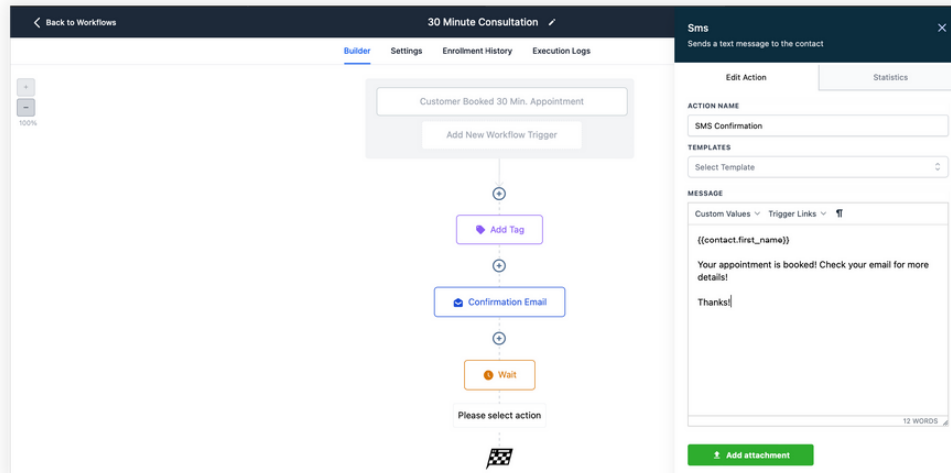


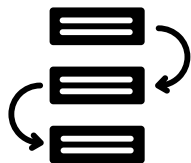
# Your Appointment Automation

Use the workflows tool to automate any actions you want when a customer books an appointment! Send confirmations, reminders, and more.



## Configure Your Workflow Trigger

- Choose Appointment Status to trigger off of any appointment being booked. Suggested for all appointment triggers, runs if manually booked and/or if the customer booked.
- Choose Customer Booked Appointment to trigger off of the contact booking an appointment, will not run on manually booked appointments, ONLY ones the customer booked.
- Add at least 2 filter types, which calendar & status is confirmed in order to only trigger off of confirmed appointments.



## Build Your Custom Flow With Actions

- 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 .
- Wait Steps delay actions from executing until a designated time.
- Choose & customize the "event/appointment time" wait step based on when you want to send reminder messages, follow-up messages, or even internal notification reminders to the user.

# Your Appointment Automation

Use the workflows tool to automate any actions you want when a customer books an appointment! Send confirmations, reminders, and more.

Fill In these fields in order to be fully prepared for this challenge

## A. WORKFLOW NAME

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## B. WORKFLOW TRIGGER

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## C. TRIGGER FILTERS

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## D. CONFIRMATION MESSAGING

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## E. EVENT/APPT WAIT STEPS

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## F. REMINDER MESSAGING

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Custom Field	Populates
{{appointment.title}}	The appointments title (settings – calendars – edit service)
{{appointment.start_time}}	The appointments start date & time
{{appointment.only_start_date}}	The appointments start date only
{{appointment.only_start_time}}	The appointments start time only
{{appointment.end_time}}	The appointments end date & time
{{appointment.only_end_date}}	The appointments end date only
{{appointment.only_end_time}}	The appointments end time only
{{appointment.timezone}}	The appointments timezone
{{appointment.cancellation_link}}	The link to cancel the appointment
{{appointment.reschedule_link}}	The link to reschedule the appointment
{{appointment.meeting_location}}	The link/address to join the meeting (settings – profile)
{{appointment.notes}}	The notes added to the appointment

Custom Field	Populates
{{appointment.add_to_google_calendar}}	The link to add the appointment to a google calendar
{{appointment.add_to_ical_outlook}}	The link to add the appointment to an iCal or Outlook calendar
{{calendar.name}}	The appointment's calendar name
{{appointment.user.name}}	The appointment users full name
{{appointment.user.first_name}}	The appointment users first name only
{{appointment.user.last_name}}	The appointment users last name only
{{appointment.user.email}}	The appointment users email address
{{appointment.user.phone}}	The appointment users phone #
{{appointment.user.email_signature}}	The appointment users email signature (settings – profile)
{{appointment.user.twilio_phone_number}}	The appointment users twilio phone #