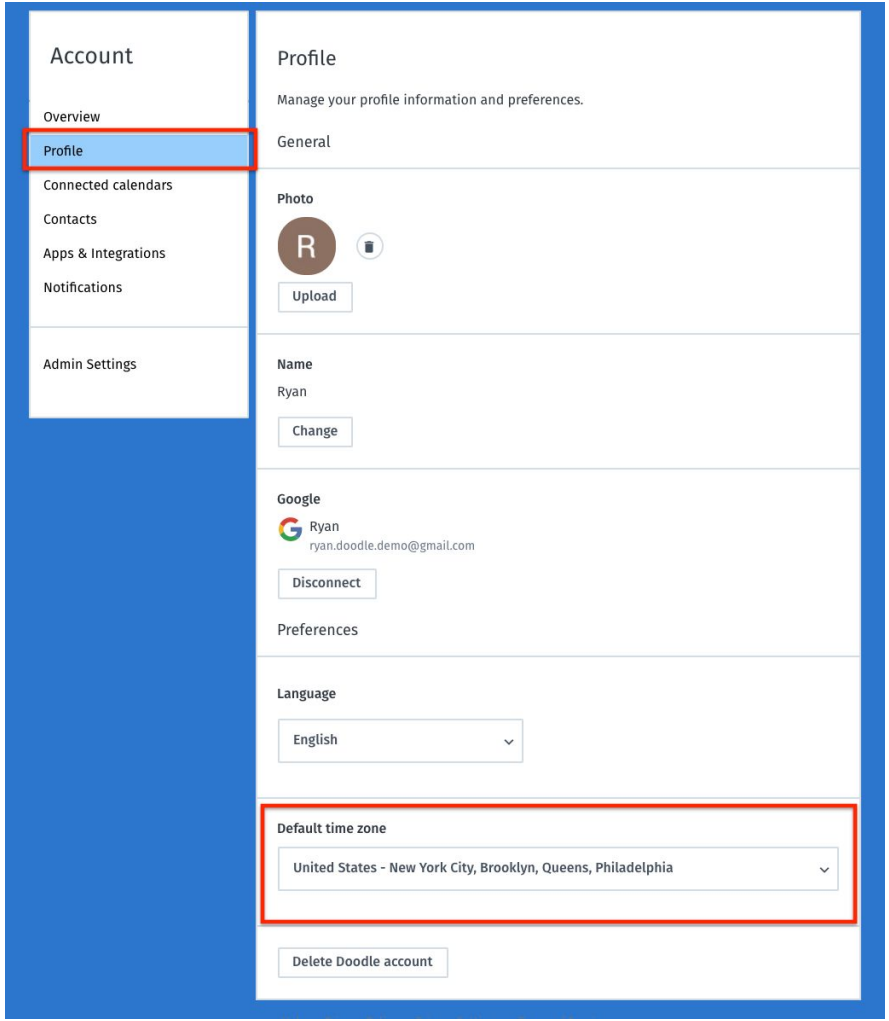


Time Zone Set Up

When setting up your **Profile** make sure that your **Default Time zone** is correct.

If you need to change this, use the drop down menu to find your time zone.

Note that when clients book meetings with you, they will see the options in ***their local time*** *zone.*



Meeting Types

Booking Page

Send a universal link that shows your pre-configured availability and allows anyone to book a meeting with you – we call it BP for short!

*Fastest way for **clients** to book with you during availability parameters you've set. Save time and positively impact your bottom line.*

Booking Page Set Up

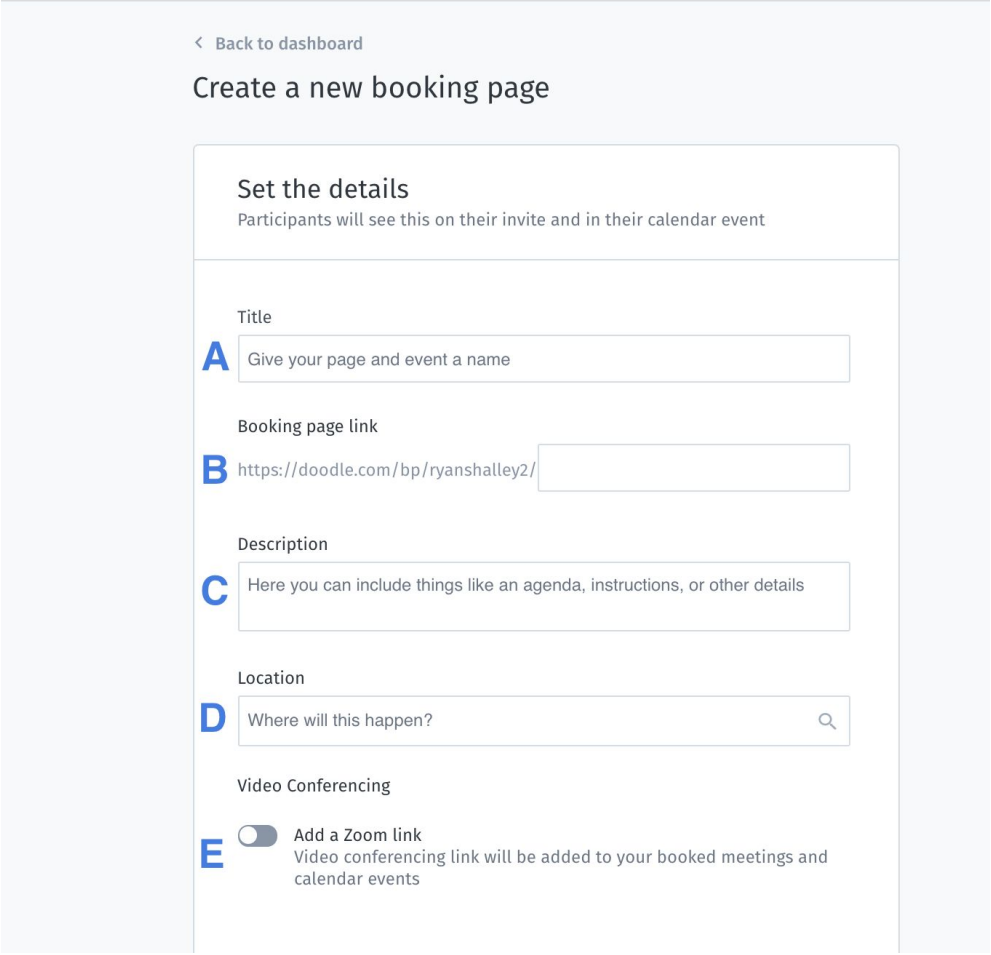
A: Customize the **title** of your BP to **reflect the type of meeting.** This will be the **title of the calendar invite** that is generated when a meeting is booked.

B: **Customize the URL** associated with this BP to be reflective of your brand and/or the specific meeting.

C: Customize the description field to **let clients know the purpose of the meeting** or anything they should **be prepared** for.

D: Phone or meeting location details? **Enter them here.**

E: Enabled the **video conferencing tool** you want to be attached to meetings booked on this BP.

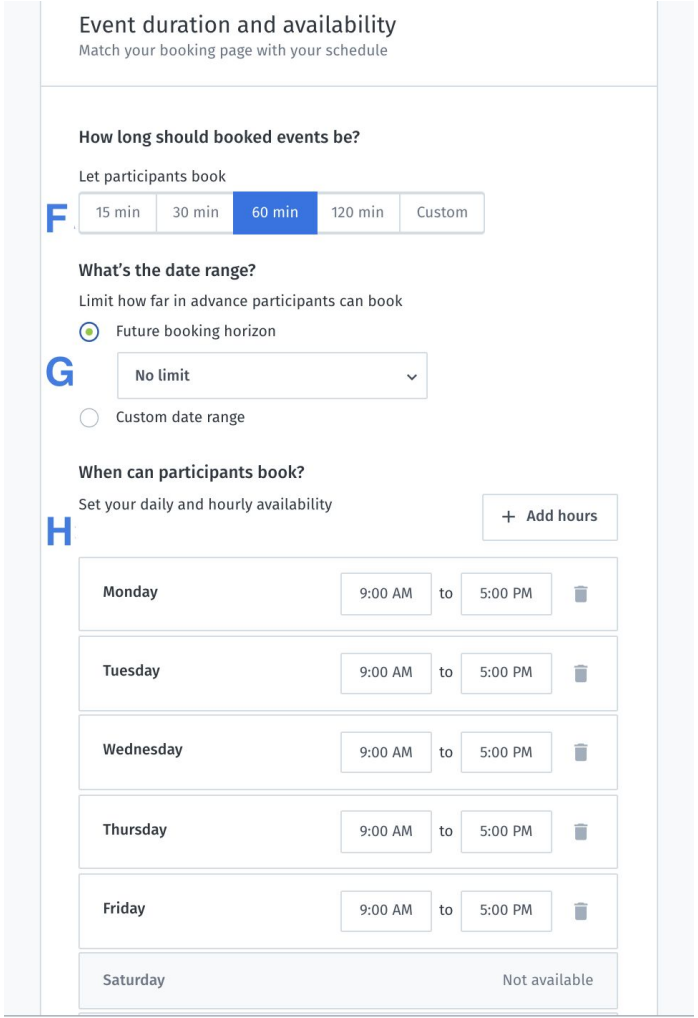


F: Customize the **time duration** for each meeting booked via this BP link.

G: Select **how far into the future** clients can book. You can make this a rolling availability into the future by setting a **Future Booking Horizon** or you can select a **Custom Date Range** to customize when clients can book on this BP.

H: Set up the times that **want to be available for bookings.** These are the time frames that Doodle will be reading your platform calendar and looking for availability to book meetings on your calendar.

💡 *If you prefer not to have morning meetings booked, change the parameters to only allow meetings from 11 am until 5 pm, and Doodle will never offer meeting times prior to 11 am on this BP.*



Power Settings

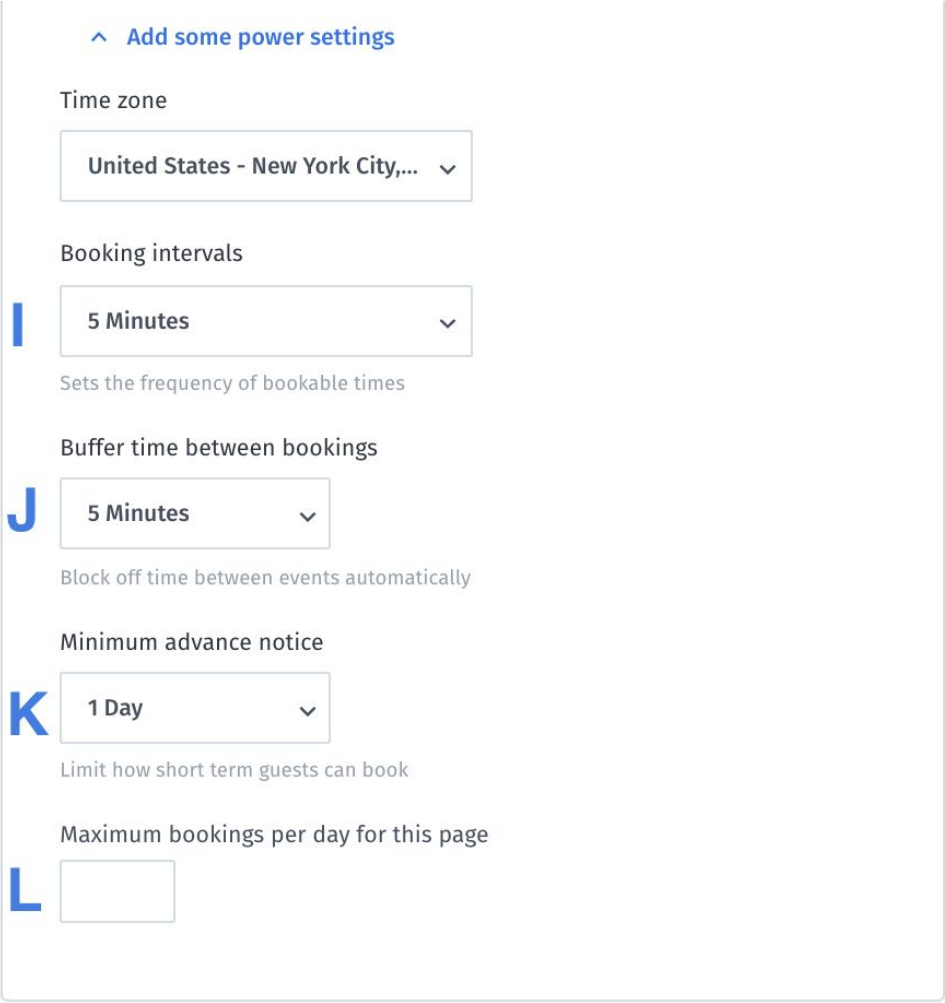
I: Customize the **frequency of bookable times** by enabling booking intervals.

💡 *If you have a 30 minute meeting with 5 minute intervals setup, then meetings are able to start at 9:05, 9:10, 9:15 etc. Doodle will still ensure that you are available for the full 30 minutes, but this way your clients have more options.*

J: **Buffer time** blocks time between meetings, to **avoid back to back meetings being booked**.

K: **Avoid last minute meetings** with a minimum notice.

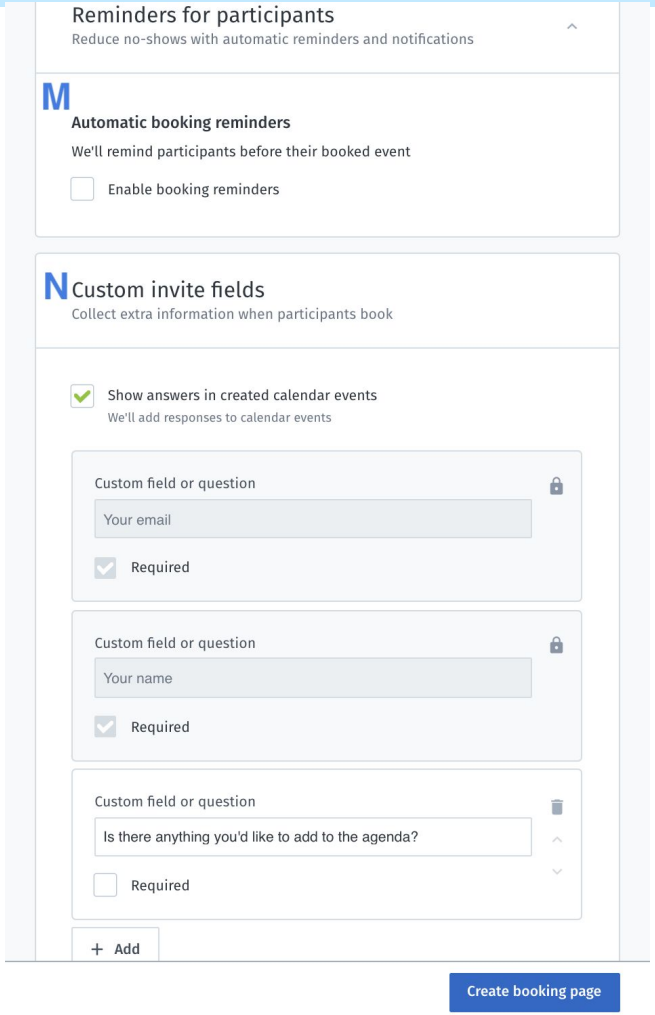
L: **Control how many meetings** you wish to have booked on your BP each day.



M: Set **automatic reminder emails** reminding clients that they have a meeting booked with you 24 hours prior to the meeting.

N: Need information before the meeting? **Create custom questions** for clients to answer prior to booking time with you.

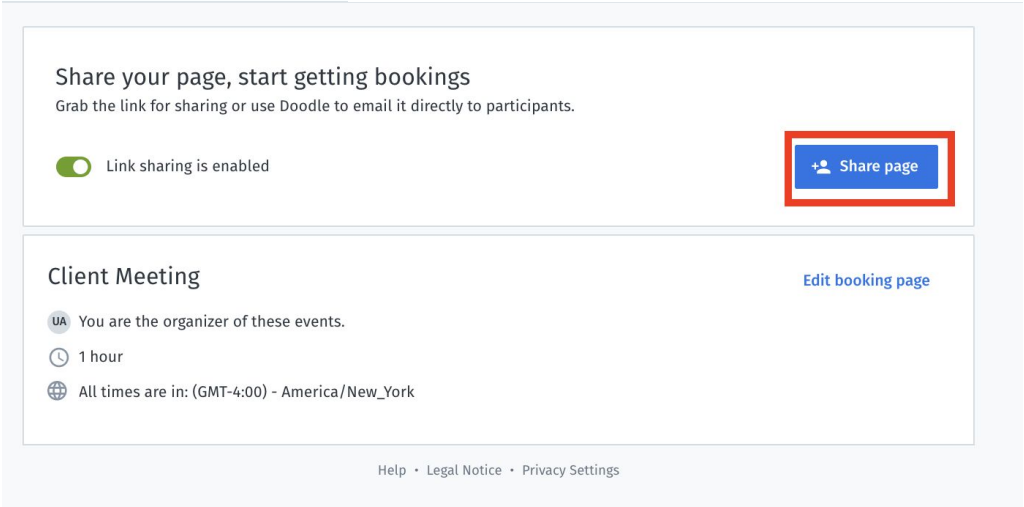
💡 *You can choose have the answers to the custom questions populate within the calendar invite or within the booking confirmation email.*

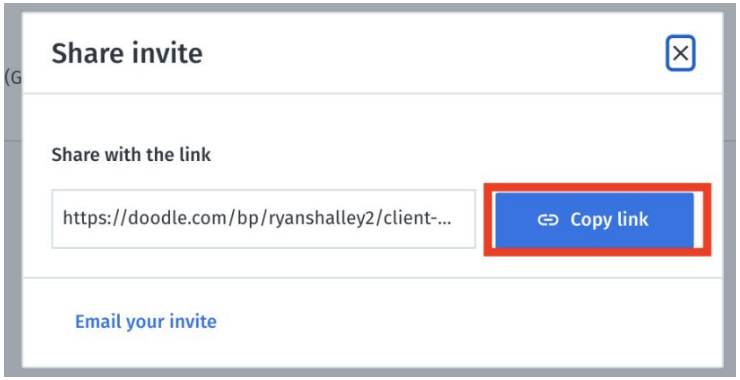


Select the **Share Page** option to generate a link to easily share with your clients in order for them to start booking meetings with you.

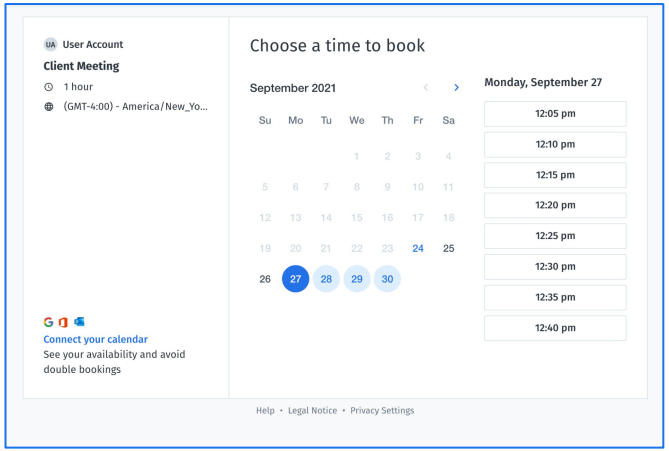
Best practice is that you share your BP links via your platform email. This way, clients quickly know who the meeting request is coming from and what it relates to.

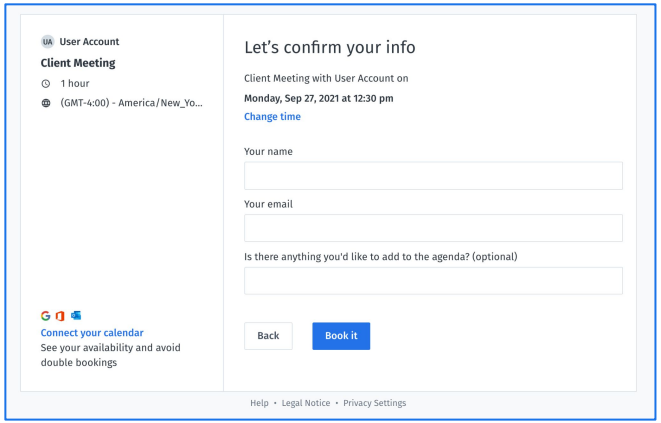
💡 *You are able to quickly grab your Booking Page links on your Doodle dashboard for future use.*

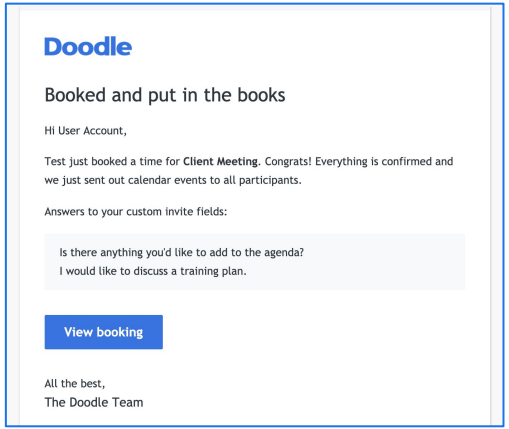




This is a **preview** of what the clients will see when booking a meeting, **select a time** and provide their information for the meeting







💡 **Pro tip:** *clients needs to reschedule? No problem. Within the calendar invite, there is a reschedule link that make rescheduling a breeze*

clients will receive **confirmation** once a time is booked + a **calendar invite will automatically** be created for you & them

1:1 Meetings

Enable anyone to book 1:1 meetings based on the availability you provide.

Great for client visits, ad-hoc 1:1 meetings, or any 1:1 meeting where you wish to have control over specific dates/times versus a rolling availability on BP

A: Customize the **title** of your 1:1 Meeting to **reflect the purpose of the meeting.**

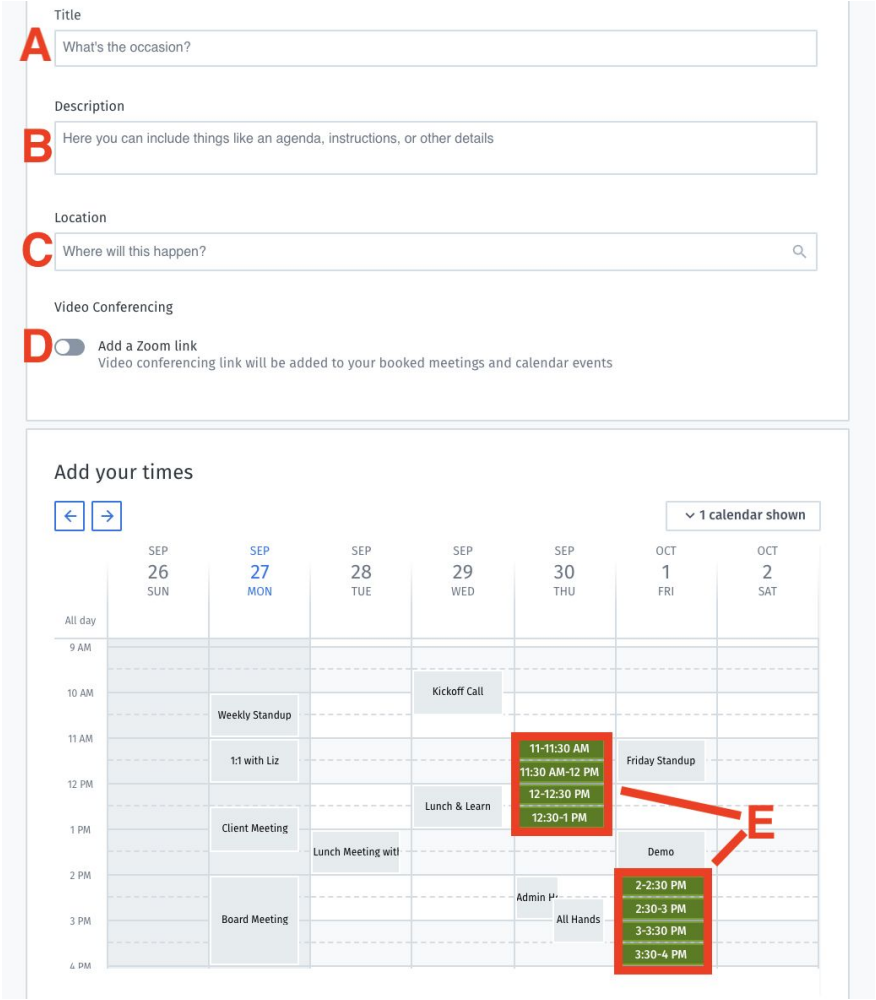
B: Customize the description field to **let your clients know the purpose of the meeting** or anything they should **be prepared** for.

C: Add **location or information on location**.

D: Enabled the **video conferencing tool** you want to be attached these 1:1 Meetings.

E: Customize the **time duration** & select the **meeting time options** you would like to present to your clients.

💡 *These grey boxes you are seeing are the meetings on your **connected** calendar. This allows you to easily see when you're available if you need to cross-reference existing meetings.*



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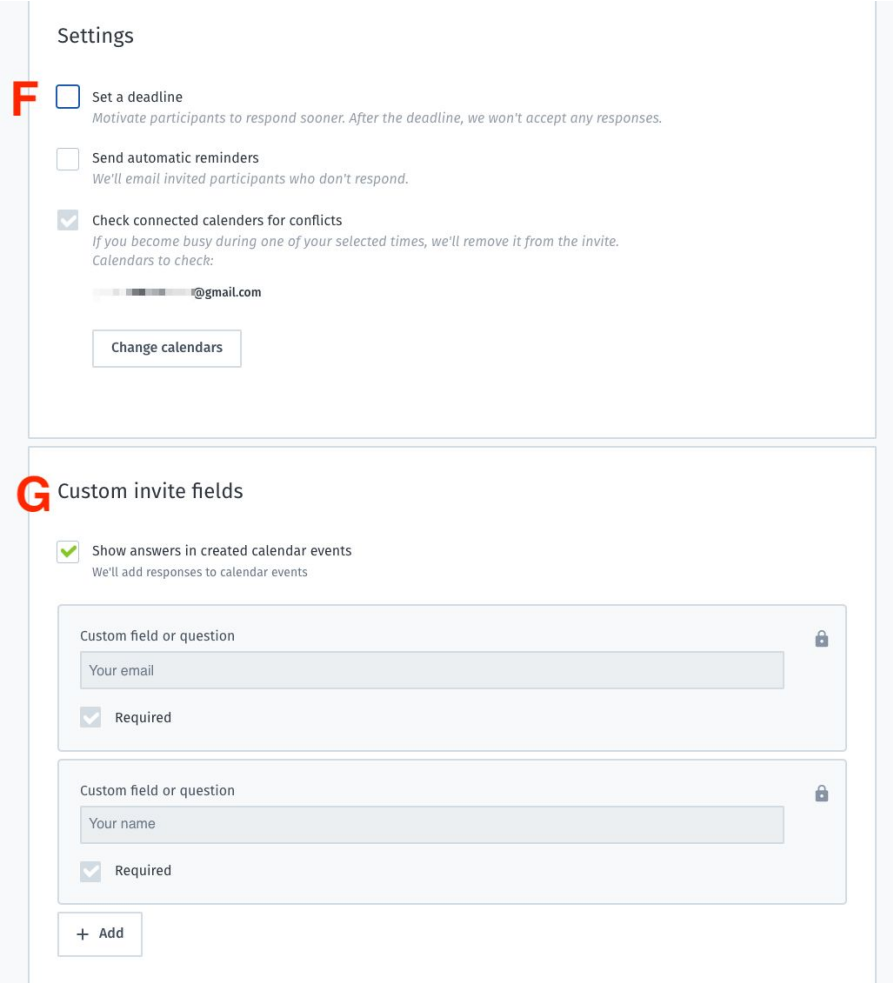
F: Set a **deadline** for all clients to book by choosing a time(s) that works best for them.

G: Need information before the meeting? **Create custom questions** for clients to answer prior to booking time with you.

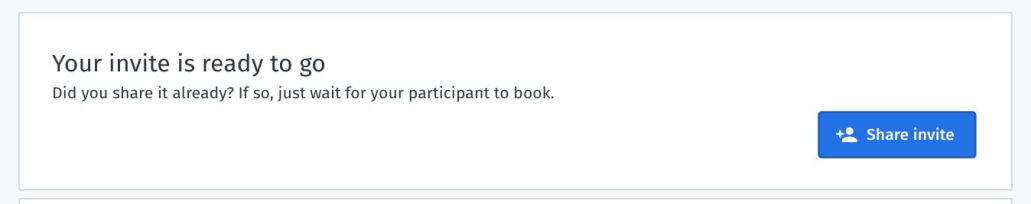
> 💡 **Pro tip:** *you can offer different time durations to allow your clients to select their preferred time is applicable.*
>
> *Link can be shared with multiple clients and time slots will disappear as clients book – similar to a signup sheet – no double-bookings & streamlined scheduling!*

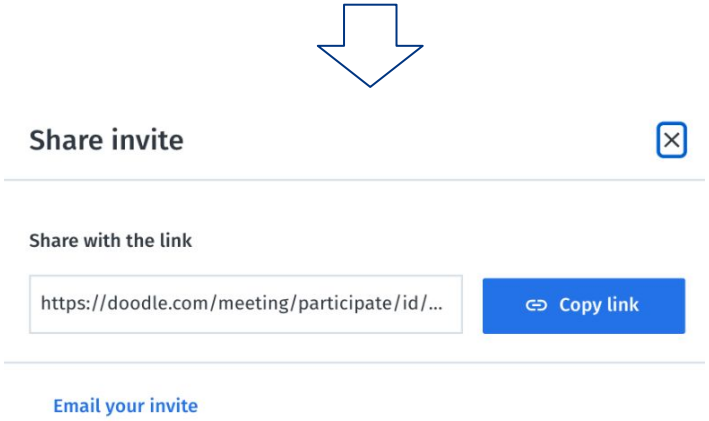


In order to **share the invite**, select the **Share Invite** button and then select **Copy Link** within the pop up window. You can share this link with your clients directly so they can book a meeting with you.

Best practice is that you share your 1:1 Meeting links via your platform email. This way, clients quickly know who the meeting request is coming from and what it relates to.

Once your clients book a meeting they will receive confirmation and a calendar invite will automatically be created for you & them.





Group Polls

Need to meet with multiple parties but running into varying availabilities? Poll your team to find a suitable time, then send them all the same calendar link.

Great for meetings that involve 2+ participants, internally and/or externally

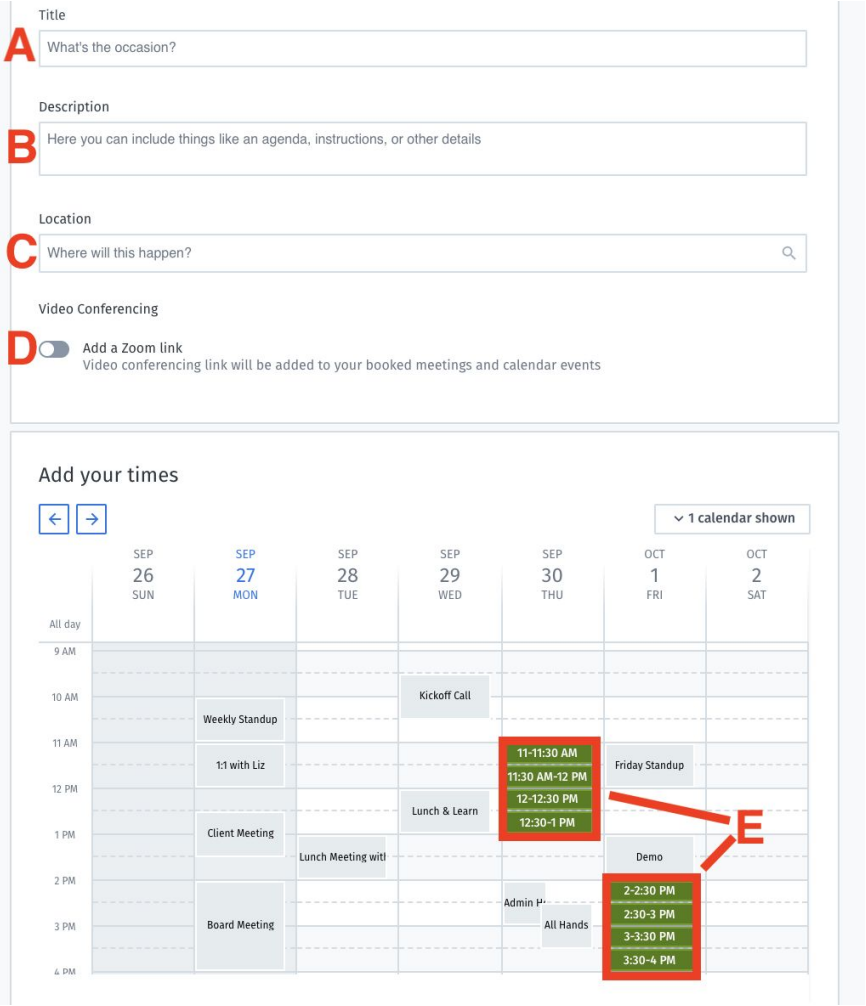
A: Customize the **title** of your Group Poll to **reflect the purpose of the meeting**

B: Customize the description field to **let your clients know the purpose of the meeting** or anything they should **be prepared** for

C: Add **location or information on location**

D: Enabled the **video conferencing tool** you want to be attached the calendar invite we will create when we close this Group Poll

E: Customize the **time duration** & select the **meeting time options** you would like to present to your clients to vote on



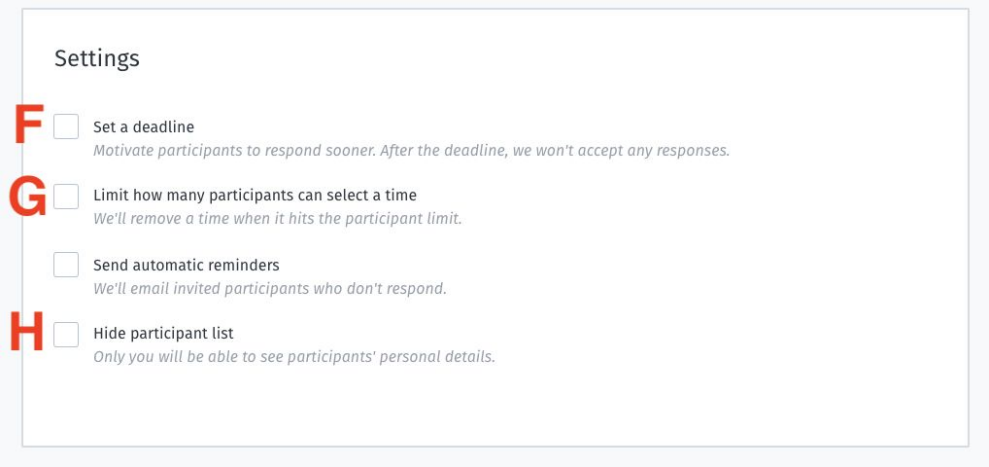
💡 **Pro tip:** *you can offer different time durations to allow the clients to select their preferred time if applicable.*

💡 **Pro tip:** *Want to select an entire day? No problem. Simply click under the date, in the All day section*

F: Set a **deadline** for all clients to participate by choosing a time(s) that works best for them.

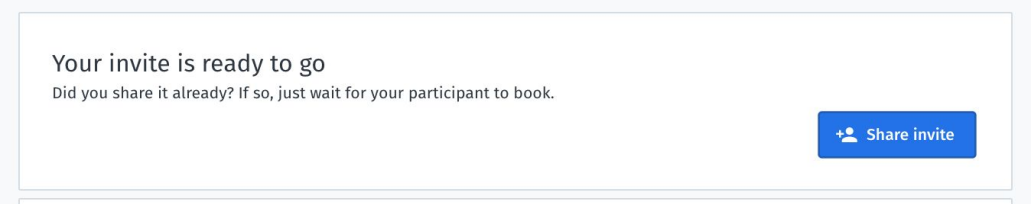
G: Want to **limit attendance**? You are able to choose how many participants you want to vote for each option. This turns the poll into a **sign up sheet**

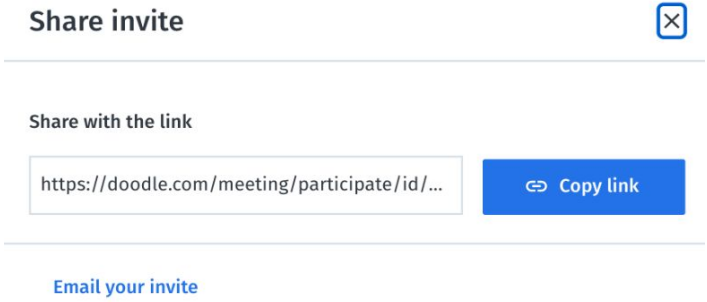
H: Hide participants' information from each other – this applies to **all participants** and cannot be customized for some.



In order to **share the invite**, select the **Share Invite** button and then select **Copy Link** within the pop up window. You can share this link with your clients directly so they can vote in your Poll.

Best practice is that you share your Group Poll links via your platform email. This way, clients quickly know who the request is coming from and what it relates to.



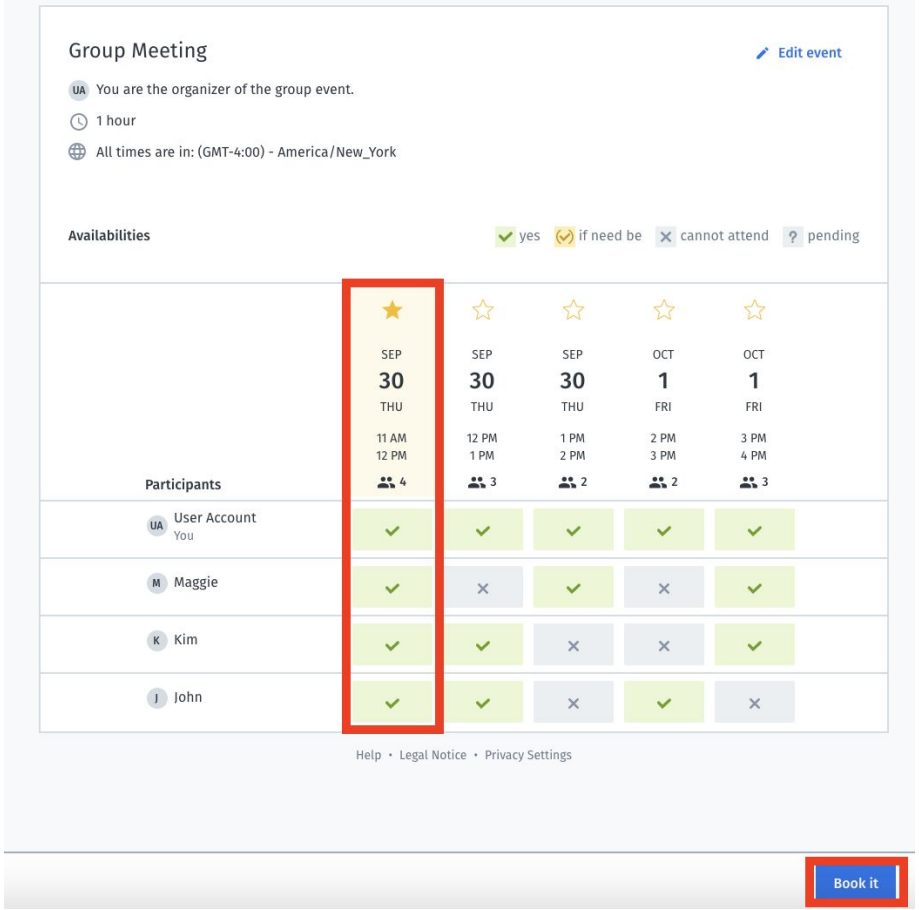


As your clients select time that work best for them, their responses will appear below your voted time option.

Once the **deadline has arrived** or all clients have selected their preferred times, Doodle will **automatically highlight the best time** for everyone in **yellow & with a star**. If you prefer a different time, move the star to the option you prefer.

Click **Book it** to send the calendar invite to all that participate in the poll so they have a Save the Date for the meeting.

Once the event is created, you can add/remove guests, send updates or cancel directly from platform.



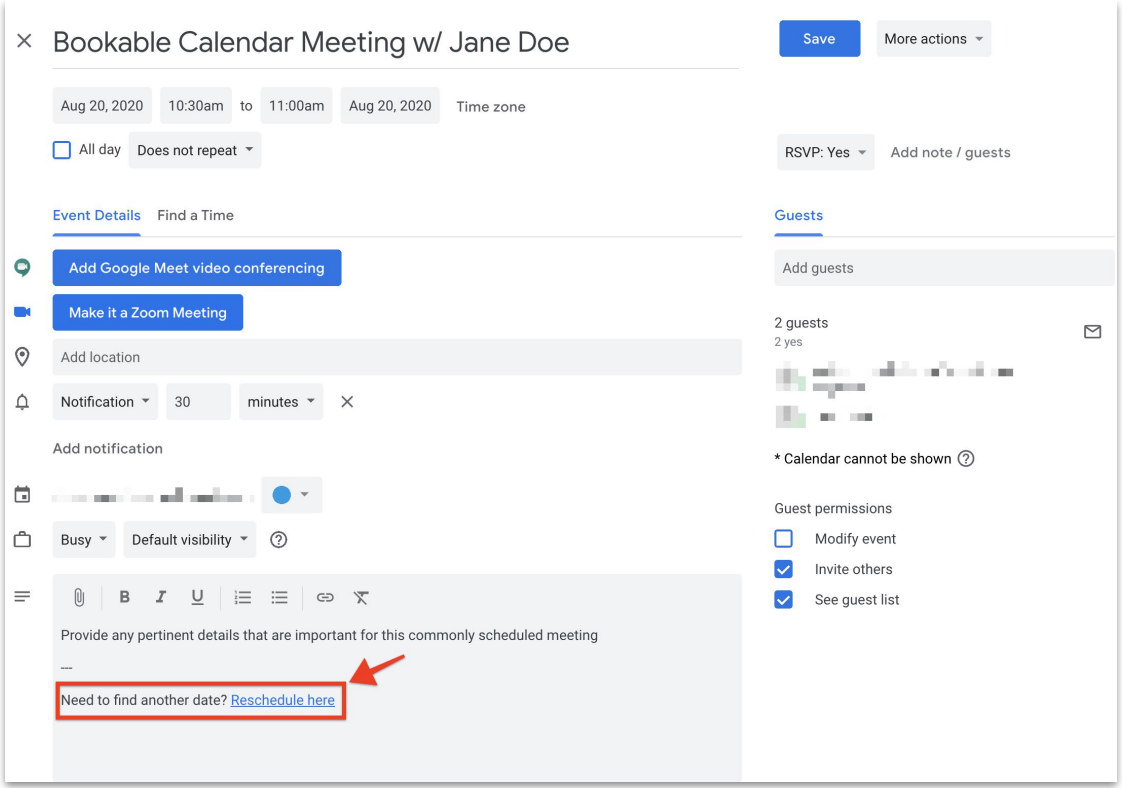
Best Practices

Best practice for sharing your meeting links & inviting your clients:

Hyperlink your link in an email with a direct **call to action**

Let your clients know scheduling via the link is to **keep it easy** for them

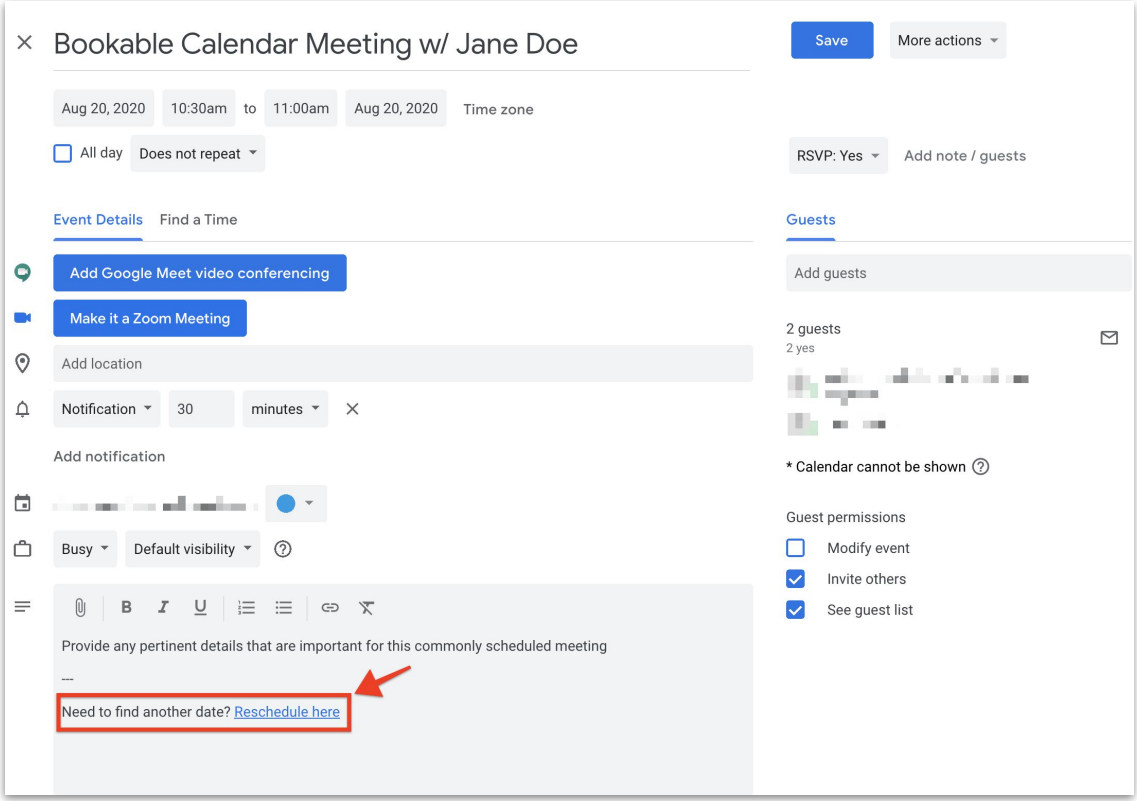
Any additional context around the meeting can be provided in the email to create **a sense of urgency** (if applicable) or **increase priority of meeting** for your client



Best practice for updating information for meetings:

clients can easily reschedule meetings booked via Booking Page directly from the Doodle **reschedule link** in the calendar invite.

If you need to update **location information**, **add additional participants,** or update the **description field**, you can do this **directly** from your **platform** calendar similar to all other meetings**.**



Questions?

help.doodle.com

premium-support@doodle.com

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