

Tagging Infusionsoft Contact records with Lifecycle tags


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The Infusionsoft setup wizard includes 5 steps: [Creation](#), [Classification](#), [Tagging](#), [Mapping](#), and [Tracking](#). Only ScheduleOnce Administrators can configure the Infusionsoft connector. You can access the Infusionsoft wizard by going to **Setup -> ScheduleOnce setup**, opening the left hand sidebar, and selecting **Integrations -> CRM**.

 **Important:**

You must be connected to your Infusionsoft account in order to setup the connector.

When a booking is Scheduled, Rescheduled, Completed, Canceled or set to No-show, Lifecycle tags are automatically added to Contact records. Tags help you divide your contact database into very specific lists so that you can enable automatic triggering of follow-up sequences and automated campaigns.

 **Note:**

If you wish to record a Customer as a No-show, you will need to manually change the status of the meeting from Completed to No-show in the Activity stream. [Learn more about tracking and reporting of no-shows](#)

Lifecycle tags are automatically updated at each stage of the booking lifecycle, reflecting the status of the booking. There are two types of Lifecycle tags applied to Infusionsoft contact records:

- **Generic lifecycle tags:** When multiple appointments are booked with the same contact, lifecycle tags represent the latest appointment status update. Generic lifecycle tags should be used to satisfy a campaign goal in the campaign builder. [Learn more](#)
- **Appointment-specific lifecycle tags:** These tags are identified by their Booking ID. For example: *Scheduled (Booking ID: BKNG-8JNM25GVS31X)*. Appointment-specific life cycle tags can be used when campaigns are run manually from the Infusionsoft Contacts module. [Learn more](#)

The following table lists the possible actions associated with bookings and the Lifecycle tags that will be created in each phase of the booking lifecycle. The Generic and Appointment specific lifecycle tags are identical, except that the Appointment-specific lifecycle tags include the appointment's Booking ID.

Action	Generic lifecycle tag	Appointment-specific lifecycle tag
The booking is created	Scheduled	Scheduled (Booking ID: BKNG-8JNM25GVS31X)
Customer rescheduled the booking	Rescheduled by Customer	Rescheduled by Customer (Booking ID: BKNG-8JNM25GVS31X)
Customer rescheduled a booking at the Owner's request	Rescheduled by Owner	Rescheduled by Owner (Booking ID: BKNG-8JNM25GVS31X)

Owner canceled the booking and sent a booking reschedule request	Canceled (reschedule requested by Owner)	Canceled (reschedule requested by Owner) (Booking ID: BKNG-8JNM25GVS31X)
The booking took place at the scheduled time	Completed	Completed (Booking ID: BKNG-8JNM25GVS31X)
Customer canceled the booking	Canceled by Customer	Canceled by Customer (Booking ID: BKNG-8JNM25GVS31X)
Owner canceled the booking	Canceled by Owner	Canceled by Owner (Booking ID: BKNG-8JNM25GVS31X)
Booking was marked as No-show	No-show	No-show (Booking ID: BKNG-8JNM25GVS31X)
User reassigned a scheduled booking	Scheduled (Reassigned by User)	Scheduled (Reassigned by User) (Booking ID: BKNG-8JNM25GVS31X)
User reassigned a rescheduled booking	Rescheduled (Reassigned by User)	Rescheduled (Reassigned by User) (Booking ID: BKNG-8JNM25GVS31X)
