

Booking Settings for Practitioners on a Team

IntakeQ allows you to have multiple practitioners ([//support.intakeq.com/article/16-multiple-practitioners](https://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.

Jump to a Section

- [How to Set Individual Practitioner Hours \(#hours\)](#)
- [How to Adjust Individual Practitioner Settings \(#settings\)](#)
- [How to Customize Individual Practitioner Emails \(#emails\)](#)
- [How to Sync a Different Google/Outlook Calendar \(#calendar\)](#)
- [How to Use a Different Payment Provider \(#payment\)](#)

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.

intakeQ 🔍 🔔 💬 MY FORMS BOOKINGS LISTS ▾ REPORTS ▾ MORE ▾

Home > Bookings > Settings Calendar

⚙️ Settings **🕒 My Hours** 📅 Sync ✉️ Emails

Manage Your Hours

☒ **Override Clinic Hours**

Hours of Operation in Spa ▾

Sunday	9:00 AM ▾	5:00 PM ▾	<input checked="" type="checkbox"/> Closed
Monday	9:00 AM ▾	5:00 PM ▾	<input type="checkbox"/> Closed
Tuesday	9:00 AM ▾	5:00 PM ▾	<input type="checkbox"/> Closed
Wednesday	9:00 AM ▾	5:00 PM ▾	<input type="checkbox"/> Closed
Thursday	9:00 AM ▾	5:00 PM ▾	<input type="checkbox"/> Closed
Friday	9:00 AM ▾	5:00 PM ▾	<input type="checkbox"/> Closed
Saturday	9:00 AM ▾	5:00 PM ▾	<input checked="" type="checkbox"/> Closed

🗑️ Remove Location 💾 Saved

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:

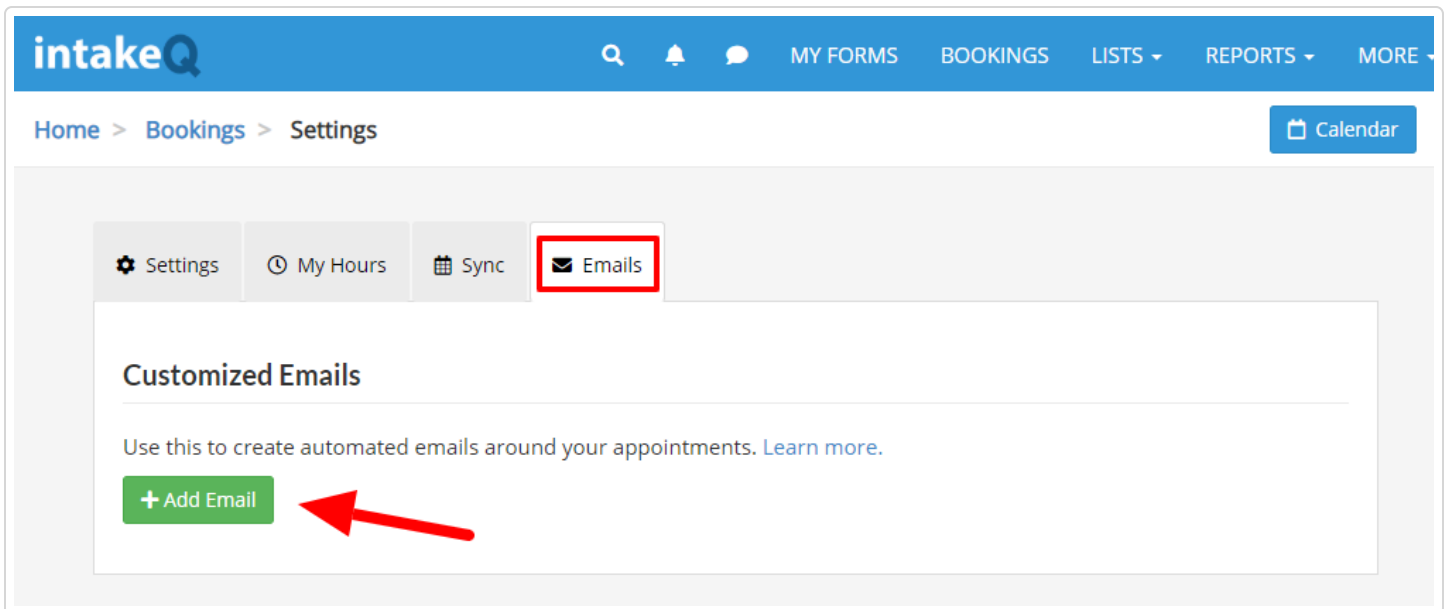
1. Navigate to "**Bookings > Booking Settings**" and select the "**Settings**" tab.
2. Check the option labelled "**Override Clinic Settings**", just above that you can adjust your personal timezone as well.
3. You'll be presented with a list of booking settings you can adjust, which will override the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

The screenshot shows the IntakeQ web application interface. At the top, there's a navigation bar with 'intakeQ' logo and links for MY FORMS, BOOKINGS, LISTS, REPORTS, and MORE. Below this is a breadcrumb trail: Home > Bookings > Settings. The 'Settings' tab is highlighted with a red box and a red arrow. The main content area is titled 'Booking Settings' and contains several sections: 'Your Timezone' (Eastern Standard Time), 'Override Clinic Settings' (checked), 'Minimum Interval Between Appointments' (10 minutes), 'Appointments Start' (Maximize bookings), 'Time Preference' (Normal), 'How much lead time do you require when clients book online?' (Same day), 'How much lead time for same day appointments?' (1 hour), 'How far in advance can clients book their online appointments?' (1 month), 'Fake it until you make it' (Disabled), and 'Appointment Confirmation' (Confirm automatically when credit card is provided). Below these are 'Cancellation Settings' and 'Appointment Reminder' settings, including 'Send an appointment reminder to your client' (1 day before), 'Additional same-day reminder' (1 hour before), 'Reminder Type' (Allow client to choose), and 'Enable attendance confirmation' (checked). A 'Reminder Message (SMS or Voice)' section shows a template message: 'Hello, this message is to remind you of your appointment with [PractitionerName] on [AppointmentTime]. Thank you.' An example message is provided below. At the bottom, there's a 'Test Reminder' section with a phone number (999) 999-9999 and buttons for 'Send Test SMS' and 'Make Test Call'. A green 'Saved' button is in the bottom right corner.

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:

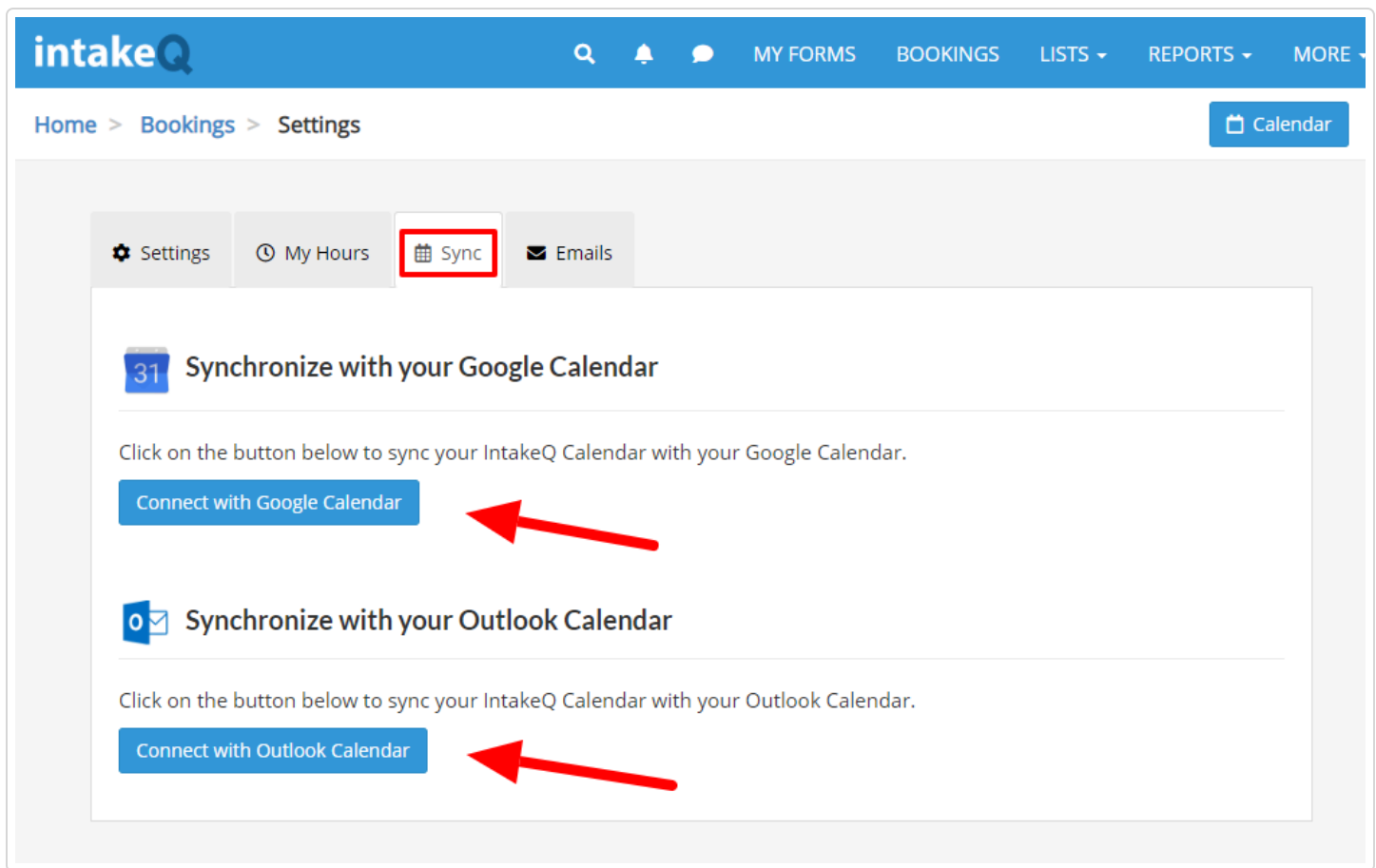
1. Navigate to "**Bookings > Booking Settings**" and select the "**Emails**" tab.
2. Click "**Add Email**", and you'll be presented with a list of email templates you're able to customize.
3. For additional information on what these emails do and how to set them up, please see the following article: [Automated Emails \(//support.intakeq.com/article/80-automated-emails\)](https://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 \(//support.intakeq.com/article/179-setting-user-permissions\)](https://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**".

Appointment Permissions

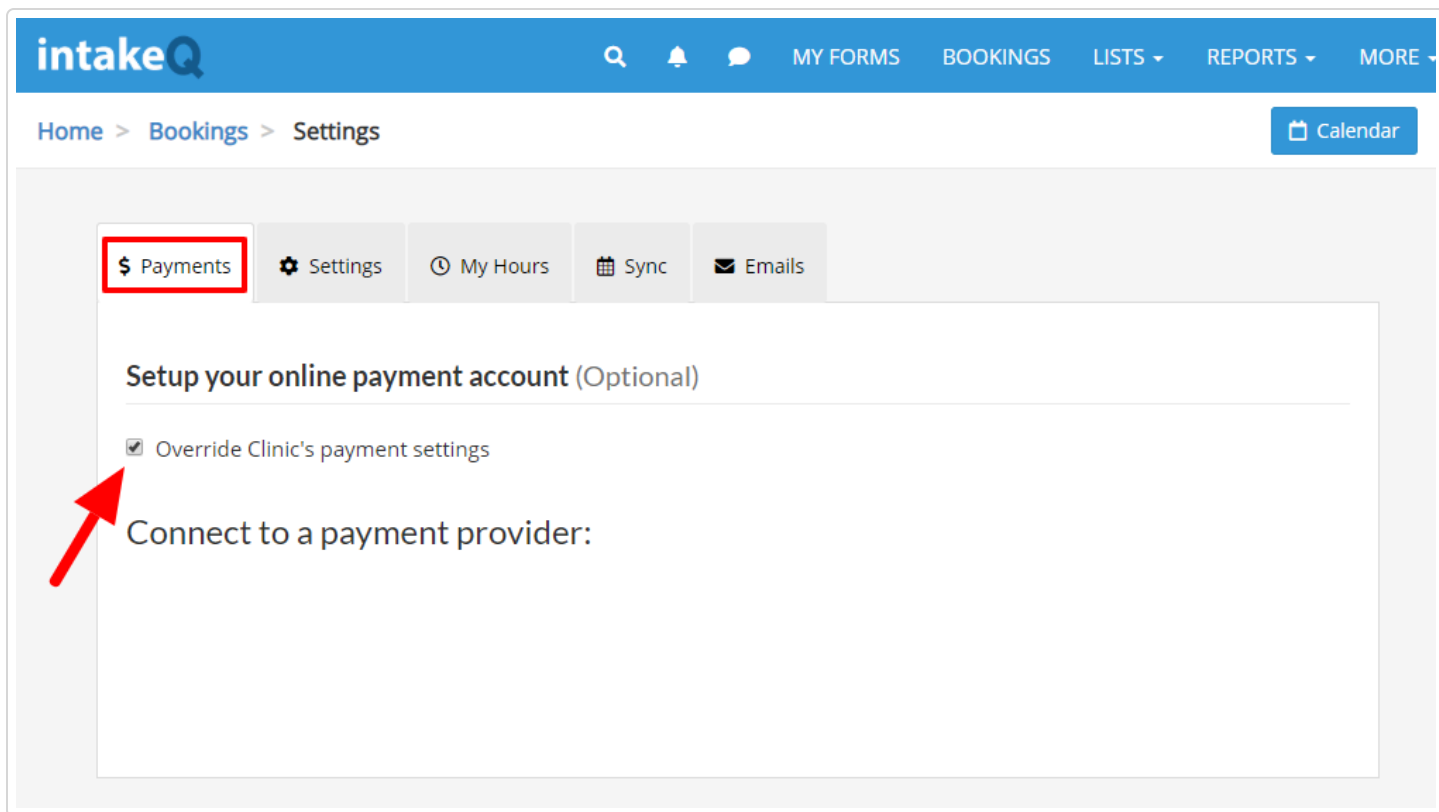
<input checked="" type="checkbox"/> Can view appointments	<input checked="" type="checkbox"/> Can edit appointments	<input checked="" type="checkbox"/> Can cancel appointments
<input checked="" type="checkbox"/> Can delete appointments	<input checked="" type="checkbox"/> Can charge for appointments	<input checked="" type="checkbox"/> Can view Google Calendar
<input checked="" type="checkbox"/> Can view Team Calendar	<input checked="" type="checkbox"/> Can manage Team Calendar	<input type="checkbox"/> Can edit Booking Settings ⓘ
<input checked="" type="checkbox"/> Can edit Payment Provider ⓘ	<input checked="" type="checkbox"/> Can export appointments	<input checked="" type="checkbox"/> Can transfer appointments

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](https://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.



✉ *Still need help? Contact Us (#)*

Last updated on April 19, 2024

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