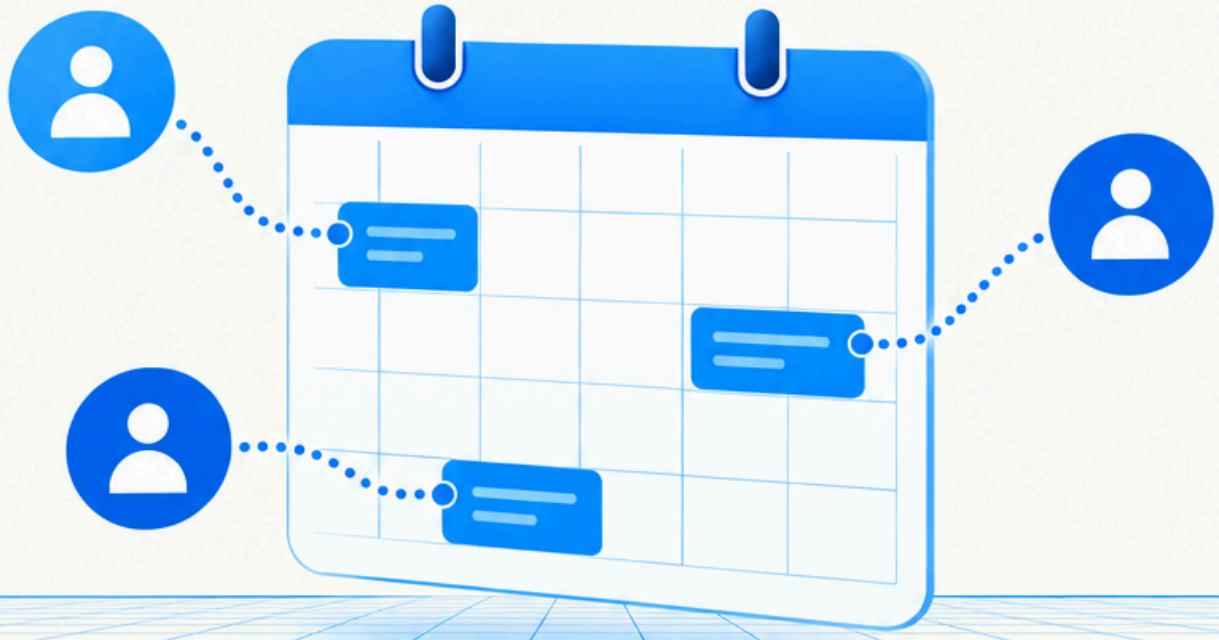
THE BOOKING CALENDAR

LET THE TEAM SHARE THE LOAD



MICHAEL REIMER

HIGHLEVEL GUIDES · VOLUME 05 · CALENDARS

SET UP THE BOOKING CALENDAR AND LET THE TEAM SHARE THE LOAD.

A round robin calendar hands each new booking to an available team member without anyone checking who is free. This guide takes you from an empty Calendars screen to a live calendar with working hours, distribution rules, a synced Google or Outlook calendar and a link or embed code you can share. At the end, a prospect picks a time and the right person gets the appointment.

6	43	60 min
PARTS	STEPS	TO BUILD

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Updated November 3, 2026

WHAT YOU ARE BUILDING

WHAT YOU ARE BUILDING **AND WHAT IT DOES.**

One round robin calendar for a team of two or more people. A prospect opens the booking page, sees only times when someone on the team is free, and books. HighLevel assigns the appointment by availability or by equal distribution, keeps repeat clients with the person they already know, and writes the appointment to each team member's own Google or Outlook calendar so nobody gets double booked.

- ✓ One booking link that spreads appointments across the whole team
- ✓ Working hours, buffers and date overrides that keep each day realistic
- ✓ Distribution and assignment rules that decide who gets each booking and each reschedule
- ✓ Each team member's Google or Outlook calendar synced so outside events block the slot
- ✓ A calendar embedded on your site or shared as a link

BEFORE YOU START

BEFORE YOU START, **HAVE THESE READY.**

Gather these once and the build goes straight through.

- Admin or user level access to Calendar Settings in the subaccount
- Every team member who will take bookings added as a user in the subaccount

- Each team member's own Google account or Outlook account login, since calendar connections are tied to the individual user, not the company
- The meeting length, buffer and working hours you want for the team
- A decision on the distribution method: Optimize for Availability or Optimize for Equal Distribution
- A page on your site, or a HighLevel funnel page, where the calendar will live

> **i** Build the calendar first, then set hours, then distribution and assignment rules. Connect Google or Outlook before you test, because **each team member connects their own calendar** while logged in as themselves.

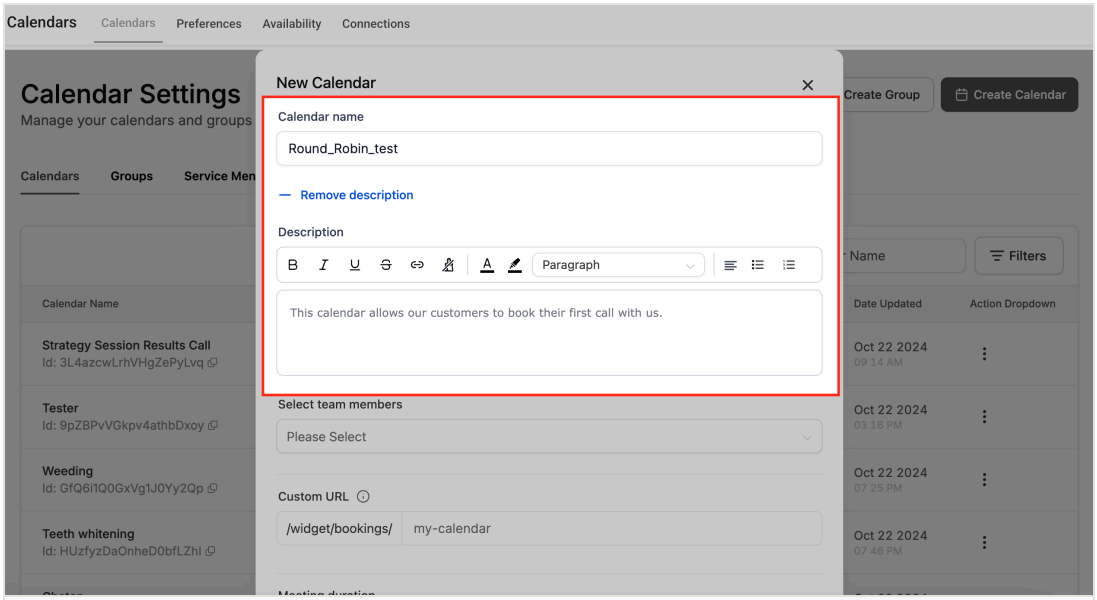
PART 01 OF 06

01 CREATE THE CALENDAR **AND ADD THE TEAM.**

This part creates the round robin calendar itself and puts the team on it. Everything else in the guide lives inside this one calendar.

01 Go to **Settings**, then **Calendars**, and click **Create Calendar**.

02 Select **Round Robin** as the calendar type.



The calendar name, description and team members are set on the first screen.

03 Enter a **Calendar Name** and a **Description** that says what the meeting is for.

04 Select the **Team Members** who will receive appointments through this calendar.

05 Edit the **Custom URL** slug if you want a cleaner link. HighLevel checks whether the slug is taken and prompts you if it is.

06 Set the **Meeting Duration**.

07 Turn on **Accept Payments** only if you charge for the meeting, then pick the currency and add a description under **Payment Information**.

08 Click **Save**.

i If no team member is free at a time, HighLevel hides that slot. The prospect is asked to pick another date or time instead of booking an empty slot.

PART 02 OF 06

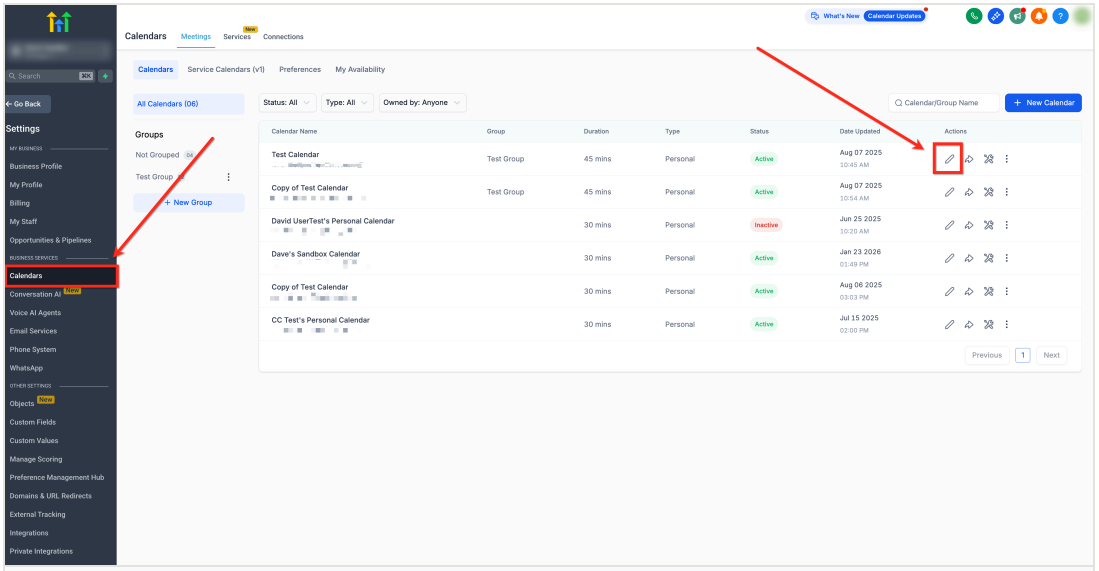
02 SET THE HOURS AND THE SPACING BETWEEN MEETINGS.

Working hours decide when the calendar can accept a booking. Slot and buffer settings decide how those hours get carved up. Get the buffer right here and the rest of the day stays realistic.

01 Go to **Calendars**, then **Calendar Settings**, and click **Edit Calendar** on your round robin calendar.

02 Select **Availability** in the left menu.

03 Under **Booking Availability**, click a team member's name to open the side panel.



Weekly working hours repeat every week. Date specific hours override single dates.

04 In **Weekly Working Hours**, click **Edit** and set the hours for each day. Click **Copy** to apply one day's hours to other days.

05 Click the blue **Save** button.

06 To override a holiday or special day, click **+ Add Date Specific Hours**, select the dates, set the **Start time** and **End time**, and save.

07 Set the **Slot Interval**, the **Buffer** before or after each appointment, **Appointments per slot** and **Appointments per day**.

08 Set the **Minimum scheduling notice** and the **Date range** so last minute bookings and far future bookings stay within reason.

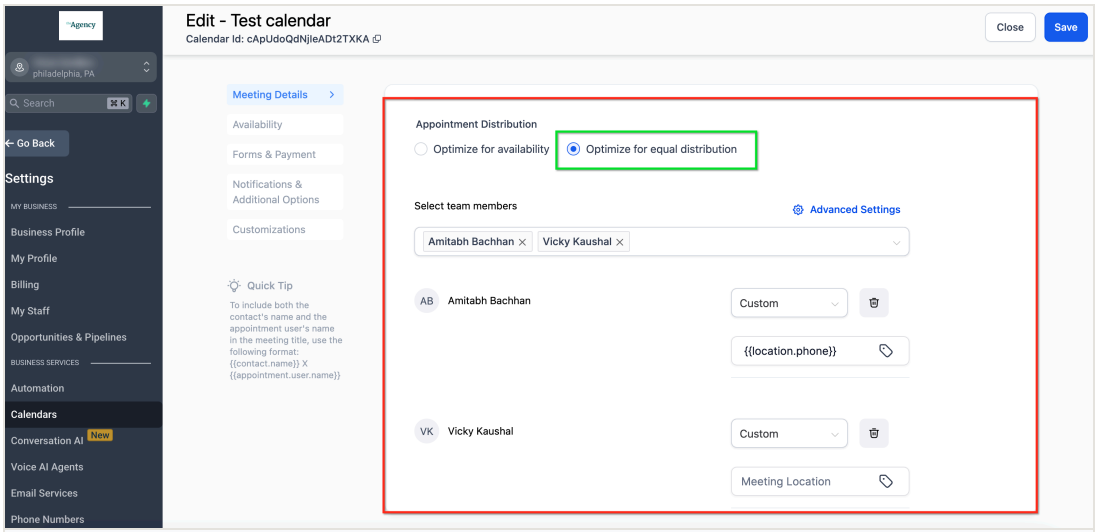
i Date Specific Hours replace the weekly hours for that date. To extend a day, enter the full range you want open, not only the extra hours.

PART 03 OF 06

03 PICK THE DISTRIBUTION METHOD **AND SET PRIORITY.**

This is where you tell HighLevel how to choose between team members when more than one is free. The two methods behave differently, so pick the one that matches how the team works.

01 Open the calendar settings and find the distribution options for the round robin calendar.



Optimize for Availability or Optimize for Equal Distribution. Only one applies at a time.

02 Choose **Optimize for Availability** to send each booking to whoever is free at that time, with higher priority members considered first.

03 Or choose **Optimize for Equal Distribution** to spread bookings evenly over the month, so nobody gets more than three appointments ahead of anyone else.

04 Set each team member's priority to **High**, **Medium** or **Low**.

05 Pick a default **Meeting location** for each team member, such as Zoom or a physical address.

06 Turn off **Allow Staff Selection** if you want true automatic assignment. When it is on, the booker can pick a person and the distribution logic is skipped.

07 Save the calendar.

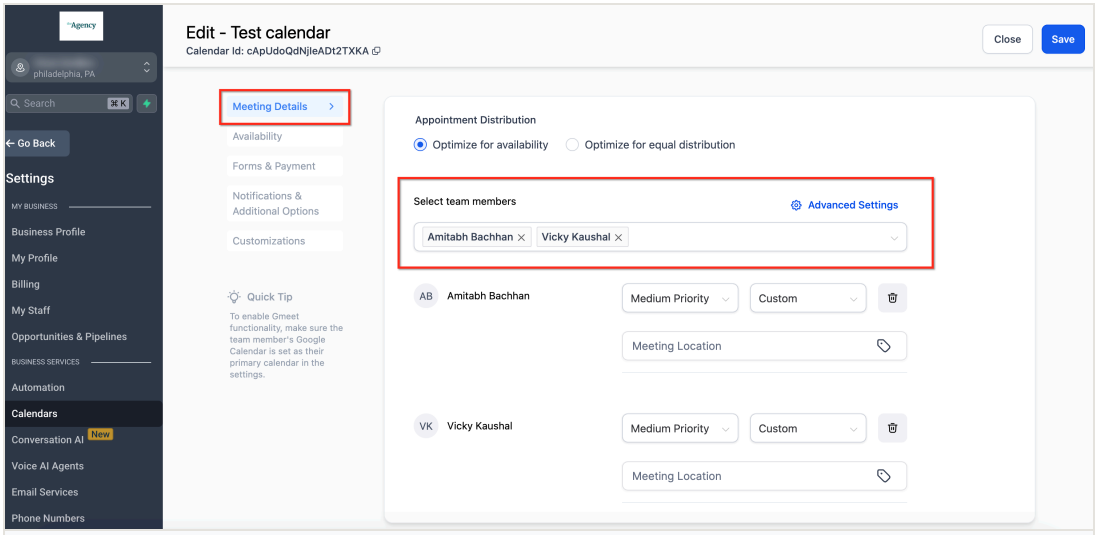
i Adding or removing a team member resets the meeting counts, and so does switching between the two distribution methods. Settle the team and the method before the calendar goes live.

PART 04 OF 06

04 DECIDE WHO KEEPS THE CLIENT **ON REPEAT BOOKINGS.**

Distribution handles brand new leads. Assignment rules handle the contact who already has a person on your team. These settings keep that relationship intact and decide what happens when someone reschedules.

01 In the calendar settings, open **Advanced Settings**.



Assignment rules sit under Advanced Settings in the round robin calendar.

02 Turn on **Always Book with Assigned User** so a contact who already has an assigned user gets that person's slots first.

03 Turn on **Assign Contacts to Their Respective Calendar Team Members** so a new booking assigns the contact to the person they booked with.

04 Turn on **Automatically Assign a Contact's Future Appointments to the Same Team Member** so later bookings stay with that person.

05 Under the reschedule options, choose **Keep Same Appointment Owner** to show only the original owner's slots, or **Reassign Through Round Robin** to let anyone take it.

06 Confirm **Allow Staff Selection** is off so bookers cannot change the staff member on the widget.

07 Save the calendar.

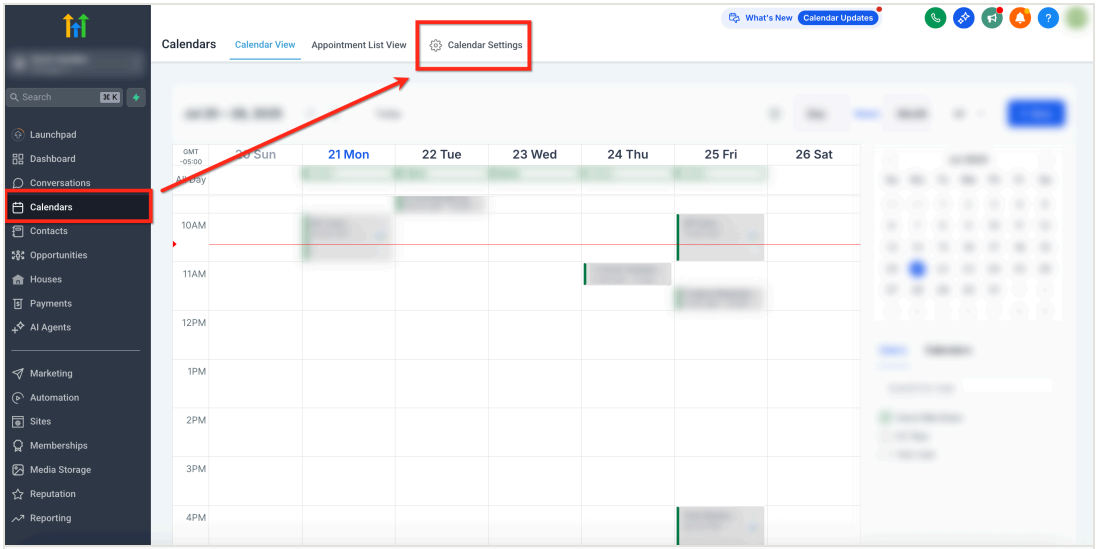
> **i** If the assigned user is not a team member on this calendar, HighLevel falls back to round robin among the calendar's team. Add that user under the calendar's **Team Members** tab if they should be in the rotation.

PART 05 OF 06

05 CONNECT EACH PERSON'S CALENDAR **SO NOTHING DOUBLE BOOKS.**

Calendar connections belong to the individual user, not the company. Each team member logs in as themselves and connects their own Google or Outlook account. Do this for every person on the calendar.

01 For Google, go to **Calendars**, click **Calendar Settings** in the upper right, then click the **Connections** tab and press **+ Add New**.



Google connects under Calendar Settings, then Connections. Outlook connects under Settings, then Profile.

02 Click **Connect** beside **Google Calendar**, select the Google account and accept all requested permissions.

03 If a permissions warning appears, go to **Settings**, then **Integrations**, then **Google**, and click **Reconnect**.

04 For Outlook, go to **Settings**, then **Profile**, and in the **Integrations** section connect the Outlook account. Log in and allow LeadConnector to access the calendar.

05 Scroll to **Calendar Configuration**, click the edit button under **Primary Calendar**, select the calendar that should receive bookings, and save.

06 Click the edit button under **Check for Conflicts**, select the calendar HighLevel should read for busy times, and save.

07 Repeat for every team member on the round robin calendar.

i Grant full writer access when Google asks, or sync can fail. One user can write appointments to only one outside calendar at a time, Google or Outlook, not both.

PART 06 OF 06

06 PUT THE CALENDAR **WHERE PROSPECTS CAN BOOK.**

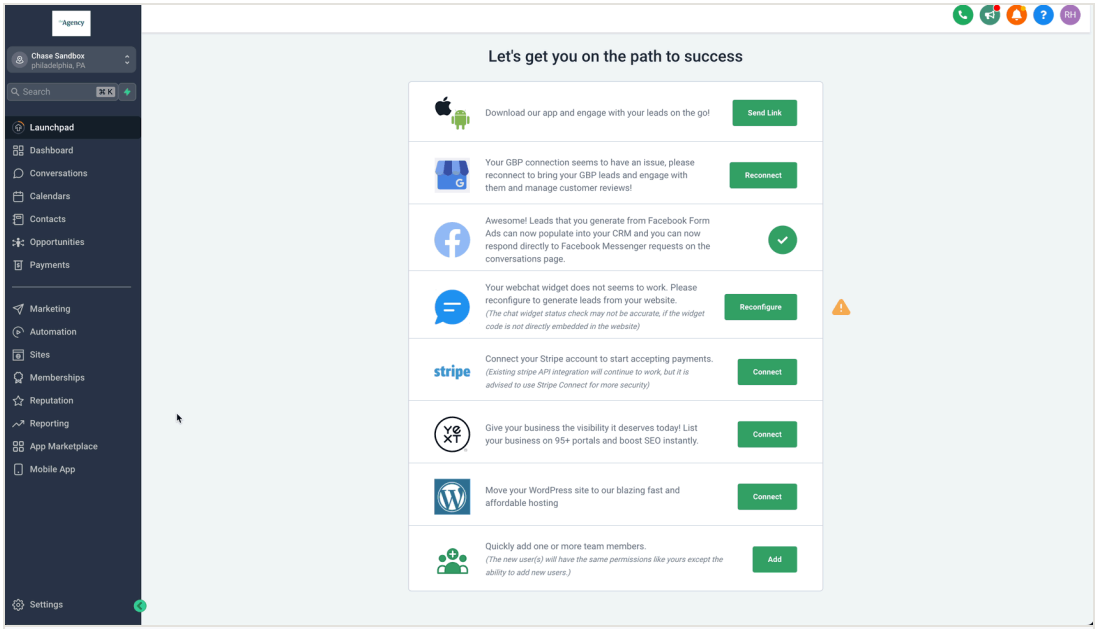
The calendar is built. Now give it a home. You can share the link directly, paste the embed code on any site, or drop it into a HighLevel page with the Calendar element.

01 Go to **Calendars**, then **Calendar Settings**.

02 Click the three dots next to your round robin calendar and select **Share**.

03 Copy the booking link if you want to send it by email or text.

04 To embed on an outside site, select the **Embed Code** tab in the share window and click **Copy**.



The embed code comes from Share, then Embed Code, on the calendar's three dots menu.

05 Paste the code into a custom code element on the page where the calendar should appear.

06 For a HighLevel funnel or website page, use the **Calendar** element in the page builder and pick this calendar instead of pasting code.

> **i** Preview the calendar from the three dots menu before you share it. Edit settings later from the same menu by selecting **Edit**.

TEST IT

TEST IT
BEFORE YOU SEND THE LINK.

Book a few test appointments and watch where each one lands.

01 Open the booking link in a private browser window. You should see only times inside the working hours you set.

02 Book a test appointment. The booking should appear in HighLevel under **Calendars** assigned to one team member.

03 Open that team member's Google or Outlook calendar. The same appointment should show there within a short wait.

04 Book a second and third test appointment at different times. With Optimize for Equal Distribution, bookings should rotate across the team. With Optimize for Availability, each should go to whoever is free.

05 Add a busy event to one team member's connected calendar, then reload the booking page. That person's time should no longer show as open.

06 Reschedule a test appointment from the confirmation. With Keep Same Appointment Owner on, only the original owner's slots should appear.

07 Check the slot spacing. Two appointments should never sit back to back if you set a buffer.

WHEN A STEP FAILS

WHEN IT DOES NOT WORK, **CHECK THESE FIRST.**

Most calendar problems trace back to a connection or a hidden setting.

Google calendar is not syncing

Go to Settings, then Integrations, then Google, and look for a missing permissions warning. Click Reconnect and accept every permission, including writer access.

The Google calendar is not listed when connecting

Log out of every Google account in the browser, then reconnect using the correct account.

A deleted calendar banner appears

Click Fix This on the banner, remove the deleted calendars, then reconnect or select an active calendar.

Appointments are not syncing to or from Outlook

Edit the Primary calendar, choose Do not sync events to the primary calendar, save, then reselect the same calendar.

Weekly hours vanished on a date

Date Specific Hours replace weekly hours for that date. Enter the full range you want open on that date, not only the added hours.

Not every team member shows in the booking dropdown

The dropdown lists only users on that calendar. Go to Calendars, select the calendar, open the Team Members tab and add the user.

FROM THE FIELD

MICHAEL'S **TAKE.**



Michael Reimer

FOUNDER OF CRM PROS · HIGHLEVEL COMMANDER

The first thing I lock in is the buffer. A team calendar without breathing room between meetings looks fine on paper and falls apart by Tuesday. Give people time to travel, write notes or reset, then test a few bookings and confirm the slots line up before anyone outside the company sees the link.

Where people go wrong is staff selection. They want equal distribution, they leave Allow Staff Selection on, and the distribution logic never runs because every booker picks a name. Turn it off. Then turn on Always Book with Assigned User so a client who already has a relationship with someone on the team stays with that person. Automatic distribution and continuity are not in conflict when both settings are right.

This build pays off the day you add a second person who takes meetings. One link, one calendar, no checking who is free, and nobody gets overloaded while someone else sits idle. Connect each person's own Google or Outlook calendar before launch, and the double booking problem goes away with it.

GO DEEPER

THE FEATURES **BEHIND THIS BUILD.**

Every feature this guide touches has its own page in the library, with the settings, limits and Michael's notes.

CALENDARS & APPOINTMENTS

Round robin calendars in HighLevel: Setup, distribution and availability

CALENDARS & APPOINTMENTS

Appointment Distribution Logic for Round Robin Calendars

CALENDARS & APPOINTMENTS

Calendar Availability: Weekly Working Hours & Date Specific Hours

CALENDARS & APPOINTMENTS

Adjusting Availability Settings for Individual Calendars

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Integrating Google with HighLevel calendars

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How to sync HighLevel Calendars with Outlook

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How to embed HighLevel calendars using HTML code

CALENDARS & APPOINTMENTS

Managing team member assignments in round robin calendars