**Automations for the Interviews/Orientation Schedule Google Sheet**

**(3/21/2023 TEST Spreadsheet “Spencer Test for Orientation in Pait.maine drive)**

**(We will make it live when like how it is working on the test spreadsheet)**

The purpose of the automations is to reduce the amount of time people need to spend inputting information onto the spreadsheet, and to automatically send out emails to pax inviting to sign up for an interview.

1. The sheet is the same as before, except:
   1. Don’t change any column headers (the titles in the first row of each column)
   2. Don’t delete any rows or columns
   3. Don’t use filters, or sort the rows or columns
   4. You can use the “Hide” function on rows you don’t want to see any more (for example, all the rows from prior years).
   5. If there are multiple rows with the same first and last name, there are going to be problems… So only one row per participant. Use the same first name and last name that appears in SugarCRM.
   6. Use the first name of the coordinator as it appears in SugarCRM (eg “Sammy” is Samuel in SugarCRM)
2. If you enter a new pax into the bottom row of the sheet, and put valid information into these columns,
   1. Date
   2. Coordinator
   3. Participant Last Name
   4. Participant First Name
   5. Email address (pax)
   6. Agent email to CC

THEN, click the checkbox and an email invite to Calendly will be automatically sent to

1. Pax
2. CC Coordinator email address
3. CC Agent email address

THEN, automatically, the date the email invitation was sent is entered into the “Date Emailed Participant” column (this might take 60 seconds).

1. When the pax schedules an interview time in Calendly, the system will automatically enter the time and date of the interview in the “Date Interview Scheduled” column of the spreadsheet.
2. When the interviewer enters the date of the completed interview into Sugar in the “Orientation Date” field in the “Orientations” tab of the contact record, the system will automatically send the Orientation Email to the Pax, with CC to Coordinator, and enter that date into the “Date in Sugar to trigger Welcome Email” column of the Spreadsheet.

Note: The system is pretty fast, but it might take a minute or so for the information to appear in the spreadsheet.