Turn Texts Into Bookings. Automatically.

How to use **Icons** and **Smart Campaigns** to capture, qualify, and convert every wellness client inquiry, without manual follow-up.

Problem	Icon to create	Smart Campaign to use	Smart Campaign Message
Client submitted form, but hasn't booked or paid	**Form Submitted: Not Yet Booked** Automatic Trigger: Client record shows a specific form completed, and no first booking on record.	**Completed form follow-up** Sends after [x] days if the client hasn't booked yet. Sends once per form submission only.	*"Hi {firstname}, thanks for submitting your information! We'd love to get your first session on the calendar. Grab a spot here: {me.widget}."*
Client called or texted, but got no response	**Missed Connection** Staff apply manually when a call or text goes unanswered.	**Respond to missed call / Respond to missed text** Sends right away to clients saved in your client list when a call is missed, or a text comes in with no reply. Rate-limited to once per client per 15 minutes.	*"Hi {firstname}, sorry we missed you! We'd love to get you scheduled. Book here: {me.widget} or reply and we'll help."*
New client has never paid or booked	**New Lead** Automatic Trigger: Client record shows created within the last [x] days.	**Convert to paying client** Sends after [x] days if the client still hasn't booked or paid. Skips anyone who already has an upcoming appointment or an active subscription.	*"Hi {firstname}, we'd love to help you reach your wellness goals! Any questions before booking your first session? Grab a spot here: {me.widget}."*
Had a consultation, but has not signed the contract	**Missing Contract** Automatic Trigger: Client record shows no contract signed.	**Send after appointment** Sends [x] day(s) after the consultation ends, asking the client to sign their service agreement.	"Hi {firstname}, it was so great connecting with you! The next step is signing your service agreement, once that's done you're all set."
New client was referred by someone, but hasn't booked	**Referral Lead** Automatic Trigger: Client record shows a referral as the lead source. Or, staff manually applies when a referral is confirmed.	**Welcome new client** Sends right away, or after [x] days, only to clients with the Referral Lead icon. Sends once per client only.	*"Hi {firstname}, we heard great things from {custom_referred_by}! We'd love to welcome you to our practice. Here's how to get started: {me.widget}."*

Don't Know Where to Start? Use PocketSuite's Smart Reports.

Run these reports to find your biggest lead gaps before you build your icons:

- **Bookings and Cancellations Report** — group by lead source and client to see which lead sources are converting into confirmed bookings and which aren't. The sources that aren't converting are where your icons and campaigns will have the most impact.
- **Client Conversion Report** — compares new clients versus paying clients and can be grouped by lead source. Use this to find where prospects are dropping off between first contact and first payment.

Build your icons around what the data shows, not guesswork.