Teamup Integration

What the AI can do

Summary

Teamup Integration connects **Teamup** (shared calendar platform) with **Newo Platform**.

It enables:

- Checking real-time availability slots across configurable date windows
- Booking appointments with automatic sub-calendar assignment
- Cancelling existing appointments
- Auto-detection of sub-calendars during setup
- Auto-provisioning of booking/cancellation scenarios to the workflow canvas

This integration is designed for **businesses and teams** who need **automated appointment scheduling through a conversational AI agent** (voice or chat) using Teamup as their calendar system.

Common use cases

- When a client asks about available slots → Check Teamup calendar for free time slots within the configured availability window
- When a client wants to book an appointment → Create an event in the Teamup calendar with title, notes, and duration
- When a client wants to cancel an appointment → Delete the event from the Teamup calendar by event ID
- When a conversation starts → Optionally preload nearest available slots into the agent's prompt context
- When the project is published → Auto-detect sub-calendars and configure booking/cancellation scenarios

Features at a glance

Feature	Supported	Notes
Check Availability	✅	Configurable window (default: 7 days) and slot duration
Book Appointment	✅	With title, notes, duration; auto-assigns sub-calendar
Cancel Appointment	✅	By event ID via DELETE request
Silent Availability Preload	✅	Optional auto-check on conversation start
Sub-Calendar Auto-Detection	✅	Fetches active sub-calendars during setup
Canvas Scenario Provisioning	✅	Auto-adds Speed-to-Lead, Cancellation, and Scheduling scenarios
Configurable Timezone	✅	IANA timezone for all date/time operations
Configurable Slot Duration	✅	Default 30 minutes, configurable per project
Rescheduling	❌	Cancel + rebook workflow (no direct reschedule API)

Multi-Location Support	❌	One sub-calendar per instance; use multiple instances
Webhook Support	❌	No inbound webhook handling

Before You Start

Before installation:

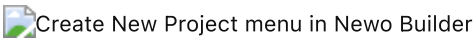
- Active **Teamup** account with API access
- **Teamup API Key** (request at https://teamup.com/api-keys/request)
- **Teamup Calendar Key** (the `ks...` key from your calendar URL that determines permission level)

Setup

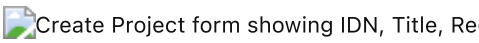
Create the Newo project

If this project already exists in **Newo Builder**, skip this subsection and continue with the integration-specific settings below.

1. In **Newo Builder**, open the projects list and click **Create Project** (or **Create New Project** from the top-right menu).

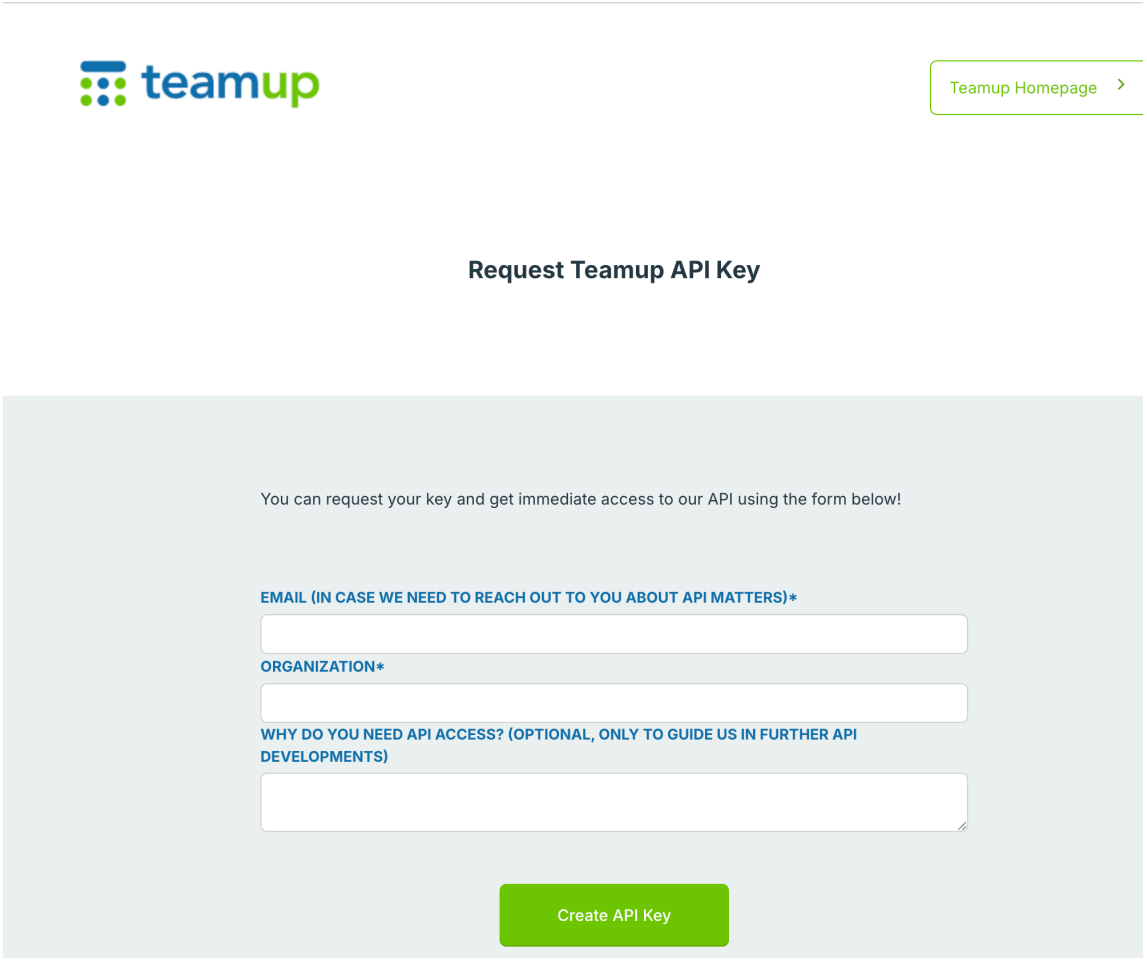

Create New Project menu in Newo Builder

2. Fill **IDN** and **Title**. The exact names do not matter; use any clear names your team will recognize.
3. In **Registry**, choose the release channel:
   - **staging** — the newest module fixes appear here first. Use it when you need the latest fix, but expect possible unfinished changes.
   - **production** — the final stable version for live projects.
4. In **Module**, select the module for this integration.


Create Project form showing IDN, Title, Registry, and Module fields 5. Leave **Module version** on **Latest version** unless support tells you to pin a specific version, then click **Create**.

3.1 Step 1 — Get Teamup API Key

1. Go to **https://teamup.com/api-keys/request**
2. Fill in the form: your email, organization name, and optionally describe the use case
3. Click **Create API Key**
4. Copy the API key and store it securely

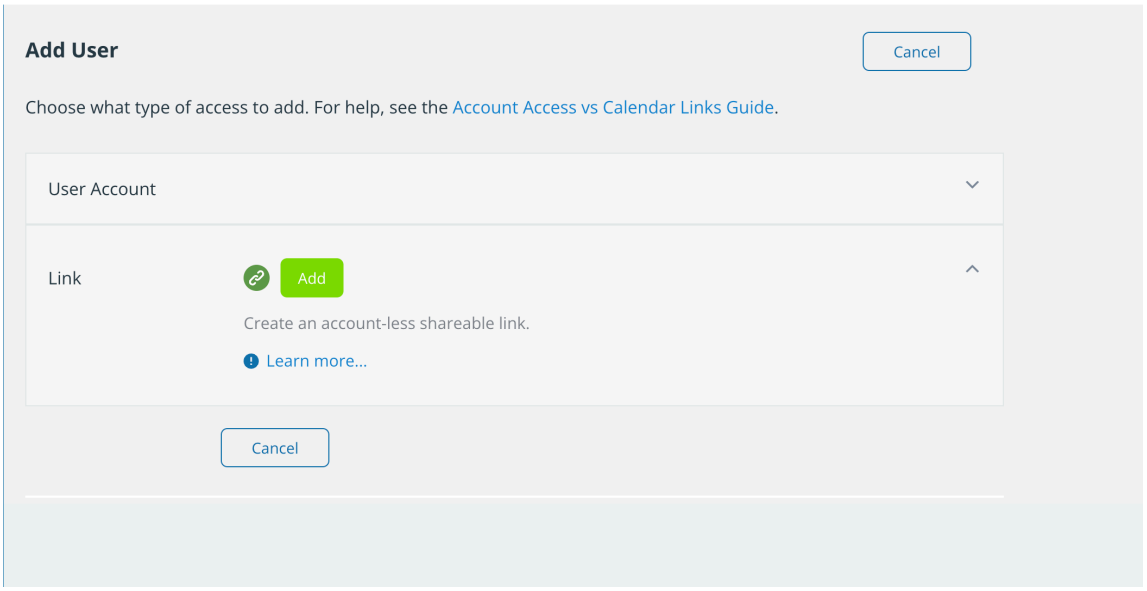


3.2 Step 2 — Create a Calendar Link with Modify Permissions

The Calendar Key (`ks...` format) controls API access scope and permissions. You need a key with **Modify** permission for booking and cancellation to work.

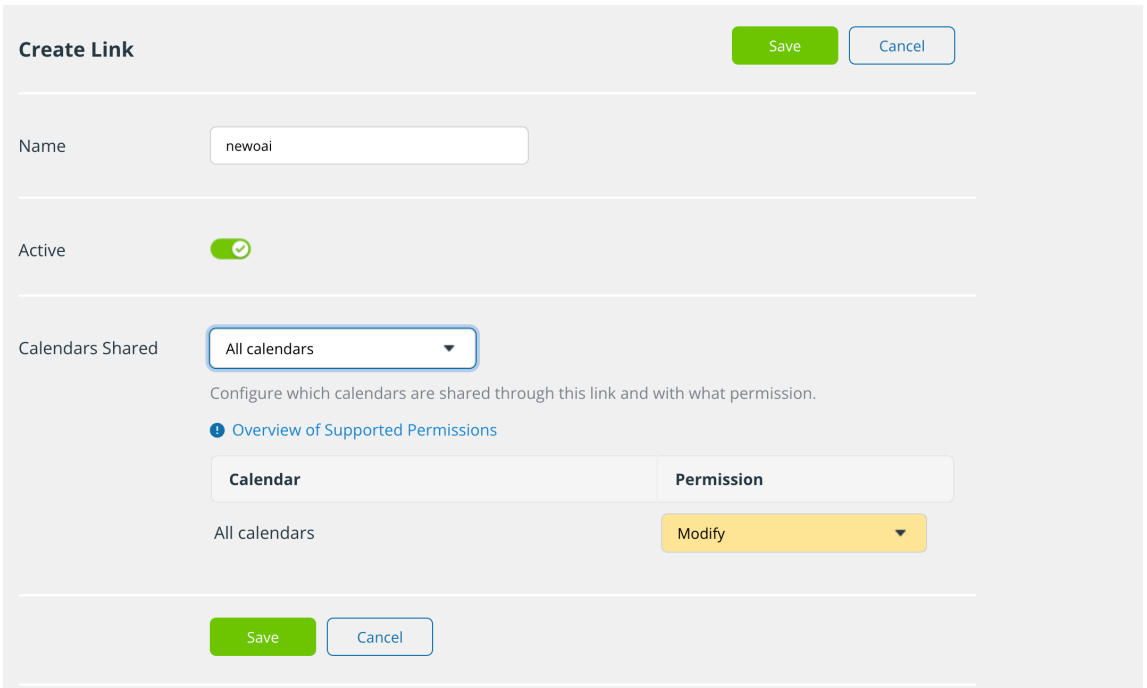
1. Open your Teamup calendar
2. Go to **Settings** (gear icon) → **Sharing**
3. Click **Add User** → expand the **Link** section → click **Add**

Test

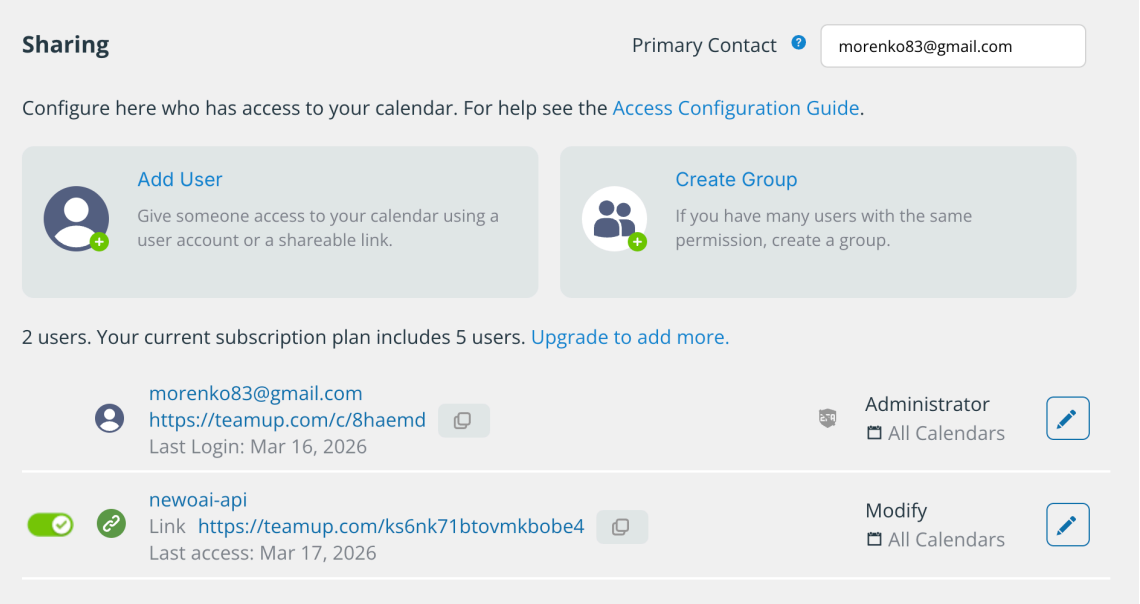


4. In the **Create Link** dialog:
    - Set a **Name** (e.g., `newoai`)
    - Ensure **Active** is toggled on
    - Under **Calendars Shared**, select **All calendars** (or specific ones)
    - Set **Permission** to **Modify** (required for booking/cancellation)
    - Click **Save**

Test



5. After saving, the calendar key appears in the Sharing list as a URL:
   `https://teamup.com/ks6nk71btovmkbobe4`
   - The part after `/` is your **Calendar Key**: `ks6nk71btovmkbobe4`



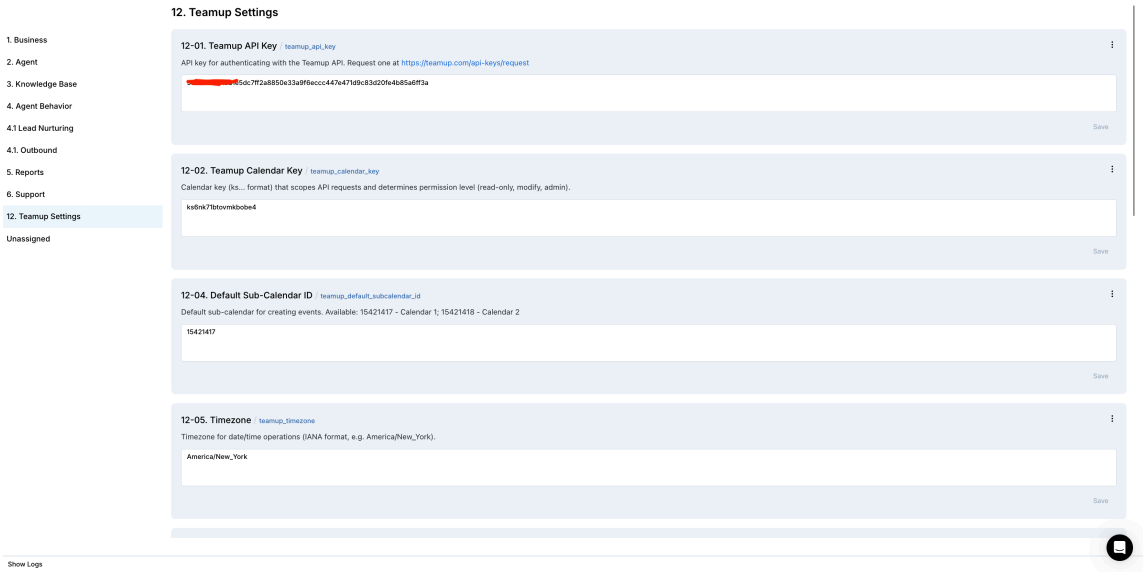
> ***Permission levels:***
>
> - ***Read-only*** *— only availability checking will work*
> - ***Modify*** *— availability, booking, and cancellation all work*
> - ***Admin*** *— full access including calendar settings*

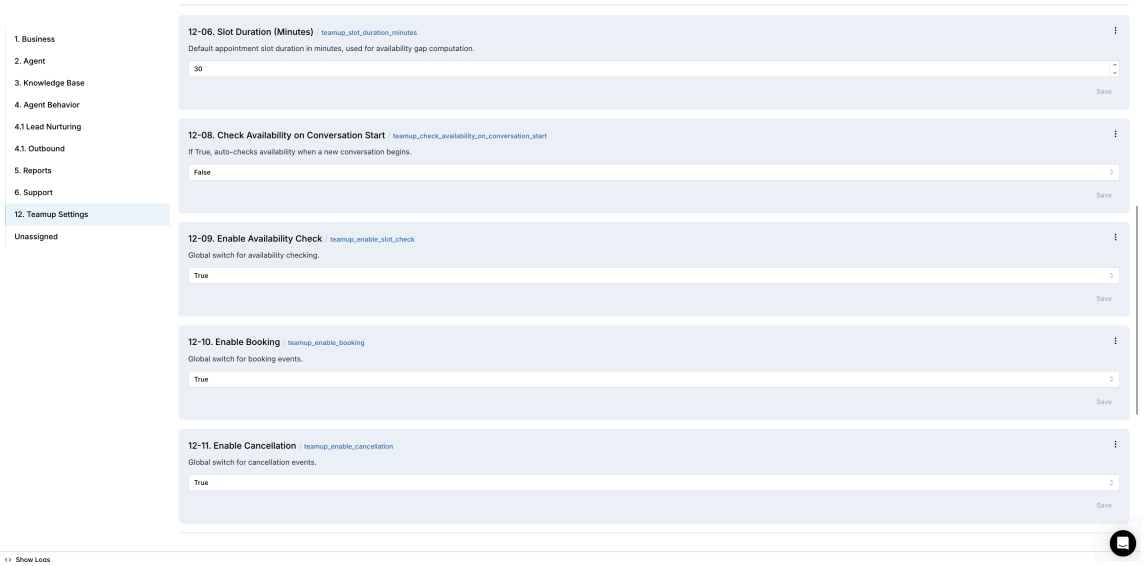
3.3 Step 3 — Connect in Newo Platform

1. Open **Newo → Projects**
2. Navigate to **Builder / Attributes** → section **12. Teamup Settings**
3. Set the required attributes:

Attribute	Required	Description
`teamup_api_key`	✅	API key from Step 1
`teamup_calendar_key`	✅	Calendar key (`ks...`) from Step 2
`teamup_base_url`	❌	API base URL (default: `https://api.teamup.com`)
`teamup_default_subcalendar_id`	❌	Default sub-calendar ID for events. Auto-detected if only one exists
`teamup_timezone`	❌	IANA timezone (default: `America/New_York`)
`teamup_slot_duration_minutes`	❌	Slot duration in minutes (default: `30`)

`teamup_show_for_days`	❌	Availability window in days (default: `7`)
`teamup_check_availability_on_conversation_start`	❌	Auto-check availability on new conversation (default: `False`)
`teamup_enable_slot_check`	❌	Enable availability checking (default: `True`)
`teamup_enable_booking`	❌	Enable booking capability (default: `True`)
`teamup_enable_cancellation`	❌	Enable cancellation capability (default: `True`)
`teamup_setup_scenarios`	❌	Auto-add default scenarios to canvas (default: `True`)
`teamup_override_agent_attributes`	❌	Override ConvoAgent booking schemas and feature flags (default: `True`)





4. Click **Save + Publish All**
5. On publish, the SetupFlow automatically:
    - Creates the `teamup_connector` connection
    - Sets ConvoAgent booking/availability/cancellation feature flags
    - Injects payload schemas for availability, booking, and cancellation tools
    - Fetches active sub-calendars from Teamup API
    - Auto-selects default sub-calendar if only one exists
    - Provisions Speed-to-Lead and Cancellation scenarios to the workflow canvas

How to use the integration

This section explains how the integration works, how to configure automation, and how to test it.

4.1 How the Integration Works

The integration operates based on **Triggers and Actions** via the event-driven system.

- A **Trigger** is a system event that starts a flow
- An **Action** is the API operation performed in Teamup

Where to test

Testing can be done through the **Newo conversation interface** (chat or voice channel) by interacting with the agent.

How to test that everything works

To test the integration:

1. **Setup**: Publish the project and verify sub-calendars are detected (check logs for `[SETUP] Found N sub-calendars`)
2. **Check Availability**: Ask "What times are available this week?" — verify the agent returns grouped time slots by date
3. **Book Appointment**: Ask "Book me at 2pm tomorrow" — verify the event appears in your Teamup calendar

4. **Cancel Appointment**: Ask "Cancel my booking" — verify the event is removed from your Teamup calendar

If no action occurs:

- Ensure `teamup_api_key` and `teamup_calendar_key` are set correctly
- Verify the calendar key has **modify** or **admin** permissions (not read-only)
- Confirm `teamup_default_subcalendar_id` is set (auto-detected if single sub-calendar)
- Ensure `teamup_enable_slot_check`, `teamup_enable_booking`, `teamup_enable_cancellation` are `True`
- Confirm the project was re-published after configuration changes
- Check that `teamup_override_agent_attributes` is `True` for ConvoAgent tool gating

> *Note: This integration performs real operations in Teamup. Changes made through the agent are reflected in the live calendar.*

FAQ

Q: How does availability checking work? A: The integration fetches all existing events from the Teamup calendar within the configured date range, then computes free slots by checking for gaps between booked events. Slots are grouped by date and returned in 12-hour format (e.g., "02:00 PM").

Q: What happens if no sub-calendar ID is configured? A: During setup, the integration auto-detects sub-calendars via the API. If exactly one active sub-calendar exists, it is auto-selected. If multiple exist, the user must manually set `teamup_default_subcalendar_id`. Booking will fail without a sub-calendar ID.

Q: Can I use a read-only calendar key? A: Only for availability checking. Booking and cancellation require a calendar key with **modify** or **admin** permissions. The integration checks for 401/403 errors and routes them as auth failures.

Q: Does the integration support rescheduling? A: Not directly. Rescheduling is handled via a cancel + rebook workflow: Publish All adds a "Reschedule" intent type that routes through the cancellation scenario first, then proceeds to the scheduling scenario.

Q: What timezone is used for slot computation? A: The timezone configured in `teamup_timezone` (default: `America/New_York`). All date/time parsing and slot computation uses this timezone via Python's `zoneinfo` module.

Q: What scenarios are auto-added to the canvas? A: Three scenarios (Speed-to-Lead Outbound Call, Canceling Appointment via Agent, Scheduling Appointment via Agent) and three intent types (Cancellation via Agent, Existing Client Appointment, Reschedule or Modification). Default industry-specific scenarios (beauty, home service) are removed.

Q: How is the booking stored for cancellation lookup? A: When a booking is created, ConvoAgent stores the `booking_id` (Teamup event ID) in the persona's `bookings` attribute. During cancellation, ConvoAgent retrieves the booking and passes `meta.booking_id` to the CancellationFlow.