LiveID +

Calendly Integration Example

Introduction

The present document describes a possible solution to the task of setting up a tool to schedule LiveID+ sessions between clients and operators.
In this document Calendly has been chosen because of its ease of setup and use, nevertheless the same schema can be applied to many different scheduling services available in the market.

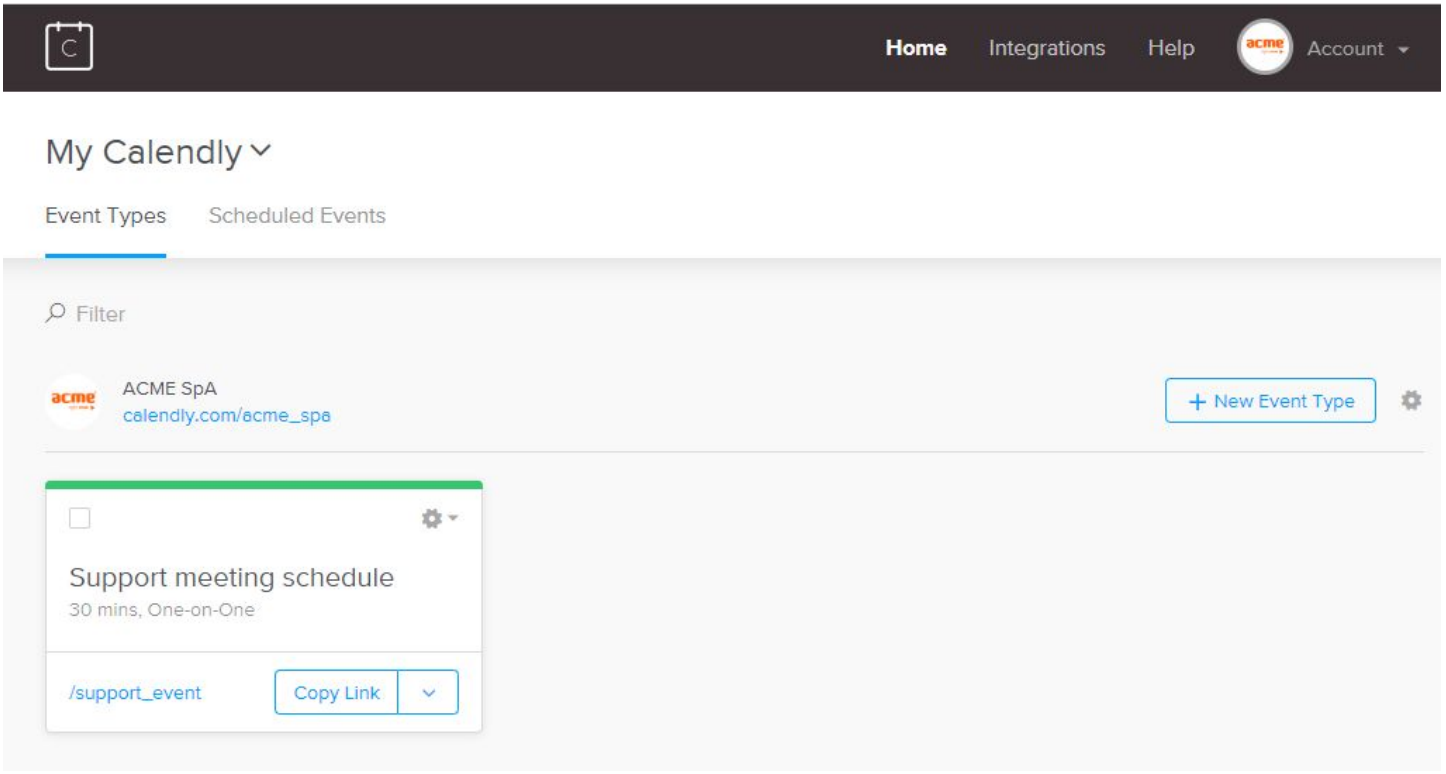
In this example we're going to set up everything an hypothetical **ACME SpA** corporation needs to schedule LiveID+ conferences with their customers.

Setting up Calendly account

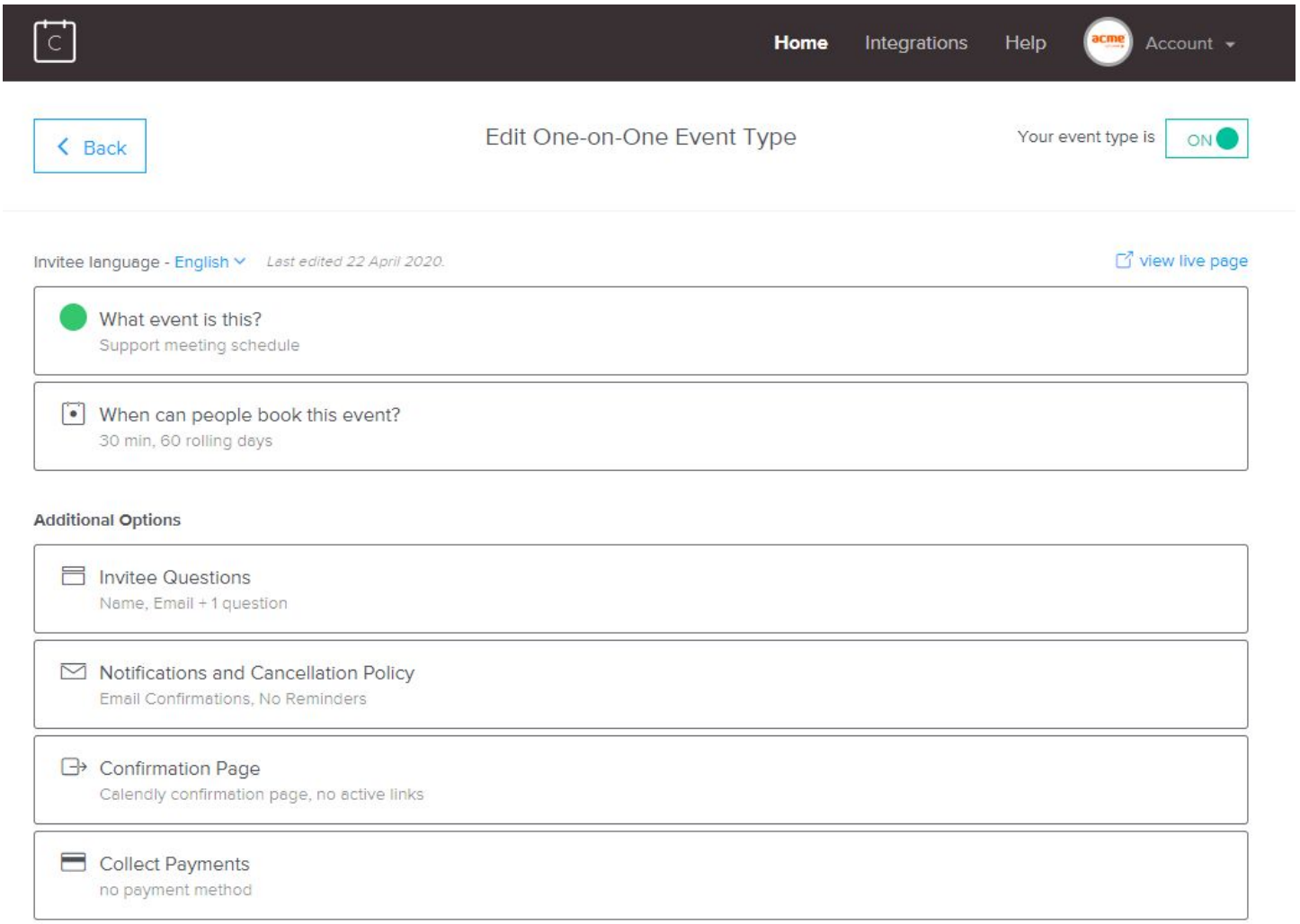
First ACME needs to register and setup a Calendly account.
Even a free one can be used for the purpose of this document.

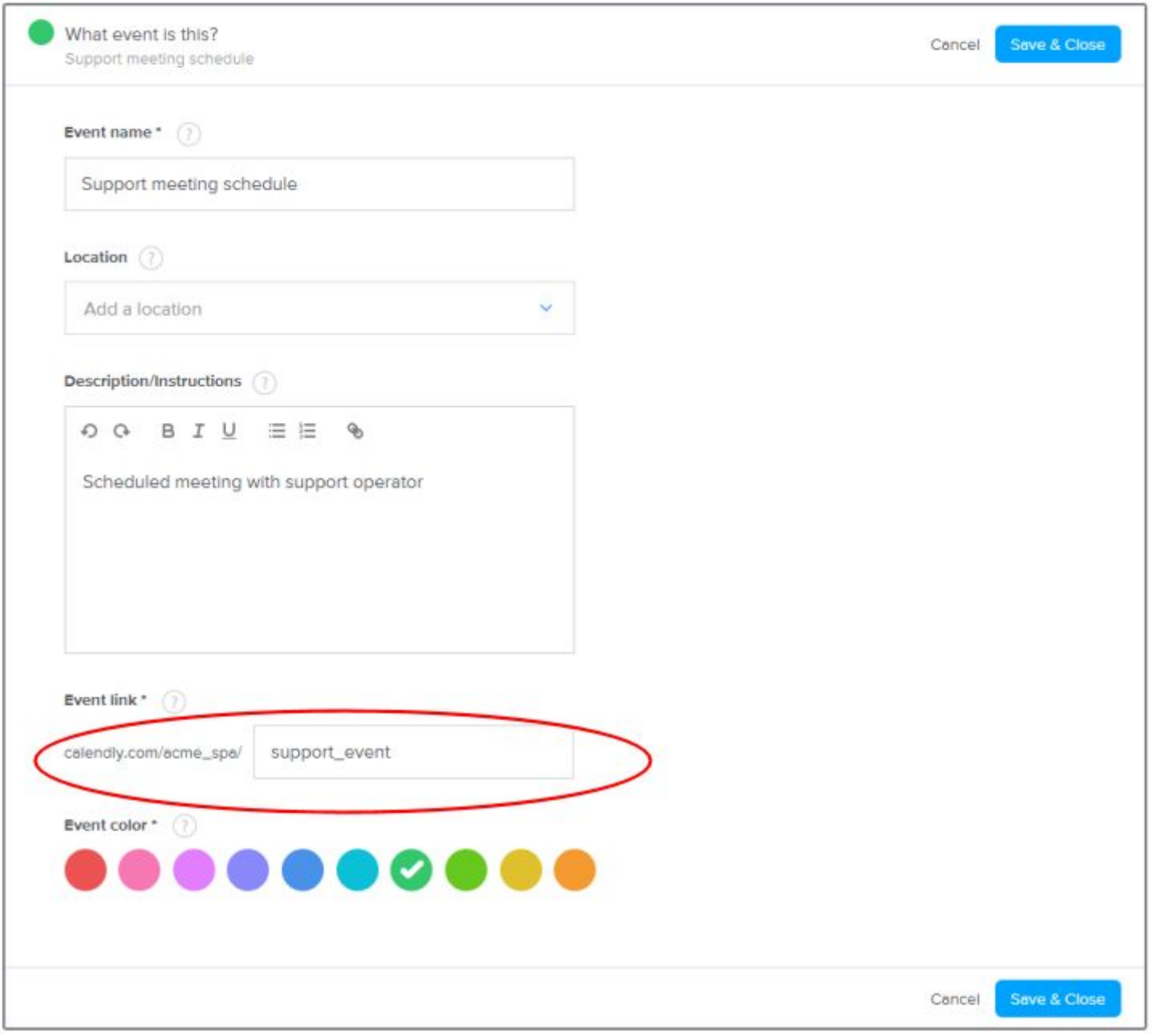
In the initial registration, ACME chooses its base url: **https://calendly.com/acme_spa**

After initial registration on Calendly, we're going to define an event type, call it "Support meeting schedule".



Looking at its details:


Home
Integrations
Help
Account
Back
Edit One-on-One Event Type
Your event type is
ON
Invitee language - English
Last edited 22 April 2020.
view live page
What event is this?
Support meeting schedule
When can people book this event?
30 min, 60 rolling days
Additional Options
Invitee Questions
Name, Email + 1 question
Notifications and Cancellation Policy
Email Confirmations, No Reminders
Confirmation Page
Calendly confirmation page, no active links
Collect Payments
no payment method

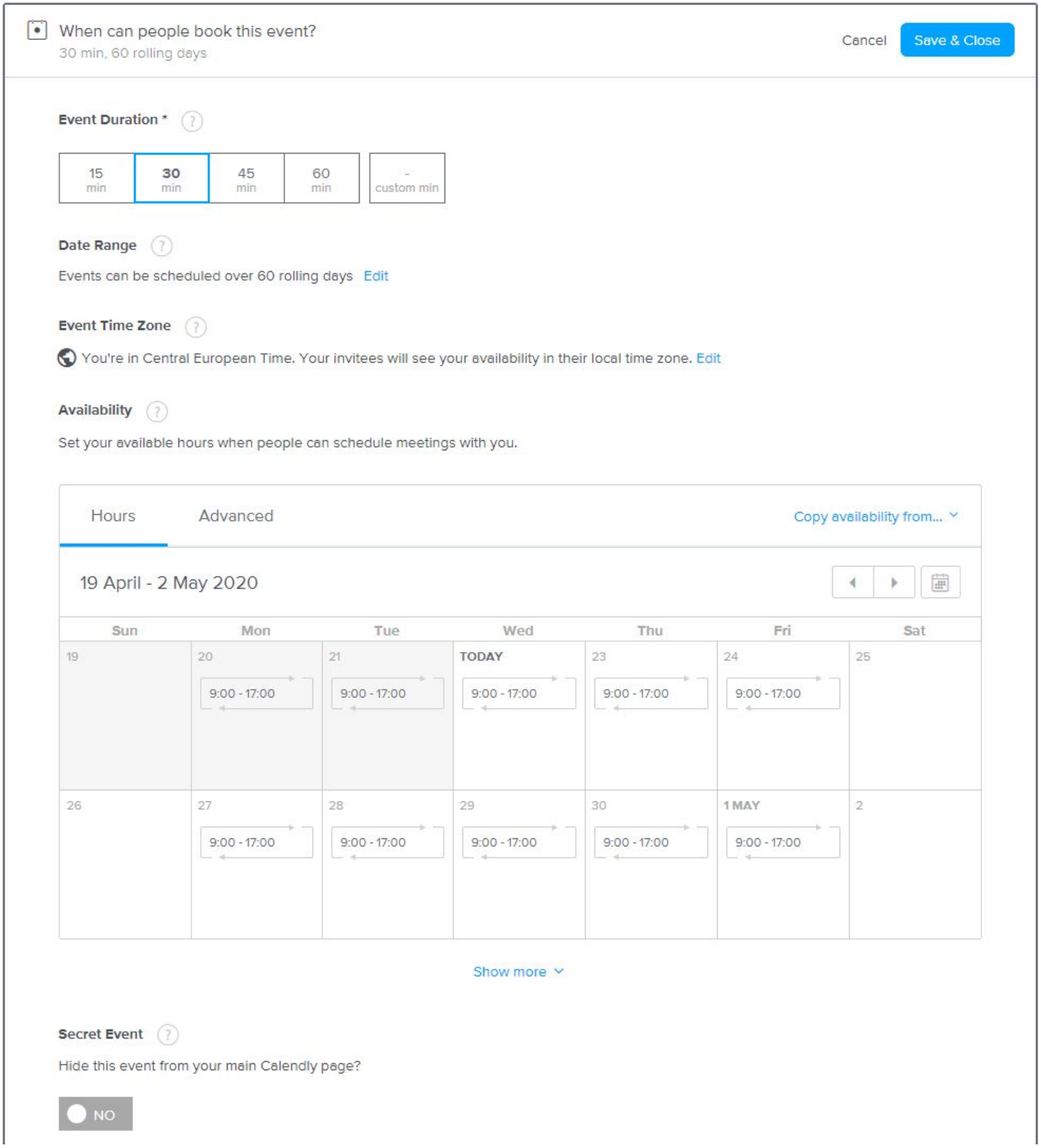


In the page above, ACME defines the event-specific part of the url: **support_event**

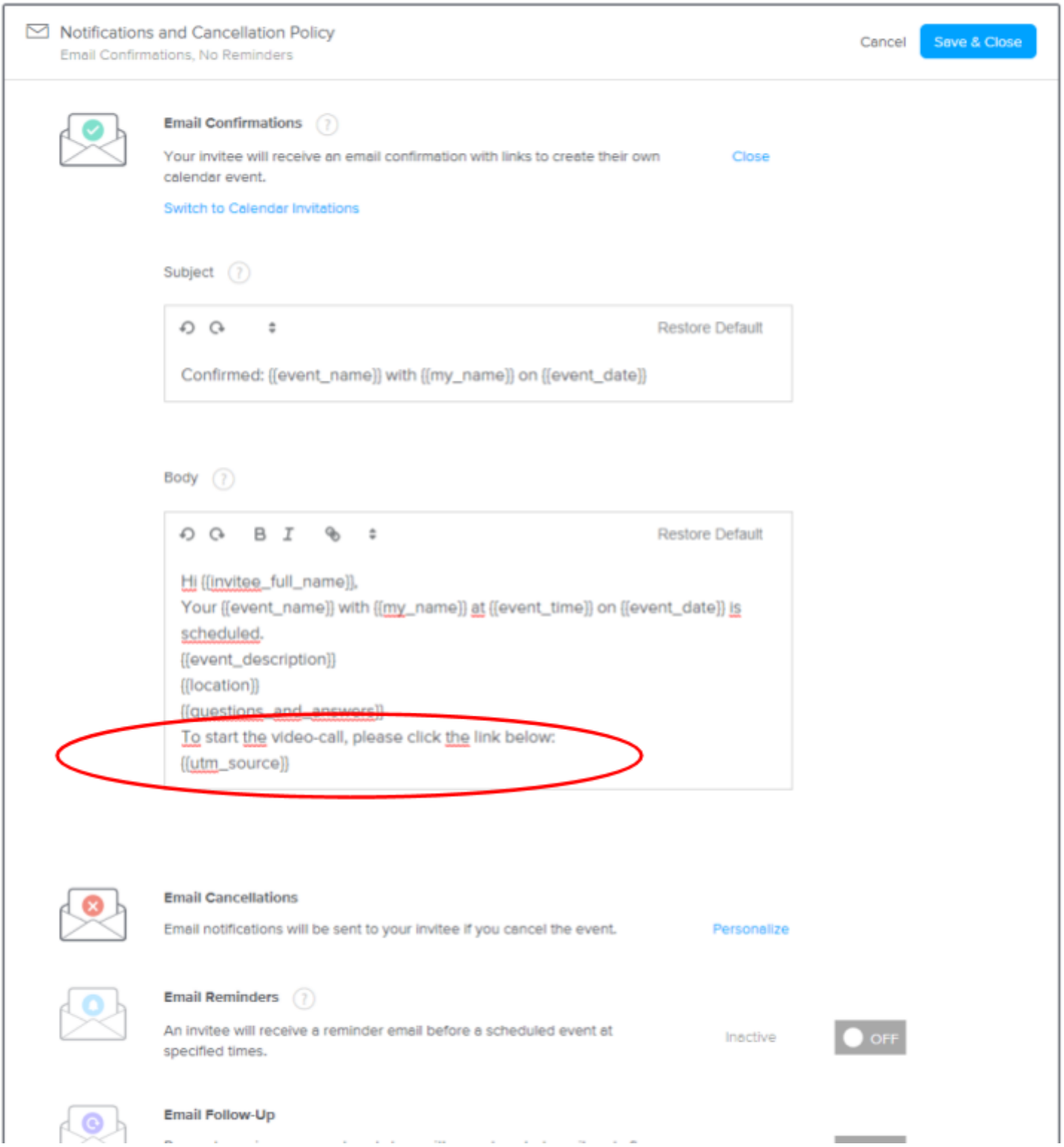
These 2 steps alone allow the customer to start a basic event-booking workflow for this type of event by pointing their browser to the URL:

https://calendly.com/acme_spa/support_event

Let's call this the **Calendly event booking URL**, we'll need this definition later.
But that's not enough for LiveID+ integration.
Let's go on and customize this event type more deeply.



In the above page, ACME defines operators availability for this type of event.

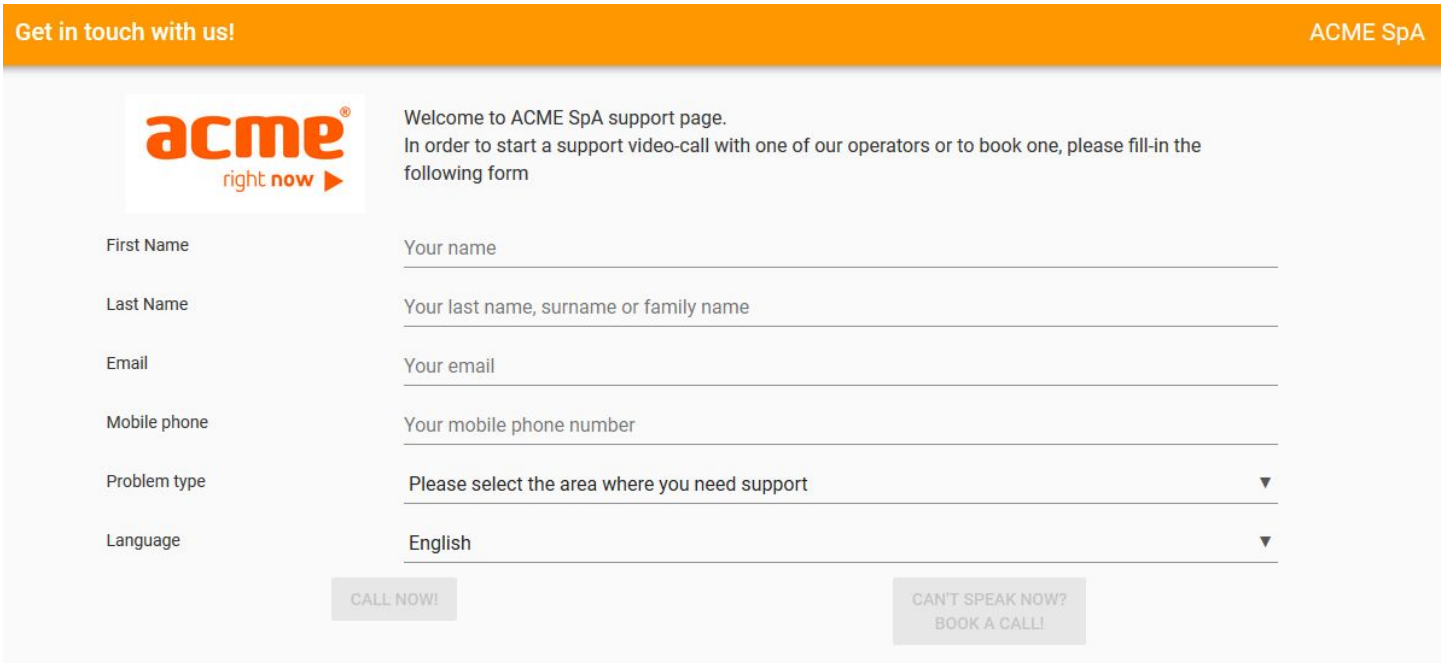


Last, but very important in our simplified integration example, is the page above.
Here ACME customizes the notification email's template.
In particular, ACME adds to the message the final statement, where the customer will be presented with a link to start the video-conference.
This link is supposed to be passed to Calendly in its **utm_source** parameter.

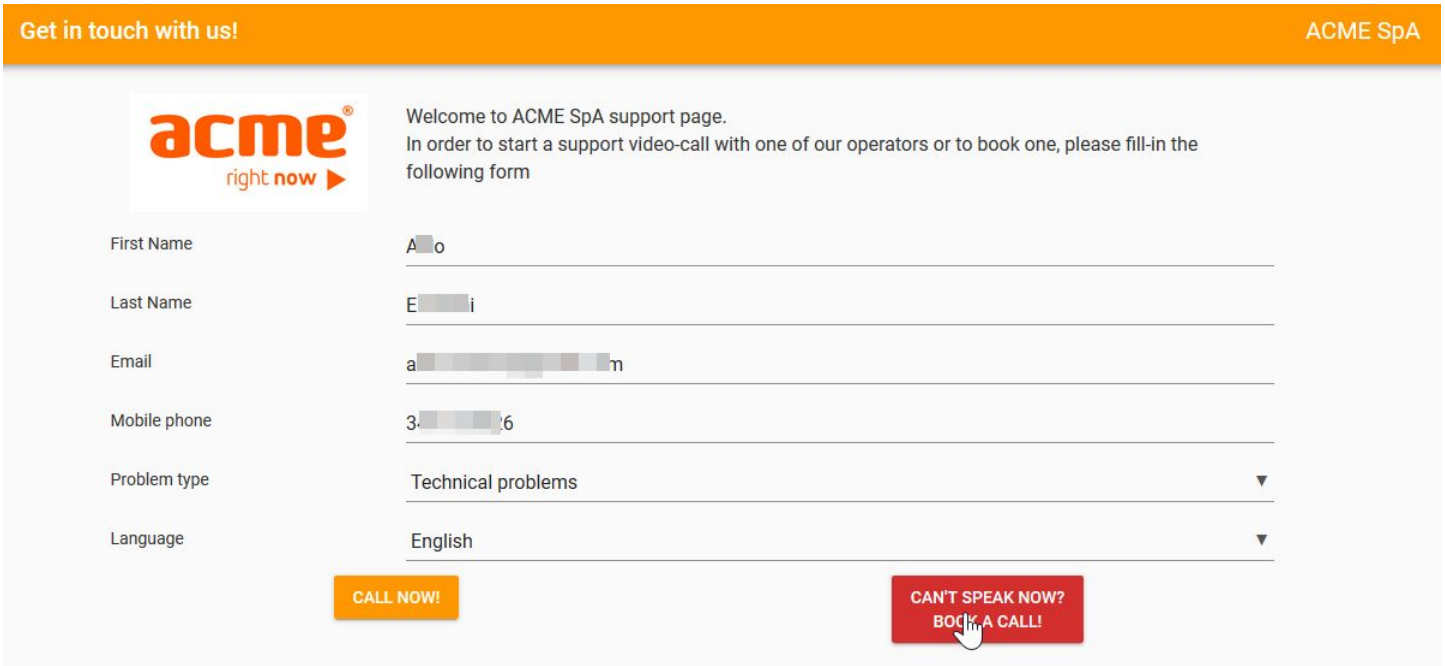
The setup on Calendly's side is over.

Setting up ACME's onboarding page

ACME, on his side, needs to build what LiveID+ calls an "*onboarding page*".
That is, a page where the customer will fill in the information required to start a LiveID+ video call with ACME's operator.
This can be as simple as the following:



ACME's customer, after having filled out the form, clicks on "BOOK A CALL" button:



On button's click, ACME's page accomplishes some simple tasks:

1. calls LiveID+'s pushAsyncCall API with the data filled in by the customer and other configuration parameters unique to ACME's use case:
    a. ACME's LiveID+'s organization ID
    b. LiveID+'s process ID to be started on LiveID+'s side

2. the call returns to ACME's page a unique identifier (UID) that represents the call that is to be done later;

3. ACME's page uses this UID to build an URL that can be used later to open the call in the browser. The URL will be in the form of:

   https://liveid.test.namirialtsp.com/app/service-asyncall/?uId=0bUmW5rWQKEZ15SYnBVL

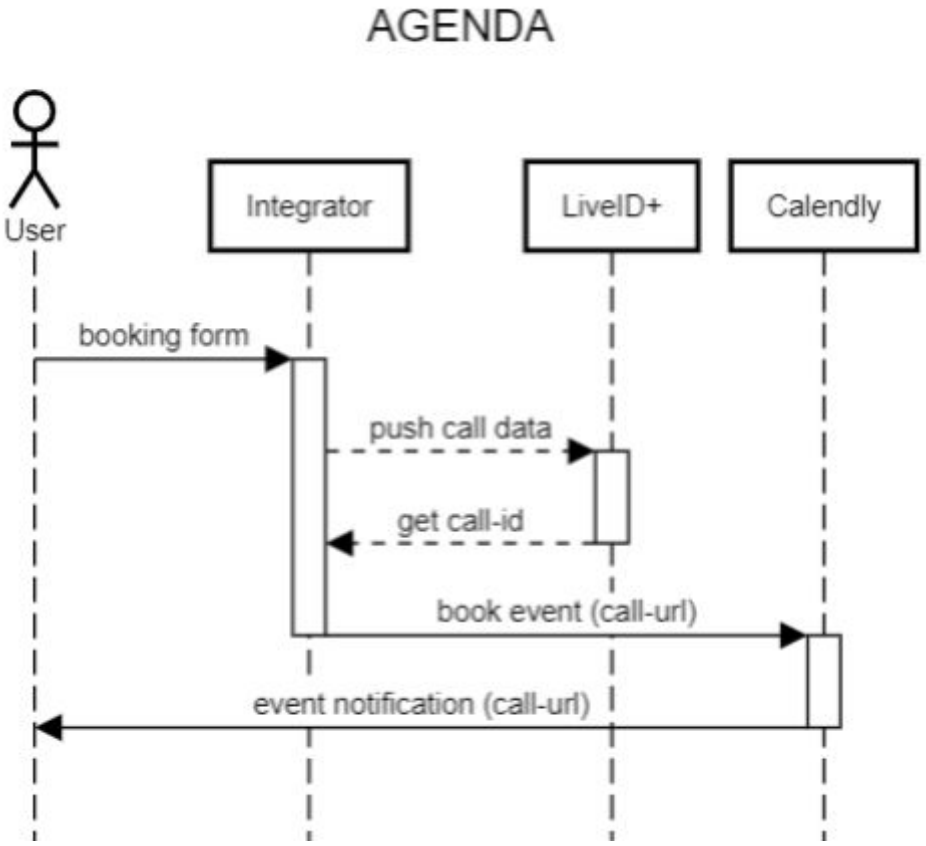
   Let's call this the **LiveID+'s call URL**

4. ACME's page combines **Calendly event booking URL** with **LiveID+'s call URL**, to be precise LiveID+'s call URL is passed as **utm_source** parameter. So, in the end, the browser is pointed to URL:

https://calendly.com/acme_spa/support_event?utm_source=https://liveid.test.namirialtsp.com/app/service-asyncall/?uId=0bUmW5rWQKEZ15SYnBVL

Where you can recognize the three elements combined.

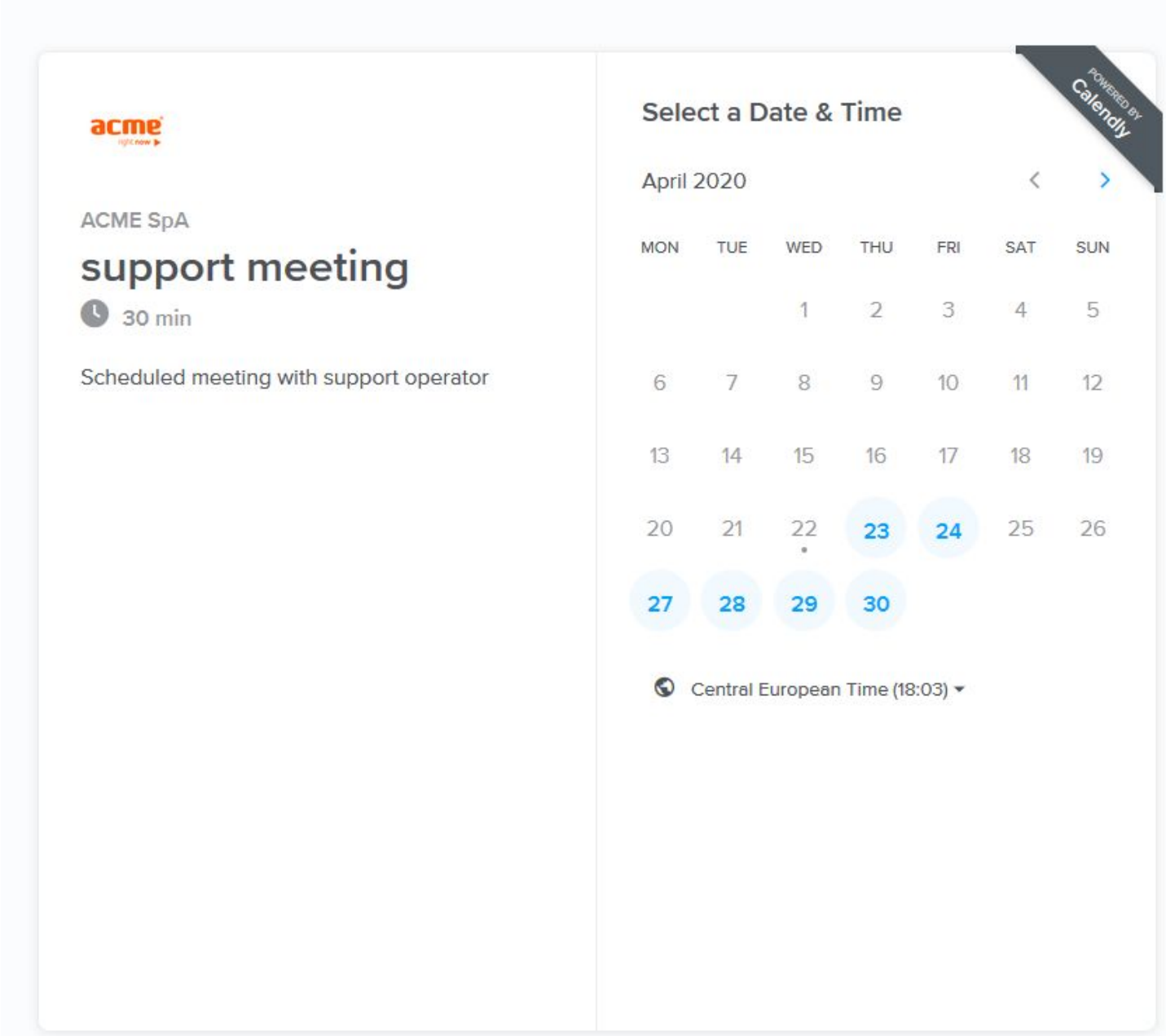
The use case can be represented by this simplified schema:

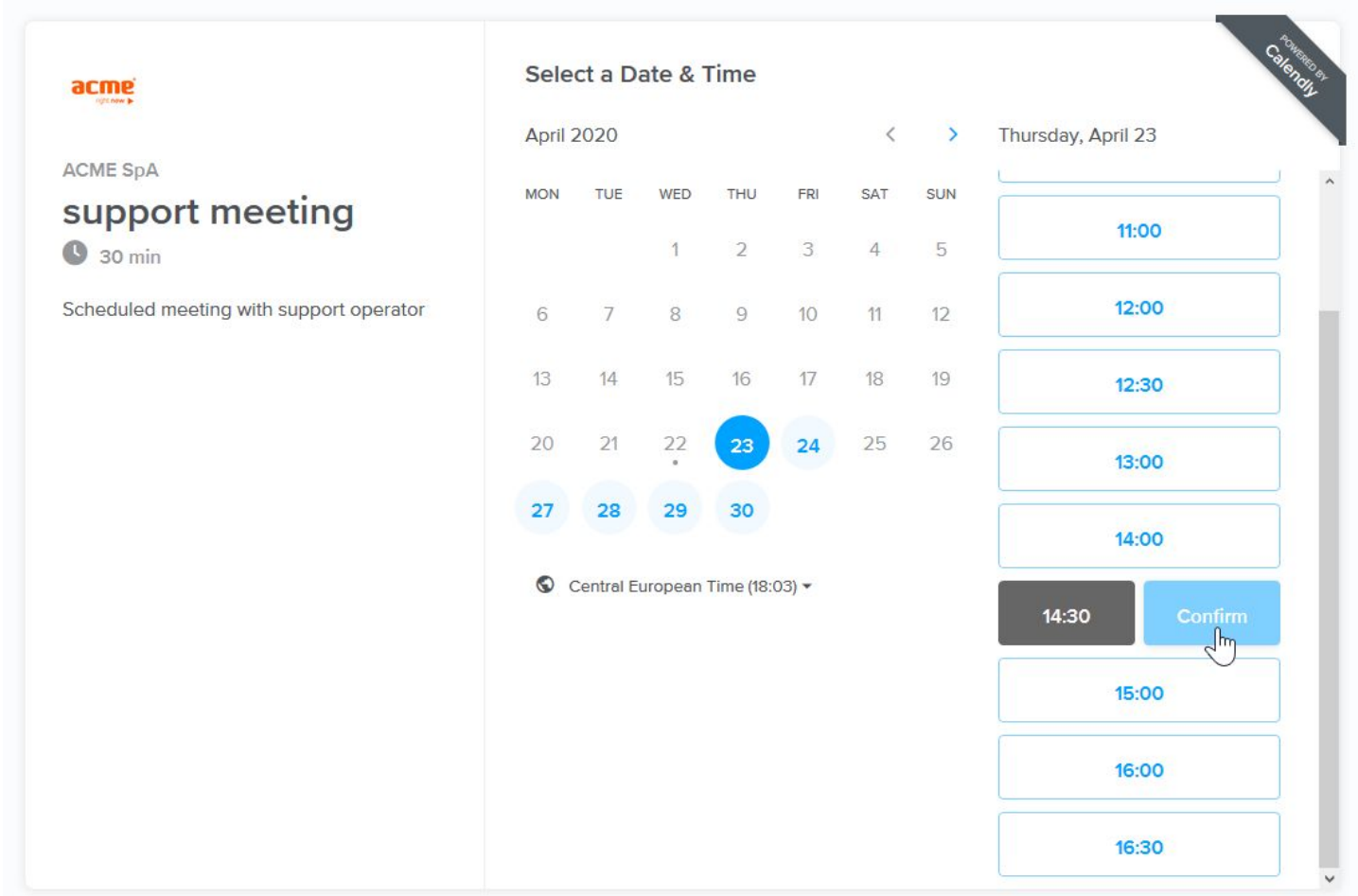


This onboarding page demo can be tried *live* at https://liveidplus-demo-apps.anvil.app

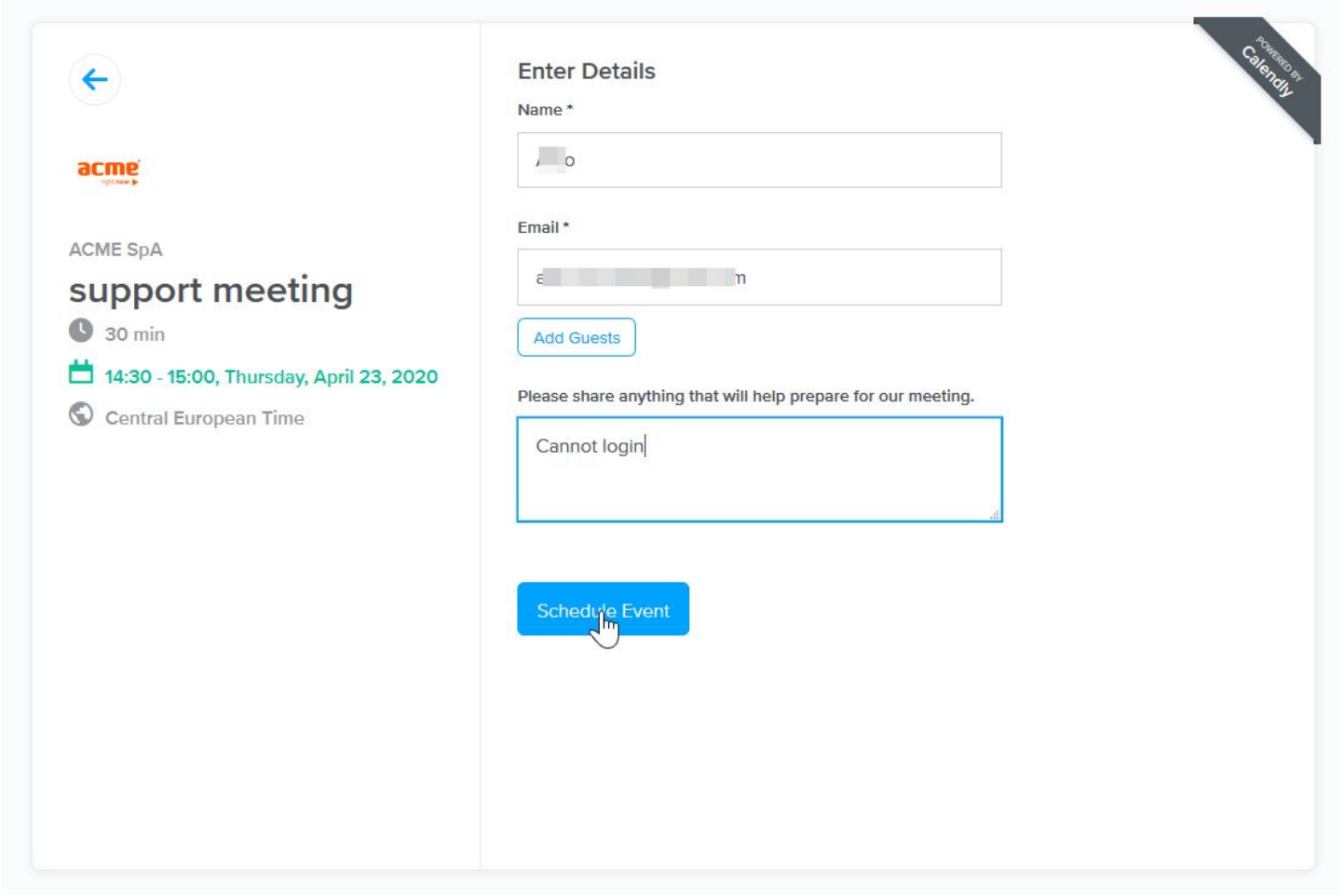
Customer event booking on Calendly

The customer is then redirected to Calendly and has a smooth booking process experience:

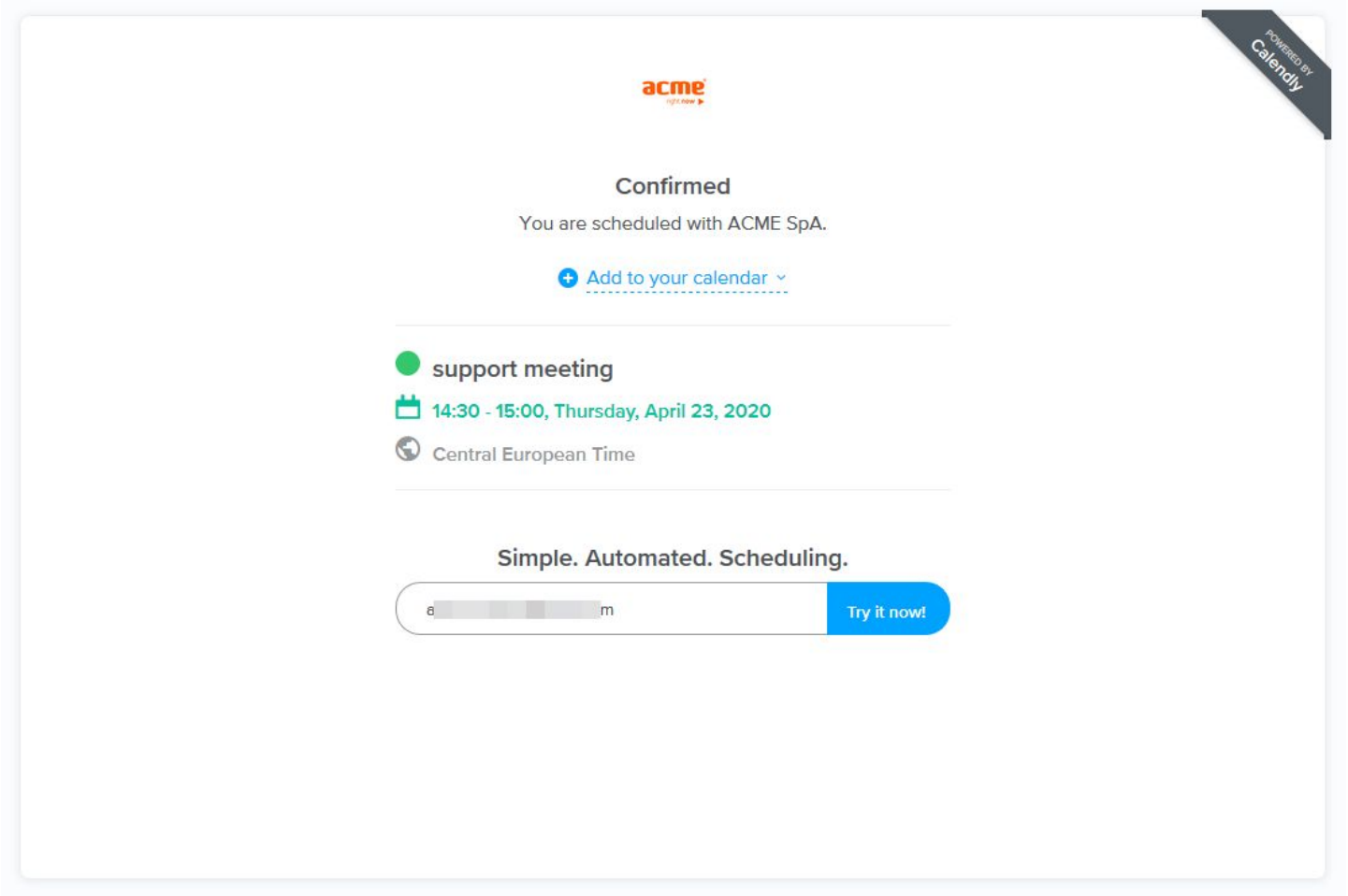




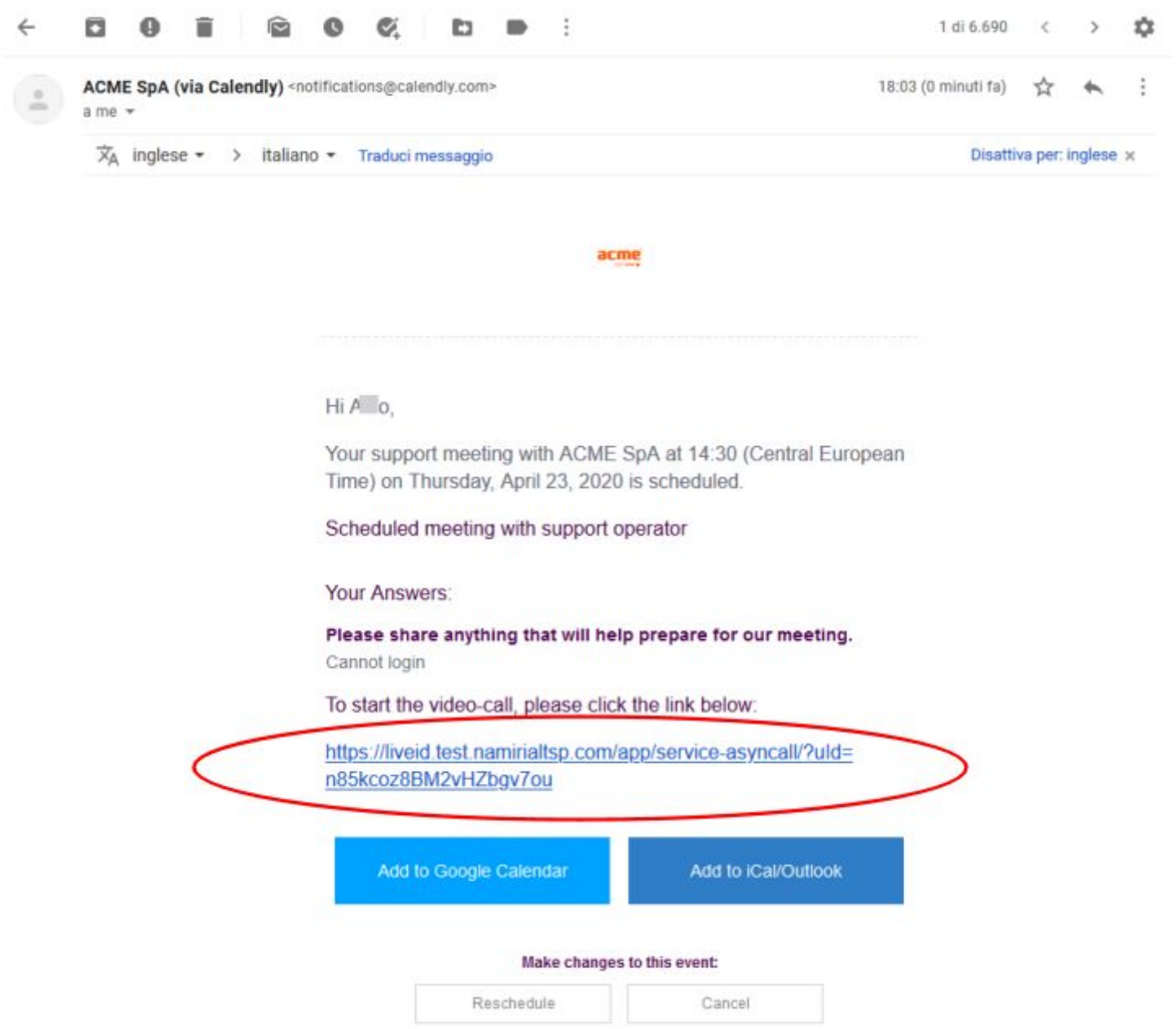
The customer chooses a day, a time and confirms.



He can add some details and schedule the call with ACME's operator.



After the confirmation screen, he receives a confirmation email.



As you can see, in the confirmation email, Calendly inserts **LiveID+'s call URL** we specified as **utm_source** parameter both in the URL and in confirmation email's template.

Final considerations

As you have seen, integration with Calendly is very simple to setup and requires *zero additional configuration* on LiveID+'s side.
That's why we said at the beginning that *the same integration schema can be easily applied to other scheduling service providers as well*.
The integration is carried out by *ACME's onboarding page* and that could be adapted to any other service provider.

This example has been intentionally left as simple as possible.
Calendly itself offers many more customization options you can explore by yourself.
Don't forget to try this integration scenario in our demo https://liveidplus-demo-apps.anvil.app