

## **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**

## Book Appointment



### Calendar

Smart Home CALL CENTER ROUND ROBIN ALL

### Appointment Title

(eg) Appointment with Bob

[Add Description](#)

### Team Member

Sam Stratford 1

### Date & Time

Showing slots in this timezone:

GMT-08:00 America/Los\_Angeles (PST)

Default

Custom

Date

Mon, Feb 16th, 2026

Slot

1:00 pm - 1:30 pm

### Meeting Location

Status :

Unconfirmed

Cancel

Book Appointment