

Creating or Booking an Appointment in GHL

Step 1: Navigate to the Leads Profile

- 1.1. Log in to your GHL account.
- 1.2. Locate the Leads profile for the appointment.
- 1.3. Click on the "Appointment" tab within the Leads profile.
- 1.4. Select the "Add" button to initiate the appointment creation process.

Step 2: Book Appointment Window

- 2.1. After clicking "Add," a pop-up window, titled "Book Appointment," will appear.

Step 3: Set Appointment Details

3.1. Calendar: - Choose "Smart Home CALL CENTER ROUND ROBIN ALL" from the Calendar dropdown.

3.2. Team Member: - Select "Sam Stratford" from the Team Member dropdown.

3.3. Add Description: - If necessary, provide additional notes about the appointment by selecting "Add

Description."

3.4. Date and Time: - Choose the desired date and time for the appointment.

3.5. Timezone: - Select the timezone based on the lead's location (e.g., PST or PDT for Las Vegas and

Henderson).

3.6. Update Contact Timezone: - Ensure the box that states "Also update contact Timezone" is selected.

3.7. Default: - Confirm that the "Default" option is selected.

3.8. Available Date and Time: - Offer or provide date and time options based on availability.

Step 4: Save Appointment

4.1. Review all details to ensure accuracy.

4.2. Make sure the status is set to "Unconfirmed"

4.3. Click "Book Appointment" to confirm and save the scheduled appointment.

Post-Appointment Steps:

4.4. An automated SMS will be sent to the lead confirming the appointment.

4.5. Verify that the appointment appears on the calendar at the correct date and time.

Congratulations! You have successfully booked an appointment in GHL. Your paragraph text

2 of 5405 selected | Owner (Assign To) | Followers

Book Appointment

Calendar

1 Smart Home CALL CENTER ROUND ROBIN ALL

Appointment Title

(eg) Appointment with Bob

Add Description

Team Member

2 Sam Stratford 1

Date & Time

Showing slots in this timezone:
3 GMT-08:00 America/Los_Angeles (PST)

Default Custom

4 Date Slot
Mon, Feb 16th, 2026 1:00 pm - 1:30 pm

Meeting Location

5 Status : Unconfirmed

6

Attendees 1

Contact

Ericka L Prasad
Feb 16, 1:00 pm - 1:30 pm
Contact's Local Time
(America/Los_Angeles) (i) (e) (X)

Internal Notes + Add Internal Note

Cancel Book Appointment