

Automating Client Booking and Payment for a New Service Business

One connected path from choosing an appointment to payment, confirmation, and reminders.

AT A GLANCE

10

workflow phases

5

connected platforms

3

automated emails

0

manual scheduling steps

CLIENT	SCOPE
A solo entrepreneur launching a consulting practice	Booking, payment, intake, and client communication workflow

01

THE CHALLENGE

Every booking depended on the owner.

Availability was handled by email. Payments came through PayPal or Venmo. Scheduling, payment, terms, and follow-up did not connect, so each client booking meant more manual work.

WHAT NEEDED TO CHANGE

- Let clients see real-time availability and book directly
- Collect payment before confirming the appointment
- Record acceptance of Terms & Conditions during checkout
- Send confirmation and reminders without owner follow-up

02

THE STRATEGY

Connect the tools into one client journey

Google Workspace, TidyCal, Stripe, and WordPress were configured as a sequential flow, with payment and documented terms built into the booking path.

01

Workflow design

Move from website visit to confirmed appointment without email back-and-forth.

- Real-time scheduling and calendar sync
- Conflict prevention across calendars
- Direct booking link and embedded site experience

02

Payment and terms

Make checkout a clear step before an appointment is confirmed.

- Stripe payment collection
- Terms & Conditions linked to checkout
- Payment confirmation triggers the next steps

03

AI-assisted build

Use AI to draft and troubleshoot portions of the setup.

- Initial Terms & Conditions draft
- Post-payment welcome trigger
- Integration troubleshooting where guides fell short

03

THE RESULTS

A booking flow that runs without manual scheduling

Clients can book through the website or direct link. Availability stays in sync, payment comes first, and the owner no longer has to coordinate every appointment by email.

THE CLIENT PATH

01

Choose a time

02

Accept terms

03

Pay securely

04

Receive details

Confirmation with meeting link and intake details

24-hour reminder

1-hour reminder

The workflow was tested end to end before handoff, including booking, payment, Terms display, calendar sync, confirmation, and reminders.

04

THE FULL BREAKDOWN

The work behind the automation

01

Workflow architecture

Designed a ten-phase booking and payment workflow connecting five platforms into a single automated sequence. Mapped each step from initial website visit through payment confirmation, calendar creation, and automated solopreneur communication, eliminating every manual touchpoint in the original process.

02

Tool integration and configuration

Configured Google Workspace as the calendar and communication backbone, connected TidyCal for real-time scheduling and conflict prevention, integrated Stripe for secure payment collection, and embedded the booking experience directly into the solopreneur's WordPress site.

03

Payment and terms setup

Replaced informal PayPal and Venmo collection with payment through Stripe before appointment confirmation. Terms & Conditions acceptance was linked to checkout so each transaction carried a record of consent.

04

AI-assisted development

Applied AI tools to accelerate the build and resolve technical gaps, including drafting the Terms & Conditions page, configuring the post-payment communication trigger, and troubleshooting integration issues where provider documentation was insufficient. This kept the project moving without reliance on outside developer support.

05

Automated client communications

Configured an immediate booking confirmation with meeting link and intake details, followed by a 24-hour reminder and a 1-hour reminder.

06

Quality assurance

Conducted end-to-end testing across the full workflow, verifying booking functionality, payment processing, Terms & Conditions display, calendar sync, confirmation delivery, and reminder scheduling before handoff.

BACKBONE OPERATIONS

CASE STUDY / BOOKING AND PAYMENT