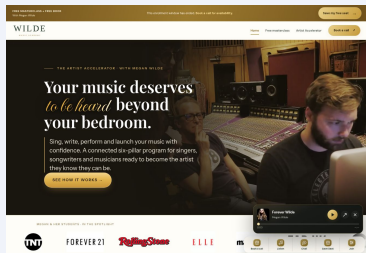


Calendar handoff checklist

Make bookings visible to the people delivering the service.



FROM THE SETLY PROJECT LIBRARY

A real project screenshot for visual inspiration. Follow the written steps for your own business.

YOUR ACTION PLAN

- 1 Confirm which team member receives each appointment type.
- 2 Check working hours and the connected calendar used to detect conflicts.
- 3 Verify the confirmation, reminder and cancellation routes.
- 4 Book a sample appointment and ask the assigned person to locate it.

EXAMPLE - ILLUSTRATIVE

A consultation booked with one team member must not appear only in the agency administrator's inbox.

CHECK YOUR RESULT

Can the assigned person find and manage the booking?

Calendar handoff checklist

Use the prompts below to make this resource specific to your business. Save a local copy after completing it. Keep passwords and private customer data out of this worksheet.

Appointment type:**Assigned owner:****Availability:****Calendar connection:****Notification route:****Test booking:****DONE WHEN**

Can the assigned person find and manage the booking?

FURTHER READING

[HighLevel Support](#)

Independent Setly planning resource. Platform settings and requirements can change; use the linked official help for current configuration details.