Booking Settings for Practitioners on a Team

IntakeQ allows you to have multiple practitioners (//support.intakeq.com/article/16-multiple-practitioners) within a team account, giving you the ability to have separate calendars, client lists, form templates, services, etc. for each practitioner. Practitioners can also control their individual booking settings as well, allowing them to override various account defaults.

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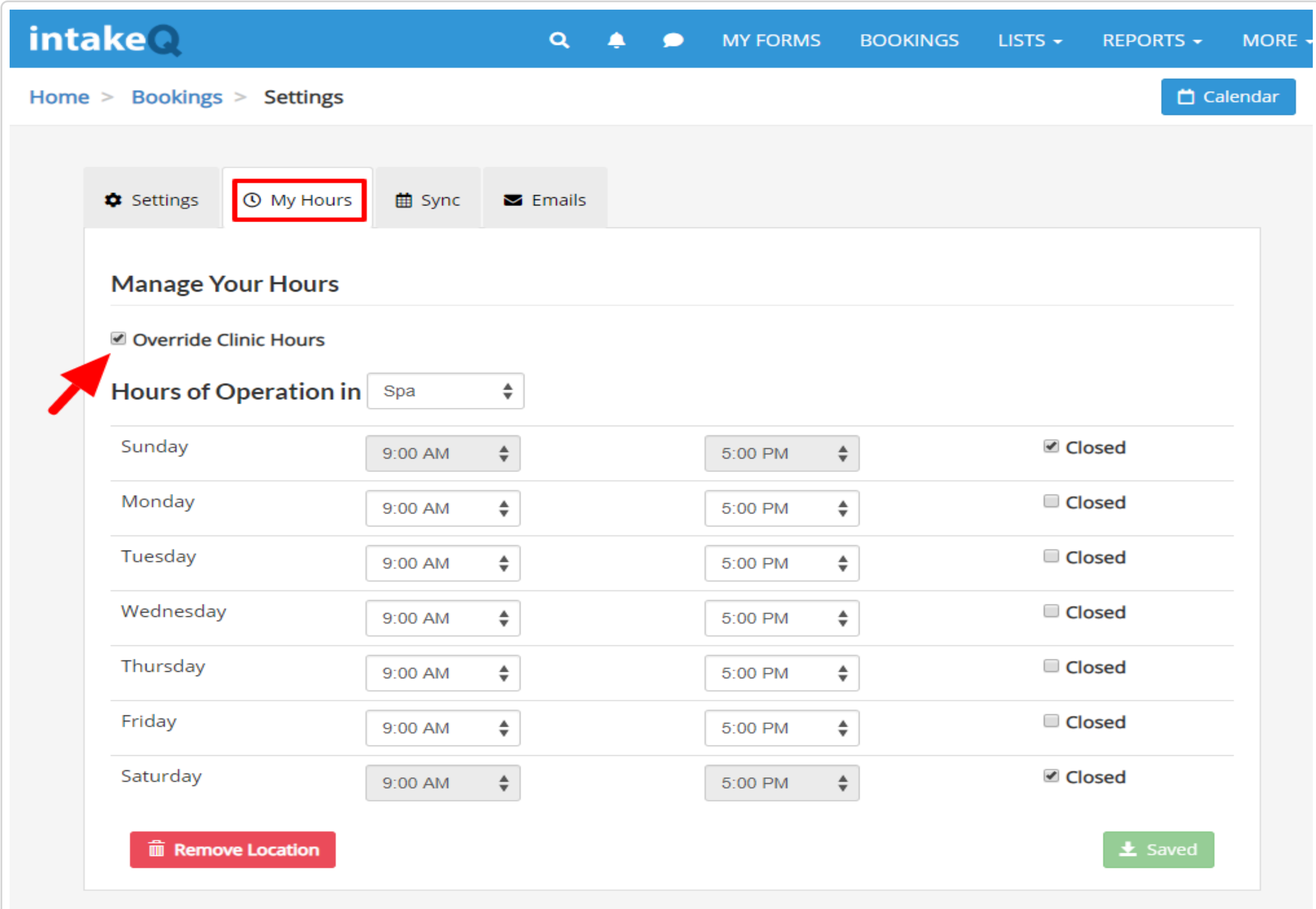
How to Set Individual Practitioner Hours

As a non-admin practitioner, you have the ability to set your own hours for each location setup in the team. This will make the booking system use your hours as opposed to the default hours at each location. To adjust your hours, follow the steps below:

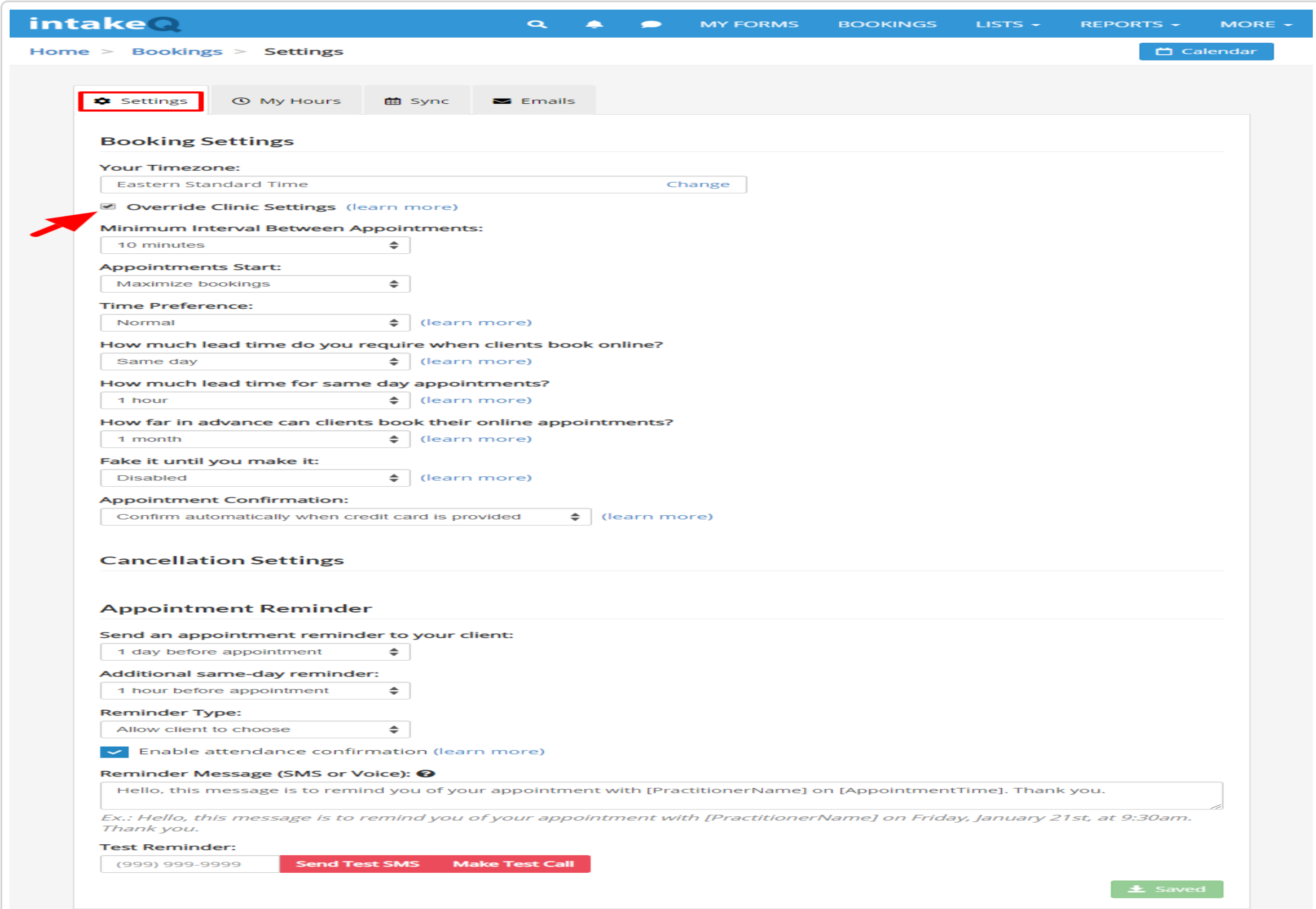
1. Navigate to **"Bookings > Booking Settings"** and select the **"My Hours"** tab.
2. Check the option labelled **"Override Clinic Hours"**, and select the location you want to adjust the hours for (if there are multiple).
3. You'll be able to set your own specific hours that will override the default clinic hours.



How to Adjust Individual Practitioner Settings

Each practitioner on a team can adjust their booking settings as well, such as the time interval between appointments, appointment lead time, appointment confirmation method, etc. To adjust these settings, follow the steps below:

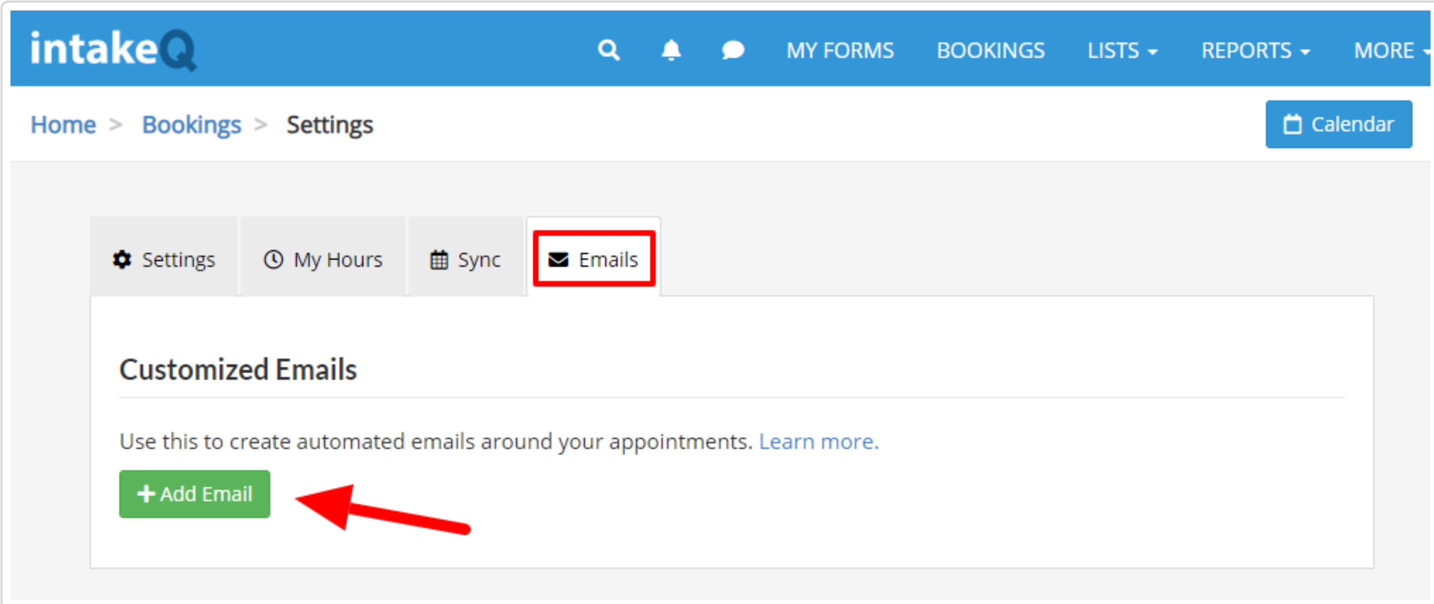
1. Navigate to **"Bookings > Booking Settings"** and select the **"Settings"** tab.
2. Check the option labelled **"Override Clinic Settings"**, just above that you can adjust your personal timezone as well.
3. You'll be presented with a list of booking settings you can adjust, which will override the default settings of the clinic.



How to Customize Individual Practitioner Emails

Each practitioner on a team can adjust the various email templates that are used for appointment confirmations, reminders, etc. To adjust these and override the default email templates, follow the steps below:

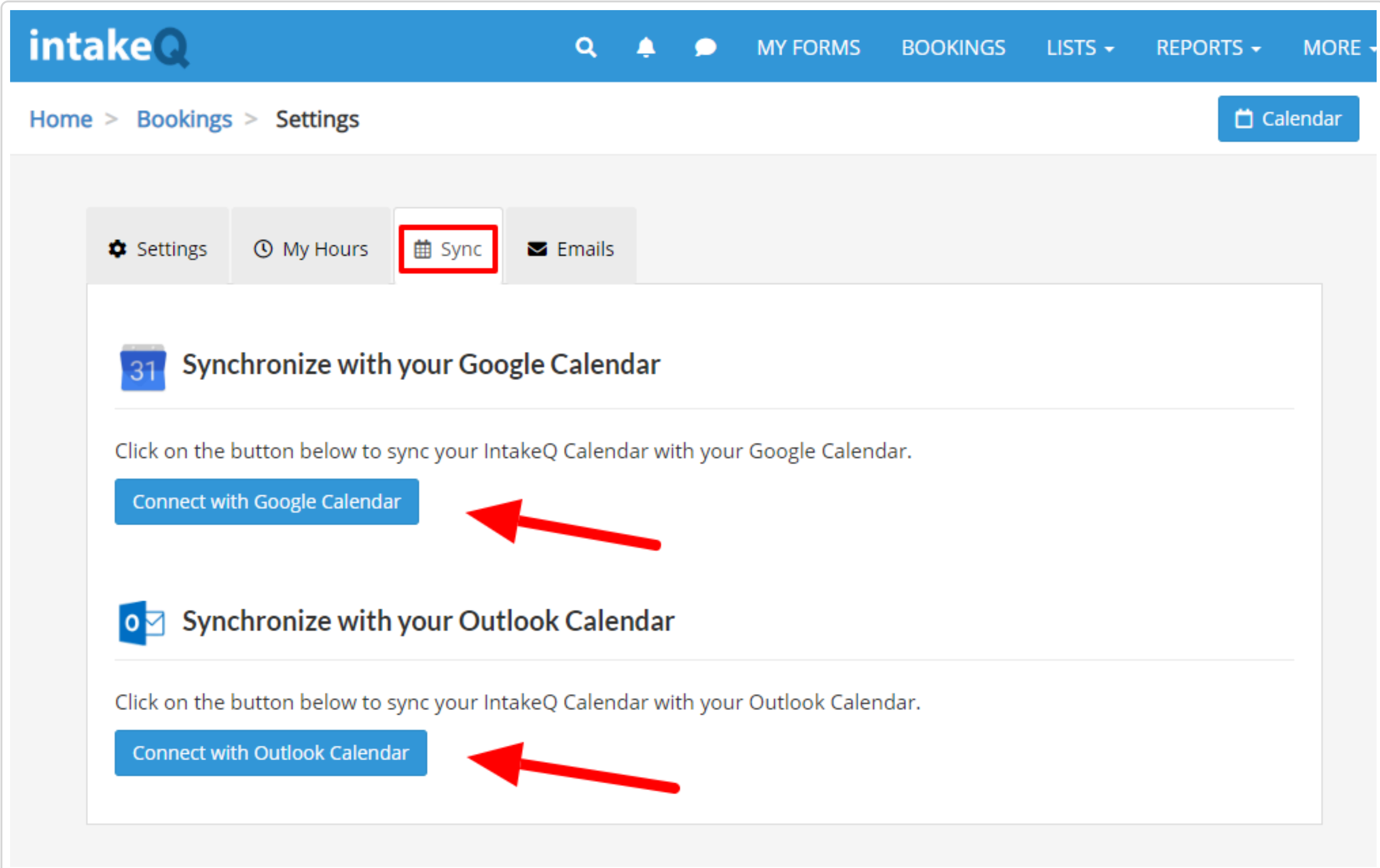
1. Navigate to **"Bookings > Booking Settings"** and select the **"Emails"** tab.
2. Click **"Add Email"**, and you'll be presented with a list of email templates you're able to customize.
3. For additional information on what these emails do and how to set them up, please see the following article: Automated Emails (//support.intakeq.com/article/80-automated-emails)



How to Sync a Different Google/Outlook Calendar

Each practitioner on a team can sync their own Google or Outlook calendar, which can be set to show up on the team calendar or the individual practitioner's calendar view. The steps below show where to go to sync your own calendar, separate from the calendar setup on the main booking settings:

1. Navigate to **"Bookings > Booking Settings"** and select the **"Sync"** tab.
2. To sync a Google Calendar click **"Connect with Google Calendar"**.
3. To sync an Outlook Calendar click **"Connect with Outlook Calendar"**.
4. For each you'll be prompted to sign-in to your Google/Outlook account and follow the steps to complete the sync.

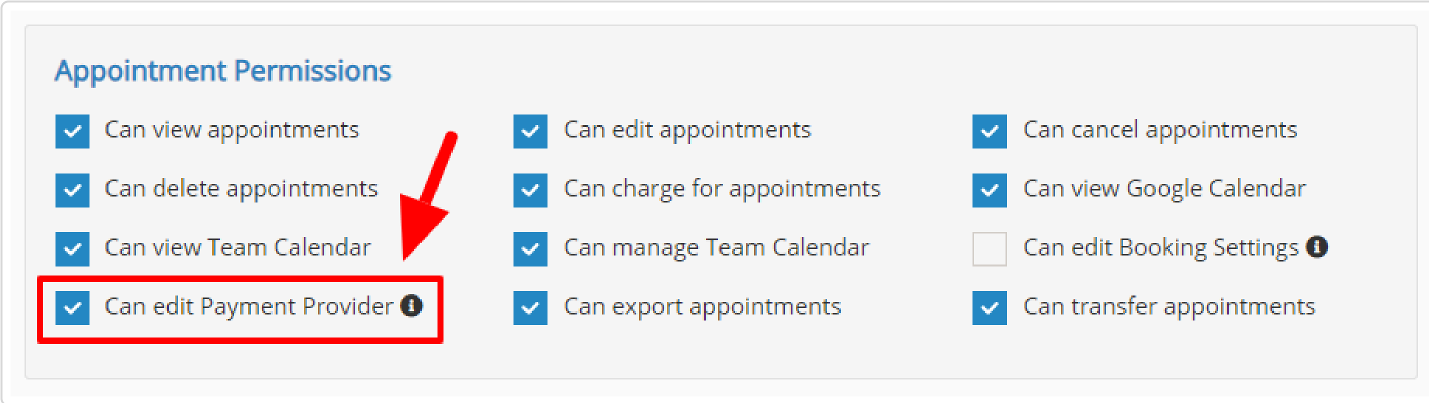


How to Use a Different Payment Provider

If permitted by the account administrator, each practitioner has the ability to use their own Stripe/Square account. This will allow each practitioner to process payments for their clients that go straight into their bank account, as opposed to the entire team sharing one provider. This option is not enabled by default, follow the steps below to enable it for specific user roles on your team:

Adjusting the User Role Settings

1. As the account admin, navigate to **"Team > Roles"** and select **"Edit"** next to the role of the user group you're looking to give additional payment provider options to. You can also create custom user roles if you'd like, for additional information on setting permissions, see the following article: Setting User Permissions (//support.intakeq.com/article/179-setting-user-permissions)
2. In the user role permissions dialog, look for the section titled **"Appointment Permissions"**, under this you'll want to check off the box beside **"Can edit Payment Provider"**.

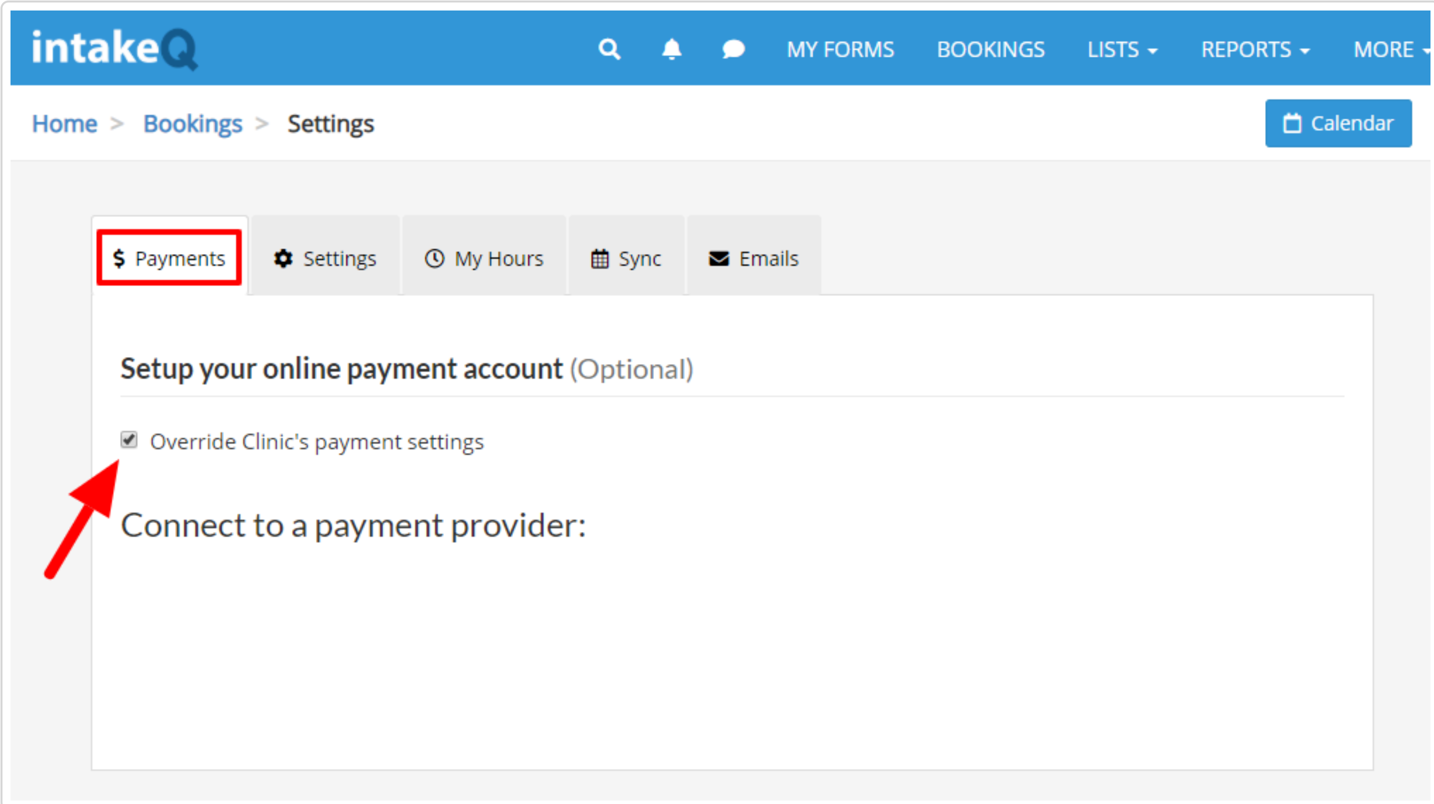


Using a Different Payment Provider

Please read the following article before using multiple payment providers within one IntakeQ account: Using Multiple Payment Providers (//support.intakeq.com/article/321-booking-settings-for-practitioners-on-a-team)

After adjustment the user role permissions as noted above, you will gain access to a new tab in the booking settings for additional practitioners. Follow the steps below to setup a different payment provider to be used as opposed to the one setup on the main admin account:

1. Navigate to **"Bookings > Booking Settings"** and select the **"Payments"** tab.
2. Checked the box next to the option labelled **"Override Clinic's payment settings"**.
3. You will be shown the Stripe and Square icons, click on one of them to proceed with the connection process.



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