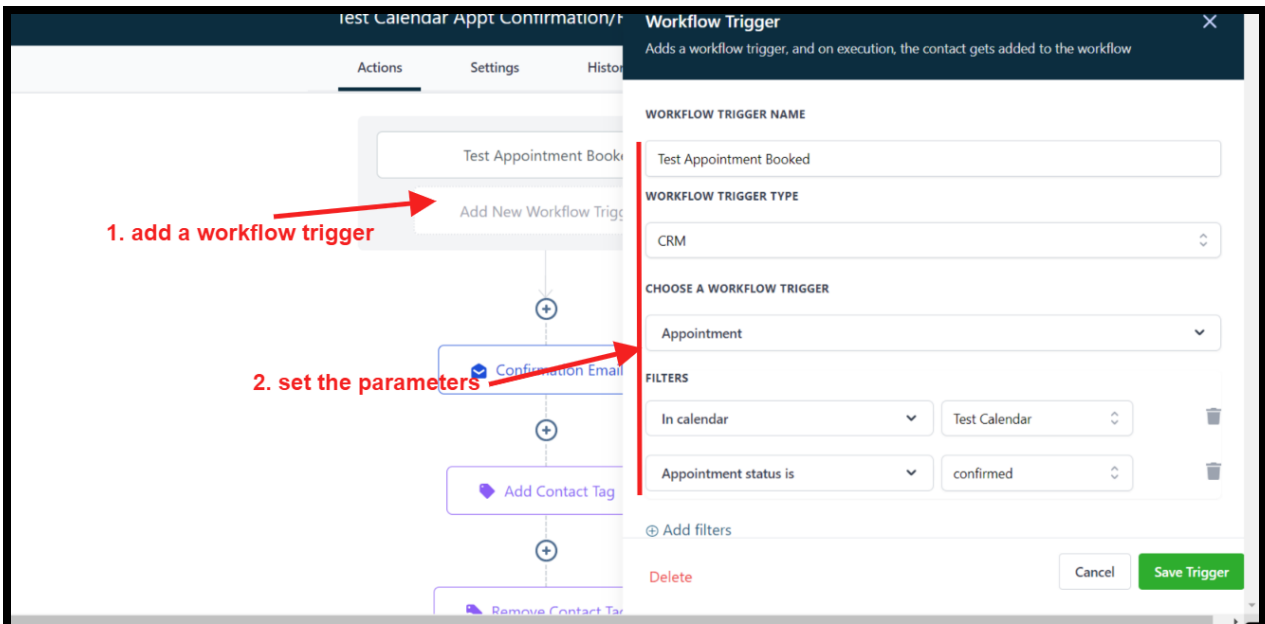


Test Calendar Appt Confirmation/Reminder

1. First step is to add a workflow trigger , you also need to set the following parameters:
 - a. **Workflow Trigger name** - the name of your workflow trigger.
 - b. **Workflow Trigger type** - Set it to CRM.
 - c. **Choose a Workflow trigger** - Set it to Appointment.
 - d. **Filters:**
 - i. **In Calendar** - Set it to your preferred Calendar that you are going to use.
 - ii. **Appointment Status** - Set it to "Confirmed".

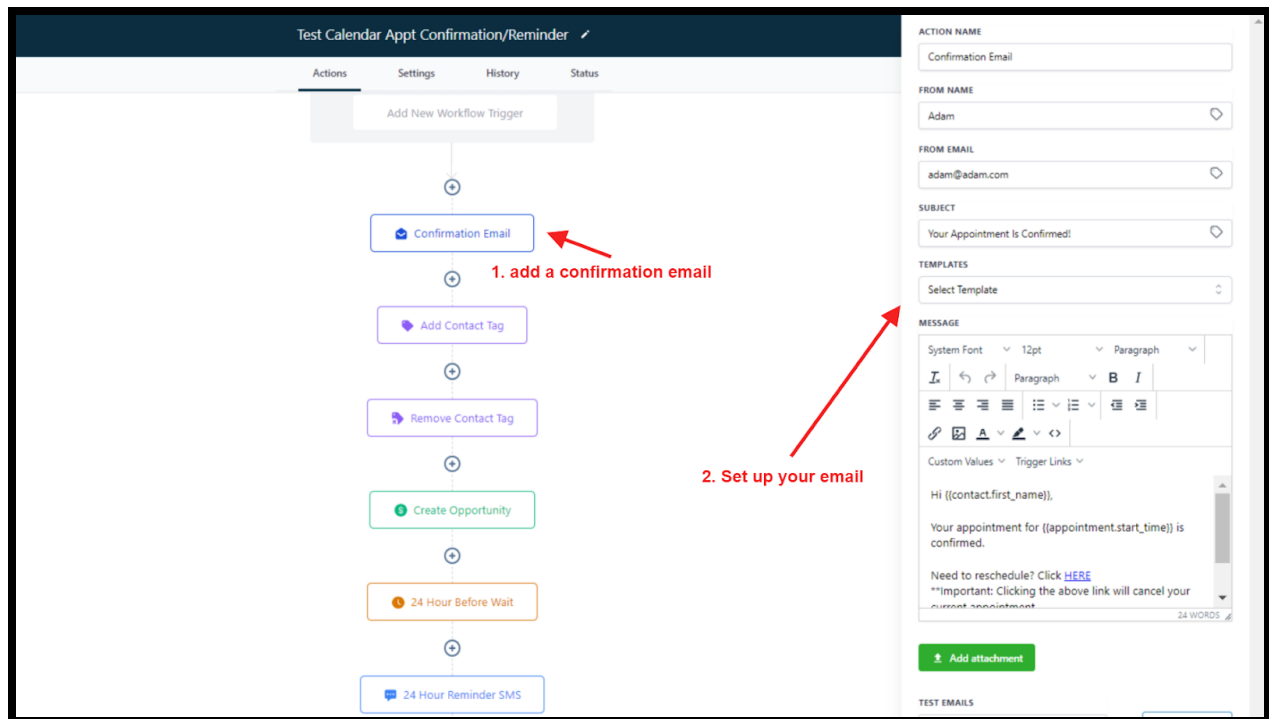
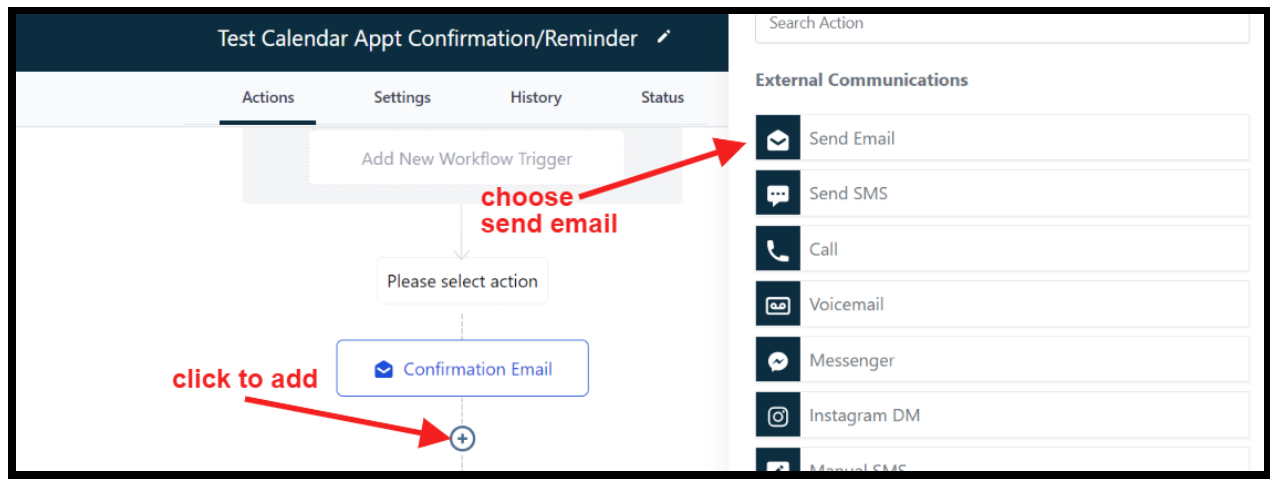


The screenshot displays the 'Workflow Trigger' configuration window. The main workflow is visible on the left, with steps: 'Test Appointment Booked', 'Add New Workflow Trigger', 'Confirmation Email', 'Add Contact Tag', and 'Remove Contact Tag'. A red arrow points to the 'Add New Workflow Trigger' button with the text '1. add a workflow trigger'. Another red arrow points to the filter configuration area with the text '2. set the parameters'. The 'Workflow Trigger' configuration panel on the right includes the following fields:

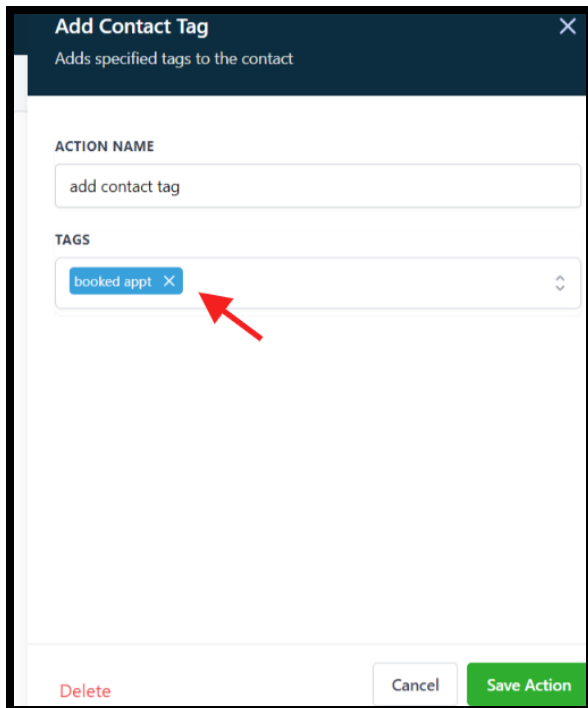
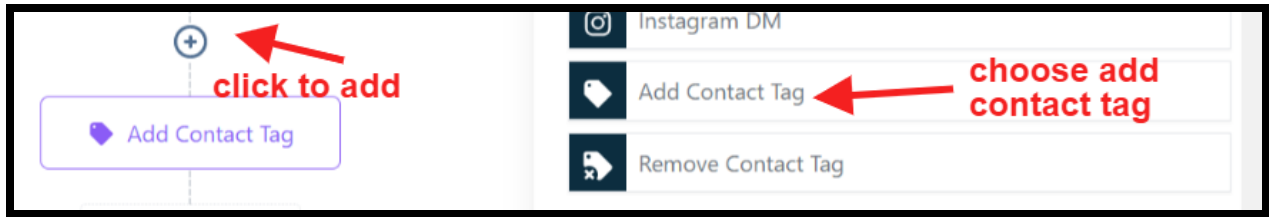
- WORKFLOW TRIGGER NAME:** Test Appointment Booked
- WORKFLOW TRIGGER TYPE:** CRM
- CHOOSE A WORKFLOW TRIGGER:** Appointment
- FILTERS:**
 - In calendar: Test Calendar
 - Appointment status is: confirmed

Buttons for 'Delete', 'Cancel', and 'Save Trigger' are located at the bottom right of the configuration panel.

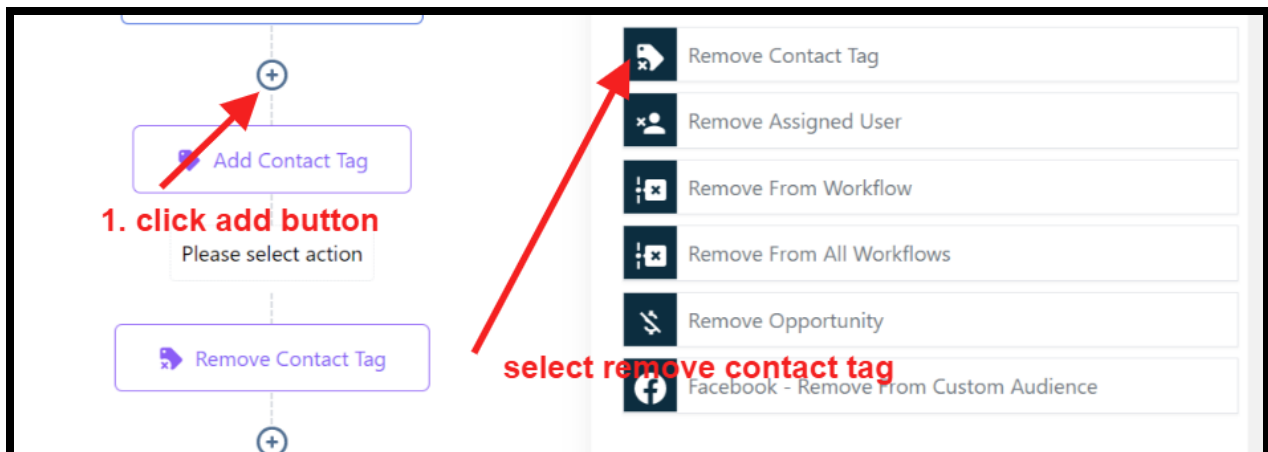
2. You need to set up your email confirmation by clicking on the add button and then choose " send email" , after that you need to set up your email.



3. Add a contact tag , first click the add button and choose the “Add Contact tag Option”. Type in your contact tag : “booked appt” and then hit the save button.



4. Next is add a remove contact tag action. Click the add button and select “Remove Contact Tag”. Type in the tag that you want to be removed and then click save.



ACTION NAME

TAGS

reschedule ×

Delete Cancel Save Action

- Next action is to "create opportunity". Click the add button and then choose "Add/Update Opportunity".

Actions

- Add/Update Opportunity
- Remove Opportunity

choose add/update opportunity

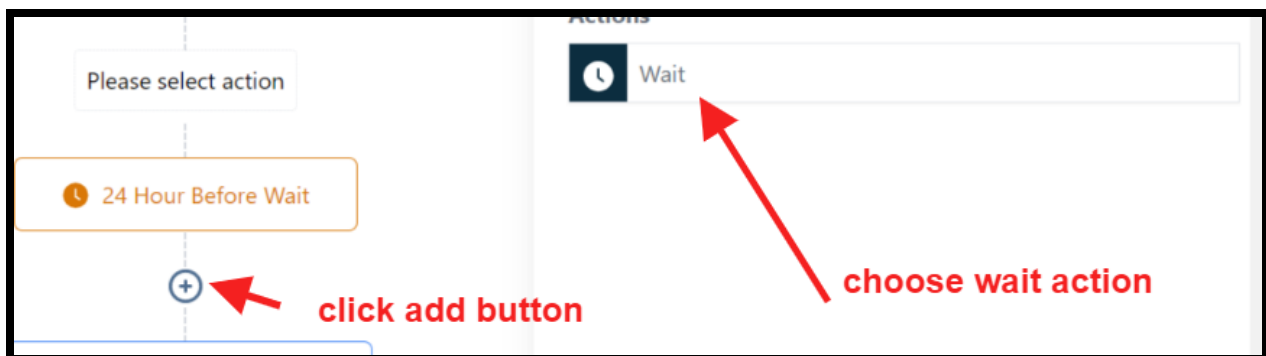
- Set the In Pipeline field to "Optin to Client", Pipeline Stage to Booked Appointment and then click save button.

The screenshot shows a form titled "ACTION NAME" with the following fields and annotations:

- ACTION NAME:** Create Opportunity
- IN PIPELINE:** OPTIN TO CLIENT PIPELINE (Annotated with a red arrow and "IN PIPELINE")
- IN PIPELINE STAGE:** BOOKED APPOINTMENT (Annotated with a red arrow and "IN PIPELINE STAGE")
- OPPORTUNITY NAME:** (Empty field)
- OPPORTUNITY SOURCE:** (Empty field) (Annotated with a red arrow and "save action if finish")
- LEAD VALUE:** (Empty field)

At the bottom of the form, there are three buttons: "Delete" (red text), "Cancel" (white text on a grey button), and "Save Action" (white text on a green button). A red arrow points from the "save action if finish" annotation to the "Save Action" button.

- Add a wait action, click the button and then choose the wait action.



Set the Following Field on the 24 Hour Before Wait action

- **Action Name** - 24 Hour Before Wait
- **Wait For** - Event/Appointment Time
- **Until** - Before 24 hours
- **IF THE TIMING OF THIS WAIT STEP IS ALREADY IN THE PAST, HOW SHOULD THE CONTACT PROCEED?** - Skip all outbound communication actions, till the next wait or Event Start Date action.

Hit the Save button once done.

Hold a contact for a specific time, until a condition exists, or until the contact replies

ACTION NAME
24 Hour Before Wait ← 1. set the name

WAIT FOR
Event / Appointment time ← 2. set the wait for field

UNTIL ← 3. set the until field
Before 24 hours

IF THE TIMING OF THIS WAIT STEP IS ALREADY IN THE PAST, HOW SHOULD THE CONTACT PROCEED?
set it to
 Move to next step
 Skip all outbound communication actions, till next wait or Event Start Date action.
(Email, sms, call and voicemail)

hit the save button once done

Delete Cancel Save Action

8. Add Text Reminder by Clicking the add button and then choose "Send SMS".

Please select action

24 Hour Reminder SMS

+ ← 1. click add button

Send Email
Send SMS ← 2. Choose send SMS
Call
Voicemail

Set the Following Fields for the Text Reminder:

- **Action Name** - 24 Hour Reminder SMS
- **Message** - Type in your Message

Click the save button once done.

Sends a text message to the contact

Edit Action Statistics

ACTION NAME

24 Hour Reminder SMS

TEMPLATES

Select Template

MESSAGE

Custom Values Trigger links

Call tomorrow!

Delete Cancel Save Action

1. set your action name

2. type in your message

click save action once done

9. Add another wait action (**Before 1hr Reminder**).

Set the Following Field on the 1 Hour Before Wait action

- **Action Name** - 24 Hour Before Wait
- **Wait For** - Event/Appointment Time
- **Until** - Before 1 hour
- **IF THE TIMING OF THIS WAIT STEP IS ALREADY IN THE PAST, HOW SHOULD THE CONTACT PROCEED?** - Skip all outbound communication actions, till the next wait or Event Start Date action.

Hit the Save button once done.

10. Add another SMS action (**Before 1hr SMS Reminder**). Type in your Message and then hit the save button once finished.

The screenshot displays a workflow editor interface. On the left, a vertical sequence of actions is shown: a plus sign, a '24 Hour Reminder SMS' action, a 'Wait' action, an 'SMS' action, another plus sign, and a checkered flag icon. A red arrow points to the 'SMS' action with the text 'add another SMS action'. On the right, the configuration panel for the 'SMS' action is visible. It has a title 'Sends a text message to the contact' and tabs for 'Edit Action' and 'Statistics'. The 'Edit Action' tab is active, showing fields for 'ACTION NAME' (SMS), 'TEMPLATES' (Select Template), and 'MESSAGE' (See you in 1 hour!). A red arrow points to the message field with the text 'Type in your message'. At the bottom of the configuration panel, there are buttons for 'Delete', 'Cancel', and 'Save Action'. A red arrow points to the 'Save Action' button with the text 'Hit save once finish'.