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

Doodle End User Guide

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

Nice to see you again

Log in and get back to smooth scheduling

Work email

you@example.com

Your password

Enter password

Forgot password?

Log in

or

Log in with Google

Log in with Facebook

Log in with Microsoft

Log in with SSO

Doodle

← Enter your email address or SSO domain

Email or domain

Login

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!*
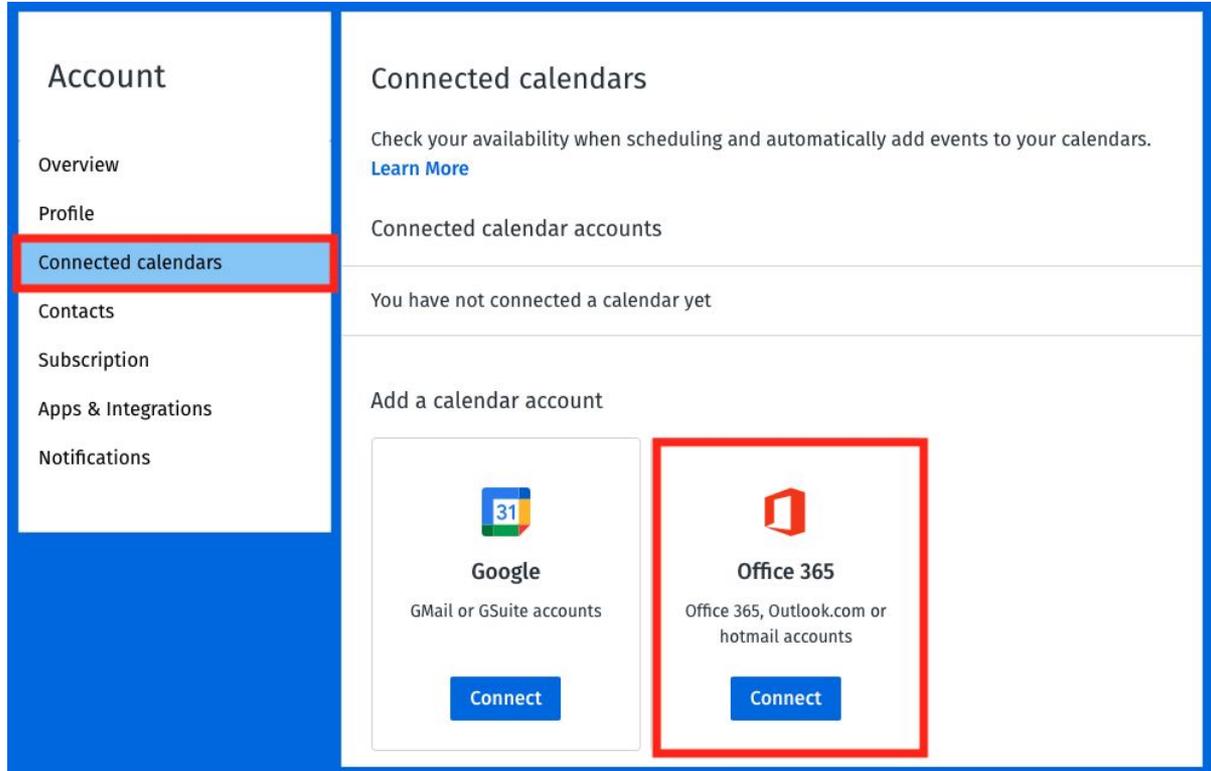
Connecting Your Calendar

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* <u>**does not**</u> *allow* ***external*** *parties (ex: your clients) to see what's on your calendar.*
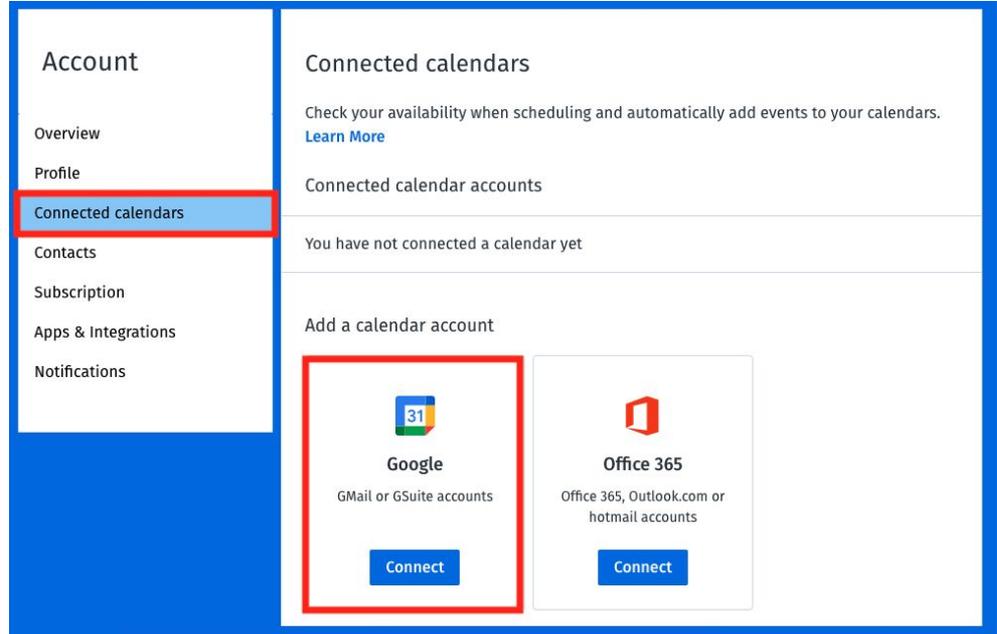
Account

Overview

Profile

Connected calendars

Contacts

Subscription

Apps & Integrations

Notifications

Connected calendars

Check your availability when scheduling and automatically add events to your calendars. **Learn More**

Connected calendar accounts

You have not connected a calendar yet

Add a calendar account

Google
GMail or GSuite accounts
Connect

Office 365
Office 365, Outlook.com or hotmail accounts
Connect

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.

Account

Overview

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Connected calendars

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Subscription

Apps & Integrations

Notifications

Apps & Integrations

Connect your favorite apps and integrations to enhance Doodle's meeting experience.

Connected accounts

You have not connected an account yet

Available apps & integrations

Zoom
Include a Zoom link in your Doodle meetings
Connect

Microsoft Teams
Include a Microsoft Teams link in your Doodle meetings
Connect

Zapier
Connect Doodle to other apps and automate your workflows
Connect

Cisco Webex
Include a Webex link in your Doodle meetings.
Connect

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.

Account

- Overview
- Profile
- Connected calendars
- Contacts
- Subscription
- **Apps & Integrations**
- Notifications

Apps & Integrations

Connect your favorite apps and integrations to enhance Doodle's meeting experience.

Connected accounts

You have not connected an account yet

Available apps & integrations

Zoom
Include a Zoom link in your Doodle meetings

Connect

Microsoft Teams
Include a Microsoft Teams link in your Doodle meetings

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Zapier
Connect Doodle to other apps and automate your workflows

Connect

Cisco Webex
Include a Webex link in your Doodle meetings.

Connect

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.*
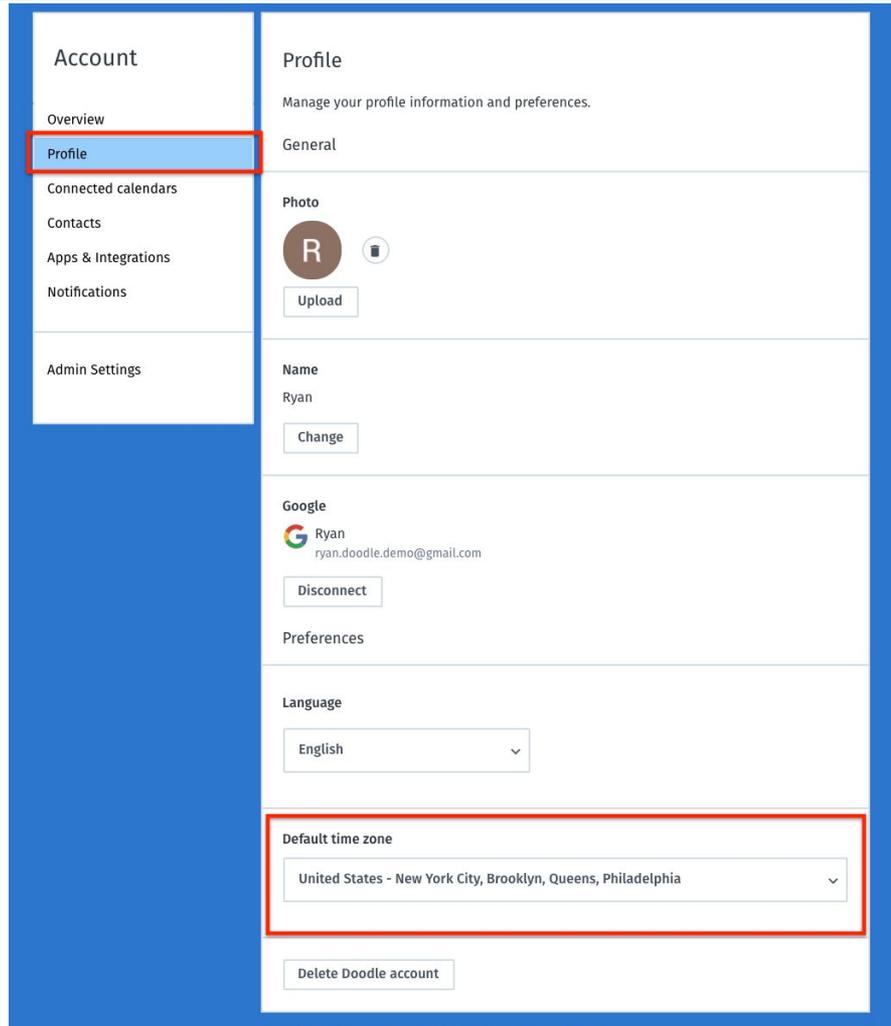
Account

Overview
Profile
Connected calendars
Contacts
Apps & Integrations
Notifications

Admin Settings

Profile

Manage your profile information and preferences.

General

Photo

R

Upload

Name

Ryan

Change

Google

Ryan
ryan.doodle.demo@gmail.com

Disconnect

Preferences

Language

English

Default time zone

United States - New York City, Brooklyn, Queens, Philadelphia

Delete Doodle account

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.

‹ **Back to dashboard**

Create a new booking page

Set the details
Participants will see this on their invite and in their calendar event

Title

A Give your page and event a name

Booking page link

B https://doodle.com/bp/ryanshalley2/

Description

C Here you can include things like an agenda, instructions, or other details

Location

D Where will this happen?

Video Conferencing

E Add a Zoom link
Video conferencing link will be added to your booked meetings and calendar events

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.*

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Event duration and availability
Match your booking page with your schedule

How long should booked events be?

Let participants book

F | 15 min | 30 min | 60 min | 120 min | Custom |

What's the date range?

Limit how far in advance participants can book

◉ Future booking horizon

G No limit ⌄

○ Custom date range

When can participants book?

Set your daily and hourly availability

H ＋ Add hours

Monday	9:00 AM	to	5:00 PM	🗑
Tuesday	9:00 AM	to	5:00 PM	🗑
Wednesday	9:00 AM	to	5:00 PM	🗑
Thursday	9:00 AM	to	5:00 PM	🗑
Friday	9:00 AM	to	5:00 PM	🗑
Saturday			Not available	

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.

⌃ **Add some power settings**

Time zone

United States - New York City,... ⌄

Booking intervals

I
5 Minutes ⌄

Sets the frequency of bookable times

Buffer time between bookings

J
5 Minutes ⌄

Block off time between events automatically

Minimum advance notice

K
1 Day ⌄

Limit how short term guests can book

Maximum bookings per day for this page

L

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.*
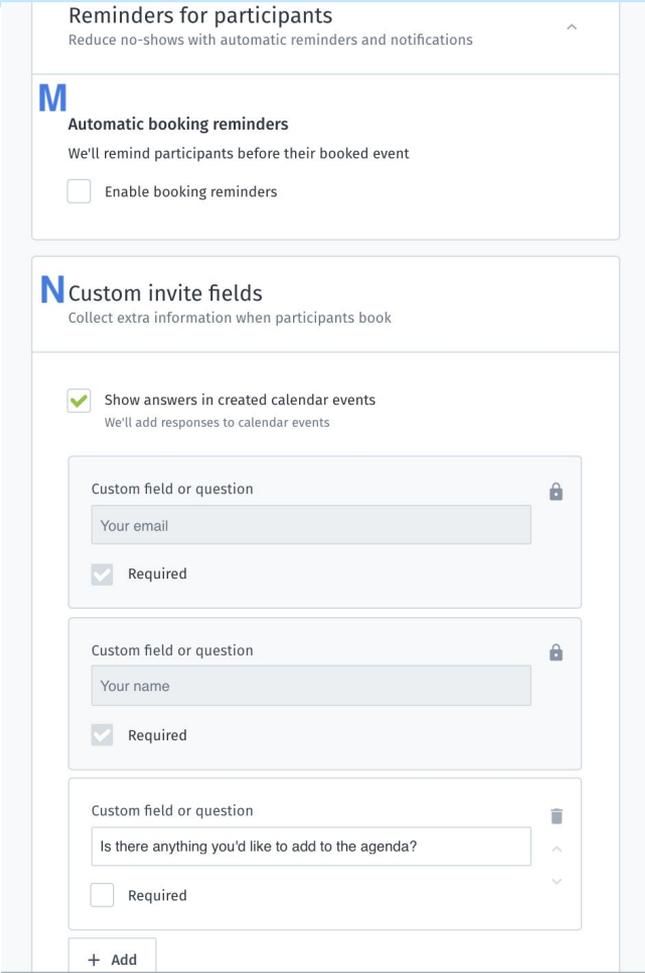
Reminders for participants
Reduce no-shows with automatic reminders and notifications

M
Automatic booking reminders
We'll remind participants before their booked event

☐ Enable booking reminders

N Custom invite fields
Collect extra information when participants book

☑ Show answers in created calendar events
We'll add responses to calendar events

Custom field or question 🔒
Your email
☑ Required

Custom field or question 🔒
Your name
☑ Required

Custom field or question 🗑
Is there anything you'd like to add to the agenda?
☐ Required

+ Add

Create booking page

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.*
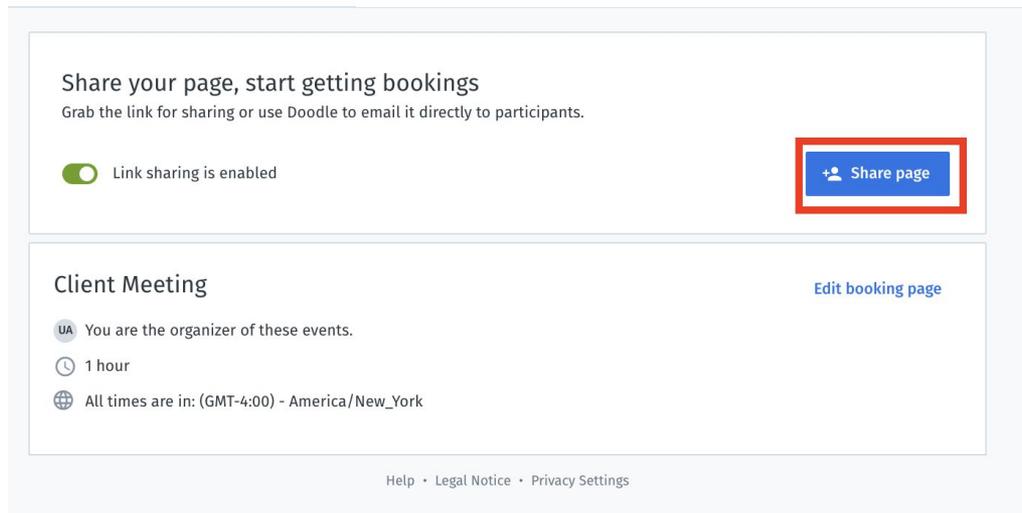
Share your page, start getting bookings
Grab the link for sharing or use Doodle to email it directly to participants.

Link sharing is enabled

+ Share page

Client Meeting   Edit booking page

UA You are the organizer of these events.

🕐 1 hour

🌐 All times are in: (GMT-4:00) - America/New_York

Help • Legal Notice • Privacy Settings

Share invite

Share with the link

https://doodle.com/bp/ryanshalley2/client-...   🔗 Copy link
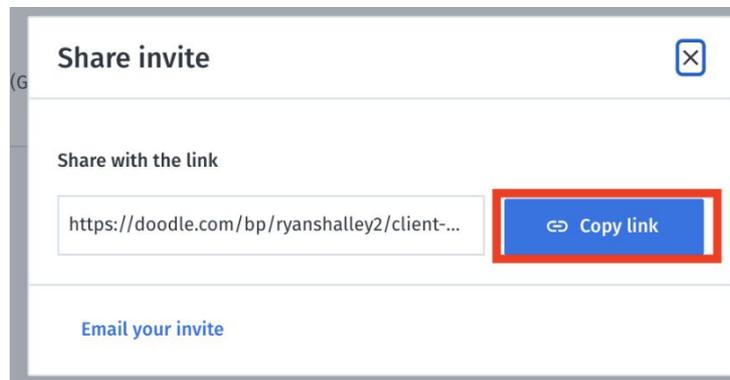
Email your invite

Doodle End User Guide

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

Choose a time to book

UA User Account

Client Meeting

🕐 1 hour

🌐 (GMT-4:00) - America/New_Yo...

September 2021 ‹ ›

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Monday, September 27

| 12:05 pm |
| 12:10 pm |
| 12:15 pm |
| 12:20 pm |
| 12:25 pm |
| 12:30 pm |
| 12:35 pm |
| 12:40 pm |

Connect your calendar
See your availability and avoid double bookings

Help • Legal Notice • Privacy Settings

Let's confirm your info

UA User Account

Client Meeting

🕐 1 hour

🌐 (GMT-4:00) - America/New_Yo...

Client Meeting with User Account on

Monday, Sep 27, 2021 at 12:30 pm

Change time

Your name

Your email

Is there anything you'd like to add to the agenda? (optional)

Connect your calendar
See your availability and avoid double bookings

Back   Book it

Help • Legal Notice • Privacy Settings

💡 **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

Doodle

Booked and put in the books

Hi User Account,

Test just booked a time for **Client Meeting**. Congrats! Everything is confirmed and we just sent out calendar events to all participants.

Answers to your custom invite fields:

Is there anything you'd like to add to the agenda?
I would like to discuss a training plan.

View booking

All the best,
The Doodle Team

Doodle End User Guide

🔲 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!

Settings

F ☐ Set a deadline
Motivate participants to respond sooner. After the deadline, we won't accept any responses.

☐ Send automatic reminders
We'll email invited participants who don't respond.

☑ Check connected calenders for conflicts
If you become busy during one of your selected times, we'll remove it from the invite.
Calendars to check:
▓▓▓▓▓▓▓@gmail.com

Change calendars

G Custom invite fields

☑ Show answers in created calendar events
We'll add responses to calendar events

Custom field or question   🔒
Your email

☑ Required

Custom field or question   🔒
Your name

☑ Required

+ Add

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.
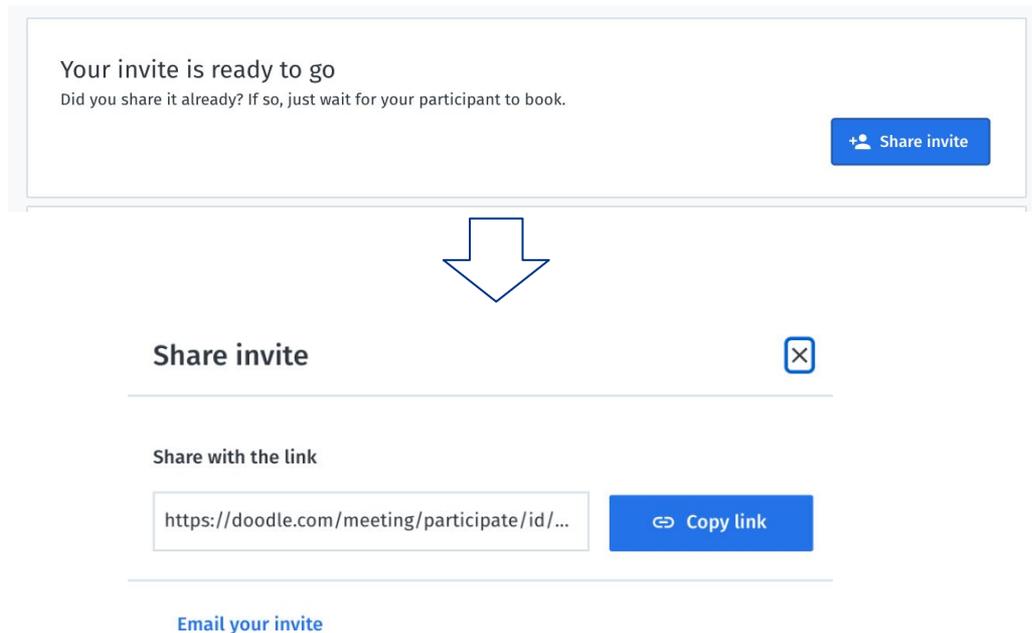
Your invite is ready to go
Did you share it already? If so, just wait for your participant to book.

+⚈ Share invite

Share invite ☒

Share with the link

https://doodle.com/meeting/participate/id/...   🔗 Copy link

Email your invite

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.*

Title
A What's the occasion?

Description
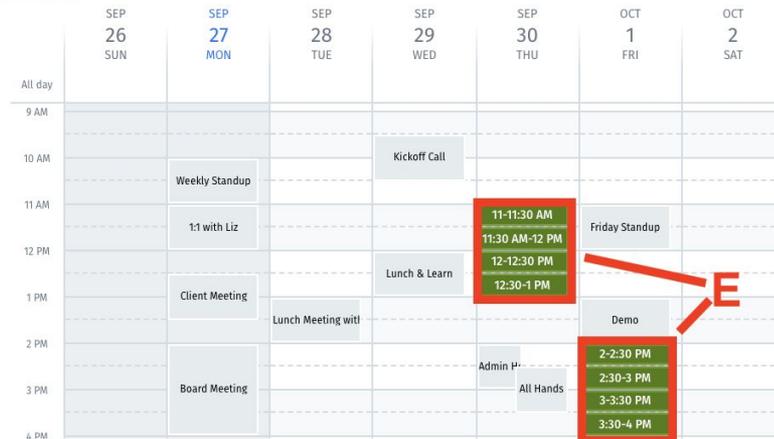**B** Here you can include things like an agenda, instructions, or other details

Location
C Where will this happen?

Video Conferencing
D ⬤ Add a Zoom link
Video conferencing link will be added to your booked meetings and calendar events

Add your times

← →   ⌄ 1 calendar shown

	SEP 26 SUN	SEP 27 MON	SEP 28 TUE	SEP 29 WED	SEP 30 THU	OCT 1 FRI	OCT 2 SAT
All day							
9 AM							
10 AM		Weekly Standup		Kickoff Call			
11 AM		1:1 with Liz			11-11:30 AM / 11:30 AM-12 PM	Friday Standup	
12 PM				Lunch & Learn	12-12:30 PM / 12:30-1 PM		
1 PM		Client Meeting	Lunch Meeting with			Demo	
2 PM					Admin H: / All Hands	2-2:30 PM / 2:30-3 PM	
3 PM		Board Meeting				3-3:30 PM / 3:30-4 PM	
4 PM							

E

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

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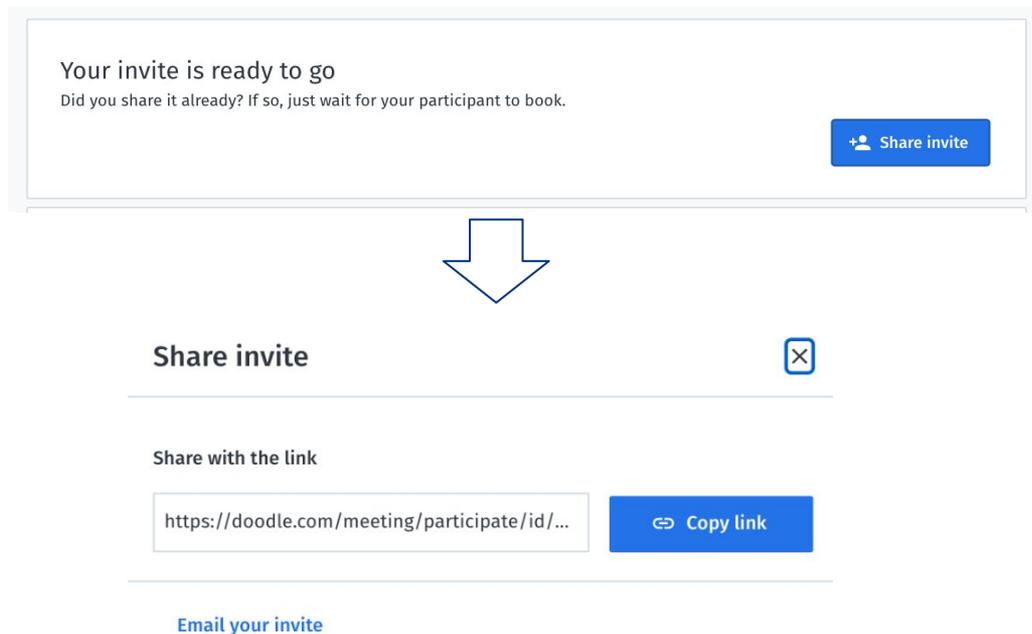
H: Hide participants' information from each other – this applies to **all participants** and cannot be customized for some.

Settings

F ☐ Set a deadline
Motivate participants to respond sooner. After the deadline, we won't accept any responses.

G ☐ Limit how many participants can select a time
We'll remove a time when it hits the participant limit.

☐ Send automatic reminders
We'll email invited participants who don't respond.

H ☐ Hide participant list
Only you will be able to see participants' personal details.

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.

Your invite is ready to go

Did you share it already? If so, just wait for your participant to book.

Share invite

Share invite

Share with the link

https://doodle.com/meeting/participate/id/...

Copy link

Email your invite

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.

Group Meeting

✏ Edit event

UA You are the organizer of the group event.

🕐 1 hour

🌐 All times are in: (GMT-4:00) - America/New_York

Availabilities   ✔ yes ✅ if need be ✕ cannot attend ? pending

Participants	★ SEP 30 THU 11 AM 12 PM 👥 4	☆ SEP 30 THU 12 PM 1 PM 👥 3	☆ SEP 30 THU 1 PM 2 PM 👥 2	☆ OCT 1 FRI 2 PM 3 PM 👥 2	☆ OCT 1 FRI 3 PM 4 PM 👥 3
UA User Account You	✔	✔	✔	✔	✔
M Maggie	✔	✕	✔	✕	✔
K Kim	✔	✔	✕	✕	✔
J John	✔	✔	✕	✔	✕

Help • Legal Notice • Privacy Settings

Book it

🟦 **Doodle** End User Guide

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

✕   **Bookable Calendar Meeting w/ Jane Doe**

Aug 20, 2020   10:30am   to   11:00am   Aug 20, 2020   Time zone

☐ All day   Does not repeat ▾

Event Details   Find a Time

Add Google Meet video conferencing

Make it a Zoom Meeting

Add location

🔔 Notification ▾   30   minutes ▾   ✕

Add notification

Busy ▾   Default visibility ▾ ?

B I U ≔ ≔ 🔗 ✕

Provide any pertinent details that are important for this commonly scheduled meeting

---

Need to find another date? Reschedule here

Save   More actions ▾

RSVP: Yes ▾   Add note / guests

Guests

Add guests

2 guests
2 yes

* Calendar cannot be shown ?

Guest permissions

☐ Modify event
☑ Invite others
☑ See guest list

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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**.**

× Bookable Calendar Meeting w/ Jane Doe

Save   More actions ▾

Aug 20, 2020   10:30am   to   11:00am   Aug 20, 2020   Time zone

☐ All day   Does not repeat ▾

RSVP: Yes ▾   Add note / guests

Event Details   Find a Time

Guests

Add Google Meet video conferencing

Make it a Zoom Meeting

Add location

Notification ▾   30   minutes ▾   ×

Add notification

Busy ▾   Default visibility ▾   ?

Add guests

2 guests
2 yes

* Calendar cannot be shown ?

Guest permissions

☐ Modify event
☑ Invite others
☑ See guest list

Provide any pertinent details that are important for this commonly scheduled meeting

---

Need to find another date? Reschedule here

Doodle End User Guide

Questions?

help.doodle.com

premium-support@doodle.com