TIDYCAL: SETTING UP YOUR ACCOUNT

Your TidyCal 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 TidyCal 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 to your preferred video conferencing platform (Zoom is recommended).

STEP 1: EDIT YOUR ACCOUNT DETAILS

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

Go to the top right of your screen and click the dropdown, choose Settings and upload a photo, edit your booking page link, your booking page messaging, change your color theme, and anything else you want to change. Make sure you hit Save changes.

Video: Personalize your TidyCal Profile

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 at the end of the application.

Click Edit on the bottom right of the event. Scroll through fields and change anything you want to change e.g. event duration, description (we have boilerplate language pre-loaded for you), days and times of your interviews, etc. 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 group interviews with applicants weekly.

Next, click View advanced booking type settings and change whatever you think necessary:

- The location of the interviews (we recommend you choose Zoom).
- How far out an applicant can schedule (no more than 30 days).
- A buffer before or after each interview.

- How many people can sign up for any given interview.
- Questions to ask applicants when they sign up.
- Customize the email reminders (we recommend a reminder be sent 1 day and 1 hour before their scheduled interview).

Finally, don't forget to hit Update calendar booking to save your changes.

VIDEO: Guide to Booking Customizations

STEP 3: CONNECT YOUR CALENDAR

Go to the top right menu again and click on Integrations. Choose Calendars from the list on the left and choose the type of calendar(s) you want to connect to – Google, Office365, or Apple.

NOTE: Make sure you are logged into that email/calendar so that your TidyCal 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 TidyCal

STEP 4: CONNECT YOUR ZOOM ACCOUNT

While in Integrations, choose Video conferences from the list on the left and choose the platform you want to use – Zoom or Google Meet.

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 TidyCal to connect them. TidyCal will automatically send applicants a Zoom link in the calendar notification and email reminders.

Video: Connecting Zoom to your TidyCal

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