

## **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. Locate CC assigned user field on the left hand side and select your name from the drop down.**
- 1.4. Select the type of appointment from the left hand side by clicking on “New” or “Update” from the Smart Home Appointment Type option.**
- 1.5. Click on the green save button.**
- 1.6. Click on the "Appointment" tab within the Leads profile.**
- 1.7. 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

The screenshot shows the contact profile for Daniel Edwards in the GHL interface. The profile is under the 'Smart Lists' tab. The contact information includes:

- Last Name:** Edwards
- Email:** daniel.webxsolution3@gmail.com (Verified)
- Phone:** +91 84544 79454
- Bill Link:** Bill link
- CC Assigned Users:** 1 user assigned (Marcell)
- Bill Time Stamp For Callers:** Bill time stamp for callers
- Confirmed To Rebook:** No
- Manual Confirmation:** No
- Smart Home Appointment Type:** Update (selected)
- Internet Speed Test:** (empty field)

At the bottom of the form, there is a notification that says "1 Changes made". To the right of this notification are "Cancel" and "Save" buttons. The "Save" button is highlighted in green. There are also some icons on the right side of the form, including "SMS", "From:", and "Type".

## 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



Attendees

1



Contact



Ericka L Prasad

Feb 16, 1:00 pm - 1:30 pm  
Contact's Local Time  
(America/Los\_Angeles)



### Internal Notes

+ Add Internal Note