

REBEL SOFTWARE · RebelPSA

Scheduling User Guide

Calendars, Availability & Booking Pages

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1. About This Guide

This guide covers the Scheduling module of RebelPSA — calendars, agent availability, time off, external calendar syncing, and public booking pages. It's relevant to every technician (everyone has working hours and a calendar) and especially to dispatchers, supervisors, and anyone who books appointments or manages coverage during absences.

Tip. RebelPSA's internal calendars are always the source of truth. Everything works — availability, time off, booking — even if you never connect an external calendar at all. Connecting Microsoft 365 or Google Calendar layers synchronization on top; it's never a requirement.

2. Calendars: Personal, Group & Conflict

Calendar Type	What It's For
Personal	Your own individual calendar — your appointments, ticket visits, and anything you add manually.
Group	A team calendar (Sales, Marketing, Support, etc.), automatically seeded from your organization's team structure.
Conflict	A calendar (internal, or a connected external one) whose busy time blocks you from being scheduled elsewhere, without exposing any of its actual content to anyone — including supervisors.

Tip. A Conflict calendar is the one place in Scheduling that's always fully private. Even a supervisor with full-detail access to every other calendar sees only the resulting busy blocks from your conflict calendar — never what's actually on it.

3. Your Working Hours

Every agent has a weekly working-hours template — the days and hours you're normally available, in your own time zone. If you haven't set one, you automatically inherit your organization's default business hours.

- Set different start/end times for each day of the week or mark a day as fully non-working.
- Your working hours are the foundation every availability calculation and booking page slot is built from — nothing schedules you outside them.

4. Time Off & Holidays

Enter time off against your own calendar by date range, with a type: PTO, Sick, Holiday, Training, or Other. Partial-day time off is supported too.

Tip. Time off you enter is automatically marked Approved today — there's no separate approval step to wait on yet. Approved time off immediately blocks you from being scheduled or shown as available for that window.

Your organization also maintains a shared Holiday Calendar — holidays entered there block availability for every agent at once ("closed July 4th") and render distinctly on the grid so they're never confused with an individual's personal time off.

5. The Availability Grid

The Availability Grid shows free/busy time across your team, for whatever date range you're looking at. It's built by combining every relevant input for each agent:

- Working hours (or lack thereof, outside them)
- Company holidays
- Approved time off — shown with its actual type ("PTO until Monday"), not just as anonymous busy time
- Internal calendar events, including anything RebelPSA itself has scheduled (like a ticket visit)
- Busy time synced in from a connected external calendar
- Any conflict-calendar blocks

What you personally see on the grid depends on your access level for each calendar (see Section 6) — someone without elevated access sees a plain busy block, while a dispatcher or supervisor with full-detail access can see the specific reason (working hours boundary, holiday, time off, a real event).

Tip. The grid is always built from RebelPSA's own data — it never makes a live call out to Microsoft 365 or Google while you're looking at it. This keeps it fast, and means it still works (showing the last-synced picture) even if an external provider is temporarily down.

6. Sharing Your Calendar

How much of your calendar someone else can see is the highest of three independent layers — nothing you do at one layer can accidentally reduce what another layer already grants:

Layer	How It Works
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Tenant default	Everyone at your organization can see Free/Busy for every active Personal and Group calendar, by default.
Owner share grants	You can personally grant a specific person more visibility into your calendar — Free/Busy, Titles Only, Full Details, or Editor — the same familiar model as sharing an Outlook calendar.
Role permissions	Dispatchers and supervisors with the appropriate role can see full detail across every calendar without needing an individual grant from each person.

Group calendars default to full detail for their own team's members. Conflict calendars, as noted above, are the one exception that stays private at every layer, including role-based full-detail access.

7. Connecting Microsoft 365 or Google Calendar

Connecting an external calendar keeps RebelPSA aware of your busy time from Outlook or Google without ever exposing what those appointments are.

- **Privacy by design** -- for anything that isn't a RebelPSA-created event, only the time window and busy/tentative/out-of-office status are ever synced in. The subject, description, attendees, and location of a personal or external-only appointment never touch RebelPSA.
- **Automatic, ongoing sync** -- once connected, your busy time refreshes on a short interval (a matter of minutes) in the background. A "last synced" timestamp is always visible on the connection, so you can tell at a glance how fresh the data is.
- **Administrator setup** -- connecting Microsoft 365 involves your administrator scoping access to just the mapped agents (a security safeguard configured during setup), and connecting Google Calendar follows the same pattern. Both are managed from the Integrations area, not by each individual agent.

Important. A ticket-linked visit created in RebelPSA is authoritative. If you edit that event's time directly in Outlook or Google instead of in RebelPSA, the change is treated as drift and will be automatically reverted back to match RebelPSA on the next sync. Always reschedule a platform-created event from within RebelPSA itself.

8. Scheduling a Ticket Visit

When a ticket needs a scheduled visit or work window, it's created as a platform-managed event tied directly to that ticket:

- The ticket gains a Schedule tab showing its scheduled visit windows with status chips.
- The event appears on the assigned agent's calendar inside RebelPSA, and — if they have an external calendar connected — pushes out to their Outlook or Google calendar too, with full details, since it's a

platform-managed event rather than an external-only appointment.

- Closing or deleting a ticket with a future scheduled visit prompts you to decide whether to cancel or keep the linked event.

9. Public Booking Pages

A Booking Page is a public, no-login page where anyone — a prospect, a customer — can book time directly against real availability. (Typical examples: "30 minutes with a sales specialist" or "request an emergency on-site visit.")

Setting Up a Booking Page

- **Target** -- who the page books against: a specific individual, a team, a queue, or a Service Board.
- **Assignment strategy** -- how the specific agent is chosen when the target is a group: Round Robin (default), Least Loaded (whoever has the fewest booked hours in the window), or Max Availability (whoever owns the specific slot chosen).
- **Outcome** -- what happens on booking: just create a calendar event, create an event plus a Help Desk ticket, or create an event plus a CRM activity.
- **Meeting types** -- each with its own duration, buffer time before/after, minimum lead time (how soon someone can book), and booking horizon (how far in advance someone can book).

What the Booker Experiences

- They open the page and pick a meeting type.
- Available slots are generated live from the real availability engine for the page's target.
- They fill in their details and confirm a slot.
- They receive a confirmation email with a secure link to cancel or reschedule.

Tip. *Booking pages are protected against abuse with rate limiting, an optional CAPTCHA, and a configurable daily booking cap — and every page renders under your organization's own branding.*

10. Time-Off Coverage & Reassignment

When someone has time off, a manager can open a Coverage view for that person and date range to make sure nothing is left unattended:

- Every open ticket assigned to them, with status, priority, and SLA (Service Level Agreement) posture
- Any scheduled platform events falling in that window
- A bulk-reassign action — select items, pick a target person, and see that person's availability before you commit

Every reassignment made from the coverage view writes to the normal audit trail for whatever it touched, exactly as if it had been reassigned the usual way.

11. Common Workflows

Setting up your calendar for the first time

- Set your weekly working hours (or confirm the inherited default looks right).
- Connect Microsoft 365 or Google Calendar if you want your existing appointments to count toward your busy time.
- Review your calendar sharing settings if you want specific colleagues to see more than the default Free/Busy view.

Booking a ticket visit with a customer

- From the ticket, schedule the visit — this creates a platform-managed event for the assigned agent.
- Confirm it appears correctly on the ticket's Schedule tab and on the agent's calendar.
- If the time ever needs to change, reschedule it from RebelPSA rather than from the agent's Outlook or Google calendar directly.

Covering for a technician who's out

- Open the Coverage view for that person's time-off window.
- Review their open tickets and any scheduled events falling in that window.
- Bulk-reassign what needs coverage to an available teammate.

12. Quick Reference & Glossary

Term	Meaning
Working Hours Template	Your weekly pattern of available days and hours.
Conflict Calendar	A calendar whose busy time blocks your availability, kept fully private even from supervisors.
Free/Busy	The lowest visibility level — others see only whether you're busy, not why.
Platform-Managed Event	An event created inside RebelPSA (such as a ticket visit) that is authoritative — external edits to it are reverted.
Shadow Sync	The background process that pulls busy/free time from a connected external calendar without ever storing its actual event details.

Term	Meaning
Booking Page	A public, no-login page where someone can book time directly against live availability.
Assignment Strategy	The rule a booking page uses to pick an agent when the target is a team, queue, or board: Round Robin, Least Loaded, or Max Availability.
Coverage View	The panel a manager uses to see and reassign an absent person's open work.