

Configuring Salesforce connector settings on a Booking page

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The Salesforce connector settings section of a [Booking page](#) enables you to map the [Salesforce Record Types](#), configure the Salesforce Activity Event creation, and configure the integration when bookings are created using [General links](#) for your Booking page.

In this article, you'll learn how to configure your personal Salesforce connector settings for your Booking page.

In this article:

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Requirements

To configure the Salesforce connector settings, you must:

- [Be connected to Salesforce.](#)
- Be the [Owner or an Editor of the Booking page.](#)

Configuring the Salesforce connector settings

1. Hover over the lefthand menu and go to the Booking pages icon → Booking pages → your Booking page → **Salesforce settings** (Figure 1).

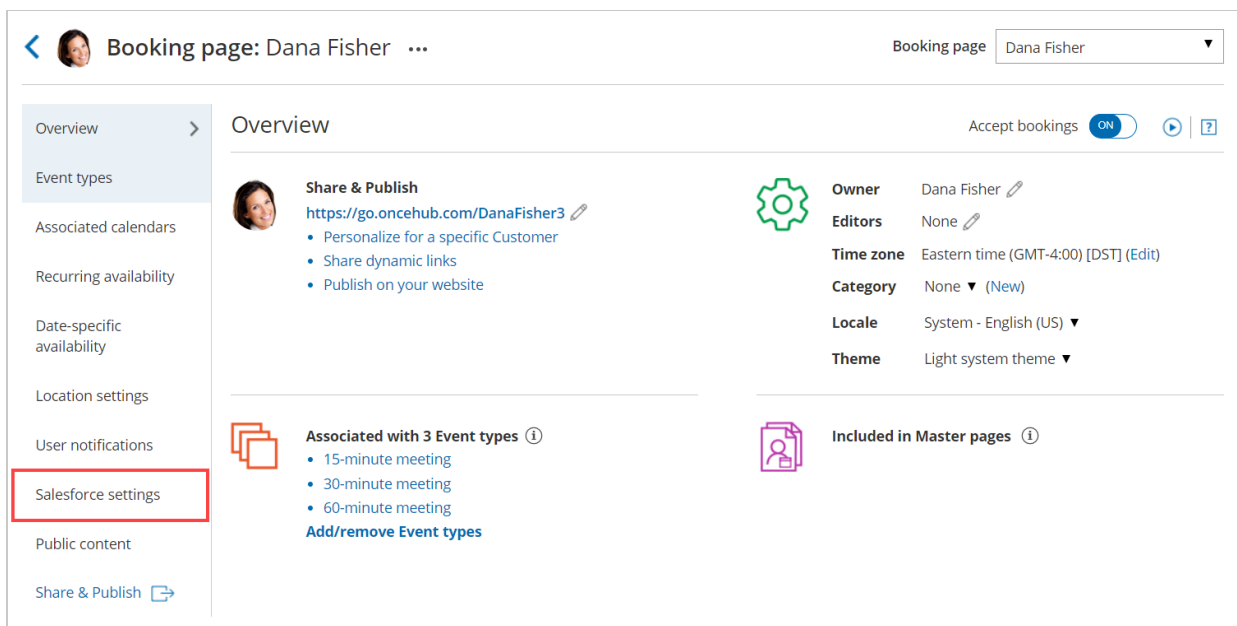


Figure 1: Salesforce settings on a Booking page

2. On the **Salesforce settings** page (Figure 2), you can map the [Record Types](#) for the supported objects, set up

the Salesforce Activity Event option, and choose the type of record to be created when using [General links](#).

Salesforce settings

Salesforce Record Types

Displaying Record Types assigned to the Salesforce Profile or Permission Set of danafisher@example.com [Learn more](#)

When a new booking is made, new records are created with a Salesforce Record Type:

Lead Record Type
Website Leads

Contact Record Type
Customer

Account Record Type
Enterprise

Case Record Type
-- Master Case Record Type --

Event Record Type
-- Master Event Record Type --

Salesforce Activity Event creation

When a booking is made

☒ Always create a Salesforce Event
☐ Do not create a Salesforce Event

Bookings created via General links

When a booking is made

☒ Create or update Salesforce Leads
☐ Create or update Salesforce Contacts
☐ Create or update Salesforce Cases
☐ Do not create or update Salesforce objects

When using [Personalized Salesforce links](#), the object integration is determined by the Salesforce Record ID passed in the URL.

Save
Discard

Figure 2: Salesforce settings

- In the **Salesforce Record Types** section, select the Record Type that should be assigned to the Lead, Account, Contact, Event, and Case objects. This section displays the [Salesforce Record Types](#) that are assigned to your Salesforce profile or Permission Set.
When a booking is made, new records are created with an associated Record Type in your Salesforce organization.
[Learn more about working with Record Types](#)
- In the **Salesforce Activity Event creation** section, select if you want a [Salesforce Activity Event](#) to be created when a booking is made.

 **Note:**

If you're using a third-party solution that syncs between your calendar and Salesforce, you should select the option **Do not create a Salesforce Event**. [Learn more about Salesforce Activity Events](#)

5. In the **Bookings created via General links** section, choose the object integration option you want for your [General links](#). You can decide to integrate your Booking page with the Lead, Contact, or Case object, or you can decide not to integrate the Booking page with Salesforce.

When you [use Personalized links \(Salesforce ID\)](#), the object integration is determined by the Salesforce Record ID passed in the URL.



Note:

When you work with [Salesforce Person Accounts](#), you will need to configure your Booking page to work with Contacts. When a booking is made, the Salesforce Person Account is automatically updated and a Salesforce Activity Event is added.