Process for Booking Live Event:
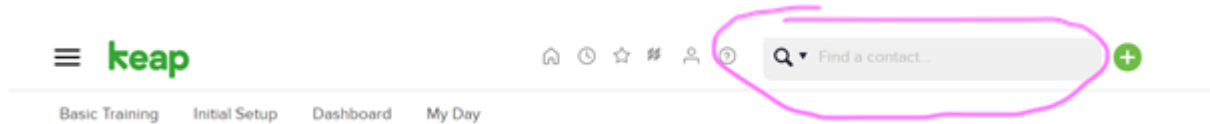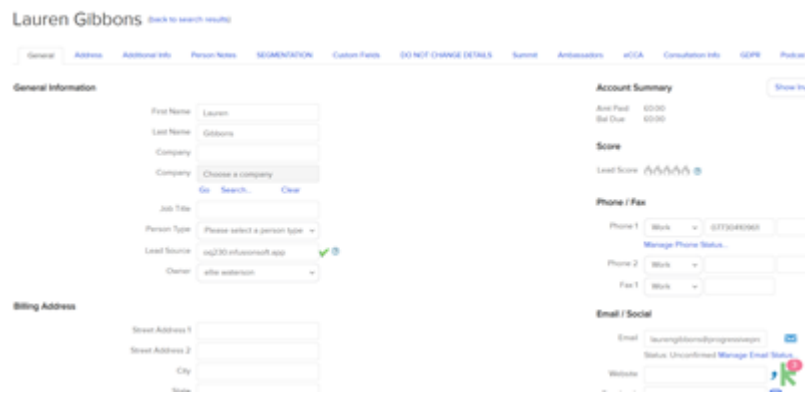
To book onto Live events Face2Face you will add tags manually.

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

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.

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

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:

Click add note

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

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.