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BOOK YOUR APPOINTMENTS



July 2023

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CONFIGURE INTEGRATIONS

Check you have any other calendars you use connected to avoid double booking

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CREATE YOUR CALENDAR

Learn how to use the scheduling system to customize your appointment types & gather their contact information

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CREATE YOUR BOOKING FUNNEL

Learn how to design the basic funnel layout needed for a smooth booking process, then customize it

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CONFIGURE YOUR WORKFLOW

Learn how to setup the basic workflow layout needed for a smooth process, then customize it

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EXAMPLE WORKFLOW

Take a peek at a workflow we have used as a reference

01

INTEGRATIONS

This guide will specifically walk through how to set up all the pieces you need for a smooth appointment process. Any user you create with admin access will have various settings to customize before booking under the calendar tab of your settings

Zoom

In your settings, you can connect directly with your zoom account to automatically pull in a new zoom link for each appointment booked - pull into messaging using the custom value `{{appointment.meeting_location}}`

Google

In your settings, you can integrate your Google account in order to sync your Google Calendar (or google meet too!) to the system, avoiding double bookings

Outlook

In your settings, you can integrate your Outlook account in order to sync your Outlook Calendar to the system - avoiding double bookings

Main Calendar Configuration

In your user settings, set the calendar in which the appointments from the system will be booked onto this selected calendar (like my work calendar)

Conflict Calendar Configuration

In your user settings, set the calendar(s) you want the system to check availability for (like picking the kids up from soccer), but won't be booked onto

The screenshot shows two overlapping settings panels. The 'Availability' panel on the left includes a 'Timezone' dropdown set to 'GMT-08:00 US/Central (CST)', a 'Working Hours' section with a weekly calendar grid where Monday, Wednesday, and Thursday are selected, and a table for Monday's hours: 10:00 AM to 12:00 PM and 02:00 PM to 04:00 PM. The 'User Preferences' panel on the right has a 'Meeting Location' dropdown menu with options for 'Zoom', 'Custom', 'Zoom', and 'Google Meet'.

Appts Calendar



2-Way Sync: Create integrated calendar

Check for Conflicts

1234@gmail.com

1234@gmail.com



Appts Calendar



Generic Tasks Cal



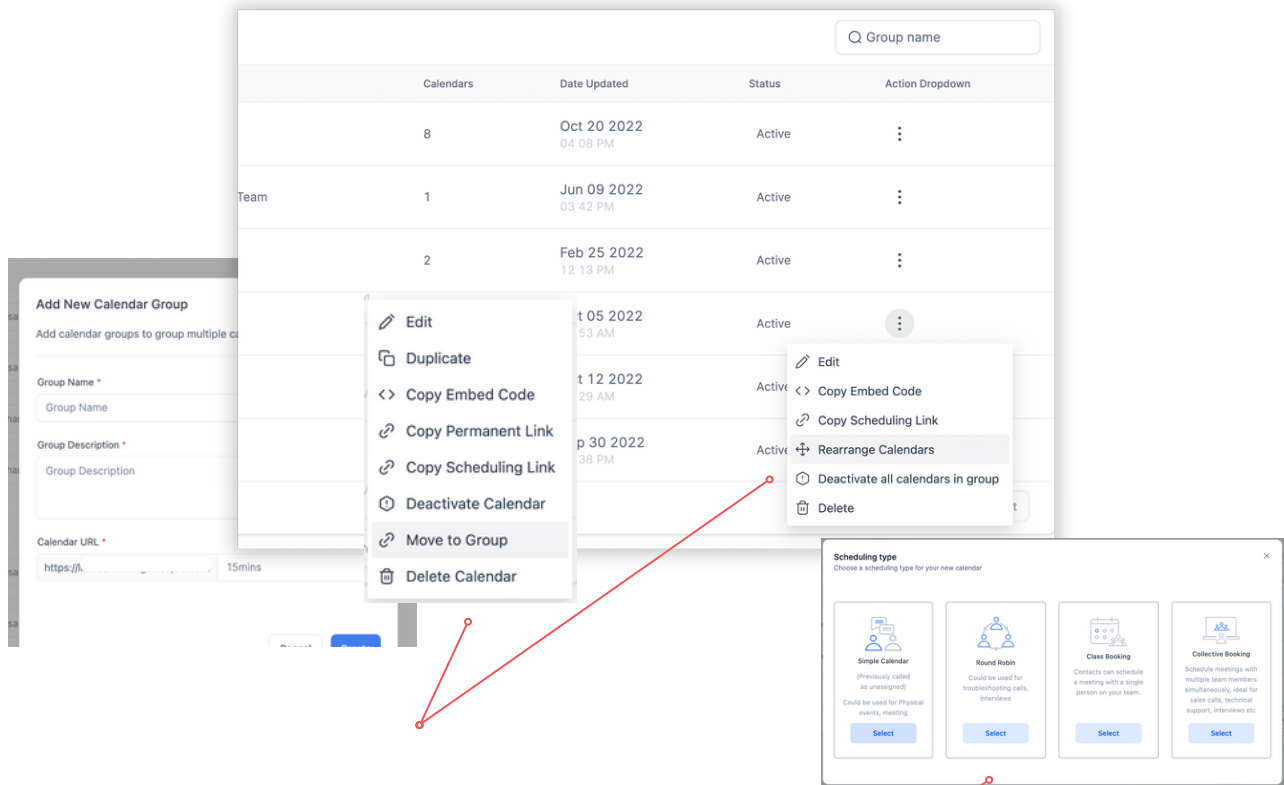
Speaker Series



Zoom

02

CREATE YOUR CALENDAR



1 Create A Group

- This is so you can organize your appointments by category, group, user, etc
- You can move them later if you need

2 Decide What Calendar Type You Need

- Round Robin – This is a normal appointment where you can add the user(s) & a contact can book with one of the users based on availability or priority
- Simple Calendar – Connect to a singular external calendar or sub-calendar with specified filtering to allow booking for an event or date range
- Class Booking – Create a calendar for a set date or range to allow your contacts to attend a group meeting of some sort, you can even set a seat cap!
- Collective – Allow for multiple users to be added to this calendar and the contact booking will be based on all of the user's availability combined, on top of the calendar settings

CALENDAR SETTINGS

Name this calendar & give it a good description so contacts know what they are getting

What users from this appointment's group should be part of this service?

Set this calendar's availability, which means that the calendar will only allow booking during the set times & based on the users availability

Do you want to accept payments for the appointments booked on this calendar?

New Calendar

Calendar name
(eg) Outbound reach
[+ Add description](#)

Select team members
Please Select

Custom URL
/widget/bookings/ my-calendar

Meeting duration
30 Minutes

Booking availability
America/Chicago (UTC-05:00)

S M T W T F S

08:00 AM to 05:00 PM

To further customize your business hours, please navigate to the advanced settings.

Accept payments

[Advanced settings](#)

Give this service calendar a path (If you don't like this one...you could put this appointment calendar on a funnel page via the calendar element to brand it to you & customize the link!)

How long is this appointment?

Advanced Settings allows you to further customize and edit your calendar

- [Meeting details >](#)
- [Availability](#)
- [Forms & payment](#)
- [Notifications & Additional Options](#)
- [Customizations](#)

CALENDAR SETTINGS

Meeting details
These are the details which will be shown in the calendar list page.

Calendar logo

Click to upload or drag and drop
SVG, PNG, JPG or GIF (max. dimensions 180x180px | max. size 2.5mb)

Calendar name
New Calendar

Description
Write description

Group

Custom URL *
/widget/bookings/ example1

Meeting invite title
{{contact.name}}

Appointment Distribution
 Optimize for availability Optimize for equal distribution

Select team members
Stephanie

Stephanie Medium priority Custom
zoom.thegl ph

Event color

Add your own custom logo to the widget

Edit this appointment calendar & give it a good description so contacts know what they are getting

Edit this service calendar a path (tip.. put this calendar on a funnel page via the calendar element to brand it to you & customize the link!)

Which users from this appointment's group should be part of this service?

Choose to round-robin booking based on availability & priority or keep it equally 50/50

Choose the color that this appointment will show up as when you view your appointments within the system

CALENDAR SETTINGS

My availability
Set your availability for the calendar here.

Availability type Standard Custom

Sun Mon Tue Wed Thu Fri Sat

Monday 08:00 AM To 05:00 PM
+ Add time

Tuesday 08:00 AM To 05:00 PM
+ Add time

Wednesday 08:00 AM To 05:00 PM
+ Add time

Thursday 08:00 AM To 05:00 PM
+ Add time

Friday 08:00 AM To 05:00 PM
+ Add time

Edit this calendar's availability, which means that the calendar will only allow booking during the set times & based on the users availability

Recurring meeting

Repeat Times to repeat

Daily

Every Day For 1 Time

If slots are unavailable?
Skip booking unavailable slots

If this appointment is only one of many, toggle on the recurring appointment option to set

- how often this appointment will repeat
- how many times this appointment will repeat
- how the software should behave if they're are no slots available for the upcoming appointments

CALENDAR SETTINGS

How often do you want to offer this appointment?
Ex. every 30 minutes

Meeting interval ⓘ

Minimum scheduling notice

Avoid someone booking too soon...
for example, they must book 12+ hours

How many appointments are you willing to have of this type each day?

Maximum bookings per day ⓘ

Buffer time

How much time do you want between these appointments?

How long is this appointment?

Meeting duration

Date range ⓘ

How far into the future can someone book...
2, 3, 4 weeks?

How many can be booked per time slot?

Maximum bookings per slot (per user) ⓘ

CALENDAR SETTINGS

Forms

Set post-scheduling form preferences.

Select form 

Default (First name, Last name, Email, Phone)

Pre-populate fields (sticky contacts)

Add Guests

Confirmation page 

Default Redirect URL

Thank you message

Thank you for your appointment request. We will contact you shortly to confirm your request. Please call our office at {{contactMethod}} if you have any questions.

Facebook pixel ID (optional)

Pixel ID

Auto-confirm new calendar meetings

Customize what questions are asked by connecting a form from the form builder. If sticky contact is not already on for your selected form, then you can choose to select it here if needed

Enable or disable the ability to allow the contact who is booking with you to add one or more guests

Control what the contact sees after they finish booking...like a specific thank you message or redirect to a specific URL...

If you use a funnel page, you can also customize the redirect in that funnel specifically

Enter your FB pixel ID to connect to ads

Enable or disable auto-confirm, alternative is in a workflow or manually

Enable or disable sending an automatic email notice to the user that the appointment is booked with, the contact that booked, and/or to a custom email address

Enable or disable Google/Outlook Calendar to send an appointment invitation to the contact

Decide if you want to assign a user to the contact when booked

Notifications & Additional Options

Configure notification and additional options

Select the type of notification

Acknowledgement email

Who should receive this notification?

Contact

Assigned user

Emails

Allow Google calendar to send invitation or update emails to attendees.

Assign contacts to their respective calendar team members each time an appointment is booked

CALENDAR SETTINGS

Customizations

Set widget style and other preferences.

Calendar widget style

Neo Classic

Choose the calendar look you prefer, Classic which is simpler or Neo which looks smoother

Decide if you want to assign a user to the contact when booked

Allow staff selection during booking

Insert custom code

Please Input

Enter any custom coding to edit or modify this appointment

Enable or disable the ability to reschedule or cancel

Cancellation and reschedule:

Allow reschedule meeting

Allow cancelling meeting

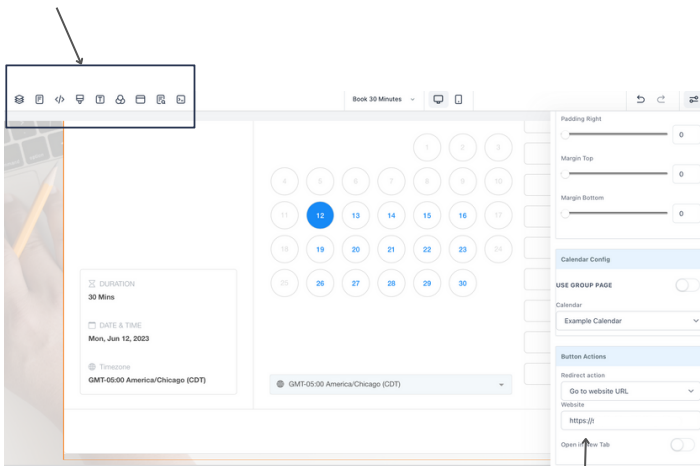
Additional notes

Phone:- {{contact.phone}}
Email:- {{contact.email}}
Need to make a change to this event?

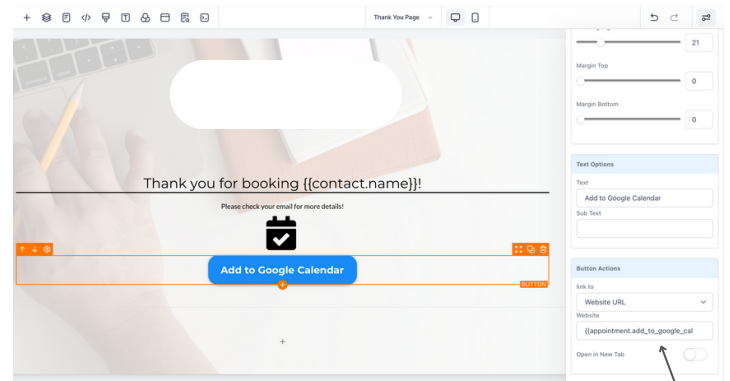
Customize the notes that appear in calendar event on the user & contacts google or outlook calendars

03

CREATE YOUR BOOKING PAGE



link to TY page



{{appointment.add_to_google_calendar}}

- 1** Create a funnel with booking page(s) by pulling in the calendar element & choosing your appointment service or toggle for the group calendar to show all services (clone and edit for thank you page)
 - Once you have the first page designed how you like it, you can clone and edit it for the thank you page, if you are using an order form for a paid product you can use the confirmation element on this page too
- 2** Don't forget about these commonly missed page settings...
 - Page Settings button – SEO Meta Data, Background, & Typography
 - Redirect Option set to your thank you page
 - Use form custom values on thank you page
 - Customize general appearances like font color, size, images, and more!
- 3** ..Or these overall funnel settings
 - Favicon – paste the link from the media library image
 - Domain – add your own domain to create a live URL
 - Chat Widget – enable chat to communicate with page visitors

04

PART 1

CONFIGURE YOUR WORKFLOW TRIGGERS

The screenshot displays a workflow builder interface. On the left, a vertical flowchart shows a trigger box labeled 'Customer Booked 30 Min. Consultation' with a sub-button 'Add New Workflow Trigger'. Below it are two action boxes: 'Internal Notification' and 'Add Tag', connected by plus signs. On the right, a configuration panel for the trigger is shown. It includes a 'CHOOSE A WORKFLOW TRIGGER' dropdown set to 'Appointment Status', a 'WORKFLOW TRIGGER NAME' field containing 'Customer Booked 30 min Consultation', and a 'FILTERS' section with three dropdowns: 'Event Type' (Normal), 'In calendar' (Example Calendar (My Appointments)), and 'Appointment status is' (confirmed). An 'Add filters' link is at the bottom.

- 1 Open Automation on the left tab – Click +Create Workflow
- 2 Open the Settings top tab to configure basic settings like sending window, from name & email address...
 - Allow multiple – enable or disable the ability for contact to go through this workflow more than once
 - Stop on response – enable or disable if the contact responds to a message then the workflow will stop for them
- 3 Under the Actions top tab, add your workflow trigger(s)
 - Trigger – Appointment
 - Filters – In Calendar & Appointment Status is "Confirmed"

04

PART 2

CONFIGURE YOUR WORKFLOW ACTIONS

The screenshot displays a workflow builder interface with a vertical sequence of actions: Confirmation Email, Wait 1 Minute, SMS Confirmation, Before 1 Week, 1 Week Reminder, and 3 Days Before. A 'Wait' configuration panel is open on the right, showing the following settings:

- ACTION NAME:** 3 Days Before
- WAIT FOR:** Event / Appointment time
- UNTIL:** When: Before, Months: 0, Days: 3, Hours: 0, Minutes: 0
- IF THE TIMING OF THIS WAIT STEP IS ALREADY IN THE PAST, HOW SHOULD THE CONTACT PROCEED?:** Skip all outbound communication actions, till next wait or Event Start Date action. (Email, sms, call and voicemail)

An arrow points from the '3 Days Before' action in the workflow to the 'Wait' configuration panel.

example for waiting until
3 days before the
appointment start time

- 1** After configuring your triggers, start adding actions
 - For example... set event start date, tag them, send confirmation & follow-up emails, SMS, or Voicemail, update or add them to a pipeline, send the user an internal notification, etc.
 - Use custom fields & values to customize messaging
- 2** Wait Steps delay actions from executing until a designated time
 - Choose & customize the "event/appointment time" step based on when you want to send reminder messages, follow-up messages, or even internal notification reminders to the user
- 3** Test & Publish Your Workflow To Make It Live

05

EXAMPLE WORKFLOW



- Here is an overview of what our normal workflow for an appointment looks like so you can get a good big picture idea but you can add or simplify it as you need

TROUBLESHOOTING TIPS

MASTERING AUTOMATION ONE STEP AT A TIME

Have You Tested It?

Run through your process as a client would with placeholder information to ensure your automation is set up how you want. Use the Status, History, & Execution log tabs to your advantage and their contact record data. You can permanently delete your contact and test again.

Have You Cleared Your Cache?

Sometimes when your browser, system, app, or other services push updates that clog up your browser cache. Clearing your cache only gets rid of the data your device has stored from the websites and apps you visit—it has no impact on your photos or the files you have saved there.

Do Your Triggers Need Additional Filters?

See what filters you can add to your workflow triggers to give more context to what your requirements are for this to fire. Just telling it to fire off of "Form Submitted" doesn't tell you WHAT form you are talking about....unless you add the "form is" filter.

Have You Sent A Loom Video To Support?

Make sure to use loom.com as a resource when communicating with the support team, they give us an immense amount of context as to what your issue is so we can get you a solution quicker.

Is Allow Multiple On?

The allow multiple toggle under workflow settings determines whether a single contact can enter your workflow more than once. Think about if this would fit your project & if you need it on temporarily for testing.

Have You Looked Through Workflow Logs?

After adding or testing a workflow you can view every step executed in chronological order for all contacts within the History tab. Under the Status tab of a workflow, you can view each contact in your flow & what step they are currently on, next execution, etc. These are so helpful when troubleshooting.

Have You Checked Your Audit Logs?

When viewing your account settings, you can scroll down on the left side menu to view various logs and changes made to contacts, custom fields, values, and so much more. This is so resourceful when looking at who, what, when, or where a change was made.

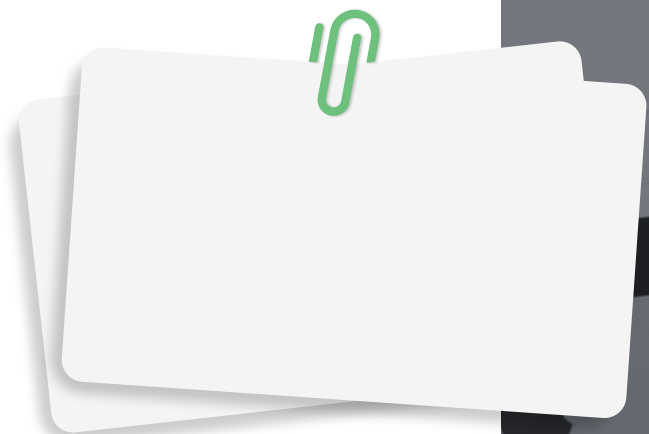
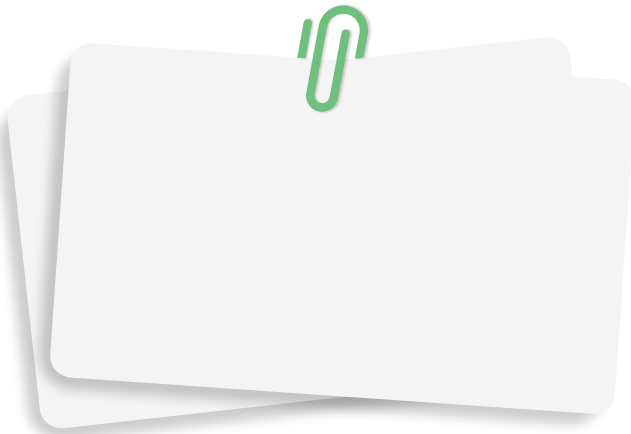
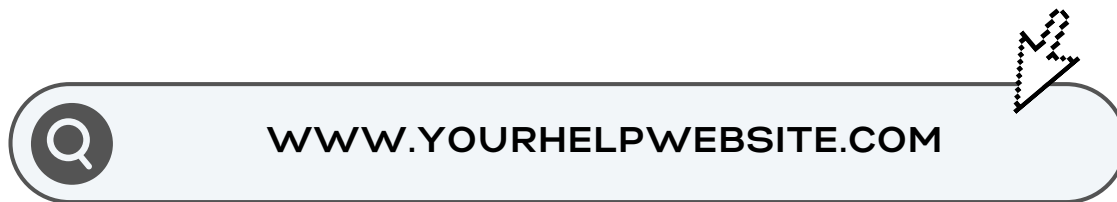
Have You Tried An Incognito Tab or Other Browser?

Sometimes when there are updates or your cache is blocking the system from functioning correctly, you may want to try testing in an incognito private browser where your cache doesn't carry over or in a new browser like Safari.

NEED MORE HELP?

CHECKOUT OUR SUPPORT OPTIONS & RESOURCES

Our team is fully dedicated to supporting you every step of the way, ensuring your success. You can review the wide range of resources and support options available to guide you through any challenges or inquiries. Don't hesitate to reach out to our team whenever you need additional assistance; we're always here to help!



ALL INFORMATION IS SUBJECT TO CHANGE AS THE SOFTWARE UPDATES AND GROWS. NEW VERSIONS OF THIS WORKBOOK WILL BE EDITED FOR UPDATES AND NEW FEATURES.

