VIRTUAL CONSULT
IMPLEMENTATION GUIDE

SECTION ONE: **PRE-REQUISITS**

Sign up for Calendly

Sign up for Zoom

(Optional) Get a payment gateway (ex: Stripe)

(Optional) Create a Zapier account (for automatically adding leads into your CRM

SECTION TWO: **PREPARATION**

Sync Calendly with your calendar/diary/schedule

Integrate Zoom with Calendly

Integrate your payment gateway with Calendly

SECTION THREE: **SETUP**

Please skip to section five if you have the Done-For-You Clinic Marketing System

Set up your name, custom URL and profile picture

Create new event, give it a name & description

Create the questions you need to ask

Add Zoom as the location for your event

Set up your desired availability and event duration

Create custom confirmation & reminder messages

Add a custom Thank-You page to send people to

Add your desired payment options

Create a test appointment for yourself

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SECTION FOUR: **CRM INTEGRATION**

Please skip to section 5 if you have the Done-For-You Clinic Marketing System

Connect Calendly to your desired CRM

Sync contact info, consult date & time and question answers

Assign a lead source to your contacts

(Optional) Add contacts into an email sequence if applicable

Use the test appointment you created to test the automation

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SECTION FIVE: DONE-FOR-YOU

Please follow these instructions if you'd like our team to handle the implementation for you

Send an email to CMS support

Please include "Online Scheduler Request" in the subject line and make sure to include the following:

Login credentials to Calendly

Your appointment types & options

Available times for each appointment type by office

Address and contact details for each office (for in-office consults)

A high quality version of your logo

Consult length

SECTION SIX: **MARKETING**

Integrate it on your website

Promote it to your lead list

Add it to social media

Congratulations! You're done!