

Workflow Settings with Rainbow Booking: What's Workflow and what can I achieve using it?

You can automate every action related to your appointments and build business processes by using Workflow.

For example: When new appointment is booked, it can send an email to the customer, and the staff or admin.

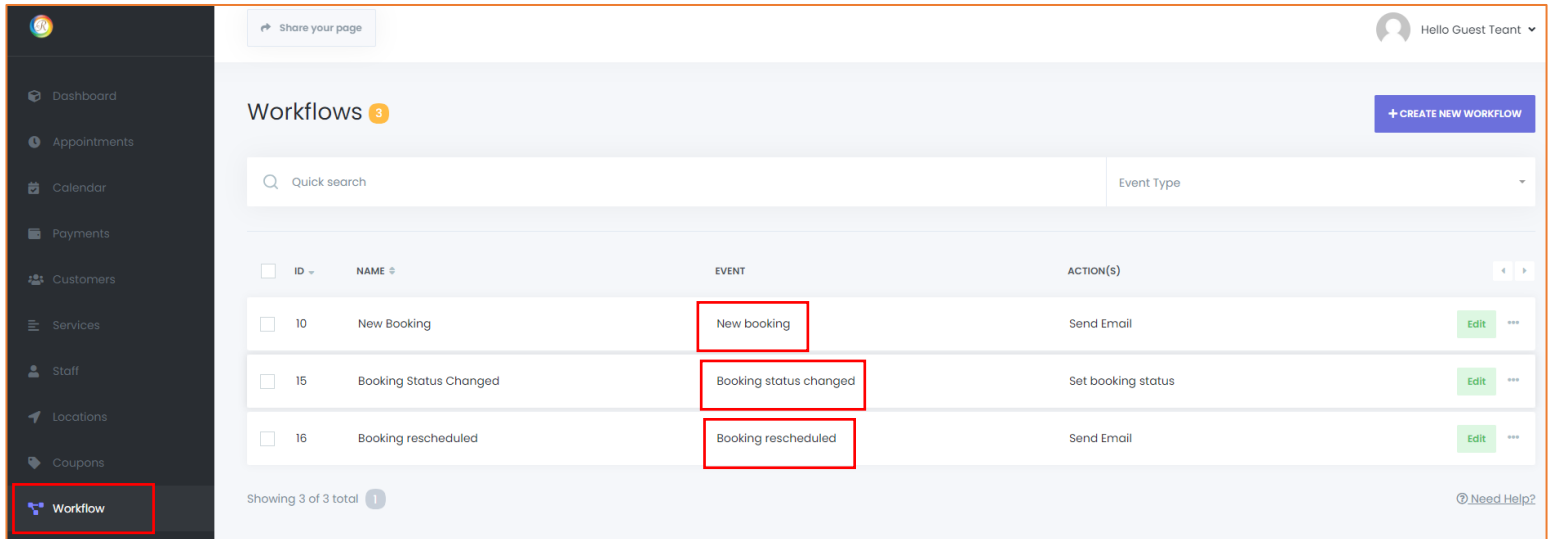
Zoom meeting link can be sent automatically to client, staff or admin by email when a service requiring Zoom session is booked from your site.

We can add many combinations to the list of what could be automated using Workflow. Let's provide you a very quick list out of the many supported actions using Workflow.

1. When a **new appointment is booked**.
2. When the **appointment is rescheduled**.
3. When **appointment status is changed**. (It's possible to build different set combinations based on the previous and present status of appointment)
4. When **appointment ends**. (Also, **Number of minutes after the end** of the appointment or **Number of minutes left till the end** of the appointment)
5. When a **new customer is created**.

You can trigger different actions when the provided conditions are met. With email sent out to that effect.

This list continues to grow and new triggers are added similarly to the booking system.



At the same time, you can create as many Workflow algorithms as you want and inside of these Workflow algorithms, you can setup various triggers.

Every trigger has its own fields. For Example, the Email trigger has: To, Subject, Body, and Attachment fields. 'To' field can accept multiple arguments. That means you can select a customer's email, staff's email, and even add a custom email (for instance admin's email) at the same time.

Also, you can select the email which you added to the custom field. You can improve the Subject and Body fields by using default keywords. The attachment field also accepts multiple arguments. For instance, you can add the URL of the PDF, select the PDF which was created using the Invoice addon or select the PDF which was created using the Custom fields addon.

You also options for different set of filters that you can use. For example: Using the Locale filter you can send an email in the language which the user uses on your site. Below is the full list of filters:

- Location filter
- Staff filter
- Service filter
- Locale filter
- Status filter

[Share your page](#)

[Workflows](#) > Edit workflow

Workflow name

Activated [SAVE](#)

When

 [Edit](#)

Do this

 [Edit](#) ✖
[ADD](#)

Share your page

Workflows > Edit workflow

Workflow name
New Booking

Activated

When
New booking

Do this
Send Email

ADD

Edit event settings

Locations filter
Select...

Service filter
Select...

Staff filter
Select...

Status filter
Select...

Called from
Both

Locale filter
English (United States)

CANCEL SAVE

Share your page

Workflows > Edit workflow

Workflow name
New Booking

Activated

When
New booking

Do this
Send Email

ADD

Edit action

To
Customer email Staff email

Subject
New Booking [appointment_id] [appointment_date]

Body

Dear {customer_full_name},
Thank you for booking with us. Please find below your booking information.

Appointment Date & Time {appointment_date_time}
Appointment Total Price: {appointments_total_price}
Service Name: {service_name}

Zoom Meeting Link for Online service: {zoom_meeting_ur}
Zoom Meeting Password: {zoom_meeting_password}

Enabled

CANCEL SAVE & TEST SAVE