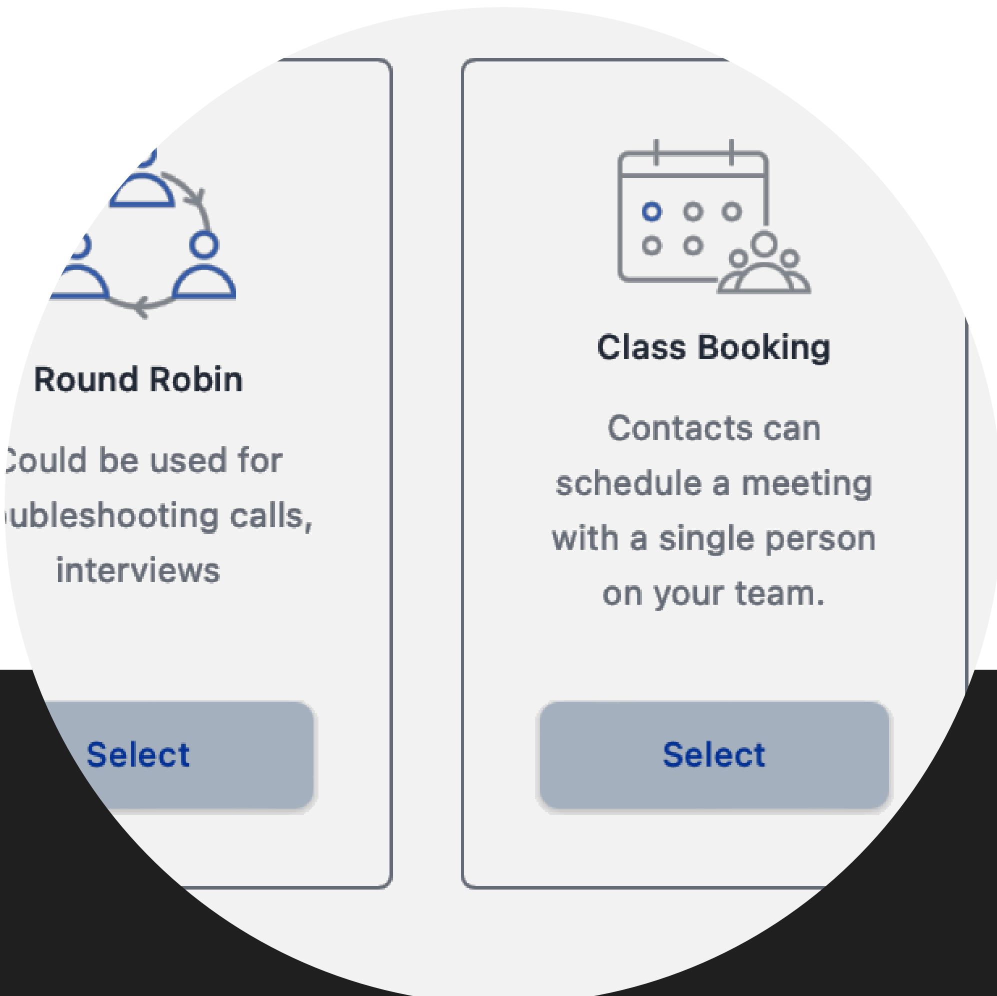
BOOK YOUR APPOINTMENTS



November 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}}

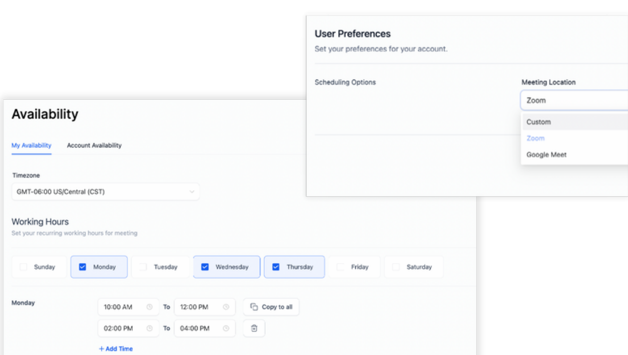
Google In your settings, you can integrate your Google account in order to sync your Google Calendar (or google meet too!) to the system, avoiding double bookings

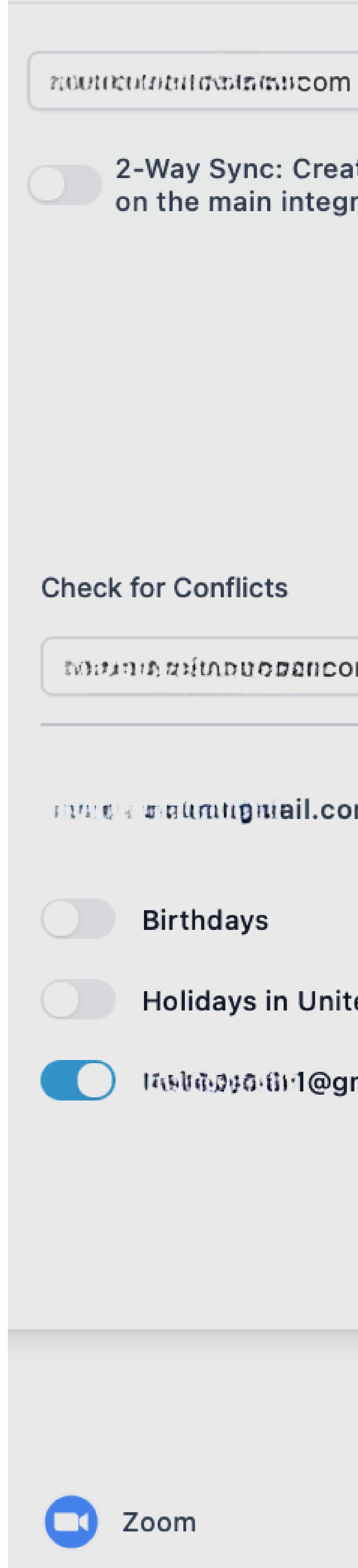
Outlook In your settings, you can integrate your Outlook account in order to sync your Outlook Calendar to the system - avoiding double bookings

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

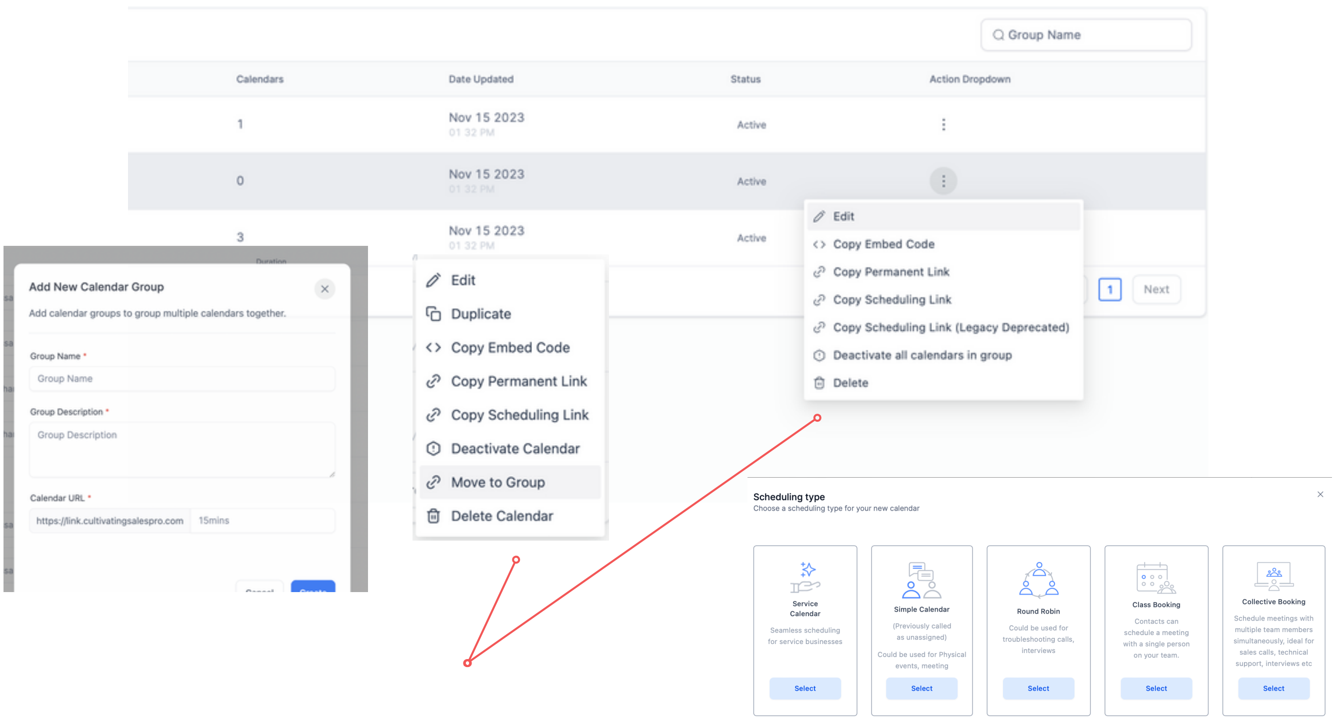
Availability In your settings, you can set your calendar availability for the times you will be available to take meetings





02

CREATE YOUR CALENDAR

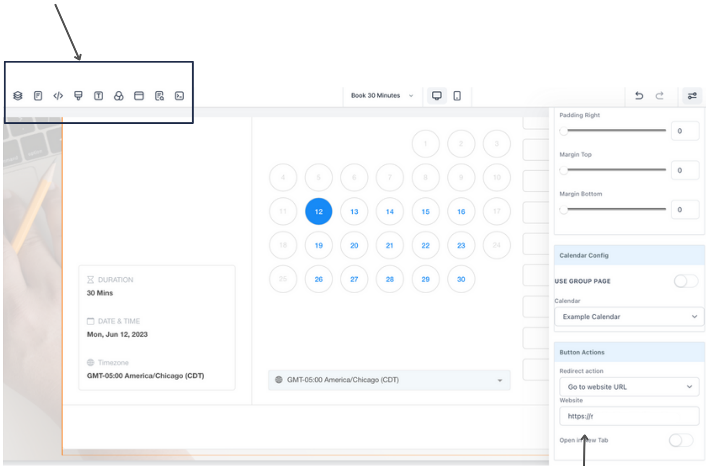


1. Create A Group
   - This is so you can organize your appointments by category, group, user, etc

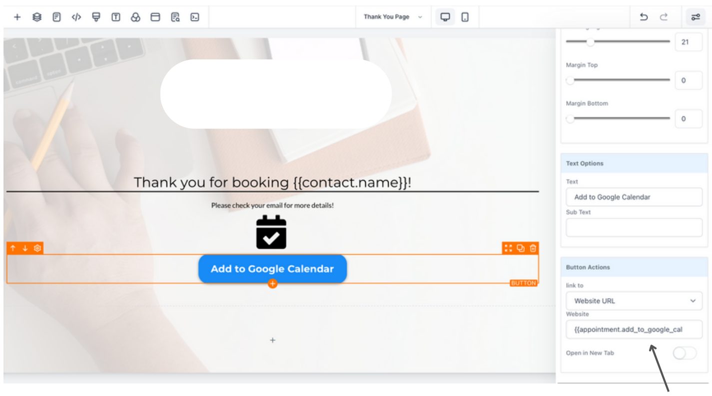
2. Decide What Calendar Type You Need
   - **Round Robin –** This is a normal appointment where you can add the user(s) & a contact can book with one of the users based on availability or priority
   - **Simple Calendar –** Connect to a singular external calendar or sub-calendar with specified filtering 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
   - **Service Calendar –** Create a calendar so users can create different services they offer, group them by categories, & display them in one single scheduling link

03

CREATE YOUR BOOKING PAGE



link to TY page



{{appointment.add_to_google_calendar}}

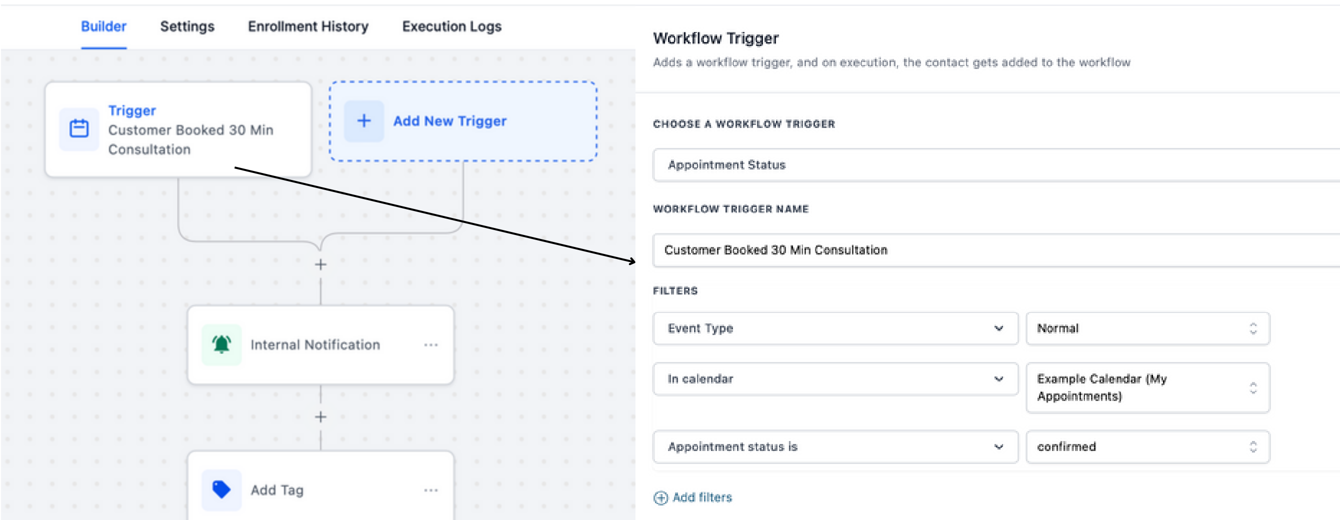
1. Create a funnel with booking page(s) by pulling in the calendar element & choosing your appointment service or toggle for the group calendar to show all services (clone and edit for thank you page)
   - Once you have the first page designed how you like it, you can clone and edit it for the thank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

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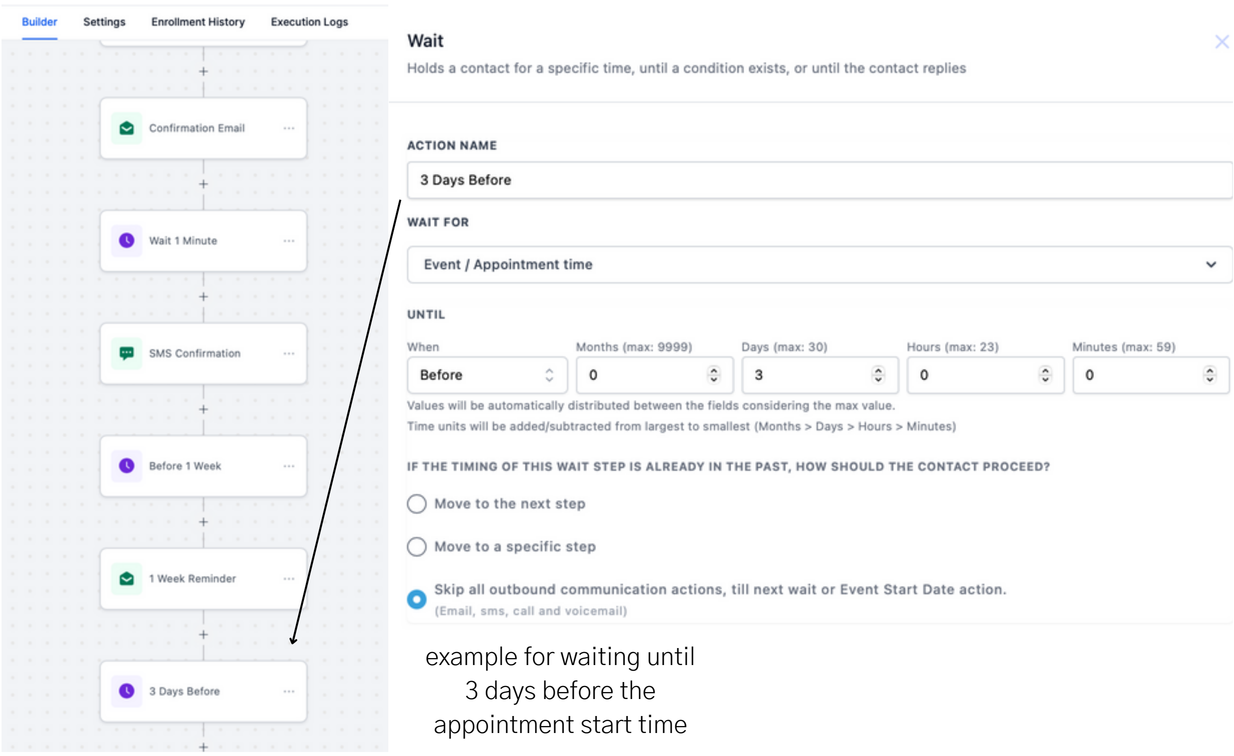
PART 2
CONFIGURE YOUR WORKFLOW ACTIONS



example for waiting until
3 days before the
appointment start time

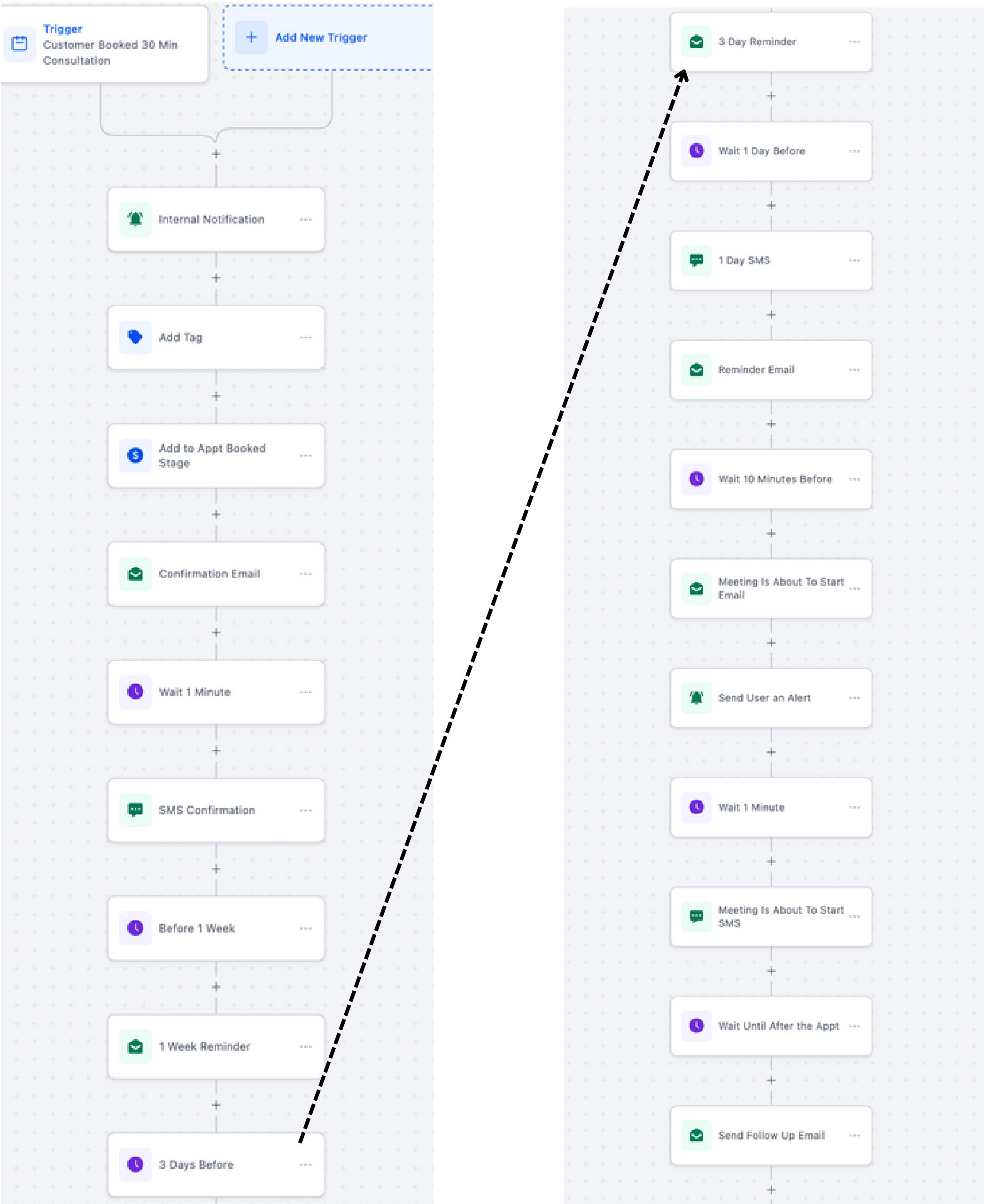
1. After configuring your triggers, start adding actions
    - For example... set event start date, tag them, send confirmation & follow-up emails, SMS, or Voicemail, update or add them to a pipeline, send the user an internal notification, etc.
    - Use custom fields & values to customize messaging

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

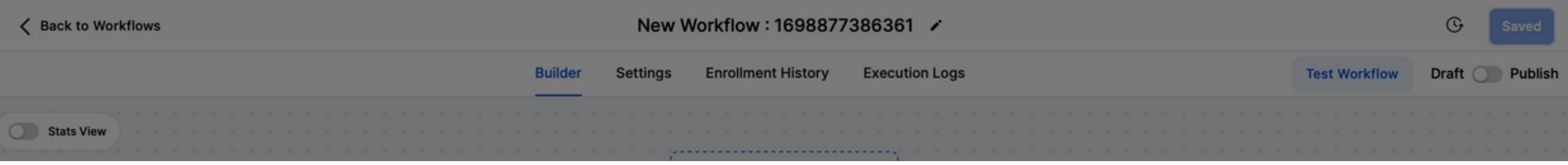
3. Test & Publish Your Workflow To Make It Live

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 WORKFLOWS ONE STEP AT A TIME

Have You Tested It?

To ensure your automation is configured to your liking, go through your process as a client would, using placeholder information. The log tabs, along with contact record data, can help you optimize your setup. Don’t hesitate to permanently delete your contact and try again to get it just right.

Have You Cleared Your Cache?

Updates pushed by your browser, system, or other services can fill up your browser cache. Clearing your cache solely removes data stored on your device from the websites and apps you visit, with no influence on your photos or saved files. A simple search for instructions depending on your browser you use will give you the directions you need.

Do Your Triggers Need Additional Filters?

To give more clarity to your workflow triggers, incorporate suitable filters that outline your requirements for it to execute. Merely having it set to trigger off of ”Form Submitted” is vague and doesn’t provide any specifics about which form is being referred to. Incorporating the ”form is” filter can help alleviate this issue.

Have You Sent A Loom Video To Support?

To expedite finding a solution, take advantage of loom.com as a communication tool when reaching out to the support team. The website provides us with valuable context about the issue, helping us help you more efficiently.

Is Allow Re–Entry On?

The ”Allow Re–entry” toggle in your workflow settings is responsible for allowing a contact to enter your workflow multiple times. Consider if this feature is necessary for your project and if you only need it temporarily for testing purposes.

Have You Looked Through Workflow Logs?

If you’re ever in need of troubleshooting a workflow, there are two tabs you can check out. Firstly, the Execution Logs tab will show you every step executed in chronological order for all contacts. Secondly, you can go to the Enrollment History tab to see each contact in your flow and which step they are currently on, as well as their next scheduled execution. These features are incredibly useful when it comes to tracking the execution of workflows.

Have You Checked Your Audit Logs?

When you access your account settings, take a look at the left side menu and scroll down to “Audit Logs” to view various logs and changes made to contacts, custom fields, values, and more. This feature is incredibly useful when you need to know who made a change, what was changed, and when it was changed.

Have You Tried An Incognito Tab or Other Browser?

If you’re experiencing issues with updates or your cache interfering with the system’s functionality, consider testing it out in an incognito private browser. This allows you to bypass the cache and start fresh. Another option is to use a different browser like Safari to see if the issue persists.

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!

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