BOOK YOUR APPOINTMENTS

July 2023

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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

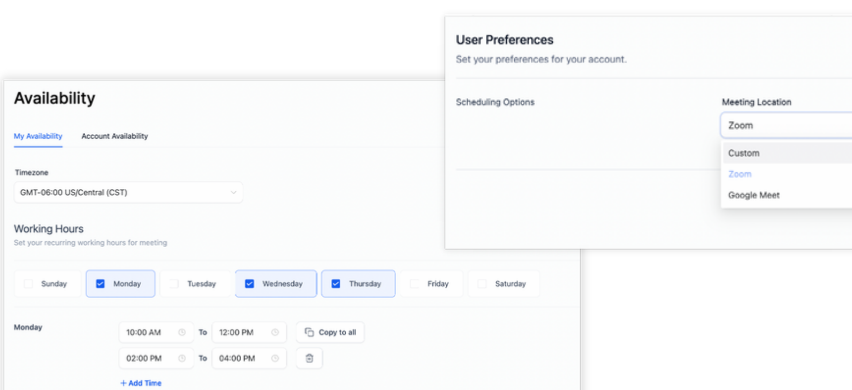
Zoom In your settings, you can connect directly with your zoom account to automatically pull in a new zoom link for each appointment booked - pull into messaging using the custom value {{appointment.meeting_location}}

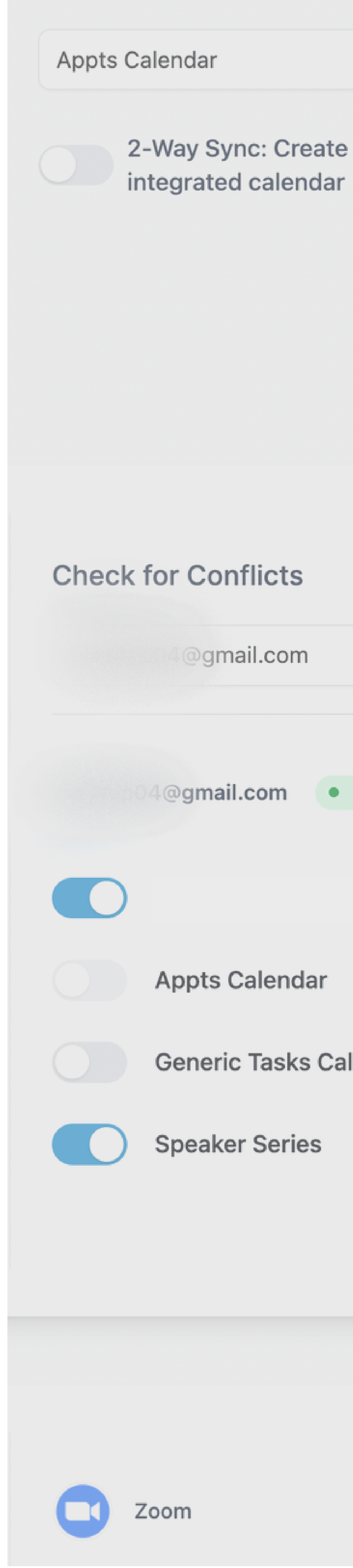
Google In your settings, you can integrate your Google account in order to sync your Google Calendar (or google meet too!) to the system, avoiding double bookings

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)

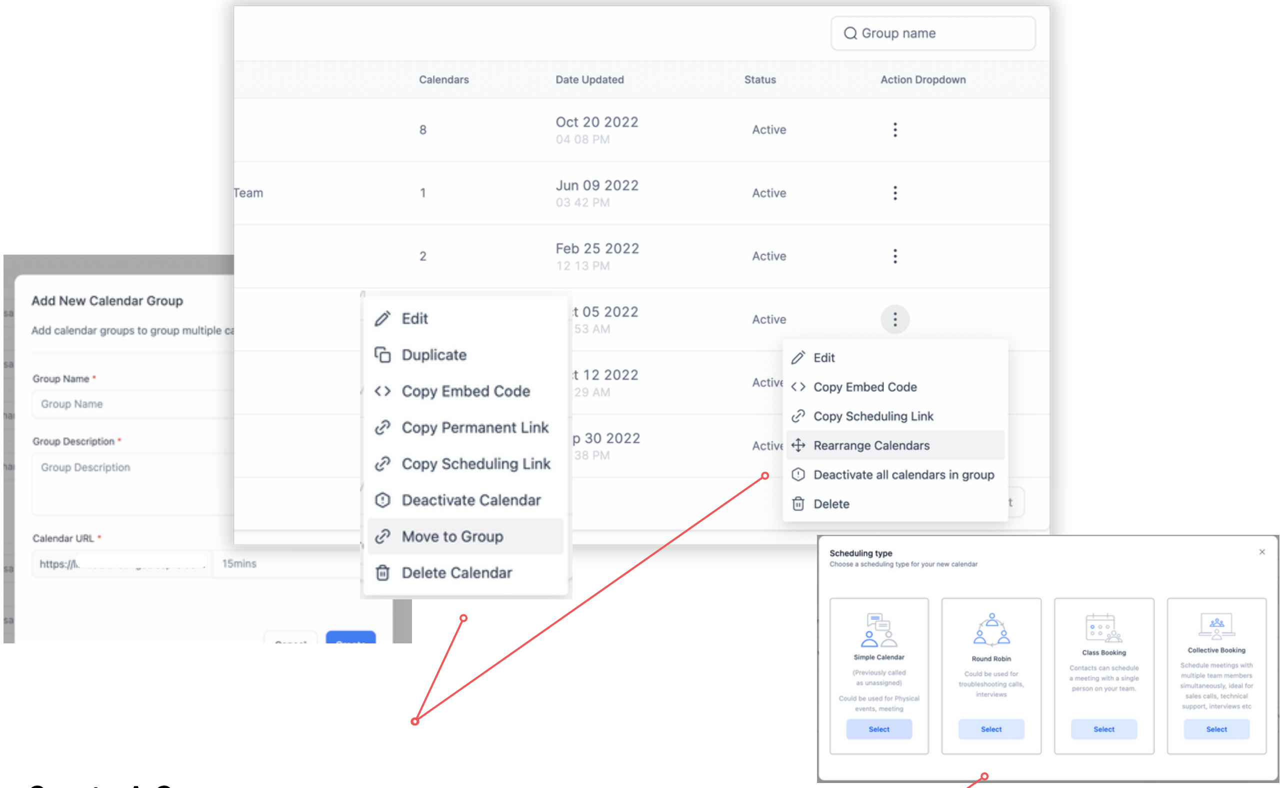
Conflict Calendar Configuration In your user settings, set the calendar(s) you want the system to check availability for (like picking the kids up from soccer), but won't be booked onto





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

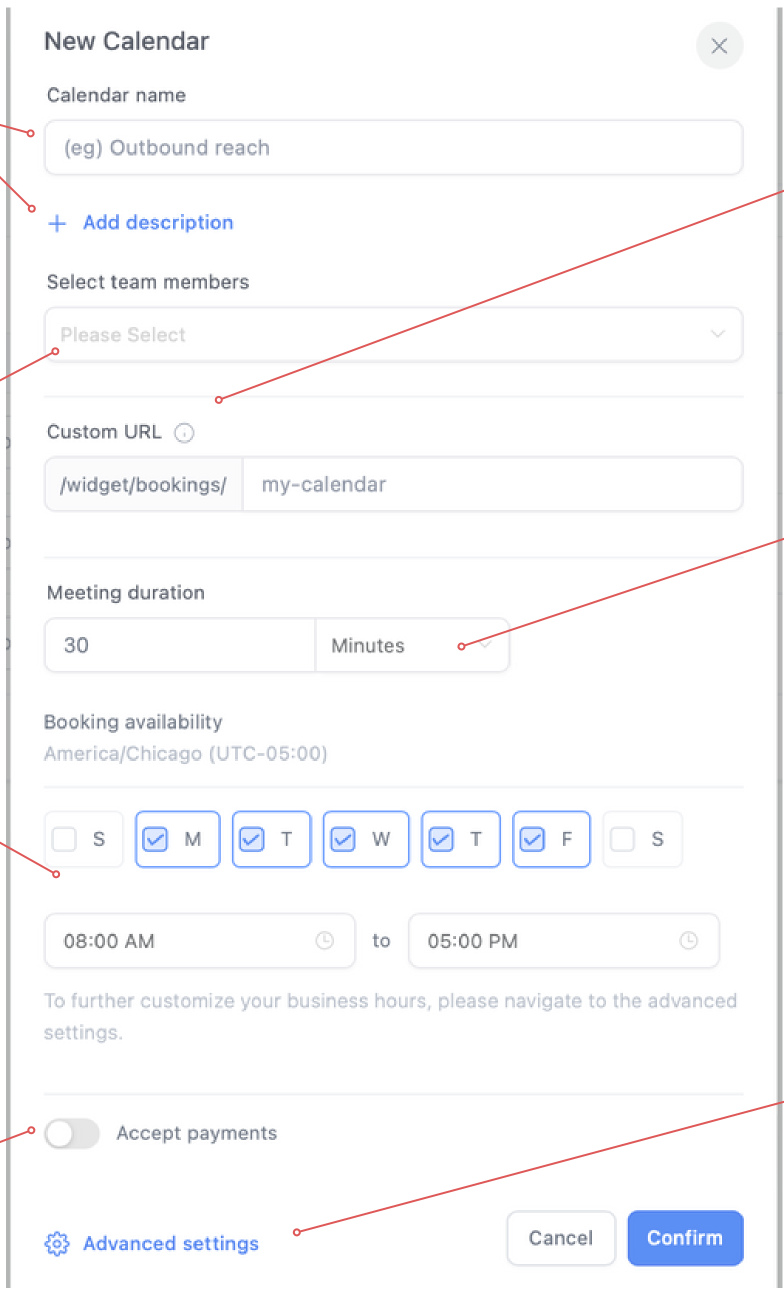
CALENDAR SETTINGS

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

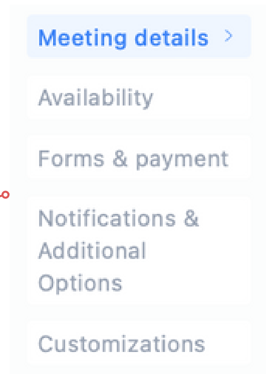
Do you want to accept payments for the appointments booked on this calendar?



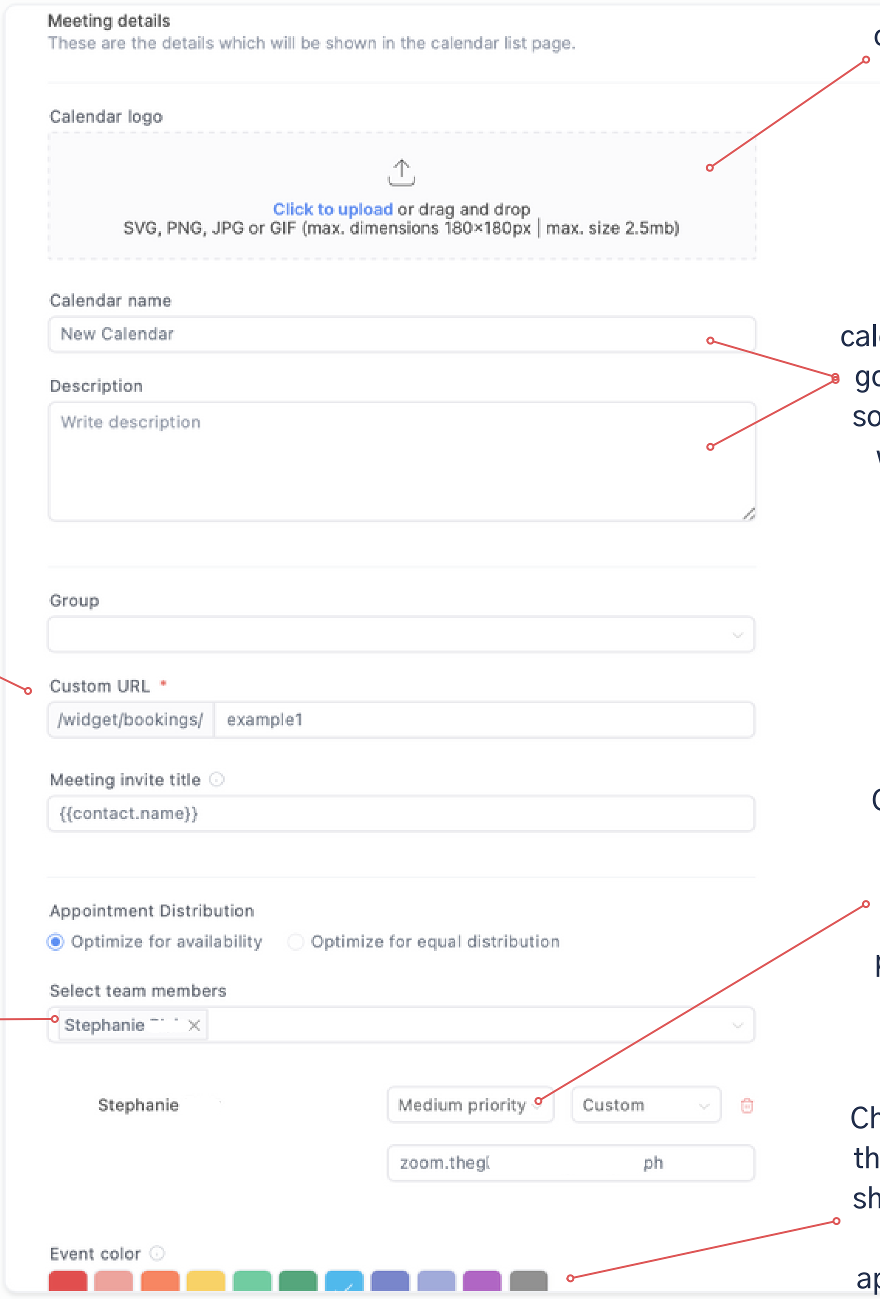
Give this service calendar a path (If you don't like this one...you could put this appointment calendar on a funnel page via the calendar element to brand it to you & customize the link!)

How long is this appointment?

Advanced Settings allows you to further customize and edit your calendar



CALENDAR SETTINGS



Add your own custom logo to the widget

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

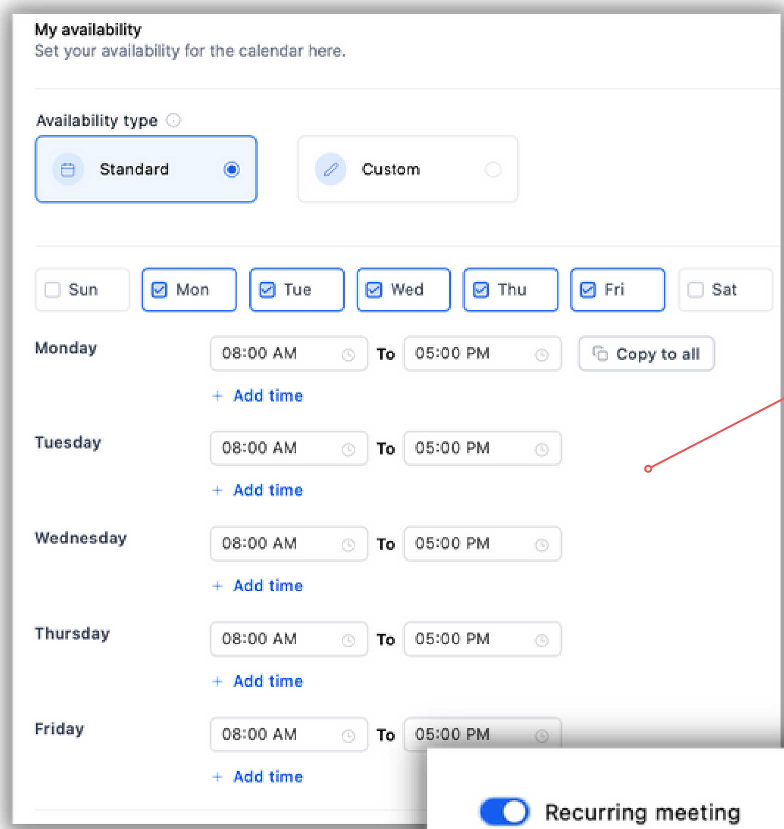
Edit this service calendar a path (tip.. put this calendar on a funnel page via the calendar element to brand it to you & customize the link!)

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

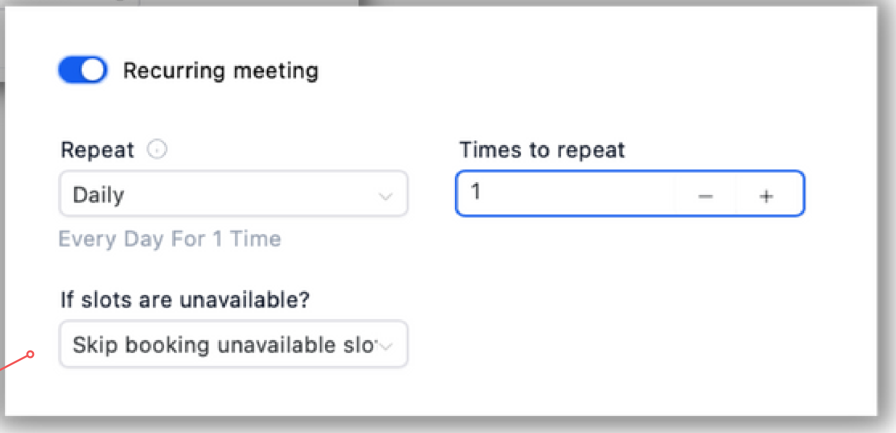
Which users from this appointment's group should be part of this service?

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

CALENDAR SETTINGS



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



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

Meeting interval

30 | Minutes

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

Minimum scheduling notice

Days

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

Maximum bookings per day

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

Buffer time

Minutes

How much time do you want between these appointments?

Meeting duration

30 | Minutes

How long is this appointment?

Date range

Days

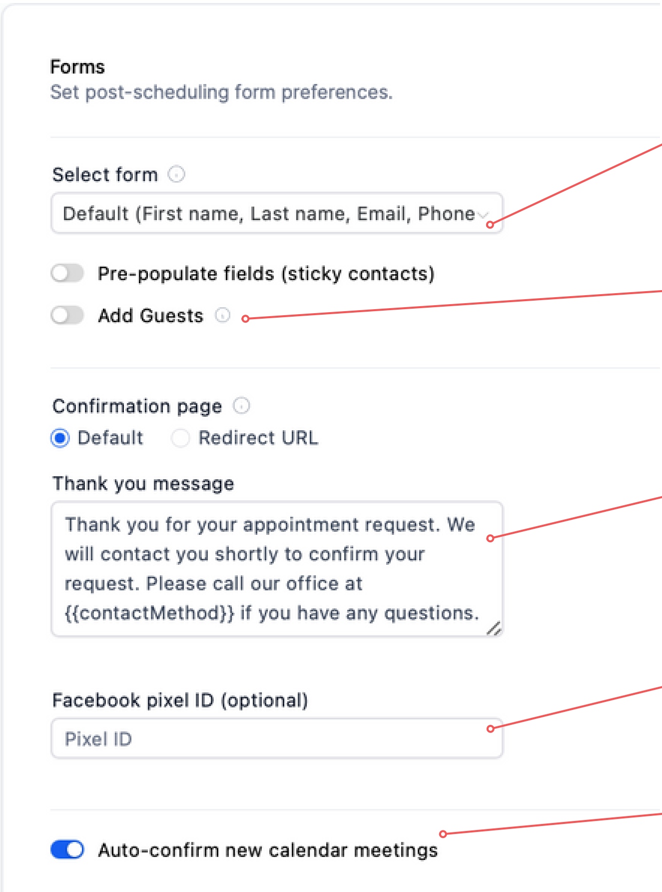
How far into the future can someone book... 2, 3, 4 weeks?

Maximum bookings per slot (per user)

1

How many can be booked per time slot?

CALENDAR SETTINGS



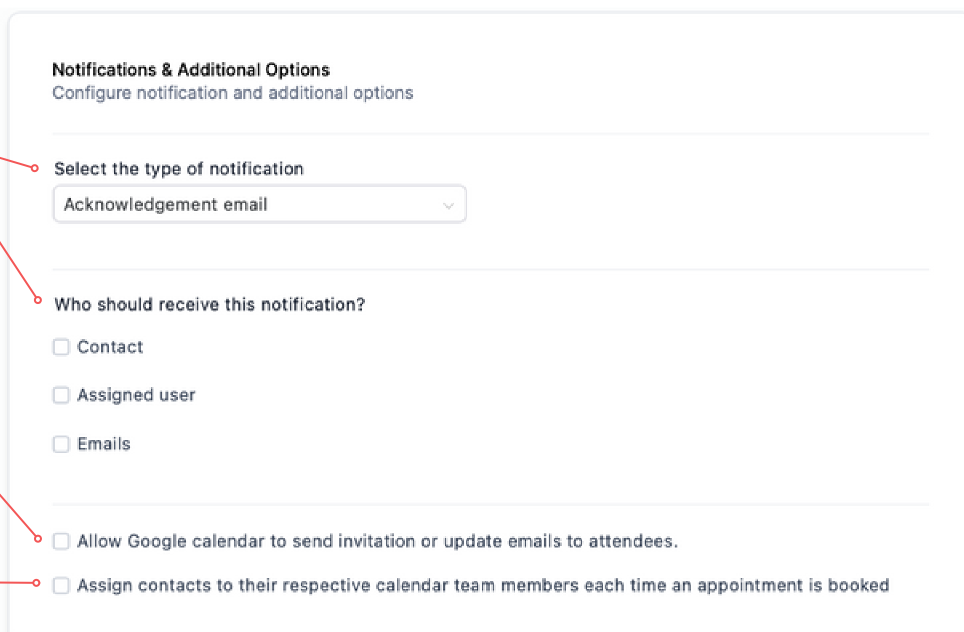
Customize what questions are asked by connecting a form from the form builder. If sticky contact is not already on for your selected form, then you can choose to select it here if needed

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

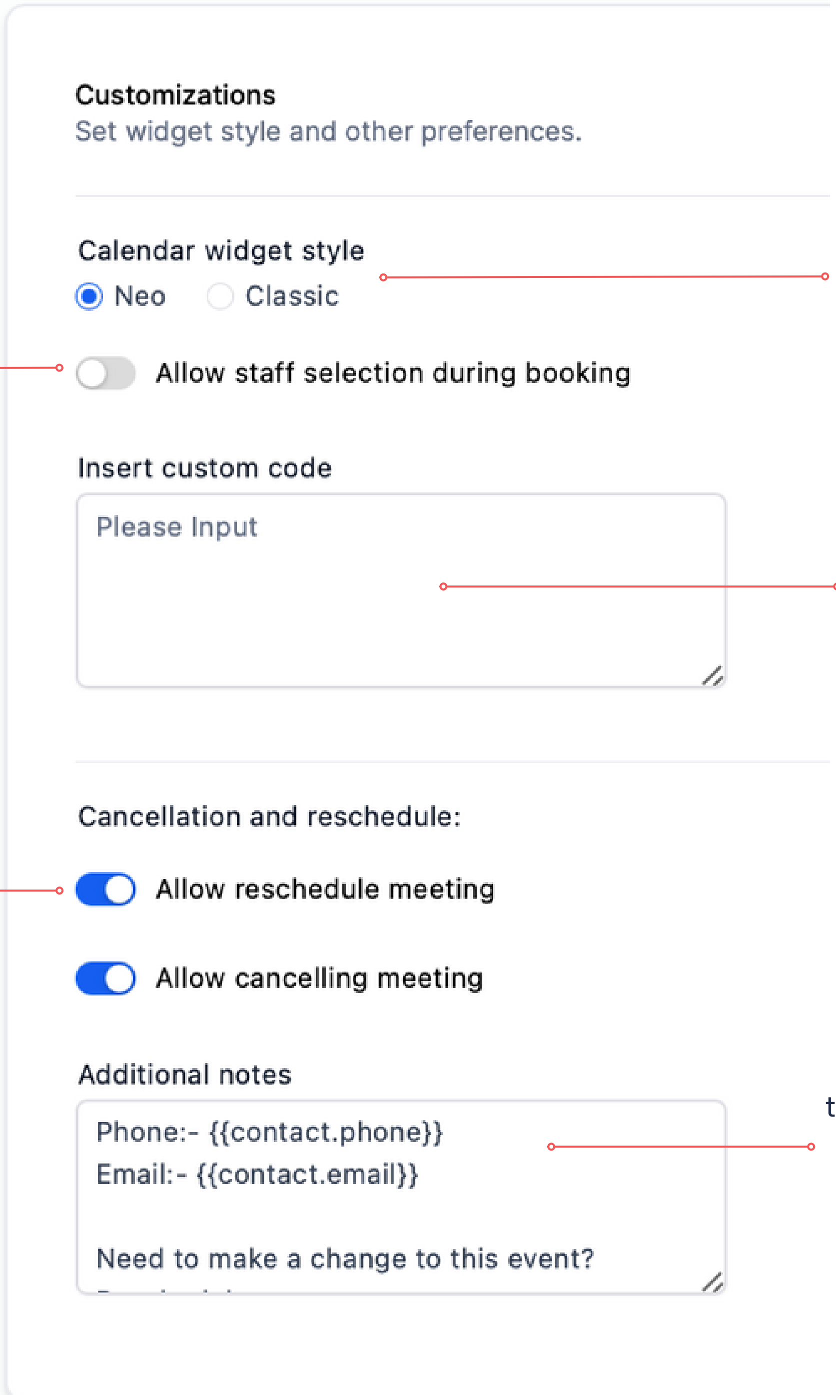


Enable or disable sending an automatic email notice to the user that the appointment is booked with, the contact that booked, and/or to a custom email address

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

CALENDAR SETTINGS



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

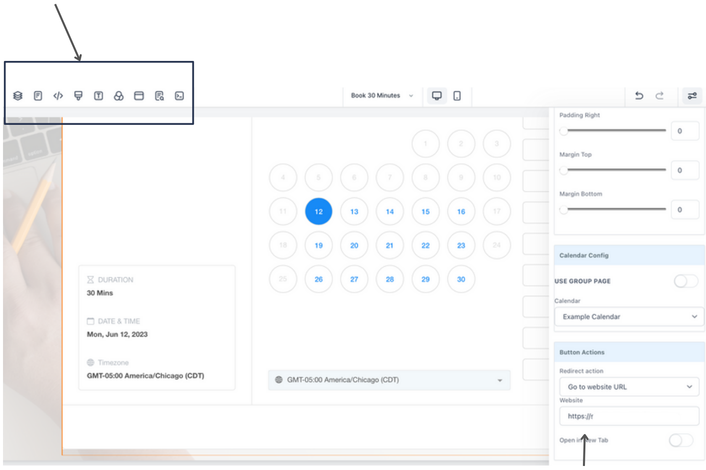
Enter any custom coding to edit or modify this appointment

Enable or disable the ability to reschedule or cancel

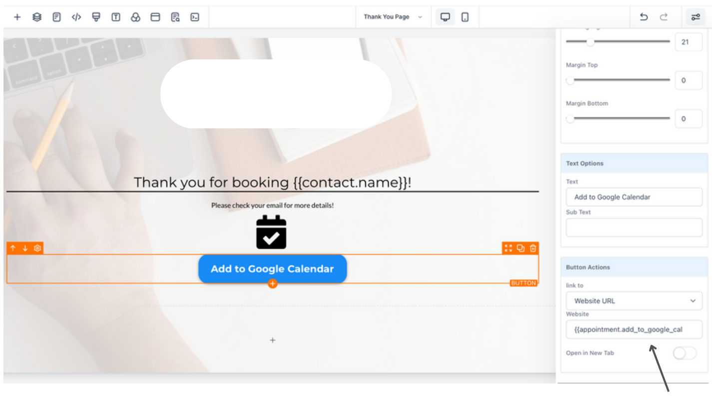
Customize the notes that appear in calendar event on the user & contacts google or outlook calendars

03

CREATE YOUR BOOKING PAGE



link to TY page



{{appointment.add_to_google_calendar}}

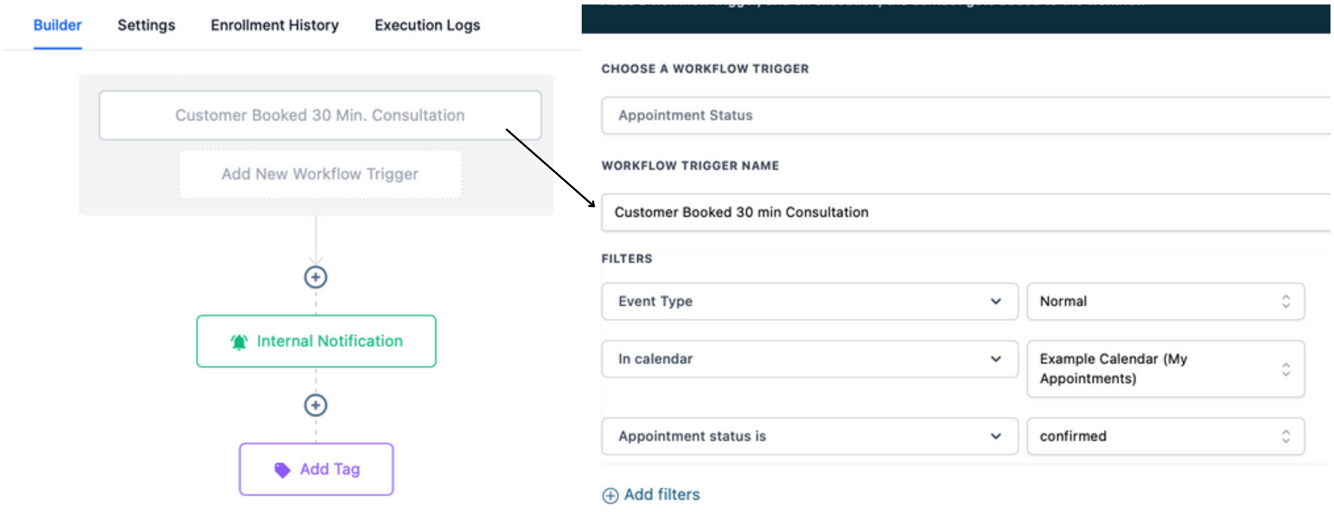
1. Create a funnel with booking page(s) by pulling in the calendar element & choosing your appointment service or toggle for the group calendar to show all services (clone and edit for thank you page)
    - Once you have the first page designed how you like it, you can clone and edit it for the thank 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



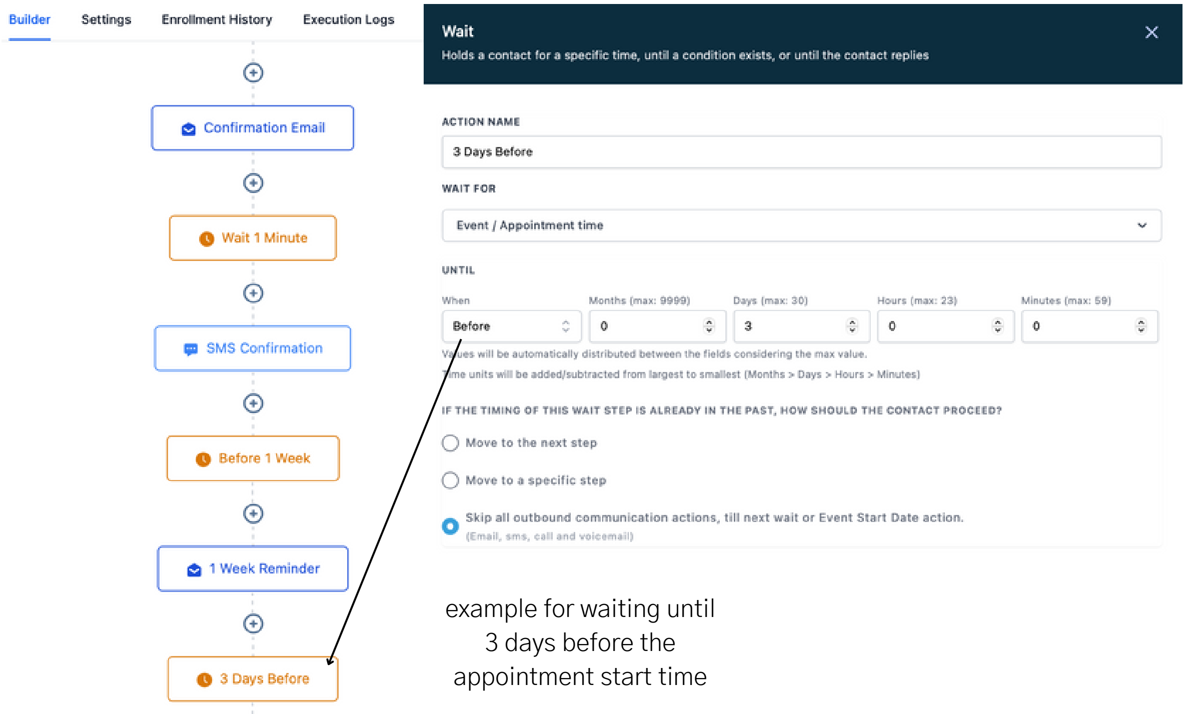
1. Open Automation on the left tab – Click +Create Workflow

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



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**

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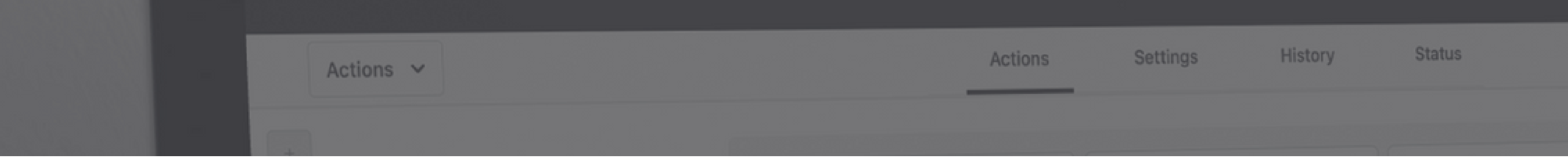
EXAMPLE WORKFLOW

- 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!

WWW.YOURHELPWEBSITE.COM

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