What is Agency Plan

TidyCal Lifetime License – Tier 2 (Agency Plan)

TidyCal's Tier 2 Lifetime License is perfect for agencies, businesses, and teams seeking advanced scheduling features without recurring monthly charges.

A one-time payment gives you lifetime access to a powerful and intuitive booking system that streamlines appointments, meetings, and client interactions.

Although an agency license allows the creation of teams and invite members, each account's features are determined by its own **active license**. In other words, team members do not inherit the Tier 2 enhancements; those benefits are only available on accounts that specifically have the Tier 2 license active.

Buying TidyCal for the 1st time?

Key Features of Tier 2 (Agency Plan)

🏆 25 Personal Calendar Connections

➔ Seamlessly integrate with Google, Office 365, and Apple iCal (including sub-calendars) for smooth scheduling across multiple platforms.

🏆 Unlimited Active Booking Types & Unlimited Bookings

➔ Create as many booking types as you need and accept an unlimited number of bookings every month.

🏆 Advanced Team Features

➔ Dedicated Teams Page: A centralized booking page where clients can choose which team member to schedule with.
➔ Round Robin Meetings: Distribute bookings evenly among team members for a fair and automated scheduling process.

➔ Collective Meetings: Schedule meetings where multiple hosts can meet with one or more attendees.
➔ Invite Unlimited Team Members: Perfect for agencies, startups, and growing teams.

🏆 Enhanced Customization & Controls

➔ Manually Approve or Deny Booking Requests
➔ Booking Limits: Set daily, weekly, or monthly booking caps for different appointment types.
➔ Multiple Meeting Locations: Allow attendees to choose between in-person, virtual, or phone call meetings.
➔ Custom Email Reminders: Personalize email notifications with custom text and timing.
➔ Confirmation Redirect URL: Send attendees to a specific page after booking.

[Upgrade your current Lifetime today!](#)

🏆 Powerful Automation & Monetization

➔ Auto-Generate Meeting Links with Google Meet, Zoom, or Microsoft Teams.
➔ Group & Package Bookings: Offer yoga classes, group coaching, workshops, and more in a single booking session.
➔ Paid Bookings: Monetize your time by charging for appointments directly through TidyCal. Stripe and PayPal supported.
➔ Export Booking & Attendee Data: Keep track of your bookings and attendees with easy CSV exports.

🏆 Premium Branding & Directory Access

➔ Reduced TidyCal Branding for a more professional look.
➔ Exclusive Directory Access for better visibility and engagement.

[Upgrade to Tier 2 Today!](#)

With TidyCal Agency, you get a robust and scalable booking solution designed to simplify scheduling for businesses of any size. No subscriptions, no hidden fees—just a one-time payment for a lifetime of hassle-free booking.

🔗 **Need help upgrading? [Check out this guide](#)**

Next step: **[Setting up Teams](#)**

Setting Up Teams

Setting Up a Team in TidyCal

TidyCal's Team feature is designed for businesses and organizations that need a shared scheduling system.

Whether you manage a sales team, run a consulting firm, or coordinate client meetings across multiple professionals, teams allow you to centralize bookings while maintaining flexibility for each member.

If you're unsure whether a team setup is right for you, reach out to Support@TidyCal.com for guidance before making an investment.

TidyCal's Team feature makes it easy to manage bookings across multiple people while keeping everything in one place. Whether you need fair appointment distribution, multi-host meetings, or a branded team booking page, this feature ensures a smooth scheduling experience.

If you're considering a team setup, reach out to Support@TidyCal.com for assistance in determining whether it's the right fit for your business.

Setting up Teams

REQUIREMENT	AGENCY PLAN

Steps:

1. Log into TidyCal

2. Click Teams from the top menu

3. Click

4. Complete set up

5. Invite members into your team   Enter their TidyCal Email Address

6. Click Create Team

Your team is now set up and ready to manage bookings collaboratively!

Invite Members to your Team

◆ For Members **with TidyCal accounts:**
Click here to navigate to your Profile to view the email address you used in TidyCal

◆ For Members **without TidyCal accounts:**
Click here to register for an account.

Steps:

1. Click link: Add Member
2. Enter the member's email address on the Members' field.
3. Repeat additional members
4. Click button: Create Team

Helpful Tips

➔ If Team Invite is not received, please check your **Spam or Junk** folder

➔ Add Service@TidyCal.com as a contact in your mailbox to whitelist our email address.

➔ Avoid errors when accepting the Team Invite. Before clicking the invitation link:

◆ Ensure that you have an existing account in TidyCal.com **Register here**

◆ And ensure that you've logged off of your TidyCal account.

Resending Invites

Steps:

1. Log into TidyCal.com
2. Click [Teams](#) from the navigation bar
3. Look for the email address of the member in a team. The member-email would be labeled Pending.
4. Click Resend Invitation

Removing members

Steps:

1. Log into TidyCal
2. Click **Teams**
3. Look for the member
4. Click Edit to enter the team booking type settings
5. Scroll down to **Members**
6. Click **Remove** next to the member's email address
7. Save changes.

Team-based Booking Types

The Agency Plan is designed to simplify team scheduling by providing flexible options that accommodate different appointment structures. Whether a meeting requires multiple hosts, an even distribution of bookings among team members, or the ability for clients to choose a specific person, TidyCal's advanced booking types ensure that scheduling works efficiently for both businesses and their clients. The Agency Plan provides access to three powerful team-based booking types:

Collective Meeting Booking Type

A Collective Meeting is perfect for multi-host meetings, where multiple members of the team can meet with a client all at the same time. A great example of this is when a website owner needs help with ranking their website on search engines.

A meeting with the SEO and Content Strategy Team can have a few key people. This may include a Content Specialist. It can also include an SEO Strategist and a Technical Consultant. They can all join the same call with the client. This way, the client gets a complete strategy all at once. Each expert shares their ideas live, instead of through many meetings.

Availability depends on the free times of all chosen team members. A time slot shows up only when everyone is available at the same time.

Round Robin Meeting

Round Robin meetings are ideal for distributing bookings evenly across a team. TidyCal does not require all members to attend. It automatically assigns the booking to the first available team member. This can also be based on priority, depending on your setup.

This is perfect for customer support, sales calls, or onboarding sessions. The system dynamically checks availability across calendars and ensures only one member is booked per meeting, helping balance workloads while minimizing scheduling friction.

Recent update:
TidyCal no longer assigns bookings randomly to team members in a round robin booking session.

Now, TidyCal will evaluate the team members hosting a round robin booking calendar for their individual workload - that were sourced from round robin bookings. The team member with the lightest workload will be given priority.

Managed Meeting Booking Type

Managed Meetings provide agencies with a scalable method for implementing a standardized meeting type across multiple team members. Functioning as a template, this structure is replicated into each host's individual TidyCal account. While the core structure remains consistent, each team member is able to customize their version.

Customization options include altering the time zone, availability, or personal introductory text. These bookings are not displayed on the primary agency booking page; however, they are accessible via individual member booking type dashboards. This arrangement ensures a unique and independent experience for each agent or member while maintaining centralized control.

Attributes:

- Once the member has made edits to the Managed Booking Type, the agency owner will no longer be able to make changes to it. The only setting that the agency owner will retain is **enabling/disabling the member as a host** in the booking type.

- If a member is disabled as a host in the Managed Booking type, the member will no longer have the booking type in their collection.

Create a Collective Meeting Event

Steps:

1. Log into TidyCal

2. Click name of Team

3. Click button: Create new team Basic Settings

Basic Settings

1. Title:
   This is the header of the booking type

2. URL:
   Customizable string to make booking type easy to remember

3. Description:
   A short summary explaining the booking type

4. Select a calendar to add these bookings:
   Choose your preferred meeting platform: Zoom, Google Meet, Microsoft Teams, or a static link.

5. Video conference links
   Select preference if meeting via Zoom, Google Meet, MS-Teams, or Static links

6. Phone numbers
   Provide phone number that bookers can call during the meeting

7. Custom meeting locations/details
   Manually enter a location or instructions for attendees.

8. Location name (visible before booking):
   The meeting location shown to bookers before they confirm

9. Location details (visible after booking):
   Additional location details provided after booking

10. Enable custom confirmation redirect page
    Send attendees to a custom URL after booking.

11. Charge for this booking
    Require payment before confirming an appointment.
    Only Stripe and PayPal are supported

Team Settings

1. Select hosts
   Choose team members of the Subgroup who will be part of this booking type.
   Example: Marketing Cluster (SEO, Social Media, Content Strategy), or Design Pod
   (Graphics, Motion, UX/UI), or Finance Division (Comptroller, Accountant,
   Bookkeeper)
2. Disable Round robin
   Aims to require all members to participate in the meeting

Booking duration and intervals

1. Booking duration
   The length of each appointment.
2. Interval between available times
   The time gap between bookable slots.
3. Minimum padding between bookings
   Extra buffer time before or after an appointment.

Your availability

1. Choose whether to use Global Availability or define own availability
2. Enable "Use global availability"
   If looking to apply default availability settings for all booking type
3. Set Weekly schedule or Specific Dates
   Define daily schedule every week or for specific dates only
4. Availability restrictions
   a. How far out can users book?
      Set the maximum number of days in advance someone can book.
   b. Bookers can't schedule within
      Prevent last-minute bookings by setting a block period.
   c. Set maximum bookings
      Limit the total number of bookings per day, week, or month.

      d. Require approval
           Manually confirm or deny booking requests before they are finalized
           Payments for charged bookings will be collected prior to user approval

5. Enable package or recurring bookings
   Allow attendees to book multiple sessions at once.

Group bookings

1. Enable group bookings for more than one attendee
   Let multiple people join the same booking.
2. Enable guest invites
   Allow attendees to invite others to join the meeting.

Questions to invitees

1. Click Add new questions
   Collect extra details from attendees by adding custom questions.

2. Custom email reminders
   Edit and schedule email notifications for attendees.

3. Booking privacy
       a. Enable private mode
           Hide this booking type from public access; only accessible via direct link
           Won't display on booking pages
       b. Display on Booking Types Directory
           Make this booking type publicly discoverable in the directory.

4. Save booking type

Organize a Round Robin Event

Steps:

1. Log into TidyCal

2. Click name of Team

3. Click button: **Create new team Basic Settings**

Basic Settings

1. Title:
   This is the header of the booking type

2. URL:
   Customizable string to make booking type easy to remember

3. Description:
   A short summary explaining the booking type

4. Select a calendar to add these bookings:
   Choose which connected calendar will store new bookings

5. Video conference links
   Choose your preferred meeting platform: Zoom, Google Meet, Microsoft Teams, or a static link.

6. Phone numbers
   Provide phone number that bookers can call during the meeting

7. Custom meeting locations/details
   Manually enter a location or instructions for attendees.
   a. Location name (visible before booking):
      The meeting location shown to bookers before they confirm
   b. Location details (visible after booking):
      Additional location details provided after booking

8. Enable custom confirmation redirect page
   Send attendees to a custom URL after booking.

9. Charge for this booking
   Require payment before confirming an appointment.
   Only Stripe and PayPal are supported

Team Settings

1. Select hosts
   Choose team members of the Subgroup who will be part of this booking type. Example: Marketing Cluster (SEO, Social Media, Content Strategy), or Design Pod (Graphics, Motion, UX/UI), or Finance Division (Comptroller, Accountant, Bookkeeper)
2. Enable round robin
   Aims to require all members to participate in the meeting and fairly distribute workload

Booking duration and intervals

1. Booking duration
   The length of each appointment.
2. Interval between available times
   The time gap between bookable slots.
3. Minimum padding between bookings
   Extra buffer time before or after an appointment.
4. Set Weekly schedule or Specific Dates
   Define daily schedule every week or for specific dates only

5. Availability restrictions

   a. How far out can users book?
      Set the maximum number of days in advance someone can book.

   b. Bookers can't schedule within
      Prevent last-minute bookings by setting a block period.

   c. Set maximum bookings
      Limit the total number of bookings per day, week, or month.

   d. Require approval
      Manually confirm or deny booking requests before they are finalized
      Payments for charged bookings will be collected prior to user approval

6. Enable package or recurring bookings
   Allow attendees to book multiple sessions at once.

Group bookings

1. Enable group bookings for more than one attendee
   Let multiple people join the same booking.

2. Enable guest invites
   Allow attendees to invite others to join the meeting.

Questions to invitees

1. Click Add new questions
   Collect extra details from attendees by adding custom questions.

2. Custom email reminders
   Edit and schedule email notifications for attendees.

3. Booking privacy

   a. Enable private mode
      Hide this booking type from public access; only accessible via direct link
      Won't display on booking pages

   b. Display on Booking Types Directory
      Make this booking type publicly discoverable in the directory.

4. Save booking type

Managed Booking Type

Steps:

1. Log into TidyCal

2. Click name of Team

3. Click button: **Create new team**

Basic Settings

4. Title:
   This is the header of the booking type

5. URL:
   Customizable string to make booking type easy to remember

6. Description:
   A short summary explaining the booking type

7. Select a calendar to add these bookings:
   Choose your preferred meeting platform: Zoom, Google Meet, Microsoft Teams, or a static link.

8. Video conference links
   Select preference if meeting via Zoom, Google Meet, MS-Teams, or Static links

9. Phone numbers
   Provide phone number that bookers can call during the meeting

10. Custom meeting locations/details
    Manually enter a location or instructions for attendees.
    a. Location name (visible before booking):
       The meeting location shown to bookers before they confirm
    b. Location details (visible after booking):
       Additional location details provided after booking

11. Enable custom confirmation redirect page
    Send attendees to a custom URL after booking.

12. Charge for this booking
Require payment before confirming an appointment.
Only Stripe and PayPal are supported

Team Settings

13. Select hosts
Choose team members of the Subgroup who will be part of this booking type.
Example: Marketing Cluster (SEO, Social Media, Content Strategy), or Design Pod (Graphics, Motion, UX/UI), or Finance Division (Comptroller, Accountant, Bookkeeper)

14. Disable Round robin
Aims to require all members to participate in the meeting

Booking duration and intervals

15. Booking duration
The length of each appointment.

16. Interval between available times
The time gap between bookable slots.

17. Minimum padding between bookings
Extra buffer time before or after an appointment.

18. Set Weekly schedule or Specific Dates
Define daily schedule every week or for specific dates only

19. Availability restrictions

    a. How far out can users book?
    Set the maximum number of days in advance someone can book.

    b. Bookers can't schedule within
    Prevent last-minute bookings by setting a block period.

     c. Set maximum bookings
         Limit the total number of bookings per day, week, or month.

     d. Require approval
         Manually confirm or deny booking requests before they are finalized
         Payments for charged bookings will be collected prior to user approval

20. Enable package or recurring bookings
    Allow attendees to book multiple sessions at once.

Group bookings

21. Enable group bookings for more than one attendee
    Let multiple people join the same booking.

22. Enable guest invites
    Allow attendees to invite others to join the meeting.

Questions to invitees

23. Click Add new questions
    Collect extra details from attendees by adding custom questions.

24. Custom email reminders
    Edit and schedule email notifications for attendees.

25. Booking privacy

     a. Enable private mode
         Hide this booking type from public access; only accessible via direct link
         Won't display on booking pages

     b. Display on Booking Types Directory
         Make this booking type publicly discoverable in the directory.

26. Save booking type

FAQ : Teams

Q: My company is on the Agency Plan. Why am I being asked to upgrade?

A: Being added to a Team does not upgrade your account or unlock any Pro features. Licenses in TidyCal are tied to each individual user, so only those who personally hold a Tier 2 (Agency Plan) license will have access to Agency-level features. Team members do not inherit the privileges of the Team Owner's license.

Additionally, even if a team member has their own Agency Plan, they will not have access to your account—TidyCal accounts are private and can only be accessed by their respective owners.

Q: As an agency owner, how can I view my members' calendars to determine their availability?

For privacy and security reasons, TidyCal does not permit agency plan users to access members' calendars or vice versa. There is no possible way for you to view other users' calendars. It is recommended to communicate with your members and agree upon a default time-block that you will set.

Q: Our team booking type requires approval. As the agency owner but not the host, how is the booking approved or rejected?

A: Both the assigned host and the agency owner can approve or reject bookings that are set to require manual approval. To do this, go to the Bookings page in your TidyCal dashboard, click on the booking in question, and manage the status from the booking details panel.

Q: I invited a team member and they accepted the invite, but their status still shows as "Pending" and isn't clickable. What's wrong?

A: This usually happens when the invited member clicks the invitation link while logged into the wrong TidyCal account—or not logged in at all. To fix this, ask the member to:

1. Log out of any existing TidyCal session, then log in using the correct email address where the invite was sent.

2. Click the invitation link again from their inbox to complete the team connection.

If needed, you can also go to the Teams page and resend the invite to ensure they receive a fresh link.

Q: I'm getting a broken or non-clickable URL on a managed booking type I created. How can I fix it?

A: This usually happens when you're viewing the booking type from the Team's booking dashboard instead of your Personal Booking Types dashboard. To fix this:

1. Make sure you are one of the assigned hosts for the managed booking.

2. Navigate to your Personal Booking Types section.

3. There, you'll be able to edit the booking type and see the correct URL, which should now be clickable and functional.

Q: All of my team members are available, but our collective team booking type still shows no available dates. Why?

A: Collective booking types require all assigned hosts to be available at the same time. TidyCal checks each host's read-enabled external calendar under their own TidyCal integration settings. As the agency owner, you won't have visibility into your team's external calendar events unless you're logged into their accounts.

If no dates are showing, this means that there are no time slots where all hosts are simultaneously free.

👉 **Tip:** If you'd like the system to offer available times even if only some hosts are available, consider using a Round Robin booking type instead. This allows TidyCal to assign bookings to any available host, rather than requiring availability across all.

Q: I upgraded my license to the Agency Plan, but my account still shows the old license. I also got an error when activating a new Tier 1 (Individual) license on my existing Tier 1 account. What went wrong?

A: TidyCal does **not support license stacking**, meaning you cannot apply a new Tier 1 license on top of an existing Tier 1 license, nor will this upgrade you to the Agency Plan (Tier 2). This is likely why you encountered an error.

To properly upgrade your license, follow the steps outlined here:

👉 **How to Upgrade or Downgrade Your License**

If the new Tier 1 license isn't going to be used, you may request a refund by following these instructions:

👉 **How to Request a Refund**

Important: If your purchase was made using a discount or coupon, only the **amount paid** will be refunded. The value of any discount or coupon will **not** be refunded, and these cannot be reissued or reactivated once used.

Learn more here: 👉 **Coupons and Discounts Policy**

Q: Do Collective or Round Robin Booking Types function if only one member is hosting?

A: Yes, they do. Their functionality remains consistent, with the distinction that for Collective bookings, no additional members will participate alongside the host. For Round Robin bookings, the sole host will be the exclusive recipient of all bookings.

Q: TidyCal is not taking into consideration the member's calendar events.

A: Two of the most typical scenarios are:

1. **The member has not enabled a calendar for reading.** TidyCal checks read-enabled calendars for conflicts.
2. **The member's TidyCal email address is different from their integrated calendar's.** In this case, the integrated calendar has to grant View and Edit permissions to the Email Address of their TidyCal account.

   Here are guides for different platforms:
   a. [Google Calendars](#)
   b. [Microsoft 365](#)
   c. [iCloud Accounts](#)

If the case does not fall under these scenarios, it would be best to email Support@TidyCal.com for further assistance. Provide the user's TidyCal email address.

A Collective Meeting facilitates multi-host interactions, allowing multiple team members to meet with a client simultaneously. For instance, a website owner needing search engine optimization (SEO) assistance could benefit from such a meeting.

Specifically, a meeting with the SEO and Content Strategy Team might include a Content Specialist, an SEO Strategist, and a Technical Consultant. All these experts can join a single call with the client, offering a comprehensive strategy in one session. This eliminates the need for separate meetings by enabling each expert to provide real-time insights.

Scheduling these meetings depends on the shared availability of all selected team members; a time slot will only be offered when all participants are simultaneously free.

Team Booking Types

Team-based Booking Types

The Agency Plan is designed to simplify team scheduling by providing flexible options that accommodate different appointment structures. Whether a meeting requires multiple hosts, an even distribution of bookings among team members, or the ability for clients to choose a specific person, TidyCal's advanced booking types ensure that scheduling works efficiently for both businesses and their clients. The Agency Plan provides access to three powerful team-based booking types:

Collective Meeting Booking Type

A Collective Meeting is perfect for multi-host meetings, where multiple members of the team can meet with a client all at the same time. A great example of this is when a website owner needs help with ranking their website on search engines.

A meeting with the SEO and Content Strategy Team can have a few key people. This may include a Content Specialist. It can also include an SEO Strategist and a Technical Consultant. They can all join the same call with the client. This way, the client gets a complete strategy all at once. Each expert shares their ideas live, instead of through many meetings.

Availability depends on the free times of all chosen team members. A time slot shows up only when everyone is available at the same time.

Round Robin Meeting

Round Robin meetings are ideal for distributing bookings evenly across a team. TidyCal does not require all members to attend. It automatically assigns the booking to the first available team member. This can also be based on priority, depending on your setup.

This is perfect for customer support, sales calls, or onboarding sessions. The system dynamically checks availability across calendars and ensures only one member is booked per meeting, helping balance workloads while minimizing scheduling friction.

Recent update:
TidyCal no longer assigns bookings randomly to team members in a round robin booking session.

Now, TidyCal will evaluate the team members hosting a round robin booking calendar for their individual workload - that were sourced from round robin bookings. The team member with the lightest workload will be given priority.

Managed Meeting Booking Type

Managed Meetings offer a scalable way for agencies to deploy a standardized meeting type across multiple team members. Think of it as a template — once created, it gets replicated into each host's individual TidyCal account. Each team member can customize their version.

They can change the time zone, availability, or personal intro text. However, the core structure stays the same.

These bookings do not appear on the main agency booking page. However, they can be accessed through individual member links. This gives each agent a unique and independent experience while keeping centralized control.

Create a Collective Meeting Event

Steps:

1. Log into TidyCal

2. Click name of Team

3. Click button: Create new team Basic Settings

Basic Settings

4. Title:
   This is the header of the booking type

5. URL:
   Customizable string to make booking type easy to remember

6. Description:
   A short summary explaining the booking type

7. Select a calendar to add these bookings:
   Choose your preferred meeting platform: Zoom, Google Meet, Microsoft Teams, or a static link.

8. Video conference links
   Select preference if meeting via Zoom, Google Meet, MS-Teams, or Static links

9. Phone numbers
   Provide phone number that bookers can call during the meeting

10. Custom meeting locations/details
    Manually enter a location or instructions for attendees.
    a. Location name (visible before booking):
       The meeting location shown to bookers before they confirm

      b.   Location details (visible after booking):
             Additional location details provided after booking
11. Enable custom confirmation redirect page
    Send attendees to a custom URL after booking.
12. Charge for this booking
    Require payment before confirming an appointment.
    Only Stripe and PayPal are supported

Team Settings

13. Select hosts
    Choose team members of the Subgroup who will be part of this booking type.
    Example: Marketing Cluster (SEO, Social Media, Content Strategy), or Design Pod
    (Graphics, Motion, UX/UI), or Finance Division (Comptroller, Accountant,
    Bookkeeper)
14. Disable Round robin
    Aims to require all members to participate in the meeting

Booking duration and intervals

15. Booking duration
    The length of each appointment.
16. Interval between available times
    The time gap between bookable slots.
17. Minimum padding between bookings
    Extra buffer time before or after an appointment.

Your availability

18. Choose whether to use Global Availability or define own availability
19. Enable "Use global availability"
    If looking to apply default availability settings for all booking type

20. Set Weekly schedule or Specific Dates
    Define daily schedule every week or for specific dates only
21. Availability restrictions
    a. How far out can users book?
        Set the maximum number of days in advance someone can book.
    b. Bookers can't schedule within
        Prevent last-minute bookings by setting a block period.
    c. Set maximum bookings
        Limit the total number of bookings per day, week, or month.
    d. Require approval
        Manually confirm or deny booking requests before they are finalized
        Payments for charged bookings will be collected prior to user approval
22. Enable package or recurring bookings
    Allow attendees to book multiple sessions at once.

Group bookings

23. Enable group bookings for more than one attendee
    Let multiple people join the same booking.
24. Enable guest invites
    Allow attendees to invite others to join the meeting.

Questions to invitees

25. Click Add new questions
    Collect extra details from attendees by adding custom questions.

26. Custom email reminders
    Edit and schedule email notifications for attendees.

27. Booking privacy
    a. Enable private mode
        Hide this booking type from public access; only accessible via direct link
        Won't display on booking pages

    b.   Display on Booking Types Directory
        Make this booking type publicly discoverable in the directory.

28. Save booking type

Organize a Round Robin Event

Steps:

29. Log into TidyCal

30. Click name of Team

31. Click button: **Create new team Basic Settings**

Basic Settings

32. Title:
This is the header of the booking type

33. URL:
Customizable string to make booking type easy to remember

34. Description:
A short summary explaining the booking type

35. Select a calendar to add these bookings:
Choose which connected calendar will store new bookings

36. Video conference links
Choose your preferred meeting platform: Zoom, Google Meet, Microsoft Teams, or a static link.

37. Phone numbers
Provide phone number that bookers can call during the meeting

38. Custom meeting locations/details
Manually enter a location or instructions for attendees.
    a. Location name (visible before booking):
    The meeting location shown to bookers before they confirm
    b. Location details (visible after booking):
    Additional location details provided after booking

39. Enable custom confirmation redirect page
Send attendees to a custom URL after booking.
40. Charge for this booking
Require payment before confirming an appointment.
Only Stripe and PayPal are supported

Team Settings

41. Select hosts
Choose team members of the Subgroup who will be part of this booking type.
Example: Marketing Cluster (SEO, Social Media, Content Strategy), or Design Pod
(Graphics, Motion, UX/UI), or Finance Division (Comptroller, Accountant,
Bookkeeper)
42. Enable round robin
Aims to require all members to participate in the meeting and fairly distribute
workload

Booking duration and intervals

43. Booking duration
The length of each appointment.
44. Interval between available times
The time gap between bookable slots.
45. Minimum padding between bookings
Extra buffer time before or after an appointment.
46. Set Weekly schedule or Specific Dates
Define daily schedule every week or for specific dates only
47. Availability restrictions
    a. How far out can users book?
       Set the maximum number of days in advance someone can book.
    b. Bookers can't schedule within
       Prevent last-minute bookings by setting a block period.

  c. Set maximum bookings
   Limit the total number of bookings per day, week, or month.
  d. Require approval
   Manually confirm or deny booking requests before they are finalized
   Payments for charged bookings will be collected prior to user approval

48. Enable package or recurring bookings
 Allow attendees to book multiple sessions at once.

Group bookings

49. Enable group bookings for more than one attendee
 Let multiple people join the same booking.
50. Enable guest invites
 Allow attendees to invite others to join the meeting.

Questions to invitees

51. Click Add new questions
 Collect extra details from attendees by adding custom questions.

52. Custom email reminders
 Edit and schedule email notifications for attendees.
53. Booking privacy
  a. Enable private mode
   Hide this booking type from public access; only accessible via direct link
   Won't display on booking pages
  b. Display on Booking Types Directory
   Make this booking type publicly discoverable in the directory.

54. Save booking type

Managed Booking Type

Steps:

1. Log into TidyCal

2. Click name of Team

3. Click button: **Create new team Basic Settings**

Basic Settings

4. Title:
   This is the header of the booking type

5. URL:
   Customizable string to make booking type easy to remember

6. Description:
   A short summary explaining the booking type

7. Select a calendar to add these bookings:
   Choose your preferred meeting platform: Zoom, Google Meet, Microsoft Teams, or a static link.
8. Video conference links
   Select preference if meeting via Zoom, Google Meet, MS-Teams, or Static links
9. Phone numbers
   Provide phone number that bookers can call during the meeting
10. Custom meeting locations/details
    Manually enter a location or instructions for attendees.
    a. Location name (visible before booking):
       The meeting location shown to bookers before they confirm

      b. Location details (visible after booking):
          Additional location details provided after booking

11. Enable custom confirmation redirect page
    Send attendees to a custom URL after booking.

12. Charge for this booking
    Require payment before confirming an appointment.
    Only Stripe and PayPal are supported

Team Settings

13. Select hosts
    Choose team members of the Subgroup who will be part of this booking type.
    Example: Marketing Cluster (SEO, Social Media, Content Strategy), or Design Pod
    (Graphics, Motion, UX/UI), or Finance Division (Comptroller, Accountant,
    Bookkeeper)

14. Disable Round robin
    Aims to require all members to participate in the meeting

Booking duration and intervals

15. Booking duration
    The length of each appointment.

16. Interval between available times
    The time gap between bookable slots.

17. Minimum padding between bookings
    Extra buffer time before or after an appointment.

18. Set Weekly schedule or Specific Dates
    Define daily schedule every week or for specific dates only

19. Availability restrictions
      a. How far out can users book?
          Set the maximum number of days in advance someone can book.

        b. Bookers can't schedule within
            Prevent last-minute bookings by setting a block period.
        c. Set maximum bookings
            Limit the total number of bookings per day, week, or month.
        d. Require approval
            Manually confirm or deny booking requests before they are finalized
            Payments for charged bookings will be collected prior to user approval

20. Enable package or recurring bookings
    Allow attendees to book multiple sessions at once.

Group bookings

21. Enable group bookings for more than one attendee
    Let multiple people join the same booking.
22. Enable guest invites
    Allow attendees to invite others to join the meeting.

Questions to invitees

23. Click Add new questions
    Collect extra details from attendees by adding custom questions.

24. Custom email reminders
    Edit and schedule email notifications for attendees.
25. Booking privacy
        a. Enable private mode
            Hide this booking type from public access; only accessible via direct link
            Won't display on booking pages
        b. Display on Booking Types Directory
            Make this booking type publicly discoverable in the directory.

26. Save booking type

FAQ

FAQ : Teams

Q: My company is on the Agency Plan. Why am I being asked to upgrade?

A:: Being added to a Team does not upgrade your account or unlock any Pro features. Licenses in TidyCal are tied to each individual user, so only those who personally hold a Tier 2 (Agency Plan) license will have access to Agency-level features. Team members do not inherit the privileges of the Team Owner's license.

Additionally, even if a team member has their own Agency Plan, they will not have access to your account—TidyCal accounts are private and can only be accessed by their respective owners.

Q: Our team booking type requires approval. As the agency owner but not the host, how is the booking approved or rejected?

A: Both the assigned host and the agency owner can approve or reject bookings that are set to require manual approval. To do this, go to the Bookings page in your TidyCal dashboard, click on the booking in question, and manage the status from the booking details panel.

Q: I invited a team member and they accepted the invite, but their status still shows as "Pending" and isn't clickable. What's wrong?

A: This usually happens when the invited member clicks the invitation link while logged into the wrong TidyCal account—or not logged in at all. To fix this, ask the member to:

1. Log out of any existing TidyCal session, then log in using the correct email address where the invite was sent.

2. Click the invitation link again from their inbox to complete the team connection.

If needed, you can also go to the Teams page and resend the invite to ensure they receive a fresh link.

Q: I'm getting a broken or non-clickable URL on a managed booking type I created. How can I fix it?

A: This usually happens when you're viewing the booking type from the Team's booking dashboard instead of your Personal Booking Types dashboard. To fix this:

1. Make sure you are one of the assigned hosts for the managed booking.

2. Navigate to your Personal Booking Types section.

3. There, you'll be able to edit the booking type and see the correct URL, which should now be clickable and functional.

Q: All of my team members are available, but our collective team booking type still shows no available dates. Why?

A: Collective booking types require all assigned hosts to be available at the same time. TidyCal checks each host's read-enabled external calendar under their own TidyCal integration settings. As the agency owner, you won't have visibility into your team's external calendar events unless you're logged into their accounts.

If no dates are showing, this means that there are no time slots where all hosts are simultaneously free.

👉 **Tip:** If you'd like the system to offer available times even if only some hosts are available, consider using a Round Robin booking type instead. This allows TidyCal to assign bookings to any available host, rather than requiring availability across all.

Q: I upgraded my license to the Agency Plan, but my account still shows the old license. I also got an error when activating a new Tier 1 (Individual) license on my existing Tier 1 account. What went wrong?

A: TidyCal does **not support license stacking**, meaning you cannot apply a new Tier 1 license on top of an existing Tier 1 license, nor will this upgrade you to the Agency Plan (Tier 2). This is likely why you encountered an error.

To properly upgrade your license, follow the steps outlined here:

👉 **How to Upgrade or Downgrade Your License**

If the new Tier 1 license isn't going to be used, you may request a refund by following these instructions:

👉 **How to Request a Refund**

Important: If your purchase was made using a discount or coupon, only the **amount paid** will be refunded. The value of any discount or coupon will **not** be refunded, and these cannot be reissued or reactivated once used.

Learn more here: 👉 **Coupons and Discounts Policy**

OPTION 1	OPTION 2
SWAP EMAIL addresses of two accounts	**UPGRADE Old account, REFUND new purchase**
Will not save you money	Upgrading the old account: You will get a special upgrade price Agency Plan price (less) the Value of old license = Upgrade Price $79.00 - $29.00 = **$59.00**
Here's how: Just let me know, I'll do it for you.	Here's how: **Upgrade:** 👉 **How to upgrade your license** **Refund the new License you purchased.** 👉 **Request a refund** - I confirmed with Billing if I could do a refund for you and they OK'd it. Just need you to confirm.

VIDEO PRODUCTION

SEO

"TidyCal Teams Setup Guide (2025) | Collective, Round Robin, and Managed Booking Types Explained"

Unlock the full potential of your team with TidyCal's Agency Plan. In this video, we walk you through setting up Teams, creating booking types like Collective, Round Robin, and Managed Meetings, and show how external calendars are used to avoid scheduling conflicts. Perfect for agencies, consultants, and remote teams!

Tags

TidyCal, TidyCal Teams, TidyCal Agency Plan, TidyCal Collective Booking, TidyCal Round Robin, TidyCal Managed Booking, Scheduling Software, Appointment Booking, Team Scheduling Tools, Calendly alternative, Freelancer tools, Client scheduling app

Hashtags

#TidyCal #AppointmentScheduling #TeamBooking #FreelancerTools #CalendlyAlternative #RemoteWorkTools

VOICE OVER SCRIPT

Imagine this — you've got three team members in different time zones, two clients needing the same slot, and your inbox flooded with "Are you free on Tuesday?" emails.

Keeping everyone aligned shouldn't feel like a full-time job. That's where TidyCal Teams steps in.

Before we dive in, go ahead and tap like, hit subscribe, and share this with your team.

You'll want this on-hand when it's time to set things up.

TidyCal's Agency Plan lets you coordinate meetings across multiple members with ease.

Whether you want everyone on the same call, rotate bookings fairly, or give each teammate their own personalized link — you've got full flexibility without the chaos.

When you create a Team under the Agency Plan, each member can be added to shared booking types. TidyCal handles how bookings are routed based on the type you choose.

Every booking type respects the availability of each assigned host.

TidyCal automatically checks the external calendars that members have connected and read-enabled — so if someone's calendar is blocked, that time slot is excluded.

To get started, log into your TidyCal account.

Click Teams in the top menu.

Click Create Team, add your team's name, and invite your members.

Make sure each invitee is logged into the email they use on TidyCal before accepting the invite.

Use Collective Booking when you want multiple team members in the same call with the client — like a strategy session with your content, SEO, and tech team.

TidyCal will only show available time slots when all assigned members are free.

To create one, go to your Team, click Create Booking Type, select hosts, disable Round Robin, and configure time slots, location, and availability.

Save it — and that's it.

Round Robin is perfect for distributing bookings across the team — like for onboarding or customer support.

TidyCal automatically assigns bookings based on workload. The team member with the lightest Round Robin load gets priority.

To set it up, head to your Team, create a new Booking Type, enable Round Robin, assign your hosts, set your availability, meeting link, and any rules. Then just hit save.

Managed Booking works like a reusable template. The owner creates one booking type, and TidyCal copies it to each team member's account.

Each member can personalize it. They get their own booking link, personalized availability, and branding — but the structure stays aligned with the team's goals.

To set it up, create the team booking, assign members, and TidyCal handles the distribution. They'll see it inside their own dashboards to customize from there.

Let's go over some common questions from actual users.

Question: Why am I asked to upgrade if I already joined a team?

Answer: Licenses are tied to individual accounts. Only accounts with a Tier 2 license will unlock all Agency Plan features.

Question: Our bookings need approval — who handles it?

Answer: Both the assigned host and the agency owner can approve or reject bookings.

Question: My invite was accepted, but still says "Pending."

Answer: Make sure the invite was accepted while logged into the right account. If not, log in again and click the invite link.

Question: My managed booking link is broken.

Answer: Check your Personal Booking Types page instead of the Team dashboard. The correct link will be clickable there.

Question: Why does my Collective Booking show no availability?

Answer: All assigned hosts must be free at the same time. TidyCal checks each member's external calendar to confirm this.

If you need flexibility, use Round Robin instead.

If you have questions, drop a comment below or email us at Originals@AppSumo.com.

Thanks for watching. I'll see you in the next one.

Copy by Gemini

Streamline Your Scheduling:
A Complete Guide to TidyCal Teams

Managing appointments for a team can be complex, but with TidyCal's Teams feature, you can centralize bookings and simplify your scheduling process. Designed for efficiency and flexibility, TidyCal Teams is perfect for businesses, agencies, and individual professionals looking to coordinate meetings seamlessly. This guide will walk you through setting up and utilizing the Teams feature to its full potential, helping you reduce support inquiries, boost team adoption, and enhance TidyCal's presence in the market.

What are TidyCal Teams?

TidyCal's Team feature is built for businesses and organizations that need a shared scheduling system. Whether you manage a sales team, run a consulting firm, or coordinate client meetings across multiple professionals, teams allow you to centralize bookings while maintaining flexibility for each member. It makes it easy to manage bookings across multiple people while keeping everything in one place.

Key benefits of using TidyCal Teams include:

- Centralized Bookings: Keep all your team's appointments organized in one accessible location.
- Flexibility for Each Member: Individual team members retain control over their specific availability and settings.
- Fair Appointment Distribution: Easily distribute bookings evenly among team members.
- Multi-Host Meetings: Coordinate meetings where multiple team members meet with a client simultaneously.
- Branded Team Booking Pages: Present a professional and consistent booking experience for your clients.

If you're considering a team setup, you can always reach out to Support@TidyCal.com for assistance in determining if it's the right fit for your business.

Setting Up a Team in TidyCal (Agency Plan Requirement)

The Teams feature is available with the TidyCal Agency Plan.

Steps to Set Up Your Team:

1. Log into your TidyCal account.
2. Click Teams from the top menu.
3. Click the "Create new team" button (represented by a "+" icon).
4. Complete the setup details for your team.
5. Invite members to your team by entering their TidyCal Email Address.
6. Click Create Team.

Your team is now set up and ready to manage bookings collaboratively!

Inviting Members to Your Team:

After setting up your team, you'll want to invite your members.

1. Click the Add Member link.
2. Enter the member's email address in the Members' field.
3. Repeat for additional members.
4. Click the Create Team button.

Helpful Tips for Inviting Members:

- For Members with Existing TidyCal Accounts: Instruct them to view the email address they used in TidyCal by navigating to their Profile.
- For Members without TidyCal Accounts: They will need to register for an account.
- Check Spam/Junk Folder: If a team invite isn't received, advise members to check their Spam or Junk folder.
- Whitelist Our Email: Ask members to add Service@TidyCal.com as a contact in their mailbox to whitelist TidyCal emails.
- Avoid Errors When Accepting: Before clicking the invitation link, members should ensure they have an existing TidyCal.com account and are logged off their TidyCal account.

Resending Invites:

If a member's status still shows as "Pending" or if they didn't receive the invite, you can resend it:

1. Log into TidyCal.com.
2. Click Teams from the navigation bar.
3. Locate the email address of the member in the team; it will be labeled Pending.

4. Click Resend Invitation.

Removing Members:

Should you need to remove a member from your team:

1. Log into TidyCal.
2. Click Teams.
3. Locate the member you wish to remove.
4. Click Edit to enter the team booking type settings.
5. Scroll down to Members.
6. Click Remove next to the member's email address.
7. Save changes.

Understanding Team-Based Booking Types

The Agency Plan is designed to simplify team scheduling by providing flexible options that accommodate different appointment structures. TidyCal's advanced booking types ensure that scheduling works efficiently for both businesses and their clients. The Agency Plan provides access to three powerful team-based booking types:

1. Collective Meeting Booking Type

A Collective Meeting is ideal for multi-host meetings where multiple members of the team can meet with a client all at the same time. For example, if a website owner needs help ranking their website, a meeting with an SEO, Content Specialist, and Technical Consultant can provide a complete strategy at once, with each expert sharing ideas live. Availability for a Collective Meeting depends on the free times of *all chosen team members*, meaning a time slot only appears when everyone is available simultaneously.

How to Create a Collective Meeting Event:

1. Log into TidyCal.
2. Click the name of your Team.
3. Click the Create new team Basic Settings button.
4. Basic Settings:
   - Title: This will be the header of the booking type.
   - URL: Customize a string to make the booking type easy to remember.
   - Description: Provide a short summary explaining the booking type.
   - Select a calendar to add these bookings: Choose your preferred meeting platform (Zoom, Google Meet, Microsoft Teams, or a static link).

- Video conference links: Select your preference for meeting via Zoom, Google Meet, MS-Teams, or Static links.
- Phone numbers: Provide a phone number for bookers to call during the meeting.
- Custom meeting locations/details: Manually enter a location or instructions.
  - Location name (visible before booking): The meeting location shown to bookers before they confirm.
  - Location details (visible after booking): Additional location details provided after booking.
- Enable custom confirmation redirect page: Send attendees to a custom URL after booking.
- Charge for this booking: Require payment before confirming an appointment (Stripe and PayPal are supported).

5. Team Settings:
   - Select hosts: Choose team members who will be part of this booking type.
   - Disable Round robin: Enable this to require all selected members to participate in the meeting.

6. Booking duration and intervals:
   - Booking duration: The length of each appointment.
   - Interval between available times: The time gap between bookable slots.
   - Minimum padding between bookings: Extra buffer time before or after an appointment.

7. Your availability:
   - Choose whether to use Global Availability or define your own availability.
   - Enable "Use global availability" if you want to apply default availability settings for all booking types.
   - Set Weekly schedule or Specific Dates to define daily schedules.
   - Availability restrictions:
     - How far out can users book?: Set the maximum number of days in advance someone can book.
     - Bookers can't schedule within: Prevent last-minute bookings by setting a block period.
     - Set maximum bookings: Limit the total number of bookings per day, week, or month.
     - Require approval: Manually confirm or deny booking requests before they are finalized. Payments for charged bookings will be collected prior to user approval.

8. Enable package or recurring bookings: Allow attendees to book multiple sessions at once.
9. Group bookings:
    ○ Enable group bookings for more than one attendee: Let multiple people join the same booking.
    ○ Enable guest invites: Allow attendees to invite others to join the meeting.
10. Questions to invitees: Click Add new questions to collect extra details from attendees.
11. Custom email reminders: Edit and schedule email notifications for attendees.
12. Booking privacy:
    ○ Enable private mode: Hide this booking type from public access; it will only be accessible via direct link and won't display on booking pages.
    ○ Display on Booking Types Directory: Make this booking type publicly discoverable in the directory.
13. Save booking type.

2. Round Robin Meeting Booking Type

Round Robin meetings are ideal for distributing bookings evenly across a team. TidyCal automatically assigns the booking to the first available team member, or it can be based on priority depending on your setup. This is perfect for customer support, sales calls, or onboarding sessions. The system dynamically checks availability across calendars and ensures only one member is booked per meeting, helping balance workloads while minimizing scheduling friction.

Recent Update: TidyCal no longer assigns bookings randomly in a round robin session. Instead, it evaluates the individual workload of team members from round robin bookings and gives priority to the team member with the lightest workload.

How to Organize a Round Robin Event:

1. Log into TidyCal.
2. Click the name of your Team.
3. Click the Create new team Basic Settings button.
4. Basic Settings:
    ○ Title: This will be the header of the booking type.
    ○ URL: Customize a string to make the booking type easy to remember.
    ○ Description: Provide a short summary explaining the booking type.
    ○ Select a calendar to add these bookings: Choose which connected calendar will store new bookings.

- Video conference links: Choose your preferred meeting platform (Zoom, Google Meet, Microsoft Teams, or a static link).
- Phone numbers: Provide a phone number for bookers to call during the meeting.
- Custom meeting locations/details: Manually enter a location or instructions.
  - Location name (visible before booking): The meeting location shown to bookers before they confirm.
  - Location details (visible after booking): Additional location details provided after booking.
- Enable custom confirmation redirect page: Send attendees to a custom URL after booking.
- Charge for this booking: Require payment before confirming an appointment (Stripe and PayPal are supported).

5. Team Settings:
   - Select hosts: Choose team members who will be part of this booking type.
   - Enable round robin: This option aims to fairly distribute workload among team members.
6. Booking duration and intervals:
   - Booking duration: The length of each appointment.
   - Interval between available times: The time gap between bookable slots.
   - Minimum padding between bookings: Extra buffer time before or after an appointment.
7. Your availability:
   - Set Weekly schedule or Specific Dates to define daily schedules.
   - Availability restrictions:
     - How far out can users book?: Set the maximum number of days in advance someone can book.
     - Bookers can't schedule within: Prevent last-minute bookings by setting a block period.
     - Set maximum bookings: Limit the total number of bookings per day, week, or month.
     - Require approval: Manually confirm or deny booking requests before they are finalized. Payments for charged bookings will be collected prior to user approval.
8. Enable package or recurring bookings: Allow attendees to book multiple sessions at once.
9. Group bookings:

- Enable group bookings for more than one attendee: Let multiple people join the same booking.
        - Enable guest invites: Allow attendees to invite others to join the meeting.
10. Questions to invitees: Click Add new questions to collect extra details from attendees.
11. Custom email reminders: Edit and schedule email notifications for attendees.
12. Booking privacy:
        - Enable private mode: Hide this booking type from public access; it will only be accessible via direct link and won't display on booking pages.
        - Display on Booking Types Directory: Make this booking type publicly discoverable in the directory.
13. Save booking type.

3. Managed Meeting Booking Type

Managed Meetings offer a scalable way for agencies to deploy a standardized meeting type across multiple team members. Think of it as a template: once created, it gets replicated into each host's individual TidyCal account. Each team member can customize their version by changing the time zone, availability, or personal intro text, while the core structure remains the same. These bookings do not appear on the main agency booking page but can be accessed through individual member links, providing each agent a unique and independent experience while maintaining centralized control.

How to Create a Managed Booking Type:

1. Log into TidyCal.
2. Click the name of your Team.
3. Click the Create new team Basic Settings button.
4. Basic Settings:
        - Title: This will be the header of the booking type.
        - URL: Customize a string to make the booking type easy to remember.
        - Description: Provide a short summary explaining the booking type.
        - Select a calendar to add these bookings: Choose your preferred meeting platform (Zoom, Google Meet, Microsoft Teams, or a static link).
        - Video conference links: Select your preference for meeting via Zoom, Google Meet, MS-Teams, or Static links.
        - Phone numbers: Provide a phone number for bookers to call during the meeting.
        - Custom meeting locations/details: Manually enter a location or instructions.

- - - ■ Location name (visible before booking): The meeting location shown to bookers before they confirm.
      - ■ Location details (visible after booking): Additional location details provided after booking.
    - ○ Enable custom confirmation redirect page: Send attendees to a custom URL after booking.
    - ○ Charge for this booking: Require payment before confirming an appointment (Stripe and PayPal are supported).
5. Team Settings:
    - ○ Select hosts: Choose team members who will be part of this booking type.
    - ○ Disable Round robin: This aims to require all selected members to participate in the meeting.
6. Booking duration and intervals:
    - ○ Booking duration: The length of each appointment.
    - ○ Interval between available times: The time gap between bookable slots.
    - ○ Minimum padding between bookings: Extra buffer time before or after an appointment.
7. Your availability:
    - ○ Set Weekly schedule or Specific Dates to define daily schedules.
    - ○ Availability restrictions:
      - ■ How far out can users book?: Set the maximum number of days in advance someone can book.
      - ■ Bookers can't schedule within: Prevent last-minute bookings by setting a block period.
      - ■ Set maximum bookings: Limit the total number of bookings per day, week, or month.
      - ■ Require approval: Manually confirm or deny booking requests before they are finalized. Payments for charged bookings will be collected prior to user approval.
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10. Questions to invitees: Click Add new questions to collect extra details from attendees.
11. Custom email reminders: Edit and schedule email notifications for attendees.
12. Booking privacy:

- ○ Enable private mode: Hide this booking type from public access; it will only be accessible via direct link and won't display on booking pages.
    - ○ Display on Booking Types Directory: Make this booking type publicly discoverable in the directory.
13. Save booking type.

Frequently Asked Questions (FAQ)

Q: My company is on the Agency Plan. Why am I being asked to upgrade?

A: Being added to a Team does not automatically upgrade your individual account or unlock any Pro features. Licenses in TidyCal are tied to each individual user, meaning only those who personally hold a Tier 2 (Agency Plan) license will have access to Agency-level features. Team members do not inherit the privileges of the Team Owner's license. Additionally, even if a team member has their own Agency Plan, they will not have access to your account, as TidyCal accounts are private and only accessible by their respective owners.

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A: Both the assigned host and the agency owner can approve or reject bookings that are set to require manual approval. To do this, go to the Bookings page in your TidyCal dashboard, click on the booking in question, and manage its status from the booking details panel.

Q: I invited a team member and they accepted the invite, but their status still shows as "Pending" and isn't clickable. What's wrong?

A: This usually occurs when the invited member clicks the invitation link while logged into the wrong TidyCal account or not logged in at all. To fix this, ask the member to:

1. Log out of any existing TidyCal session, then log in using the correct email address where the invite was sent.
2. Click the invitation link again from their inbox to complete the team connection. If needed, you can also go to the Teams page and resend the invite to ensure they receive a fresh link.

Q: I'm getting a broken or non-clickable URL on a managed booking type I created. How can I fix it?

A: This typically happens when you're viewing the booking type from the Team's booking dashboard instead of your Personal Booking Types dashboard. To fix this:

1. Make sure you are one of the assigned hosts for the managed booking.
2. Navigate to your Personal Booking Types section.
3. There, you'll be able to edit the booking type and see the correct URL, which should now be clickable and functional.

Q: All of my team members are available, but our collective team booking type still shows no available dates. Why?

A: Collective booking types require all assigned hosts to be available at the same time. TidyCal checks each host's read-enabled external calendar under their own TidyCal integration settings. As the agency owner, you won't have visibility into your team's external calendar events unless you're logged into their accounts. If no dates are showing, it means there are no time slots where all hosts are simultaneously free.

Tip: If you'd like the system to offer available times even if only some hosts are available, consider using a Round Robin booking type instead. This allows TidyCal to assign bookings to any available host, rather than requiring availability across all.

Q: I upgraded my license to the Agency Plan, but my account still shows the old license. I also got an error when activating a new Tier 1 (Individual) license on my existing Tier 1 account. What went wrong?

A: TidyCal does not support license stacking, meaning you cannot apply a new Tier 1 license on top of an existing Tier 1 license, nor will this upgrade you to the Agency Plan (Tier 2). This is likely why you encountered an error. To properly upgrade your license, please follow the steps outlined in our guide: How to Upgrade or Downgrade Your License.

If a new Tier 1 license isn't going to be used, you may request a refund by following these instructions: How to Request a Refund.

Important: If your purchase was made using a discount or coupon, only the amount paid will be refunded. The value of any discount or coupon will not be refunded, and these cannot be reissued or reactivated once used. Learn more here: Coupons and Discounts Policy.

Ready to Optimize Your Team's Scheduling?

TidyCal Teams is designed to bring efficiency and collaboration to your booking process. We encourage you to explore these powerful features and experience the difference.

If you have any further questions or require additional assistance, please don't hesitate to reach out to our support team. We're here to help you get the most out of TidyCal!

Update: Team Roles

Team Member Roles

⊙ Listen to this tab

Overview

In a TidyCal agency account, team roles define what each member can do. Assigning roles helps you manage permissions, keep booking types organized, and ensure smooth team collaboration. With the right role, your members can work within their own booking spaces while you keep control of overall TidyCal team management.

In TidyCal, the agency owner can assign two roles: User or Admin.

Types of Roles

User

- Standard TidyCal team role with no special privileges
- Can only manage their own booking types and booking page
- Access depends on their individual license (Free or Paid)

Admin

- A higher-level role with extended permissions in TidyCal
- Unlocks advanced agency account features such as creating team booking types and assigning hosts
- Permissions are still limited by their active license (Free or Individual plan)

Admin Role Features

Admins gain access to different features depending on whether they are on a Free license or an Individual plan. These permissions impact how they can manage TidyCal booking types, video conferencing integrations (Zoom, Google Meet, Microsoft Teams), and payment options (Stripe, PayPal).

Why it matters:

Choosing the right role helps you balance control and collaboration, prevent accidental changes, and streamline setup across your agency's booking types.

Unlocked features	Admin with Free Account	Admin on Individual Plan
Can create a Team	❌	❌
Can add members to Team	✅	✅
Can assign roles to members	❌	❌
Can create a Team booking type	✅	✅
Generate description with AI	❌	✅
Select Video Conferencing Options	❌	✅
Phone Call Options	✅	✅
Custom Location Options	❌	✅

Paid Bookings	❌	✅
Enable Team based booking types	✅	✅
Assign hosts	✅	✅
Set max bookings per period	❌	✅
Manually approve bookings	❌	✅
Ignore external calendar conflicts	✅	✅
Offer as Multi-session package	❌	✅
Allow multiple attendees per time slot	❌	✅
Allow attendees to bring guests	❌	✅
Generate questions with AI	❌	✅
Redirect to custom page after booking	❌	✅
Custom calendar invite	❌	✅
Custom email reminders	❌	✅
Set custom reply-to address	❌	❌
SMS reminders	❌	❌
CC your team on booking notifications	❌	✅
Booking page theme	✅	✅
Enable private mode	✅	✅
List in public TidyCal Directory	❌	✅

Important Notes

- Admin access applies only to the Teams they belong to.

- Paid bookings always use the Admin's Stripe or PayPal account — each Admin must connect their own integration.

- Agency owners cannot edit booking types created by Admins, and Admins cannot edit booking types created by the owner or other Admins.

- Video conferencing options (Zoom, Google Meet, Microsoft Teams) are tied to the booking type creator's integrations.

- Only the agency owner can assign or change member roles.

How to Assign an Admin Role

You can assign an Admin role when inviting a new member or by editing an existing Team.

1. From your Agency dashboard, go to [Teams](#).

2. Locate and edit the Team where the member belongs.

3. Scroll to the Members section.

4. Use the dropdown next to the member's email and select Admin.

5. Save your changes.

Next steps: Explore [team booking types](#), connect [integrations](#), and set up [Stripe or PayPal](#) for paid bookings.

Update | New Features

New features

1. Paid Bookings are now Open

    a. Paid bookings are now a feature for both free and paid tiers. To utilize this, a Stripe or PayPal integration is required. You can set this up at https://tidycal.com/integrations/payments.

2. Team Member Roles

    a. Admin roles can now be assigned to team members. This allows them to perform tasks previously restricted by the limited access of free or even pro accounts. With Admin roles, agency owners can effectively oversee multiple teams.=

3. Ignore External Calendar Conflicts

    a. A new feature in the Availability Restriction settings of each booking type has been added.

    b. Found in the Availability section of the booking type settings, users can now have the option to ignore calendar events even if they are marked as Busy.

    c. When **enabled,** this will allow TidyCal to book clients even if the user is blocked in their external calendar calendars.

    d. This setting does not affect TidyCal's normal behavior of preventing overlapping schedule