# Scheduling Handbook

A shared calendar for the whole platform — book conflict-checked appointments against your staff, publish self-service booking pages, and let HR, CRM and Operations attach their own records to the same diary.

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## Reference

Scheduling is the platform's shared diary. It holds appointments against the people in your organisation, calculates who is genuinely free before anything is booked, and lets external contacts book themselves in through a public offering page. It is deliberately a shared service — like chat — so HR interviews, CRM meetings and Operations site visits all live on one calendar rather than each app keeping its own. Cancellations and reschedules can be routed for approval, reminders and confirmations go out through the platform's Communication Hub, and every appointment can be attached to the record it belongs to.

This guide is a reference for what the module does and how the pieces fit together. It describes IXL CORE **version 1.0**.

### Overview

At a glance, Scheduling covers these connected areas:

- **Appointments** — the calendar entries themselves, with attendees, links and a lifecycle.
- **Availability** — each person's working hours, blocked days and bookable slots.
- **Booking pages** — public, self-service offerings that external people can book against.
- **Public booking** — the tokenised, no-login surface that outside contacts use.
- **Reminders & confirmations** — automatic messages sent when an appointment is booked or approaching.
- **Settings** — the organisation's business calendar, default duration, buffers and approver.

Every record is scoped to your organisation, and every action is governed by permissions (see Access & permissions).

### Appointments

An **appointment** carries a title, an optional description, a type (**meeting, interview, onboarding, site visit, service, review** or **other**), a start and end time with a timezone, an all-day flag, a location and an optional meeting link. Each has an organiser and a list of **attendees** — either internal staff (chosen from the people directory) or external guests captured by name and email. Every appointment gets a reference number and a generated `.ics` file so it can be added to any external calendar.

When you create or reschedule an appointment, the module **checks for conflicts** before saving: it locks the affected staff rows and rejects a slot that overlaps another active appointment or approved leave for the organiser or any internal attendee. A double-booking is refused with a clear error unless the person holds the dedicated conflict-override permission, in which case the override is recorded in the audit trail rather than silently allowed.

An appointment moves through a lifecycle — **scheduled !’ confirmed !’ in progress !’ completed**, or is set aside as **cancelled**, **no-show** or **rescheduled**. Confirm, complete and no-show are one-click transitions. **Cancel** and **reschedule** are treated as approval moments: when an approver can be resolved (an explicit approver, the organisation's configured default, or the organiser's line manager from HR), the request is routed for sign-off; otherwise it is applied immediately. Attendees can record their own **RSVP** (invited, accepted, declined or tentative).

A **recurrence rule** expands into a chain of concrete instances, and a cancellation can either drop a single instance or the whole series in one action.

**Typical steps**

1. Go to **Scheduling !’ Calendar** and create an appointment, setting the time, organiser and attendees.
2. The slot is conflict-checked; a confirmation and a scheduled reminder are queued automatically.
3. Confirm, complete, cancel or reschedule as the appointment progresses — cancel and reschedule may route for approval.

## Availability

Each person has an **availability** record that drives the free-slot maths: a timezone, **working hours** per weekday, specific **blocked days**, a default slot length, and buffers to leave **before and after** each booking. A person can be marked bookable or not. The **slots** endpoint composes this record with the organisation's business calendar, existing appointments and approved HR leave to return the genuinely free windows for a given date range and duration — so nothing is offered that the person cannot actually take.

A lightweight **people directory** backs the organiser and attendee pickers, resolving staff by name or email without exposing internal data.

## Booking pages

A **booking page** is a public offering you publish so people outside the organisation can book time. It has a title, description, appointment type, a fixed duration, before/after buffers, a booking **horizon** (how far ahead bookings are allowed), a **minimum notice** period, a timezone, and one or more **providers** (the staff whose availability backs it). Each page is either active or not, and carries an unguessable public slug that acts as its address.

The number of **active** booking pages is subject to your plan's external-booking entitlement; activating one beyond the limit is refused with a message showing the cap. Deleting a page deactivates it and detaches its providers.

**Typical steps**

1. Go to **Scheduling !’ Booking pages** and create a page, choosing the duration, horizon, notice and providers.
2. Activate it and share the public link.
3. Bookings made against the page appear on the calendar as ordinary appointments.

## Public booking

The **public booking** surface needs no login: the booking page's slug (or a per-appointment public hash) is the credential, exactly as the platform's other tokenised public flows work. An external person can view the offering, fetch the free slots over a date range (clamped by the page's horizon and minimum notice), and **book** by supplying their name, email and chosen slot — which creates the appointment. If the slot was taken in the meantime, the booking is refused so two people cannot claim the same time.

After booking, the person gets a confirmation summary and can download the `.ics`. They can **request** a cancellation or reschedule against their appointment hash, but those requests route through approval — an external person can never mutate the calendar directly.

## Reminders & confirmations

When an appointment is booked, an **immediate confirmation** is sent to attendees, and a **reminder** is scheduled to fire ahead of the start time using the organisation's configured lead time. A reschedule re-arms the reminder against the new time. These messages go out through the platform Communication Hub, subject to the tenant's messaging configuration.

## Settings

Scheduling keeps no private settings store of its own — its configuration lives on the platform's shared-settings engine. A manager can set the organisation's **working days**, **timezone**, default **appointment duration**, **before and after buffers**, the **reminder lead time**, and the **default approver** for cancel and reschedule sign-offs. The approver is always chosen from a people picker, never typed as a raw id, and every change is audited.

## Access & permissions {#access-and-permissions}

Every Scheduling action maps to a specific capability — for example `scheduling.appointments.view`, `scheduling.appointments.manage`, `scheduling.appointments.override_conflict`, `scheduling.availability.manage`, `scheduling.booking_pages.manage` and `scheduling.settings.view` are each separate permissions, enforced on every request rather than merely hidden in the interface. Overriding a conflict needs its own dedicated capability beyond ordinary manage rights. Records are scoped to the organisation, and a booking-page slug or appointment hash from one organisation can never reach another — the lookup simply returns not-found. The number of active booking pages is additionally governed by the external-booking entitlement on your plan.

## How Scheduling connects

Scheduling is a shared platform service, not a standalone app:

- **HR** supplies the workforce identities behind organisers and attendees, the approved leave that blocks slots, and the line-manager reporting line used to resolve a cancel or reschedule approver.
- **CRM, Operations and other apps** attach their own records to an appointment through a polymorphic link, so a meeting or site visit is reachable from the deal or job it belongs to.
- **The approvals engine** handles cancel and reschedule sign-offs, including every external request from a public booking.
- **The Communication Hub** delivers booking confirmations and reminders.
- **The shared-settings and audit engines** hold the business-calendar configuration and record every override and change.

That is the point of building it once: you keep a single diary for the whole business, and every app books against the same conflict-checked availability instead of rolling its own.

# How-to guides

## Book an appointment

*Create a conflict-checked appointment on the shared calendar with an organiser, internal and external attendees.*

Scheduling is the platform's shared diary. Booking an appointment records a titled calendar entry against your staff, checks that nobody is double-booked before it saves, and queues a confirmation and reminder automatically.

### Before you start

- You need the **scheduling.appointments.manage** permission to create appointments; view-only users can see the calendar but not book.
- Have the organiser and any attendees in mind — you look people up by name or email, never by an internal ID.
- To knowingly book over an already-occupied slot you additionally need the **scheduling.appointments.override_conflict** permission.

### Steps

1. Open **Scheduling !' Calendar** and select **+ Add** on a day, or click a time slot in the week or day view to pre-fill the start. [screenshot: Scheduling calendar with the New appointment button]
2. In the **New appointment** dialog, enter a **Title** (required) and choose a **Type** — meeting, interview, onboarding, site visit, service, review or other.
3. Set **Start** and **End** (the end must be after the start) and pick a **Timezone**.
4. Optionally add a **Location** and a **Meeting link**.
5. Use the **Organiser** picker to search staff by name or email and select who owns the appointment.
6. Under **Internal attendees**, add staff members; each selected person appears as a chip you can remove. Optionally add one **External attendee (optional)** by name and **External email**. [screenshot: New appointment form with organiser and attendee pickers]
7. To create a repeating series, set **Repeat** to Daily, Weekly or Monthly and enter the number of **Occurrences**.
8. Select **Create appointment**.

## Result

The appointment is saved with a reference number and appears on the calendar. Before saving, the module locks the organiser and internal attendees and rejects the slot if any of them already has an overlapping appointment or approved leave — you see a conflict error unless you hold the override permission, in which case the override is written to the audit trail. A booking confirmation is sent immediately and a reminder is scheduled ahead of the start time. A recurrence rule expands into a chain of concrete instances, and a `.ics` file is generated for external calendars. Attendees can later record their own RSVP.

## Related

- Set your availability and working hours
- Publish a public booking page
- Reschedule or cancel an appointment
- Scheduling reference

# Set your availability and working hours

*Define a staff member's working hours, blocked days, slot length and buffers so only genuinely free time is offered.*

Each person has an availability record that drives the free-slot maths. It sets their working hours per weekday, the days they are blocked out, a default slot length and the buffers to leave before and after each booking — so nothing is offered that the person cannot actually take.

## Before you start

- You need the **scheduling.availability.manage** permission to edit availability; without it the editor is read-only.
- You do not need to know anyone's ID — staff are found by name or email.

## Steps

1. Open **Scheduling !' Availability** and use the people picker to search for a staff member by name or email. [screenshot: Availability editor with the staff picker]
2. For each weekday, set the working-hours ranges. A day with no ranges shows **Not working**. Select **+ Add hours** on a day to add a range, then enter the **from** and **to** times (24-hour). You can add more than one range per day, and remove any range with its ' control. [screenshot: Weekday working-hours rows]
3. Set the **Timezone** for this person's calendar.
4. Set **Slot length (min)** — the default booking length used when composing free slots.
5. Set **Buffer before (min)** and **Buffer after (min)** — the gaps to keep clear around each booking.
6. Select **Save availability**.

## Result

The availability record is saved. The slots calculation now combines these working hours, buffers and slot length with the organisation's business calendar, existing appointments and approved HR leave to return only the windows the person is genuinely free. Specific blocked days are held on the same record and excluded from offered slots. A person can also be marked as not bookable, in which case no slots are offered for them. These settings back the appointment pickers and any booking page the person is a provider on.

## Related

- Book an appointment

- Publish a public booking page
- Reschedule or cancel an appointment
- Scheduling reference

# Publish a public booking page

*Create a self-service booking page backed by staff availability and share its public link, subject to your plan's active-page limit.*

A booking page is a public offering you publish so people outside the organisation can book time against your staff's availability. Each page has an unguessable public link that acts as its address, and bookings made through it appear on the calendar as ordinary appointments.

## Before you start

- You need the **scheduling.booking_pages.manage** permission.
- At least one provider must have their **Availability** set up — a page's open slots come from each provider's availability editor.
- The number of **active** booking pages is capped by your plan's external-booking entitlement; the panel shows your usage and warns when you reach the limit.

## Steps

1. Open **Scheduling !' Booking pages**[screenshot: Booking pages panel with the active-page usage]
2. Start a new page and enter a **Title** and a **Duration (min)** (defaults to 30).
3. Under **Providers**, search staff and add one or more people whose availability will back the page; each appears as a chip you can remove. At least one provider is required.
4. Select **Create booking page**. New pages are created active, so this consumes one of your entitlement slots — if you are at the limit, deactivate another page first.
[screenshot: Create booking page form]
5. On the saved page, copy the **Public link** with **Copy** and share it. Use **Activate** / **Deactivate** to control whether the page accepts bookings, and **View bookings** to see appointments made through it.

## Result

The page is published with a public link. External visitors open it with no login — the slug in the link is the credential — view the offering, fetch free slots (clamped by the page's booking horizon and minimum notice), and book by giving their name, email and a chosen slot, which creates an appointment on your calendar. If the slot was taken in the meantime the booking is refused so two people cannot claim the same time. Deleting a page deactivates it and detaches its providers. A slug from one organisation can never reach another.

## Related

- Set your availability and working hours
- Book an appointment
- Reschedule or cancel an appointment
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# Reschedule or cancel an appointment

*Move an appointment to a new time or cancel it, with cancel and reschedule routed for approval when an approver can be resolved.*

Cancelling and rescheduling are treated as approval moments. When an approver can be resolved they route for sign-off; otherwise the change is applied immediately. For a recurring appointment you can cancel a single instance or the whole series.

## Before you start

- You need the **scheduling.appointments.manage** permission.
- Reschedule re-checks for conflicts against the new time; moving over an occupied slot requires the **scheduling.appointments.override_conflict** permission.
- An appointment already in a final state (completed, cancelled, no-show) cannot be cancelled or rescheduled.

## Steps

### Reschedule

1. Open **Scheduling !’ Calendar** and select the appointment to open its drawer.
2. Select **Reschedule** to reveal the form, then enter a **New start**, a **New end** (after the start) and an optional **Reason**. [screenshot: Reschedule form in the appointment drawer]
3. Select **Request reschedule**. The new time is conflict-checked, and the reminder is re-armed to fire ahead of the new start.

### Cancel

1. Open the appointment drawer.
2. For a one-off, select **Cancel**. For a recurring appointment, select **Cancel this** to drop the single instance, or **Cancel series** to cancel the whole recurrence chain in one action. [screenshot: Cancel and Cancel series buttons]

## Result

For a cancel or reschedule, the module resolves an approver in this order: an explicitly chosen approver, the organisation's configured **default approver**, then the organiser's line manager from HR. If an independent approver is found, the request is routed for sign-off and the appointment shows a pending approval; if the only candidate is you, or no approver exists, the change is applied immediately. **Cancel series** is an explicit bulk action and is applied without approval routing. Other lifecycle moves — **Confirm**, **Complete** and **No-show** — are one-click transitions on the same drawer. External attendees who booked through a public page can only *request* a cancel or reschedule, which always routes through approval.

## Related

- Book an appointment
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