## Process for Booking Live Event:

To book onto Live events Face2Face you will add tags manually.

Firstly find the account on Infusionsoft by using either the customers name, email or phone no from the lead sheet you are using:

≡ keap		Q  Find a contact
Basic Training Initial Setup Dashboard	My Day	

This will take you to the clients account, if there is more than one check the notes to see which one is active or has money on the account.

Lauren Gibbons	ech results)								
General Address AddressTells	Person Notes SEGMENTATION	Calor Felds	DO NOT CHANGE DETAILS	Samuel	Antomative of	CA Core	atation 14	604	Potest
General Information					Account	Summary			Show in
First Name	Lauren				Anti Paul Bai Due	60.00			
Last Northe	Göborn								
Company					Score				
Company	Choose a company				Load Score	- 6666	6 e -		
	Go Search. Clear								
.500 Title					Phone / I	Pan .			
Person Type	Please select a person type -+				Phone	1 Work	- 0	1730482968	
Lead fource	oga Anarowska 005po	40				Manage P	kone Statu	a	
Owner	alla autorico in a				Phone	2 Min			
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Billing Address					Email / S	ocial			
Street Address 1									
Street Address 2					1.14	finder 100	(and a set of the set	Manager Date	-
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-									18

Before you call, check whether the client is contactable in the notes, hasn't already been booked by marketing or another team member. If this is the case move onto the next lead.

If the client would like to book onto the F2F event you will then need to go to the manage tag section on the account and we will then need to add three tags:

- Your booking tag
- BOOKING Mastertag
- Master tag

[zuzi] buukings incentive rays.	Flease select a lay	•)[	Арріу шіз таў
[2021] Bookings Team:	Please select a tag	ease select a tag	
[2021] BOOKING MasterTag:	Please select a tag	~	Apply this Tag
[2021] Complimentary Courses:	Please select a tag	•	Apply this Tag

After all tags have been applied it should look like this (example MSOPI)

Applied	Tag
19/5/2021 2:46 PM	BOOKINGS ~ MSOPI Master Lead Tag 2021
19/5/2021 2:46 PM	Lauren ~ MSOPI F2F
19/5/2021 2:46 PM	MSOPI ~ [21 May 21 ~ 23 May 21]

Then you need to leave a note to complete the booking: This is found under the general tab, scroll down and to the right and you will see this:

	Vew All Note Template Add Note
Description	$\bigcirc$
Opt out of text marketing Removed - GDPR [No:Notes]	

Click add note

In the Title you would input "MSOPI Live 21-23 May F2F Booked"

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	https://progpr	operty.infusionsoft.com/ContactAction/manageContactAction_legacy.jsp?vie
	Note Summ	ary
	Contact Name	Lauren Gibbons
	Created By Created	Lauren Gibbons Wednesday, May 19, 2021 1:49 PM
	Details	ser
	Template	Please select one
	Туре	Please select one
	Title*	MSOPI Live 21-23 May F2
Ł	Description	
		ŀ
	Notifications	5
	Notify	Please select
		Send as a blind carbon copy
		Delete Cancel Save

Save the note and this is now complete.

Should the client not answer or not wish to attend please leave a relevant note documenting this on the account.