



[Knowledge Base](#) > [Gym Lead Machine](#) > [AI Agents & Premium Features](#) > [AI Agents](#) > [Set Up an AI Appointment Booking Workflow in GLM](#)

Set Up an AI Appointment Booking Workflow in GLM

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The following is a step-by-step guide on how to set up your own AI Conversational Appointment booking bot within a workflow.

Creating the AI Bot workflow and Trigger

1. Create Workflow

1. Go to Automation in the left menu of your GLM account.
2. Click to create a new workflow and select 'Start from Scratch.'
3. When the new Workflow generates, give it a title (i.e. 'AI Appointment Booking')
4. Select 'Add a Workflow Trigger'
5. Search for and select the actions you want to use as triggers for the AI Bot to begin conversing with your leads.

The most common trigger option will be 'Customer Replied.' In the filters you can select a specific Reply channel (i.e. Instagram DM). You can also use additional filters to exclude certain groups, like anyone with the tag 'client' so you aren't prompting your current clients to book just because they sent you a message.

Save your trigger action before continuing.

Workflow Trigger

Adds a workflow trigger, and on execution, the contact gets added to the workflow

CHOOSE A WORKFLOW TRIGGER

Customer replied

WORKFLOW TRIGGER NAME

Customer Replied

FILTERS

Reply channel

Instagram DM

Doesn't Have Tag

client

+ Add filters

2. Click to add the first Workflow action.

Select the 'AI appointment booking bot' in the workflow options.

3. In the sidebar editor that appears, set up the following for the bot:

1. Select the calendar into which the bot will book the lead - This is likely your Free Intro calendar.
2. Set the "Total bot processing duration" - This is how long before the bot will time out if there are no replies from the contact.
3. Turn on the 'Send first message?' check box
4. Enter the SMS message that will be sent to the prospect from the bot.
5. Save the action.

Add Appointment Booking Ai Bot



Add contact to AI Bot flow for appointment booking. The bot will converse with user and try to book the appointment on the selected calendar

ACTION NAME

AI Appointment booking bot

CALENDAR

Sales Call (Customer Support)

TOTAL BOT PROCESSING DURATION (HOURS)

24

☒ Send First Message?

TEMPLATES

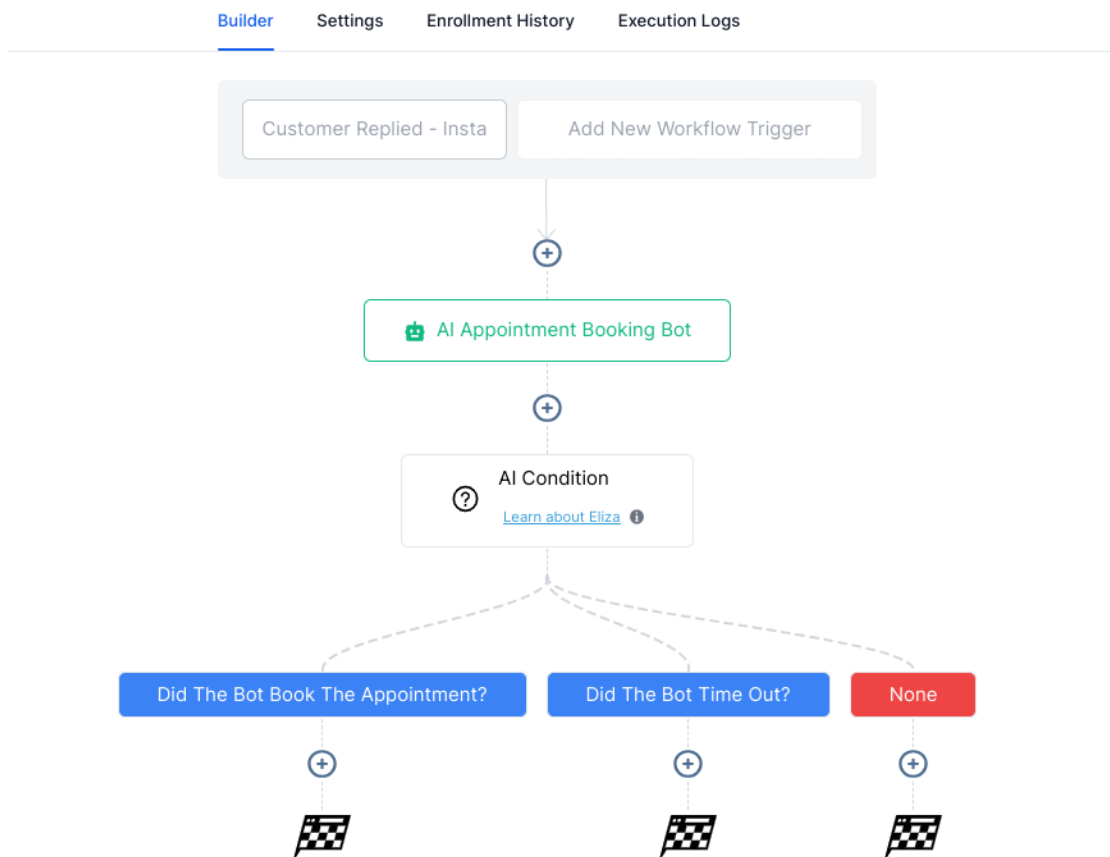
Select Template

MESSAGE

Custom Values  

Hi {{contact.first_name}}, this is the AI Bot from Kilo. Would you like to chat with our team to find out how I can help book appointments for your gym?

When you click to save the AI Bot action, 3 branches will appear below the action automatically.



The AI conversation will now proceed in one of three ways.

1. The bot successfully books the appointment - At this point, the workflow will conclude.
2. Bot timed out - The appointment was not booked as the lead didn't respond to the prompts by the bot.
3. The appointment could not be booked for other reasons - No suitable slot, the bot could not understand the query, or other technical issues.

Create any actions needed based on the bot booking an appointment

1. Click to add a new Workflow action.
2. Search for and select the 'If / Else' action.
3. Change the word 'Condition' to 'Did the bot book the appointment?'
4. Change the word 'Branch' to 'Yes.'
5. Under Segments, select 'AI Bot' in the first drop-down menu.

6. In the send drop-down, select 'Booked Appointment.'
7. Save action.

The screenshot shows a 'Condition' configuration window. At the top, it says 'Condition' and 'Fork the contact's journey through this workflow based on conditions'. Below this is a 'CONDITION NAME' field containing 'Did the bot book the appointment?'. Underneath is a 'BRANCHES' section with a 'Yes' branch. Inside the 'Yes' branch is a 'SEGMENTS' section containing two dropdown menus: 'AI Bot' and 'Booked Appointment'. To the right of the 'SEGMENTS' section are two buttons: '+ Add Condition' and '+ Add Segment'. At the bottom right of the 'BRANCHES' section is a '+ Add Branch' button.

8. Now you have a condition with two branches in your Workflow based on the question, "Did the bot book the appointment?"
- If yes, the checkered flag means the workflow will end. If not, we'll need to add new actions so the workflow can continue.

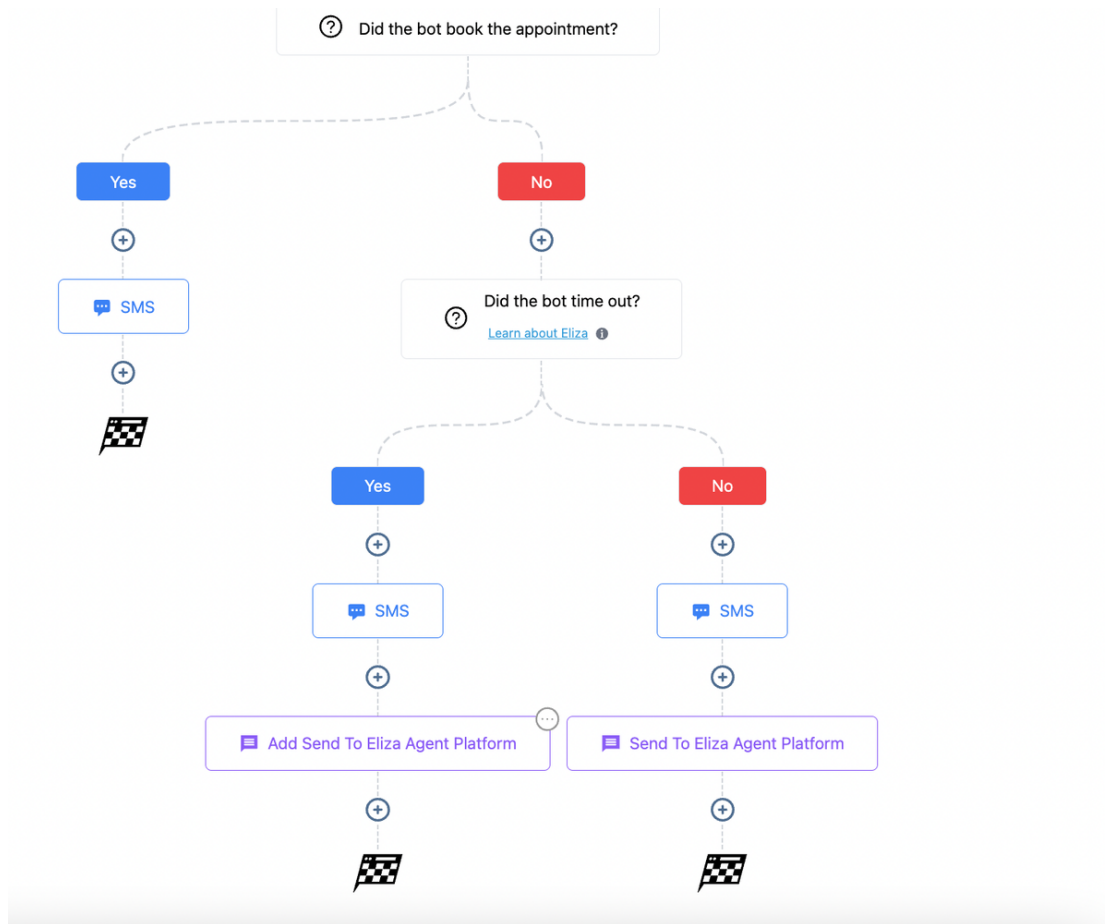
5. Create a message or any action for the appointment booked condition

The screenshot displays the Eliza AI bot configuration interface. On the left, a workflow diagram titled "Bot - No Confirmation msg" shows a sequence of steps: an "AI Appointment Booking Bot" action, a decision node "Did the bot book the appointment?", and two paths. The "Yes" path leads to an "SMS" action and then a checkmark icon. The "No" path leads to a decision node "Did the bot time out?", which then branches into "Yes" and "No" paths, each leading to an "SMS" action and a checkmark icon. On the right, the "Sms" action configuration panel is shown. It includes fields for "ACTION NAME" (SMS), "TEMPLATES" (Select Template), and "MESSAGE" (Appointment successfully booked. (message sent by workflow, not by bot)). There are also buttons for "Add attachment", "Add files through URL", "TEST PHONE NUMBER", "Send Test SMS", "Delete", "Cancel", and "Save Action".

6. Secondary condition if the appointment is not booked due to bot timeout

Here we want to know if the appointment was not booked because the bot timed out or for some other reason.

Common reasons could be that no slots were available or the bot failed to understand the conversation.



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