

Live Workshop and Q&A

# Zanda Online Forms:

Automate Client Intake & Eliminate  
First-Appointment Admin

**WELCOME TO WORKSHOP**

Join Irina to build and automate  
your intake process live.



# What we'll be covering today



- 1 Online forms setup
- 2 Communication templates setup
- 3 Intake forms sending workflows
- 4 Tracking form completion

# 1. Online forms setup



- 1 Tools > Form Designer
- 2 Copy from Templates Library
- 3 Or, edit existing / create new form
- 4 Q&A

## 2. Communication templates setup



- 1 Tools > Communication > Templates\*
- 2 'First Appointment Confirmation' email
- 3 'Incomplete Forms Reminder' email & SMS
- 4 Q&A

\*Additional resource: [Communication Templates for Zanda Automations](#)

# 3. Intake forms sending workflows

1

Set up manual reminder template

2

Book first appointment with confirmation

3

Or, set up pre-appointment automation for First Appointment only

4

Q&A



# 4. Tracking forms completion

1

Incomplete Forms automation

2

Reports > Clients > Client Forms

3

Q&A





**Thank you  
for joining!**

**Any questions?**

