# Booking meetings with personalized scheduling links

## Summary

If you use one or more active "Drive Action" Conversations, or any other active Conversations capable of using the "Scheduling Link" dynamic field, can now add personalized scheduling links to your users' settings to enable contacts to book meetings directly with your team.

This allows, for example, each individual salesperson to use a custom scheduling tool connected with their personal work calendar, so long as the tool provides personalized URLs for each user.

When enabled, the AI Assistant will send the assigned user's custom scheduling link to a lead when appropriate, rather than the scheduling link set as a default in the Conversation Editor or from a CRM pull field.

The "Scheduling Link" field is used as part of the "Verify Phone" exchange in applicable Conversations.

## Prerequisites

- One active "Drive Action" Conversation, or one active Conversation that uses the "Scheduling Link" dynamic field.
- All associated "Scheduling Link" dynamic field values are provided in the Conversation Editor for the applicable Conversations, including the following:
  - **Scheduling Link** -
    - If you *have a default or "fallback" scheduling link* please enter it in the Scheduling Link field for whenever an assigned User does not have a Custom Scheduling Link value saved on their User Settings page.
    - If you *do not have a default scheduling link*, please ensure all of the users that will be working these leads have a Custom Scheduling Link set up in User Settings.
  - **Scheduling Link Description** - This variable is used to describe what a scheduling link will provide to the leads.
  - **Scheduling Link Display -** This variable will be the display of the scheduling link that is provided.
- One or more applicable Users have a personal scheduling URL saved on their User Settings page.

## How to Use

**Activate or confirm that one or more Conversations with the "Verify Phone" exchange or "Drive Action" capability are active on your account**

1. Navigate to the Conversation Editor from the **Conversations** tab on the Conversica dashboard.
2. Search for or scroll down the list of Conversations to verify that one or more "Drive Action" Conversations are active and present on your account.

**Ensure that all Scheduling Link Dynamic Fields are filled out for the appropriate lists (Salesforce Campaign, etc.) on your selected Conversation(s).**

1. Once you have identified a "Drive Action" conversation, select the list (e.g. a particular Salesforce Campaign) with which you would like to use Custom Scheduling Links.
2. Locate the **Verify Phone** exchange under an Assistant heading, and click on "Review/Edit."
3. From this modal, locate and fill in values for all four of the Scheduling Link dynamic fields ("Scheduling Link," "Scheduling Link Description," and "Scheduling Link Display").

4. The "Scheduling Link" value should be the URL you want being used as a default whenever the individual User that's assigned to the lead does not have a custom URL saved.

## Have each User add and save their own scheduling URL on their User Settings page.

1. Once you confirm the Conversation(s) and list(s) are properly set up to use Scheduling Links, each individual User can specify their custom scheduling URL.
2. From the Conversica dashboard, navigate to: **Settings > Users, Profiles & Teams**.
3. On this page, locate and select the desired User. Hover over their name and click on "Edit."
4. Within this **Edit User** modal, the **Custom Scheduling Link** option is available near the bottom, just below the heading of "Miscellaneous Settings."



5. To add a custom URL, click on the "Yes" radio button. This will present a text field for the URL.

6. Type or paste the User's custom URL for scheduling, and click "Save" when done.



7. Moving forward, any new leads assigned to this User on an enabled Conversation will receive the User's custom URL from the AI Assistant whenever appropriate.