



[Knowledge Base](#) > [Gym Lead Machine](#) > [Calendars](#) > [Book Appointments in GLM](#)

Book Appointments in GLM

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Gym Lead Machine offers several ways to **book appointments** for your contacts: via the Calendars, Opportunities, or Contacts sections. Depending on your needs, you can choose between standard appointment slots that respect user availability or custom slots that allow you to book outside set times.

Standard vs. Custom Appointments: Which Should You Use?

	Standard Appointment	Custom Appointment
Respects office hours and team member availability	Yes	No: you can book any chosen time
Default duration	Based on calendar settings	30 minutes (adjust start and end times if needed)
Available when booking via	Calendars, Opportunities, Contacts	Calendars and Contacts only
Best for	Normal scheduling	Booking outside set availability (get approval from the appointment owner first)

How Do I Book an Appointment via Calendars?

1. **Navigate to Calendars.** Go to the **Calendars** option in the left menu of your Gym Lead Machine account.
2. **Initiate the appointment booking.** Click the **+ New** button in the upper right corner.
3. **Select or add a contact.** In the pop-up window, search for and select the contact for whom you want to book an appointment. If the contact isn't in Gym Lead Machine yet, click **Add new** to enter their information.
4. **Choose the correct calendar.** Select the appropriate calendar for the appointment.
5. **Assign a team member (optional).** To assign a specific team member, use the **Team Member** field. If left on **Calendar Default**, the system will display the first available slots for all team members assigned to that calendar. Selecting a specific team member updates the available time slots to reflect their availability.
6. **Select the appointment type (Standard or Custom).** You can toggle between **Standard** and **Custom** options below the Date and Time fields.
 - **Standard Appointment:** Respects the office hours set in the calendar settings and the availability of the selected team member.
 - **Custom Appointment:** Allows you to override office hours and team member availability, letting you book an appointment for any chosen time. Be sure to have approval from the appointment owner before booking a custom slot.

7. **Set the date and time.** For Standard appointments, select an available date and time from the provided slots. For Custom appointments, use the date and time menus to create the desired appointment slot. Remember, all custom appointments default to 30 minutes, so adjust the start and end times if necessary.
8. **Finalize the appointment.** Click the blue **Book Appointment** button at the bottom right of the pop-up to save the appointment.

How Do I Book an Appointment via Opportunities?

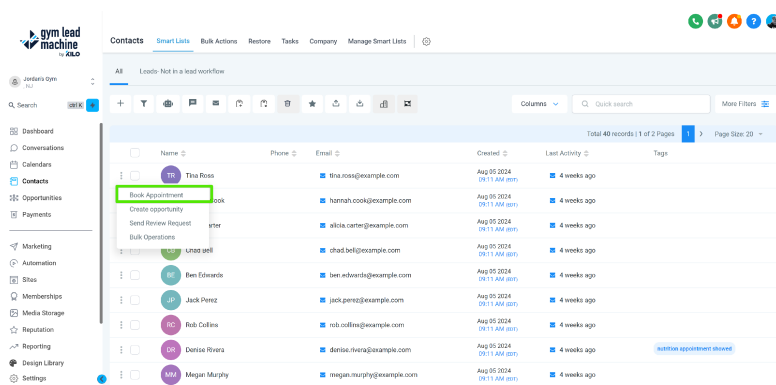
1. **Navigate to Opportunities.** Go to the **Opportunities** option in the left menu of your Gym Lead Machine account.
2. **Find and select the opportunity card.** Search for or locate the opportunity card for the contact needing the appointment.
3. **Initiate the appointment booking.** Click the gray calendar icon at the bottom of the opportunity card.

4. **Confirm the contact and select a calendar.** The system will automatically assign the appointment to the selected contact. First, choose the appropriate calendar.
5. **Choose the team member assignment.**

- **Round Robin:** This default option provides the first available appointment slots and distributes them according to the priority settings in Calendars.
 - **Pick Team Member:** Allows you to select a specific team member for the appointment.
6. **Select a time slot.** Pick one of the available time slots.
- Note:** Scheduling through Opportunities only supports Standard appointment slots and does not allow booking outside user availability. If you need to book outside availability, use the Calendars or Contacts options instead.
7. **Save the appointment.** Click the **Book Appointment** button in the bottom right of the pop-up to save the appointment.

How Do I Book an Appointment via Contacts?

1. **Navigate to Contacts.** Go to the **Contacts** option in the left menu of your Gym Lead Machine account.
2. **Find and select the contact.** Search for the contact needing an appointment.
 - For quick booking, click the three dots next to the contact's name and select **Book Appointment**.



- Alternatively, if you are in the contact's profile, click the **Appointments** icon on the far right (vertical menu) and then click **+ Add New**.
3. **Confirm the contact and select a calendar.** The system will automatically assign the appointment to the selected contact. First, choose the appropriate calendar.
 4. **Assign a team member (optional).** To assign a specific team member, use the **Team Member** field. If left on **Calendar Default**, the system will display the first available slots for all team members assigned to that calendar. Selecting a specific team member updates the available time slots to reflect their availability.
 5. **Select the appointment type (Standard or Custom).**
 - **Standard Appointment:** Respects office hours and user availability.

- **Custom Appointment:** Allows booking outside of these constraints. Use the Custom option to manually set a date and time.

6. **Set the date and time.** For Standard appointments, select an available date and time. For Custom appointments, use the menus to create a specific appointment slot. Adjust the duration as needed if it differs from the 30-minute default.

7. **Finalize the appointment.** Click the blue **Book Appointment** button in the bottom right of the pop-up to save your settings.

By using these methods, you can efficiently book appointments for contacts within Gym Lead Machine, ensuring that your team's schedule is well-organized and aligned with your gym's operational needs.

If you have questions about booking appointments in Gym Lead Machine, our Support team is happy to help. Reach us at hello@usekilo.com.

- Tags
- [Gym Lead Machine](#)