Post Appointment Follow Up Campaign

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for launching the Post-Appointment Follow Up campaign that you can download for free from the Infusionsoft Marketplace.

After an employee submits an internal form with the specific post-appointment communication, the contact receives a branded email with that information.

1. Download the Post-Appointment Follow Up campaign from the Marketplace

2. Publish the Campaign

   This campaign is 100% ready to launch, no setup required.

   1. Click the blue Publish button in the upper right; this will display a list of all items to be published.
   2. Click the green Publish button at the bottom of this list to publish the campaign.

3. Send A Post-Appointment Follow Up Email

   Your campaign is ready to go! The next time you need to send a post-appointment follow up email...

   If they are a new contact:

   1. Submit the "Send Post-Appointment Follow Up" internal form according to this tutorial .

4. If they are an existing contact:

   1. Submit the "Send Post-Appointment Follow Up" internal form according to this tutorial .