LEAD TOOLBOX
Scheduling and Appointments:

Step 1: Log In to Lead Toolbox

- Go to the Lead Toolbox login page.
- Enter your credentials (username and password) and click Login.

Step 2: Navigate to the Scheduling Section

- In the left sidebar, click on Calendar under the Appointments section. This is where you'll set up and manage appointments.
- **Overview of Scheduling:**
  - The Calendar section allows you to view scheduled appointments, manage availability, and set up appointment booking links.
  - You can also sync your calendar with Google Calendar or other third-party services.

Step 3: Set Up Your Calendars

Before clients can book appointments, you need to define the different appointment types you offer.

- Go to Calendar Settings:
  - Click on Calendar Settings at the top of the screen. This will show you a list of all available Calendars.
- Create a New Calendar:
  - Click on Create New Calendar to set up a new appointment type.
- Set Appointment Details:
  - Name the Calendar: Give the Calendar a name that describes the type of meeting (e.g., "Consultation Call," "Discovery Session," "Demo Call").
  - Duration: Choose the duration of the appointment (e.g., 30 minutes, 1 hour).
  - Location: Specify the location for the appointment (e.g., Zoom meeting link, phone call, or in-person meeting address). If using a video conferencing tool like Zoom, you can integrate it directly with Lead Toolbox.
  - Buffer Time: Set buffer time before or after the appointment to prevent back-to-back meetings (e.g., 10 minutes before and after).
- Set Availability:
  - Choose the days and times when this type of appointment can be booked. You can customize the availability for each appointment type.
  - Example: If you offer consultations only on weekdays from 9 AM to 4 PM, set this as your availability.
- Set Reminders:
  - You can choose to send reminder notifications to clients before the appointment. This can be in the form of an email or SMS reminder sent 24 hours or 1 hour before the meeting.
- Click Save:
  - Once all details are filled out, click Save to create the appointment type.

Step 4: Create and Share Appointment Booking Links

- Create a Booking Link:
  - Go to the Calnedar Settings section and select the 3 dots under Action Dropdown. Here, you'll be able to generate unique links for each appointment type that your clients can use to book time with you under the Share toggle.
- Customize the Booking Link:
  - Choose the appointment type you created earlier.
  - Lead Toolbox will automatically generate a link that you can share with clients. The link will allow clients to see your available times and book an appointment.
- Share the Link:
  - You can share this link on your website, social media, in email campaigns, or directly with your leads and clients.
  - You can also embed the booking link as a widget on your website for easy access.
- Set Up Custom Branding (Optional):
  - Customise the booking page with your branding (e.g., logo, colors) to maintain a consistent brand experience for clients.

Step 5: Sync Your Calendar

To avoid double bookings and ensure seamless scheduling, Lead Toolbox allows you to sync your appointment calendar with external calendars like Google Calendar.

- Go to Calendar Settings:
  - In the Calendar section, click on the settings (gear icon) at the top-right corner.
- Sync with Google Calendar:
  - Select the option to sync your Google Calendar with Lead Toolbox. This allows Lead Toolbox to check your availability and avoid scheduling conflicts.
  - Follow the prompts to sign in to your Google account and grant access to your calendar.
- Adjust Sync Settings:
  - You can set preferences such as syncing availability (what shows as available in Lead Toolbox), syncing appointments to your Google Calendar, or blocking out time on your Google Calendar.
- Save Changes:
  - After configuring your settings, click Save to finish the sync.

Step 6: Set Up Appointment Notifications

It's crucial to keep both your team and clients informed about upcoming appointments.

- Set Appointment Reminders:
  - In the Appointment Types settings, you can enable reminders for both yourself and your clients.
  - You can choose when to send reminders, such as:
    - Email Reminders: Sent 1 day or 1 hour before the appointment.
    - SMS Reminders: Sent 1 day or 1 hour before the appointment.
- Set Confirmation Emails:
  - When a client books an appointment, you can set up an automatic confirmation email that includes the appointment details.
- Customise the Content:
  - In the reminder and confirmation emails, you can customise the content to include specific instructions, rescheduling information, or links to the meeting location (e.g., Zoom link or phone number).
- Save Notifications:
  - Once you've customized the notifications, click Save.

Step 7: View and Manage Appointments

- Access the Calendar:
  - In the Calendar section, you can see a visual representation of all scheduled appointments.
  - Appointments will appear as colored blocks on the calendar with the client's name, appointment type, and time.
- Reschedule or Cancel Appointments:
  - If you need to reschedule or cancel an appointment, simply click on the appointment and select Reschedule or Cancel.
  - You can also add notes to the appointment for future reference.
- Manage Upcoming Appointments:
  - You can view upcoming appointments, check availability, and make changes as needed.
  - If your team members are using Lead Toolbox, they can also access and manage appointments directly from the calendar.

Step 8: Automate Appointment Scheduling with Workflows

Lead Toolbox allows you to automate parts of the appointment scheduling process through Workflows.

- Create an Appointment Workflow:
  - Navigate to Automation > Workflows.
  - Create a new workflow and add triggers such as Form Submitted or Tag Added. This could be for when a lead submits a form requesting an appointment or shows interest in a specific service.
- Add Appointment Action:
  - You can add a workflow action that automatically sends an appointment booking link or triggers an appointment booking email.
  - You can also send reminders and confirmations through workflows to ensure clients never miss an appointment.
- Follow-Up Reminders:
  - You can create follow-up reminders in the workflow to ensure clients show up for their appointments or reschedule if necessary.

Step 9: Customise Pipelines for Different Use Cases

- Monitor Appointment Metrics:
  - Lead Toolbox provides reports to track the performance of your appointment scheduling system. You can view how many appointments have been booked, the conversion rates, and overall activity.
- Analyse Appointment Data:
  - Use the Reports section to view trends, such as:
    - The number of appointments booked over time.
    - The types of appointments most frequently scheduled.
    - The no-show or cancellation rates.
- Adjust Appointment Strategy:
  - Based on the data, you can make adjustments to your scheduling process, such as tweaking your availability or sending more reminders to reduce no-shows.

Step 10: Integration with Third-Party Tools (Optional)

- Zoom Integration:
  - You can integrate Zoom with Lead Toolbox to automatically create Zoom meeting links when a client schedules an appointment.
- Payment Integration:
  - If you charge for consultations or services, you can integrate Lead Toolbox with payment processors like Stripe or PayPal to accept payments at the time of booking.
- CRM Integration:
  - Integrate your calendar with Lead Toolbox to automatically track client interactions, appointment history, and follow-up tasks related to appointments.