

Offering Scheduling In Your Routing Form

Including scheduling within your Routing Form enables you to qualify your guests and ensure they schedule the appropriate type of meeting or connect with the correct host based on their specific needs. This feature not only improves meeting accuracy but also enhances the guest experience during scheduling.

Benefits of Offering Scheduling within a Routing Form

Integrating scheduling into your Routing Form provides several advantages:

- **Improved Guest Qualification:** Determines the right type of meeting or host for your guests, ensuring their needs are met effectively.
 - **Dynamic Information Collection:** Captures relevant and tailored information based on the meeting type being scheduled, making it more targeted and efficient.
 - **Enhanced Routing Precision:** Leverages the form's routing capabilities to direct guests to the most suitable scheduling option, saving time for both parties.
-

How to Add Scheduling to Your Routing Form

Follow the steps below to integrate scheduling into your Routing Form:

Navigating to the Flow Builder

1. Click on **Routing Forms** in the left-hand navigation menu.
2. Select the form you want to add scheduling to.

Adding the Schedule Action

1. Add the **Schedule** action from the **Add Interaction** pane on the right.
 2. Select what should be used to offer scheduling using the dropdown menu.
 3. Click on **Save**.
-

Advanced Options for Scheduling

- You can include multiple Schedule actions within your Routing Form to accommodate different guest needs.
- Pair scheduling actions with the Routing Form's conditional routing feature to guide your visitors to the most relevant scheduling option based on their inputs, preferences, or other qualifying criteria.

For example:

If a guest selects "Sales Inquiry" in the form, the system can route them to schedule a call with a sales representative. Alternatively, if "Customer Support" is chosen, they can be directed to book a support meeting.

For more details on setting up routing conditions, refer to our [Routing Your Interactions article](#).
