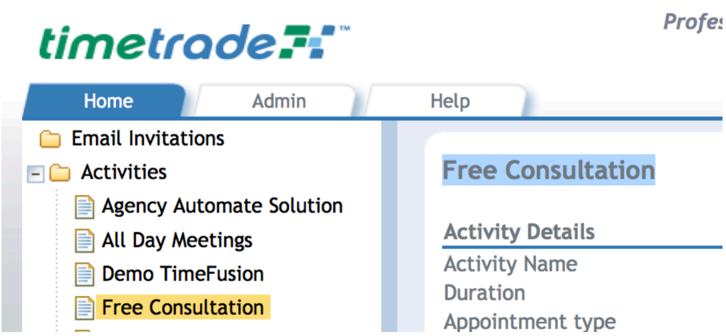
Follow these steps to integrate an Appointment from TimeTrade (or Full Slate) into Infusionsoft using TimeFusion Unlimited.

1. Open 3 browser tabs:
    a. Infusionsoft Admin->Settings and “Setup Custom Fields for Contact”
    b. Infusionsoft campaign you will be modifying/creating
    c. Your TimeTrade account (or Full Slate account)

2. Find the TimeTrade Activity you want to integrate into Infusionsoft and copy the Activity Name to the clipboard:

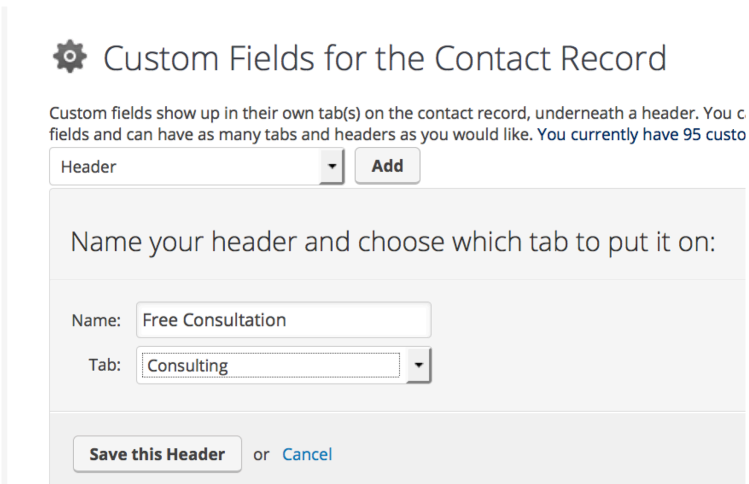
    EXAMPLE

    Example – copying “Free Consultation” to my clipboard

3. On your Infusionsoft Custom Field setup page, add a “Header” and paste the TimeTrade Activity from your clipboard into the Name for the Header, then choose a tab to place the Header under, then save it:

    EXAMPLE

    Example – pasted “Free Consultation” into Header name and chose the “Consulting” tab

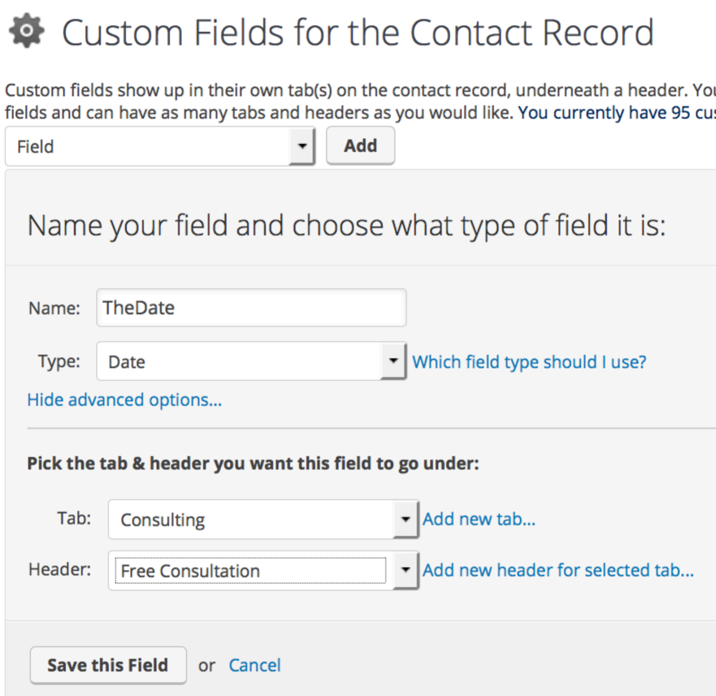
4. Setup fields for TimeFusion to store the details for the appointment…
    <u>For the **Date**</u>: On your Infusionsoft Custom Field setup page, add a “Field” of type “Date” and provide a name that includes that word “Date” in it, and place it under the Header you created for this Activity.

For the **Time**: Add a “Field” of type “Text” and provide a name that includes the word “Time” in it, and place it under the Header you created for this Activity.

For the **Appointment ID**: Add a “Field” of type “Text” and provide a name that includes the word “ApptId” in it, and place it under the Header you created for this Activity.

For the **Response** to a question posed during TimeTrade booking: Add a “Field” of type “Text” and provide a name that includes the word “Response” in it, and place it under the Header you created for this Activity.

EXAMPLE



Example – provided a field with the word “Date” in the name and made it of type “Date” field and placed it under the “Free Consultation Header”. Follow a similar approach for Time (Text field), ApptId (Text field) and Response (Text field).

All of the above custom fields are optional – setup only those you will need.

5. Setup Campaign Builder Goals to be triggered by TimeFusion when an appointment for this TimeTrade Activity is booked, rescheduled or cancelled…
   For a New Appointment: In Campaign Builder create a new Goal and set it to be of type “API Call Is Made”.
   Set the “Integration” field: Open the Goal and set the “Integration” field to “Confirm”. **All capitalization is critical.**
   Set the “Call Name” field: Paste the TimeTrade Activity Name from your clipboard into the Call Name field. Then immediately edit the Call Name field as follows:
   a. Remove all spaces
   b. Remove all punctuation characters

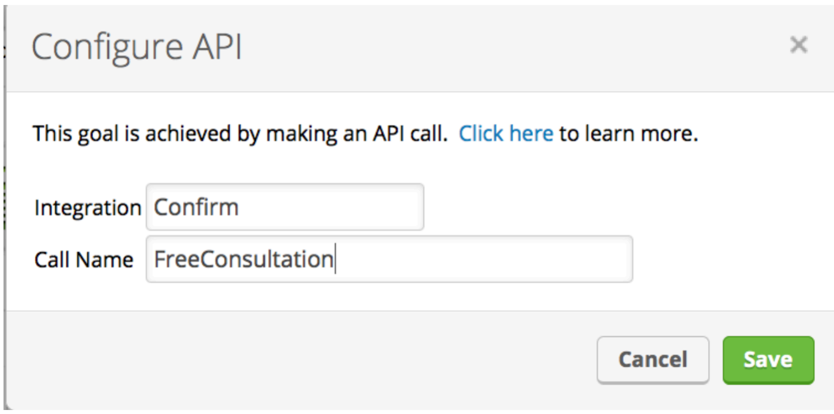
c. Remove all other characters that are not letters or numbers
d. Leave all letters and numbers alone

Now save the Goal.

<u>For a Rescheduled Appointment</u>: Follow the same steps as for the New Appointment Goal, except the “Integration” field is set to “Reschedule”. **All capitalization is critical.**

<u>For a Cancelled Appointment</u>: Follow the same steps as for the New Appointment Goal, except the “Integration” field is set to “Cancel”. **All capitalization is critical.**

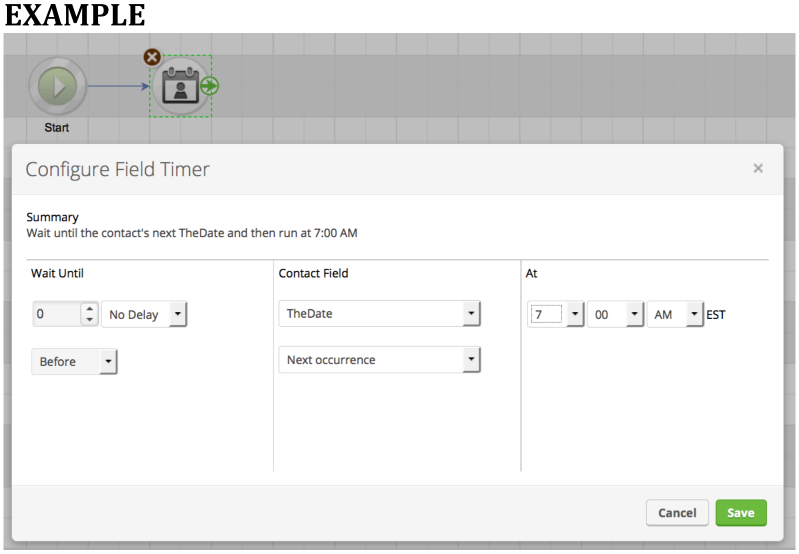
EXAMPLE



Example – setting up an API Goal to be triggered when a new appointment is booked for the “Free Consultation” TimeTrade Activity. Notice the blank space was removed from the Call Name field.

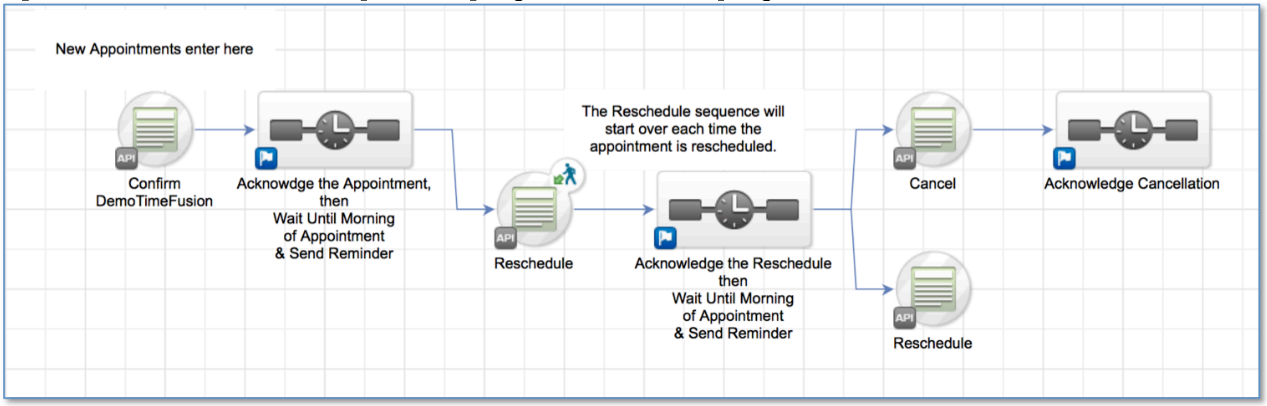
6. If desired, set a Campaign Builder Field timer, for example to trigger an email reminder to be sent on the morning of the appointment…
   In a Campaign Builder sequence create a “Field Timer”, configure the “Wait Until” to a value of “No Delay” and configure the “Contact Field” to the name of the Date custom field you created for this TimeTrade Activity, and set it for “Next Occurrence”.

EXAMPLE



Example – Setting up a Field Timer in a Campaign Builder Sequence that will proceed on the morning of the appointment.

7. Optional - Here is an example Campaign Builder campaign, for reference:



The sequence following the "Reschedule" API Goal should hold timers and emails that are similar to the sequence following the "Confirm" API Goal.

8. Optional - For **GoToMeeting** Integration, add at least one of these additional custom fields under the custom field header you created above:

<u>For the Meeting Link</u>: Add a Field of type Text and include the word "GoToMtgURL" in the name

<u>For the Meeting ID</u>: Add a Field of type Text and include the word "GoToMtgID" in the name

<u>For the Meeting Dial in Number</u>: Add a Field of type Text and include the word "GoToMtgCall" in the name

These fields can be merged into an email that is sent to your meeting attendee after the meeting is booked or rescheduled.