



## **CALENDLY: SETTING UP YOUR ACCOUNT**

Your Calendly account will be embedded in your application form on your website so that applicants can automatically schedule an interview for themselves.

You can finish setting up your Calendly account in four easy steps:

1. Edit your account details.
2. Edit the Group Interview event created for you.
3. Connect your calendar.
4. Connect your video conferencing platform (Zoom recommended).

### **STEP 1: EDIT YOUR ACCOUNT DETAILS**

Log into your Calendly account using the username and password located in your BMH dashboard.

Go to the top right of your screen and click the dropdown, choose Profile and upload a photo, edit the messaging, and anything else you want to change. Make sure you hit Save Changes.

### **STEP 2: EDIT THE GROUP INTERVIEW EVENT**

BMH created a draft of a Group Interview event for you. You should review and edit this ASAP as candidates will be booking interviews on this event at the end of the application.

Click Edit on the event dropdown menu. Go to the Event Details section to change the duration, location (we recommend you choose Zoom), and edit the description (we have boilerplate language pre-loaded for you). Hit Save and close.

Next, go to Scheduling settings and change the days, times, how far out an applicant can schedule, and other sundry schedule-related items (like a buffer before or after each interview). You can arrange your office's availability for hosting information sessions based on your office's capabilities. We recommend hosting at least two, 30- or 45-minute information sessions with applicants weekly. Hit Save and close.

Finally, go to the Communications section and set email and/or text (if you ask for a phone number) reminders here. We recommend setting reminders for a day before and an hour before their scheduled interview.



### **STEP 3: CONNECT YOUR CALENDAR**

Go to the left sidebar and click on Integrations and Apps. Choose Calendars from the list on the left and choose the type of calendar(s) you want to connect – Google, Outlook, iCloud, Exchange.

NOTE: Make sure you are logged into that email/calendar so that your Calendly and calendar talk to each other and sync up.

You can connect multiple calendars to your account but can have calendar notifications go to only one of them – the one you set as primary.

**VIDEO:** [Connecting your calendar to Calendly](#)

### **STEP 4: CONNECT YOUR ZOOM ACCOUNT**

Go to the left sidebar and click on Integrations and Apps. Choose Video conferencing from the list on the left and choose the platform you want to use – Zoom, Google Meet, Microsoft Teams, GoTo Meeting, or Webex.

NOTE: We recommend hosting your information session with applicants over Zoom because that is likely the platform your candidates are most comfortable with.

Make sure you are logged into your Zoom account and follow the prompts from Calendly to connect them. Calendly will automatically send applicants a Zoom link in the calendar notification and email reminders.

**Video:** [Connecting Zoom to your Calendly](#)

**Congratulations! You can now quickly and easily schedule applicants for their initial interview!**