# Create A Legacy Appointment Template

**Legacy Notice:** This article refers to a legacy feature that is not compatible with the Campaign Builder.

You can automatically assign appointments to Infusionsoft users to incorporate personal touches into your follow-up strategy. When an appointment template is created through a legacy follow-up sequence or action set, the system will create a new appointment on the assigned user's calendar and in the appointment widget on their home page dashboard.

1. Go to **Marketing > Templates**

2. Select **Appointment** as the template type.

3. Enter a Title for the appointment template. Note: The title is used to identify an appointment template in various lists throughout the system. It should be short and descriptive.

4. Choose a privacy option.

    - Public: Choose this to make the template accessible to other Infusionsoft users.
    - Private: Choose this if you want to hide this template from other Infusionsoft users.

5. Enter the Appointment Information.

    - **Type**: Select a appointment type from the drop-down
    - **Title**: Enter the appointment title. This shows up on the assigned user's calendar and will give them "at a glance" information about the appointment.
    - **Body**: Enter notes into the body. This information will help the user complete the appointment more effectively. Click on the Open Merge Window button to insert merge fields into the appointment body (e.g. ~Contact.FirstName~ or ~Contact.Phone1~.)
    - **Assign to Contact's Owner**: Set to Yes if the user who is assigned as the contact owner is responsible for completing this task. Otherwise, set this to No.
    - **Assign to (backup)**: Select a user from the drop-down. This user will be

    assigned the task if "Assigned to Contact's Owner" is set to No OR if the contact has not been assigned an owner.
    - **Which Date?**: Select a standard date (e.g. Birthday) or custom field date (e.g. consultation date) to use as a basis for scheduling the appointment. You will schedule the appointment a specific number of days before or after that date. You can also create a new custom contact field if needed.
    - **Schedule the appointment**: The appointment is scheduled in relation to the date above. Here you set appointment a specified number of days before or after that date, choose the year, and set a specific time for the appointment.
    - **How long will the appointment last?**: Enter the amount of time that needs blocked out on the assigned user's calendar.
    - **(Optional) Notify these Users**: Select users who need to know when this appointment is created. They will receive a notification email.

6. Click on the **Save** button to create the appointment template.

7. (Optional) Click on the **Categories and Follow-Up Sequences** tab to assign this template to a category. The categories are used to organize and filter templates.

8. (Optional) Click on the **Misc. Expense** tab to assign a cost per person to this template. This is not commonly used with appointment templates, but the cost can include both the materials and labor to fulfill this appointment for each person.

9. Mark the appointment template as **Ready** and click on the **Save** button to apply the updates.