OnceHub Knowledge Base PDF

Created on: Apr 3, 2025

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Getting started with booking pages

Last Modified on Dec 15, 2023

Booking pages can be customized in many different ways. However, you only need to follow a few basic steps to start receiving bookings:

1. Set up your meetings
2. Customize your branding
3. Share your link

Step 1. Set up your meetings

Set your availability

You may have already configured your availability in the onboarding wizard. If you're satisfied with the rules you set for your availability, you can skip this.

Every User can set their own availability, which OnceHub applies to all the Booking pages they own. You can update your User availability in your profile by selecting your profile picture or initials in the top right-hand corner → **Profile settings** → **Availability** → **Scheduled meetings**.

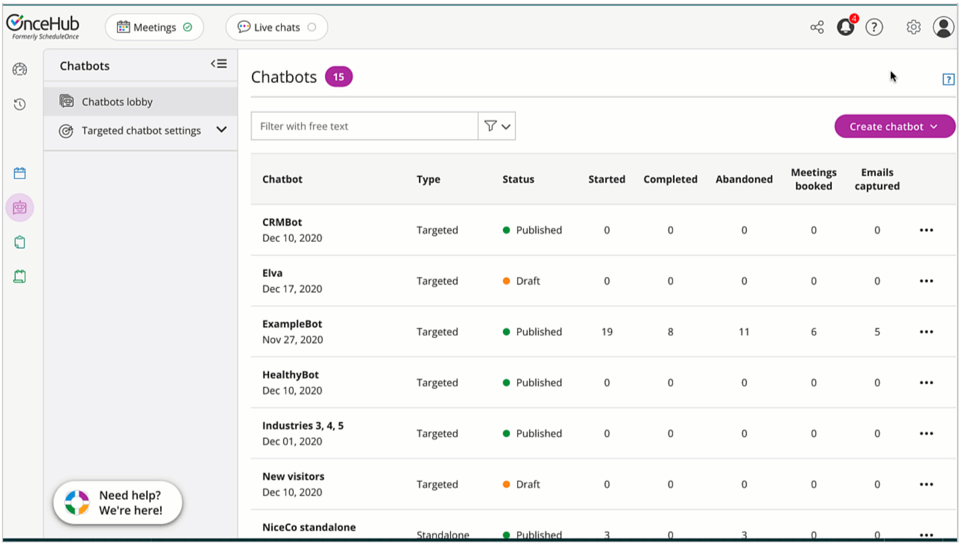

Figure 1: Update your availability

Learn more about your availability

Connect your calendar

With a connected calendar, OnceHub knows not to offer times you're busy to people booking with you. It also adds all booked appointments to your calendar automatically.

If you didn't already connect your calendar in the onboarding wizard, you can update your OnceHub profile and integrate. In the top right-hand corner, select your profile picture or initials → **Profile settings** → **Availability** → **Calendar connection**.

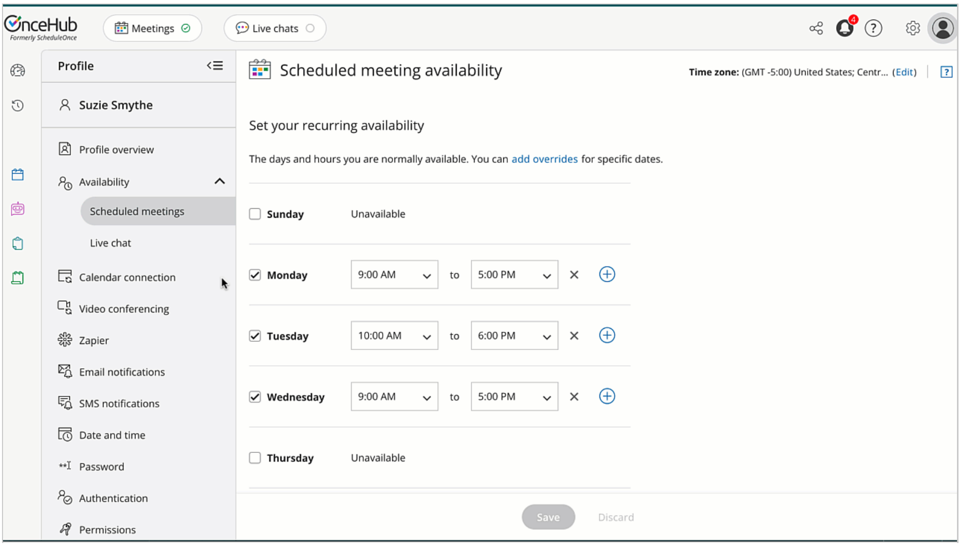

Figure 2: Connect your calendar

By default, OnceHub reads busy time from your main calendar. If your connected account has multiple calendars—for instance, one for work and another for personal events—you can opt to have OnceHub read busy time from them as well.

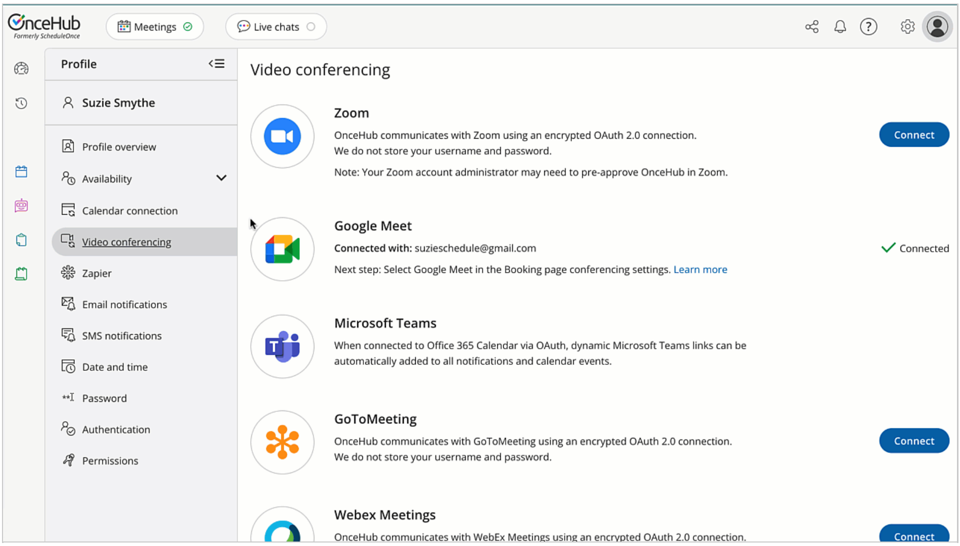

Figure 3: Associated calendars retrieving busy time

Learn more about how OnceHub reads busy time

Connect your video conferencing

Booking Pages seamlessly integrates your booking activities with Zoom, Google Meet, Microsoft Teams, GoToMeeting, or Webex Meetings through all phases of the booking lifecycle. When a booking is made, video conferencing session details are integrated with all Booking Pages notifications and a video conferencing session will be created automatically.

Your customer will receive all connection details in the scheduling confirmation email and calendar invite.

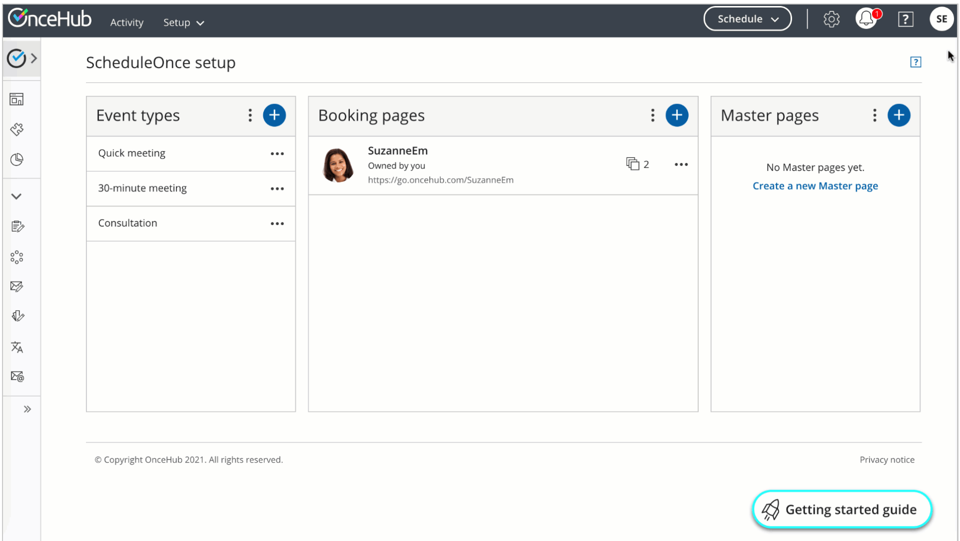

Figure 4: Connect to video conferencing

If you're taking video meetings, you'll need to update your Booking page to reflect this.

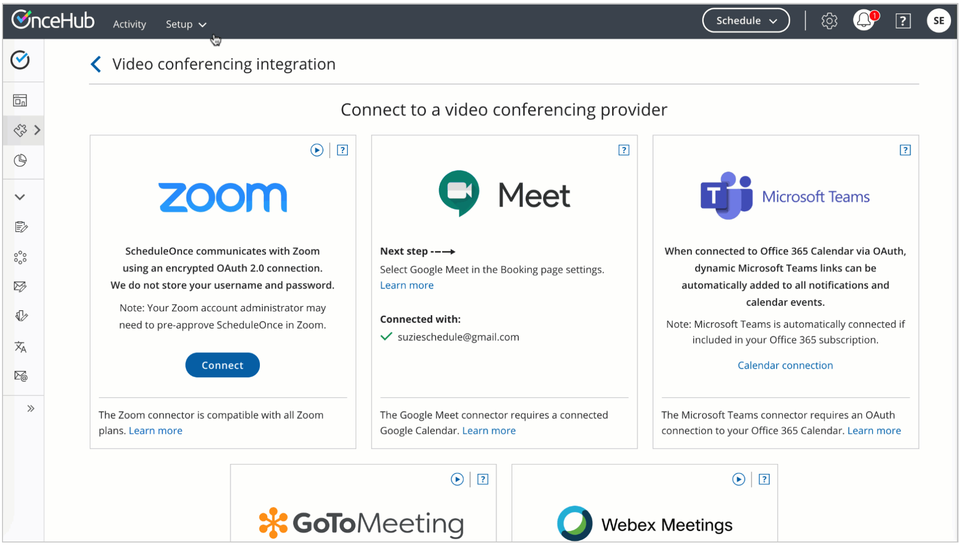

Figure 5: Add video conferencing to your Booking page location

Adjust Event types

You can offer one or more Event types to the people booking with you. With your new account, you have three Event types ready-made:

- 15-minute meeting
- 30-minute meeting
- 60-minute meeting

If you only want one or two, you can remove the extra from your Booking page. Hover over the left-hand menu and go to the Booking pages icon → **Booking pages** → your Booking page → **Event types**.

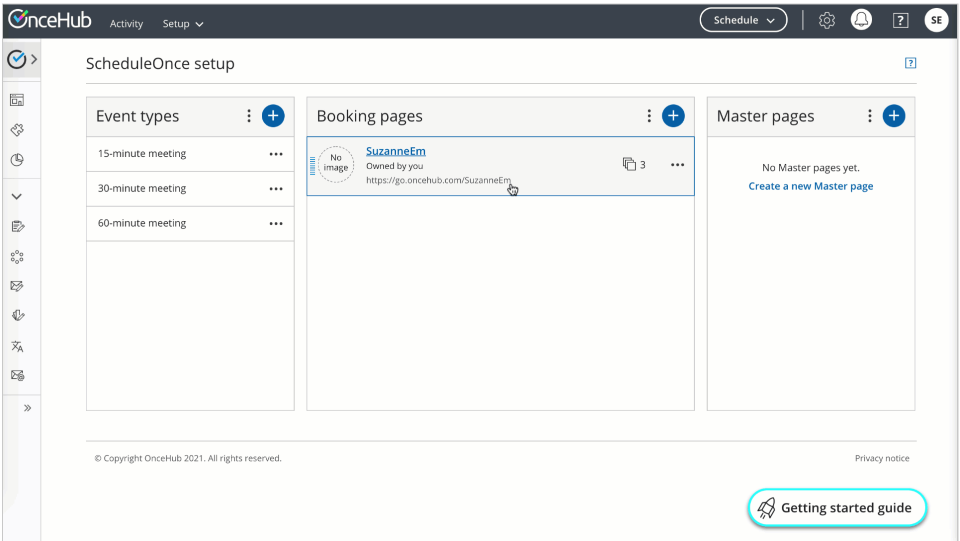

Figure 6: Adjust your Event types

If you'd like, you can adjust the Event types' names, time duration, and more by clicking Edit while you're adjusting the associated Event types at **Event types** → relevant Event type.

To update the name, click on the three horizontal dots next to the Event type's name and select **Primary settings**.

To update the time duration, go to **Time slot settings** → **Event type duration**.

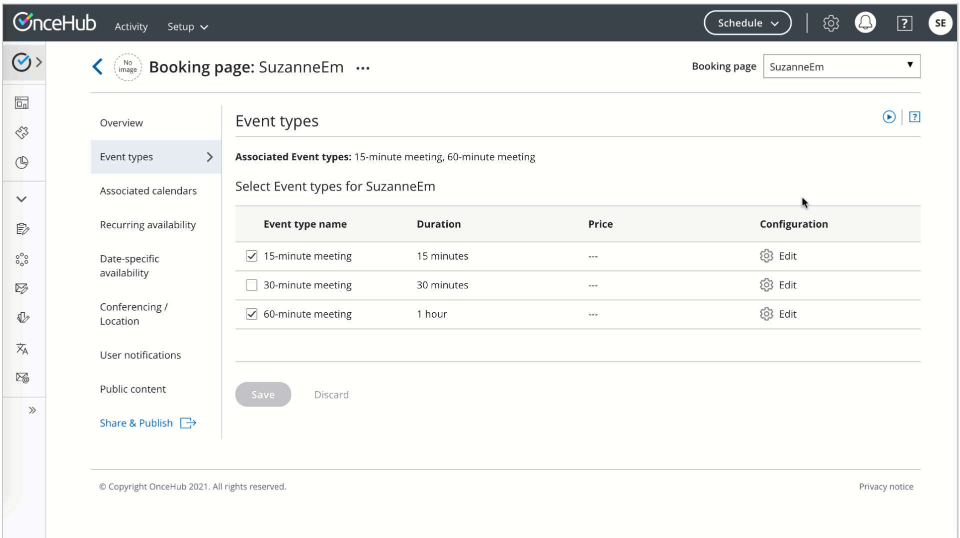

Figure 7: Update your Event type settings

Learn more about Event types

Step 2. Customize your branding

Add customer-facing details

You can include a headshot, welcome message, and more by updating the Public content section at **Booking pages** → your Booking page → **Public content**.

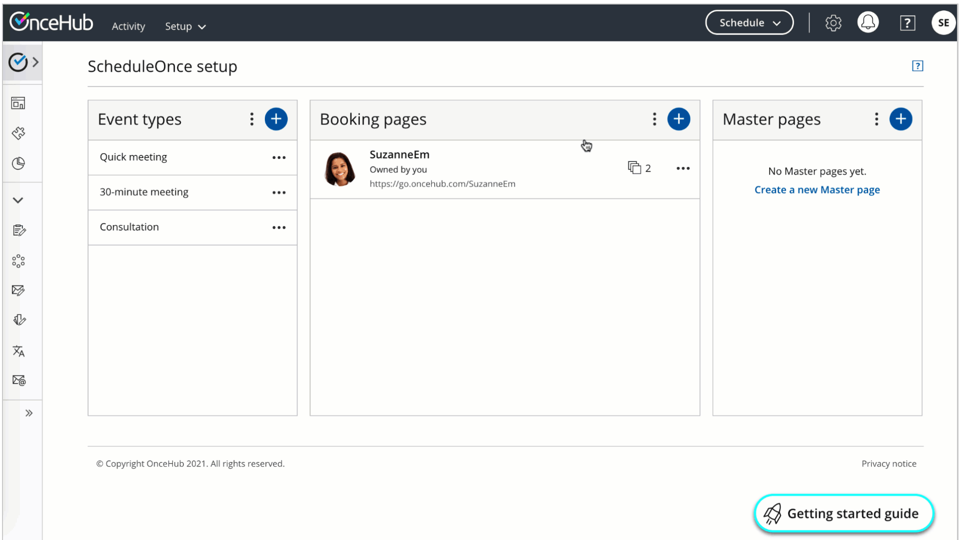

Figure 8: Add customer-facing details

Step 3. Share your link

You can grab your link to share it by clicking the quick share icon in the top menu.

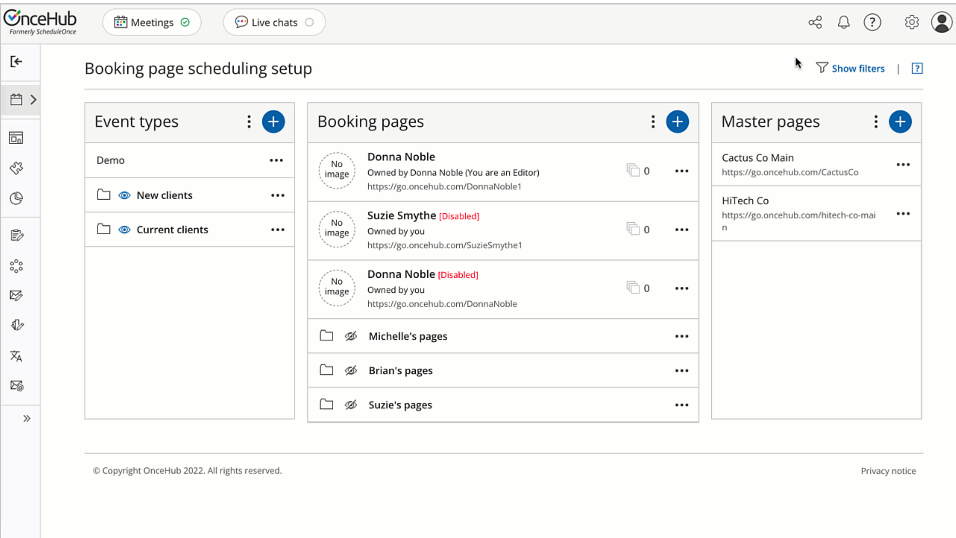

Figure 9: Share your link

That's it! You're all set to receive bookings.

Want to learn more?

- Offer multiple locations or conferencing options from a single link
- Make date-specific exceptions to your availability
- Manage your bookings

Getting started with chatbots

Last Modified on Aug 30, 2024

Here's a quick rundown of the most important things you should know about chatbots and how to create one.

How chatbots work

You can use chatbots for many things, but we think the best and most effective way to use chatbots are to engage with visitors, asking questions that qualify them to schedule meetings with your team or chat with them further.

After answering some questions, their answers determine whether they’re offered a time to schedule with your team or the opportunity to chat live with them.

We understand that personalization leads to better engagement in your visitors' experience. You can create a different chatbot for each experience your visitors may have, according to their needs and your business objectives. You can also create one chatbot with multiple paths, taking your visitors through the best interactions for them with conditional routing.

This allows you to customize their experience seamlessly, providing the most effective messaging for that specific audience under the given circumstances. It also raises the likelihood of identifying the right prospects for your team to engage with as high-quality leads.

Step 1: Create your chatbot

You can create as many chatbots as you like for different pages on your website.

You can access your chatbot builder by going to Chatbots on the left **→ Create chatbot** button.

Start from scratch: You'll start building your chatbot with a blank canvas.

Use a template: Choose chatbot one of our many, ready-made templates. The correct template saves time by providing an example chatbot you'll adjust according to preference.

Duplicate an existing chatbot: If an already-existing chatbot is similar to what you're wanting, you can duplicate that chatbot and tweak it to suit your preferences. Click the three dots on the right-hand side of that specific chatbot and select **Duplicate**.

Learn more about building a conversation

Step 2: Build your chatbot

Build a chatbot

Drag and drop interactions into the chatbot's column in the order you prefer.

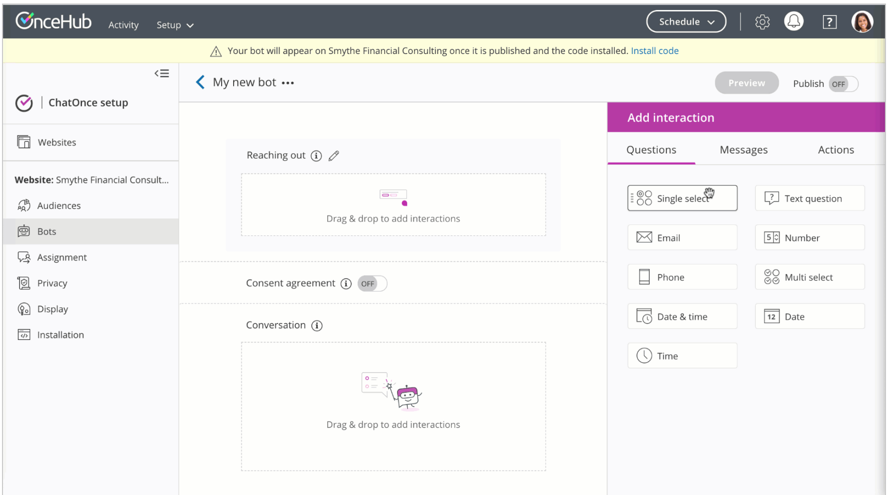

Figure 1: Add an interaction to your chatbot builder

You have many interaction options for your chatbot, allowing you to:

- Ask questions to qualify visitors
- Send follow-up questions depending on their answer, to personalize the experience further
- Offer scheduling or live chat to qualified visitors, based on their answers

Routing your interactions

You can route your interactions by choosing conditions and deciding which interaction they should see next.

You can use the **routing map** to view your interactions visually, creating and connecting the routing rules to different interactions.

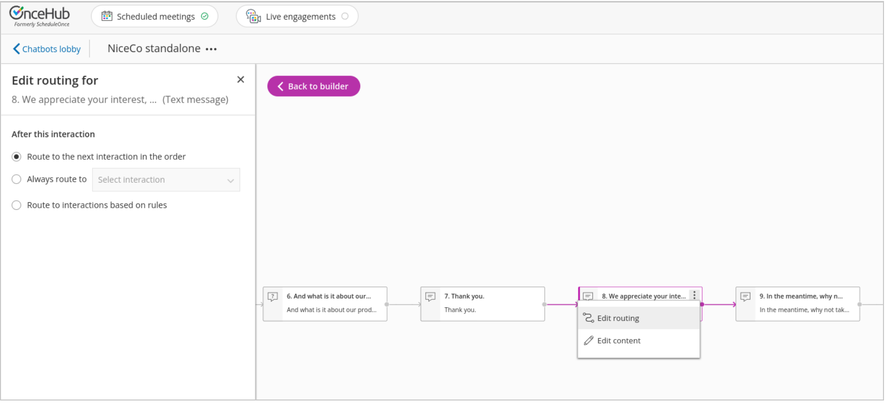

Figure 2: Route to interactions using the routing map

You can also add or edit routing rules on the **Routing** tab for each interaction.

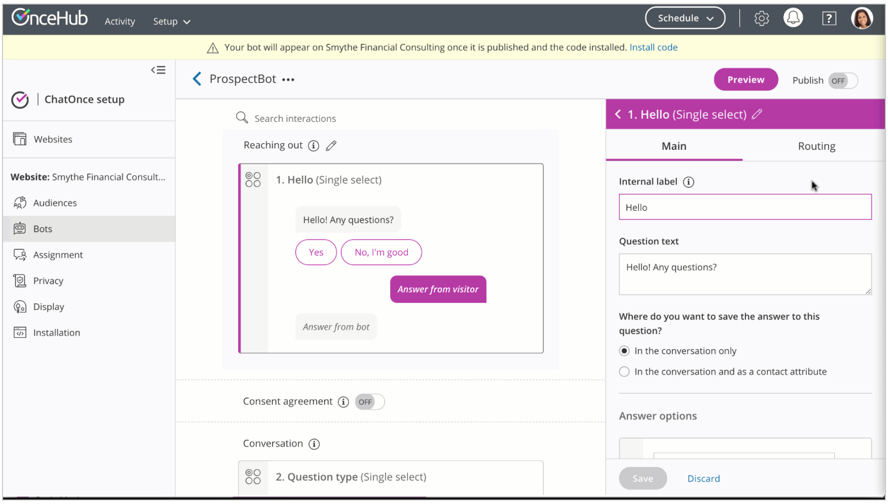

Figure 3: Route to interactions based on rules, using the routing tab

You can get really specific about the routing logic you want. The logic can depend on how your visitor answers the current question or a previous one. You can also base the logic on a contact field OnceHub already saved to their contact record (for instance, the **Company size** field).

Learn more about routing your interactions

Offer scheduling with your chatbot

Your chatbot can identify the people your team should speak to further and offer scheduling to them. Once they qualify, route them to a Schedule interaction.

The entire scheduling experience takes place as they chat to the chatbot.

You can add scheduling from the **Actions** tab.

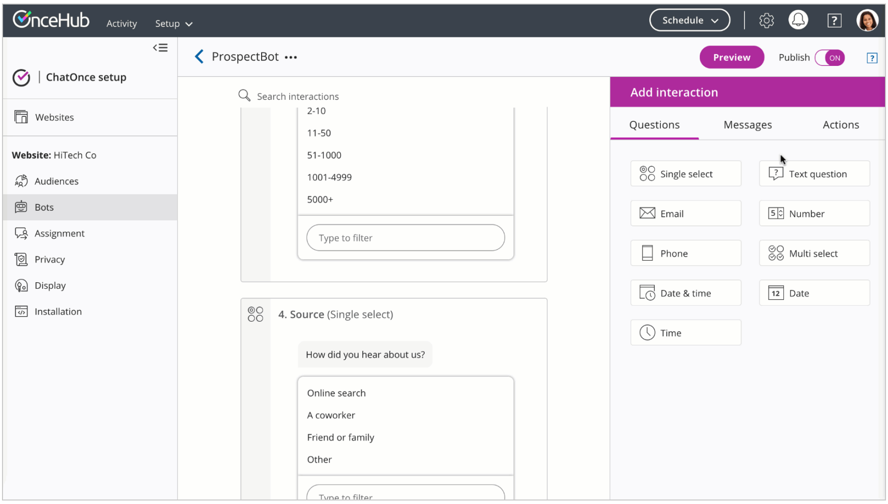

Figure 4: Add scheduling to your conversation

Offer live chat with your chatbot

If you want your high-quality leads to get in touch with you as possible, live chat can provide the experience your visitors desire while reducing your time to engagement.

Once you qualify visitors through the chatbot conversation, you can choose the right time to offer live chat to them. This way, people seriously interested in your product can ask questions and move to the next level in your funnel.

The entire live chat experience takes place as they chat to the chatbot.

You can add live chat from the **Actions** tab.

Step 3: Configure assignment for your team

In the **Assign** tab, you can assign new contacts to team members. This means they'll be the owner of that contact in their Activity stream.

1) Assign to a specific team member. If you select multiple people, they'll be assigned the contact based on round robin distribution.

2) If you offer scheduling, you can assign the contact to the team member who received the booking.

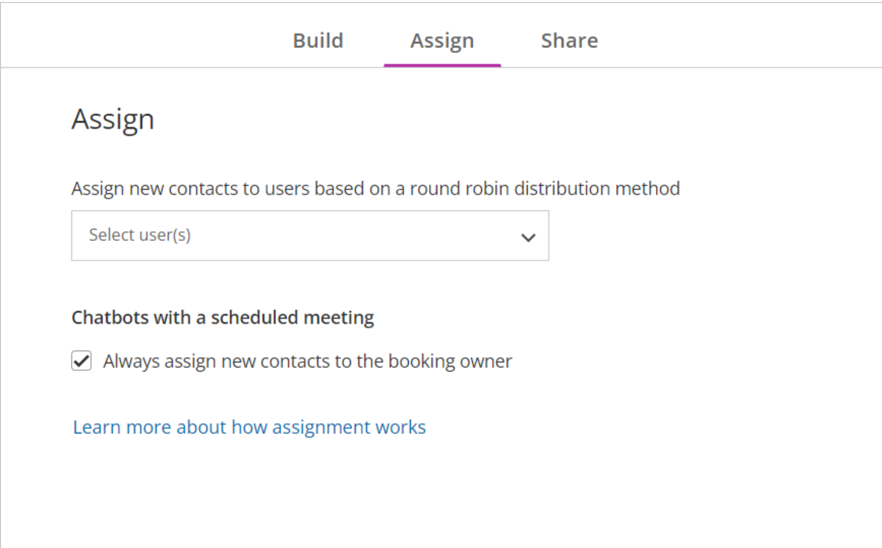

Figure 5: Assigning a team member

Step 4: Preview your chatbot

To see a preview, click on the eye icon at any time as you're building your chatbot. You can preview everything as your audience would experience it.

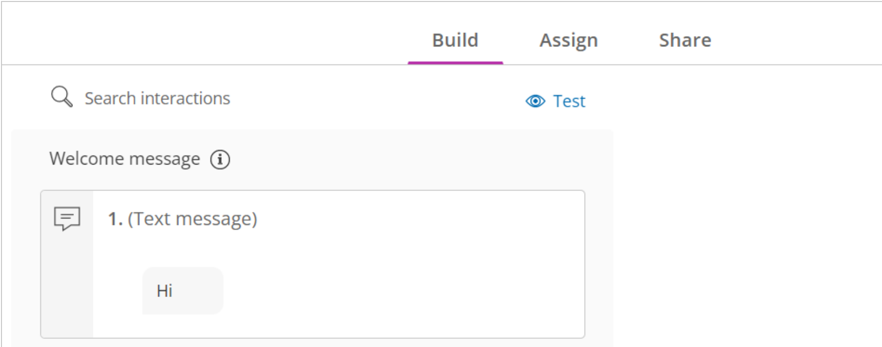

Figure 6: Preview your chatbot

Step 5: Publish and share your chatbot

Publish your chatbot

Once you're happy with your interactions and routing, you can publish your chatbot by toggling it on.

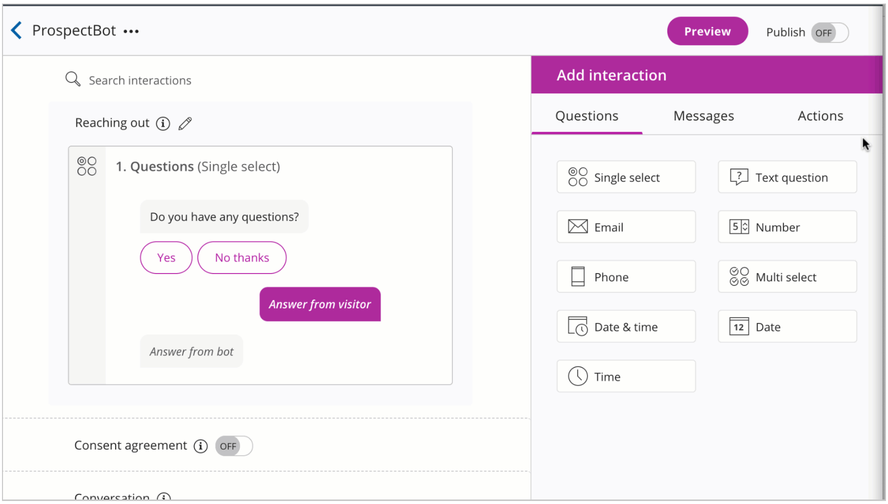

Figure 7: Publish your chatbot

Share your chatbot

Select the **Share** tab.

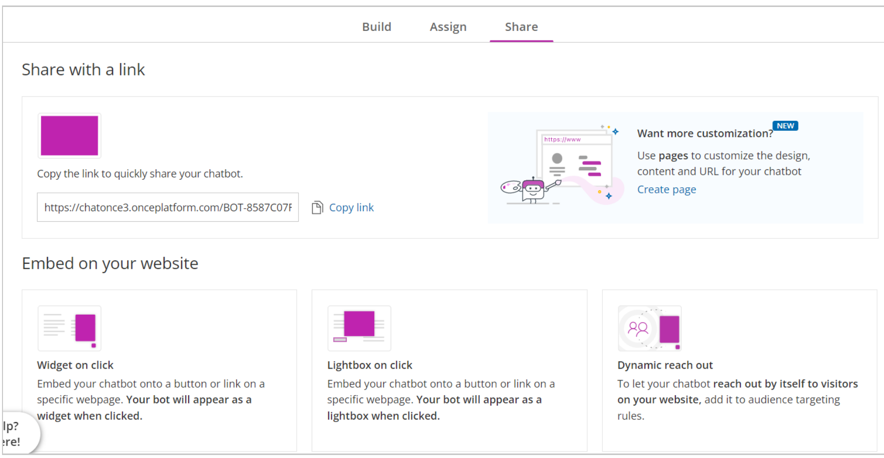

Figure 8: Share your chatbot

1. Share as a link

You can share your chatbot as a standalone page which requires no website. Simply copy the link and send it to whomever you like.

2. Share as a page

You can create a standalone page and add a chatbot to it. This option allows complete customization of your chatbot so that you can match it to your branding. Once you have customized the page, you can simply click on **Get page URL** at the bottom of the screen.

3. Embed on your website

Embedding your chatbot allows you to change the design of your chatbot. **Get the code** at the bottom right of the screen. You can paste the embed code in the admin area of your site, on whichever page(s) you'd like the chatbot to appear.

More resources to help with chatbots

1. Browse the chatbot articles: For those who like to read everything ;)
2. Integrate OnceHub with Zapier: Track your chatbot campaign effectiveness by sending triggered updates to a third-party app.
3. Hire professional services: Our expert team members can help you configure everything quickly and correctly.

Getting started with routing forms

Last Modified on Apr 3, 2024

There's so much you can do with forms, but here's a quick rundown of the most important things you should know as you're getting started. This guide shows you the main steps needed to take forms live on your website.

How forms work

The main purpose of forms is to engage with visitors on your website through a form, asking questions that qualify them to schedule meetings with your team or chat with them further.

After filling out a form, their answers determine whether they're offered a time to schedule with your team or the opportunity to chat live with them.

We understand that personalization leads to better engagement in your visitors' website experience. You can create a different form for each experience your visitors may have, according to their needs and your business objectives. You can also create one form with multiple paths, taking your visitors through the best interactions for them with conditional routing.

This allows you to customize their experience seamlessly, providing the most effective messaging for that specific audience under the given circumstances. It also raises the likelihood of identifying the right prospects for your team to engage with as high-quality leads.

Step 1: Create your form

You can create as many forms as you like for different pages on your website.

You can access your form builder by going to Forms on the left → **Create form** button.

Start from scratch: You'll start building your form with a blank canvas.

Use a template: Choose from one of our many, ready-made templates. The correct template saves time by providing an example form you'll adjust according to preference.

Duplicate an existing form: If an already-existing form is similar to what you're wanting, you can duplicate that form and tweak it to suit your preferences. Click the three dots on the right-hand side of that specific form and select **Duplicate**.

Learn more about building a form

Step 2: Build your form

Build a form

Drag and drop interactions into the form's column in the order you prefer.

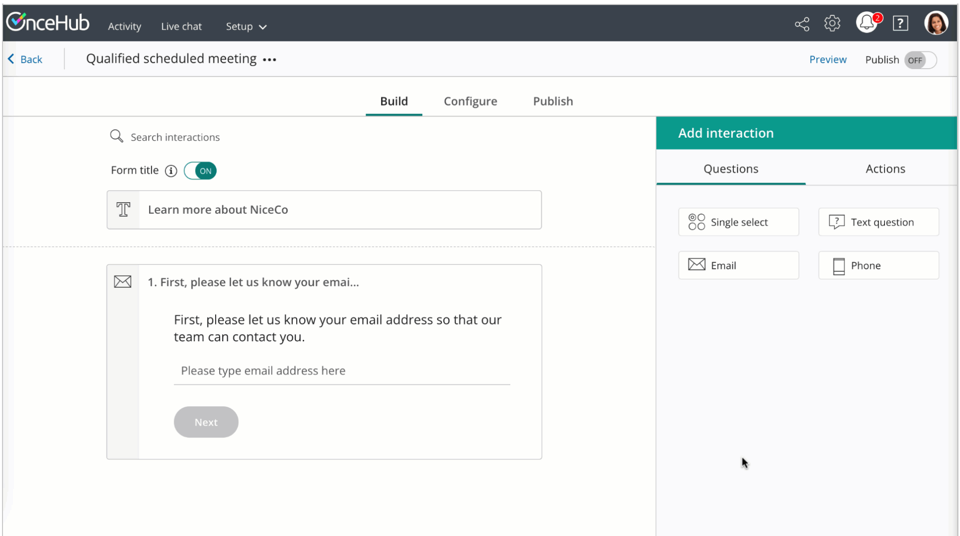

Figure 2: Add a form interaction

You have many interaction options for your form, allowing you to:

- Ask questions to qualify visitors
- Send follow-up questions depending on their answer, to personalize the experience further
- Offer scheduling to qualified visitors, based on their answers

Routing your interactions

You can route your interactions by choosing conditions and deciding which interaction they should see next.

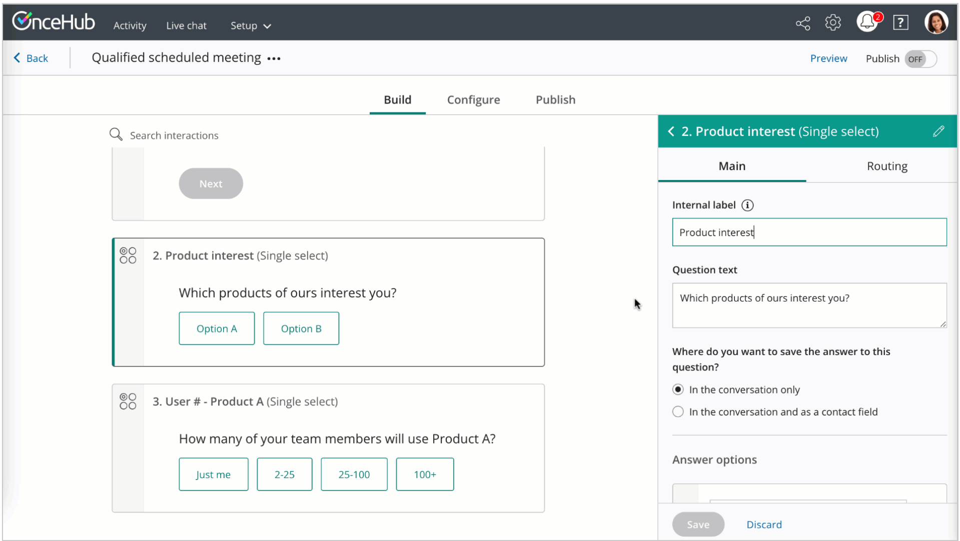

Figure 3: Route to interactions based on rules

You can get really specific about the routing logic you want. The logic can depend on how your visitor answers the current question or a previous one. You can also base the logic on a contact field OnceHub already saved to their contact record (for instance, the **Company size** field).

Learn more about routing your interactions

Offer scheduling with your form

Your form can identify the people your team should speak to further and offer scheduling to them. Once they qualify, route them to a Schedule interaction.

The entire scheduling experience takes place as they fill out the form.

You can add scheduling from the **Actions** tab.

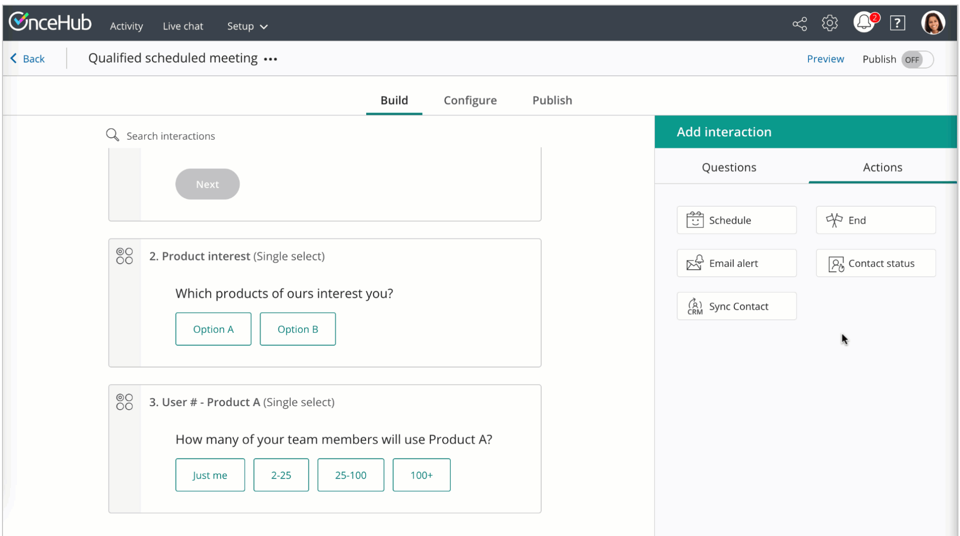

Figure 4: Add scheduling to your form

Offer live chat with your form

Your form can identify the people your team should speak to further and offer live chat to them. Once they qualify, route them to a Live chat interaction.

The entire live chat experience takes place as they fill out the form.

You can add live chat from the **Actions** tab.

Choose your design color

You can match your form's color to your website or your organization's branding.

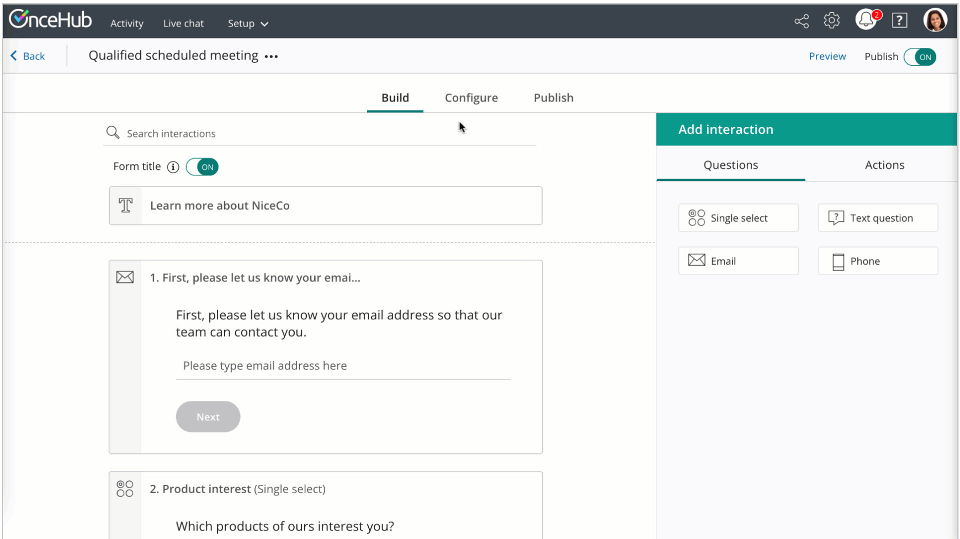

Figure 5: Choose a color

Step 3: Configure assignment for your team

In the **Assign** tab, you can assign new contacts to team members. This means they'll be the owner of that contact in their Activity stream.

If an admin has allowed member users to create and manage forms, members will be able to see any chatbots an admin assigned to them. Turn this permission on or off by selecting the gear icon in the top right corner **→ Settings and permissions → Member permissions**.

1) Assign to a specific team member. If you select multiple people, they'll be assigned the contact based on round robin distribution.

2) If you offer scheduling, you can assign the contact to the team member who received the booking.

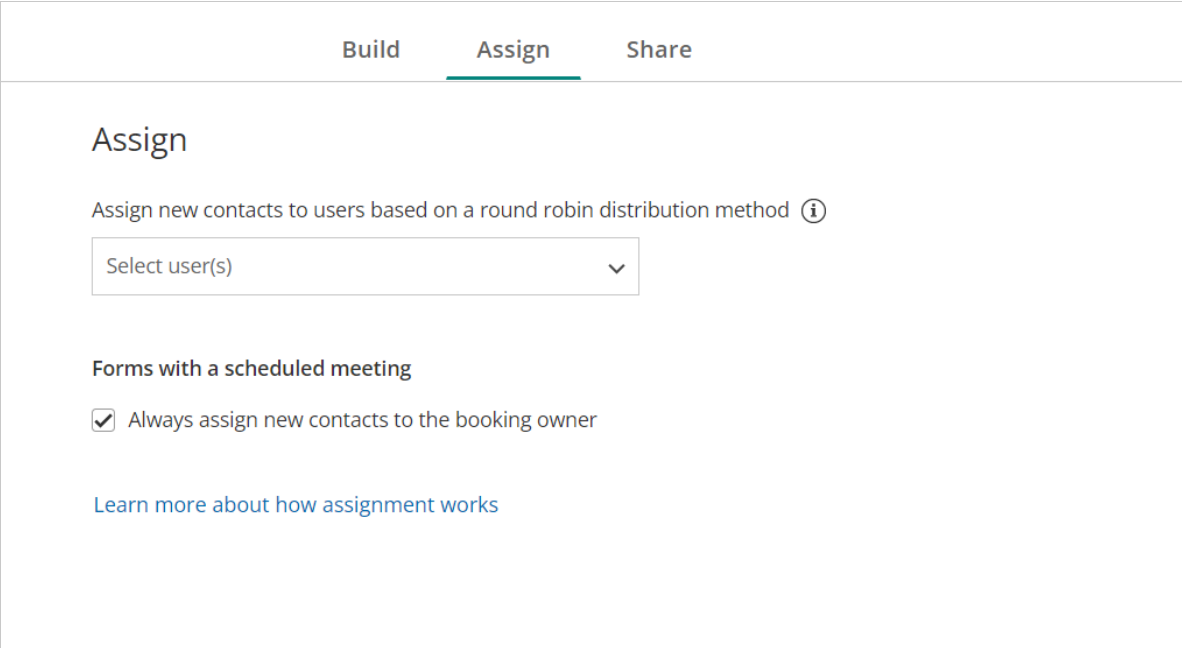

Figure 6: Assigning a contact to a team member

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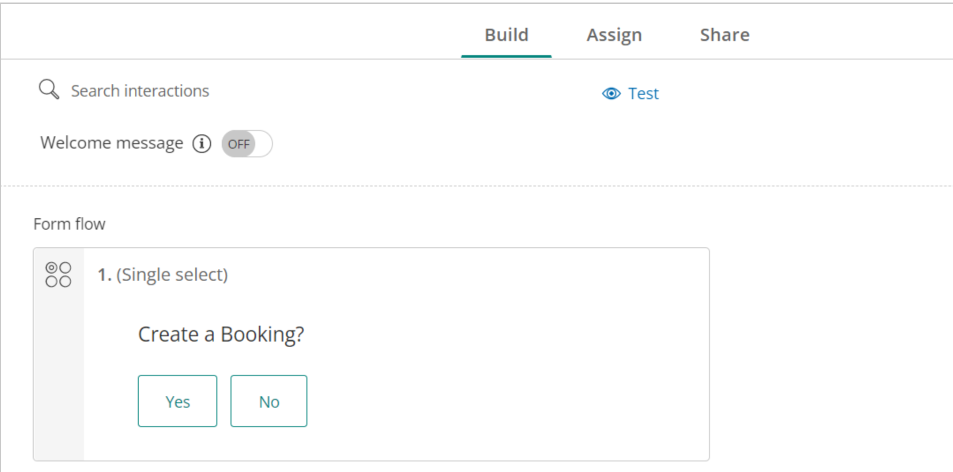


Figure 7: Preview your form

Step 5: Publish and share the form

Publish your form

Once you're happy with your interactions and routing, you can publish your form by toggling it on.

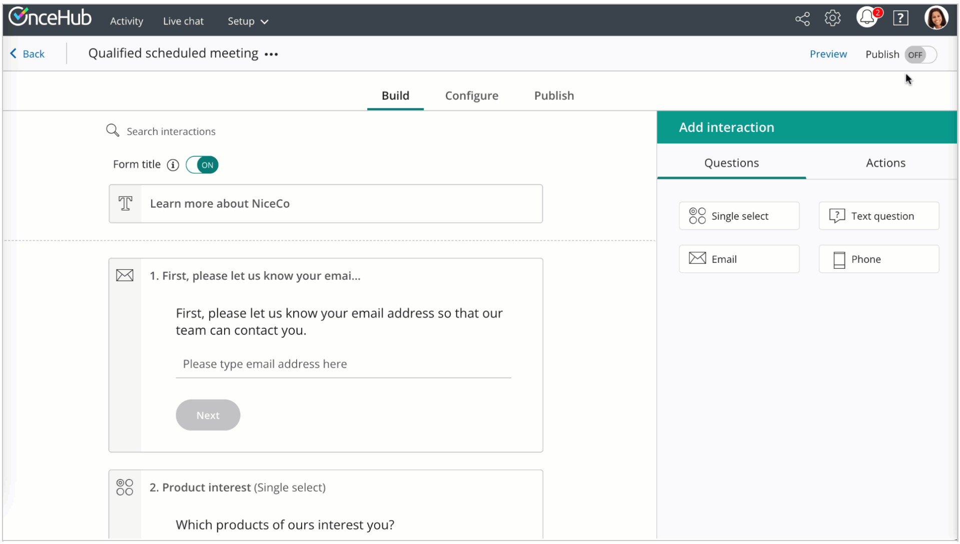
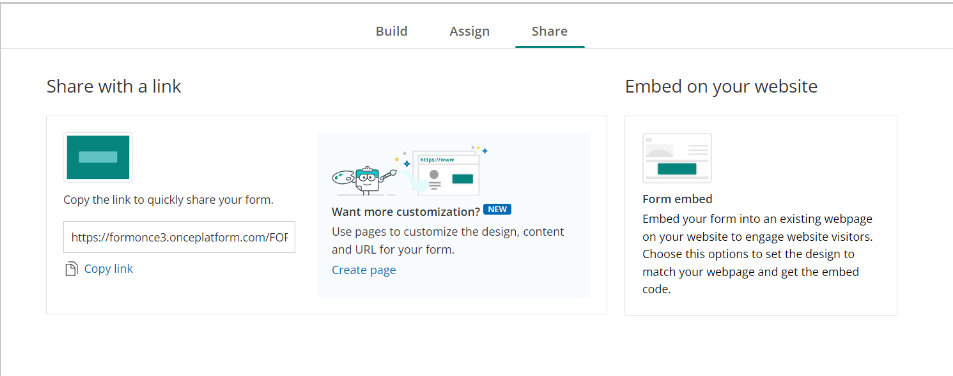


Figure 8: Toggle your form on for publishing

Share your form

Select the **Share** tab.



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More resources to help with forms

1. Browse the forms articles: For those who like to read everything. ;)
2. Check out our blog posts on forms: Go in-depth on popular scenarios
3. Hire professional services: Our expert team members can help you configure everything quickly and correctly.

Getting started with instant calls

Last Modified on Mar 2, 2023

What are instant calls?

Once you've qualified your website visitors through a chatbot or form, identifying the right people to offer an instant call, they can choose to meet with someone on your team immediately in Google Meet or Zoom.

This is similar to our live chat feature, except instead of connecting with them by typing in a chat window, back and forth, instead you're meeting them face-to-face in your preferred video conferencing app. This can be an advantage for sales calls and other interactions that benefit from a stronger emotional connection from the start .

How does it work?

Similar to live chat, you'll define the days and hours you're available for instant calls within your profile. The same availability is used for both live chat and instant calls. You can also set your availability manually by toggling it on or off in your account.

You can add an instant call action to a chatbot or form, just like any other interaction in the conversation flow. This can be based on how they answer previous questions, using conditional logic to route the appropriate visitors to people in your organization who are best equipped to assist them.

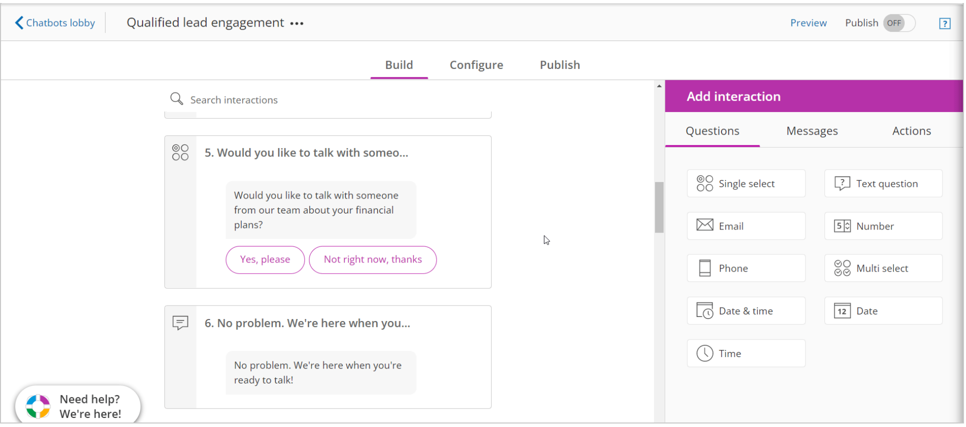


Figure 1: Add instant call action

You can either have all users take any instant call or create teams for specific profiles of customers. For instance, you may have a specific team for identified VIP prospects and another with specialized knowledge in a specific product or service.

OnceHub checks to make sure there's someone on the appropriate team available, and that their OnceHub profile is integrated with the relevant video call app. If no one is available with an active connection to the video call app, your conversation flow will not offer your visitor an instant call and will fall back to the next interaction defined in the flow.

What will my users experience on our end?

When someone accepts your offer of an instant call, you'll see this from within the live chat inbox, if you're currently marked as available.

Once an agent accepts an instant call, no other agents can take it. The agent accepting it has six seconds to start the meeting.

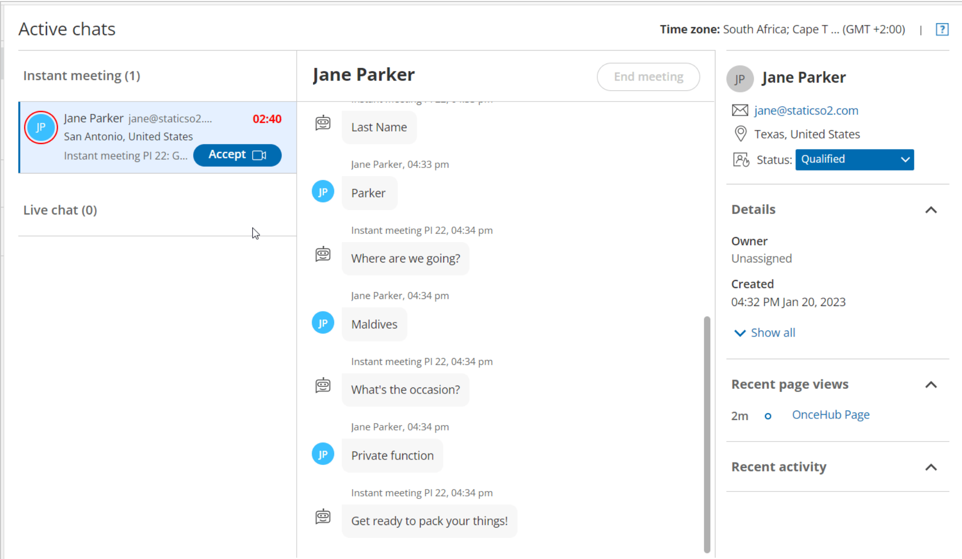


Figure 2: Accept call

A new browser tab will open with a generated call link. Be sure ahead of time that your users' browsers don't block new tabs from opening.

Once they've finished the meeting, the agent must click the 'end meeting' button in their integrated video call app. They will not be able to see and accept new instant call requests until the active call is ended.

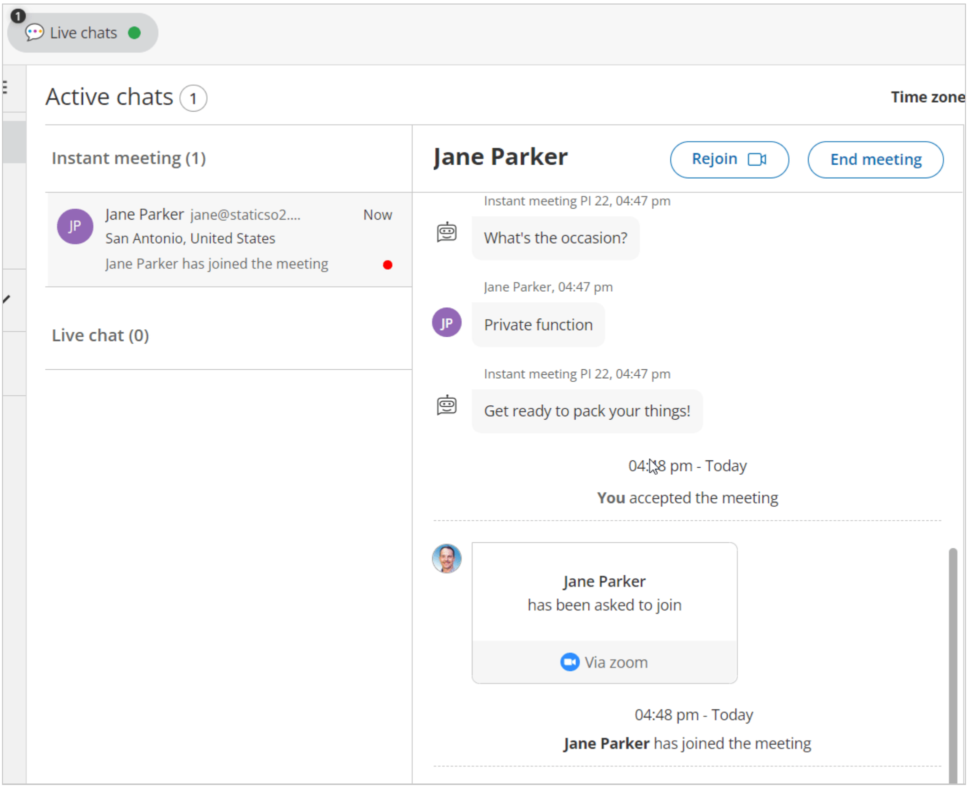


Figure 3: End meeting

How do I make sure my users notice a new instant call?

Make sure your users enable push notifications in their browser. OnceHub sends push notifications to the browser and also provides visual and audio notification within the OnceHub account, whenever there's a new visitor accepting an instant call offer.

If you'd like your users to be notified via another app like Google Chat, Slack, or Microsoft Teams, you can configure this using webhooks. When you're configuring the instant call action in the builder, go to the Webhook notification field and add the webhook URL. We recommend you test it to ensure the connection is successful.

Getting started with Booking pages

Last Modified on Dec 15, 2023

Booking pages can be customized in many different ways. However, you only need to follow a few basic steps to start receiving bookings:

1. Set up your meetings
2. Customize your branding
3. Share your link

Step 1. Set up your meetings

Set your availability

You may have already configured your availability in the onboarding wizard. If you're satisfied with the rules you set for your availability, you can skip this.

Every User can set their own availability, which OnceHub applies to all the Booking pages they own. You can update your User availability in your profile by selecting your profile picture or initials in the top right-hand corner → **Profile settings** → **Availability** → **Scheduled meetings**.

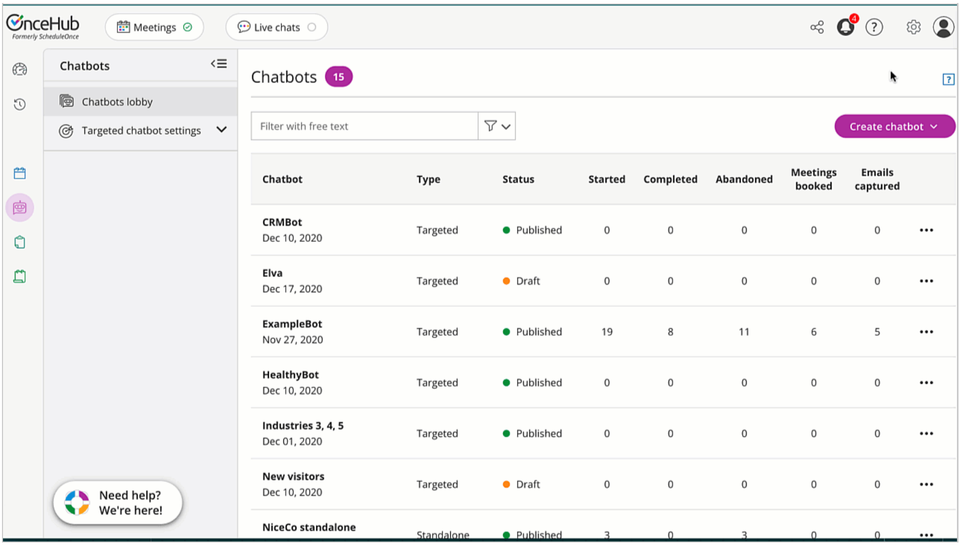


Figure 1: Update your availability

Learn more about your availability

Connect your calendar

With a connected calendar, OnceHub knows not to offer times you're busy to people booking with you. It also adds all booked appointments to your calendar automatically.

If you didn't already connect your calendar in the onboarding wizard, you can update your OnceHub profile and integrate. In the top right-hand corner, select your profile picture or initials → **Profile settings** → **Availability** → **Calendar connection**.

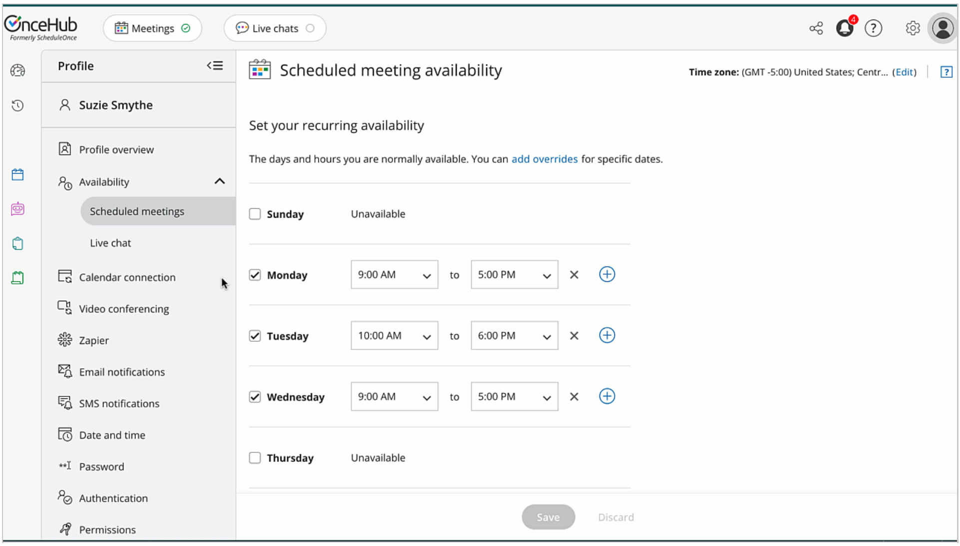


Figure 2: Connect your calendar

By default, OnceHub reads busy time from your main calendar. If your connected account has multiple calendars—for instance, one for work and another for personal events—you can opt to have OnceHub read busy time from them as well.

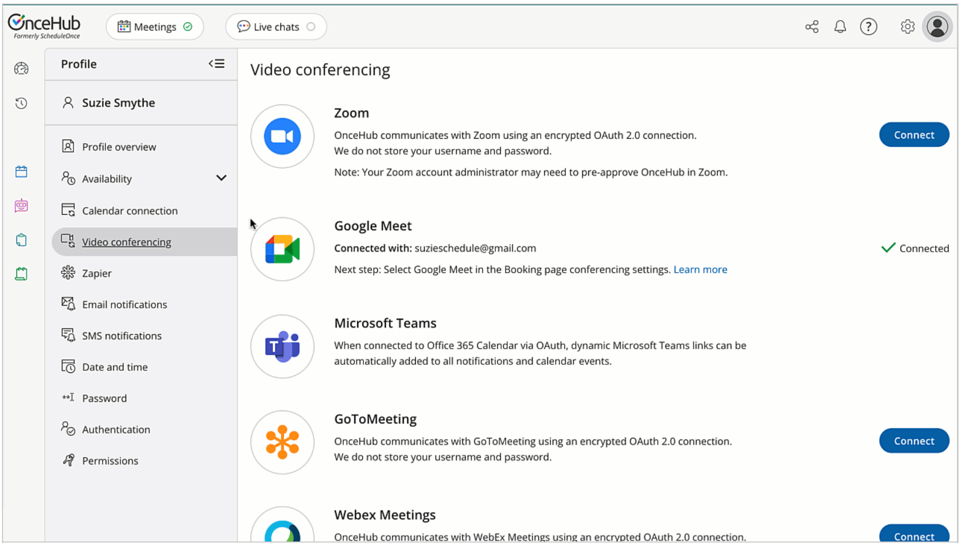


Figure 3: Associated calendars retrieving busy time

Learn more about how OnceHub reads busy time

Connect your video conferencing

Booking Pages seamlessly integrates your booking activities with Zoom, Google Meet, Microsoft Teams, GoToMeeting, or Webex Meetings through all phases of the booking lifecycle. When a booking is made, video conferencing session details are integrated with all Booking Pages notifications and a video conferencing session will be created automatically.

Your customer will receive all connection details in the scheduling confirmation email and calendar invite.

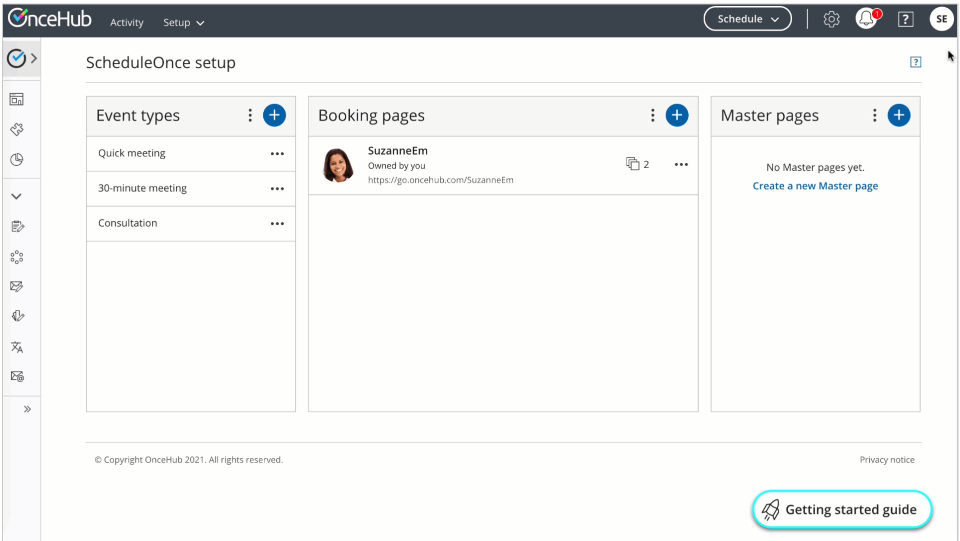


Figure 4: Connect to video conferencing

If you're taking video meetings, you'll need to update your Booking page to reflect this.

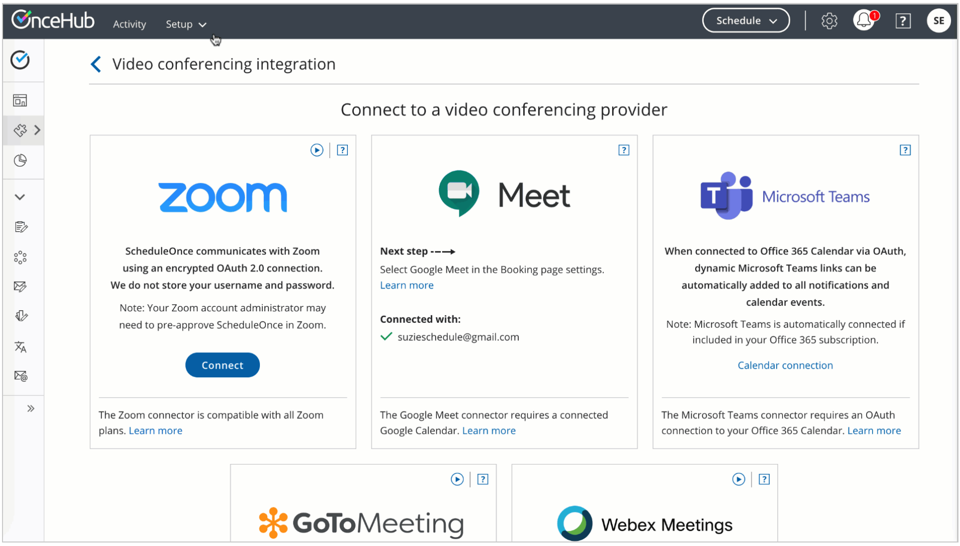


Figure 5: Add video conferencing to your Booking page location

Adjust Event types

You can offer one or more Event types to the people booking with you. With your new account, you have three Event types ready-made:

- 15-minute meeting
- 30-minute meeting
- 60-minute meeting

If you only want one or two, you can remove the extra from your Booking page. Hover over the left-hand menu and go to the Booking pages icon **→ Booking pages** → your Booking page → **Event types**.

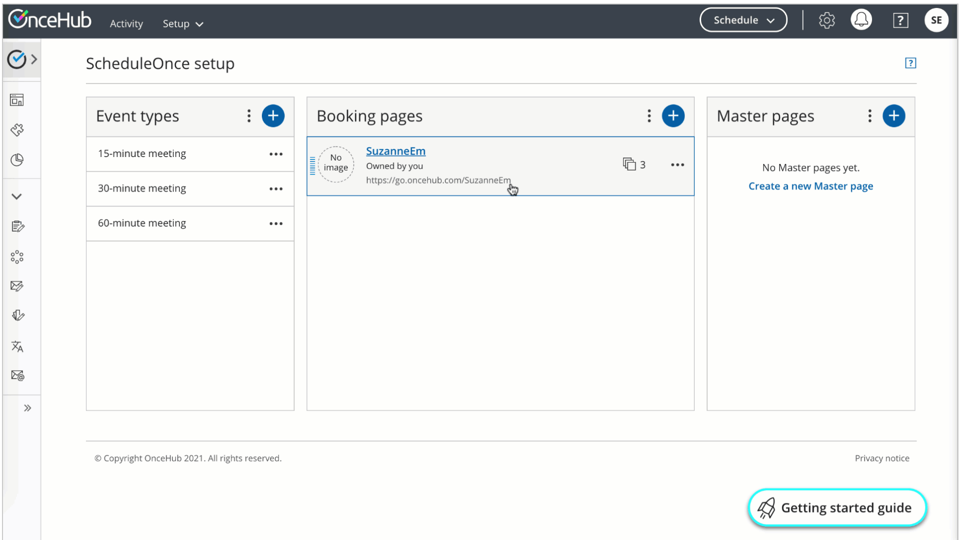


Figure 6: Adjust your Event types

If you'd like, you can adjust the Event types' names, time duration, and more by clicking Edit while you're adjusting the associated Event types at **Event types** → relevant Event type.

To update the name, click on the three horizontal dots next to the Event type's name and select **Primary settings**.

To update the time duration, go to **Time slot settings** → **Event type duration**.

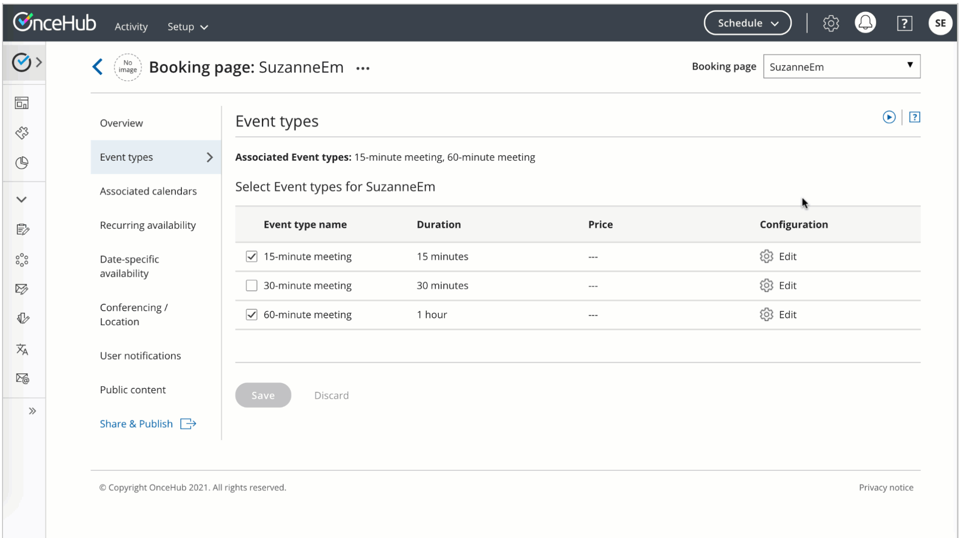


Figure 7: Update your Event type settings

Learn more about Event types

Step 2. Customize your branding

Add customer-facing details

You can include a headshot, welcome message, and more by updating the Public content section at **Booking pages** → your Booking page → **Public content**.

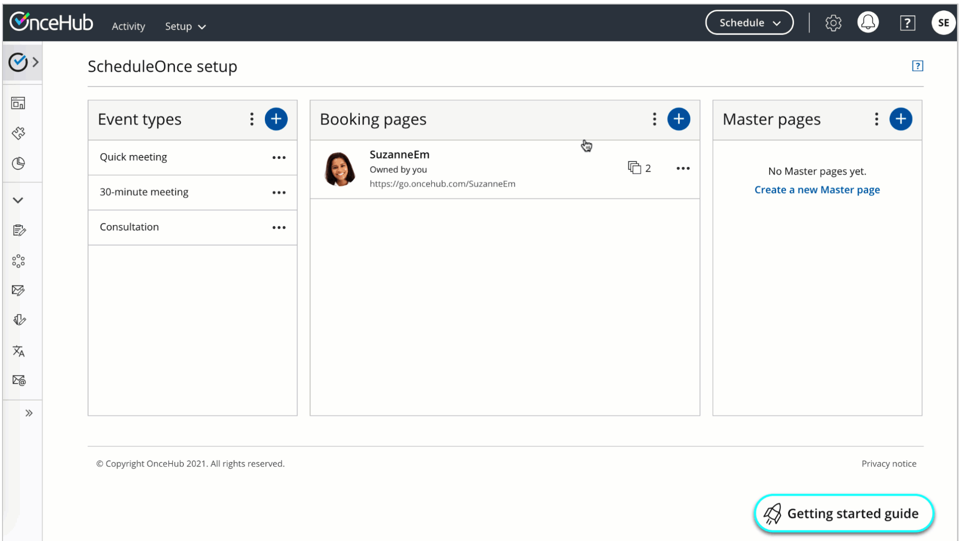


Figure 8: Add customer-facing details

Step 3. Share your link

You can grab your link to share it by clicking the quick share icon in the top menu.

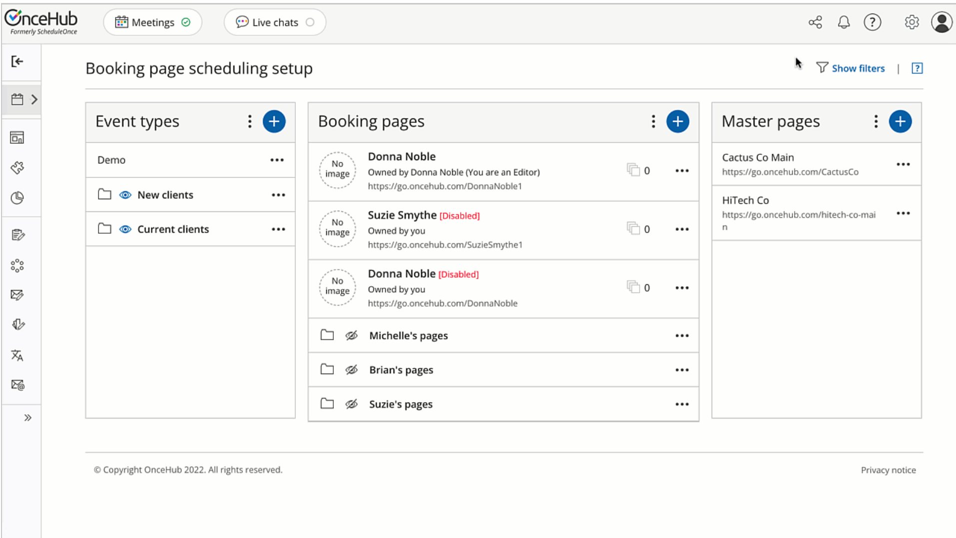


Figure 9: Share your link

That's it! You're all set to receive bookings.

Want to learn more?

- Offer multiple locations or conferencing options from a single link
- Make date-specific exceptions to your availability
- Manage your bookings

Adding Users

Last Modified on Oct 13, 2022

OnceHub is a true multi-user system, designed to meet the scheduling needs of large and small organizations. All OnceHub products share centralized User management, permissions, and security settings in your account.

In this article, you'll learn how to add Users to your account.

Requirements

You must be a OnceHub Administrator to add new Users.

Adding Users

1. Sign in to your OnceHub account.
2. In the top navigation bar, click the gear icon → **Users**.

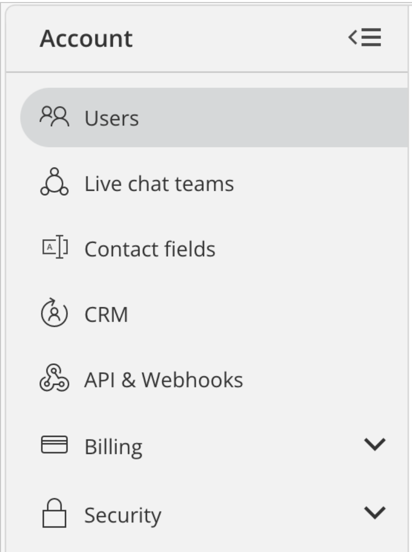


Figure 1: Users page

3. In the Users lobby, click the **Add Users** button (Figure 2).

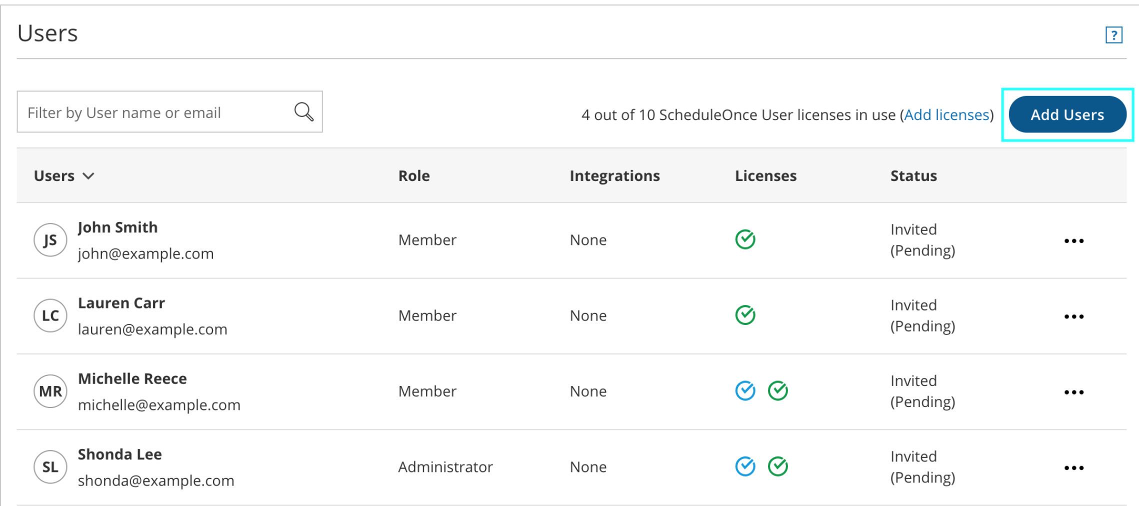


Figure 2: Users lobby

4. In the **Add Users** pop-up (Figure 3), type the new User's email address. This is the email address to which the invitation will be sent. The selected email address will also be used by the User to sign in.

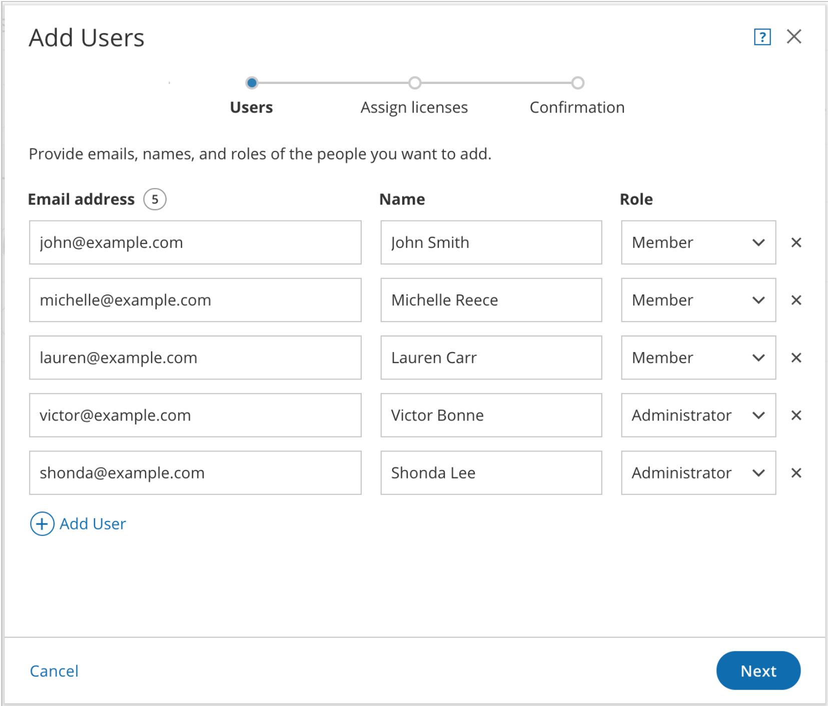


Figure 3: Add Users

5. Add the User's name. Include their first and last names.
6. Select the **User role**: Member or Administrator. Note that the User's role can always be updated by clicking on the User's profile in the User tab.
7. Add any additional Users through the same method by clicking the **+ Add User** link below the email address field.
8. Click **Next**.
9. Select which Users need to be assigned a license. Once you're satisfied with the assignment, click **Next**.
   Does my User need an assigned license?
   How to assign or unassign licenses to Users
10. Review the Confirmation page (Figure 4), which specifies how many Users you'll be adding and how many licenses you'll be assigning..

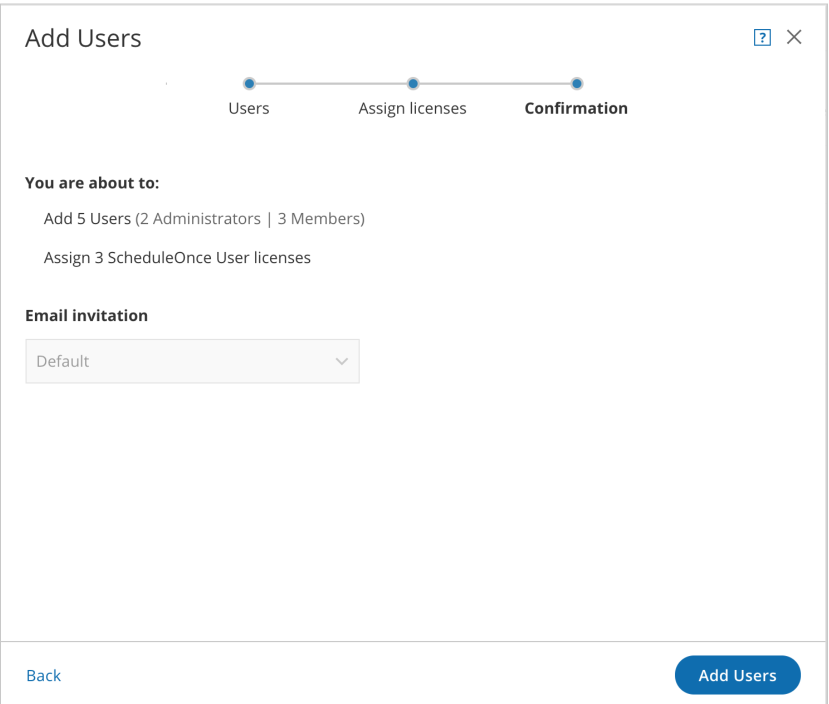


Figure 4: Confirmation

If you've customized an email invitation template in the Notification templates editor, you can select the custom template of your choice in the dropdown. You can either create your own invitation template from scratch, or you can simply tweak the default template by changing the wording a bit, adding a logo and changing anything else you wish to.
If you haven't customized a template, this option will be greyed out and OnceHub will send the invite using the default template.

11. To adjust your Users or their license assignment, click **Back**. If you'd like to proceed with adding the User(s), click **Add Users**.
12. OnceHub sends an email invitation to the invited User(s). When a new User clicks the invitation link in the email, they will be taken to the OnceHub sign-in page where they can set their own password. They must click the invitation link within 24 hours or it will expire. The admin can resend the email invitation by clicking Resend invitation next to the User's name on the Users page. This will reset the 24-hour expiration period.
Learn more about joining the OnceHub organization as a new User

Note:

Whenever you add a new User, OnceHub creates a Booking page for them. In the lefthand icon menu, you can click on the Booking pages icon to configure this further.

Learn more about getting started with Booking pages

Introduction to multi-user scenarios

Last Modified on Jun 2, 2023

OnceHub offers robust solutions for many different multi-user scheduling scenarios. Our flexible modeling approach includes a number of unique features: Resource pools, Master pages, multiple Distribution methods, Panel meetings, and Booking reassignment. By using these features, you can set up a wide range of scheduling scenarios for your team.

Resource pools

Resource pools allow you to dynamically distribute bookings among a group of Team members in the same department, location, or with any other shared characteristic. Each Resource pool has its own method for distributing bookings. As bookings come in, you will be able to monitor how many bookings each Team member receives and ensure an optimal distribution of bookings at any point in time.

Master pages

Master pages allow you to combine multiple Event types, Booking pages, and Resource pools into one page that you can share with your Customers. Master pages can be used to provide a single point of access to different Team members in your organization, or to multiple meeting locations or channels. Bookings made on a Master page can be either automatically assigned to Team members according to rules you define or assigned based on the customer's selection. When you want to automatically assign bookings to Team members, you can create your own rules. Rules can either be Dynamic or Static.

Multiple Distribution methods

OnceHub offers multiple methods for automatically distributing bookings among Team members. Each method offers different advantages. If achieving an equal distribution among Team members is your top priority, you can add a Resource pool with Round robin distribution to your Master page.

Alternatively, if providing maximum availability to customers is your main goal, Pooled availability or Pooled availability with priority can be used. Based on the method you choose, bookings made on your Master page will be automatically distributed among your Team members.

Panel meetings

OnceHub allows you to create Panel meetings that enable Customers to book a time to meet with multiple Team members simultaneously. You can create panels with specific Team members, or dynamic panels that use Resource pools to assign the relevant Team member. When a Customer visits your Master page, they will only see availability for possible panel combinations.

Booking reassignment

OnceHub allows you to reassign bookings from one Team member to another. This is useful if a Team member is sick or if a different Team member is better able to serve a specific Customer. When a booking is reassigned, the relevant Team members are updated. From your Customer's perspective, the event remains as originally scheduled. Customers show up to bookings as planned, and the experience remains intact.

Scheduling one-off meetings using one-time links

Last Modified on Oct 13, 2022

Note:

One-time links are only available for Master pages using team or panel pages.

Master pages allow you to combine multiple Booking pages and Event types into one point of access for your Customers, providing support for a wide range of scheduling scenarios.

With OnceHub, you can generate one-time links, which are good for one booking only, eliminating any chance of unwanted repeat bookings. A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page. One-time links can be personalized, allowing the Customer to pick a time and schedule without having to fill out the Booking form.

For example, you may have a Customer who wants to schedule a Support meeting to resolve a specific issue. However, you want to restrict access to your Support team because their time is limited. You can send this Customer a one-time link to schedule a booking for this specific issue.

After the Customer schedules the booking, they won't be able to use that one-time link to schedule bookings for any other issues.

Requirements

To create a Master page with a team or panel page scenario, you must be a OnceHub Administrator.

Generating a one-time link

To generate a one-time link:

1. In the top navigation menu, click the quick share icon (Figure 1).

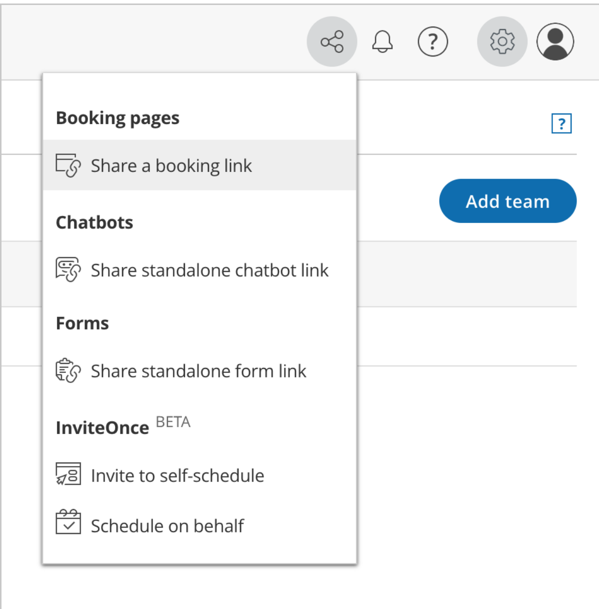


Figure 1: Quick share icon

2. Toggle the **One-time link** option to ON (Figure 2).

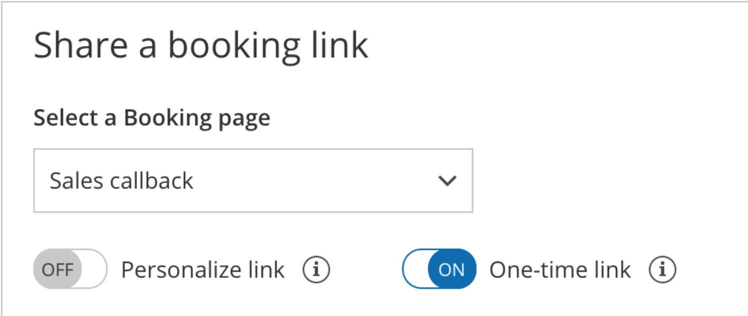


Figure 2: One-time link toggle ON/OFF

You can also generate a one-time link in the **Overview** section of the relevant Master page:

1. Go to **Setup** in the top navigation bar.
2. Select the relevant Master page that you would like to generate a one-time link for.
3. In the Master page Overview section, click **Generate a one-time link** in the **Share & Publish** section (Figure 3).

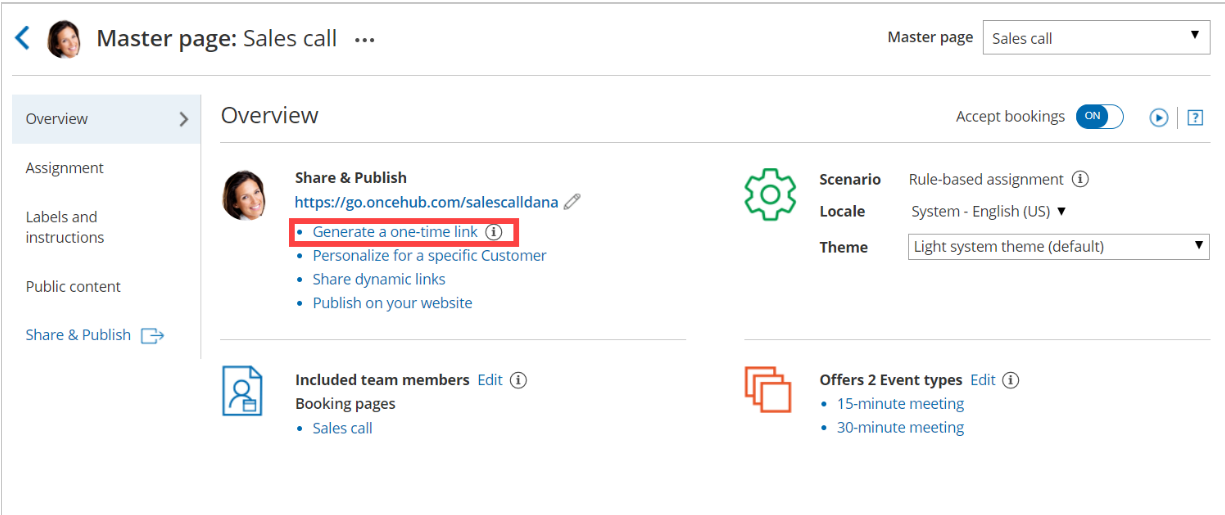


Figure 3: Generating a one-time link in the Master page Share & Publish section

4. The **One-time link** pop-up will open (Figure 4).

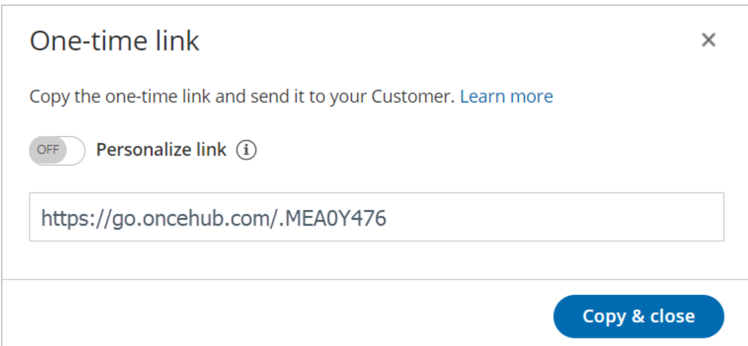


Figure 4: One-time link pop-up

5. Toggle **Personalize link** to ON if you would like to personalize the one-time link for a Customer (Figure 3). Enter a **Customer name** and **Customer email**.

> **Note:**
>
> When you personalize a one-time link, the Booking form step will be skipped. Skipping the Booking form step allows for a quicker booking process for your Customers.

You can choose to show the Booking form by changing the **Skip** URL parameter to "&skip=0". Learn more about using URL parameters

6. Click **Copy & close** to copy the one-time link to your clipboard and close the pop-up. You can then paste the one-time link into an email or instant message and send it to your Customer.

Generating a one-time link for an individual Booking page

You can use the following workaround if you need to generate a one-time link for an individual Booking page.

1. Create a new Master page with the team or panel page scenario.
2. Go to the **Event types and assignment** section of the Master page.
3. Click **Add Event type** (Figure 5).

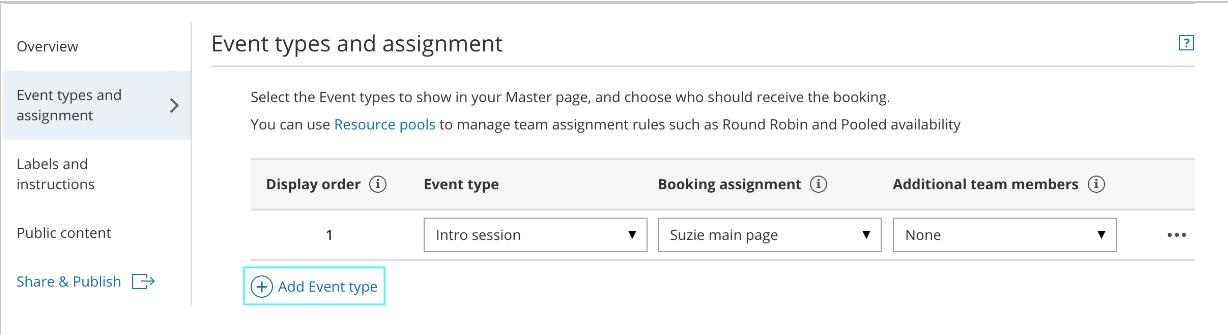


Figure 5: Add Event type

4. Select which Event types will be offered on your Master page. Master pages with team or panel pages can only include Event types configured to Automatic booking and Single sessions. Learn more about conflicting settings when using team or panel pages
5. Next, use the Booking assignment drop-down to select the specific Booking page that you would like to create a one-time link for. Select this Booking page for each Event-based rule you have created.
6. Click **Save**.
7. Access the quick share icon or go back to the Master page **Overview** section and generate a one-time link.

Using OnceHub for room and resource scheduling with team or panel pages

Last Modified on Jun 8, 2023

In this article, you'll learn about the recommended setup for booking resources such as rooms directly, where the resource is the entity that is being booked.

If you need to accept appointments and also reserve a resource, see the following articles:

- Booking conditional on the availability of a single resource
- Booking conditional on the availability of multiple resources

Steps to set up scheduling for rooms and resources:

Important:

Resource scheduling can be done with Outlook Calendar or Google Calendar in your connected calendar, or with organizational resource calendars.

Learn more about using Exchange resource calendars

Learn more about using G Suite resource calendars

1. If you are not using organizational resource calendars, create a calendar for each resource. All resource calendars can be created in your calendar as sub calendars.
2. In Booking pages, go to **Setup** and create a Booking page for each resource.
3. In the Associated calendars section of each Booking page, select the resource's calendar as the calendar in which bookings are created and as the calendar that busy time is retrieved from.
4. In the Booking page Public content section, you can add tags for each resource. This will allow Customers to filter the resource list by tag properties. This additional filter enables Customers to quickly and efficiently find the appropriate resource and make a booking.
5. At this point, you need to decide between two approaches: you can either use Booking pages only, or you can use Booking pages and Event types. Event types can be used to specify the booking duration, and enable you to use Payment integration, which you can use to collect payment every time the resource is booked. A different price can be set for each Event type specifying the different booking durations. Learn more about using multiple Event types
    - If you choose to use Booking pages only, all settings are on the Booking page. If you choose to use Event types for duration, the Scheduling options, Time slot settings, Customer notifications, Booking form and redirect and Payment and cancel/reschedule policy sections will be on each Event type. Learn more about Event types
    - If you want to work in Automatic booking mode, people will select a single time and the reservation will be made. You can also work in Booking with approval mode, in which case you will have to approve each reservation before it's created.
6. Once you're done with the settings, create a Master page. If you want resources to be automatically assigned to bookings, select Team or panel page in the **New Master page** pop-up (Figure 1).

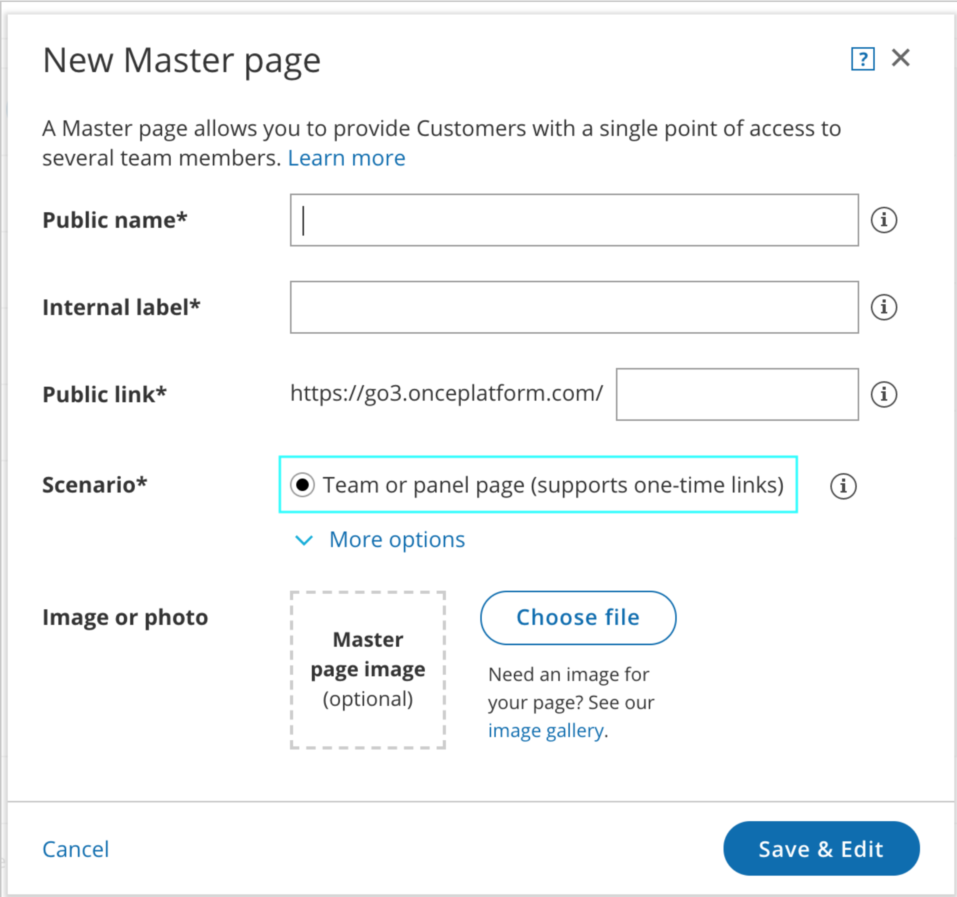


Figure 1: New Master page pop-up

7. Go to the Event types and assignment section.

> **Tip:**
>
> When you use a team or panel page, you can generate one-time links which are good for one booking only.
>
> One-time links eliminate any chance of unwanted repeat bookings. A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page. One-time links can be personalized, allowing the Customer to pick a time and schedule without having to fill out the Booking form.

8. Add one or more Event types.
9. Select the Event types that you want to offer in your Master page.
10. Select Booking pages or Resource pools to provide your Event types.
11. In the Labels and instructions section, define the Public labels. In the Public content section, provide details which your Customers see when they book with you.

You're all set! To test your Master page, go to the Master page Overview and make a test booking by using the public link in the **Share & Publish** section.

Booking conditional on the availability of a single resource

Last Modified on Oct 13, 2022

This article explains the setup for booking conditional on the availability of a single resource. If you need to book appointments conditional on the availability of multiple resources, see the Booking conditional on the availability of multiple resources article.

There are many situations where bookings should be conditional on the availability of a single resource, like a specific conference room. In this case, you can create Panel meetings to allow Customers to book a time with both the User and the resource. Time slots will only be offered when both the User and the resource are available.

How to set up

1. Create an Event type for your meeting. You will need to use at least one Event type to ensure common settings between the User and resource. If you only have one Event type, name it with the subject of your meeting.
2. Create two Booking pages: one for the User and a second one for the resource.
3. Create a Master page.
4. Select Team or panel page as the Master page scenario.
5. Go to the **Event types and assignment** section of the Master page.
6. Click **Add Event type**.
7. Select the Event types that you want to offer in your Master page.
8. Under Booking assignment, choose the User's Booking page. The Primary team member owns the calendar event and determines the settings of the meeting, including the location, the booking form, the post-scheduling flow, notifications, and third-party integrations.
9. Under Additional team members, select the Booking page you created for your resource. If the Primary team member is connected to a calendar, the resource will be added as a guest to the calendar event and be cc'ed on all notifications.
10. Click **Save.**
11. Go to the Label and instructions section of the Master page. Here you can define the **Public labels** and **Selection instructions** for your Master page. You should define what a Panel member represents here.
12. Click **Save**.
13. Go to the Public content section of the Master page and define the information that Customers will see when they visit your Master page.

You're all set! When Customers visit your Master page, they will only see time slots when the User and resource are available.

Tip:

When you use a Master page using Team or panel pages, you can generate one-time links which are good for one booking only.

One-time links eliminate any chance of unwanted repeat bookings. A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page. One-time links can be personalized, allowing the Customer to pick a time and schedule without having to fill out the Booking form.

Learn more about using one-time links

Booking conditional on the availability of one of several resources

Last Modified on Oct 13, 2022

There are many situations where booking should be conditional on the availability of multiple resources, such as when you have multiple conference rooms available in your office and need an available room automatically assigned when someone books a meeting. See the Meeting resources page

In this case, you can create Panel meetings to allow Customers to book a time with both the User and a resource. Time slots will only be offered when both the User and a resource are available.

How to set up

1. Create an Event type for your meeting. You will need to use at least one Event type to ensure common settings between the User and resource. If you only have once Event type, name it the subject of your meeting.
2. Create Booking pages for your User and for each of the resources. For example, if you have four conference rooms, create a Booking page for each.
3. In the left sidebar, click on **Resource pools** under the **Tools** section.
4. Click **Add a Resource pool** to create a new Resource pool.
5. Name your Resource pool.
6. In the **Distribution method** section, select Pooled availability.
7. Select a Reporting cycle.
8. Click **Save & Edit**. You'll be redirected to the Resource pool Overview section.
9. Click on your new Resource pool and navigate to the **Resources** section. Use the drop-down menu to select the Booking pages you created for each of your resources.
10. Create a Master page.
11. Select Team or panel page as the Master page scenario.
12. Go to the Event types and assignment section of the Master page.
13. Click **Add Event type**.
14. Select the Event types that you want to offer in your Master page.
15. Under Booking assignment, choose the User's Booking page. The Booking assignment determines who owns the calendar event and the settings of the meeting, including the location, the booking form, the post-scheduling flow, notifications and third-party integrations.
16. Under Additional team members, select the Resource pool you previously created.
17. Click **Save.**
18. Go to the Label and instructions section of your Master page. Here you can define the **Public labels** and **Selection instructions** for your Master page. You should define what a Panel member represents.
19. Click **Save**.
20. Go to the Public content section of your Master page and define the information that Customers will see when they visit your Master page.

You are all set! When Customers visit your Master page, they will only see time slots when the User and at least one of the resources are available. Once the Customer selects a time, the booking will be automatically assigned to a resource.

Tip:

When you use a Master page using team or panel pages, you can generate one-time links which are good for one booking only.

One-time links eliminate any chance of unwanted repeat bookings. A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page. One-time links can be personalized, allowing the Customer to pick a time and schedule without having to fill out the Booking form.

Learn more about using one-time links

Multiple Team members accepting appointments with Event types using team or panel pages

Last Modified on Oct 13, 2022

You can accept bookings for multiple Team members with multiple Event types. Team members can be accessed via one Master page, or independently through their individual Booking pages. Learn more about User management

Bookings made on a Master page can be either automatically assigned to Team members according to rules you define, or assigned based on the Customer's selection. In this article, we will talk about team and panel pages.

Requirements

You must be a OnceHub Administrator to set up this scenario.

How to set up

1. Create the Event types you require. If you want to work in Automatic booking mode, make sure to select it in the Scheduling options section of each Event type. You can also work in Booking with approval mode.

   > **Note::**
   >
   > If you want to automatically assign bookings, you must use Automatic booking mode.

2. Click on your profile image or initials in the top right corner, select **Profile settings**, and go to the **Users** page.
3. Create a User account for each Team member.
4. You can create a Booking page for each Team member and make the Team member the Owner of the page. Alternatively, you can leave it to the Team members to create their own Booking pages.
5. Once you're done with the settings, create a Master page. Select Team or panel page in the **New Master page** pop-up (Figure 1).

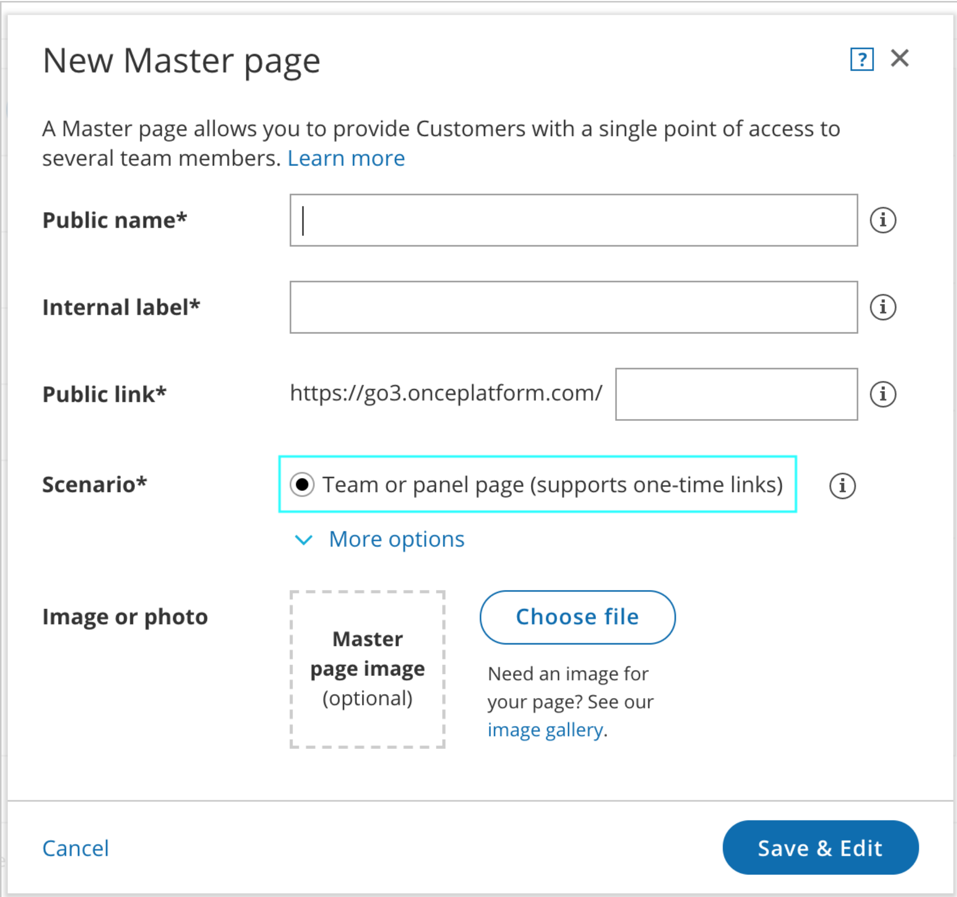


Figure 1: New Master page pop-up

6. Click **Save & Edit**.
7. You'll be redirected to the Master page Overview section. This section gives you a summary of your Master page's main properties. Here you can edit the Master page's **Theme** and **Locale**, as well as access its **Share & Publish** options.
8. Go to the Event types and assignment section. This is where you create rules to determine how bookings will be assigned to Booking pages.
9. Customize the page's Labels and instructions and Public content.

You're all set! To test your Master page, go to the Master page Overview and make a test booking by using the public link in the **Share & Publish** section.

Tip:

When you use a Master page using team or panel pages, you can generate one-time links which are good for one booking only.

One-time links eliminate any chance of unwanted repeat bookings. A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page. One-time links can be personalized, allowing the Customer to pick a time and schedule without having to fill out the Booking form.

Learn more about using one-time links

Introduction to single-user scenarios

Last Modified on Jun 2, 2023

OnceHub allows you to offer multiple meeting types on your Booking page or Master page. There are three ways to offer multiple meeting types using Event types, Booking pages, and Master pages.

Accept appointments for yourself

If you accept appointments for yourself, Customers come to your Booking page and book appointments with you automatically or with your approval. If you offer only one meeting type, you can use an Event type and link it to your Booking page.

For example, let's say you offer a 60-minute tax return preparation session for a fee of $100. Create an Event type, customize the settings to meet your requirements, and associate it with a Booking page.

Learn more about configuring your Event type

Offer different appointment types on your Booking page

If you offer multiple meeting types which all have the same availability and same location, then all you need is one Booking page with multiple Event types linked to it. Each Event type can be a different meeting type with its own settings. You can configure the Scheduling options, Time slots, Booking form, Customer notifications and the Payment and Cancel/Reschedule policies for each Event type.

For example, you might offer a 15-minute introductory session for free, a 30-minute online consultation session for $50 with a lenient reschedule/cancellation policy, and an hour long face-to-face consultation for $100 with a strict reschedule/cancellation policy. This is possible using multiple Event types with different configurations on your Booking page.

Learn more about offering different appointment types

Use both Event types and multiple Booking pages together

Event types and Booking pages can be used together to meet a wide range of scheduling scenarios for offering Event types at different locations or at specific hours or days.

For example, let's say you're providing Event types in three locations and you're in different locations during different days of the week. Define the Event types that you provide and set each Booking page to be a location. You can set up your scheduling process so that Users will first select an Event type and then a location, or vice versa. In this specific scenario, you'll create the Booking pages and the Event types, link the Event types to the Booking pages, and then link the Booking pages to a Master page.

Learn more about supporting different locations and times for your meetings

Accepting appointments for yourself using Event types

Last Modified on Oct 13, 2022

When you accept appointments for yourself, people come to your Booking page and book appointments with you automatically or with your approval.

If your Booking page is associated with Event types, take the following steps to customize your Event type for personal appointment scheduling. Remember to click the **Save** button after each step.

1. Select the relevant Event type.
2. Click Scheduling options. Select your preferred mode between Automatic booking or Booking with approval.
3. Click Time slot settings. Set your preferred duration, Time slot display, Workload rules, Timeframe rules, and other settings related to time slots.
4. Click Booking form and redirect.Select the Booking form that will be used to gather valuable information when your Customers book online.
5. Click Customer notifications. Select which notifications your Customers will receive and by which delivery method (email or SMS).
6. Click Payment and cancel/reschedule policy. Select a **Payment and pricing** option and choose your cancellation and reschedule policies.
7. Click Public content and update the event information.
8. Review the rest of the Booking page settings for final adjustments.

You can create a quick test booking by going to the Booking page associated with this Event type. In the Overview section, use the public booking link in the **Share & Publish** section to make sure that everything is exactly as you want it.

Offering different appointment types on your Booking page

Last Modified on Oct 13, 2022

If you offer multiple meeting types which all have the same availability and same location, you can set up one Booking page with multiple Event types linked to it. Follow these steps to offer different appointment types on your Booking page.

1. Create the Event types you need and define the settings for each Event type.
2. In the settings for the relevant Booking page, go to the **Event types** section and add your Event types to your Booking page (Figure 1).

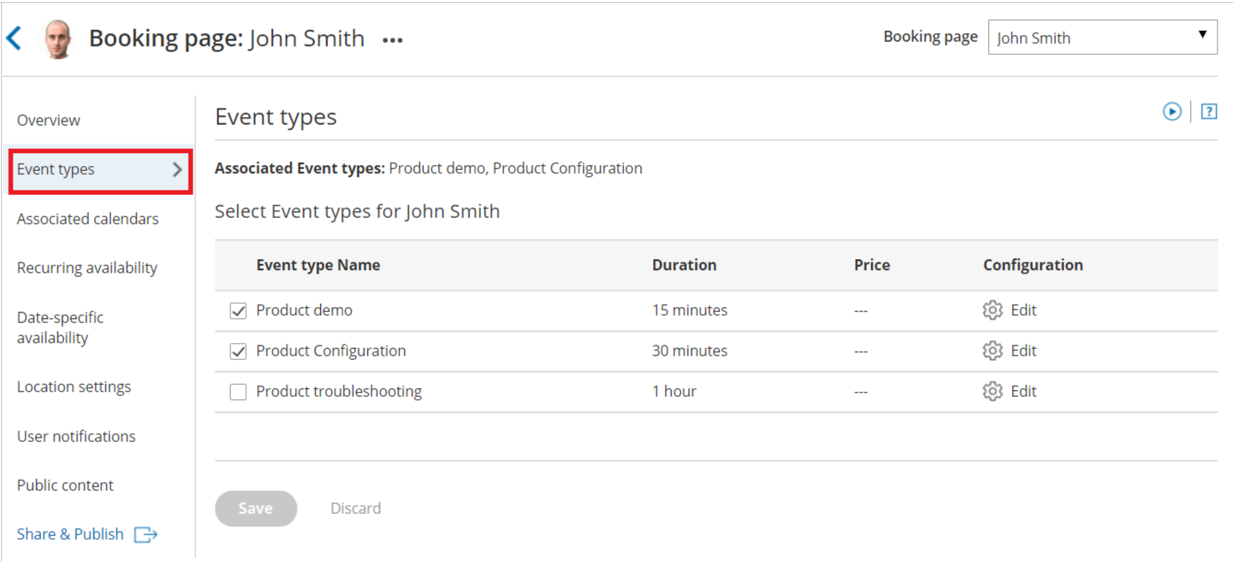


Figure 1: Event types section of the Booking page

3. Click **Save**.

> **Note :**
>
> The Scheduling options, Time slots, Booking form, Customer notifications and Cancel/reschedule sections will move from your Booking page and are now located on your Event types.

To test your Booking page with Event types, go to the Booking page Overview and make a test booking by using the public link in the **Share & Publish** section.

Using a Master page

If you would like to have more control over text and labels seen by your Customers, you can use a Master page. This provides you with more flexibility to customize the selection instructions and the public labels.

1. Create a new Master page and add your personal details in the Public content section.
2. In the Assignment section, add your Booking pages to the Master page.
3. In the Labels and instructions section, customize the public labels and selection instructions.

To test your Master page, go to the Master page Overview and make a test booking by using the public link in the **Share & Publish** section.

> **Tip:**

If you would like to generate one-time links which are good for one booking only, you should use a Master page using Rule-based assignment with Dynamic rules.

One-time links eliminate any chance of unwanted repeat bookings. A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page. One-time links can be personalized, allowing the Customer to pick a time and schedule without having to fill out the Booking form.

Learn more about using one-time links

Supporting different locations or times

Last Modified on Jan 11, 2021

Event types and Booking pages can be used together to meet a wide range of scheduling scenarios for offering Event types at different locations, channels, or at specific hours or days.

Example:
You offer 2 Event types: Event type 1 and Event type 2. On Mondays and Tuesdays, you are at Location A, and on Wednesday through Friday at Location B.

Two Booking pages can be created, with the following services added:
go.oncehub.com/LocationA – Event type 1, Event type 2
go.oncehub.com/LocationB – Event type 1, Event type 2

Now, you can create a Master page where a Customer can choose a particular Event type, and then be shown a list of Booking pages showing locations where that Event type is offered or vice versa. Once an Event type and location is chosen, the meeting can be scheduled only at times when that particular Event type is offered at the desired location.

Follow these steps to create multiple meeting types with Event types and Booking pages:

1. Create the Event types as explained in the Using Event types for multiple meeting types article.
2. Create the Booking pages as explained in the Using Booking pages for multiple meeting types article.
3. Go to each Booking page and add the relevant Event type in the **Event types** section.
4. Create a new Master page.
5. Add your personal details in the **Public content** section.
6. In the Master page Overview, add the Booking pages to the Master page and customize the scheduling process, selection text and labels.

To test your Master page, go to the Master page Overview and make a test booking by using the public link in the **Share & Publish** section.

Introduction to multiple attendee scenarios

Last Modified on Apr 17, 2023

In addition to the default one-on-one format, OnceHub supports several multiple attendee meeting formats. For meetings with multiple attendees, invites can be sent to several Team members on your side (the organization), several Customers, or both.

Meetings with multiple Customers

You can invite multiple Customers to a specific meeting via a few distinct features, depending on your business scenario:

- **Customer guests** - Only one Customer makes the booking for each time slot, and is allowed to invite additional guests. This is useful when meeting with several colleagues on your Customer's side, or with a couple for a coaching, counseling or advising session. In all cases, the single Customer that makes the booking will invite the guests as well. Learn more about Customer guests
- **Group session** - A number of unrelated Customers can book the same time slot. The number of Customers can be specified, for a class or a workshop, or unlimited for a webinar signup. Learn more about Group sessions

Meetings with multiple Team members

Meetings can be scheduled with multiple Users via the following features, depending on your business scenario:

- **Team Booking pages (Panel meetings)** - This is useful when multiple Team members must attend from your side, and booking is conditional on their simultaneous availability. Use Panel meetings when each of the specified Team members is required for the meeting. Learn more about team Booking pages (Panel meetings)
- **Optional attendees** - This is useful when additional Users on your team should be informed about bookings, but not added as required attendees. The additional Users should subscribe to meeting notifications, or have the meetings added to their calendars as an additional booking calendar, without taking their busy time. Using either method, the optional attendees will be made aware of each booking, without the booking being conditional on their availability.

Using Group sessions (number of bookings per slot) with a connected calendar

Last Modified on Jun 2, 2023

Important:

OnceHub recommends working with a connected calendar. Learn more about the differences between working with a connected calendar vs. working without a connected calendar

Group sessions allow you to offer the same time slot to multiple Customers, with a set quota for how many are allowed to book that exact time slot. You can use Group sessions for lectures, webinars, or other events where more than one Customer signs up for the same time. See a demo

One-on-one or Group session options are set up in the **Scheduling options** section of the Booking page.

Note:

If you have linked your Booking page to at least one Event type, the Scheduling options will be on the Event type and not on the Booking page.

Booking Pages provides three options to control the number of bookings per time slot:

One-on-one session: In this mode, the slot becomes unavailable as soon as a booking is made. This is the default setting.

Group session - multiple bookings per slot: You can specify the number of bookings that can be made before the slot becomes unavailable. This mode is used to accept bookings for activities that serve more than one Customer at a time like classes, tours and many types of group sessions.

Group session - unlimited bookings per slot: In this mode, there is no limit on the number of bookings per slot. This mode will never block availability. Unlimited bookings per slot is used for webinars and online classes where there is no physical limitation on capacity.

When using OnceHub **with** a connected calendar, the following rules apply.

Rules for One-on-one sessions

1. Busy time from any selected calendar closes the slot, regardless of whether it was added via the Booking page or directly to the calendar.
2. Calendar events with a status of 'Free' or 'Available' will not block the slot.
3. Each booking can be canceled or rescheduled by the Customer or the Owner. This will automatically free up the slot so that a new booking can be made.

Rules for Group sessions - multiple bookings per slot

1. Multiple bookings per slot applies to the main booking calendar only. Any busy time that is retrieved from additional calendars will block the slot regardless of the slot's capacity.
2. Each busy time in the main booking calendar will be counted as one booking towards the capacity defined in the Booking page or Event type regardless if it was added via the Booking page or directly to the calendar. For

example, if a Booking page is set to accept two bookings per slot, one booking can be created via the Booking page and another booking can be created directly in the main booking calendar and will close the slot.

3. Calendar events that have a status of 'Free' or 'Available' will not be counted towards the defined capacity.
4. Each booking creates its own calendar event in the main booking calendar. For example, if there are three bookings per slot, the calendar events will be created next to each other on the calendar grid.
5. Each booking can be canceled or rescheduled by the Customer or the Owner. This will automatically free up the slot so that a new booking can be made.

Rules for Group sessions - unlimited bookings per slot

1. Unlimited bookings per slot applies to the main booking calendar only. Busy time that is taken from additional calendars will close the slot, regardless of its unlimited capacity.
2. Each booking creates its own calendar event in the main booking calendar. For example, if there are three bookings per slot, the calendar events will be created next to each other on the calendar grid.
3. Each booking can be canceled or rescheduled by the Customer or the User. This will not affect the slot's capacity, as it is unlimited.

Using OnceHub to accept bookings for classes

Last Modified on Jun 2, 2023

OnceHub can be used to accept bookings for a class, workshop, or other type of Group sessions in which a maximum number of people are allowed to attend.

In this article, we will configure Booking pages for a virtual class.

When your OnceHub account is connected to Zoom, Microsoft Teams, GoToMeeting, or Webex Meetings, the virtual class meeting will be automatically created and scheduled in a single action.

1. Create a new Booking page for accepting bookings for the virtual class.
2. In the **Recurring availability** section, erase recurring availability on the calendar.
3. Next, go to the **Date-specific availability** section to mark the time/times for the class on the calendar.
4. In the **Scheduling options** section, set the Group session option to "Unlimited," or to a defined capacity, if you want to limit the number of participants.
5. Complete the rest of the Booking page settings.
6. If you want to list multiple classes, you can create a Booking page for each class and then group them under a Master page.

Using OnceHub to schedule bookings for webinars

Last Modified on Jun 2, 2023

Accepting bookings for webinars is a common use case. Here are specific instructions for creating the desired configuration:

You can use the OnceHub connectors for Zoom, Google Meet, Microsoft Teams, GoToMeeting, and Webex Meetings to set up and schedule webinars in one step.

1. Create a new Booking page for accepting bookings for the webinar.
2. In the **Recurring availability** section, erase recurring availability and save.
3. Then go to the **Date-specific availability** section to mark the time/times for the webinar.
4. In the **Scheduling options** section, set the Group session option to "Unlimited," or to a defined capacity, if you want to limit the number of participants.
5. Complete the rest of the Booking page settings.
6. If you want to list multiple webinars, you can create a Booking page for each webinar and then group them under a Master page.

Transitioning from face-to-face to virtual meetings

Last Modified on Jun 2, 2023

In this article, you'll learn how to transition from offering face-to-face meetings to offering virtual meetings.

Use our native video conferencing integration

OnceHub seamlessly integrates your booking activities with Zoom, Google Meet, Microsoft Teams, GoToMeeting, or Webex Meetings through all phases of the booking lifecycle. Video conferencing details are included in all OnceHub notifications, with built-in support for cancellations and rescheduling.

Each booking includes a unique link for joining the video meeting and, if configured, its own meeting password (always recommended, to secure your meeting from unexpected visitors).

If you've been using OnceHub to book face-to-face meetings and would like to switch to video meetings instead, the steps are simple:

Step one: Connect to video conferencing

1. Sign into your OnceHub account.
2. In the top right-hand corner, select your profile picture or initials in the top right-hand corner → **Profile settings** → **Video conferencing**.
3. You'll see options for connecting with Zoom, Google Meet, GoToMeeting, or Webex Meetings. Connect your account.

Learn more about connecting to:

- Zoom
- Google Meet
- Microsoft Teams
- GoToMeeting
- Webex Meetings

Step two: Configure your Booking page(s) to use video conferencing

Every Booking page can offer a different location, whether virtual or physical.

1. Hover over the lefthand menu and go to the Booking pages icon → relevant Booking page → **Conferencing / Location**.
2. In the **Meeting channel** step, select **Virtual meeting: Video conferencing or phone call**.
3. In the **Who provides conferencing information?** step, select **Conferencing information is provided by the Owner (you)**.
4. In the **Edit conferencing information** step, select the relevant video call option (Zoom, GoToMeeting, or Webex Meetings).
5. The OnceHub connector provides direct access to your meeting settings, allowing you to set audio, password, and other options.
6. Click **Save**.

You're all set!

When a booking is made, video conferencing session details are integrated with all OnceHub notifications and a video conferencing session for Zoom, GoToMeeting, or Webex Meetings will be created automatically.

Your customer will receive all connection details in the scheduling confirmation email and calendar invite.

Using a different video conferencing app

If you don't use one of the video conferencing options we support natively, you have a couple options:

Connect to Zapier

You may be able to automate a Zap through our native Zapier integration with the following apps:

- ClickMeeting
- Intermedia AnyMeeting
- 24Sessions
- Flow App
- Intellinote
- join.me
- SproutVideo
- Daily.co

See Zapier's video call category for the latest updates on which apps they support.

Learn more about the OnceHub connector for Zapier

For assistance on connecting to Zapier and configuring your Zap(s), we offer a Zapier onboarding webinar that takes you through each step. See all onboarding webinars

Use your own video conferencing information

Our Location section allows you to configure your Booking page with your own video conferencing information. This is relevant if you use a static link; for instance, www.myvideoapp.com/mylink.

However, please keep in mind that **using your own static link is less secure than our native integrations**, as it won't create a unique link for each individual meeting or set a meeting password, two settings highly recommended to secure your meetings from unexpected visitors.

To configure your own video conferencing information:

1. Hover over the lefthand menu and go to the Booking pages icon → relevant Booking page → **Conferencing / Location**.
2. In the **Meeting channel** step, select **Virtual meeting: Video conferencing or phone call**.
3. In the **Who provides conferencing information?** step, select **Conferencing information is provided by the Owner (you)**.
4. In the **Edit conferencing information** step, you should enter the details that the Customer needs in order to connect to the video meeting.
5. Click **Save**.

When someone makes a booking, they will be notified that this is a virtual meeting and they will receive all connection details in the scheduling confirmation email and calendar invite.

Offer phone meetings

Depending on your customer base, you may want to offer the most traditional virtual meeting of all: phone meetings.

If you want to switch from face-to-face meetings to phone meetings, this is easy to configure.

1. Hover over the lefthand menu and go to the Booking pages icon → relevant Booking page → **Conferencing / Location**.
2. In the **Meeting channel** step, select **Virtual meeting: Video conferencing or phone call**.
3. In the **Who provides conferencing information?** step, select **Conferencing information is provided by the Customer**.
4. In the **Edit conferencing information** step, you should adjust the default text to something like, "This is a phone meeting."
5. In the **Conferencing information label** step, switch the default text to, "Phone number."
6. Click **Save**.

You're done! They will be asked for their phone number when they provide their information while making a booking.

If you have any questions on setting up virtual meetings, please don't hesitate to contact us.

Affinity FAQ

Last Modified on Jun 2, 2023

This article includes the most frequently asked questions related to the OnceHub vendor affinity program.

I want to connect OnceHub and Redtail. What are my options?

OnceHub can pass information to Redtail in two ways:

1. Use the Redtail Retriever to sync information between your Outlook Calendar and the Redtail Calendar.

2. Pass information from OnceHub to Redtail by using Zapier.

Can my assistant manage the account?

You can add a User license for them and make sure they have Editor access to each relevant Booking page. If you'd like, they can also subscribe to booking notifications.

Every OnceHub account includes the first three User licenses, with additional licenses available for purchase.

Can we schedule appointments on behalf of the client?

You can do this by going to your own Booking page and filling out the necessary information on behalf of your client.

All you will need are their name and email address to complete the booking, as well as any other information that you have made mandatory on your Booking form.

Some people create a separate, internal Booking page with a wider range of availability and use that when booking on behalf of their clients.

Learn more about scheduling on behalf of your client

How does OnceHub handle an advisor who has multiple physical locations?

If you offer appointments in multiple locations, you can use multiple Booking pages to represent the locations and configure each Booking page with its own availability and settings.

For example, on Mondays and Tuesdays, you are at Location A, and on Wednesdays and Thursdays, you are at Location B. You can use a Master page to combine multiple Booking pages into one page that you can share with your customers.

Learn more about using multiple locations

Using Booking pages for multiple meeting types

Last Modified on Jun 20, 2019

Tip:

We recommend associating your Booking page with at least one Event type. This enables better modeling of advanced scheduling scenarios (such as multi-User scenarios using Pooled availability) and provides a better scheduling experience for your Customers.

Learn more about supporting multiple meeting types using Event types

Different types of meetings can have different characteristics such as availability, duration, lead time, time zone, and more. For example, you might have face-to-face meetings on Monday, Tuesday and Wednesday, and phone meetings on Thursday and Friday. Face-to-face meetings could be longer and also need a buffer for travel time.

In this scenario, you could create two separate Booking pages: One for face-to-face meetings, and one for phone meetings. Each Booking page can have its own specific configuration. You could then use a Master page to combine the two Booking pages into one page that you can share with your Customers.

How to set up multiple meeting types with Booking pages

1. Create a Booking page for each meeting type. Each Booking page can have completely different availability and settings according to the characteristics of each meeting type.
2. Configure each Booking page. For example, one Booking page can have time zones enabled and work in Automatic booking mode, and the other page can have time zones disabled and work in Booking with approval mode.
3. Create a Master page and add your profile information to the **New Master page** pop-up.
4. Select the Booking pages to include in your Master page and customize the labels and selection text.

To test your Master page, go to the Master page Overview and make a test booking by using the public link in the **Share & Publish** section.

Accepting appointments for yourself without Event types

Last Modified on Oct 13, 2022

Tip:

We recommend associating your Booking page with at least one Event type. This enables better modeling of advanced scheduling scenarios (e.g. multi-User scenarios using Pooled availability) and provides a better scheduling experience for your Customers.

Learn more about accepting appointments for yourself using Event types

When accepting appointments for yourself, people come to your Booking page and book appointments with you automatically or with your approval. When your Booking Page is not associated with Event types, take the following steps to customize your Booking page for personal appointment scheduling.

1. Hover over the lefthand menu and go to the Booking pages icon → relevant Booking page → **Scheduling options**, and select which booking mode you prefer: Automatic booking or Booking with approval.
2. Under **Time slot settings**, select the duration, **Time slot display**, **Workload rules**, **Timeframe rules**, and other settings related to time slots.
3. Under **Recurring availability** and **Date-specific availability**, adjust your availability using Weekly recurring only, Date-specific only, or Weekly recurring plus Date-specific exceptions.
4. Under **Associated calendars**, assign a calendar and adjust your settings. Make sure that bookings are created in the calendar that you want, and that busy time is also retrieved from the correct calendars.
5. Under **Conferencing / Location**, set the appropriate location for your booking, as well as the contact information either you or your Customer must provide.
6. Under **Booking form and redirect**, select the Booking form that will be used to gather valuable information when your Customers are booking online.
7. Under **Customer notifications**, decide which notifications your Customers will receive and by which delivery method (email or SMS).
8. Under **User notifications**, decide which notifications you and your stakeholders will receive and by which delivery method (email or SMS).
9. Under **Public content**, update your personal information.

Run through a quick test meeting by clicking on your Public link in the **Share & Publish** section of your Booking page **Overview** to make sure that everything is exactly as you want it.

Scheduling meetings at multiple locations

Last Modified on Oct 13, 2022

Tip:

We recommend associating your Booking page with at least one Event type. This enables better modeling of advanced scheduling scenarios (such as multi-User scenarios using Pooled availability) and provides a better scheduling experience for your Customers. Learn more about supporting multiple meeting types using Event types

If you offer appointments in multiple locations, you can use multiple Booking pages to represent the locations and configure each Booking page with its own availability and settings. For example, on Mondays and Tuesdays, you are at Location A, and on Wednesdays and Thursdays, you are at Location B. You can use a Master page to combine multiple Booking pages into one page that you can share with your customers.

How to set up multiple locations with Booking pages

1. Create a Booking page for each location. Each Booking page can have completely different availability and settings according to the characteristics of each location.
2. Hover over the lefthand menu and go to the Booking pages icon → relevant Booking page → **Conferencing / Location**, configure each Booking page according to the required settings for each location.
3. Create a Master page and add your profile information to the **New Master page** pop-up.
4. Select the Booking pages to include in your Master page and customize the labels and selection text.

To test your Master page, go to the Master page Overview and make a test booking by using the public link in the **Share & Publish** section.

To experience a live demo of multiple locations, please check the multiple locations page.

Tip:

If you would like to generate one-time links which are good for one booking only, you should use a Master page using team or panel pages.

One-time links eliminate any chance of unwanted repeat bookings. A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page. One-time links can be personalized, allowing the Customer to pick a time and schedule without having to fill out the Booking form.

Learn more about using one-time links

Scheduling meetings for a business trip

Last Modified on Oct 13, 2022

OnceHub provides time zone support, as well as solutions for multiple locations with varied availability. These features can be used for scheduling business trip meetings.

Let's say you're a New York (Eastern time, GMT-5) resident planning a business trip to Frankfurt, Germany (Central European time, GMT+1). The business trip scheduling process can be set as follows:

1. Create a Booking page for the business trip. This allows you to share a unique customer link with prospects and associates in Germany, so that they will clearly see when you plan to be in the region. It also prevents clients in the USA from booking face-to-face time with you during the business trip.
2. In the **Event types** section of the **New Booking page** popup, delete all Event types.
3. In the Overview of the Booking page (**Setup ->** relevant Booking page -> Overview), edit the Time zone settings. Click **Edit**, set the time zone to "**Germany; Berlin, Bonn, Frankfurt (GMT+1)**" and press **Save**.
4. Then go to the Recurring availability section. Delete it completely so it is a blank grid and click **Save**.
5. Next go to the Date-specific availability section, highlight the times you will be available for meetings in Frankfurt, and click **Save**. This availability should be entered in the local Frankfurt time zone as this is the time zone of the page.
6. Your calendar account that's connected to OnceHub is set to the New York time zone. When a booking is made via the Frankfurt booking page, you will see all Frankfurt meetings adjusted to your calendar account's default time zone. This means that an appointment booked for 9 am in Frankfurt will appear on the default New York calendar at 3 am. When you arrive in Frankfurt, your calendar account settings should be changed to GMT+1, and the calendar event will adjust to show the meeting at 9 am, as scheduled.
7. if you want to create a clear separation between the trip meetings and all other meetings in your calendar, you can create a new calendar in your connected calendar account and name it something like "Frankfurt meetings." You can then go to to the Associated calendars section (hover over the lefthand menu and go to the Booking pages icon → relevant Booking page → **Associated calendars**), and select the Frankfurt meetings calendar as this Booking page's **Main booking calendar**.
8. Adjust the remaining Booking page settings to your preferences. In the **Conferencing / Location** section, you may want to list a hotel or temporary office location, or ask the customer to supply an address for the meeting.
9. You can choose to share this Booking page's customer link only with prospects or customers in Germany, or you can add it to a Master page, offering it alongside your other Booking pages.

Tip:

If you would like to generate one-time links which are good for one booking only, you should use a Master page using team or panel pages.

One-time links eliminate any chance of unwanted repeat bookings. A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page. One-time links can be personalized, allowing the Customer to pick a time and schedule without having to fill out the Booking form.

Learn more about using one-time links

Using ScheduleOnce to schedule for conferences, trade shows and other events

Last Modified on Jun 19, 2019

ScheduleOnce is used by many event organizers to facilitate meetings between hosts and attendees at conferences, trade shows and many other events.

The solution described here is managed by the event organizer only—hosts or attendees do not need to be involved. The event organizer creates the scheduling pages and attendees use these pages to schedule their meetings. When scheduling is completed, the event organizer can hand the schedules to each participant so they know when and with whom they will be meeting. See a live demo

In this scenario, it is recommended that you use ScheduleOnce without a connected calendar because there is no need to factor in busy time from other events that are not related to the scheduled conference or trade show.

Tip:

If you have more complex scheduling requirements, such as the need to automatically reserve a room for each meeting, we recommend that you **work with a connected calendar**. This will provide greater flexibility and additional features. For example, learn about making booking conditional on the availability of a single resource**.**

How to set up the scheduling page

1. Create a Booking page for each host.
2. In the **Scheduling options** section of each Booking page, set it to Automatic booking mode (recommended). You can also work in Booking with approval mode, in which case you will have to approve each appointment before it is created in the Activity stream (this is not recommended if you have many meetings).
3. In the **Recurring availability** section, you should erase all Recurring availability and click **save**. Then go into the **Date-specific availability** section and only highlight the days and times for the event.
4. If you want to notify hosts on each individual booking, the email address of each host should be added to their Booking page so that they get scheduling confirmation emails.
5. In the Booking page **Public content** section, you may add **tags** for each host. Attendees will be able to filter hosts by using tags on the Booking page. This additional filter enables attendees to find the host with whom they need to book time in a fast and efficient manner.
6. Complete the rest of the Booking page settings.
7. Create a Master page.
8. Select the Booking pages to include on the Master page in the **Assignment** section.
9. In the **Labels and instructions** section of the Master page, customize the selection of text and labels. If you added tags to Booking pages, the tags added to each Booking page will be displayed. Note that you should ensure that all Booking pages included on the Master page have tags, so your Booking page can offer your Customers a fully functional tag filtering experience.
10. Add details to your Master page in the **Public content** section. These will be the details of your event, as this page will represent your event and list all hosts that can accept bookings.
11. Test your Master page by clicking on the live link in the Overview section of the Master page. This is the link that you will share with attendees. Alternatively, you can publish the Master page on your event website.
12. When the booking is completed, all appointments will be in your ScheduleOnce Activity stream. Using ScheduleOnce Reports, you can generate a schedule for the conference for each host, as well as a meeting schedule for each attendee. Each host should receive their corresponding Booking page report, listing the times and details of meetings with each attendee. Each attendee can be given a Customer report, listing the times of meetings with their selected hosts.

The reports can be created in an Excel spreadsheet, a CSV file or as a PDF. Your custom report header can be added to PDF reports only. To upload your own branded report header, follow the steps below.

1. Click on **Reports** and select any report type.
2. Click the action menu (three dots) on the right, as shown in Figure 1 below.

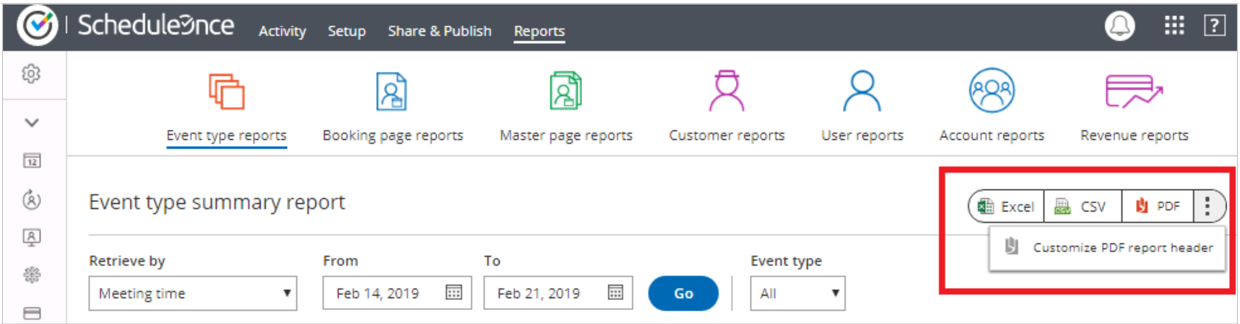


Figure 1: Reports page

3. Click **Customize PDF report header**.
4. In the **Report header** pop-up, click **Choose File** to upload your own header (See Figure 2).
5. When you've finished, click **Save**.

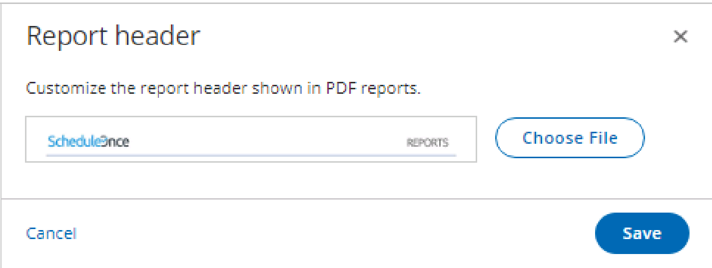


Figure 2: Report header pop-up

Note:

The recommended dimensions for a Report header are 840 pixels wide and 70 pixels high.

Multiple Team members accepting appointments without Event types

Last Modified on Oct 13, 2022

Tip:

OnceHub recommends using Event types for multiple Team members accepting appointments. Event types allow you to offer several meeting types with different durations, price, and other properties on one Booking page or Master page.

You can use OnceHub to accept bookings for multiple Team members. Team members can be accessed via one Master page or independently via their individual Booking pages. Learn more about User management

Requirements

You must be a OnceHub Administrator to set up this scenario.

How to set up

1. Select your profile picture or initials in the top right-hand corner → Profile settings → **Users**.
2. Create a User account for each Team member.
3. You can create a Booking page for each Team member and make the Team member the Owner of the page. Alternatively, you can let the Team members create their own Booking pages. Learn more about Booking pages
4. If you want to group the Booking pages under one page, you can create a Master page. Make sure you select Booking pages only (without Event types) as your Master page scenario.
5. In the Assignment section, select the Booking pages you want to add to the Master page.
6. If you have a lot of Team members, you might want to add Tags to your Booking pages so that Customers can find the person they want to book with in a fast and efficient manner. Tags enable Customers to filter Booking pages by keywords. Learn more about Tags
7. In addition, you can use categories to organize your Booking pages. Categories enable you to better model your scheduling scenarios. This results in a booking process that is faster, easier to navigate, and creates a better overall scheduling experience for your Customers. Learn more about categories

You're all set! To test your Master page, go to the Master page Overview and make a test booking by using the public link in the **Share & Publish** section.

Room and resource scheduling without Rule-based assignment

Last Modified on Oct 13, 2022

In this article, you'll learn about the setup for booking resources such as a room directly, where the resource is the entity that is being booked.

If you need to accept appointments and also reserve a resource, please see the Booking conditional on the availability of a single resource article and the Booking conditional on the availability of multiple resources article.

Setting up scheduling for rooms and resources without Rule-based assignment

Important:

Resource scheduling can be done in your connected calendar with regular Outlook Calendar or Google Calendar, or with organizational resource calendars.

Learn more about using Exchange resource calendars

Learn more about using G Suite resource calendars

1. If you're not using organizational resource calendars, create a calendar for each resource. All resource calendars can be created in your calendar as sub calendars.
2. Hover over the lefthand menu, select the Booking pages icon, and create a Booking page for each resource.
3. In the Associated calendars section of each Booking page, select the resource's calendar as the calendar that bookings are created in, and also as the calendar that busy time is retrieved from.
4. In the Booking page Public content section, you can add tags for each resource. This will allow Customers to filter the resource list by tag properties, enabling the Customer to quickly find the appropriate resource and make a booking.
5. At this point, you need to decide between two approaches: you can either use Booking pages only, or you can use Booking pages and Event types.
   Event types can be used to specify the booking duration, and enable use of Payment integration, which you can use to collect payment every time the resource is booked. A different price can be set for each Event type specifying the different booking durations. Learn more about using multiple Event types
6. If you choose to use Booking pages only, all settings are on the Booking page.
7. If you choose to use Event types for duration, the Scheduling options, Time slot settings, Customer notifications, Booking form and redirect and Payment and cancel/reschedule policy sections will be on each Event type. Learn more about Event types
8. If you want to work in Automatic booking mode, people will select a single time and the reservation will be made. You can also work in Booking with approval mode and then you will have to approve each reservation before it is created.
9. Once you're done with the settings, create a Master page.
10. If you **do not** want to use team or panel pages to automatically assign to bookings and want Customers to select the resource they need, select one of the other three options in the **New Master page** pop-up (Figure 1).

These are Event types first, Booking pages first, or Booking pages only.

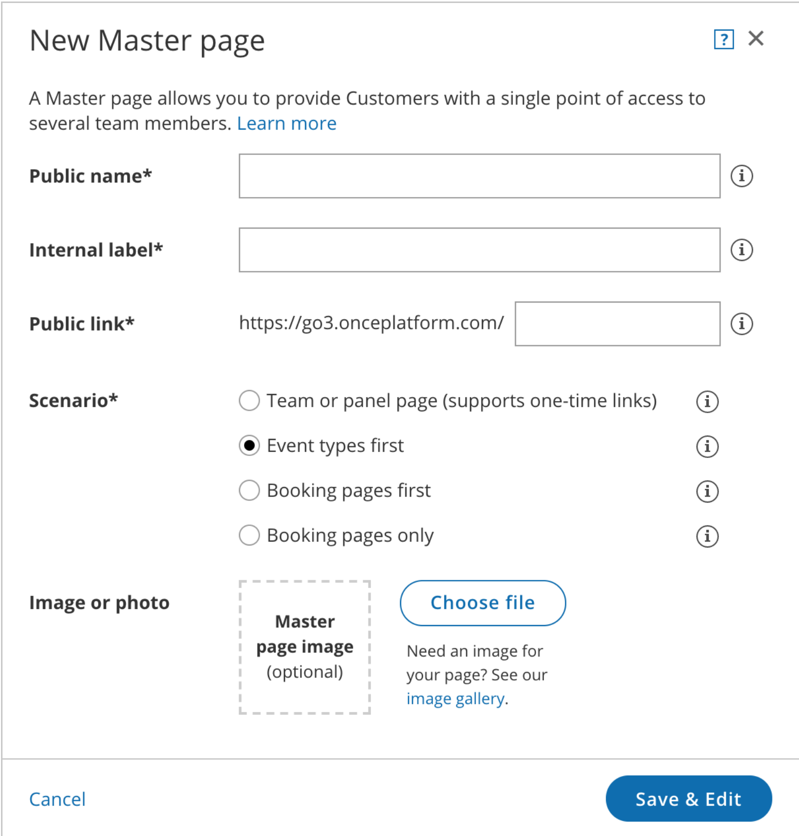


Figure 1: New Master page popup

11. Go to the Event types and assignment section and select which Booking pages you want to include from the drop-down.
12. In the Labels and instructions section, define the Public labels.
13. In the Public content section, provide details which your Customers see when they book with you.

You're all set! To test your Master page, go to the Master page Overview and make a test booking by using the public link in the **Share & Publish** section.

Multiple Team members accepting appointments with Event types without team or panel pages

Last Modified on Oct 13, 2022

You can use OnceHub to accept bookings for multiple Team members with multiple Event types. Team members can be accessed via one Master page or independently via their individual Booking pages. Learn more about User management

Bookings made on a Master page can be either automatically assigned to team members according to rules you define or assigned based on the customer's selection. In this article, we will talk about assignment based on the customer's selection.

Requirements

You must be a OnceHub Administrator to set up this scenario.

How to set up

1. Create the Event types. If you want to work in Automatic booking mode, make sure to select it in the Scheduling options section of each Event type. You can also work in Booking with approval mode.

   > **Note::**
   >
   > If you want to automatically assign bookings, you must use Automatic booking mode.

2. Select your profile picture or initials in the top right-hand corner → Profile settings → **Users**.
3. Create a User account for each Team member.
4. You can create a Booking page for each Team member and make the Team member the Owner of the page. Alternatively, you can let Team members create their own Booking pages. Learn more about Booking pages
5. Once all Event types are created and all Booking pages are created you can go to the Event types section in each Booking page to add Event types to the page. Alternatively, you can ask each user to add Event types to her/his Booking page.
6. Create a Master page. If you **do not** want to use team or panel pages to automatically assign to bookings and want Customers to select the resource they need, select one of the other three options in the **New Master page** pop-up (Figure 1). These are Event types first, Booking pages first, or Booking pages only.

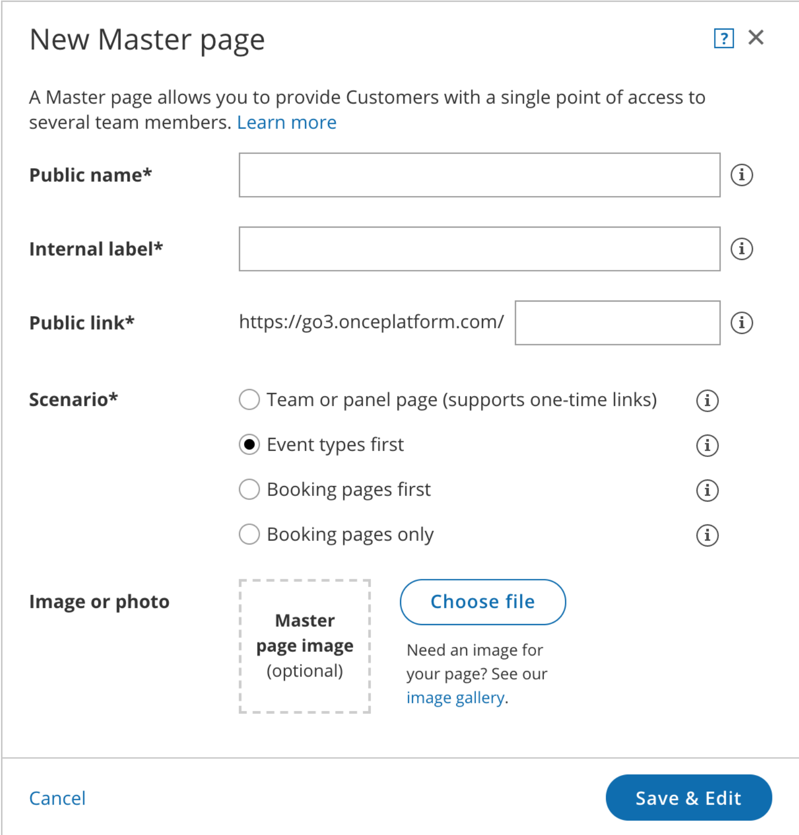


Figure 1: New Master page popup

7. Click **Save & Edit**.
8. You will be redirected to the Overview section of the Master page. This section gives you a summary of your Master page's main properties. Here you can edit the Master page's **Theme** and **Locale**, as well as access its **Share & Publish** options.
9. In the Event types and assignment section, select the Booking pages to add to the Master page.
10. Customize the page's Labels and instructions and Public content.
11. If you have a lot of Team members, you might want to add Tags to your Booking pages so that Customers can find the person they want to book time with in a fast and efficient manner. Tags enable Customers to filter Booking pages by keywords. Learn more about Tags
12. In addition, you can use Categories to organize your Booking pages or Event types. Categories enable you to better model your scheduling scenarios. This results in a booking process that is faster, easier to navigate, and creates a better overall scheduling experience for your Customers. Learn more about Categories

You're all set! To test your Master page, go to the Master page Overview and make a test booking by using the public link in the **Share & Publish** section.

Using Group sessions (number of bookings per slot) without a connected calendar

Last Modified on Jun 2, 2023

Tip:

OnceHub recommends using Group sessions with a connected calendar. Learn more about the differences between working with or without a connected calendar.

Group sessions allow you to offer the same time slot to multiple Customers, with a set quota for how many are allowed to book that exact time slot. You can use Group sessions for lectures, webinars, or other events where more than one Customer signs up for the same time. **See a demo**

On-on-one sessions and Group sessions options are set up in the Scheduling options section of the Booking page.

Note:

If you have linked your Booking page to at least one Event type, the Scheduling options will be on the Event type and not on the Booking page.

Booking Pages provides three options to control the number of bookings per time slot:

One-on-one session: In this mode, the slot becomes unavailable as soon as a booking is made. This is the default setting.

Group session - multiple bookings per slot: You can specify the number of bookings that can be made before the slot becomes unavailable. This mode is used to accept bookings for activities that serve more than one Customer at a time like classes, tours and many types of group sessions.

Group session - unlimited bookings per slot: In this mode, there is no limit on the number of bookings per slot. This mode will never block availability. Unlimited bookings per slot is used for webinars and online classes where there is no physical limitation on capacity.

When using OnceHub **without** a connected calendar, the following rules apply.

Rules for One-on-one sessions

1. Only bookings made directly on the Booking page will close the slot.
2. Each booking can be canceled or rescheduled by the Customer or the Owner. This will free up the slot so that a new booking can be made. If the event is in the User's calendar, he should remember to remove it manually.

Rules for Group sessions - multiple bookings per slot

1. Only bookings made directly on the Booking page will close the slot.
2. Each booking will be counted as one booking towards the capacity defined in the Booking page or Event type. For example, if a Booking page is set to accept two bookings per slot, both bookings must be created via the Booking page to block availability.
3. A scheduling confirmation email is sent for each booking and the User can manually add each booking to the

calendar by clicking the calendar event in the scheduling confirmation email.

4. Each booking can be canceled or rescheduled by the Customer or the User. This will free up the slot so that a new booking can be made. If the event is in the User’s calendar, he should remember to remove it manually.

Rules for Group sessions - unlimited bookings per slot

1. Unlimited bookings per slot will not block availability on your Booking page.
2. A scheduling confirmation email is sent for each booking and the User can manually add each booking to the calendar by clicking the calendar event in the scheduling confirmation email.
3. Each booking can be canceled or rescheduled by the Customer or the Owner. This will not affect the slot's capacity, as it is unlimited. If the event is in the User’s calendar, he should remember to remove it manually.

Can Customers invite Guests to a booking?

Last Modified on Jun 8, 2023

You can allow your Customers to invite additional attendees to their meetings. When Customers fill out your booking form, they can invite up to 10 attendees to their meeting. Additional attendees will receive all OnceHub Customer notifications and a calendar invite for the meeting.

Use the Customer guests feature when you'd like to meet several colleagues on your Customer's side, or with a couple for a coaching or advising session. In either case, the single Customer that makes the booking will invite their guests as well. Booking pages also supports several other methods for multiple Customers to attend each meeting, like Group sessions and Group scheduling. Learn more about multiple attendee meetings

Typical use cases

- When scheduling sales meetings or demos, you'd like to allow your Customer to invite additional colleagues, team members or stakeholders. The whole team attending the same meeting facilitates an efficient use of everybody's time.
- When providing support, you'd like the Customer to invite additional technical staff that are needed for a swift solution.
- You'd like your Customer to invite their partner to a financial advising session, annual reviews or coaching services.
- Some types of meetings require both partners to attend, such as legal meetings or marriage counseling.

Add the Customer guests field to your Booking form so the field will show in the Booking form step during the Customer's scheduling flow. The Customer will be allowed to invite additional guests at her own discretion. Her partner or colleagues will be invited to the meeting and receive all notifications, as if they made the booking themselves. The main Customer and her invitees will appear as guests on the calendar event, and get all updates as well (unless your calendar does not update attendees).

Customer guests lifecycle

1. Add the **Customer guests** field to the Booking form in the **Booking form editor**. It can be found in the **Systems fields** in the **Fields library** on the right sidebar. The title and subtitle can be edited, and the field can be marked as optional or mandatory.
2. Make sure the correct Booking form is selected on the Booking form and redirect section of the relevant Booking page or Event type.
3. The field is made available to the Customer as part of the **Booking form step**, and they can type up to 10 email addresses into the field. The emails can be separated by commas, semicolons, spaces or Enter keys.
4. The confirmation page messages indicate that additional guests were invited by the Customer.
5. The main Customer and all the guests they invited are added as guests to the **calendar event**. All will be updated with any subsequent changes to the calendar event, like rescheduling or cancellation (unless your calendar does not update attendees).
6. The main Customer receives **Customer notifications** as set in the Customer notification section. All Customer guests are CCed to these notifications, so they also receive them.
7. The list of Customer guest emails is **added to all notifications** by default, and appears in both User and

Customer notifications, unless removed using the Notification templates editor. The default label of the field is **Additional guests** in the Customer notifications and **Customer guests** in the User notifications.

8. When the **Cancel/reschedule** link is used, a special message on the cancel/reschedule page notifies the Customer that any change they make will impact all participants invited to the meeting.
9. On the User side, the list of Customer guest emails is added to the **Activity stream** and may be added into **Reports** as an optional column.

Introduction to Event types

Last Modified on Oct 15, 2024

Event types represent the different services you offer. You can create several different meeting types, and each can have a different duration, price, and other properties which you can define. Event types can be associated with Booking pages or included on Master pages to create unique scheduling scenarios that suit you.

For example, let's say you are an accountant who holds three types of meetings: a free 15-minute discovery session, a 60-minute tax return preparation session with a fee of $100, and a 90-minute financial planning session with a fee of $150. You can create each meeting type as an Event type and set a different duration and price for each meeting. Customers who go to your Booking page will choose which Event type they need, pay accordingly, and your time will be blocked respectively.

Event type sections

When your Booking pages are associated with Event types (recommended), the following sections are located on the Event type by default:

- Scheduling options: Select the options that correspond to the scheduling scenario that you require.
- Time slot settings: Select how time slots are displayed to Customers and set limits on your available time.
- Booking form and redirect: Select the settings of the form that Customers will fill out when they make a booking with you. If you would prefer for this section to be related to the Booking page, you can change its location. See below for more details
- Customer notifications: Select which notifications you want to send to Customers and the timing of reminder and follow-up notifications. If you prefer this section to be related to the Booking page, you can change its location. See below for more details
- Payment and cancel/reschedule policy: Set the payment and pricing settings and the time frame in which your Customers can cancel or reschedule bookings. When using Payment integration, you can collect payment via OnceHub and process refunds via OnceHub.
- Public content: Manage all the information that is available to your Customers when they book an appointment.

Booking form and Customer notifications sections

When you work with Event types, you have the option to define whether the Booking form and Customer notifications sections will be related to the Event type or the Booking page.

The location of the Booking form and redirect section depends on whether or not your Booking page has any Event types associated with it.

- For Booking pages associated with Event types, go to **Booking pages** → select the relevant **Event type** → **Booking form and redirect** section.
- For Booking pages **not associated** with Event types, go to **Booking pages** → select the relevant **Booking page** → **Booking form and redirect** section.

You can change the location of the **Booking form and redirect** section and **Customer notification** section to be located on the Booking page or the Event type. To set the location, go to **Booking pages** → **Event types** pane → action menu (three dots) → **Event type sections**. Learn more about Event type sections

Managing these settings by the Event type ensures that all Customers booking a specific Event type will be asked to provide the same information and receive the same notifications, no matter which Booking page the appointment is related to. If you prefer these settings to be related to the Booking page, each Booking page owner can determine the Booking form and notifications that Customers booking on that page will encounter, regardless of the Event type booked.

It's important to decide where you want the Booking form and Customer notifications sections to be located prior to creating Event types. To decide which setup is right for you, consider your scenario and how you want to collect information.

Learn more about the location of the Booking form and Customer notifications sections and the impact it has on your scheduling scenario.

Availability and location

When you're thinking about your scheduling scenario, it is important to keep in mind that the Recurring availability, Date-specific availability, and **Conferencing / Location** sections are always located on the Booking page and not on Event types.

If you want to offer meetings in different locations or some meetings at a particular time, you will need to offer them on different Booking pages. These Booking pages can be combined into a Master page to provide a single point-of-access for your Customers. Learn more about using Booking pages for multiple meeting types

Event types and Booking pages can also be combined to offer your Customers range of meeting types at several locations and times to create the right scenario for your organization. Learn more about using both Event types and Booking pages for multiple meeting types

Creating an Event type

Last Modified on Nov 17, 2022

An Event type defines a type of meeting offered to Customers. Creating new Event types is easy, and you can create as many as you need. You can create a new Event type from scratch or duplicate an existing Event type to copy all your settings.

In this article, you'll learn how to create a new Event type.

Requirements

To create Event types, you must be a OnceHub Administrator.

Creating an Event type

1. Go to **Booking pages** in the bar on the left.
2. Click the Plus button in the **Event types** pane. Another way to create a new Event type is by duplicating an existing one that is similar to the one you're creating.
3. The **New Event type** pop-up appears (Figure 1).

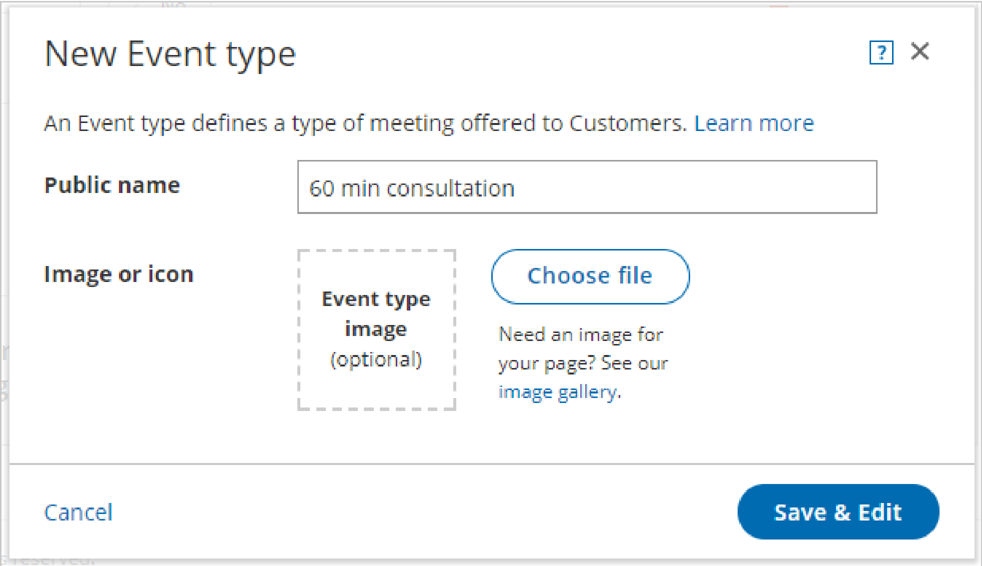


Figure 1: New Event type pop-up

4. Define the properties for your Event type:
   - **Public name:** The Public name is visible to Customers as the meeting type title. It can be changed in the Public content section later.
   - **Image or icon (optional):** You may add an icon or image that will be visible to Customers. It can be changed in the Public content section later.
   - Additional properties will be available after clicking **Save & Edit**.
5. Click **Save & Edit**. You will be redirected to the Event type Overview section to continue editing your settings.

Event type: Overview section

Last Modified on Oct 13, 2022

The Event type Overview section summarizes the main properties of a specific Event type. It includes the main settings, associated Booking pages, Users who provide the Event type, and Master pages it is offered through.

To switch between **Overview** sections of different Event types without returning to **Booking pages setup**, use the shortcut dropdown in the top right corner (Figure 1).

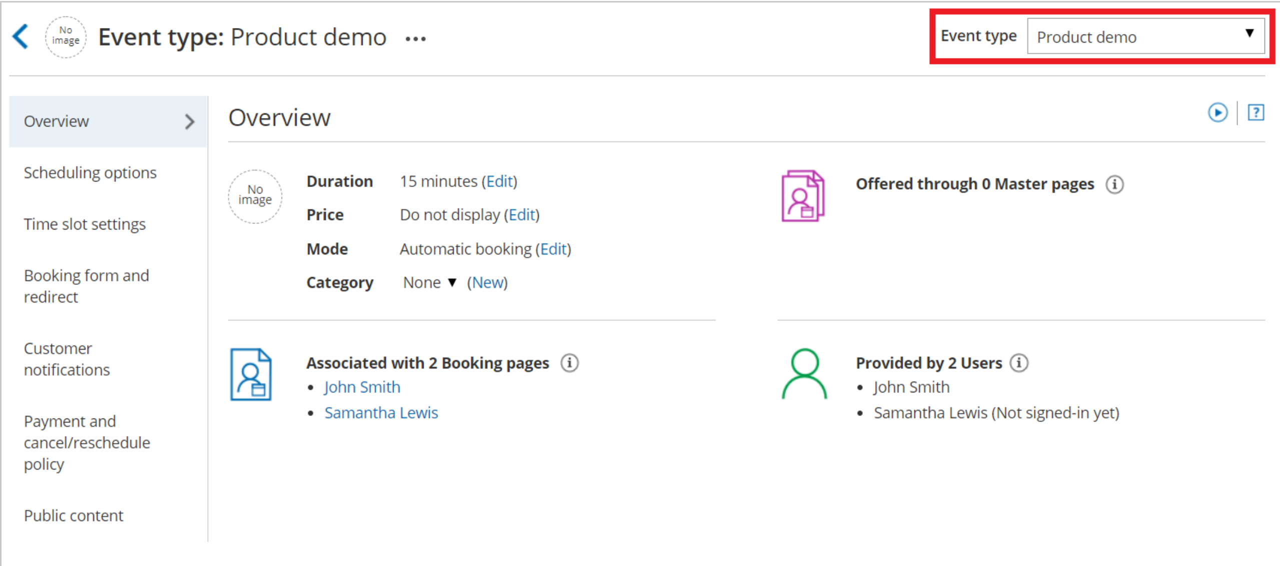


Figure 1: Event type Overview section

Main settings

- **Duration:** The duration of the slot allocated for each booking. Learn more about Time slot display
- **Price:** Each Event type may show a price. Users can collect payment via OnceHub, show a price only, or show no price.
- **Mode:** Select from between Automatic booking mode and Booking with approval mode. Learn more about Scheduling options
- **Category:** Categories organize Event types for you and your Customers. Learn more about Categories

Associated Booking pages

Use this list to review Booking pages associated with this Event type (Figure 2). Click on the Booking pages here to navigate to any that you would like to edit.

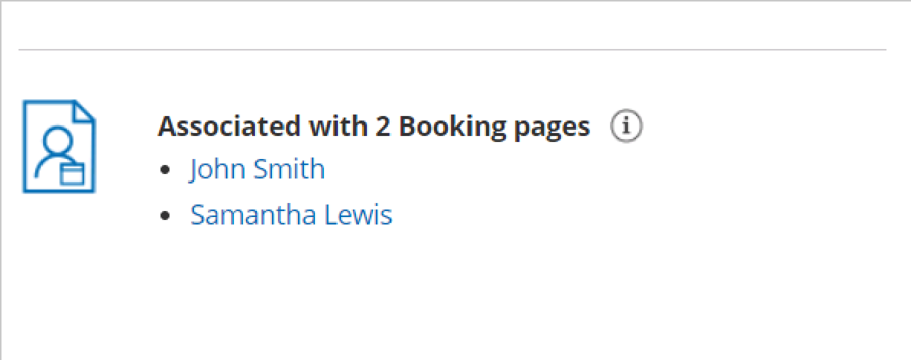


Figure 2: Associated Booking pages

Event types are a powerful tool to standardize the meeting types that will be offered on different Booking pages. Create one or more Event types with specific meeting requirements, then associate them with one or more Booking pages by going to the Event types section of the Booking page.

Users that provide the Event type

Use this list to review Users that provide this Event type (Figure 3). Event types are indirectly related to Users through Booking pages. As mentioned above, Event types can be associated with Booking pages. In turn, each Booking page has an Owner who is the User who will be accepting the bookings. When the Booking page is associated with one or more Event types, the User who owns the Booking page will be providing these Event types.

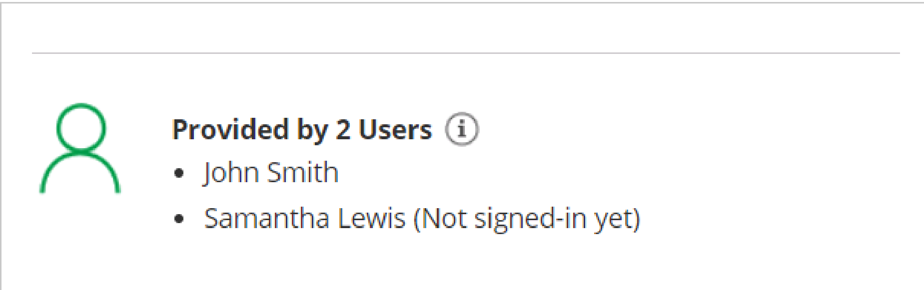


Figure 3: Users that provide the Event type

To set up this relationship, you need to do the following steps:

1. Associate Event types with a Booking page in the Event types section of the Booking page.
2. Set that Booking page to be owned by the User in the Overview section of the Booking page.

Master pages that offer the Event type

Use this list to review Master pages that offer this Event type (Figure 4). Navigate to any of them that you would like to edit. Master pages provide a single point of access to several Booking pages, and may offer different Event types.

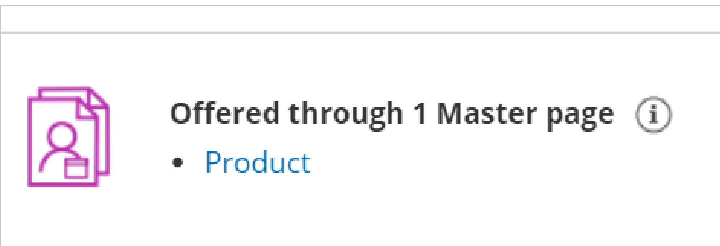


Figure 4: Master pages that offer the Event type

Event types can be directly or indirectly linked to a Master page, depending on the Master page's scenario. If you're using a Rule-based assignment Master page with Dynamic rules, the relationship is direct. You can select Event types to associate with your Master page.

In all other scenarios, the relationship is indirect. Which Event types are offered in your Master page is determined by the Booking pages included in your Master page. The Event types associated with those Booking pages will be offered in your Master page.

To set up this relationship using Rule-based assignment with Static rules, Event types first, or Booking pages first

1. In the Event types section of each Booking page, choose Event types to associate with the Booking page.
2. Set up your Master page with one of the following scenarios: Event types first, Booking pages first, or Rule-based assignment.
3. In the Assignment section of your Master page, include these Booking pages in the Master page.

To set up this relationship using Rule-based assignment with Dynamic rules

1. Set up your Master page with Rule-based assignment.
2. In the Assignment section of the Master page, in the **Rule types** step select **Dynamic rules**.
3. In the **Event-based rules** step, add rules with the Event types you would like to offer in your Master page.

Tip:

If you would like to generate one-time links which are good for one booking only, you should use a Master page using Rule-based assignment with Dynamic rules.

One-time links eliminate any chance of unwanted repeat bookings. A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page. One-time links can be personalized, allowing the Customer to pick a time and schedule without having to fill out the Booking form. Learn more about one-time links

Event type: Payment and cancel/reschedule policy section

Last Modified on Oct 13, 2022

OnceHub enables you to specify when your Customers can cancel or reschedule a booking. The cancel/reschedule policy only affects your Customers. They can cancel or reschedule on the Customer Cancel/reschedule page. Users are not subject to the Cancel/reschedule policy and they can cancel or reschedule at any time from the Activity stream.

When you use Payment integration, you can charge a reschedule fee or automatically process refunds when Customers reschedule or cancel bookings. The policy settings will vary based on the payment option that you choose.

Location of the Payment and cancel/reschedule policy section

To edit the Payment and cancel/reschedule policy for your Event type, go to **Booking pages →** select the relevant Event type → **Payment and cancel/reschedule policy** (Figure 1).

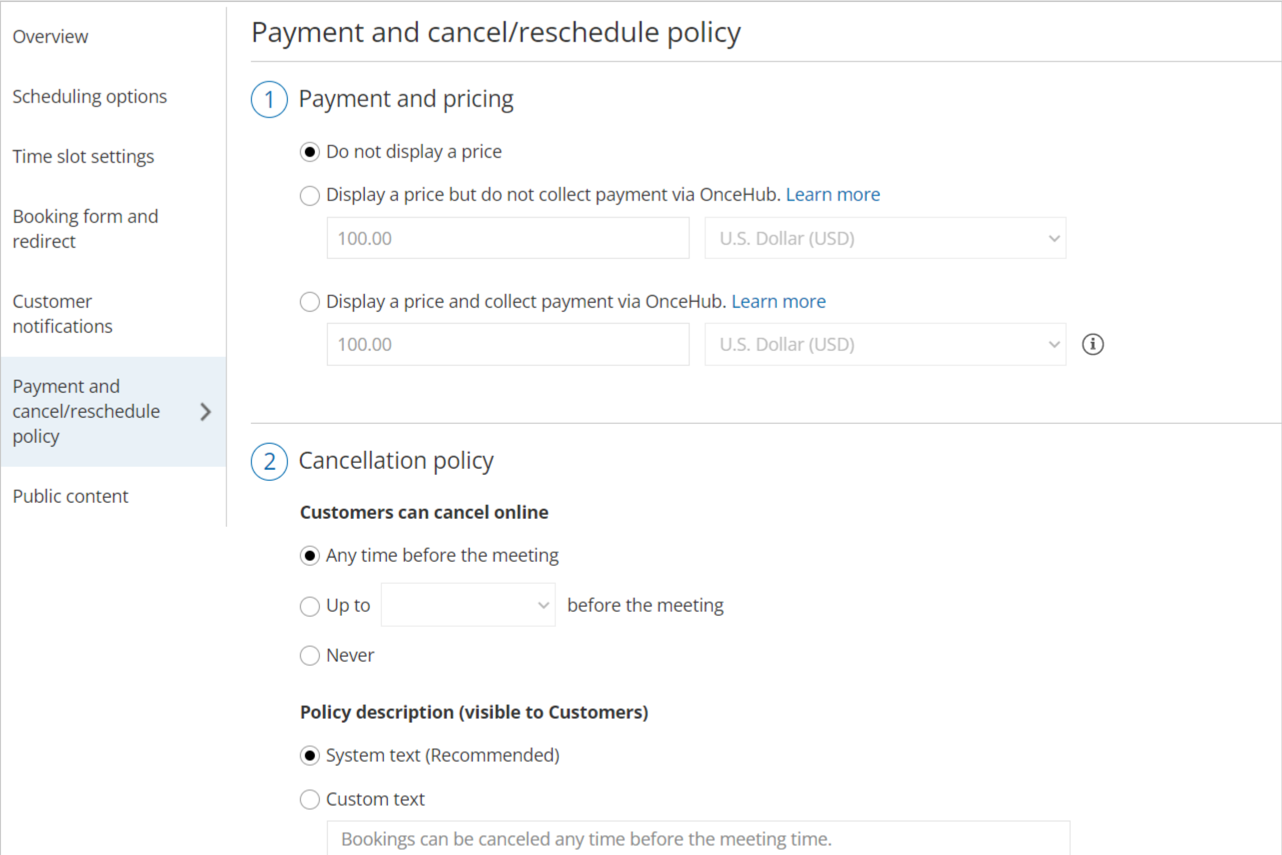


Figure 1: Payment and cancel/reschedule policy section

Payment collection options

Do not display a price

When you choose not to display a price, you define the timeframe during which Customers are permitted to cancel or reschedule a booking. You can also customize the policy description visible to Customers on the Cancel/reschedule page. Learn more about the Cancel/reschedule policy when not displaying a price

Display a price but do not collect payment via OnceHub

When you choose to display a price but do not collect payment via OnceHub, you set the price for your Event type but collect payment and process refunds manually (not via OnceHub).

You can customize the policy description to include the refund amount your Customers will receive if they cancel, or the reschedule fee they'll be charged if they reschedule. All payment transactions will be handled manually and not via OnceHub. Learn more about displaying a price and not collecting payment via OnceHub

Display a price and collect payment via OnceHub

In order to display a price and collect payment via OnceHub, your OnceHub account must be connected to PayPal. When you choose this option, payments are collected automatically when Customers schedule or reschedule a booking.

Depending on your Refund settings, you can also enable OnceHub to automatically process refunds when Customers cancel a booking. This allows you to streamline your payment and refund processes and provide a seamless customer experience. Learn more about displaying a price and collecting payment via OnceHub

Event type: Payment and cancel/reschedule policy when a price is not displayed

Last Modified on Oct 13, 2022

You can specify when your Customers can cancel or reschedule a booking.

In this article, you'll learn how to configure the Customer Cancellation policy and Reschedule policy when you do not display a price for your Event type.

Customer Cancel/reschedule policy rules

The following rules apply to the Customer Cancel/reschedule policy:

- The Cancellation and Reschedule policy only affects your Customers. Users are not subject to the policy and they can cancel or reschedule at any time from the Activity stream.
- The Customer can always access the Customer cancel/reschedule link in Default email and calendar invite templates, regardless of the Cancel/reschedule policy. The policy will be reflected on the Customer Cancel/reschedule page that the Customer accesses via the Cancel/reschedule link. The policy will always reflect the settings that were saved at the time of the initial booking.
- If you're working in Booking with approval mode, the Customer Cancel/reschedule policy does not apply to booking requests. However, it will apply to scheduled or rescheduled bookings.

Configuring the Customer Cancel/reschedule policy

1. Go to **Booking pages** in the bar on the left. .
2. In the **Event types** section, click on the Event type you want to edit.
3. Click the **Payment and cancel/reschedule policy** section (Figure 1).

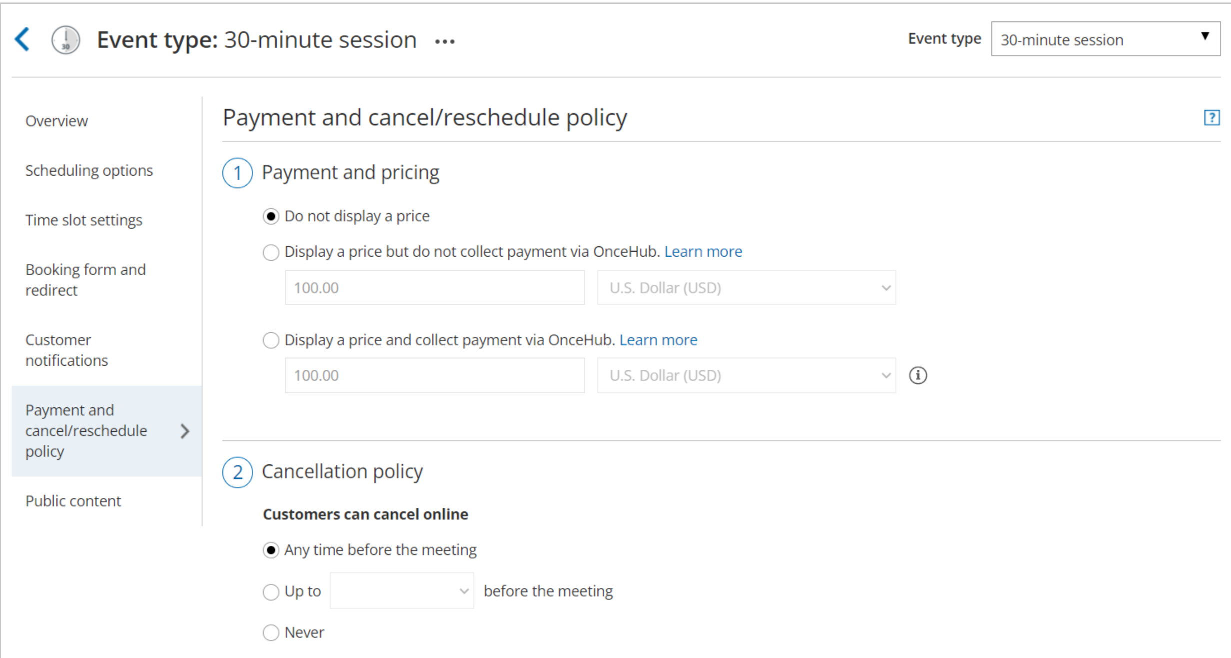


Figure 1: Payment and cancel/reschedule policy

4. In the **Payment and pricing** step, select **Do not display a price** (Figure 2).

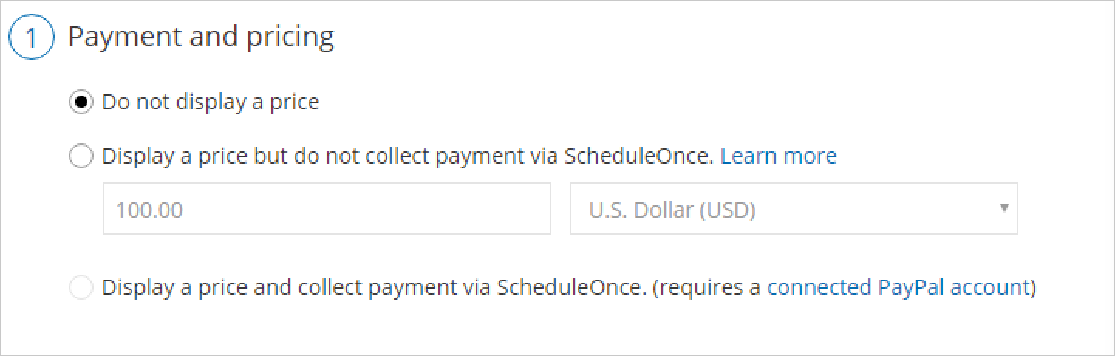


Figure 2: Payment and pricing step

5. In the **Cancellation policy** step (Figure 3), select your preferred option.

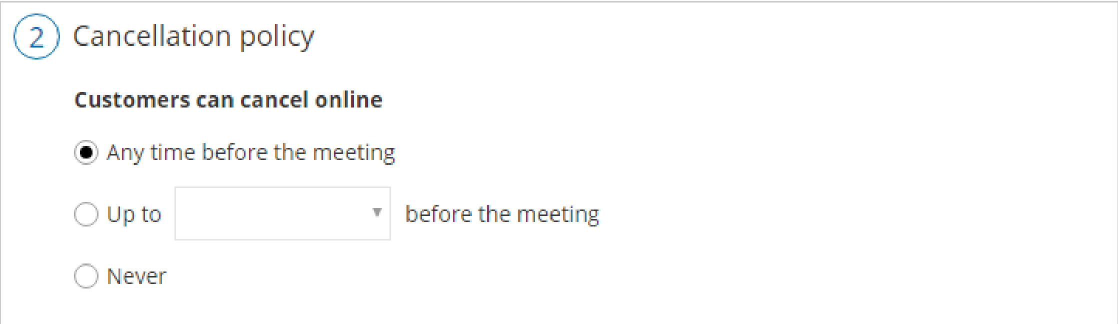


Figure 3: Cancellation policy

- **Any time before the meeting**: This means that Customers can cancel right before the scheduled meeting time. This can be a matter of minutes before the meeting.
- **Up to a certain time before the meeting**: In this case, you can select how long before the scheduled meeting time that the Customer can cancel. The possible values range from 15 minutes to 14 days.
- **Never**: In this case, the Customer will never be able to cancel the booking.

> **Note:**
>
> When you work with Session packages, Customers can cancel each session independently and each session is subject to the Cancellation policy.

6. In the **Cancellation policy** step, you can also define the **Policy description** that is visible to Customers on the Customer Cancel/reschedule page. By default, OnceHub generates an automatic text based on your selection. You can decide to use your own custom text instead if you want to customize the cancellation policy description.
7. Finally, in the **Cancellation policy** step you can also choose to ask your Customers to give you a **cancellation reason** (see Figure 4). This question will be displayed on the Customer Cancel/reschedule page. You can choose to make the cancellation reason **Mandatory**, **Optional**, or choose not to display the field at all by selecting **Don't ask**.

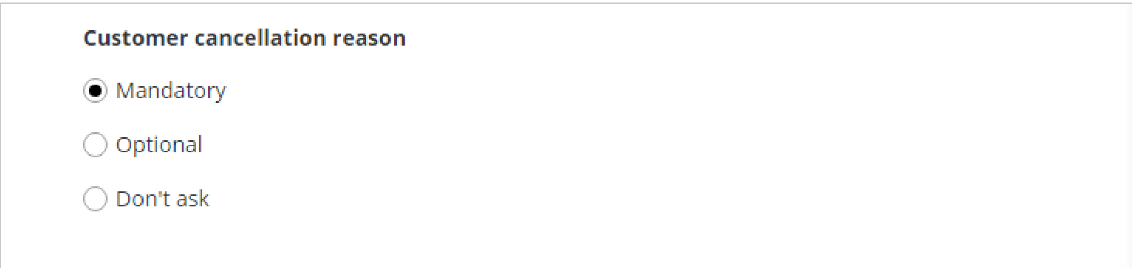


Figure 4: Customer cancellation reason

8. In the **Reschedule policy** step (Figure 5), you can select the following options.

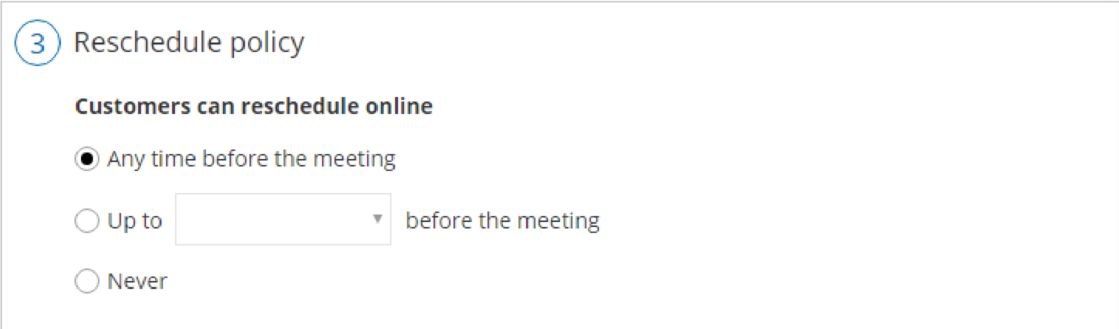


Figure 5: Reschedule policy

- **Any time before the meeting**: This means that Customers can reschedule right before the scheduled meeting time. This can be a matter of minutes before the meeting.
- **Up to a certain time before the meeting**: In this case, you can select how long before the scheduled meeting time that the Customer can reschedule. The possible values range from 15 minutes to 14 days.
- **Never**: In this case, the Customer will never be able to reschedule the booking.

> **Note:**
>
> When working with Session packages, Customers can reschedule each session independently and each session is subject to the Reschedule policy.

9. In the **Reschedule policy** step, you can also define the **Reschedule policy description** that is visible to Customers on the Customer Cancel/reschedule page. By default, OnceHub generates an automatic text based on your selection. You can decide to use a custom text instead if you want to customize the Customer reschedule policy description.
10. Finally, in the **Reschedule policy** step (Figure 6) you can also choose to ask your Customers to give you a **reschedule reason**. This question will be displayed on the Customer Cancel/reschedule page. You can choose to make the cancellation reason **Mandatory**, **Optional**, or choose not to display the field at all by selecting **Don't ask**.

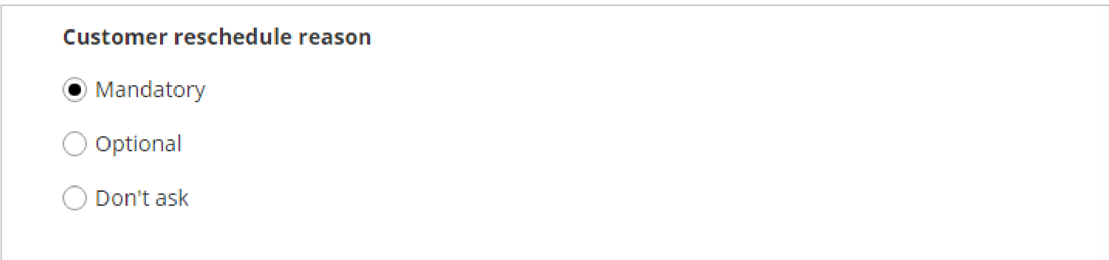


Figure 6: Customer reschedule reason

Congratulations! You've now set the Customer Cancel/reschedule policy that is displayed on the Cancel/reschedule page for your Event type.

Event type: Payment and cancel/reschedule policy when a price is displayed

Last Modified on Jun 8, 2023

Booking pages enables you to specify when your Customers can cancel or reschedule a booking.

In this article, you'll learn how to configure the Customer Cancellation policy and Reschedule policy when you display a price for your Event type, but do not collect payment via OnceHub .

Displaying a price but not collecting payment via OnceHub

When you display a price for your Event type but do not collect payment via OnceHub, you set the price for your Event type, but collect payment and process refunds manually (not via OnceHub).

You can also customize the cancellation and reschedule policy description displayed to Customers to include the refund amount they will receive if they cancel, or the reschedule fee they will be charged if they reschedule.

Customers should be informed that all payment transactions will be handled manually and not via OnceHub.

> **Note :**
>
> You have the option to collect payment via OnceHub and automate your cancellation and reschedule policy. Learn more about collecting payment via OnceHub

Customer Cancel/reschedule policy rules

The following rules apply to the Customer Cancel/reschedule policy:

- The Cancellation and Reschedule policy only affects your Customers. Users are not subject to the policy and can cancel or reschedule at any time from the Activity stream.
- Your Customers can always access the Customer cancel/reschedule link in default email and calendar invite templates, regardless of the Cancel/reschedule policy. Your customized policy will be reflected on the Customer Cancel/reschedule page that the Customer accesses via the cancel/reschedule link. The policy will always reflect the settings that were saved at the time of the initial booking.
- If you are working in Booking with approval mode, the Customer Cancel/reschedule policy does not apply to booking requests. However, it will apply to scheduled or rescheduled bookings.

Configuring the Customer Cancellation and Reschedule policy

1. Go to **Setup** -> **OnceHub setup** in the top navigation bar.
2. In the **Event types** section, click on the Event type you want to edit.
3. Click the **Payment and cancel/reschedule policy** section (Figure 1).

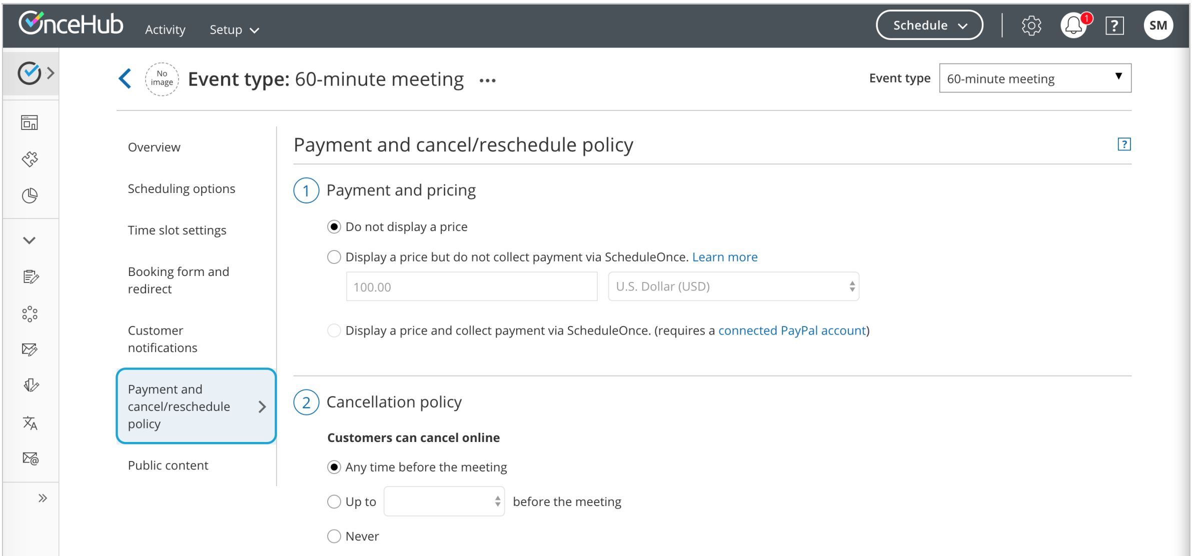


Figure 1: Payment and cancel/reschedule policy

4. In the **Payment and pricing** step, select **Display a price but do not collect payment via OnceHub** (Figure 2).

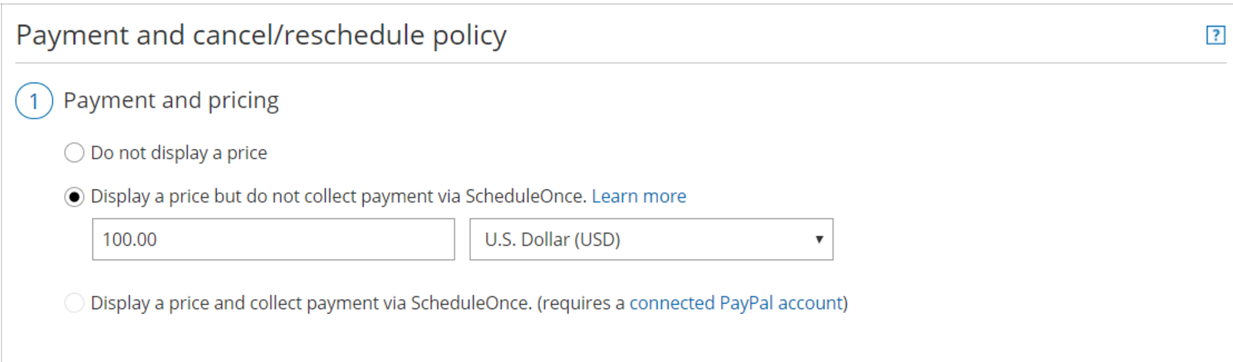


Figure 2: Payment and pricing

5. In the **Cancellation policy** step (Figure 3), select your preferred option.

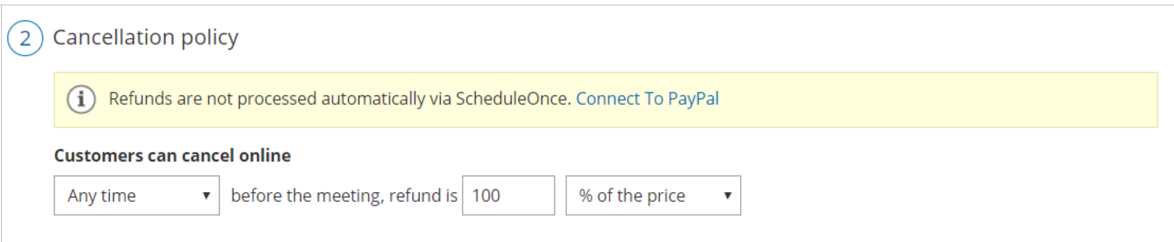


Figure 3: Cancellation policy

- **Any time before the meeting**: This means that Customers can cancel at any time before the scheduled meeting time. This can be a matter of minutes before the meeting. You can inform Customers of the refund amount they will receive if they cancel the booking. Note that refunds will not be processed automatically via OnceHub.
- **Up until a certain time before the meeting**: In this case, you can select how long before the scheduled meeting time the Customer can cancel. The possible values range from 15 minutes to 14 days. You can inform Customers of the refund amount they will receive if they cancel the booking before and after the milestone. Note that refunds will not be processed automatically via OnceHub.
- **Never**: In this case, the Customer will never be able to cancel the booking.

Note

When you work with Session packages, Customers can cancel each session independently and each session is subject to the Cancellation policy. In the **Payment and cancel/reschedule policy** section, you set the package price and the refund amount that Customers will receive if they cancel each session independently.

6. In the **Cancellation policy** step, you can define the **Policy description** that is visible to Customers on the Customer Cancel/reschedule page. By default, OnceHub generates an automatic text based on your selection. You can decide to use a custom text instead if you want to customize the Customer cancellation policy description.
7. Finally, in the **Cancellation policy** step you can also choose to ask your Customers to give you a **cancellation reason** (see Figure 4). This question will be displayed on the Customer Cancel/reschedule page. You can choose to make the cancellation reason **Mandatory**, **Optional**, or choose not to display the field at all by selecting **Don't ask**.

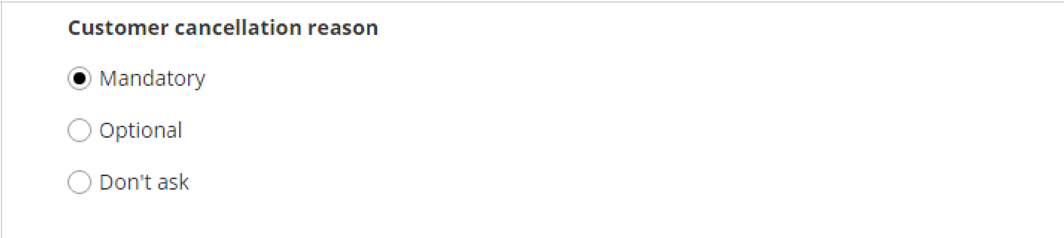


Figure 4: Customer cancellation reason

8. In the **Reschedule policy** step (Figure 5), you can select the following options.

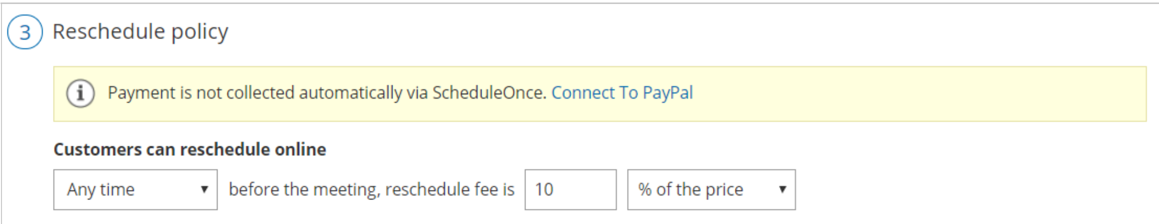


Figure 5: Reschedule policy

- **Any time before the meeting**: This means that Customers can reschedule any time before the scheduled meeting time. This can be a matter of minutes before the meeting. You can inform Customers that they will be charged a reschedule fee if they reschedule the booking. Note that payments are not collected automatically via OnceHub.
- **Up until a certain time before the meeting**: In this case, you can select how long before the scheduled meeting time the Customer can reschedule. The possible values range from 15 minutes to 14 days. You can inform Customers that they will be charged a reschedule fee if they reschedule the booking before or after the milestone. Note that payments are not collected automatically via OnceHub.
- **Never**: In this case, the Customer will never be able to reschedule the booking.

Note:

When you work with Session packages, Customers can reschedule each session independently and each session is subject to the Reschedule policy. In the **Payment and cancel/reschedule policy** section, you set the package price and the reschedule fee that Customers will be required to pay offline if they reschedule each session independently.

9. Define the **Reschedule policy description** that is visible to Customers on the Customer Cancel/reschedule page. By default, OnceHub generates an automatic text based on your selection. You use a custom text instead if you want to customize the Customer reschedule policy description.
10. Finally, in the **Reschedule policy** step you can also choose to ask your Customers to give you a reschedule reason. This question will be displayed on the Customer Cancel/reschedule page. You can choose to make the cancellation

reason **Mandatory**, **Optional**, or choose not to display the field at all by selecting **Don't ask**.

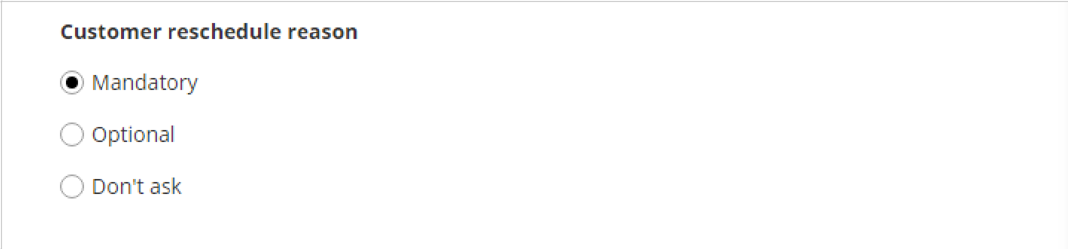


Figure 6: Customer reschedule reason

Congratulations! You've now set the Customer Cancel/reschedule policy that is displayed on the Cancel/reschedule page for your Event type.

Event type: Payment and cancel/reschedule policy when payment is collected via OnceHub

Last Modified on Oct 11, 2022

When you display a price for your Event type and collect payment via OnceHub, your OnceHub app is connected to PayPal and payments are collected automatically when Customers schedule or reschedule a booking.

Depending on your Refund settings, you can also enable OnceHub to automatically process refunds when Customers cancel a booking. This allows you to streamline your payment and refund processes and provide a seamless Customer experience.

In the **Payment and cancel/reschedule policy** section, you can automate the payment and refund processes that occur on the Customer Cancel/reschedule page. You can define the price the Customer pays for a booking and the refund amount that the Customer will receive if they cancel. You can also define the reschedule fee they will be charged if they reschedule.

In this article, you'll learn how to configure the Customer Cancel/reschedule policy when you display a price for your Event types and collect payment via OnceHub.

Customer Cancel/reschedule policy rules

The following rules apply to the Customer Cancel/reschedule policy:

- The Cancel/reschedule policy only affects your Customers. Users are not subject to the policy and they can cancel or reschedule at any time from the Activity stream.
- The Customer can always access the Customer cancel/reschedule link in Default email and calendar invite templates, regardless of the Cancel/reschedule policy. The policy will be reflected on the Customer Cancel/reschedule page that the Customer accesses via the Cancel/reschedule link. The policy will always reflect the settings that were saved at the time of the initial booking.
- When you use Payment integration, Booking with approval mode is not possible. You must work in Automatic booking mode. Learn more about conflicting settings when using Payment integration

Requirements

To configure the Customer Cancel/reschedule policy for your Event types, you must:

- Be a OnceHub Administrator.
- Have an active connection to your PayPal account.
- Work in Automatic booking mode.

Configuring the Customer Cancellation and Reschedule policy

Note:

When you work with Session packages, Customers can cancel each session independently and each session is subject to the Cancellation policy. In the **Payment and cancel/reschedule policy** section, you set the package price and the refund amount that Customers will receive if they cancel each session independently.

1. Go to **Booking pages** in the bar on the left.
2. In the **Event types** section, click on the Event type you want to edit.
3. Click the **Payment and cancel/reschedule policy** section (Figure 1).

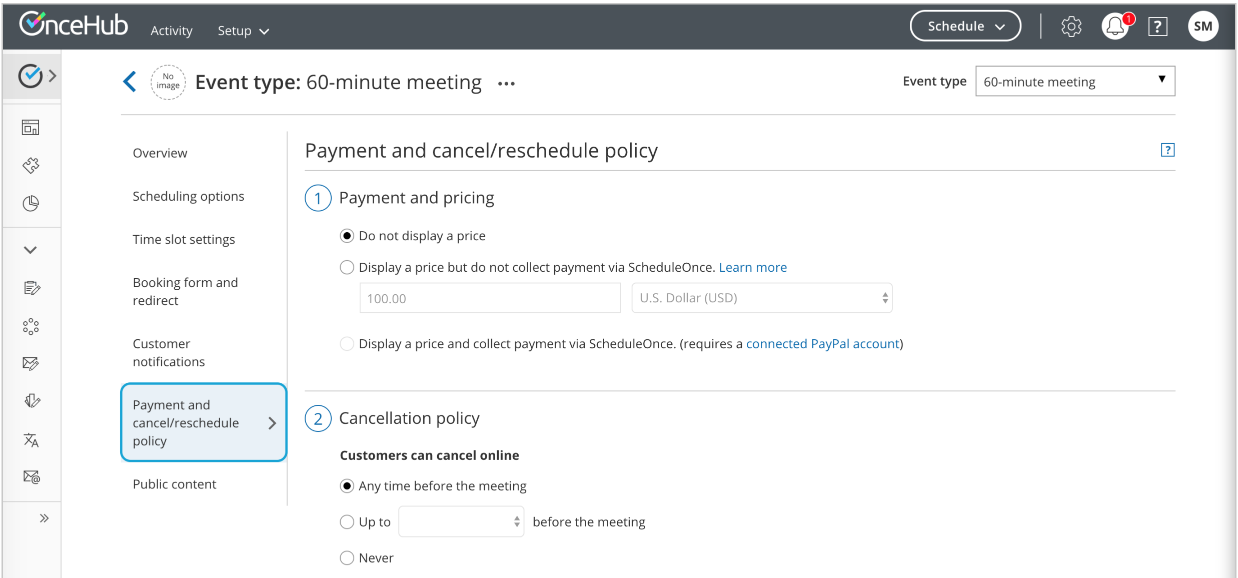


Figure 1: Payment and cancel/reschedule policy

4. In the **Payment and pricing** step, select **Display a price and collect payment via OnceHub** (Figure 2).

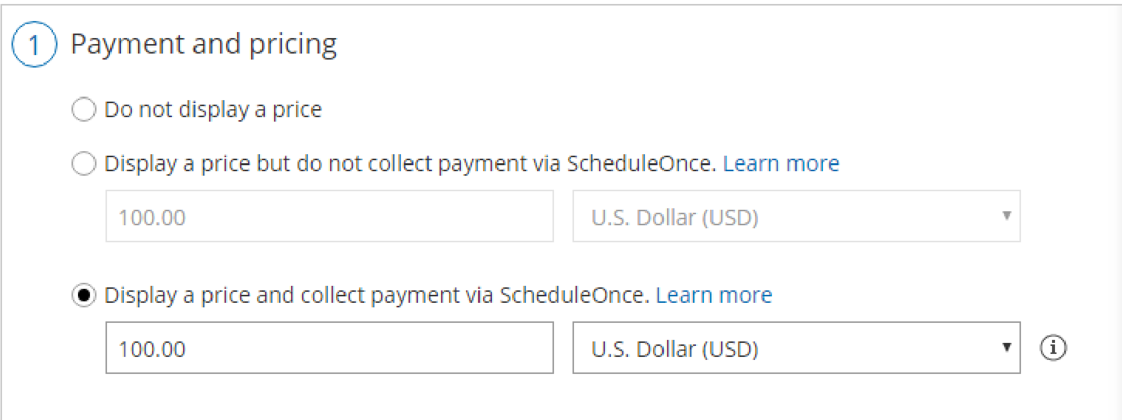


Figure 2: Payment and pricing step

5. In the **Cancellation policy** step (Figure 3), select your preferred option using the drop-down menu.

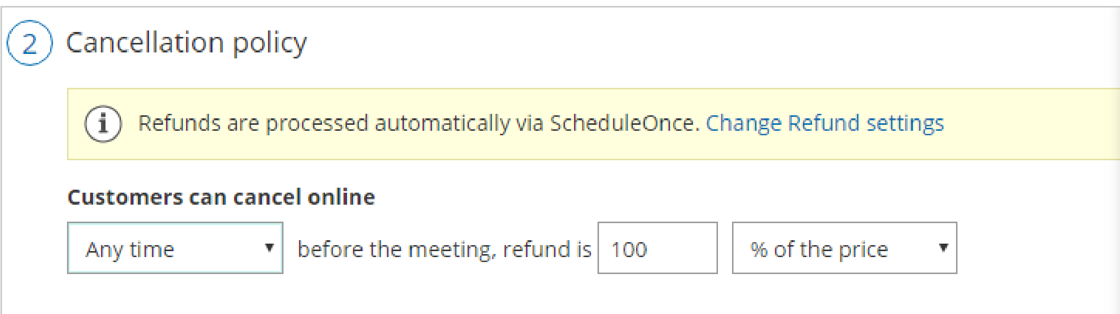


Figure 2: Cancellation policy

- **Any time before the meeting**: This means that Customers can cancel right before the scheduled meeting time. This can be a matter of minutes before the meeting. You can set the refund amount that the Customer will receive if they cancel the booking. Note that you can process refunds automatically via OnceHub if you set your Refund settings to **Automatic Enable manual and automatic processing of refunds via OnceHub**.

- **Up to a certain time before the meeting**: In this case, you can select how long before the scheduled meeting time that the Customer can cancel. The possible values range from 15 minutes to 14 days. You can set the refund amount that the Customer will receive if they cancel the booking before and after the milestone. Note that you can process refunds automatically via OnceHub if you set your Refund settings to **Automatic Enable manual and automatic processing of refunds via OnceHub**.
- **Never**: In this case, the Customer will never be able to cancel the booking.

6. In the **Cancellation policy** step, you can also define the **Policy description** that is visible to Customers on the Customer Cancel/reschedule page. By default, OnceHub generates an automatic text based on your selection. You can decide to use your own custom text instead if you want to customize the cancellation policy description.
7. Finally, in the **Cancellation policy** step you can also choose to ask your Customers to give you a **cancellation reason** (see Figure 4). This question will be displayed on the Customer Cancel/reschedule page. You can choose to make the cancellation reason **Mandatory**, **Optional**, or choose not to display the field at all by selecting **Don't ask**.

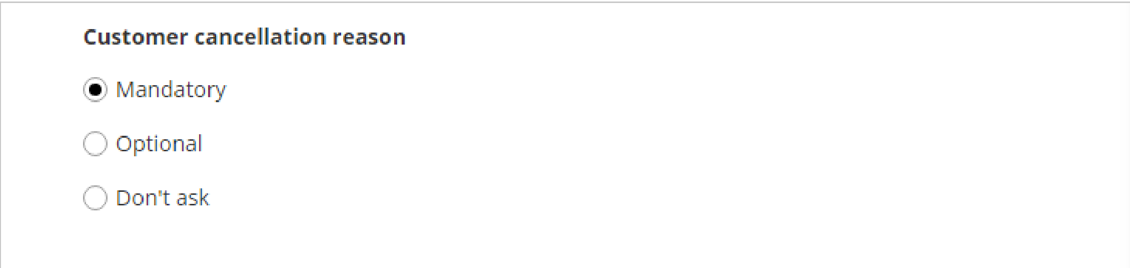


Figure 4: Customer cancellation reason

8. In the **Reschedule policy** step (Figure 5), you can select the following options using the drop-down menu.

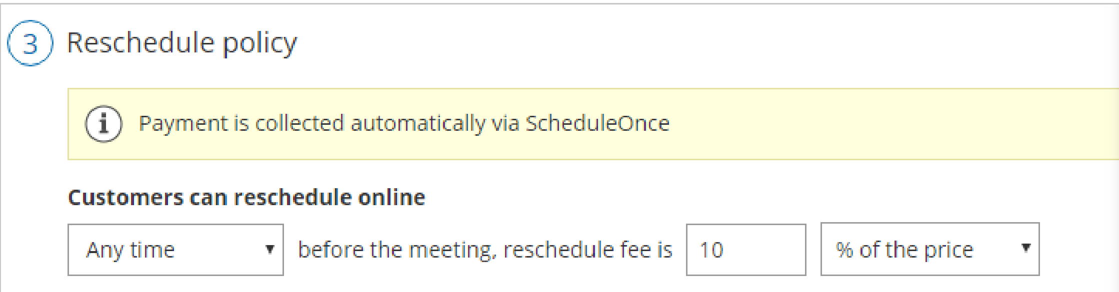


Figure 5: Reschedule policy

- **Any time before the meeting**: This means that Customers can reschedule right before the scheduled meeting time. This can be a matter of minutes before the meeting. You can set the Reschedule fee that you will collect automatically if the Customer reschedules the booking.
- **Up to a certain time before the meeting**: In this case, you can select how long before the scheduled meeting time the Customer can reschedule. Values range from 15 minutes to 14 days. You can set the Reschedule fee that you will collect automatically if the Customer reschedules the booking before or after the milestone.
- **Never**: In this case, the Customer will never be able to reschedule the booking.

> **Note:**
>
> When you work with Session packages, Customers can reschedule each session independently and each session is subject to the Reschedule policy. In the **Payment and cancel/reschedule policy** section, you set the package price and the reschedule fee that Customers will be required to pay if they reschedule each session independently.

9. In the **Reschedule policy** step, you can also define the **Reschedule policy description** that is visible to

Customers on the Customer Cancel/reschedule page. By default, OnceHub generates an automatic text based on your selection. You can decide to use your own custom text instead if you want to customize the Customer reschedule policy description.

10. Finally, in the **Reschedule policy** step (Figure 6) you can also choose to ask your Customers to give you a **reschedule reason**. This question will be displayed on the Customer Cancel/reschedule page. You can choose to make the cancellation reason **Mandatory**, **Optional**, or choose not to display the field at all by selecting **Don't ask**.

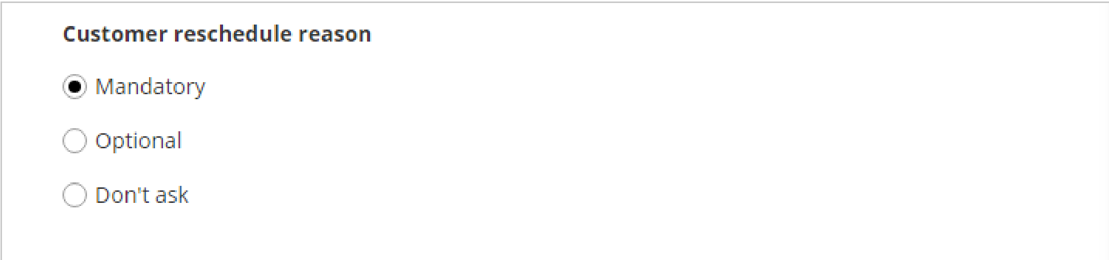


Figure 6: Customer reschedule reason

Congratulations! You've now set the Customer cancellation and Reschedule policy that is displayed on the Cancel/reschedule page for your Event type when you display a price and collect payment via OnceHub.

Event type: Public content section

Last Modified on Mar 3, 2021

The Public content section includes all the information that is available to your Customers when they book with you online.

Location of the Public content section

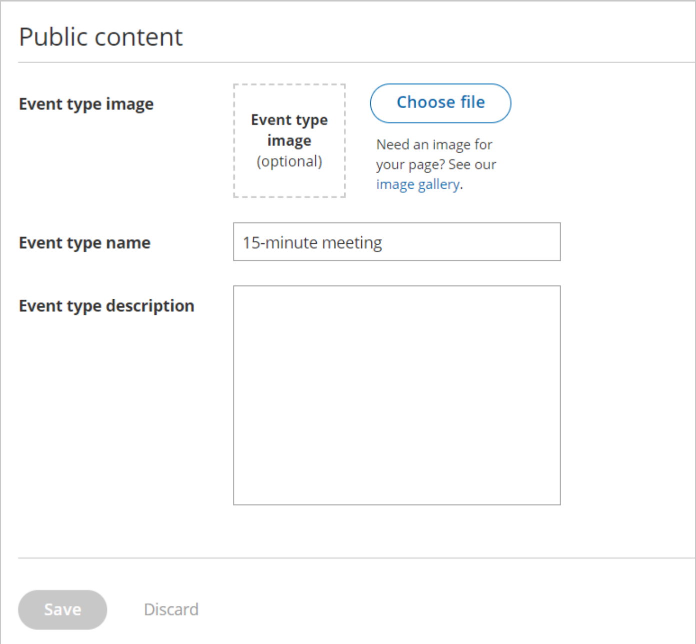


Figure 1: Public content section

Event type image

Upload an image in JPG, PNG or GIF format (max 200KB). It will be cropped or scaled to a 200 x 200 pixels rectangle as part of the upload process.

Event type name

You can use up to 75 characters, including spaces.

Event type description

You can enter up to 2,000 characters, including spaces.

The Event type description allows you to include HTML links.

For instance, adding this code in the Public content session:

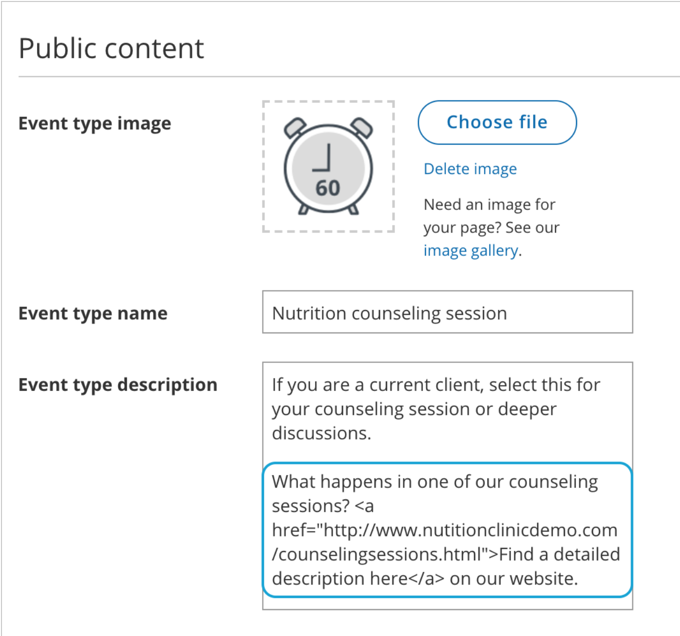


Figure 2: HTML link in the Event type description

Note:

Do not create a line break after **<a** at the start of the code. In the above graphic, it wraps to the next line automatically due to spacing. However, your entry should not have any extra line breaks.

...results in this link shown on the customer end:

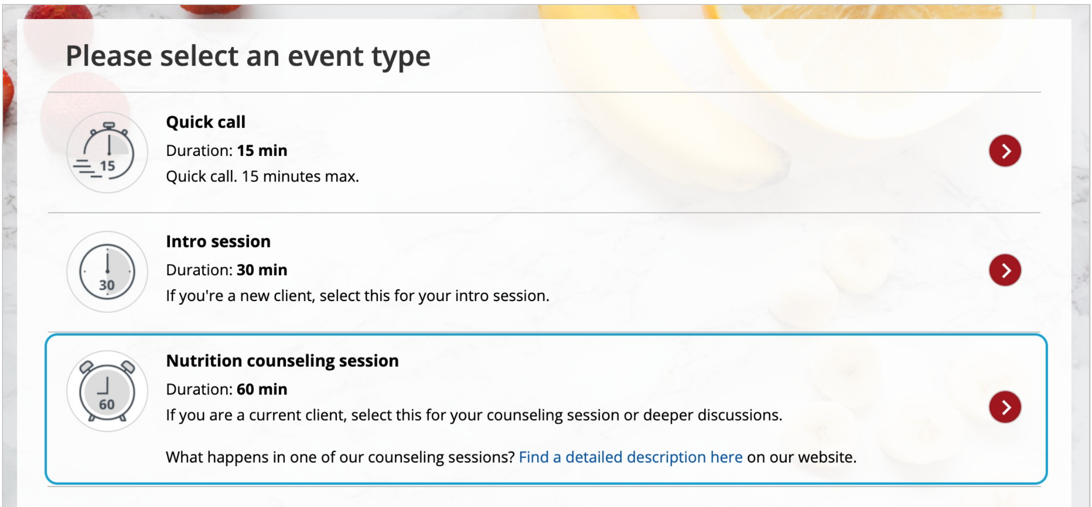


Figure 3: Event type description including HTML link

Duplicating an Event type

Last Modified on Oct 11, 2022

Duplicating Booking pages or Event types can save precious time for you when you're setting up and maintaining your OnceHub app. Duplication instantly clones all the settings associated with Event types, including images.

In this article, you'll learn how to duplicate an Event type.

Duplicating Event types

To duplicate an Event type, follow these steps:

1. Go to **Booking pages** in the bar on the left.
2. Click the action menu (3 dots) of the relevant Event type (Figure 1).

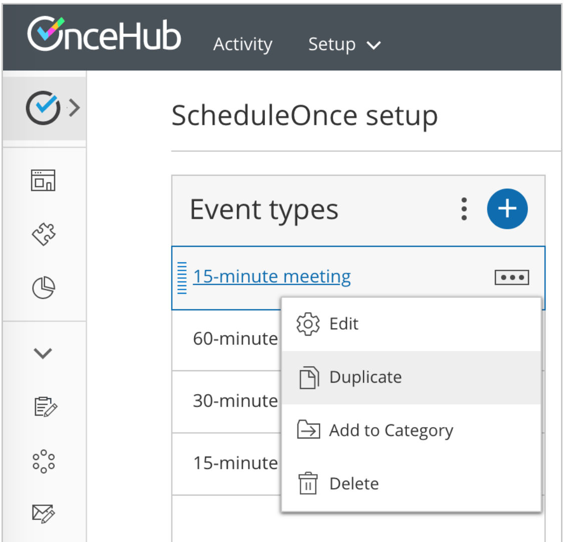


Figure 1: Individual Event type action menu

3. Select **Duplicate**.
4. In the new window, enter a **Public name** and add an image if desired.
5. Once you click the **Save** button, you're brought to the duplicated Event type settings.

Duplication rules

- Only Administrators have the permission to create or duplicate Event types.
- A new Event type inherits all settings from the source Event type.
- Association of Event types with Booking pages is **not** duplicated.
- Inclusion in Master pages is **not** duplicated.
- A new Event type appears just above its source Event type on the **Booking page scheduling setup** page, and under the same category.

Location of the Booking form and the Customer notifications sections

Last Modified on Oct 11, 2022

You can change the location of the Booking form and redirect section and the Customer notifications section to be within either the Booking page or the Event type.

In this article, you'll learn about the options for customizing the location of the Booking form and Customer notificiations section.

Customizing the location of the Booking form and Customer notifications section

1. Go to **Booking pages** in the bar on the left.
2. Click the action menu (3 dots) of the Event types section (Figure 1).

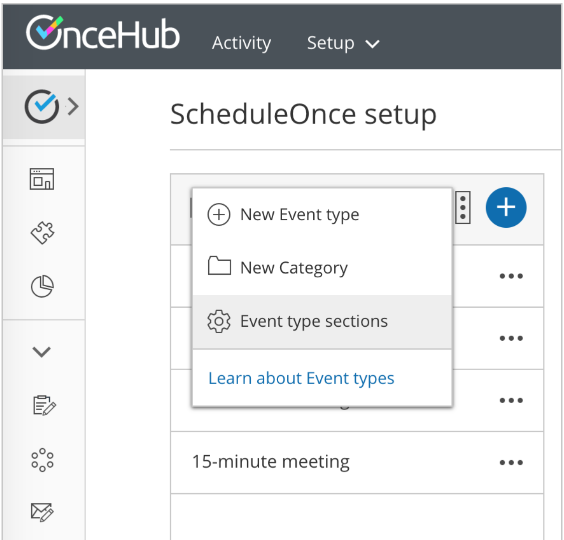


Figure 1: Event types action menu

3. In the drop-down menu, click **Event type sections**.
4. In the pop-up (Figure 2), you can select where you want the **Customer notifications section** and the **Booking form and redirect section** to be managed.

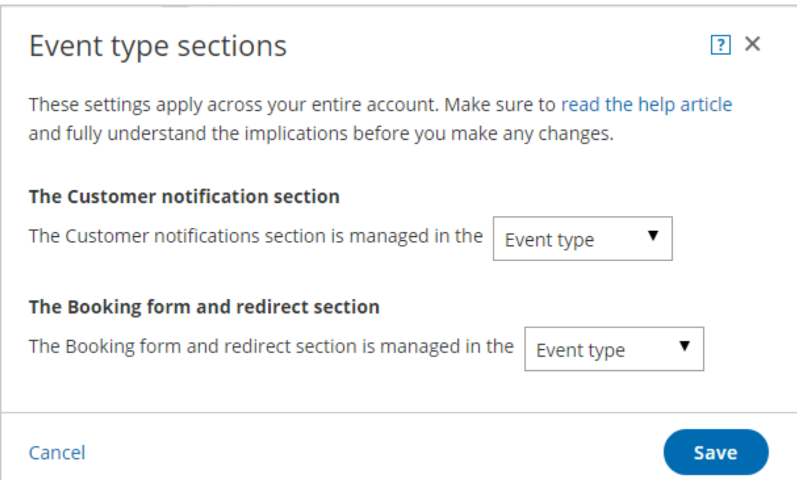


Figure 2: Event types sections popup

5. Click **Save**.

The option to customize the location means that Booking forms and Customer notifications can vary either by Booking page or by Event type. This additional flexibility enables better modeling of advanced scheduling scenarios and provides a better scheduling experience for your Customers.

Booking forms allow you to collect more information from your Customers when they make a booking. The information collected will be available from the Activity stream, Calendar events, and in all email communication to you and your Customers. Note that the Automatic redirect feature is also located in the **Booking form and redirect** section.

Customer notifications are automatic email notifications and SMS notifications sent to your Customers throughout the scheduling process. Customer notifications include scheduling confirmation, reminders, and follow-ups.

Option 1: Managing both sections on Event types

This solution is a great option for accounts that need to centralize the management of Customer notifications and Booking forms by Event types. This is the default location when Booking pages are associated with Event types (recommended).

For example, consider a multi-user account with multiple members providing coaching services in various locations. The Users can standardize and localize the online booking experience by managing Customer notifications and Booking forms at the Event type level.

Option 2: Managing both sections on Booking pages

This solution is a great option for accounts with multiple Users who need to customize the online booking experience for each individual User. This is the default location when Booking pages **are not associated** with Event types.

For example, external experts or consultants providing independent services can customize Customer notifications and Booking forms on their respective Booking pages. In this case, the Master page is used as a portal for the independent experts or consultants.

Option 3: Managing the Booking form and redirect section on Booking pages and the Customer notifications section on Event types

In this case, you want to standardize Customer notifications at the Event type level and independently manage Booking forms on your Booking pages. This allows each Booking page Owner to tailor the details for their own Booking form while keeping a consistent tone for all of your Customer notifications.

Option 4: Managing the Booking form and redirect section on Event types and the Customer notifications section on Booking pages

In this case, you want to standardize Booking forms at the Event type level and manage the Customer notifications independently on your Booking pages. This keeps a consistent tone for your Booking forms while allowing Users to provide different Customer notification scenarios depending on the Booking page.

Introduction to Booking pages

Last Modified on Oct 15, 2024

Booking pages are the basis of OnceHub's scheduling approach. They are pages through which bookings are made.

You can set up your Booking pages in different ways, based on your specific scheduling scenario. Each Booking page is completely independent in its settings. Booking pages can be used with or without Event types, and can be included in a Master page.

When included in a Master page, the availability of multiple Booking pages can be combined into one booking calendar. Learn more about Pooled availability

You do not need an assigned product license to configure and update Booking pages, though for some features, you do need to be an Administrator. Learn more

Booking page sections

Each Booking page contains the following sections, which you can customize for your scheduling requirements:

Overview

A summary of the Booking page's main properties. Here you can also enable or disable the Booking page with one click. Learn more about the Overview section

Scheduling options

Define your scheduling scenario in this section. Here you can decide:

- If you want to use Automatic booking or Booking with approval mode.
- If Customers will book single sessions or Session packages.
- If you want to offer one-on-one sessions or Group sessions.

Learn more about Scheduling options

Note:

When your Booking page is associated with Event types (recommended), the Scheduling options section is located on the Event type and not on the Booking page.

Time slot settings

Control how time slots are displayed to your Customers. You can use these settings to:

- Set the meeting duration.
- Control how often time slots are offered.
- Set limits on the available time presented to your Customer.
- Control time zone behavior.

Learn more about the Time slot settings

Note:

When your Booking page is associated with Event types (recommended), the Time slot settings are located on the Event type and not on the Booking page.

Recurring availability

Specify your availability pattern that repeats every week. Learn more about the Recurring availability section

Date-specific availability

Specify your availability for specific days if your availability differs on specific calendar dates, or if your availability pattern is highly variable from week to week. Learn more about the Date-specific availability section

Associated calendars

Control all the settings that relate to your connected Calendar. Learn more about the Associated calendars section

Conferencing / Location settings

Specify the type of meeting location you use: a virtual meeting or a face-to-face meeting. You can also choose whether it's set by the Owner or the Customer. Learn more about Conferencing / Location settings

Booking form and redirect

Set the meeting subject, choose the Booking form you wish to use, and decide what happens when your Customer submits the Booking form. Learn more about the Booking form section

Note:

The Booking form and redirect section can be located either on the Event type or the Booking page, depending on your Event type sections.

Customer notifications

Control the email and SMS notifications sent to your Customers, including scheduling confirmations, reminders, and follow-ups. Learn more about the Customer notifications section

Note:

The Customer notifications section can be located either on the Event type or the Booking page, depending on your Event type sections.

User notifications

Control the email and SMS notifications that you and any additional stakeholders will receive. The User notifications are independent of the Customer notifications. Learn more about the User notifications section

Cancel/reschedule policy

Define the time frame during which Customers are permitted to cancel and reschedule a booking, customize the policy description presented to Customers, and choose whether Customers should provide a cancellation/reschedule reason. Learn more about the Cancel/reschedule policy section

Public content

Provide information about the Booking page owner. This will be displayed to Customers when they make a booking. Here you can also set Tags, which are useful when you have a number of Booking pages combined under a single Master page. Learn more about the Public content section

Creating a Booking page

Last Modified on Oct 13, 2022

Booking pages are powerful and versatile pages through which bookings are made. Booking pages can be used with or without Event types, depending on your specific scheduling scenario.

OnceHub creates a new Booking page for every User you add. However, you may wish to add more pages to support your organization's needs. In this article, you'll learn how to create a new Booking page.

Requirements

To create Booking pages, you must be either a OnceHub Administrator or a Member with the permission enabled in your Profile.

You do not need an assigned product license to create a Booking page. Learn more

Creating a new Booking page

1. Go to **Booking pages** in the bar on the left.
2. Click the Plus button in the **Booking pages** pane. If you already have another Booking page similar to the one you're creating, it may be quicker to duplicate the existing Booking page.
3. The **New Booking page** pop-up appears (Figure 1).

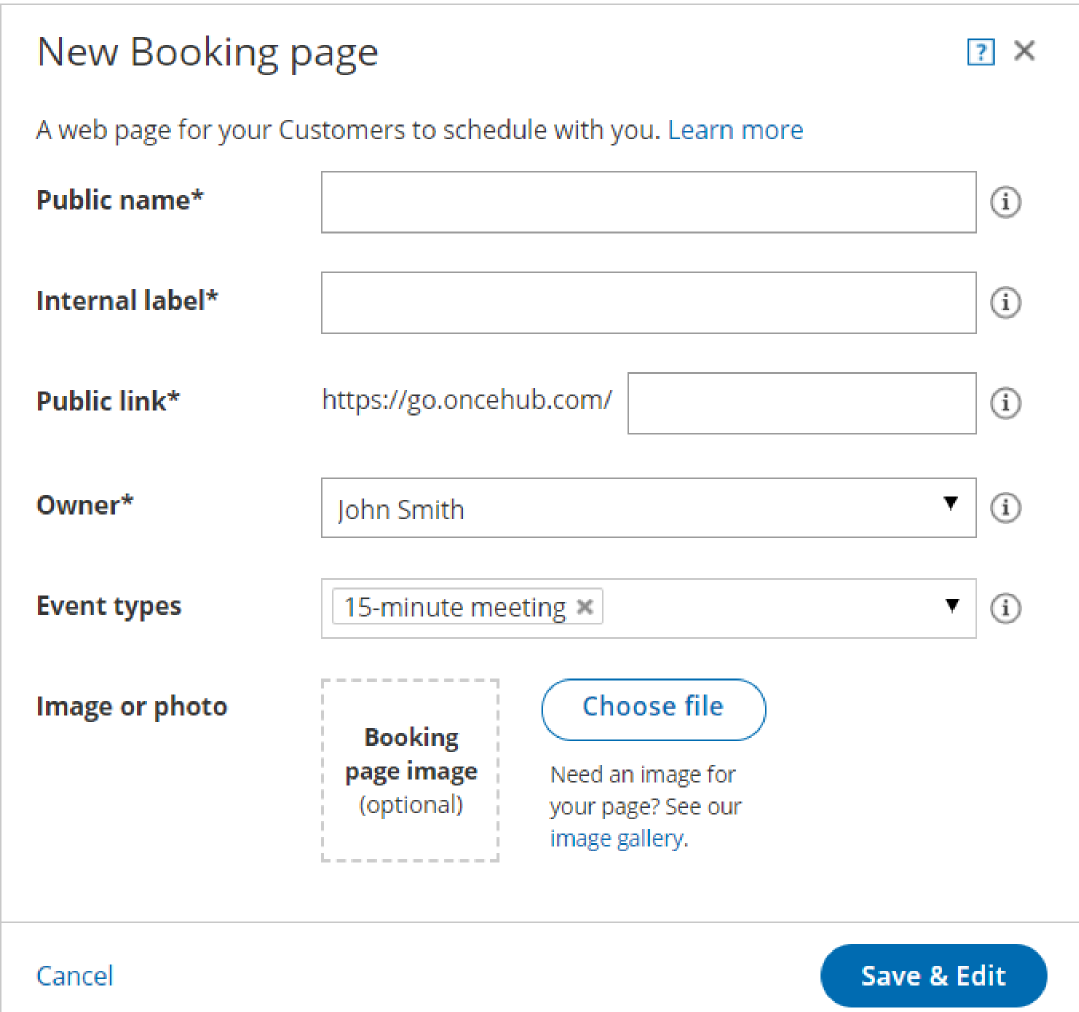


Figure 1: New Booking page pop-up

4. Define the properties for your Booking page.
   - **Public name -** The Public name is visible to Customers as the page title. It can be changed later in the Public content section.
   - **Internal label -** The Internal label is only visible internally and is not visible to your Customers. We recommend using a recognizable label because the Booking page will be identified with this label throughout our system. It can be changed later in the Overview section.
   - **Public link -** This is the link used by Customers to access the page. The Public link must be unique and include at least four characters. It can be changed later in the Overview section. The unique link extension you define can be added to any of our domains in order to share the link.
   - **Owner -** The Owner is the User who receives the bookings. Booking page ownership can be changed later in the Overview section or the Profile of the target User.
   - **Editors (optional) -** Editors are Users who can edit/view the page and receive User notifications. This feature is available in multi-User accounts only.
   - **Event types -** Event types are the meeting types offered to the Customer. We recommend associating your Booking page with at least one Event type. The association can be changed later in the Event types section of the Booking page.
   - **Image or photo (optional) -** You may add a photo or image to your page, which will be visible to Customers. It can be changed later in the Public content section.
5. Click **Save & Edit**. You will be redirected to the Booking page Overview section to continue editing your settings.

Booking page access permissions

Last Modified on Jun 2, 2023

Booking pages in a multi-User account are portable and shareable. This means they can be moved between User profiles and accessed by multiple Users. Additionally, any User in the account can choose to subscribe to email or SMS User notifications for a specific Booking page.

In this article, you'll learn about the different types of Booking page access permission.

Access permission levels

Access to Booking pages is determined by a User's **Access permission** for that specific page. There are four levels of permission that Users can have for a Booking page: **Owner**, **Editor**, **Viewer**, and **No access**. See below for more details on each level.

To edit Booking page access permissions, you must be a OnceHub Administrator. However, you do not need a license. Learn more

Editing Booking page access permissions

1. In OnceHub, click **Booking Pages** in the left-hand navigation bar.
2. Then, open the Booking page action menu (three dots) in the **Booking pages** pane (Figure 1).
3. Select **Booking page access**.

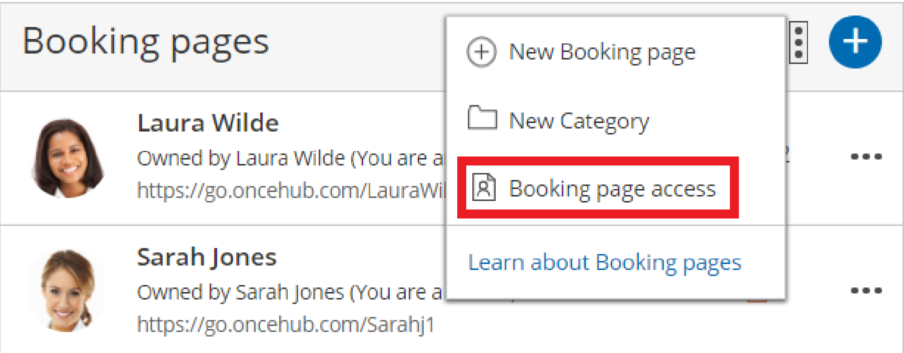


Figure 1: Booking page action menu

4. Use the **User** drop-down in the top right-hand corner to switch between Users. Use the **Access permission** drop-down to determine the User's access permissions for each Booking page in the account.

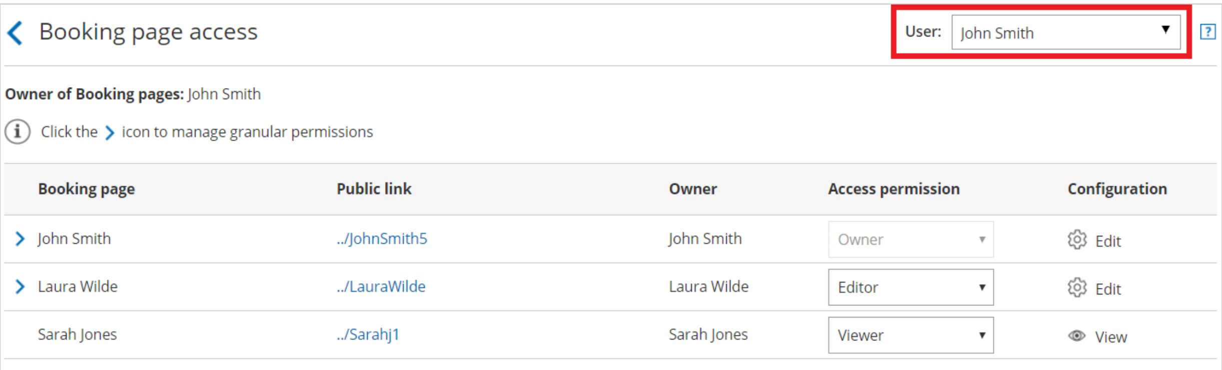


Figure 2: Booking page access

Alternatively, go to **Booking pages** in the bar on the left, then select the relevant Booking page → Overview section. Here you can edit the specific Booking page's Owner and Editor (Figure 3). This method is only possible if the Administrator is able to edit the specific Booking page.

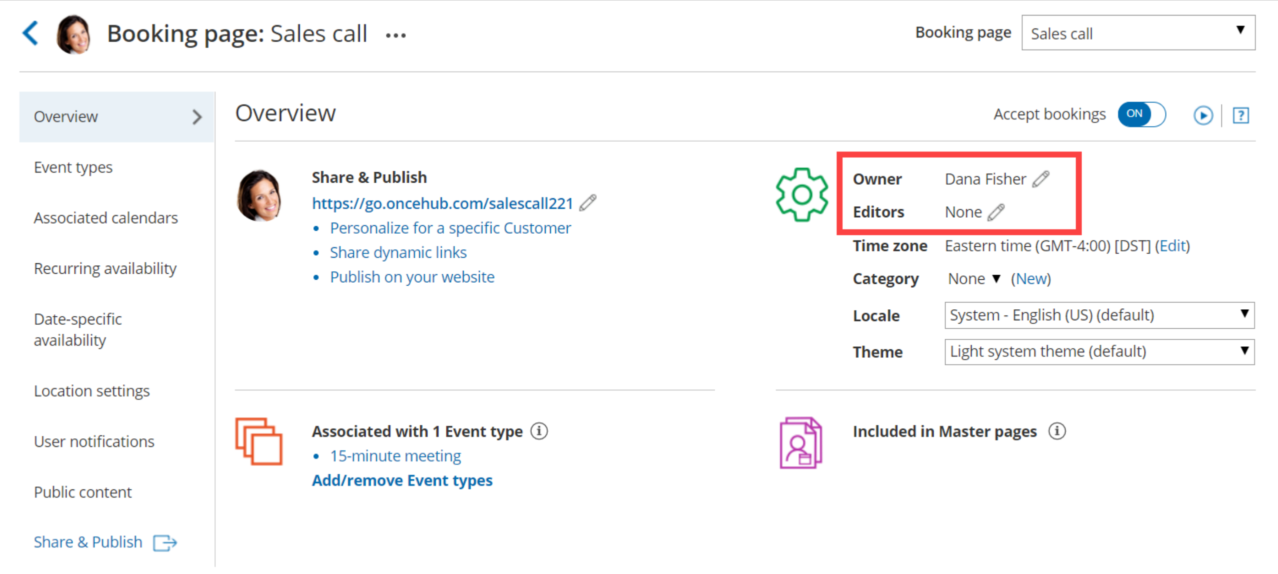


Figure 3: Edit the Owner and Editors in the Booking page Overview section

Note:

If you change the Owner of a Booking page, any User notifications settings you have previously customized for the Owner will be returned to the default settings for the new Booking page Owner.

Booking page access permission levels

There are four levels of permission that Users can have for a Booking page.

Owner

This level of permission is available for both Administrator and Member User roles. The Booking page Owner is the person who receives the bookings created via the Booking page. The Owner is the only User who can see the details of their calendar appointments. The Owner also receives the Booking page's activity in their Activity stream and is automatically subscribed to all email User notifications for that Booking page. There can only be one Owner for each Booking page.

- When using booking pages with a connected calendar, the booking is automatically created in the Owner's connected calendar.
- When using booking pages without a connected calendar, the Owner and any additional Editors can receive a scheduling confirmation email with a calendar event that can be manually added to the calendar.

You must be assigned a scheduled meetings license to be Owner of an enabled Booking page. Learn more

Learn more about Booking page ownership

Editor

This level of permission is available for both Administrator and Member User roles. By default, an Editor has almost complete access rights to the Booking page. An Editor also receives all activity for that Booking page in their Activity stream. An Editor can't view the detailed information of the appointments from the Owner's calendar in the Date-specific Availability section. The Editor can subscribe to all email and SMS User notifications for that Booking page.

You do not need an assigned scheduled meetings license to be Editor of a Booking page. Learn more

Viewer

Only Admins can have this access level and it is the default permission when an Administrator User is created.

Viewers can see all Booking pages, Event types, and Master pages on the **Booking pages setup** page. Viewers also receive all activity for all Booking pages in the Activity stream. Viewers can't edit the settings of Booking pages and don't receive booking notifications.

You do not need an assigned scheduled meetings license to be Viewer of a Booking page. Learn more

No access

This level of permission is available for Member User role only. With this access level, the specific Booking page won't show at all in the Member's account. Only Members can have this access level and it is the default permission when a new Member User is created.

Granular-level access permissions

In addition to the four access levels described above, you can define **granular-level (section-specific) access** (Figure 4) to Booking page sections. This applies to both Owner and Editor access levels. An Administrator editing a User profile can choose whether to grant that User read-only or editing privileges for all Booking page sections.

To edit these settings, go to the **Booking page access** section and click the > icon at the left of each row where the User is Owner/Editor.

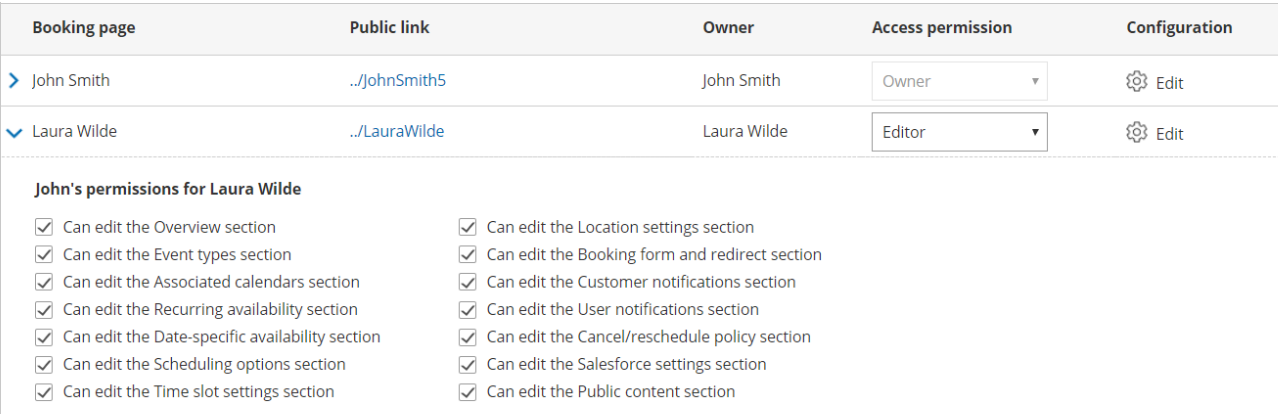


Figure 4: Granular permissions

Adding Event types to Booking pages

Last Modified on Oct 13, 2022

Event types are a powerful tool to standardize the meeting types that will be offered on different Booking pages. We recommend associating your Booking page with at least one Event type. This enables better modeling of advanced scheduling scenarios (for example, multi-User scenarios using Pooled availability) and provides a better scheduling experience for your Customers.

In this article, you'll learn about adding Event types to Booking pages.

Location of scheduling sections

When you associate Event types with Booking pages, some of your scheduling settings are related to the Event type and some are related to the Booking page.

The table below shows the settings that are related to each:

Event type	Booking page
Scheduling options	Associated calendars
Time slot settings	Recurring availability
Customer notifications	Date-specific availability
Booking form	Location settings
Payment and cancel/reschedule policy	User notifications
	Public content

Note:

If you prefer that the Booking form section and Customer notifications section are related to the Booking page, even when you are using Event types, you can change this in the Event type sections.

Requirements

To associate Event types with a Booking page, you must have permission to edit the Event types section of the Booking page.

Associating Event types

1. Go to **Booking pages** in the bar on the left. Create the Event types that you wish to use. Note that you can also duplicate existing Event types.

2. Select the relevant Booking page.
3. Select the **Event types** section of the Booking page. You will see a list of Event types you have created in your account (Figure 1).

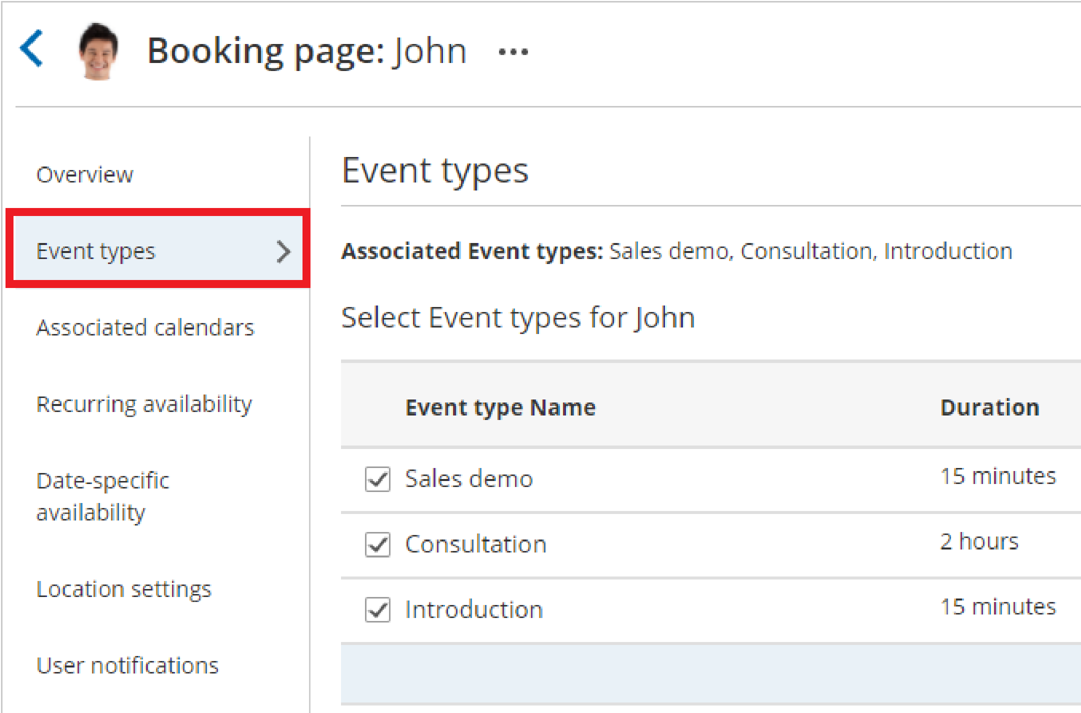


Figure 1: Event type section

4. Check the checkbox next to each Event type that you want to associate with this Booking page.
5. Click **Save**.

Booking page: Overview section

Last Modified on Apr 2, 2023

The Booking page Overview section summarizes the main properties of a specific Booking page. It includes the Booking page's main settings, the associated Event types, any Master pages it is included in, and share and publish options.

In this article, you'll learn about the Booking page Overview section.

To switch between the Overview sections of different Booking pages without returning to **Booking page scheduling setup**, use the shortcut drop-down in the top right corner. You can disable your page to stop accepting bookings, or enable it by clicking on the **Accept bookings** toggle on the top right.

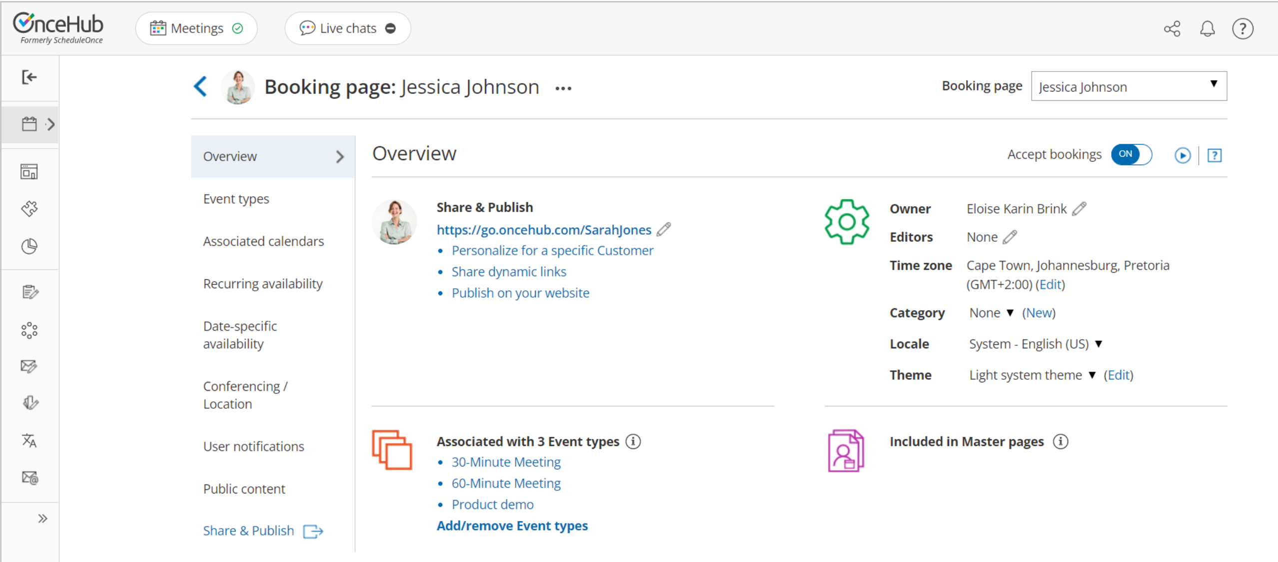


Figure 1: Booking page Overview section

Below you can find out more about the different parts of the Booking page Overview section.

Booking page primary settings

To access the Booking page primary settings, click the action menu (three dots) next to your Booking page name above the Overview section. In the drop-down menu, click **Primary settings.**

Alternately, you can click on the pencil (edit) icon next to the Booking page link, the **Owner** field or the **Editors** field.

To assign someone as Owner of an enabled Booking page, they must first be assigned a scheduled meetings license. Learn more

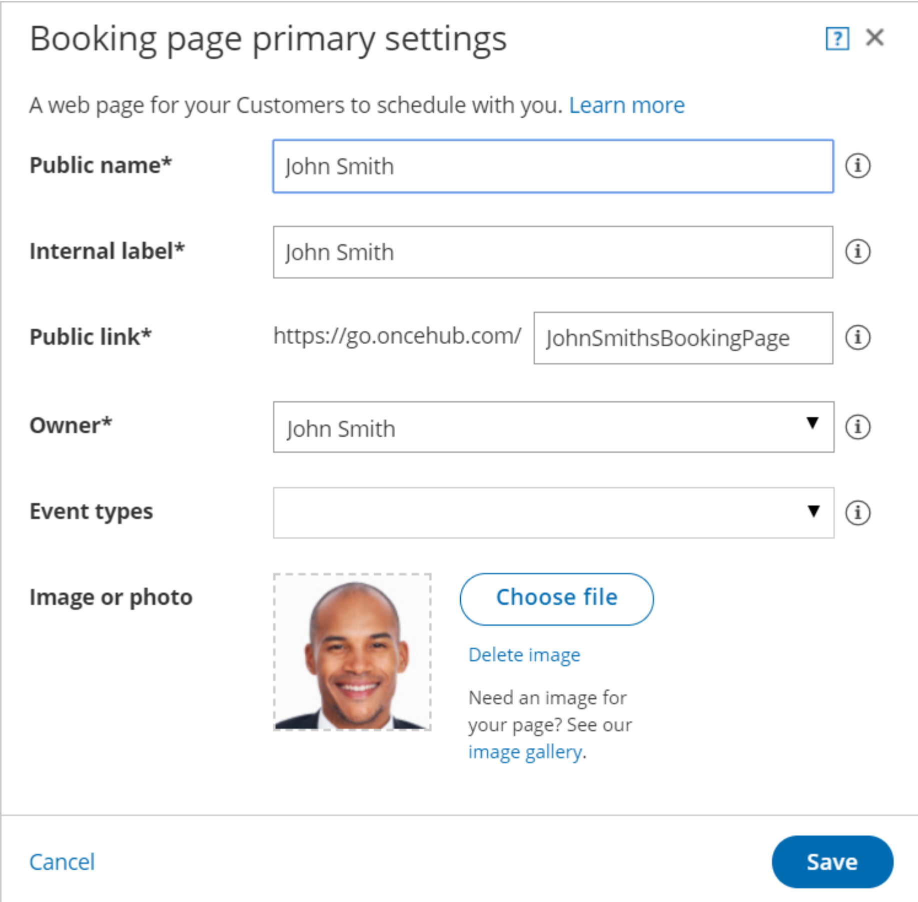


Figure 2: Booking page primary settings

In the **Booking page primary settings** pop-up, you can edit the following:

- **Public name:** The Public name is visible to Customers as the page title. It can be changed later in the Public content section.
- **Internal label:** The Internal label is only visible internally and is not visible to your Customers.
- **Public link:** This is the link used by Customers to access the page. The Public link must be unique and include at least four characters.
- **Owner:** The Owner is the User who receives the bookings.
- **Editors (optional):** Editors are Users who can edit/view the page and receive User notifications. This feature is available in multi-User accounts only.
- **Event types:** Event types are the meeting types offered to the Customer.
- **Image or photo (optional):** You can add or edit a photo or image to your page, which will be visible to Customers.

Sharing and publishing

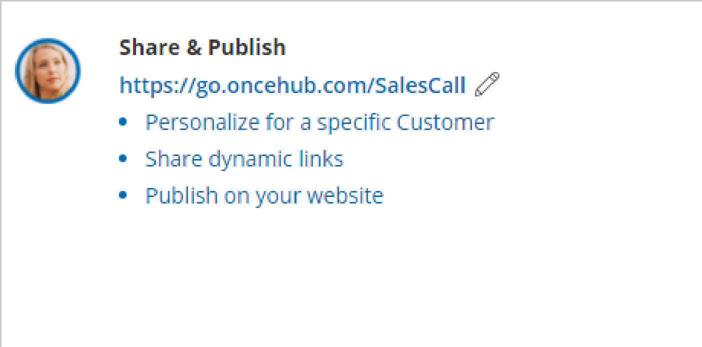


Figure 2: Share & Publish section

The **Share & Publish** section (Figure 2) contains the following:

- **Public link:** This is your page link that your Customers can use to schedule bookings with you. Learn more about Booking page links
- **Personalize for a specific Customer:** Creates a static link for a specific Customer. With this link, your Customer will be able to book without having to fill out their name and email. You create this type of link for each Customer individually. Learn more about creating a Personalized link

> **Tip:**
>
> You can use the OnceHub for Gmail extension to schedule with Personalized links directly from your Gmail account. You can generate Personalized links, copy them in a single click, and send them in an email.
>
> Learn more about OnceHub for Gmail

- **Share dynamic links:** Creates a dynamic link which you can share via your CRM or mass email campaign tool. Learn more about using Personalized links
- **Publish on your website:** Generates code that you can add into your website code so that you can integrate scheduling into your website. Learn more about publishing Booking pages on websites

Main settings

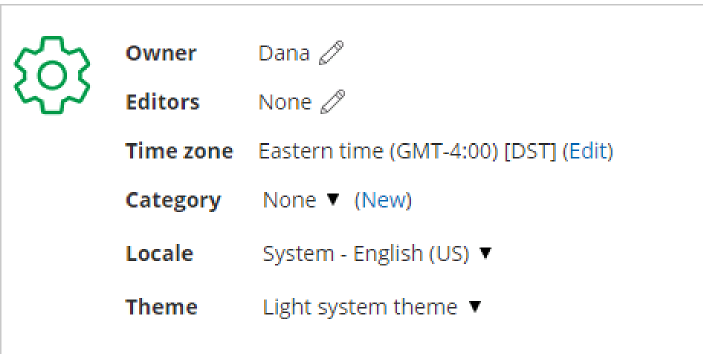


Figure 3: Main settings section

The **Main settings** section (Figure 3) contains the following:

- **Owner:** The Owner is the User who receives the bookings. Each Booking page has one Owner. Learn more about Booking page ownership
- **Editors:** Editors are Users who can edit/view the page and receive notifications. Any account Administrator or Member can be an Editor.
- **Time zone:** Usually, this is the time zone of the Owner or the location. If you're using calendar integration, the

Booking page time zone should be the same as the time zone of the connected calendar. Learn more about time zone settings

- **Category:** Categories organize Booking pages for you and your Customers. Learn more about categories
- **Locale:** The selected locale sets the date/format and the language of the page. Learn more about localization
- **Theme:** The theme you apply to the Booking page determines the logo, design and branding on your Booking page.

Associated Event types

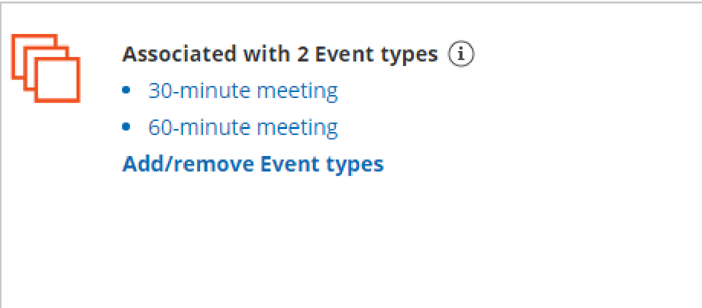


Figure 4: Associated Event types

Use this list to review the Event types that are associated with the Booking page. To edit an Event type, click on it in this list to navigate to it. We recommend associating your Booking pages with at least one Event type.

Adding Event types to a Booking page allows your Customer to choose between different meeting types when they book with you. If your Booking page is only associated with one Event type, your Customers will not need to choose a meeting type and they will bypass this step.

To associate an Event type with a Booking page, go to the Event types section of the Booking page.

Included in Master pages

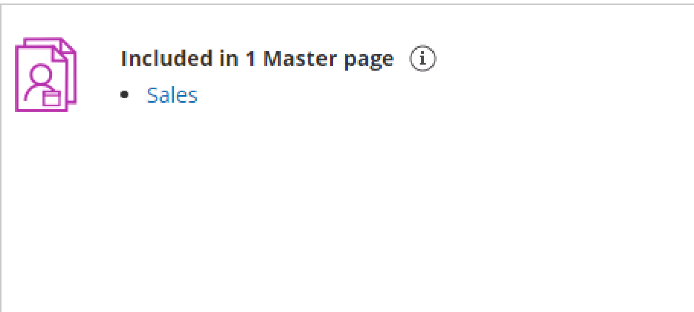


Figure 5: Included in Master pages

Booking pages can be included in Master pages to create a single point of access for your Customers. Use the list in this section to review the Master pages that include this Booking page. To edit a Master page, click on it in this list to navigate to it.

When a Customer schedules on a Master page, they either manually select a provider or they are automatically assigned a provider using pooled availability. In either case, the Customer will be able to schedule a booking using any of the Booking pages included in that Master page.

To include a Booking page in a Master page, go to the Assignment section of the Master page.

Booking page: Associated calendars section

Last Modified on Jun 15, 2023

The Associated calendars section is the heart of our integration with your calendar. To be able to configure the Associated calendars section of your Booking page, you need to connect a calendar.

Learn more about the benefits of connecting your calendar

Location of the Associated calendars section

To locate the Associated calendars section, go to **Booking pages**. Select the relevant **Booking page → Associated calendars**.

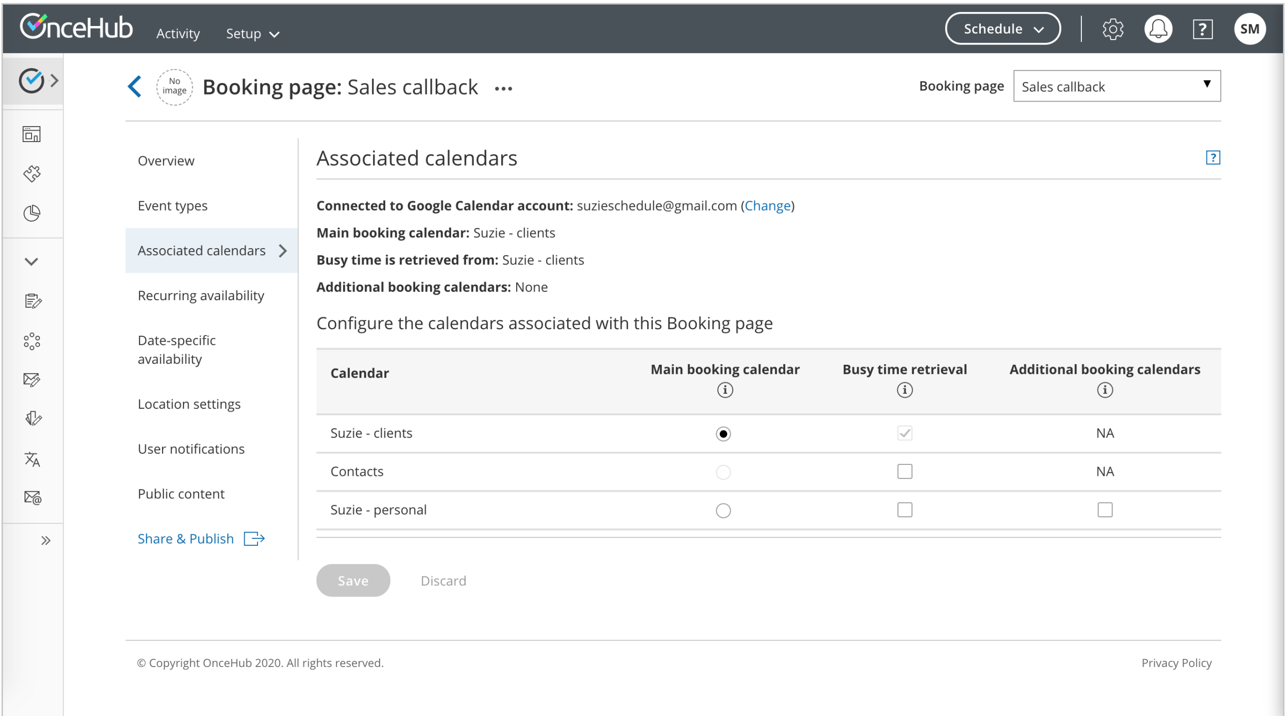


Figure 1: Booking page: Associated calendars section

You are able to use calendar settings from profile level or set associated calendars for the specific booking page you've selected.

If you have selected to set associated calendars for the specific booking page, you can set the following:

- The main calendar in which bookings are created
- One or more calendars from which busy time is retrieved
- Any number of additional calendars to which the calendar event from a new booking can be added.

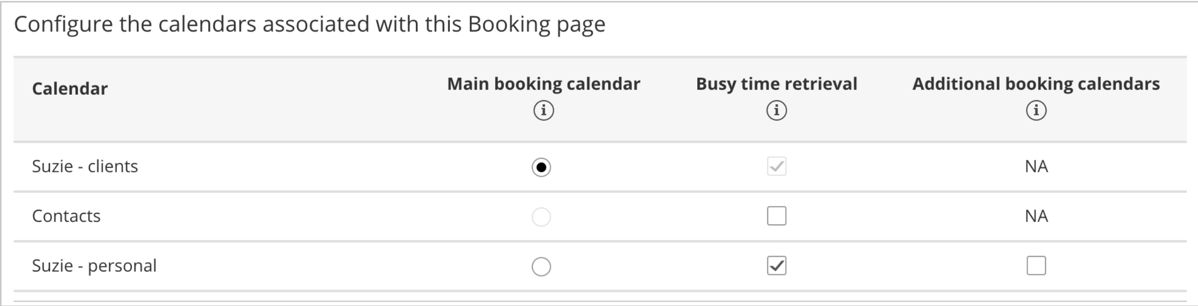


Figure 2: Choosing your associated calendars

Main booking calendar

The calendar events for your bookings are created in your main booking calendar. The **Main booking calendar** column lists all of the calendars in your account. These can be your own calendars or calendars that are shared with you, depending on the calendar that you are connected to. To be able to book in a main booking calendar, you need to have full read/write permissions for this calendar.

Busy time retrieval

The **Busy time retrieval** column is where you select the calendars that busy time is retrieved from. By default, busy time is always retrieved from the main booking calendar that your bookings are created in. Note that this can't be changed because it's necessary in order to ensure you don't get double-booked. It's also required in order to control the number of bookings per slot.

You can select any number of additional calendars in the **Busy time retrieval** column. These can be any calendars displayed in the list, with any level of permission: your calendars, calendars that others shared with you, or public calendars like a holiday calendar.

Additional booking calendars

The **Additional booking calendars** column is where you select the additional calendars where events will automatically be added to. Note that if the additional booking calendar is a third-party calendar feed, it can't accept bookings.

There are two possible scenarios when you use an additional booking calendar:

- **The additional booking calendar is a calendar that you own in your connected calendar account.** In this case, the calendar event will be created in the calendar and you will not receive a calendar invite.
- **The additional booking calendar is shared with your connected calendar account:** In this case, the calendar event will be created in the shared calendar. Also, the calendar Owner can receive a calendar invite if the calendar invite is enabled in the Customer notifications section. In addition, Owners of shared calendars can configure their calendar to notify them when a booking is made.

FAQs

- **Why is busy time not blocking my availability on my booking pages?**
  There may be a number of reasons, depending on your Booking page settings and the calendar that you've connected to. Learn more about troubleshooting Booking page issues with busy time and how Oncehub uses your calendar's busy time.
- **Why are all-day events not blocking my availability on my booking pages?**
  By default, all day events are set to "Available" or "Free" in your calendar. You should open the event in the calendar and change its status to “Busy." If this does not help, you can try some other solutions from our article

on troubleshooting Booking page issues with busy time.

- **Why am I receiving a settings conflict when attempting to select a calendar for busy time retrieval?**
  This is because you're also using the Group sessions setting in the Scheduling options section.

Booking page: Recurring availability section

Last Modified on Jun 2, 2023

Availability is always managed per Booking page. Availability settings on one Booking page are separate from the availability settings on another Booking page. OnceHub uses two types of availability: Recurring availability and Date-specific availability.

You can use Recurring only, Date-specific only, or both. Recurring availability is defined on a weekly basis, allowing you to create a pattern that repeats every week.

You do not need an assigned product license to access and update the Recurring availability section, though you do need the right Booking page access permissions. This means an assistant or other collaborator can update your availability on your behalf, without paying for an extra license. Learn more

In this article, you'll learn about using the Recurring availability section.

When to use Recurring availability

Recurring availability is best to use if your availability is consistent from week to week. This is especially true if you have connected your calendar and you use busy times to block out your availability.

If you have exceptions to your Recurring availability, you can use Date-specific availability to edit your availability without changing your weekly pattern. Date-specific availability overrides Recurring availability, and can be used to reduce or increase your availability.

Requirements

To edit the **Recurring availability** section, you must be an Owner or Editor of the Booking page with the permission enabled in your Profile.

Editing the Recurring availability section

1. Go to **Booking pages** in the bar on the left.
2. Select the relevant Booking page.
3. Click on the **Recurring availability** section of the Booking page (Figure 1).
   The default weekly recurring availability is set between 9 AM and 5 PM based on the Booking page time zone. Note that only a weekly pattern without dates is displayed. Busy time from your connected calendar is not shown.

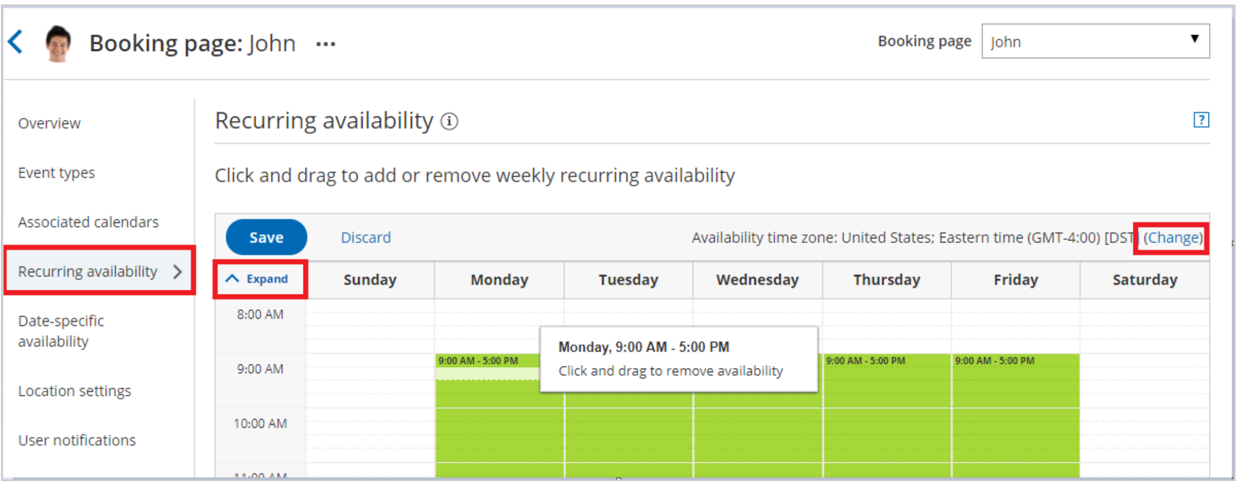


Figure 1: Recurring availability section

4. To update the time zone for this entire Booking page, click the time zone **Change** link (Figure 2). Note that your connected calendar must be set to the same time zone.

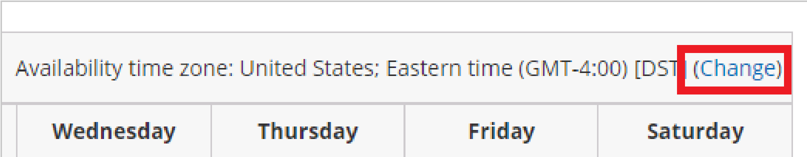


Figure 2: Change time zone

5. To modify the hours displayed in the grid, click **Expand** and define your preferences (Figure 3).

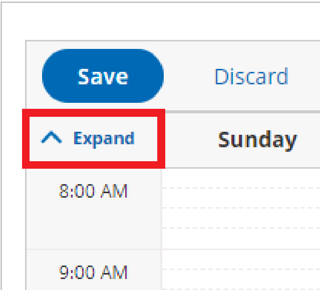


Figure 3: Expand hours

6. To add availability, click and drag over white (unavailable) slots, to mark them green (Figure 4). This will increase your availability for all weeks.

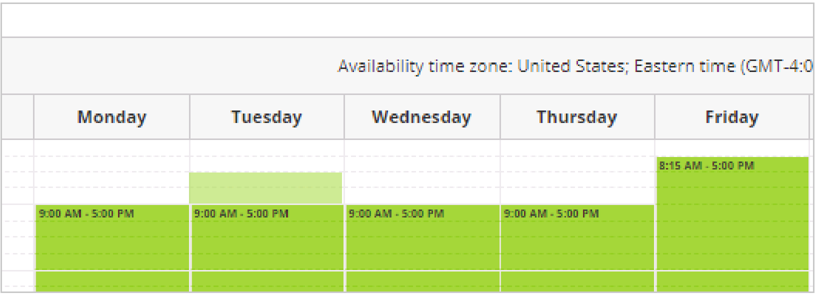


Figure 4: Adding availability

7. To remove availability, click and drag over green (available) slots, to mark them white (Figure 5). This will reduce your availability for all weeks.

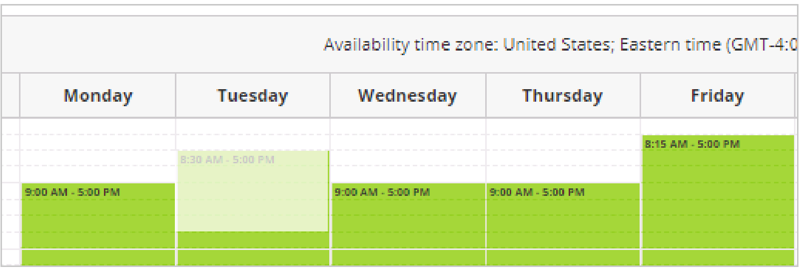


Figure 5: Removing availability

8. Click **Save**.

Booking page: Date-specific availability section

Last Modified on May 15, 2023

Important:

We recommend always updating your availability with User availability, located on your User profile. This article is only relevant for those who need an individual Booking page to reflect different availability from their standard User availability. Learn more

When you define availability for a specific Booking page rather than through your User profile, you can use two types of availability: Recurring availability and Date-specific availability. Date-specific availability is defined for specific days so that you can designate your availability for each calendar day.

You do not need an assigned product license to access and update the Date-specific availability section, though you do need the right Booking page access permissions. This means an assistant or other collaborator can update your availability on your behalf, without paying for an extra license. Learn more

In this article, you'll learn about using the Date-specific availability section.

When to use Date-specific availability

If your scheduling is limited to specific days, or if your availability pattern is highly variable from week to week, it may be best to use Date-specific alone. This is the most precise method, but it requires more maintenance.

Using Date-specific availability can also be a good solution if your calendar is not connected and busy times cannot block out your availability.

Your Recurring availability weekly pattern will serve as a basis for your Date-specific availability. Any changes that you make in your Date-specific availability will apply to the edited days only. Date-specific availability will always override your Recurring availability on those dates.

Adjusting your availability

You can used Date-specific availability to reduce or increase your availability:

- **Increase availability:** Use Date-specific availability to add availability on top of Recurring availability. For example, if you were on vacation on a certain week, the week after the vacation you could make up for it by making yourself available until late in the evening.
- **Reduce availability:** Use Date-specific availability to block parts of your Recurring availability. For example, you normally work Mon-Fri as a repeating pattern, but you need to block off two specific dates due to a business trip. You could remove availability for those two dates on the Date-specific availability calendar.

Requirements

To edit the Date-specific availability section, you must be an Owner or Editor of the Booking page with the permission enabled in your Profile.

You must toggle **OFF** User availability by opting not to use the Booking page owner's recurring availability, located at the top of the section.

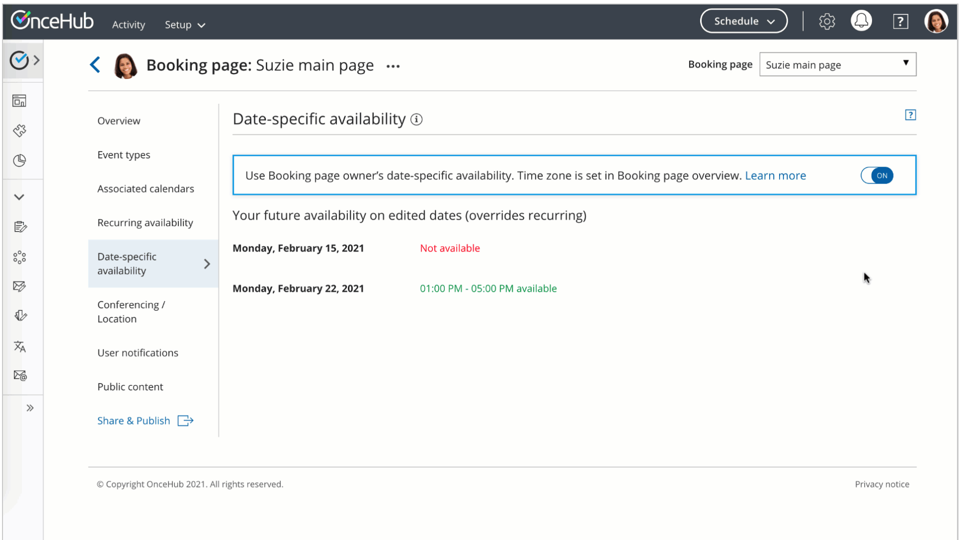


Figure 1: Toggle off User availability

How to edit Date-specific availability:

1. Go to **Booking pages** in the bar on the left.
2. Select the relevant Booking page.
3. Click on the **Date-specific availability** section of the Booking page (Figure 1).
   The default Date-specific availability is displayed based on your Recurring availability in the Booking page time zone.
   Note that busy time retrieved from your connected calendar will appear in blue blocks on the Date-specific availability grid.

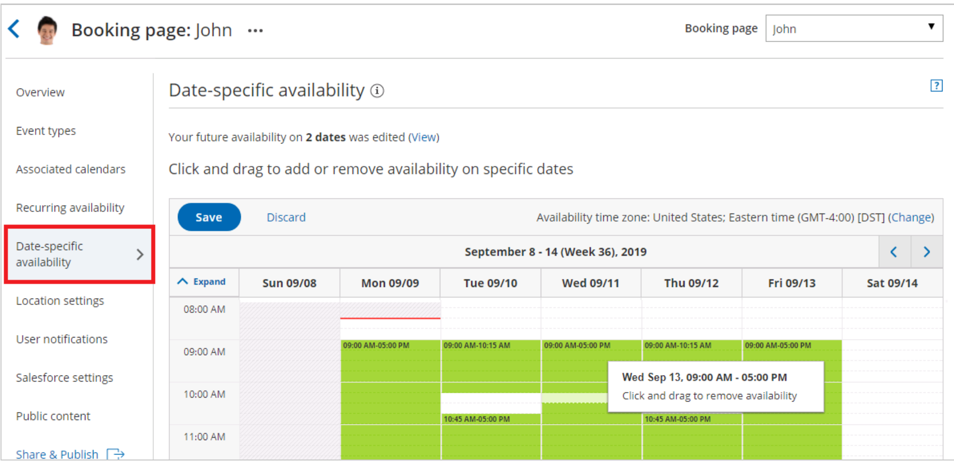


Figure 2: Date-specific availability section

4. To update the time zone for this entire Booking page, click the time zone **Change** link (Figure 2). Note that your connected calendar must be set to the same time zone.

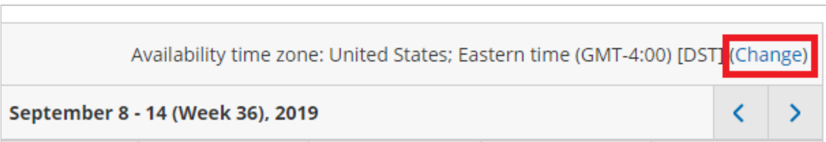


Figure 3: Change time zone

5. To modify the hours displayed in the grid, click **Expand** and define your preferences (Figure 3).

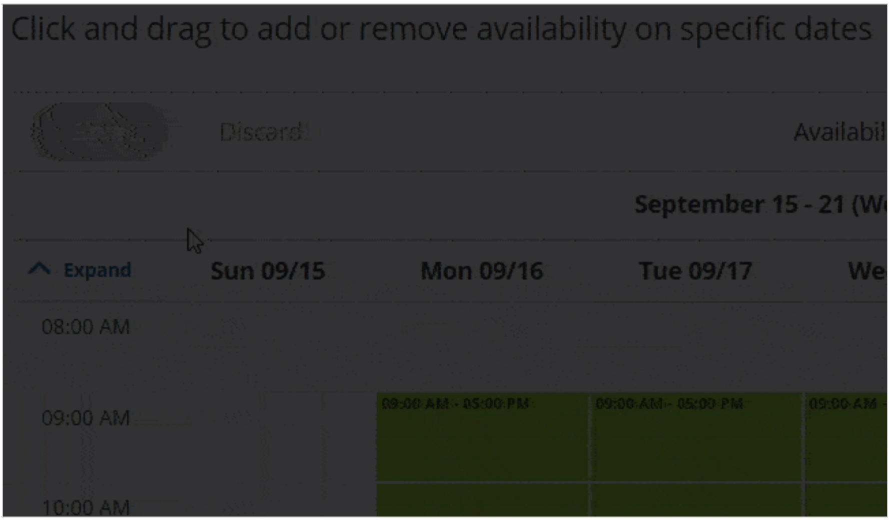


Figure 4: Expand hours

6. To see previous or future weeks in the grid, click the arrows at the top right corner (Figure 4).

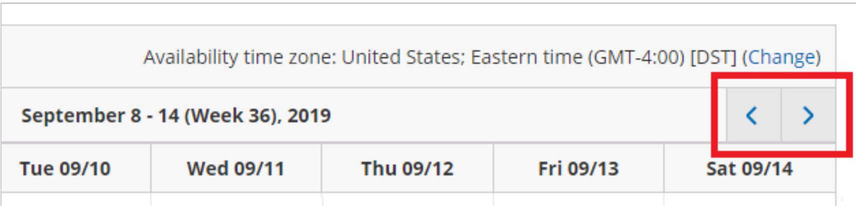


Figure 5: Select week

7. To add availability, click and drag over white (unavailable) slots, to mark them green (Figure 5). This will increase your availability for this date only.

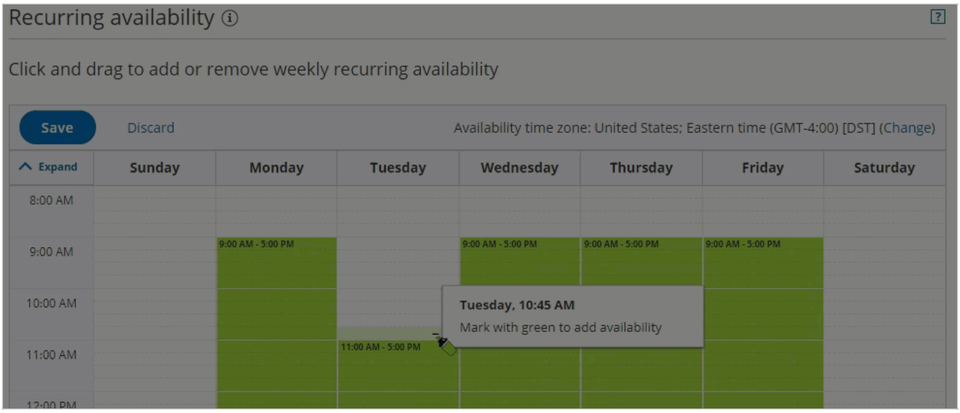


Figure 6: Adding availability

8. To remove availability, click and drag over green (available) slots, to mark them white (Figure 6). This will reduce your availability for this date only.

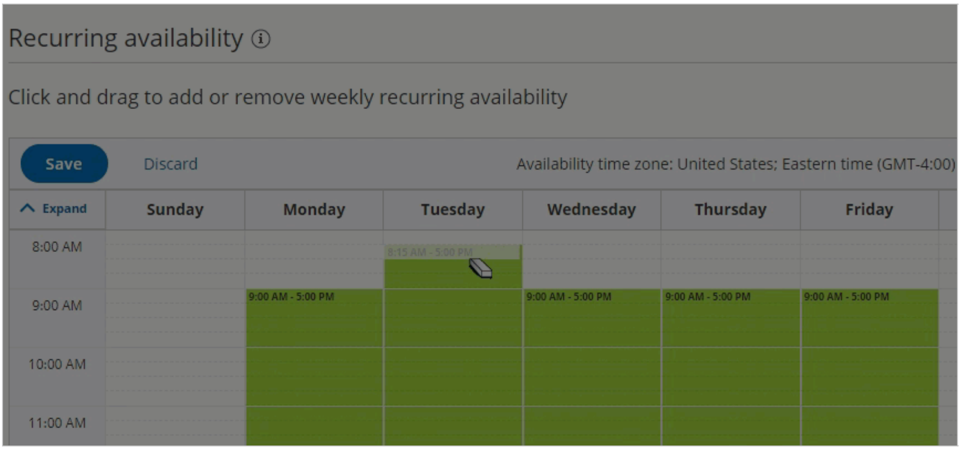


Figure 7: Removing availability

9. Review your Date-specific availability by clicking the **View** link (Figure 7).

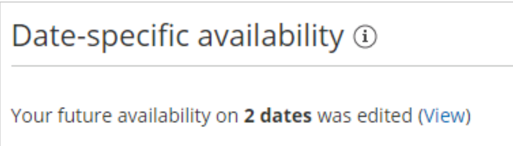


Figure 8: View link

10. Click **Save**.

Booking page: Location settings section

Last Modified on Oct 13, 2022

In the **Conferencing / Location** section of your Booking page, you can decide whether or not to use a meeting channel.

In this article, you'll learn about setting up the **Conferencing / Location** section.

Accessing the Conferencing / Location section

To access this section, go to **Booking pages** in the bar on the left. Select the relevant **Booking page -> Conferencing / Location** (Figure 1).

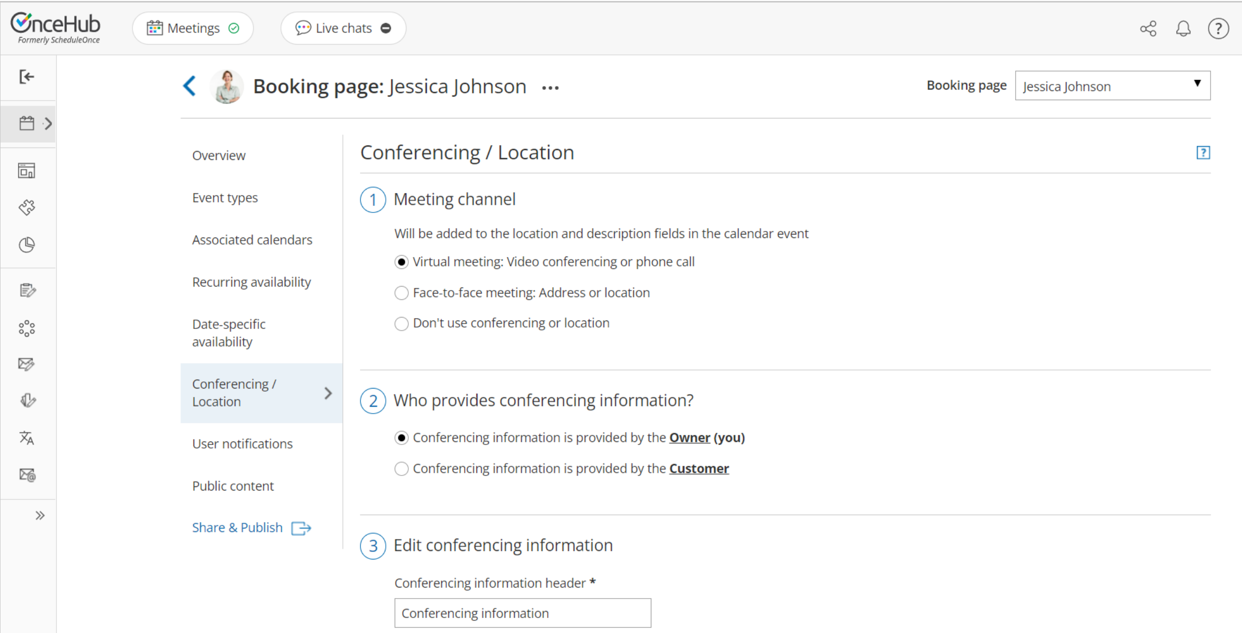


Figure 1: Conferencing / Location section

Conferencing / Location options

If you decide to set a meeting channel, the Booking page **Conferencing / Location** settings allow you to specify four types of locations for the meeting. The four different options are explained in the sections below.

Virtual location provided by you

In this case, the meeting is virtual and conducted over the phone or via audio or video conferencing. In the **Edit conferencing information** step, you should enter the details that the Customer needs in order to connect to the conference (Figure 2).

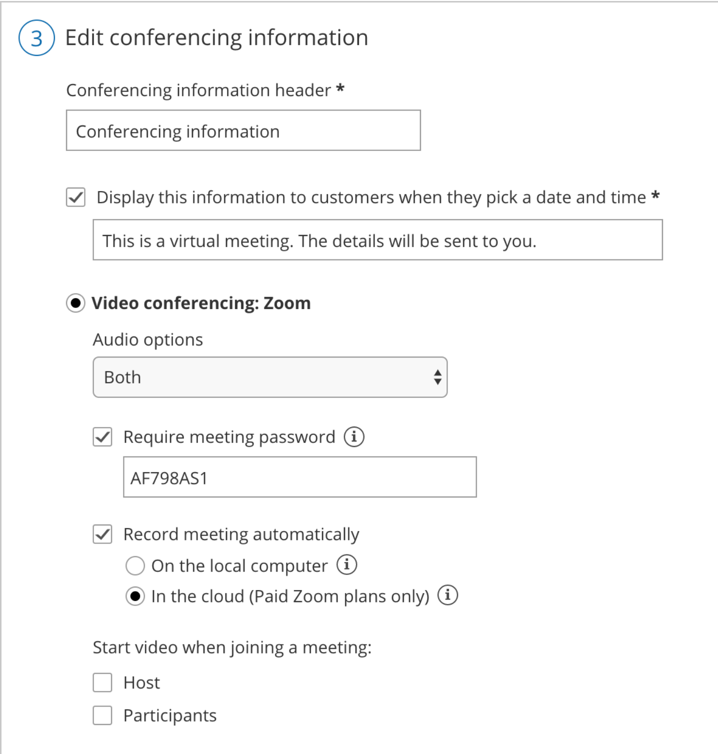


Figure 2: Edit conferencing information

You can provide your own video conferencing details, or integrate your account with one of our native video conferencing integrations: Zoom, Google Meet, Microsoft Teams, GoToMeeting, or Webex Meetings.

When the Customer makes a booking, they will be notified that this is a virtual meeting (Figure 3), and they will receive all connection details in the scheduling confirmation email and calendar invite.

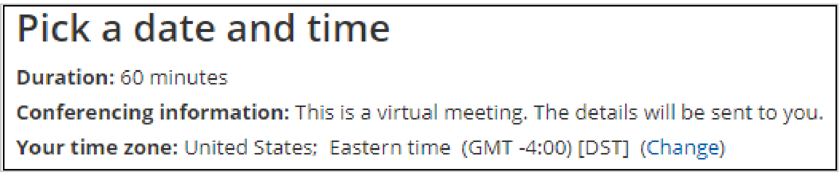


Figure 3: Conferencing information when a virtual location provided by you

Virtual location provided by the Customer

In this case, the meeting is virtual and conducted over the phone or via audio or video conferencing. However, conferencing information for the meeting is provided by the Customer and not by you.

When the Customer makes a booking, they will be notified that this is a virtual meeting and they will be providing the conferencing information (Figure 4).

The information that the Customer provides will then be available in the scheduling confirmation email and calendar invite.

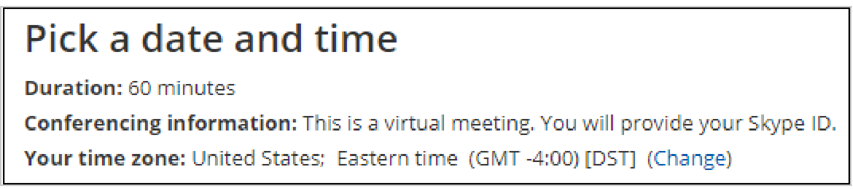


Figure 4: Conferencing information when virtual location provided by the Customer

Information displayed to Customers when they select a date and time

This setting allows you to control the text that displays in the **Pick a date and time** step when Customers select a time on your Booking form. This information is important, as the meeting location may impact the Customer's time selection. For example, if the Customer knows that this is a virtual meeting, they may want to have it sooner rather than later. They'll also know that they don't need to plan for travel time.

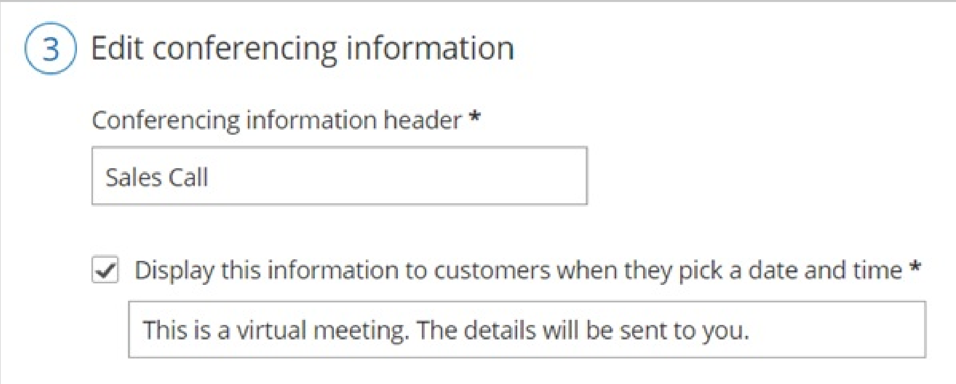


Figure 5: Date and time information

Physical location set by you

In this case, the location is a physical address. You can choose to show the Customer the location with a link to a map in the **Pick a date and time** step of the Booking form (Figure 6). The Customer will be able to take this information into account when they select a booking time.

To display the location information on the Booking form, check the box marked **Show the header and address when customers select a date and time** (Figure 7).

Figure 6: Location details when the physical location set by you

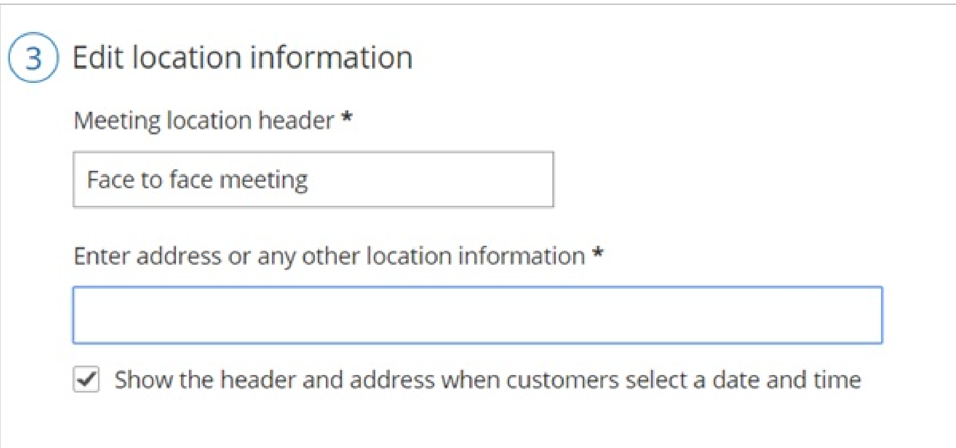
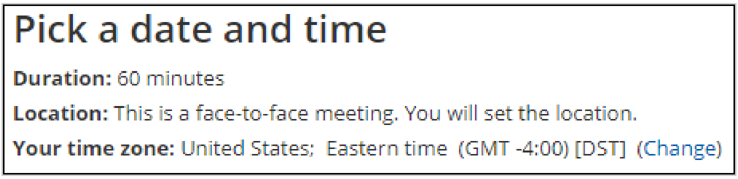


Figure 7: Entering the physical meeting information

When the Customer makes a booking, the location details will be available in the scheduling confirmation email and calendar invite.

Physical location set by the Customer

In this case, the location is an input field that the Customer must provide information for. You can choose to tell the Customer in the **Pick a date and time** step that they need to provide a location (Figure 8). They will be able to take this information into account when selecting a time.



To display the location information on the Booking form, check the box marked **Display this information to customers when they select a date and time** (Figure 9).

Figure 8: Location details when the physical location is set by the Customer

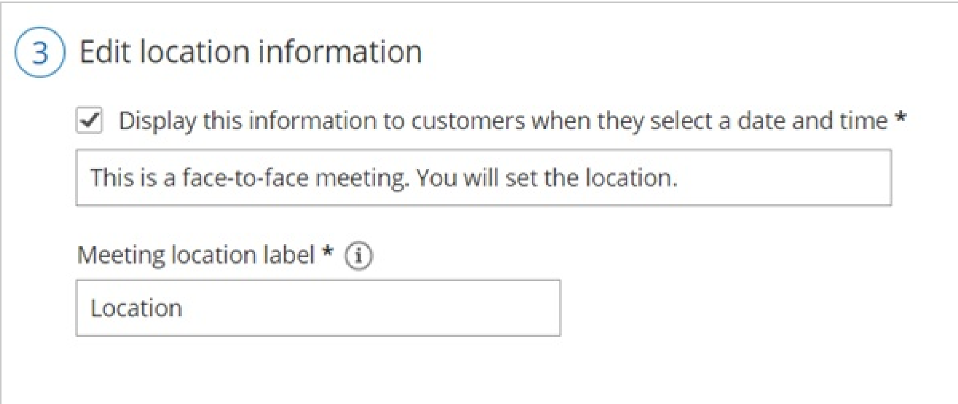


Figure 9: Location information when the Customer provides the location

The location the Customer provides will then be available in the scheduling confirmation email and calendar invite.

The Meeting location header

The Meeting location header is used to name the location field. The header will be available in all places where the location is displayed, including communication emails and calendar events.

Booking page: Public content section

Last Modified on Jun 2, 2023

The **Public content** section is where you enter information to help Customers understand what your Booking page is for. You can enter basic information about yourself or your staff member, your meeting type, location, and write a welcome message to the Customers who schedule time with you. You can also add tags that enable your Customers to filter Booking pages grouped in a Master page.

The Public content you add is used when your page is in Enabled status as well as in Disabled status. When you disable your page, you can keep the Public content section as is or change it to display a different message.

Location of the Public content section

To access this section, go to **Booking pages** in the bar on the left. Select the relevant **Booking page → Public content** section (Figure 1).

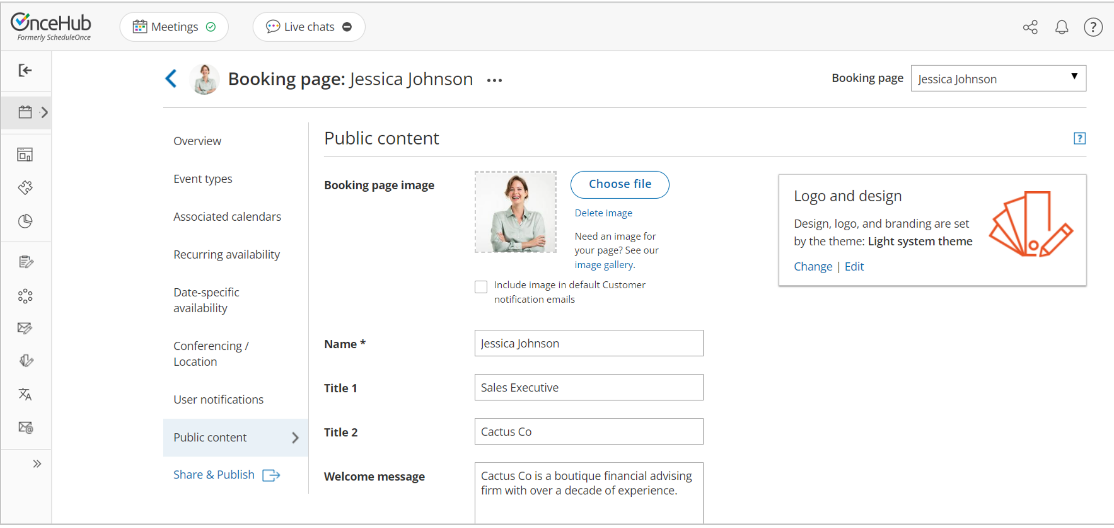


Figure 1: Public content section

Public content features

Add a Booking page image

You can add your photo or any other image. For best results, upload an image in JPG, PNG or GIF format (max 200KB). It will be cropped or scaled to a 200 x 200 pixels rectangle as part of the upload process. If you check the checkbox marked **Include image in default Customer notification emails**, the image will be included in all relevant Customer notifications such as email confirmations (Figure 2).

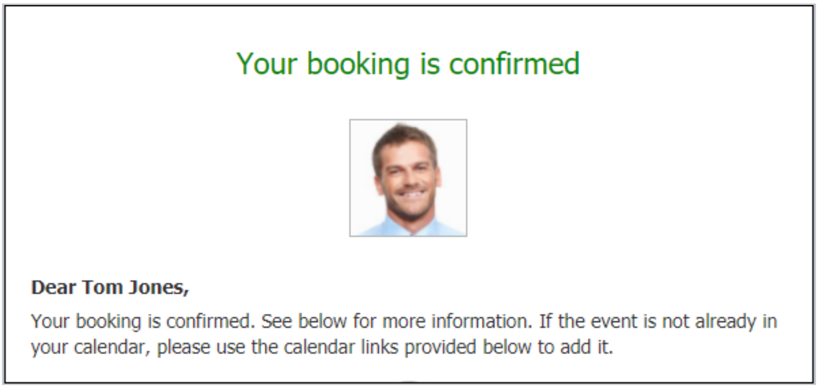


Figure 2: Customer notification email

> **Note:**
>
> Booking pages created before December 20th 2015 will have this option turned off by default. If you want to enable it for your existing booking pages, you can simply check the **Include image in default Customer notification emails** checkbox.

Add a Name

Choose the name of your page here. It can be your name, your organization's name, or the type of meeting your Customers are booking.

Add Titles

You can enter subheadings to the name of your page.

Add a Welcome message

You can enter up to 2,000 characters with spaces.

The welcome message can include hyperlinks (clickable URLs). The Welcome message also allows you to include HTML links.

For instance, adding this code in the Public content session:

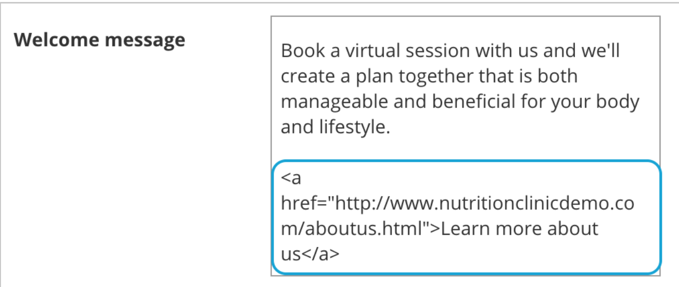


Figure 3: HTML link in the Event type description

> **Note:**
>
> Do not create a line break after **<a** at the start of the code. In the above graphic, it wraps to the next line automatically due to spacing. However, your entry should not have any extra line breaks.

...results in this link shown on the customer end:

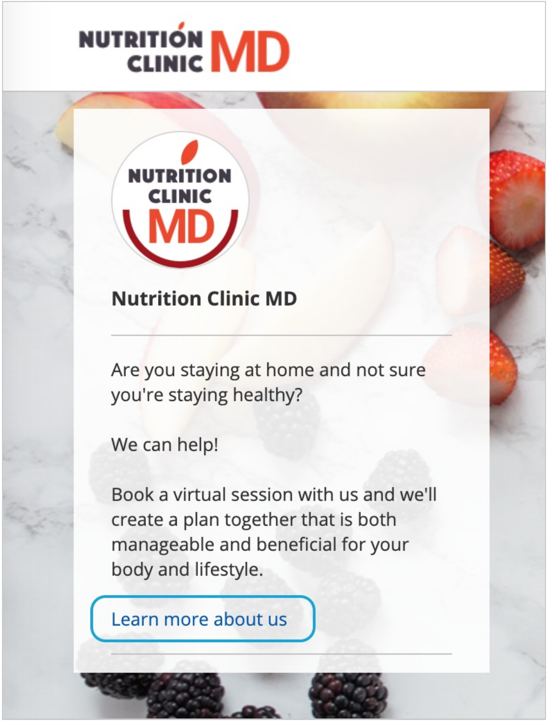


Figure 4: Event type description including HTML link

Add Phone and Email

Enter a phone number and email address for your Customers to contact you.

Add a Website link

Enter a URL to reference your organization's website or another relevant site you want to provide to Customers booking with you. The link entered will also automatically make the header logo at the top left of the Booking form clickable, directing to the same URL.

Add social media links

Add a Twitter link

Copy and paste your full Twitter URL. It can be a personal or company handle, and must start with https://twitter.com/

Add a LinkedIn link

Copy and paste your full LinkedIn URL. It can be a personal or company profile, and must start with https://www.linkedin.com/

Add a Facebook link

Copy and paste your full Facebook URL. It can be a personal or company page, and must start with https://www.facebook.com/

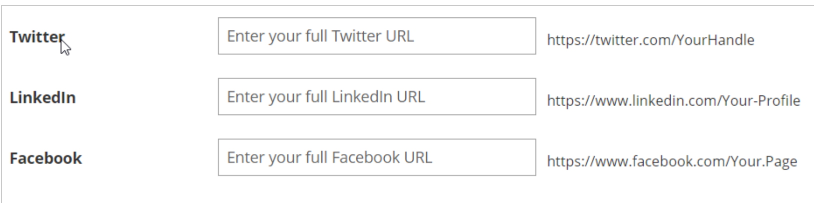


Figure 5: Social media options

Note:

By default, the customer-facing interface also includes OnceHub branding in the left pane of your Booking page; for instance, "Powered by OnceHub." You can adjust this according to your preference in your OnceHub account **Settings** page. Learn more

Tags sub-section

In this sub-section, you add tags to your Booking page by entering keywords separated by a comma (Figure 4). The maximum character limit per tag is 25. Tags can be very useful when you group Booking pages under a Master page.

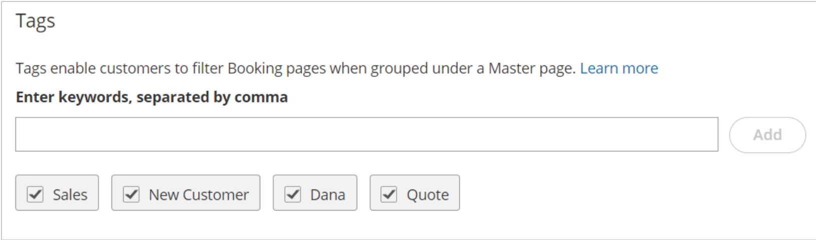


Figure 6: Using tags

This enables you to add a new filtering dimension to your Booking page. For example:

- When OnceHub is used for scheduling meetings in conferences, trade shows and other events, attendees can filter the host list by host properties.
- When OnceHub is used for room and resource scheduling, Customers can filter the room list by room properties.
- When you're offering multiple providers for a service, you can use tags as another level of organization to allow Customers to find providers with the skill(s) they need, such as language fluency.

When you add a tag to a Booking page, the box for the tag is checked by default. The added tag is also made available in all Booking pages in your account. When you edit the **Public content** section of a different Booking page, you'll be able to see that added tag and check it.

Note:

In order to improve tag management, a tag that is not checked in at least one Booking page will not be saved in the system and will be automatically deleted.

Disabling your Booking page

Last Modified on Jun 15, 2023

To disable a Booking page, go to the Booking page's Overview section and toggle the On/Off switch in the top right corner (Figure 1).

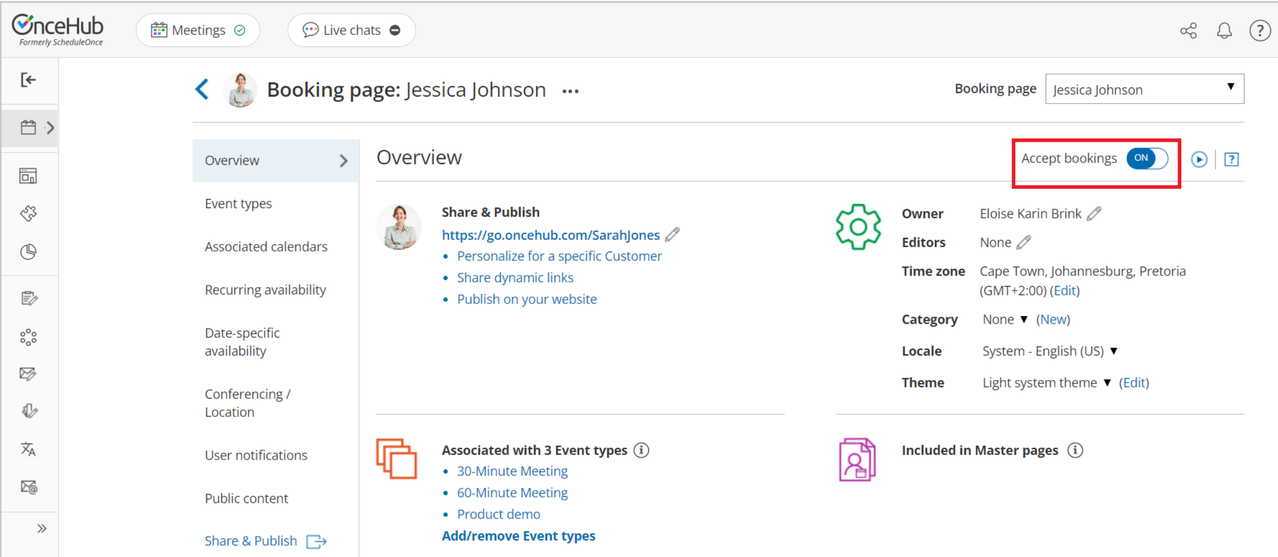


Figure 1: Booking page Enable/Disable toggle

Alternatively, you can completely delete the Booking page by going to **Booking pages** in the bar on the left, clicking the action menu ••• of the relevant Booking page, and selecting **Delete** (Figure 2). In the **Delete Booking page** popup that opens, click **Yes**.

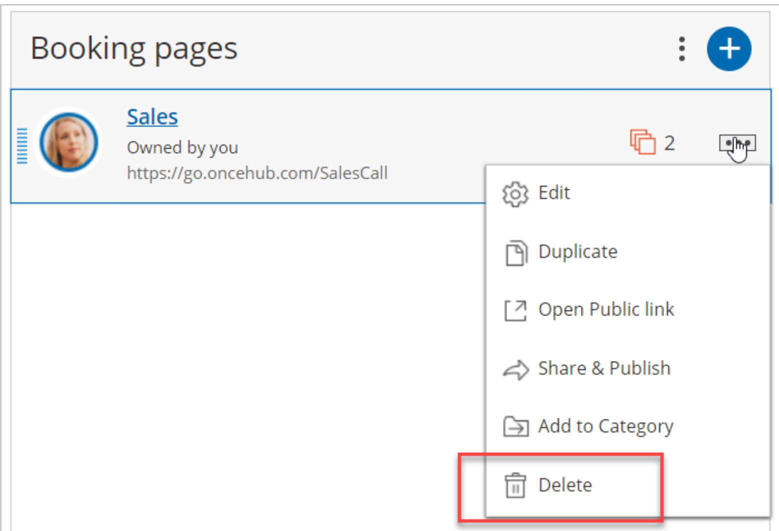


Figure 2: Deleting a Booking page

Effects of disabling your Booking page

- Customers will not be able to make new bookings.
- Customer will not be able to cancel existing bookings.
- Customer will not be able to reschedule existing bookings on that same page.
    - If an existing booking was booked through a chatbot, and the disabled page is an additional team member in a panel, they can reschedule the meeting if there are others available. However, the existing calendar event,

notifications, and any other data will not be updated.

- The Public content section is still visible to your Customers whether your page is enabled or disabled. Consider changing your personal message if you're thinking about disabling your Booking page.
- On the Booking page's Overview section, the **Accept bookings** toggle switch is in the **Off** position, and an alert message is displayed under the Booking page name with a link to enable the page (Figure 3). To facilitate accurate setup, the status of disabled pages is indicated in most Booking page lists within the app.

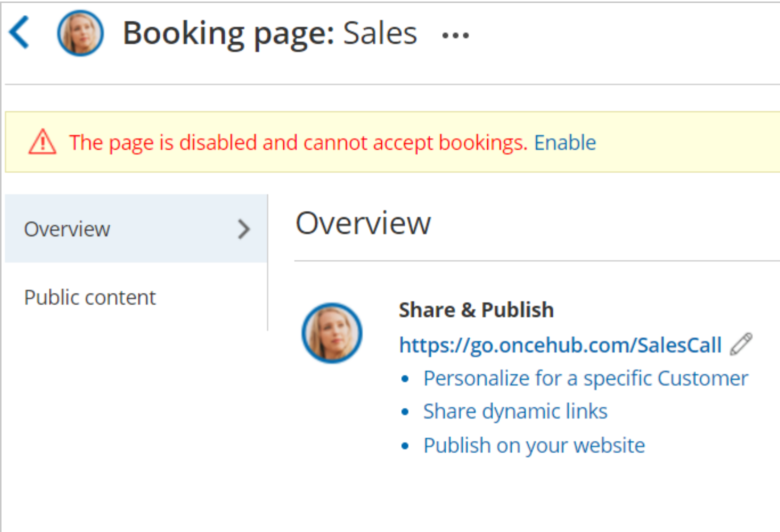


Figure 3: Booking page Enable link

- The Booking page will also be labelled as **[Disabled]** in the **Booking page scheduling setup** page (Figure 4).

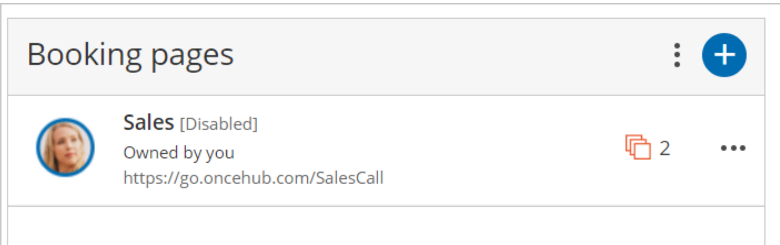


Figure 4: Disabled Booking page

- A **No times are currently available** message will show on your Booking page when Customers try to book with you (Figure 5).

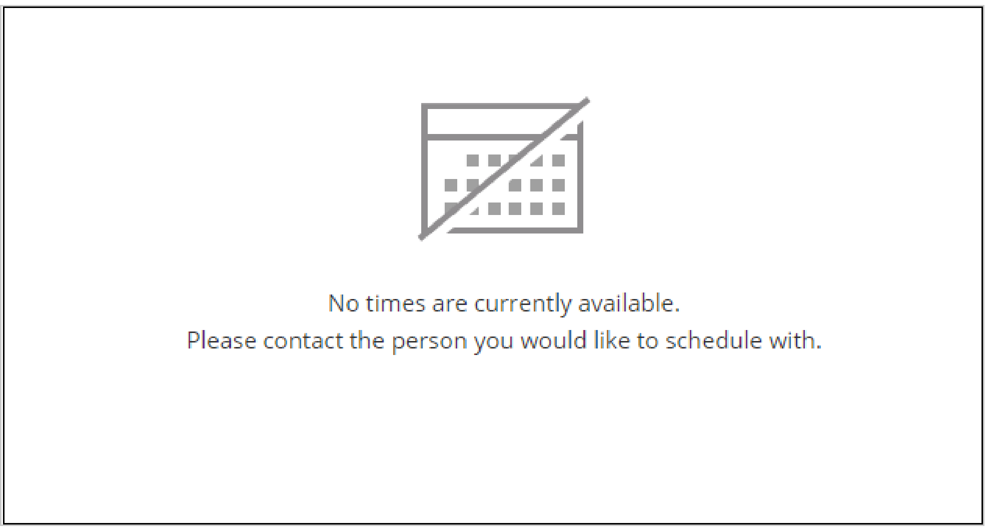


Figure 5: No times are currently available message

You do not need an assigned license to disable or enable Booking pages. Learn more

How to duplicate a Booking page

Last Modified on Jul 6, 2020

Duplicating Booking pages or Event types can save precious time for you when you're setting up and maintaining your OnceHub app. Duplication will instantly clone all your Booking page settings, associations with Event types and even images.

In this article, you'll learn how to duplicate Booking pages.

Duplicating Booking pages

To duplicate a Booking page, follow these steps:

1. Go to **Booking pages** in the bar on the left and click the action menu (3 dots) of the relevant Booking page (Figure 1).

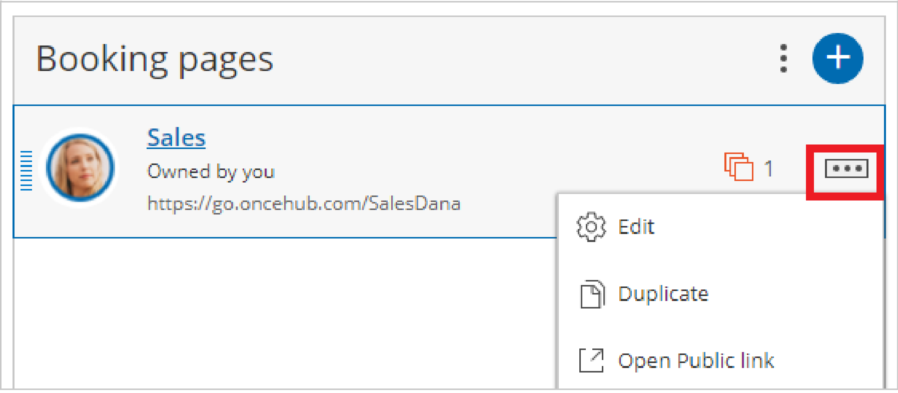


Figure 1: Individual Booking page action menu

2. Select **Duplicate**.
3. In the **Duplicate Booking page** popup window (Figure 2), enter the details for the new Booking page such as the **Public name**, the **Public link** and the Booking page Owner. You can also add an image if desired.

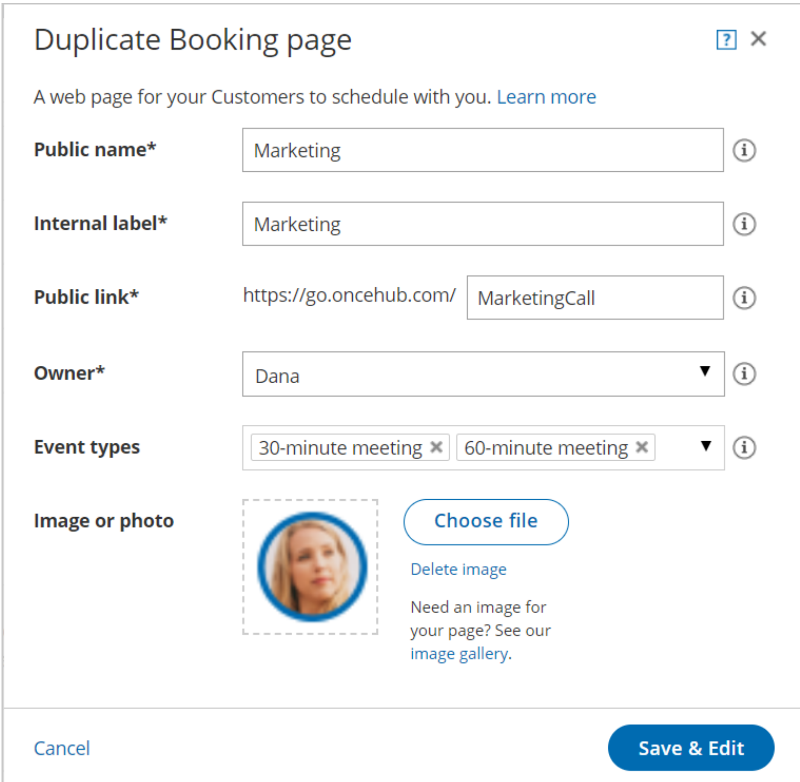


Figure 2: Duplicate Booking page popup

4. Once you click the **Save & Edit** button, you're brought to the settings of the newly duplicated Booking page.

Duplication rules

- Duplication of Booking pages follows the same rules as creation of new Booking pages. Members with the permission to create new Booking pages can also duplicate a Booking page.
- The User duplicating the Booking page is the default Owner, but they choose the Owner of the duplicated Booking page, as well as any Editors. On-screen messages will indicate if the ownership change has impact on page functionality.
- The new Booking page duplicates all the settings from the source Booking page, including associations with Event types.
- Inclusion in Master pages is **not** duplicated.
- Booking page access permissions are **not** duplicated in a multi-user account.

Booking page: Time zone settings

Last Modified on Apr 10, 2023

In addition to a wide range of time zone features, OnceHub has developed its own time zone and Daylight Saving Time database. We track Daylight Saving changes worldwide to ensure that you never have a time zone mishap.

Time zone settings

By default, the time zone on the Booking page is the same as the time zone in the **Date and time** section in the Booking page owner's OnceHub Profile (Figure 1). You can access this by signing into your OnceHub Account, opening the left navigation bar and selecting Profile **->** Date and time section.

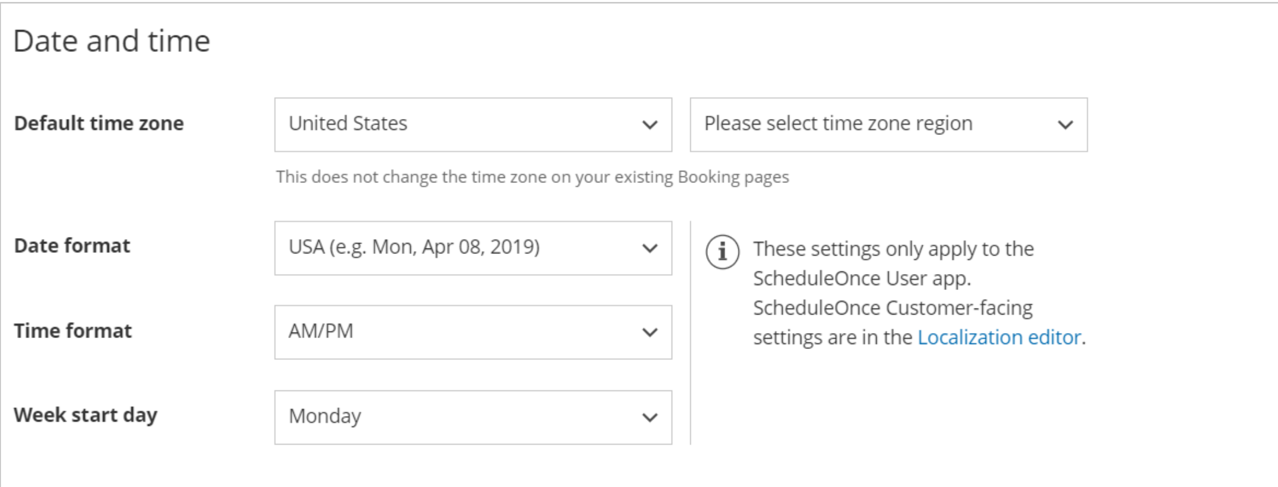


Figure 1: Date and time section

- You can change the time zone setting in the Overview, Recurring availability, or Date-specific availability sections of each Booking page.
- When you change the time zone in one of these sections, it automatically updates the other sections. The timezone on the User's profile is not affected.

The ability to have different time zones for different Booking pages is handy in the following scenarios.

Accepting appointments for distributed teams across multiple time zones

If you have Team members in multiple time zones, create a Booking page for each Team member. Each Team member's Booking page can be set to their local time zone. Bookings will be created directly in their calendar according to their local time zone.

This configuration is very useful for distributed teams such as sales teams, online tutors, consultants, and more. Learn more about User management

Scheduling for frequent travelers

If you travel often, one of the biggest challenges in scheduling your appointments is the need to manage scheduling for at least two locations and time zones: your home location and the destination location.

You can create a separate Booking page for each location or travel destination. You can set each Booking page to its own individual time zone and use Date-specific availability to specify the days and times of your stay in the local time zone. Learn more about scheduling meetings for a business trip

Booking page ownership

Last Modified on Oct 13, 2022

In this article, you'll learn about assigning Booking page ownership to a User.

The ownership of Booking pages can be changed by any OnceHub Administrator with a scheduled meetings license. You do not need to have a license to assign Booking page ownership. Learn more

Assigning Booking page ownership

There are two ways to assign ownership of a Booking page to a User:

1. Go to **Booking pages** in the bar on the left → Booking pages action menu (three dots) → **Booking page access**. In this section, you can determine which Booking pages each specific User owns.

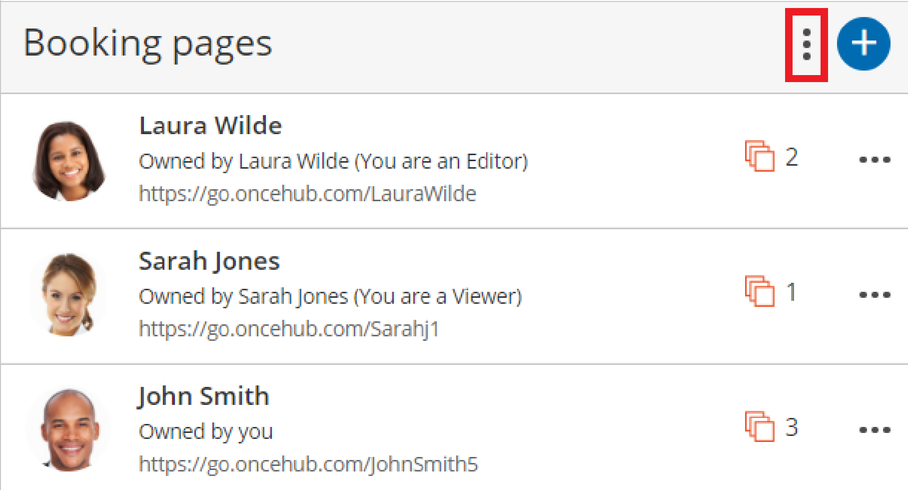


Figure 1: Booking page action menu

2. Go to **Booking pages** in the bar on the left → **Relevant Booking page** → **Overview section** (Figure 2). Here you can edit the specific Booking page's Owner.

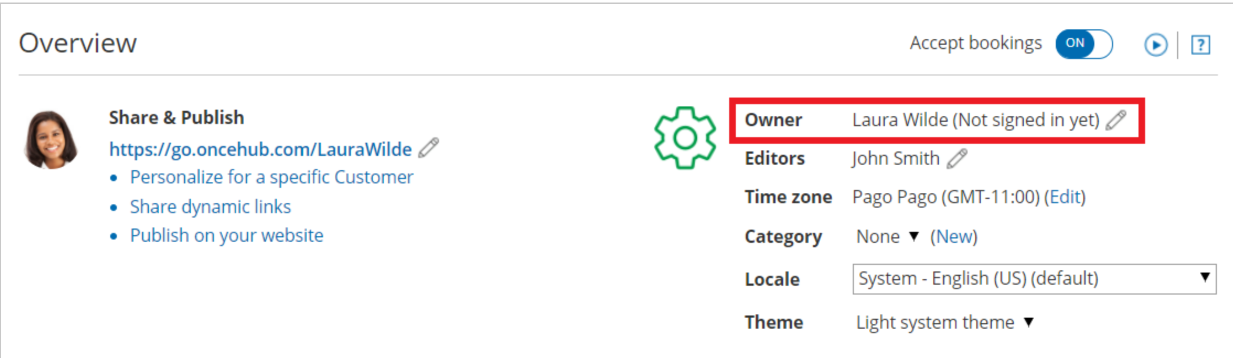


Figure 2: Booking page Overview section

Note:

If you change the Owner of a Booking page, any User notifications settings you have previously customized for the Owner will be returned to the default settings for the new Booking page Owner.

Assignment scenarios

Users can be connected to various applications: a calendar, a video conferencing solution, and also a CRM system. When you assign Booking pages, you might experience inconsistencies in application connections.

There are three assignment scenarios:

Assigning Booking page ownership to a new User

In this case, the new User profile does not yet exist. The Administrator invites the User to join the organization's account and at the same time assigns ownership of one or more Booking pages. Booking pages remain enabled even if the Owner has not signed up yet.

It is recommended that the new User review the settings of the Booking page, especially the Associated calendars section, to ensure that the desired calendars are selected.

The User must have a scheduled meetings license assigned to them in order to be Owner of an enabled Booking page. Learn more

New Owner of a Booking page are not connected to any application, or connected to the same application

If both the original and new Owners of a Booking page are connected to the same account within a specific application, they will remain connected and no action is required.

No connection differences between the original Owner and new Owner of a Booking page

In this case, the original Owner will be disconnected from the applications. When you update the changes in the new Owner's User profile, a message appears indicating the changes that will occur upon transfer of ownership.

An Administrator unassigns the Owner's scheduled meetings license

If you unassign someone's scheduled meetings license and they were Owner of a Booking page, that Booking page will be disabled automatically. If you prefer, you can reassign ownership to another User with a license.

Disconnection scenarios

The following disconnection scenarios can occur:

- **When disconnecting from a calendar:** The Booking section is reset to its default settings. The Booking page is set to Booking with approval with unlimited bookings per slot and unlimited bookings per day. The Time slot duration setting is set to 15 minutes and Starting times for time slots is set every 15 minutes.
- **When disconnecting from a video conferencing application:** The Conferencing / Location section of the Booking page is automatically set to the **Don't use conferencing or location** option. You will need to update the Conferencing / Location settings manually.
- **When disconnecting from a CRM:** the Booking pages will not create or update records in the CRM.

Ensuring that Customers reschedule with the same Booking page

Last Modified on Oct 13, 2022

If your Master page includes multiple Booking pages and associated Event types, you can define how bookings will be assigned during the scheduling process. You can decide whether or not a rescheduled booking is assigned to the same Team member originally assigned to it.

If you enable this option, the same Team member is responsible for the service provided to the Customer during the entire booking lifecycle, resulting in a smooth Customer experience.

In this article, you will learn how to ensure that Customers reschedule with the same Booking page.

Requirements

To enable this rescheduling option:

- You must be a OnceHub Administrator
- You must be working with Event types
- The Master page scenario must be Event types first, Booking pages first, or Rule-based assignment with Static rules

How to enable restricted rescheduling

During the rescheduling process, you have the option to limit rescheduling to the same Booking page that the Customer made the original booking with. To enable this restricted rescheduling option, use the following steps:

1. Go to **Booking pages** in the bar on the left.
2. Select the relevant Master page.
3. Select the **Assignment** section.
4. If your Master pages uses Rule based assignment with Static rules: in the **Distribution method** section, check the box marked **Rescheduling is only possible on the page on which the booking was made** (Figure 1).

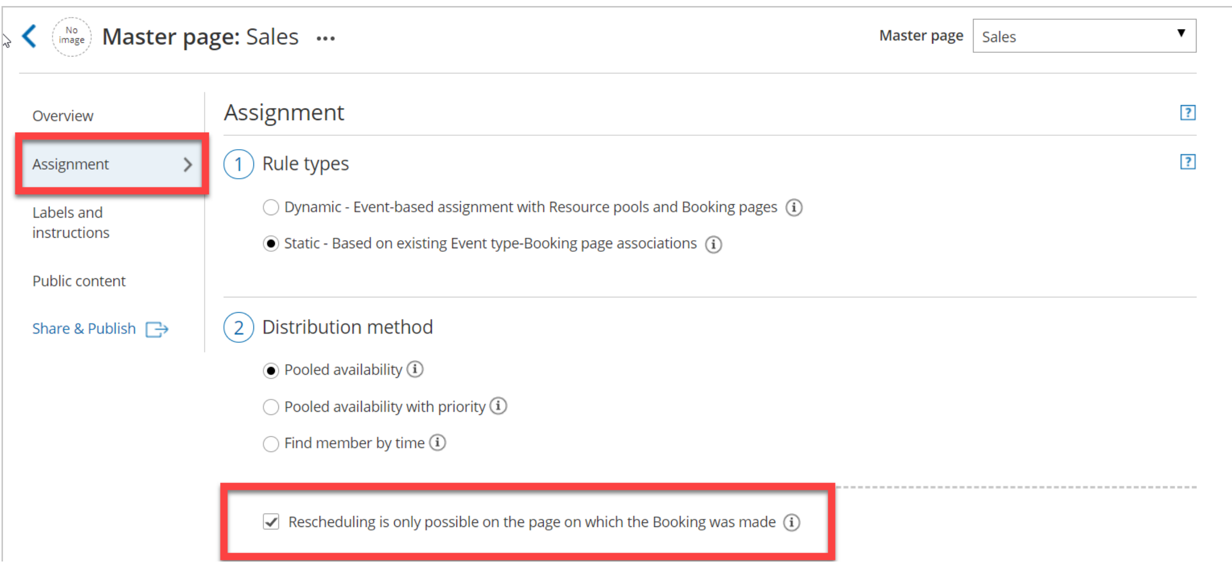


Figure 1: Limiting rescheduling on a Master page which uses Static rules

> **Note:**
>
> If a Master page is using Dynamic rules or Resource pools, then a Customer can only reschedule with the original Booking page.

5. If your Master pages uses Event types first or Booking pages first: in **Assignment upon reschedule** section, check the box marked **Reschedule is only possible on the page on which the booking was made** (Figure 2).

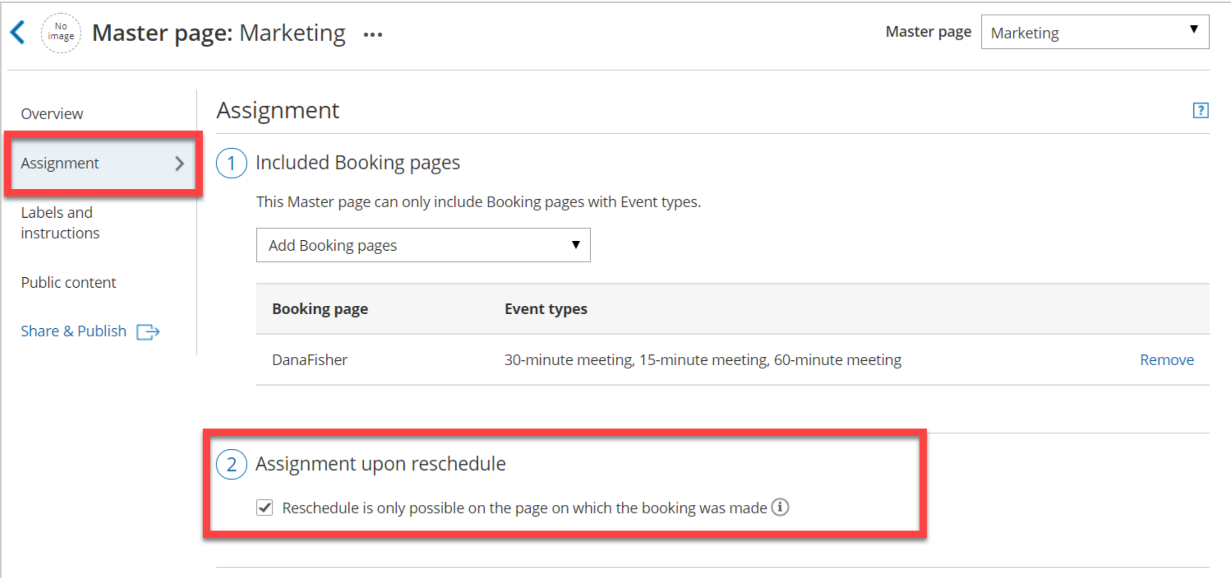


Figure 2: Limiting rescheduling on a Master page using Event types first or Booking pages first

6. Click **Save**.

Scheduling scenarios

When the Customer reschedules a booking while restricted rescheduling is enabled, they will be presented with the same Booking page that the original booking was made on. The reschedule option is available whether you work with Automatic mode or Booking with approval.

> **Note:**
>
> If the Booking page ownership has been changed, the Customer will see the updated Booking page, rather than the original one.

The reschedule option is applied to the following scheduling scenarios:

Customer reschedules a booking

The Customer clicks the Cancel/reschedule link from the booking confirmation notification and reschedules the booking.

- **If the Booking owner and Booking page owner are the same:** In the Activity stream, the original event is simply updated with the new time and moved in the calendar as a Rescheduled activity. There is no canceled activity and one calendar event is used for the entire booking lifecycle, keeping your records more consistent and efficient.
- **If the Booking owner and Booking page owner are different:** In the Activity stream, the original activity is

canceled and a new activity is created. Learn more about Booking reassignment

Learn more about rescheduling by a Customer

User sends a request to reschedule for the same Event type

In this case, the Customer clicks the **Reschedule now** button in the reschedule request email notification (Figure 3) and reschedules the booking. In the Activity stream, the original activity is canceled and a new activity is created when the Customer reschedules. Learn more about rescheduling by User with Event types

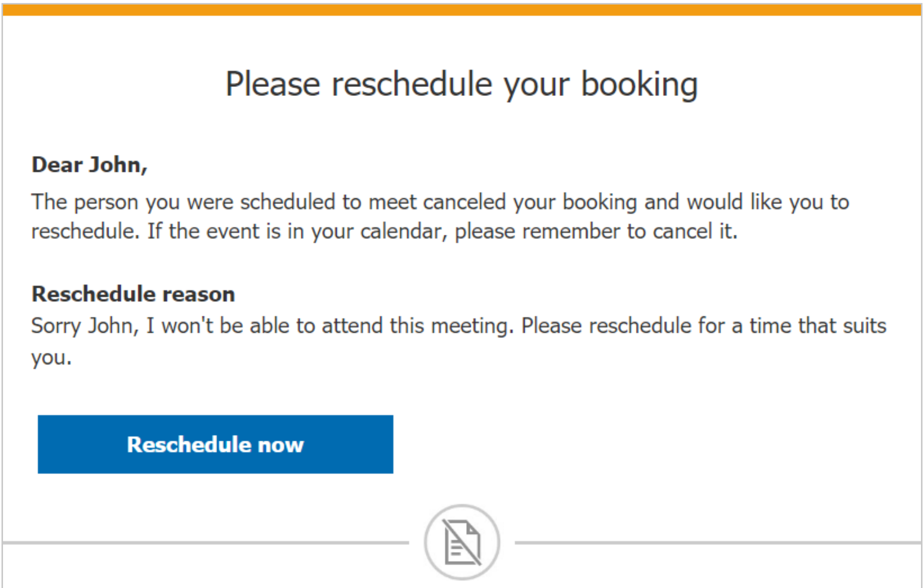


Figure 3: Reschedule request email notification to Customer

Important:

If the Booking page cannot accept bookings, the Customer will not be able to reschedule.

Introduction to the Scheduling options section

Last Modified on Oct 11, 2022

In the Scheduling options section, you can define the booking mode, the number of sessions your Customers can book at once, and how many Customers can join the session.

Location of the Scheduling options section

When you associate Event types with your booking page, the Scheduling options section is located on the Event type. This allows you to standardize the Scheduling options for your scheduling scenarios. Learn more about the location of the Scheduling options section

- For Booking pages **associated** with Event types (recommended), go to **Booking pages** in the bar on the left; select the relevant **Event type**; go to the **Scheduling options** section.
- For Booking pages **not associated** with Event types, go to **Booking pages** in the bar on the left; select the relevant **Booking page**; go to the **Scheduling options** section.

Automatic booking or Booking with approval?

Automatic booking: Use this mode when you want scheduling to happen automatically. Learn more about Automatic booking

Booking with approval: Use this mode when you want to approve each booking and select the final time. Learn more about Booking with approval

Single or multiple sessions?

Single session: Use this mode when you want Customers to book one session at a time.

Session package: Use this mode when you want Customers to book more than one session at a time. Learn more about Session packages

One-on-one or Group session?

One-on-one session: Use this mode when you want to meet with Customers individually.

Group session: Use this mode when you want to meet with more than one Customer at a time. Learn more about Group sessions

Location of the Scheduling options section

Last Modified on Oct 11, 2022

Scheduling options are located on the Booking page by default. If you associate Event types with your Booking page, the **Scheduling options** section is located on the Event type. This allows you to standardize the settings for your scheduling scenarios. Learn more about associating Event types with Booking pages

Booking pages associated with Event types

For Booking pages **associated** with Event types (recommended), go to **Booking pages** in the bar on the left, select the relevant **Event type**, and go to the **Scheduling options** section (Figure 1).

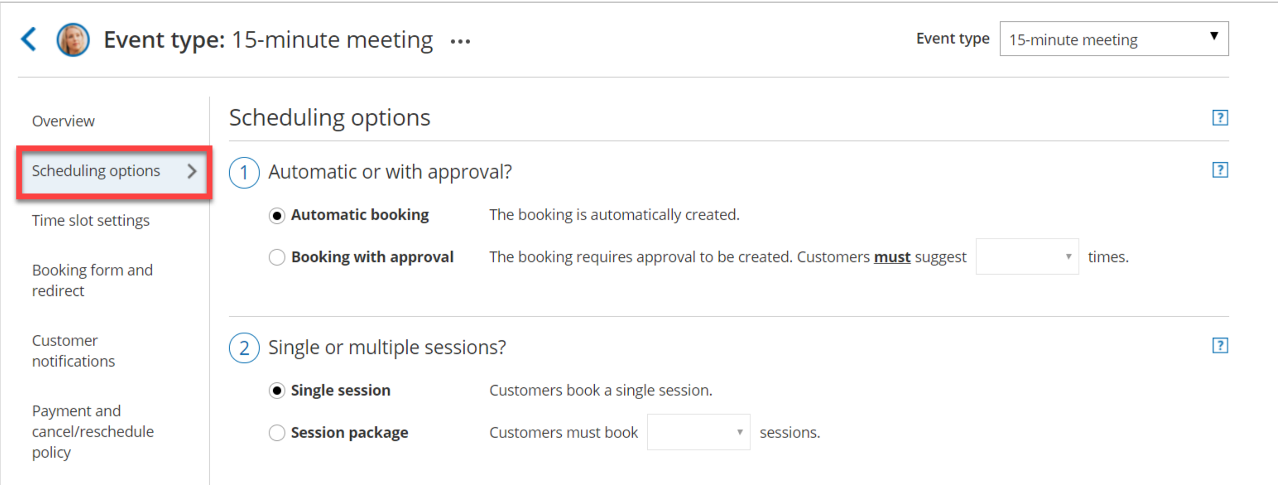


Figure 2: Scheduling options section when your Booking page is not associated with Event types

Booking pages not associated with Event types

For Booking pages **not associated** with Event types, go to **Booking pages** in the bar on the left, select the relevant **Booking page**, and go to the **Scheduling options** section (Figure 2).

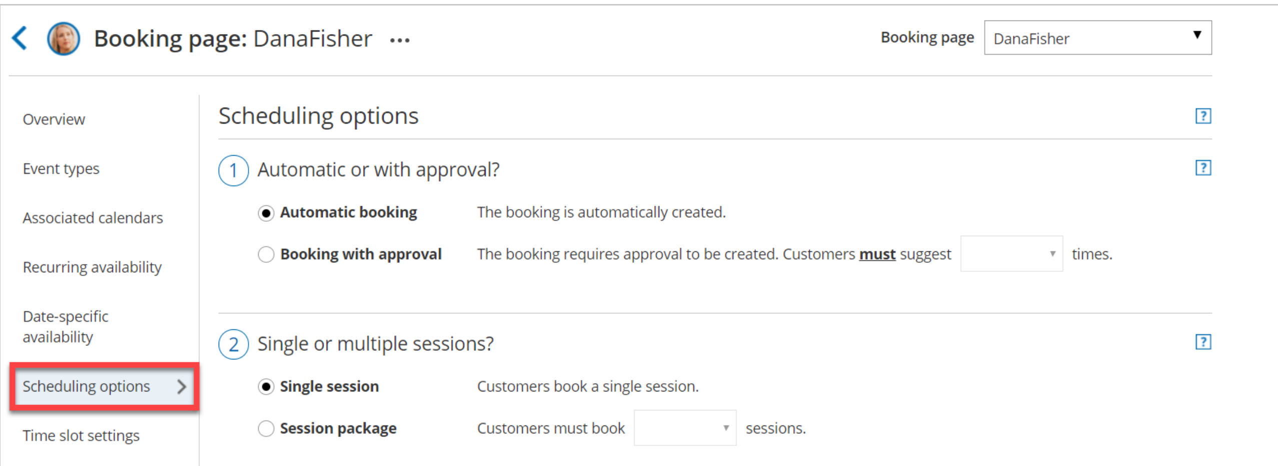


Figure 1: Scheduling options section when your Booking page has associated Event types

Automatic booking or Booking with approval

Last Modified on Oct 11, 2022

When you work in Automatic booking mode, the Customer makes a booking and it's automatically created in your calendar with no further action required. See a demo

In Booking with approval mode, you get to review and approve each booking request before it's scheduled. See a demo

In this article, you'll learn about the two different modes and when to use them.

Automatic Booking Mode

When should I use Automatic booking?

It's good to use Automatic booking mode when you're scheduling the same type of appointments, such as customer appointments, advisory sessions, or interviews. Automatic booking saves you a great deal of time, as everything happens automatically and your calendar just fills up with appointments.

> **Note:**
>
> When you're you haven't connected a calendar and a Customer makes a booking, it's automatically created in the Activity stream and a scheduling confirmation is sent to all relevant Users. You can manually add the event to your calendar directly from the confirmation email.

Working with single sessions or session packages

The booking can be for a single session or for multiple sessions. You can select the exact number of sessions by going to **Booking pages** in the bar on the left → click relevant Booking page → **Scheduling options** section and using the **Single or multiple sessions** option. For example, if the Customer must book 10 sessions, they will not be able to submit 9 or 11 sessions. Learn more about Session packages

> **Note:**
>
> If your Booking page is associated with Event types (recommended), the **Scheduling options** section will be located under each Event type.

Meeting duration and meeting increments

When you work in Automatic booking mode, all time settings are in 5-minute increments. This means an appointment can be as short as 5 minutes. In contrast, when using Booking with approval, you are limited to 15-minute increments.

Booking with approval mode

To set Booking with approval mode, go to **Booking pages** in the bar on the left → click your Booking page → Scheduling options section.

Note :

If your Booking page is associated with Event types, the **Scheduling options** section will be set at the Event type level. Learn more

When you select Booking with approval mode, you set the number of times your Customers must suggest. The more times you ask your Customers to suggest, the more flexibility you'll have when you pick the final time. Once a Customer submits their booking, you'll be notified to review the suggested times and approve the booking request. Booking with approval mode works in 15-minute increments. If you need shorter increments, Automatic booking works in 5-minute increments.

Booking with approval mode is available in all plans. It differs from Automatic booking mode, where scheduling happens automatically.

Note:

When a Customer selects a few times on your Booking page, these requested times will not block your availability yet, since they have not been scheduled. When you approve the final time, it will become busy time and block your availability during that time slot.

When there's a high degree of variability in your schedule, Booking with approval mode gives you the control over the time that you select for the booking. It's good to use this mode in the following cases:

- When you want to approve each request before it's scheduled.
- When you don't have many meeting requests.
- When you have a high degree of variability in the types of your meeting requests.

Session packages

Last Modified on Jun 2, 2023

OnceHub provides two options for controlling the number of sessions submitted per booking:

- **Single session:** The Customer books a single session when making a booking. This is the default mode.
- **Session package:** The Customer must book an exact number of sessions in one booking. You can choose from one to twenty sessions per booking.

In this article, you'll learn about using Sessions packages.

Session packages

Session packages allow you to offer your Customers the opportunity to schedule multiple sessions at once. This is a great way to entice your customers to make a longer term commitment to your Event types. When they schedule with you, your Customers will pick a number of different time slots that suit them and will only be required to provide their details once. See a demo

The setting that controls Session packages is the **Single or multiple sessions** option in the Scheduling options section. The location of this section depends on whether you are working with or without Event types.

After submission, multiple sessions are automatically created and the Customer and the Owner receives one consolidated notification with all sessions made via the single booking process.

Canceling or rescheduling Session packages

Customers can easily cancel or reschedule one or more sessions in the Session package, subject to the Customer cancellation and reschedule policies, without affecting the other scheduled sessions. This feature is very useful when you want to allow Customers to book multiple sessions at once, quickly and easily.

The Booking page Administrator can cancel/reschedule a single session within a Session package at any point. This action is done from the Activity stream where each session is listed individually.

Rules for Session packages

1. Session packages are only available if you're using the Automatic booking mode.
2. All sessions booked in a Session package must be made for one specific Event type or Booking page. Splitting sessions between Booking pages and Event types is not possible. When you're using multiple Event types or Booking pages, you need to define the Session package setting for each Event type and Booking page.
3. Session packages won't work with Pooled availability.
4. Session packages won't work with any limitation on the number of bookings per day or the number of bookings per week. It can only work with unlimited bookings per day or week and vice versa. Learn more about conflicting settings when using Session packages
5. When the Customer opens and saves an ICS file, it creates a series of calendar events for their personal calendar. Each calendar event is independent and has a single time and Cancel/Reschedule link.
6. If you're using Zoom, GoToMeeting, or Webex Meetings for web conferencing, each session includes its unique web conferencing details:

- All Customer emails, including confirmation, cancellation, and reschedule emails, include a Conferencing info link next to each selected time. When the Customer clicks on the link, the scheduling confirmation page opens as if a single booking was made, displaying the full booking details including web conferencing information.
- Every email reminder that the Customer receives will include the full booking details, including the web conferencing information, as if a single session was booked.
- All calendar events for the Owner and Customer include the complete web conferencing information for each session.

Session packages when working without Event types

When you work without Event types, the setting that controls Session packages is the **Single or multiple sessions** option in the **Scheduling options** section under **Booking pages** in the bar on the left → Select your **Booking page** → Scheduling options.

Session packages when working with Event types

When you work with Event types, the setting that controls Session packages is the **Single or multiple sessions?** option in the **Scheduling options** section under **ooking pages** in the bar on the left → Select your **Event type → Scheduling options**.

When you work with Event types, payment settings can be defined for the specific Event type configured to use Session packages. In the Payment and Cancel/Reschedule section you can set up an Event type price for the whole package.

Session packages with Payment integration

If your Session packages are linked to Event types, you can make use of our comprehensive Payment integration. Session packages with Payment integration is a very powerful combination because it allows you to entice Customers to commit to and pay upfront for a number of sessions at the same time.

Therefore, in addition to creating and building Customer commitment, Session packages with Payment integration also allow you to generate an additional revenue stream. This also gives you the opportunity to offer your Customers discounted prices.

Example 1

Say you're charging $100 for a single consultation session. With Session packages, you can offer Customers 10 sessions for the price of $800. This means that rather than paying $100 for each session, Customers pay $80 for each session for a discount of $20 per session (or $200 overall).

With Payment integration, you can **automatically** collect payment from Customers for all sessions in one go. Payment is collected for the entire package rather than collecting payment per session. With our Payment integration, you can also configure the Customer cancellation/reschedule policies to **automatically** handle rescheduling fees and refunds. Rescheduling fees and refunds are set at the session level.

Finally, with Payment integration you can also choose to **manually** refund Customers who paid for a Session package at any point in time. This action is done from the Activity stream. Learn more about refund settings

Example 2

You configure a Session package of 3 sessions to have a price of $150 (i.e. a relative cost of $50 for each session).

When defining your rescheduling policy, you decide to specify that Customers should pay a reschedule fee which equates to 10% of the relative cost of each session whenever they reschedule. This means that if a Customer reschedules one session, they will be required to pay $5 (10% of the relative cost of one session). If a Customer reschedules three sessions, they will be required to pay $15 (10% of the relative cost of three sessions).

Similarly, when you define your cancellation policy, you decide to specify that Customer will receive a refund which equates to 50% of the relative cost of each session whenever they cancel. This means that if a Customer cancels one session, they will be refunded $25 (50% of the relative cost of one session). If a Customer cancels three sessions, they will be refunded $75 (50% of the relative cost of three sessions).

If at any point throughout the booking lifecycle you decide that a refund is necessary, you can decide to issue the Customer a manual refund. The amount of refund is completely up to you and does not have to be relative to the cost of a single session.

One-on-one or Group session

Last Modified on Jun 2, 2023

OnceHub gives you three options to control the number of bookings per time slot. You can allow for only a single booking per time slot, multiple bookings per time slot, or unlimited bookings per time slot.

In this article, you'll learn how to set up One-on-one or Group sessions and how the rules that apply depending on whether or not you have a connected calendar.

Location of the One-on-one or Group session setting

To set up One-on-one or Group sessions, navigate to the **Scheduling options** section of the Booking page or Event type (Figure 1). The location of the **Scheduling options section** depends on whether or not your Booking page has any Event types associated with it. Learn more about the location of the Time slot setting section

- If your Booking page is not linked to an Event type, the Scheduling options will be on the Booking page.
- If you have linked your Booking page to at least one Event type, the Scheduling options will be on the Event type.

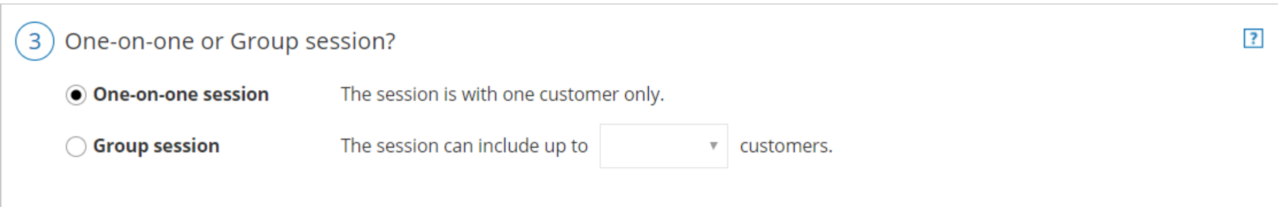


Figure 1: Scheduling options section

One-on-one session

With One-on-one sessions, time slots becomes unavailable as soon as a single booking is made. This is the default setting.

The following rules apply for One-on-one sessions.

When using OnceHub with a connected calendar

- Busy time from any selected calendar closes the slot, regardless of whether it was added via the Booking page or directly to the calendar.
- Calendar events with a status of "Free" or "Available" will not block the slot.
- Each booking can be canceled or rescheduled by the Customer or the Owner. This will automatically free up the slot so that a new booking can be made.

When using OnceHub without a connected calendar

- Only bookings made directly on the Booking page will close the slot.
- Each booking can be canceled or rescheduled by the Customer or the Owner. This will free up the slot so that a new booking can be made. If the event is in the User’s calendar, they should remember to remove it manually.

Group session - multiple bookings per slot

With Group sessions you can specify the number of bookings that can be made before the slot becomes unavailable. This mode is used to accept bookings for activities or events where more than one Customer signs up for the same time. Examples of this type of booking are classes, tours, and lectures. See a demo

The following rules apply for Group sessions with multiple bookings per slot.

When using OnceHub with a connected calendar

- Multiple bookings per slot applies to the main booking calendar only. Any busy time that is retrieved from additional calendars will block the slot regardless of the slot's capacity.
- Each busy time in the main booking calendar will be counted as one booking towards the capacity defined in the Booking page or Event type regardless of whether it was added via the Booking page or directly to the calendar. For example, if a Booking page is set to accept two bookings per slot, the slot would close if one booking was created via the Booking page and another booking was created directly in the main booking calendar.
- Calendar events that have a status of "Free" or "Available" will not be counted towards the defined capacity.
- Each booking creates its own calendar event in the main booking calendar. For example, if there are three bookings per slot, the calendar events will be created next to each other on the calendar grid.
- Each booking can be canceled or rescheduled by the Customer or the Owner. This will automatically free up the slot so that a new booking can be made.

When using OnceHub without a connected calendar

- Only bookings made directly on the Booking page will close the slot.
- Each booking will be counted as one booking towards the capacity defined in the Booking page or Event type. For example, if a Booking page is set to accept two bookings per slot, both bookings must be created via the Booking page to block availability.
- A scheduling confirmation email is sent for each booking. The User can manually add each booking to the calendar by clicking the calendar event in the scheduling confirmation email.
- Each booking can be canceled or rescheduled by the Customer or the User. This will free up the slot so that a new booking can be made. If the event is in the User's calendar, he should remember to remove it manually.

Group session - unlimited bookings per slot

In this mode, there is no limit on the number of bookings per slot. This mode will never block availability. Unlimited bookings per slot is used for webinars and online classes where there is no physical limitation on capacity.

The following rules apply for Group sessions with unlimited bookings per slot.

When using OnceHub with a connected calendar

- Unlimited bookings per slot applies to the main booking calendar only. Busy time that is taken from additional calendars will close the slot, regardless of its unlimited capacity.
- Each booking creates its own calendar event in the main booking calendar. For example, if there are three bookings per slot, the calendar events will be created next to each other on the calendar grid.
- Each booking can be canceled or rescheduled by the Customer or the User. This will not affect the slot's capacity, as it is unlimited.

When using OnceHub without a connected calendar

- Unlimited bookings per slot will not block availability on your Booking page.
- A scheduling confirmation email is sent for each booking. The User can manually add each booking to the calendar by clicking the calendar event in the scheduling confirmation email.
- Each booking can be canceled or rescheduled by the Customer or the Owner. This will not affect the slot's capacity, as it is unlimited. If the event is in the User's calendar, they should remember to remove it manually.

Conflicting settings when using Group sessions

Last Modified on May 15, 2024

Group sessions can cause settings conflicts if your booking page is set up to create bookings in more than one calendar and retrieve busy time from the same calendars.

In the following scenarios, it is impossible to use the Group sessions setting.

- Team Booking page (Panel meetings)**:** The booking page retrieves busy time from all team member calendars and automatically adds the calendar event to all team member calendars when the booking is made.
- Booking conditional on a single resource**:** The booking page retrieves busy time from the Owner’s calendar and the resource's calendar, and automatically adds the Calendar event to the Owner’s calendar and the resource's calendar.
- Booking conditional on multiple resources**:** The Booking page retrieves busy time from the Owner’s calendar and one of the resources’ calendars, and automatically adds the Calendar event to the Owner’s calendar and the assigned resource’s calendar.
- Buffer time: When scheduling a group session, the buffer time setting for all events on the connected calendar will not be taken into account.

So, what should you do if you need to use Group sessions with the above scenarios?

1. If possible, select to not retrieve busy time from the additional booking calendars.
2. Use your group session Event types with a Booking page which retrieves busy time from your main booking calendar only so that the limitation will not apply.
3. Use a Booking page without Event types and set it to retrieve busy time from your main booking calendar only so that the limitation will not apply.

Group sessions and the number of bookings per day or per week

Group sessions cannot be used with the setting that limits the number of bookings per day or the number of bookings per week defined in the Time slot settings of the relevant Booking page or Event type. The limitation on the number of bookings per day or the number of bookings per week can cause slots to be partly filled and introduces a high level of complexity which can cause unnecessary confusion.

Conflicting settings when using Session packages

Last Modified on Jun 14, 2019

Session packages are not compatible with the following configuration settings and vice versa:

Limitation on the number of bookings per day or per week

If you have defined any limitation on the number of bookings per day or week in the Time slot settings of the Booking page, you cannot offer session packages through that Booking page. This is due to the fact that the limitation on the number of bookings per day or week takes into account booked appointments.

Any limitations on the manner in which Session packages can be made must be done when you set up the Session package, before any bookings are submitted.

Learn more about limiting on the number of bookings per day or per week

Rule-based assignment Master pages

Session packages cannot be used with Master pages with Rule-based assignment. This is because Rule-based assignment bookings are distributed to Team members via Round robin, Pooled availability, Pooled availability with priority, or Find member by time. If Session packages were enabled, the bookings might be split across multiple Team members. For this reason, it is not allowed.

Learn more about Master pages with Rule-based assignment

Introduction to Time slot settings

Last Modified on Oct 15, 2024

In the **Time slots settings** section, you can set up the duration, Time slot display, Workload rules, Timeframe rules, and other settings related to time slots.

Location of the Time slot settings section

Time slot settings are located on the Booking page by default. If you associate Event types with your Booking page, the **Time slots settings** section is located on the Event type. This allows you to standardize the settings for your scheduling scenarios. Learn more about the location of the Time slot settings section

- For Booking pages **associated** with Event types (recommended), go to **Booking pages** in the bar on the left → select the relevant **Event type → Time slot settings**.
- For Booking pages **not associated** with Event types, go to **Booking pages** in the bar on the left → select the relevant **Booking page → Time slot settings.**

Settings

The following settings can be managed in the **Time slots settings** section.

Time slot display

This is where you control time slot duration, starting times and time slot spacing. Learn more about customizing the Time slot display

Workload rules

This section allows you to put limits on your available time. You can insert a buffer between bookings and cap the number of appointments you will accept in any given day or week. Learn more about customizing Workload rules

Timeframe rules

This is where you control how much lead time Customers must give you before bookings, and how far in advance they can book. Learn more about customizing Timeframe rules

Time zone conversion

This setting allows you to control how time slots are converted to the Customer's time zone. You can also disable time zone conversion. Learn more about customizing Time zone conversion

Time slots offered per day

This setting allows you to limit the maximum number of displayed time slots per day, and distributes them as evenly as possible. You can use this setting if you want to look busier than you really are or if you want to prevent Customers from selecting adjacent time slots in Booking with approval mode. Learn more about customizing Time slots offered per day

Location of the Time slot settings section

Last Modified on Oct 11, 2022

Time slot settings are located on the Booking page by default. If you associate Event types with your Booking page, the **Time slots settings** section is located on the Event type. This allows you to standardize the settings for your scheduling scenarios. Learn more about associating Event types with Booking pages

Booking pages associated with Event types

For Booking pages **associated** with Event types (recommended), go to **Booking pages** in the bar on the left → select the relevant **Event type → Time slot settings** (Figure 1).

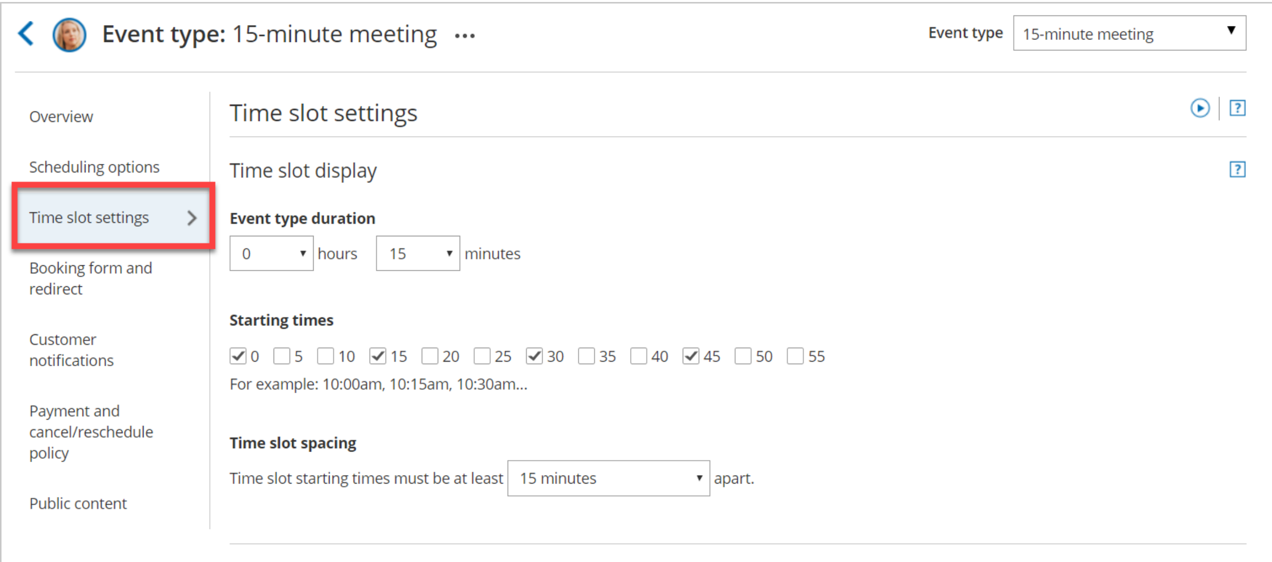


Figure 1: Time slot settings when your Booking page has associated Event types

Booking pages not associated with Event types

For Booking pages **not associated** with Event types, go to **Booking pages** in the bar on the left → select the relevant **Booking page → Time slot settings** (Figure 2).

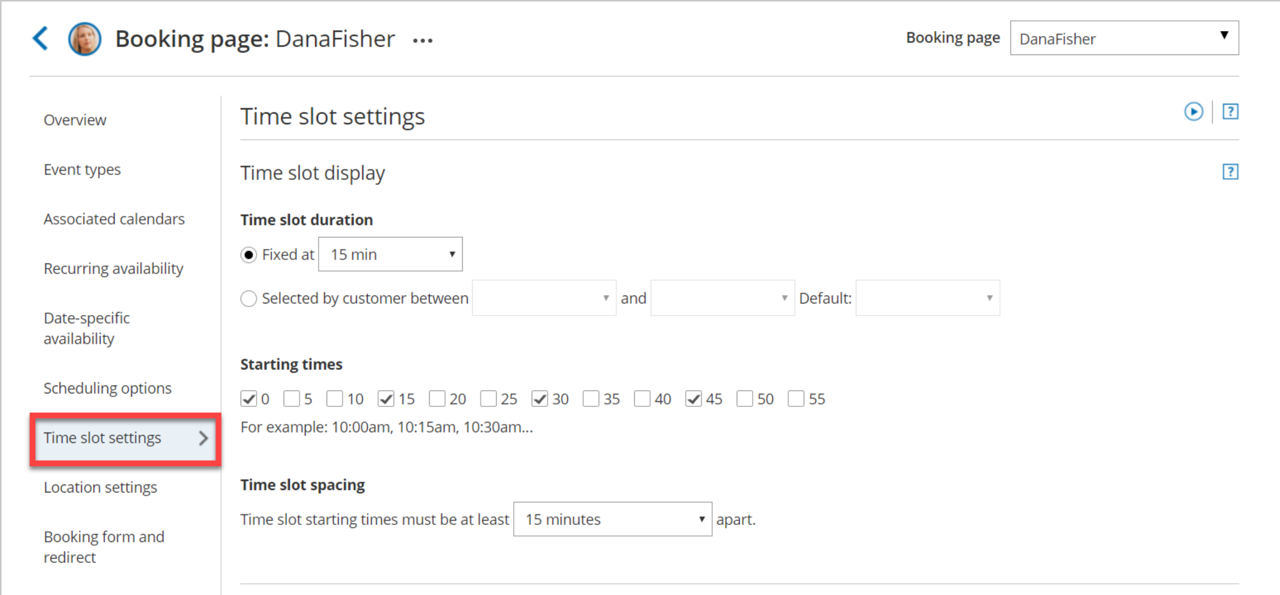


Figure 2: Time slot settings when your Booking page is not associated with Event types

Time slot display

Last Modified on Oct 11, 2022

The time settings available in the **Time slot display** section allow you to model a wide range of meeting scenarios. In this article, you'll learn how to set the duration of bookings and how to control when time slots are offered to Customers.

Location of the Time slot display section

You can find the **Time slot display** under **Time slot settings**. The location of the **Time slot settings** depends on whether or not your Booking page has any Event types associated with it. Learn more about the location of the Time slot setting section

- For Booking pages **associated** with Event types (recommended), go to **Booking pages** in the bar on the left → select the relevant **Event type → Time slot settings**.
- For Booking pages **not associated** with Event types, go to **Booking pages** in the bar on the left → select the relevant **Booking page → Time slot settings.**

Time slot duration

You can set a fixed time slot duration or you can allow the Customer to select a duration within a range set by you.

If you want to allow Customers to select the meeting duration, simply define the selection range and set the default value that you want to use.

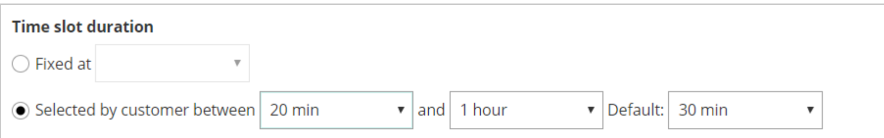


Figure 1: Time slot duration

> **Important:**
>
> Variable duration (when the Customer chooses the meeting duration) is not available when your Event type is associated with a Booking page.

Starting times

You can control the time at which time slots can start. For example, on the hour (0), on the half hour (30), or any other time in 5 minute increments.

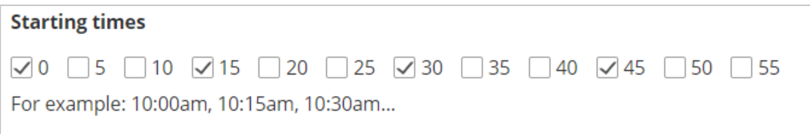


Figure 2: Starting times

Time slot spacing

You can use the drop-down to set the minimum gap between time slot starting times. For example, time slot starting times must be at least 15 minutes/ 45 minutes/ 2 hours apart.

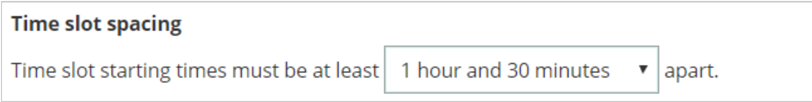


Figure 3: Time slot spacing

Workload rules

Last Modified on Oct 11, 2022

In this article, you'll learn about using Workload rules to control your daily and weekly workload.

Location of the Workload rules section

You can find **Workload rules** under **Time slot settings**. The location of the **Time slot settings** depends on whether or not your Booking page has any Event types associated with it. Learn more about the location of the Time slot settings section

- For Booking pages **associated** with Event types (recommended), go to **Booking pages** in the bar on the left → select the relevant **Event type → Time slot settings**.
- For Booking pages **not associated** with Event types, go to go to **Booking pages** in the bar on the left → select the relevant **Booking page → Time slot settings.**

Buffer before and after the meeting

The booking buffer automatically creates gaps between time slots and busy time on your calendar. These gaps can be used to account for travel time, cleanup time, rest time and more. If you don't want the buffer to affect you, simply leave it on its default, at zero.

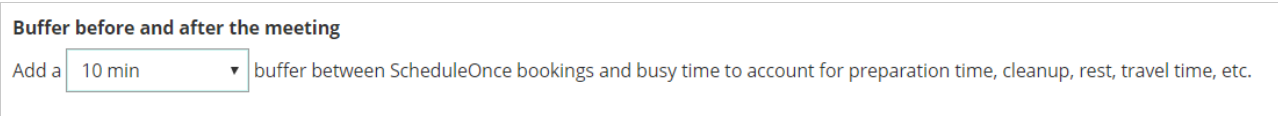


Figure 1: Buffer before and after the meeting

The buffer only creates gaps between busy time in your calendar. It does not create gaps between the available time slots that you have on your booking calendar. If you want to control the gaps between your available time slots, you can use the **Time slot spacing** setting or create custom gaps in the Recurring availability section or Date-specific availability section.

Number of bookings per day

This setting allows you to set a cap on the number of bookings that can be scheduled per day. When the cap is reached, the entire day will become unavailable and no more bookings will be accepted. Learn more about limiting the number of bookings per day

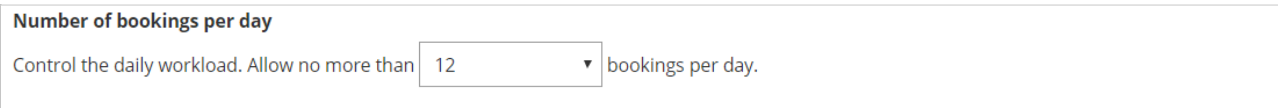


Figure 2: Number of bookings per day

Number of bookings per week

This setting allows you to set a cap on the number of bookings that can be scheduled per week. When the cap is reached, the entire week will become unavailable and no more bookings will be accepted. Learn more about limiting the number of bookings per week

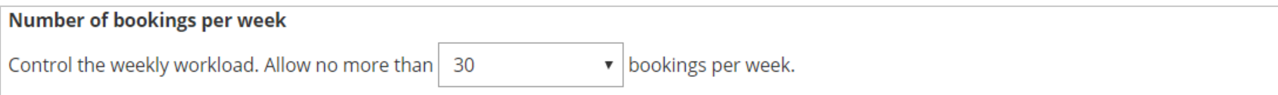


Figure 3: Number of bookings per week

Important:

Both the **number of bookings per day** and **number of bookings per week** settings can be used concurrently. In this case, the setting with the strongest restriction overrides the other setting. For example, if the **number of bookings per day** is set to 1 and the **number of bookings per week** is set to 3, the entire week will be blocked after 3 bookings are made at any time during the week.

Timeframe rules

Last Modified on Jun 15, 2023

Timeframe rules allow you to limit the timeframe for accepting bookings **Before an event** and **Into the future**.

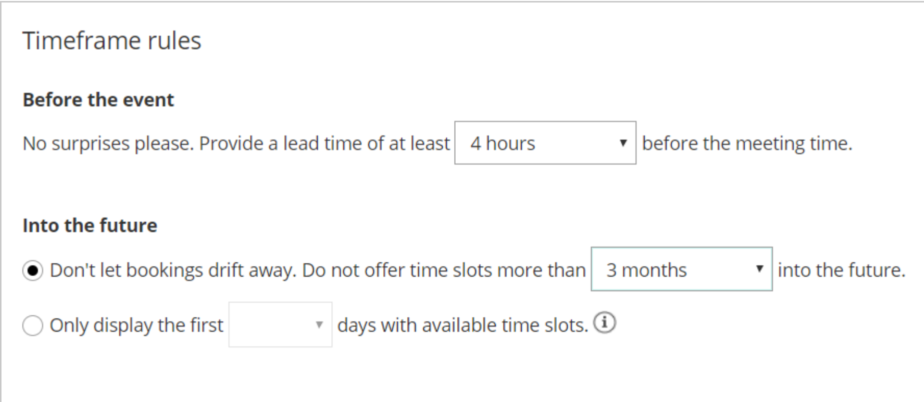


Figure 1: Timeframe rules section

In this article, you'll learn about using Timeframe rules.

Location of the Timeframe rules section

You can find **Timeframe rules** under **Time slot settings**. The location of the **Time slot settings** depends on whether or not your Booking page has any Event types associated with it. Learn more about the location of the Time zone settings section

- For Booking pages **associated** with Event types (recommended), go to **Booking pages** in the bar on the left → select the relevant **Event type → Time slot settings**.
- For Booking pages **not associated** with Event types, go to go to **Booking pages** in the bar on the left → select the relevant **Booking page → Time slot settings**.

Before the event

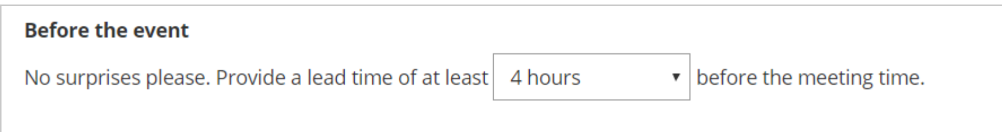


Figure 4: Before the event drop-down

This setting determines how much lead time you will have from the time a booking is made until the meeting time. For example, let’s say you create a lead time of three hours. A Customer who is on your Booking page at 1 PM will not be offered time slots before 4 PM. This setting provides for a lot of flexibility, ranging from a few minutes to a few days or weeks.

Into the future

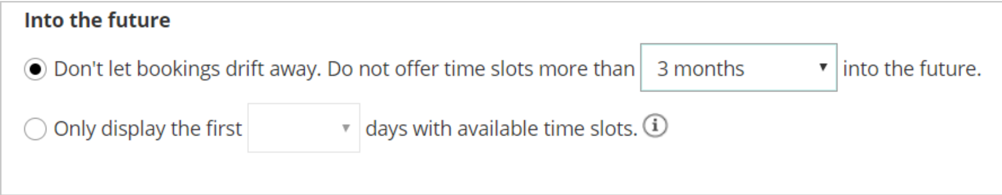


Figure 5: Into the future options

This setting determines how far in advance Customers can make bookings with you. You can limit Customers' choice to book into the future in one of two ways:

1. **Count nominal time:** This time is counted independent of whether any slots are available or not in the specified period.
2. **Only count days with available time slots:** This is based on your availability settings, minus blocked busy times and any previously scheduled meetings.

Use the radio buttons to select between the two methods.

Nominal time method

Generally, this method is more useful for **longer periods like weeks and months.** The default for this setting is 18 months, and you can set it for as short as 12 hours.

For example, when your **Into the future** setting is set to four weeks, we show your Customer the next four weeks regardless of whether you have any available slots during this period or not. Days where you do not have any availability on your calendar still count towards the total number of days shown. In this example, your Customer may see anything from 28 days to 0 days to choose from, depending on how much availability is on your calendar inside the specified time frame.

Available time slots method

Generally, this method is more useful for **shorter periods of several days.** Typical use cases where the availability-based method comes in handy include:

1. **Business days:** Set the number of days your Customer can schedule in a way that skips weekends and holidays. Any blocked days in your calendar, or days with no availability, will not be counted towards the set number of days to display.
2. **Allow your Customer to schedule in the next few days:** Limit your Customer's options to an exact number of days to choose from. Elegantly battle Customers' tendency to procrastinate!
3. **Maximize your time utilization:** One of the ways to maximize time utilization is to fill up one day at a time, before opening another day for booking. Set the number of days to one to achieve this.

How does it work?

We take the availability you specified in the Recurring availability and Date-specific availability sections of your Booking page, and deduct all your busy time (from your connected calendar or from events scheduled via OnceHub), all subject to your time slot rules. The result is that your Customer will see a specified number of days into the future that currently have available time slots. Any days with no open slots will **not** be counted: days with no availability, fully-booked days and days blocked due to time slots rules. Selection options are between 12 hours and 30 days.

Consider the following example:

Your availability is set to Monday to Friday. On the upcoming Thursday, you have an all-day meeting in your connected calendar. The upcoming Friday is fully booked by OnceHub meetings.

Your **Into the future** setting is set to two days of actual availability. A Customer that opens your Booking page on Wednesday will be able to choose between Wednesday and the following Monday.

Let's see why:

- Wednesday is shown because it has available slots.
- Thursday is skipped because it is blocked by the all-day event in the connected calendar.
- Friday is skipped because it is blocked by OnceHub events.
- Saturday and Sunday are skipped because you did not specify availability on these days.
- Monday is shown because it is the next day with available slots.

Setting actual availability ensures that your Customer is always offered the predefined number of available days to choose from.

Time zone conversion

Last Modified on Oct 11, 2022

If you're offering bookings to Customers in multiple time zones, you can use Time zone conversion settings when they book with you.

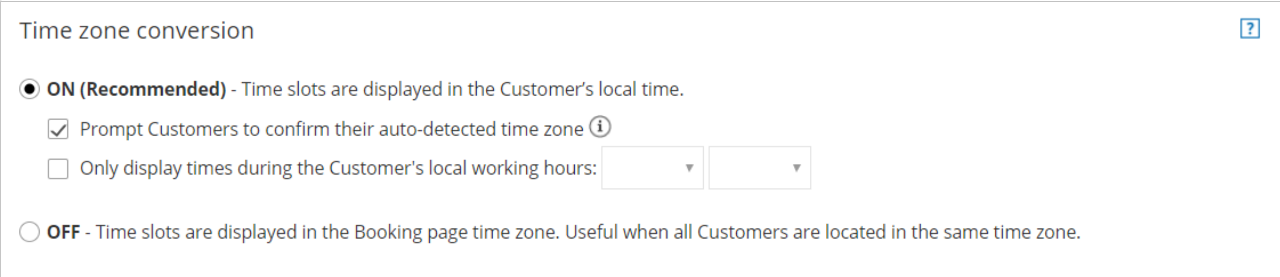


Figure 1: Time zone conversion

In this article, you'll learn about using the Time zone conversion settings.

Location of the Time zone conversion section

You can find **Time zone conversion** settings under **Time slot settings**. The location of the **Time slot settings** depends on whether or not your Booking page has any Event types associated with it. Learn more about the location of the Time slot settings section

- For Booking pages **associated** with Event types (recommended), go to **Booking pages** in the bar on the left → select the relevant **Event type → Time slot settings**.
- For Booking pages **not associated** with Event types, go to **Booking pages** in the bar on the left → select the relevant **Booking page → Time slot settings**.

Time zone conversion: ON

This is the default setting for time zone conversion. When you select this option, the Customer's time zone is automatically detected according to their IP address.

When the Customer accesses your Booking page, they will see a confirmation pop-up asking them to verify that the detected time zone is correct (Figure 2). As a result, all time slots will be displayed to the Customer in their local time zone.

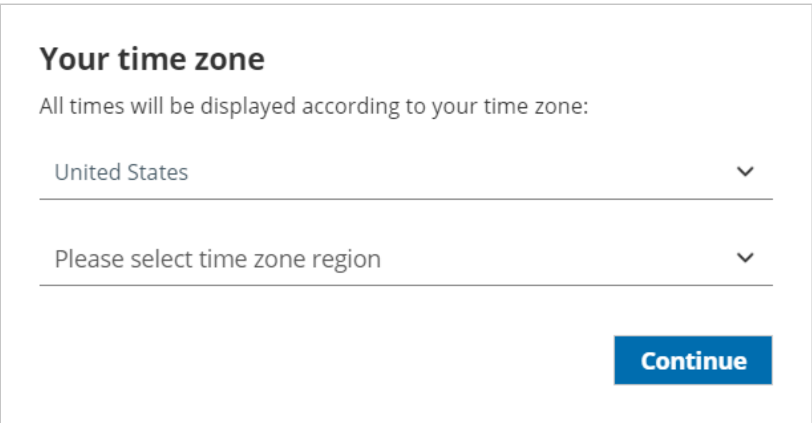


Figure 2: Time zone confirmation pop-up

When **ON** is selected, there are two additional options:

Prompt Customers to confirm their auto-detected time zone

- When **checked** - Customers must always confirm their time zone.
- When **unchecked** - Customers confirm their time zone only if auto-detection fails.

Only display slots during the Customer's local working hours

This option is recommended if you're working with clients and prospects whose time zone is multiple hours apart from yours. When you select this option, the Customer will only see time slots that fall within the Customer's local working hours that you have defined.

For example, say you're in the US Eastern time zone and have availability from 9am - 5pm. Some of your Customers are in the UK with a 5-hour time difference.

- Without the working hours restriction, your UK Customers will see 2pm - 10pm availability in their local time zone.
- With the working hours restricted to 9am - 5pm, they will only see 2pm - 5pm, which are the times that make more sense for their local working hours.

Time zone conversion: OFF

Select this option if your Customers are all local and you're sure that no one will schedule from a time zone that is different from the one that you are in. In this case, the Customer will not be asked to verify a time zone and no time zone will be displayed to the customer. As a result, all time slots will be displayed in your chosen time zone.

You should also choose this option if your Booking page is offering appointments for a conference or other event. For instance, attendees might come from all over the world to a conference in New York. They might book the appointment ahead of time, from their home in another state or country. However, they need to book the appointment in Eastern Time only. Turning time zone conversion off will ensure they select only times relevant to the conference location.

Learn more about scheduling for conferences

Note:

You cannot disable the time zone conversion when using dynamic rules or resource pools. If you would like to turn off the time zone conversion for a booking using dynamic rules or pooled availability, use the automatic time zone conversion feature and leave a note in the Master page instructing Customers to select the correct time zone manually.

Number of time slots offered per day

Last Modified on Oct 11, 2022

You have the option to limit the number of slots you offer per day. There are a number of reasons to limit the maximum time slots offered per day, including:

- Looking busier than you really are.
- Making an effort not to overwhelm Customers with too many choices.
- Preventing Customers from selecting adjacent time slots in Booking with approval mode.

If you want to limit the maximum number of available time slots per day, you can do so using the **Number of time slots offered per day** setting under under **Time slot settings** (Figure 1).

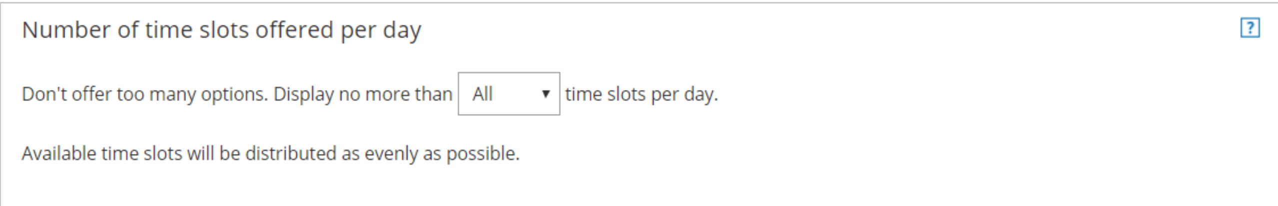


Figure 1: Number of time slots offered per day

The location of the **Time slot settings** depends on whether or not your Booking page has any Event types associated with it.
Learn more about the location of the Time slot settings section

- For Booking pages **associated** with Event types (recommended), go to **Booking pages** in the bar on the left → select the relevant **Event type → Time slot settings**.
- For Booking pages **not associated** with Event types, go to **Booking pages** in the bar on the left → select the relevant **Booking page → Time slot settings**.

Limiting the number of time slots

When you limit the number of time slots available per day, OnceHub distributes these time slots as evenly as possible across the availability set for that Booking page.

For example, say you have availability from 9 AM to 5 PM. You want to limit the number of time slots offered to 3 time slots per day. Time slots will be offered at 9 AM, 12 PM, and 3 PM. If someone books the 9 AM time slot, this time slot disappears and a new time slot will be offered to the next Customer at 9:30 AM.

If you don't want this setting to affect you, simply keep it at its maximum: **All** time slots.

Important:

This setting **does not** limit the amount of appointments that can be booked on any given day. Rather, it affects the amount of time slots which a Customer may choose from when they select a time for their booking. If you want to put an absolute limit on the number of bookings per day, this is available through the Workload rules settings.

Limiting the number of bookings per day or per week

Last Modified on May 1, 2023

In the Workload rules section of the Time slot settings, you can set a cap on the number of bookings that can be made in a given day or week.

- **When you set a cap on the number of bookings per day:** the entire day will become unavailable when the cap is reached and no more bookings will be accepted.
- **When you set a cap on the number of bookings per week:** the entire week will become unavailable when the cap is reached and no more bookings will be accepted.
- **When you use both settings together:** the setting with the strongest restriction overrides the other setting. For example, if the number of bookings per day is set to 1 and the number of bookings per week is set to 3, the entire week will be blocked after 3 single-day bookings.

This is straightforward when working with Booking pages only. In this case, the **Time slot settings** are located on the Booking page and the cap applies to all bookings. But how do these settings work when the Booking page is linked to Event types?

Using Booking pages associated with Event types

When you associate an Event type with a Booking page, all the **Time slot settings** are moved to the Event type. This means that the number of bookings per day and number of bookings per week are defined by Event type.

However, when multiple Event types are associated with a Booking page, the overall count on the number of bookings remains according to the Booking page.

See below some possible scenarios when a single Booking page is linked to two Event types.

Example 1: Setting the cap on the number of bookings per day

When you set the maximum number of bookings per day to three on **each** Event type, the maximum bookings per day **is equal to the highest limit** and not the sum of both limits.

So in this case, it is possible to create 1 booking from Event type A and 2 bookings from Event type B, or any other combination that results in a total of 3 bookings overall. The maximum number of bookings per day will always be 3, not 6.

> **Note:**
>
> If you would like to allow 3 bookings per day from each Event type (for a total of 6 bookings per day), you should associate each Event type with a different Booking page.

Example 2: Setting the cap on the number of bookings per week

When you sets the maximum number of bookings per week to three on **each** Event type, the maximum bookings per week **is equal to the highest limit** and not the sum of both limits.

So in this case, it can be possible to create one booking from Event type A and two bookings from Event type B, or any other combination that results in a total of 3 bookings overall. The maximum number of bookings per week will always be 3, not 6.

Note:

If you would like to allow three bookings per week from each Event type (for a total of 6 bookings per day), you should associate each Event type with a different Booking page.

Example 3: Setting the cap on the number of bookings per day and per week, using multiple Event types with same settings

Say you have a Booking page that is linked to two Event types. Both Event types set a maximum number of three bookings per week and one booking per day. This means that the maximum bookings for each Event type is equal to three per week (the setting with the strongest restriction).

So in this case, it is possible to create only three single-day bookings per week from Event type A or Event type B. The maximum number of bookings per week will always be 3, not 6.

Example 4: Setting the cap on the number of bookings per day and week, multiple Event types with different settings

In the example above, let's consider a situation where Event type A and Event type B have different settings.

- Event type A can accept a maximum of three bookings per week and two bookings per day, which means that the maximum bookings for Event type A is equal to three (the setting with the strongest restriction).
- Event type B can accept a maximum of two bookings per week and one booking per day. It means that the maximum bookings for Event type B is equal to two (the setting with the strongest restriction).

In this case, the maximum number of bookings is equal to the **highest limit of both Event types**, not the sum of both limits. So in this case, it can be possible to create one booking from Event type A and two bookings from Event type B, resulting in a total of three bookings. The maximum number of bookings per day is 2 (two bookings from Event type A, or one from Event type A and one booking from Event type B) . The maximum number of bookings per week will always be 3, not 5.

Introduction to the Booking form and redirect section

Last Modified on Oct 11, 2022

In the **Booking form and redirect** section, you can define the meeting subject, the Booking form you wish to use, and the redirect options when your Customer makes a booking.

You can also decide to skip or prepopulate the Booking form when a Customer makes a booking. This can be achieved when Customer data is passed to your Sharing links or Publishing options.

Location of the Booking form and redirect section

The location of the Booking form and redirect section depends on whether or not your Booking page has any Event types associated with it.

- For Booking pages **associated** with Event types, go to **Booking pages** in the bar on the left → select the relevant **Event type → Booking form and redirect** section (Figure 1).

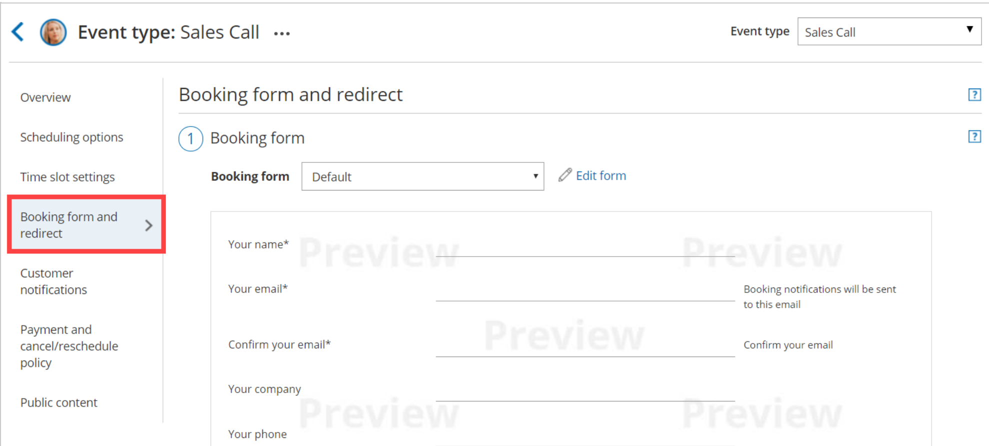


Figure 1: Booking form and redirect section on Event type

- For Booking pages **not associated** with Event types, go to **Booking pages** in the bar on the left → select the relevant **Booking page → Booking form and redirect** section (Figure 2).

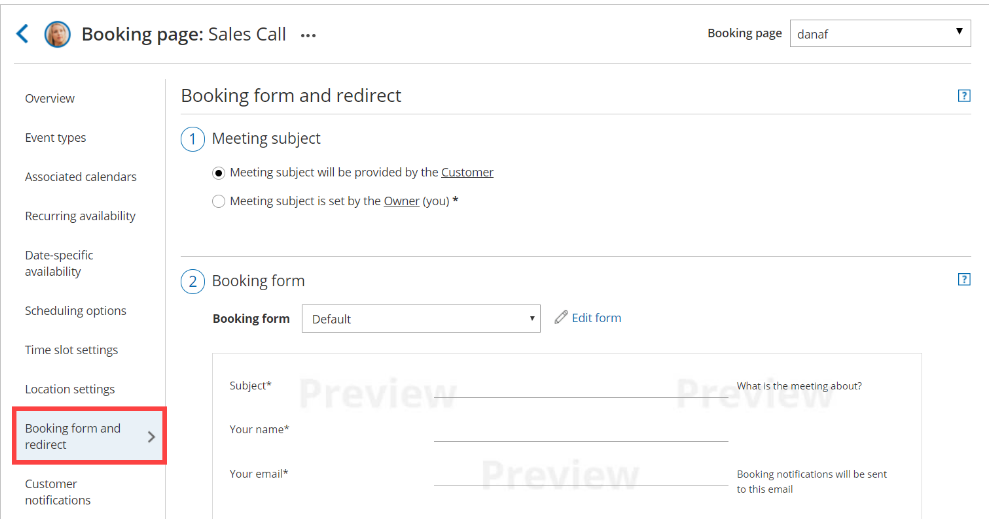


Figure 2: Booking form and redirect section on Booking page

Important:

You can change the location of the **Booking form and redirect** section to be located on the Booking page or the Event type. To set the location, go to **Booking pages** in the bar on the left → **Event types** pane→ action menu (three dots) → **Event type**

sections. Learn more about Event type sections

Meeting subject

You can choose if you want the meeting subject to be set by the Owner (you) or by the Customer (Figure 1).

If you choose to let the Customer provide the meeting subject, it will be a required field on the Booking form. The Customer will not be able to make a booking without completing this field.

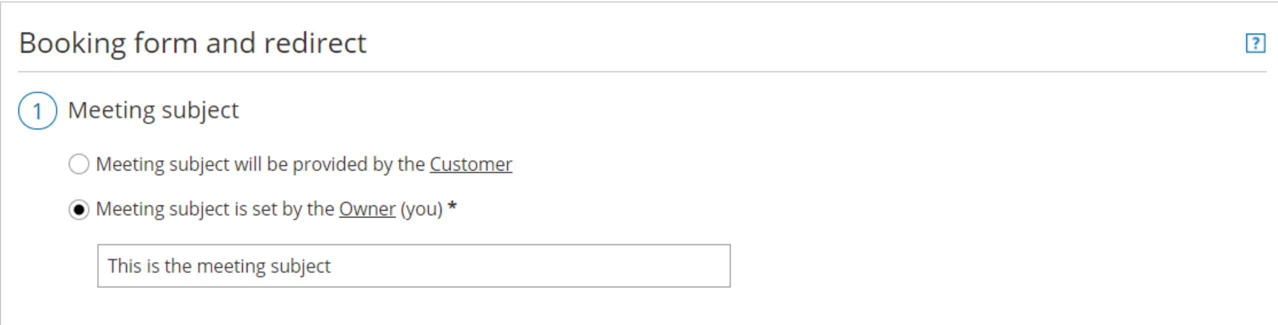


Figure 1: Meeting subject

When your Booking page is associated with an Event type, this section will not be visible. The meeting subject is set by default to the Event type name and cannot be changed.

Note:

If the Booking form is skipped and the Meeting subject is set by the Customer, the Meeting subject is automatically set to *Personal meeting*.

Booking form

The drop-down menu contains the Booking forms that have been created in the Booking forms editor. A preview of the Booking form can be seen below the drop-down menu. The preview includes all the fields in the Booking form, in the exact order in which they will appear to your Customers.

If you wish to edit the Booking form, click **Edit form**. Learn more about the Booking forms editor

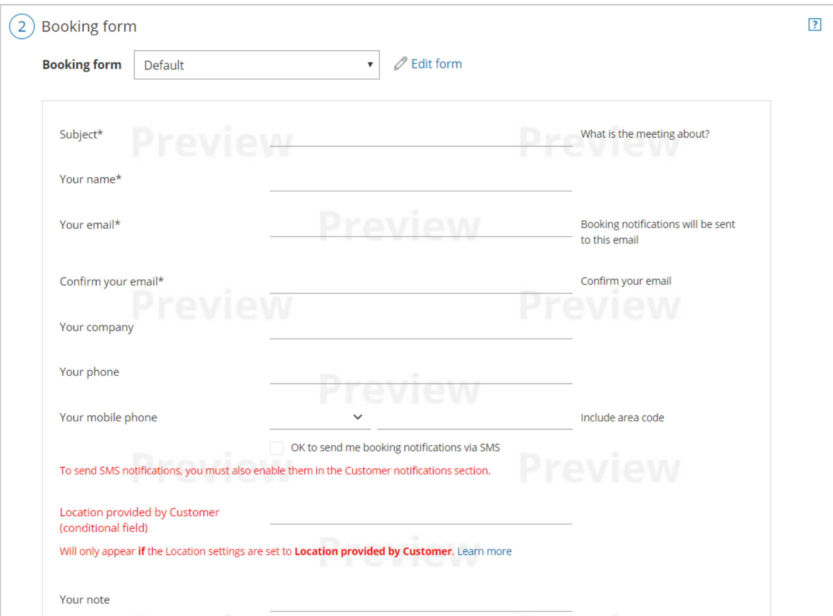


Figure 2: Booking form

Automatic redirect

This setting allows you to decide what will happen after your Customers complete the booking process.

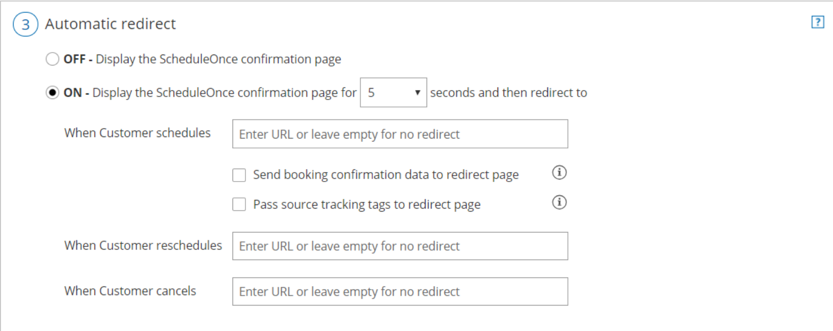


Figure 3: Automatic redirect

When Automatic redirect is set to **OFF**, the Customer will see a comprehensive confirmation page with the meeting information. This is the default setting.

When Automatic redirect is set to **ON,** the Customer will be automatically redirected to a web page of your choice when the booking is submitted.

- This can be used to redirect the Customer to a thank you/landing page or to a payment page.
- Another use case is to measure the effectiveness of your marketing campaigns by adding tracking code such as Adwords, Facebook pixel or Google Analytics code to the redirect target page.
- You can also pass source tracking tags to the redirect page, or redirect booking confirmation data to a custom confirmation page.

Separate fields are provided for scheduling, rescheduling and canceling redirect target pages. You can use the same URL for all three processes, or enter different URLs to serve each purpose. Note that automatic redirect can also be used when the page is embedded.

Collecting Customer data with Booking forms

Last Modified on Jun 2, 2023

Booking forms allow you to collect information from your Customers when they make a booking. After selecting a date and time, Customers reach the Booking form step and provide the information required to complete the booking.

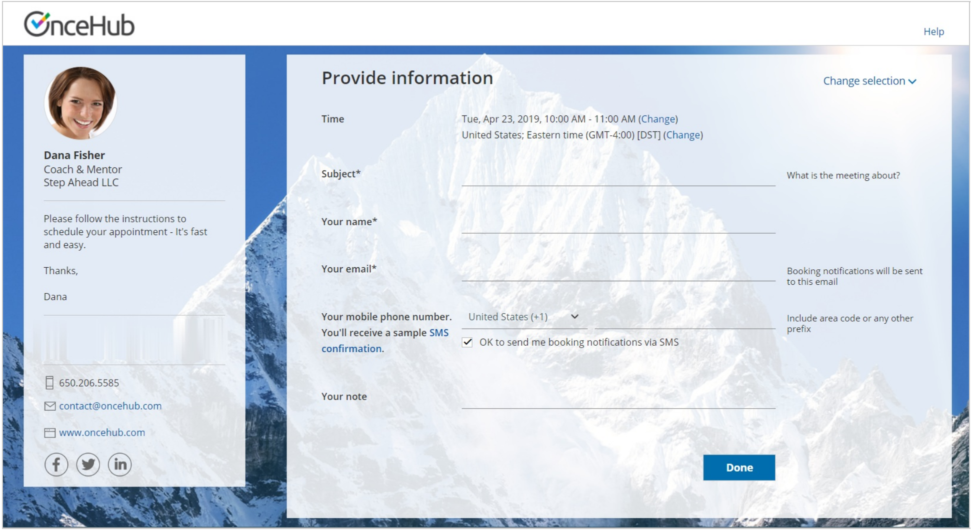


Figure 1: Sample Booking form

In this article, you'll learn about about collecting and utilizing Customer data using Booking forms.

Booking form fields

You can create and customize as many Booking forms as you need using the Booking forms editor. Each form can have its own set of fields in a specified order.

The Booking form always contains the name and email fields, which are mandatory OnceHub fields, plus any System fields or Custom fields you choose to add. You can choose to make these additional fields either mandatory or not.

Some **System fields** will be conditionally added to the form. For example: if you choose to let the Customer set the meeting subject, this field will be automatically added to the Booking form.

The graphic style of the fields is determined by the theme you set in the Theme designer. The graphic style can be either Modern (fields as underlines) or Classic (fields as boxes). By default, the graphic style is set to Modern.

Finding Customer data

All Customer data collected in the Booking form is available to you via the following methods:

- Email notifications, reminders and calendar events (unless set otherwise by creating custom notification templates)
- The Activity stream
- Reports

Selecting a Booking form

When you have multiple Booking forms, you can choose which Booking forms will be used for different scenarios. Booking forms can be related either to Booking pages or Event types.

By default, the location of the Booking form section depends on whether or not your Booking page is associated with any Event types.

- Booking pages **with Event types**: Each Event type has its own Booking form, set in the **Event types's** Booking form section.
- Booking pages **without Event types**: The Booking form is selected in the **Booking page's** Booking form section.

However, you can customize the location of the Booking form section.

Skipping or prepopulating Booking forms

It's not always necessary to collect Customer information as part of the scheduling process. For example, you may already have the data in your CRM.

In these cases, the Booking form is typically skipped completely if you have all the data needed, or prepopulated if you require additional data. Prepopulated Booking forms work in private mode or public mode depending on the source of the prepopulation data. Learn more about prepopulated forms

The Booking form is typically skipped or prepopulated in the following scenarios:

- **Personalized links:** When you invite an existing prospect or Customer to schedule, their information is already known to you. You can send them a Personalized link from Salesforce or Infusionsoft to save them the time of filling out redundant information. If you are not using our native CRM integration, you can create a Personalized link using URL parameters.
- **Web form integration:** The Customer filled out your web form, so their data is already available to you or stored in your CRM. This data can be passed to OnceHub as parameters in the URL or as a CRM record ID (Salesforce or Infusionsoft).
- **Login integration:** When the Customer is authenticated in your app or portal, their identity is known to you. You can pass their CRM record ID (Salesforce or Infusionsoft) or parameters like name or email, and the Booking form will be skipped or prepopulated for them.
- **Landing page:** You send your Customer an email (possibly as part of a campaign) with a link to a landing page (any web page that offers scheduling). That email link is personalized with the Customer data (using URL parameters, Salesforce ID or Infusionsoft ID), and the data is passed to the landing page. The landing page allows the Customer to schedule and all their data is seamlessly passed on to OnceHub, so they don't need to refill known values.

Prepopulated Booking forms

Last Modified on Jun 2, 2023

It's not always necessary to collect Customer information as part of the scheduling process. For example, you may already have the data in your CRM. In these cases, the Booking form is typically skipped completely (if you have all the data you need) or prepopulated (if you require additional data).

Prepopulated Booking forms

When the Booking form is prepopulated, it can operate in two modes: private or public. The mode of the Booking form depends on the source of the prepopulation data provided. Prepopulation data can originate from two sources:

- Parameters passed in the URL to the Booking page.
- Customer information stored in a Database such as your CRM or OnceHub account.

Prepopulation with URL Parameters

Prepopulation data provided directly in the Public link (as URL parameters) is visible in the browser address bar. By definition, this information is not private. When forms are prepopulated with data from URL parameters, the form displays the information publicly (Figure 1). In public mode, the data is visible and can be edited by the Customer before submission.

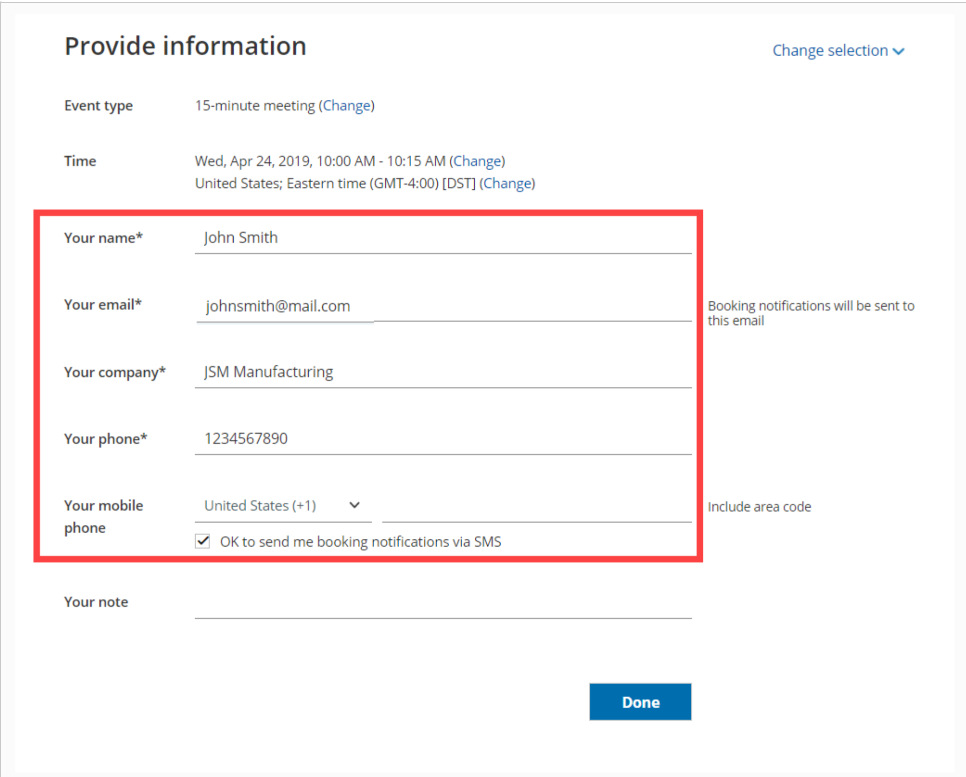


Figure 1: Booking form with data prepopulated from URL parameters

Prepopulation with Customer data stored in a database

We are committed to keeping Customer data safe and secure. We have added a layer of security for bookings made with contacts stored in databases, such as your Infusionsoft CRM or Salesforce CRM.

If the prepopulation data is from a database, the form works in private mode. In private mode, prepopulated data can't be viewed or edited by the Customer before submission. The prepopulated data used in the Booking is indicated as a checklist and the Customer can provide additional information if required.

Note:

To use data from a database in a prepopulated Booking form, you first have to connect to Infusionsoft or connect to Salesforce.

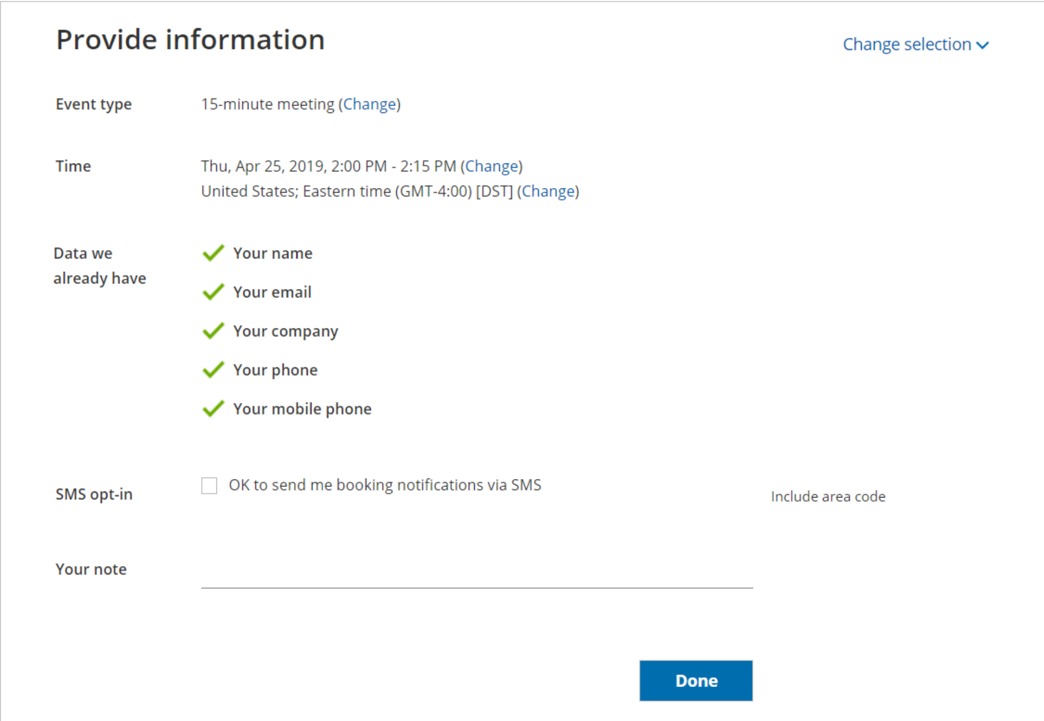


Figure 2: Data prepopulated from a database

Private mode is automatically used when necessary (no configuration is required). It is enabled:

- When you use a record ID from your CRM to prepopulate the Booking form.
- When a customer reschedules an existing appointment and additional data is required to complete the booking. If no additional data is required, the Booking form step will be skipped during rescheduling.

Private mode protects customer privacy. Customer data from your CRM or OnceHub account should not be visible on a page accessible from the web. Click here to see the OnceHub Privacy Notice.

Note:

For security and privacy reasons, using CRM record IDs to skip or prepopulate the Booking form is not compatible with collecting data from an embedded Booking page or redirecting booking confirmation data.

Automatic redirect

Last Modified on Dec 7, 2023

You can automatically redirect your customers to different web pages after they schedule, reschedule or cancel a booking.

In this article, you'll learn about the automatic redirect settings.

Configuring the automatic redirect

You can configure the automatic redirect in the **booking form and redirect** section. The location of the booking form and redirect section depends on whether or not your booking page has any event types associated with it.

- For booking pages **associated** with event types, go to **booking pages** in the bar on the left → select the relevant **event type → booking form and redirect** section.
- For booking pages **not associated** with event types, go to **booking pages** in the bar on the left → select the relevant **booking page → booking form and redirect** section.

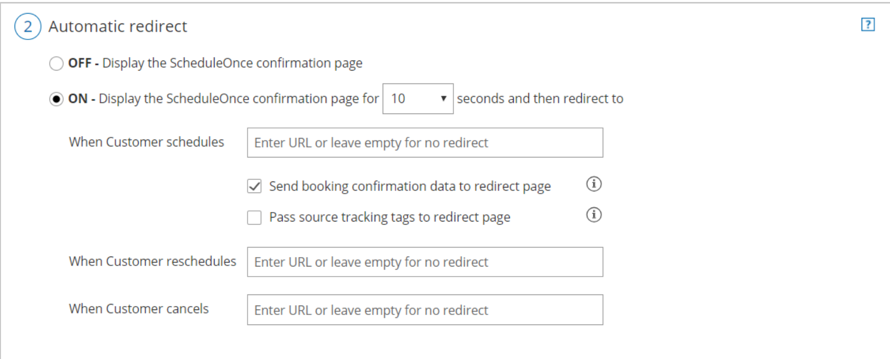


Figure 1: Automatic redirect settings

Important:

You can change the location of the **Booking form and redirect** section to be located on the Booking page or the Event type. To set the location, go to **Booking pages** in the bar on the left → **Event types** pane → action menu (three dots) → **Event type sections**. Learn more about Event type sections

Automatic redirect set to OFF

This is the default option. When Automatic redirect is set to **OFF**, the Customer will see the Booking confirmation after they schedule, reschedule or cancel a booking.

This page gives the Customer information about the booking that they've just made. It also gives the Customer the option to download the meeting's ICS file into their calendar.

If you're working in Booking with approval mode, the confirmation page will display the requested times that the Customer gave as options. If you're using Session packages, the meeting time for every session will be displayed.

Automatic redirect set to ON

When Automatic redirect is set to **ON**, the Customer will be automatically redirected from the Booking confirmation page to the URL of your choice.

You can redirect immediately after the schedule, reschedule or cancellation process is completed, or choose to have the Customer stay on the confirmation page for a short amount of time and then be redirected.

You can also choose to redirect to different pages when a Customer makes a new booking, reschedules or cancels. Redirect will only take place if a URL was provided.

> **Note:**
>
> Automatic redirect can also be used when the page is embedded.

Using Automatic redirect

If enabled, Automatic redirect takes effect after the Customer completes a scheduling, rescheduling or cancellation process.

By default, all booking processes end on the confirmation page. Automatic redirect allows you to skip this confirmation page completely, or show it for a limited time and then redirect to a page of your choice.

You can also pass source tracking tags to the redirect page, or redirect booking confirmation data to a custom confirmation page.

Automatic redirect is used for several purposes:

- **Align with your business process:** After scheduling, Customers can fill out a form or perform additional steps.
- **Measure your campaign effectiveness:** You can accurately measure traffic and funnel conversion by adding Google analytics, Facebook pixel, Adwords, or other tracking mechanisms to the redirect target pages.
- **Brand your "thank you" pages:** You can design and create your own "thank you" pages. These can be shown to Customers either after the Booking confirmation page or instead of it.

Introduction to the Customer notifications section

Last Modified on Oct 11, 2022

The Customer notifications section is where you set which notification scenarios will trigger email notifications, SMS notifications, or both to be sent to your Customers. Examples of notification scenarios include: scheduling confirmations, event reminders, event follow-ups, cancellations, and rescheduled bookings.

Location of the Customer notifications section

By default, when your Booking page is associated with Event types, the Customer notifications section is located on the Event type. When your Booking Page is not associated with Event types, this section is located on the Booking page. However, your account Administrator can change the location of this section to be always on either Booking pages or Event types for the entire account.

- For Booking pages **associated** with Event types, go to **Booking pages** in the bar on the left → select the relevant **Event type → Customer notifications** section (Figure 1).

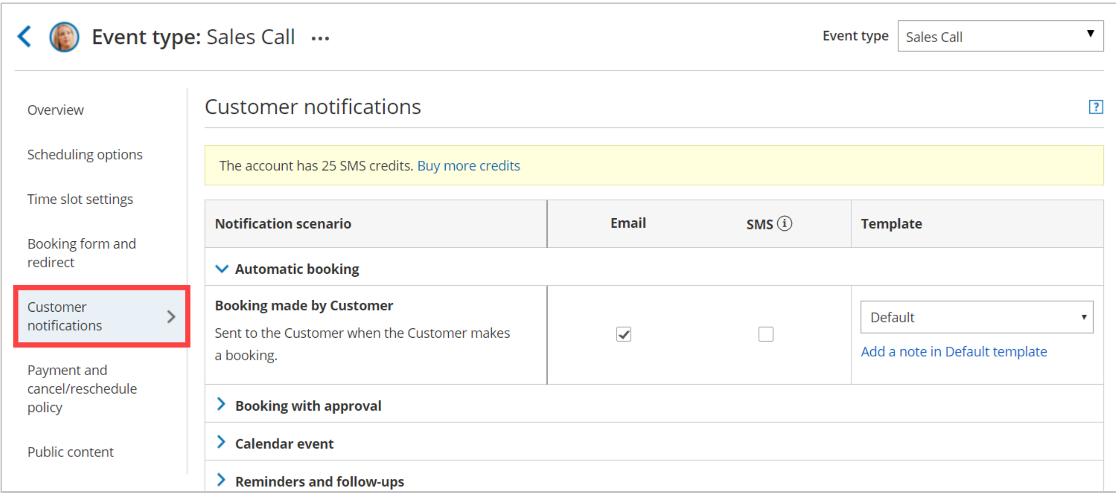


Figure 1: Customer notifications section on Event type

- For Booking pages **not associated** with Event types, go to go to **Booking pages** in the bar on the left → select the relevant **Booking page → Customer notifications** section (Figure 2).

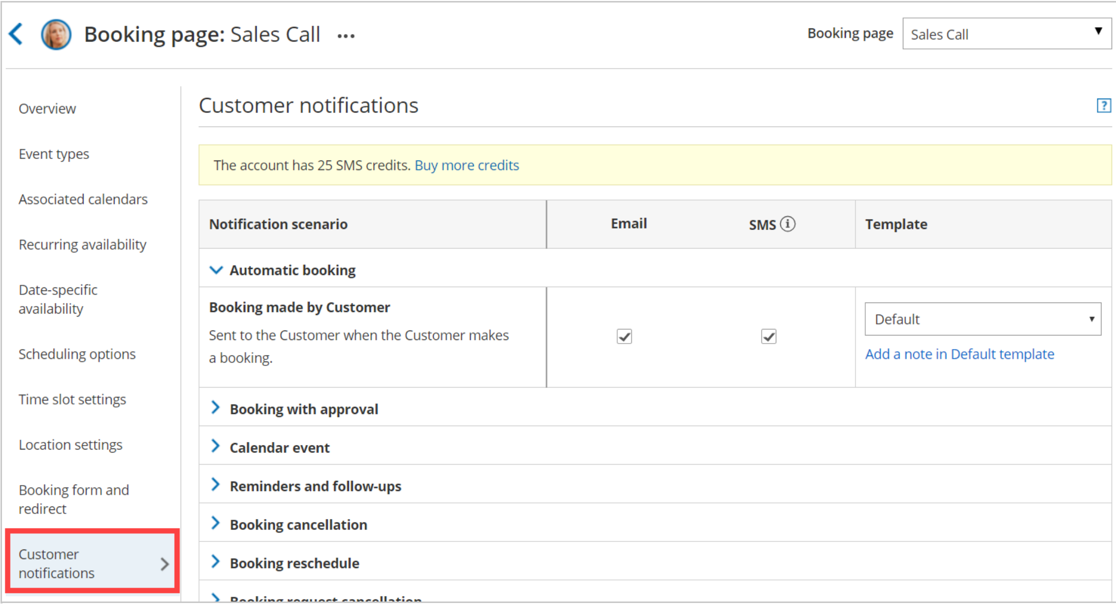


Figure 2: Customer notifications section on Booking page

Configuring notifications

Notification scenarios are booking events that will trigger an email or SMS notification to be sent to the Customer. Learn more about the different Customer notification scenarios and when they apply

> **Note :**
>
> Not all scenarios apply to every situation. For example, the Booking request made by Customer scenario triggers a notification to the Customer when the Customer makes a Booking request. However, this scenario only applies to Booking pages that use Booking with approval mode.

Selecting a delivery method: Email or SMS

You can send an email notification or SMS notification for each Notification scenario, such as the Automatic booking scenario (Figure 3).

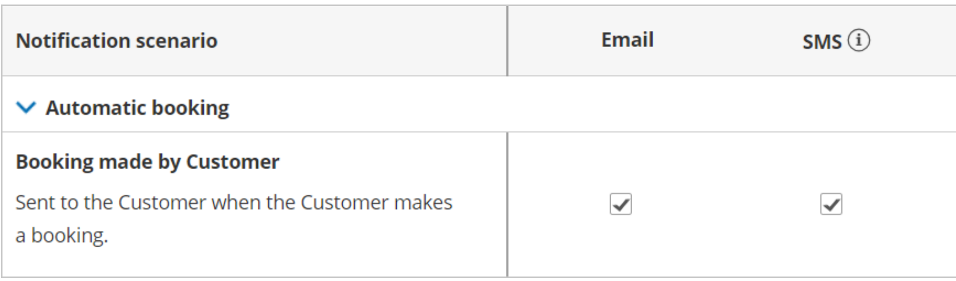


Figure 3: Email notification and SMS notification selected

The exception is the Calendar event scenario, which has no SMS notification option (Figure 4).

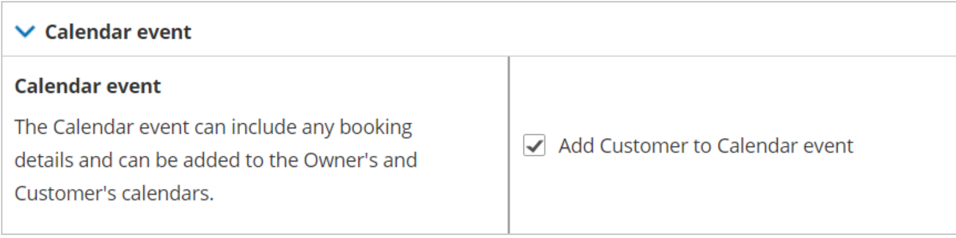


Figure 4: Calendar event notification option

Reminders and follow-ups

You can send up to three Customer reminders before a meeting. You can choose to send a reminder from between 5 minutes to 30 days before the meeting time (Figure 5). By default, email notifications are checked for all three Customer reminders.

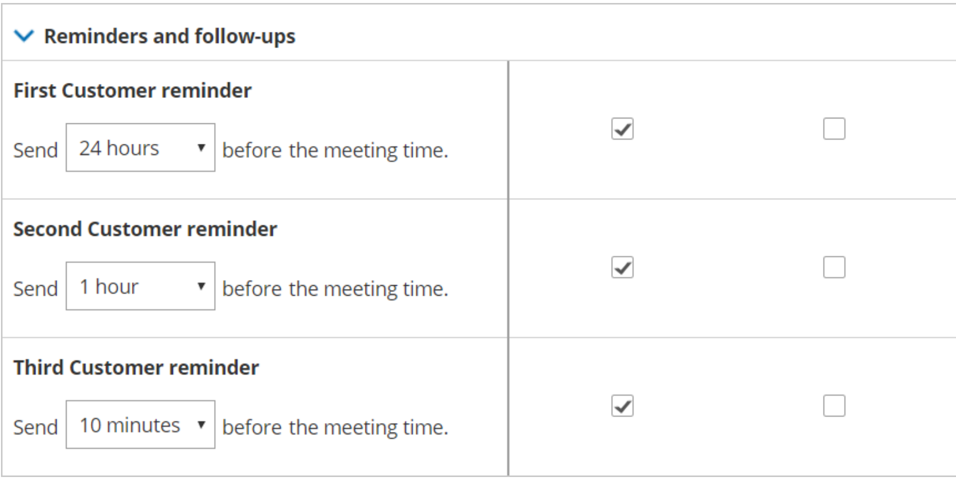


Figure 5: Customer reminder options

You can also send a follow-up message after the meeting. By default, the follow-up message options are unchecked. No follow-up messages will be sent unless you select them. You can choose to send a follow-up message from between 5 minutes to 30 days after a booking (Figure 6).

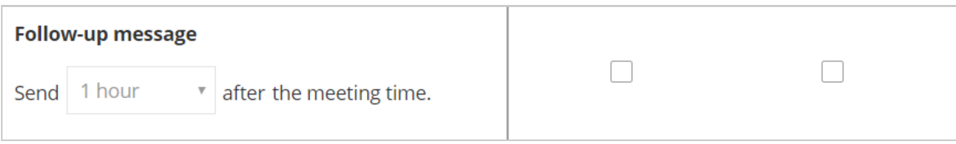


Figure 6: Follow-up message option

Note:

We recommend sending SMS notifications in addition to email notifications. SMS notifications usually short, whereas the notification emails contain all of the important booking information that your Customer will need.

You can create Custom SMS templates that include more information, but the messages will be longer.

Adding personal notes to emails

If you use Default templates, the majority of the content in email notifications and SMS notifications is fixed and cannot be changed. However, you can add a short note to some of the notification emails to make the message more personal and to help the Customer prepare for the upcoming meeting.

For example, if you're a tax consultant, you might want to add a note to your booking confirmation and reminder notifications that says, “Please remember to bring your income statement and bank details to our meeting.”

The length of the note is limited to 10,000 characters. A note can be added by clicking the **Add note in Default template** link under the **Template** drop-down menu (Figure 7).

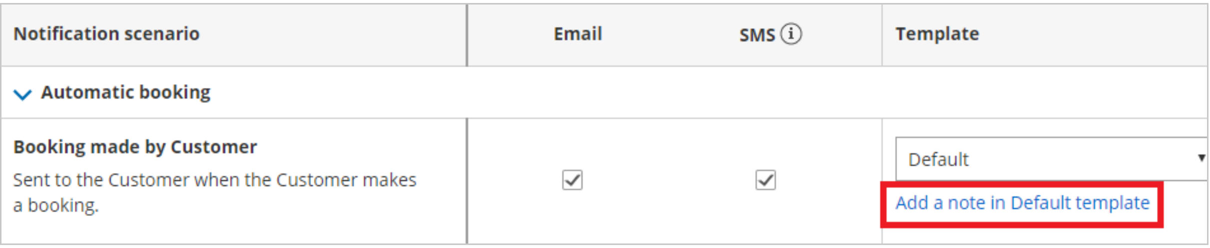


Figure 7: Add a note to your notification email

Adding notes to confirmation emails

You can add a note to the confirmation emails that are sent in the following notification scenarios:

- Booking made by Customer
- Booking request approved by User
- The Calendar event

These three notification scenarios share the same note. If you write a note for one of these emails, it's automatically added to the other two notification emails. Any edits you make in one are also automatically applied to the other two.

Adding notes to reminders

A separate note can be written for Customer email reminders. The email reminders share the same note. If you write a note for one email reminder, it's automatically added to the other email reminders. Any edits you make to one reminder note are automatically applied to the other reminders.

Creating a follow-up email or SMS notification

For the follow-up message option, there's no pre-written text in the Default email template or SMS template. If you want to send a follow-up message to your Customer, you'll need to write your own text by clicking the **Add a note in Default template** link (Figure 8).

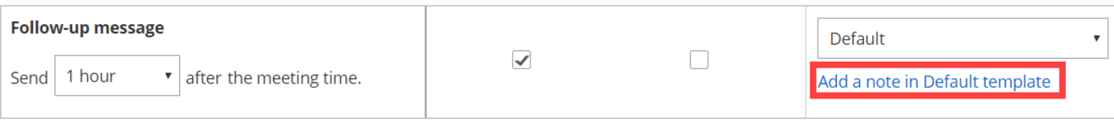


Figure 8: Add a note to your follow-up message

Customizing your notifications further

If you need further customization of your email notifications and SMS notifications, you can use Custom templates. Custom templates give you the utmost flexibility over the content, allowing you to insert images, use any text you want, and add hyperlinks.

The templates you create are available as choices via the drop-down menu in the **Template** column (Figure 9).

Learn more about custom template editors

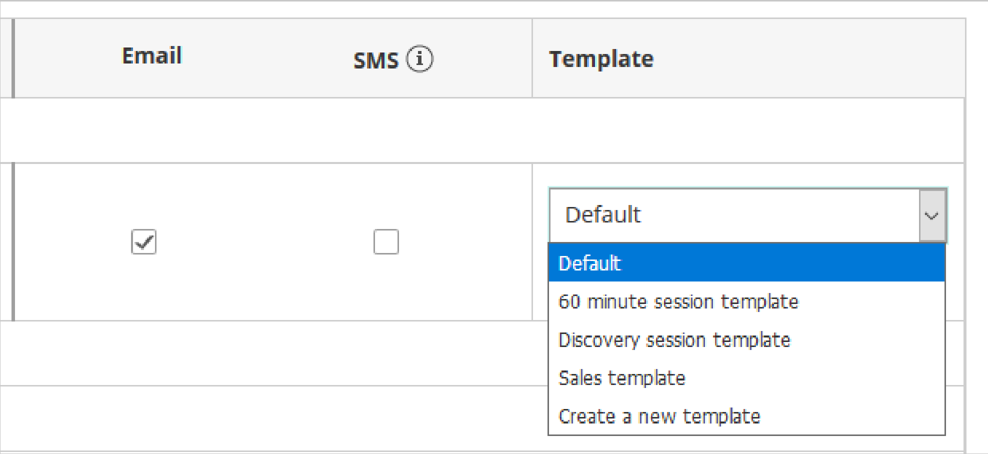


Figure 9: Choosing a custom template

Setting the time for reminder and follow-up notifications

You can send up to three reminders before a meeting and a follow-up message after the meeting. Reminders can be sent up to 30 days in advance and the follow-up message can be sent up to 30 days after your meeting is over. You can choose the timing of the reminders and follow-ups by using the drop-down menus (Figure 10).

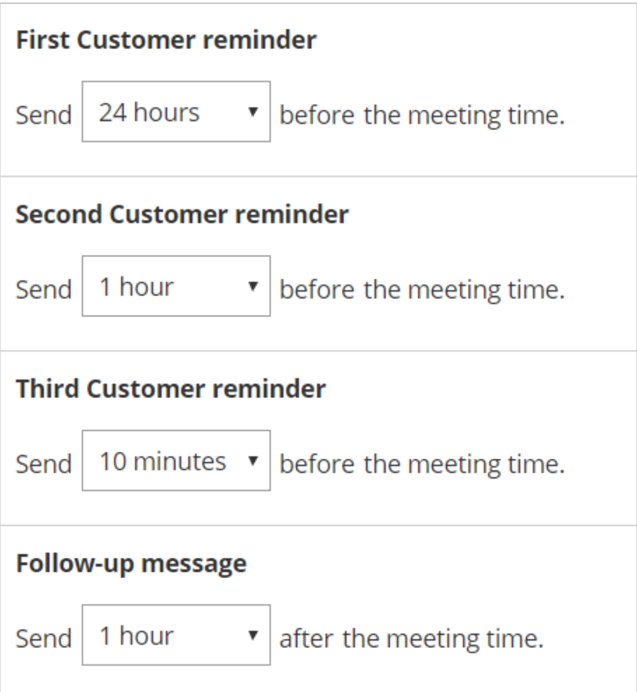


Figure 10: Timing option menus

It's important to think about the best notification timeline for your target audience and how they would like to receive reminders. For example, you may want to send an email notification a week before the meeting time, an email and SMS the day before, and an SMS ten minutes before.

Sending SMS reminders in addition to email reminders gives your Customers additional reminder channels and makes them less likely to miss your meeting. Learn more about sending SMS notifications to your Customers

Notifications to Customers

Last Modified on Jun 2, 2023

When you're scheduling bookings, there are many instances where you might want to send an email or an SMS to your Customer. There are several events on your Customer's journey to making a booking. OnceHub allows you to pick and choose which events your Customers are notified about and which delivery method to use.

For example, you might want to send your Customer an email when a booking is confirmed and an SMS reminder a day before the meeting. The Customer notification settings can be different for every Booking page or Event type. You can set up Customer notifications in a few simple steps.

Templates

You can use our Default templates or create your own. The Default email and SMS templates use text created by OnceHub which provides your Customer with all the important meeting information such as meeting time and location.

1. You can add the Booking page image to all default Customer notification emails except for the **Booking request canceled by Customer** email notification. Including the Team Member's image allows you to engage with your Customers on a more personal level.

> **Note**
> This option is enabled by default for all Booking pages created after December 20th 2015. For Booking pages created before December 20th 2015, you can enable this option in the Booking page Public content section.

2. You can add notes to the Customer's default confirmation email and reminder email templates without changing the rest of the message content (Figure 1). This is done in the Customer notifications section.

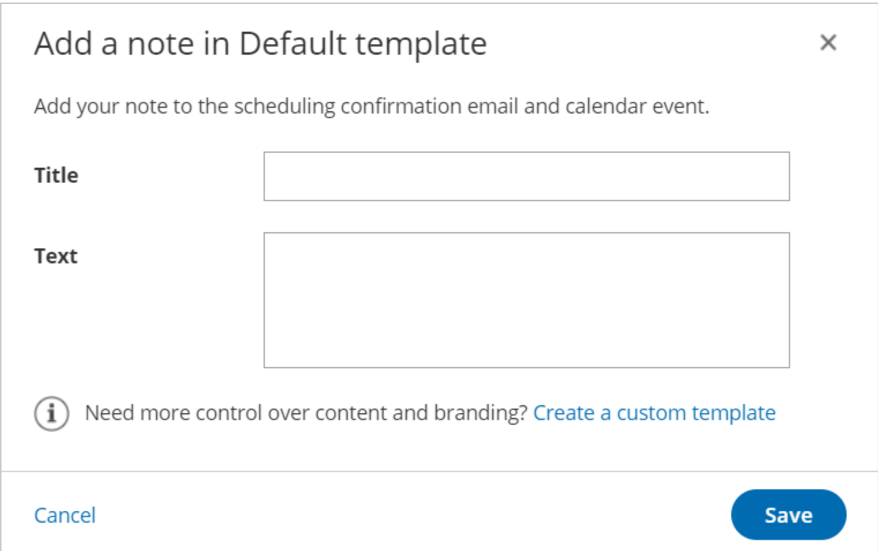


Figure 1: Add a note to a Default template

3. If you want to customize the text or the appearance of your email and SMS messages to your customers, you can create your own templates in the Notification templates editor. You can access the editor by going to **Booking pages** in the bar on the left → **Notification templates editor** in the bar on the left.

Notification scenarios and delivery methods

You can choose the notifications scenarios and delivery methods that suit your needs. The Customer notifications section lists all of the possible notification scenarios that can take place throughout the booking lifecycle. Here are the options that you can select:

- **Scenarios:** Events that can occur during a booking lifecycle.
- **Delivery method:** Email, SMS, or both.
- **Template:** You can choose the Default template or a custom one you created.

When your Booking page is associated with Event types, the Customer notifications section is located on the Event type. When your Booking Page is not associated with Event types, this section is located on the Booking page.

Learn more about the location of the Customer notifications section

> **Note:**
>
> If a Customer invites additional guests to the meeting via the Customer guests feature, those guests will be CCed in all email notifications, but will not receive any SMS notifications.

Collecting a mobile number from the Customer

If you want to send SMS alerts to your Customer, you'll need to collect a mobile number via the Booking form. To do this, you'll need to add the **Customer mobile phone** system field to the Booking form used in your Booking page. Booking forms are created and edited in the Booking forms editor. Go to **Booking pages** in the bar on the left → **Booking forms editor** in the bar on the left.

Learn more about creating a Booking form

> **Note:**
>
> If a Customer does not provide a mobile number or types it incorrectly, SMS notifications will not be delivered.

Customer notification scenarios

Last Modified on Oct 11, 2022

The Scenarios table below defines the Customer notification scenarios used in the Customer notification section of the Booking page. These scenarios are the booking events that can take place during the booking lifecycle. You can choose which scenarios will trigger notifications and if the notifications are sent via email, SMS, or both.

In this article, you'll learn about the different scenarios for using Customer notifications.

Location of the Customer notifications section

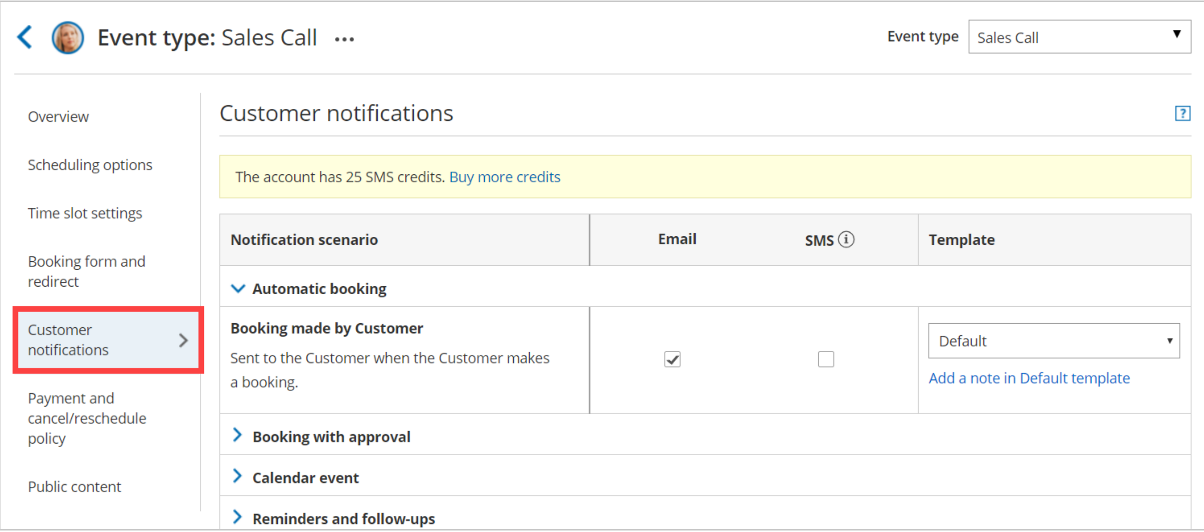


Figure 1: The Customer notifications section on an Event type

By default, when your Booking page is associated with Event types, the Customer notifications section is located on the Event type. When your Booking Page is not associated with Event types, this section is located on the Booking page. However, your account Administrator can change the location of this section to be always on either Booking pages or Event types for the entire account.

Learn more about the location of the Customer notifications section

Scenarios

Notification Scenario	Description
Automatic Booking	
Booking made by Customer	Sent to the Customer* when the Customer makes a booking.
Booking with approval	
Booking request made by Customer	Sent to the Customer* when the Customer submits a booking request.

Booking request approved by User	Sent to the Customer* when a User approves a booking request.
Calendar event	
Calendar event	The calendar event can include any booking details and can be added to the Owner's and Customer's** calendars.
Reminders and follow-ups	
First Customer reminder	Sent to the Customer* at a predefined time prior to the meeting.
Second Customer reminder	Sent to the Customer* at a predefined time prior to the meeting.
Third Customer reminder	Sent to the Customer* at a predefined time prior to the meeting.
Follow-up message	Sent to the Customer* at a predefined time after the meeting ends. *Note: There is no predefined text in the Default email or SMS template. The note you write for the Follow-up message will be the only text the customer will receive.*
Booking cancellation	
Booking canceled by Customer	Sent to the Customer* when the Customer cancels a booking.
Booking canceled by User	Sent to the Customer* when a User cancels a booking.
Booking reschedule	
Booking rescheduled by Customer	Sent to the Customer* when the Customer reschedules a booking.
Reschedule requested by User	Sent to the Customer* when a User sends a reschedule request to the Customer.
Booking request cancellation	
Booking request canceled by Customer	Sent to the Customer* when the Customer cancels a booking request.
Booking request canceled by User	Sent to the Customer* when a User cancels a booking request.
Booking request resubmission	

Booking request resubmitted by Customer	Sent to the Customer* when the Customer resubmits a booking request.
Booking request resubmission requested by User	Sent to the Customer* when a User asks the Customer to resubmit a booking request.
Other notifications	
Manual refund issued by User	Sent to the Customer* when the User issues a refund via OnceHub.

* If the Customer invites additional guests to the meeting via the Customer guests feature, those guests will be CCed in these email notifications, but will not receive any SMS notifications.

** If the Customer invites additional guests to the meeting via the Customer guests feature, those guests will be added as attendees to the calendar event, and receive all subsequent event updates.

Customer calendar event options

Last Modified on Jun 2, 2023

Adding a booking to a Customer's calendar is a critical part in the scheduling process. When the booking is in the Customer's calendar, it's more likely that the Customer will attend the meeting.

In this article, you'll learn about Customer calendar event options.

Calendar event details

By default, the calendar event created by OnceHub includes all the details that were collected during the booking process, including location information, video conferencing information, and all data collected from the Customer via the Booking form.

Note:

The Owner and Customer always see the same calendar event. It is not possible to have different calendar event content for the Owner and Customer. In addition, the Owner's connected calendar event and the ICS file will always have identical content.

If you want to add content that is only seen by the Owner, you should add it to the User notifications. If you want to add content that is only seen by the Customer, add it to the Customer notifications.

Calendar event scenarios

The calendar event experience for your Customers is determined by your calendar connection and whether you choose to add the Customer to the calendar event.

	Owner connected to calendar	**Owner not connected to calendar**
Add Customer to calendar event	The calendar event from the Owner's connected calendar is automatically added to the Customer's calendar.	The ICS file includes the Customer's email as a guest/attendee.
Don't add Customer to calendar event	The calendar event from the Owner's connected calendar is not added to the Customer's calendar.	The ICS file does not include the Customer's email as a guest/attendee.

Learn more about working with or without a calendar

Calendar events in the Owner's calendar

Below are examples of the calendar events that are automatically created in the Owner's connected calendar when a booking is made. Learn more about calendar integration

With the Customer added

When you add the Customer to the calendar event, the calendar event created in your connected calendar will include the Customer as a guest/attendee. This will prompt your connected calendar to send a calendar invite to your Customer. The invite will automatically add the event to their calendar, whether it's a Google Calendar, Office 365 Calendar, Exchange/Outlook Calendar, or iCloud Calendar.

Without the Customer added

When you choose not to add the Customer to the calendar event, the calendar event created in your connected calendar will not include the Customer as a guest/attendee. A calendar invite will not be sent to the Customer. This ensures that your calendar event will not be added to the Customer's calendar under any circumstances.

The ICS file

If the Owner is not connected to a calendar, or if the booking is made for a non-OnceHub User, ICS files will be sent to the Owner in the default scheduling confirmation email.

Learn more about using OnceHub without a connected calendar

With the Customer added

When you add the Customer to the calendar event, the ICS calendar file will include the Customer as a guest/attendee. When you open the ICS file and save it to your calendar, your calendar will ask you if you would like to send a Calendar invite to the Customer. This Calendar invite will add the event to the Customer's calendar, whether it's a Google Calendar, Office 365 Calendar, Exchange/Outlook Calendar, or iCloud Calendar.

Without the Customer added

When you choose not to add the Customer to the calendar event, the ICS calendar file will not include the Customer as a guest/attendee. This ensures that your calendar event will not be added to the Customer's calendar under any circumstances.

Time displayed in the calendar invite sent to your Customer

The calendar event generated by your connected calendar or your ICS file will adjust its time to the Customer's calendar time zone. If your Customers are not professional calendar users, and they have not properly set the time zone in their calendar, the calendar event they receive might have the wrong time.

If this becomes a frequent occurrence, you should not add your Customers to the calendar event. This can be adjusted in the Customer notifications section by unchecking the box marked **Add Customer to calendar event** (Figure 1).

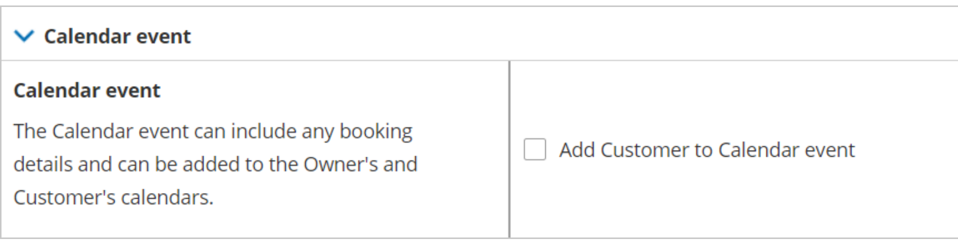


Figure 1: Calendar event option in the Customer notifications section

When you choose not to add the Customer to the calendar event, the Customer still has a good solution available to them. They can simply add the calendar event on their own from the Scheduling confirmation page or the default scheduling confirmation email that is sent to them. This calendar event for the Customer is set to an absolute time and will always have the correct time regardless of the time zone in the Customer's calendar.

Introduction to User notifications section

Last Modified on Oct 11, 2022

The User notifications section is where you set which notification scenarios will trigger email notifications and SMS notifications to be sent to you or to other Users. Examples of notification scenarios include: scheduling confirmations, event reminders, event follow-ups, cancellations, and rescheduled bookings. This section is also where you can customize the text of the notifications sent to Users.

You do not need an assigned product license to subscribe to booking notifications. Learn more

Location of the User notifications section

The User notifications section is located if you go to **Booking pages** in the bar on the left → select your Booking page → **User notifications**.

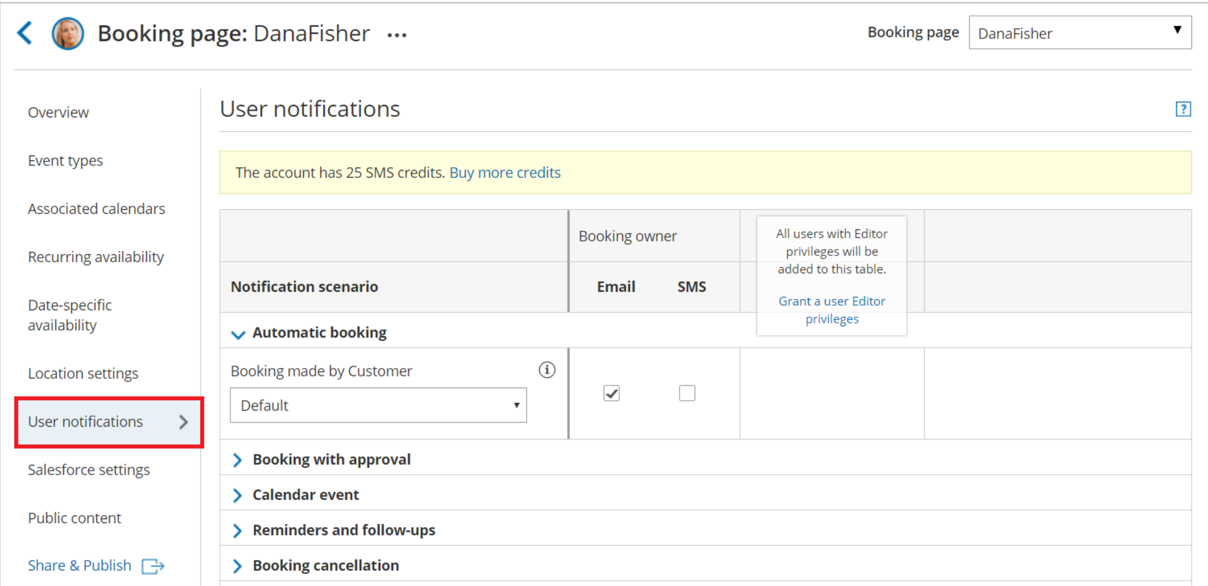


Figure 1: User notifications section

Email and SMS notifications to Users are independent of the notifications sent to your Customers. This means that you can send notifications to Customers that contain different content and have different timing than your own notifications.

Configuring notifications

Notification scenarios are booking events that will trigger an email or SMS notification to be sent to the User. Learn more about the different User notification scenarios and when they apply

> **Note:**
>
> Not all scenarios apply for every situation. For example, the scenario **Booking request made by Customer** triggers a notification when the Customer makes a Booking request. However, this scenario only takes place on Booking pages that use Booking with approval mode.

Selecting a delivery method: Email or SMS

You can send an email or SMS notification for each Notification scenario, such as the **Automatic booking** scenario (Figure 2).

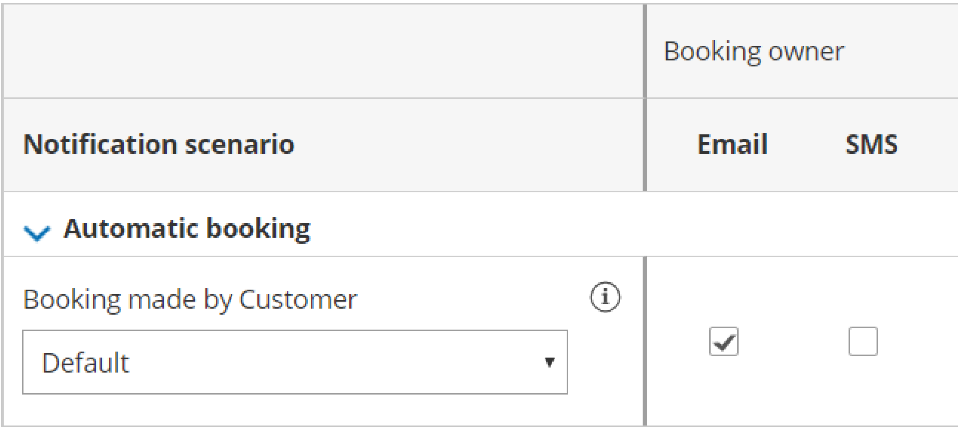


Figure 2: Automatic booking scenario

The exception is the Calendar event scenario, which has no SMS notification option (Figure 4).

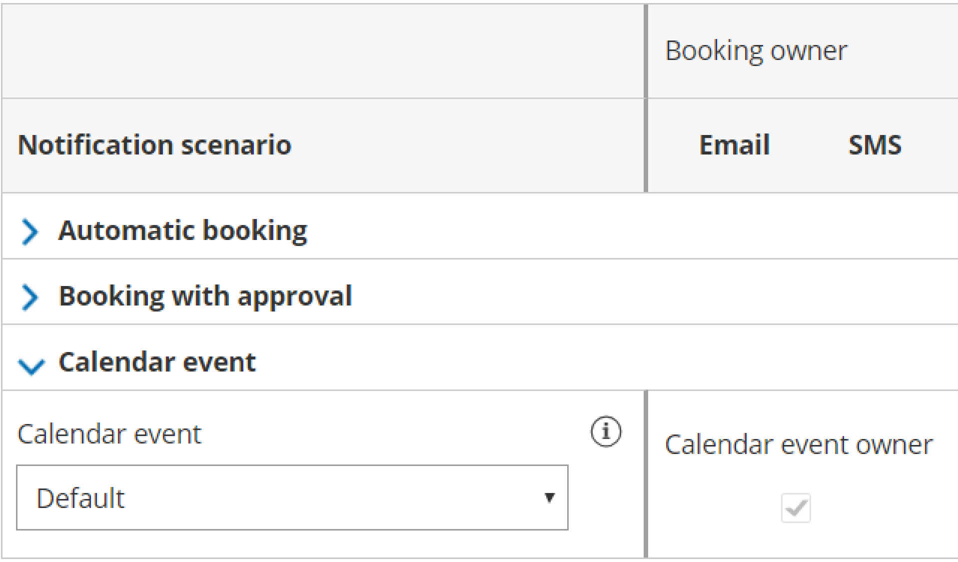


Figure 3: Calendar event scenario

Reminders and follow-ups

You can send up to three User reminders before a meeting and a follow-up message after the meeting. You can choose to send a reminder from between 5 minutes to 30 days before the meeting time (Figure 5). You can choose to send a follow-up message from between 5 minutes to 30 days after a booking.

By default, email and SMS notifications are unchecked for all three User reminders (Figure 4). No notifications will be sent unless you select them.

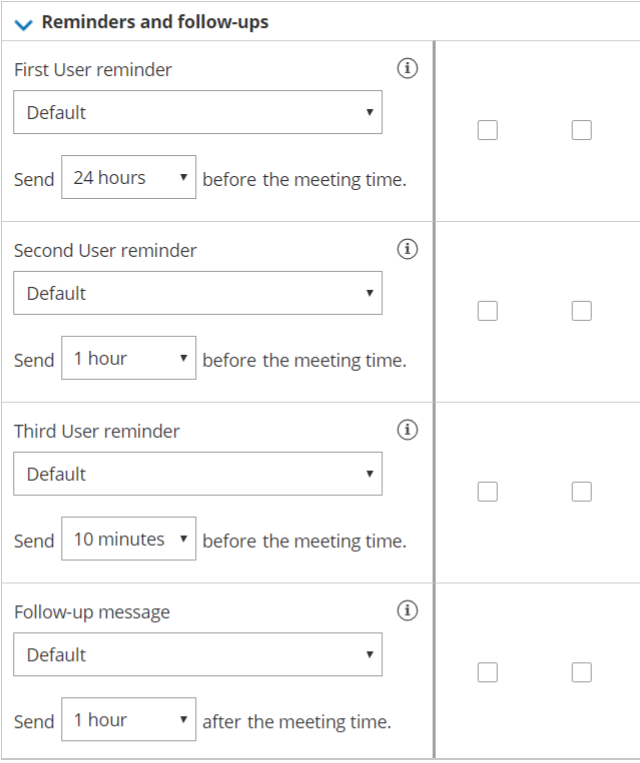


Figure 4: Reminder and Follow-up message scenarios

For other subscribed Users, all notification alerts are unchecked by default.

Note:

We recommend sending SMS notifications in addition to email notifications. SMS messages are usually short, whereas the notification emails contain all of the important booking information that a User will need.

You can create Custom SMS templates that include more information, but the messages will be longer. Learn more about sending SMS notifications to Users

Customizing your notifications further

If you need further customization of your email notifications and SMS notifications, you can create Custom templates in the Notification templates editor. Custom templates give you the utmost flexibility over the content, allowing you to insert images, use any text you wish, and add hyperlinks.

The templates you create are available as choices in each scenario (Figure 5).

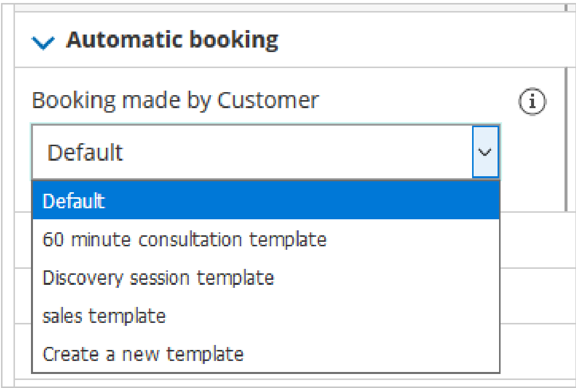


Figure 5: Notification templates drop-down

Setting the time for reminder and follow-up notifications

You can send up to three reminders prior to a meeting and a follow-up message after the meeting is over. Reminders can be sent up to 30 days in advance and the follow-up message can be sent up to 30 days after your meeting is over. You can choose the timing of the reminders and follow-ups by using the drop-down menus (Figure 6).

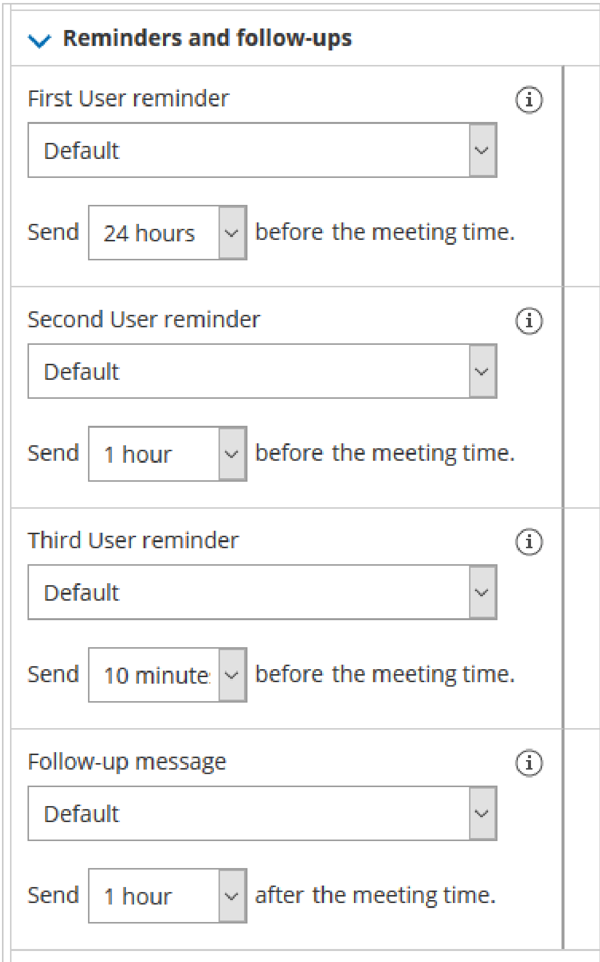


Figure 6: Timing option menus

It's important to think about your schedule and when and how you would like yourself and other subscribed Users to receive reminders. Keep in mind that the User reminders are independent from Customer reminders and can be sent at different times and use different templates than the Customer reminders.

Communicating with Users and stakeholders

Last Modified on Oct 11, 2022

When scheduling bookings, there are many instances where you might wish to send an email or SMS notification to yourself or others in your organization. For example, you might want to send your boss an email when a booking is confirmed and an SMS to yourself the day prior.

You can pick and choose who receives which User notifications related to booking activity. In addition, the User notification settings can be different for every Booking page.

In this article, you'll learn about setting up User notifications.

You do not need an assigned product license to configure User notification templates, though you do need to be an Administrator. Learn more

Templates

You can use our Default templates or create your own. The Default email and SMS templates use text created by OnceHub which provides Users with all the important meeting information such as meeting time and location. Any User who receives a notification using a Default template will receive all the relevant information related to the booking.

If you want to customize the text or the appearance of your email and SMS messages to Users, you can create your own templates via the Notification templates editor. You can access the editor by going to **Booking pages** in the bar on the left and opening **Notification templates editor** on the left.

Learn more about the differences between Default and Custom templates
Learn more about creating Custom templates

Notification scenarios and delivery methods

You can choose the notifications scenarios and delivery methods that suit your needs. The User notifications section lists all of the possible notification scenarios that can take place in a booking. Here are the options that you can select:

- **Scenarios:** Events that can occur during a booking lifecycle.
- **Delivery method:** Email, SMS, or both.
- **Template:** You can choose the Default template or a custom one you created.

The User notifications section is located on your Booking page. Go to **Booking pages** in the bar on the left → **Booking page → User Notifications**.

> **Note:**
>
> In order for a User to subscribe to notifications on a Booking page, they must be an Editor of that Booking page. Learn more about Booking page access permissions

Adding a Mobile number for the User

In order for a User to receive SMS notifications about booking events, a mobile phone number must be added to the User’s Profile.

Learn more about sending SMS notifications to Users

User notification scenarios

Last Modified on Oct 11, 2022

This table defines the User notification scenarios used in the User notification section of a Booking page. These scenarios are the booking events that can take place during a booking lifecycle. You can choose which scenarios will trigger notifications and if the notifications are sent via email, SMS, or both.

The User notifications section can be found by going to **Booking pages** in the bar on the left → **Booking page** → **User notifications**.

Notification Scenario	Description
Automatic Booking	
Booking made by Customer	Sent to subscribed Users when the Customer makes a booking.
Booking with approval	
Booking request made by Customer	Sent to subscribed Users when the Customer submits a booking request.
Booking request approved by User	Sent to subscribed Users when a User approves the Customer’s booking request.
Calendar event	
Calendar event	The calendar event can include any booking details and can be added to the Owner’s and Customer’s calendars.
Reminders and follow-ups	
First User reminder	Sent to subscribed Users at a predefined time prior to the meeting.
Second User reminder	Sent to subscribed Users at a predefined time prior to the meeting.
Third User reminder	Sent to subscribed Users at a predefined time prior to the meeting.
Follow-up message	Sent to subscribed Users when a follow-up message is sent to the Customer.
Booking cancellation	
Booking canceled by Customer	Sent to subscribed Users when the Customer cancels a booking.
Booking canceled by User	Sent to subscribed Users when a User cancels a booking.

Booking reschedule	
Booking rescheduled by Customer	Sent to subscribed Users when the Customer reschedules a booking.
Reschedule requested by User	Sent to subscribed Users when a User sends a reschedule request to the Customer.
Booking reassignment	
Booking reassigned (original Owner)	Sent to subscribed Users of the previous Booking page when a booking is reassigned from the page.
Booking reassigned (new Owner)	Sent to subscribed Users of the new Booking page when a booking is reassigned to the page.
Booking request cancellation	
Booking request canceled by Customer	Sent to subscribed Users when the Customer cancels a booking request.
Booking request canceled by User	Sent to subscribed Users when a User cancels a booking request.
Booking request resubmission	
Booking request resubmitted by Customer	Sent to subscribed Users when the Customer resubmits a booking request.
Booking request resubmission requested by User	Sent to subscribed Users when a User asks the Customer to resubmit a booking request.
Other notifications	
Manual refund issued by User	Sent to the User when a manual refund is issued via OnceHub.

Access permissions for subscribing to Booking notifications

Last Modified on Jun 2, 2023

Any User can subscribe to User notifications for specific Booking pages in their organization's OnceHub app. User notifications can be sent via email or SMS.

In order to receive User notifications for a Booking page, the User must have an Editor access role on that Booking page. This can be assigned by a OnceHub Administrator. You can customize further notification settings for that User in the relevant Booking page's User notifications section.

If the User has not been created in the system, they can be added by clicking on your profile image or initials in the top right corner, selecting **Users** from the drop-down menu and clicking the **Add User** button (Figure 1). Learn more about adding Users

You do not need an assigned product license to be an Editor on a Booking page and subscribe to booking notifications. Learn more

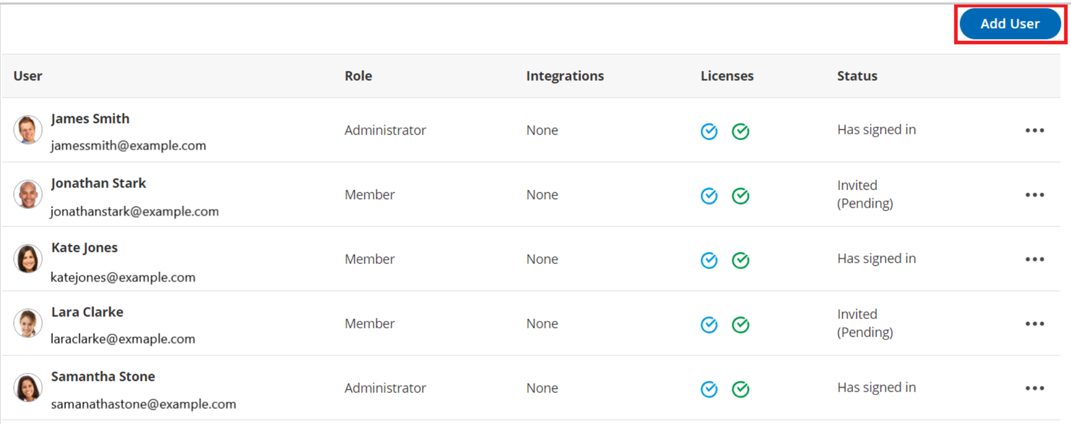


Figure 1: Users lobby

The User will receive an invitation to sign up for a OnceHub account. If the User only needs to receive notifications, they don't need to complete the sign up process—their email address is already in the system. As long as they have an Editor role on the relevant Booking page(s), they can receive notifications.

There is no limit to the number of Users who can subscribe to User notifications on a Booking page.

Note:

If you change the Owner of a Booking page, any User notifications settings you have previously customized for the Owner will be returned to the default settings for the new Booking page Owner.

Introduction to SMS notifications

Last Modified on Jun 2, 2023

Any notification related to OnceHub booking activity can be sent via SMS. You can send SMS notifications to your Customers and Team members anywhere in the world.

We recommend using SMS notifications as a backup for email notifications. Emails are sometimes delayed due to slow Internet connections or other reasons. SMS notifications are several times more reliable and have a higher delivery rate and open rate than email. They are also useful if you want to provide a quick reminder about a booking to Customers or Team Members.

We use a reliable network that will always deliver and confirm receipt of your messages quickly, no matter what length the message is or where the receiver is located.

Learn more about setting up SMS notifications for your Customers

Learn more about setting up SMS notifications for your Users

Worldwide reach

Because your Customers can be anywhere, we use a network that can reach any mobile number globally. OnceHub uses a global telecommunications network that services 235 countries and territories.

Enterprise-grade reliability

Your SMS notifications will arrive promptly. Our network uses lines that ensure direct number-to-carrier connectivity, reducing the time it takes for your SMS to arrive. No messages are lost to network outages because we use Adaptive Routing technology that chooses the best path for your SMS notifications.

All SMS notifications are sent through our private dedicated short code, 75732. The short code lets carriers know that OnceHub is a whitelisted service, ensuring that your SMS notifications are never labeled as SPAM.

Our SMS throughput is 100 messages per second, ensuring your SMS notifications will be timely and will never get stuck in a queue. In addition, all SMS notifications sent through OnceHub get a delivery receipt directly from the receiver's carrier, which confirms with 100% certainty that your message arrived.

Complete control over SMS content

You can send your own customized SMS notifications to your Customers and Users. We fully support long SMS notifications, allowing you to send SMS notifications that are far beyond the standard 160 character limit. Learn more about creating SMS templates

Complete visibility into SMS activity

We provide complete visibility into the SMS activity in your account. In **SMS log data** section, you can see every SMS sent through your account. The SMS log data will instantly tell you who sent the SMS, who received it, how many credits were used and other important information. Learn more about the SMS log data

SMS Opt-out list

OnceHub maintains an SMS Opt-out list that complies with all relevant regulations. Learn more about the SMS Opt-out list

SMS pricing

Every standard SMS message sent requires one SMS credit. Each OnceHub account comes with 25 free SMS credits. Learn more about SMS pricing

Sending SMS notifications to Customers

Last Modified on Oct 12, 2022

You can send SMS notifications to your Customers to keep them up-to-date about bookings they've made with you. Sending SMS notifications in addition to email notifications provides an extra notification channel. This makes it more likely that your Customers will attend their meetings with you.

In this article, you'll learn about sending SMS notifications to Customers.

Activating Customer SMS notifications

To activate Customer SMS notifications, complete the following steps.

1. Make sure the Mobile phone field is in your Booking form to collect the Customer's mobile number.
2. Select the Booking form in the Booking page settings.
3. Select SMS notifications in the Customer notifications section.
4. Make sure you have SMS credits available.

Collecting the Customer's mobile number in the Booking form

In order to send a Customer an SMS notification, you'll need to get their mobile number. When your Customers make a booking with you, they fill out a Booking form with their information.

By default, Customers will be asked to provide their mobile phone number on the Booking form. This means it will appear in the Booking form, but the Customer can choose whether or not to leave a mobile number. To ensure that you collect the Customer's mobile number, you can make it mandatory for your Customers to provide their mobile phone number. You can enable this setting in the Booking forms editor.

1. To customize your Booking form, **Booking pages** in the bar on the left.
2. Select **Booking forms editor** on the left.
3. Make sure that the **Mobile phone** field is included in the form. If the **Mobile phone** field is not included, add it by selecting it from the **System fields** pane on the right.
4. Check the **Enable SMS** checkbox to enable SMS notifications.

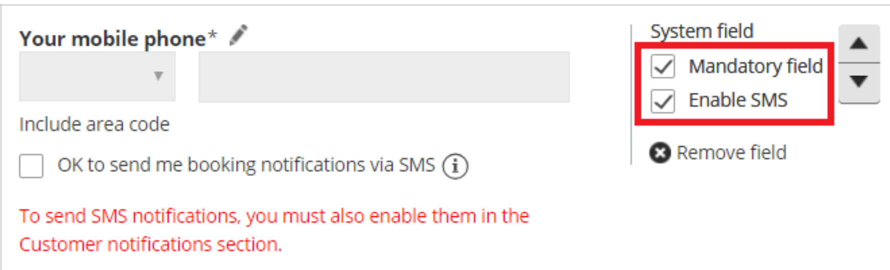


Figure 1: Enable SMS in the Booking forms editor

5. Check the **Mandatory field** checkbox to make the **Mobile phone** field mandatory. This means that the Customer must enter text in this field in order to make the booking.
6. Click the **Save** button. Note the name of the Booking form as you will need it for the next step.

When SMS notifications are enabled, an opt-in/opt-out checkbox will be included in the Booking form. This allows Customers to decide whether or not they would like to receive booking notifications via SMS.

Note:

If the Booking form is skipped, the checkbox will be displayed when the Customer chooses a time for the booking. Booking form skipping can be used with Personalized links, web form integration and login integration.

Selecting the Booking form in the Booking page settings

Once you've added the **Mobile phone** field to the Booking form you want to use, you'll need to make sure that this Booking form is the one selected in your Booking page. This can be done in the **Booking form and redirect** section of your Booking page.

By default, the location of the Booking form section depends on whether or not your Booking page is associated with any Event types.

- Booking pages **with Event types**: Each Event type has its own Booking form, set in the **Event types's** Booking form section.
- Booking pages **without Event types**: The Booking form is selected in the **Booking page's** Booking form section.

Note:

If your Booking page is associated with any Event types, you can customize the location of the Booking form section.

In the **Booking form and redirect** section, select the correct Booking form from the **Booking form** drop-down menu (Figure 2).

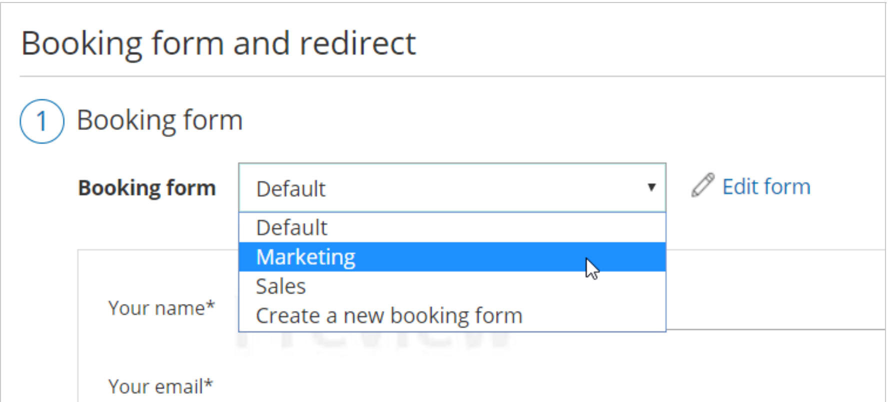


Figure 3: Select a Booking form

You can see a preview of the Booking form below the drop-down menu. The preview includes all the fields in the Booking form in the exact order in which they will appear to your Customers. If you want to edit the Booking form, click **Edit form**.

Selecting SMS notifications in the Customer notifications section

You can select which Customer notification scenarios you wish to send SMSes for in the Customer notifications section. By default, the location of the Customer notification section depends on whether or not your Booking page is associated with any Event types.

- Booking page **with Event types**: The Customer notifications section is located on the **Event type**.
- Booking Page **without Event types:** The Customer notifications section is located on the **Booking page**.

Note:

If your Booking page is associated with any Event types, you can customize the location of the Customer notifications section.

In the Customer notifications section, select the Notification scenarios you wish to send SMSes for by checking the SMS checkbox next to the relevant scenario (Figure 3). Click the **Save** button at the bottom when you're finished.

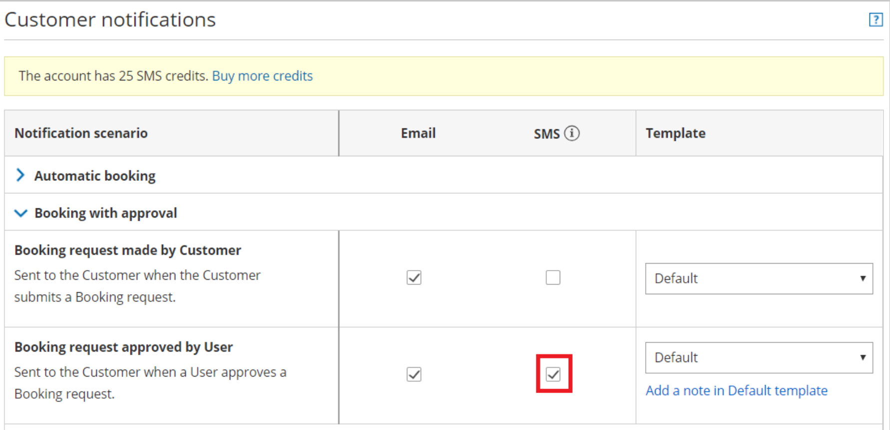


Figure 3: Customer notification scenarios

Making sure you have SMS credits available

You need to have SMS credits available to send SMS notifications. To view the SMS credits available in your account, click go to your **OnceHub Account -> Billing -> Products**.

Sending SMS notifications to Users

Last Modified on Oct 12, 2022

SMS notifications are a quick and reliable way to keep on top of booking activity for yourself and other Users. Any OnceHub User can receive SMS notifications related to Booking activity in their organization's account. You do not need an assigned product license to be an Editor on a Booking page and subscribe to booking notifications. Learn more

In this article, you'll learn about sending SMS notifications to Users.

To receive SMS notifications on Booking activity for a specific Booking page, complete the following steps:

1. Enable User notifications and add your mobile number to your profile.
2. Make sure you are the Owner or Editor of the Booking page.
3. Subscribe to User SMS notifications in the **User notifications** section of the Booking page.
4. Make sure you have SMS credits available.

Adding your mobile number to your Profile

To receive SMS notifications, you must first add your mobile number to your Profile.

1. Sign in to your OnceHub Account.
2. Go to **My profile** (your profile image or initials in the top right corner) → **Profile settings → SMS notifications** (Figure 1).

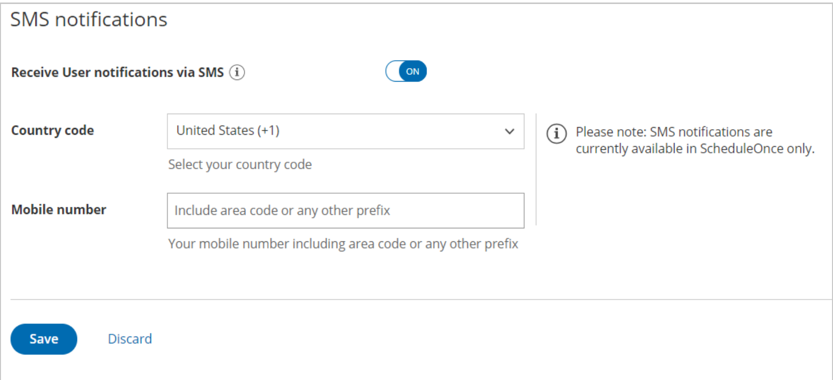


Figure 1: SMS Notifications

3. Toggle the **Receive User notifications via SMS** field to **ON**.
4. Select your **Country code** and enter your **Mobile number**, including the area code.
5. Click **Save.**

Making sure you are the Booking page Owner or Editor

Booking notifications are unique for every Booking page. To receive Booking notifications for a Booking page, you must be either the Owner or an Editor of the Booking page. Booking page Owners automatically receive email notifications. Booking page Editors can receive notifications and make changes to the page.

To see if you are an Owner or Editor of a Booking page, go to **Booking pages** in the bar on the left → check the relevant Booking page in the **Booking pages** section (Figure 2). You should see **Owned by you** or **You are an Editor** on the relevant Booking page.

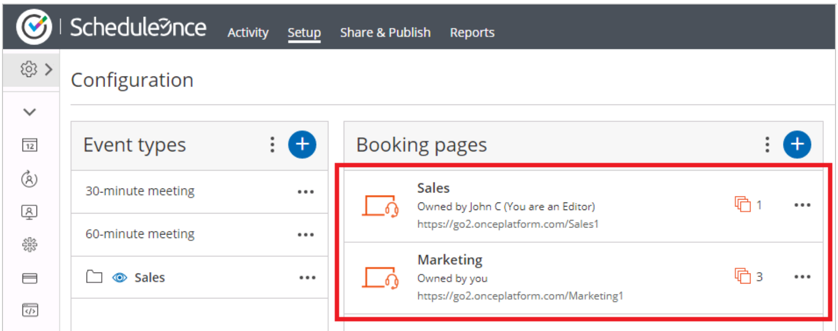


Figure 2: An Admin's setup page

If you are not a Booking page Owner or Editor, a OnceHub Administrator must grant you Editor permissions to that page. This can be done in two ways:

1. Go to **Booking pages** in the bar on the left → **Booking pages → action menu (three dots) → Booking page access**. In this section, you can determine which Booking pages the specific User can access.
2. Go to **Booking pages** in the bar on the left → select the relevant Booking page **→ Overview section.** Here you can edit the Booking page's Owner and Editor. This method is only possible if the Administrator is able to edit that specific Booking page.

Learn more about Booking page access permissions

Subscribing to User SMS notifications

If you are the Owner or an Editor of a Booking page, you can subscribe to SMS notifications for booking activity related to that page in the User notifications section.

1. Go to **Booking pages** in the bar on the left → select the relevant Booking page → **User notifications** on the left.
2. In the column labeled with your name, select the Notification scenarios you'd like to receive SMS notifications for by checking the relevant checkboxes (Figure 3).

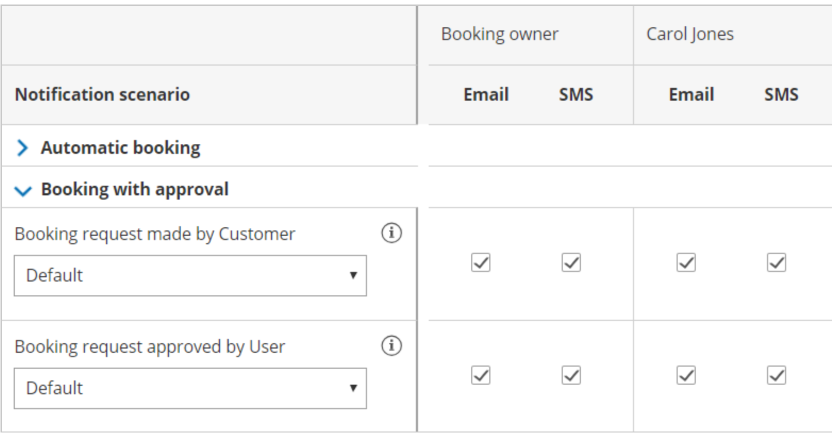


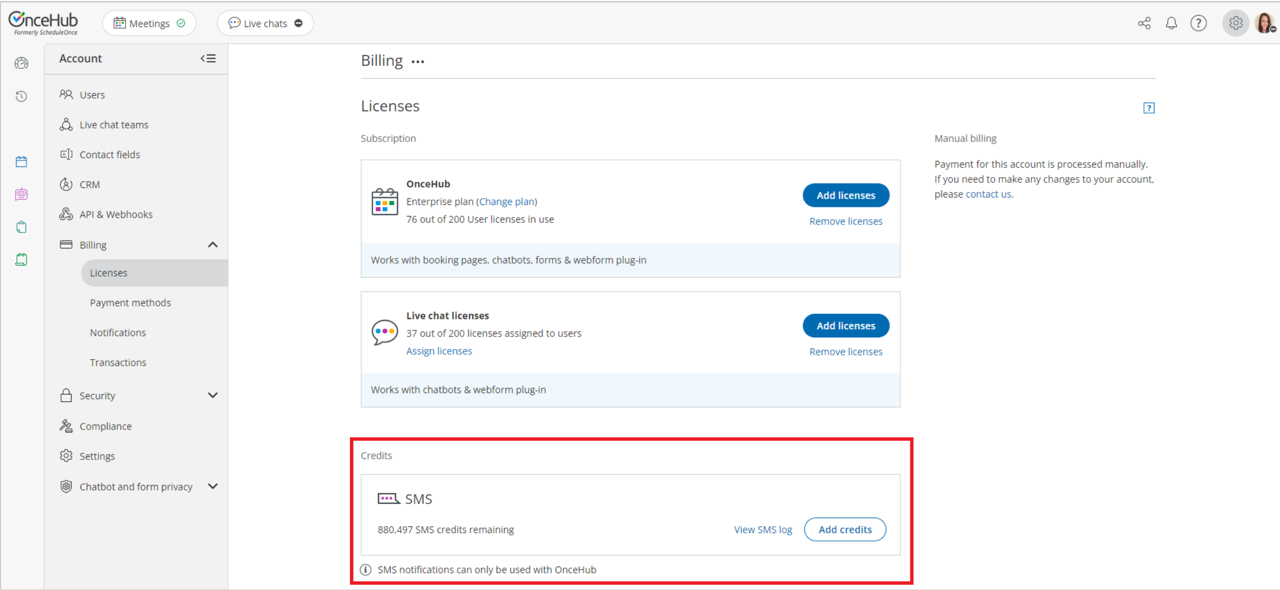
Figure 3: Selecting User notifications

3. Click the **Save** button at the bottom when you're finished.

If your name does not appear in the Notification scenarios list, you'll need to be added as a Booking page editor (see above).

Ensuring you have SMS credits available

You need to have SMS credits available to send SMS notifications. To view the SMS credits available in your account, click go to **Settings** (gear icon) in the top right corner **→ Billing** on the left **→ Licenses**.


OnceHub
Meetings
Live chats
Account
Users
Live chat teams
Contact fields
CRM
API & Webhooks
Billing
Licenses
Payment methods
Notifications
Transactions
Security
Compliance
Settings
Chatbot and form privacy
Billing
Licenses
Subscription
OnceHub
Enterprise plan (Change plan)
76 out of 200 User licenses in use
Add licenses
Remove licenses
Works with booking pages, chatbots, forms & webform plug-in
Live chat licenses
37 out of 200 licenses assigned to users
Assign licenses
Add licenses
Remove licenses
Works with chatbots & webform plug-in
Manual billing
Payment for this account is processed manually. If you need to make any changes to your account, please contact us.
Credits
SMS
880,497 SMS credits remaining
View SMS log
Add credits
SMS notifications can only be used with OnceHub

Understanding SMS delivery statuses

Last Modified on Jun 2, 2023

OnceHub uses a reliable network that will always confirm the delivery of your messages. All SMS messages are sent through our private short code, 75732. The short code provides us with a delivery receipt that confirms the status of your SMS message directly from the receiver's carrier. Learn more about our SMS service

All SMS notifications sent through your account are recorded in the SMS log data. The possible statuses include Delivered, Sent, Rejected and Failed.

- **Delivered:** The SMS was sent and arrival was confirmed via delivery receipt.
- **Sent:** SMS was sent but a delivery receipt has not been received yet.
- **Rejected:** The phone number was found to be invalid prior to sending.
- **Failed:** The SMS failed to be delivered.

Note about the "Sent" status:

It is common for an SMS to show as "Sent" when it is in the process of being delivered. Once the SMS is delivered and a delivery receipt is received, the status will change to "Delivered."

When an SMS has a "failed" status, a reason will be given whenever possible. Below are the most common reasons for SMS delivery failures and steps that can be taken to resolve the issue.

Error Message	Meaning	Resolution
Illegal Number	Invalid number	Confirm the receiver's number
Absent Subscriber	Number has been disconnected / number not in use	Contact the receiver's carrier / confirm receiver's number
Call barred by user	Subscriber requested not to receive SMS	The receiver should contact their carrier and ask for SMS to be enabled
Portability Error	The number was recently ported from one carrier to another and the database has not been updated yet	Contact us for more information
Anti-Spam Rejection	Carrier rejected the message because of the message content / sender ID	Contact us for more information
Handset Busy	Handset is busy and not able to receive SMS	Try again later
Network Error	Network is busy or there are Network problems	Try again later
Invalid Message	Message not supported / rejected by the carrier	Contact us for more information

Unroutable	The carrier is not able to route the SMS to the number	Contact us for more information
Destination Unreachable	N/A	Confirm receiver’s number / Try again later
Subscriber Age Restriction	N/A	N/A
Number Blocked by Carrier	N/A	The receiver should contact their carrier and ask for SMS to be enabled
Prepaid - Insufficient funds	Receiver does not have sufficient funds / cannot receive SMS notifications on their plan	Try again later
General Error	N/A	Contact us for more information

Opting in and out of SMS Notifications

Last Modified on May 11, 2023

Mobile phone numbers provided by your Customers and Team members are held in strict confidence and will only be used for sending scheduling notifications, based on settings that you define. However, sometimes Customers or Users will want to stop receiving SMS notifications.

OnceHub maintains an SMS opt-out list. This is a list of mobile numbers that have opted out of receiving SMS notifications from the OnceHub system. The opt-out list is maintained to ensure OnceHub Users comply with applicable laws and regulations.

You do not need an assigned product license to subscribe to booking notifications. Learn more

User action: Opt in

To opt in, go to **My profile** (your profile image or initials in the top right corner) → **Profile settings → SMS Notifications** section. Enter your mobile phone number and toggle the **Receive User notifications via SMS** option to **ON**. Learn more about sending SMS notifications to Users

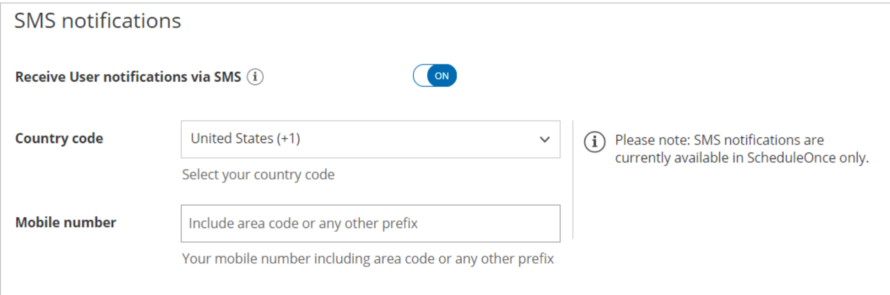


Figure 1: SMS notifications section

User action: Opt out

To opt out from receiving scheduling notifications via SMS, go to **My profile** (your profile image or initials in the top right corner) → **Profile settings → SMS Notifications** section. Toggle the **Receive User notifications via SMS** option to **OFF**.

If you have a US phone number, you can also opt out by replying to any SMS you receive with STOP, END, QUIT, CANCEL or UNSUBSCRIBE.

Customer action: Opt in

To opt in, Customers must provide their mobile phone number on the Booking form and check the box that enables sending of SMS booking notifications (Figure 2). Learn more about sending SMS notifications to Customers

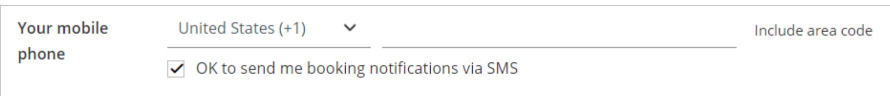


Figure 2: Booking form

Customer action: Opt out

To opt out from receiving scheduling notifications via SMS, Customers with a US phone number can reply to any SMS they receive with STOP, END, QUIT, CANCEL, UNSUBSCRIBE. Customers with a non-US phone number should contact us to opt out.

If a Customer opts out and changes their mind, they may reply to any SMS they receive with UNSTOP. This will allow them to receive any future planned notifications.

Introduction to categories

Last Modified on Jun 2, 2023

OnceHub gives you the ability to create categories to organize Event types and Booking pages for you and your Customers. Using categories, you can group your Booking pages and Event types according to your specific scheduling scenarios.

You can choose to use categories exclusively within the Admin interface, in which case they'll be invisible to Customers. Alternatively, you can make categories visible to Customers, in which case they'll appear on your Booking pages and Master pages.

The User experience

You can use categories to help you organize the Booking pages and Events types listed on the **OnceHub setup** page into intuitive and functional groups. By using categories on the backend, you can better manage department or cross-department roles and ownership in your organization. Using categories in conjunction with effective User management allows you to streamline administrative tasks, resulting in greater business efficiency.

Learn how to create categories for Booking pages and Event types

The Customer experience

Categories that are visible to Customers may appear on your Booking pages and Master pages. Whether they appear, and how they appear, depends on the specific scenario.

- If your Booking page or Master page includes more than one category, there will be a category selection step in the booking process. Customers will see the list of categories and will be required to pick the relevant one. This enables Customers to easily narrow down their selection criteria, creating a more coherent scheduling experience. Learn more about the Customer experience when your Booking page includes categories

  Note:

  If your Master pages include multiple categories, you can customize the category labels and instructions to fit your specific scenario. By default, "Category" is used as the label and "Select a category" as the selection instructions. This text can easily be changed in the Master page Labels and instructions section.

- If your Booking page or Master page only includes one category, the category selection step will be skipped.
- If your Booking page or Master page includes both categorized and uncategorized items, uncategorized items will only be displayed after a category. Customers will see the uncategorized items in the following step, regardless of which category was selected. Learn more about the Customer experience when Your Master page includes categories
- If your Master page scenario is Rule-based assignment, categories will not be visible to the Customer.

Creating categories for Booking pages or Event types

Last Modified on Oct 12, 2022

You can create categories to organize Event types and Booking pages for you and your Customers. Using categories, you can group your Booking pages and Event types according to your specific scheduling scenarios.

You can choose to use categories exclusively within the Admin interface, in which case they'll be invisible to Customers. Alternatively, you can make categories visible to Customers, in which case they'll appear on your Booking pages and Master pages.

- When you use categories to organize the Admin interface, you can organize your Event types and Booking pages in a structure that makes it easier to manage department or cross-department roles and ownership in your organization.
- When visible to Customers, categories enable you to model specific scheduling scenarios. You can use categories to organize information so that the Customer experiences a simple decision process.

Creating a new category

1. Go to **Booking pages** in the bar on the left.
2. Click on the Action menu (three dots) at the top of the Event types or Booking pages column. Select **New Category** (Figure 1). Alternatively, navigate to the Overview section of an Event type or a Booking page and click **New** next to the **Category** field.

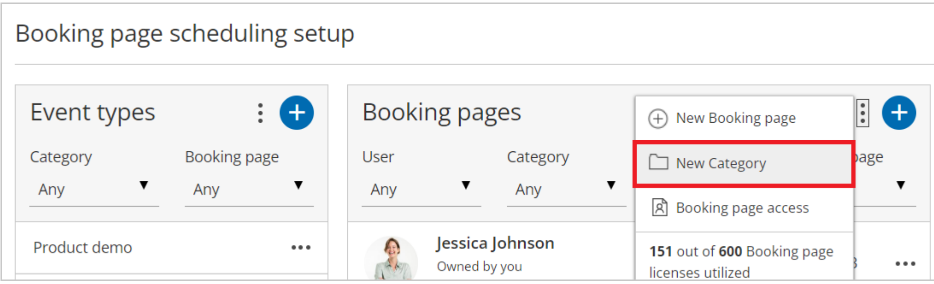


Figure 1: Booking page scheduling setup

3. In the **New Category** pop-up that appears, select the **Visibility** that you want the category to have. You can choose to make the category visible internally and to your Customers, or visible internally only (Figure 2).

   - When you create categories that will be visible on the Customer side, consider which scheduling process you want to implement and how it will impact the Customer experience. Learn more about Categorized items in Master pages and Categorized Event types in Booking pages

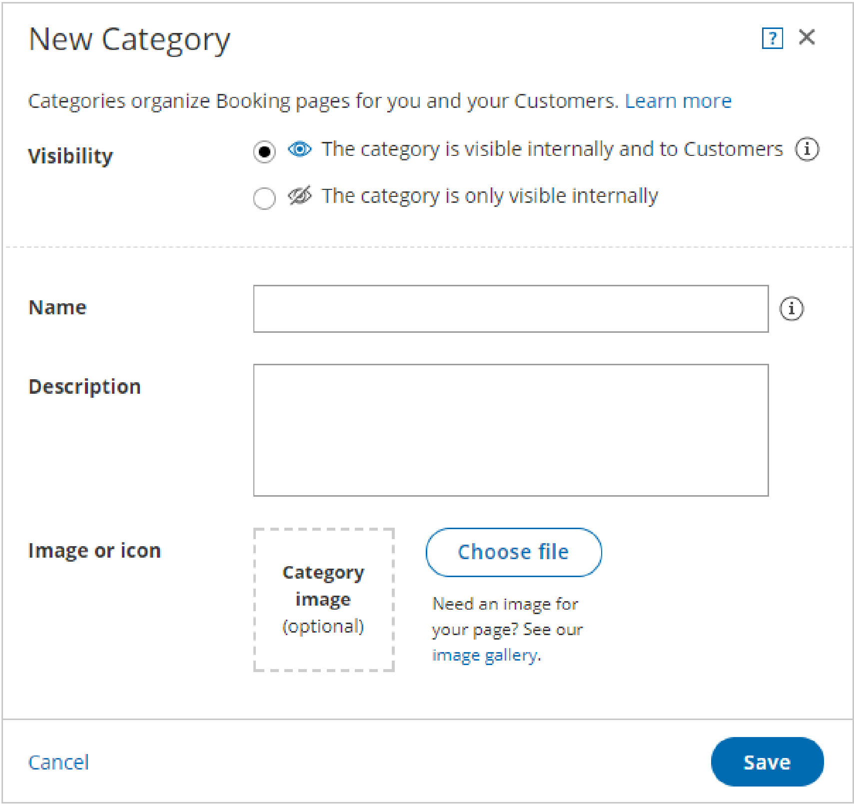


Figure 2: New Category pop-up

4. Enter a **Name** and a **Description** (optional)**.** If you choose to make the category visible to Customers, this is what your Customers will see during the category selection step in the booking process.
   - The **Name** is limited to 45 characters.
   - The **Description** is limited to 2,000 characters.
5. Add an **Image** (optional). This image will be displayed for Customers to see during the category selection step in the booking process.
   - The recommended size is 70x70 pixels and supported formats are JPG, JPEG, PNG, or GIF.
   - The maximum size is 200KB.
6. Click **Save**. The new category is now added to the list.
7. To add Booking pages or Event types to your category, drag and drop Booking pages or Event types into the category (Figure 3). Alternatively, you define the category for each Booking page or Event type in their Overview section.

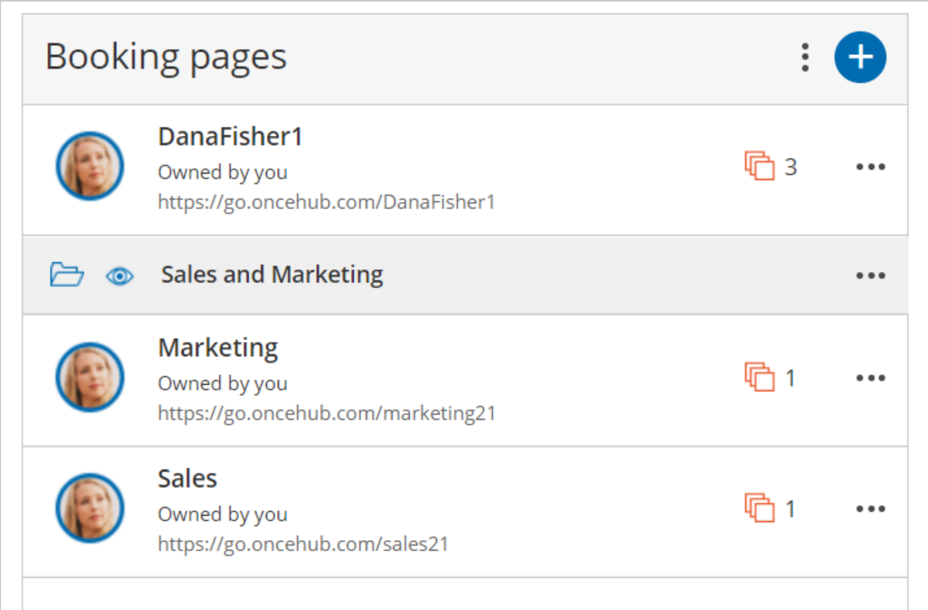


Figure 3: Drag and drop Booking pages into a category

Note:

When a Master page includes Event type categories or Booking page categories that are visible to Customers, you can define labels and selection instructions in the Labels and instructions section of the Master page.

The Customer experience of categorized items in Master pages

Last Modified on Jul 1, 2019

You can use categories to organize Event types and Booking pages into intuitive and functional groups. If Event type categories or Booking page categories are visible to Customers, they will show up on your Master page as a separate step. Categories in Master pages help Customers to better understand the options available to them, ensuring that they make the correct selection.

Scheduling flow of Master pages with categorized Booking pages

Click this link for an interactive demo

1. **Category selection:** Customers are presented with a list of Booking page categories to choose from.
    - By default, the selection instruction is "Select a category." You can edit the instruction based on what your categories represent.
    - In the example shown below, categories are used to model different product types offered by the Financial services company. The selection instructions are "Select your product interest."

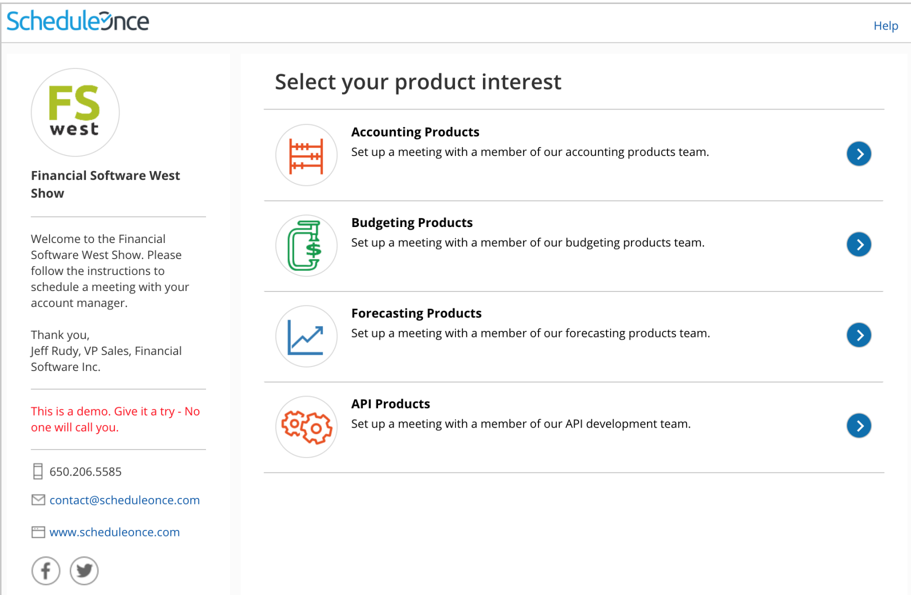


Figure 1: Category selection step

2. **Booking page selection:** Once the Customer has selected a category, they'll be presented with a list of all Booking pages in the selected category. In this example, the Customer sees Booking pages for Team members that specialize in the chosen product category.

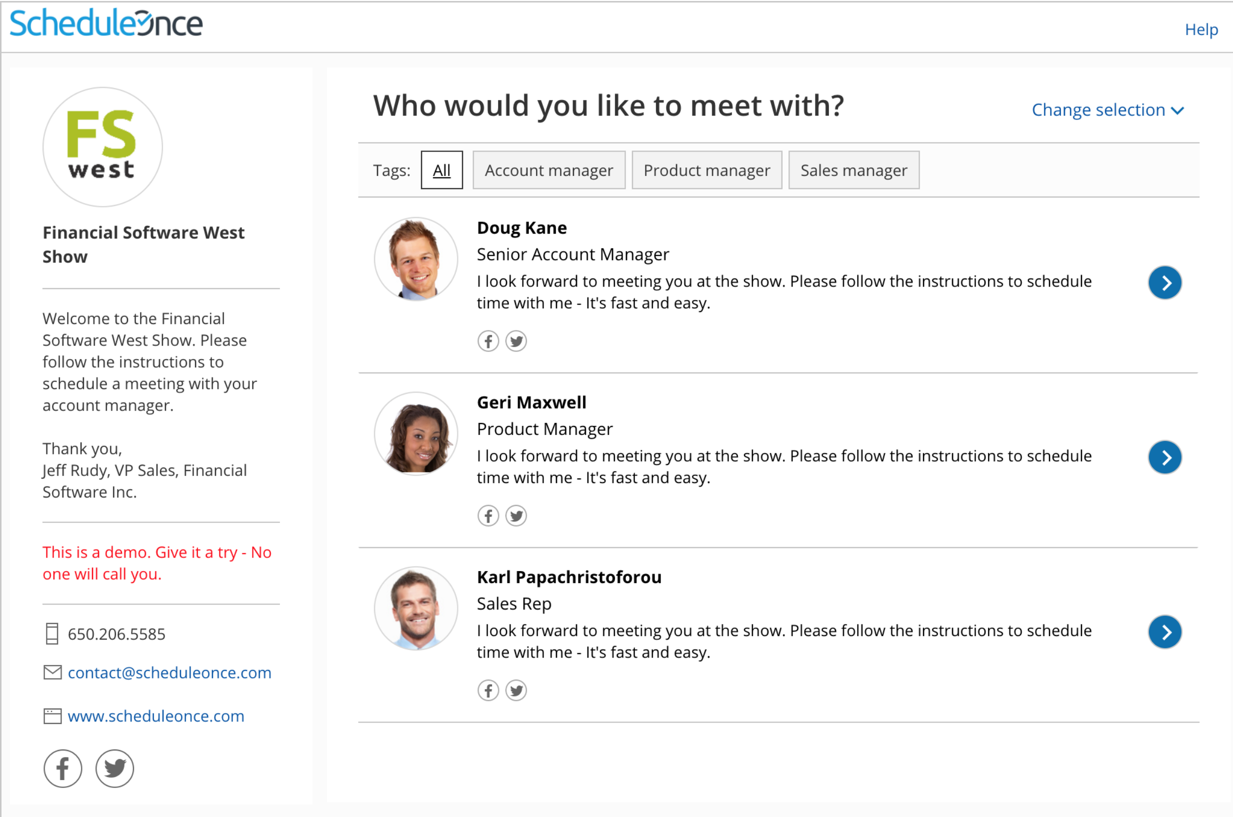


Figure 2: Booking page selection step

> **Note:**
>
> Booking pages that are not within a category will also be displayed in this step, regardless of which category the Customer selected.

3. **Event type selection:** Next, the Customer will choose an Event type.
4. Finally, the Customer will pick a date and time for the meeting and fill out and submit the Booking form.

The category name will always appear in User notifications. The category name will only appear in Customer notifications if the Customer went through a category selection step during their booking process.

Scheduling flow of Master pages with categorized Event types

Click this link for an interactive demo

1. **Category selection:** Customers are presented with a list of Event type categories.
   - By default, the selection instruction is "Select a category." You can edit the instructions based on what your categories represent.
   - In the example shown below, categories are used for different languages that are taught at the school. The selection instructions are "Select a language."

Figure 3: Category selection step

2. **Event type selection:** Once the Customer has selected a category, they'll be presented with a list of all the Event types in the selected category. In this example, the Customer sees all courses offered in the selected language.

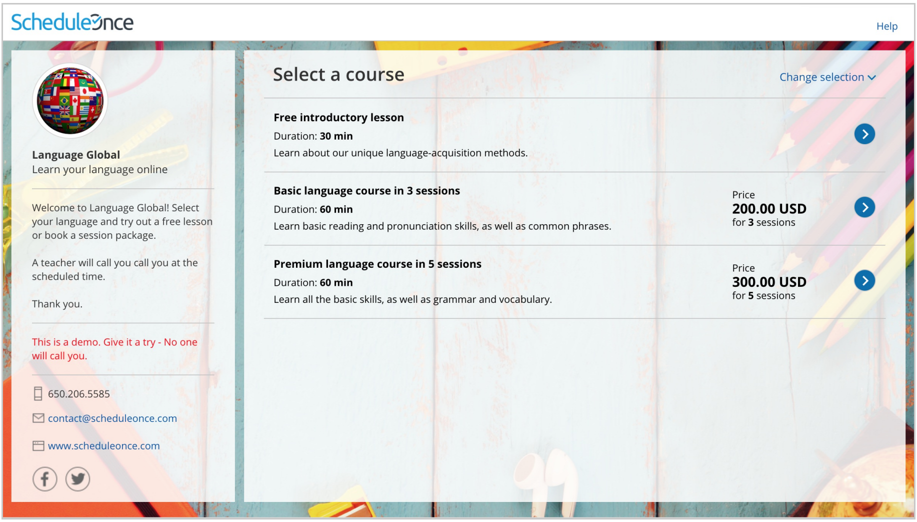


Figure 4: Event type selection step

> **Note:**
>
> Event types that are not within a category will also be displayed in this step, regardless of which category the Customer selected.

3. Once the Customer has selected an Event type, they'll continue the scheduling process. In this example, the Customer picks a tutor, selects a time, and fills out the Booking form.

The Category will always appear in User notifications. The category will only appear in Customer notifications if the Customer went through a Category selection step during their booking process.

Scheduling flow of Master pages with categorized Booking pages and Event types

Master pages with categorized Event types and Booking pages will have two separate category selection steps: one for Booking page categories and one for Event type categories. The order in which the category selection steps is displayed depends on the Master page scenario.

Let's take a look at an example where the chosen scenario is **Event types first**.

1. **Event type category selection:** First, the Customer is presented with a list of Event type categories. After they select an Event type category, they'll be presented with a list of all the Event types in that category.
2. **Event type selection**: The Customer selects an Event type in that category.

> **Note:**
>
> Event types that are not within a category will also be displayed in this step, regardless of which category the Customer selected.

3. **Booking page category selection:** After selecting an Event type, the Customer is presented with a list of Booking page categories. After they select a Booking page category, they'll be presented with a list of all the Booking pages in that category.
4. **Booking page selection:** The Customer selects a Booking page in that category.

> **Note:**
>
> Booking pages that are not within a category will also be displayed in this step, regardless of which category the Customer selected.

5. Finally, they'll select a date and time, and fill out a Booking form.

The Customer experience of categorized Event types in Booking pages

Last Modified on Jul 1, 2019

You can use categories to organize your Event types into groups based on meeting type, group, location, etc. If Event type categories are visible to Customers, they will show up on your Booking pages as a separate step. This helps Customers better understand the available options and ensures that they select the correct Event type.

Scheduling flow of Booking pages with categorized Event types

Click this link for an interactive demo

1. **Category selection:** First, Customers are presented with a list of categories. In the example shown below (Figure 1), categories are used to model the query type.

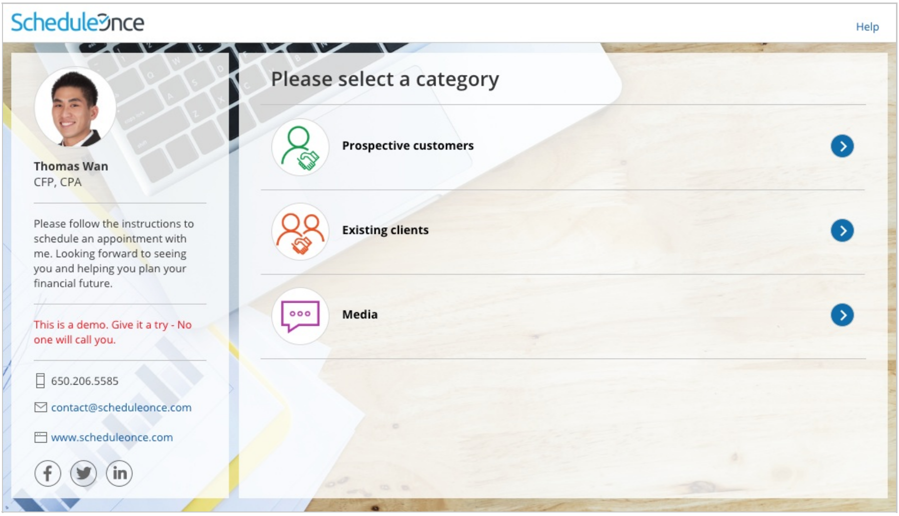


Figure 1: Category selection step

> **Tip:**
>
> In Booking pages, the selection instructions on the category step are "Please select a category". Category labels and selection instructions cannot be changed in Booking pages.
>
> If you want to customize the selection instructions, you must create the scheduling scenario using categories in a Master page.

2. Once the Customer has selected a category, they'll be presented with a list of Event types in that category. If you only have one Event type in a category, the Event type selection step will be skipped.

> **Tip:**
>
> In Booking pages, the Selection instructions on the Event type step are "Please select an event type". Category labels and selection instructions cannot be changed in Booking pages.
>
> If you want to customize the Selection instructions you must create the scheduling scenario using categories in a Master page.

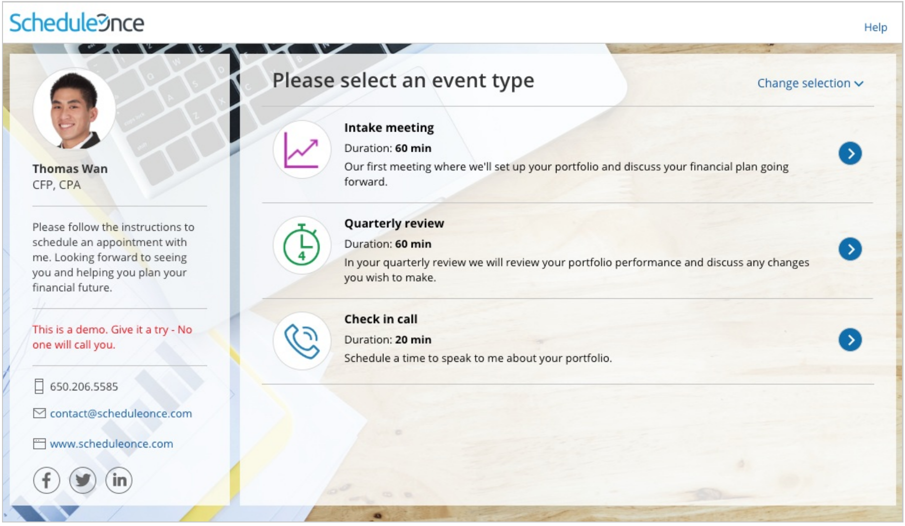


Figure 2: Event type selection

> **Note:**
>
> Event types that are not in a category will also be displayed in this step, regardless of which category the Customer selected.

3. **Event type selection:** The Customer selects an Event type from the list. Once the Event type has been selected, Customers will pick a date and time for the meeting and fill out and submit the Booking form.

The Category will always appear in User notifications. The category will only appear in Customer notifications if the Customer went through a Category selection step during their booking process.

Introduction to Master pages

Last Modified on Oct 15, 2024

Master pages allow you to combine multiple Booking pages and Event types into one point of access for your Customers, providing support for a wide range of scheduling scenarios. You can set up your Master page so that Customers can select the Team member they want to book with, or set it up so that bookings are automatically assigned to Team members according to rules you create.

You can use Master pages for:

- Scheduling scenarios for organizations with multiple Team members and meeting types.
- Scheduling scenarios for individuals with multiple appointments types, locations, or channels.
- One-time links that are good for one booking only.
- Multiple Master page scenarios such as Event types first or Booking pages first.

Master page sections

Overview

The Overview section shows the main properties of the Master page. In the Overview section, you can find:

- The main settings for your Master page.
- Information about sharing and publishing your Master page.
- Which Booking pages and Event types are included on your Master page.

Assignment

This is where you define the way that bookings will be assigned to Booking pages in your Master page. This section is different depending on which scenario you selected for your Master page.

Scenario	How bookings are assigned
Team or panel pages	If your Master page scenario is Team or panel page, the Event types and assignment section is where you create rules for how bookings will be assigned to Booking pages. Booking assignment is defined per Event type that you offer on your Master page. This allows for flexible setup that can be different for each Master page. You can also generate one-time links which are good for one booking only, eliminating any chance of unwanted repeat bookings.
Booking pages first or Event types first	If your Master page scenario is Booking pages first or Event types first, the Event types and assignment section is where you use the drop-down menu to select which Booking pages are included in your Master page. The drop-down only lists Booking pages that **are associated** with Event types. Learn more about adding Event types to Booking pages
Booking pages only	If your Master page scenario is Booking pages only, the Event types and assignment section is where you use the drop-down menu to select which Booking pages will be included in your Master page. The drop-down will only list Booking pages that **are not associated** with Event types.

Labels and instructions

This is where you define the public labels for the different entities in your Master page. You can also customize instructions that will help your Customers make the right selections during the scheduling process. Learn more about Labels and Instructions

Public content

Here you can name your Master page and provide the details that your Customers see when they book with you. You can upload an image, edit the logo and design, and provide your contact details. Learn more about Public content

One-time links

When you use a Master page using team or panel pages, you can generate one-time links which you can send to your Customers to book with you. One-time links are good for one booking only, eliminating any chance of unwanted repeat bookings.

A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page. When you create a one-time link, it's automatically copied to your clipboard with one click, allowing you to quickly generate multiple one-time links that can be sent to different Customers. One-time links can be personalized, allowing the Customer to pick a time and schedule without having to fill out the Booking form.

Learn more about using one-time links

Tip:

You can use the OnceHub for Gmail extension to schedule with general links directly from your Gmail account. You can generate links, copy them in a single click, and send them in an email.

Learn more about OnceHub for Gmail

Creating a Master page

Last Modified on Oct 13, 2022

Master pages allow you to combine multiple Booking pages and Event types into one point of access for your Customers, providing support for a wide range of scheduling scenarios.

When you create a Master page, you can it set up so that Customers can select the Team member they want to book with, or set it up so that bookings are automatically assigned to Team members according to rules you create. Alternatively, you can create a Master page that combines Booking pages representing different locations or channels. You can create as many Master pages as you need to meet your organization's requirements.

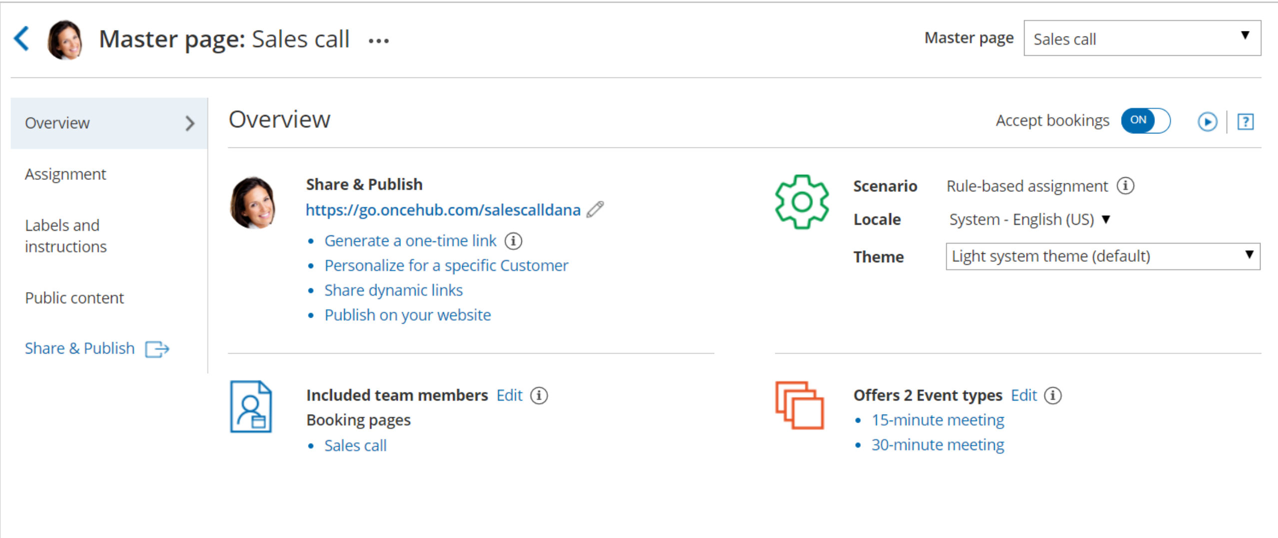


Figure 1: Master page Overview

In this article, you'll learn how to create a Master page.

Tip:

If you would like to generate one-time links which are good for one booking only, you should use a Master page using Rule-based assignment with Dynamic rules.

One-time links eliminate any chance of unwanted repeat bookings. A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page. One-time links can be personalized, allowing the Customer to pick a time and schedule without having to fill out the Booking form.

Requirements

To create a Master page, you must be a OnceHub Administrator.

Creating a Master page

1. **Booking pages** on the left.
2. Click the Plus button in the **Master pages** pane.
3. The **New Master page** pop-up will appear (Figure 2).

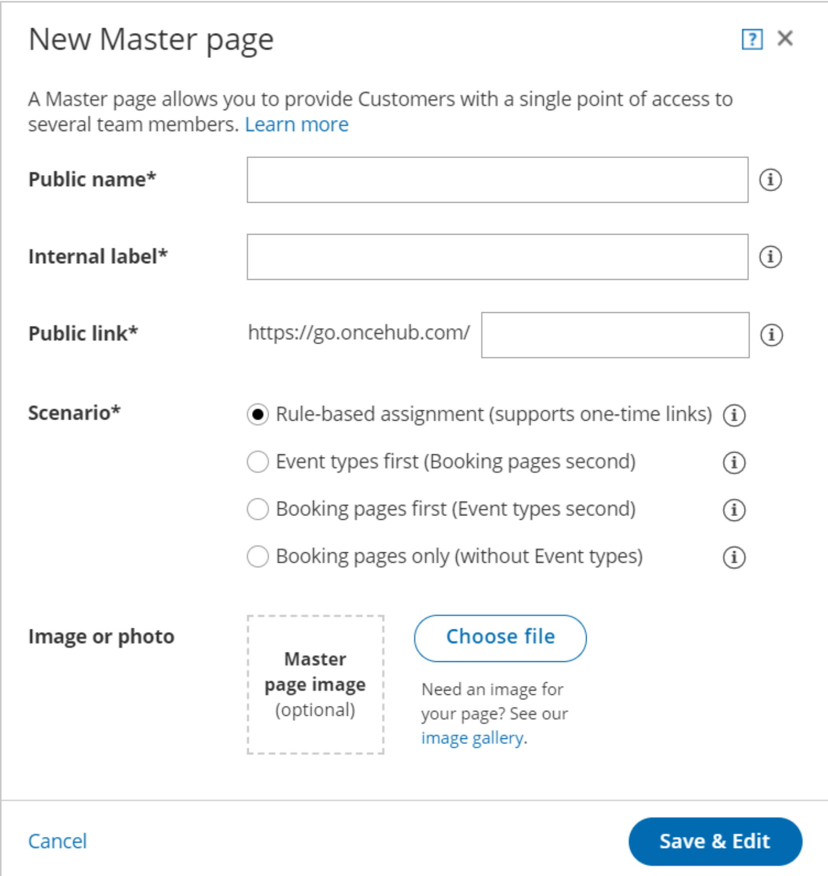


Figure 2: New Master page pop-up

4. Define the properties for your Master page.

- **Public name:** The Public name is visible to Customers as the page title. It can be changed at any time in the Public content section.
- **Internal label:** The Internal label is only visible internally, and not visible to your Customers. A recognizable label is recommended because the Master page will be identified with this label throughout your OnceHub app. It can be changed at any time in the Master Page Overview section.
- **Public link:** The Public link is the link used by Customers to access the page. It must be unique and include at least four characters. It can be changed at any time in the Overview section. Learn more about Public links

5. Select your Master page scenario. This determines your Master page's scheduling flow. Master pages can have one of four different flows.

- **Team or panel page**: Customers select a time and bookings are automatically assigned to Team members according to the rules that you define in the Master page Assignment section.
- **Event types first**: Customers first select an Event type, then they are presented with the Booking pages that provide that Event type. Once they select a Booking page, they will be presented with time slots based on that Booking page's availability.
- **Booking pages first**: Customers first select a Booking page, then they are presented with the Event types offered by that Booking page. Once they select an Event type, they are presented with the availability of the Booking page they selected.
- **Booking pages only:** Customers select a Booking page. Then, they are presented with the Booking page's availability. This option is useful if you don't use Event types and there are no shared settings between your Booking pages.

Note:

The scenario cannot be changed after you create a Master page.

6. Add an **Image or photo** to your page. This will be visible to Customers. It can be changed at any time in the Public content section.
7. Click **Save & Edit**.

You're all set! You'll be redirected to the Master page Overview section to continue editing your settings.

Master page scenarios

Last Modified on Jun 2, 2023

Master pages are a flexible tool that you can use to unite your Booking pages into a single point of access for your Customers. OnceHub offers four different Master page scenarios, providing support for a wide range of scheduling scenarios. The Master page scenario determines the way in which bookings are assigned to Booking pages in your Master page.

Master page scenario options

The four scenarios you can choose from are:

- Rule-based assignment
- Booking pages first
- Event types first
- Booking pages only

When you create a new Master page, you choose which scenario you would like to use. This setting cannot be edited after the page is created, so it is important that you choose the right scenario for your needs.

Tip:

If you would like to generate one-time links which are good for one booking only, you should use a Master page using Rule-based assignment with Dynamic rules.

One-time links eliminate any chance of unwanted repeat bookings. A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page. One-time links can be personalized, allowing the Customer to pick a time and schedule without having to fill out the Booking form. Learn more about one-time links

Master page scenario: Rule-based assignment

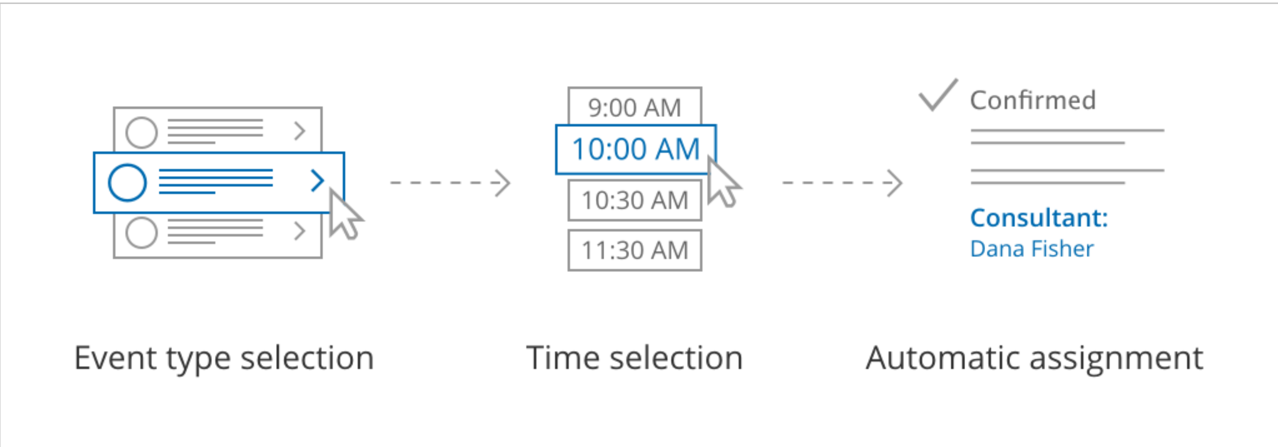


Figure 1: Rule-based assignment

With this scenario, Customers first select an Event type and a meeting time. Bookings are then automatically assigned to Team members according to the rules that you define.

- With Dynamic rules, booking assignment is defined per event type that you offer on your Master page. This allows for flexible setup that can be different per Master page. You can also generate one-time links which are good for one booking only, eliminating any chance of unwanted repeat bookings.

- With Static rules, bookings are assigned according to global settings. In this case, meeting providers are determined by the associations you create between Event types and Booking pages. This means that you can only offer Event types that are associated with the Booking pages included on your Master page.

Learn more about Rule-based assignment

Master page scenario: Event types first

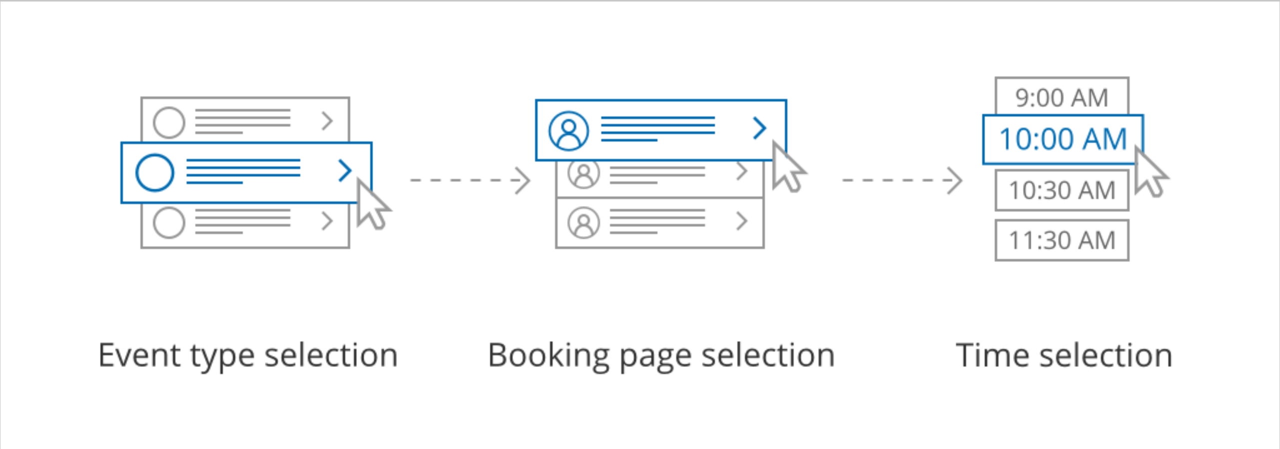


Figure 2: Event types first

With this scenario, the Customer first selects which Event type they prefer. They are then presented with the Booking pages that provide that Event type. Once the Customer selects a Booking page, they are presented with the Booking page's availability and can select a time.

Learn more about Event types first

Master page scenario: Booking pages first

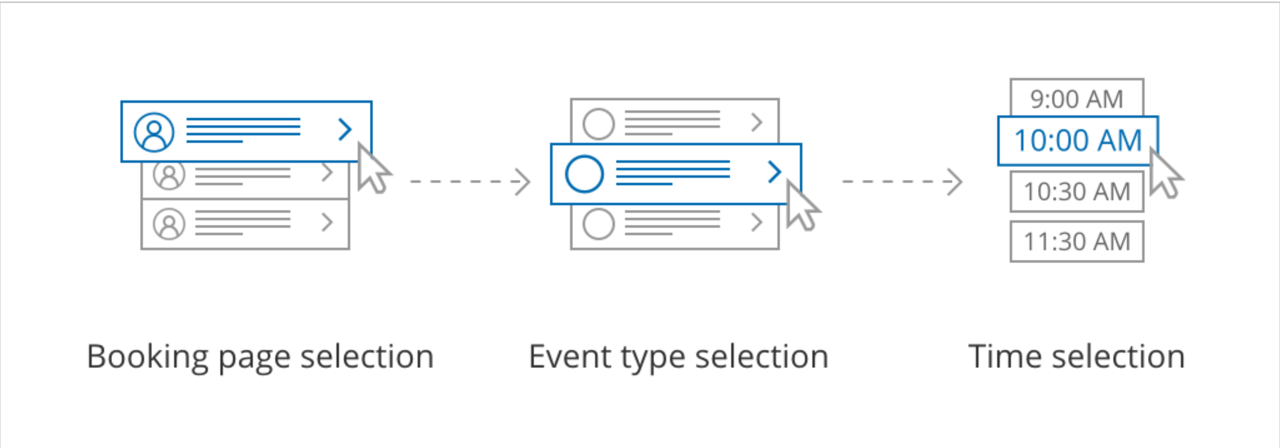


Figure 3: Booking pages first

With this scenario, the Customer first selects the Booking page they prefer. They are presented with the Event types offered by that Booking page. Once they select an Event type, they are presented with the availability of the Booking page they selected and can choose a time.

Learn more about Booking pages first

Master page scenario: Booking pages only

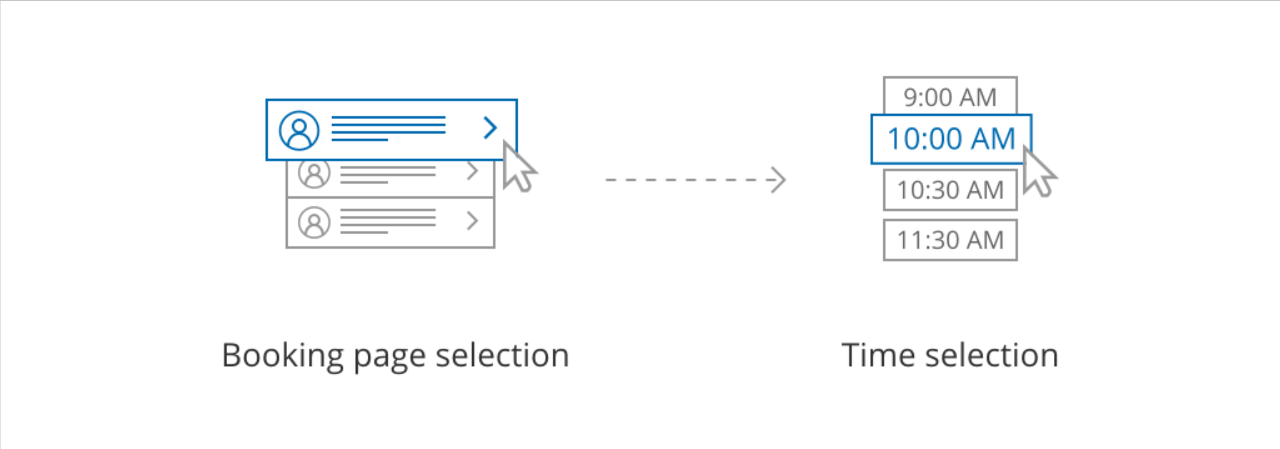


Figure 4: Booking pages only

With this scenario, Customers select a Booking page and are presented with the Booking page's availability. This option is useful if you do not use Event types and there are no shared settings between your Booking pages.

Learn more about Booking pages only

Master page scenario: Team or panel page

Last Modified on Feb 3, 2021

When your Master page uses team or panel pages, you can set up specific rules to define which Team member is assigned to a booking.

Team or panel pages

Booking assignment is defined per Event type offered on your Master page. Each Event type can be provided by a specific Booking page, or a member of a Resource pool, allowing you to dynamically assign bookings to your team. This allows for flexible setup that can be different for each Master page.

You can also generate one-time links which are good for one booking only, eliminating any chance of unwanted repeat bookings. A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page. One-time links can be personalized, allowing the Customer to pick a time and schedule without having to fill out the Booking form. Learn more about using one-time links

Tip:

You can use the OnceHub for Gmail extension to schedule with general links directly from your Gmail account. You can generate links, copy them in a single click, and send them in an email.

Learn more about OnceHub for Gmail

Note:

Master pages using the Team or panel page scenario do not work with Event types that have Booking with approval or Session packages enabled.

The Customer scheduling flow

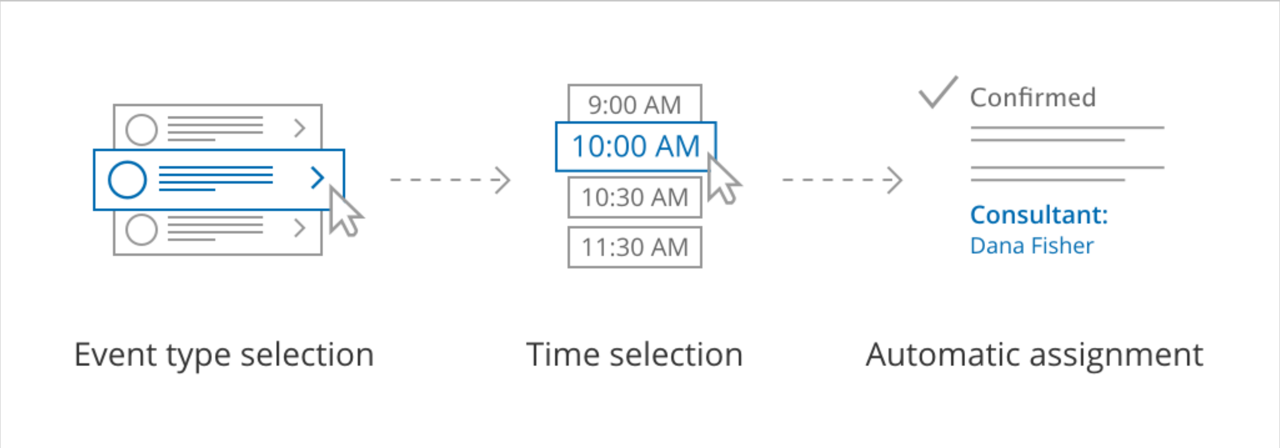


Figure 1: Team or panel pages

First, Customers select an Event type. Then, they are presented with all available times. Once they select a date and time, the booking is automatically assigned to a Team member or members according to the rules you defined.

Learn more about team or panel pages

Note:

If there is only one Event type included in the Master page, the Customer skips selecting an Event type and moves directly to choosing a time slot.

Assignment with team or panel pages

Last Modified on Oct 13, 2022

With OnceHub, you can automatically distribute bookings to Team members according to rules you define. Rules can be defined for Master pages using team or panel pages.

Tip:

When you use a Master page with team or panel pages, you can also generate one-time links which are good for one booking only, eliminating any chance of unwanted repeat bookings. A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page. One-time links can be personalized, allowing the Customer to pick a time and schedule without having to fill out the Booking form.

In this article, you'll learn about using Master pages with the team or panel page scenario.

Requirements

To set up a Master page with team or panel pages, you must be a OnceHub Administrator.

Setting up a Master page with a team or panel page scenario

1. Create a Master page by clicking the Plus button in the **Master pages** pane.
2. In the Scenario field of the **New Master page** pop-up, select the Team or panel page scenario (Figure 1).

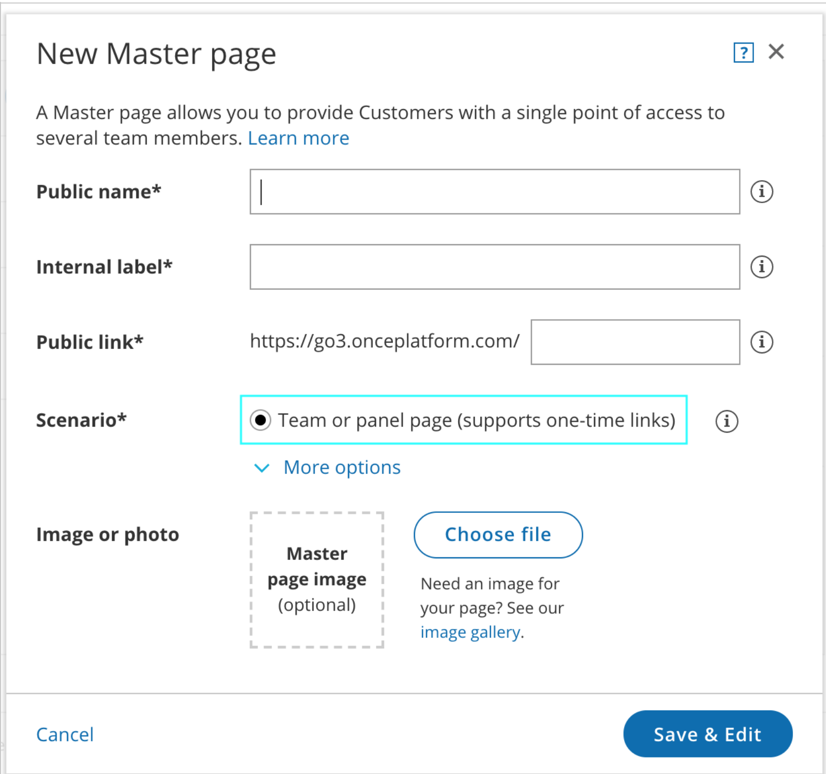


Figure 1: New Master page pop-up

3. Populate the pop-up with a **Public name**, **Internal label**, **Public link**, and an image if you choose. Then, click **Save & Edit**. You'll be redirected to the Master page Overview section to continue editing your settings.
4. Go to the Event types and assignment section of the Master page.
5. Click **Add Event type**.

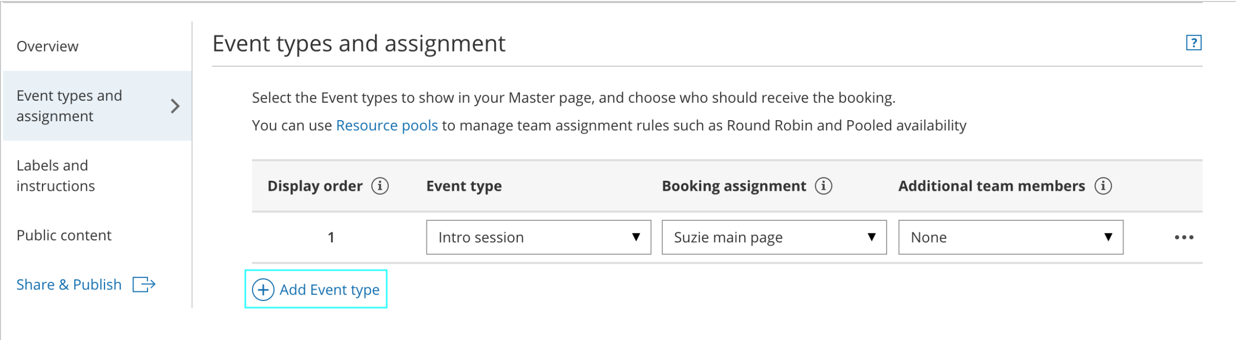


Figure 2: Add Event type to a Master page

6. Select which Event types will be offered on your Master page (Figure 3). Master pages with team or panel pages can only include Event types configured to Automatic booking and Single sessions. Learn more about conflicting settings when using team or panel pages
7. Next, use the Booking assignment drop-down to select who will provide your Event types. The Booking assignment can be a specific Booking page or a Resource pool.
8. If your Event type requires multiple team members from your organization, use the Additional team members drop-down to add them.

> **Note:**
>
> The same Resource pool cannot be selected as the Booking assignment and as the Additional team member in a single rule. Learn more about conflicting settings when using team or panel pages.

9. Reorder the Event types to make sure they appear on your Master page in the order that you want. You can move a row up or down by clicking on the left side of the row and dragging to the position you want (Figure 4).

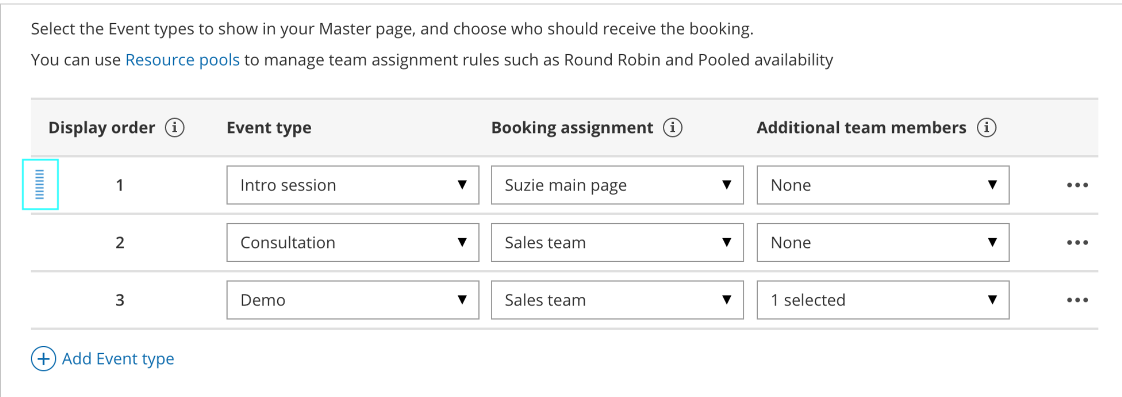


Figure 3: Click and drag a row to reorder

10. Click **Save**.

Scenarios with team or panel pages

There are a wide variety of scenarios that team or panel pages allow you to create. Here are some of the most common.

One-on-one meetings with prospects and Customers

When you conduct one-on-one meetings with prospects and Customers, you may have multiple team members who are capable of conducting the meetings. For example, your Account Executives might conduct product demos, or your Customer Success Managers might conduct onboarding sessions.

Using team or panel pages, bookings can be automatically assigned to team members in a Resource pool. Bookings will be assigned according to the distribution method you choose for the pool, whether via Round robin, Pooled availability, or Pooled availability with priority.

Meetings with multiple team members simultaneously

You may offer meetings that need the participation of multiple team members from your organization. For example, a consulting firm might need a team of consultants to attend a meeting, or a university conducting admissions interviews might need multiple faculty members and professors to attend the interview.

With team or panel pages, you can create Panel meetings with multiple team members. Each Panel meeting has a Booking assignment that determines the owner of the meeting. You can select any number of Additional team members to participate in the meeting. You can select specific Booking pages to participate in your meetings, or Resource pools to automatically assign a team member. When Customers visit your Master page, they will only see availability for the possible panel combinations.

Scheduling one-off meetings using one-time links

When you use a Master page with team or panel pages, you can generate one-time links which you can send to your Customers to schedule bookings with you. One-time links are good for one booking only, eliminating any chance of unwanted repeat bookings. A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page.

For example, you may have a Customer who wants to schedule a Support meeting to resolve a specific issue. However, you want to restrict access to your Support team because their time is limited. You can send this Customer a one-time link to schedule a booking for this specific issue.

After the Customer schedules the booking, they won't be able to use that one-time link to schedule bookings for any other issues.

Tip:

You can use the OnceHub for Gmail extension to schedule with general links directly from your Gmail account. You can generate links, copy them in a single click, and send them in an email.

Learn more about OnceHub for Gmail

Event types first (Booking pages second)

Last Modified on Feb 3, 2021

Master pages with Event types first (Booking pages second) allow Customers to first select which Event type they prefer. They can then choose a Booking page from the ones that are associated with that Event type. Finally, the Customer schedules the meeting. The pre-existing associations between Booking pages and Event types determine which Event types are offered on your Master page.

Tip:

If you would like to generate one-time links which are good for one booking only, you should use a Master page using team or panel pages.

One-time links eliminate any chance of unwanted repeat bookings. A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page. One-time links can be personalized, allowing the Customer to pick a time and schedule without having to fill out the Booking form. Learn more about one-time links

In this article, you'll learn about Master pages with Event types first.

The Customer flow

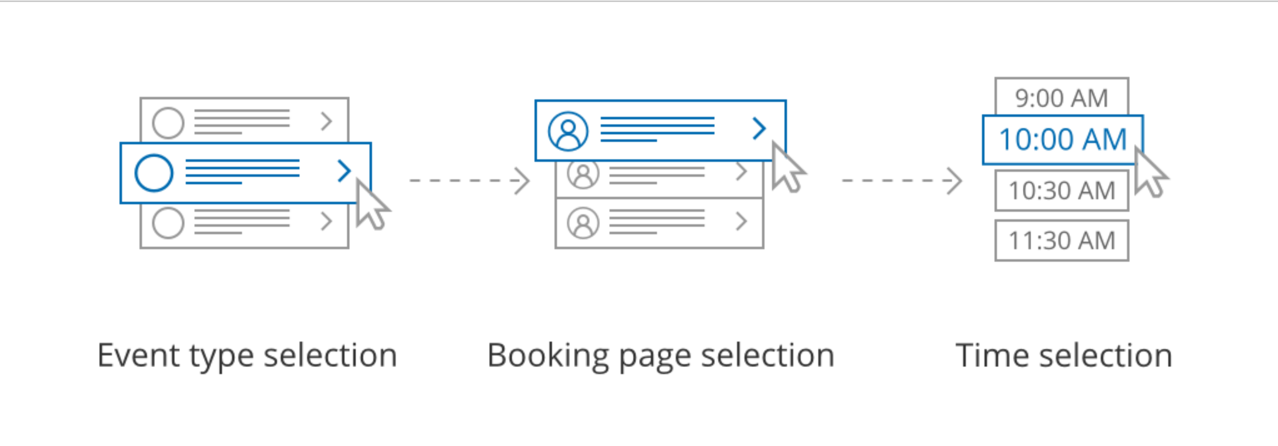


Figure 1: Customer flow for Event types first

With Event types first, the Customer first selects the Event type they prefer and then chooses from the Booking pages that provide that Event type.

After selecting a Booking page, the Customer is presented with the availability of the Booking page they selected. They can choose a date and slot and schedule the meeting.

Note:

If there is only one Event type included in the Master page, the Customer skips selecting an Event type, moving directly to choosing a Booking page.

If only one Booking page provides the selected Event type, the Customer skips selecting a Booking page, moving directly to choosing a time slot.

Requirements

To create a Master page with an Event types first scenario, you must be a OnceHub Administrator.

Setting up the Master page with Event types first

1. Create a Master page by clicking the Plus button in the **Master pages** pane.
2. In the Scenario field of the **New Master page** pop-up (Figure 2), select **Event types first**.

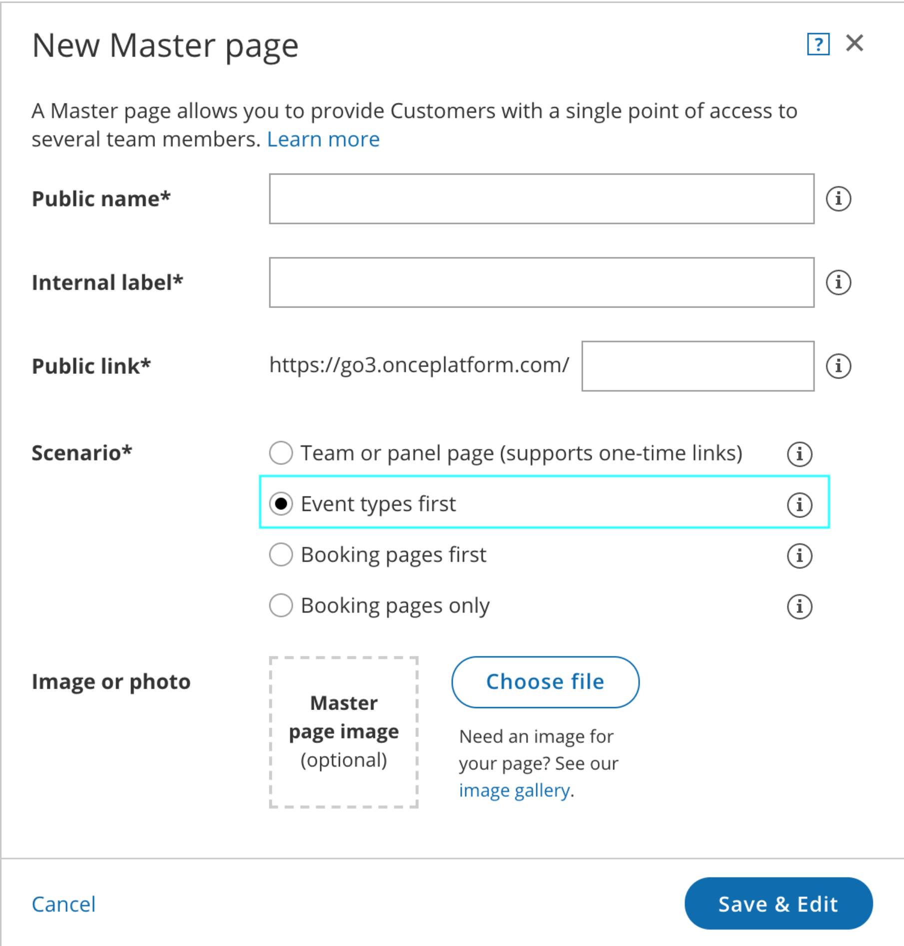


Figure 2: New Master page pop-up

3. Populate the pop-up with a **Public name**, **Internal label**, **Public link**, and an image if you choose. Then click **Save & Edit**. You'll be redirected to the Master page **Overview** section to continue editing your settings.
4. Go to the **Event types and assignment** section of the Master page.
5. Use the drop-down menu to select the Booking pages that you want to include in the Master page (Figure 3). Only Booking pages associated with Event types can be included in this Master page.

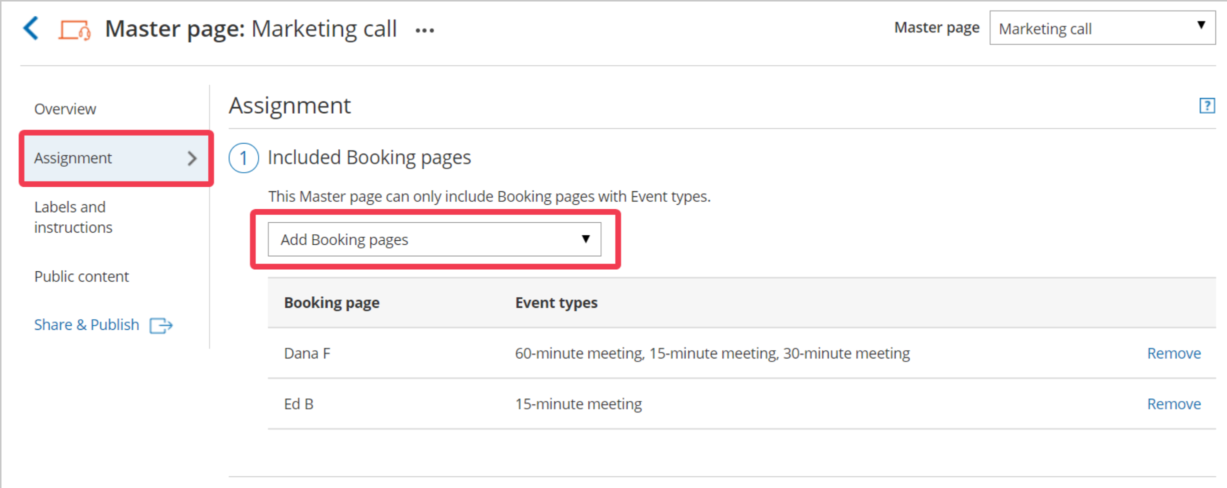


Figure 3: Add Booking pages to your Master page

6. In the **Assignment upon reschedule** section (Figure 4), you can choose to assign a rescheduled booking to the same Booking page it was originally assigned to it. To enable this, check the box marked **Reschedule is only possible on the page on which the booking was made**.

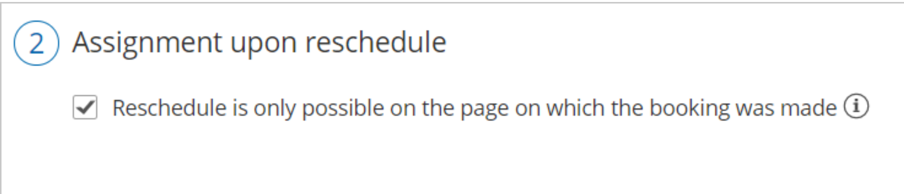


Figure 4: Assignment upon reschedule enabled

7. Click **Save**.

Booking pages first (Event types second)

Last Modified on Jan 27, 2021

Master pages with Booking pages first (Event types second) allow Customers to first select which Booking page they prefer. They can then choose an Event type from the ones that are associated with that Booking page. Finally, the Customer schedules the meeting. The preexisting associations between Booking pages and Event types determine which Event types are offered on your Master page.

Tip:

If you would like to generate one-time links which are good for one booking only, you should use a Master page using Rule-based assignment with Dynamic rules.

One-time links eliminate any chance of unwanted repeat bookings. A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page. One-time links can be personalized, allowing the Customer to pick a time and schedule without having to fill out the Booking form. Learn more about one-time links

In this article, you'll learn about Master pages with Booking pages first.

The Customer flow

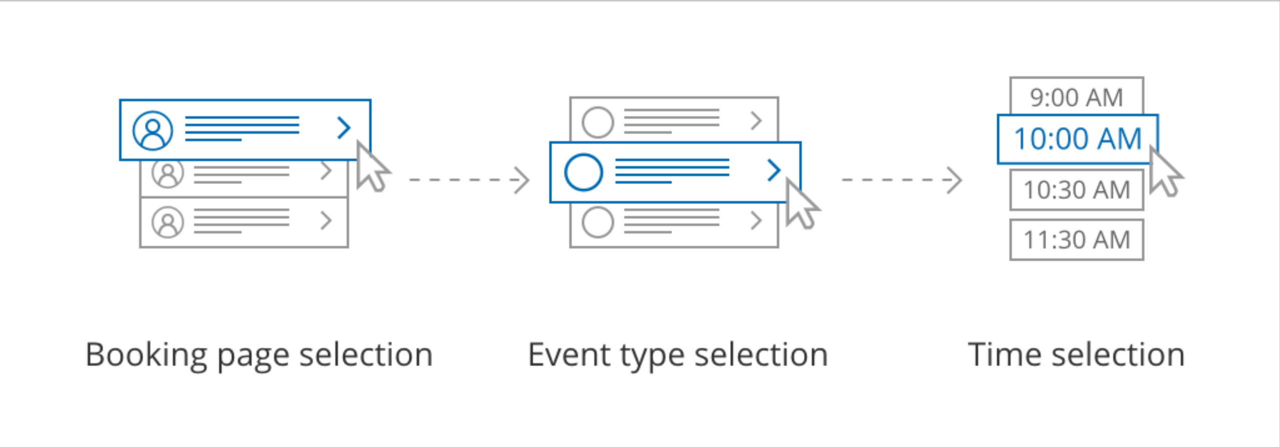


Figure 1: Customer flow for Booking pages first.

With Booking pages types first, the Customer first selects the Booking page they prefer and then chooses from the Event types offered by that Booking page.

After selecting an Event type, the Customer is presented with the availability of the Booking page they selected. They can choose a date and time and schedule the meeting.

Note:

If there is only one Booking page included in the Master page, the Customer skips the Booking page selection step. They move directly to choosing an Event type.

If the selected Booking page offers only one Event type, the Customer skips the Event type selection step and moves directly to choosing a time slot.

Requirements

To create a Master page with a Booking pages first scenario, you must be a OnceHub Administrator.

Setting up a Master page with Booking pages first

1. Create a Master page by clicking the Plus button in the **Master pages** pane.
2. In the Scenario field of the **New Master page** pop-up (Figure 2), select **Booking pages first (Event types second)**.

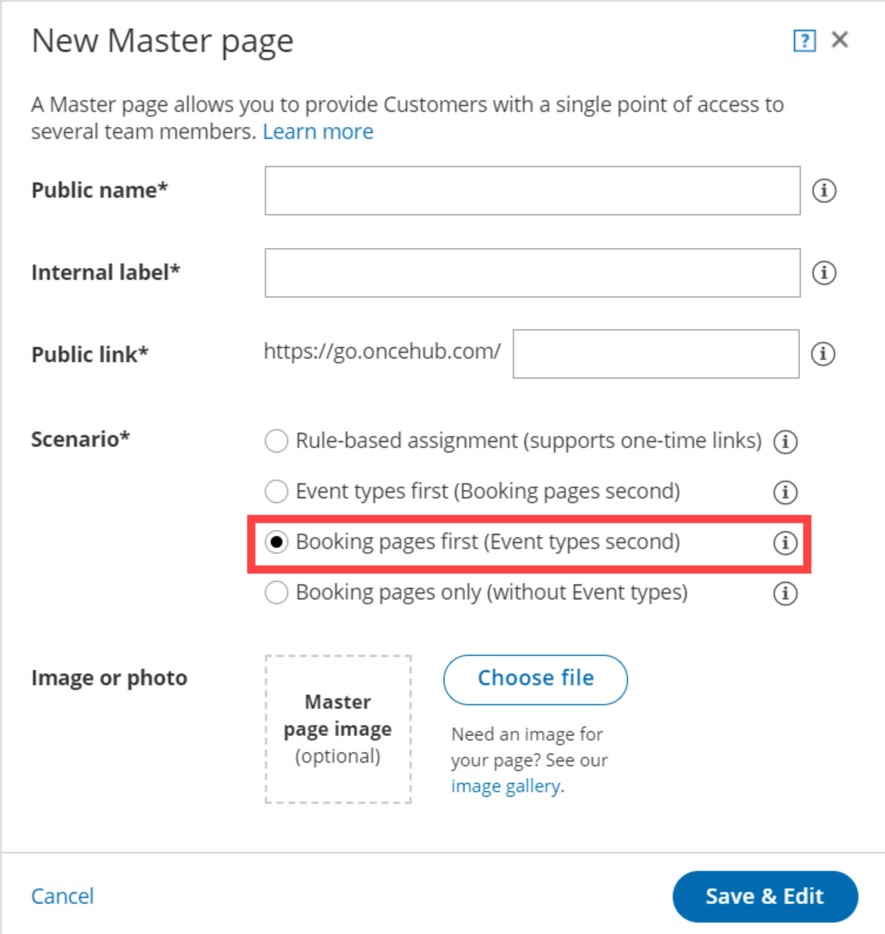


Figure 2: New Master page pop-up

3. Populate the pop-up with a **Public name**, **Internal label**, **Public link**, and an image if you choose. Then click **Save & Edit**. You'll be redirected to the Master page Overview section to continue editing your settings.
4. Go to the Assignment section of the Master page.
5. Use the drop-down menu to select the Booking pages that you want to include in the Master page (Figure 3). Only Booking pages associated with Event types can be included in this Master page.

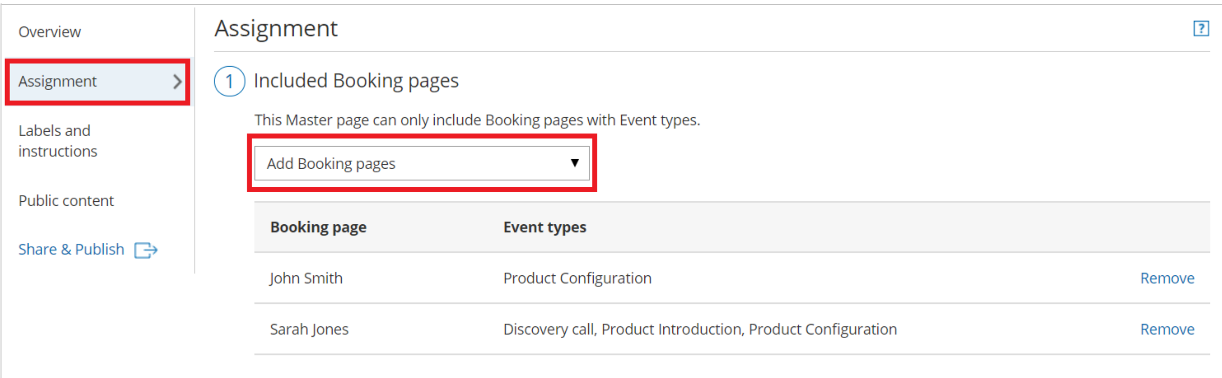


Figure 3: Add Booking pages

6. In the **Assignment upon reschedule** section (Figure 4), you can choose to assign a rescheduled booking to the same Booking page it was originally assigned to. To enable this, check the box marked **Reschedule is only possible on the page on which the booking was made**.

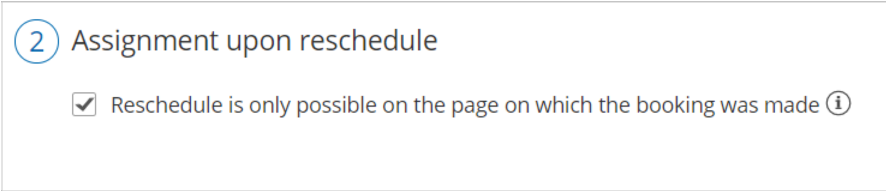


Figure 4: Assignment upon reschedule enabled

7. Click **Save**.

Booking pages only (without Event types)

Last Modified on Jan 27, 2021

Master pages with Booking pages only (without Event types) allow Customers to only select which Booking page they prefer. Bookings are assigned according to the Customer's selection. This option is useful if you don't use Event types and there are no shared settings between your Booking pages.

Tip:

If you would like to generate one-time links which are good for one booking only, you should use a Master page using Rule-based assignment with Dynamic rules.

One-time links eliminate any chance of unwanted repeat bookings. A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page. One-time links can be personalized, allowing the Customer to pick a time and schedule without having to fill out the Booking form. Learn more about one-time links

In this article, you'll learn about Master pages with Booking pages only.

The Customer flow

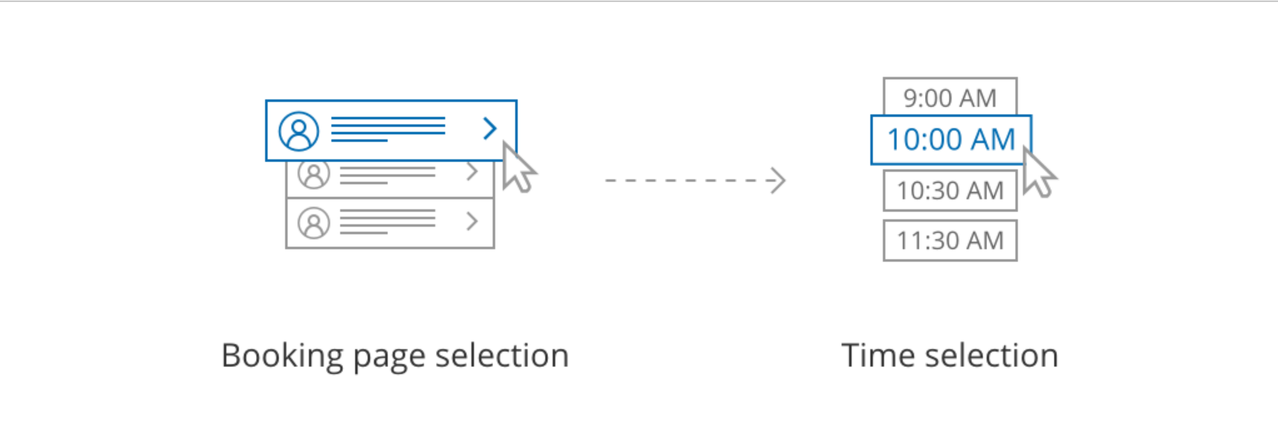


Figure 1: Customer flow for Booking pages only

With Booking pages only, the Customer selects a Booking page and is presented with the Booking page's availability. The Customer then selects a date and time and schedules the meeting.

Requirements

To create a Master page with a Booking pages only scenario, you must be a OnceHub Administrator.

Setting up a Master page with Booking pages only

1. Create a Master page by clicking the Plus button in the **Master pages** pane.
2. In the Scenario field of the **New Master page** pop-up (Figure 2), select **Booking pages only (without Event types)**.

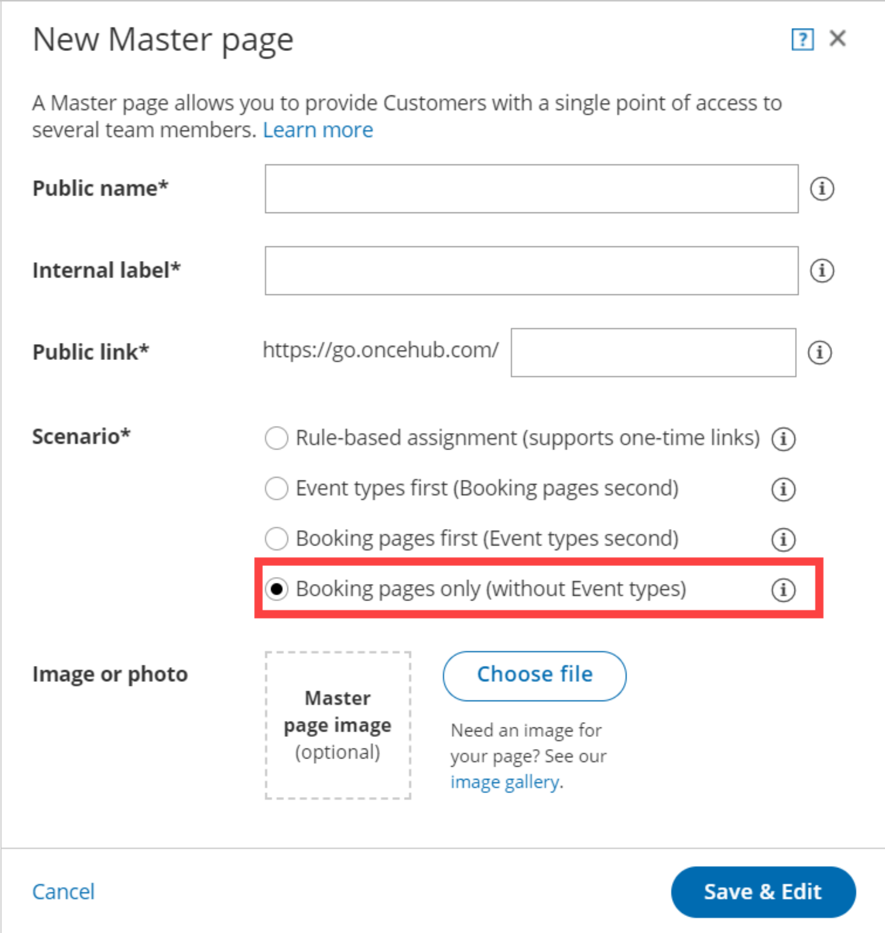


Figure 2: New Master page pop-up

3. Populate the pop-up with a **Public name**, **Internal label**, **Public link**, and an image if you choose. Then click **Save & Edit**. You'll be redirected to the Master page Overview section to continue editing your settings.
4. Go to the Assignment section of the Master page.
5. Use the drop-down menu to select the Booking pages that you want to include in the Master page (Figure 3). Only Booking pages that are not associated with any Event types can be included in this Master page.

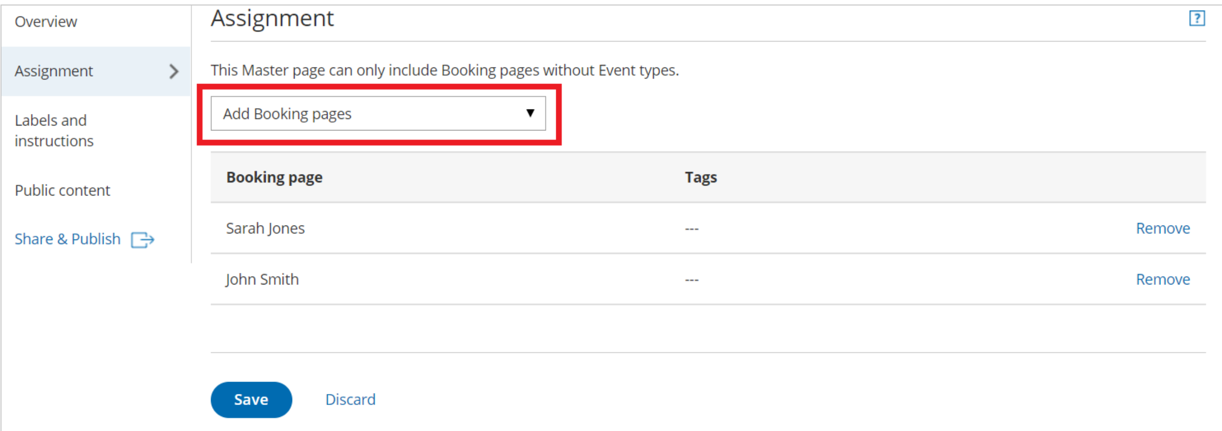


Figure 3: Add Booking pages to your Master page

6. Click **Save**.

Master page: Overview section

Last Modified on Oct 13, 2022

The Master page **Overview** section summarizes the main properties of the specific Master page. It includes the Master page's main settings, the Booking pages and Event types associated with it, and Share & Publish options.

Your Master page is enabled to accept bookings by default. You can disable your Master page to stop accepting bookings by clicking the **Accept bookings** toggle in the top right.

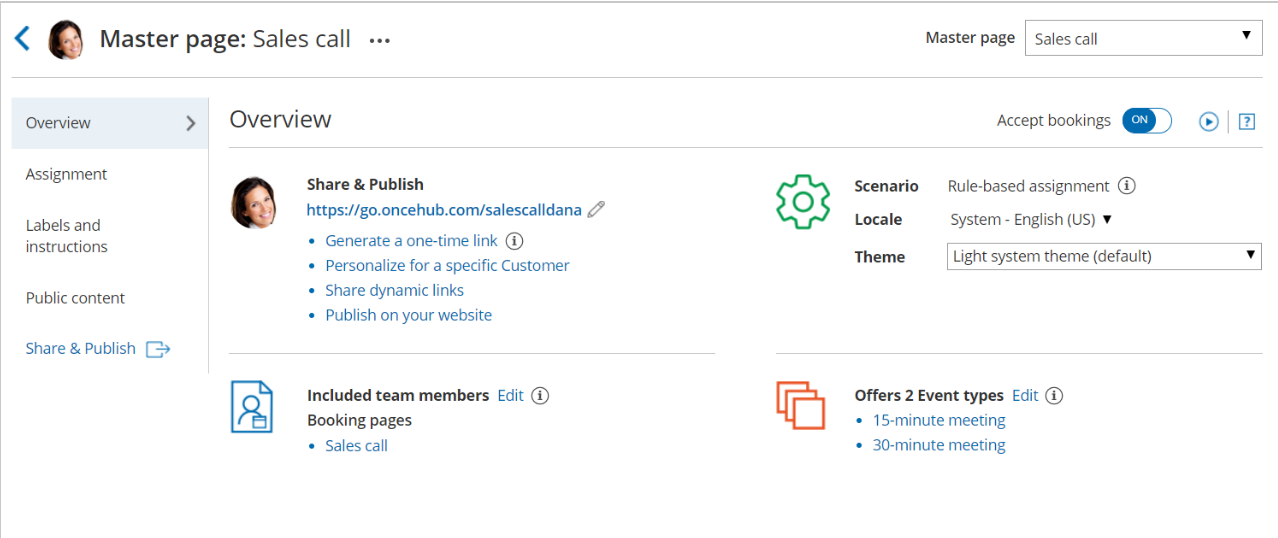


Figure 1: Master page Overview section

To switch between the Overview sections of different Master pages without returning to **Booking pages scheduling setup**, use the shortcut drop-down in the top right corner of the Overview.

Below you can find out more about the different parts of the Master page Overview section.

Main settings

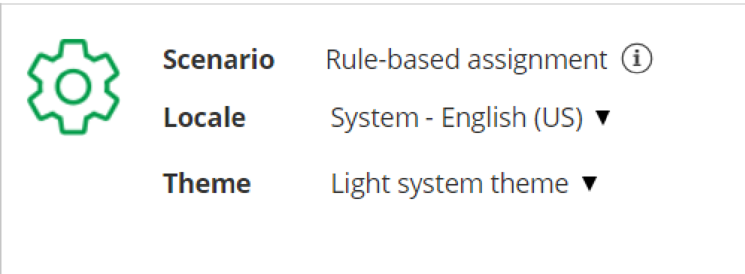


Figure 2: Main settings section

- **Scenario**: The selected Master page scenario will be listed here. The scenario determines the scheduling flow. Master pages can have one of four different flows: Rule-based assignment, Event types first (Booking pages second), Booking pages first (Event types second), or Booking pages only.
- **Locale:** The selected locale determines the date, date format, and language of the page. The Master page locale overrides the locale of any included Booking pages. Learn more about the Localization editor
- **Theme:** To ensure visual consistency, the Master page theme overrides the theme applied to each Booking page included in the Master page. The theme applied to the Master page determines the logo, design, and branding.

Share & Publish

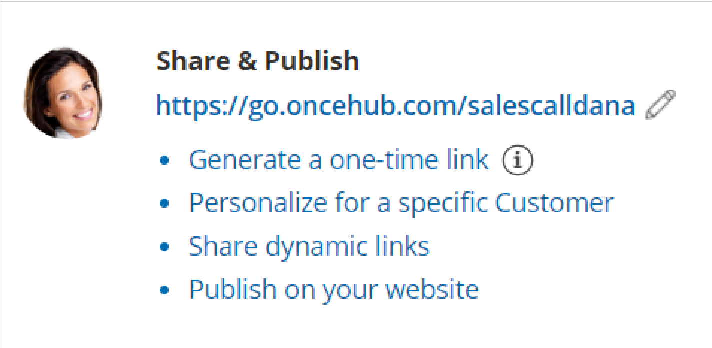


Figure 3: Share & Publish section

- **Public link:** This is your Master page link that your Customers can use to schedule bookings with you. Learn more about General links
- **Generate a one-time link:** When you use a Master page using Rule-based assignment with Dynamic rules, you can generate one-time links which are good for one booking only. A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page. One-time links can be personalized, allowing the Customer to pick a time and schedule without having to fill out the Booking form. Learn more about one-time links
- **Personalize for a specific Customer:** Create a static link for a specific Customer. With this link, your Customer will be able to book without having to fill out their name and email. You create this type of link for each Customer individually. Learn more about Personalized links for a specific Customer
- **Share dynamic links:** Create a dynamic link which you can share via your CRM or mass email campaign tool.
- **Publish on your website:** Generate code that you can add into your website code so that you can integrate scheduling into your website.

Included team members

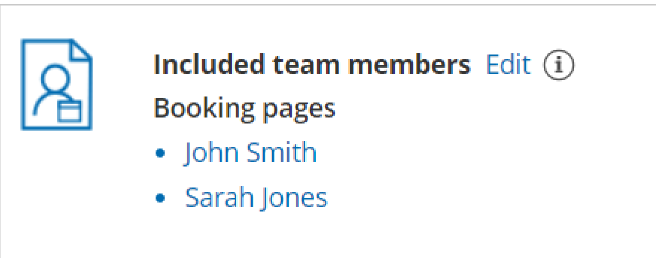


Figure 4: Included team members

Each Master page provides a single point of access to multiple Booking pages.

- If the Master page scenario is Event types first, Booking pages first, or Booking pages only, then your Customers will manually select the provider on your Master page.
- If the Master page scenario is Rules-based assignment, bookings will be automatically assigned to the relevant provider based on the Assignment rules you define.

Event types offered by the Master page

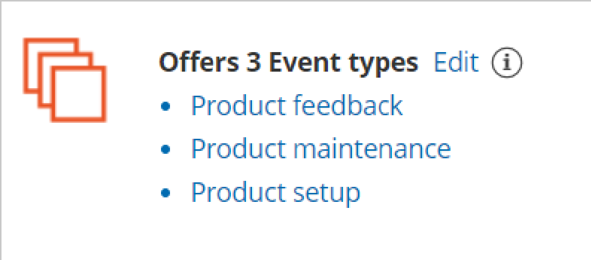


Figure 5: Event types offered by the Master page

If you offer Event types on your Master page, your Customers can select the type of meeting they require before selecting the date and time. Depending on your Master page scenario, Event types are added to Master pages either directly in the Assignment section, or indirectly through the Booking pages they are associated with.

Master page: Event types and assignment section

Last Modified on Oct 13, 2022

The **Event types and assignment** section of a Master page is where you determine how the bookings made on the Master page will be assigned to your Team members. This section is different depending on which scenario you selected for your Master page.

The four scenarios you can choose from are:

- Team or panel page
- Booking pages first
- Event types first
- Booking pages only

Tip:

If you would like to generate one-time links which are good for one booking only, you should use a Master page using a Team or panel page.

One-time links eliminate any chance of unwanted repeat bookings. A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page. One-time links can be personalized, allowing the Customer to pick a time and schedule without having to fill out the Booking form. Learn more about one-time links

Requirements

To define the **Event types and assignment** section of a Master page, you must be a OnceHub Administrator.

Building a team or panel page

The associations between Event types and Meeting providers are created on the Master page, allowing for a flexible setup that can be different for each Master page.

1. Go to the **Event types and assignment** section
2. Click **Add Event type**.

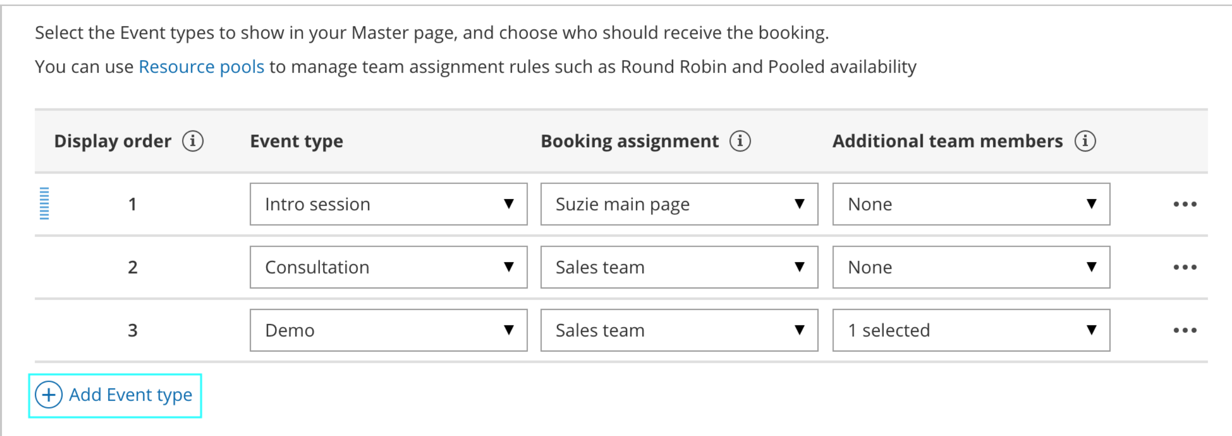


Figure 1: Add an Event-based rule

3. Select which Event types will be offered in your Master page (Figure 1). Master pages with team or panel pages can

only include Event types configured to Automatic booking and Single session. Learn more about conflicting settings when using team or panel pages

4. Next, use the Booking assignment drop-down to select who will provide your Event types. You can select a specific Booking page or a Resource pool.
5. If your Event type requires multiple team members from your organization, use the Additional team members drop-down to add them. These team members can be defined by selecting specific Booking pages or by selecting Resource pools.

> **Note :**
>
> The same Resource pool cannot be selected as the Booking assignment and as the Additional team member in a single rule. Learn more about conflicting settings when using team or panel pages

6. Reorder the Event types to ensure they appear on your Master page in the order that you want. You can move a row up or down by clicking on the left side of the row and dragging to the position you want (Figure 2).

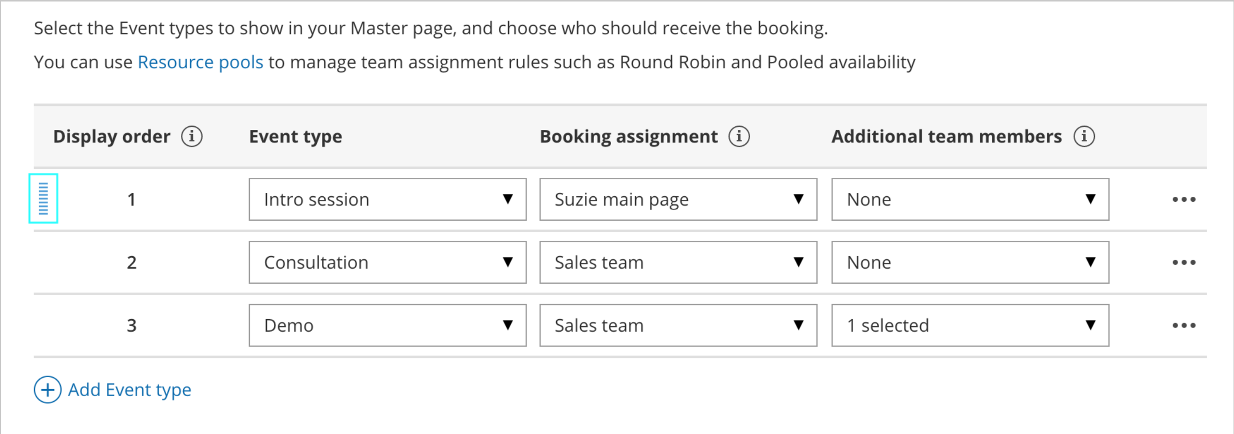


Figure 2: Click and drag a row to reorder

7. Click **Save**.

Master pages with Event types first or Booking pages first

1. Go to **Booking pages** on the left and select the relevant Master page.
2. Click on the **Event types and assignment** section of the Master page.
3. Use the drop-down menu to select the Booking pages that you want to include in the Master page (Figure 3). Only Booking pages that are associated with Event types can be selected.

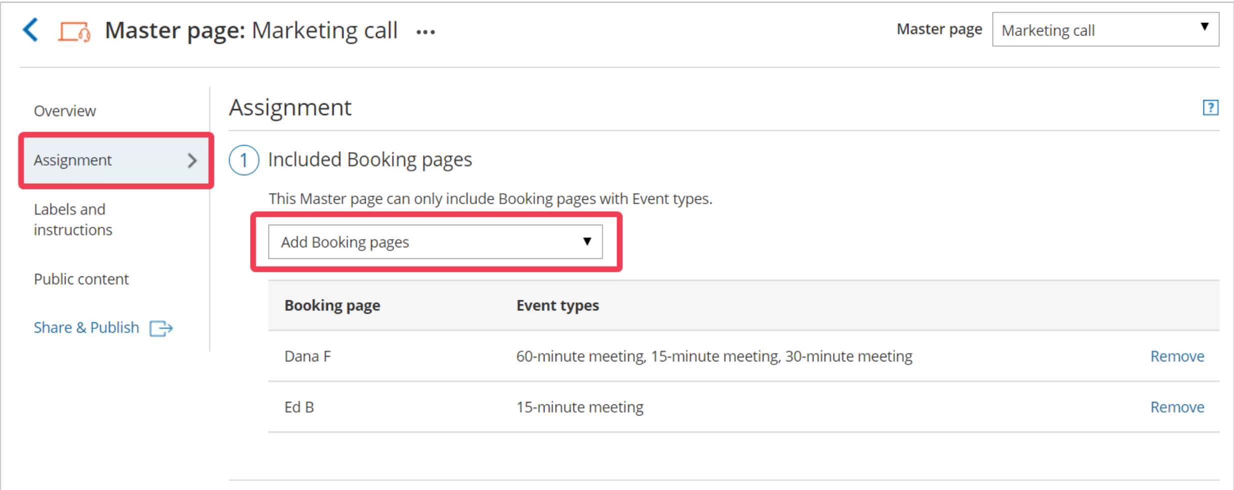


Figure 3: Adding Booking pages to your Master page

4. In the **Assignment upon reschedule** section, you can choose to assign a rescheduled booking to the same Booking page it was originally assigned to it. To enable this, check the box marked **Reschedule is only possible on the page on which the booking was made**.
5. Click **Save**.

Master pages with Booking pages only

1. Go to **Booking pages** on the left and select the relevant Master page.
2. Click on the **Event types and assignment** section of the Master page.
3. Use the drop-down menu to select the Booking pages that you want to include in the Master page (Figure 4). Only Booking pages that are not associated with any Event types can be included in this Master page.

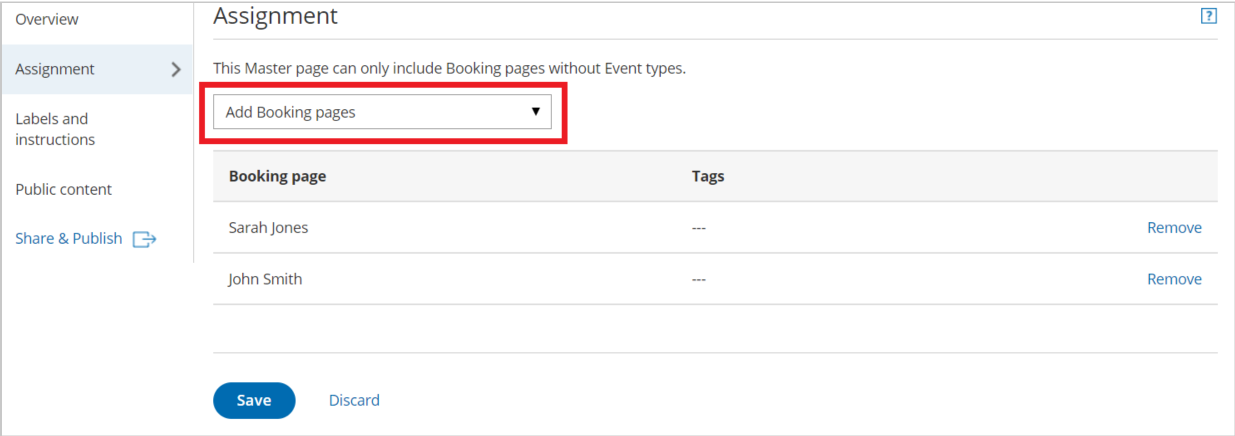


Figure 4: Adding Booking pages to your Master page

4. Click **Save**.

Master page: Labels and instructions section

Last Modified on Oct 13, 2022

In the Master page **Labels and instructions** section, you can define the public labels for the different entities in your Master page. You can also customize instructions that will help your Customers make the right selections during the scheduling process.

You can access this section by going to to **Booking pages** on the left and select the relevant Master page → **Labels and instructions**.

Note:

The settings vary based on the Master page scenario, and whether you have public categories in your account.

Public label

Public labels are Customer-facing and are displayed during the scheduling process as the Customer makes selections. They are also used in scheduling confirmation pages and emails. If you have public categories in your account, you can set their labels here as Customers will see them.

For example, if the Event types in your Master page represent a product (Figure 1), then it will be listed as such in the confirmation page (Figure 2).

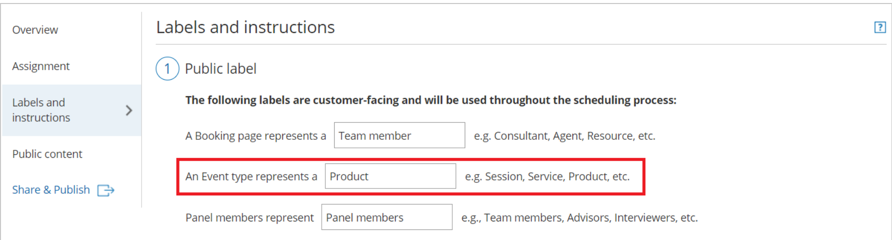


Figure 1: Adding a public label to an Event type

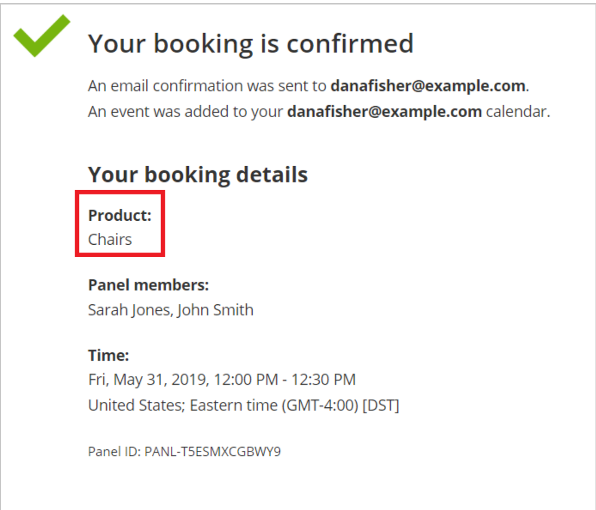


Figure 2: Booking confirmation page

Selection instructions

In this section, you tell Customers what they should select. This section and its contents are different depending on the scenario you chose for your Master page. Only relevant fields will be displayed.

Specify the instructions to help your Customers understand what they are choosing. These instructions appear in the appropriate steps in the booking process.

For example, if you make the **Selection instructions for Event types** "Select a product" (Figure 3), then the title of the Event type selection step in the Customer scheduling flow will be "Select a product" (Figure 4).

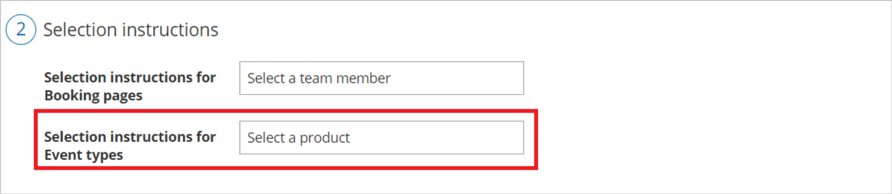


Figure 3: Selection instructions section

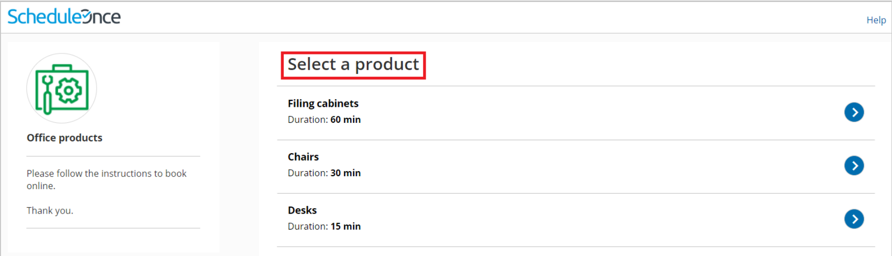


Figure 4: Event type selection

Master page: Public content section

Last Modified on Oct 13, 2022

In the Public content section, you can define information that will help your Customers understand what your Master page is for. You can include basic information about yourself, your organization, your meeting type, location or your staff member and write a welcome message to the Customers who schedule time with you.

The Public content is used when your page is in **Enabled** status as well as in **Disabled** status. When you disable your Master page, you can keep the Public content section as is, or change it to display a different message.

Location of the Public content section

You can access this section by going to **Booking pages** on the left and select the relevant Master page **→ Public content** (Figure 1).

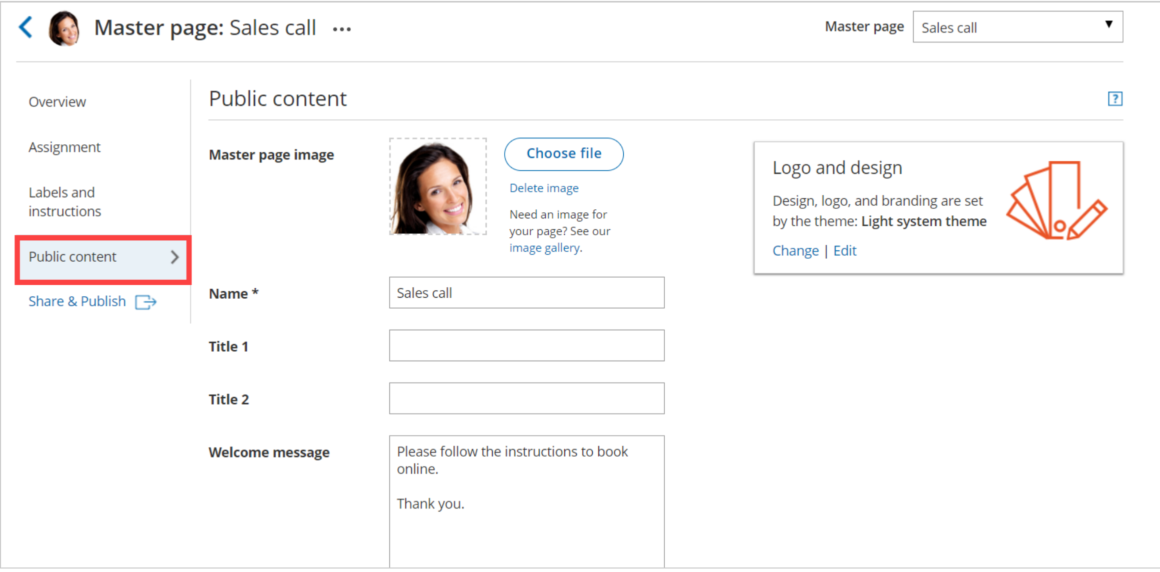


Figure 1: Master page Public content section

Public content features

Add a Master page image

Upload a photo or any other image in JPG, PNG or GIF format (max 200KB). It will be cropped or scaled to a 200 x 200 pixels rectangle as part of the upload process.

Add a Master page name

Enter the name of your page. It can be your name, your organization's name, or the type of meeting your Customers are booking. You can use up to 75 characters, including spaces.

Add Titles

Enter subheadings to the name of your page.

Add a Welcome message

You can enter up to 2,000 characters with spaces.

The welcome message can include hyperlinks (clickable URLs). The Welcome message also allows you to include HTML links.

For instance, adding this code in the Public content session:

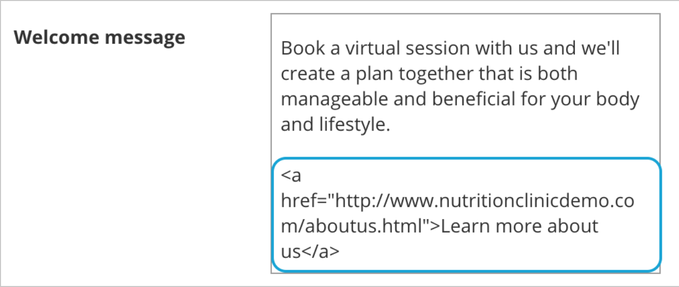


Figure 2: HTML link in the Event type description

Note:

Do not create a line break after **<a** at the start of the code. In the above graphic, it wraps to the next line automatically due to spacing. However, your entry should not have any extra line breaks.

...results in this link shown on the customer end:

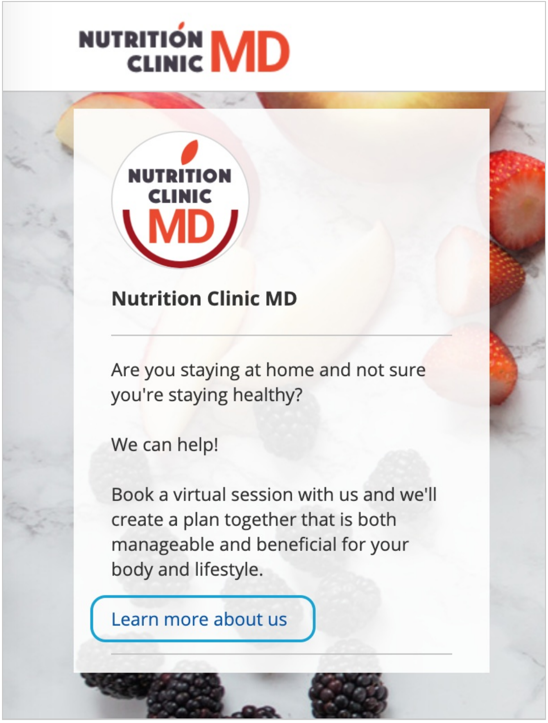


Figure 3: Event type description including HTML link

Add Phone and Email

Enter a phone number and email address for your Customers to contact you.

Add a Website link

Enter a URL to reference your organization's website or another relevant site you want to provide to people booking with you. The link entered will also automatically make the header logo at the top clickable, directing to the same URL.

Social media links

Add a link to Twitter

Copy and paste your full Twitter URL. It can be a personal or company handle, and must start with https://twitter.com/

Add a link to LinkedIn

Copy and paste your full LinkedIn URL. It can be a personal or company profile, and must start with https://www.linkedin.com/

Add a link to Facebook

Copy and paste your full Facebook URL. It can be a personal or company page, and must start with https://www.facebook.com/

Note:

By default, the customer-facing interface also includes OnceHub branding in the left pane of your Master page; for instance, "Powered by OnceHub." You can adjust this according to your preference in your OnceHub account **Settings** page. Learn more

Using Booking page tags in Master pages

Last Modified on Jul 16, 2020

Tags are specific keywords added to your Booking pages. Tags enable customers to filter Booking pages by keywords and find the person with whom they need to book in a fast and efficient manner.

Tags can be used on their own in a Master page that lists Booking pages only, or they can be used together with Event types and categories, adding an additional filtering dimension.

Using Booking pages with tags only

The simplest scenario when using tags is to add the tags to individual Booking pages and group them under a Master page. In this scenario, tags are the only way to filter Booking pages.

For example, you can group multiple Booking pages into a Master page and use tags to enable Customers to filter by role.

See a live example of a scheduling scenario that uses tags

Using Booking pages with categories and tags

Booking page categories and tags can complement each other. Categories provide a way to create a hierarchical tree structure, while tags provide non-hierarchical keyword filtering capability.

For example, you have several Team members who need to accept Customer appointments in a show. Each Team member is assigned different tags according to their areas of expertise. When all the Team members are grouped under one Master page, Customers are able to use tags to filter the Team member list and see only the Team members who match their tag selection.

See a live example of a scheduling scenario that uses categories and tags

Using Booking pages with Event types and tags

Booking page tags can add an additional filtering dimension to Booking pages that have already been filtered by Event type. For example, Event types allow the Customer to select a duration for room reservation and once a time is selected, available rooms can be filtered by room property.

See a live example of a scheduling scenario that uses tags after selecting a service, date, and time

Tag behavior on the Customer interface

1. Tags are listed in the order that the Booking pages are listed on the Master page. If a Booking page has multiple tags, they are listed in the order that they were added.
2. By default, "All" is selected and all Booking pages are displayed.
3. The Customer selects one or more tags from the list, which filters the Booking pages accordingly.
4. Finally, the Customer selects a Booking page from the filtered results and makes a booking.

Note:

Customers can view and filter by tags on the Master page if you have checked at least one tag for a specific

Booking page. You should ensure that all Booking pages included on the Master page have tags, so your Booking pages can offer your Customers a fully functional tag filtering experience.

Conflicting settings when using team or panel pages

Last Modified on Feb 3, 2021

Team or panel pages are not compatible with the following configuration settings and vice versa:

- Booking with approval: Team or panel pages do not work with Booking with approval mode. Team or panel pages can only work when your Event type is set to Automatic booking mode.
- Session packages: Team or panel pages do not work with Session packages. Team or panel pages can only work when your Event type is set to Single session.

Additionally, when setting up team or panel pages, please note the following restrictions:

- **An Event type can be used once per Master page**: Each Event type can only be selected once per Master page. This means that each rule on a given Master page must have a different Event type.
- **A Resource pool can be used once per Event type**: Each Resource pool can only be selected once per Event type. That means that Event types cannot have multiple Team members from the same Resource pool. If you are using Panel meetings, you cannot select the same Resource pool for your Booking assignment team member and for your Additional team members.
- **A Booking page can be used once per Event type:** Each Booking page can only be selected once per Event type. That means that if you are using Panel meetings, you cannot select the same Booking page for your Booking assignment team member and for your Additional team members.

Disabling your Master page

Last Modified on Oct 13, 2022

If you don't want to accept bookings on your Master page but don't want to delete it, you can disable it instead. When you disable your Master page, your settings remain intact and you can enable it again at any time.

In this article, you'll learn how to disable your Master page.

Disabling your Master page

1. Go to **Booking pages** on the left.
2. Select the specific Master page that would like to disable.
3. In the Master page Overview section, set the **Accept bookings** toggle to OFF (Figure 1).

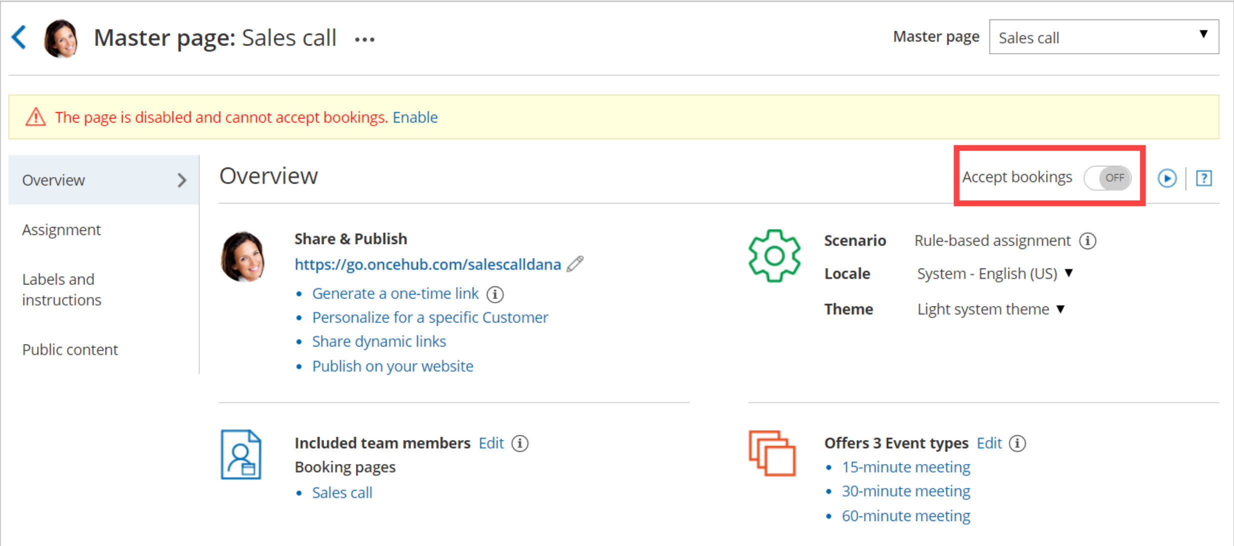


Figure 1: Accept bookings toggle set to OFF

Note:

If you want to completely delete your Master page, go to **Booking pages** on the left, click the action menu (three dots) of the relevant Master page, and select **Delete**.

When you delete your Master page, all the settings associated with the page are permanently deleted too.

Effects of disabling your Master page

When your Master page is disabled, Customers are not able to make new bookings or to reschedule or cancel existing bookings.

- The Public content section is still visible to your Customers whether your page is enabled or disabled. This means that you may need to consider changing your personal message.
- An alert message is shown on the Master page Overview section with a link to re-enable the page.
- The status of the Master page is indicated as **[Disabled]** in the Master page list (Figure 2).

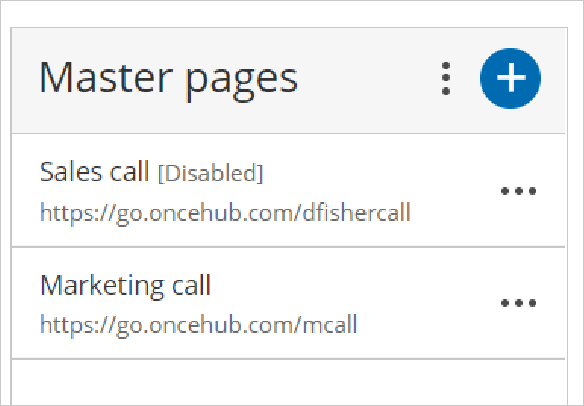


Figure 2: Master page list

- The following message is shown to Customers when they try to scheduling a booking using the Master page (Figure 3).

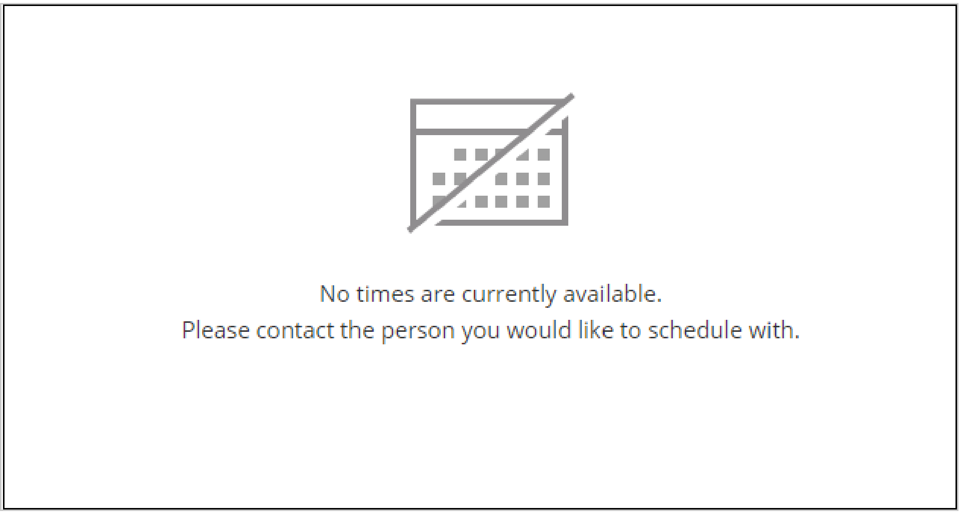


Figure 3: No times are currently available message

Introduction to Resource pools

Last Modified on Oct 15, 2024

Resource pools allow you to dynamically distribute bookings among a group of Team members in the same department, location, or with any other shared characteristic.

Each Resource pool has its own method for distributing bookings. As bookings come in, you'll be able to monitor how many bookings each Team member receives and ensure an optimal distribution of bookings at any point in time.

Distribution methods

Each Resource pool has its own method for distributing bookings among Team members. Which distribution method is right for you depends on your scheduling scenario.

Round robin

With Round robin assignment, bookings will be assigned to the next Team member in line. When Customers visit your page, they will only see the availability of the designated Team member. This ensures an equal and fair distribution among the members of your pool.

For example, Round robin is useful when you want to distribute demos or initial consultations to Account Executives. Each Account Executive will have an equal opportunity to achieve their sales goals.

Learn more about Round robin

Pooled availability

With Pooled availability, your entire team's availability will be combined into a single booking calendar. When a Customer selects a time, the booking is automatically assigned to the Team member with the longest idle time, meaning the Team member who has not received a booking in the longest time. Pooled availability allows you to provide maximum availability to Customers.

For example, Pooled availability could be useful for a Customer Success team who may be conducting onboarding sessions or support sessions.

Learn more about Pooled availability

Pooled availability with priority

With Pooled availability with priority, your entire team's availability will be combined into a single booking calendar. When Customers select a time, the booking is automatically assigned to the available Team member with the highest priority.

Pooled availability with priority allows you to provide maximum availability to customers, while ensuring the most qualified Team member conduct your meetings.

Learn more about Pooled availability with priority

Resource pool sections

Overview

This section gives you a summary of your Resource pool's main properties:

- Distribution method
- Reporting cycle
- Time zone
- Included Booking pages
- Which Master pages it is included in

You will also see real-time booking metrics including the number of bookings distributed in your pool, the average number of bookings per Booking page, and the most and least booked Booking pages.

Learn more about the Overview section

Resources

This section is where you determine which Booking pages are included in your Resource pool. For each Booking page you include, you'll be able to see the following information:

- The date joined.
- Whether the page is actively participating and receiving bookings.
- The number of bookings each Booking page received.
- The number of bookings removed.

If you're using Pooled availability with priority as your distribution method, you'll also be able to assign each Booking page a priority. If you are using the Round robin distribution method, you'll be able to toggle on Automatic correction, to compensate for bookings that are removed.

Learn more about the Resources section

Creating a Resource pool

Last Modified on Oct 12, 2022

Resource pools allow you to dynamically distribute bookings among a group of Team members in the same department, location, or with any other shared characteristic.

Each Resource pool can have its own method for distributing bookings. As bookings come in, you'll be able to monitor how many bookings each Team member receives and ensure an optimal distribution of bookings at any point in time. You can create as many Resource pools as you need to meet your organization's requirements.

In this article, you'll learn how to create a Resource pool.

Requirements

To create Resource pools, you must be a OnceHub Administrator.

How to create a new Resource pool

1. Goto **Booking pages** in the bar on the left.
2. Select **Resource pools** (Figure 1) on the left.

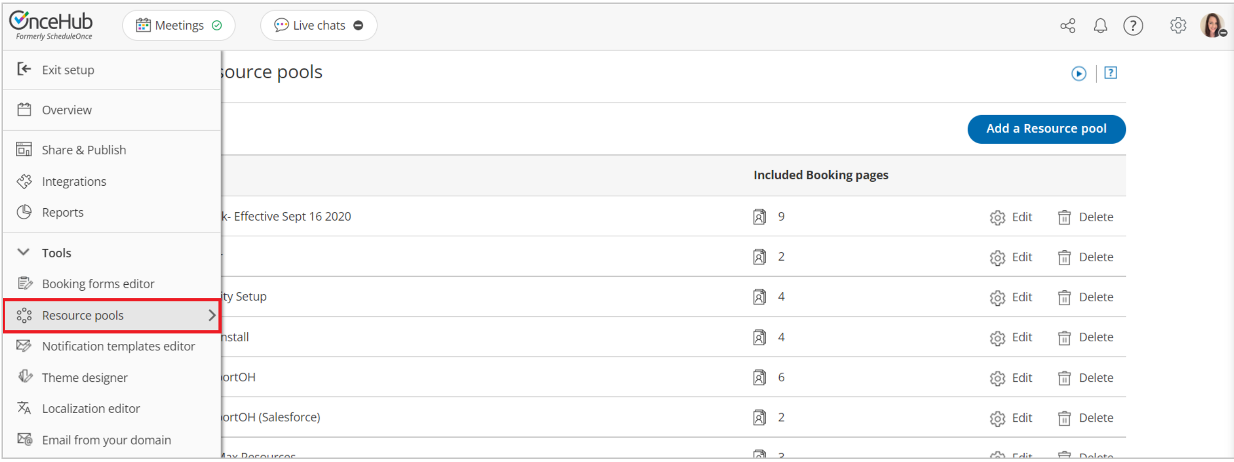


Figure 1: Resource pools in the Tools section

3. Click the **Add a Resource pool** button on the right.
4. The **New Resource pool** pop-up appears (Figure 2).

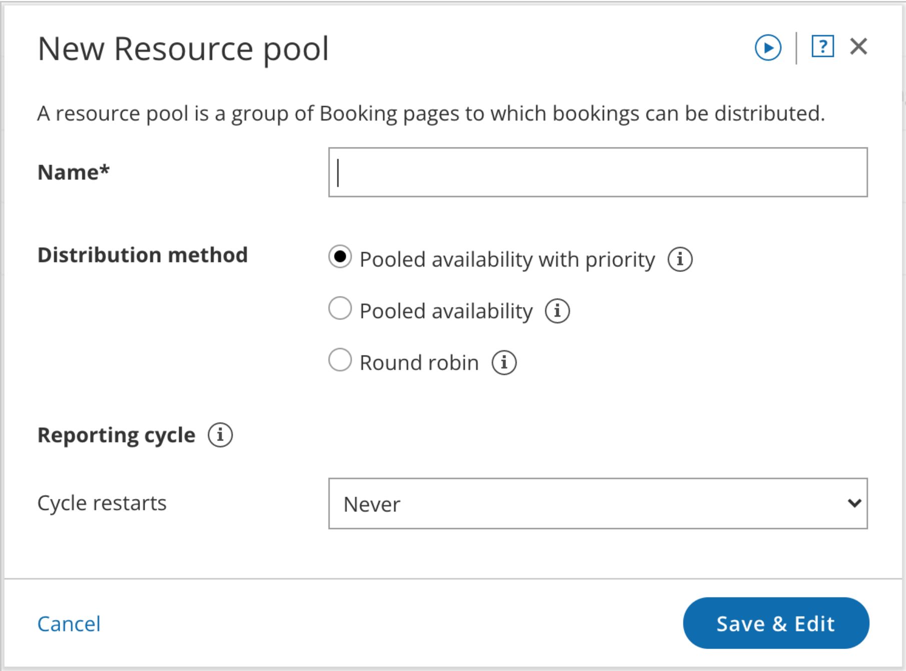


Figure 2: New Resource pool pop-up

Next, you'll need to define the properties for your Resource pool.

Note:

These properties cannot be changed once the Resource pool has been created.

5. Add a name for your Resource pool. It's useful to give it a name related to what it represents. For example, if the pool will group together Team members in your Sales department, name the pool **Sales team**.
6. Select a method for distributing bookings among the Team members in the pool. The best method to choose depends on each team's requirements.
   - Pooled availability with priority: This is a hybrid method which provides Customers with the maximum amount of time slots while also giving priority to specific Team members. When scheduling, Customers see the combined availability of all team members in one booking calendar. When the Customer selects a time, the booking is assigned to the Team member with the highest priority ranking.
   - Pooled availability: This method is Customer-focused and should be used if you want to provide Customers with the maximum number of time slots. When scheduling, Customers see the combined availability of all Team members in one booking calendar. When the Customer selects a time, the booking is assigned to the Team member with the longest idle time.
   - Round robin: This method is organization-focused and should be used if you want to ensure a fair and equal distribution among your Team members. When scheduling, Customers will only be presented with the availability of the next Team member in line.
7. Choose the reporting cycle for your Resource pool. This determines how often the statistics for your pool will be reset. The reporting cycle can be monthly, quarterly, or go on continuously. Select the reporting cycle you use in your organization to ensure your scheduling stats are fully aligned with your business metrics.

Note:

If the Reporting cycle of the Resource pool is **Every calendar month** or **Every calendar quarter**, you'll be required to define the time zone that will be used every Reporting cycle to reset the statistics for your pool. Learn more about Resource pool Reporting cycles

8. Click **Save & Edit**.

You'll be redirected to the Resource pool Overview section. This section gives you a summary of your Resource pool's main properties. Here, you will also see real-time booking metrics once your pool starts receiving bookings. The next step is to add the Booking pages of your Team members to your Resource pool.

Adding Booking pages to your Resource pool

1. Go to the **Resources** section of your new Resource pool (Figure 3).

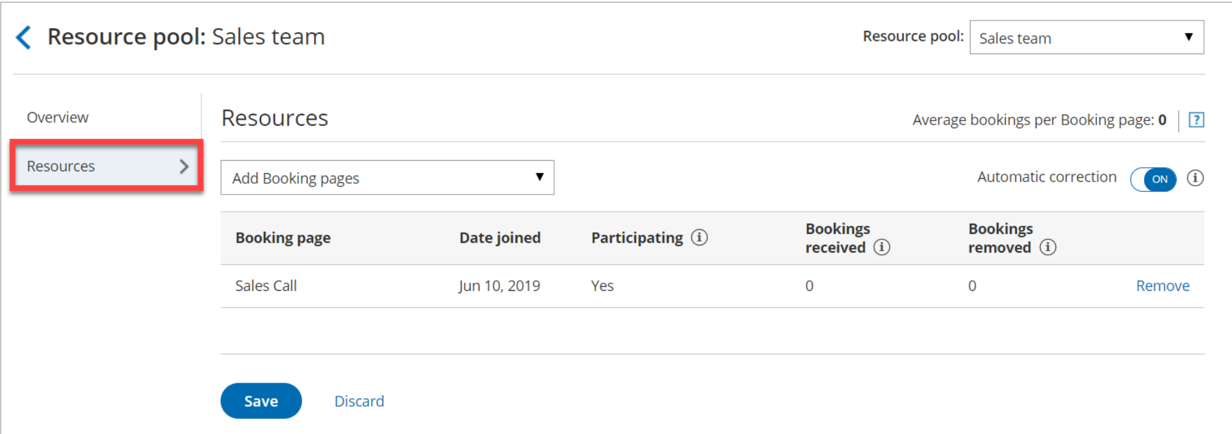


Figure 3: Resource pool Resources section

2. Select the Booking pages you want to add from the drop-down menu.
3. You can add as many Booking pages as you like. All types of Booking pages can be added to the pool, regardless of any existing associations between Booking pages and Event types.

Your Resource pool is ready! To start distributing bookings to your pool members, you need to add it to a Master page using team or panel pages. Once your pool starts receiving bookings, you will have visibility in how many bookings each Team member received and how many were removed.

Note:

If your Resource pool's distribution method is Pooled availability with priority, you will be able to set a priority for each booking page. Bookings will be assigned to the Booking page with the highest priority which is available at the selected time.

Resource pool distribution method: Round robin

Last Modified on Oct 12, 2022

Resource pools allow you to dynamically distribute bookings among a group of Team members in the same department, location, or with any other shared characteristic. Each Resource pool has its own method for distributing bookings, such as Round robin, Pooled availability, or Pooled availability with priority.

In this article, you'll learn about the Round robin distribution method and how to set up a Resource pool with Round robin distribution.

When should I use Round robin?

Round robin is an organization-focused distribution method. You should use Round robin if your top priority is achieving an equal booking distribution among your Team members. For example, you might choose to use Round robin to distribute demos or initial consultations to Account Executives. Each Account Executive will have an equal opportunity to achieve their sales goals.

When you use Round robin assignment, you can ensure that cancellations, reassignments, and no-shows do not affect booking distribution equality. By enabling Automatic correction, any Team member who falls behind will be automatically moved to the front of the line until they have caught up.

How are bookings assigned with Round robin?

To distribute bookings among Team members in your pool using Round robin, you must add the Resource pool to a Master page. When a Customer visits your Master page, they will only see the availability of the next Team member in line to receive a booking.

How do I create a Resource pool that uses Round robin?

1. Go to **Booking pages** in the bar on the left.
2. Select **Resource pools** on the left (Figure 1).

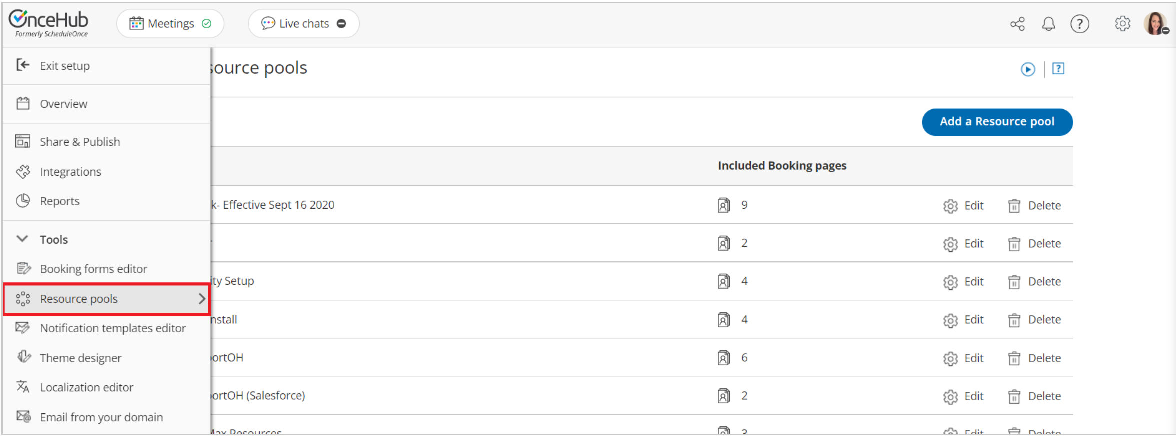


Figure 1: Resource pools in the Tools section

3. Click the **Add a Resource pool** button to create a new Resource pool.
4. The **New Resource pool** pop-up appears (Figure 2).

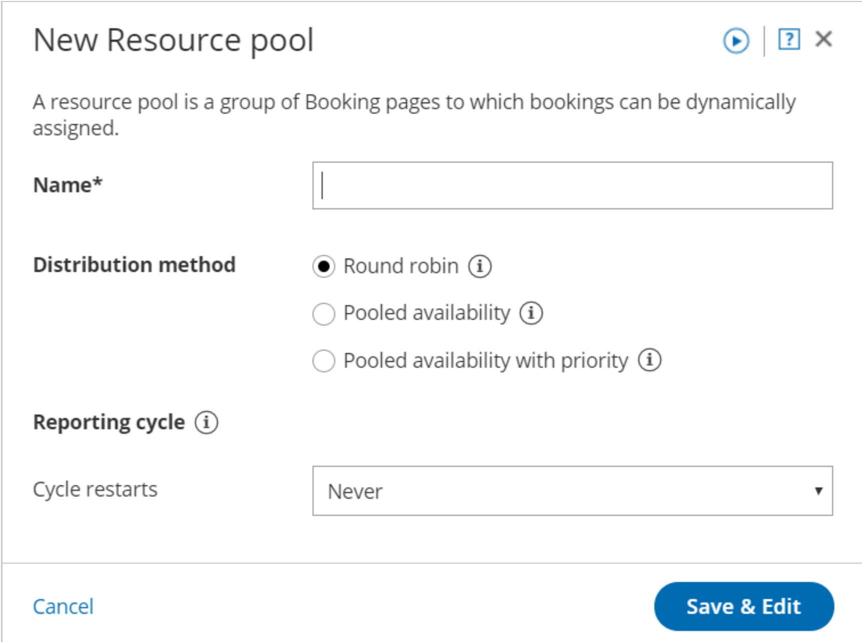


Figure 2: New Resource pool pop-up

5. Name your Resource pool.
6. In the **Distribution method** section, select **Round robin**.
7. Select a Reporting cycle.
8. Click **Save & Edit**. You'll be redirected to the Resource pool Overview section.
9. Navigate to the Resources section and select which Booking pages to include using the drop-down.
10. By default, the Automatic correction toggle will be turned on to ensure that the booking distribution remains equal at all times (Figure 3). If for any reason you don't want removed bookings to be compensated for, you can set this toggle to **OFF**.

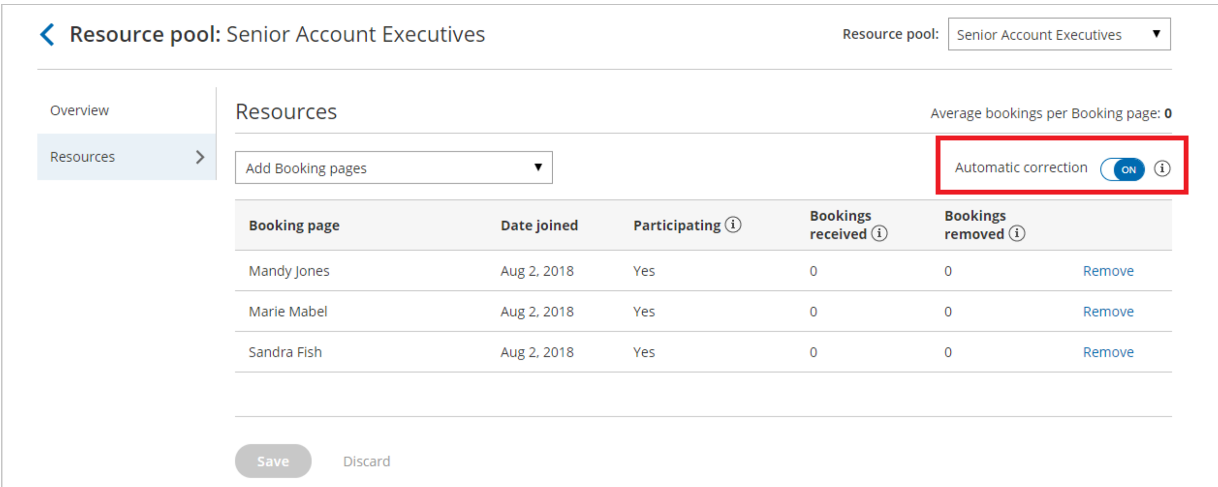


Figure 3: Automatic correction

11. Make sure to add your Resource pool to a Master page. Bookings will not be distributed to pool members until the Resource pool is included in a Master page.

Resource pool distribution method: Pooled availability

Last Modified on Oct 12, 2022

Resource pools allow you to dynamically distribute bookings among a group of Team members in the same department, location, or with any other shared characteristic. Each Resource pool has its own method for distributing bookings, such as Round robin, Pooled availability, or Pooled availability with priority.

In this article, you'll learn about the Pooled availability distribution method and how to set up a Resource pool with Pooled availability.

When should I use Pooled availability?

Pooled availability is a Customer-focused distribution method. You should use Pooled availability if your top priority is providing Customers with the maximum number of time slots. For example, you might choose to use Pooled availability to distribute onboarding or support sessions to your Customer Success team.

How are bookings assigned with Pooled availability?

To distribute bookings among Team members in your pool, you must add the Resource pool to a Master page.

When a Customer visits your Master page, they will see your entire team's combined availability. Once they select a time, the booking is automatically assigned to the available Team member with the longest idle time, meaning the Team member who has not received a booking in the longest time.

How do I create a Resource pool that uses Pooled availability?

1. Go to **Booking pages** in the bar on the left.
2. Select **Resource pools** on the left (Figure 1).

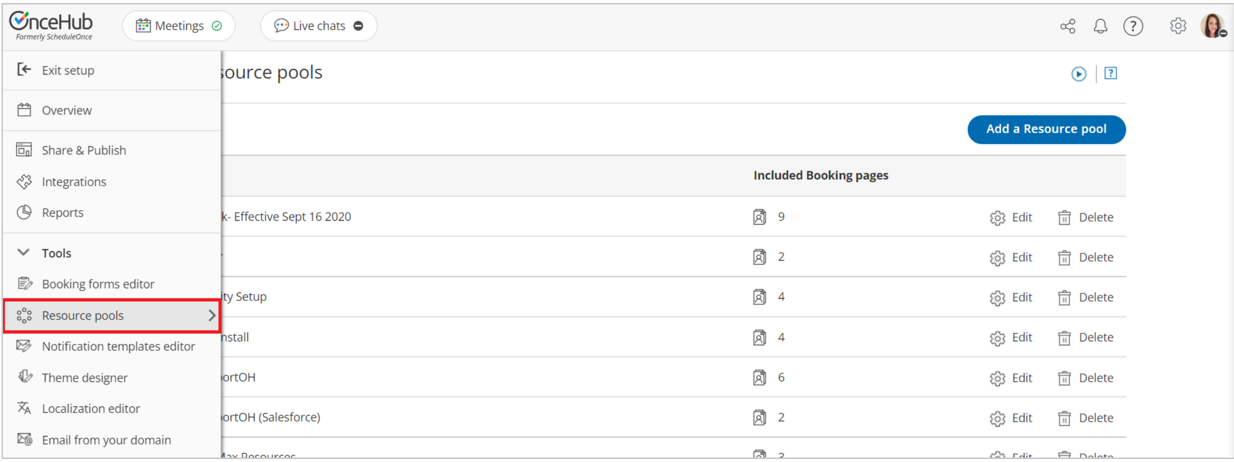


Figure 1: Resource pools

3. Click the **Add a Resource pool** button to create a new Resource pool.
4. The **New Resource pool** pop-up appears (Figure 2).

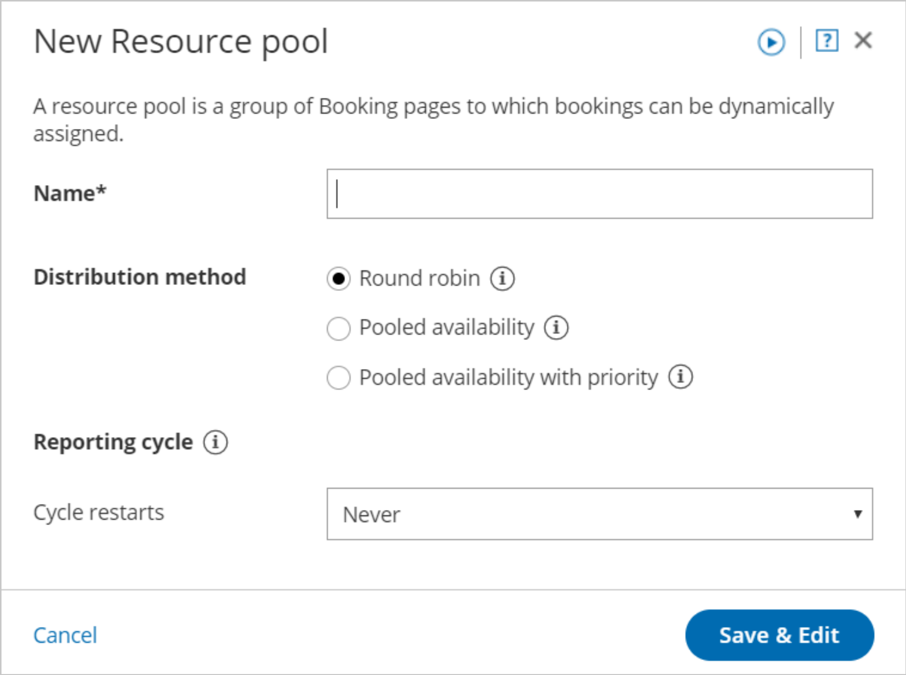


Figure 2: New Resource pool pop-up

5. Name your Resource pool.
6. In the **Distribution method** section, select **Pooled availability**.
7. Select a Reporting cycle.
8. Click **Save & Edit**. You'll be redirected to the Resource pool Overview section.
9. Go to the Resources section and select which Booking pages to include in the drop-down.
10. Make sure to add your Resource pool to a Master page. Bookings will not be distributed to pool members until the Resource pool is included in a Master page.

Resource pool distribution method: Pooled availability with priority

Last Modified on Oct 12, 2022

Resource pools allow you to dynamically distribute bookings among a group of Team members in the same department, location, or with any other shared characteristic. Each Resource pool has its own method for distributing bookings, such as Round robin, Pooled availability, or Pooled availability with priority.

In this article, you'll learn about the Pooled availability with priority distribution method and how to set up a Resource pool with Pooled availability with priority.

When should I use Pooled availability with priority?

Pooled availability with priority is a hybrid distribution method. It provides Customers with the maximum amount of time slots while also giving priority to specific Team members.

For example, you might choose to use Pooled availability with priority to distribute bookings to your tier-two support representatives. You want to provide maximum availability to Customers in need of tier-two support, while also ensuring that your most qualified support representatives conduct the meetings.

How are bookings assigned with Pooled availability with priority?

To distribute bookings among Team members in your pool using Pooled availability with priority, you must add the Resource pool to a Master page. When a Customer visits your Master page, they will see your entire team's combined availability. Once they select a time, the booking is automatically assigned to the available Team member with the highest priority.

If there are multiple Team members with the same priority ranking, the booking is assigned to the Team member with the longest idle time. This is the Team member who has not received a booking for the longest amount of time.

How do I create a Resource pool that uses Pooled availability with priority?

1. Go to **Booking pages** in the bar on the left.
2. Select **Resource pools** on the left (Figure 1).

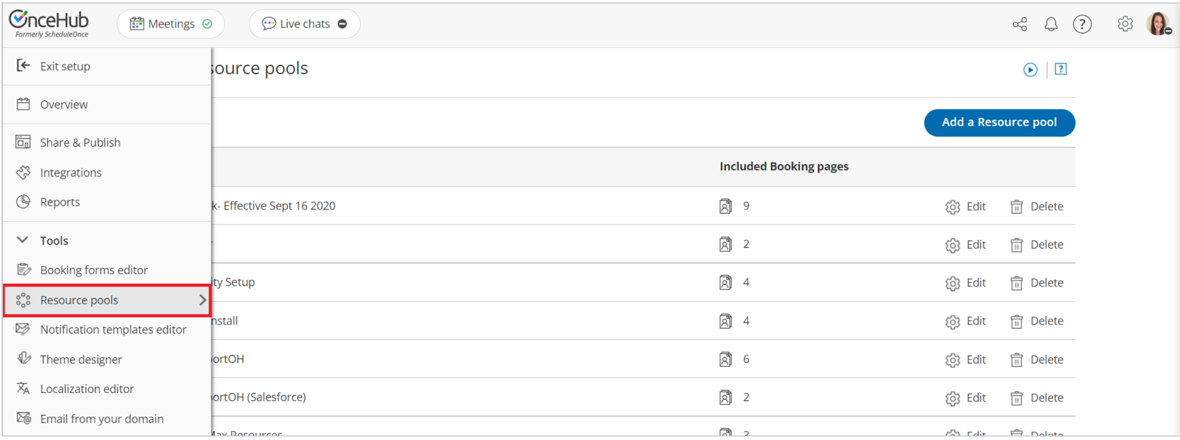


Figure 1: Resource pools

3. Click the **Add a Resource pool** button to create a new Resource pool.
4. The **New Resource pool** pop-up appears (Figure 2).

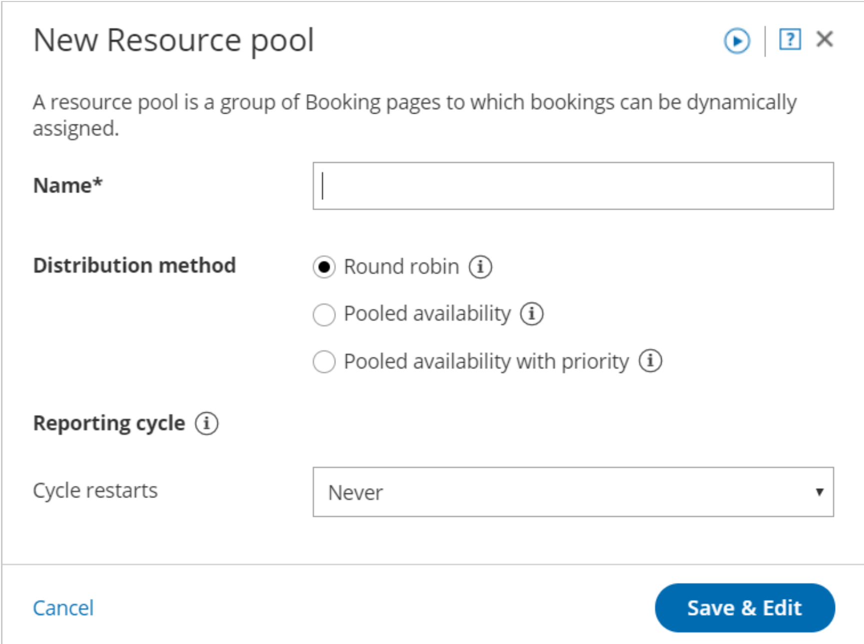


Figure 2: New Resource pool pop-up

5. Name your Resource pool.
6. In the **Distribution method** section, select **Pooled availability with priority**.
7. Select a Reporting cycle.
8. Click **Save & Edit**. You'll be redirected to the Resource pool Overview section.
9. Go to the Resources section and select which Booking pages to include in the drop-down. Assign a priority to each Booking page in your pool (Figure 3).

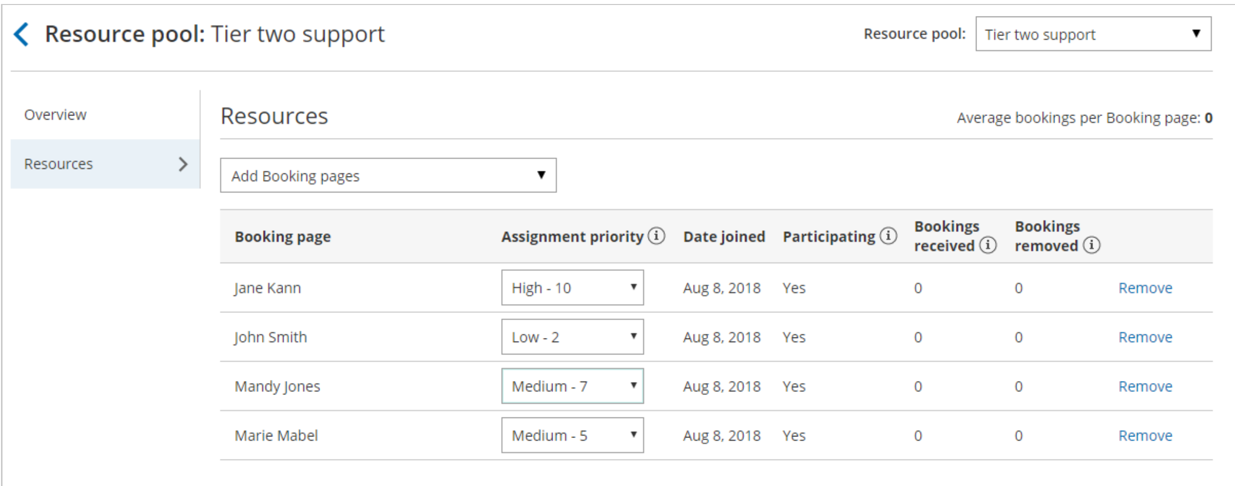


Figure 3: Resource section

10. Make sure to add your Resource pool to a Master page. Bookings will not be distributed to pool members until the Resource pool is included in a Master page.

Resource pools: Reporting cycle

Last Modified on Oct 12, 2022

The Reporting cycle of a Resource pool determines how often the statistics for the pool will be reset. You define the Reporting cycle when you create a new Resource pool.

The reporting cycle can be monthly, quarterly, or go on continuously. Select the reporting cycle you use in your organization to ensure your scheduling stats are fully aligned with your business metrics.

Note:

Once you have defined a Reporting cycle for a new Resource pool, it cannot be changed.

Requirements

To define the Reporting cycle of a new Resource pool, you must be a OnceHub Administrator.

How to set the Reporting cycle for a new Resource pool:

1. Go to **Booking pages** in the bar on the left.
2. Select **Resource pools** on the left (Figure 1).

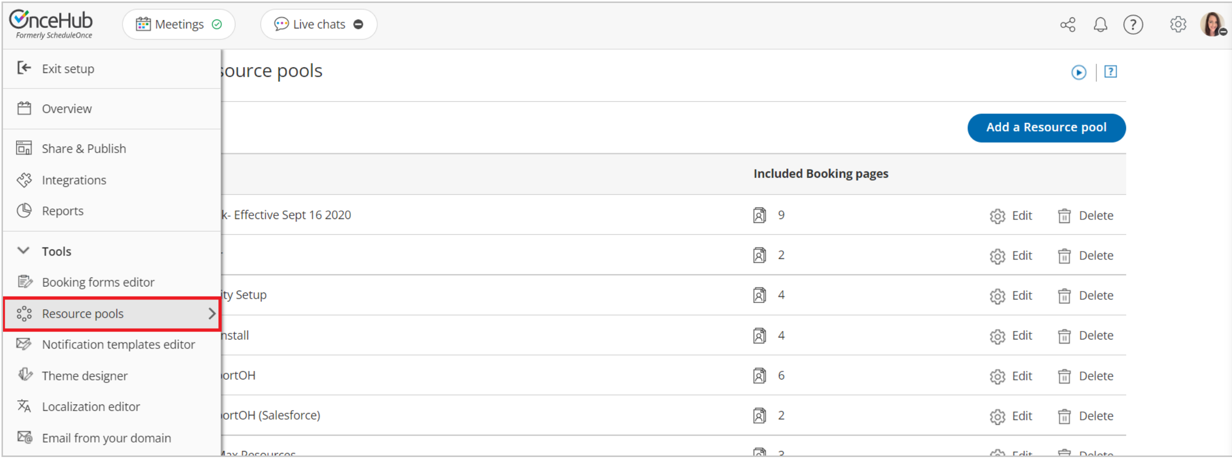


Figure 1: Resource pools

3. Click the **Add a Resource pool** button to create a new Resource pool.
4. The **New Resource pool** pop-up appears (Figure 2).

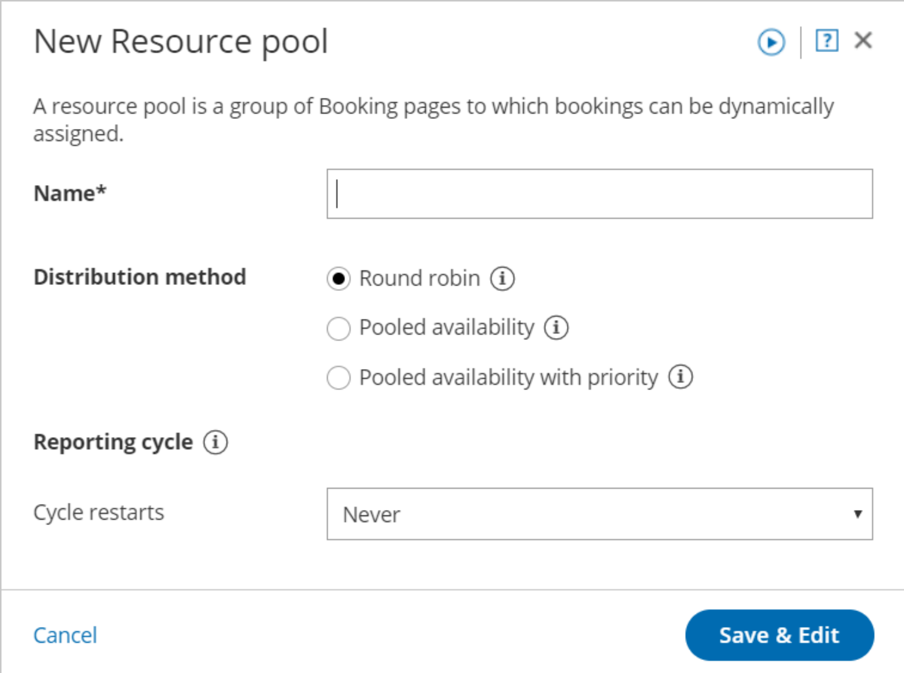


Figure 2: New Resource pool pop-up

5. After defining the Resource pool's **Name** and **Distribution method**, choose the **Reporting cycle** for your Resource pool. If the Reporting cycle of the Resource pool is **Every calendar month** or **Every calendar quarter**, you'll be required to define the time zone that will be used every Reporting cycle to reset the statistics for your pool.
6. Once you have defined the Resource pool's properties, click **Save & Edit**. You will be redirected to the Resource pool Overview section where you will be able to continue the setup.

OnceHub Resource pools: Overview section

Last Modified on Jun 2, 2023

Resource pools allow you to dynamically distribute bookings among a group of Team members in the same department, location, or with any other shared characteristic.

The Resource pool **Overview** section summarizes the main properties of the selected Resource pool and provides real-time visibility into booking metrics of the Resource pool.

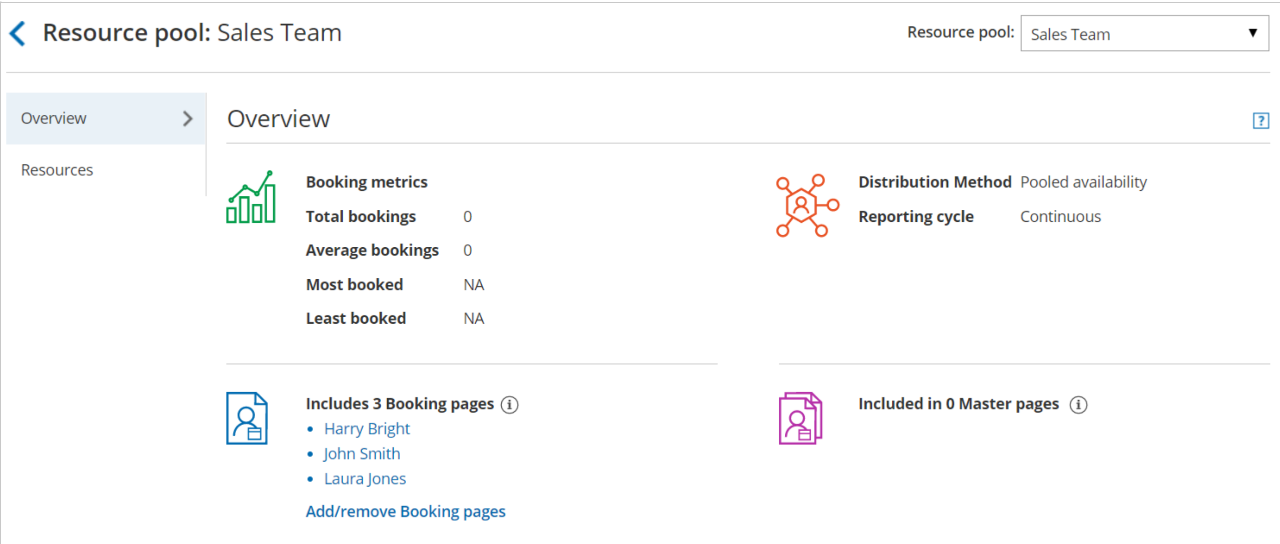


Figure 1: Resource Pool Overview section

Booking metrics

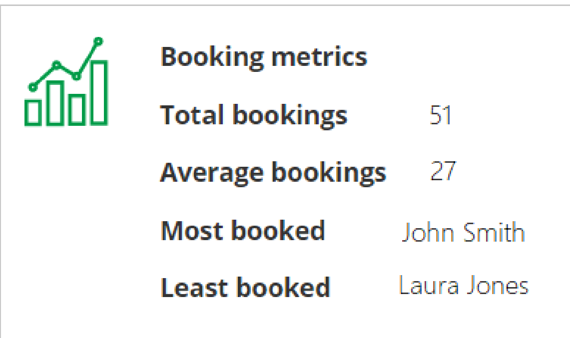


Figure 2: Booking metrics

The **Booking metrics** section (Figure 2) gives you quick access to the pool's statistics. All metrics are real-time and show the state of the pool within the current Reporting cycle.

- **Total bookings:** The total number of bookings that Team members in the Resource pool have received to date, within the Reporting cycle period.
- **Average bookings:** The average number of bookings that each Team member in the Resource pool has received to date, within the existing Reporting cycle.
- **Most booked:** The Team member in the Resource pool who has received the highest number of bookings to date, within the existing Reporting cycle.
- **Least booked:** The Team member in the Resource pool who has received the least number of bookings to date, within the existing Reporting cycle.

Main settings

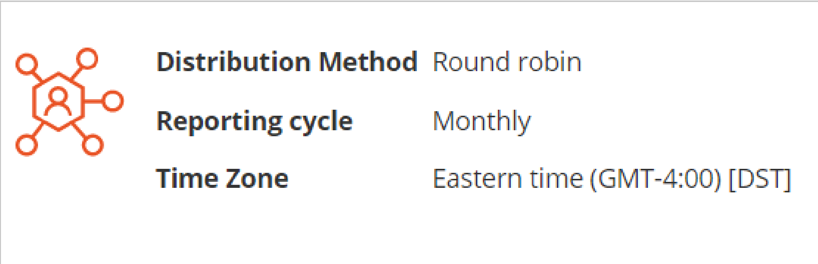


Figure 3: Resource pool main settings

The **Main settings** section (Figure 3) shows the following:

- **Distribution method:** The selected Distribution method is listed here. The Distribution method determines how bookings are assigned across Team members within the Resource pool. Resource pools can use Round robin, Pooled availability, or Pooled availability with priority.
- **Reporting cycle**: The selected Reporting cycle is listed here. The Reporting cycle determines how often the statistics for your Resource pool will be reset.
- **Time zone**: If the Reporting cycle of the Resource pool is set to Monthly or Quarterly, the Time zone that determines when the statistics for your pool are reset is listed here.

Included Booking pages

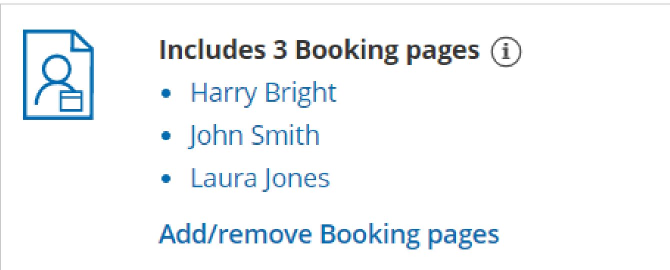


Figure 4: Booking pages included in the Resource pool

Each Resource pool groups Booking pages together according to characteristics you define. Here, you will see a list of all the Booking pages that are included in the specific Resource pool.

Included in Master pages

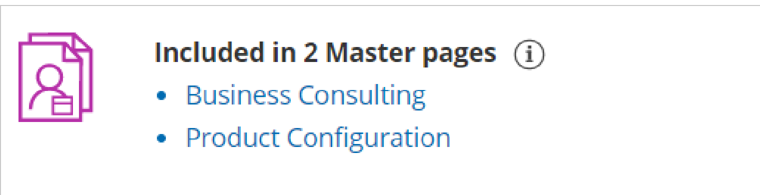


Figure 5: Master pages that the Resource pool is included in

Resource pools are only active once you add them to Master pages using team or panel pages. When Customers schedule on Master pages that include a Resource pool, the booking will be assigned to a pool member according to the Resource pool's Distribution method. A single Resource pool can be included across multiple rules within a single Master page and can be included across multiple Master pages.

Resource pools: Resources section

Last Modified on Oct 12, 2022

Resource pools allow you to dynamically distribute bookings among a group of Team members in the same department, location, or with any other shared characteristic.

The **Resources** section of the Resource pool is where you determine which Team member's Booking pages are included in the pool. These are the Team members that will receive bookings. How bookings are assigned across these Team members is determined by the Resource pool's distribution method.

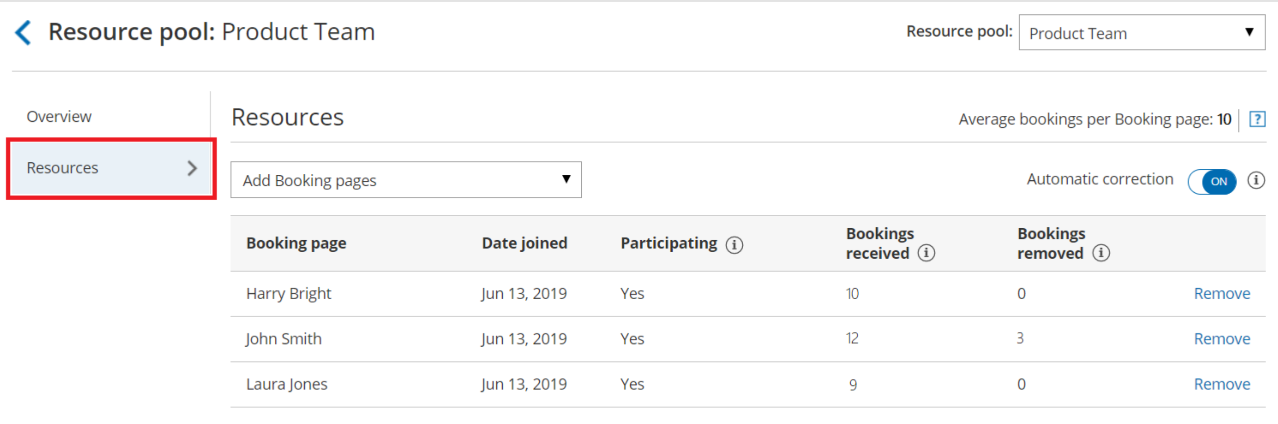


Figure 1: Resource pool Resources section

In this article, you'll learn about using the Resources section.

Requirements

To define the **Resources** section in a Resource pool, you must be a OnceHub Administrator.

Defining Resources in a Resource pool

1. Go to **Booking pages** in the bar on the left.
2. Select **Resource pools** on the left (Figure 1).

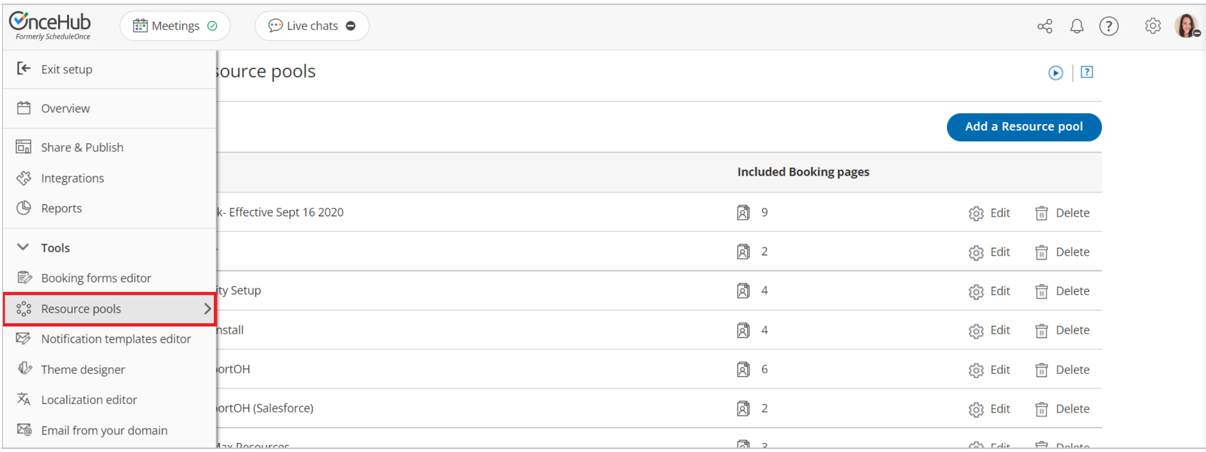


Figure 1: Resource pools

3. Select the Resource pool that you'd like to add Booking pages to.
4. Go to the **Resources** section.
5. Using the **Add Booking pages** drop-down menu, select the Booking pages you would like to be part of this Resource

pool. You can add as many Booking pages as you like. All types of Booking pages can be added to the pool, regardless of any existing associations between Booking pages and Event types .

6. To start distributing bookings to your pool members, you need to add the Resource pool to a Master page using team or panel pages.

Using Assignment priority

If you're using Pooled availability with priority as your distribution method, you can set a priority for each Booking page after you've added them. Bookings will be assigned to the Booking page with the highest priority available at the selected time. Learn more about Pooled availability with priority

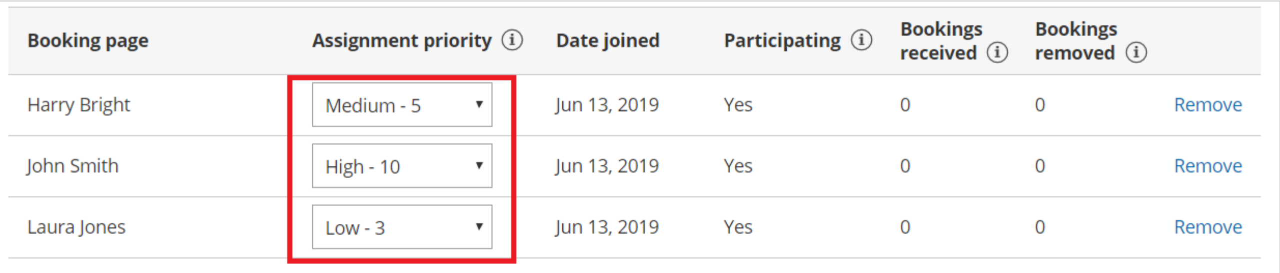


Figure 2: Set the Assignment priority for each Booking page

Using Automatic correction

If you're using Round robin as your distribution method, you can decide whether you would like removed bookings to be compensated for. By default, Automatic correction is toggled **ON** to make sure that any Team member who falls behind due to cancellations is automatically moved to the front of the line until they have caught up. If for any reason you want to turn this off, you can at any time. Learn more about Automatic correction

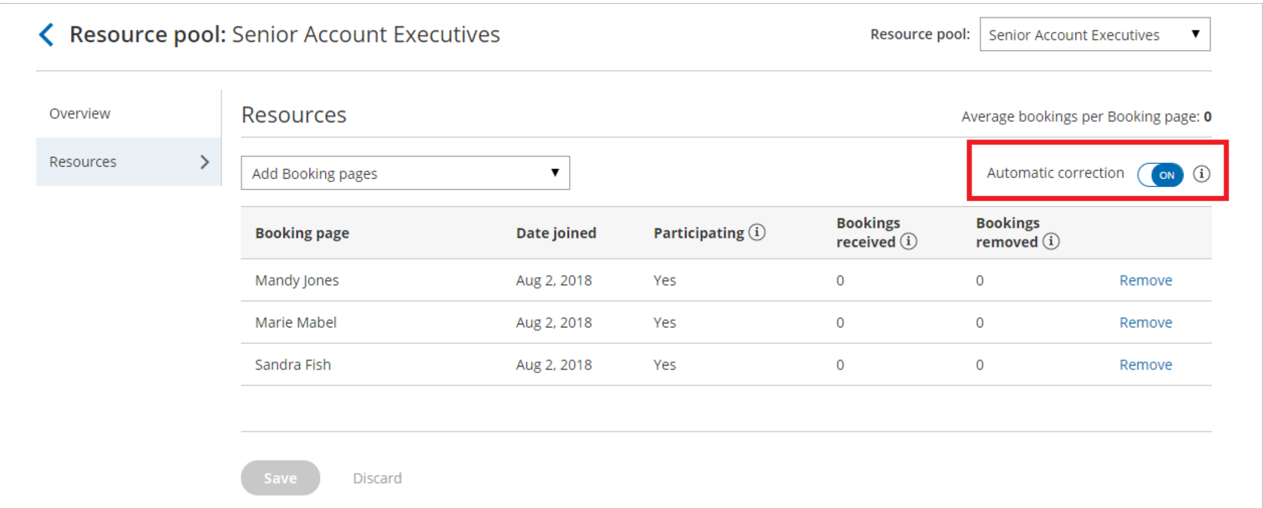


Figure 3: Automatic correction

Adding Resource pools to Master pages

Last Modified on Oct 12, 2022

Resource pools allow you to dynamically distribute bookings among a group of Team members in the same department, location, or with any other shared characteristic. After you've created a Resource pool and added all the relevant Booking pages to it, you'll need to add the Resource pool to a Master page to start distributing bookings to your pool members.

In this article, you'll learn how to add a Resource pool to a Master page.

Requirements

- To create or edit a Master page, you must be a OnceHub Administrator.
- Resource pools can ONLY be added to Master pages using team or panel pages.

Adding Resource pools to Master pages

1. Go to **Booking pages** in the bar on the left.
2. Click the Plus button in the **Master pages** pane to create a new Master page.
3. The **New Master page** pop-up appears (Figure 1).

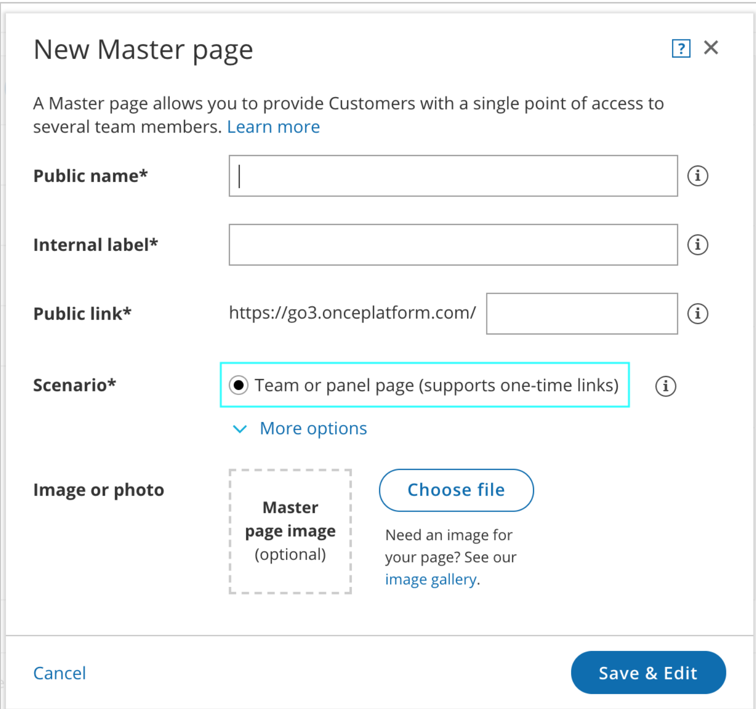


Figure 1: New Master page pop-up

4. After defining the Master page's Public name, Internal label and Public link, select **Team or panel page** as the Scenario.

Tip:

When you use a Master page with team or panel pages, you can also generate one-time links which are good for one booking only, eliminating any chance of unwanted repeat bookings.

A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page. One-time links can be personalized, allowing the Customer to pick a time and schedule without having to fill out the Booking form.

5. Click **Save & Edit**. You'll be redirected to the Master page Overview section to continue editing your settings.
6. Go to the Event types and assignment section of the Master page.
7. Click **Add Event type**.
8. Select which Event types will be offered in your Master page (Figure 3). Master pages with Dynamic rules can only include Event types configured to Automatic booking and Single session. Learn more about conflicting settings when using team and panel pages

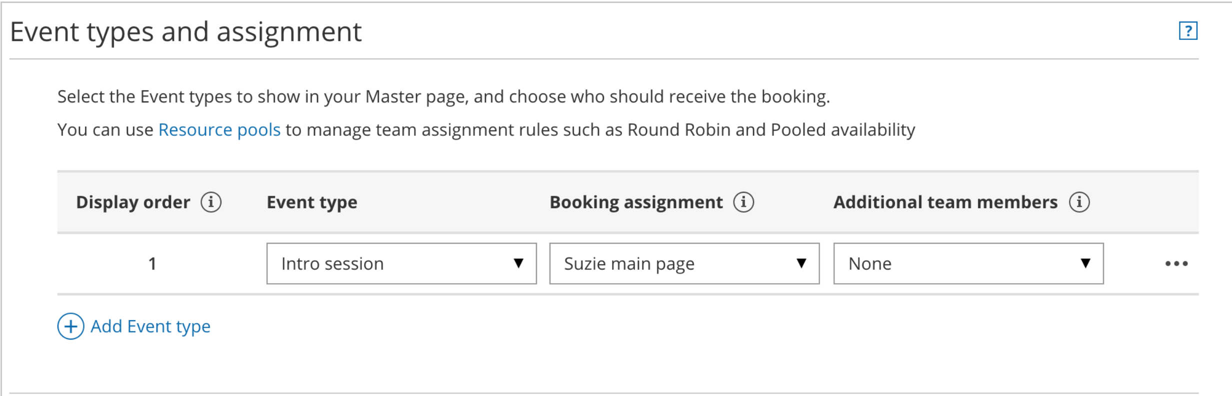


Figure 3: Add Event types and assignment

9. Next, use the Booking assignment drop-down to select which Resource pool should provide that Event type.
10. Finally, if your Event type requires participation from multiple Team members simultaneously, you can create Panel meetings by adding any number of Additional team members. These Team members can be defined by selecting specific Booking pages or by selecting Resource pools.

> **Note:**
>
> The same Resource pool cannot be selected as the Booking assignment and as the Additional team member in a single rule. Learn more about conflicting settings when using team or panel pages

11. You can use the same Resource pool across multiple rules, and you can use multiple Resource pools per rule and across rules. This ultimately allows you to have multiple distribution methods on a single Master page.
12. Reorder the Event types to ensure they appear on your Master page in the order that you want. You can move a row up or down by clicking on the left side of the row and dragging to the position you want (Figure 4).

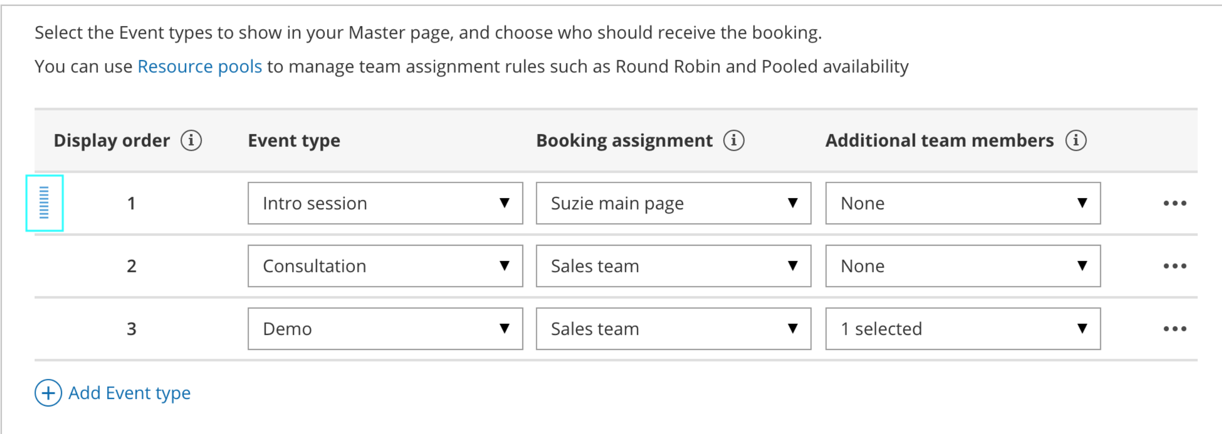


Figure 4: Click and drag a row to reorder

13. Click **Save**.

Your Master page with Resource pools is now ready to go! When a Customer schedules using this Master page, bookings will be assigned to pool members according to the pool's distribution method. Once your pool starts to receive bookings, you'll have real-time visibility of how many bookings each Team member received and how many bookings were removed.

Resource pool statistics: Bookings received

Last Modified on Oct 12, 2022

Resource pools allow you to dynamically distribute bookings among a group of Team members in the same department, location, or with any other shared characteristic.

Bookings received is a metric provided for each Booking page you've included in a Resource pool. **Bookings received** is the number of bookings that a specific Booking page has received to date, within the Reporting cycle.

In this article, you'll learn about viewing and understanding the Bookings received metric.

Requirements

To view the **Bookings received** metric, you must be a OnceHub Administrator.

Viewing the Bookings received metric

1. Go to **Booking pages** in the bar on the left.
2. Select **Resource pools** on the left (Figure 1).

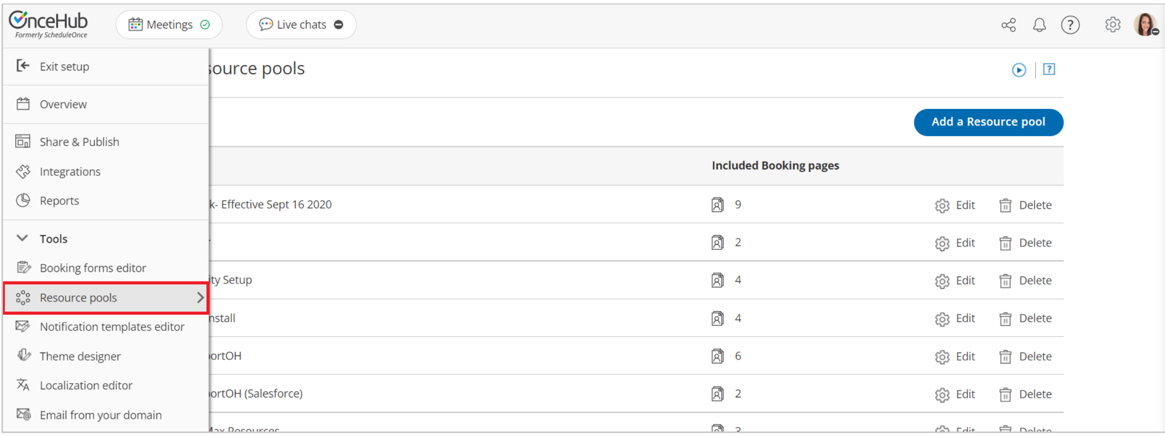


Figure 2: Resource pools

3. Select the specific Resource pool you would like to view **Bookings received** for.
4. Go to the **Resources** section of the Resource pool (Figure 2).

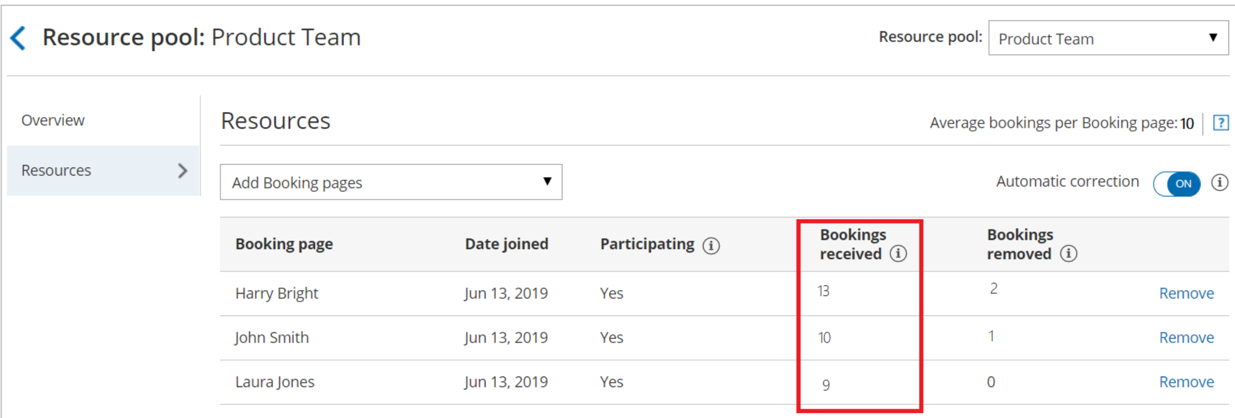


Figure 2: Bookings received

Understanding the Bookings received metric

If the specific Resource pool is included in multiple Master pages, the **Bookings received** metric for each Booking page is the total number of bookings received by that Booking page across all Master pages.

Bookings can be received via direct scheduling, rescheduling, or reassignment.

- **Bookings received via direct scheduling:** This happens when a Customer schedules on a Master page that includes the specific Resource pool, and the booking is assigned to the specific Booking page.
- **Bookings received via rescheduling:** This happens when a Customer reschedules a booking and the booking is assigned to a different Booking page from the original Booking page that was assigned. In this case, the **Bookings received** counter will go up by one for the new Booking page that the Customer rescheduled with. The Bookings removed counter will go up by one for the original Booking page that the booking was rescheduled from.
- **Bookings received via reassignment:** This happens when a User reassigns a booking from one Booking page to another. In this case, the **Bookings received** counter will go up by one for the new Booking page the User reassigned the booking to. The **Bookings removed** counter will go up by one for the original Booking page that the booking was reassigned from.

Resource pool statistics: Bookings removed

Last Modified on Oct 12, 2022

Resource pools allow you to dynamically distribute bookings among a group of Team members in the same department, location, or with any other shared characteristic.

Bookings removed is a metric provided for each Booking page you've included in a Resource pool. **Bookings removed** is the number of bookings that were taken away from a specific Booking page to date, within the existing Reporting cycle.

In this article, you'll learn about viewing and understanding the Bookings removed metric.

Requirements

To view the **Bookings removed** metric, you must be a OnceHub Administrator.

Viewing the Bookings removed metric

1. Go to **Booking pages** in the bar on the left.
2. Select **Resource pools** on the left (Figure 1).

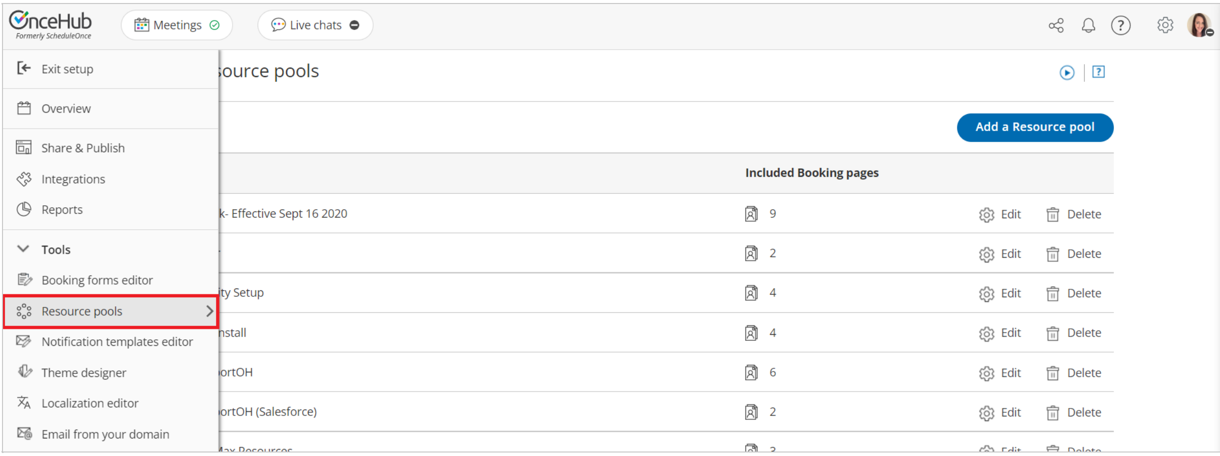


Figure 1: Resource pools

3. Select the specific Resource pool you would like to view **Bookings removed** for.
4. Go to the **Resources** section of the Resource pool (Figure 2).

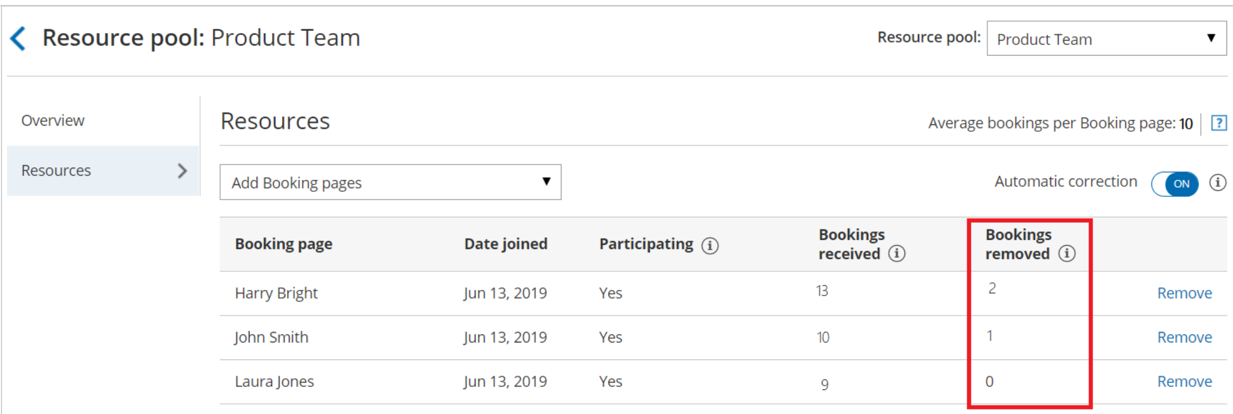


Figure 2: Bookings removed in the Resource pool's Resources section

Understanding the Bookings removed metric

If the specific Resource pool is included in multiple Master pages, the **Bookings removed** metric shown for each Booking page is the total number of bookings taken away from that Booking page across all Master pages.

Bookings can be removed from a Booking page due to cancellations, rescheduling, reassignments, or no-shows.

- **Bookings removed due to cancellations:** This happens when a Customer cancels a booking that was originally scheduled on the Master page that included the specific Resource pool, or when a User cancels a booking or requests the booking to be rescheduled.
- **Bookings removed due to rescheduling:** This happens when a Customer reschedules a booking and the booking is assigned to a different Booking page from the original Booking page that was assigned. In this case, the **Bookings removed** counter will go up by one for the original Booking page that the Customer scheduled with. The Bookings received counter will go up by one for the new Booking page that the Customer rescheduled with.
- **Bookings removed due to reassignment:** This happens when a User reassigns a booking from one Booking page to another. In this case, the **Bookings removed** counter will go up by one for the original Booking page that the booking was reassigned from. The **Bookings received** counter will go up by one for the new Booking page that the User reassigned the booking to.
- **Bookings removed due to no-shows:** This happens when a User marks a booking as a no-show. The booking marked as no-show needs to have been originally scheduled on the Master page that included the specific Resource pool.

Resource pools: Assignment priority

Last Modified on Jun 2, 2023

You can assign an Assignment priority to Booking pages within a Resource pool that uses Pooled availability with priority as the distribution method. The Assignment priority determines which Booking page will receive a booking when multiple Booking pages are available at the time selected by the Customer.

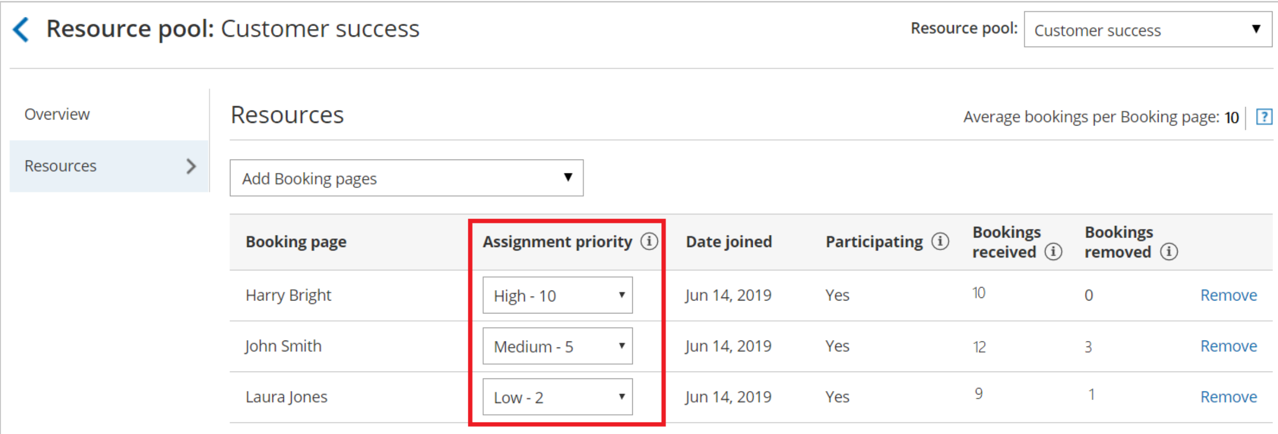


Figure 1: Resource pool Assignment priority

In this article, you'll learn about using Assignment priority.

How Assignment priority works

When a Customer selects a time to schedule a meeting, OnceHub first checks which Booking pages are available. Then, the booking is assigned to the available Booking page with the highest Assignment priority.

If there are multiple Booking pages with the same Assignment priority, the booking is assigned to the Booking page with the longest idle time. This is the Booking page which has not received a booking for the longest amount of time.

Requirements

To edit the Assignment priority of Booking pages in a Resource pool, you must be a OnceHub Administrator.

Defining Assignment priority for Booking pages in a Resource pool

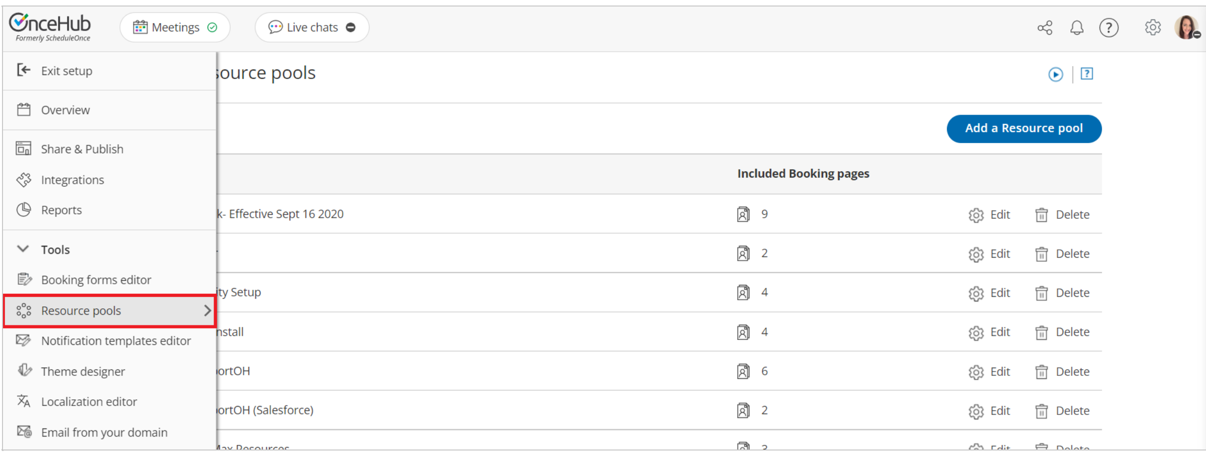
1. Go to **Booking pages** in the bar on the left.
2. Select **Resource pools** on the left (Figure 1).
3. 

Figure 1: Resource pools

4. Select the specific Resource pool you'd like to define **Assignment priority** for.

> **Note:**
>
> Assignment priority is only relevant for Resource pools using Pooled availability with priority as the distribution method.

5. In the **Resources** section, use the **Assignment priority** drop-down menu next to each Booking page to change its priority. By default all pages have an Assignment priority of **Medium - 5**.

Resource pools: Automatic correction

Last Modified on Oct 12, 2022

OnceHub uses a smart Automatic correction distribution algorithm to ensure that Resource pools that use Round robin distribution achieve an equal booking distribution across your Team members at all times.

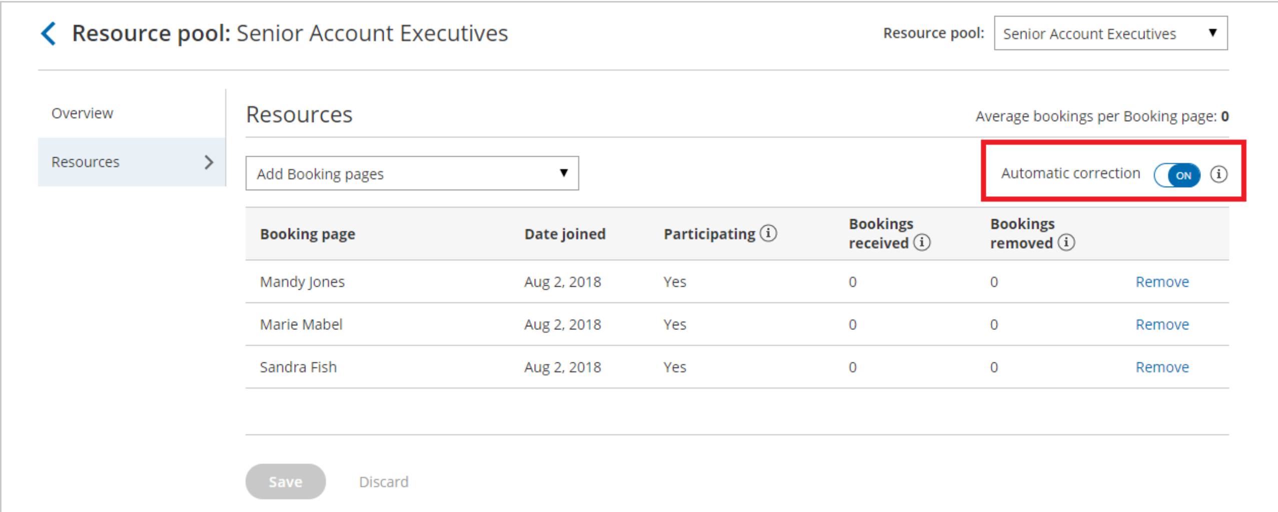


Figure 1: Round robin Resource pool with Automatic correction

In this article, you'll learn about using Automatic correction with your Round robin Resource pool.

Why use Automatic correction?

With Round robin distribution, each new booking is assigned to the next Team member in line. This ensures that the number of bookings received per Booking page is equal. However, if schedule changes such as cancellations by customers are not taken into consideration, the distribution may become uneven.

The Automatic correction algorithm ensure that any bookings that are removed are compensated for, meaning that any Team member who falls behind will be automatically moved to the front of the line until they have caught up.

The Automatic correction distribution algorithm is turned **ON** by default for all new Resource pools that use Round robin distribution. If for any reason you would like to stop compensating for bookings that were removed, follow the steps below to turn Automatic correction off.

Requirements

To edit a Resource pool, you must be a OnceHub Administrator.

Using the Automatic correction algorithm in a Resource pool

1. Go to **Booking pages** in the bar on the left.
2. Select **Resource pools** on the left (Figure 2).

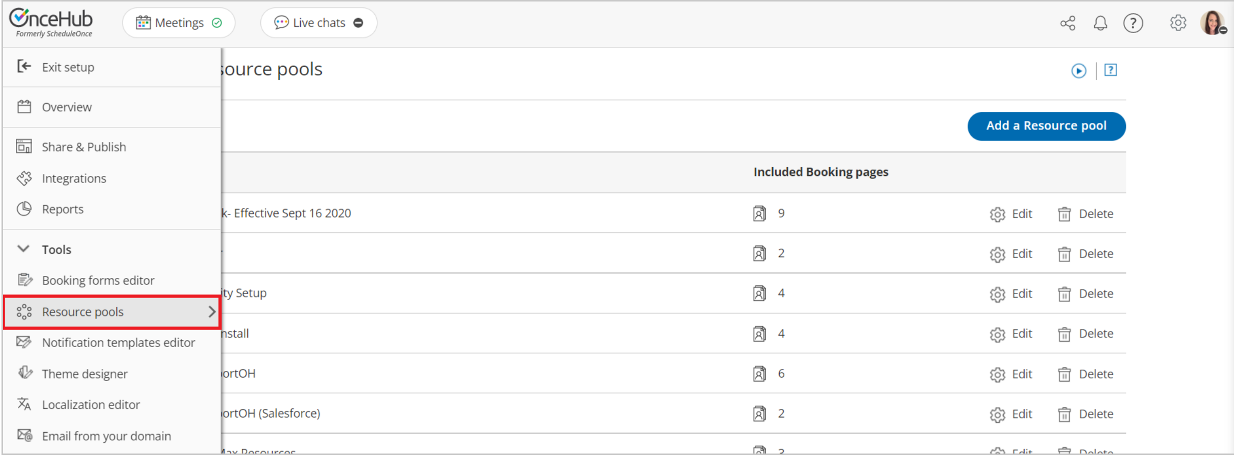


Figure 2: Resource pools

3. Select the specific Resource pool you would like to turn Automatic correction off for.

Note:

The Automatic correction algorithm is only available for Resource pools using Round robin as the distribution method.

4. Once you select the relevant Resource pool, you'll be redirected to the Resource pool Overview section.
5. Go to the **Resources** section of the Resource pool.
6. Set the **Automatic correction** toggle to **OFF** (Figure 3). From this point onwards, bookings that are removed will not be compensated for.

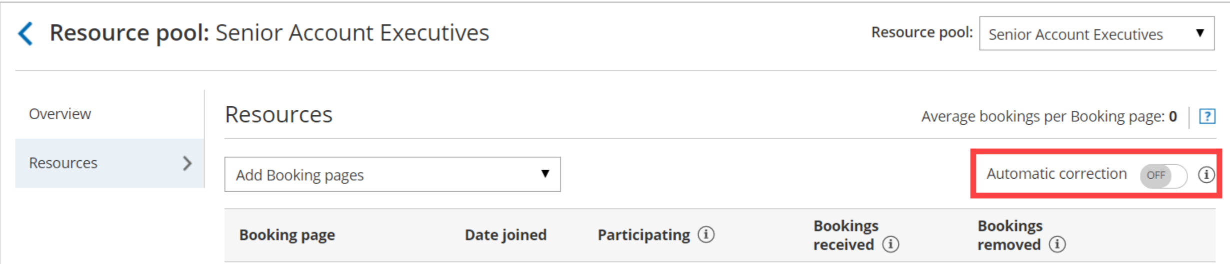


Figure 3: Set Automatic correction to OFF

Introduction to Pooled availability

Last Modified on Oct 15, 2024

Pooled availability combines the availability of multiple Team members and displays this to Customers as a single booking calendar. When Customers select a time, the booking is automatically assigned to a Team member.

Pooled availability is a Customer-focused distribution method that you should use if your top priority is providing Customers with the maximum number of time slots. Pooled availability can be used in multi-user scenarios, single-user scenarios, and in resource and location scheduling. You can set up Pooled availability in a Master page using a Resource pool.

OnceHub offers two types of Pooled availability.

Standard Pooled availability

This distribution method provides Customers with the maximum amount of time slots while assuming that all Team members are equally qualified to receive the booking.

With Pooled availability, booking assignment is based on the longest idle time concept. When a Customer selects a time on your Master page, OnceHub first checks which Booking pages are available at the time selected by the Customer. Then, the booking is assigned to the Booking page with the longest idle time, meaning the Booking page that has not received a booking for the longest amount of time.

Learn more about Pooled availability

Pooled availability with priority

This is a hybrid distribution method which provides Customers with the maximum amount of time slots while also giving priority to specific Team members.

With Pooled availability with priority, booking assignment is based on Team members' Assignment priority. When a Customer selects a time on your Master page, OnceHub first checks which Booking pages are available at the time selected by the Customer. Then, out of the available Booking pages, the booking is assigned to the Booking page with the highest priority.

If there are multiple Booking pages with the same Assignment priority, the booking is assigned to the Booking page with the longest idle time. This is the Booking page which has not received a booking for the longest amount of time.

Learn more about Pooled availability with priority

Distribution method: Pooled availability

Last Modified on Oct 12, 2022

Pooled availability combines the availability of multiple Team members and displays this to Customers as a single booking calendar. When a Customer selects a time, the booking is automatically assigned to the Team member with the longest idle time, meaning the Team member who has not received a booking in the longest time.

Pooled availability is a Customer-focused distribution method that should be used if your top priority is providing Customers with the maximum number of time slots. Pooled availability can be used in multi-user scenarios, single-user scenarios, resource scheduling, and location scheduling. You can set up Pooled availability in a Rule-based assignment Master page using Static rules .

See a live demo

How are bookings assigned with Pooled availability?

When a Customer selects a time on your Master page, OnceHub first checks which Team members are available at the time selected by the Customer. Then, the booking is assigned to the Team member with the longest idle time.

Using Pooled availability in Master pages with Static rules

1. Create a Booking page for each member, resource, or any other entity that you would like to automatically assign. Don't configure any Booking page settings yet.
2. To use Pooled availability, you must use at least one Event type. You can use multiple Event types to represent different types of meetings, or a single Event type if you provide only one type of meeting type.
   If you use only one Event type, the system will automatically select it for the Customer.

   > **Note:**
   >
   > All Event types used in Pooled availability must use Automatic booking mode. Pooled availability is not possible in Booking with approval mode.

3. Associate your Event types with your Booking pages in the **Event types** section of the Booking page (Figure 1). If you've created just one Event type, all the Booking pages that are used with Pooled availability should be linked to this Event type.

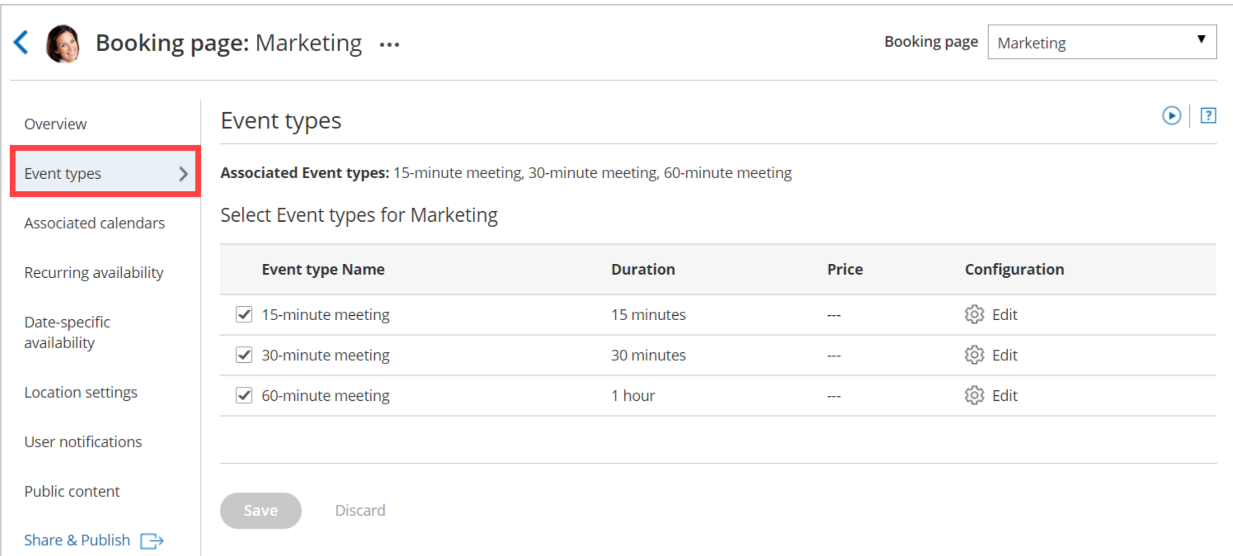


Figure 1: Event types section

4. You can now configure the rest of the settings on the Booking pages and the Event types.

> **Note:**
>
> If you have Booking pages with different time zones, the **Time zone conversion** setting for displaying time slots in your Customer's local time must be enabled in the Time slots section.

5. Go back to **Booking pages** and create a new Master page.
6. Select Rule-based assignment as the Master page scenario.
7. In your newly created Master page, go to the **Assignment** section and follow these steps:
   - In the **Rule types** section, select **Static**.
   - In the **Distribution method** section, select **Pooled availability**.
   - Finally, in the **Included Booking pages** section, select the Booking pages whose availability you would like to combine into one single booking calendar. You can add or remove Booking pages from here at any time.
8. Next, go to the Labels and instructions section and define the Public labels that your Customers will see. Here, you can also define selection instructions for your Customers.

You're all set! You can test the page by clicking the Customer link in the **Share & Publish** section of the the Master page's Overview section.

> **Note:**
>
> You can also use Pooled availability with Resource pools. Learn more about Resource pools with Pooled availability distribution

Distribution method: Pooled availability with priority

Last Modified on Jun 2, 2023

Pooled availability with priority combines the availability of multiple Team members and displays it to Customers as a single booking calendar. When a Customer selects a time, the booking is automatically assigned to the Team member with the highest Assignment priority.

Pooled availability with priority is a hybrid distribution method which provides Customers with the maximum number of time slots while also giving priority to specific Team members. You can set up Pooled availability with priority in a Rule-based assignment Master page using Static rules.

How are bookings assigned with Pooled availability with priority?

When a Customer selects a time on your Master page, OnceHub first checks which Team members are available at the time selected by the Customer. Then, out of the available Booking pages, the booking is assigned to the Team member with the highest Assignment priority.

If there are multiple Team members with the same priority ranking, the booking is assigned to the Team member with the longest idle time. This is the Team member who has not received a booking for the longest amount of time.

Using Pooled availability with priority with Static rules:

1. Create a Booking page for each member, resource, or any other entity that you would like to automatically assign. Don't configure any Booking page settings yet.
2. To use Pooled availability with priority, you must use at least one Event type. You can use multiple Event types or a single Event type if you only have one meeting type. If you use one Event type, it will be automatically selected for your Customers.

   > **Note :**
   >
   > All Event types used in Pooled availability with priority must use Automatic booking mode. Pooled availability with priority is not possible in Booking with approval mode.

3. Associate your Event types with your Booking pages in the **Event types** section of the Booking page (Figure 1). If you've created just one Event type, all the Booking pages that are used with Pooled availability with priority should be linked to this Event type.

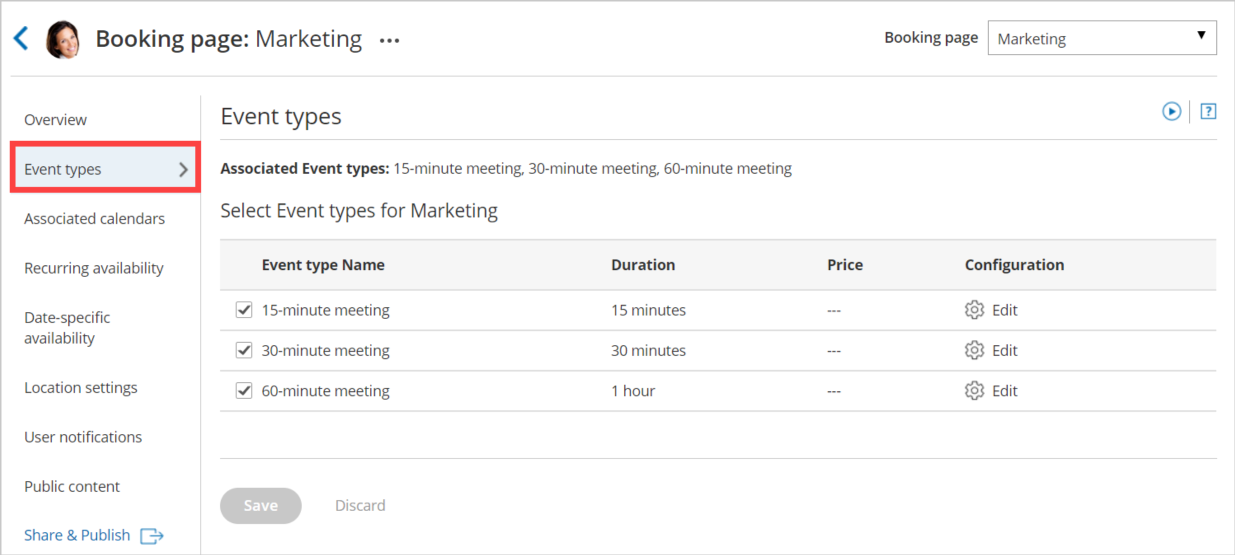


Figure 1: Event types section

4. You can now configure the rest of the settings on the Booking pages and the Event types.

> **Note:**
>
> If you have Booking pages with different time zones, the **Time zone conversion** setting for displaying time slots in your Customer's local time must be enabled in the Time slots section.

5. Go back to **OnceHub setup** and create a new Master page.
6. Select Rule-based assignment as the Master page scenario.
7. In your newly created Master page go to the **Assignment** section and follow these steps:

- In the **Rule types** section, select **Static**.
- In the **Distribution method** section, select **Pooled availability with priority**.
- Finally, in the **Included Booking pages** section, select the Booking pages whose availability you would like to combine into one single booking calendar.

8. Each Booking page you include has an **Assignment priority** that you can set (Figure 2). By default, this is set to **Medium - 5**. To assign specific Team members a higher or lower priority, use the drop-down menu to select a priority from **Low - 1** (lowest) to **High - 10** (highest).

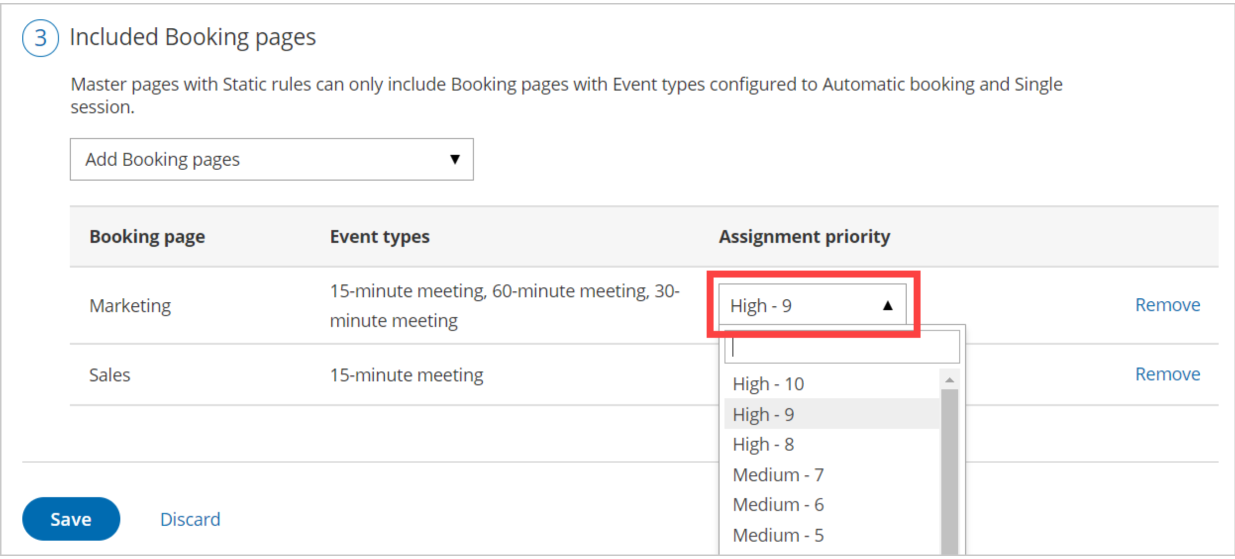


Figure 2: Assignment priority drop-down menu

9. Next, go to the Labels and instructions section and define the Public labels that your Customers will see. Here, you can also define selection instructions for your Customers.

You're all set! You can test the page by clicking the Customer link in the **Share & Publish** section of the the Master page's Overview section.

Note:

You can also use Pooled availability with priority with Resource pools. Learn more about Resource pools with Pooled availability with priority distribution

The Pooled availability algorithm: Longest idle time

Last Modified on Jun 2, 2023

OnceHub's Pooled availability algorithm is based on the longest idle time concept. This refers to the amount of time that has passed since a booking was last created for each Booking page.

Note:

The meeting time does not have an effect on the longest idle time.

How the Pooled availability algorithm works

The Pooled availability algorithm assigns the next booking to the Booking page with the longest idle time. This is the Booking page for which the the longest time has passed since a booking was last made. If there are a number of Booking pages with the same idle time, then the algorithm picks one at random.

Rules

- The idle time is tracked per Master page AND per Event type combination. This means that if a User receives bookings from more than one Master page, each Master page will have separate idle times. Also, if a User receives bookings from more than one Event type in a single Master page, they will have two separate counts.
- The idle time is not considered if a Booking page has been deleted, disabled, or has connection errors.
- When a new Booking page is added to a Master page, this Booking page is considered to have the longest idle time. This means that the new Booking page will be highest priority for new bookings.

Note:

If you're using Pooled availability with priority and multiple Booking pages have been assigned the same Assignment priority, then longest idle time will be used to choose between them.

Introduction to Panel meetings

Last Modified on Jun 2, 2023

OnceHub allows you to create Panel meetings that enable Customers to book a time to meet with multiple Team members simultaneously. You can create panels with specific Team members, or dynamic panels that use Resource pools to assign the relevant Team member. When a Customer visits your Master page, they will see availability based on the specific panel combination.

To create a Panel meeting, use a Master page with team and panel pages.

When to use Panel meetings

Panel meetings are useful for many different scheduling scenarios. Here are some examples:

- During a sales cycle, a technology company may want to allow Customers to meet with a Sales Development Representative and an Account Executive simultaneously.
- Consulting firms may want to allow Customers to schedule a meeting with multiple subject matter experts.
- Universities conducting graduate admissions interviews may also use Panel meetings to allow applicants to schedule an interview with multiple faculty members and professors.

Configuring your Panel meetings

When you create a Panel meeting, you can either include specific Booking pages or Resource pools. When you use Resource pools, OnceHub will automatically assign bookings to Team members in your Resource pool according to the distribution method you choose. You can choose from Round robin, Pooled availability, or Pooled availability with priority.

For example, let's say you are a consulting firm that allows Customers to schedule a meeting with multiple subject matter experts. Your meeting must include a specific consultant who has been directly working with your Customer. The meeting must also include a consultant who specializes in marketing strategy, and another consultant specializing in cost reduction.

For this meeting, your Booking owner would be the specific consultant who has been working directly with the Customer. Your Additional team members would include two Resource pools: one pool with all consultants specializing in marketing strategy, and a second pool with all consultants specializing in cost reduction.

When your Customer schedules their meeting, one consultant from each Resource pool will be automatically assigned, according to the respective Resource pool's distribution method.

Panel meeting notifications

With Panel meetings, the Customer and all panelists are updated throughout the booking lifecycle. When the meeting is scheduled, everyone is notified, a calendar event is created, and a single shared activity is added to each Team member's Activity stream, with the Booking owner and Additional team members listed.

Any Team member who sees the Panel meeting in their Activity stream can cancel the booking or request the Customer to reschedule. If the Customer reschedules or cancels the meeting, the calendar event is updated and notifications are sent accordingly.

Creating Panel meetings

Last Modified on Oct 12, 2022

Panel meetings allow your Customers to book a time to meet with multiple team members simultaneously. When a Customer visits your Master page, they will see availability based on the specific panel combination. You can create panels with specific team members, or dynamic panels that use Resource pools to assign the relevant team member.

In this article, you'll learn how to create a Panel meeting.

Requirements

To create a Panel meeting, you must be a OnceHub Administrator.

Creating a Panel meeting

1. Go to **Booking pages** in the bar on the left and click the plus button in the **Master pages** pane.
2. The **New Master page** pop-up appears (Figure 1).

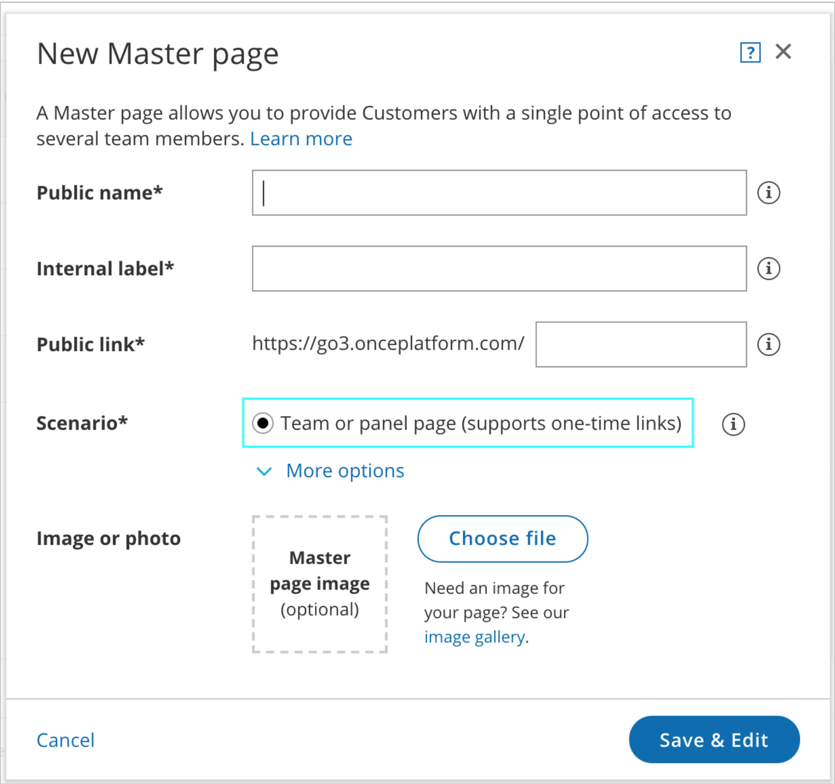


Figure 1: New Master page pop-up

3. Select Team or panel page as the Master page scenario.
4. Populate the pop-up with a **Public name**, **Internal label**, **Public link** and an image if you choose. Then, click **Save & Edit**. You'll be redirected to the Master page Overview section to continue editing your settings.
5. Go to the Event types and assignment section of the Master page.

Tip:

When you use a Master page with a team or panel page, you can also generate one-time links which are good for one booking only, eliminating any chance of unwanted repeat bookings.

A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page. One-time links can be personalized, allowing the Customer to pick a time and schedule without having to fill out the Booking form.

6. Click **Add Event type** (Figure 3).

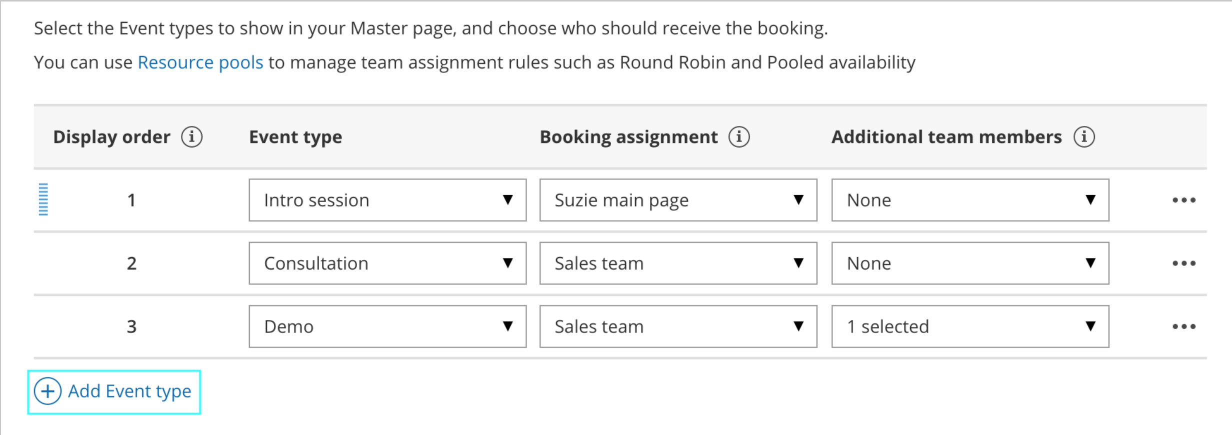


Figure 3: Event-based rules step

7. Use the **Event types** drop-down to select which Event types will be offered on your Master page.
   - Master pages with team or panel pages can only include Event types configured to Automatic booking and Single session. Learn more about conflicting settings when using team or panel pages
8. Use the Booking assignment drop-down to choose a Booking page or Resource pool.
   - The Booking assignment determines who owns the calendar event and the settings of the meeting, including the location, the Booking form, the post-scheduling flow, notifications and third-party integrations.
   - If you select a Resource pool as your Booking assignment, bookings will be assigned to Team members according to the pool's distribution method.
   - You can only select one Booking assignment.
9. Use the Additional team members drop-down to select additional Booking pages and/or Resource pools to participate in the meeting.
   - Additional team members are added as guests/attendees to the Booking owner's calendar event and are CC'd on all notifications sent to the Booking owner assigned.
   - You can select an unlimited number of Additional team members.
10. Click **Save.**
11. Next, go to the Labels and instructions section and define the Public labels that your Customers will see. Here, you can also define selection instructions for your Customers. You should define what a Panel member represents, such as a consultant, interviewer, advisor, or Team member.
12. Move on to the Public content section and define the information that Customers will see when they visit your Master page.

You're all set! When Customers visit your Master page, they will be able to book a time to meet with multiple team members simultaneously. You can test the page by clicking the Customer link in the **Share & Publish** section of the the Master page's Overview section.

Note:

Any Booking page can be selected to participate in your Panel meeting, regardless of any existing associations between Booking pages and Event types.

Booking owners

Last Modified on Jun 2, 2023

Each Dynamic rule you create in a Rule-based assignment Master page must have a Booking owner. The Booking owner is the member who receives the booking.

You can define a Booking owner either by specifying a Booking page or by specifying a Resource pool. If you choose a Resource pool as the Booking owner, bookings will be assigned to a Booking page within the Resource pool according to the pool's distribution method. You can choose from Round robin, Pooled availability, or Pooled availability with priority.

If your Dynamic rule also includes Additional team members, the meeting then becomes a Panel meeting. In the case of a Panel meeting, the Booking owner owns the calendar event and determines settings including the location, the booking form, the post-scheduling flow, notifications, and third-party integrations.

Requirements

To create a Master page and add a Booking owner, you must be a OnceHub Administrator.

How to select a Booking owner

1. Click **Setup -> Booking Page setup** in the top navigation bar.
2. Click the Plus button in the **Master pages** pane.
3. In the Scenario field of the **New Master page** pop-up, select the Rule-based assignment scenario (Figure 1).

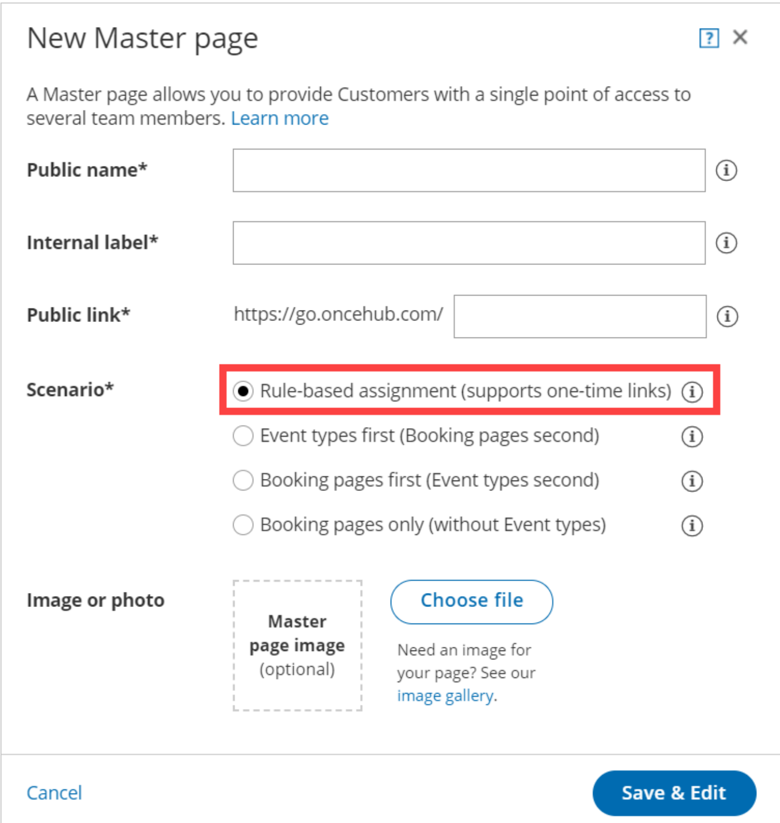


Figure 1: New Master page pop-up

4. Populate the pop-up with a **Public name**, **Internal label**, **Public link** and an image if you choose. Then, click **Save & Edit**. You'll be redirected to the Master page Overview section to continue editing your settings.
5. Go to the Assignment section of the Master page.
6. In the **Rule types** section, select **Dynamic** (Figure 2).

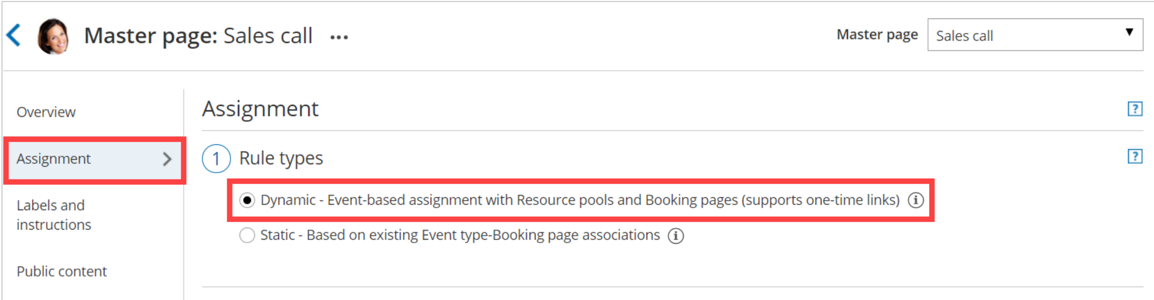


Figure 2: Select Dynamic as the Rule type

Tip :

When you use a Master page using Rule-based assignment with Dynamic rules, you can also generate one-time links which are good for one booking only, eliminating any chance of unwanted repeat bookings.

A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page. One-time links can be personalized, allowing the Customer to pick a time and schedule without having to fill out the Booking form.

7. In the **Event-based rules** section, click **Add rule**.
8. Select which Event types will be offered in your Master page (Figure 3). For each Event type you want to add, you'll need to add a new rule. Master pages with Dynamic rules can only include Event types configured to Automatic booking and Single session. Learn more about conflicting settings when using Dynamic rules

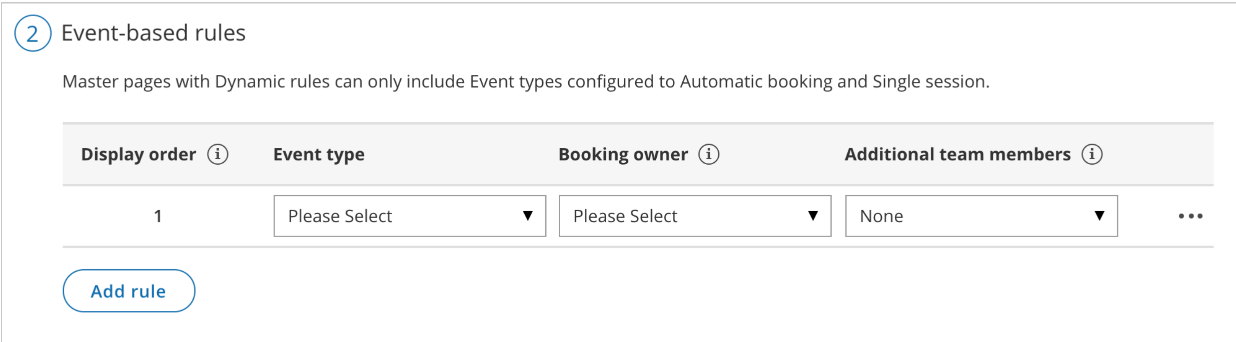


Figure 3: Add an event-based rule

9. Under **Booking owner**, choose a Booking page or Resource pool from the dropdown. You can only select one Booking owner.
10. Click **Save**.

You're all set! The Event type in your Master page now has a Booking owner. If your Master page includes multiple Event types, you can select a different Booking owner for each one. You can also add Additional team members if required.

Note:

The existing associations between Booking pages and Event types do not affect choosing a Booking owner. Any Booking page can be selected as a Booking owner to provide any Event type.

Additional team members

Last Modified on Jun 2, 2023

Additional team members are members of your organization who participate in Panel meetings. Panel meetings allow you to offer meetings where Customers can meet with multiple members of your organization simultaneously.

Panel meetings have a Booking owner, who is the Booking assignment team member, and Additional team members who participate as panelists in the meeting. Panel meetings can be set up in Master pages using a team or panel page.

When you create a Panel meeting, you can include any number of Additional team members. Additional team members can be a specific Booking page or a Resource pool. If you choose Resource pools, a Team member from each pool will be assigned according to the pool's distribution method. You can choose from Round robin, Pooled availability, or Pooled availability with priority.

When Customers visit your Master page, they will only see availability for possible panel combinations. This means that they will only see time slots when all panelists are available, whether the panelists are specific Booking pages or a relevant member of a Resource pool.

How are Additional team members added to a booking?

If the Booking owner has a calendar connected to OnceHub, Additional team members are added as guests/attendees to the Booking owner's calendar event.

If the Booking owner is not connected to a calendar and the Additional team members are, OnceHub will create a 'dummy' event in the Additional team members' calendars to ensure that they don't get double booked.

Note :

Changes to the "dummy" event in the Additional team members' calendars will not affect the scheduled booking.

How are the Additional team members updated throughout the booking lifecycle?

The Panel meeting is added as a single shared activity to each Additional team member's Activity stream, with the Booking owner and Additional team members listed. This means that if there are status changes, they will be updated.

Additional team members are also cc'd on all notifications sent to the Booking owner, including the initial confirmation, reminders, and updates about schedule changes. This ensures that all Panel members have the meeting details and are updated throughout the booking lifecycle.

Can Additional team members perform the same actions as the Booking owner?

Yes. Any User who can see a Panel meeting activity in their Activity stream can cancel it or request to reschedule. If a User cancels or requests to reschedule, all Panelists will be affected.

Requirements

To create a Master page and add Additional team members, you must be a OnceHub Administrator.

How to add Additional team members to meetings

1. Click **Setup -> Booking Page setup** in the top navigation bar.
2. Click the Plus button in the **Master pages** pane.
3. The **New Master page** pop-up appears (Figure 1).

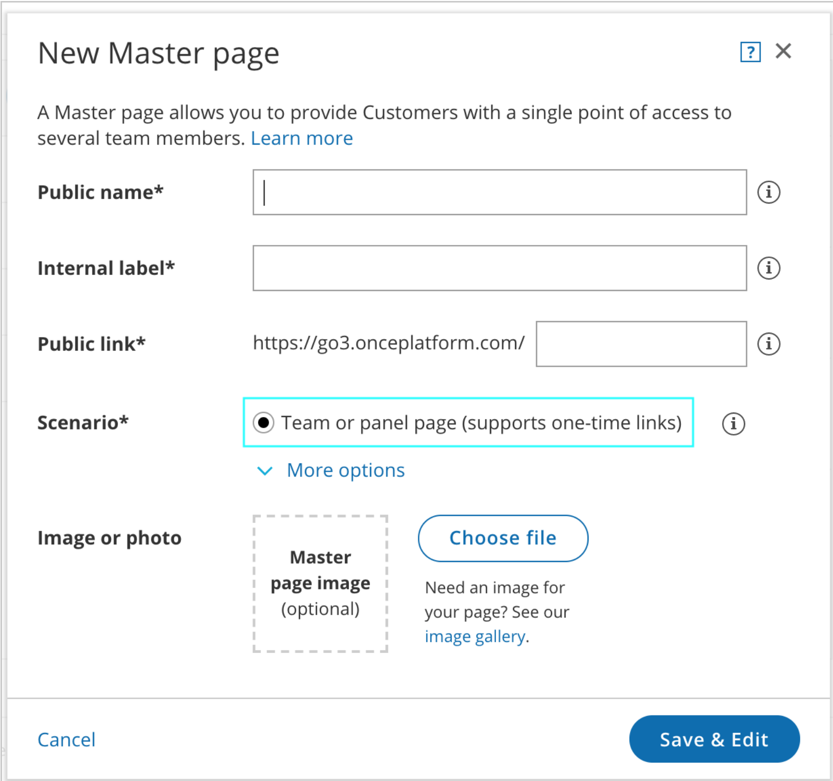


Figure 1: New Master page pop-up

4. In the Scenario field of the **New Master page** pop-up, select the Team or panel page scenario (Figure 1).
5. Populate the pop-up with a **Public name**, **Internal label**, **Public link** and an image if you choose. Then, click **Save & Edit**. You'll be redirected to the Master page Overview section to continue editing your settings.
6. Go to the Event types and assignment section of the Master page.

Tip:

When you use a Master page with team or panel pages, you can also generate one-time links which are good for one booking only, eliminating any chance of unwanted repeat bookings.

A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page. One-time links can be personalized, allowing the Customer to pick a time and schedule without having to fill out the Booking form.

7. In the **Event-based rules** section, click **Add Event type**.
8. Select which Event types will be offered in your Master page (Figure 3). For each Event type you want to add, you'll need to add a new rule. Master pages with Dynamic rules can only include Event types configured to Automatic booking and Single session. Learn more about conflicting settings when using team or panel pages

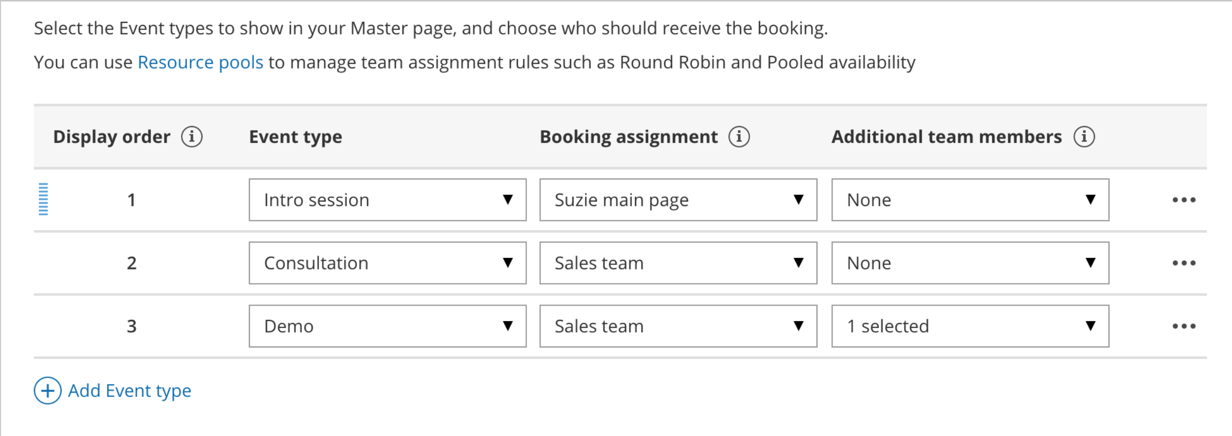


Figure 2: Add Event types

9. Under Booking assignment, choose a Booking page or Resource pool from which the Booking owner will be assigned.
10. Under **Additional team members**, select additional Booking pages and Resource pools to participate in the meeting. You can select an unlimited number of Additional team members.
11. Click **Save.**

> **Note:**
>
> The existing associations between Booking pages and Event types do not affect choosing an Additional team member. Any Booking page can be selected as an Additional team member to participate in your Panel meeting.

Scheduling and responding to booking requests

Last Modified on Oct 12, 2022

When you work in Booking with approval mode and a Customer submits a booking request, you'll receive an email with the suggested meeting times that the Customer selected. You can also access the suggested times directly from the activity in the Activity stream

In this article, you'll learn about responding to booking requests from Customers.

Requirements

To respond to a booking request, you must be the Owner, an Editor, or a Viewer of the Booking page that the booking was made on.

Scheduling a booking request

When you use Booking with approval mode, you can set the number of times your Customers must suggest. The more times you ask your Customers to suggest, the more flexibility you'll have when you pick the final time. Once a Customer submits their booking, you'll receive an email notification to review the suggested times and approve the booking request (Figure 1). The booking request will also be visible in your Activity stream.

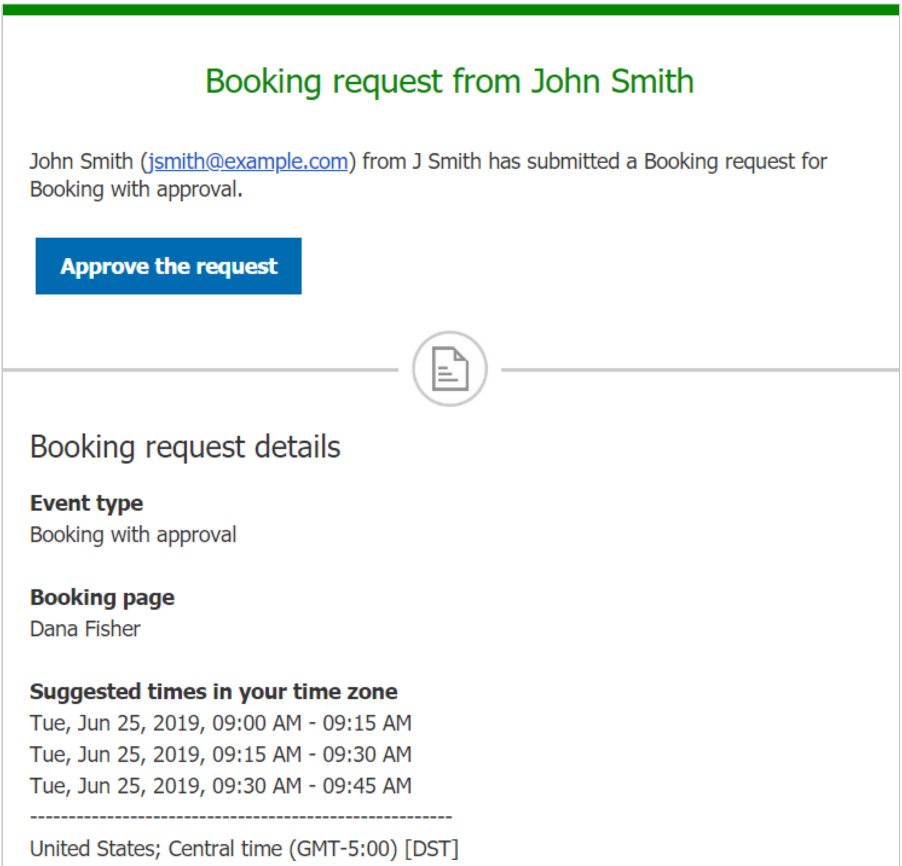


Figure 1: Booking request notification email

Approving a booking request

To schedule the booking request, click the **Approve the request** button in the email notification. This will open the **Find a time and schedule** page.

You can also schedule the booking request in your Activity stream. In the **Details** pane for the activity, select Approve the booking request (Figure 2). This will take you to the **Find a time and schedule** page.

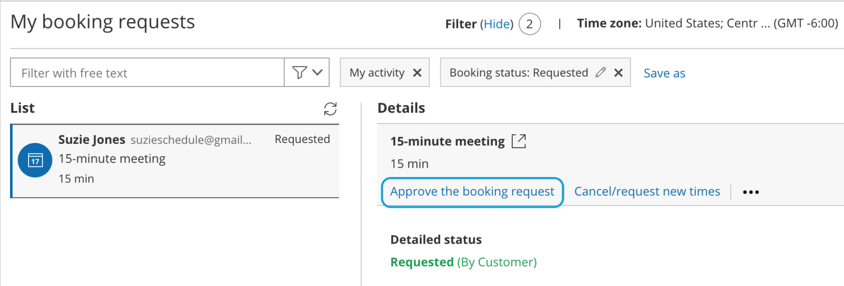


Figure 2: Schedule a booking button

The Find a time and schedule page

The **Find a time and schedule** page presents all the times selected by the Customer who submitted the booking request. The relevant days are highlighted with green in the Month row above the table.

To select a time, you can click on the green days directly, or use the arrow buttons (Figure 3).

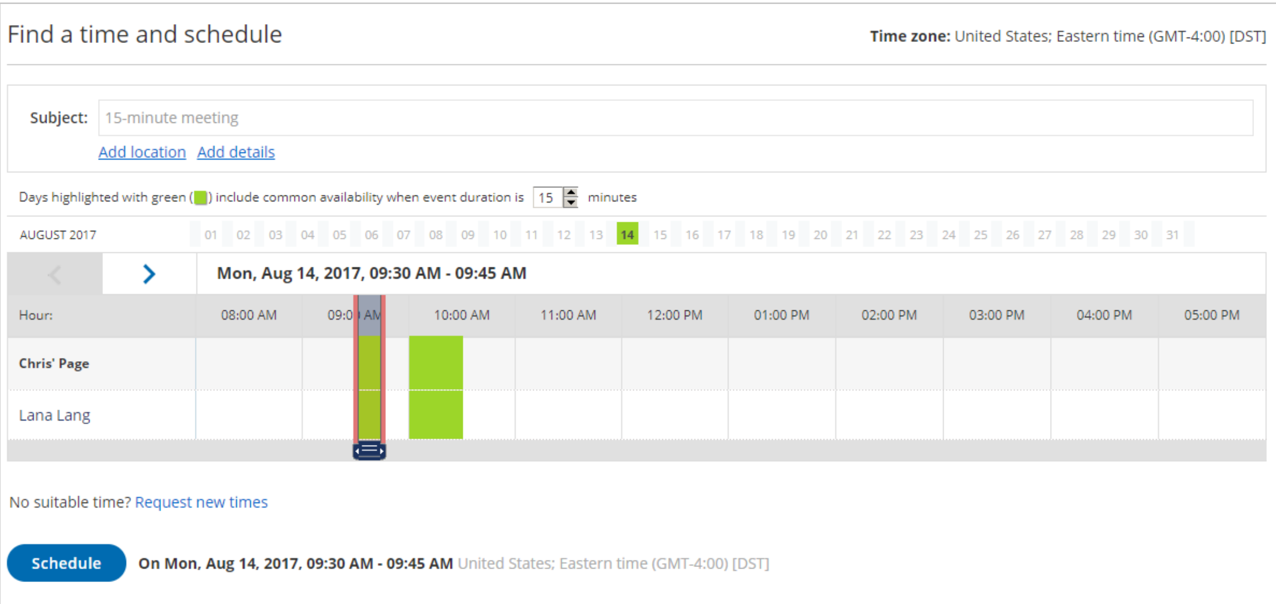


Figure 3: Find a time and schedule

When you click the **Schedule** button, the meeting is created in your selected calendar and a calendar invite can be sent to your Customers, depending on your Customer notification settings. In addition, OnceHub sends email confirmations with all the meeting details to your Customers based on your Customer notification settings.

Canceling a booking request or requesting new times

If none of the times work for you, you can click the **Request new times** link on the **Find a time and schedule** page.

You can also request new times or cancel the booking request in your Activity stream. In the **Details** pane for the activity, select **Cancel/request new times** (Figure 4). Learn more about managing bookings from the Activity stream

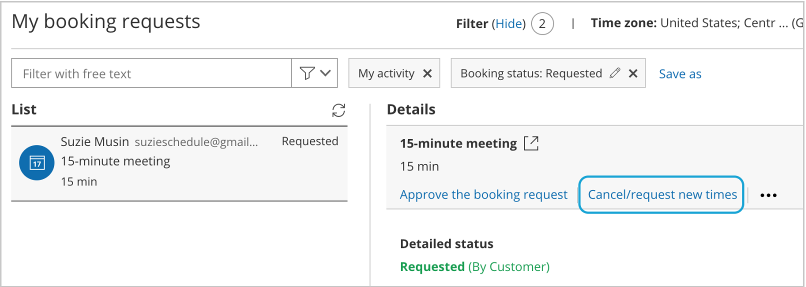


Figure 4: Cancel/request new times button

Learn more about canceling a booking request and requesting new times

User action: Cancel a booking request and request new times

Last Modified on Jul 16, 2020

When you work in Booking with approval mode and a Customer submits a booking request, you'll receive an email with the suggested meeting times that the Customer selected. You can also access the suggested times directly from the activity in the Activity stream.

If the times suggested by the Customer don't work for you, you can cancel the request or request new times. In both cases, email notifications will be sent to both the User and Customer. Learn more about the Customer notifications scenarios

In this article, you'll learn how to cancel a booking request and request new times or cancel a booking request.

Requirements

To cancel a booking request or request new times, you must be the Owner, an Editor, or a Viewer of the Booking page that the booking was made on.

Canceling a booking request and requesting new times

1. Select the activity in the Activity stream.
2. In the **Details** pane, select **Cancel/request new times** (Figure 1).

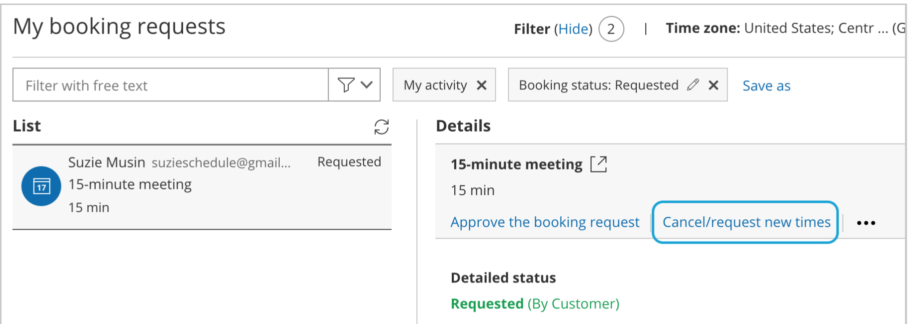


Figure 1: Cancel/request new times button

3. The **Cancel/request new times** pop-up will appear.
4. Select **Cancel the booking request and request new times** (Figure 2).

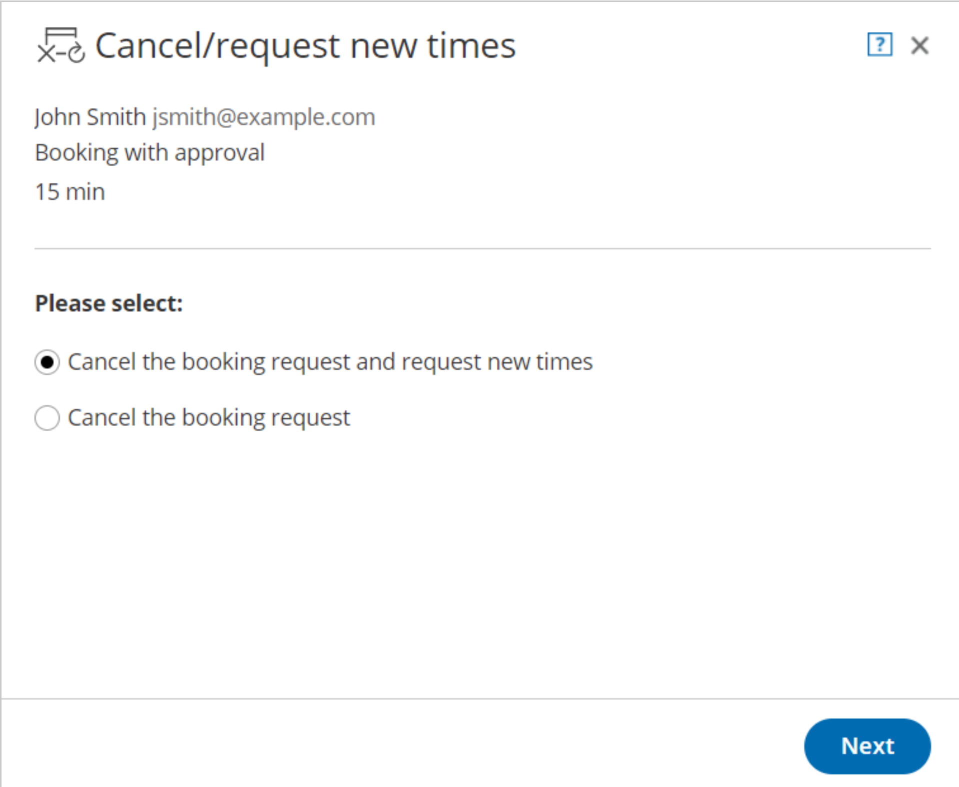


Figure 2: Cancel/request new times pop-up—selection step

5. Click **Next**.
6. In the **Notification** step, you can add a reschedule reason that will be provided to the Customer.
7. Click **Next**.
8. In the **Review** step, you can confirm the details of the booking request that you're about to cancel and request new times for.
9. Click the **Request new times** button to cancel the booking request and request new times.
10. In the **Confirmation** step, you'll see confirmation that your request for new times has been sent and that the former booking request has been canceled.
11. Both the User and the Customer will receive the **Booking request resubmission requested by User** email notification. Learn more about notification scenarios

Note:

You can always decide to change your selection by clicking **Back** at any step of the Cancel/request new times wizard.

To confirm the action, you must click the **Request new times** button in the last step of the wizard.

Canceling a booking request

1. Select the activity in the Activity stream.
2. In the **Details** pane, click the **Cancel/request new times** button (Figure 3).

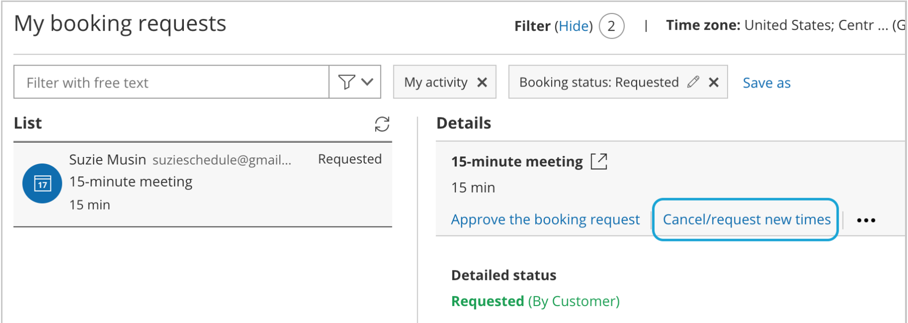


Figure 3: Cancel/request new times button

3. The **Cancel/request new times** pop-up will appear.
4. Select **Cancel the booking request** (Figure 4).

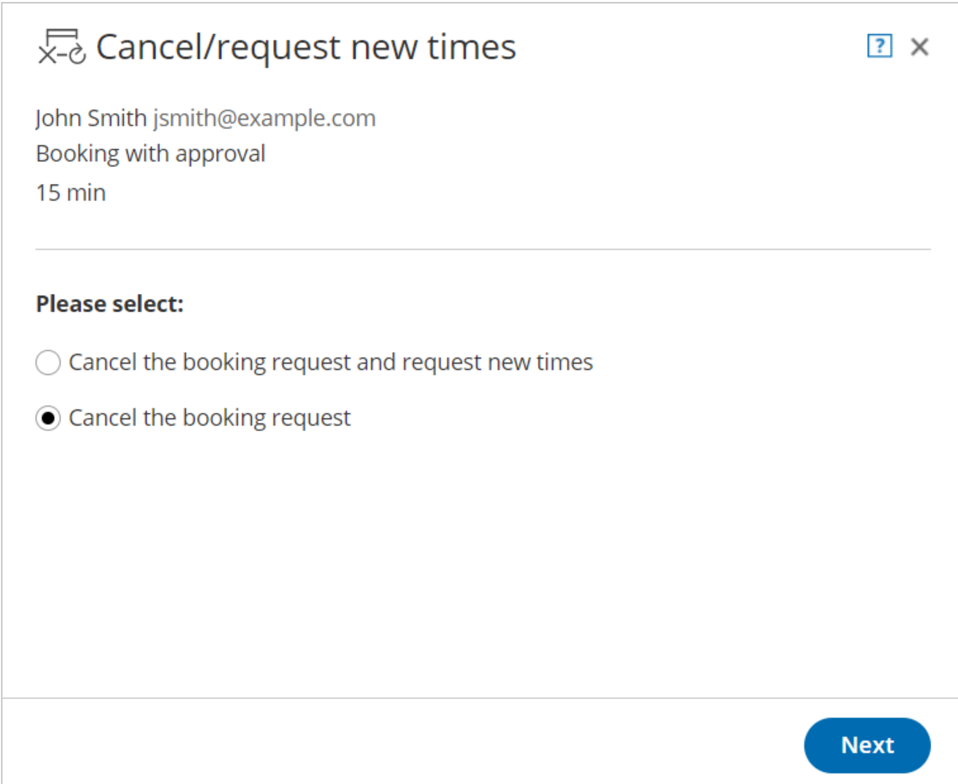


Figure 4: Cancel/request new times pop-up—selection step

5. Click **Next**.
6. In the **Notification** step, you can add a reschedule reason that will be provided to the Customer.
7. Click **Next**.
8. In the **Review** step, you can confirm the details of the booking request that you're about to cancel or request new times for.
9. Click **Cancel the booking request** to cancel the request.
10. In the **Confirmation** step, you'll see confirmation that the activity has been canceled and all attendees have been notified.
11. Both the User and Customer will receive the **Booking request canceled by User** email notification. Learn more about notification scenarios

Note:

You can always decide to change your selection by clicking **Back** at any step of the Cancel/request new times process.

To confirm the action, you must click the **Cancel the Booking request** in the last step of the wizard.

Customer action: Cancel a booking request

Last Modified on Jun 27, 2019

A Customer can cancel a booking request at any time. Booking requests that have not been approved are not subject to the cancellation policy set by the meeting organizer. The Cancellation policy applies only to scheduled or rescheduled bookings.

In this article, you'll learn about the steps that a Customer takes to cancel a booking request.

How Customers cancel a booking request

1. To cancel a booking request, the Customer clicks the **Cancel/reschedule** link in the scheduling confirmation email (Figure 1).

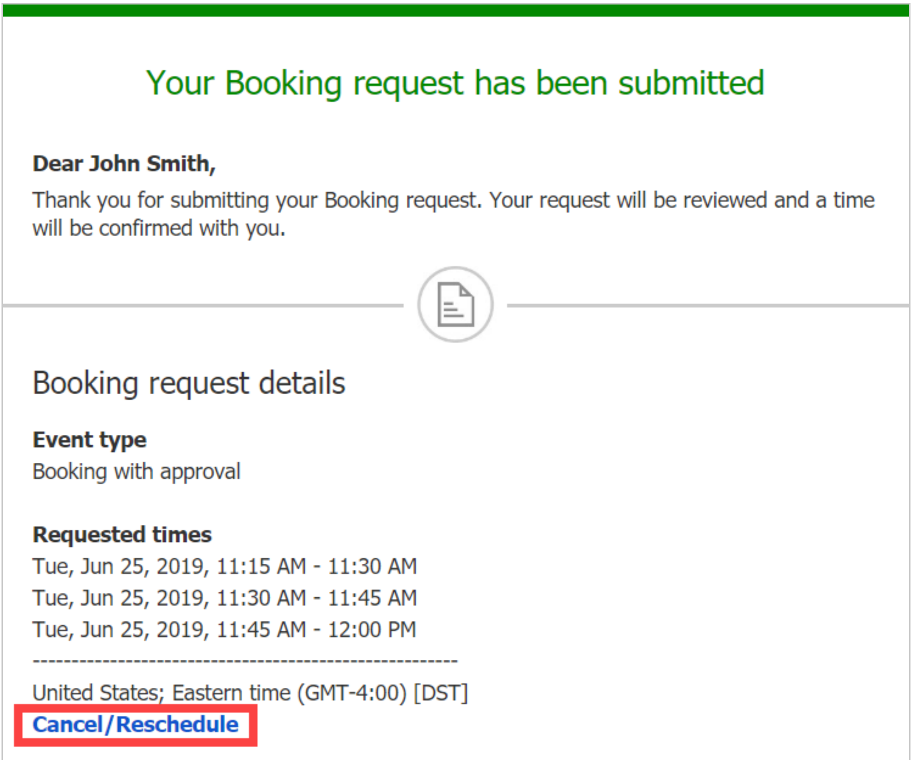


Figure 1: Booking request confirmation email

2. The Cancel/reschedule page will open.
3. The Customer can review the booking request details on the **Keep** tab.
4. In the **Cancel** tab, the Customer clicks the **Cancel the booking request** button to cancel the booking request (Figure 2). The Customer also provides a reason for requesting new times if it is required by your Cancel/reschedule policy.

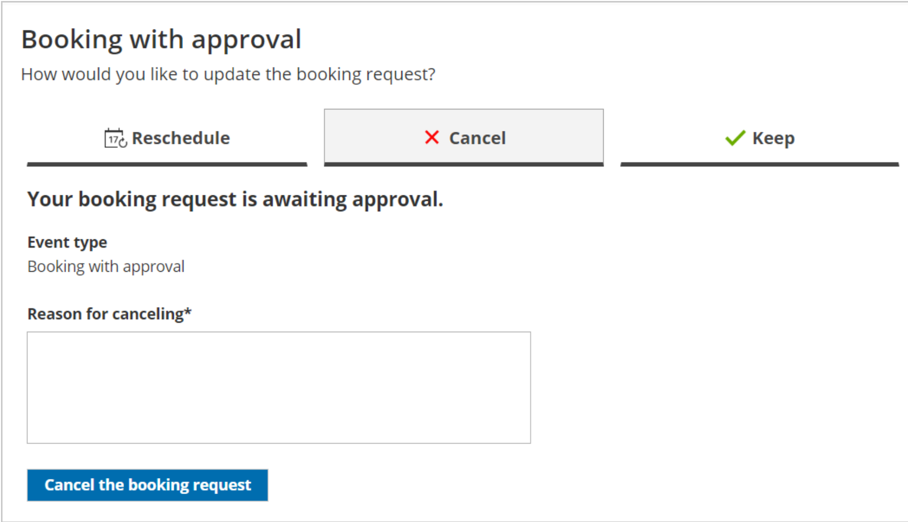


Figure 2: Cancel tab

5. After cancellation, the Customer will receive a cancellation email notification, along with the Booking page Owner and any additional stakeholders.

Learn more about the effects of cancellation

Customer action: Resubmit a booking request

Last Modified on Sep 26, 2019

A Customer can resubmit a booking request as many times as they like. Booking requests are not subject to the Reschedule policy set by the meeting organizer. The Reschedule policy applies only to scheduled or rescheduled bookings.

How Customers resubmit a booking request

1. To resubmit a booking request, the Customer clicks the **Cancel/Reschedule** link in the scheduling confirmation email
(Figure 1).

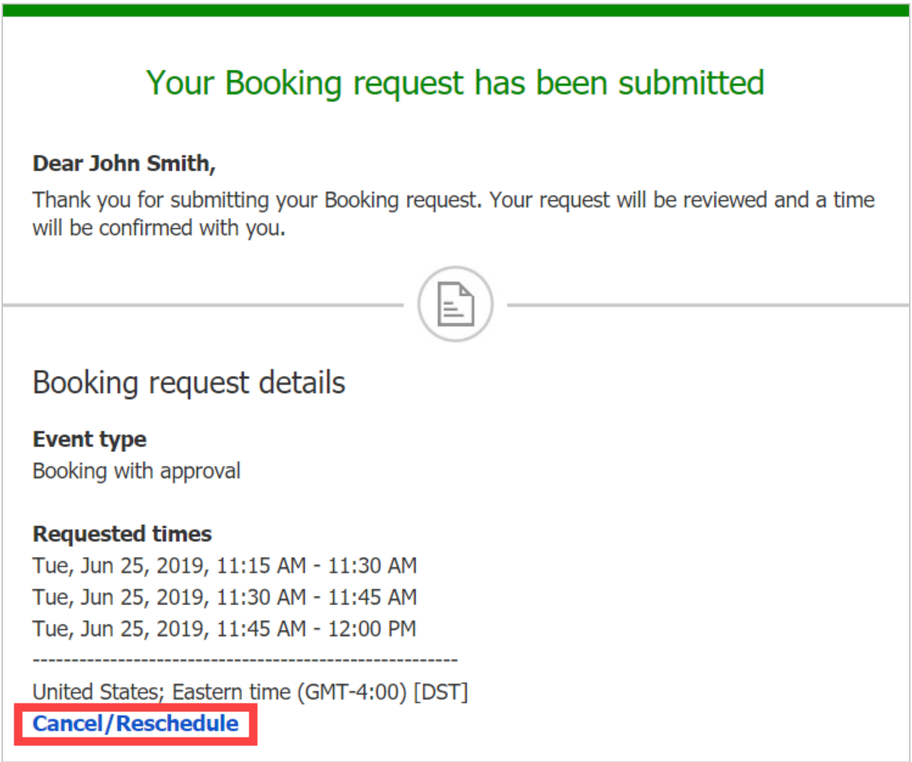


Figure 1: Booking request confirmation email

2. The Cancel/reschedule page will open.
3. On the **Reschedule** tab, the Customer clicks the **See available times** button (Figure 2).

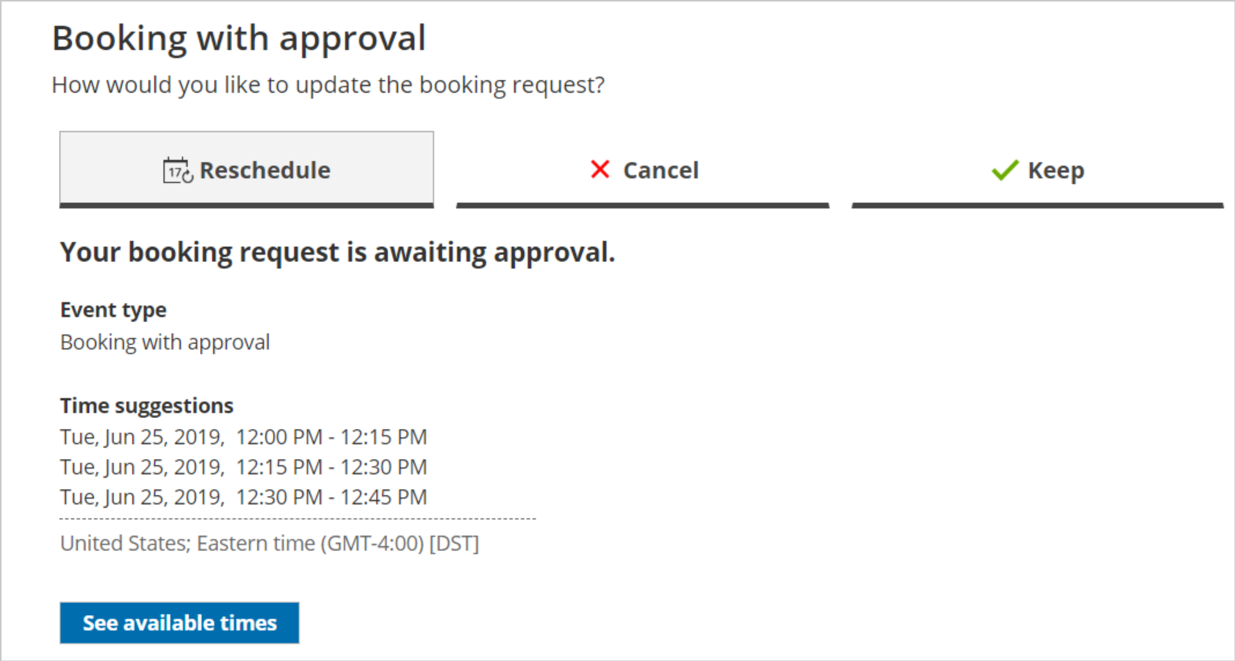


Figure 2: Reschedule tab

4. The Customer selects new dates and times and provides a reason for requesting new times if it is required by your Cancel/reschedule policy.
5. The Booking form step is skipped because all the required information was already provided by the Customer when they made the booking.
6. After rescheduling, the Customer will receive a reschedule email notification, along with the Booking page Owner and any additional stakeholders.

Learn more about the effect of rescheduling

Introduction to canceling and rescheduling

Last Modified on Jun 5, 2023

Both Users and Customers can cancel and reschedule booking made via OnceHub. You can set the Customer cancellation and reschedule policies that apply to bookings with an activity status of **Scheduled** and **Rescheduled**.

The Customer Cancel/reschedule policy

OnceHub allows you to set up independent cancellation and reschedule policies that are fully configurable. The policies allow you to specify the exact rules for when Customers are allowed to cancel or reschedule. Customers are always subject to the Customer Cancel/reschedule policy, with the exception canceling or rescheduling booking requests which have not yet been approved.

Users are not subject to the Customer cancellation and reschedule policy and can always cancel, request reschedule, or request new times directly from the Activity stream.

> **Note:**
>
> You can cancel or reschedule directly from your calendar if you OnceHub account is connected to Google Calendar and Exchange/Outlook Calendar.
>
> Learn more about calendar connection

Customer actions

When a Customer cancels or reschedules a booking, OnceHub tracks the changes in the Activity stream. The Customer, Booking page Owner, and any additional stakeholders are all immediately notified.

To cancel or reschedule, Customers click the **Cancel/reschedule** link in the scheduling confirmation email or calendar event. This will take them to the same Booking page or Master page where the booking was originally made.

On the Customer Cancel/reschedule page, the Customer can cancel or resubmit a booking request, cancel or reschedule a single booking, or cancel or reschedule one or more sessions in a Session package.

Customer action: Cancel/reschedule a single booking

To cancel a single booking or reschedule a single booking, the Customer uses the **Cancel** tab or **Reschedule** tab on the Cancel/reschedule page.

Learn more about how a Customer cancels a booking

Learn more about how a Customer reschedules a booking

> **Note:**
>
> If you use Payment integration, you can enable automatic refunds when Customers cancel a booking.

Customer action: Cancel/reschedule a Panel meeting

To cancel or reschedule a Panel meeting, the Customer uses the **Cancel** tab or **Reschedule** tab on the Cancel/reschedule page.

Learn more about how a Customer cancels a Panel meeting

Learn more about how a Customer reschedules a Panel meeting

Customer action: Cancel/reschedule sessions in a package

To cancel or reschedule sessions in a package, the Customer selects one or more sessions on the Cancel/reschedule page and then cancels or reschedules the selected sessions.

Learn more about how a Customer cancel sessions in a package

Learn more about how a Customer reschedules sessions in a package

Note:

When you use Payment integration, you can charge Customers a reschedule fee when they reschedule one or more sessions in a package. This enables you to generate an additional revenue stream and reduces unnecessary rescheduling activity. The Reschedule fee amount is always relative to the number of sessions included in the Session package.

Customer action: Cancel/resubmit a Booking request

Booking requests that are not yet scheduled are not subject to the Customer cancel/reschedule policy. The Customer can cancel or reschedule a booking request any time before it is approved.

To cancel or request new times, the Customer simply clicks **Cancel the booking request** or **Reschedule the booking request** on the Cancel/reschedule page.

Learn more about how a Customer cancels a booking request

Learn more about how a Customer reschedules a booking request

User actions

As a User, you can always cancel a booking, request to reschedule a booking, cancel a booking request, or cancel a booking request and request new times directly from your Activity stream. When the activity status of a booking is **Scheduled**, **Rescheduled**, **No-show**, or **Completed**, you can request to cancel or reschedule a booking directly from the Activity stream.

When you request to reschedule a meeting, the booking is canceled and a reschedule request email notification is sent to you and the Customer. To reschedule, the Customer clicks the **Reschedule now** button directly from the email notification or Calendar event. Learn more about the effects of rescheduling

When you cancel a booking, a cancellation email notification is sent to both you and the Customer. Learn more about the effects of cancellation

User action: Cancel/request to reschedule for Booking pages with Event types

To cancel or request reschedule of a booking with Event types, select the activity in the Activity stream. Then, in the **Details** pane, click the **Cancel/request reschedule** button.

In the **Cancel/request reschedule** pop-up, you can choose to request to reschedule with the same Event type, request to reschedule with any Event type, or cancel the booking. Learn more about cancel/request reschedule by User with Event types

Note:

When you use Payment integration, if you request a reschedule for the same Event type, the Customer will not be asked to pay a Reschedule fee for rescheduling. The payment data will be reassigned from the canceled booking to the rescheduled booking in the **Activity stream** upon rescheduling.

If you request a reschedule with any Event type, the original booking is canceled and refunded. The Customer will be asked to pay the full Event type price when rescheduling with the new Event type, as if it was a new booking.

If you cancel a booking, refunds can be processed manually via OnceHub. In this case, manual refunds can be processed directly from the **Cancel/request reschedule** pop-up in the **Refund** step.

User action: Cancel/request to reschedule for Booking pages without Event types

Tip:

We recommend using Event types with your Booking page. Event types allow you to offer several meeting types with different durations, price, and other properties.

To cancel or request to reschedule a booking made on a Booking page without Event types, select the activity in the Activity stream. Then, in the **Details** pane, click the **Cancel/request reschedule** button.

In the **Cancel/request reschedule** pop-up, you can choose to request to reschedule or cancel the booking and follow the step-by-step instructions to complete the action. Learn more about cancel/request reschedule by User without Event types

User action: Cancel a Booking request and request new times

To cancel a booking request or request new times when working in Booking with approval, select the activity in the Activity stream. Then, in the **Details** pane, click the **Cancel/request new times** button.

In the **Cancel/request new times** pop-up, you can choose to request new times or cancel the booking request and follow the step-by-step instructions to complete the action. Learn more about cancel/request new times by User

The Customer Cancel/reschedule policy

Last Modified on Oct 12, 2022

OnceHub allows you to set up independent cancellation and reschedule policies that are fully configurable. The policies allow you to specify the exact rules for when Customers are allowed to cancel or reschedule.

Defining your cancellation and reschedule policy

On the Cancel/reschedule policy page, you can customize the policy description presented to your Customers and choose whether or not Customers will be requested to provide a reason when they cancel or reschedule. You can choose to make providing the reason **Mandatory**, **Optional**, or choose not to display the field at all by selecting **Don't ask**.

You can define different policies for different scheduling scenarios. The policies you define are displayed on the Customer Cancel/reschedule section. This allows your Customers to make an informed decision before they proceed with the cancel/reschedule action.

The three timeframe options available for when cancellations and reschedules can be made by your Customers are:

- **Any time before the meeting:** This means that Customers can cancel right before the scheduled meeting time. This can be a matter of minutes before the meeting.
- **Up to a certain time before the meeting:** In this case, you can select how long before the scheduled meeting time that the Customer can cancel. The possible values range from 15 minutes to 14 days.
- **Never:** In this case, the Customer will never be able to cancel the booking.

Location of the Cancel/reschedule policy page

Depending on whether or not your Booking pages are associated with Event types, the location of the Cancel/reschedule policy page and the options available to you change.

Booking pages not associated with Event types

When you use Booking pages without Event types, the cancellation and reschedule policies are set at the Booking page level under the **Cancel/reschedule policy** section (Figure 1). Learn more about the Cancel/reschedule policy section

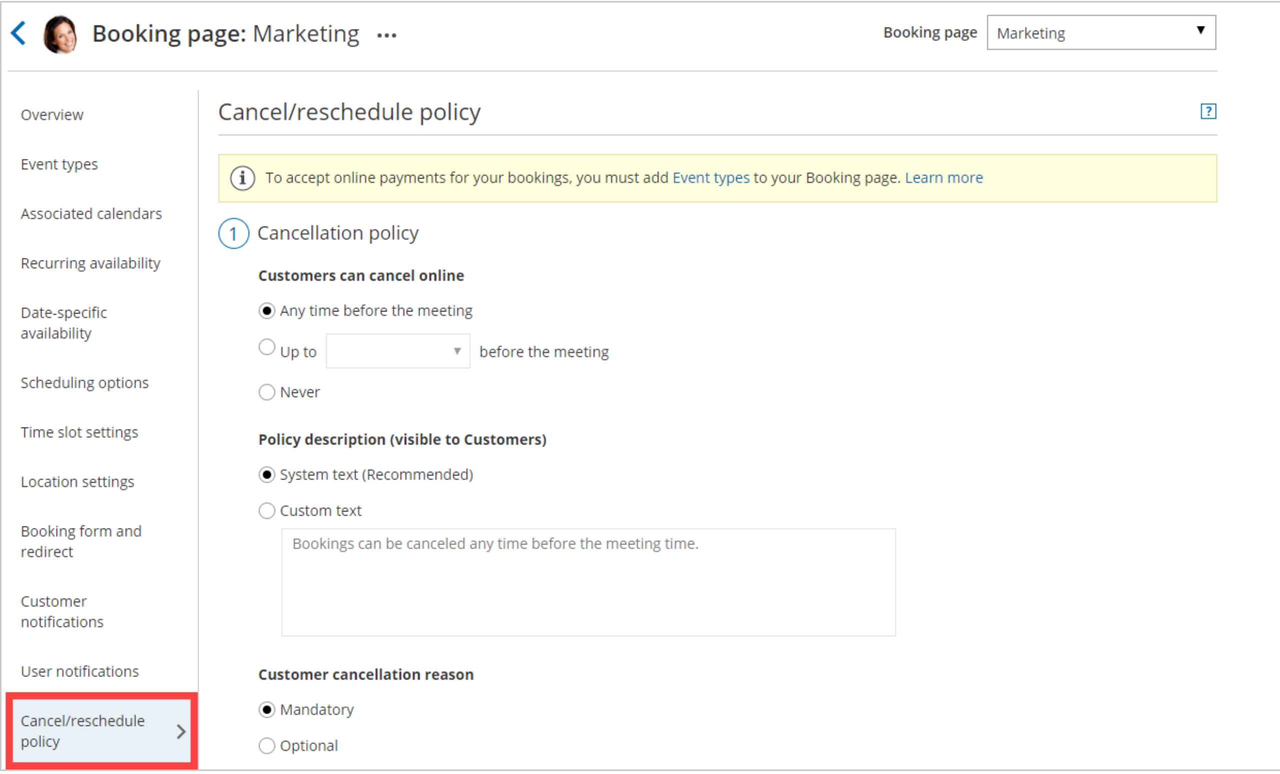


Figure 1: Cancel/reschedule policy on a Booking page not associated with Event types

Booking pages associated with Event types

If you have associated your Booking page with at least one Event type, the cancellation and reschedule policies are set at the Event type level under the **Payment and Cancel/reschedule policy** section (Figure 2).

Learn more about the payment and cancel/reschedule policy section

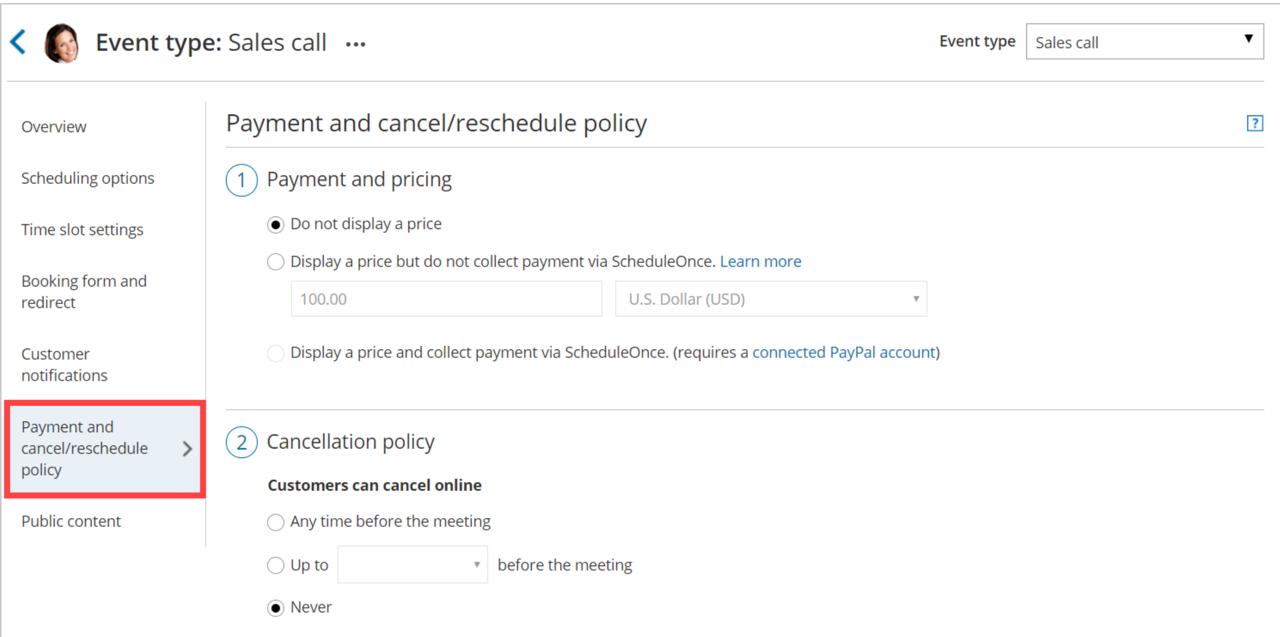


Figure 2: Payment and cancel/reschedule policy section

The cancellation/reschedule policies in Event types are configured together with payments. In addition to specifying the timeframe for canceling or rescheduling, you can also define the monetary penalties that Customers will face if they cancel or reschedule.

Depending on which **Payment and pricing** option you pick, the ability to set up policies with monetary penalties and automatically handle refunds and rescheduling fees changes.

Do not display a price

This option only allows you to set the timeframe during which Customers can cancel or reschedule. This option does not allow you to set up monetary penalties within your cancellation and reschedule policies.

Learn more about the cancel/reschedule policy when a price is not displayed

Display a price but do not collect payment via OnceHub

This option allows you to set the timeframe during which Customers can cancel or reschedule, as well as define the monetary penalties that Customers will face when cancelling or rescheduling.

However, because you are only displaying a price and are not collecting payments via OnceHub, refunds and rescheduling fees can only be defined in text in the description policy. These policies cannot be enforced in OnceHub. In other words, you remain in charge of processing the rescheduling fees and refunds.

Learn more about the cancel/reschedule policy when a price is displayed

Display a price and collect payment via OnceHub

This options allows you to set the timeframe during which Customers can cancel or reschedule, as well as define and enforce the monetary penalties that Customers will face when cancelling or rescheduling.

Since your OnceHub account is connected to PayPal with this option, the handling of refunds and rescheduling fees can be completely automated. This allows you to streamline your payments throughout the booking lifecycle. If you prefer, you can still choose to manually process refunds.

Learn more about the cancel/reschedule policy when collecting payment via OnceHub

The Customer Cancel/reschedule page

Last Modified on Jun 27, 2019

The Cancel/reschedule page allows Customers to cancel and reschedule bookings subject to the Cancel/reschedule policy you set on your Booking page or Event type. Customers access the Cancel/reschedule page by clicking the **Cancel/reschedule** link in the scheduling confirmation email or the calendar event for the booking.

Customer action: Cancel or reschedule a booking

To cancel a booking or reschedule a booking, the Customer can click the **Cancel/Reschedule** link in the scheduling confirmation email or calendar event. This will take them to the same Booking page or Master page where the Booking was previously made.

On the Cancel/reschedule page (Figure 1), the Customer has the option to keep the original time, reschedule the booking, cancel a single booking, or cancel one or more sessions in a package. If the Customer clicks **See available times**, they will be prompted to select a new time and reschedule the meeting.

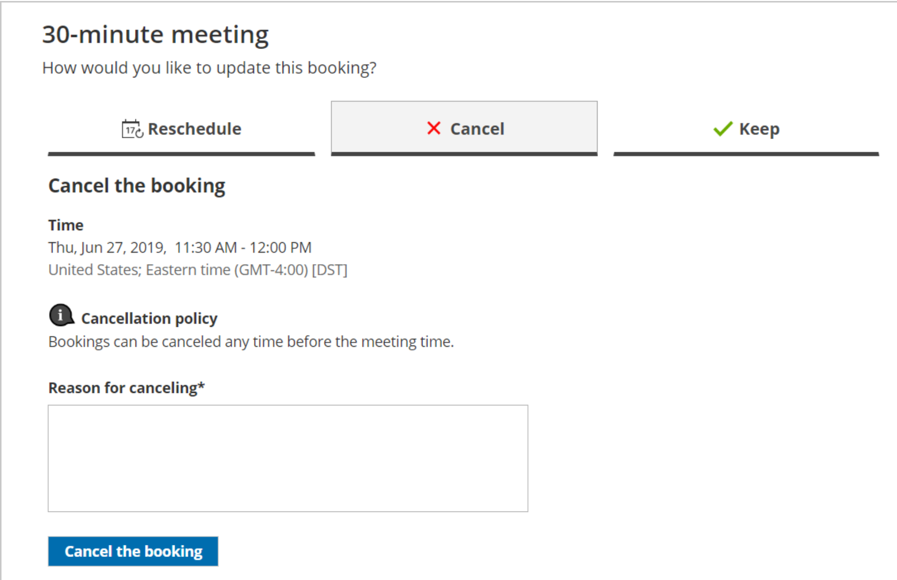


Figure 1: Canceling a booking

Note:

If you're using Payment integration, you can charge the Customer a reschedule fee or automatically send refunds when they reschedule or cancel bookings. The policy settings will vary based on the Payment and cancel/reschedule policy options that you choose.

Customer action: Cancel or reschedule sessions in a package

To cancel sessions or reschedule sessions in a package, the Customer selects one or more sessions on the Cancel/Reschedule page and then cancels or reschedules the selected sessions (Figure 2).

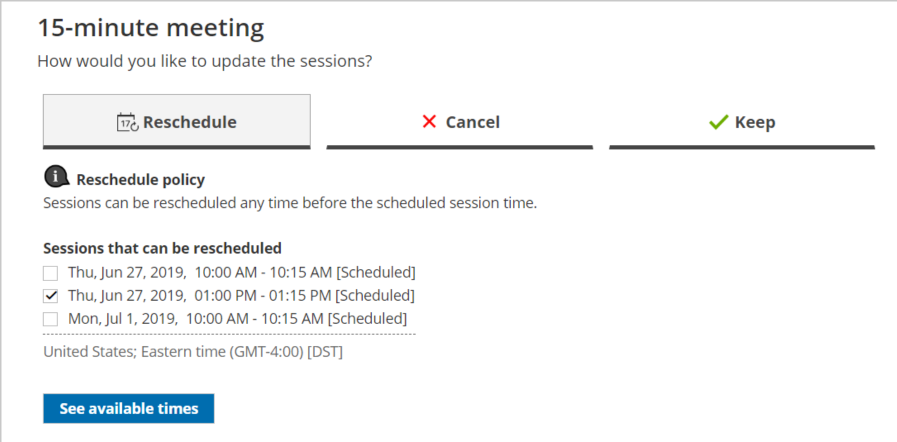


Figure 2: Rescheduling sessions in a package

Note:

If you are using Payment integration, you can charge the Customer a reschedule fee or automatically send refunds when they reschedule or cancel bookings. The reschedule fee or refund amount is always relative to the number of sessions included in the Session package.

Customer action: Cancel/reschedule a booking request

Booking requests that are not yet scheduled are not subject to the Customer Cancel/reschedule policy. The Customer can cancel or reschedule a booking request any time before it is approved. Learn more about booking requests

To cancel a booking request, the Customer can click **Cancel the booking request** on the **Cancel** tab (Figure 3). To request new times, the Customer can click **See available times** on the **Reschedule** tab.

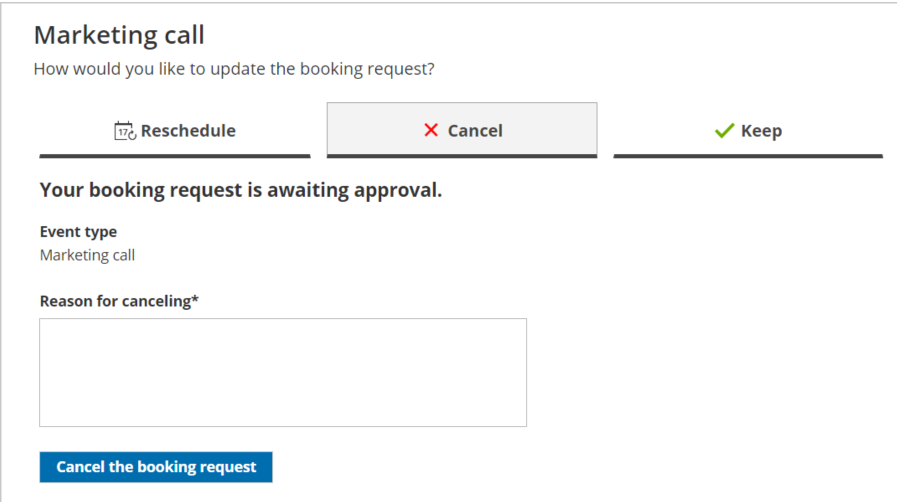


Figure 3: Cancel a booking request

Customer action: Cancel a single booking

Last Modified on Jul 5, 2019

Whether or not a Customer can cancel a booking is subject to the cancellation policy you've set on your Booking page or Event type. The cancellation policy only applies to scheduled bookings.

In this article, you'll learn about the steps a Customer takes to cancel a single booking.

How Customers cancel a single booking

1. The Customer clicks the **Cancel/reschedule** link in the scheduling confirmation email (Figure 1) or in the calendar event.

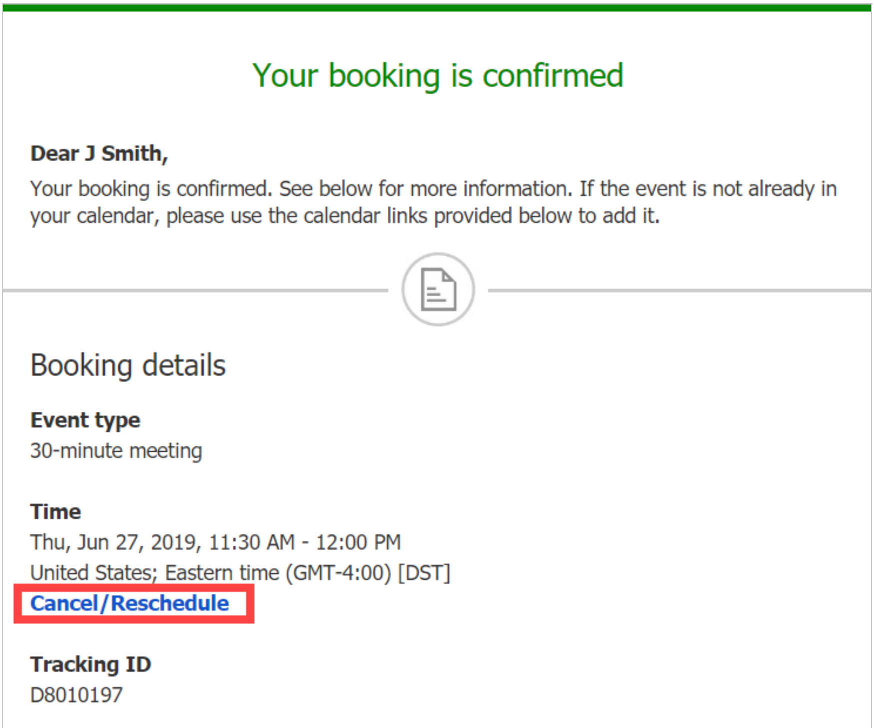


Figure 1: Booking confirmation email

2. The Cancel/reschedule page will open.
3. In the **Keep** tab, the Customer can review the details of the booking.
4. In the **Cancel** tab, the Customer can click **Cancel the booking** to cancel the booking (Figure 2). Depending on your Cancel/reschedule policy, the Customer can be asked to provide a reason for canceling.

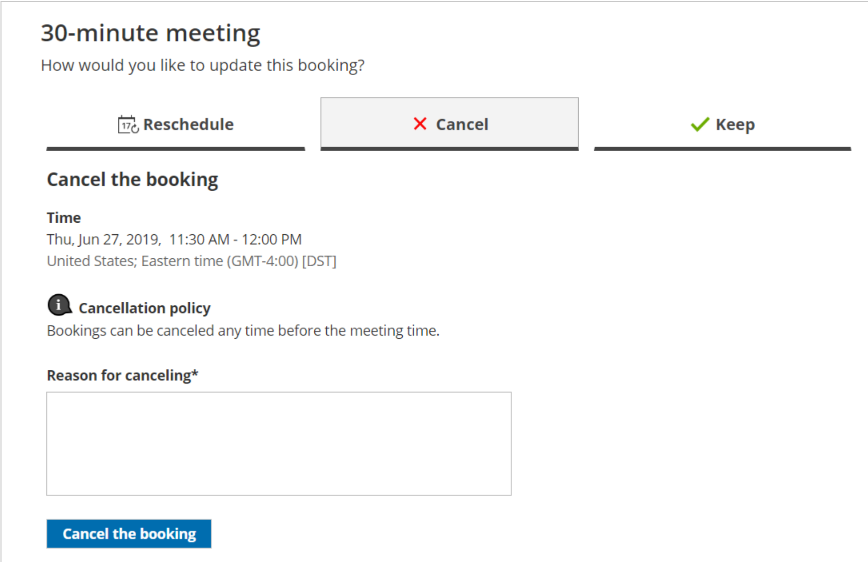


Figure 2: Canceling a booking

> **Note:**
>
> When using Payment integration, you can enable automatic refunds when Customers cancel a booking or one or more sessions in a package. This enables you to build trust and increase customer satisfaction. Learn more about enabling automatic refunds

5. Once the booking has been canceled, the Customer will receive a cancellation email notification, along with the Booking page Owner and any additional stakeholders.

Learn more about the effects of cancellation

> **Note:**
>
> If you use Payment integration, you can enable automatic refunds when Customers cancel a booking. Learn more about enabling automatic refunds

Customer action: Reschedule a single booking

Last Modified on Jul 1, 2019

Whether or not a Customer can reschedule a booking is subject to the Cancel/reschedule policy that you've set on your Booking page or Event type. The Reschedule policy only applies to scheduled bookings.

In this article, you'll learn about the steps that a Customer takes to reschedule a single booking.

How Customers reschedule a single booking

1. The Customer clicks the **Cancel/Reschedule** link in the scheduling confirmation email (Figure 1) or in the calendar event.

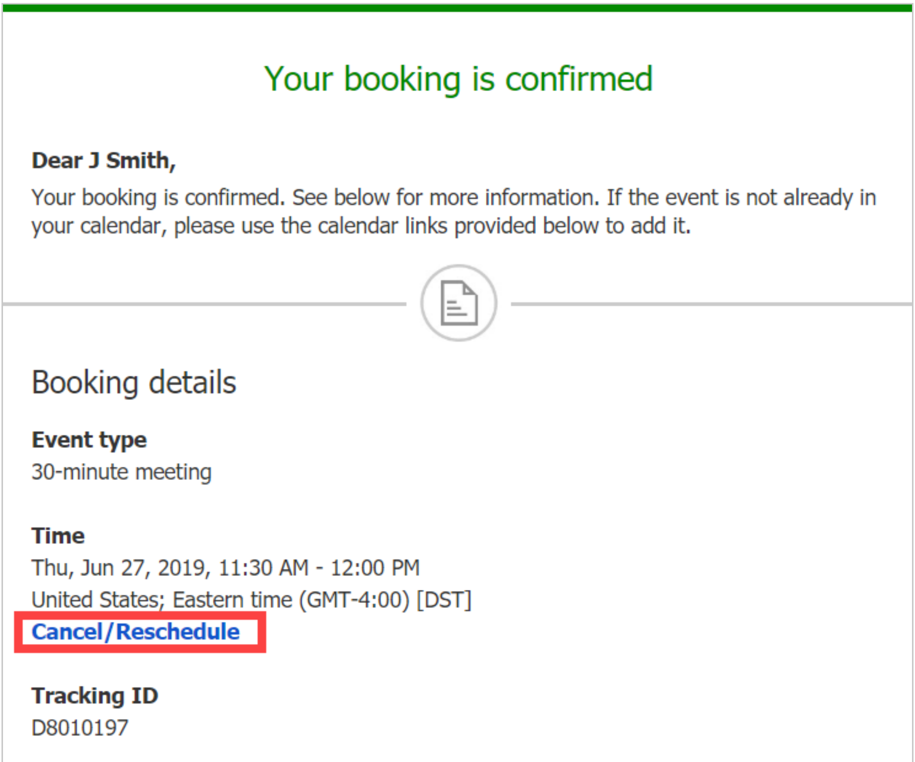


Figure 1: Booking confirmation email

2. The Cancel/reschedule page will open. In the **Reschedule** tab, the Customer clicks **See available times** (Figure 2) and then selects a new date and time.

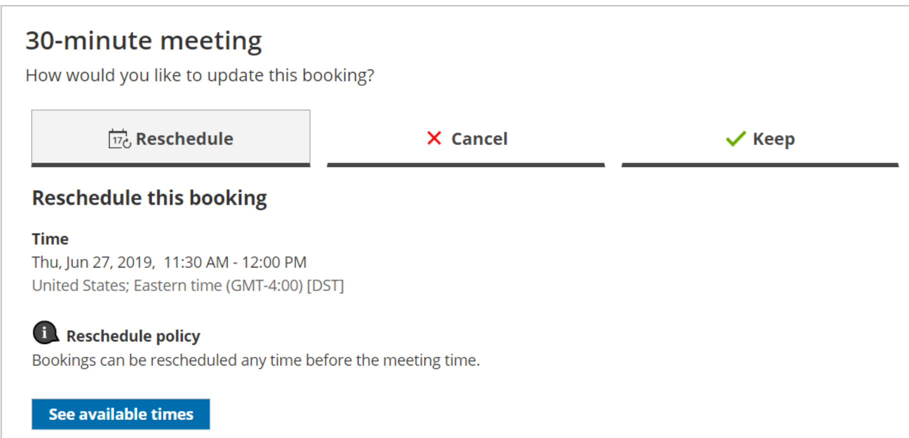


Figure 2: Reschedule tab

3. If your Cancel/reschedule policy asks for a reason for rescheduling, the Customer will be prompted to provide one.
4. The Booking form step is skipped, since all the required information was already provided by the Customer when they made the booking.
5. Once the booking has been rescheduled, an email notification is sent to the Customer, the Booking owner, and any additional stakeholders.

Learn more about the effect of rescheduling

Note:

If you use Payment integration, you can charge Customers a reschedule fee when they reschedule a booking. This enables you to generate an additional revenue stream and reduces unnecessary rescheduling activity.

Customer action: Cancel sessions in a package

Last Modified on Jul 1, 2019

Whether or not a Customer can cancel sessions in a package is subject to the cancellation policy you've set on your Booking page or Event type. The cancellation policy only applies to scheduled bookings.

In this article, you'll learn about the steps that a Customer takes to cancel sessions in a package.

How Customers cancel sessions in a package

1. The Customer clicks the **Cancel/reschedule** link in the scheduling confirmation email (Figure 1) or the calendar event.

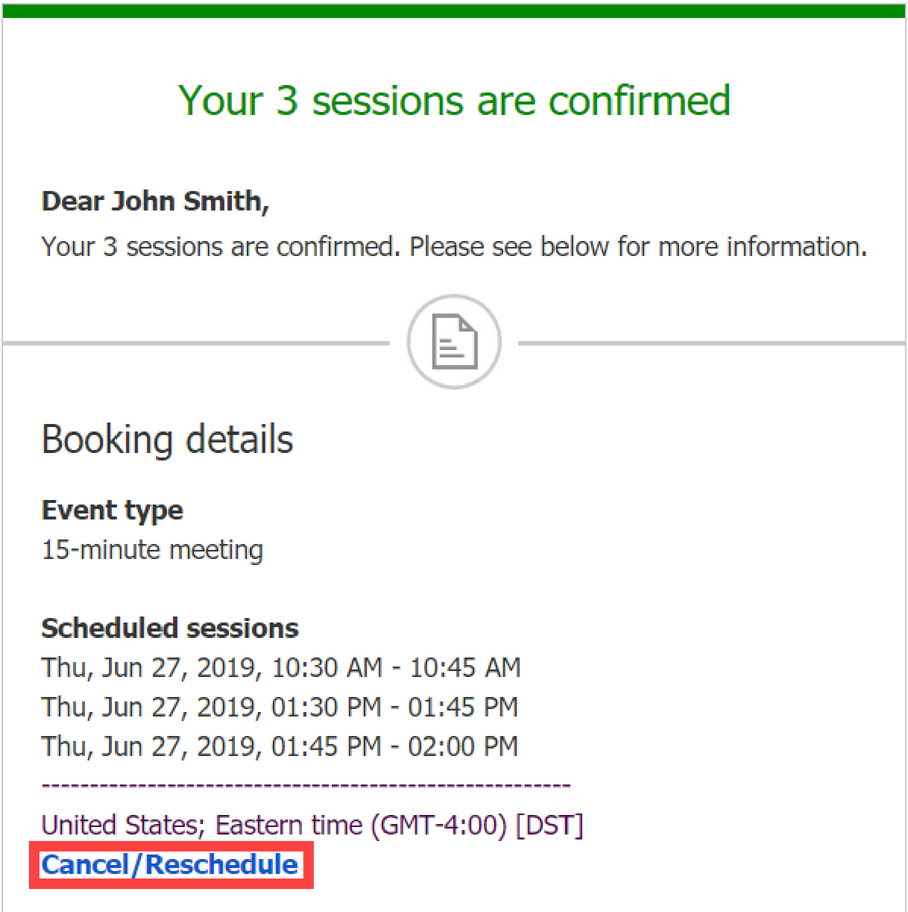


Figure 1: Booking confirmation email

2. The Cancel/reschedule page will open.
3. In the **Cancel** tab, the Customer selects the sessions that they want to cancel (Figure 2). Depending on your Cancel/reschedule policy, the Customer can be asked to provide a reason for canceling.

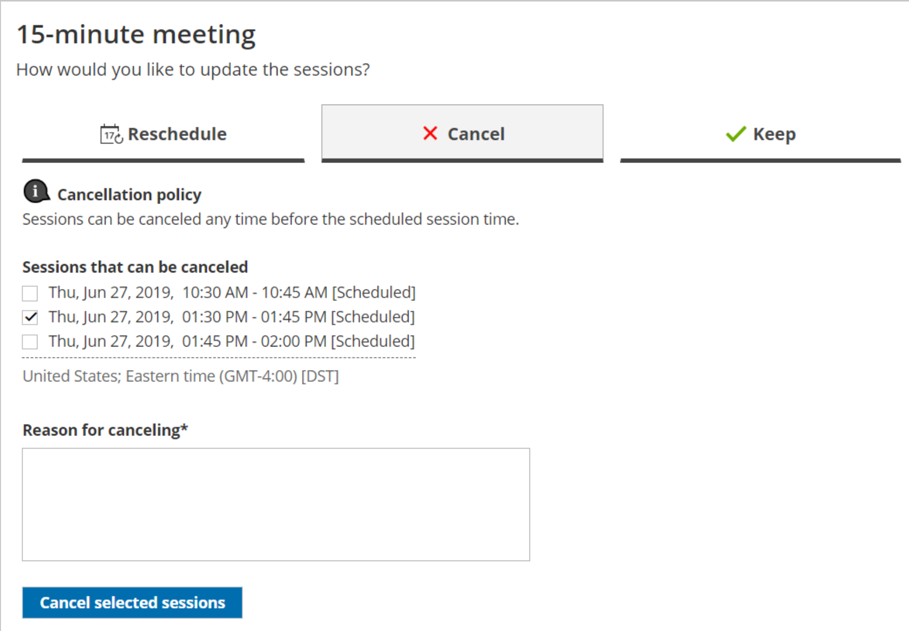


Figure 2: Cancel tab

4. Once the sessions have been cancelled, a cancellation email notification is sent to the Customer, the Booking owner, and any additional stakeholders.
5. If the Customer added these events to their calendar, they will have to remove them manually.

Learn more about the effects of cancellation

> **Note:**
>
> If you use Payment integration, you can enable automatic refunds when Customers cancel one or more sessions in a package. Learn more about enabling automatic refunds

Customer Action: Reschedule sessions in a package

Last Modified on Jul 1, 2019

Whether or not a Customer can reschedule sessions in a package is subject to the Cancel/reschedule policy you've set on your Booking page or Event type. The Reschedule policy only applies to scheduled bookings.

In this article, you'll learn about the steps that a Customer takes to reschedule sessions in a package.

How Customers reschedule sessions in a package

1. The Customer clicks the **Cancel/Reschedule** link in the scheduling confirmation email (Figure 1) or in the calendar event.

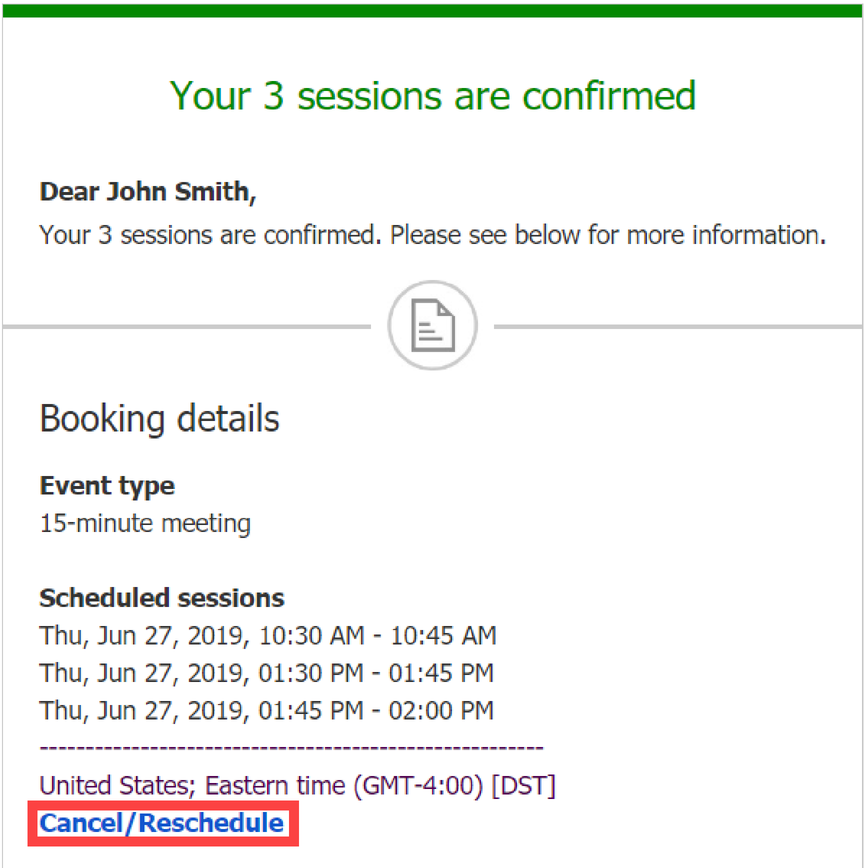


Figure 1: Booking confirmation email

2. The Cancel/reschedule page will open.
3. In the **Reschedule** tab, the Customer selects the sessions to be rescheduled (Figure 2).

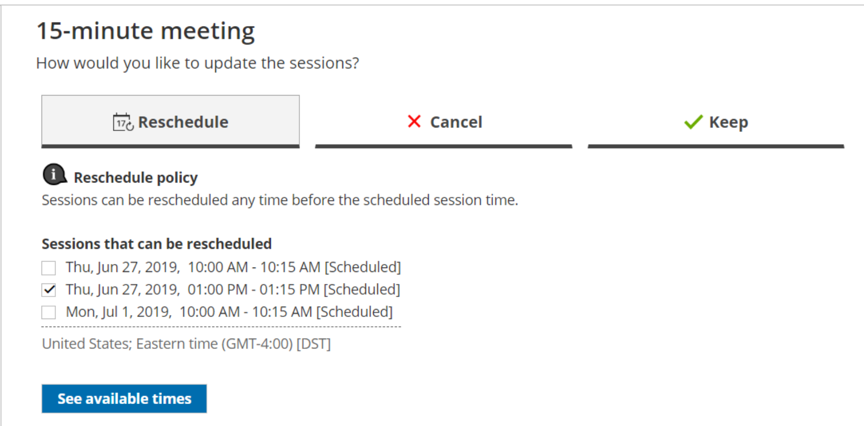


Figure 2: Rescheduling sessions in a package

4. The Customer clicks **See available times** and then selects new dates and times.
5. Depending on your Cancel/reschedule policy, the Customer can be asked to provide a reason for rescheduling.
6. The Booking form step is skipped since all the required information was already provided by the Customer when they made the booking.
7. Once the sessions have been rescheduled, an email notification is sent to the Customer, the Booking page Owner, and any additional stakeholders.

Learn more about the effect of rescheduling

Note:

When using Payment integration, you can charge Customers a reschedule fee when they reschedule one or more sessions in a package. This enables you to generate an additional revenue stream and reduces unnecessary rescheduling activity. The Reschedule fee amount is always relative to the number of sessions included in the Session package.

Customer Action: Cancel a Panel meeting

Last Modified on Jul 1, 2019

Whether or not a Customer can cancel a Panel meeting is subject to the Cancel/reschedule policy you've set on your Booking page or Event type. The Cancellation policy only applies to scheduled bookings.

In this article, you'll learn about the steps that a Customer takes to reschedule a Panel meeting.

How Customers cancel Panel meetings

1. The Customer clicks the **Cancel/reschedule** link in the scheduling email notification (Figure 1) or in the calendar event.

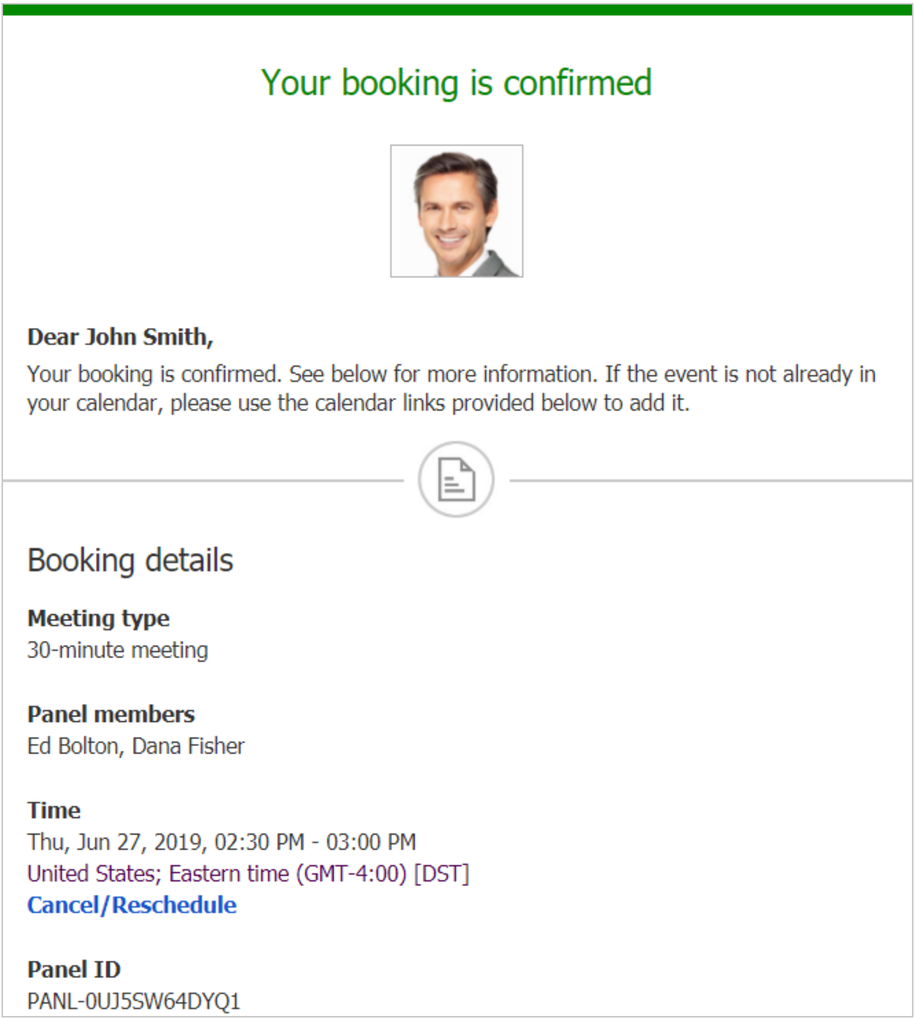


Figure 1: Booking confirmation email

2. The Cancel/reschedule page will open.
3. In the **Cancel** tab, the Customer clicks the **Cancel the booking** button (Figure 2). Depending on your Cancel/reschedule policy, the Customer can be asked to provide a reason for canceling.

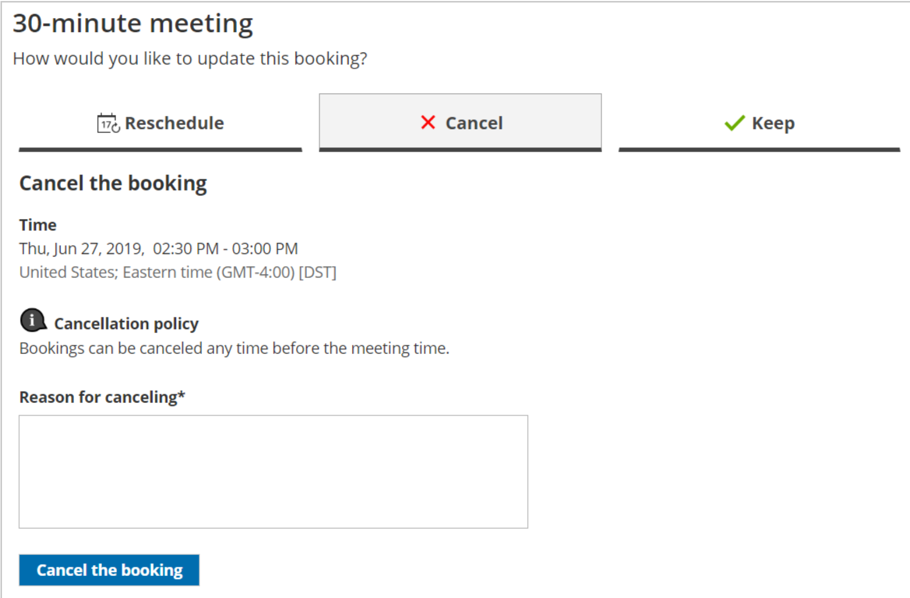


Figure 2: Cancel tab

4. When a Customer cancels a Panel meeting, the following actions take place:
   - The Customer receives a cancellation email notification.
   - The Primary team member receives a cancellation email notification and all Additional team members are cc'd in this email.
   - If the Primary team member is connected to a calendar, the event is automatically cancelled.
   - All panelists see the cancelled activity status and details for the activity in their Activity stream.

Note:

When you use Payment integration, you can enable automatic refunds when Customers cancel a Panel meeting. Learn more about enabling automatic refunds

Customer Action: Reschedule a Panel meeting

Last Modified on Jun 27, 2019

Whether or not a Customer can reschedule a Panel meeting is subject to the Cancel/reschedule policy you've set on your Booking page or Event type. The Reschedule policy only applies to scheduled bookings and rescheduled Panel meetings are always made with the original panelists and Event type.

In this article, you'll learn about the steps that a Customer takes to reschedule a Panel meeting.

How Customers reschedule Panel meetings

1. The Customer clicks the **Cancel/Reschedule** link in the scheduling email notification (Figure 1) or in the calendar event.

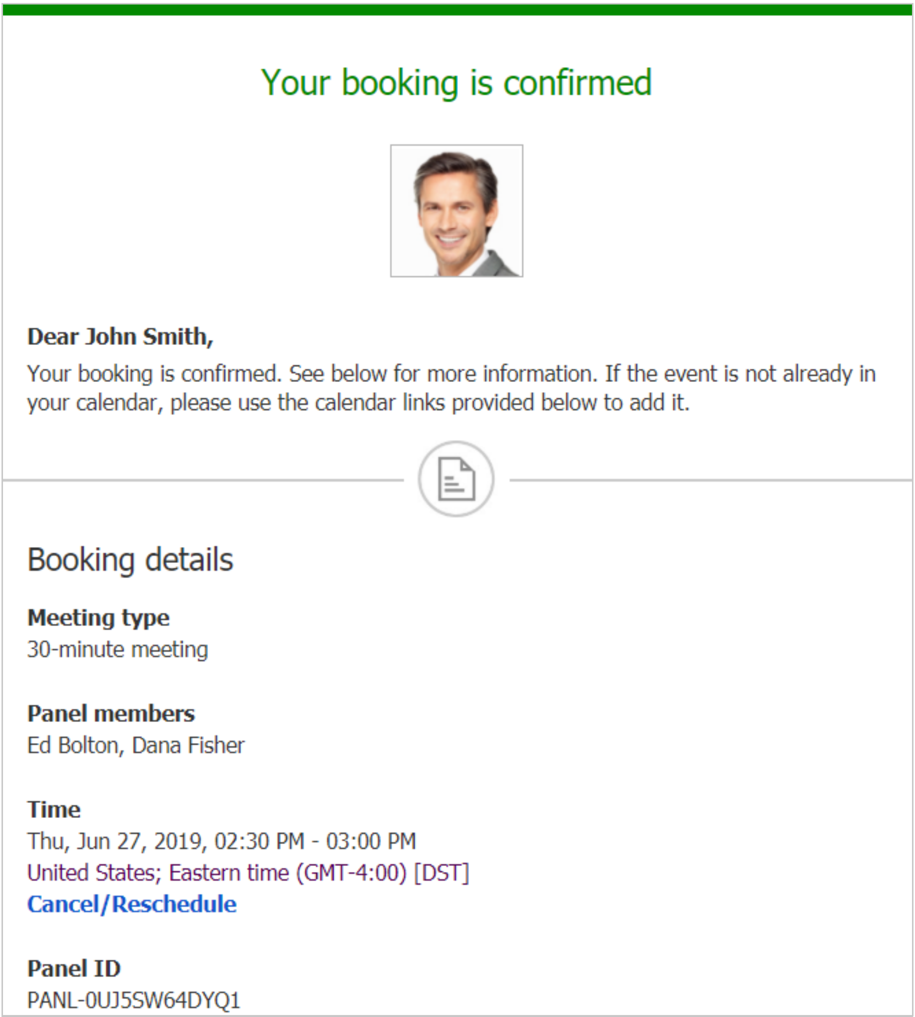


Figure 1: Booking confirmation email

2. The Cancel/reschedule page will open.
3. In the **Reschedule** tab, the Customer clicks the **See available times** button (Figure 2).

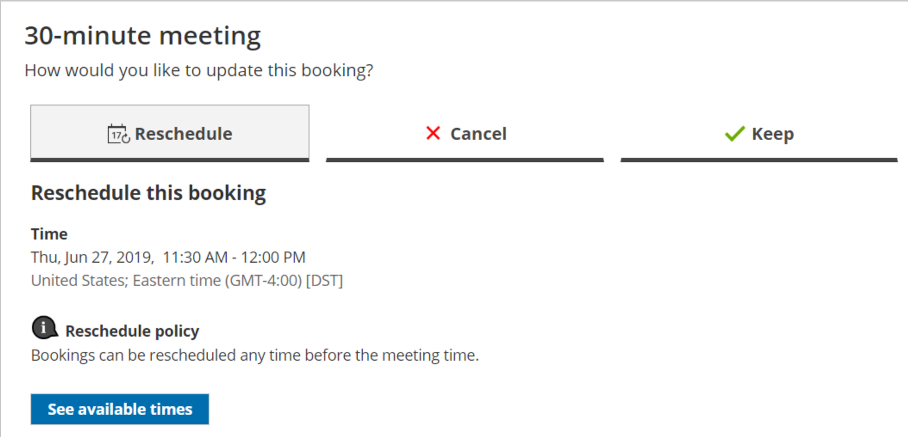


Figure 2: Reschedule tab

4. The Customer then selects a new date and time.
5. If your Cancel/reschedule policy asks for a reschedule reason, the Customer will be prompted to provide one.
6. The Booking form step is skipped since all the required information was already provided by the Customer when they made the booking.
7. When a Customer reschedules a Panel meeting, the following actions take place:

   - The Customer receives an email notification with details about their rescheduled Panel meeting.
   - The Primary team member receives an email notification with details about the rescheduled booking details. All Additional team members are cc'd in this email.
   - If the Primary team member is connected to a calendar, the calendar event will be automatically updated to reflect the new times.
   - All panelists see the updated activity status and details in their Activity stream.

Note:

If you use Payment integration, you can charge Customers a reschedule fee when they reschedule a booking. This enables you to generate an additional revenue stream and reduces unnecessary rescheduling activity.

User action: Cancel/request to reschedule for Booking pages with Event types

Last Modified on Jun 5, 2023

When the activity status of a booking is **Scheduled**, **Rescheduled**, **No-show**, or **Completed**, the User can request to cancel or reschedule a booking directly from the Activity stream.

> **Note:**
>
> You can cancel or reschedule directly from your calendar if you have connected your OnceHub Account to Google Calendar or Exchange/Outlook Calendar.
>
> Learn more about calendar connection

In this article, you'll learn how to cancel or request reschedule directly from the Activity stream when you use Booking pages associated with Event types.

Effects of canceling or rescheduling

When you request to reschedule from the Activity stream, the booking is canceled and a reschedule request email notification is sent to both the User and the Customer. To reschedule, the Customer clicks the **Reschedule now** button directly from the email notification, or the **Customer's cancel/reschedule link** in the calendar event. Learn more about the effects of rescheduling

When you cancel a booking from the Activity stream, a cancellation email notification is sent to both the User and the Customer.

Learn more about the effects of cancellation

Requirements

To cancel a booking or request to reschedule from the Activity stream, you must be the Owner, an Editor, or Viewer of the Booking page that the booking was made on.

Rescheduling a booking made on a Booking page with Event types

1. Select the activity in the Activity stream.
2. In the **Details** pane, click the **Cancel/request reschedule** link (Figure 1).

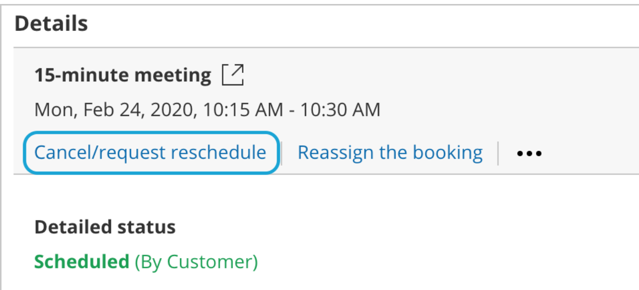


Figure 1: Cancel/request reschedule button

3. The **Cancel/request reschedule** pop-up will appear (Figure 2).

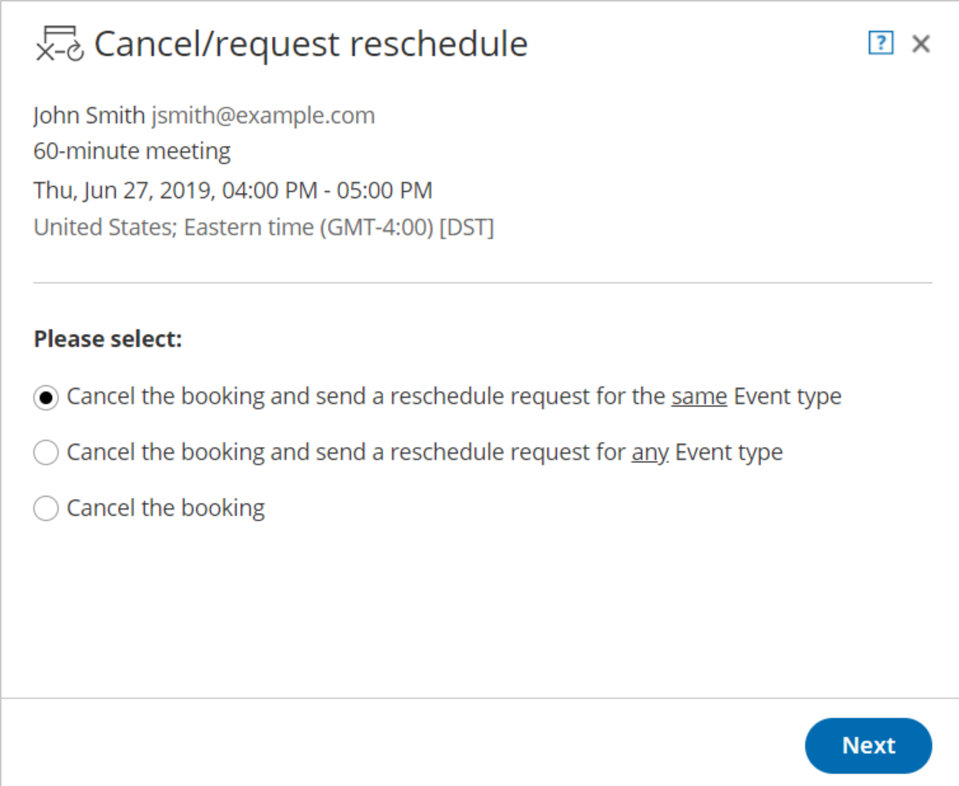


Figure 2: Cancel/request reschedule pop-up—Selection step

4. Select whether you want send a reschedule request for the same Event type, or a reschedule request for any Event type.
    - **Cancel the booking and request reschedule for the same Event type:** The Customer will only be able to reschedule with the same Event type that they originally booked on your Booking page or Master page. If you use Payment integration, the Customer will not be asked to pay any reschedule fee. The payment data will be reassigned from the cancelled booking to the rescheduled booking in the Activity stream after the Customer reschedules.
    - **Cancel the booking and request reschedule for any Event type:** The Customer will be able to reschedule with any Event type on your Booking page or Master page. If you use Payment integration, the original booking is canceled and refunded. The Customer will be asked to pay the full Event type price when rescheduling, as if it was a new booking.
5. Click **Next**.
6. In the **Notification** step, you can add a reschedule reason that will be provided to the Customer.
7. Click **Next**.
8. In the **Review** step (Figure 3), you can confirm the details of the booking that you're about to cancel and request that the Customer reschedules.

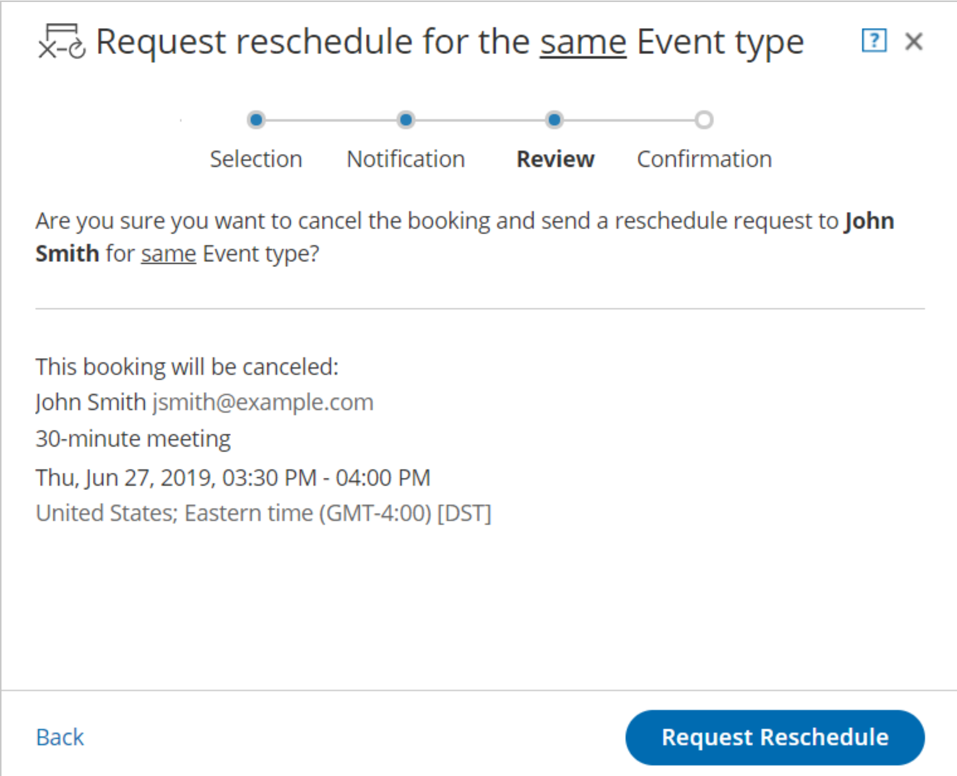


Figure 3: Cancel/request reschedule pop-up—Review step

9. Click **Request reschedule**.
10. The original booking will be canceled and the Customer will receive an email notification to reschedule. The Booking page Owner and any additional stakeholders with also receive an email notification. Learn more about notification scenarios

> **Note:**
>
> You can always decide to change your selection by clicking **Back** at any step of the Cancel/request new times process.
>
> To confirm the action, you must click the **Request reschedule** in the last step of the pop-up.

Canceling a booking made on a Booking page with Event types

1. Select the activity in the Activity stream.
2. In the **Details** pane, click the **Cancel/request reschedule** link (Figure 4).

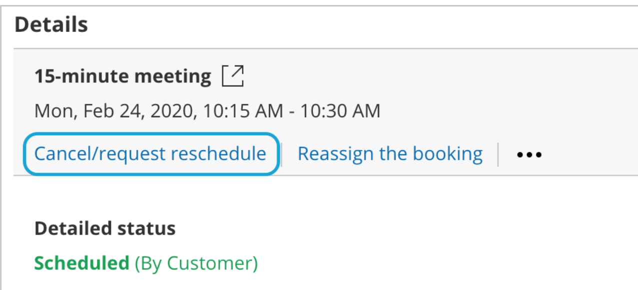


Figure 4: Cancel/request reschedule button

3. The **Cancel/request reschedule** pop-up will appear.

4. Select **Cancel the booking** (Figure 5).

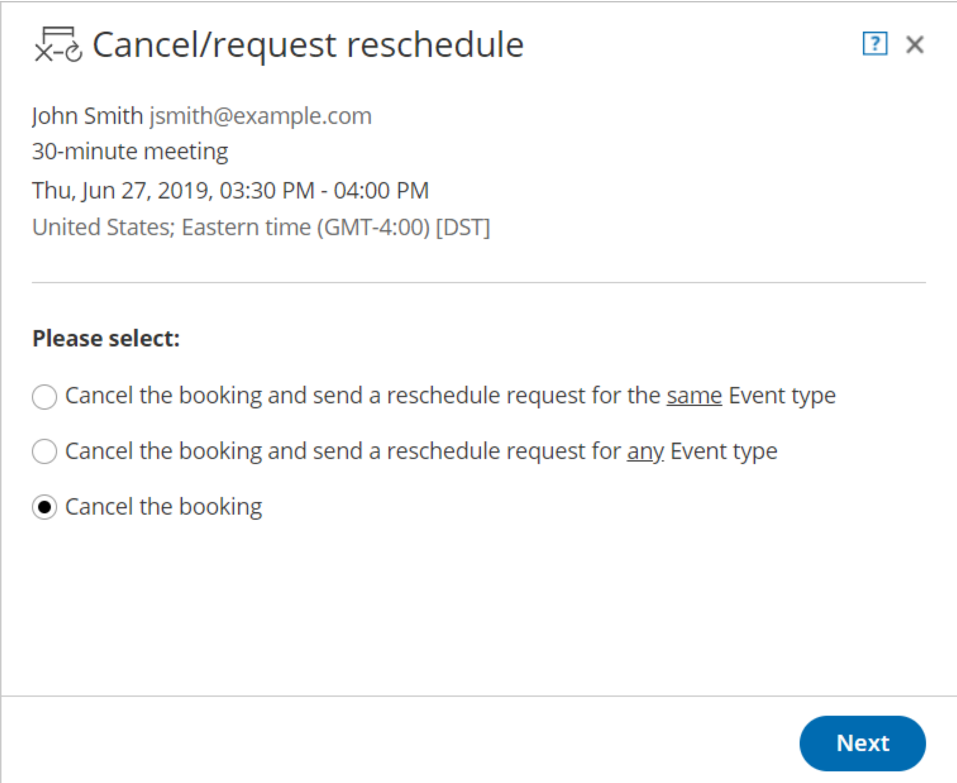


Figure 5: Cancel/request reschedule pop-up—Selection step

5. Click **Next**.
6. In the **Notification** step, you can add a cancellation reason that will be provided to the Customer.
7. Click **Next**.
8. In the **Review** step, you can confirm the details of the booking that you're about to cancel.
9. Click **Cancel booking**.

> **Note:**
>
> When using Payment integration, refunds can be processed manually via OnceHub. In this case, manual refunds can be processed directly from the **Cancel/request reschedule** pop-up in the **Refund** step.

10. The original booking will be canceled and the Customer will receive an email notification, along with the Booking page Owner and any additional stakeholders. Learn more about notification scenarios

> **Note:**
>
> You can always decide to change your selection by clicking **Back** at any step of the Cancel/request new times process.
>
> To confirm the action, you must click the **Cancel booking** in the last step of the pop-up.

User action: Cancel/request to reschedule for Booking pages without Event types

Last Modified on Feb 20, 2022

Tip:

We recommend using Event types with your Booking pages. Event types allow you to offer several meeting types with different durations, price, and other properties.

When the activity status of a booking is **Scheduled**, **Rescheduled**, **No-show**, or **Completed**, the User can request to cancel or reschedule a booking directly from the Activity stream.

Note:

You can cancel or reschedule directly from your calendar if you have connected your OnceHub Account to Google Calendar or Exchange/Outlook Calendar.

Learn more about calendar connection

In this article, you'll learn how to cancel or request reschedule directly from the Activity stream when you use Booking pages which are not associated with Event types.

Effects of canceling or rescheduling

When you request to reschedule from the Activity stream, the booking is canceled and a reschedule request email notification is sent to both the User and the Customer. To reschedule, the Customer clicks the **Reschedule now** button directly from the email notification, or the **Customer's cancel/reschedule link** in the calendar event. Learn more about the effects of rescheduling

When you cancel a booking from the Activity stream, a cancellation email notification is sent to both the User and the Customer.

Learn more about the effects of cancellation

Requirements

To cancel a booking or request to reschedule from the Activity stream, you must be the Owner, an Editor, or Viewer of the Booking page that the booking was made on.

Rescheduling a booking made on a Booking page without Event types

1. Select the activity in the Activity stream.
2. In the **Details** pane, select **Cancel/request reschedule**. (Figure 1).

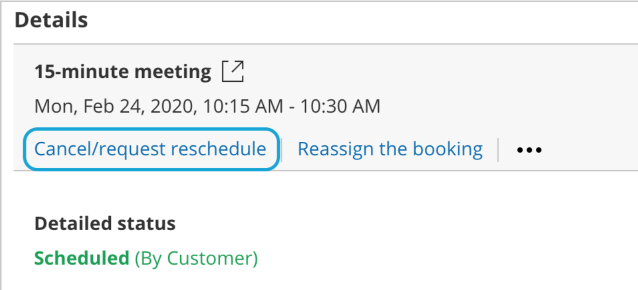


Figure 1: Cancel/request reschedule button

3. The **Cancel/request reschedule** pop-up will appear (Figure 2).

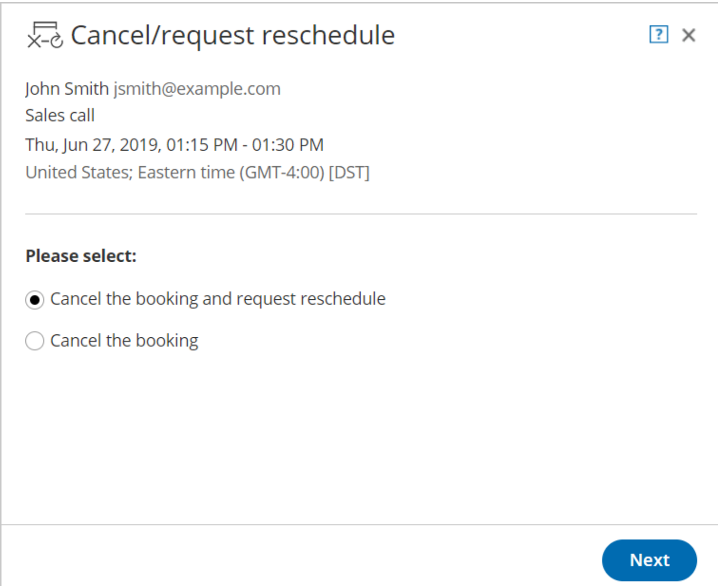


Figure 2: Cancel/request new times pop-up

4. Select **Cancel the booking and request reschedule**.
5. Click **Next**.
6. In the **Notification** step, you can add a reschedule reason that will be provided to the Customer.
7. Click **Next**.
8. In the **Review** step (Figure 3), you can confirm the details of the booking that you're about to cancel and request that the Customer reschedules.

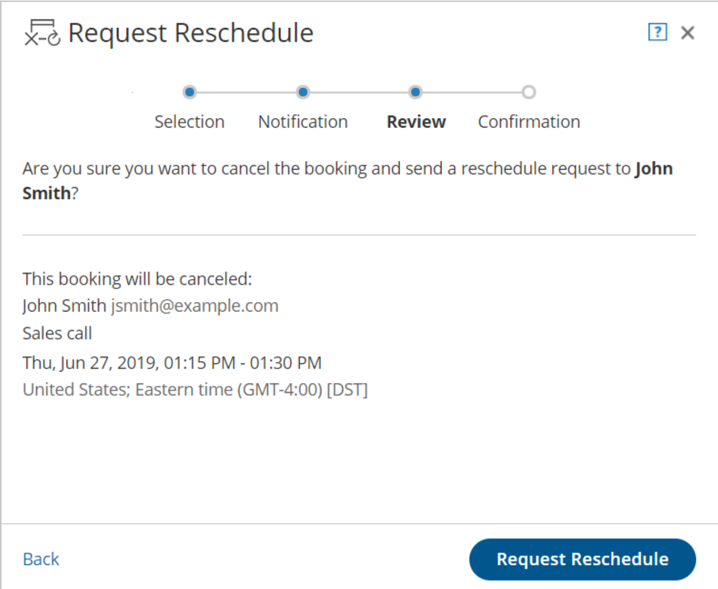


Figure 3: Cancel/request reschedule pop-up—Review step

9. Click **Request reschedule**.
10. The original booking will be canceled and the Customer will receive an email notification to reschedule. The Booking page Owner and any additional stakeholders with also receive an email notification. Learn more about notification scenarios

Note:

You can always decide to change your selection by clicking **Back** at any step of the Cancel/request new times process.

To confirm the action, you must click the **Request reschedule** in the last step of the pop-up.

Canceling a booking made on a Booking page without Event types

1. Select the activity in the Activity stream.
2. In the **Details** pane, click the **Cancel/request reschedule** button (Figure 4).

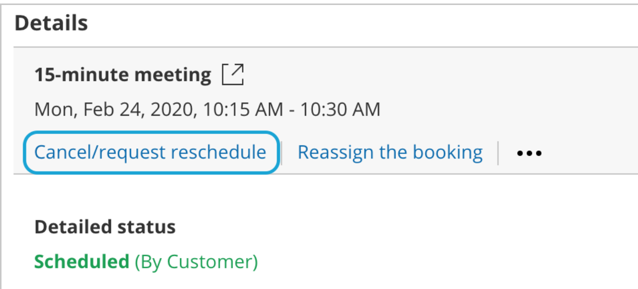


Figure 4: Cancel/request new times button

3. The **Cancel/request reschedule** pop-up will appear.
4. From the **Cancel/request reschedule** pop-up, select **Cancel the booking** (Figure 5).

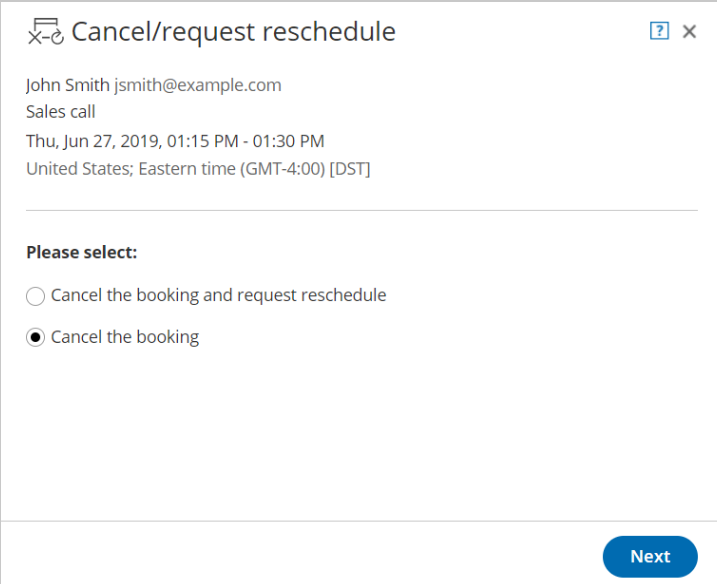


Figure 5: Cancel/request reschedule pop-up

5. Click **Next**.
6. In the **Notification** step, you can add a cancellation reason that will be provided to the Customer.
7. Click **Next**.
8. In the **Review** step, you can confirm the details of the booking that you're about to cancel.
9. Click **Cancel booking**.
10. The original booking will be canceled and the Customer will receive an email notification, along with the Booking page Owner and any additional stakeholders. Learn more about notification scenarios

Note:

You can always decide to change your selection by clicking **Back** at any step of the Cancel/request new times process.

To confirm the action, you must click the **Cancel Booking** in the last step of the pop-up.

User Action: Cancel a Panel meeting

Last Modified on Jun 5, 2023

When the activity status of a Panel meeting is **Scheduled**, **Rescheduled**, **No-show**, or **Completed**, the User can cancel the Panel meeting directly from the Activity stream.

When you cancel a Panel meeting, it affects all panelists and the Customer.

Requirements

Any User who can see a Panel meeting activity in their Activity stream can cancel a Panel meeting.

Canceling a Panel meeting

1. Select the Panel meeting activity in the Activity stream.
2. In the **Details** pane, click the **Cancel/request reschedule** button (Figure 1).

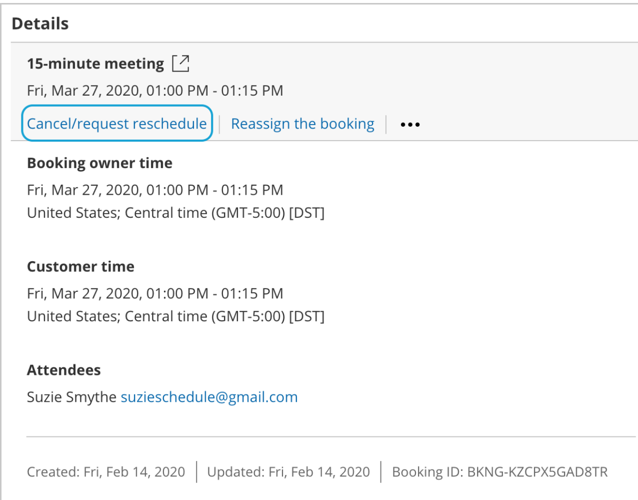


Figure 1: Cancel/request reschedule button

3. The **Cancel/request reschedule** pop-up will appear (Figure 2). Select **Cancel the booking.**
4. Click **Next**.
5. In the **Notification** step, you can add a cancellation reason that will be provided to the Customer.
6. Click **Next**.
7. In the **Review** step (Figure 3), you can confirm the details of the Panel meeting that you're about to cancel.

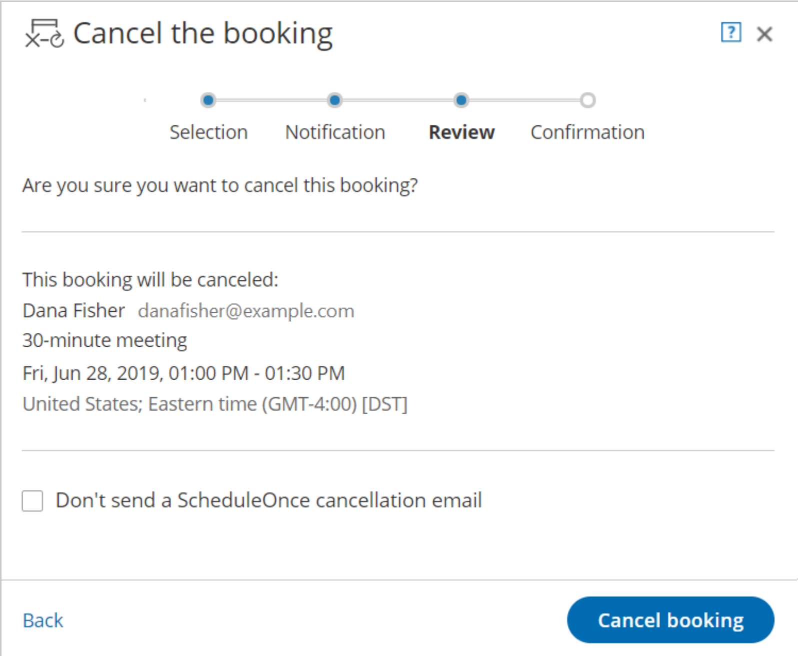


Figure 3: Cancel/request reschedule pop-up—Review step

8. By default, a cancellation email is always sent to your Customer. If you do not want to send a cancellation email to the Customer, check the **Don't send a OnceHub cancellation email** box.
9. Click **Cancel booking**. When a User cancels a Panel meeting, everyone involved is affected:
   - By default, the Customer receives a cancellation email notification.
   - The Primary team member receives a cancellation email notification and all Additional team members are cc'd in this email.
   - The activity status is updated to Cancelled in the Activity stream for all panelists.
   - If the Primary team member is connected to a calendar, the calendar event will automatically be cancelled.

Note:

You can cancel or reschedule directly from your calendar if the Primary team member's OnceHub account is connected to Google Calendar, Exchange Calendar, or Outlook Calendar via the PC connector for Outlook.

User Action: Request to reschedule a Panel meeting

Last Modified on Jul 9, 2020

When the activity status of a Panel meeting is **Scheduled**, **Rescheduled**, **No-show**, or **Completed**, the User can request to reschedule the Panel meeting directly from the Activity stream.

When you request a reschedule, the original Panel meeting is canceled for all panelists and a request to reschedule for a new time is sent to the Customer. If the Customer reschedules, the rescheduled meeting is always with the original panelists and Event type.

In this article, you'll learn how to request to reschedule a Panel meeting directly from the Activity stream.

Requirements

Any User who can see a Panel meeting activity in their Activity stream can request that a Customer reschedules.

Requesting to reschedule a Panel meeting

1. Select the Panel meeting activity in the Activity stream.
2. In the **Details** pane, click the **Cancel/request reschedule** button (Figure 1).

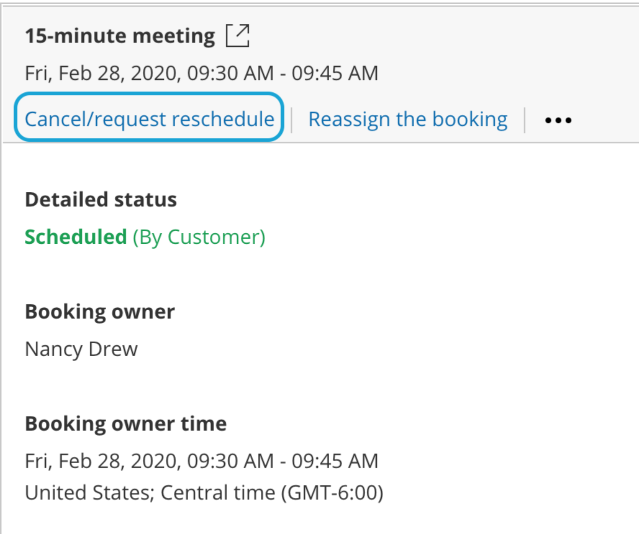


Figure 1: Cancel/request new times button

3. The Cancel/request reschedule pop-up appears (Figure 2). Select **Cancel the booking and send a reschedule request for the same Event type.**

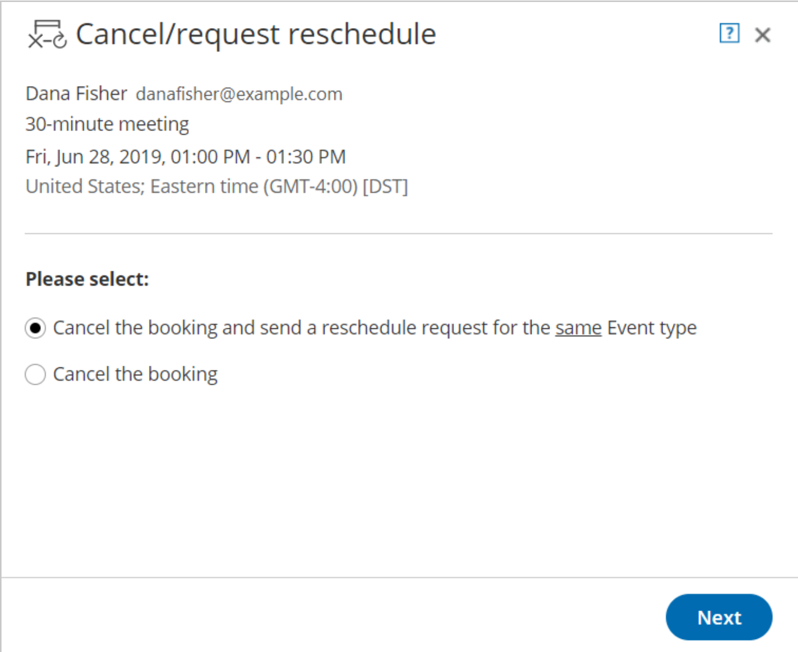


Figure 2: Cancel/request reschedule pop-up—Selection step

4. Click **Next**.
5. In the **Notification** step, you can add a reschedule reason that will be provided to the Customer.
6. Click **Next**.
7. In the **Review** step (Figure 3), you can confirm the details of the booking that you're about to cancel and request that the Customer reschedules.

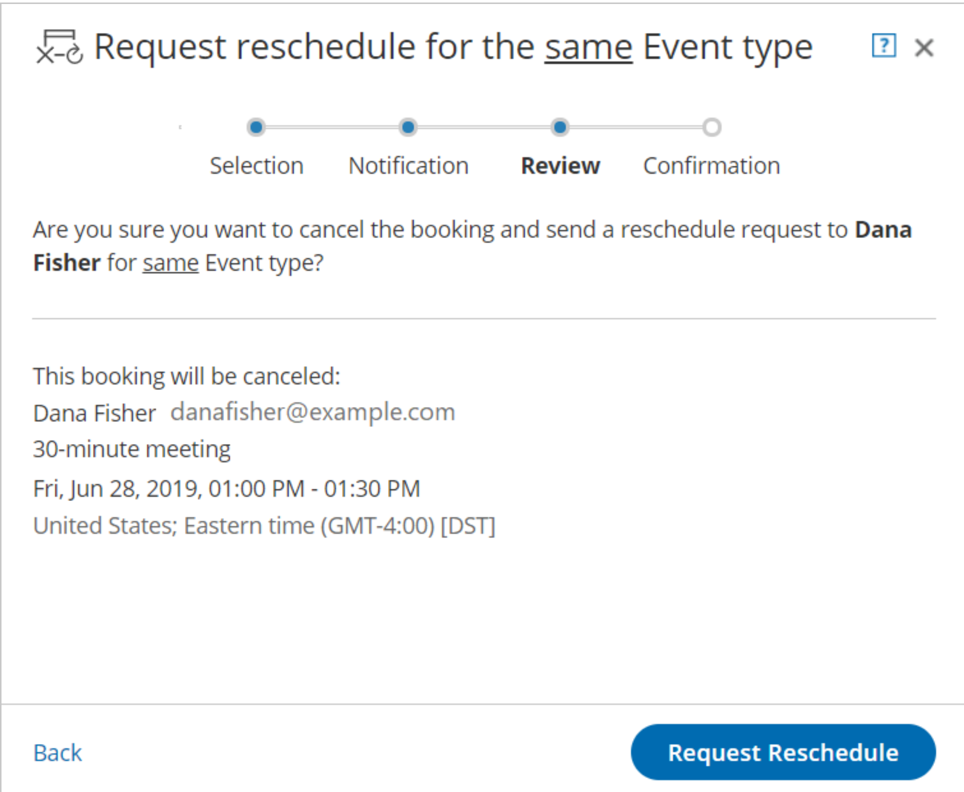


Figure 3: Cancel/request reschedule pop-up—Review step

8. Click **Request reschedule**.
9. When a User requests to reschedule a Panel meeting, the following occurs:

- The original booking is canceled and the Customer will receive an email notification asking them to reschedule.
- The Primary team member receives an email notifying them of the reschedule request and all Additional team members are cc'd in this email.
- If the Primary team member is connected to a calendar, the event will be automatically cancelled.
- In the Activity stream, the activity status is changed to Canceled (Reschedule requested by User) for all panelists.

Note:

When using Payment integration and the User requests a reschedule for any Event type, the original booking is canceled and refunded. The Customer will not be asked to pay a Reschedule fee for rescheduling. The Customer will be asked to pay the full Event type price when rescheduling, as if it was a new Booking.

User action: Cancel or reschedule in Google Calendar

Last Modified on Jan 7, 2024

When you're connected to a Google Calendar, you can select whether changes made in your connected calendar are reflected in OnceHub .

In this article, you'll learn about canceling and rescheduling from your Google Calendar.

Adjusting OnceHub advanced integration settings

Open OnceHub and click on your profile image or initials in the top right corner and select **Calendar connection**.

Under the **OnceHub advanced integration settings** heading, you'll see two toggles (Figure 1). These control how your Google Calendar two-way sync will function. By default, both toggles are set to **OFF**.

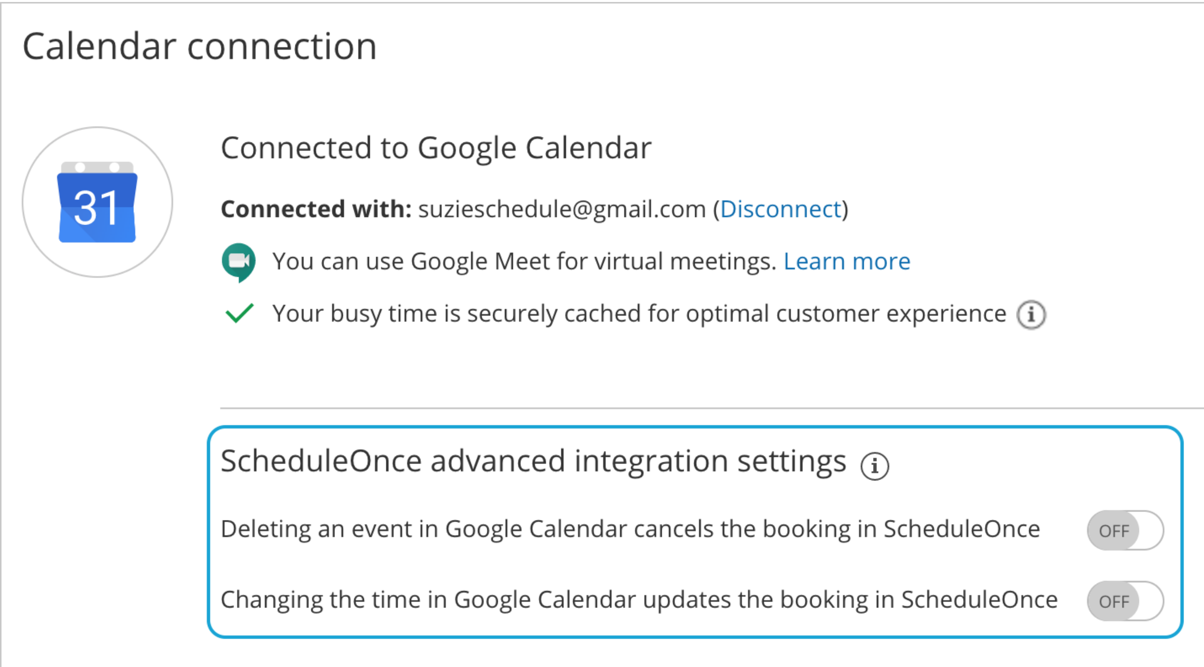


Figure 1: Calendar connection—OnceHub advanced integration settings

Canceling an event in your connected Google Calendar

If you delete a calendar event created by a OnceHub booking while the **Deleting an event in Google Calendar cancels the booking in OnceHub** toggle is set to **ON**, the booking will be automatically canceled in OnceHub. The following actions are performed, as if you (the User) canceled the booking in OnceHub:

- Your Customer receives a cancellation notification.
- The event is deleted from your calendar, and the time is set to available.
- If you are using any other integrations (like CRM, video conferencing or Zapier) – they are updated with the cancellation.
- If you are using Payment integration, no refund is issued. If your Customer is entitled to a refund, you can refund them manually via OnceHub or via PayPal.

If you delete a calendar event created by a OnceHub booking while the first toggle is set to **OFF**, the booking remains unchanged in OnceHub, no email notifications are sent, and no integrations are updated.

Note:

In cases of Panel meetings, if the Primary team member deletes the calendar event, the booking is automatically canceled in OnceHub for all Panel members. That means for both the Primary team member and all Additional team members.

Rescheduling an event in your connected Google Calendar

The **Changing the time in Google Calendar updates the booking in OnceHub** option determines how OnceHub is updated with the new time of the event. When you move a booking in your connected calendar, you're actually rescheduling on behalf of your Customer. Therefore, the time change must be coordinated with your Customer. No email notifications are sent to you or your Customer.

Note:

The reschedule functionality will only work when events are modified in the same calendar. Modifications in Additional booking calendars are disregarded.

When you move an event in your calendar while the second toggle is set to **ON**, the following actions are performed:

- The OnceHub booking time is updated immediately.
- All reminders are sent on schedule.
- All integrations (CRM, video conferencing, Zapier, and payment) are updated as well.
- The status of future events is changed to "Rescheduled".

If the second toggle is set to **OFF**, the OnceHub booking time is only updated when the next reminder is due, subsequent reminders are sent on schedule and Integrations are not updated.

Note:

In cases of a Panel meeting, if the Primary team member moves or delete a booking in their connected calendar, the booking is automatically rescheduled or canceled for all panel members. That means for both the Primary team member and all Additional team members.

The Customer calendar event

Whether your Customer's calendar will be updated or not depends on your choice in Google's **Would you like to send update emails to existing Google Calendar guests** pop-up. Make sure to click the **Send** button, so that your Customer's calendar is updated. Learn more about the Customer's calendar event

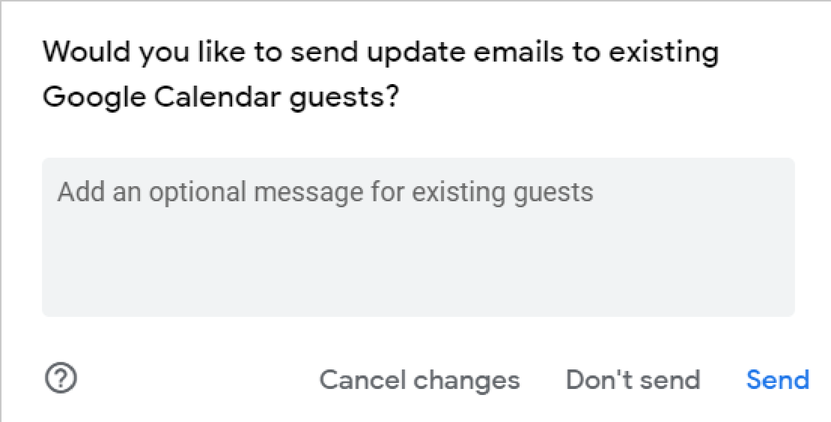


Figure 2: Send updates to Calendar guests

User action: Cancel or reschedule when connected via the PC connector for Outlook

Last Modified on Jun 5, 2023

When you're connected to an Outlook Calendar via the PC connector for Outlook, you can select whether changes made in your connected calendar are reflected in OnceHub.

Note:

This article only applies to calendar actions done by Users while connected to Outlook Calendar via the PC connector for Outlook. It does not apply to other calendars integrations, or to any calendar action done by the Customer.

In this article, you'll learn how about cancelling and rescheduling in your Outlook calendar

Adjusting the Outlook Calendar action settings

Log into OnceHub and go to **Setup** -> **OnceHub setup** -> Lefthand sidebar -> **Integrations** -> Calendar integration.

Under the **Outlook Calendar actions** heading, you'll see two checkboxes (Figure 1). These control how the Outlook Calendar two-way sync will function. By default, both are unchecked.

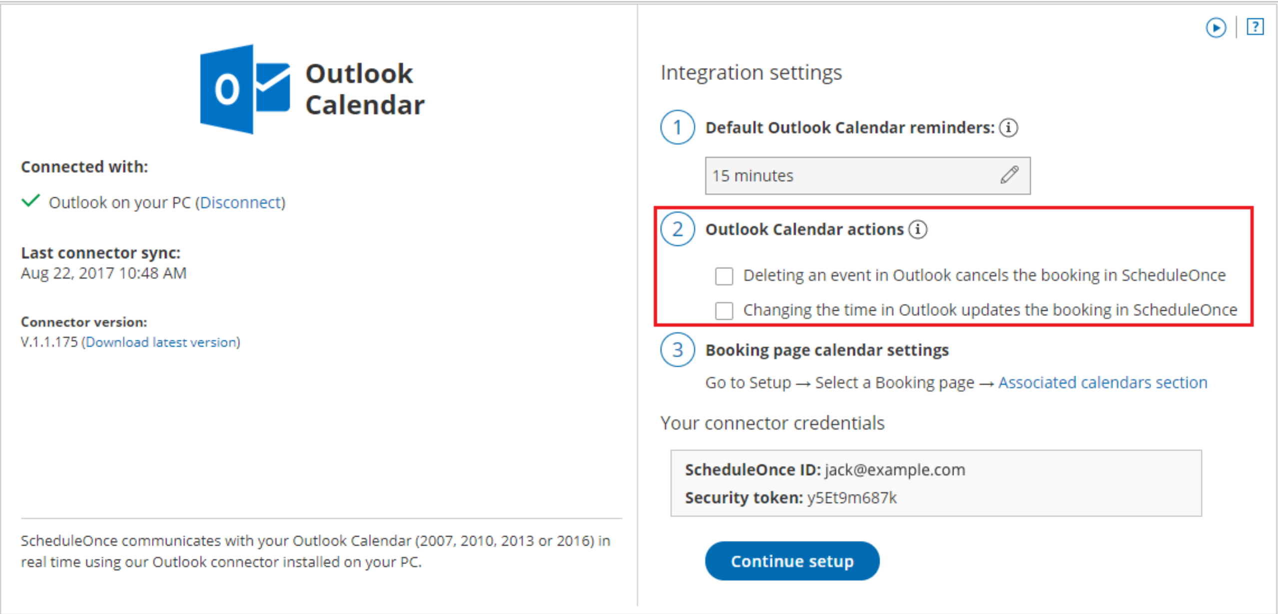


Figure 1: Outlook Calendar integration settings

Cancelling an event in your connected Outlook Calendar

If you delete a calendar event created by a OnceHub booking while the **Deleting an event in Outlook cancels the booking in OnceHub** box is checked, the booking will automatically be canceled in OnceHub.

When you delete an event in your calendar, the following actions are performed as if you (the User) canceled the booking in OnceHub:

- Your Customer receives a cancellation notification.
- The event is deleted from your calendar, and the time is set to Free.
- If you're using any other integrations (like CRM, video conferencing or Zapier), they are updated with the cancellation.
- If you are using Payment integration, no refund is issued. If your Customer is entitled to a refund, you can refund them

manually via OnceHub or via PayPal.

Note:

In cases of a Panel meetings, if the Primary team member deletes the calendar event, the booking is automatically canceled in OnceHub for all Panel members. That means for both the Primary team member and all Additional team members.

If you delete a calendar event created by a OnceHub booking while this box is **unchecked,** the booking remains unchanged in OnceHub, no email notifications are sent and integrations are not updated.

Rescheduling an event in your connected Outlook Calendar

The **Changing the time in Outlook updates the booking in OnceHub** option determines how OnceHub is updated with the new time of the event. When you move a booking in your connected calendar, you're actually rescheduling on behalf of your Customer. Therefore, the time change must be coordinated with your Customer. No email notifications are sent to you or your Customer.

Note:

The reschedule functionality will only work when events are modified in the same calendar. Modifications in Additional booking calendars are disregarded.

When you move an event in your calendar while this box is checked, the following actions are performed:

- The OnceHub booking time is updated immediately.
- All reminders are sent on schedule.
- All integrations (CRM, video conferencing, Zapier, and payment) are updated as well.
- The status of future events is changed to **Rescheduled**.

If you move a calendar event created by a OnceHub booking while this box is **unchecked**, the OnceHub booking time is only updated when the next reminder is due, subsequent reminders are sent on schedule and integrations are not updated.

Note:

In cases of Panel meetings, if the Primary team member moves a booking in their connected calendar, the booking is automatically rescheduled for all panel members. That means for both the Primary team member and all Additional team members.

The Customer calendar event

Whether or not your Customer's calendar will be updated is based on your choice in Outlook's event update dialog box. Make sure to select **Save changes and send update** or **Send cancellation**, so that your Customer's calendar is updated. Learn more about the Customer's calendar event

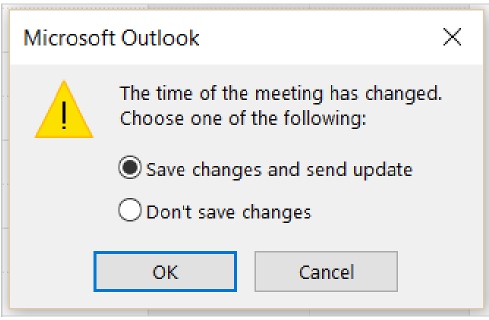


Figure 2: Send update to Customer

User action: Cancel or reschedule in Office 365 Calendar

Last Modified on Oct 5, 2023

OnceHub communicates with your Office 365 Calendar using secure methods. All credentials and data traffic are fully encrypted. Learn more about how your sign-in credentials are stored and protected by OnceHub

In this article, you'll learn about canceling and rescheduling from your Office 365 Calendar.

Adjusting OnceHub advanced integration settings

Open OnceHub and click on your profile image or initials in the top right corner and select **Calendar connection**.

Under the **OnceHub advanced integration settings** heading, you will see two toggles (Figure 1). These control how the Office 365 Calendar two-way sync will function. By default, both toggles are set to **OFF**.

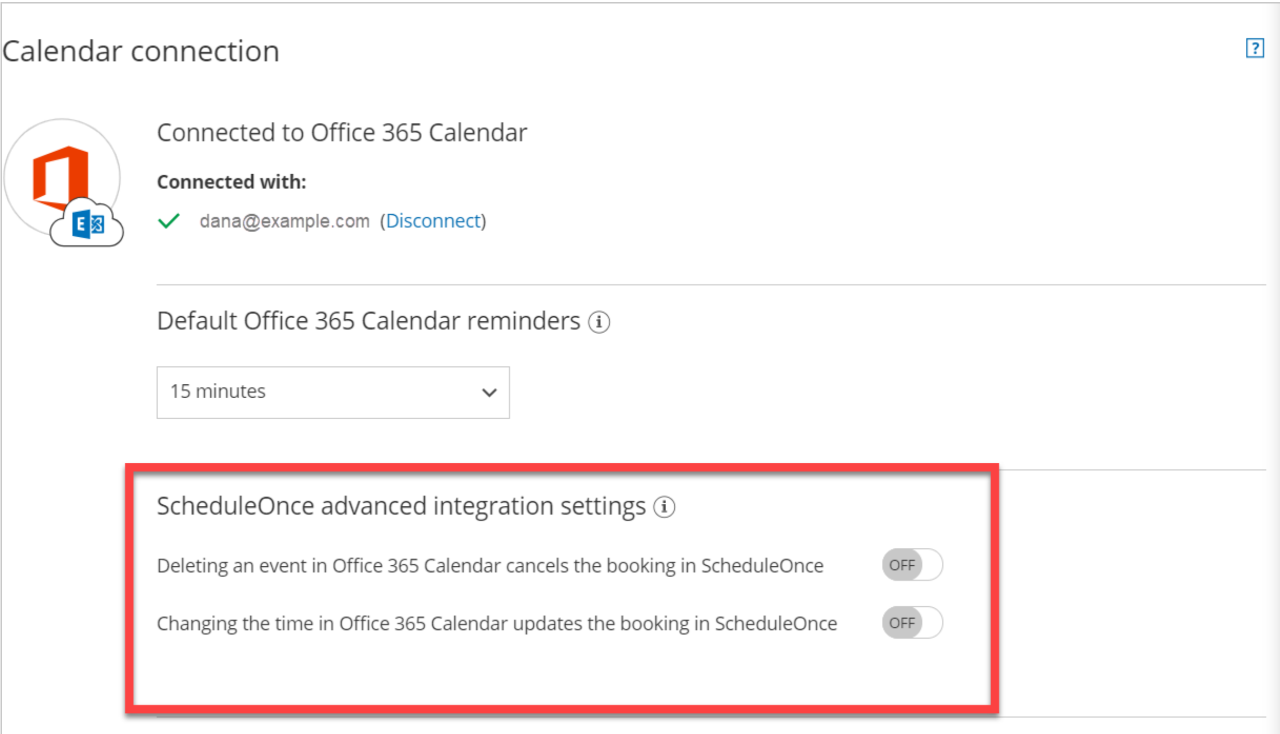


Figure 1: Calendar connection—OnceHub advanced integration settings

Canceling an event in your connected Office 365 Calendar

If you delete a calendar event created by a OnceHub booking while the **Deleting an event in Office 365 Calendar cancels the booking in OnceHub** toggle is set to **ON**, the booking will be automatically canceled in OnceHub. The following actions are performed, as if you (the User) canceled the booking in OnceHub:

1. Your Customer receives a cancellation notification.
2. The event is deleted from your calendar, and the time is set to available.
3. If you're using any other integrations (like CRM, video conferencing, or Zapier), they are updated with the cancellation.
4. If you're using Payment integration, no refund is issued. If your Customer is entitled to a refund, you can refund them manually via OnceHub or via PayPal.

Note:

In cases of Panel meetings, if the Primary team member deletes the calendar event, the booking is automatically canceled in OnceHub for all Panel members. That means for both the Primary team member and all Additional team members.

If you delete a calendar event created by a OnceHub booking while the first toggle is set to **OFF** in the Office 365 Calendar integration settings above, the booking remains unchanged in OnceHub, no email notifications are sent, and no integrations are updated.

Reschedule in your connected Office 365 Calendar

The **Changing the time in Office 365 Calendar updates the booking in OnceHub** option determines how OnceHub is updated with the new time of the event. When you move a booking in your connected calendar, you're actually rescheduling on behalf of your Customer. Therefore, the time change must be coordinated with your Customer. No email notifications are sent to you or your Customer.

Note :

The reschedule functionality will only work when events are modified in the same calendar. Modifications in Additional booking calendars are disregarded.

When you move an event in your calendar while the second toggle is set to **ON**, the following actions are performed:

- The OnceHub booking time is updated immediately.
- All reminders are sent on schedule.
- All integrations (CRM, web conferencing, Zapier, and payment) are updated as well.
- The status of future events is changed to "Rescheduled".

If the second toggle is set to **OFF**, the OnceHub booking time is only updated when the next reminder is due, subsequent reminders are sent on schedule and integrations are not updated.

Note:

In cases of Panel meetings, if the Primary team member moves a booking in their connected calendar, the booking is automatically rescheduled for all Panel members. That means for both the Primary team member and all Additional team members.

User action: Cancel or reschedule in Exchange/Outlook Calendar

Last Modified on Jan 7, 2024

OnceHub communicates with your Exchange/Outlook Calendar using the Exchange Web Services (EWS) API, a well-established official Microsoft protocol. All credentials and data traffic are fully encrypted. Learn more about how your sign-in credentials are stored and protected by OnceHub

Once you have connected to your Exchange/Outlook Calendar, you can select whether changes made in your connected calendar are reflected in the OnceHub User app or not.

Note:

This article applies to calendar actions done by Users while connected to Exchange/Outlook Calendar. It does not apply to other calendar integrations, or to any calendar action done by the Customer.

In this article, you'll learn about cancelling and rescheduling from your Exchange/Outlook calendar.

Adjusting OnceHub advanced integration settings

Open OnceHub and click on your profile image or initials in the top right corner and select **Calendar connection**.

Under the **OnceHub advanced integration settings** heading, you will see two toggles (Figure 1). These control how the Exchange/Outlook Calendar two-way sync will function. By default, both toggles are set to **OFF**.

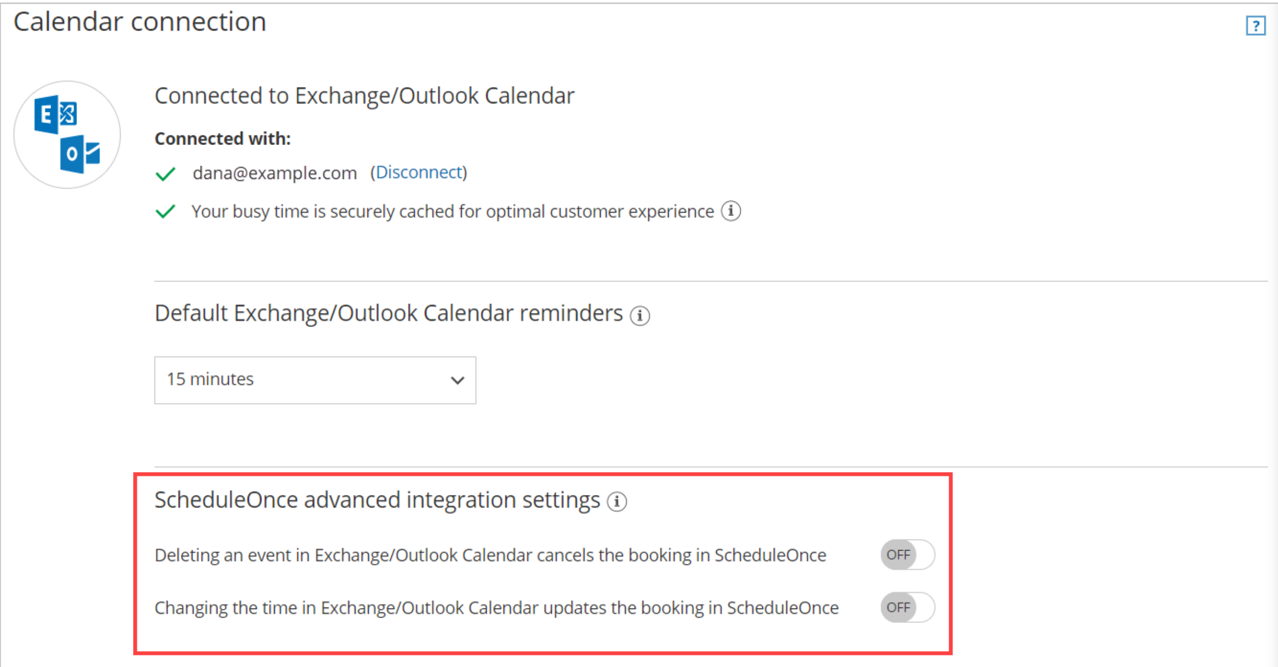


Figure 1: Calendar connection—OnceHub advanced integration settings

Canceling an event in your connected Exchange/Outlook Calendar

If you delete a calendar event created by a OnceHub booking while the **Deleting an event in Exchange/Outlook Calendar cancels the booking in OnceHub** toggle i set to **ON**, the booking will be automatically canceled in OnceHub . The following actions are performed, as if you (the User) canceled the booking in OnceHub:

- Your Customer receives a cancellation notification.
- The event is deleted from your calendar, and the time is set to available.
- If you're using any other integrations (like CRM, video conferencing, or Zapier), they are updated with the cancellation.
- If you're using Payment integration, no refund is issued. If your Customer is entitled to a refund, you can refund them manually via OnceHub or via PayPal.

> **Note:**
>
> In cases of Panel meetings, if the Primary team member deletes the calendar event, the booking is automatically canceled in OnceHub for all Panel members. That means for both the Primary team member and all Additional team members.

If you delete a calendar event created by a OnceHub booking while the first toggle is set to **OFF** in the Exchange/Outlook Calendar integration settings above, the booking remains unchanged in OnceHub , no email notifications are sent, and no integrations are updated.

Rescheduling an event in your connected Exchange/Outlook Calendar

The **Changing the time in Exchange/Outlook Calendar updates the booking in OnceHub** option determines how OnceHub is updated with the new time of the event. When you move a booking in your connected calendar, you're actually rescheduling on behalf of your Customer. Therefore, the time change must be coordinated with your Customer. No email notifications are sent to you or your Customer.

> **Note :**
>
> The reschedule functionality will only work when events are modified in the same calendar. Modifications in Additional booking calendars are disregarded.

When you move an event in your calendar while the second toggle is set to **ON**, the following actions are performed:

- The OnceHub booking time is updated immediately.
- All reminders are sent on schedule.
- All integrations (CRM, video conferencing, Zapier, and payment) are updated as well.
- The status of future events is changed to "Rescheduled".

If the second toggle is set to **OFF**, the OnceHub booking time is only updated when the next reminder is due, subsequent reminders are sent on schedule and integrations are not updated.

> **Note:**
>
> In cases of Panel meetings, if the Primary team member moves a booking in their connected calendar, the booking is automatically rescheduled for all Panel members. That means for both the Primary team member and all Additional team members.

Effects of rescheduling

Last Modified on Jun 5, 2023

In this article, you'll learn about the effects of rescheduling in different phases of the booking lifecycle. Learn more about the different activity statuses

Reschedule initiated by Customer

When a Customer submits a request to reschedule a booking, the following actions take place.

- **If the Customer reschedules using the same Booking page:** In the Activity stream, the original event is updated with the new time and a status of **Rescheduled (By Customer)**. In the calendar, the event is moved to the new date and time. There is no canceled activity and one calendar event is used for the entire booking lifecycle.

> **Note:**
>
> This does not apply to Booking pages in Group session mode integrated with Zoom, Google Meet, Microsoft Teams, GoToMeeting, or Webex Meetings. In this case, the original activity is updated with a status of **Canceled (By Customer)** and a new **Rescheduled** Activity is created.

- **If the Customer reschedules using a different Booking page:** In the Activity stream, the original activity is updated with a status of **Canceled (By Customer)**, a new **Rescheduled** Activity is created, and the **Stream** activity counter is incremented (Figure 1).

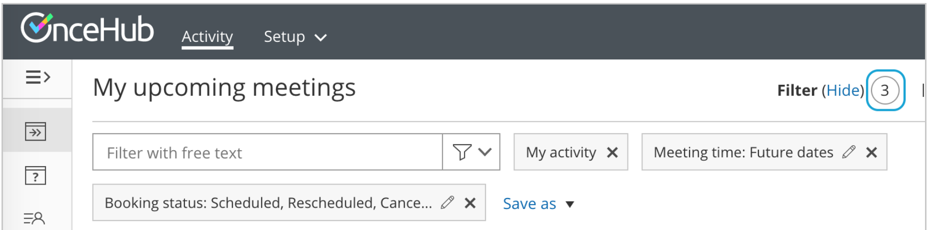


Figure 1: Stream activity counter

- An email notification with the new booking details is sent to the Customer, the User who the Customer made the booking with, and any additional stakeholders.
- The original User and any additional stakeholders are notified of the canceled booking and are informed of who the Customer reschedules with.
- The previously booked time slot is made available.

When using OnceHub with a connected calendar

- If the Customer is added to the original calendar event, the Customer will receive an updated calendar invite email with **CANCELED** in the title. The status of the calendar event will be automatically changed to "Free".
- The original User's calendar event changes its status to "Free". This frees up the slot to accept new bookings.
- The original calendar event includes **CANCELED** in the title, so that it's easy to spot that this booking was canceled. However, the calendar event is not deleted.

When using Payment integration

If you use Payment integration, payment can be collected automatically via OnceHub and the Customer can be charged a reschedule fee when rescheduling the booking. In this case, a **PAYMENT (RESCHEDULE)** Transaction is added to the

Activity stream.

Reschedule initiated by User

A User can reschedule a booking using either of the following methods.

1. Send the Customer a reschedule request asking them to reschedule the booking themselves.
2. Reschedule on behalf of the Customer directly in your connected Google Calendar or Exchange/Outlook Calendar.

When a reschedule request is sent by the User to the Customer, the following actions take place.

- The previously booked time slot becomes available.
- The User, any additional stakeholders, and the Customer receive an email notification with the reschedule request details.
- For Booking pages associated with Event types, the Customer will make a new booking for the same Event type or any Event type, depending on what the User specified in the **Cancel/request reschedule** pop-up.
- In the Activity stream, the original activity is updated with a **Canceled (Reschedule requested by User)** status.

When using OnceHub with a connected calendar

- The original calendar event includes **CANCELED** in the title, so that it's easy to spot that this booking was canceled. However, the calendar event is not deleted.
- The User's calendar event changes its status to "Free". This frees up the slot to accept new bookings.
- If the Customer was added to the original calendar event, the Customer will receive an updated calendar invite email with **CANCELED** in the title. The status of the calendar event will be automatically changed to "Free".

When using Payment integration

- When the User reschedules with the same Event type, the Customer will not be asked to pay a reschedule fee when rescheduling the booking.
- When the User reschedules with any Event type, payment can be collected automatically via OnceHub and the Customer can be charged for a reschedule fee when rescheduling the booking. In this case, a **PAYMENT (RESCHEDULE)** Transaction is added to the Activity stream.

Effects of cancellation

Last Modified on Jun 5, 2023

In this article, you'll learn about the effects of cancellation in different phases of the booking lifecycle. Learn more about the different activity statuses

Cancellation initiated by Customer

When a Customer cancels a booking, the following actions take place.

- An email notification is sent to the Customer, the User who the Customer made the booking with and any additional stakeholders to notify them of the cancellation.
- In the Activity stream, the activity is updated with a status of **Canceled (By Customer).**
- The previously-booked time slot becomes available.

When using OnceHub with a connected calendar

- If the Customer is added to the calendar event, the Customer will receive an updated calendar invite email with **CANCELED** in the title. The status of the calendar event will be automatically changed to "Free."
- The booking owner's calendar event includes **CANCELED** in the title, so that it is easy to spot that this booking was canceled. However, the calendar event is not deleted.
- The original User's calendar event changes its status to "Free". This frees up the slot to accept new bookings.

When using Payment integration

If you use Payment integration, refunds can be processed manually or automatically via OnceHub.

- If the Customer cancels the booking and refunds are processed automatically via OnceHub, an **AUTOMATIC REFUND (CANCELLATION)** refund transaction is added to the Activity stream.
- If the Customer cancels the booking and you manually process a refund via OnceHub, a **MANUAL REFUND VIA ONCEHUB** transaction is added to the Activity stream.

Learn more about processing refunds via OnceHub

Cancellation initiated by User

When a User cancels a booking, the following actions take place.

- An email notification is sent to the Customer, the User who the Customer made the booking with and any additional stakeholders to notify them of the cancellation.
- In the Activity stream, the original activity is updated with a status of **Canceled (By User).**
- The previously-booked time slot becomes available.

When using OnceHub with a connected calendar

- If the Customer is added to the calendar event, the Customer will receive an updated calendar invite email with

CANCELED in the title. The status of the calendar event will be automatically changed to "Free."

- The Booking owner's calendar event includes **CANCELED** in the title, so that it is easy to spot that this booking was canceled. However, the calendar event is not deleted.
- The Owner's calendar event changes its status to "Free". This frees up the slot to accept new bookings.

When using Payment integration

If you use Payment integration, refunds can be processed manually or automatically via OnceHub.

If the User cancels the booking and refunds are processed manually via OnceHub, a **MANUAL REFUND VIA ONCEHUB** transaction is added to the Activity stream.

Learn more about processing refunds via OnceHub

Canceling a booking request in Requested status

When a booking request in Requested status is canceled by a User or Customer, the following actions take place.

- An email notification is sent to the Customer, the User who the Customer made the booking with and any additional stakeholders to notify them of the cancellation.
- In the Activity stream, the canceled activity changes its status to **Canceled** and moves to the top of the list.

Ensuring that Customers reschedule with the same Booking page

Last Modified on Nov 26, 2019

If your Master page includes multiple Booking pages and associated Event types, you can define how bookings will be assigned during the scheduling process. You can decide whether or not a rescheduled booking is assigned to the same Team member originally assigned to it.

If you enable this option, the same Team member is responsible for the service provided to the Customer during the entire booking lifecycle, resulting in a smooth Customer experience.

In this article, you will learn how to ensure that Customers reschedule with the same Booking page.

Requirements

To enable this rescheduling option:

- You must be a OnceHub Administrator
- You must be working with Event types
- The Master page scenario must be Event types first, Booking pages first, or Rule-based assignment with Static rules

How to enable restricted rescheduling

During the rescheduling process, you have the option to limit rescheduling to the same Booking page that the Customer made the original booking with. To enable this restricted rescheduling option, use the following steps:

1. Go to **Booking pages** in the bar on the left.
2. Select the relevant Master page.
3. Select the **Assignment** section.
4. If your Master pages uses Rule based assignment with Static rules: in the **Distribution method** section, check the box marked **Rescheduling is only possible on the page on which the booking was made** (Figure 1).

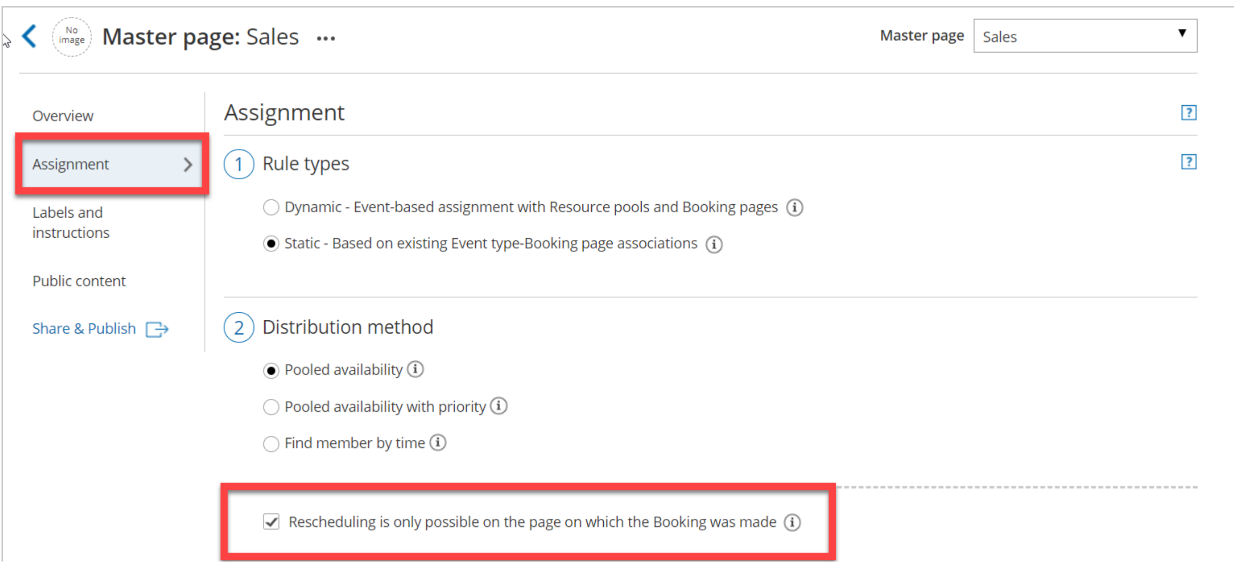


Figure 1: Limiting rescheduling on a Master page which uses Static rules

> **Note:**
>
> If a Master page is using Dynamic rules or Resource pools, then a Customer can only reschedule with the original Booking page.

5. If your Master pages uses Event types first or Booking pages first: in **Assignment upon reschedule** section, check the box marked **Reschedule is only possible on the page on which the booking was made** (Figure 2).

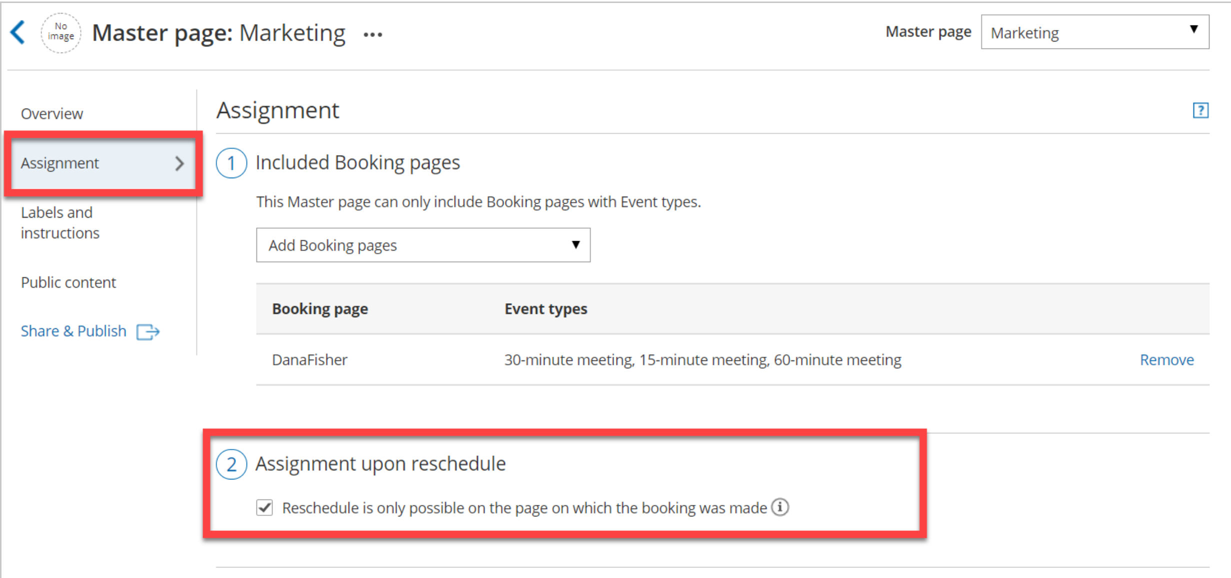


Figure 2: Limiting rescheduling on a Master page using Event types first or Booking pages first

6. Click **Save**.

Scheduling scenarios

When the Customer reschedules a booking while restricted rescheduling is enabled, they will be presented with the same Booking page that the original booking was made on. The reschedule option is available whether you work with Automatic mode or Booking with approval.

> **Note:**
>
> If the Booking page ownership has been changed, the Customer will see the updated Booking page, rather than the original one.

The reschedule option is applied to the following scheduling scenarios:

Customer reschedules a booking

The Customer clicks the Cancel/reschedule link from the booking confirmation notification and reschedules the booking.

- **If the Booking owner and Booking page owner are the same:** In the Activity stream, the original event is simply updated with the new time and moved in the calendar as a Rescheduled activity. There is no canceled activity and one calendar event is used for the entire booking lifecycle, keeping your records more consistent and efficient.
- **If the Booking owner and Booking page owner are different:** In the Activity stream, the original activity is

canceled and a new activity is created. Learn more about Booking reassignment

Learn more about rescheduling by a Customer

User sends a request to reschedule for the same Event type

In this case, the Customer clicks the **Reschedule now** button in the reschedule request email notification (Figure 3) and reschedules the booking. In the Activity stream, the original activity is canceled and a new activity is created when the Customer reschedules. Learn more about rescheduling by User with Event types

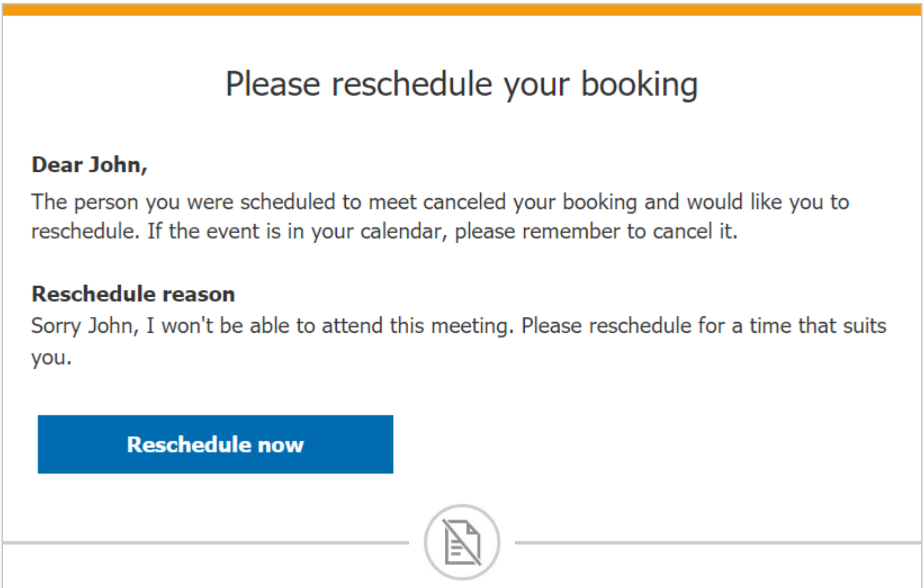


Figure 3: Reschedule request email notification to Customer

> **Important:**
>
> If the Booking page cannot accept bookings, the Customer will not be able to reschedule.

Introduction to Booking reassignment

Last Modified on Jul 16, 2020

Booking reassignment allows you to reassign bookings in your Activity stream from one Team member to another. This is useful in situations such as when a Team member is unavailable, or when a different Team member is better able to serve a specific Customer.

Calendar requirements

Booking reassignment is only available between Users who are both connected to Google Calendar, or Users who are both not connected to any calendar. Booking reassignment is not available for Users connected to other calendars.

Note:

You cannot reassign a booking from a User who is **not connected** to a calendar to a User who **is connected** to Google Calendar, and vice versa.

You can only reassign bookings between Users with similar calendar configurations. For example, you can reassign a booking from a User connected to Google Calendar to another User who is also connected to Google Calendar.

How to reassign a booking

To reassign a booking, select the activity you would like to reassign in the Activity stream. Then, in the **Details** pane, select **Reassign the booking** (Figure 1).

Learn more about reassigning a booking

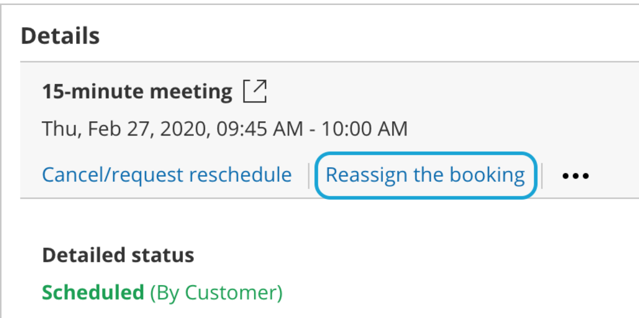


Figure 1: Reassign the booking

How does Booking reassignment work?

When a booking is reassigned, the experience is invisible to Customers. From your Customer's perspective, the event remains as originally scheduled. The Customer will receive notifications for the event as originally planned.

The original Booking owner, new Booking owner, and Booking page Editors will receive notifications regarding the reassignment. They will also have full permission to view and edit the booking from the Activity stream.

Learn more about the effects of Booking reassignment

Reassignment eligibility

A booking must be a one-on-one meeting to be eligible for reassignment. Only OnceHub Administrators can reassign bookings.

Learn more about the rules of Booking reassignment

Booking pages available for assignment

If a booking is eligible for reassignment, you can reassign it to any Booking page in the system that has one-on-one meetings. The Booking reassignment wizard will show you the Booking pages that are available for assignment.

Reassignment FAQ

You can find answers to the most commonly asked questions about Booking reassignment in our Booking reassignment FAQ.

If you have further questions, please don't hesitate to contact us.

User action: Reassign a booking

Last Modified on May 27, 2024

Booking reassignment allows you reassign bookings in your Activity stream from one Team member to another. In this article, you'll learn how to reassign a booking.

Requirements

- You must be a OnceHub Administrator.
- Additionally, you must be the Owner, an Editor, or a Viewer of the Booking page that the booking was made on.
- Booking reassignment is only available between Users who are both connected to Google Calendar, or Users who are both **not connected** to any calendar.
- The meeting type must be a one-on-one meeting. Panel or team-hosted meetings cannot be reassigned

Reassigning a booking

1. Select the booking that you want to reassign in the Activity stream.
2. In the **Details** pane, select **Reassign the booking** (Figure 1).

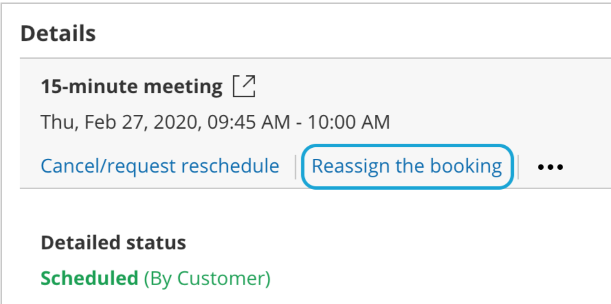


Figure 1: Reassign the booking

> **Note :**
>
> If the **Reassign booking** action is not available for the booking, it means that the booking is not eligible for reassignment. Learn more about the eligibility for Booking reassignment

3. The **Reassign the booking** pop-up will open.
4. Select the Booking page which you would like to reassign the booking to (Figure 2). You can filter by **Booking page Owner** or by **Booking pages with available time** using the left drop-down menu.

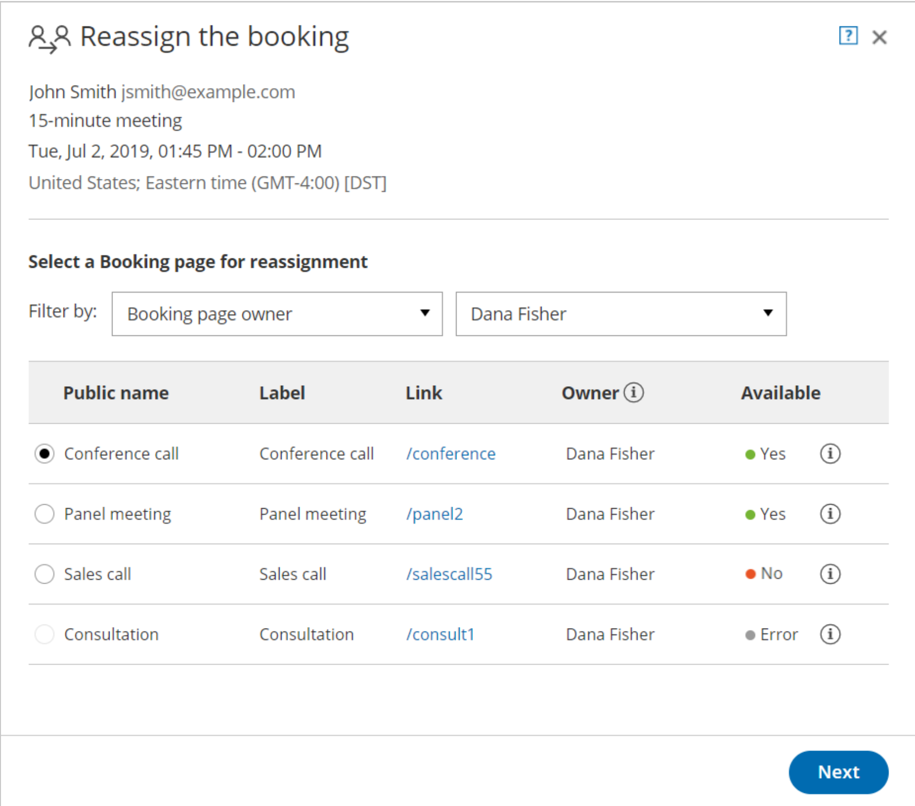


Figure 2: Reassign the booking pop-up

5. You can reassign a booking to a Booking page labeled **Yes** or **No** under the **Available** column.

   - **Yes:** The Booking page is available at the designated time.
   - **No:** The Booking page is either busy at the designated time, or the designated time is outside of the User's recurring or date-specific availability. You can still reassign the booking to a Booking page that is not available.
   - **Error:** The page cannot accept bookings due to a system error. The Booking page may be disabled, or there may be a calendar connection error. It can also mean that the Booking page is not eligible for reassignment.

6. Click **Next**.
7. In the **Notification** step, you can add a **Booking reassignment reason** that will be provided to the Customer. This step is optional.
   The **Booking reassignment reason** is shown in the **Details** pane of the Activity stream for a reassigned booking. It is also included in the email notifications sent to the original Booking owner, the new Booking owner, and any additional stakeholders. This allows you to communicate the reason for reassigning a booking to relevant Users.
8. Click **Next**.
9. In the **Review** step, confirm the details of the booking that you're about to reassign.
10. Click **Reassign booking**.
11. In the **Confirmation** step, you'll receive confirmation that the booking has been successfully reassigned.

Booking reassignment FAQs

Last Modified on Jul 16, 2020

Booking reassignment allows you to reassign bookings in your Activity stream from one Team member to another. This is useful in situations such as when a Team member is unavailable, or when a different Team member is better able to serve a specific Customer.

In this article, you'll find answers to some of the most common questions related to Booking reassignment.

How do I reassign a booking?

To reassign a booking, select the booking activity in your Activity stream. Then, in the **Details** pane, select **Reassign the booking** (Figure 1).

Follow the steps in the **Reassign the booking** pop-up to reassign the booking from one Team member to another.

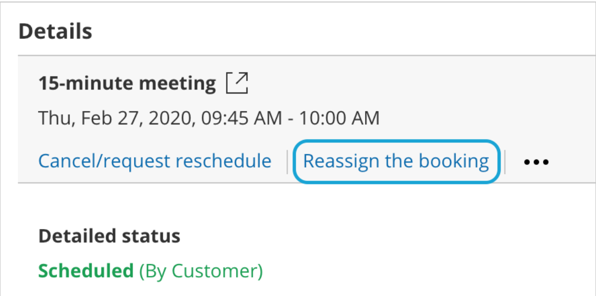


Figure 1: Reassign the booking

Learn more how to reassign bookings from the Activity stream

Why don't I see the 'Reassign the booking' option?

If you don't see the **Reassign the booking** option in the **Details** pane of a particular activity, this means the booking activity is not eligible for reassignment. There are a number of reasons why the booking may not be eligible for reassignment.

- Only OnceHub Administrators can reassign booking.
- Additionally, you must be the Owner, an Editor, or a Viewer of the Booking page that the booking was made on.
- A booking must be a one-on-one meeting to be eligible for reassignment.

Can I reassign a booking to a Booking page that already has a booking at the same time?

Yes, you can. In the **Reassign the booking** pop-up, Booking pages that are eligible for reassignment but not available during that specific time slot are marked in the **Available** column as **No** (Figure 2).

You can still reassign bookings to these Booking pages, but this will create a double-booking. To resolve this, you'll need to reschedule, cancel, or reassign one of the bookings.

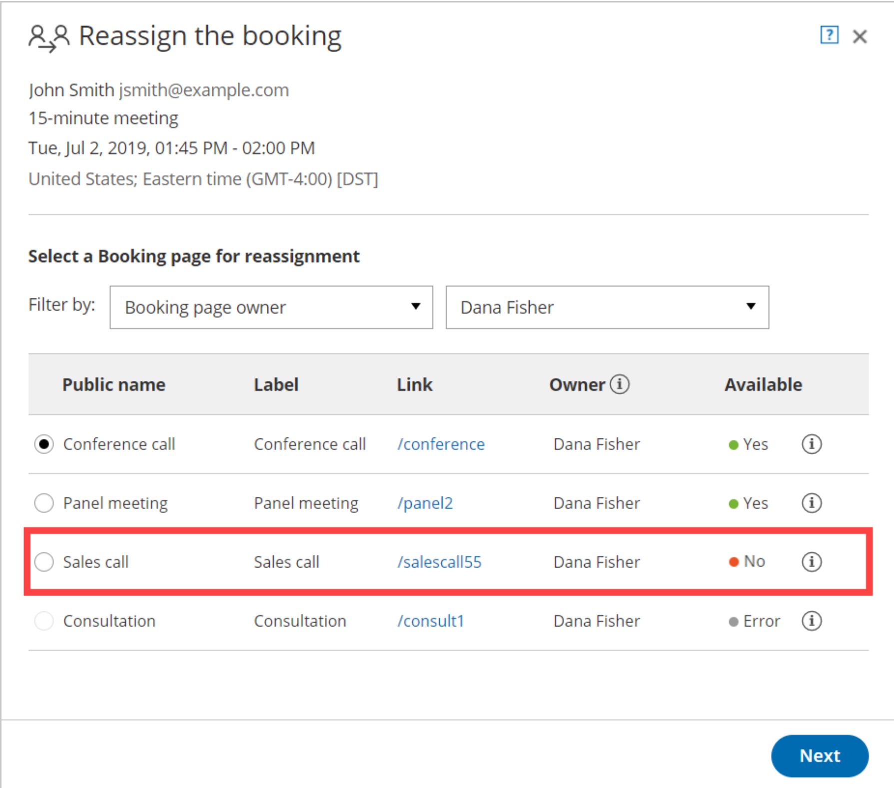


Figure 2: Reassign the booking pop-up

Can I reassign a booking to a Booking page that has no availability at the meeting time?

Yes, you can. In the **Reassign the booking** pop-up, Booking pages that are eligible for reassignment but not available during that specific time slot are marked in the **Available** column as **No** (Figure 3).

However, the booking might be scheduled outside of the Booking page's recurring or date-specific availability.

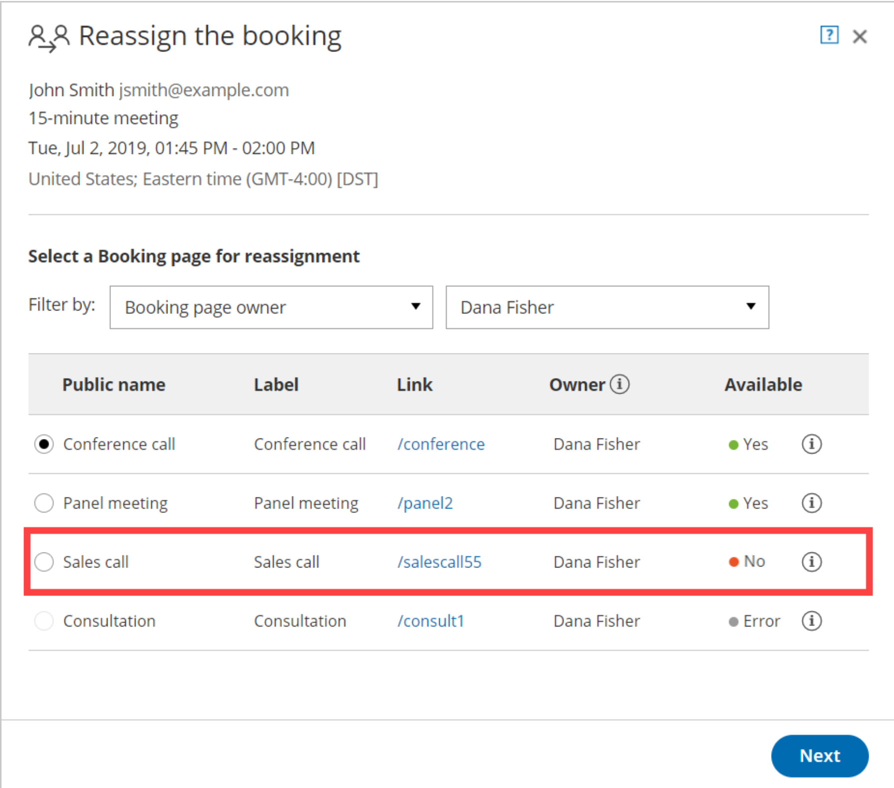


Figure 3: Reassign the booking pop-up

Can I reassign a booking to a new Booking page when the location of the original booking page is not the same as the location of the new Booking page?

Yes, you can. However, you'll need to update the location details for the booking manually. The location details will not appear in future User notifications or Customer notifications, calendar events, or the Activity stream for the reassigned booking.

Why can't I see all the Booking pages in my account in the Reassign the booking pop-up?

Only Booking pages that are eligible for reassignment appear in the **Reassign the booking** pop-up.

For example, a Booking page that only offers Group sessions will not be eligible for reassignment.

Why does the Reassign the booking pop-up say there is an Error with a certain Booking page?

A Booking page may be marked as **Error** if the page cannot accept bookings due to a system error. This can happen because the target Booking page is disabled, or there may be a calendar connection error with the Booking page.

Does the Customer know that reassignment is taking place?

No. When a booking is reassigned, the experience is invisible to Customers. From your Customer's perspective, the event remains as originally scheduled. The Customer will receive notifications for the event as originally planned.

If required, you can provide the Customer with a **Booking reassignment reason** in the **Notification** step of the **Reassign the booking** pop-up (Figure 4).

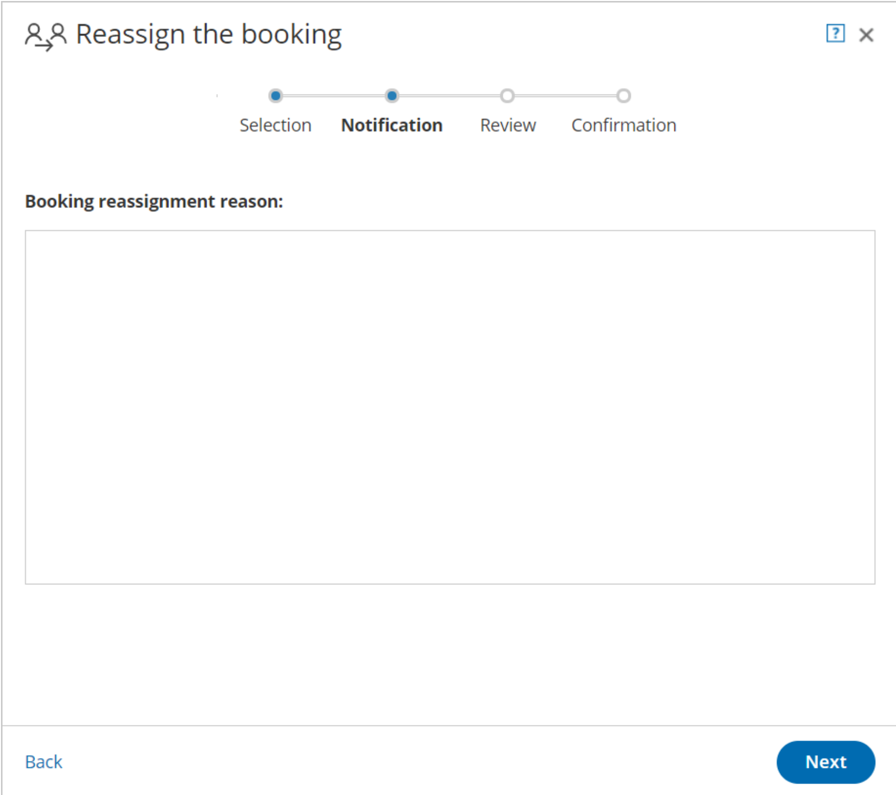


Figure 4: Reassign the booking pop-up—Notification step

Learn more about the effects of Booking reassignment

Who is notified when I reassign a booking?

The original Booking owner and Reassigned Booking owner, and associated Booking page Editors are notified of the reassignment via email and, if selected, SMS notification.

Can I reassign a booking multiple times?

Yes. You can reassign a booking as many times as you need to. Each time you reassign a booking, the original Booking owner, the Reassigned Booking owner and associated Editors are notified of the Booking reassignment.

If you reassign a booking more than once, the original Booking owner is always notified, along with the new Reassigned booking owner. However, any previous Reassigned Booking owners are not notified.

If I am the original Booking owner or Editor of a booking, do I get reminder notifications and follow-up notifications after it has been reassigned?

No. All reminder and follow-up notifications are sent to the Reassigned Booking owner and associated Editors, based on the User notification settings of the reassigned Booking page.

What happens when a request to reschedule is sent or the booking is rescheduled after reassignment?

The rescheduling process is always based on the original Booking page settings. Notifications are sent to the original Booking owner, the Reassigned booking owner and associated Editors based on the original Booking page's User notifications setting.

What happens when the booking is canceled after reassignment?

If the booking is canceled, the Reassigned Booking owner and Editors may be notified based on the reassigned Booking page's User notifications setting.

The original Booking owner and associated Editors will not receive any notifications.

Who has access to the reassigned booking in the Activity stream?

The Reassigned Booking owner, Editors, and Viewers can access the booking in the Activity stream. If the booking is reassigned multiple times, previous Reassigned Booking owners, Editors, and Viewers will not have access to the booking in the Activity stream.

Which calendars support Booking reassignment?

Booking reassignment is available between Users who are both connected to Google Calendar, or between Users who are both **not connected** to any calendar. Learn more about Booking reassignment eligibility

> **Note:**
>
> Reassignment when connected to Zoom is only supported when both parties have a Professional-level Zoom account.

Eligibility for booking reassignment FAQs

Last Modified on Jun 4, 2020

Booking reassignment allows you to reassign bookings from one Team member to another from your Activity stream.

In this article, you'll learn about the rules and requirements for booking reassignment.

Who can reassign a booking?

To reassign a booking, you must be a OnceHub Administrator.

Additionally, you must be the Owner, an Editor, or a Viewer of the Booking page that the booking was made on.

Which bookings can be reassigned?

Booking reassignment is only available between Users who are both connected to Google Calendar, or Users who are both **not connected** to any calendar. Booking reassignment is not available for Users connected to other calendars.

The meeting type must be a one-on-one meeting.

> **Note:**
>
> You cannot reassign a booking from a User who is **not connected** to a calendar to a User who **is connected** to Google Calendar, and vice versa.
>
> You can only reassign bookings between Users with similar calendar configurations. For example, you can reassign a booking from a User connected to Google Calendar to another User who is also connected to Google Calendar.

In specific booking scenarios, you won't be able to see the **Reassign the booking** option in the **Details** pane of the activity. The following scenarios are not supported by booking reassignment:

- The scheduling status is **No-show**, **Canceled**, **Completed**, or **Requested**.
- The Booking page Owner is connected to Exchange/Outlook Calendar, Office 365 Calendar, or iCloud Calendar.
- The booking is a Group session, Session package, or a single session that is part of a Session package.

Which Booking pages can receive a reassigned booking?

When you reassign a booking, you'll select the Booking page which you would like to reassign the booking to. The Booking pages available for reassignment follow the rules below:

- The Booking page Owner is connected to Google Calendar, or is not connected to any calendar.
- The Scheduling options are set to one-on-one meetings.

> **Note:**

To help you make an informed decision during the booking reassignment process, you can see the availability of each eligible Booking page at the designated booking time in the **Reassign the booking** pop-up.

You can reassign a booking to a Booking page that is available or busy at the meeting time. Learn more about reassigning a booking

How does booking reassignment work with video conferencing integration?

Booking reassignment is supported for GoToMeeting and Zoom integrations.

When a booking is reassigned from one Booking page to another and both are **connected to the same video conferencing solution**, the event ownership is updated automatically in the video conferencing app. All future User notifications and Customer notifications will include the updated video conferencing details.

Note:

Reassignment when connected to Zoom is only supported when both parties have a Professional-level Zoom account.

If the original Booking page and target Booking pages are **not connected to the same video conferencing solution**, the video conferencing solution will not be updated automatically and you will need to inform your Customer regarding the future location details. In this case, future Customer notifications will not include location details.

Note:

Booking reassignment is not supported for Webex Meetings integration.

How does booking reassignment work with other meeting locations?

When the Booking page **Meeting location** is set to **This is a face-to-face meeting**, or the virtual location is set to **Video conferencing: Other**, the booking can be reassigned but the location will not be updated for the reassigned booking.

You will need to inform your Customer regarding the future location details. In this case, subsequent Customer notifications will not include location details.

How does booking reassignment work with CRM integration?

Booking reassignment is supported for Salesforce and Infusionsoft integrations. When a booking is reassigned from one Booking page to another and both **are connected to the same CRM solution**, the event ownership is updated automatically in the CRM integration app.

- In Salesforce, the Event status field will be updated to either **Scheduled (Reassigned by User)** or **Rescheduled (Reassigned by User)**, depending on the booking lifecycle.
- In Infusionsoft, specific booking lifecycle tags will be automatically added to Contact records and will indicate if a booking has been reassigned.

If the original and target Booking pages **are not connected to the same CRM solution**, the CRM integration app will not be updated automatically and you will need to update the app manually.

Effects of Booking reassignment

Last Modified on Jul 3, 2019

In this article, you'll learn about the effects of reassigning a booking for Customers, the Booking owner, the Reassigned Booking owner, Editors, and Viewers.

Effects for the Customer

- By default, the Customer is not notified that the booking has been reassigned.
- If required, you can choose to notify the Customer by adding a **Booking reassignment reason** in the **Notification** step of the **Reassign the booking** pop-up. Learn more about reassigning a booking
- The Customer receives future notifications based on the Customer notification settings set for the original Booking page.

Effects for original Booking owner, Editors, and Viewers

- The original Booking owner and Editors are notified of the Booking reassignment based on the original Booking page User notification settings.
- After reassignment, they will not receive reminders and follow-up notifications for the booking.
- If a request to reschedule is sent or the booking is rescheduled, the Booking owner and Editors may be notified based on the original Booking page User notification settings.
- The time slot becomes available for the original Booking owner.
- The original Booking owner, Editors, and Viewers always have access to the booking in the Activity stream.

Note:

When a booking is rescheduled, the original Booking page settings are applied. This means that the booking may be rescheduled with a different Booking owner than the original Booking owner. The booking will appear in the new Booking owner's Activity stream.

Effects for the Reassigned Booking owner and Editors

- The Reassigned Booking owner and Editors are notified of the Booking reassignment based on the reassigned Booking page User notification settings.
- After reassignment, the Reassigned Booking owner and Editors may receive reminders and follow-up notifications based on the Booking page User notification settings.
- The time slot becomes unavailable for the Reassigned booking owner.
- If the booking is canceled, the Reassigned Booking owner and Editors may be notified based on the Booking page User notification settings.
- The Reassigned Booking owner, Editors, and Viewers can access the booking in the Activity stream. If the booking is reassigned multiple times, previous Reassigned Booking owners, Editors, and Viewers will not have access to the booking in the Activity stream.

Introduction to reports

Last Modified on Oct 12, 2022

Reports cover all booking activity. Reports can be generated based on different dimensions: by Customer, by Booking page, by Event type, by Master page, and by User. Account reports and Revenue reports can be used to see a global view of all account activity and all revenue details.

You do not need an assigned product license to access reports, though you do need to be an Administrator. Learn more

Reports can be found by going in the top navigation menu **Booking pages** in the bar on the left → **Reports** on the left.

Types of reports

There are two types of reports:

- **Summary reports** provide a high level overview by booking activity lifecycle phase.
- **Detail reports** provide detailed information. These reports can be customized using System fields and any Custom field that you create in the Fields library.

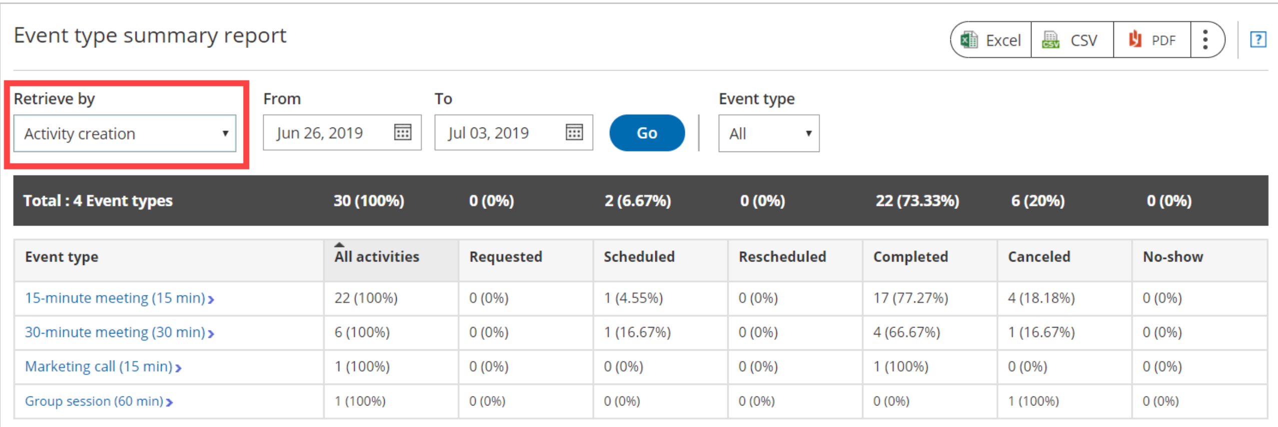
Each report can be exported as Excel, PDF, or CSV files. Branded printouts can also be provided to all stakeholders.

Note :

When you export a report in Excel or CSV format, the date and time format is based on the User's personal date and time format settings.

Retrieving activities

Activities can be retrieved according to **Meeting time** or **Activity creation** date by using the **Retrieve by** drop-down menu (Figure 1).



Total : 4 Event types	30 (100%)	0 (0%)	2 (6.67%)	0 (0%)	22 (73.33%)	6 (20%)	0 (0%)
Event type	All activities	Requested	Scheduled	Rescheduled	Completed	Canceled	No-show
15-minute meeting (15 min) ›	22 (100%)	0 (0%)	1 (4.55%)	0 (0%)	17 (77.27%)	4 (18.18%)	0 (0%)
30-minute meeting (30 min) ›	6 (100%)	0 (0%)	1 (16.67%)	0 (0%)	4 (66.67%)	1 (16.67%)	0 (0%)
Marketing call (15 min) ›	1 (100%)	0 (0%)	0 (0%)	0 (0%)	1 (100%)	0 (0%)	0 (0%)
Group session (60 min) ›	1 (100%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	1 (100%)	0 (0%)

Figure 1: Retrieve by drop-down menu

When you select a date range, OnceHub retrieves all activities that **were started** during the reporting period and displays their states at the time that the report is run. This means that if the report is run on different days, it may show the same activities in different states.

Note:

When you retrieve activities by **Meeting time**, activities in **Requested** status will not be displayed as they are not confirmed bookings.

For example, 100 activities were started during the last month. If you run the report one day after the month's end, you would see the following:

- 12 activities are in **Requested** status
- 60 activities are in **Scheduled** status
- 4 activities are in **Rescheduled** status
- 8 activities are in **Completed** status
- 5 activities are in **No-show** status
- 11 activities are in **Canceled** status

  Total: 100 activities

The total number of activities is 100, and if we generate the same report two days later, the total will still be 100. However, the distribution of the numbers between the statuses may change, since activities can change their state. For example, 10 of the **Scheduled** status activities may now be in **Completed** status.

Learn more about Activity statuses

General report rules

- The **Creation date** and **Last updated** date are always based on the default time zone in the User profile date and time section, regardless of the Booking page time zone.
- You can always change a parameter without affecting other parameters. For example, you can set a date range and then drill into a specific Customer activity. The date range will not change.
- Any column can be sorted by clicking on its header. One click sorts down and the second click sorts up.
- You can add custom columns to Detail reports and create customized reports with the exact data that you need. There are two types of fields that can be added to any detail report:
  - **System fields:** These are fields defined by the system, such as **Location**, **Cancellation reason**, and **Duration**. More than 30 system fields can be added to any Detail report.
  - **Custom fields:** These are fields that you create and use in your Booking forms based on your business needs. Custom fields are created in the Custom fields library and all library fields can be added to Detail reports as additional report columns.
- If the Customer or the Owner reschedules, it will count as a rescheduled activity only. The canceled activity will not show in the reports and the new rescheduled activity will replace it. This is done to avoid double-counting.
- Reports are only for Customer self-scheduling activities and do not cover Group scheduling activities.
- When you change an Activity status from **Completed** to **No-show**, the change will be reflected in the next report update cycle which takes place daily at 7:00am and 7:00pm Eastern time. Learn more about tracking and reporting of No-shows

Event type reports

Last Modified on Jun 5, 2023

OnceHub reports cover all booking activity. Reports can be generated based on different dimensions: by Customer, by Booking page, by Event type, by Master page, and by User.

In this article, you'll learn about Event type reports. Access your Event type reports by going to Setup -> OnceHub setup -> Hover over the left sidebar -> Reports -> Event type reports.

Event type summary report

Event type summary reports help you understand booking activity by Event type. For each Event type, you can see how many bookings have been **Scheduled**, **Rescheduled**, **Completed**, **Canceled**, or set to **No-Show**. This gives you insight into which Event types sell and which don't.

By default, Event types in the Summary report are sorted by **All activities**, meaning the Event type with the highest number of activities will be at the top of the list. To change how the report is sorted, click any of the column headers.

Note:

If you move an activity to the Trash, it will be included in reports until deleted. The activity will display as being **(In Trash)**. After they are permanently deleted, any fields related to this deleted activity will not show up in reports. Learn more

Deleting activities is a new feature being rolled out gradually. If you do not see this option in your Activity stream and it's necessary for your account management, please contact us and we'd be happy to turn it on for you.

If an Event type was deleted, the Event type report will still show all the activities that were generated from this Event type, provided they were generated during the reporting date range. The deleted Event type will show in gray text with **[deleted]** next to it.

Event type detail report

To view a detailed report of the booking activity for a specific Event type, click on the Event type in the **Event type** column. Here, you can see a complete booking log for the specific Event type.

By default, the bookings are sorted by **Meeting date and time**. To change how the report is sorted, click any of the column headers.

Note:

To customize the display columns in the detail report, click the **Display columns** button. Learn more about Detail report columns

Exporting an Event type report

You can export an Event type report as an Excel, CSV, or PDF file. To export a report, click on the **Excel**, **CSV** or **PDF** button in the top right corner of the report page (Figure 1).

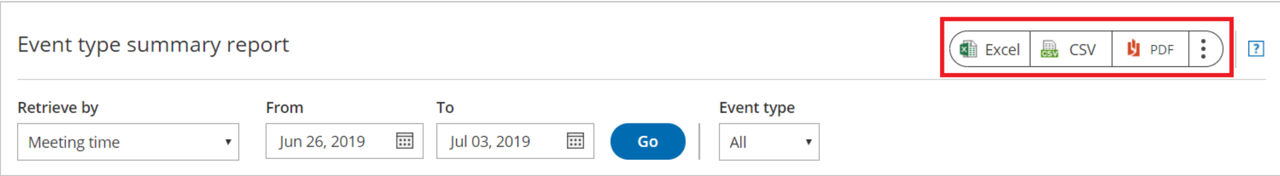


Figure 1: Export report buttons

Booking page reports

Last Modified on Jun 5, 2023

OnceHub reports cover all booking activity. Reports can be generated based on different dimensions: by Customer, by Booking page, by Event type, by Master page, and by User.

In this article, you'll learn about Booking page reports. Access your Booking page reports by going to Setup -> OnceHub setup -> Hover over the left sidebar -> Reports -> Booking page reports.

Booking page summary report

Booking page summary reports help you understand booking activity by Booking page. For each Booking page, you can see how many bookings have been **Scheduled**, **Rescheduled**, **Completed**, **Canceled**, or set to **No-Show**. This gives you insight into overall Booking page activity and how it is divided between the different Booking pages.

By default, Booking pages in the summary report are sorted by **All activities**, meaning the Booking with the highest number of activities will be at the top of the list. To change how the report is sorted, click any of the column headers.

Note:

If you move an activity to the Trash, it will be included in reports until deleted. The activity will display as being **(In Trash)**. After they are permanently deleted, any fields related to this deleted activity will not show up in reports. Learn more

If a Booking page was deleted, the Booking page report will still show all the activities that were generated from this Booking page, provided they were generated during the reporting date range. The deleted Booking page will be shown in gray text with **[deleted]** next to it.

Booking page detail report

To view a detailed report of the booking activity for a specific Booking page, click on the Booking page in the **Booking page** column. Here, you can see a complete booking log for the specific Booking page.

By default, the bookings are sorted by **Meeting date and time**. To change how the report is sorted, click any of the column headers.

Note:

To customize the display columns in the detail report, click the **Display columns** button. Learn more about Detail report columns

Exporting a Booking page report

You can export a Booking page report as an Excel, CSV, or PDF file. To export a report, click on the **Excel**, **CSV** or **PDF** button in the top right corner of the report page (Figure 1).

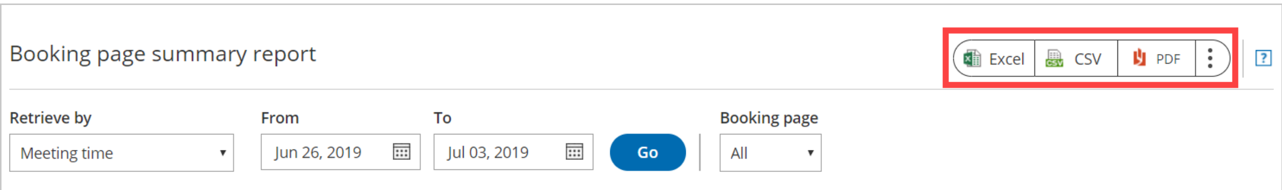


Figure 1: Export report buttons

Master page reports

Last Modified on Jun 5, 2023

OnceHub reports cover all booking activity. Reports can be generated based on different dimensions: by Customer, by Booking page, by Event type, by Master page, and by User.

Master page reports are similar to Booking page reports, but instead of having to view each Booking page separately, the Master page report provides a consolidated view of all activity within that Master page. Master page reports only display the activity in included Booking pages when bookings are made via the Master page.

In this article you'll learn about Master page reports. Access your Master page reports by going to Setup -> OnceHub setup -> Hover over the left sidebar -> Reports -> Master page reports.

Master page summary report

Master page summary reports help you understand booking activity by Master page. For each Master page, you can see how many bookings have been **Scheduled**, **Rescheduled**, **Completed**, **Canceled**, or set to **No-Show**. This gives you insight into overall Master page activity and how it is divided between the different Master pages.

By default, Master pages in the Summary report are sorted by **Activity**, meaning the Master page with the highest number of activities will be at the top of the list. To change how the report is sorted, click any of the column headers.

Note:

If you move an activity to the Trash, it will be included in reports until deleted. The activity will display as being **(In Trash)**. After they are permanently deleted, any fields related to this deleted activity will not show up in reports. Learn more

Deleting activities is a new feature being rolled out gradually. If you do not see this option in your Activity stream and it's necessary for your account management, please contact us and we'd be happy to turn it on for you.

If a Master page was deleted, the Master page report will still show all the activities that were generated from this Master page, provided they were generated during the reporting date range. The deleted Master page will be shown in gray text with **[deleted]** next to it.

Master page detail report

To view a detailed report of the booking activity for a specific Master page, click on the Master page in the **Master page** column. Here, you can see a complete booking log for the specific Master page.

By default, the bookings are sorted by **Meeting date and time**. To change how the report is sorted, click any of the column headers.

Exporting a Master page report

You can export a Master page report as an Excel, CSV, or PDF file. To export a report, click on the **Excel**, **CSV** or **PDF** button in the top right corner of the report page (Figure 1).

Figure 1: Export report buttons

Customer reports

Last Modified on Jun 5, 2023

OnceHub reports cover all booking activity. Reports can be generated based on different dimensions: by Customer, by Booking page, by Event type, by Master page, and by User.

In this article, you'll learn about Customer reports. Access your Customer reports by going to Setup -> OnceHub setup -> Hover over the left sidebar -> Reports -> Customer reports.

Customer summary report

Customer reports help you understand booking activity by Customer. For each Customer, you can see how many bookings have been **Scheduled**, **Rescheduled**, **Completed**, **Canceled**, or set to **No-Show**. This gives you insight into how many bookings and cancellations took place during a period of time.

Customers are grouped by their email address and name. If the Customer uses different names with the same email address, each email-name combination will be displayed separately.

By default, Customers in the summary report are sorted by **All activities**, meaning the Customer with the highest number of activities will be at the top of the list. To change how the report is sorted, click any of the column headers.

> **Note:**
>
> If you move an activity to the Trash, it will be included in reports until deleted. The activity will display as being **(In Trash)**. After they are permanently deleted, any fields related to this deleted activity will not show up in reports. Learn more

Customer detail report

To view a detailed report of the booking activity for a specific Customer, click on the Customer in the **Customer** column. Here, you can see a complete booking log for the specific Customer.

A Customer detail report may be useful for billing purposes, or to provide a schedule report to a Customer when they need to meet multiple providers.

By default, the bookings are sorted by **Meeting date and time**. To change how the report is sorted, click any of the column headers.

> **Note:**
>
> To customize the display columns in the detail report, click the **Display columns** button. Learn more about Detail report columns

Exporting a Customer report

You can export a Customer report as an Excel, CSV, or PDF file. To export a report, click on the **Excel**, **CSV** or **PDF** button in the top right corner of the report page (Figure 1).

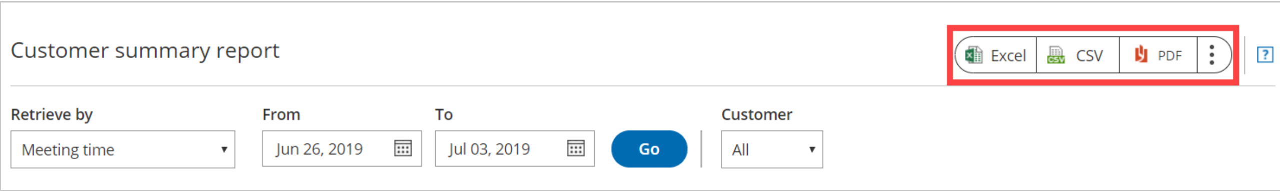


Figure 1: Export report buttons

User reports

Last Modified on Jun 5, 2023

OnceHub reports cover all booking activity. Reports can be generated based on different dimensions: by Customer, by Booking page, by Event type, by Master page, and by User. User reports are used for multi-user accounts to show multiple system Users and their booking activity.

In this article, you'll learn about User reports. Access your User reports by going to Setup -> OnceHub setup -> Hover over the left sidebar -> Reports -> User reports.

User summary report

User reports help you understand booking activity by User. For each User, you can see how many bookings have been **Requested, Scheduled**, **Rescheduled**, **Completed**, **Canceled**, or set to **No-Show**. This gives you insight into overall booking activity and how it is divided between the different Users.

Users are grouped by their User name and email address. The User name and email address of the User are those set in the Personal details section of the User's profile. A OnceHub Administrator can also see these details for each User in the **Users** section of their OnceHub Account. Learn more about User management

An activity will display for a given User if the User was the Owner of the Booking page at the time that the booking was created. If the Booking page is assigned to a different User at some stage in the future, the activity will still belong to the original User.

By default, Users in the summary report are sorted by **All activities**, meaning the User with the highest number of activities will be at the top of the list. To change how the report is sorted, click any of the column headers.

Note:

If you move an activity to the Trash, it will be included in reports until deleted. The activity will display as being **(In Trash)**. After they are permanently deleted, any fields related to this deleted activity will not show up in reports. Learn more

Deleting activities is a new feature being rolled out gradually. If you do not see this option in your Activity stream and it's necessary for your account management, please contact us and we'd be happy to turn it on for you.

If a User is deleted, the User's activities are automatically assigned to the Administrator that deleted the User and the activities will then show under that Administrator.

User detail report

To view a detailed report of the booking activity for a specific User, click on the User in the **User** column. Here, you can see a complete booking log for the specific User. The User can be the Owner of multiple Booking pages.

A User detail report may be useful as an agenda report so that the User can see all of their bookings.

By default, the bookings are sorted by **Meeting date and time**. To change how the report is sorted, click any of the column headers.

Note:

To customize the display columns in the detail report, click the **Display columns** button. Learn more about Detail report columns

Exporting a User report

You can export a User report as an Excel, CSV, or PDF file. To export a report, click on the **Excel**, **CSV** or **PDF** button in the top right corner of the report page (Figure 1).

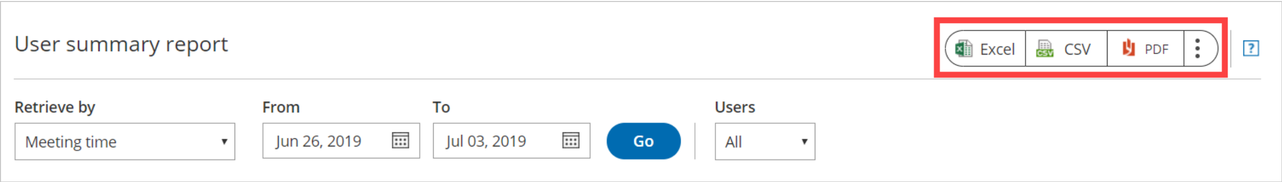


Figure 1: Export report buttons

Account reports

Last Modified on Jun 5, 2023

OnceHub Account reports and Revenue reports can be used to see a global view of all account activity and all revenue details.

In this article, you'll learn about Account reports. Access your Account reports by going to Setup -> OnceHub setup -> Hover over the left sidebar -> Reports -> Account reports.

Account detail reports

Account reports show all OnceHub booking activity across your account. These reports are a useful way to measure business performance.

The Account report is only available as a Detail report. You can see the total number of activities in account that have been **Scheduled**, **Rescheduled**, **Completed**, **Canceled**, or set to **No-Show** at the top of the Account report page.

> **Note:**
>
> If you move an activity to the Trash, it will be included in reports until deleted. The activity will display as being **(In Trash)**. After they are permanently deleted, any fields related to this deleted activity will not show up in reports. Learn more
>
> Account reports can include activities from deleted Booking pages and deleted Users. The relevant activity date and time must be within the reporting date range to show in the report.

By default, activities in the Account report are sorted by **Meeting date and time in Owner's time zone**, meaning the activity with the earliest Meeting time will be at the top of the list. To change how the report is sorted, click any of the column headers.

> **Note:**
>
> To customize the display columns in the detail report, click the **Display columns** button. Any changes you make to the reporting dimensions are reflected in your exported Account report.
>
> Learn more about Detail report columns

Exporting Account reports

You can export an Account report as an Excel, CSV, or PDF file. To export a report, click on the **Excel**, **CSV** or **PDF** button in the top right corner of the report page (Figure 1).

Figure 1: Export report buttons

Revenue reports

Last Modified on Jun 5, 2023

OnceHub Account reports and Revenue reports can be used to see a global view of all account activity and all revenue details.

In this article, you'll learn about Revenue reports. Access your Revenue reports by going to Setup -> OnceHub setup -> Hover over the left sidebar -> Reports -> Revenue reports.

Revenue summary reports

Revenue reports show overall revenue from bookings for a given period of time. You can see which Event types bring in the most and least revenue, and which Customers bring in the most and least revenue. It also gives you an insight into how the overall revenue is divided between the different Booking pages.

The Revenue report is only available as a Detail report. Transactions can be filtered by **Customer**, **Booking page**, **Event type**, **Owner**, **Master page**, **Transaction type**, and **Transaction status**.

The **Revenue**, **Amount refunded**, and **Amount** presented in the mini dashboard at the top of the report are updated based on dates chosen, the currency selected, and the filter dimensions chosen.

Note:

If you move an activity to the Trash, it will be included in reports until deleted. The activity will display as being **(In Trash)**. After they are permanently deleted, any fields related to this deleted activity will not show up in reports. Learn more

Deleting activities is a new feature being rolled out gradually. If you do not see this option in your Activity stream and it's necessary for your account management, please contact us and we'd be happy to turn it on for you.

Revenue reports can include revenue from bookings from deleted Booking pages and deleted Users. The relevant activity date and time must be within the reporting date range to show in the report.

Use the **Currency** drop-down menu to select the currency to display in the Revenue report (Figure 1). Only transactions in the currency selected are displayed.

The currency drop-down menu in the Revenue report includes currencies that you may not necessarily be using to accept payments for your bookings. If you select a currency from the drop-down menu which you do not use to accept payments, then no transactions will be displayed.

Figure 1: Currency drop-down menu

By default, activities in the Revenue report are sorted by **Payment transaction date**. Only transactions within the selected date range are displayed. To change how the report is sorted, click any of the column headers.

Note:

To customize the display columns in the Detail report, click the **Display columns** button. Any changes you make to the reporting dimensions are reflected in your exported Revenue report. Payment data system fields can only be added to Revenue reports.

Learn more about Detail report columns

Exporting Revenue reports

You can export a Revenue report as an Excel, CSV, or PDF file. To export a report, click on the **Excel**, **CSV** or **PDF** button in the top right corner of the report page (Figure 1).

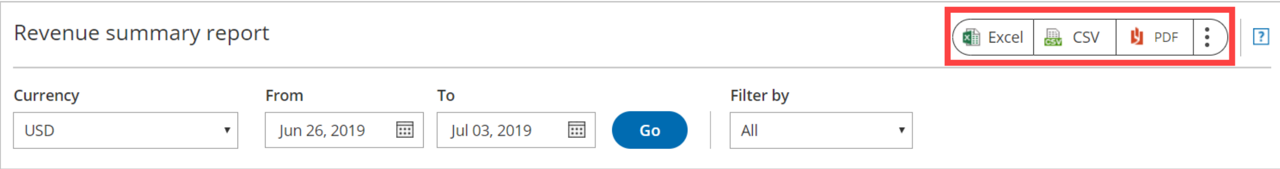


Figure 1: Export report buttons

Report header

Last Modified on Jun 5, 2023

Reports generated by OnceHub can also be used externally with Customers or other stakeholders. For example, you may have a Customer who asks you to provide a schedule report when they need to meet multiple providers. In this case, you could generate a Customer detail report to send to the Customer.

By default, the OnceHub report header is displayed in PDF reports. However, you may want to use your own branded report header for reports that are sent to external stakeholders.

In this article, you'll learn how to upload your own branded report header to use in PDF reports.

Uploading your own branded report header

1. From OnceHub setup, go to the lefthand sidebar and click on **Reports**.
2. Select any report type.
3. Click the action menu (three dots) on the right of the page (Figure 1).

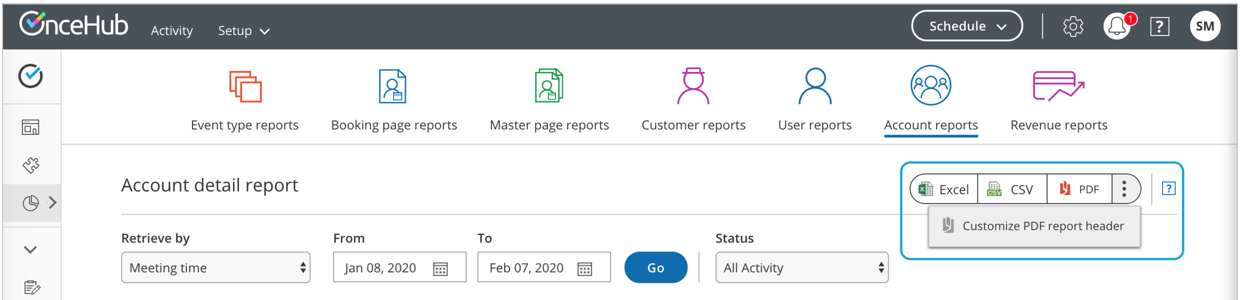


Figure 1: Customize PDF report header option

4. Click **Customize PDF report header**.
5. In the **Report header** popup, click **Choose File** to choose your own header and upload it (Figure 2). The recommended dimensions for a report header are 840 pixels wide and 70 pixels high.
6. After you've selected the header you want to upload, click **Save**.

Note:

The report header will only show in PDF reports. Click the PDF button to generate a report for your current report view.

Complete list of Detail report columns

Last Modified on Jun 5, 2023

More than 30 System fields and all Custom fields from the Fields library can be added to any Detail report.

This article gives you a list of all of the System fields that can be added to Detail reports. To customize the display columns in the Detail report, click the **Display columns** button.

Booking data

- **Meeting date and time in Customer's time zone**: The booking date and time of a scheduled meeting in the Customer's time zone. The field returns the meeting date, start time and end time. For example, Monday Jan 6, 2019, 11:30 AM - 12:00 PM.
- **Meeting date and time in Owner's time zone**: The booking date and time of a scheduled meeting in the Booking owner's time zone. The field returns the meeting date, start time and end time. For example, Monday Jan 6, 2019, 11:30 AM - 12:00 PM.
- **Starting date and time in Customer's time zone**: The start date and time of a scheduled meeting in the Customer's time zone. The field returns the meeting date, start time. For example, Monday Jan 6, 2019 at 11:30 AM.
- **Starting date and time in Owner's time zone:** The start date and time of a scheduled meeting in the Booking owner's time zone. The field returns the meeting date, start time. For example Monday Jan 6, 2019 at 11:30 AM.
- **Duration**: The meeting duration (in hours or minutes). For example, 15 min or 3 hrs.
- **Subject/Event type**: The subject of the meeting. This field can show the subject set by the Owner or by the Customer. For example, "Product demo". If Event types are used, the name of the Event type is the subject.
- **Status**: The status of the activity. This field shows the following states: **Requested**, **Scheduled**, **Rescheduled**, **Completed**, **No-show** or **Canceled**.
- **Last updated:** The date and time of the last change made to the activity. For example, it can display the date and time when the booking was approved. E.g. Wednesday Jan 1, 2019 at 10:33 PM.
- **Virtual or Physical location:** The Meeting location information set for the meeting. It can display virtual conferencing information, face-to-face location information, or it can be left empty.
- **Zoom, Google Meet, Microsoft Teams, GoToMeeting, or Webex Meetings link:** The Zoom, Google Meet, Microsoft Teams, GoToMeeting, or Webex Meetings link used for connecting to the virtual meeting.
- **Booking calendar:** The main booking calendar that the booking was created in.
- **Additional booking calendar:** The additional calendars that the booking is created in.
- **Number of sessions:** The number of sessions in a Session package that were scheduled or canceled by Customer or User.
- **Creation date and time in UTC**: The date and time when the activity was first created in UTC. For example, Sun Jan 5, 2019 at 05:06 AM
- **Tracking ID:** A unique ID automatically assigned to every OnceHub booking.
- **Package ID:** A unique ID automatically assigned to every OnceHub Session package.
- **Booking mode**: The booking mode selected for the meeting. This field shows Automatic booking or Booking with approval.

Customer data

- **Customer name:** The name provided by the Customer in the Booking form when booking.
- **Customer email:** The email address provided by the Customer in the Booking form when booking.
- **Customer company:** The company name provided by the Customer in the Booking form when booking.
- **Customer phone:** The phone number provided by the Customer in the Booking form when booking.
- **Customer mobile phone:** The mobile phone number provided by the Customer in the Booking form when booking.
- **Customer note:** The note provided by the Customer in the Booking form when booking.
- **Customer time zone:** The time zone selected by the Customer at the time of the booking.

Booking page data

- **Booking page name:** The Customer-facing name of the Booking page used to make the booking.
- **Booking page label:** The internal name of the Booking page used to make the booking.
- **Booking page link:** The URL of the Booking page used to make the booking.
- **Booking page time zone:** The Booking page time zone as defined in the Overview section of your Booking page.
- **Booking page Owner:** Displays the Booking page Owner name. To edit this name, click your profile image or initials, and select **Profile ->** Personal details.
- **Editors:** This field lists the Editors assigned to the Booking page. Each Editor name can be edited in the Editor's account by clicking on their profile image or initials, and selecting **Profile ->** Personal details.
- **Booking page category:** The category that the Booking page has been assigned to.
- **Master page name:** The Customer-facing name of the Master page used to make the booking.
- **Master page label:** The internal name of the Master page used to make the booking.
- **Master page link:** The URL of the Master page used to make the booking.

Event type data

- **Event type name:** The name of the Event type selected by the Customer.
- **Event type description:** The description of the Event type selected by the Customer.
- **Event type price:** The price of the Event type selected by the Customer.
- **Event type category:** The category that the Event type belongs to.
- **Event type currency:** The currency used for the Event type price. This is set in the Payment & Cancel/reschedule policy section of the Event type. When you use Payment integration, it is the currency used when payment is collected via OnceHub.

Cancel/reschedule data

- **Name of User who canceled/rescheduled:** The name of the User who performed the cancel or reschedule action.
- **Name of Customer who canceled/rescheduled:** The name of the Customer who performed the cancel or reschedule action.

- **Cancel/reschedule reason:** The reason given for canceling or rescheduling a meeting.

CRM data

- **Infusionsoft Contact:** A link to the Infusionsoft Contact of the Customer who made the booking.
- **Salesforce Lead:** A link to the Salesforce Lead record of the Customer who made the booking.
- **Salesforce Contact:** A link to the Salesforce Contact record of the Customer who made the booking.
- **Salesforce Case:** A link to the Salesforce Case record of the Customer who made the booking.
- **Salesforce Activity:** A link to the Salesforce Activity of the Customer who made the booking.

Payment data

The system fields listed below can only be added to Revenue reports. This is because Payment data fields are itemized per transaction, while all other types of System fields are itemized per activity.

- **Invoice number:** A unique number identifying each Customer invoice generated via Payment integration.
- **Payment transaction date:** The date a payment was made.
- **PayPal transaction ID:** The ID of the transaction in PayPal.
- **PayPal parent transaction ID:** The ID of the transaction in PayPal that a refund was made from.
- **Relative cost:** The cost of each individual session in a Session package. This is the total package cost divided by the number of sessions in the package.
- **Amount refunded:** The value of a refund transaction.
- **Amount received:** The value of a payment transaction.
- **Transaction status:** The current status of the transaction: **Paid**, **Refunded**, or **Pending**.
- **Refund transaction date:** The date a refund was processed.
- **Transaction type:** Any of the following monetary transactions: **PAYMENT (SCHEDULE)**, **PAYMENT (RESCHEDULE)**, **AUTOMATIC REFUND (CANCELLATION)**, **MANUAL REFUND VIA ONCEHUB**, **MANUAL REFUND VIA PAYPAL**.
- **Payment account email address:** The Customer's email address of the PayPal account, or the email address the Customer provided when paying with a credit/debit card for bookings made via OnceHub. For example, john@example.com.
- **Refund reason:** The reason given by the User for issuing a refund.
- **Name of User who processed a manual refund:** The name of the User who processed a manual refund via the Activity stream.

Introduction to the Theme designer

Last Modified on Oct 15, 2024

The Theme designer allows you to fully customize the look and feel of your Booking pages and Master pages.

Requirements

All OnceHub Administrators can access the Theme designer. You do not need an assigned product license to update the Theme designer, create custom themes, or update a Booking page's theme. Learn more

Using themes

Go to **Booking pages** in the bar on the left → **Theme designer** on the left.

Themes allow you to comply with any design policy your organization may have. You can create one theme and apply it to all of your pages to achieve uniform branding, or create multiple themes to make each of your pages unique. Learn more about creating custom themes

You can also select different themes for the same Booking page or Master page when you integrate it onto your website. This gives you the flexibility to visually fit a single Booking page on multiple different website pages.

All themes are centrally managed in the Theme designer. This means that any design changes you make are automatically implemented on the relevant Booking pages and Master pages.

System themes and custom themes

The Theme designer comes with two system themes you can use as-is, or modify them to add your logo and change the background color.

If you need more customization for your theme, you can create a custom theme by duplicating an existing theme and modifying it, or you create a new custom theme from scratch. Learn more about creating custom themes

You can preview a theme on a Booking page or Master page by selecting the **Preview** button (Figure 1).

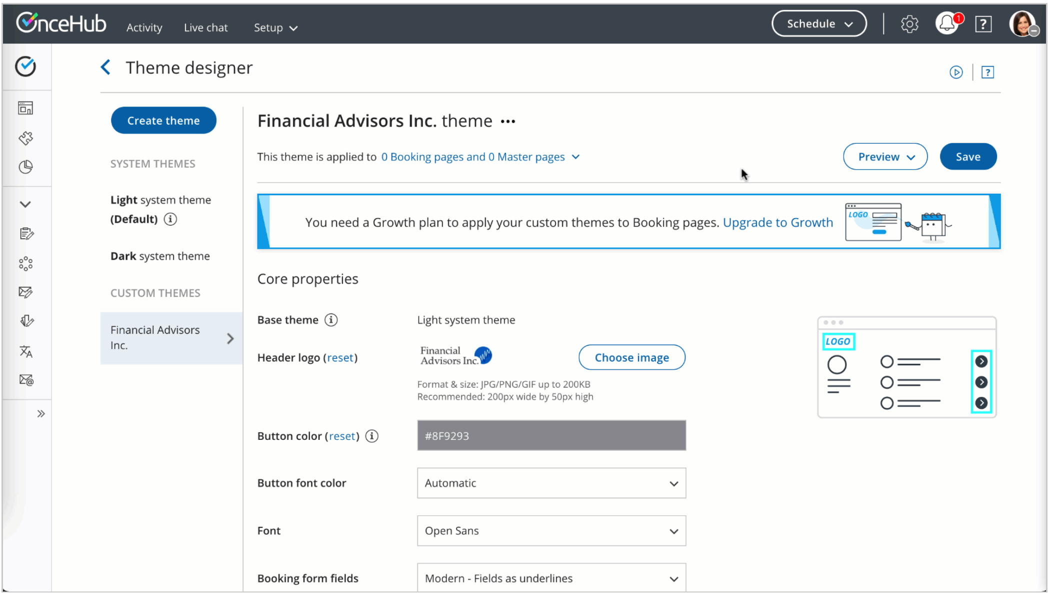


Figure 1: Previewing a theme

Newly created Booking pages and Master pages are automatically assigned the default theme. You can change the default theme by clicking **Set as default theme** next to the name of a theme (Figure 2).

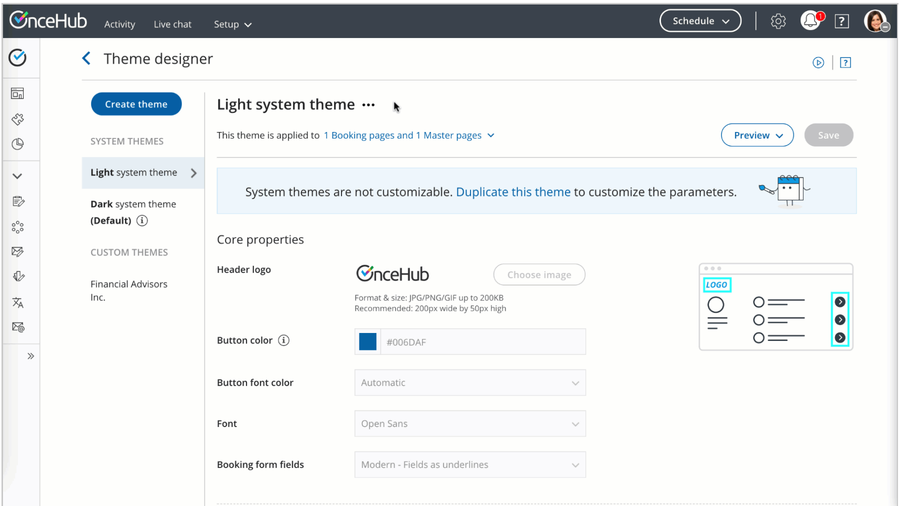


Figure 2: Set as default theme

Theme properties

The specific design of a theme comes from the properties which you can define in four sections of the Theme designer:

- Core properties
- Page background
- Interaction pane
- Information pane

Learn more about Theme properties

Applying a theme

Last Modified on Oct 12, 2022

The Theme designer allows you to fully customize the look and feel of your Booking pages and Master pages.

Themes are applied to each Booking page and Master page individually. However, applying a theme to a Master page always overrides the themes applied to the Booking pages included in that Master page.

Themes determine the logo, branding. and look and feel of your Booking pages and Master pages. Any changes made to a theme that has already been applied to a page are immediately visible on the Customer app.

Applying a theme

You can apply a theme in a couple places: on the relevant **booking page** or on the relevant theme in the Theme designer.

Apply a theme directly to a page

1. Go to **Booking pages** in the bar on the left.
2. Select the Booking page or Master page for which you want to change the theme.
3. In the **Overview** section, select a theme from the **Theme** drop-down menu (Figure 1).

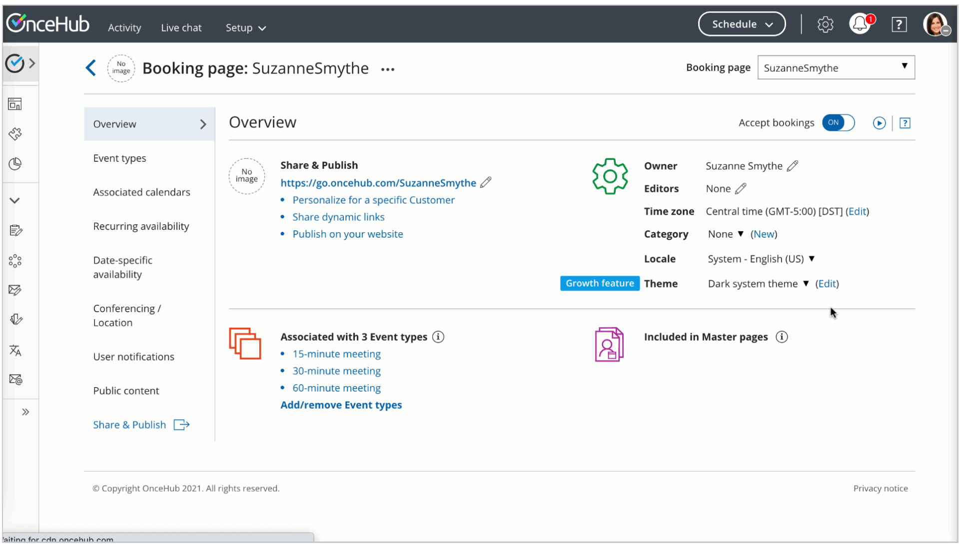


Figure 1: Apply a theme directly to a page

Apply on a specific theme

1. Go to **Booking pages** in the bar on the left.
2. On the left, select **Theme designer**.
3. Select the theme you want to apply.
4. In the three-dot menu, click on **Apply** (Figure 2).
5. Select the relevant page(s) you want to use that theme and select the **Apply** button.

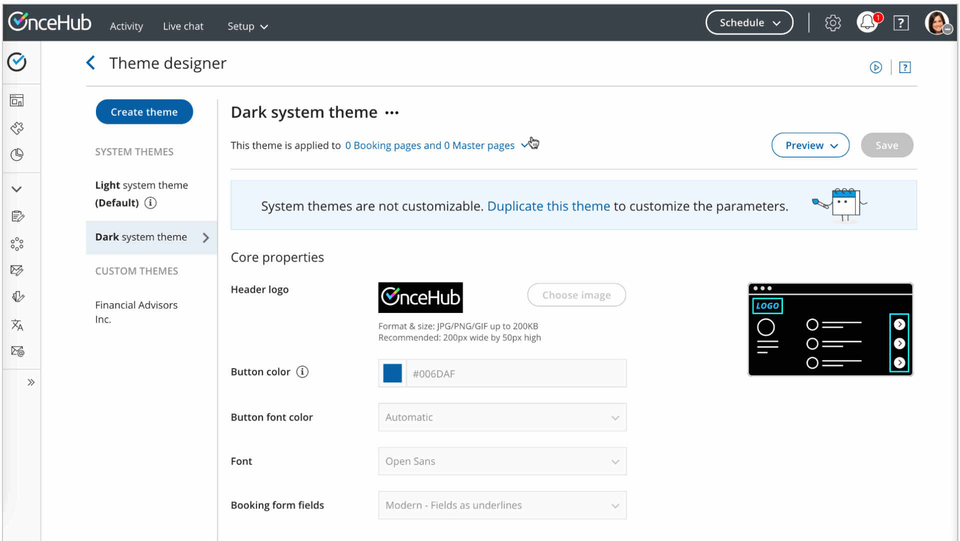


Figure 2: Apply a theme

Your default theme

In the Theme designer, you can set a default theme that applies to any newly created Booking page or Master page.

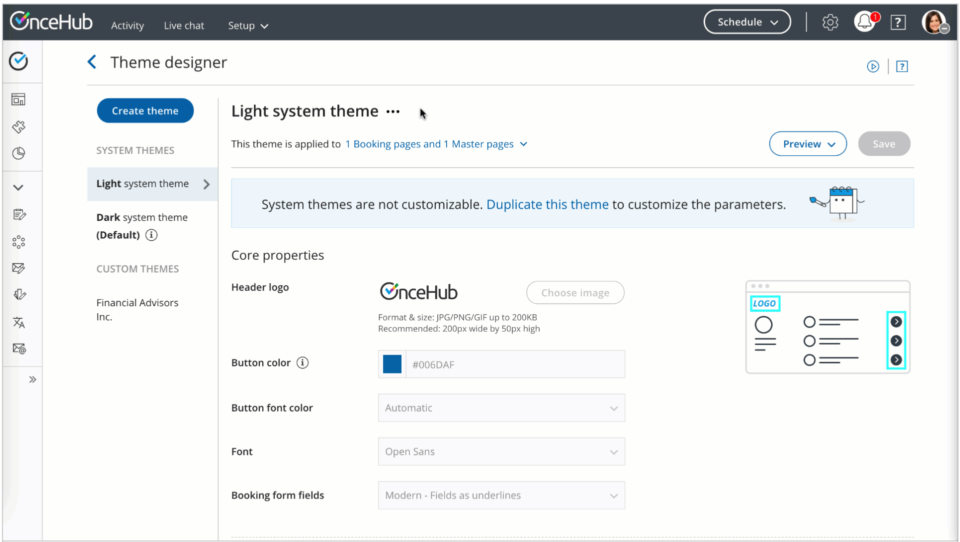


Figure 3: Apply a default theme

System themes

Last Modified on Jun 5, 2023

The OnceHub Theme designer provides two system themes for your Booking pages and Master pages. You can use these themes as they are, or adjust them according to your needs.

In this article, you'll learn about System themes.

Editing a system theme

1. Go to **Setup -> OnceHub setup** and open the lefthand sidebar.
2. In the **Tools** section, select **Theme designer**.
3. Select a System theme from the list on the left hand side of the page (Figure 1).

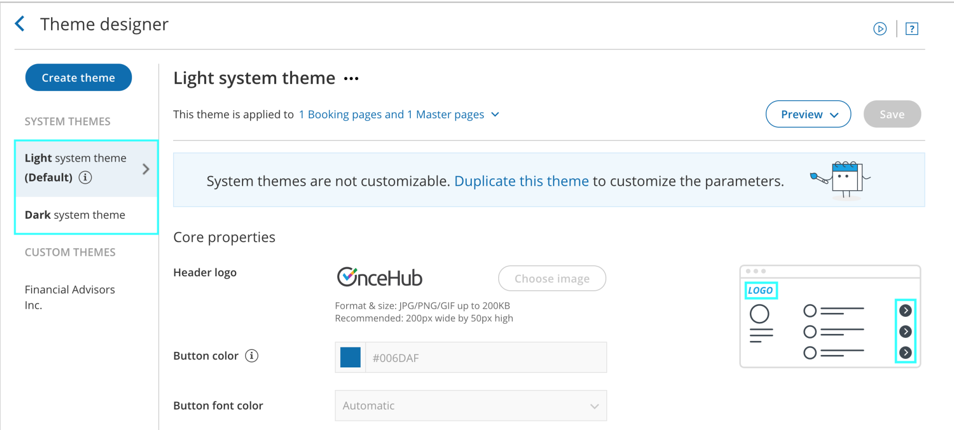


Figure 1: Select a System theme

4. If required, you can add a **header logo**, edit the **button color**, and edit the **button font color**.
5. When you're done making changes, click **Save**.

Theme properties of a System theme

You can customize the following Theme properties of a System theme:

- **Header logo:** This image is visible to your Customers.
- **Button color:** This is the color of the buttons and other properties on your page. It is intended to attract your Customer's attention to specific elements.
- **Button font color:** This can be used to maximize contrast against the button background color. We recommend keeping it on **Automatic**.

Note:

If you want to customize additional Theme properties, you'll need to create a Custom theme.

You may need to upgrade your plan to apply a custom theme to your page(s).

Previewing and applying a System theme

To preview a theme on a Booking page or Master page, select it from the drop-down menu in the top right of the Theme designer and click the **Preview** button (Figure 2). Previewing a theme does not apply the theme to the page.

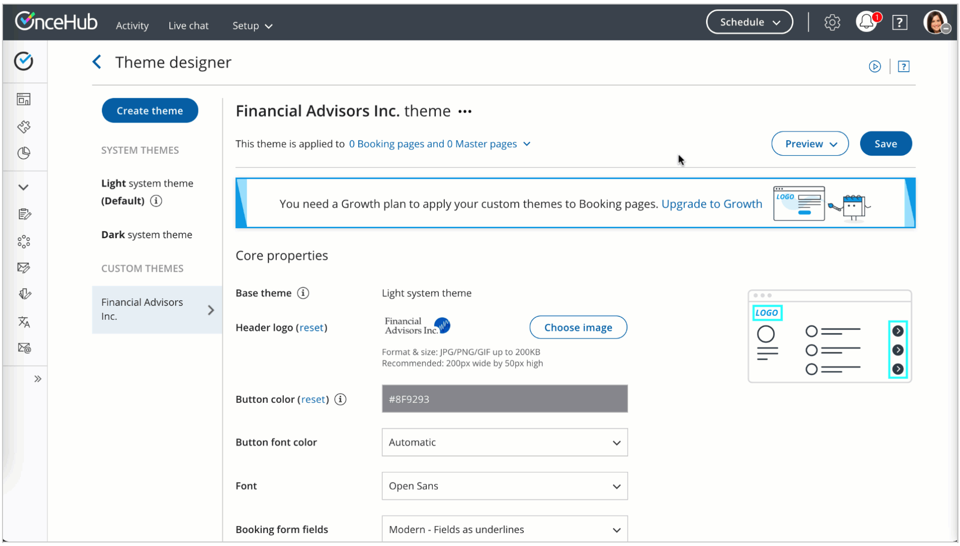


Figure 2: Preview a System theme

[Learn more about applying a theme]

Default theme

You can set any theme as your default theme, including a system theme. The default theme is automatically applied to all newly created pages, but not to existing pages.

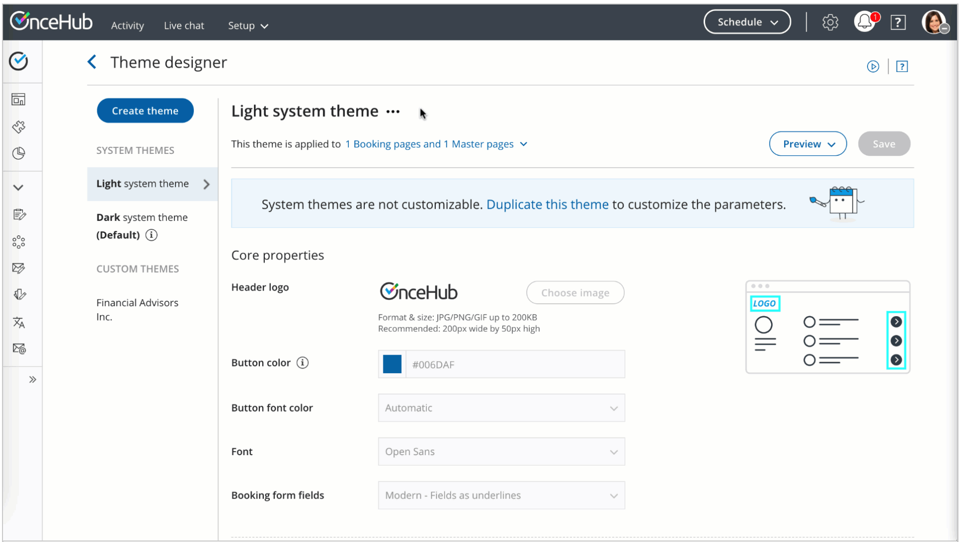


Figure 3: Set as default theme

Available System themes

- **Light** (This is the default theme)

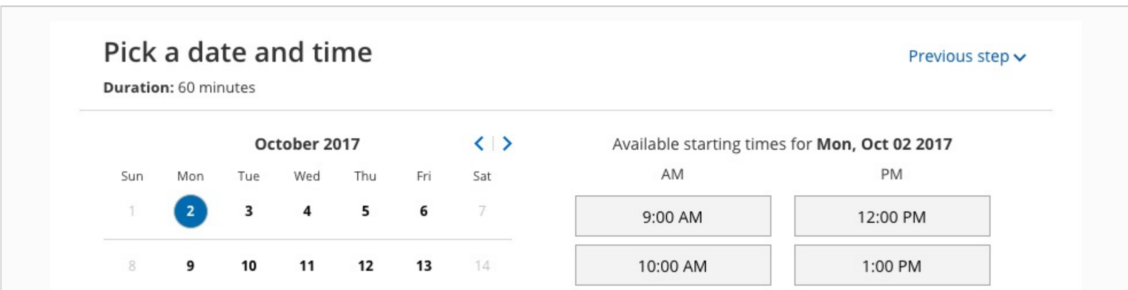


Figure 4: Light system theme

- **Dark**

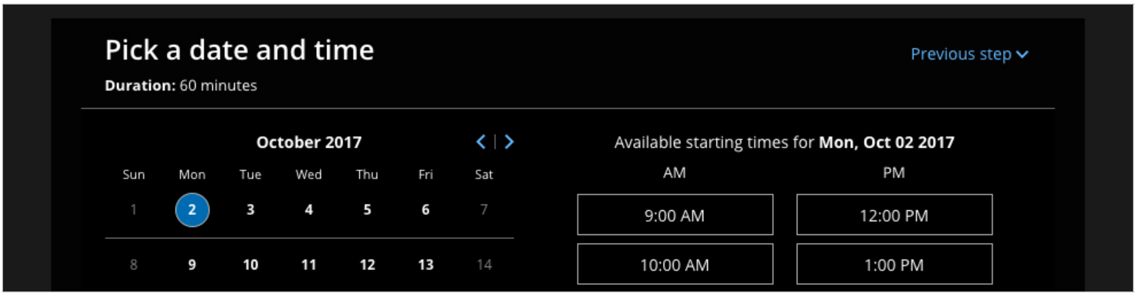


Figure 5: Dark system theme

Custom themes

Last Modified on Oct 12, 2022

The Theme designer allows you to fully customize the look and feel of your Booking pages and Master pages.

The Theme designer comes with two system themes. If you need more customization for your theme, you can create a custom theme by duplicating an existing theme and modifying it, or you can create a new custom theme from scratch.

You do not need an assigned product license to create custom themes in the Theme designer. Learn more

However, you may need to upgrade your plan to apply a custom theme to your page(s).

In this article, you'll learn about creating a custom theme.

Creating a custom theme

1. Go to **Booking pages** in the bar on the left.
2. On the left, select **Theme designer**.
3. Click the **Create theme** button on the top left corner.
4. In the **Create theme** pop-up, enter a **Theme name** and select a **Base theme** for your new Custom theme. Then click **Create**.

> **Note :**
>
> The **Base theme** cannot be changed once the theme is created.

5. Alternatively, you can duplicate an existing theme by clicking the **Duplicate theme** button (Figure 2).

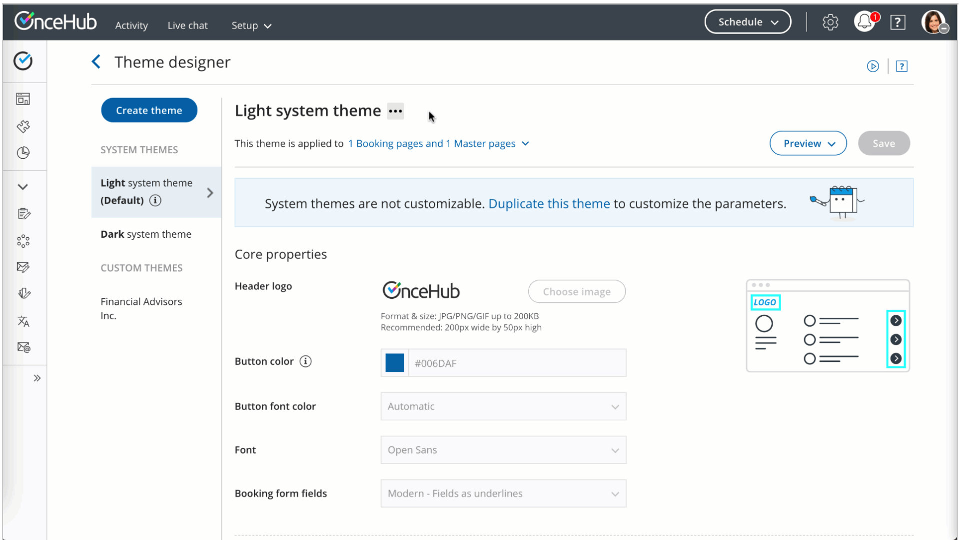


Figure 2: Duplicate theme button

6. Configure your custom theme as required by modifying the Core properties (Figure 3), Page background properties, Interaction pane properties, and Information pane properties. Learn more about Theme properties

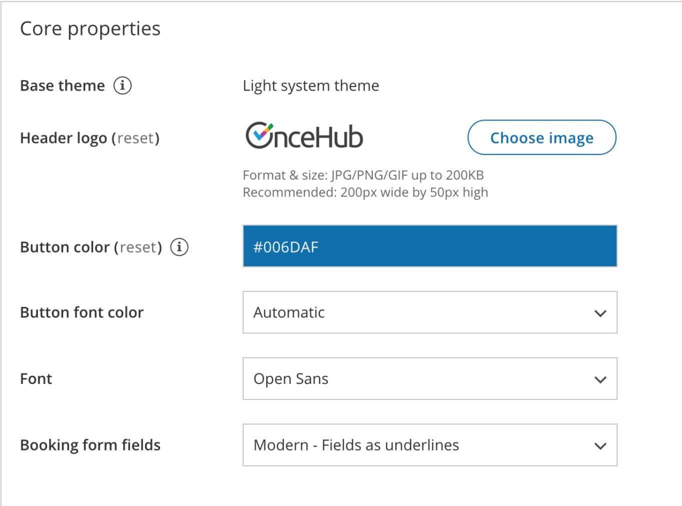


Figure 3: Core properties

7. Click **Save**.

Default theme

You can set any theme as your default theme, including a system theme. The default theme is automatically applied to all newly created pages, but not to existing pages.

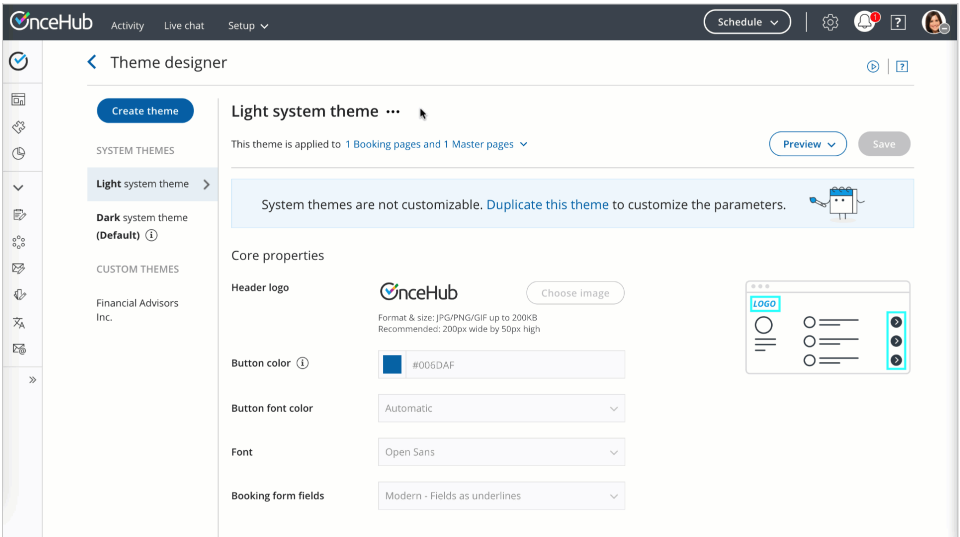


Figure 4: Default theme

Previewing and applying a Custom theme

You can preview a theme on a Booking page or Master page by selecting it from the drop-down menu in the top right of the Theme designer and clicking the **Preview** button (Figure 4). Previewing a theme does not apply the theme to the page.

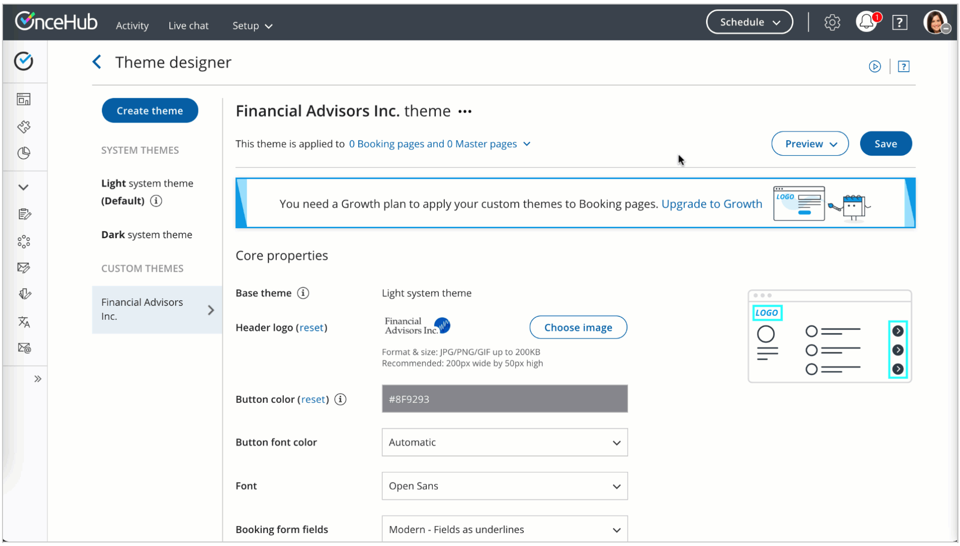


Figure 5: Previewing a theme

Once you're happy with it, you can apply the theme.

Theme properties

Last Modified on Jun 5, 2023

The OnceHub Theme designer allows you to fully customize the look and feel of your Booking pages and Master pages.

The specific design of a theme comes from the properties you can define in four sections of the Theme designer:

- Core properties
- Page background
- Interaction pane
- Information pane

Note:

System themes allow you to define the **Header logo**, **Button color**, and **Button font color** of the theme. If you'd like to define more properties, you'll need to create a custom theme.

In this article, you'll learn about Theme properties.

Core properties

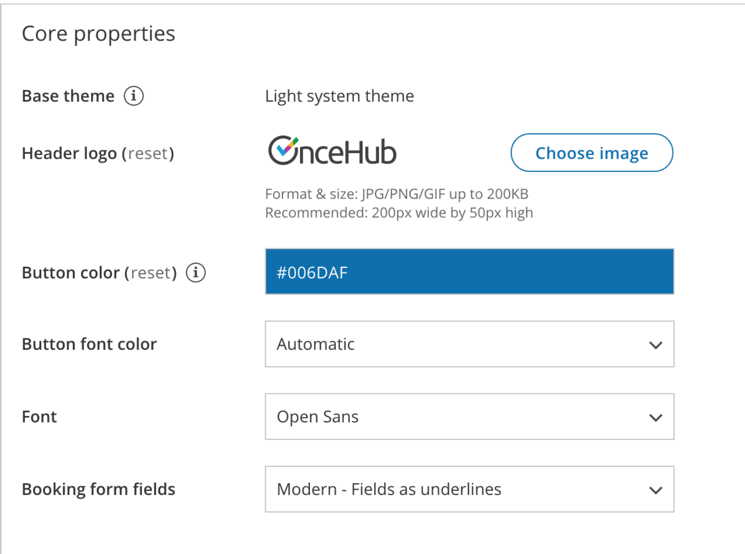


Figure 1: Core properties for a Custom theme

The Core properties of a theme define the base theme color palette, the font of the theme, button and font colors, and the style of the Booking form fields.

- **Base theme:** Each theme is based on either the Light color palette or Dark color palette. This cannot be changed once the theme is created.
- **Header logo:** The Header logo visible to your Customers on the Booking page. The recommended size of the Header logo is 200px wide by 50px high.
- **Button color:** The background color of buttons and other key components on your page.
- **Button font color:** The color of text on buttons can be set either automatically (to maximize contrast against the Button background color), or manually to white or black.
- **Font:** The font family to be used across the Customer booking process.

- **Booking form fields:** The style can be either Modern (fields as underlines) or Classic (fields as boxes). Modern form fields are selected by default.

Page background

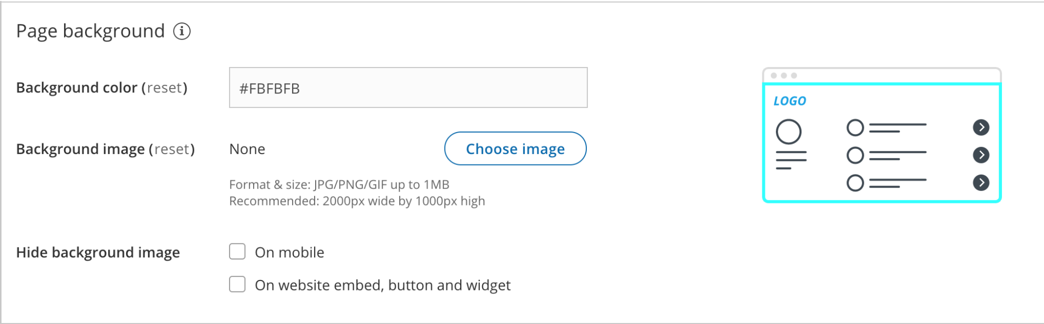


Figure 2: Page background properties

- **Background color:** This color will show when no background image is selected, before the background image is loaded, and when the background image is hidden.
- **Background image:** You can upload any background image, texture, or pattern. The image may appear cropped in order to always cover the entire background of the browser window. The recommended size for your background image is 2000px wide by 1000px high.

> **Note:**
>
> You should make sure that you own the copyright to an image, texture, or pattern before using it as a background image.

- **Hide background image:** You may want to hide the background image on mobile devices or when your Booking page is integrated into your website.

Interaction pane

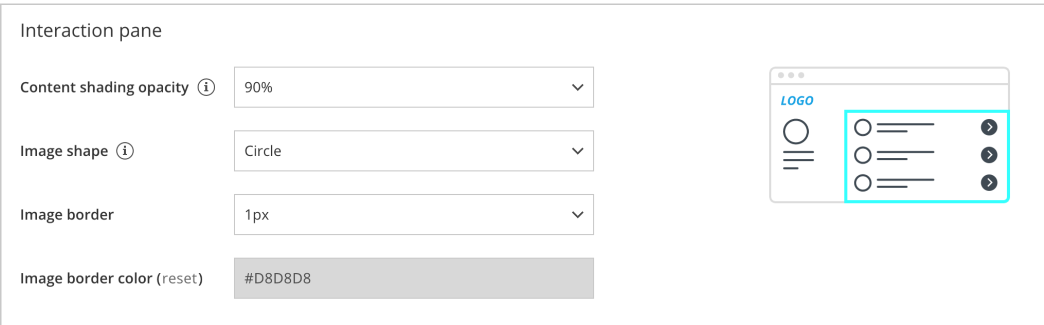


Figure 3: Interaction pane properties

The Interaction pane of your Booking page or Master page is where the scheduling process takes place. This is where your Customers selects a Booking page or Event type, selects a time, and fills out the Booking form.

- **Content shading opacity:** Determine the opacity to optimize the readability of text over your background image or background color.
- **Image shape:** Apply a uniform shape or mask to all of the images that you uploaded for the Public content sections of your Event types and Booking pages. You can choose for the shape of your images to be a **Circle**, **Rounded square**, **Square**, or to use **No mask** on your images.
- **Image border:** Apply a uniform border width to all of your images.

- **Image border color:** Apply a uniform border color to all of your images.

Information pane

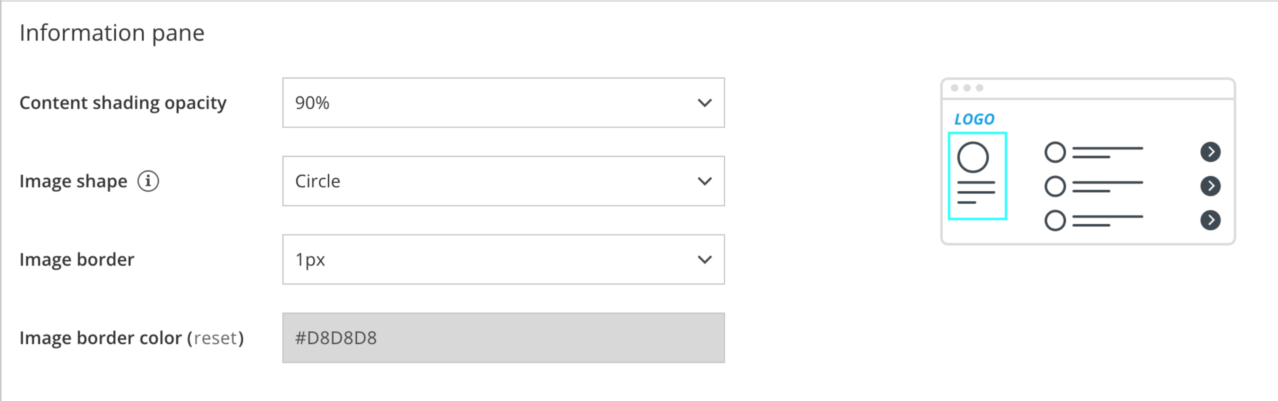


Figure 4: Information pane properties

The Information pane displays the information about your Booking page or Master page. It includes the page's image, description, and contact information.

- **Content shading opacity:** Determine the opacity to optimize the readability of text over your background image or color.
- **Image shape:** Apply a shape or mask to the image that you uploaded for the Public content section of your Booking page or Master page. You can choose for the shape of your images to be a **Circle**, **Rounded square**, **Square**, or to use **No mask** on your images.
- **Image border:** Apply a border width to this image.
- **Image border color:** Apply a border color to this image.

Adding your logo

Last Modified on Jun 5, 2023

The Theme designer allows you to fully customize the look and feel of your Booking pages and Master pages.

You can add your logo to your Booking pages from the Theme designer. Your logo can be added to any of the out-of-the-box System themes, or any Custom theme that you create. Your Customers will see your logo in the top left corner of the page when they access your Booking pages or Master pages, ensuring that the scheduling experience is completely under your brand.

You do not need an assigned product license to update the Theme designer, create custom themes, or update a Booking page's theme. Learn more

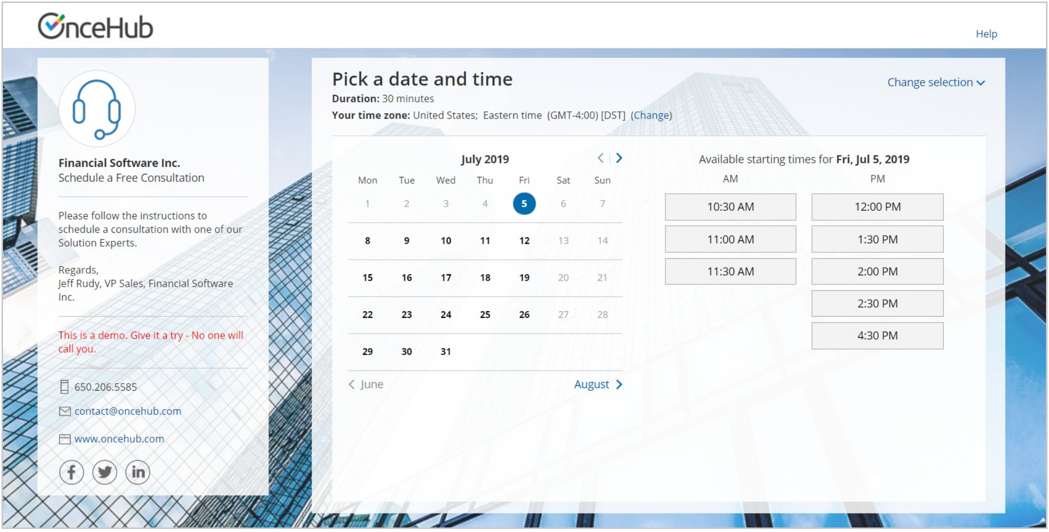


Figure 1: Booking page with OnceHub logo

Adding your logo to a theme

1. Go to **Booking pages** in the bar on the left .
2. On the left, select **Theme designer**.
3. Select the System theme or Custom theme that you would like to add your logo to (Figure 1).

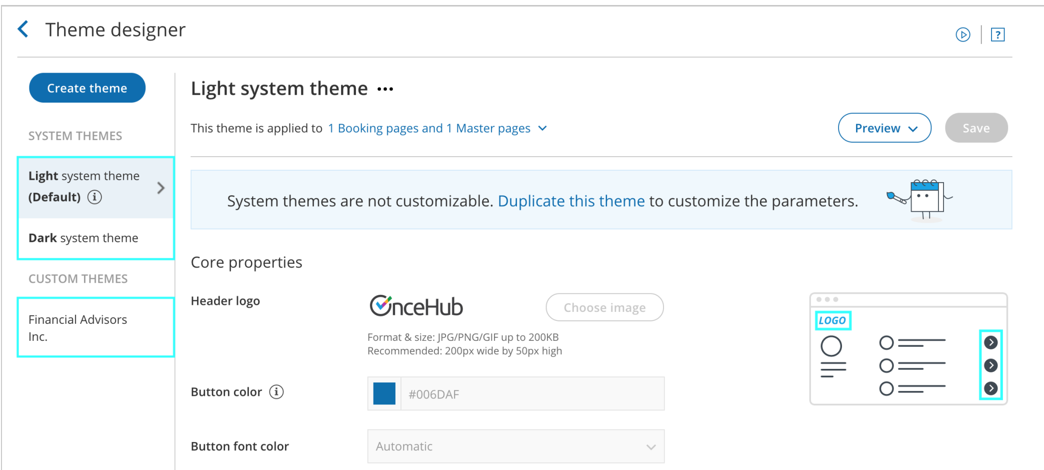


Figure 1: Selecting a theme

4. In the **Core properties** section, click the **Choose image** button (Figure 2).

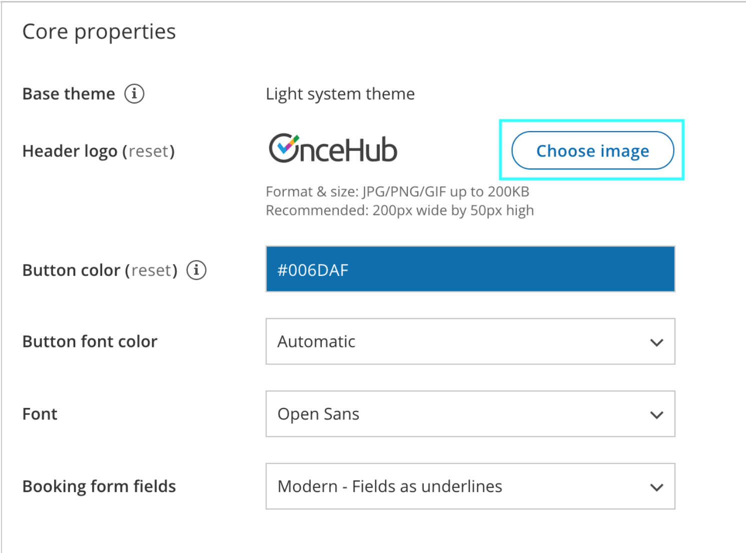


Figure 2: Choose an image for your Header logo

5. Select the image that you would like to use for your Booking page logo. The recommended size of the **Header logo** is 200px wide by 50px high.

If you would like to use different branding for different Booking pages, you can create multiple themes with different logos. Each of your Booking pages can have its own theme with its own logo.

Using a link with your logo

You can also define a link for your logo in your Booking page's Public content section or your Master page's Public content section.

If your Customer clicks on the logo on your Booking page or Master page, a new tab will open with the website you defined.

Note:

If you have added a website to the Public content section of your Master page, it will override any website added in the Public content section of any Booking pages you include in the Master page.

Image and Icon gallery

Last Modified on Jun 5, 2023

The image gallery contains images that you can use for your Event types, Booking pages, and Master pages.

Note:

All images in this gallery are property of OnceHub and are protected under copyright law. Use is permitted for your OnceHub Event types, Booking pages, and Master pages only.

How to use the image gallery

1. To download an image in this article, right click it and select **Save image as...** from the menu.
2. Save the image on your computer.
3. Upload the image by clicking **Choose file** in the Public content section of an Event type, Booking page, or Master page (Figure 1).

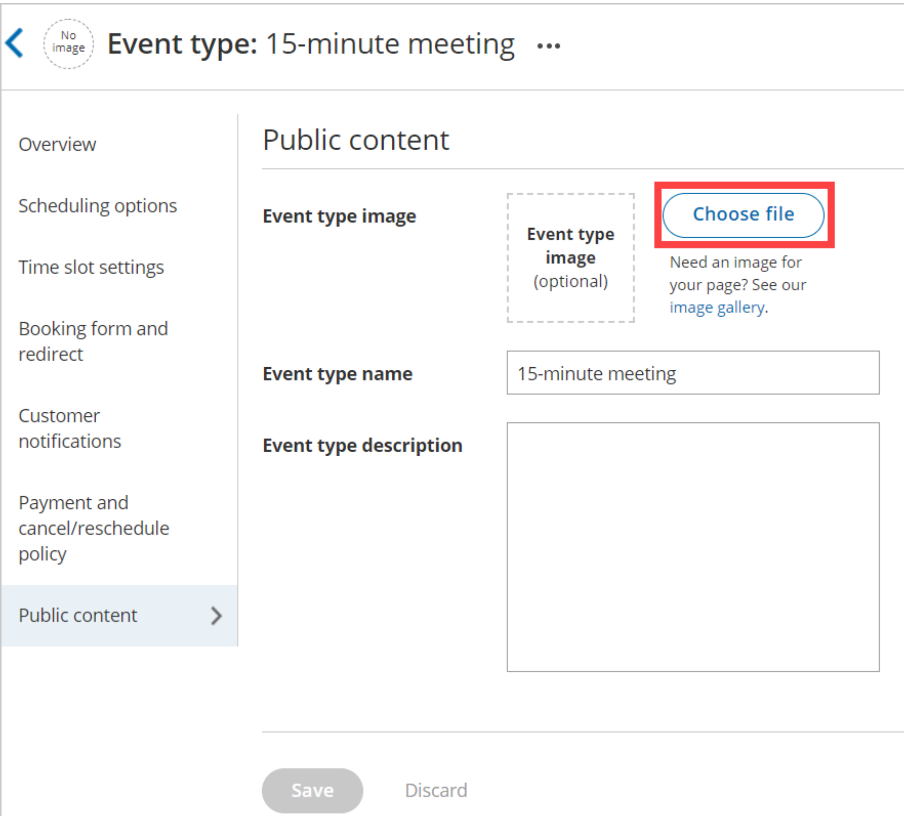
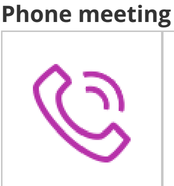
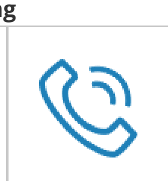


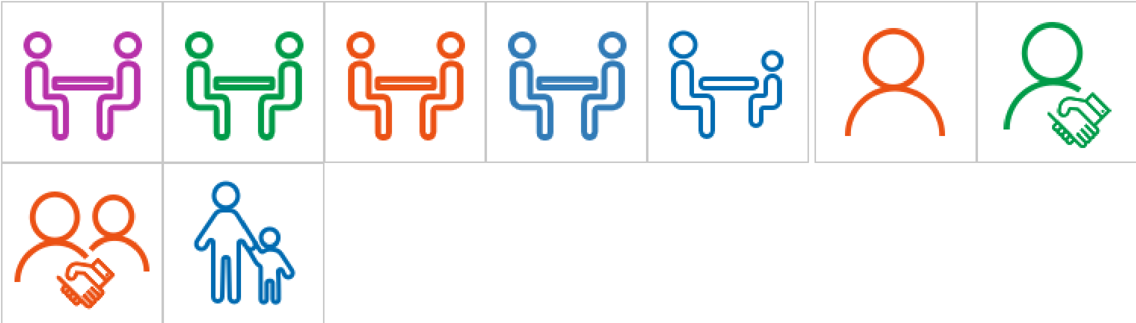
Figure 1: Event types Public content section

Image gallery

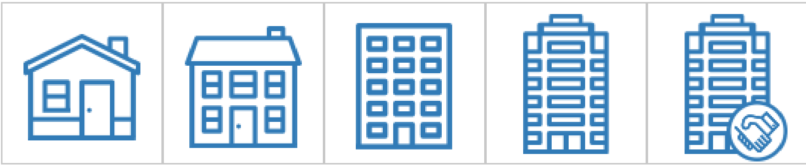
Phone meeting

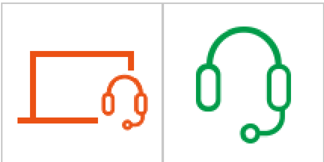
Face-to-face meeting



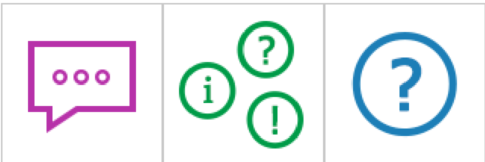
Office meeting



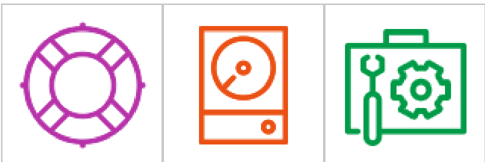
Web conference



Inquiries

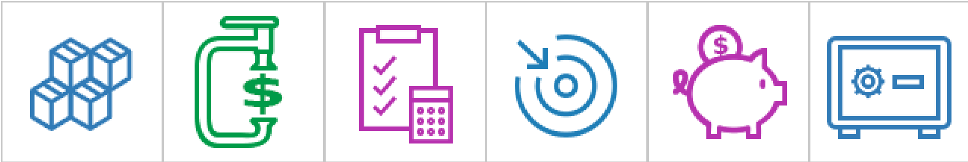


Technical Support



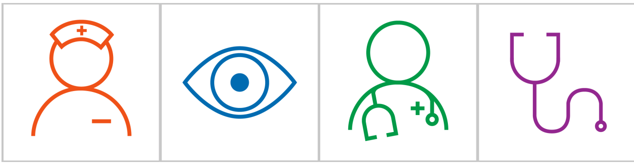
Coaching

Sales/Financial



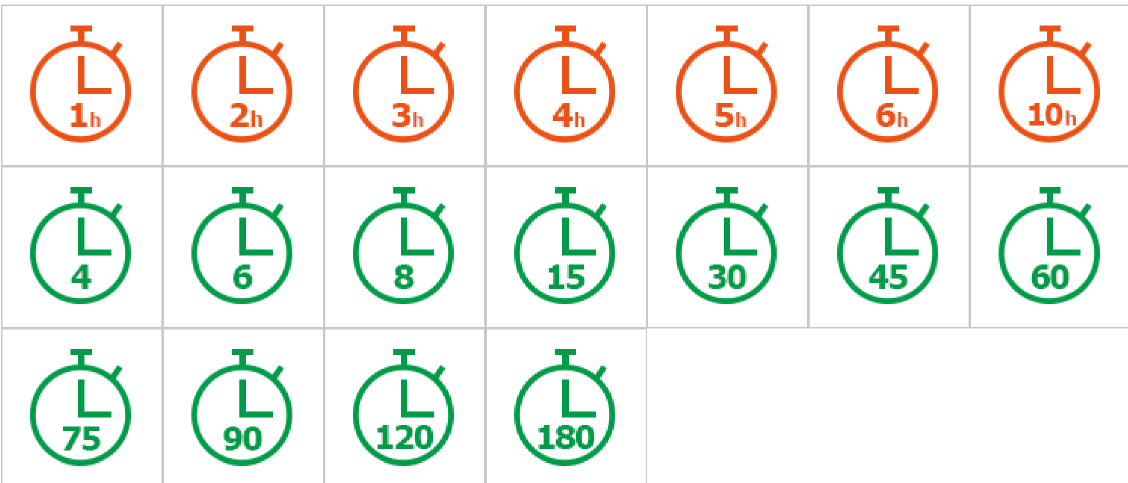
Education/eLearning

Health and medical

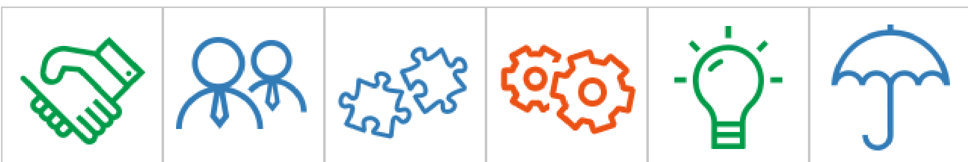


Geographic regions

Duration



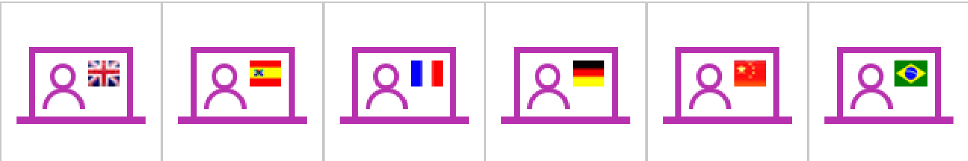
Miscellaneous



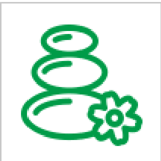
Legal

Conference rooms

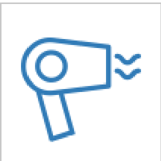
Language tutoring



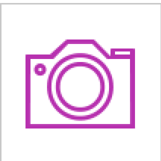
Massage



Hair Salon



Photographer



Are you looking for other icons for your Booking or Master pages? Please let us know.

Creating and editing a Booking form

Last Modified on Nov 17, 2022

You can use the Booking forms editor to customize the information that you want to collect from your Customers during the booking process. You can choose the questions on the Booking form and the order that they're presented in.

If you are working with multiple Booking pages, you can create a different Booking form for each Booking page. If your business needs are the same for all of your Booking pages, or if you're only using one Booking page, you can create one Booking form.

In this article, you'll learn about creating and editing a Booking form.

Accessing the Booking forms editor

To access the Booking forms editor, go to **Booking pages** in the bar on the left. On the left, select **Booking forms editor**.

Default Booking form settings

When you open the Booking forms editor for the first time, you'll see the **default Booking form** (Figure 1).

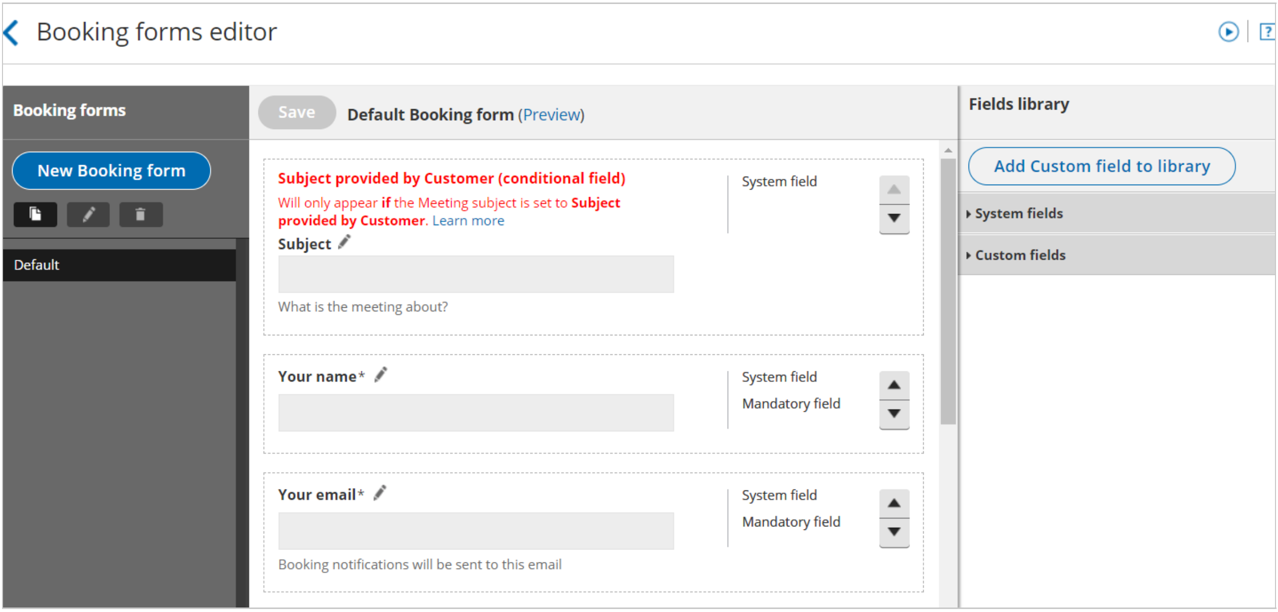


Figure 1: Default Booking form

The default Booking form includes the following fields:

- Subject (Conditional field)
- Your name
- Your email
- Your mobile phone
- Location (Conditional field)
- Your note

When you create a new Booking form, these six fields will be included. You can remove most of these fields and add others as needed.

Note:

Accounts created before July 23, 2020 include eight fields in their default Booking form, rather than six. The additional fields are:

- Your company
- Your phone

Creating a new Booking form

There are three ways to customize the Booking form: Editing the Default Booking form, creating a new Booking form, or copying and editing an existing Booking form.

Editing the Default Booking form

If you want every Booking page on your account to use the same Booking form, this is a good option. This ensures that Users will not accidentally select the wrong Booking form.

Creating a new Booking form

To create a new Booking form, click the **New Booking form** button (Figure 2) in the **Booking forms** menu on the left hand side of the page. The new Booking form will have the Default Booking form settings. This is a good option if you want to start from scratch.

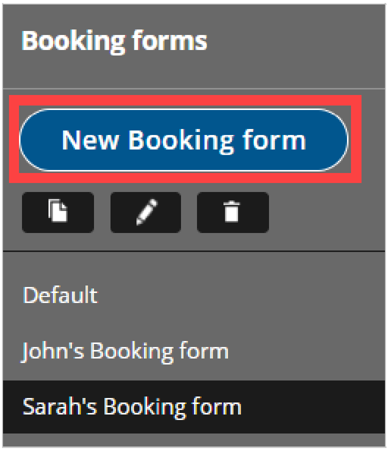


Figure 2: New Booking form button

Copying an existing Booking form

To copy an existing Booking form, click the **Copy** button (Figure 3) in the **Booking forms** menu on the left hand side of the page. The new Booking form will be an exact copy, which you can customize further as needed. This is a good option if you've already created a Booking form that you like and want to edit it slightly.

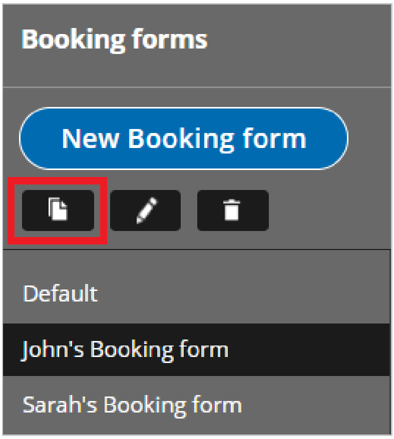


Figure 3: Copy an existing Booking form

Editing a Booking form

You can edit, add, and remove the content of your Booking forms in the middle editing pane.

Adding fields to your Booking form

To add a field to the Booking form, click the arrow icon on the specific field in the Fields library (Figure 4).

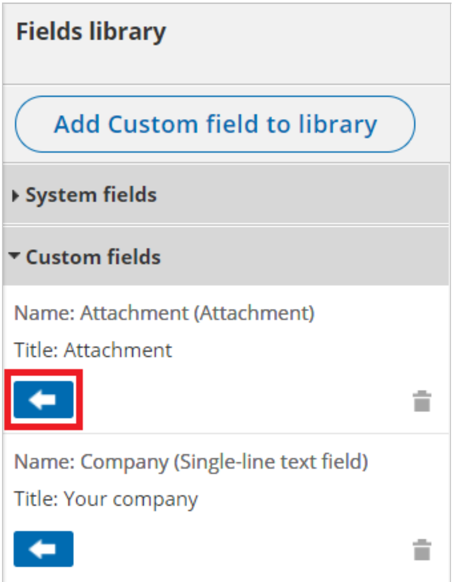


Figure 4: Add fields to your Booking form

Removing fields from your Booking form

To remove a field from the Booking form, click **Remove field** next to the specific field (Figure 5).

Figure 5: Remove a field from your Booking form

Note:

The **Email** and **Name** fields cannot be removed because OnceHub needs this basic information in order to confirm the booking with your Customer.

Editing text

To edit the **Field title** and **subtext**, click the **Edit** icon next to the Field name (Figure 6).

Figure 6: Edit icon

The **Edit field** pop-up will appear (Figure 7).

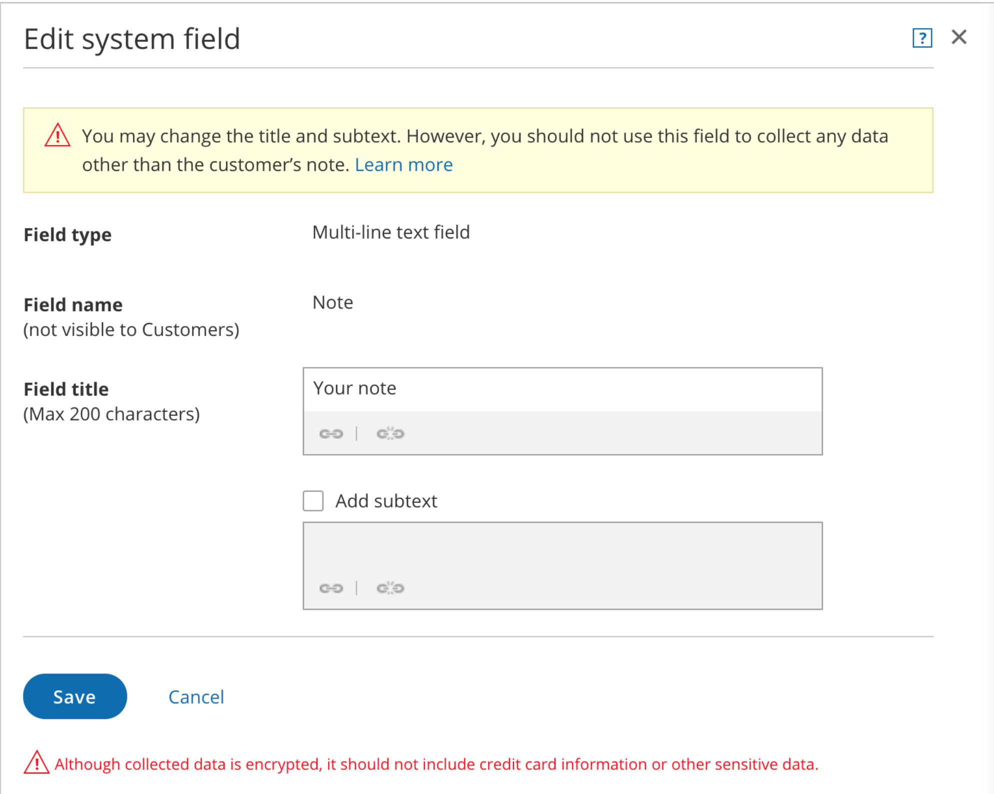


Figure 7: Edit field pop-up

- **Field title:** This is the title that will be displayed to Customers.
- **Subtext:** Check the **Add subtext** box to add subtext to the field. Subtext can help explain the information being collected in the field, or why you are asking your Customers for this information.

Click the **Link** icon to add a link to any of the text you edit.

Learn more about editing System fields

Learn more about creating and editing Custom fields

Choosing the order of your fields

To change the order in which your fields appear, click the up or down arrow on the right side of each field to move it.

Choosing which fields will be mandatory

Check the **Mandatory field** box to make the field mandatory (Figure 8). The Customer must fill out all Mandatory fields in order to make a booking. Uncheck the **Mandatory field** box to make a field optional.

Figure 8: Mandatory field box

Previewing your Booking form

You can review your Booking form anytime by clicking the **Preview** link at the top of the Editing pane (Figure 9).

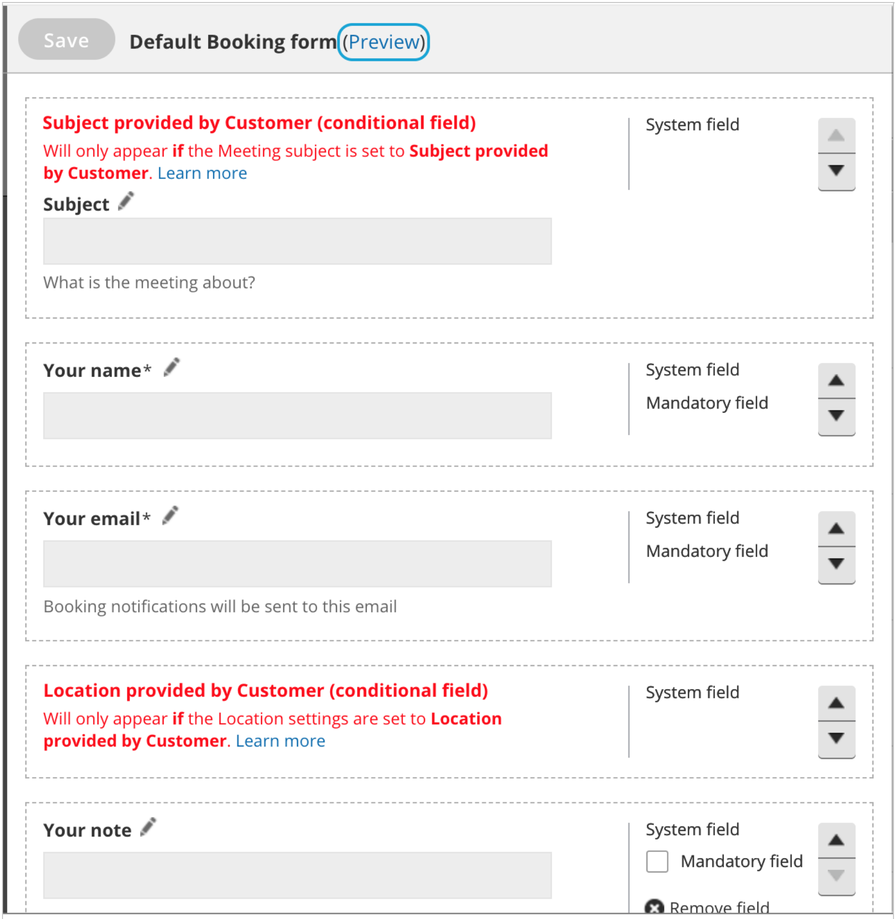


Figure 9: Click Preview to see a preview of your Booking form

When you're done editing your Booking form, click **Save**.

Managing Booking forms

In the **Booking forms** menu on the left hand side of the page, you will see a list of the Default Booking form provided by OnceHub and any custom Booking forms that you or other Users have created.

- **Rename:** To rename the selected Booking form, click the **Rename** button (Figure 10). The Default Booking form cannot be renamed.

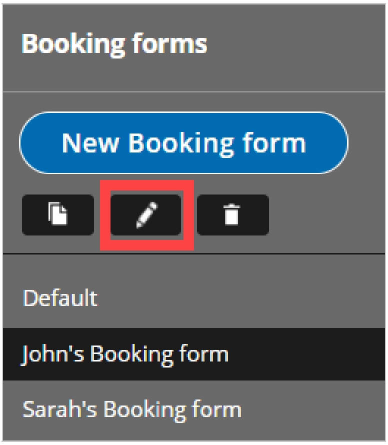


Figure 10: Rename button

- **Delete:** To delete the selected Booking form, click the **Delete** button (Figure 11). This action cannot be undone. The Default Booking form cannot be deleted.

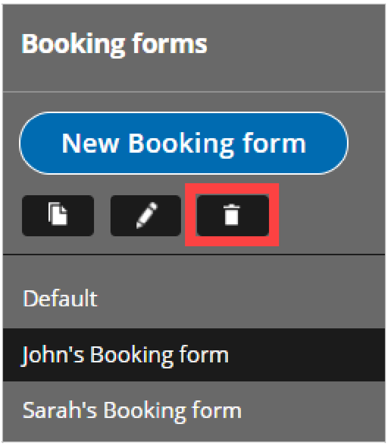


Figure 11: Delete button

Adding a Booking form to a Booking page

Once you've created a Booking form, you'll need to add it to your Booking page. If your Booking page is associated with at least one Event type, then the **Booking form and redirect** section will be on the Event type. Learn more about the location of the Booking form and redirect section

1. Go to **Booking pages** in the bar on the left.
2. Select the relevant Event type in the **Event types** pane.
3. In the **Booking form and redirect** section, select the Booking form you've just created from the **Booking form** drop-down menu.

If your Booking page is not associated with any Event types, the **Booking form and redirect** section will be on the Booking page.

1. Go to **Booking pages** in the bar on the left.
2. Select the relevant Booking page in the **Booking pages** pane.
3. In the Booking form and redirect section, select the Booking form you've just created from the **Booking form** drop-down menu.

The Fields library

Last Modified on Jun 5, 2023

The Fields library contains all of the fields that are available for you to use in the Booking form. This is where you add fields to your Booking form and create your own Custom fields.

In this article, you'll learn about the different types of fields stored in the Fields library.

System fields

The System fields category includes seven fields. Four are included on all new Booking forms by default.

Required fields

- Your name
- Your email

The Customer's name and email address must be collected in order for OnceHub email notifications to be sent to your Customers. You cannot remove these fields from the Booking form, and the Customer must fill them out in order to make a Booking.

Optional fields

- Your company: This field can be added to any Booking form when you want the Customer to add their company.
- Your phone: This field can be added to any Booking form when you want the Customer to add their phone number but don't require a mobile phone number.
- Your mobile phone: Included on default booking form.
- Your note: Included on default booking form.
- Customer guests: This field can be added to any Booking form when you want to allow the Customer to invite additional guests at their discretion.

These fields can be removed from the Booking form, but cannot be deleted from the Fields library.

Learn more about System fields

Conditional fields

Conditional fields are fields that will only show on the Booking form if you choose to ask the Customer to provide the data. The Conditional fields are:

- Meeting subject
- Location

Learn more about Conditional fields

Custom fields

The Custom fields category includes fields created by you from scratch. This category also includes System custom fields, which are optional fields available to you in the Fields library. For example, "Your state" is a System custom field. This field includes a dropdown menu of all 50 states in the United States which can be inserted into your Booking form.

Learn more about Custom fields

Editing System fields

Last Modified on Nov 16, 2023

System fields are seven standardized fields. Four are included in every new Booking form by default.

In this article, you'll learn about editing System fields.

System fields

- Your name
- Your email
- Your company (not included in the default Booking form)
- Your phone (not included in the default Booking form)
- Your mobile phone
- Your note
- Customer guests (not included in the default Booking form)

> **Note:**
>
> If you want to ask for information that is not included in the System fields or Custom fields, you can create your own Custom field. Learn more about Custom fields

Editing System fields

1. Go to **Booking pages** in the bar on the left.
2. On the left, select **Booking forms editor**.
3. Click the **Edit** icon next to the field name you want to edit in the Booking form (Figure 1).

Figure 1: Click the Edit icon to edit a field

4. The **Edit system field** pop-up will appear (Figure 2). Here, you can edit the **Field title** and **Add subtext**.

When you edit a System field, you are editing that field only for the specific Booking form you are working on at that time. If you close the Booking form and edit the same field in a different Booking form, the changes you make are applied to only this new Booking form.

In contrast, Custom fields are edited in the Fields library, so any change made to the field is applied to every Booking form which includes the field. Learn more about Custom fields

> **Note:**
>
> You cannot edit the options in a System field drop-down menu. To customize drop-down menu options, create a Custom field.

Field title

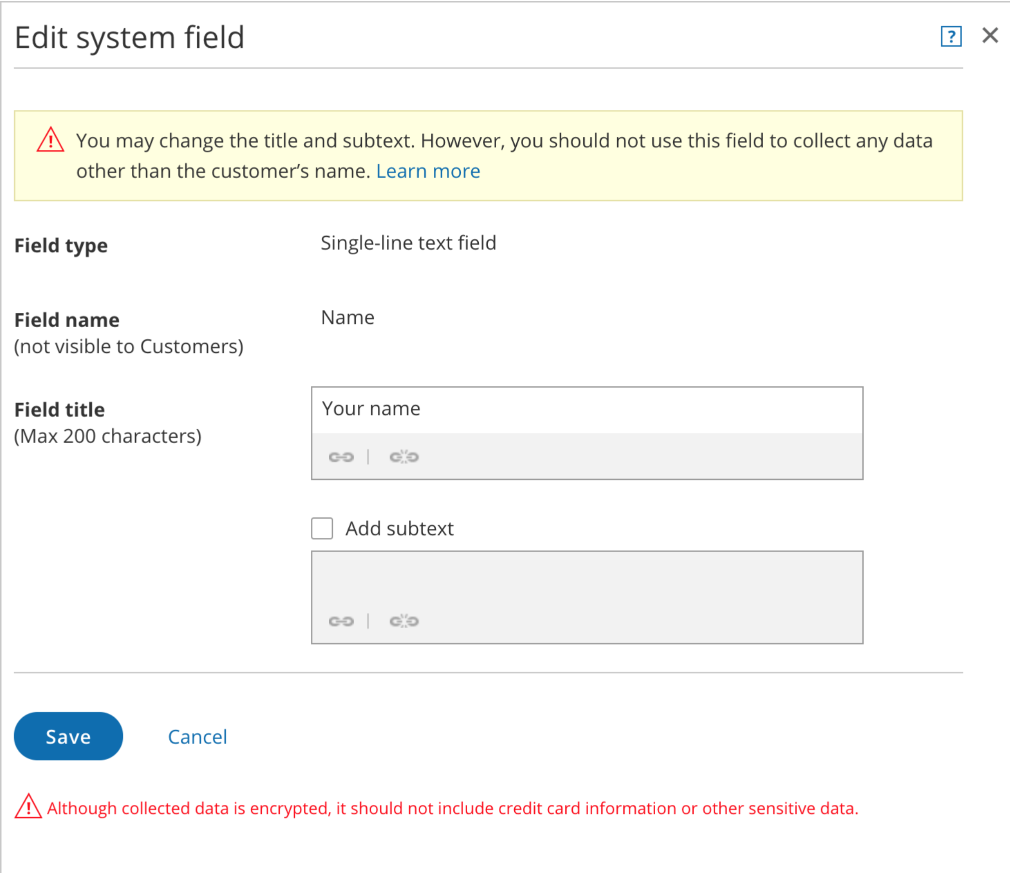


Figure 2: Edit system field pop-up

The **Field title** is the name of the field as it will appear to Customers on the Booking form. For example, you can change the “Your name” field to say “First and last name." If you don't enter any text for the **Field title**, the **Field name** will be used.

Important:

You should not use a System field to collect information other than what it is intended for. For example the “Your name” field should only be used to ask for the Customer’s name and the “Your phone” field should only be used to ask for a phone number.

Using these fields to collect information other than what is intended can break the scheduling process. For example, if you change the Field title of the email field to ask for something else, your Customer will not receive email notifications about the booking they made.

Add subtext

To add subtext to a field, check the **Add subtext** box. Then, enter a description of the field or explain why you are asking for the information.

For example, if you are asking for the Customer’s phone number, you can use this space to explain how you are going to use the phone number. You can also hyperlink text. For example, you could link to your Terms of service.

Require email verification for the email System field

If you are worried about Customers mistyping their email address when making a booking, you can turn on the **Email verification** option in the email **Edit system field** pop-up for the **Emai**l field (Figure 3).

When enabled, the Customer will be asked to enter their email address a second time and allow OnceHub to verify that both email addresses match.

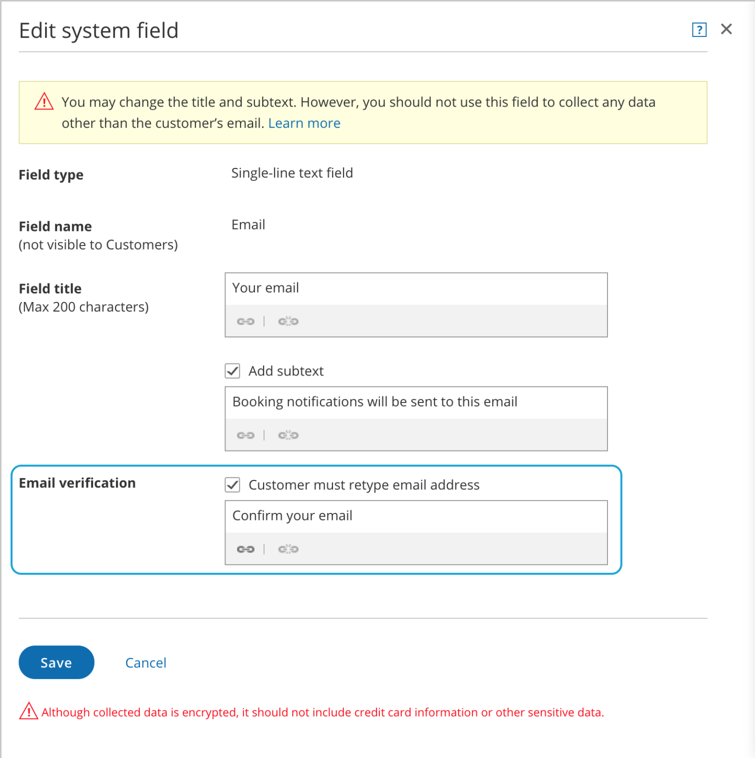


Figure 3: Require email verification for the email System field

Enable SMS notifications for the Mobile phone System field

If you want to send booking-related SMS notifications to your Customers, you must provide them with an option to opt out of this service.

To do this, check the **Enable SMS** box in the **Booking forms editor**. Check the **OK to send me booking notifications via SMS** checkbox. The default is that the customer has to opt out of SMS notifications.

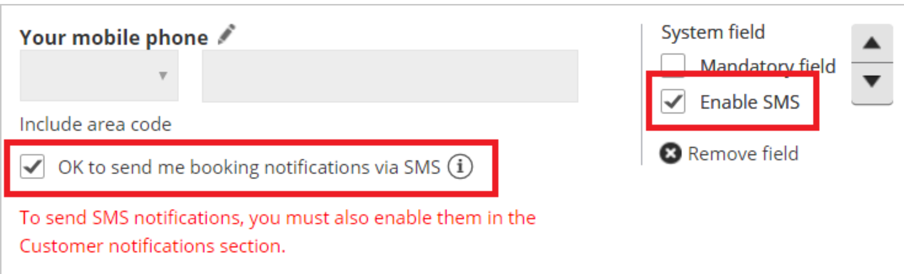


Figure 3: Enable SMS notifications for the Mobile phone System field

When you enable this option, your Customers will be asked to opt-in to receiving SMS notifications in the Booking form.

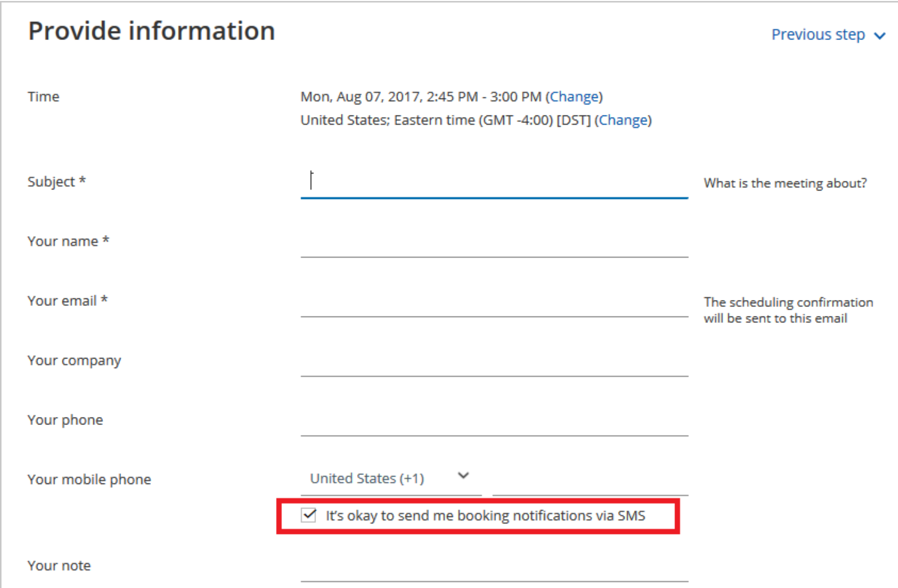


Figure 4: Customers opt-in to receiving SMSs in the Booking form

When this option is enabled and your Booking form is skipped, the checkbox will appear in the date and time selection step.

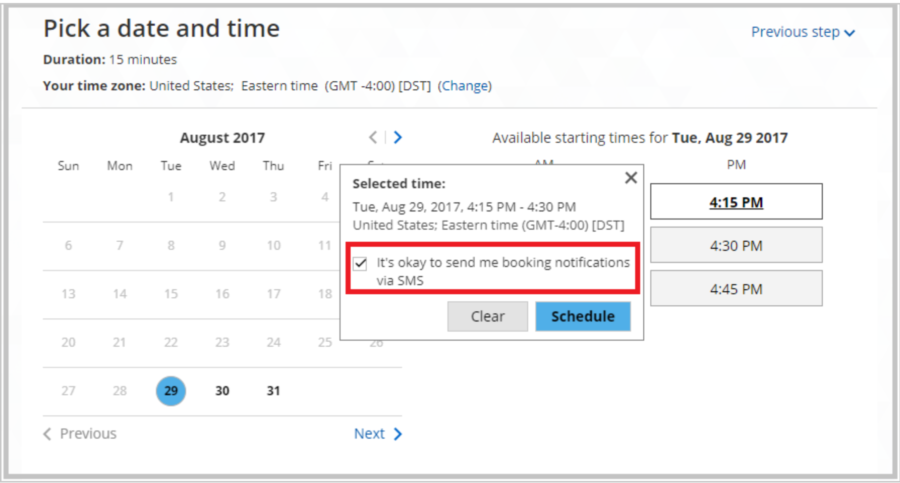


Figure 4: Opt-in to receive booking notifications via SMS

Creating and editing Custom fields

Last Modified on Oct 12, 2022

Booking forms allow you to collect information from your Customers when they make a booking. If you want to ask for information in your Booking form that you don't see represented in the System fields, you can create your own Custom field.

In this article, you'll learn about creating and editing Custom fields.

Creating a Custom field

1. Click **Booking pages** in the bar on the left.
2. On the left, select **Booking forms editor**.
3. In the **Fields library** section on the right side of the page, click the **Add Custom field to library** button (Figure 1).

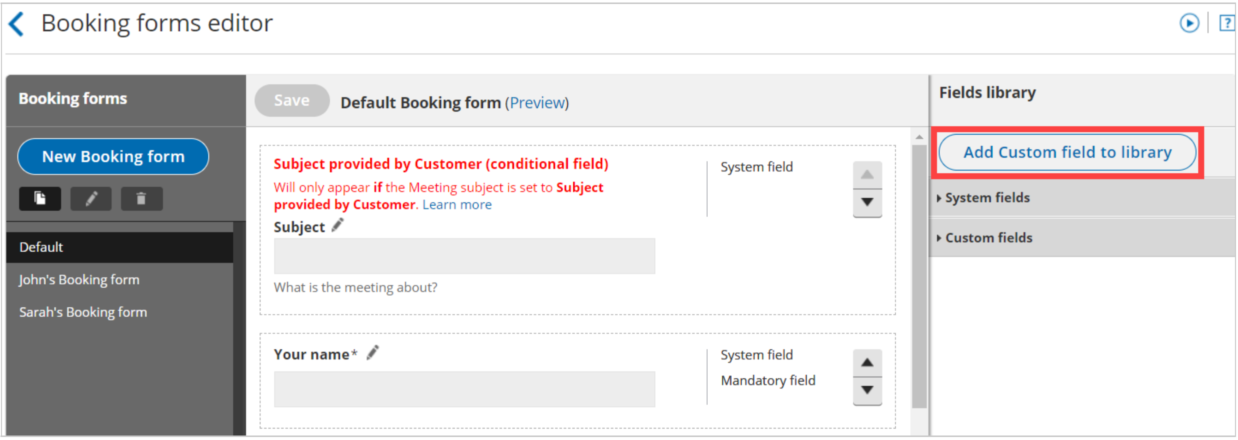


Figure 1: Add Custom field to library button

4. The **Add Custom field to library** pop-up will open (Figure 2).

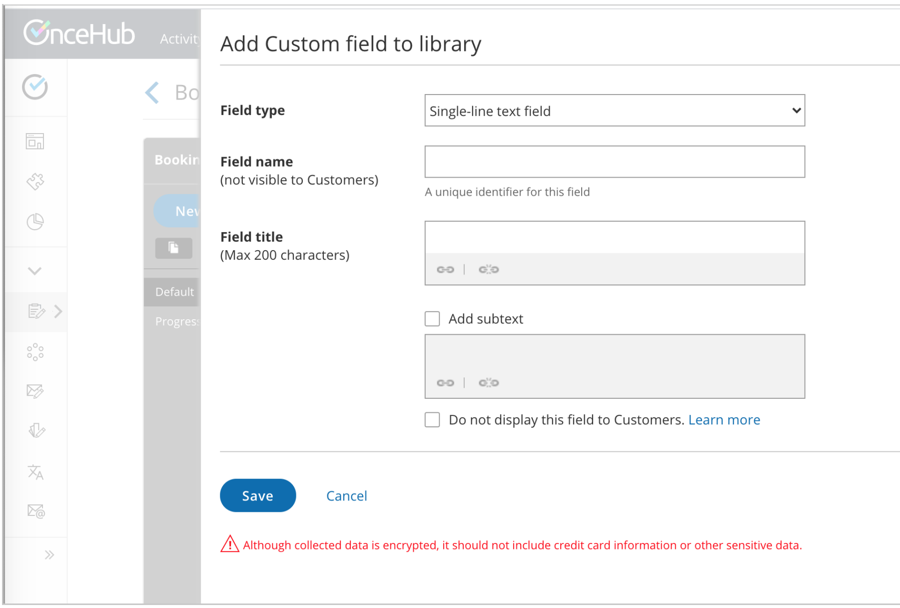


Figure 2: Adding a Custom field

5. Select a **Field type**. The following field types are available:

- **Single-line text:** A single input text box. The maximum character limit is 250.

- **Multi-line text:** An input text box used to ask Customers for additional information. The maximum character limit is 5000.
- **Dropdown:** Enables Customers to make a choice among a list of mutually exclusive options. Customers can choose only one option. A minimum of two options is required to use a **Dropdown** list.
- **Checkbox:** Enables your Customers to choose any number of options from a list. A minimum of one option is required to use the **Checkbox** Field type.
- **Attachment:** Enables you to request one attachment from your Customers. The file size limit is 5 MB and executable files are not allowed. You can also set the attachment to be secure with permission-based access. Learn more about Secure attachments

6. Enter the **Field name**. Field names are unique identifiers that OnceHub uses to track Custom fields. This allows you to use information collected from Custom fields in other areas of OnceHub, such as Reports and Custom templates. The length of the Field name input text is limited to 20 characters. Learn more about viewing information collected from your Booking form
7. Enter the **Field title**. This title is displayed to your Customers when they make a booking. The length of the Field title is limited to 200 characters.
8. Check the **Add subtext** box if you want to add subtext to your Custom field. Subtext can provide more detailed information about the Custom field to your Customers. For example, if you are asking for a phone number, you can use this space to explain how you are going to use the phone number.
9. Highlight the relevant text and click the **Link** icon (Figure 3) to link the **Field title**, subtext, or **Checkbox** option to a URL of your choice. With the link option, you can provide external information to your Customers when they make a booking online.

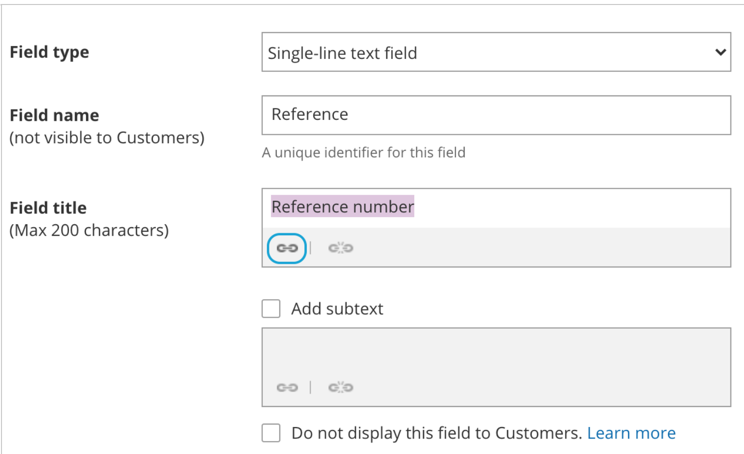


Figure 3: Link icon

10. Click **Save**.

Your new Custom field will be saved to the Fields library and can be added to your Booking form. Learn more about editing a Booking form

Note:

The following source tracking field names are reserved for source tracking, and cannot be used as Custom field names:

- utm_source: Used for identifying the traffic source.
- utm_medium: Used for identifying the delivery method.
- utm_campaign: Used for keeping track of different campaigns.
- utm_term: Used for identifying keywords.
- utm_content: Used for split testing or separating two ads that go to the same URL.

System Custom fields

System Custom fields are fields which are included in the Fields library but are not automatically included in the Booking form. These fields include data you may wish to ask for, without having to input it yourself. The System Custom fields provided include:

- **Your phone:** A single-line text field requesting their phone number
  Note: The similar **Your mobile phone** system field is included in the Booking form by default
- **Your company:** A single-line text field requesting their company
- **Your state:** A drop-down menu of all 50 states in the United States and Washington, DC.
- **Your country:** A drop-down menu of every country in the world.
- **Your location:** A drop-down menu of every US state, Canadian province and every country in the world.
- **Terms of service:** A checkbox to agree to terms of service.
- **Attachment:** Attachment field.

> **Important:**
>
> It is not recommended to ask Customers to upload attachments that contain sensitive information. Attachments are not encrypted and are not password protected. Learn more about Secure attachments

Editing Custom fields

Once you've created and saved a Custom field, you can edit it at any time. Custom fields are edited on an account level. This means that any change made to a Custom field will change the settings for that field in every Booking form that the field is included in.

To edit a Custom field that you've created, select the **Edit** icon next to the field in the Fields library (Figure 4).

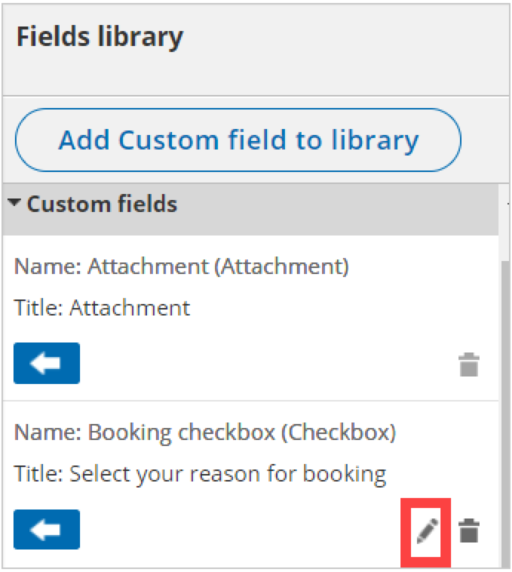


Figure 4: Edit icon next to your Custom field

In Edit mode, you have the option to:

- **Edit the Field title:** The title of the field as it will appear to Customers on the Booking form. This can be different from the **Field name**, which cannot be changed once the field is created.
- **Add subtext:** This is where you can write a description of the field, or explain why you're asking for the information.

- **Change field data you entered:** For example, let's say you created a **Checkbox** field for your Customer to select options from. You can edit, remove, or add more options as needed.

> **Note:**
>
> In a drop-down field, you cannot edit the text of an option directly. You must first delete the option and then create a new one.

Secure attachments

Last Modified on Oct 12, 2022

You can add an **Attachment** field to your Booking form. This allows you to request one attachment from your Customers. The file size limit is 5 MB and executable files are not allowed. Attachments are secured with permission-based access.

In this article, you'll learn about Secure attachments.

How are attachments secured?

All OnceHub attachment fields are automatically secured with permission-based access throughout the entire booking lifecycle. You must sign into your account in order to download an attachment.

Only the Booking page Owner and Editors can download the attachments provided by your Customers at the time of the booking. Any other OnceHub User or third party will not be able to download the attachment, and the Customer who provided the attachment will not be able to view it after submission.

Important:

It is not recommended to ask Customers to upload attachments that contain sensitive information. Attachments are not encrypted or password protected.

Accessing Secure attachments

Only the Booking page Owner or Editor can access and download the attachment. You can access Secure attachments in the Activity stream in the **Details** pane for the activity, or directly from the User email notification.

If you access the Secure attachment directly from User notifications, you will be required to login to your OnceHub account before you can download the attachment. Once logged in, the download will start automatically.

Conditional fields

Last Modified on Oct 12, 2022

Conditional fields are fields that can be included in your Booking form which are only visible if the Customer is requested to provide this information. Whether a Customer is requested to provide this information is based on settings on your Booking page or Event type.

The Booking form includes two Conditional fields: **Meeting subject** and **Location**.

Meeting subject

If you are using Booking pages without Event types, you can choose if you want the **Meeting subject** to be set by the Owner (you) or the Customer. If you choose for the Customer to provide the meeting subject, the Customer will be required to provide a meeting subject in order to complete the booking process.

> **Note:**
>
> If your Booking page is linked to an Event type, the **Meeting subject** is set by default to the Event type name and cannot be changed.

To allow the Customer to provide the meeting subject, go to **Booking pages** in the bar on the left → select the relevant Booking page → Booking form and redirect section. Then, select **Meeting subject will be provided by the Customer** (Figure 1), and click **Save**.

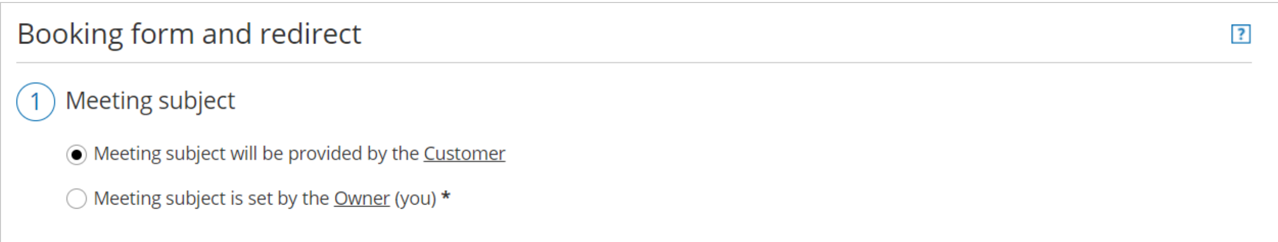


Figure 1: Meeting subject will be provided by the Customer

Location

You can customize the location of your meeting in the **Conferencing / Location** section of your Booking page (Figure 2).

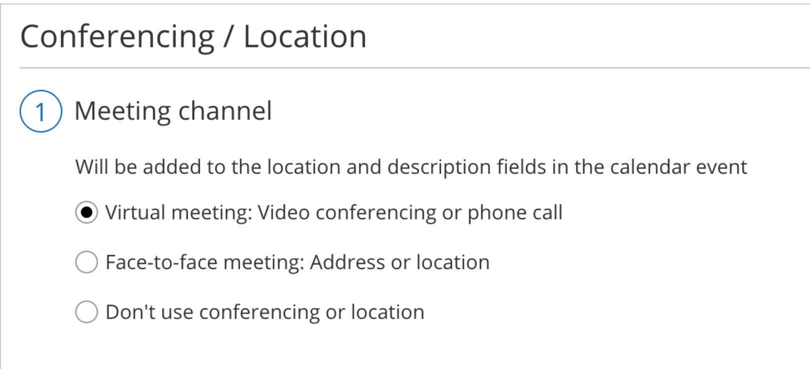


Figure 2: Booking page Conferencing / Location section

First, select the type of location: virtual meeting or face-to-face. If you choose a virtual meeting or face-to-face location, you can either provide the location yourself or specify that the Customer will provide a location when making a booking.

- If you choose for the Customer to provide the location information, the Customer will be required to provide the location information to complete the booking process.

- If you choose to not use a meeting channel or to provide one yourself, the **Location** field will not be visible to the Customer in the Booking form.

Hiding fields on the Booking form

Last Modified on Oct 12, 2022

When you add a Custom field to your Booking form, the field is visible by default. You can choose to hide the field, so that it will not be displayed on the Booking form.

In this article, you'll learn about hiding fields on the Booking form.

Why hide fields on the Booking form?

Hiding fields is typically done to pass internal company information through the booking process, without exposing it to the Customer.

For example, you might have an ID for a particular marketing source that you need to track with the booking information. The ID is internal and Customers should not see it when they book. With hidden fields, you can include the ID in the URL parameters and pass it to a third party CRM integration, add it to a calendar event, or include it in User notifications.

Customers are not able to input a value for hidden fields, and hidden fields cannot be made into mandatory fields. To use a hidden field, you should provide a value with URL parameters.

Hidden fields should not be used to pass sensitive information because the data is still visible and editable in the Booking page URL.

Important:

Data from hidden fields will be added to the default calendar event in the User's connected calendar. If the Customer is included as a guest on the calendar event they will see the hidden field data in the event details.

To prevent this you can remove the Customer from the calendar event or you can create a custom event template.

Creating a hidden Custom field

1. Go to **Booking pages** in the bar on the left.
2. On the left, select **Booking forms editor**.
3. In the **Fields library** section on the right of the page, click the **Add Custom field to library** button.
4. Select **Single line text field** as the **Field type** (Figure 1).

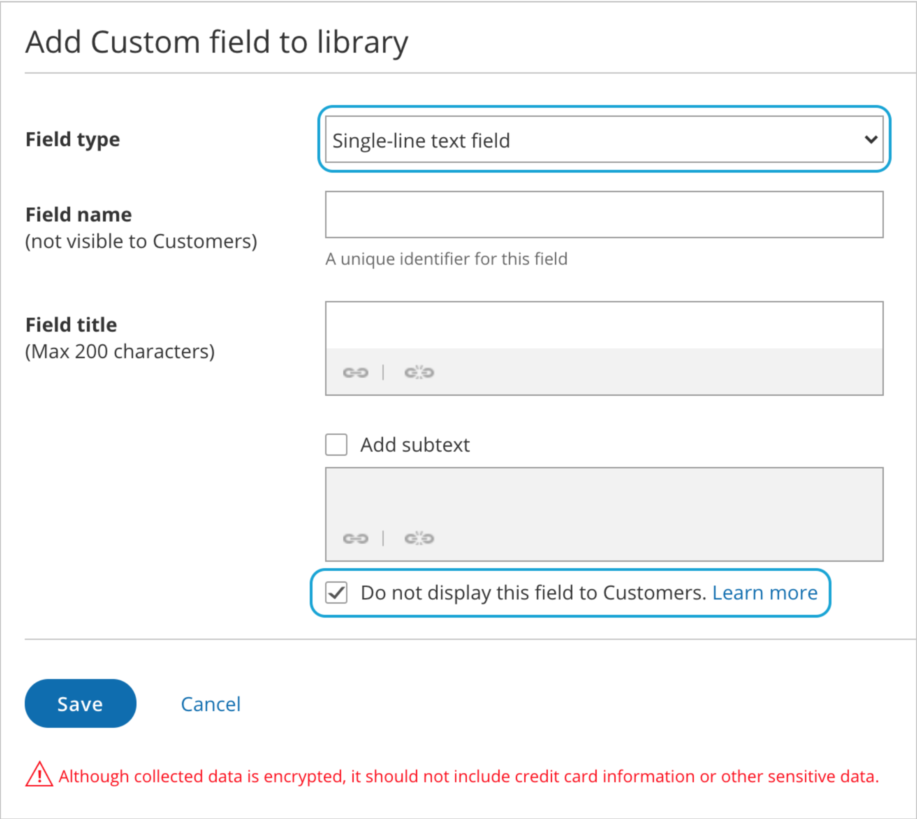


Figure 1: Creating a hidden Custom field

5. At the bottom of the Field editor, check the **Do not display this field to Customers** box.
6. Click **Save**.

To use a hidden Custom field, add it to your booking form.

Note:

Hidden fields do not show in the Booking form previews.

Hidden field example

You may want to pass a marketing campaign ID in the URL and pass it to a Custom field in your CRM. To do this, you would follow these steps:

1. Create a hidden Custom field for the marketing campaign ID and add it to your Booking form.
2. In the CRM integration setup, map the hidden OnceHub field to the Custom field in your CRM.
3. In the marketing campaign add the link to your Booking page with the marketing campaign ID in the URL. For example, go.oncehub.com/example?marketing-campaign-ID=1234

When a booking is made using this link, the marketing campaign ID (1234) will be mapped to the Customer record in your CRM.

Note:

If you are using UTM codes, you can enable source tracking to pass UTM tags that you have added to your personalized links. The following five source tracking field names are reserved for source tracking, and cannot be used as Custom field names:

- utm_source = used for identifying the traffic source
- utm_medium = used for identifying the delivery method
- utm_campaign = used for keeping track of different campaigns
- utm_term = used for identifying keywords
- utm_content = used for split testing or separating two ads that go to the same URL

Should I use a Default or Custom template?

Last Modified on Jun 5, 2023

When you send communications to Customers or Users, you can use a Default template or any Custom template that has been created in your account.

In this article, you'll learn about the differences between Default templates and Custom templates.

Default notification templates

Default notification templates are maintained by OnceHub and change dynamically depending on your settings. Default notification templates include all possible fields that might be required. When the Default template is used for a booking, it automatically uses only the relevant fields for that specific scenario.

For example, the OnceHub default email templates have a field for the meeting location. If you do not specify a meeting location in your **Conferencing / Location** section, this field will be automatically omitted and there will be no mention of location in your notification emails.

Benefits of Default notification templates:

- **Standardized text:** The email and SMS text has been written to perfectly reflect the Booking scenario. You don't have to worry about forgetting to include important information in your notifications.
- **Standardized email formatting:** The formatting is clear and easy to read. The emails follow HTML best practices.
- **No branding:** No OnceHub or other branding is used.

Custom notification templates

Custom notification templates are created by you or another User in your account. You can use Custom templates to completely customize the content and appearance of any OnceHub notification to your Customers and Users.

The template editor is flexible and can be used by beginners and advanced Users. You can edit templates with the WYSIWYG editor or edit the HTML directly.

Custom notification templates allow you to:

- Customize text in emails and SMS notifications.
- Upload your logo or an image to the template.
- Change the template text color.
- Add additional links to email or SMS notifications.
- Translate templates into any language. When Customer notifications based on Custom templates are sent, dynamic fields such as time zone, country, and location are shown in the locale (language) selected on the Booking page.
- Send concatenated SMS or long SMS messages.

> **Important:**
>
> When you use a Custom template, your notification will only include the exact fields you've used in the

template. The template will not dynamically adjust in the way that Default templates do. This means that if you alter your account setup configuration, you'll need to manually update your Custom template to reflect the changes.

For example, let’s say you were working without specifying a meeting location and then decide that you want to add one. Meeting location information will have to be manually added by you to your Custom templates.

Learn more about creating Custom email or SMS templates

How to create a Custom email or SMS template

Last Modified on Jun 5, 2023

You can use the Notification templates editor to customize the email and SMS notifications that are sent to Customers and Users.

In this article, you'll learn how to create Custom templates for email and SMS notifications.

Accessing the Notification templates editor

Custom templates are created in the Notification templates editor. To access the editor, go to **Booking pages** in the bar on the left. Select the **Notification templates editor** on the left.

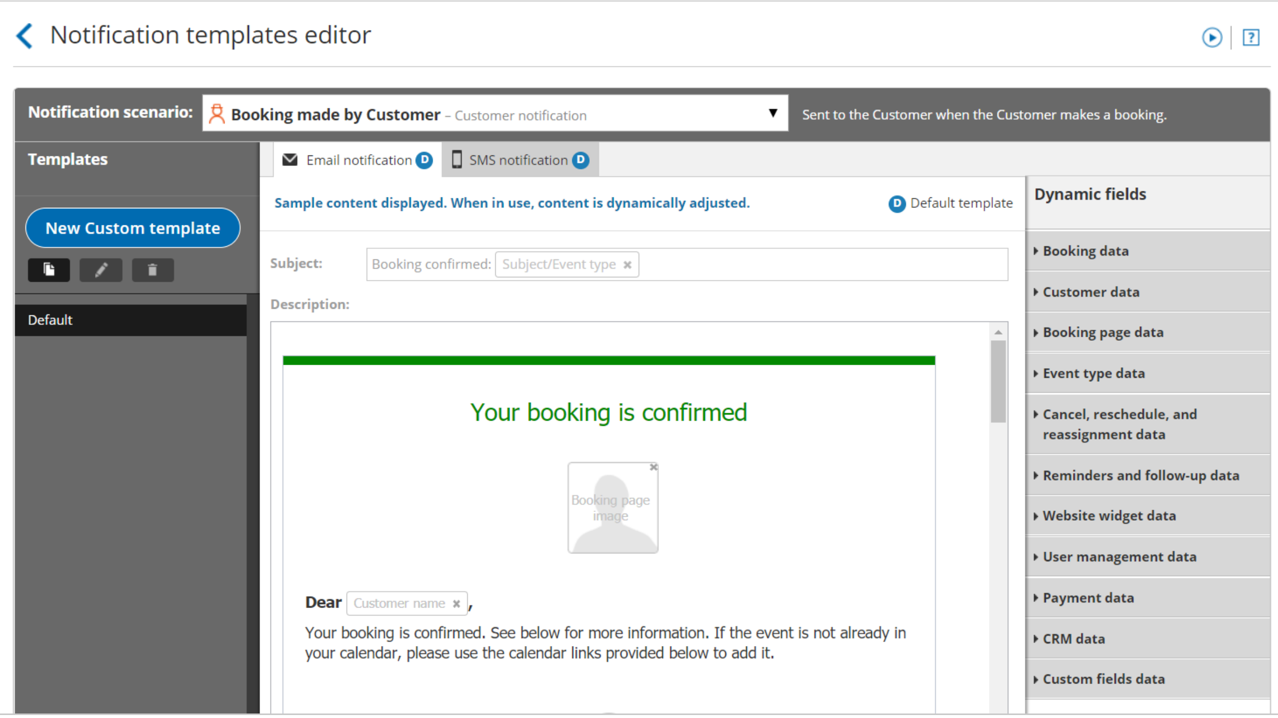


Figure 1: Notification templates editor

Creating a notification template

There are three ways to create a customized notification template. You can create a new template based on the Default template, copy an existing template you previously created, or create a blank template.

Creating a new template based on the Default template

If you like the Default template and want to make small changes to it, you can create a template based on the Default template and then customize it according to your needs.

1. Select the **Notification scenario** that you want to work on from the drop-down menu (Figure 2). Learn more about Notification scenarios

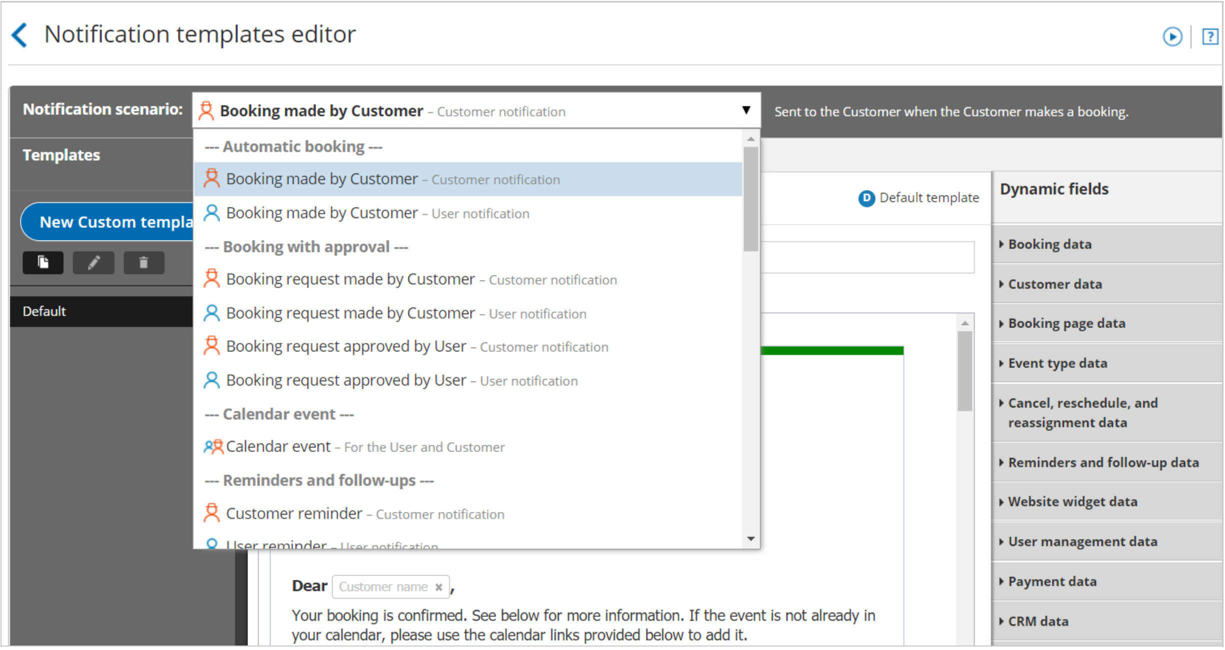


Figure 2: Notification scenarios drop-down menu

2. Click the **New Custom template** button in the left pane (Figure 3).

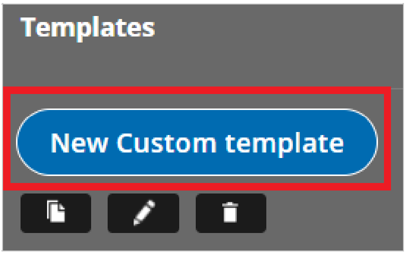


Figure 3: Click the New Custom template button

3. In the **New Custom template** pop-up, enter a name for your template. This name can be changed later if required.
4. In the **Template content** section, select **Based on default template** (Figure 4).

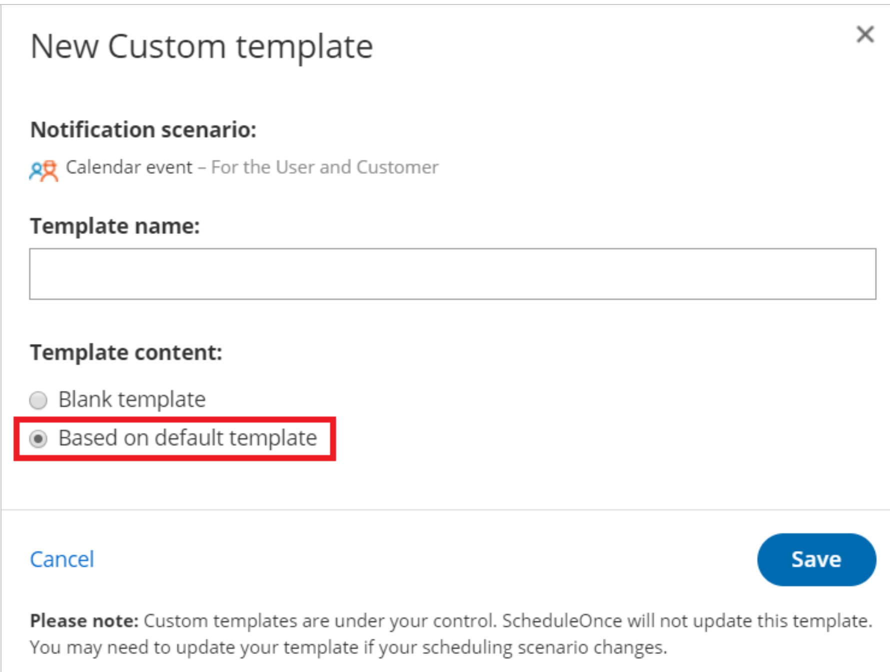


Figure 4: New Custom template pop-up

5. Click **Save**.

Copying an existing template

If you like a template that you've already created in the Notification templates editor, you can copy it and make changes to it, or use it for a different Notification scenario.

1. Select the template you want to copy from the **Templates** list.
2. Click the **Copy** icon (Figure 5).

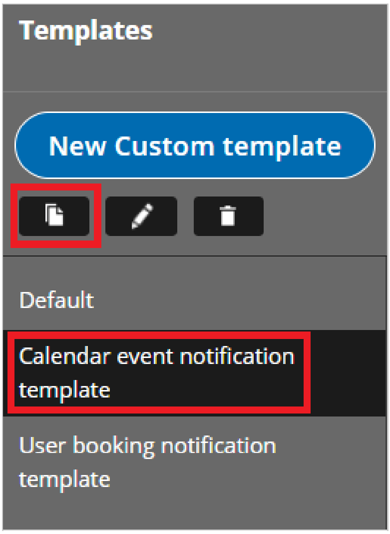


Figure 5: Copy an existing template

3. In the **Copy template** pop-up, use the drop-down menu to select the Notification scenario you want to use the template for.

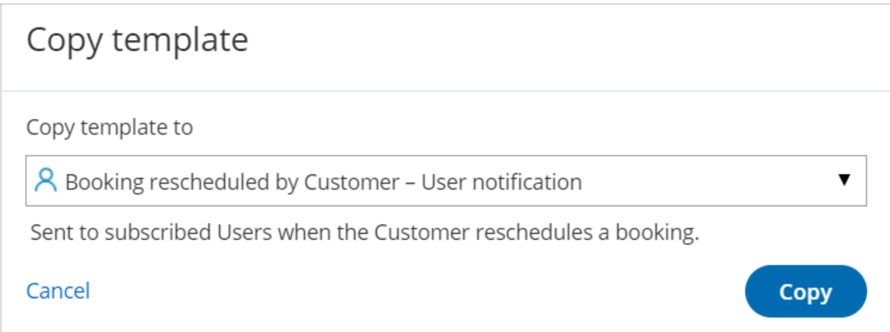


Figure 3: Copy template pop-up

4. Click **Copy**.

Creating a Blank template

If you want to create a fully customized notification template, you can create a Blank template.

1. In the **Notification scenario** drop-down menu, select the Notification scenario you want to work on. Learn more about Notification scenarios
2. Click the **New Custom template** button.
3. In the **New Custom template** pop-up, enter a name for your template (It can be changed later).
4. In the **Template content** section, select **Blank template**.

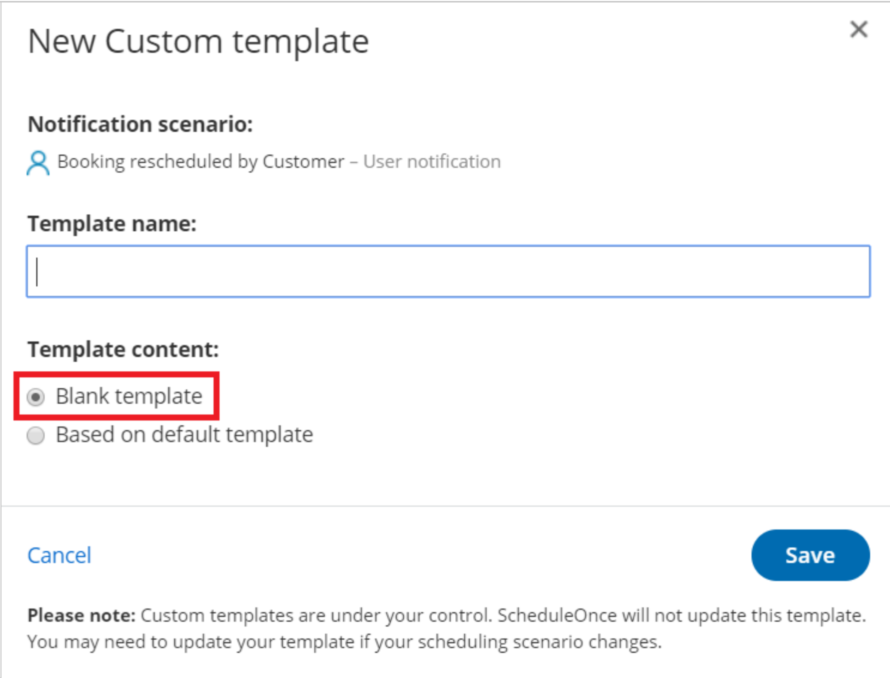


Figure 4: New Custom template pop-up

5. Click **Save**.

Editing Custom templates

The Notification templates editor has two modes: WYSIWYG (What You See Is What You Get) and HTML. The WYSIWYG mode allows you to edit template content while viewing the content in the format it will appear. The HTML mode allows you to edit the HTML code directly.

Learn more about the WYSIWG editor

Dynamic fields

You can add Dynamic fields to your Notification templates to dynamically add variable data to your emails and SMS notifications. This allows you to personalize templates for different scenarios for Users or for Customers. For example, emails and SMS can include the Customer's name and the meeting time and price if you are charging for an Event type.
Learn more about Dynamic fields

Adding a Dynamic field

1. Place the cursor in the template editor text box where you want to insert the Dynamic field (Figure 5).

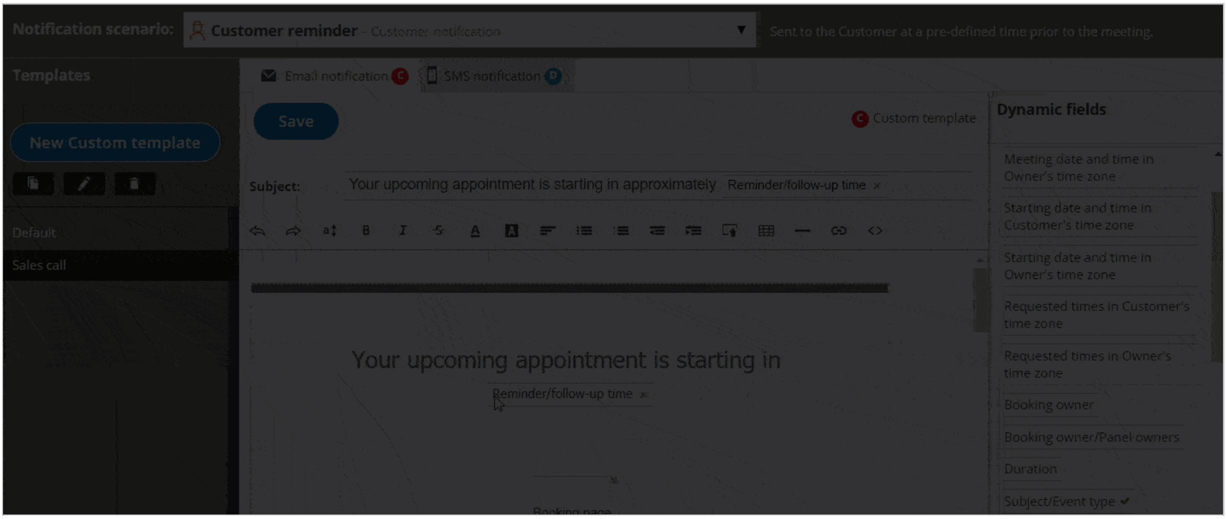


Figure 5: Place the cursor in the template editor text box

2. In the **Dynamic Fields** column on the right, click the Dynamic field you want to add (Figure 6).

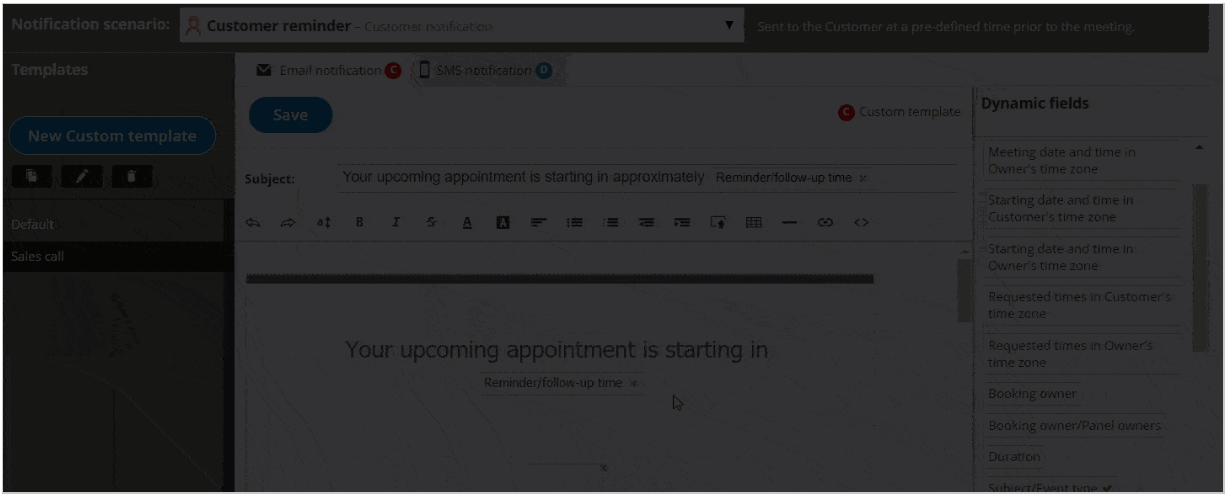


Figure 6: Add a Dynamic field

3. The chosen Dynamic field will appear in the selected location in the template.

To remove a Dynamic field, click on the **X** next to the Dynamic field you want to remove.

Note::

When you use Dynamic fields, you need to be sure that the data exists in your account.

For example, **Event type price** is one of the Dynamic fields available to you. However, if you do not enter an Event type price in the Payment/cancel and reschedule policy section, no data will be displayed for this field in your emails and SMS notifications. Learn more about Dynamic fields

Where are notification templates used?

Notification templates are used in specific Notification scenarios. You can select which Notification template is used in each scenario from the **Template** drop-down menu in the Customer notifications section and User notifications section of your Booking pages and Event types.

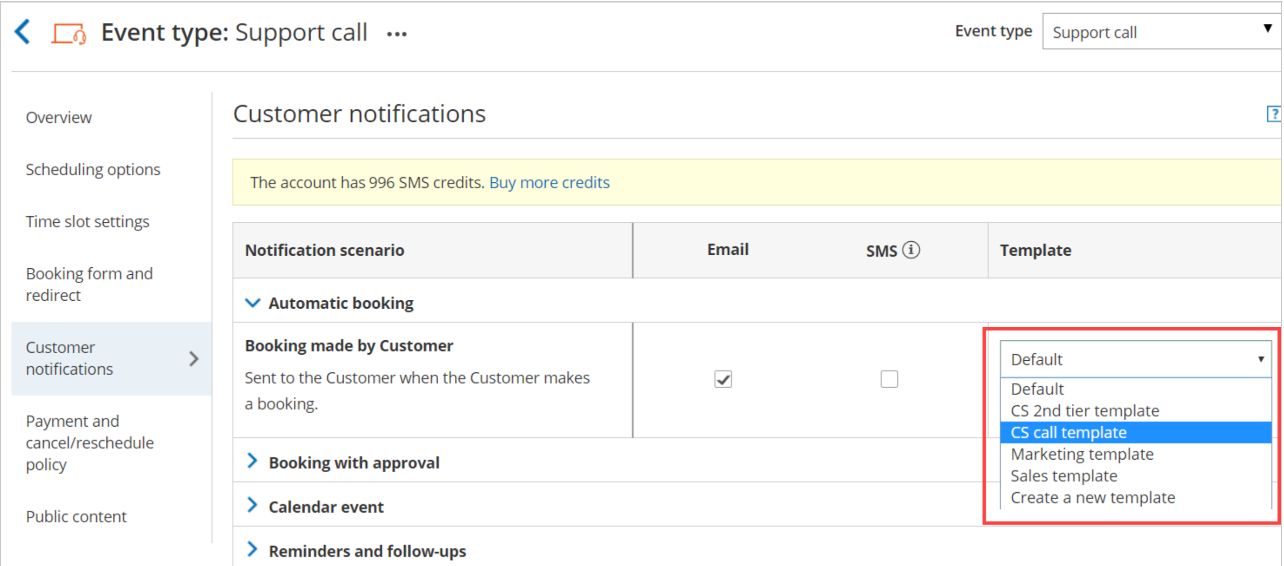


Figure 6: Template drop-down menu

Customer notifications templates

Customer notification templates are used in the Customer notifications section. To choose which notifications Customers receive, go to **Booking pages** in the bar on the left → relevant Event type→ **Customer notifications**.

> **Note:**
>
> If your Booking page is associated with an Event type, the Customer notifications section will be on the Event type.

When Customer notifications based on custom templates are sent, dynamic fields such as time zone, country, and location are shown in the locale (language) selected on the Booking page.

User notifications templates

User notification templates are used in the User notifications section. To edit which notifications Users receive, go to **Booking pages** in the bar on the left → relevant Booking page **→ User notifications** (Figure 7).

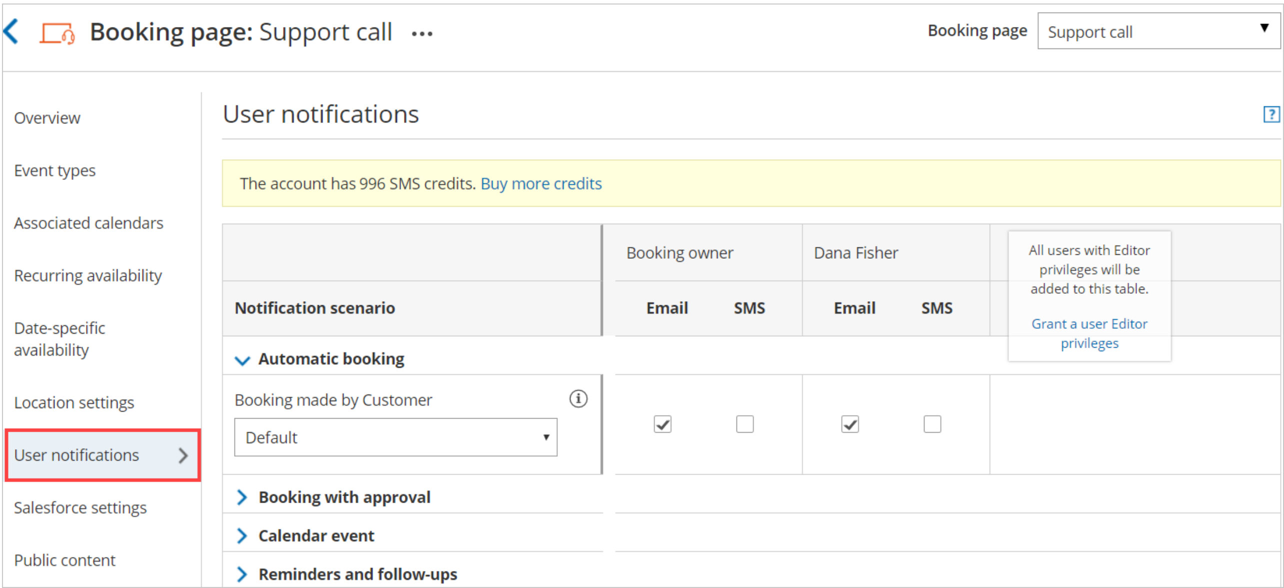


Figure 7: User notifications section

Calendar event template

You can access the Calendar event template in the User notifications section. To edit which template is used for the Calendar event, go to → relevant Booking page → **User notifications**.

Website widget inquiries template

Website widget inquiries templates are used in the Website widget setup. To edit which website widget template is used, go to the **Schedule button** in the top navigation menu **→ Publish on your website → Website widget → Widget content -→ Email**.

New User sign-up template

New user sign-up templates is used in the Add a new User page. To edit which New User sign-up template is used, go to the **Account gear menu → Users → New user button**.

Notification scenarios

Last Modified on Feb 28, 2023

Notification scenarios are booking events that trigger an email or SMS notification to be sent to Customers or subscribed Users. Some scenarios take place when you or a Customer take an action, such as a Customer making a booking. Some scenarios take place at a predefined time, such as pre-meeting reminder notifications.

In this article, you'll learn about the different OnceHub Notification scenarios.

Note:

Not all scenarios apply for every booking. For example, the scenario **Booking request made by Customer** triggers a notification only on pages that use Booking with approval mode.

While it is possible to create a template for any scenario, we recommend ensuring that the template is relevant for your scenario.

OnceHub Notification scenarios

	Description	Where the template is used
Automatic booking		
Booking made by Customer – Customer notification	Sent to the Customer when the Customer makes a booking.	Customer notifications section Found in **Booking pages** in the bar on the left → **Event type → Customer notifications**
Booking made by Customer – User notification	Sent to subscribed Users when the Customer makes a booking.	User notifications section Found in **Booking pages** in the bar on the left → **Booking page → User notifications**
Booking with approval		
Booking request made by Customer – Customer notification	Sent to the Customer when the Customer submits a booking request.	Customer notifications section Found in **Booking pages** in the bar on the left → **Event type → Customer notifications**
Booking request made by Customer – User notification	Sent to subscribed Users when the Customer submits a booking request.	User notifications section Found in **Booking pages** in the bar on the left → **Booking page → User notifications**

Booking request approved by User – Customer notification	Sent to the Customer when a User approves a booking request.	Customer notifications section Found in **Booking pages** in the bar on the left → **Event type → Customer notifications**
Booking request approved by User – User notification	Sent to subscribed Users when a User approves the Customer's booking request.	User notifications section Found in **Booking pages** in the bar on the left → **Booking page → User notifications**
Calendar event		
Calendar event – For the User and Customer	The calendar event can include any booking details and can be added to the Booking owner's calendar and Customer's calendar.	User notifications section Found in **Booking pages** in the bar on the left → **Booking page → User notifications**
Reminders and follow-ups		
First Customer reminder	Sent to the Customer at a predefined time prior to the meeting.	Customer notifications section Found in **Booking pages** in the bar on the left → **Event type → Customer notifications**
First User reminder	Sent to subscribed Users at a predefined time prior to the meeting.	User notifications section Found in **Booking pages** in the bar on the left → **Booking page → User notifications**
Second Customer reminder	Sent to the Customer at a predefined time prior to the meeting.	Customer notifications section Found in **Booking pages** in the bar on the left → **Event type → Customer notifications**
Second User reminder	Sent to subscribed Users at a predefined time prior to the meeting.	User notifications section Found in **Booking pages** in the bar on the left → **Booking page → User notifications**
Third Customer reminder	Sent to the Customer at a predefined time prior to the meeting.	Customer notifications section Found in **Booking pages** in the bar on the left → **Event type → Customer notifications**
Third User reminder	Sent to subscribed Users at a predefined time prior to the meeting.	User notifications section Found in **Booking pages** in the bar on the left → **Booking page → User notifications**

Follow-up message – Customer notification	Sent to the Customer at a predefined time after the meeting ends. Note: There is no prewritten text in the Default email or SMS template. The note you write for the Follow-up message will be the only text the customer will receive.	Customer notifications section Found in **Booking pages** in the bar on the left → **Event type → Customer notifications**
Follow-up message – User notification	Sent to subscribed Users when a follow-up message is sent to the Customer. Note: The Default template is a confirmation that an email was sent.	User notifications section Found in **Booking pages** in the bar on the left → **Booking page → User notifications**
Booking cancellation		
Booking canceled by Customer – Customer notification	Sent to the Customer when the Customer cancels a booking.	Customer notifications section Found in **Booking pages** in the bar on the left → **Event type → Customer notifications**
Booking canceled by Customer – User notification	Sent to subscribed Users when the Customer cancels a booking.	User notifications section Found in **Booking pages** in the bar on the left → **Booking page → User notifications**
Booking canceled by User – Customer notification	Sent to the Customer when a User cancels a booking.	Customer notifications section Found in **Booking pages** in the bar on the left → **Event type → Customer notifications**
Booking canceled by User – User notification	Sent to subscribed Users when a User cancels a booking.	User notifications section Found in **Booking pages** in the bar on the left → **Booking page → User notifications**
Booking reschedule		
Booking rescheduled by Customer – Customer notification	Sent to the Customer when the Customer reschedules a booking.	Customer notifications section Found in **Booking pages** in the bar on the left → **Event type → Customer notifications**
Booking rescheduled by Customer – User notification	Sent to subscribed Users when the Customer reschedules a booking.	User notifications section Found in **Booking pages** in the bar on the left → **Booking page → User notifications**

Reschedule requested by User – Customer notification	Sent to the Customer when a User requests to reschedule a booking.	Customer notifications section Found in **Booking pages** in the bar on the left → **Event type** → **Customer notifications**
Reschedule requested by User – User notification	Sent to subscribed Users when a User sends a reschedule request to the Customer.	User notifications section Found in **Booking pages** in the bar on the left → **Booking page** → **User notifications**
Booking reassignment		
Booking reassigned (previous User)	Sent to subscribed Users of the previous Booking page when a booking is reassigned from the page.	User notifications section Found in **Booking pages** in the bar on the left → **Booking page** → **User notifications**
Booking reassigned (new User)	Sent to subscribed Users of the new Booking page when a booking is reassigned to the page.	User notifications section Found in **Booking pages** in the bar on the left → **Booking page** → **User notifications**
Booking request cancellation		
Booking request canceled by Customer – Customer notification	Sent to the Customer when the Customer cancels a booking request.	Customer notifications section Found in **Booking pages** in the bar on the left → **Event type** → **Customer notifications**
Booking request canceled by Customer – User notification	Sent to subscribed Users when the Customer cancels a booking request.	User notifications section Found in **Booking pages** in the bar on the left → **Booking page** → **User notifications**
Booking request canceled by User – Customer notification	Sent to the Customer when a User cancels a booking request.	Customer notifications section Found in **Booking pages** in the bar on the left → **Event type** → **Customer notifications**
Booking request canceled by User – User notification	Sent to subscribed Users when a User cancels a booking request.	User notifications section Found in **Booking pages** in the bar on the left → **Booking page** → **User notifications**
Booking request resubmission		

Booking request resubmitted by Customer – Customer notification	Sent to the Customer when the Customer resubmits a booking request.	Customer notifications section Found in **Booking pages** in the bar on the left → **Event type → Customer notifications**
Booking request resubmitted by Customer – User notification	Sent to subscribed Users when the customer resubmits a booking request.	User notifications section Found in **Booking pages** in the bar on the left → **Booking page → User notifications**
Booking request resubmission requested by User – Customer notification	Sent to the Customer when a User requests a resubmission of the booking request.	Customer notifications section Found in **Booking pages** in the bar on the left → **Event type → Customer notifications**
Booking request resubmission requested by User – User notification	Sent to subscribed Users when a User requests the Customer to resubmit a booking request.	User notifications section Found in **Booking pages** in the bar on the left → **Booking page → User notifications**
User management		
New user sign-up email – User notification	Sent to a new User to invite them to join your OnceHub account.	Adding Users Click on the **Account gear menu** and select **Users → Add User** button **→ Invitation email template**

Note:

In the Notification templates editor you can create Custom templates for any scenarios of your choosing.

The WYSIWYG mode of the Notification templates editor

Last Modified on Jun 5, 2023

The Notification templates editor is used to customize the content and appearance of emails and SMS notifications sent to your Customers and Users. The template editor has two modes, WYSIWYG (What You See Is What You Get) and HTML.

The WYSIWYG mode allows you to edit template content while viewing the content in the format it will appear. The HTML mode allows you to edit the HTML code directly and is only recommended for advanced Users.

Note:

OnceHub emails are generated via HTML. When you work with email templates, it is important to be aware of HTML email best practices. Following these best practices will help ensure that your emails are delivered to your Users and Customers and will look the way you want them to.

In this article, you'll learn about the WYSIWYG mode of the Notification templates editor.

Edit functions in the Notification templates editor

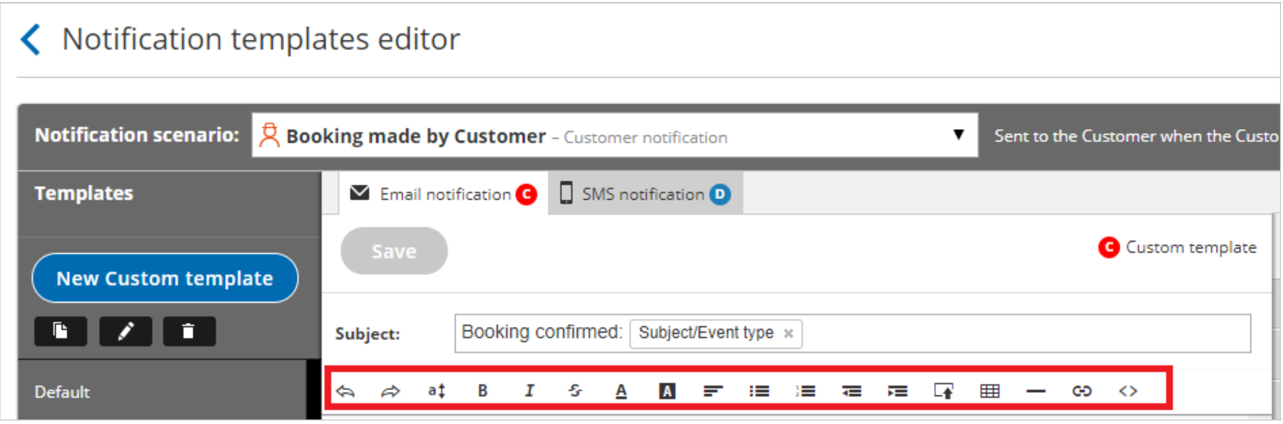


Figure 1: Edit functions in the Notification templates editor

The following functions are available in the template editor and are controlled via the buttons at the top. These are the buttons as they appear from left to right:

- **Undo**
- **Redo**
- **Font size:** Allows you to change the size of the text. You can use this setting to create headings.
- **Bold**
- **Italic**
- **Strikethrough:** Allows you display text as crossed out. Click the button again to undo the function.
- **Font color:** Allows you to change the color of text in the template.
- **Background color:** Allows you to change the color of the text background.
- **Alignment:** Align text to the left, center, right, or justify it. By default, all text is aligned to the left.
- **Bulleted list**
- **Numbered list**
- **Decrease indent**
- **Increase indent**

- **Insert image:** Allows you to upload an image from your Computer. The maximum image size supported is 200kb.
- **Insert table:** Allows you insert a table with any number of rows or columns. You can also add and delete rows and columns as well as define header rows.
- **Insert line:** Allows you insert a horizontal line.
- **Insert link**: Insert and remove links from text and images.
- **HTML:** Allows you to edit the HTML code of the template directly.

Dynamic fields

Last Modified on Jun 5, 2023

You can add Dynamic fields to Notification templates to populate emails and SMS notifications with customized data.

In this article, you'll learn about Dynamic fields.

How do Dynamic fields work?

Dynamic fields allow you to create email and SMS notifications that contain specific information related to your bookings and are personalized for the Customer and User.

For example, let's say you want to start a confirmation email with a personalized greeting. To do this, you'll insert the dynamic field called **Customer name** into the template. Once you do this, every confirmation email will start with "Dear <Customer name>". OnceHub will insert the name the Customer provided in the Booking form where you defined that the field "Customer name" should be.

Where do Dynamic fields get data from?

OnceHub provides over 80 Dynamic fields to choose from. Dynamic fields contain information taken from:

- Booking details.
- Customer information from the Booking form.
- Booking page details.
- Event type details.
- Canceling and rescheduling data.
- Reassignment details.
- Reminders and Follow-up settings.
- Website widget data.
- User details.
- CRM data.
- Custom fields created in the Booking forms editor.
- Payment data.

Note :

Payment data is specified per transaction rather than per activity. Therefore, one activity may have a number of transactions. For example, a single booking may have a rescheduling fee and a refund.

Adding Dynamic fields to your notification template

1. Create a Custom template.
2. Place the cursor in the template editor text box where you want to insert the Dynamic field (Figure 1).

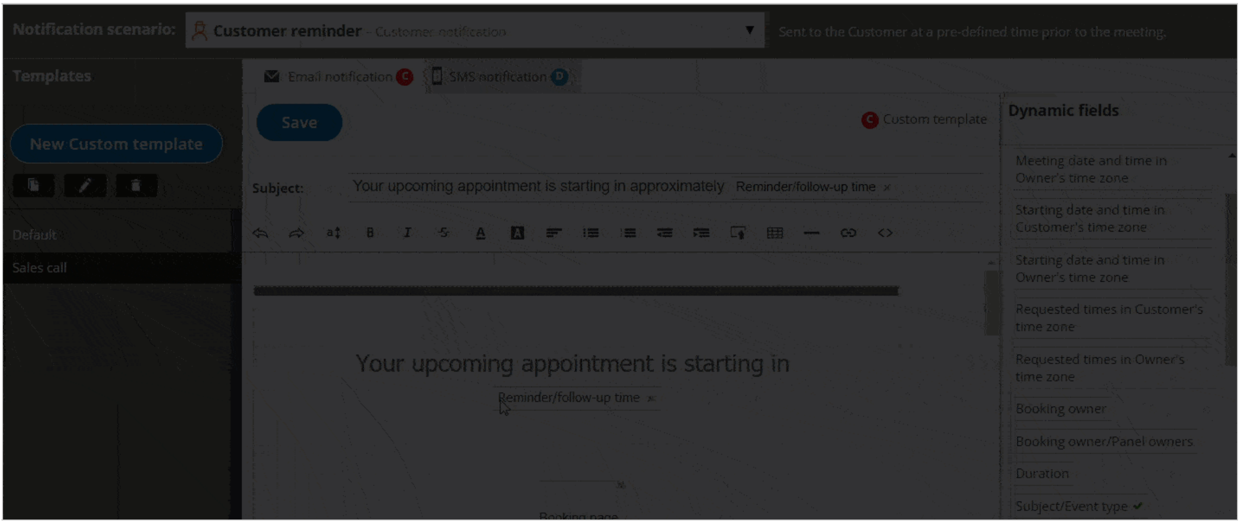


Figure 5: Place the cursor in the template editor text box

3. In the **Dynamic Fields** column on the right, click the Dynamic field you want to add (Figure 2).

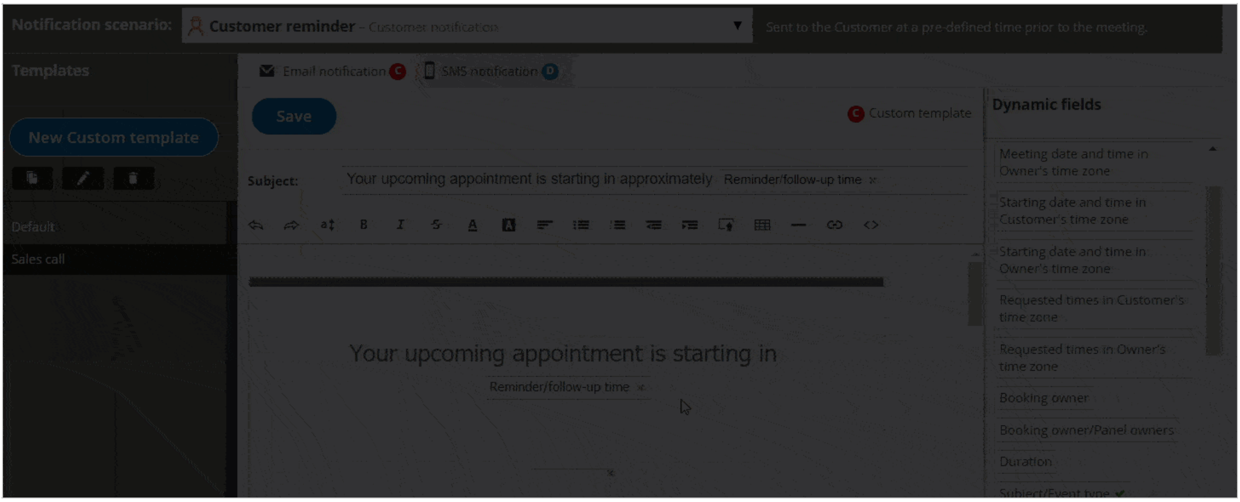


Figure 2: Add a Dynamic field

4. The chosen Dynamic field will appear in the selected location in the template.

To remove a Dynamic field, click on the **X** next to the Dynamic field you want to remove.

Note:

When you use Dynamic fields, you need to be sure that the data exists in your scheduling scenario.

For example, **Event type price** is one of the Dynamic fields available to you. However, if you do not enter an Event type price in the Payment/cancel and reschedule policy section, no data will be displayed for this field in your emails and SMS notifications.

Dynamic fields and localization

When Customer notifications based on Custom templates are sent, Dynamic fields such as time zone, country and location are shown in the locale (language) selected on the Booking page. The date/time format also follows the selected locale. In all other cases, Dynamic fields are shown in English, and the date/time format follows User profile settings. Learn more about localization

	Default templates	Custom templates

User notifications by email and SMS	OnceHub Dynamic fields are shown in English. Date/time format follows User profile settings.	OnceHub Dynamic fields are shown in English. Date/time format follows User profile settings.
Customer notifications by email and SMS, and the Calendar event	OnceHub Dynamic fields are shown in English. Date/time format follows User profile settings.	OnceHub dynamic fields such as time zone, country, and location are shown in the locale (language) selected on the Booking page. Date/time format follows locale settings.

Best practices for creating HTML templates

Last Modified on Oct 12, 2022

The Notification templates editor is used to customize the content and look and feel of the emails to your Customers and Users. The template editor has two modes, WYSIWYG (What You See Is What You Get) and HTML. The HTML mode allows you to edit the HTML code directly and is only recommended for advanced Users.

In this article, you'll learn about the best practices for creating HTML templates.

You do not need an assigned product license to access the Notification templates editor, though you do need to be an Administrator. Learn more

To access the Notification templates editor, go in the top navigation menu to **Booking pages** in the bar on the left → Select the **Notification templates editor** on the left.

Accessing HTML mode

To edit your Notification template in HTML mode, open the Notification templates editor and click the **HTML** button in the template editor toolbar (Figure 1).

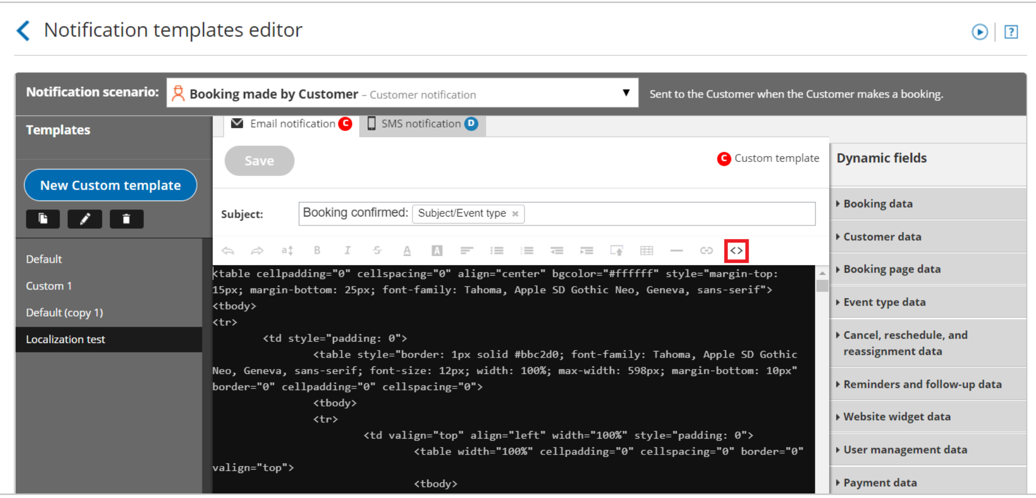


Figure 1: Accessing HTML mode

Best practices for creating HTML templates

Whether you're making a few changes to a Default template or coding your own template from scratch, it's good to know the best practices for creating HTML emails. Following these HTML best practices will ensure that the formatting of your emails is consistent in different email clients, help keep your emails out of Spam folders, and make your emails more likely to be opened and read.

Maintain uniform format in different email clients

- Keep the width of the email under 600 pixels. This width is supported by all email clients. Not every email client supports widths larger than this.
- Don't use images in PNG format. Some email clients don't support it.
- Write all text in a table. Tables keep alignment consistent across different email clients. Most emails look best using a one column table that has a row for each paragraph. Be sure to make the table borders invisible if you don't want them to show.

Note:

Custom email templates created via the "copy" function in the Notification templates editor include a table with invisible borders. You can use this table and delete the text as necessary. Learn how to create a Custom template

Keep your emails out of Spam folders

- **Avoid writing phrases in ALL CAPS:** Writing in all caps is seen as shouting and is a potential Spam trigger.
- **Keep your text simple:** The majority of your email should be written in black text with a normal-sized font. Large fonts and colors should be used sparingly. Text written in large fonts and in bright colors is a potential Spam trigger.
- **Avoid using lots of images:** This is a potential Spam trigger, and it also takes away from your message.

Increase the chances of your emails being opened and read

- **Keep subject lines clear and to the point:** Email subjects should give a good preview of what your email message is about. If recipients realize the message is important, they're more likely to open it.
- **Use bullets or lists for important points:** Bullets and lists are easier to read and skim. For example, the OnceHub Default templates use very few full sentences. The majority of the information is in organized lists.
- **Keep the message short:** Some of your Users and Customers receive hundreds of email messages a day. They don't have time to read extra stuff. They simply want to get the information they need and to move on.
- **Avoid marketing-speak:** Messages that are to-the-point are better received. Anyone receiving a booking-related email from you is already engaged and does not need to be inundated with marketing messages.
- **Have a clear call-to-action:** It should be clear what, if any, next steps the User or Customer needs to take. For example, the Default template used for the **Reschedule requested by User** emails includes a button that the Customer can click to reschedule the meeting.

Best practices for advanced Users working in HTML mode

- Use standards-compliant HTML and avoid shortcuts.
- Use clean, inline CSS and avoid shorthand CSS.
- Don't use Flash or Javascript or other dynamic scripts. Most email clients turn content created with these languages off by default.
- Use alternative text in images. Many email clients turn images off by default. The alternative text tells the receiver what the image contains.

How to test a Custom notification template

Last Modified on Oct 12, 2022

You can test your Custom templates by creating a test booking and filling out a Booking form as if you were a Customer. You can perform several of these test bookings to test every template you have created in every relevant scenario.

In this article, you'll learn how to test a Custom notification template.

Testing the Custom notification template

1. In the Booking form section of your Event type, use from the **Booking form** drop-down menu to select a Booking form (Figure 1).

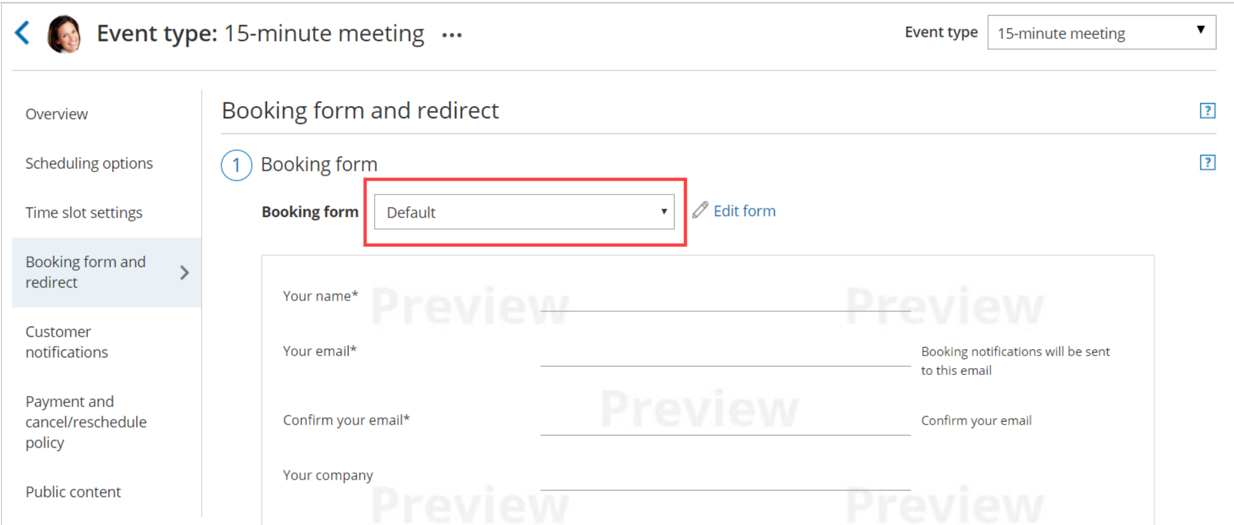


Figure 1: Selecting a Booking form template

2. In the Customer notification section of your Event type, select a template for each Notification scenario you want to send notifications for (Figure 2).

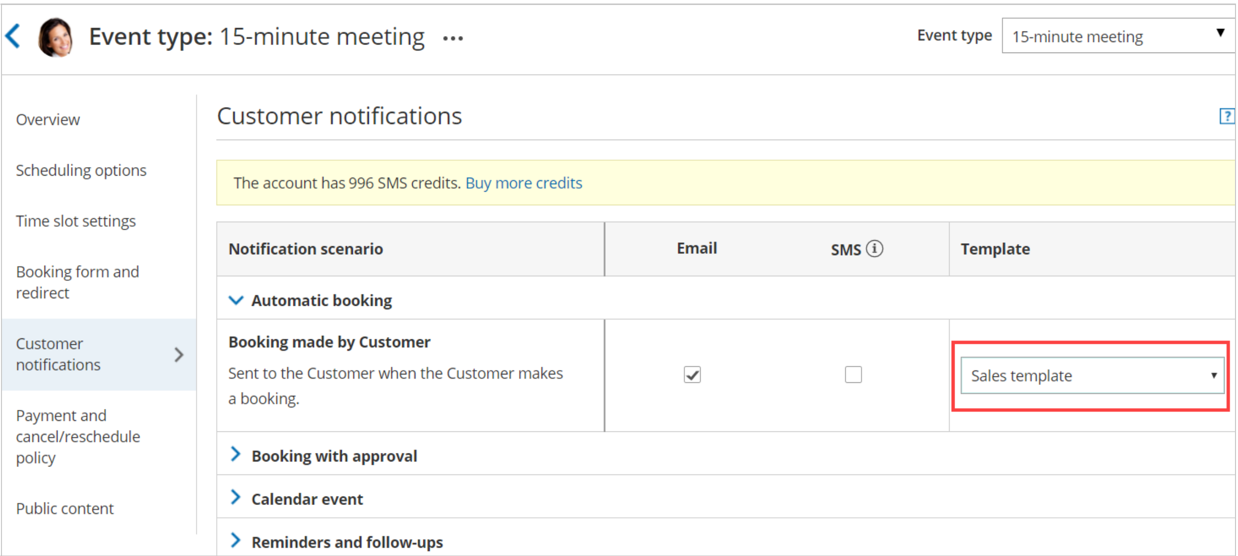


Figure 2: Choosing a Custom notification template for each Notification scenario

3. In the User notifications section of your Booking page, select a template for each Notification scenario you want to send notifications for (Figure 3).

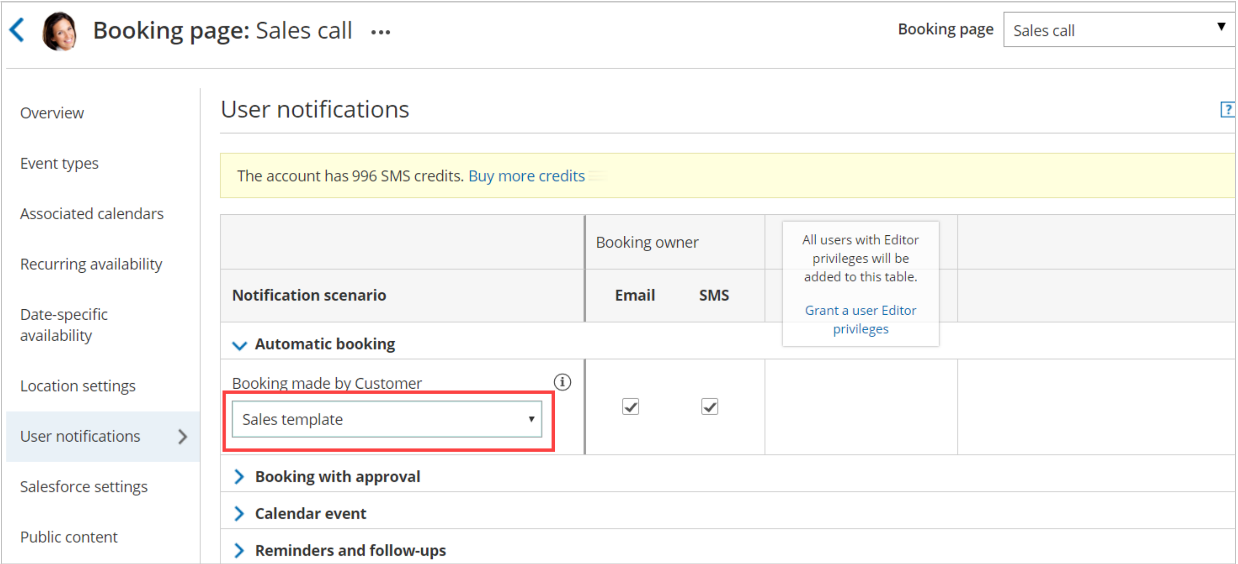


Figure 3: Choosing a Custom notification template for each Notification scenario

> **Note:**
>
> If you want to receive User SMS notifications, you'll need to enter a phone number in your Profile's Personal details section.

4. In the Booking page Overview section of your Booking page, click on the public link in the **Share & Publish** section.

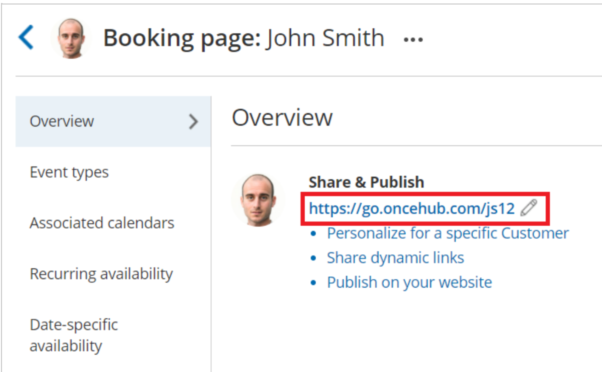


Figure 4: Booking page public link

5. Schedule a meeting and fill out the Booking form that you created as if you were a Customer.
6. Click **Done**.
7. You can now check that you received a confirmation email and SMS.
   If you're using Booking with approval mode, you can click **Approve the booking request** in your User email notification. Learn more about scheduling booking requests
   You can also check that the calendar event was added to your calendar. Learn more about calendar events
8. Finally, you can choose to cancel or reschedule the booking, or let the booking run its course and test the reminder and follow-up messages.

Testing checklist

During the testing, you should check the following:

- The text is written the way you want.
- The correct Dynamic fields were chosen.
- The spacing/formatting is correct.

- That you are sending emails and SMS notifications for the required booking notifications.

Understanding localization and Customer interface text

Last Modified on Oct 15, 2024

You to localize the Customer scheduling experience by applying different languages, date/time formats, and other language-specific and culture-specific settings to your Booking pages. You can create a localized experience for your Customers using one of our seven out-of-the-box System locales or using a Custom locale.

You do not need an assigned product license to update a locale's settings in the Localization editor, nor to update a Booking page's locale. Learn more

Locales are centrally managed in our Localization editor. To access the Localization editor, go to **Booking pages** in the bar on the left. Select **Localization editor** on the left.

Locales

A locale is a collection of settings that defines the language, date/time format, and other text elements that are seen by Customers. A locale defines every line of text on your Booking pages, including instructions, tooltips, buttons, and more.

Each locale sets the following aspects of the Customer experience:

- Language and wording of the Customer interface text.
- Dynamic values: Time zone names, days of the week, month names, and countries.
- Date format.
- Time format.
- Week start day.

You can use the System locales provided or create Custom locales, which allow you to edit Customer interface text.

Learn more about the steps to localize the Customer experience

System locales

There are seven out-of-the-box System locales that you can apply to your Booking pages.

- English (US)
- English (UK)
- French
- German
- Spanish
- Portuguese (Brazil)
- Dutch

Learn more about System and Custom locales

Custom locales

To edit Customer interface text on your Booking pages such as titles, buttons, and messages, you'll need to create a Custom locale. Customer interface text is centrally managed in our Localization editor. Any changes are automatically implemented on the relevant Booking pages. You can apply the same text to all Booking pages, or use different text for Booking pages serving different Customer segments.

Editing Customer interface text ensures that the text on your page is 100% accurate for your specific scheduling scenario. It also allows you to maintain your tone, voice, lexicon, and overall branding throughout the scheduling process.

Learn more about editing Customer interface text

Date and time format

To change the local date/time standards, you can select the appropriate date pattern, time format (24h or AM/PM) and week start day for your target audience. Your Booking pages will show times according to the settings of the locale selected for that page on your Booking page Overview section or Master page Overview section.

Applying a locale

Locales can be selected for Booking pages and Master pages in their respective Overview sections. You can apply the same locale to all pages, or use different locales for pages serving different Customer segments. Any changes to the locale are automatically implemented on relevant pages.

Learn more about applying a locale

The Localization editor

Last Modified on Oct 15, 2024

The Localization editor allows you to localize the customer scheduling experience by applying different languages and date and time formats to your Booking pages.

In this article, you'll learn about the Localization editor.

Requirements

To access the Localization editor, you must be a OnceHub Administrator. However, you do not need an assigned product license. Learn more

Location of the Localization editor

To access the Localization editor, go to **Booking pages** in the bar on the left. Select **Localization editor** on the left (Figure 1).

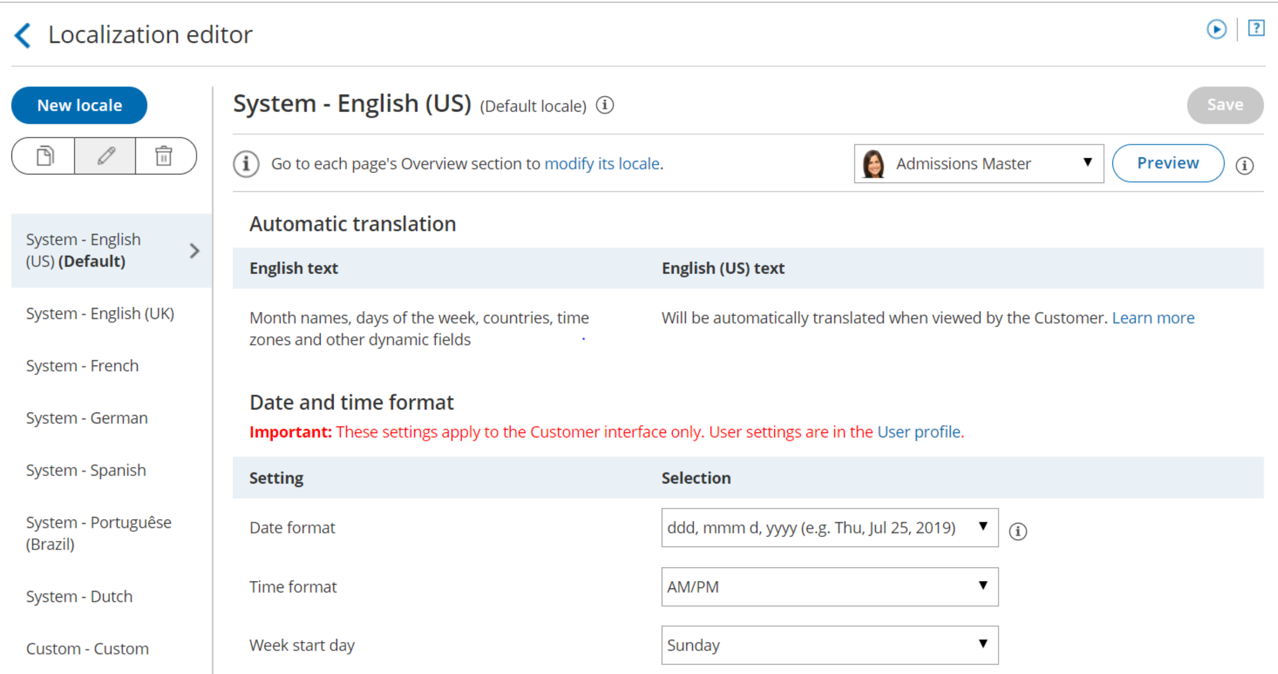


Figure 1: The Localization editor

Locales list

All the locales of the account are managed in the left column. A locale defines the language and the date/time formats that are seen by Customers. Each locale is a collection of settings that define the following aspects of the customer experience:

- Language and wording of the Customer interface text.
- Dynamic values, including time zone names, days of the week, month names, and countries.
- Date format
- Time format
- Week start day

Locales are centrally managed in the **Localization editor**. To view the properties of a locale, click on it in the locales list.

Duplicate locale

You can duplicate any locale. To duplicate a locale, select it from the list on the left hand side of the screen and then click the **Duplicate** icon (Figure 2).

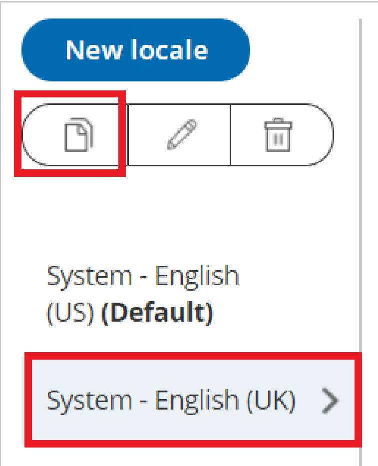


Figure 2: Click the Duplicate icon to duplicate a locale

Create a custom locale

You can create custom locales by duplicating and then editing existing locales. To create a custom, click the **New locale** button (Figure 3). In the **Custom locale** pop-up, enter a name and select which locale you would like to duplicate from.

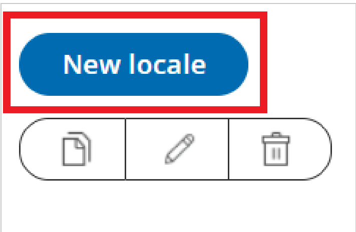


Figure 3: New Locale button

Rename a locale

To rename a locale, select a locale from the list on the left hand side of the screen and then click the **Rename locale** icon (Figure 4).

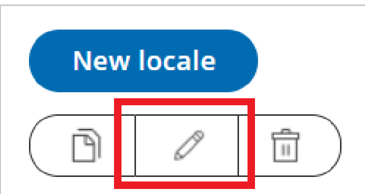


Figure 4: Rename locale button

Delete a locale

To delete a locale, select a locale from the list on the left hand side of the screen and then click the **Delete** icon (Figure 5).

Figure 5: Delete locale button

Note:

System locales cannot be renamed or deleted. To customize a locale, you'll need to duplicate it first.

Set a default locale

Any locale can be set as the account default. To set a locale as your default locale, select the desired locale from the locale list and then click **Set as default locale** at the top of the page (Figure 6).

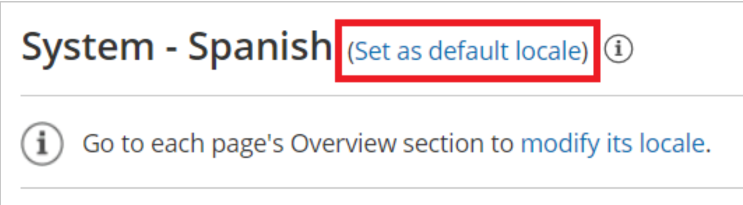


Figure 6: Set your default locale

The default locale will be automatically applied to any newly created page, but existing pages will not be affected. To modify the locale of an existing page, go the pages Overview section. Learn more about applying a locale

Preview a locale on a Booking page or Master page

You can preview a locale on any Booking page or Master page. Previewing a locale does not apply the locale to the page.

1. To preview a locale, use the drop-down menu to select the Booking page or Master page you want to preview the locale on.
2. Then, click the **Preview** button (Figure 7).

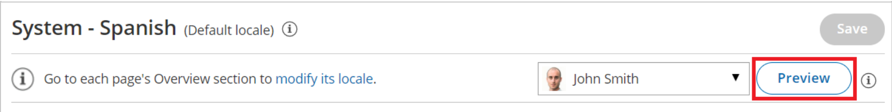


Figure 7: Preview button

Automatic translation

Each System locale comes with its own set of language- and culture-appropriate Dynamic values. This includes time zones, countries, states, locations, country codes, months, and days of the week. These values will be automatically translated when viewed by the Customer.

Note :

These values are fixed and cannot be edited, to prevent conflicts.

Date and time format

You can set the date/time format and week start day. Default settings are pre-selected for each language, but you can update them further to match your target audience preferences.

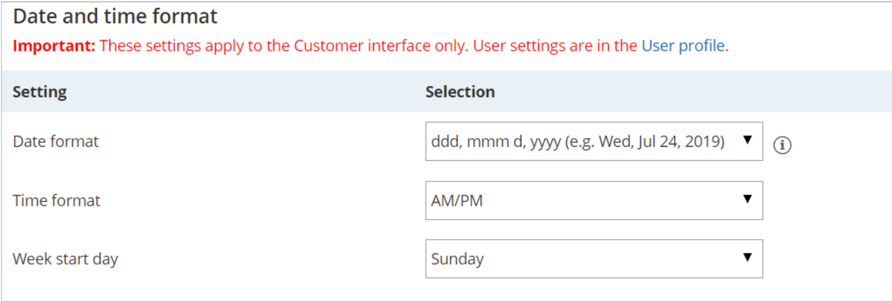


Figure 8: Date and time format settings

> **Note:**
>
> Changes you make to the date and time format settings in the Localization editor only apply to the Customer interface. To edit User date and time settings, go to the User profile.

Customer interface strings

You can customize screen text, tooltips, button and links for each part of the Customer scheduling process.

- General
- Time-zone-confirmation pop-up
- Duration pop-up
- Date and time step
- Booking form step
- Confirmation page
- Cancel/reschedule process
- Payment process
- No times available
- Deleted Booking page

This text can't be edited in System locales. To edit this text, you'll need to create a custom New locale.

Step-by-step localization

Last Modified on Oct 12, 2022

You can localize your scheduling process from start to finish, including the first page your Customer sees, the Confirmation page, cancel/reschedule process, and the notifications they will receive. This provides your Customers with a fully localized experience.

In this article, you'll learn how to localize the Customer scheduling experience.

Requirements

To edit locales and modify Notification templates, you must be a OnceHub Administrator.

All account Users, including Members, can localize the pages that they own using existing locales, Booking forms, and Notification templates.

Step-by-step localization

To localize the Customer scheduling experience from start to finish, follow the steps below.

Note:

The information in this article is only relevant if you are have added added Event types to Booking pages. If you are using Booking pages only, the Booking form section and Cancel/reschedule policy section are located on your Booking page.

Learn more about the location of the Booking form section

Localizing Event types and Booking pages

1. Go to **Booking pages** in the bar on the left.
2. Select **Localization editor** on the left.
3. Select a System locale to edit or create a Custom locale.
4. **Booking pages** in the bar on the left → select the **Booking page** that you want to edit.
5. In the Booking page Overview section, select your edited System locale or your Custom locale (Figure 3).

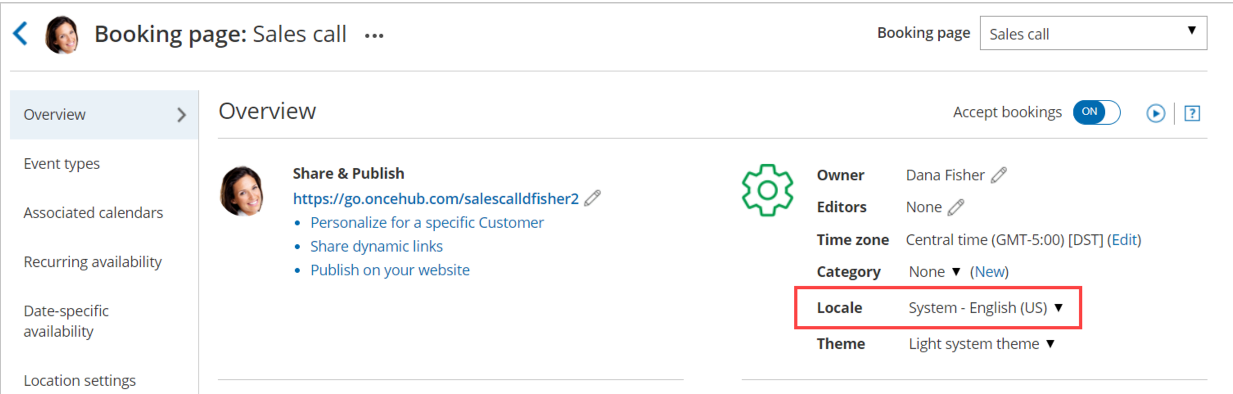


Figure 1: Selecting a Locale in the Booking page Overview section

6. In the Public content section, add Customer-facing text in the appropriate language.
7. Go to **Booking pages** in the bar on the left. Select Booking forms editor on the left.
8. Edit the text of each field so that it appears in the appropriate language.

Note:

Dynamic values such as **Country** will be shown in English in the editor, and will be translated automatically when viewed by your Customers.

9. Go to **Booking pages** in the bar on the left. Select the Event type that you want to edit.
10. In the Booking form section, select the booking Booking form that you previously edited (Figure 2) .

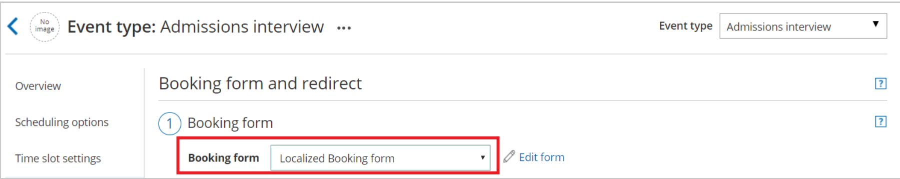


Figure 2: Selecting the edited Booking form

11. In the Payment and cancel/reschedule policy section, select the **Custom text** option and enter your policy in the appropriate language (Figure 3).

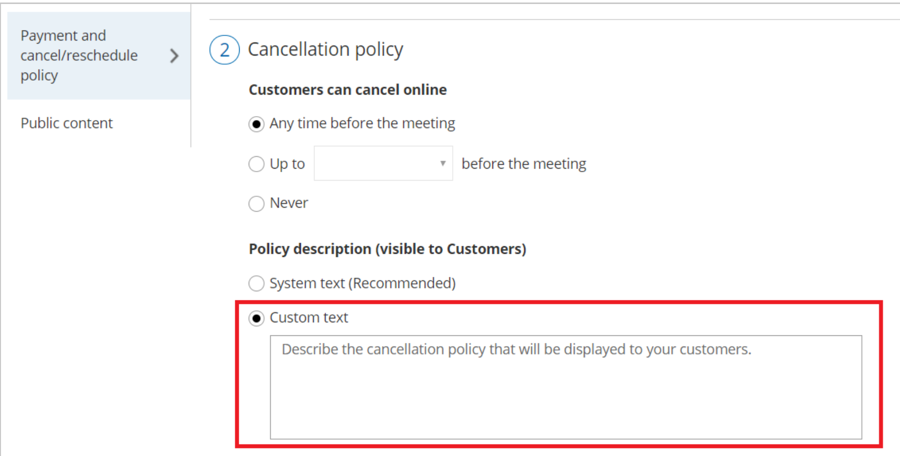


Figure 3: Entering Custom text for the Payment and cancel/reschedule policy

12. In the Public content section, add Customer-facing text in the appropriate language.

Tip:

If you use Categories or Tags for Event types or Booking pages, you should ensure that their labels and titles are written in the appropriate language.

Localizing Master pages

1. In the Master page Overview section, select your Custom locale or select the same System locale you selected in the Localization editor (Figure 4).

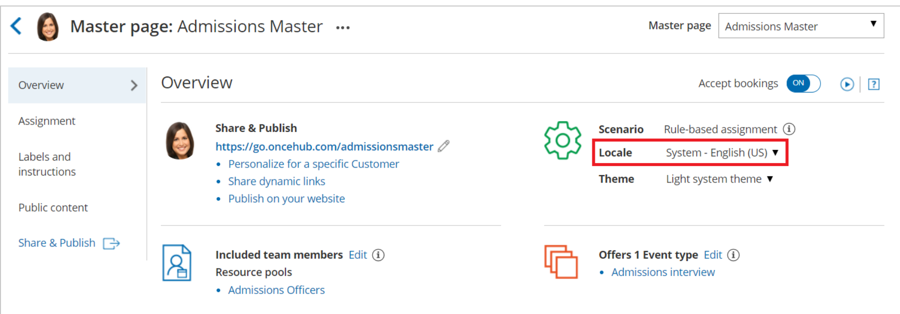


Figure 4: Selecting a Locale in the Master page Overview section

Note:

The locale selected for the Master page will override the locale selected on any of the included Booking pages.

2. In the Labels and instructions section, add labels and instructions in the appropriate language.
3. In the Public content section, add Customer-facing text in the appropriate language.

Your localized Booking page or Master page is now ready to be shared with Customers or published on your website.

Tip:

If you have Customers in different countries, or Customers who speak a variety of languages, you can use a Booking page or Master page for each Customer segment. Repeat the same process for each page based on the target culture, language, country, or geographic location.

To ensure that each of your Customer segments experiences their localized scheduling process, you must share or publish the correct link or page with the corresponding audience.

Localizing Customer notifications

1. Go to **Booking pages** in the bar on the left.
2. On the left, select the Notification templates editor.
3. Create a Custom notification template and translate it into the appropriate language.
4. Go to **Booking pages** in the bar on the left and select the Event type that you want to edit.
5. In the Customer notifications section, select the Custom template you previously created.

Note:

In the Notification templates editor, Dynamic fields are shown in English only in the editor. These fields will be translated into the set locale when Custom notifications are sent to the Customer.

User notifications are always sent in English.

System and Custom locales

Last Modified on Oct 1, 2019

A locale is a collection of settings that define the Customer interface language and the date/time formats of your pages. A locale defines every line of text on your Booking pages, including instructions, tooltips, buttons, and more.

You can use System locales provided out of the box or create Custom locales, which allow you to edit Customer interface text. System and Custom locales are managed in the Localization editor, and can be applied to Booking pages and Master pages.

In this article, you'll learn about the differences between System locales and Custom locales.

System locales

Every account is created with the following seven **System locales** out-of-the-box:

- English (US)
- English (UK)
- French
- German
- Spanish
- Portuguese (Brazil)
- Dutch

Each System locale comes with its own set of language-appropriate and culture-appropriate Dynamic values which are automatically translated when viewed by the Customer.

Custom locales

You can create **Custom locales** which allow for both date/time format modification and Customer interface text editing. Custom locales are created by duplicating an existing locale.

Custom locales enable you to modify any Customer interface text. All texts are editable and can be found by using the browser search function (Ctrl + F on Windows or ⌘ + F on Mac). Find the string in **English text** in the left column and edit the translation of it in the right column according to the selected locale (Figure 1).

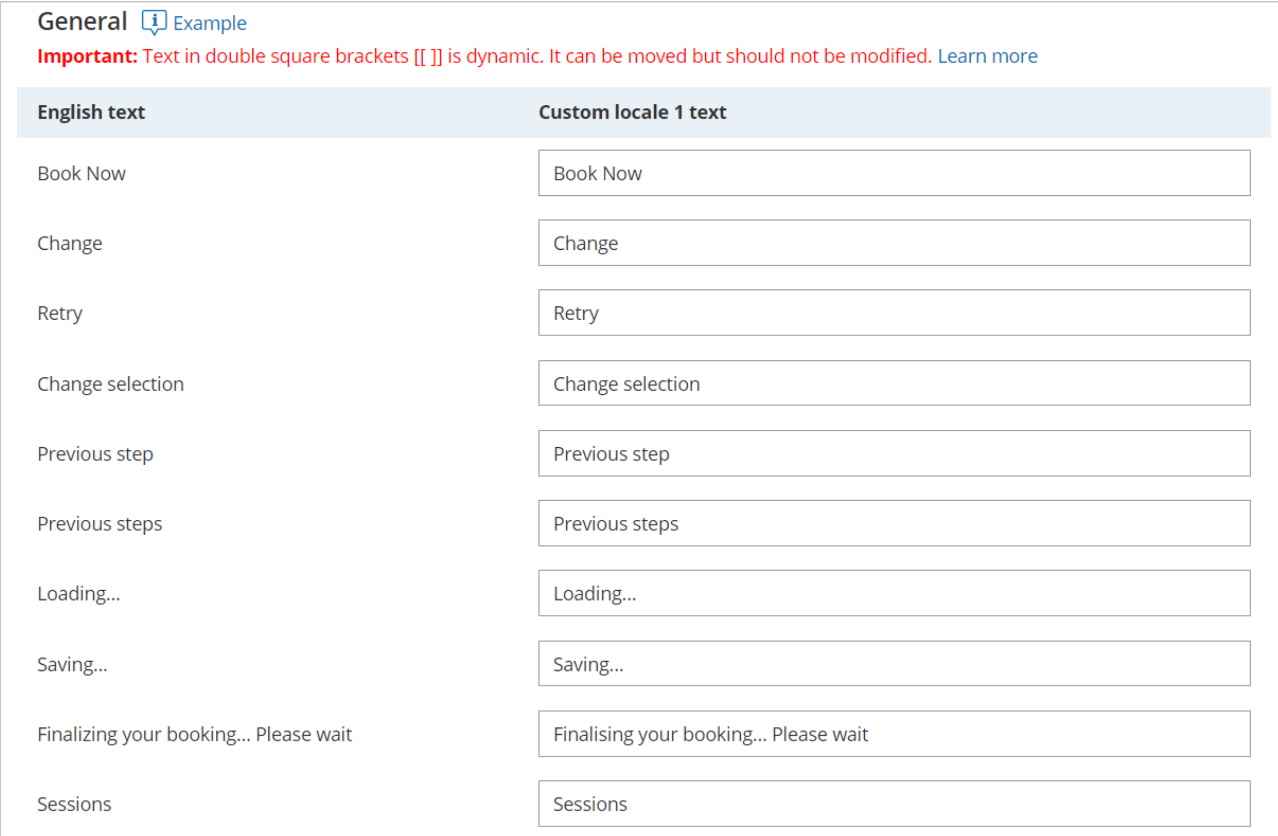


Figure 1: General section of the Localization editor

Comparison of System and Custom locales

	System locale	Custom locale
Translation of Dynamic values including: • Time zones • Countries • States • Locations • Country codes • Months • Days of the week	Dynamic values will be automatically translated into the selected language when viewed by the Customer. Note: To prevent conflicts, these values are fixed and cannot be edited.	Dynamic values will always reflect the parent locale from which they were duplicated. Note: To prevent conflicts, these values are fixed and cannot be edited.
Date and time format	Each System locale is preconfigured with date/time formats to match the target locale. You can customize these formats if your Customers expect them to be different.	The date/time formats will always reflect the parent locale from which they were duplicated. You can customize these formats if your Customers expect them to be different.

Customer interface strings	Screen text, tooltips, button, and links for each part of the Customer scheduling process are automatically translated for each locale. This text cannot be edited. To edit any Customer interface text, you will need to create a Custom locale.	You can modify any Customer interface text.

Editing Customer interface text

Last Modified on Oct 12, 2022

If you want to have more control over Customer-facing text in your Booking page, you can use the Localization editor to change every line of Customer interface text.

In this article, you'll learn how to edit Customer interface text.

Editing Customer interface text

1. Go to **Booking pages** in the bar on the left.
2. On the left, select the **Localization editor.**
3. Click the **New locale** button (Figure 1).

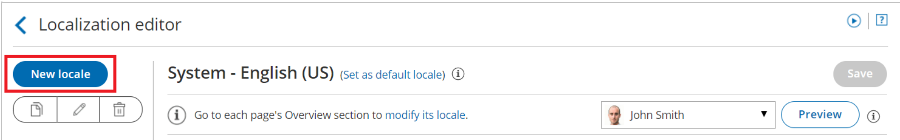


Figure 1: New locale button

4. In the **Custom locale** pop-up, add a name for your locale and select an existing locale to duplicate as a basis for your new locale (Figure 2).

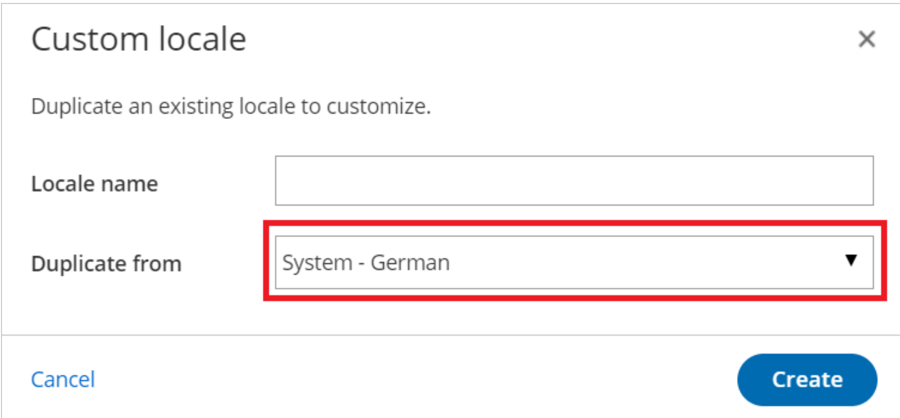


Figure 2: Custom locale pop-up

> **Note :**
>
> Dynamic values including time zones, countries, states, locations, country codes, months, and days of the week will always reflect the parent locale from which they were duplicated.

5. Edit the text in the field in the right column (Figure 3) corresponding to the string in the **English text** column on the left. Some words may appear in multiple strings, so make sure you edit the correct string.
   If you want to edit a specific string, use the browser search function (Ctrl + F on Windows or ⌘ + F on Mac) to find it.

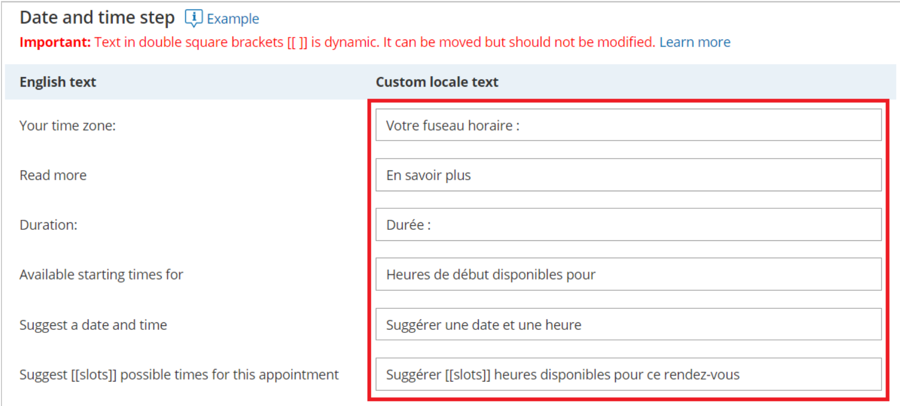


Figure 3: Custom locale text column

> **Note:**
>
> Parameters in double square brackets [[ ]] can be moved within the string.
>
> It's important to keep the brackets intact as they will be replaced with live data when viewed by the Customer.

6. To preview a locale on a Booking page or Master page with your Custom locale, use the drop-down menu at the top right of the editor screen to select the Booking page or Master page. Then, click **Preview.**

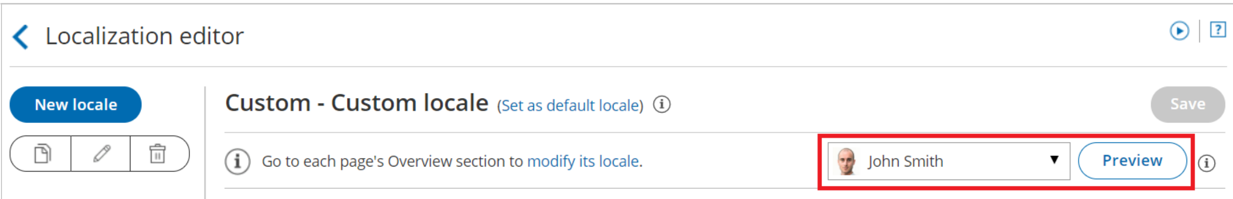


Figure 4: Locale Preview button

> **Note :**
>
> Previewing a locale does not apply the locale to the page.

7. When you've made all the necessary changes, click **Save**.

Finally, apply the Custom locale to your pages on the Overview section of the Booking page or Master page.

Learn more about the steps to fully localize the Customer scheduling experience

Applying a Locale

Last Modified on Oct 12, 2022

Locales are configured in the Localization editor on the account level and applied to each Booking page and Master page individually. When a locale is applied to a page, any subsequent changes made to that locale are visible to the Customer. The applied locale determines the language of the page and the date/time formats used.

In this article, you'll learn about applying a locale to a Booking page or Master page and to Customer notifications.

Applying a locale to a Booking page or Master page

1. Go to **Booking pages** in the bar on the left.
2. Select the Booking page or Master page that you want to localize.
3. In the page's **Overview** section, use the **Locale** drop-down menu to select the locale you want to apply to that page (Figure 1). The change is automatically saved.

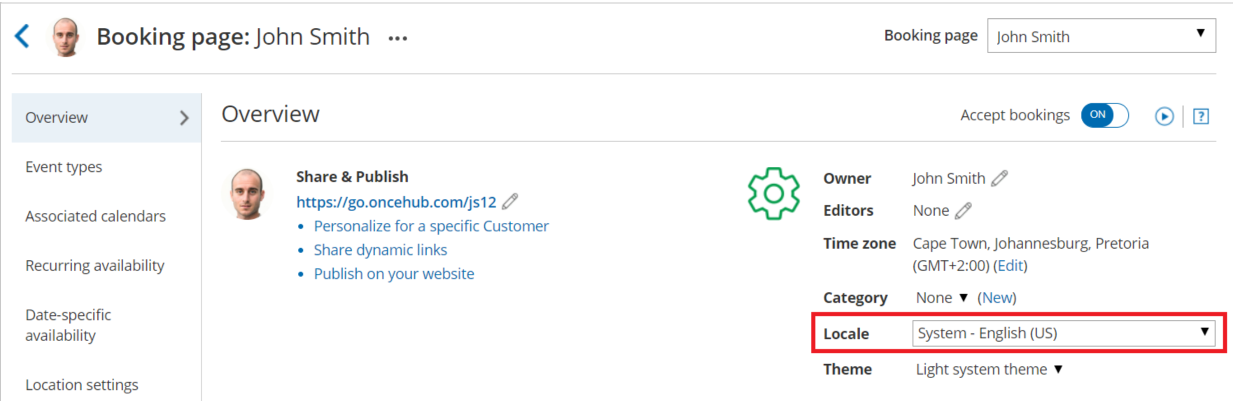


Figure 1: Booking page Overview section

Note:

Applying a locale to a Master page always overrides the locales applied to any Booking pages included in that Master page.

Applying a locale to Customer notifications

The locale of the Booking page or Master page determines the date/time formats and the language of the Dynamic fields in Customer notifications including outgoing emails, SMS messages, and the calendar event. The text in these notifications is automatically translated.

- Dynamic fields in notifications are only translated for Customer notifications based on Custom templates. Dynamic fields in User notifications and Default templates always remain in English.
- Static text is not automatically translated. To translate the static text of these notifications, you'll need to use Custom notification templates.

Localization of Default notification templates vs. Custom notification templates

	Default templates	Custom templates

User notifications by email and SMS	OnceHub Dynamic fields are shown in English. Date/time format follows User profile settings.	OnceHub Dynamic fields are shown in English. Date/time format follows User profile settings.
Customer notifications by email and SMS and the calendar event	OnceHub Dynamic fields are shown in English. Date/time format follows User profile settings.	OnceHub dynamic fields such as time zone, country, and location are shown in the locale selected on the Booking page. Date/time format follows locale settings.

Setting a default locale

The account's default locale is set under the Localization editor. To set a locale as your default locale, select the desired locale from the locale list and then click **Set as default locale** at the top of the page (Figure 2).

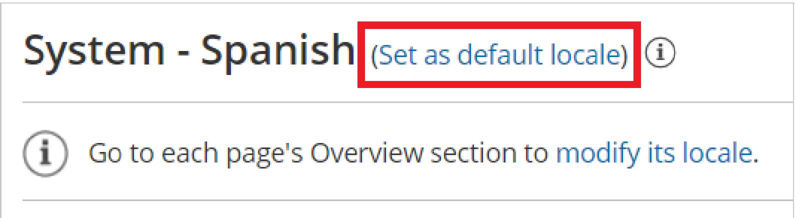


Figure 2: Set your default locale

The default locale will be automatically applied to any newly created page, but existing pages will not be affected.

Introduction to Email from your Domain

Last Modified on Mar 7, 2024

Email from your domain allows you to personalize and brand your OnceHub email communications. Using Email from your domain will associate emails generated by OnceHub with your company and team members, making the experience more personal for your customers and users.

Email from your domain involves customizing user and account email settings. This allows you to send all emails related to booking activity, the OnceHub widget, and new user sign-ups from your domain and email address of choice.

The Email from your domain settings are customized at the organization-level. When activated, the Sending email address is changed for all users. When you don't use Email from your domain, user email settings such as the name label for the Sending email address and the reply-to email are customized by individual account users.

You do not need an assigned product license to update the Email from your domain settings in OnceHub, though you do need to be an Administrator. Learn more

To configure the Email from your domain feature, go to your account settings → select **Security and compliance** and then **Email from your domain**

Email settings when not using Email from your domain

When you don't use Email from your domain, user email settings are customized for/by individual account users.

To edit the user email settings, follow these steps:

1. Open your OnceHub Account by clicking the gear icon at the top right → Users
2. From the main menu, select the user you would like to change email settings for
3. From the menu on the left, select Email notifications (Figure 1).

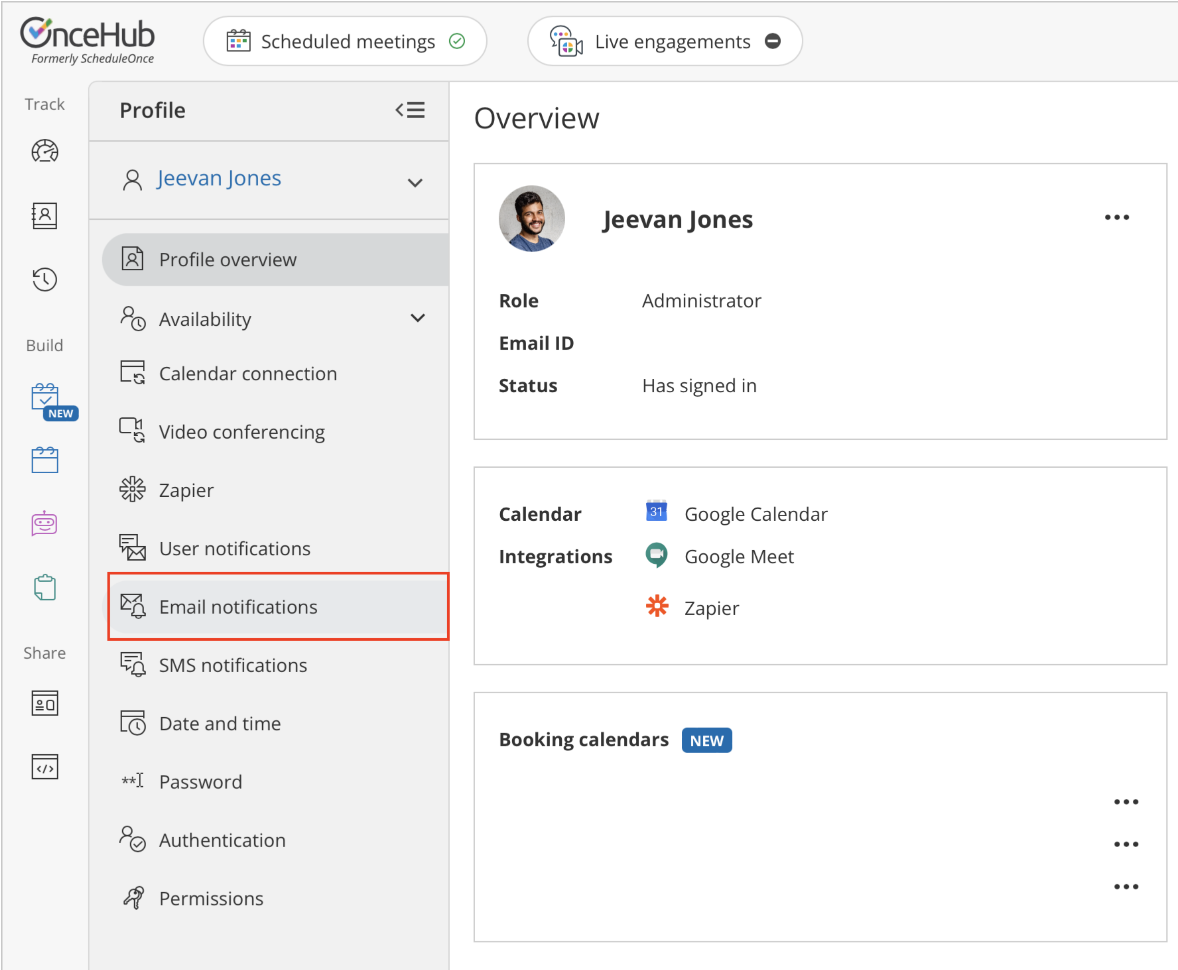


Figure 1: Email notifications section

4. Here you can edit settings such as the **Sent from name** label for the sending email address and the **Customer replies sent to** email address.
5. Once you've finished editing, click **Save**.

Email notifications sent to Customers

When you don't use Email from your domain, emails sent to Customers will come from “OnceHub Mailer <mailer@oncehub.com>”. The **Sent from name** label and the **Customer replies sent to** email address can be customized by each User (Figure 2).

Figure 2: Email notifications to User's Customers

Let’s say John Smith, with the email address “john@example.com”, is a OnceHub User. He can set the **Sent from name** label to display "John Smith" to his Customers. John’s Customers will see “John Smith <mailer@oncehub.com>” in emails from him.

By default, the **Sent from name** will be the User's name that was entered when they created their account.

> **Note:**
>
> Changing your name in the Personal details section of the User profile does not change the **Sent from name** label.

When customizing the **Customer replies sent to** email address, John can choose to keep "john@example.com", or he can change it to his assistant Sarah's email address, "sarah.jones@example.com". If he does this, all Customer replies to booking notifications will go to Sarah, not John.

Email notifications sent to Users

Emails sent to Users will come from "OnceHub Mailer <mailer@oncehub.com>" and not show a specific User's name. This makes it clear which email messages are related to a OnceHub booking. The email address used for receiving notifications is the same as the Users's Email ID. Learn more about changing your email ID

Learn more about configuring User email settings

Email settings when using Email from your domain

With Email from your domain, emails related to booking activity are customized to come from the domain and email address of your choice. This Sending email address will be universal for every User. Learn how to set up and test Email from your domain

Let's say you have a company called Example that owns the domain Example.com. Example's OnceHub Administrator can set the **Sending email address** for the account to be "scheduling@example.com" and the **Sending email name label** to "Example" (Figure 3). Emails sent to Customers will come from "Example <scheduling@example.com>".

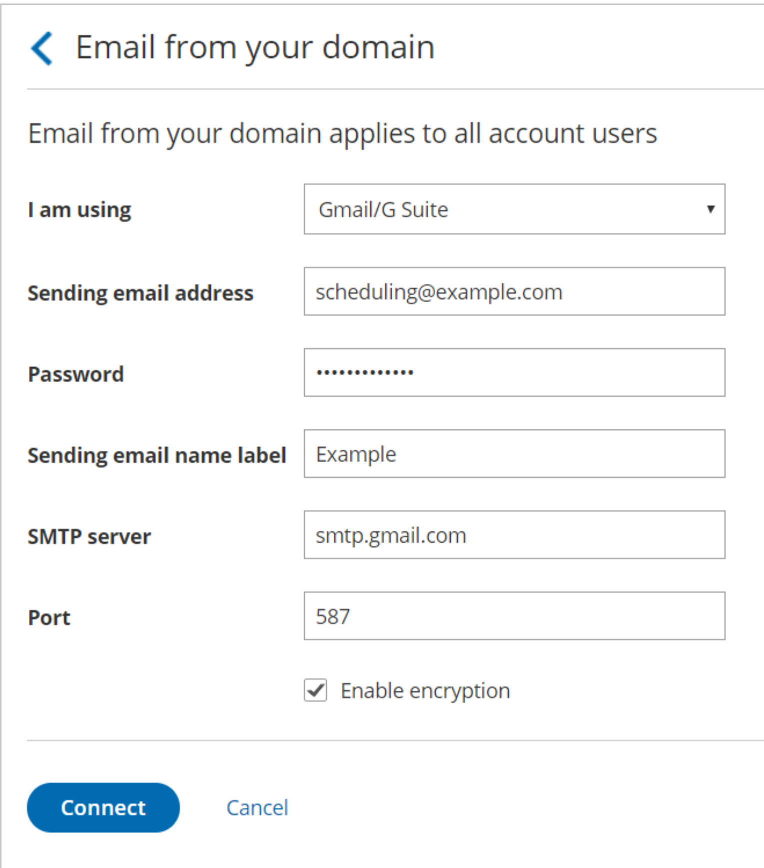


Figure 3: Adding a Sending email address

> **Note:**
> When you use Email from your domain, the reply-to email address in notifications sent to Customers will be the email address of the Booking page Owner, as set in the Notifications section of the Owner's User profile.

To locate the Email from your domain settings, follow these steps:

1. Go to **Account settings** by clicking the gear icon at the top right
2. From the drop-down menu, select **Security and compliance**
3. From the bar on the left, select **Email from your domain**

Learn more about setting up Email from your domain

Email notifications sent to Customers

Email notifications sent to Customers will be sent from the universal email address with your domain name. The name label and the reply-to email address will be the Booking page Owner's email address, as set in the Email notifications section of the Owner's User profile.

For example, the OnceHub Administrator for your company account sets the **Sending email address** for the account to be "scheduling@example.com" and the **Sending email name label** to be "Example" (Figure 4).

Emails from the User John Smith will be shown as sent from “Example <scheduling@example.com>”. The reply-to address will be the one that John set in his User profile Email notifications, "john@example.com".

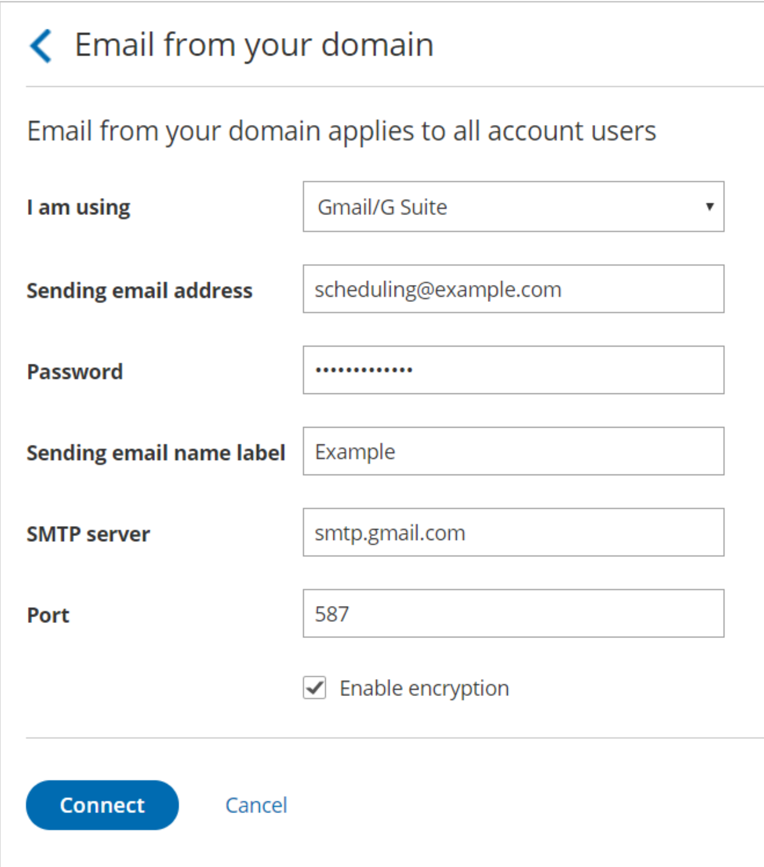


Figure 4: Adding a Sending email address and Sending email name label

Email notifications sent to Users

Booking-related emails and new User sign-up emails sent to Users in the OnceHub account will come from the **Sending**

email address and **Sending email name label** and not from a specific User's name.

For example, if the OnceHub Administrator for your company account sets the **Sending email address** for the account to be "scheduling@example.com" and the **Sending email name label** to be "Example", email notifications sent to Users will come from "Example<scheduling@example.com>".

Note:

If you're using Office 365, your Microsoft account display name that you set in your Microsoft account will be the Sending email name label for all email notifications to Users.

What happens if my email domain experiences issues?

In cases of connection errors with your email domain, an automatic fallback that will send emails from the OnceHub Mailer is turned on until the connection is restored.

Learn more about troubleshooting Email from your domain

Setting up email from your domain

Last Modified on Mar 7, 2024

Email from your domain allows you to personalize and brand your OnceHub email communications. You can use email from your domain to send all emails related to booking activity from your company's domain and email address of your choice. Email from your domain is customized at the organization-level and changes the Sending email address for all users.

You do not need an assigned product license to update the Email from your domain settings in OnceHub, though you do need to be an administrator. Learn more

In this article, you'll learn how to set up Email from your domain.

Requirements

To set up Email from your domain, you must be a OnceHub Administrator.

Setting up Email from your domain

Note:

Only admins are able to access account settings

1. Go to **Account settings** by clicking the gear icon at the top right
2. From the drop-down menu, select **Security and compliance**
3. From the bar on the left, select **Email from your domain**
4. Click the **Connect your mail server** button.
5. The **Email from your domain** page will appear (Figure 1).

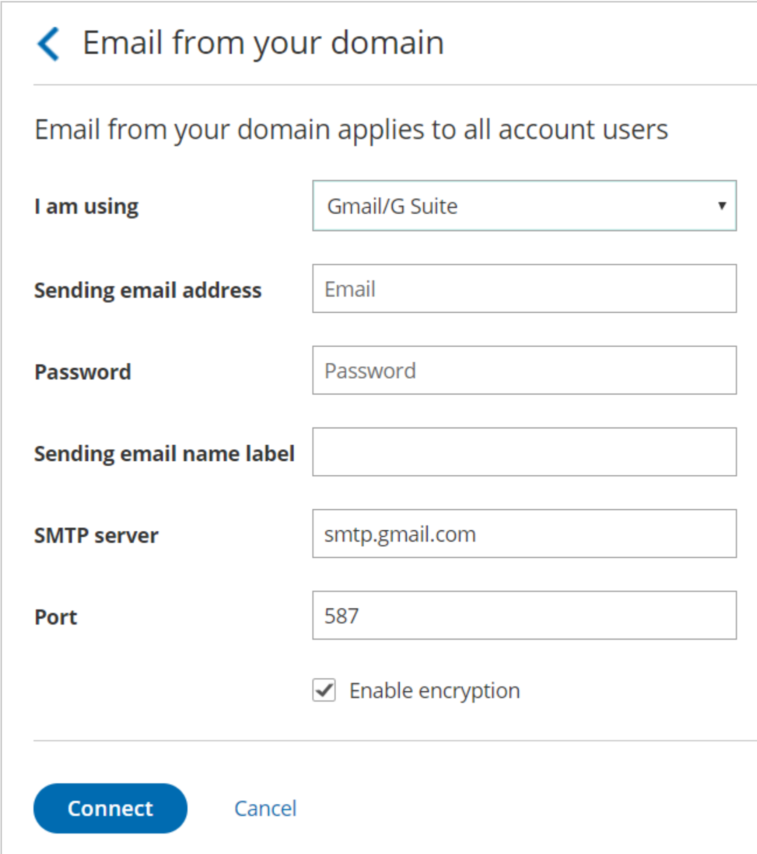


Figure 1: Email from your domain page

6. Choose your email server from the **I am using** drop-down menu.
7. Enter the **Sending email address**. This will be the sending address for all Customer and User notifications for your OnceHub account.
8. If you selected **Amazon SES** or **Other** in Step 7, you will need to enter a **User name** (Figure 2).

- **Amazon SES:** You will need your Amazon SES SMTP User name. Learn more about obtaining your Amazon SES SMTP credentials
- **Other:** You will need to figure out whether your email server requires SMTP credentials. If SMTP credentials are required, enter your SMTP User name. If not, enter the **Sending email address** as the User name.

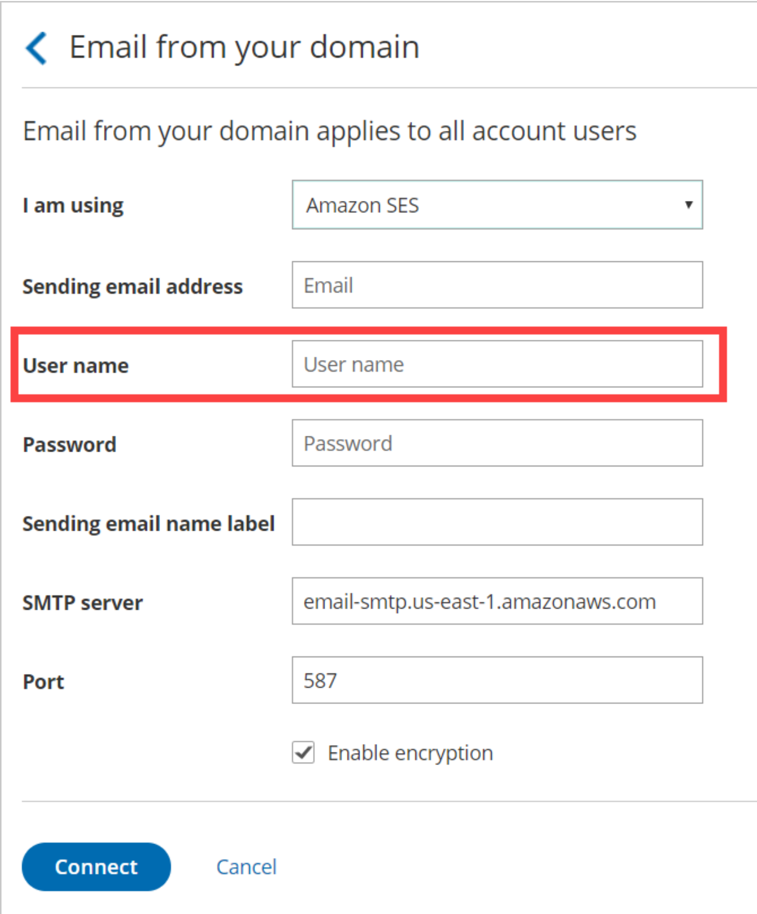


Figure 2: Enter a User name if you selected Amazon SES or Other

9. Enter the **Password**. Please note this may not be the password you used to sign in to your email.

- If you're using Office 365, enter the password you use to sign in to your email account.
- If you're using G Suite, you'll need to either enable access to less secure apps OR use 2-Step Verification with an app-specific password. Learn more about connecting to a Google email server
- If you're using Amazon SES, you'll need the SMTP password, which is different from the AWS password you use to enter your email account. Learn more about obtaining your Amazon SES SMTP credentials
- If you selected **Other** in Step 4, you'll need to figure out whether your email server requires SMTP credentials. If SMTP credentials are required, enter your SMTP password. If not, enter the password you use to sign into your email account.

10. Enter a **Sending email name label**. This will be the default label displayed in email notifications to every User on the account instead of the default label *OnceHub Mailer*.

> **Note :**
>
> If you selected **Office 365** in Step 7, your Microsoft account display name that you set in your Microsoft account will be the default label for all email notifications to Users.

11. Enter the **SMTP server** URL.

- If you are using an internally-hosted mail server, you will need to allow OnceHub to access it. The OnceHub server IP addresses are:
  52.184.200.53
  52.177.197.227

13.77.100.95
52.177.198.87
52.225.219.177
52.225.218.66
52.177.199.129
13.68.89.72
40.84.2.28
104.209.238.147
40.123.38.105

- If you are using a Microsoft Exchange server, you will need to enable relaying for the OnceHub servers. The IP addresses are:
  52.184.200.53
  52.177.197.227
  13.77.100.95
  52.177.198.87
  52.225.219.177
  52.225.218.66
  52.177.199.129
  13.68.89.72
  40.123.38.105

12. Enter the SMTP server port in the **Port** field.
13. Click the **Connect** button.
14. Once you are successfully connected, you should send a test email to make sure that Email from your domain is set up correctly (Figure 3).

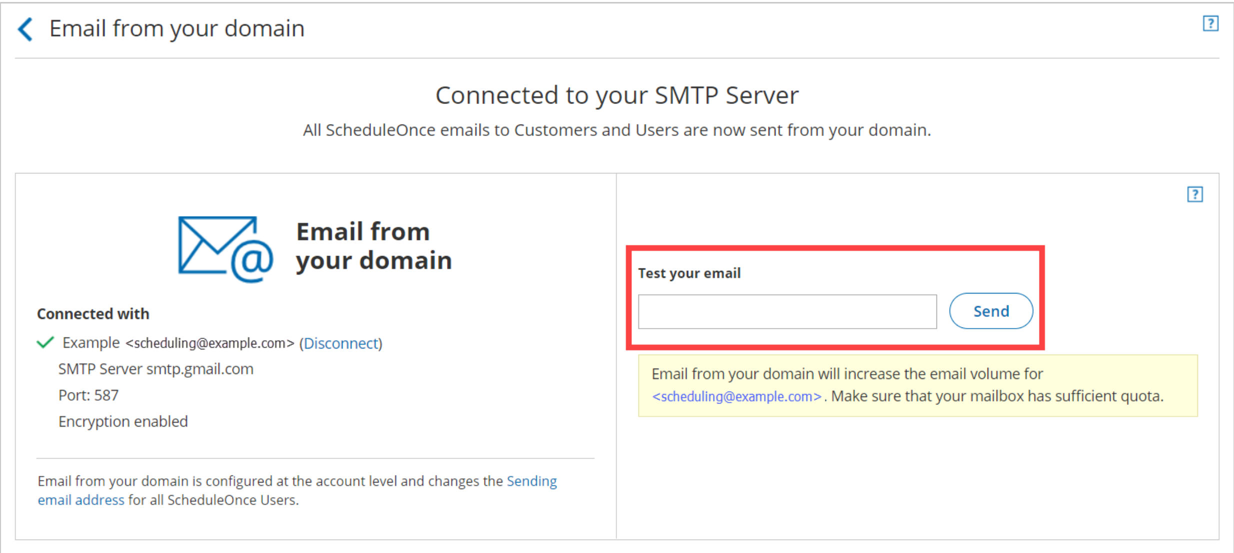


Figure 3: Test your email

Congratulations! You have completed the setup of email from your domain.

Note:

Please be aware that using Email from your domain is likely to increase the daily sending volume in your connected email mailbox from which OnceHub emails are sent.

It is advisable to check with your email provider that your email account can handle the estimated notifications volume.

Custom Booking domain

Last Modified on Oct 12, 2022

Custom Booking domains are available to eligible account holders. Please contact us for more details.

OnceHub uses the go.oncehub.com domain for your Booking page links. If you want to use a custom domain for your Booking pages, the OnceHub domain option can be replaced with your own domain. For example, if your domain is yourdomain.com and your Booking page link is go.oncehub.com/dana, you can use book.yourdomain.com/dana as your custom Booking page link.

To enable this, you will need to follow these steps:

1. In your domain's DNS settings, add a CNAME for go.oncehub.com. If you are not sure how to do this, we recommend that you type into Google "Add CNAME to <Your DNS host>" and you will get specific instructions. For example, if your DNS host is GoDaddy, you will type "Add CNAME to GoDaddy".
2. Make a note of the new subdomain for the CNAME that you added.
3. Contact us so that we can register your domain and enable this feature.

Note:

Custom booking domains use HTTP only. HTTPS is not supported currently for custom booking domains.

Installing OnceHub for Gmail

Last Modified on Dec 13, 2019

The OnceHub for Gmail extension enables you to schedule meetings directly from your Gmail account. OnceHub for Gmail gives you instant access to all of your Booking page links without the need to change apps. You can create personalized links or one-time links, copy them in a single click, and send them in an email.

In this article, you'll learn how to install OnceHub for Gmail.

Installing OnceHub for Gmail

Note :

OnceHub for Gmail is only available for Chrome.

1. Go to the Chrome Web Store listing for OnceHub for Gmail.
2. Click **Add to Chrome** (Figure 1).

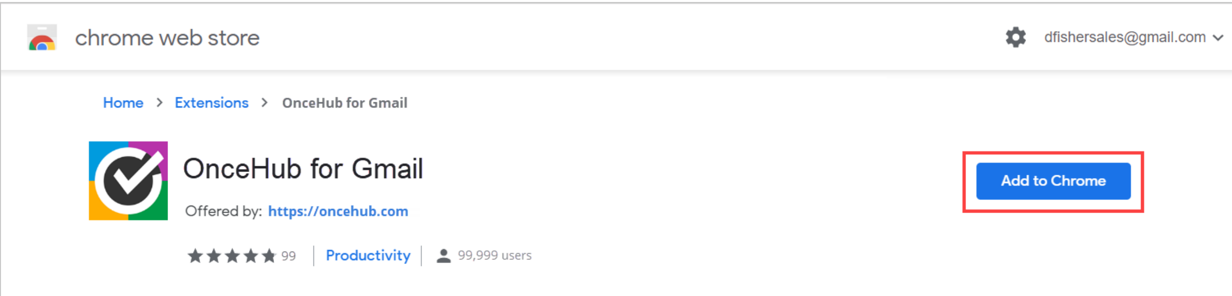


Figure 1: Add to Chrome

3. The installation permissions pop-up will appear.
4. Click **Add Extension** (Figure 2).

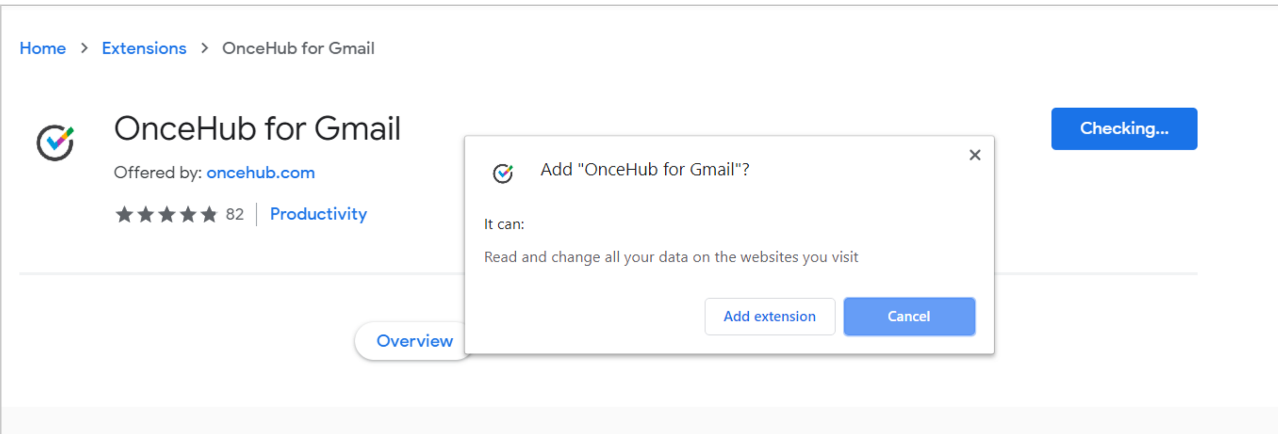


Figure 2: Add Extension

5. **Once installed, you will see the OnceHub for Gmail confirmation screen.**

You're all set! You can now have access to your ScheduleOnce Booking pages and Master pages inside Gmail and can create personalized links or one-time links.

Learn more about sending Personalized links using OnceHub for Gmail

Learn more about sending one-time links using OnceHub for Gmail

Sending Personalized links using OnceHub for Gmail

Last Modified on Dec 13, 2019

The OnceHub for Gmail extension enables you to schedule meetings directly from your Gmail account. OnceHub for Gmail gives you instant access to all of your Booking page links without the need to change apps.

In this article, you'll learn about sending Personalized links using OnceHub for Gmail.

Understanding Personalized links

Each Booking page and Master page has its own unique Public link that can be shared with your prospects and Customers. When you personalize the scheduling experience for your prospects and Customers, they only have to pick a time without having to provide information that you already have.

When you create a Personalized link using OnceHub for Gmail, the Customer's name and email address is automatically taken from the email. When the Customer uses the Personalized link to schedule a meeting, they only need to choose a date and time, then confirm the meeting. The Booking form is skipped without having to re-enter their contact information.

Learn more about using Personalized links

Note :

You can also send one-time links using OnceHub for Gmail.

Learn more about sending one-time links using OnceHub for Gmail

Requirements

To send Personalized links using OnceHub for Gmail, you must:

- Install OnceHub for Gmail.
- Have a ScheduleOnce User license.
- Create a Booking page in your ScheduleOnce account.

Sending Personalized links using OnceHub for Gmail

When you generate a Personalized link using OnceHub for Gmail, the link is automatically personalized using the "To" field in the email you are composing.

If you have more than one email address in the "To" field, OnceHub for Gmail lets you confirm the details of the Personalized link before you copy it (Figure 1). By default, the **Customer name** and **Customer email** are taken from the first email address in the "To" field.

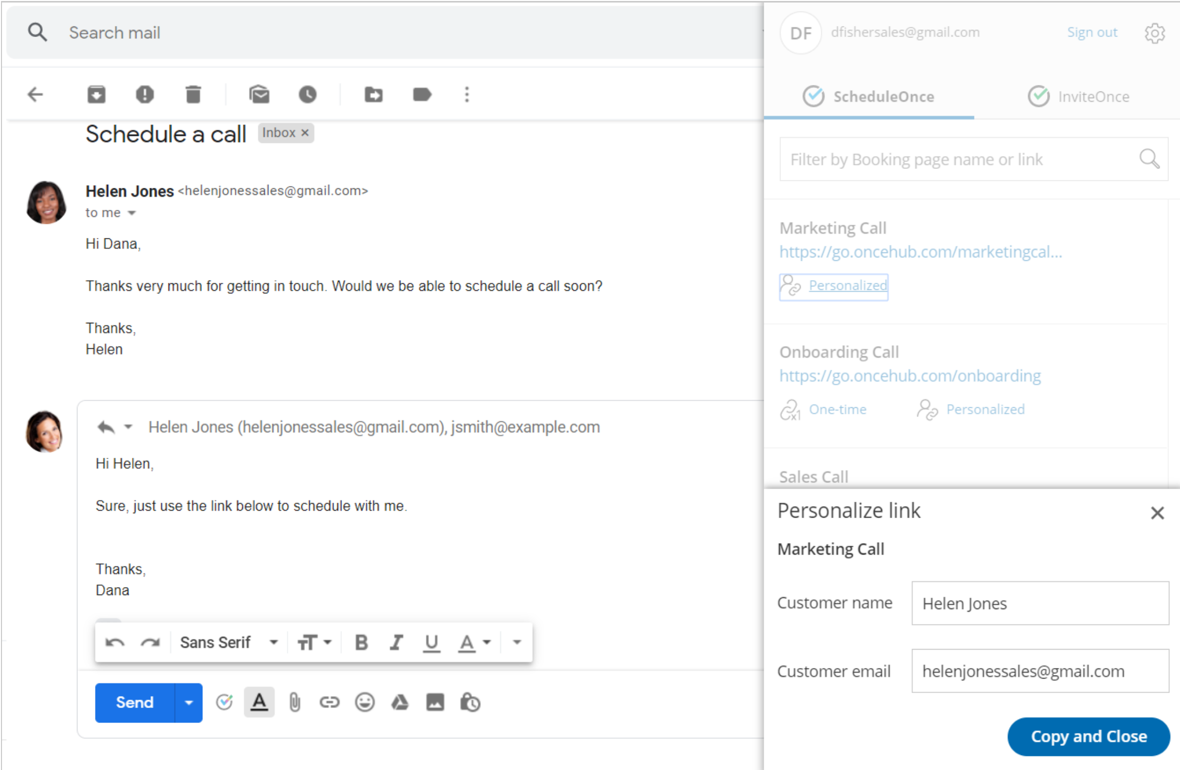


Figure 1: Confirming the details of a Personalized link

When replying to an email

1. Sign in to your Gmail account.
2. Open the email that would like to reply to.
3. Click **Reply**.
4. Click the OnceHub for Gmail icon (Figure 2).

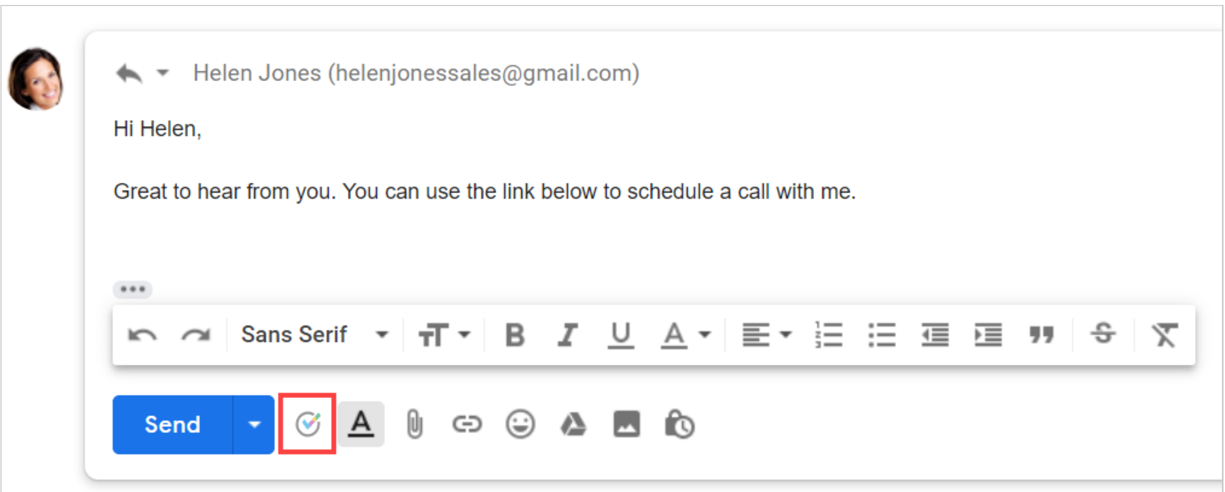


Figure 2: OnceHub for Gmail icon

5. The OnceHub for Gmail extension window will open (Figure 3).

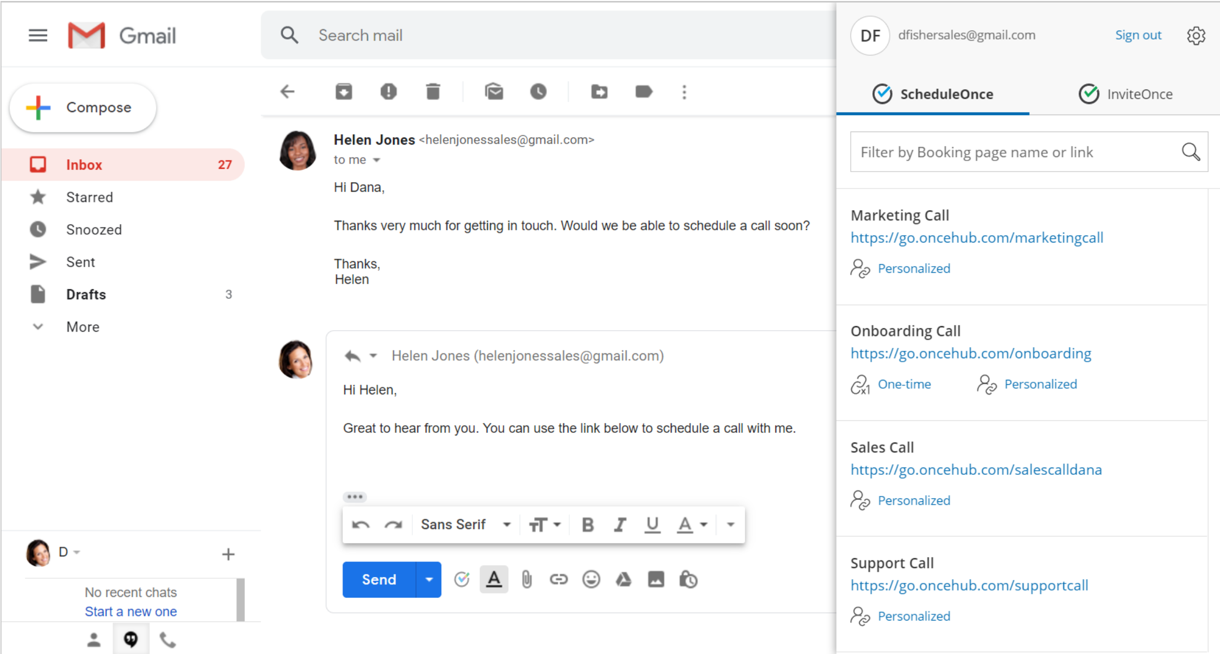


Figure 3: OnceHub for Gmail extension window

6. Click **Personalized** next to the Booking page you want to share (Figure 4).

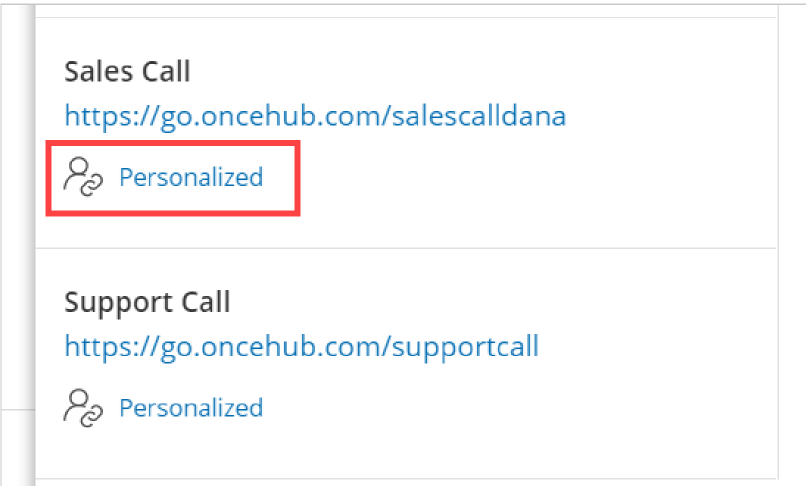


Figure 4: Generating a Personalized link

7. You will see the **Copied** confirmation when the link has been generated and copied to your clipboard (Figure 5).

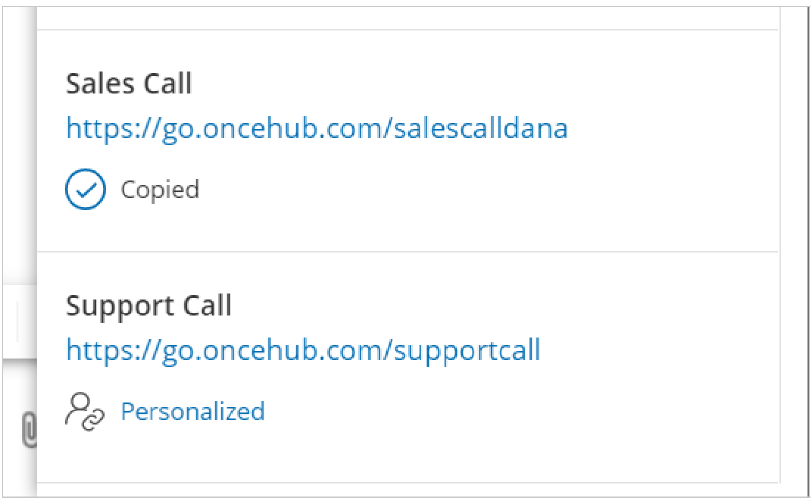


Figure 5: Personalized link copied

8. Create a customized html link by clicking the **Insert Link** button on the bottom email menu. (Figure 6).

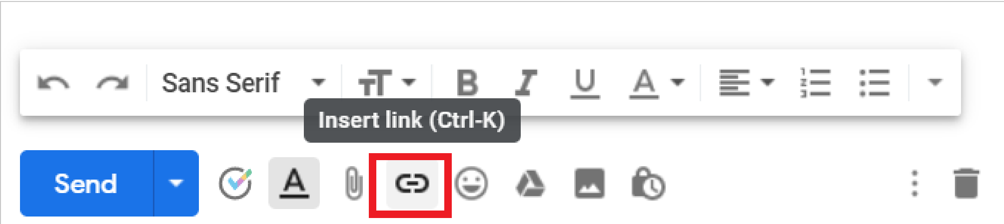


Figure 6: Insert Link button in Gmail.

9 A window will appear (Figure 7). Insert your booking link and the text you would like to display. Click OK.

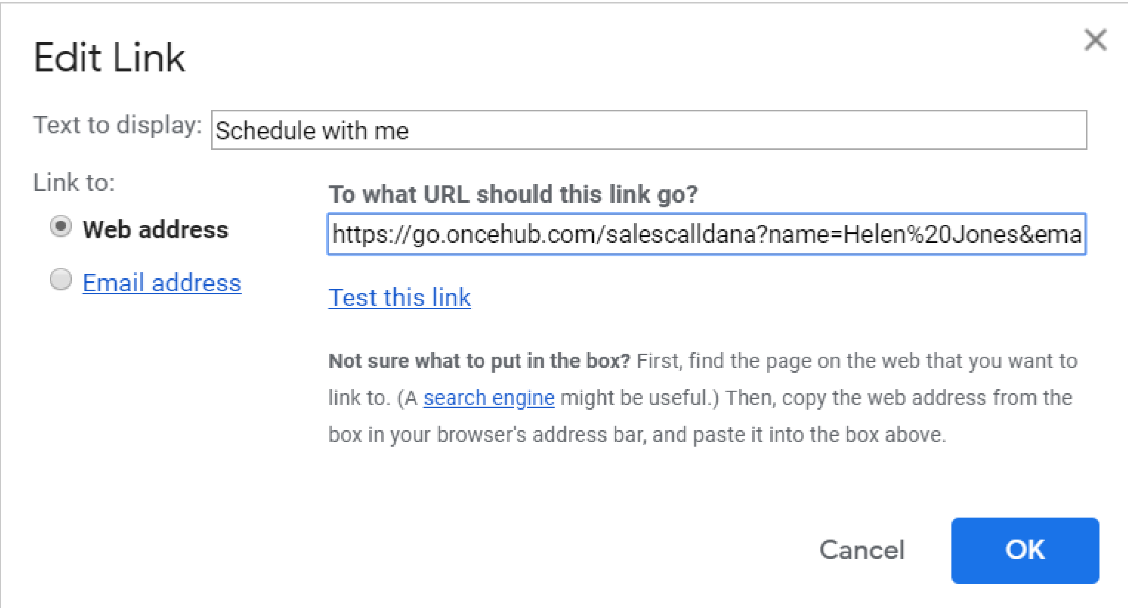


Figure 7: Insert Link window

10. Your booking link now will now appear as an html link. (Figure 8).

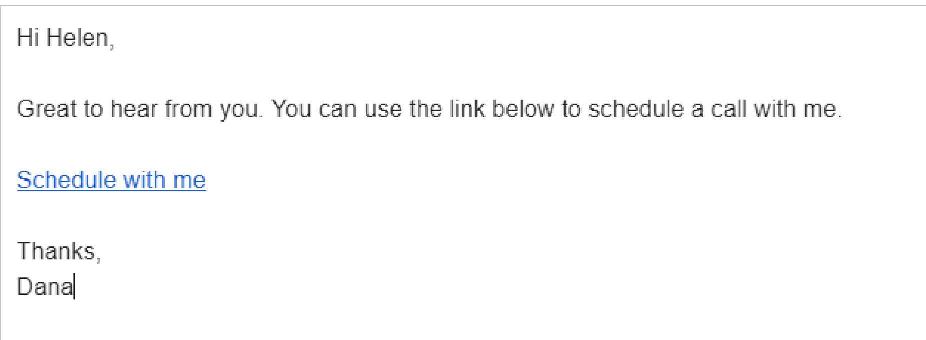


Figure 8: Html link in your email.

11. You can also paste your copied booking link directly into the body of your email without customizing it.

When composing a new email

1. Sign in to your Gmail account.
2. Click **Compose** to create a new email.
3. In the **To** field, enter the email address of the person you want to share your Booking page link with.

> **Note :**
>
> If you do not enter an email address, you will need to enter the **Customer name** and **Customer email** in the OnceHub for Gmail extension window when you generate a Personalized link.

4. Click the OnceHub for Gmail icon (Figure 10).

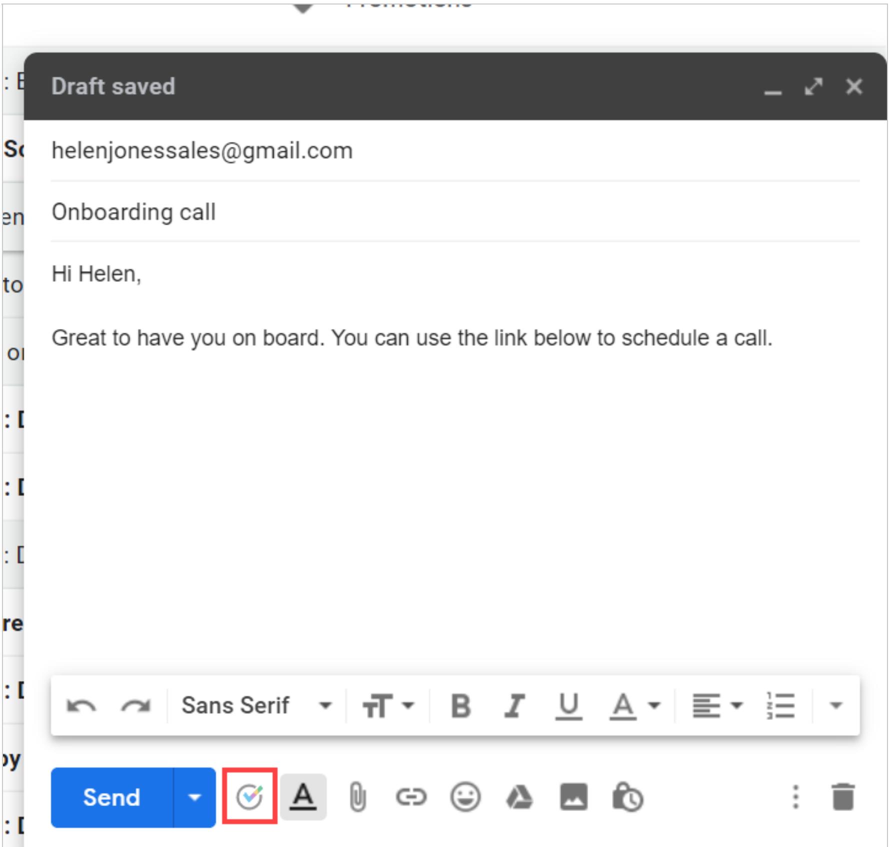


Figure 10: OnceHub for Gmail icon

5. The OnceHub for Gmail extension window will open (Figure 11).

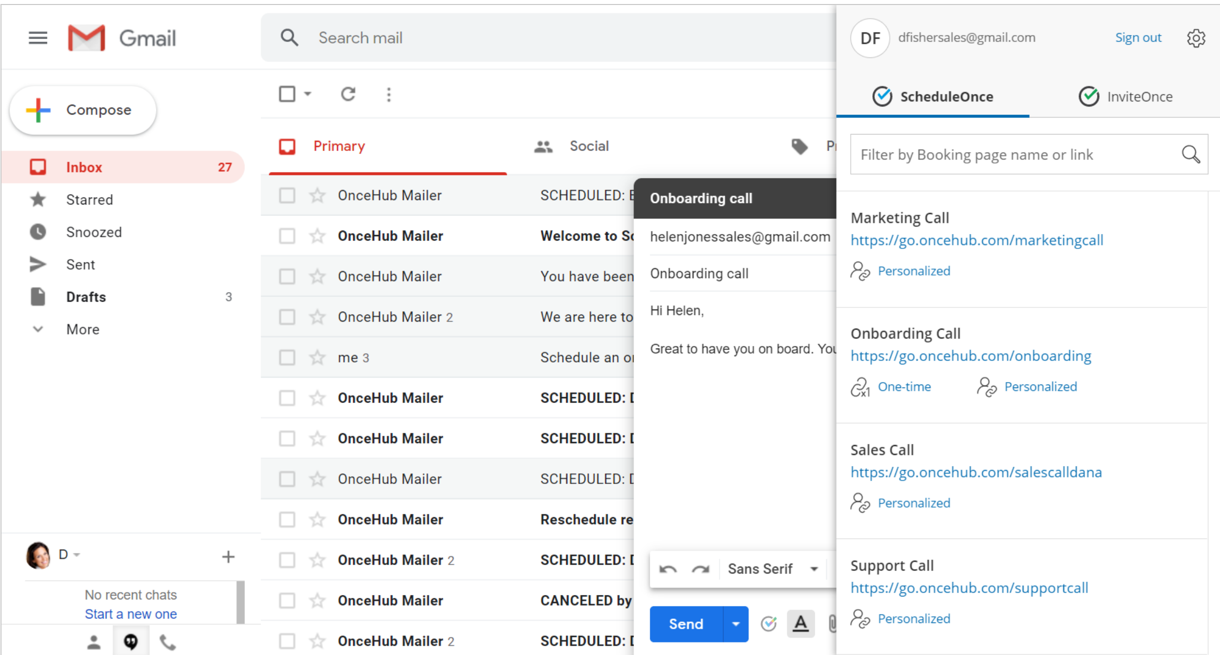


Figure 11: OnceHub for Gmail extension window

6. Click **Personalized** next to the Booking page you want to share (Figure 12).

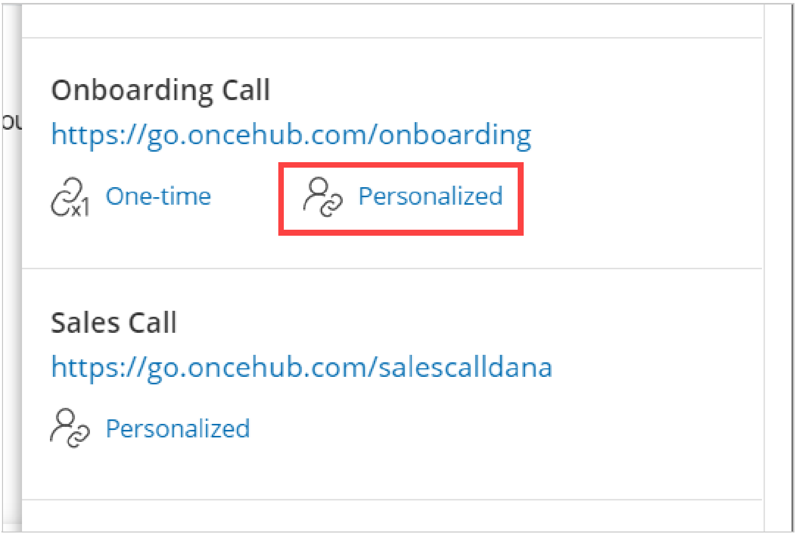


Figure 12: Generating a Personalized link

7. You will see the **Copied** confirmation when the link has been generated and copied to your clipboard (Figure 13).

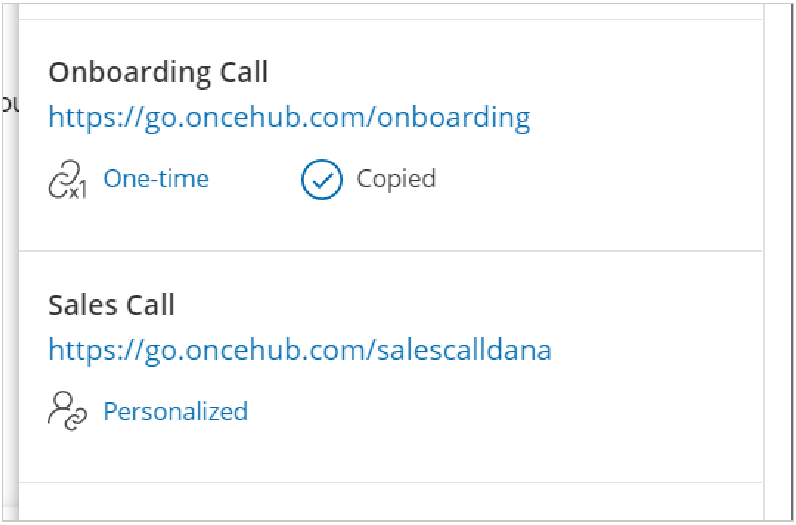


Figure 13: Personalized link copied

8. Create a customized html link by clicking the **Insert Link** button on the bottom email menu. (Figure 14).

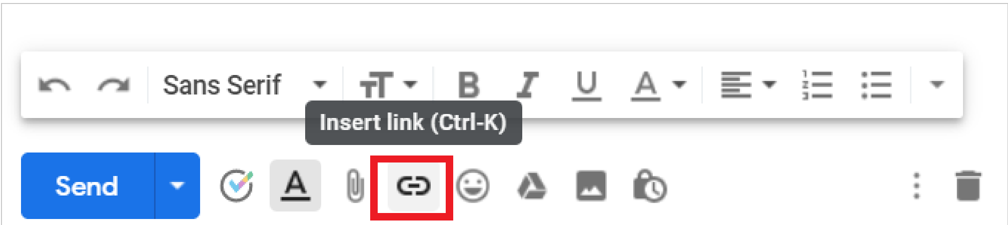


Figure 14: Insert Link button in Gmail.

9. A window will appear (Figure 15). Insert your booking link and the text you would like to display. Click OK.

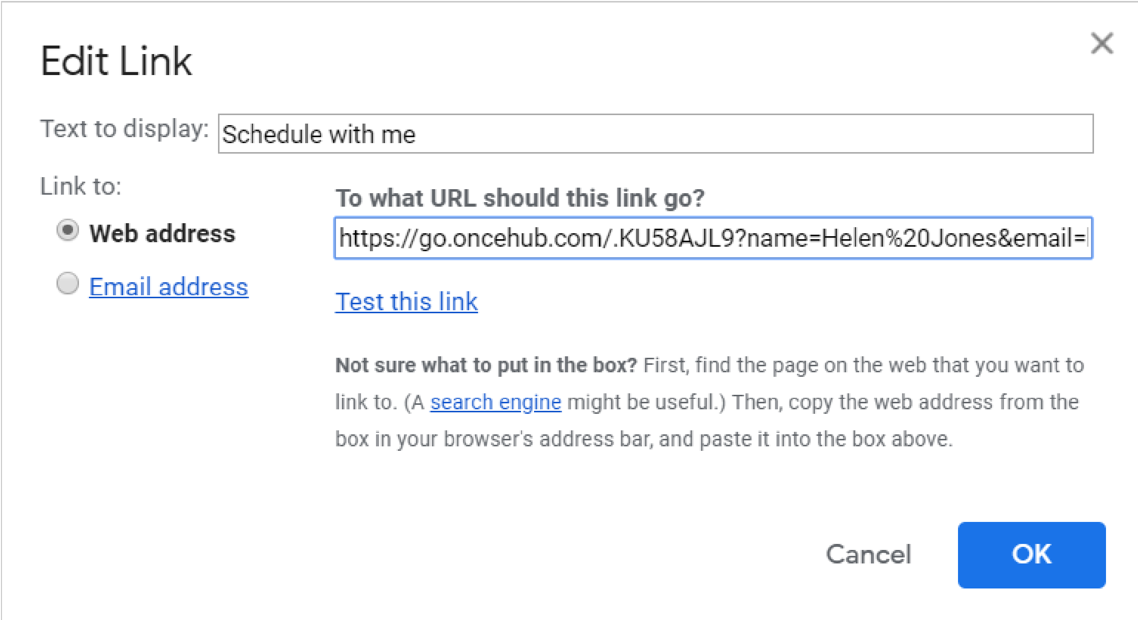


Figure 15: Insert Link window

10. Your booking link now will now appear as an html link. (Figure 16).

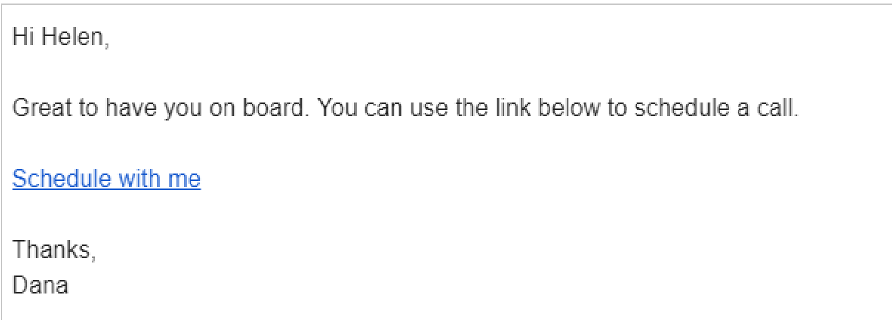


Figure 16: Html link in your email.

11. You can also paste your copied booking link directly into the body of your email without customizing it.

Sending one-time links using OnceHub for Gmail

Last Modified on Dec 13, 2019

The OnceHub for Gmail extension enables you to schedule meetings directly from your Gmail account. OnceHub for Gmail gives you instant access to all of your Booking page links without the need to change apps.

In this article, you'll learn about sending one-time links using OnceHub for Gmail.

Understanding one-time links

One-time links are good for one booking only, eliminating any chance of unwanted repeat bookings. A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page. One-time links can be personalized, allowing the Customer to pick a time and schedule without having to fill out the Booking form.

When you create a one-time link using OnceHub for Gmail, the Customer's name and email address is automatically taken from the email. When the Customer uses the Personalized link to schedule a meeting, they only need to choose a date and time, then confirm the meeting. The Booking form is skipped and they will not have to provide their name and email address.

One-time links are only available for Master pages using Rule-based assignment with Dynamic rules.

Note :

You can also send Personalized links using OnceHub for Gmail.

Learn more about sending Personalized links using OnceHub for Gmail

Requirements

To send one-time links using OnceHub for Gmail, you must:

- Install OnceHub for Gmail.
- Have a ScheduleOnce User license.
- Create a Master page using Rule-based assignment with Dynamic rules in your ScheduleOnce account.

Sending one-time links using OnceHub for Gmail

When replying to an email

1. Sign in to your Gmail account.
2. Open the email that would like to reply to.
3. Click **Reply**.
4. Click the OnceHub for Gmail icon (Figure 1).

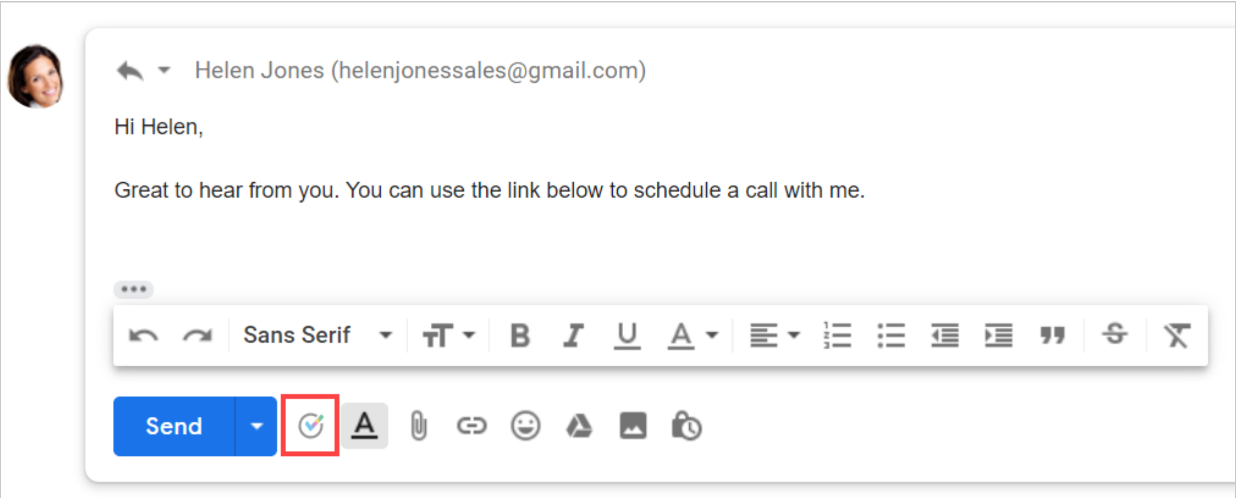


Figure 1: OnceHub for Gmail icon

5. The OnceHub for Gmail extension window will open (Figure 2).

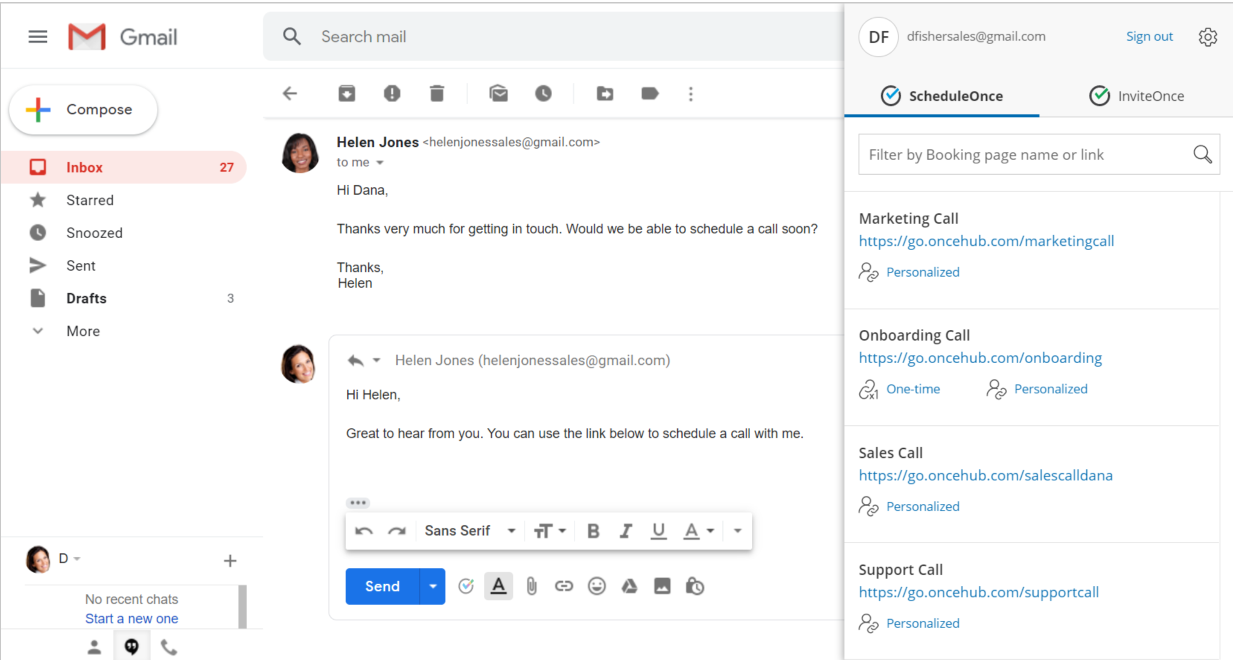


Figure 2: OnceHub for Gmail extension window

6. Click **One-time** next to the Master page you want to share (Figure 3).

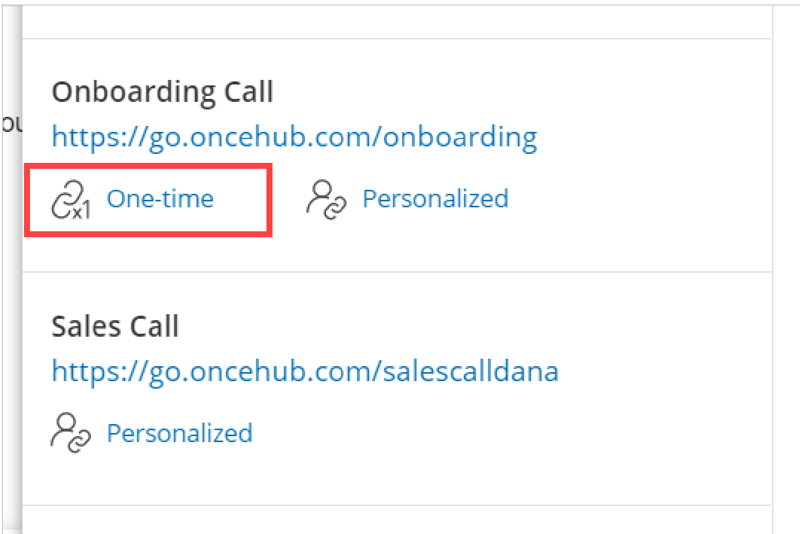
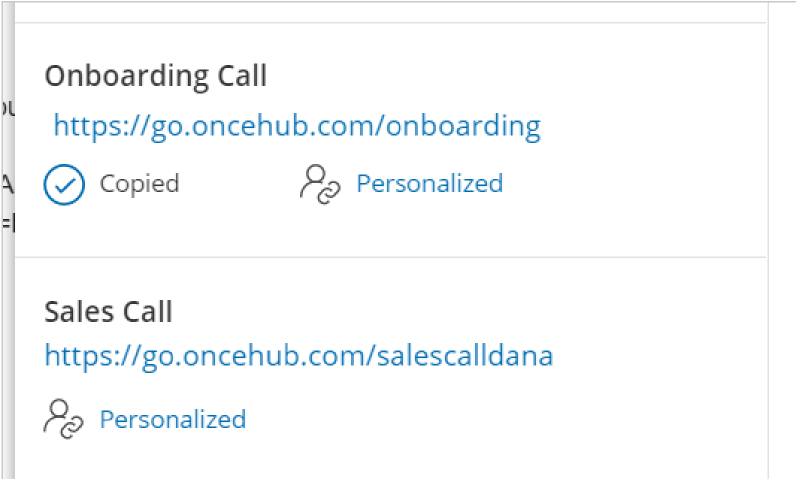


Figure 3: Generating a one-time link

7. You will see the **Copied** confirmation when the link has been generated and copied to your clipboard (Figure 4).



8. Paste the one-time link into your email (Figure 5).

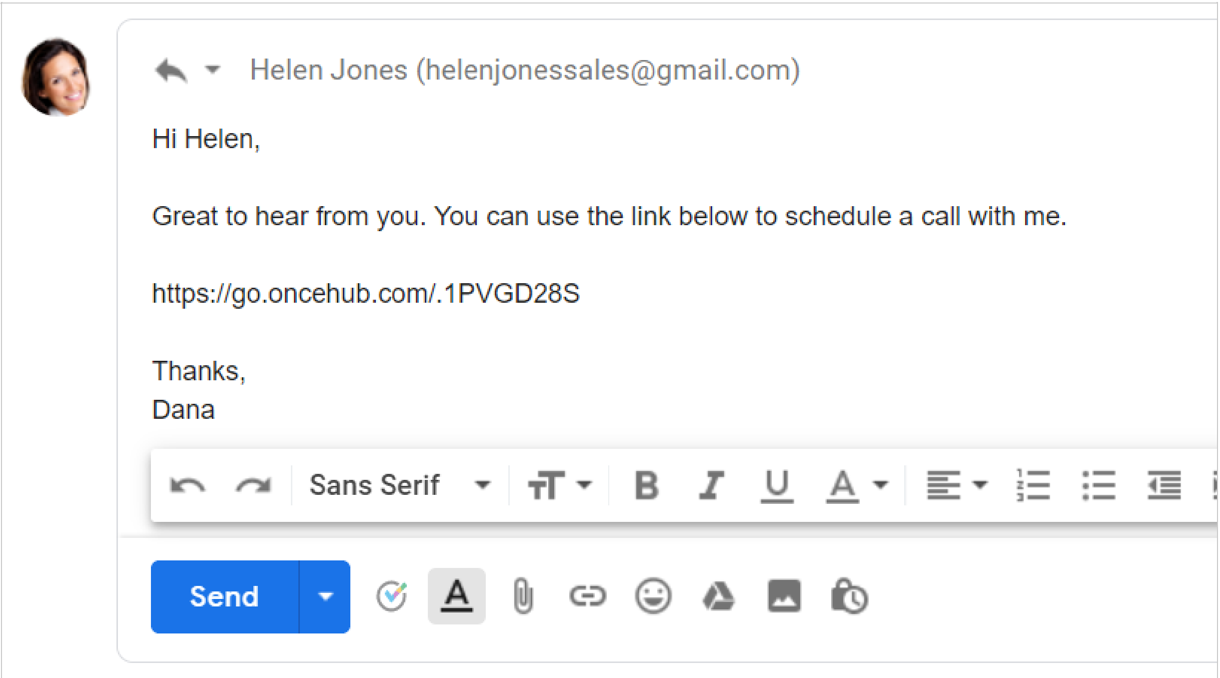


Figure 5: Pasting the one-time link into your email

9. To turn your booking link into a customized html link, click the Insert Link button on the bottom email menu. (Figure 6).

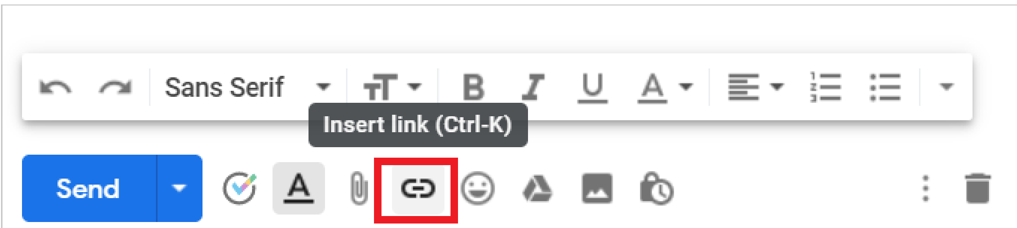


Figure 6: Insert Link button in Gmail.

10. A window will appear (Figure 7). Insert your booking link and the text you would like to display. Click OK.

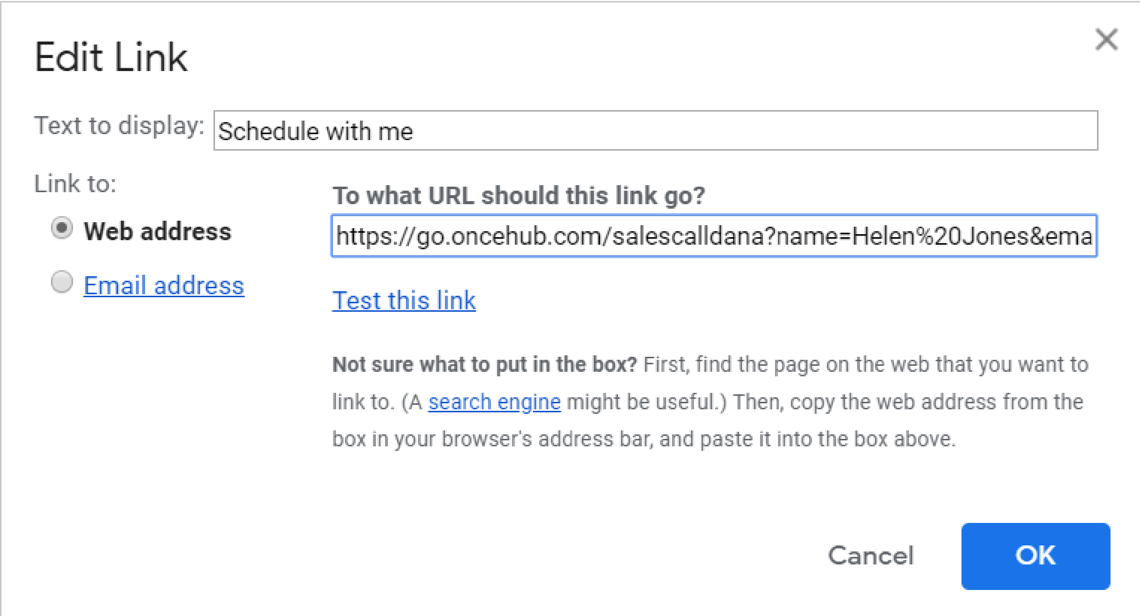


Figure 7: Insert Link window

11. Your booking link now will now appear as an html link. (Figure 8).

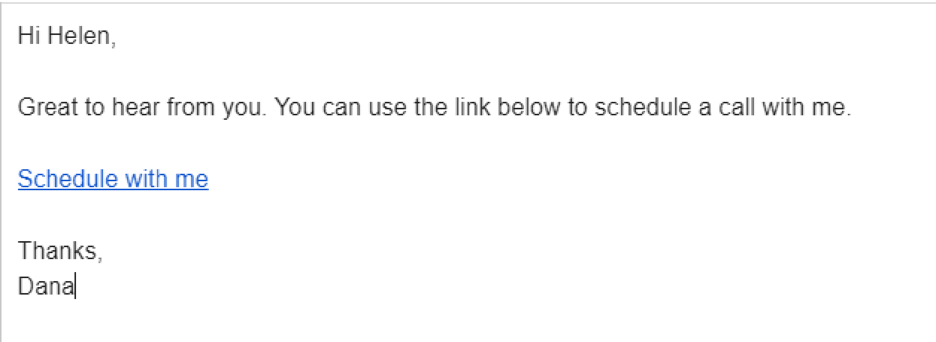


Figure 8: Html link in your email.

When composing a new email

1. Sign in to your Gmail account.
2. Click **Compose** to create a new email.
3. In the **To** field, enter the email address of the person you want to share your Booking page link with.

> **Note :**
>
> If you do not enter an email address, you will need to enter the **Customer name** and **Customer email** in the OnceHub for Gmail extension window when you generate a Personalized link.

4. Click the OnceHub for Gmail icon (Figure 9).

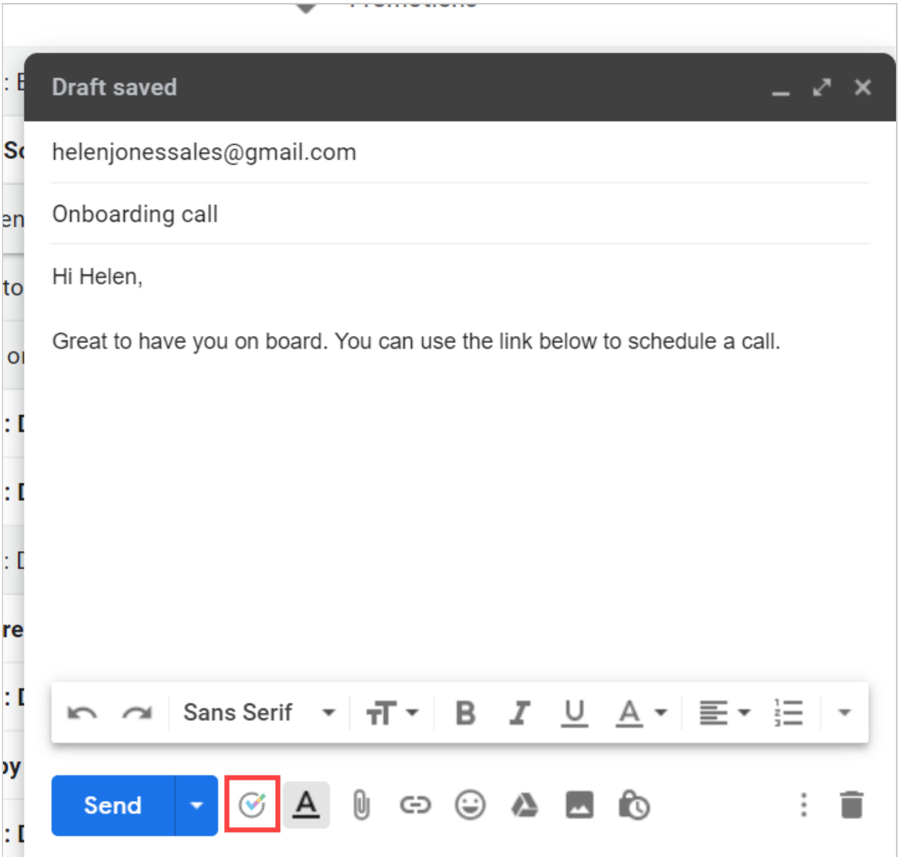


Figure 9: OnceHub for Gmail icon

5. The OnceHub for Gmail extension window will open (Figure 10).

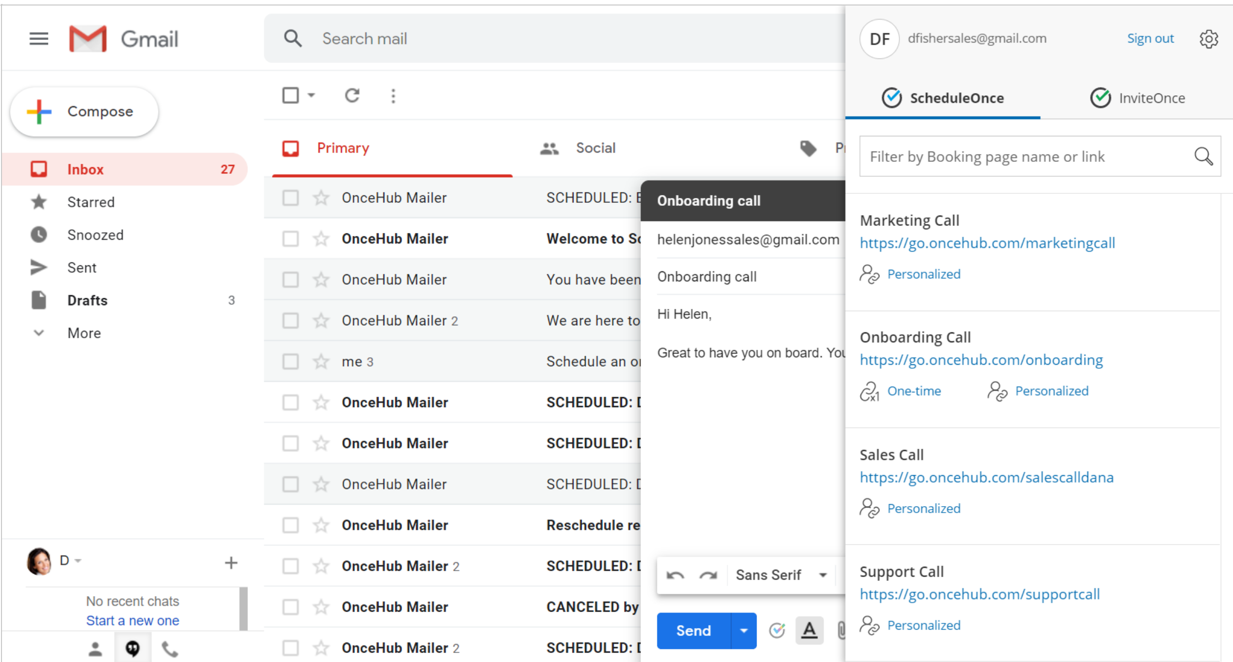


Figure 10: OnceHub for Gmail extension window

6. Click **Personalized** next to the Booking page you want to share (Figure 11).

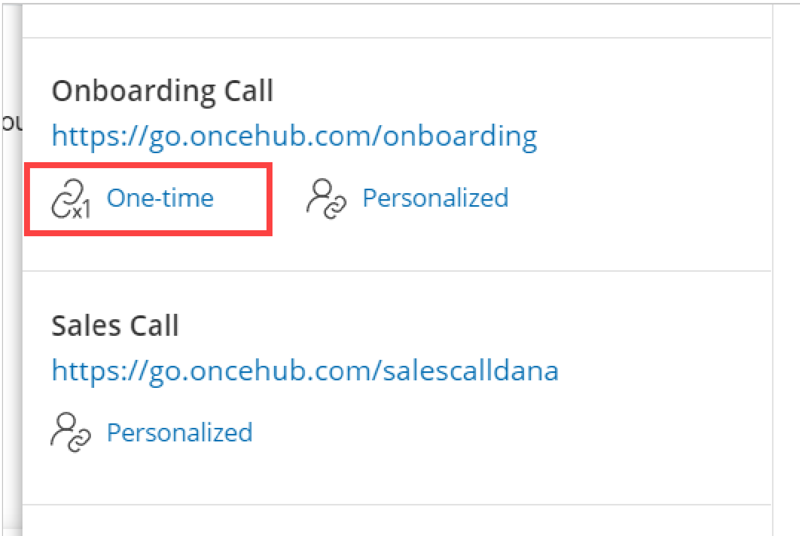
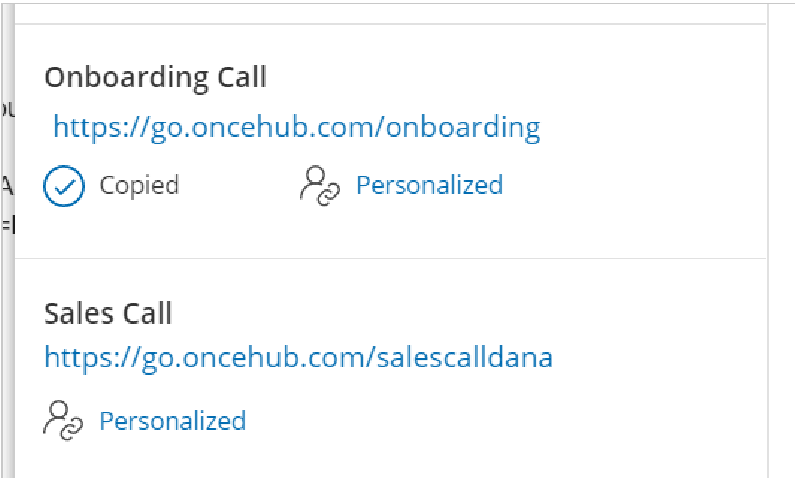


Figure 11: Generating a one-time link

7. You will see the **Copied** confirmation when the link has been generated and copied to your clipboard (Figure 12).



8. Paste the one-time link into your email (Figure 13).

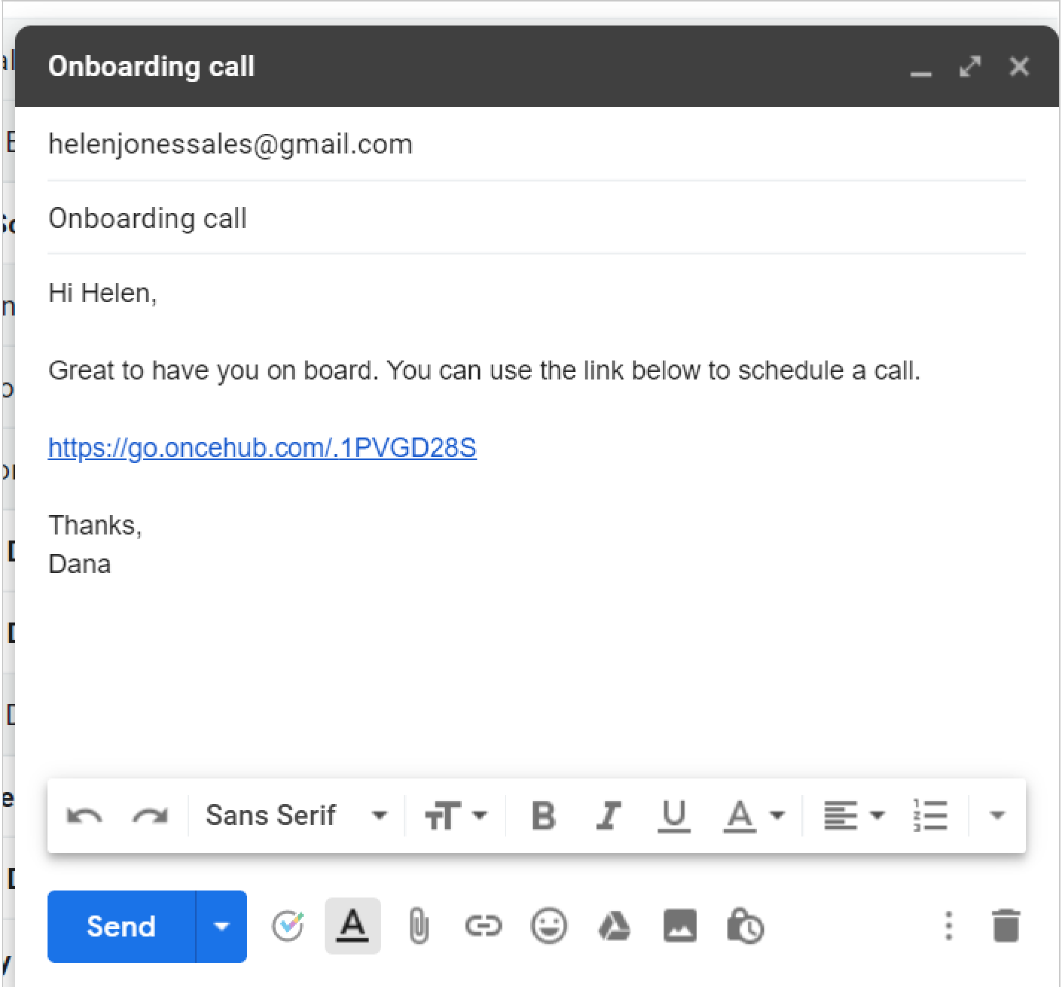


Figure 13: Pasting the one-time link into your email

9. To turn your booking link into a customized html link, click the Insert Link button on the bottom email menu. (Figure 14.)

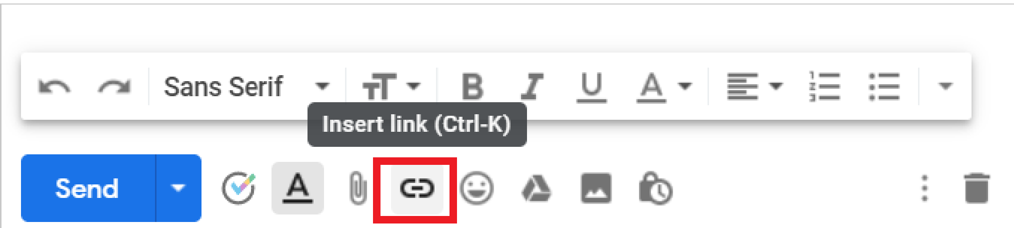


Figure 14: Insert Link button in Gmail.

10. A window will appear (Figure 15). Insert your booking link and the text you would like to display. Click OK.

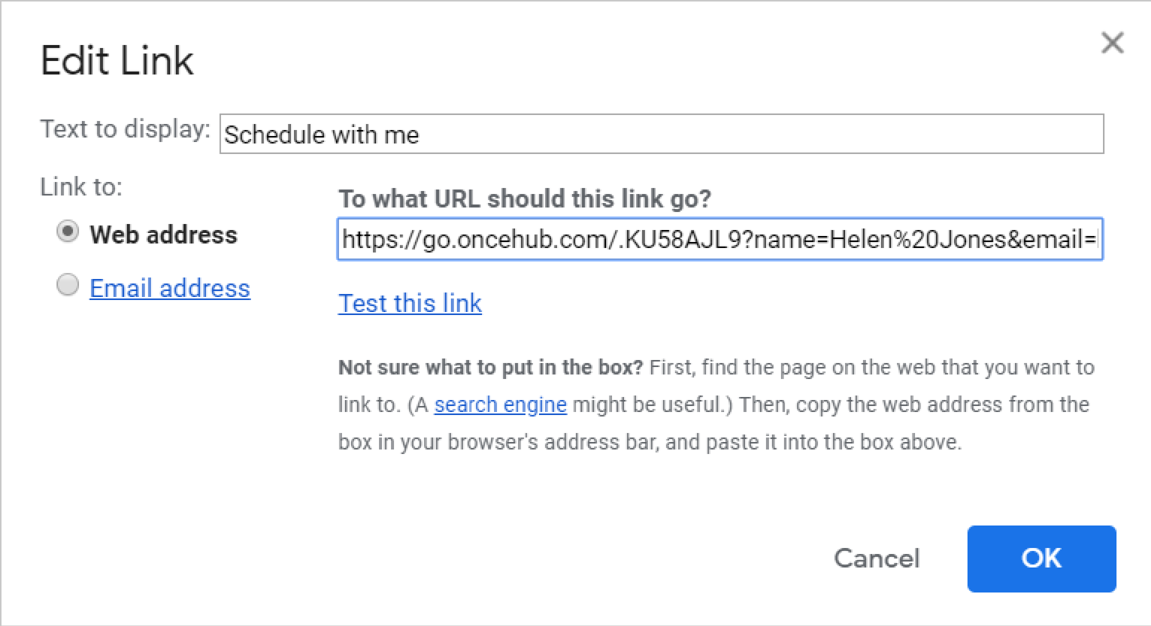
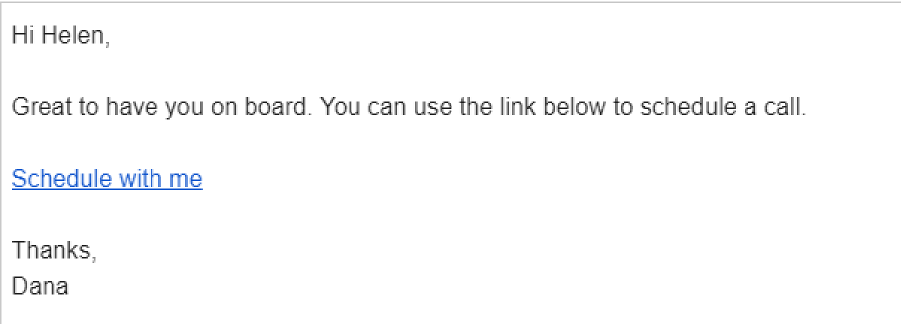


Figure 15: Insert Link window

11. Your booking link now will now appear as an html link. (Figure 16).


Hi Helen,

Great to have you on board. You can use the link below to schedule a call.

Schedule with me

Thanks,
Dana

Figure 16: Html link in your email.

Uninstalling OnceHub for Gmail

Last Modified on Dec 13, 2019

The OnceHub for Gmail extension enables you to schedule meetings directly from your Gmail account. OnceHub for Gmail gives you instant access to all of your Booking page links without the need to change apps.

In this article, you'll learn how to uninstall OnceHub for Gmail.

Uninstalling OnceHub for Gmail

From your Chrome browser settings

1. In your Chrome browser, click the three dots (action menu) in the top right corner (Figure 1).

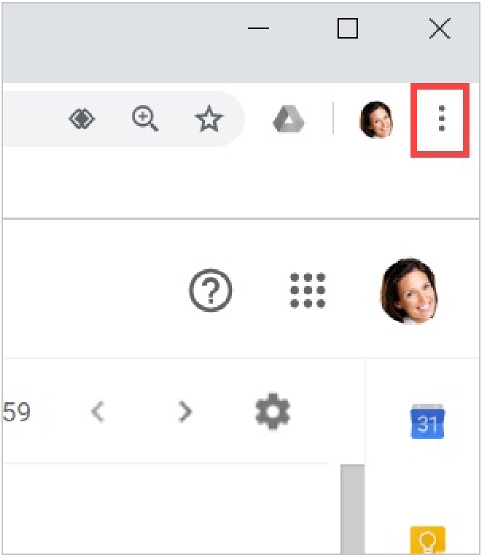


Figure 1: Chrome browser three dots (action menu)

2. In the drop-down menu, select **More tools -> Extensions**.
3. In the **OnceHub for Gmail** box, click **Remove** (Figure 2).

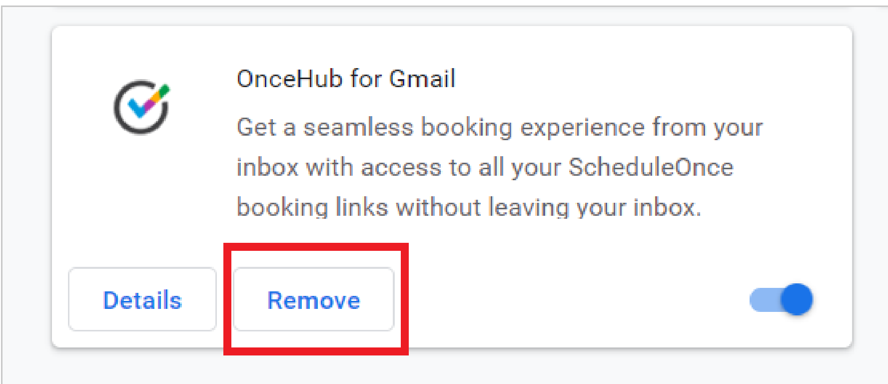


Figure 2: OnceHub for Gmail options in extensions menu.

4. Once you click **Remove**, you will see a confirmation screen (Figure 3). Click **Remove.**

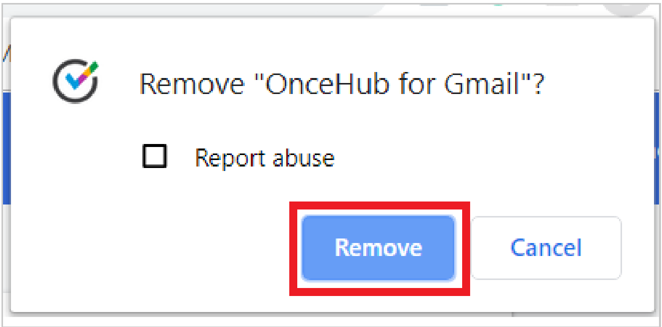


Figure 3: Removal confirmation.

From Chrome Web Store

1. Go to the Chrome Web Store listing for OnceHub for Gmail.
2. Click **Remove from Chrome** (Figure 4).

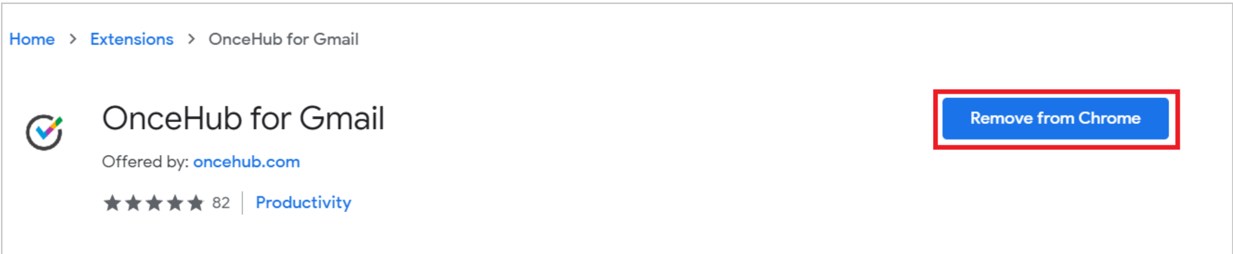


Figure 4: Removing OnceHub for Chrome in Chrome Web Store.

OnceHub for Gmail FAQs

Last Modified on Oct 12, 2022

In this article, you'll find answers to some of the most common questions related to OnceHub for Gmail.

How do I install the OnceHub for Gmail extension?

1. Go to the Chrome Web Store listing for OnceHub for Gmail.
2. Click **Add to Chrome** (Figure 1).

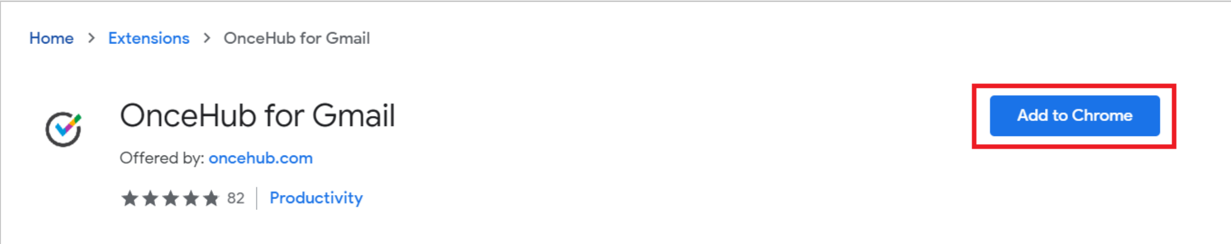


Figure 1: Add to Chrome

3. The installation permissions pop-up will appear.
4. Click **Add Extension** (Figure 2).

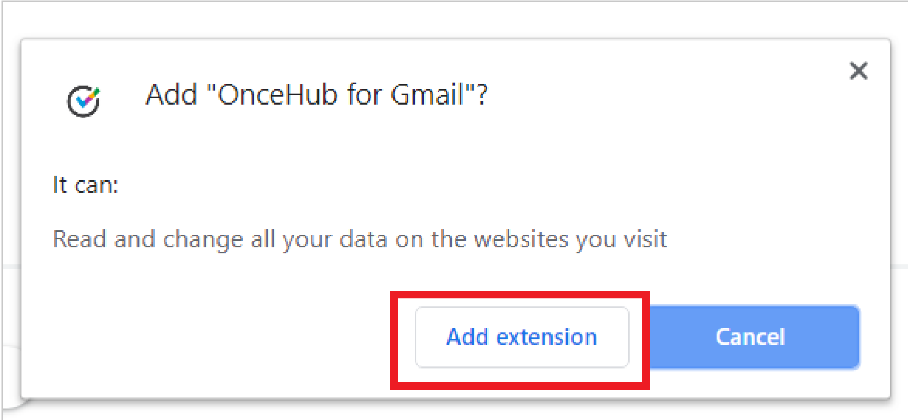


Figure 2: Add to Chrome confirmation

5. Once installed, you will see the OnceHub for Gmail confirmation screen.

Learn more about installing OnceHub for Gmail

How do I open the OnceHub for Gmail extension?

Once you've installed OnceHub for Gmail, you can open the extension in the email you're composing by clicking the OnceHub for Gmail icon (Figure 3).

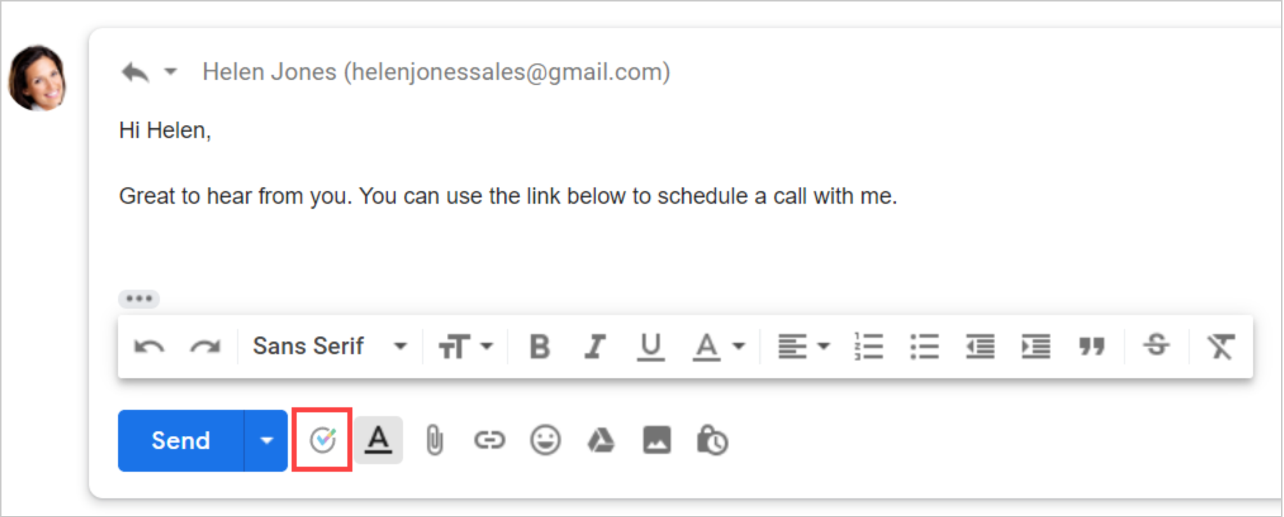


Figure 3: OnceHub for Gmail icon

Can I search for my Booking pages in OnceHub for Gmail?

Yes, you can filter the list of Booking pages by Booking page name or link by using the search box (Figure 4).

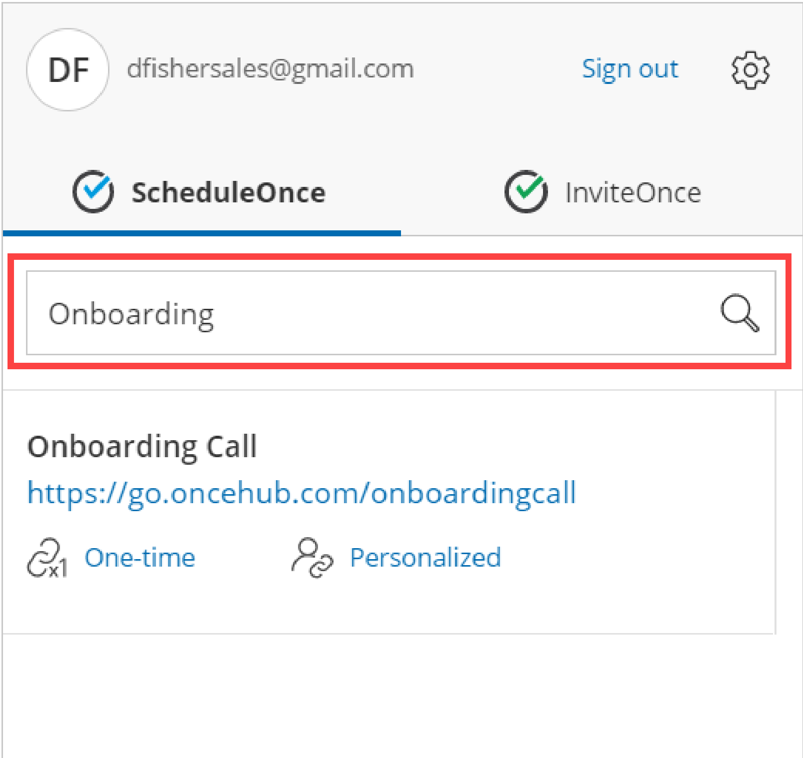


Figure 4: Filter by Booking page name or link

My Chrome extension isn't working

After installing, you need to refresh your Gmail page before the OnceHub for Gmail icon appears. If it still doesn't appear, close and re-open Chrome.

Why can't I see my Booking pages in OnceHub for Gmail?

If you can't see any Booking pages in the OnceHub for Gmail extension, you may need to sign in to your OnceHub account.

If you not created any Booking pages in your account, you will need to create a Booking page before you can use it in OnceHub for Gmail.

Why can't I use my Booking page?

If you can't use a Booking page in OnceHub for Gmail, there may be a calendar connection error in your account. Sign in to your OnceHub Account. Then, in the left sidebar select **My Profile** (Profile image or initials icon on the top right corner) **→ Profile settings → Calendar connection** and click the **Reconnect your calendar** button.

Learn more about calendar connection

What happens if someone is CC'd on the email I want to create a Personalized booking link for?

In this case, the Personalized link will be automatically generated for the email address in the "To" field. You will not be asked to confirm the details before it's copied to your clipboard.

Do any other browsers support the OnceHub for Gmail extension?

There are various browsers that are compatible with Google Chrome and support Chrome extensions. Compatible browsers include: Brave, Opera, Vivaldi, Yandex and Slimjet.

How do I uninstall OnceHub for Gmail?

1. In your Chrome browser, click the three dots (action menu) in the top right corner (Figure 5).

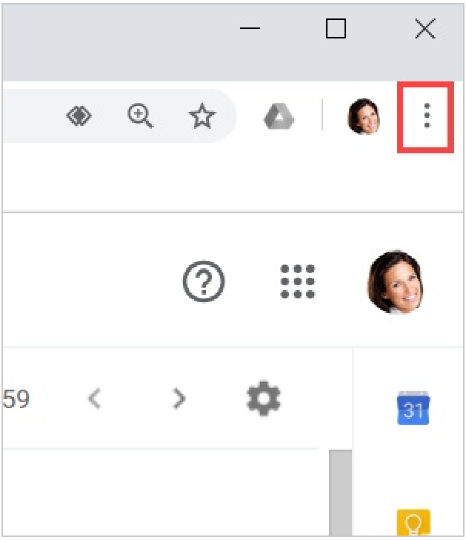


Figure 5: Chrome browser three dots (action menu)

2. In the drop-down menu, select **More tools → Extensions**.
3. In the **OnceHub for Gmail** box, click **Remove** (Figure 6).

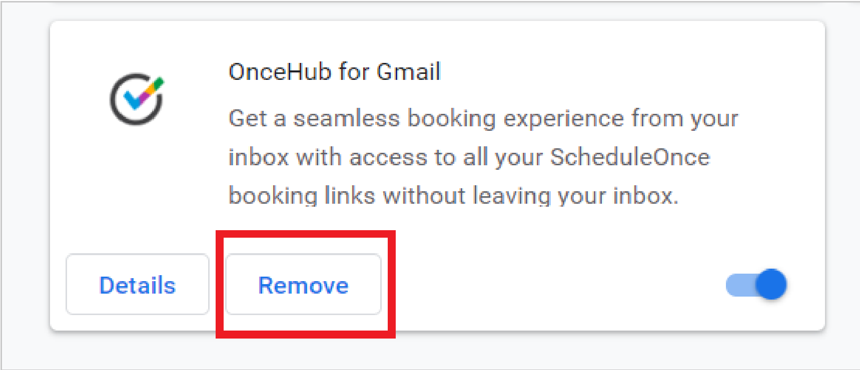


Figure 6: OnceHub for Gmail options in extensions menu.

4. Once you click **Remove**, you will see a confirmation screen (Figure 7). Click **Remove.**

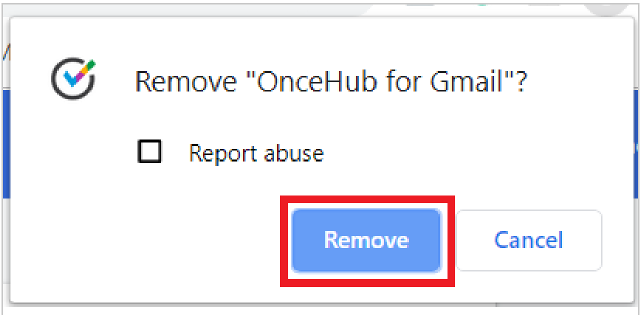


Figure 7: Removal confirmation.

Website embed: Business scenarios

Last Modified on Jun 5, 2023

You can use the Website embed publishing option to embed the OnceHub scheduling pane into any page on your website. This allows your Customers to schedule without leaving your website.

The Website embed can also be integrated with your lead generation process, letting you offer scheduling to every website visitor. If you want to offer scheduling to specific prospects such as your top prospects, you can use Website embed in conjunction with our web form integration feature.

In this article, you'll learn about different business scenarios for the Website embed publishing option.

Using Website embed to engage any website visitor

You can embed your Booking page or Master page into any website page. The embedded scheduling pane acts as a call-to-action that allows any website visitor to schedule with you, without ever leaving your website.

Learn more about the Website embed

Using Website embed to collect booking data

You can collect booking confirmation data from an embedded Booking page by adding a JavaScript function alongside the OnceHub embed code in your website. This feature can be used in business scenarios such as creating a custom confirmation page, enabling client-side integrations, or enriching Customer data profiles.

Learn more about collecting data from embedded Booking pages

Using Website embed with Web form integration

You can use Website embed with web form integration to offer scheduling to leads right after they submit a lead generation form.

You have the option to offer scheduling only to your top leads, based on their web form submission, or to every prospect who fills out your web form. Prospects that have already provided their details in your web form will not have to do so again in the Booking form. Customer data is passed from your web form directly to OnceHub.

There are two options for passing data to OnceHub when you integrate scheduling with your web form.

Passing data via URL parameters

When you pass data via URL parameters, web form data is passed to the OnceHub Website embed via the URL. You can choose to prepopulate or skip the Booking form.

If you are using a **third party web form** such as Wufoo, the Booking form data you pass via the URL needs to match the supported OnceHub URL parameters. This makes sure that the right information is extracted from the URL and placed in the correct Booking form fields.

Passing data via CRM record IDs

When you pass data via CRM record IDs, the CRM record ID is passed to OnceHub via the URL. You can choose to prepopulate or skip the Booking form in order to provide a quicker booking experience.

- If you're using **Infusionsoft**, you can use the Infusionsoft Contact ID to integrate with Infusionsoft web forms or personalize the booking process on landing pages.

- If you're using **Salesforce**, you can use the Salesforce Record ID to personalize the booking process on landing pages.

> **Note:**
>
> The embedded interface is an HTML 5 app and is not supported on old browsers, including Microsoft Internet Explorer.
>
> Learn more about our System requirements

Website embed

Last Modified on Oct 12, 2022

Your Customers can schedule without ever leaving your website if you use our Website embed publishing option. This creates an effective call to action that motivates your leads and prospects to schedule with you. The embedded pane fits into any web page and doesn't show any OnceHub branding.

In this article, you'll learn about the Website embed publishing option.

When should I use Website embed?

Embedding a scheduling pane is an effective solution for several business flows, including:

- Offering scheduling to any site visitor.
- Offering scheduling only to prospects who fill out your web form.
- Offering scheduling only to top prospects based on specific criteria.

Learn more about Website embed business scenarios

Requirements

To embed a scheduling pane on your website, you must be a webmaster for your company's website, or have direct access to your company website's code.

Embedding your page onto your website

1. Go to **Booking pages** in the bar on the left → **Booking page → Share & Publish**.
2. Select the **Website embed** tab (Figure 1).

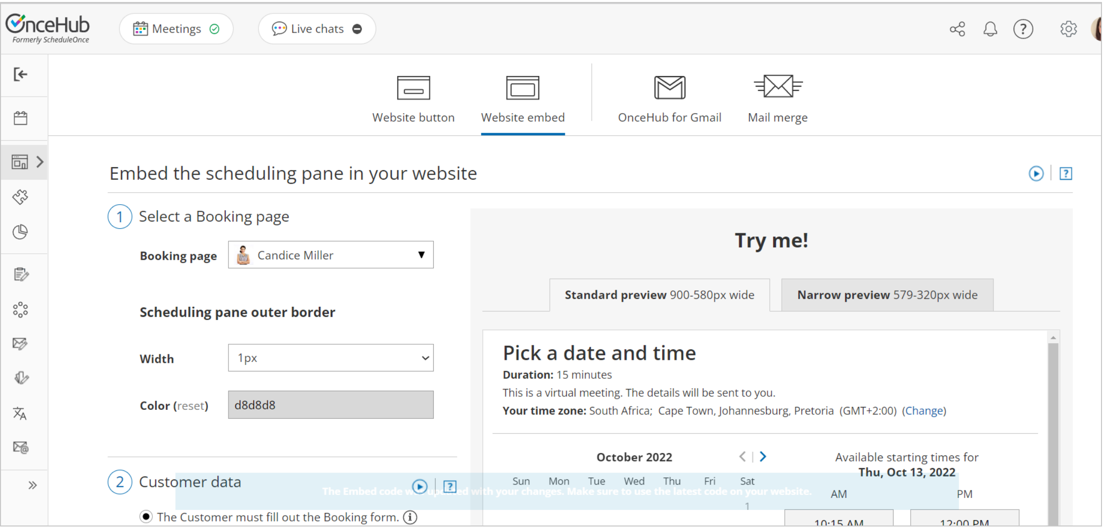


Figure 1: Website embed

3. Select the Booking page or Master page you want to embed on your website (Figure 1).
4. Use the **Width** drop-down menu to select the width of the Scheduling pane outer border.
5. Use the **Color** option to change the color of the border.
6. In the **Customer data** step (Figure 2), select to have Customers fill out the Booking form, or select a Web form integration option.
   If you select a web form integration option, you can select to **Skip the Booking form** or **Prepopulate the Booking form**.
7. Click the **Copy code** button to the copy the code to your clipboard.
8. Paste the code into the relevant location on your website.

Note:

If you change any Website embed settings, you must replace the Website embed code that you previously added to your web pages.

However, you can edit Booking page settings, Master page settings, and the theme design without updating the code you added to your web pages.

Customizing the embedded scheduling pane

If you have a basic understanding of CSS, you can apply advanced customization (embed frame height and width) on top of the core settings. The height can be fixed or responsive.

- **Fixed height**: This is the default option. The height is set to 550 pixels. You can change the default height to any number you want by changing the height property in the code.
- **Responsive height**: This will automatically adjust the height to the frame content. To use this method, you must delete the height property in the code.

Learn more about customization

The embedded frame layout when width is between 900–541 pixels

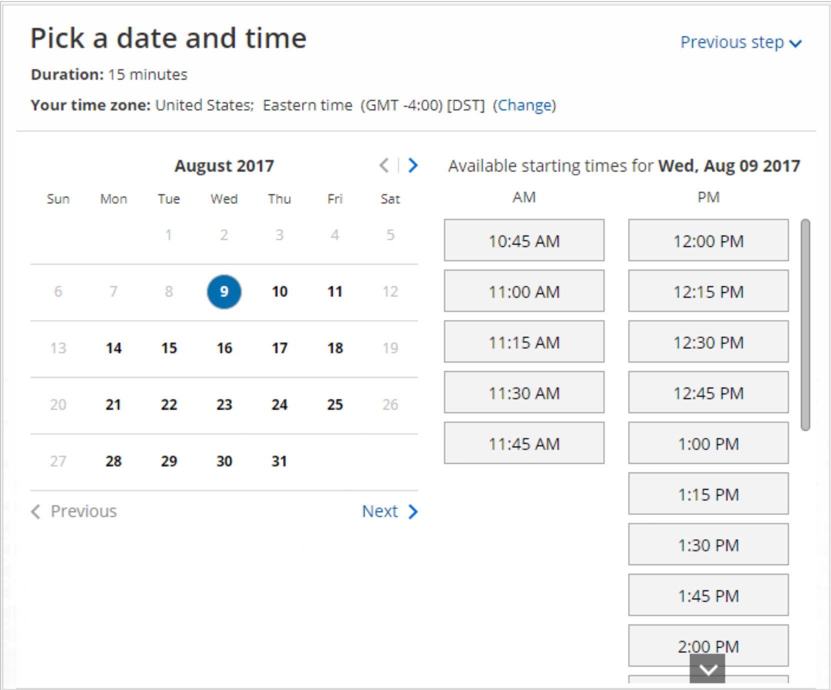


Figure 4: Embedded frame layout when width is between 900–541 pixels

The embedded frame layout when width is between 540–320 pixels

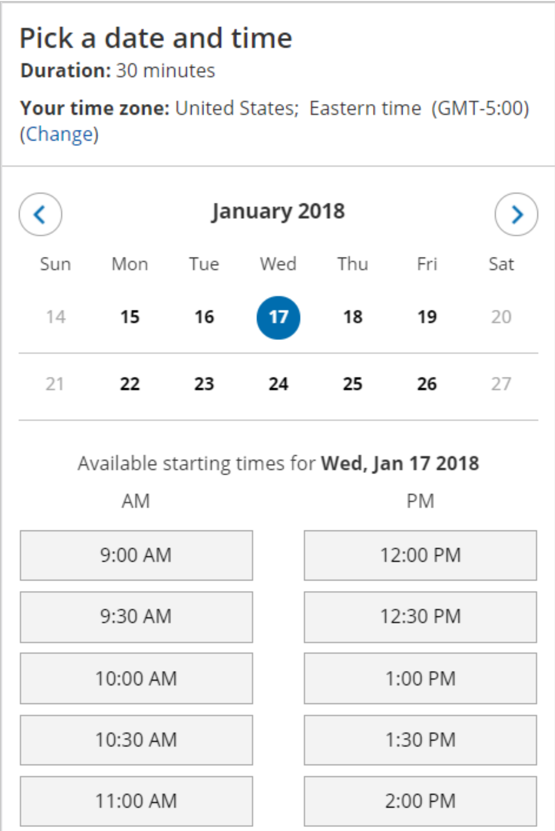


Figure 5: Embedded frame layout when width is between 540–320 pixels

Restrictions for Website embed

- The embedded interface is a HTML 5 app and is not supported on old browsers, including Microsoft Internet Explorer. Learn more about our System requirements
- The embed code contains JavaScript, which might be blocked by some low-cost web hosting providers. In this case, you will not be able to embed a booking page on this website.

Website embed customization

Last Modified on Oct 12, 2022

The Website embed publishing option can be placed on any of your web pages as a call-to-action for your Customers to schedule with you. The design and layout of the embedded scheduling pane can be customized to ensure it fits perfectly on your website. Many embed settings can be customized on the **Share & Publish** page before you copy the code.

For more advanced customization, you can modify properties directly in the code. You can also collect booking data from an embedded Booking page for client-side API use cases such as creating a custom confirmation page, enabling client-side integrations, or enriching Customer data profiles.

In this article, you'll learn about customizing the Website embed publishing option.

Note:

This article describes customizing the size of the Website embed. The design of the scheduling process itself is determined by the Theme applied on the Overview section of the embedded Booking page or Master page.

Requirements

To embed a scheduling pane on your website, you must be a webmaster for your company's website, or have direct access to your company website's code.

Customization steps

1. Go to **Booking pages** in the bar on the left → **Booking page → Share & Publish**.
2. Select the **Website embed** tab (Figure 1).

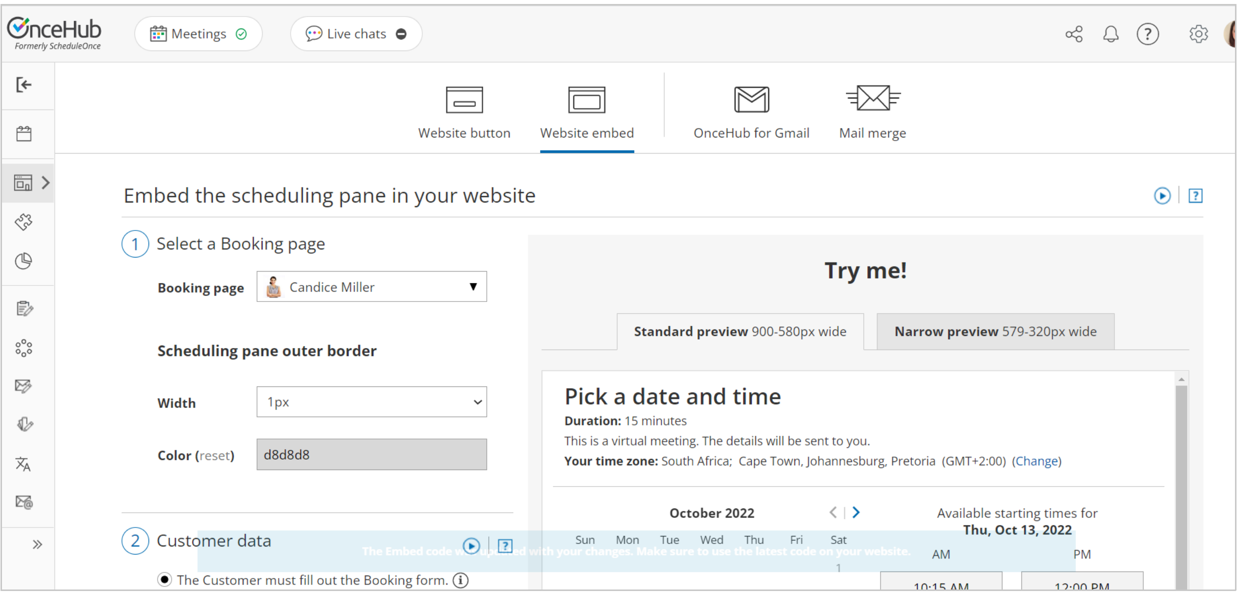


Figure 1: Website button tab

3. Select the Booking page or Master page you want to embed on your website.
4. Use the **Width** drop-down menu to select the width of the Scheduling pane outer border.
5. Use the **Color** option to change the color of the border.
6. In the **Customer data** step (Figure 2), select to have Customers fill out the Booking form, or select a web form integration option. If you select a web form integration option, you can select to **Skip the Booking form** or

Prepopulate the Booking form.

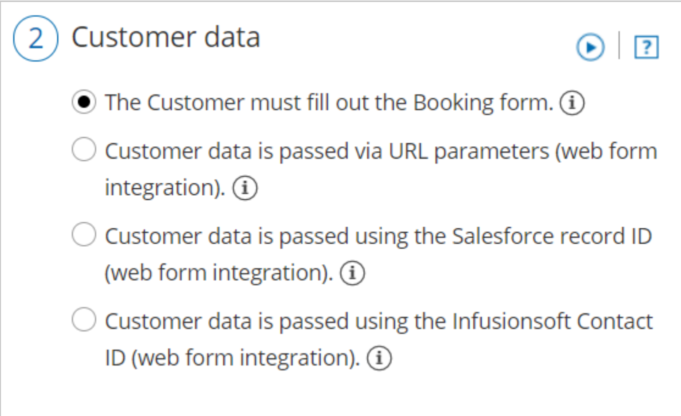


Figure 2: Customer data step

7. Click the **Copy** button to the copy the code to your clipboard.
8. Paste the code into the relevant location on your website.

After you've pasted the code, you can follow the steps below to modify the embed height and embed width.

Embed height

- **Fixed height**: This is the default option. The height is set to 550 pixels. You can change the default height to any number you want by changing the height property in the code. When the content is longer, a vertical scroll bar will be added automatically.
  When the element containing the embed on your website has a height setting, we highly recommend setting the OnceHub height attribute to the same number of pixels as the height setting.
- **Responsive height**: This will automatically adjust the height to the frame content. To use this method you must delete the height property in the code. In this case the height will adapt to the content of each step in the scheduling process.

```
<!-- ScheduleOnce embed START -->

<div id="SOIDIV_BookingPageLink" data-so-page="BookingPageLink" data-height="550" data-style="border: 1px solid #d8d8d8; min-width: 290px; max-width: 900px;" data-psz="00"></div>

<script type="text/javascript" src="https://cdn.oncehub.com/mergedjs/so.js"></script>

<!-- ScheduleOnce embed END -->
```

Embed height recommendations

- For most cases, the default height is the recommended option.
- Modify the Embed height if the content of the steps in your scheduling process is consistently shorter or longer than the default height specified.
- Modify the Embed height to match the height set for the element containing the embed.
- Remove the Embed height attribute completely if you want your Customers to scroll using the external browser scroll bar, rather than the internal embed scroll bar.

Embed width

The embedded frame width is responsive in the 290–900 pixels range. It automatically adjusts for desktop and mobile devices. Because the embed is fully responsive, it will adjust to the maximum width of its wrapping container element (up to 900 pixels wide).

To ensure the embed remains responsive, we recommend that you don't change the width of the code. If you want to limit the responsiveness of the embed, we recommend wrapping the embed with another element on your page. This can be done by adding a wrapping container around the code:

```
<div style="width: 50%">

<!-- ScheduleOnce embed START -->

<div id="SOIDIV_BookingPageLink" data-so-page="BookingPageLink" data-height="550" data-style="border: 1px solid #d8d8d8; min-width: 290px; max-width: 900px;" data-psz="00"></div>

<script type="text/javascript" src="https://cdn.oncehub.com/mergedjs/so.js"></script>

<!-- ScheduleOnce embed END -->

</div>
```

Add personalized field parameters to the embed

If you've identified your website visitor through marketing campaign tracking, a signed-in customer portal, or any other method, you may already have their details, such as name, email, company, and any other custom data you require from them. In this case, you can autopopulate these fields from a data source on your end (requires additional development) so they don't have to fill out a form with all necessary details you require for that scheduled meeting.

You can send these required field parameters to your embed if you've added the attribute **data-so-qry-prm** to your embed code, along with all relevant fields and their values.

Example of added attribute and field parameters:

```
data-so-qry-prm="name=ADD%20NAME&email=ADDEMAIL%40DOMAIN.COM&mycustomfield=12345"
```

In the above case, the parameters are specifying a name, email, and a custom field. For instance, the custom field could be a record ID, fetched through a cookie or other communication with your database.

If you'd prefer one of the fields, such as a record ID, be hidden from the Customer in their booking notifications, you can configure it as a hidden Custom field.

Learn more about the syntax for added parameters

Website button: Business scenarios

Last Modified on Jun 5, 2023

The OnceHub Website button publishing option can be added to any page on your website, allowing your Customers to schedule without leaving your website. This scheduling method creates an effective call to action, motivating your leads and prospects to schedule with you. The button text and design can be customized and the scheduling lightbox is fully brandless.

The Website button can also be integrated with your lead generation process, letting you offer scheduling to every website visitor. If you want to offer scheduling to specific prospects, such as your top prospects, you can use the Website button in conjunction with our Web form integration feature.

In this article, you'll learn about different business scenarios for the Website button publishing option.

Using the Website button to engage any website visitor

You can embed a Website button in any website page. When the Customer clicks the the button, they will be taken directly to your Booking page or Master page. The Website button acts as a call-to-action that allows any website visitor to schedule with you without ever leaving your website.

Learn more about the Website button

Using the Website button with Web form integration

You can use a Website button with Web form integration to offer scheduling to leads right after they submit a lead generation form.

You have the option to offer scheduling only to your top leads, based on their web form submission, or to every prospect who fills out your web form. Prospects that have already provided their details in your web form will not have to do so again in the Booking form. Customer data is passed from your web form directly to OnceHub.

There are two options for passing data to OnceHub when you integrate scheduling with your web form:

Passing data via URL parameters

When you pass data via URL parameters, web form data is passed to OnceHub via the URL. You can choose to prepopulate or skip the Booking form.

If you are using a third-party web form, such as Wufoo, the Booking form data you pass via the URL needs to match the supported OnceHub URL parameters. This will ensure the right information is extracted from the URL and placed in the correct Booking form fields.

Passed data via CRM record IDs

When you pass data via CRM record IDs, the CRM record ID is passed to OnceHub via the URL. You can choose to prepopulate or skip the Booking form.

- If you are using **Infusionsoft**, you can use the Infusionsoft Contact ID to integrate with Infusionsoft Web forms or personalize the booking process on landing pages.
- If you are using **Salesforce**, you can use the Salesforce Record ID to personalize the booking process on landing pages.

Note:

The button is a HTML 5 app and is not supported on old browsers, including Microsoft Internet Explorer.

Learn more about our System requirements

Website button

Last Modified on Oct 13, 2022

The Website button publishing option can be added to any page on your website, allowing your Customers to schedule without leaving your website. This scheduling method creates an effective call to action, motivating your leads and prospects to schedule with you. The button text and design can be customized and the scheduling lightbox is fully brandless.

In this article, you'll learn about the Website button publishing option.

When should I use a Website button?

Embedding a scheduling pane is an effective solution for several business flows, including:

- Offering scheduling to any site visitor.
- Offering scheduling only to prospects who fill out your web form.
- Offering scheduling only to top prospects based on specific criteria.

Learn more about using the Website button business scenarios

Requirements

To embed a scheduling pane on your website, you must be a webmaster for your company's website, or have direct access to your company website’s code.

Adding a Website button to your website

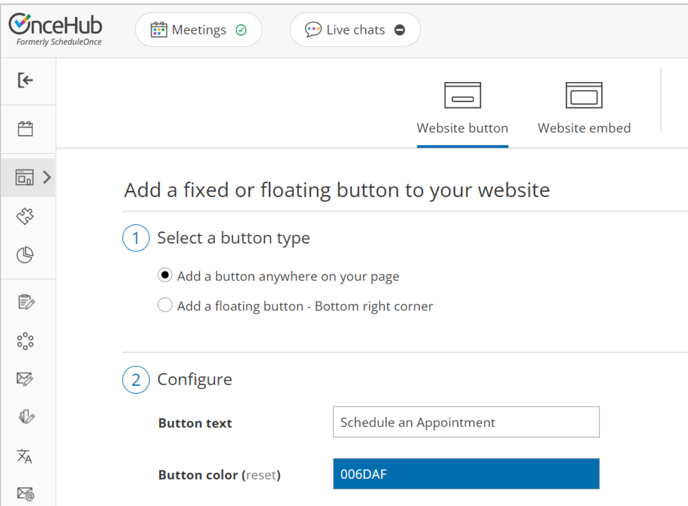
1. Go to **Booking pages** in the bar on the left → **Booking page → Share & Publish**.
2. Select the **Website button** tab (Figure 1).
3. 

Figure 1: Share icon in top navigation menu

4. In the **Select a button type** step, there are two types of buttons to choose from (Figure 2).
5.
    - **Add a button anywhere on your page**: The width is determined by the button text. The height is 40px. This button is a standard HTML button and can be positioned anywhere on the page.
    - **Add a floating button**: The width is determined by the button text. This button is a standard HTML button with a fixed position. When you paste the code in an unrestricted location, it should show in the bottom right corner of your web page.

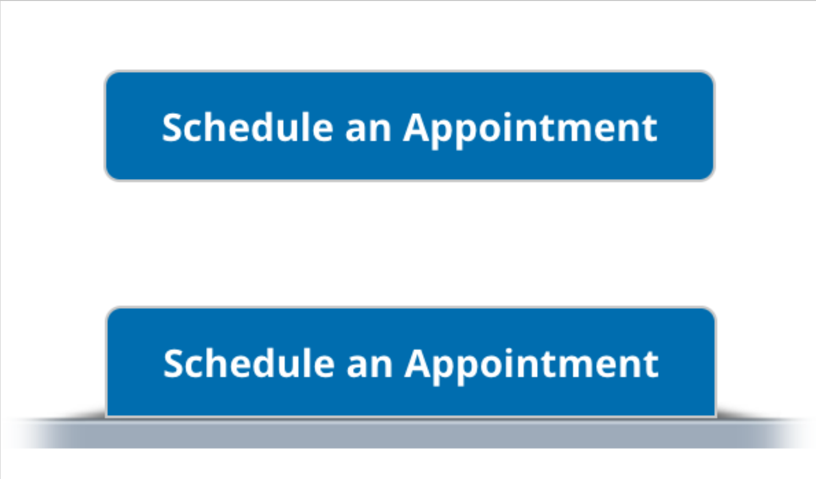


Figure 3: Standard button and floating button

6. In the **Configure** step, you can edit the **Button text** and select the **Button color**.
7. In the **Select a Booking page** step, select the Booking page or Master page you want to create the website button for.
8. In the **Customer data** step (Figure 3), select to have Customers fill out the Booking form, or select a web form integration option. If you select a web form integration option, you can select to **Skip the Booking form** or **Prepopulate the Booking form**.

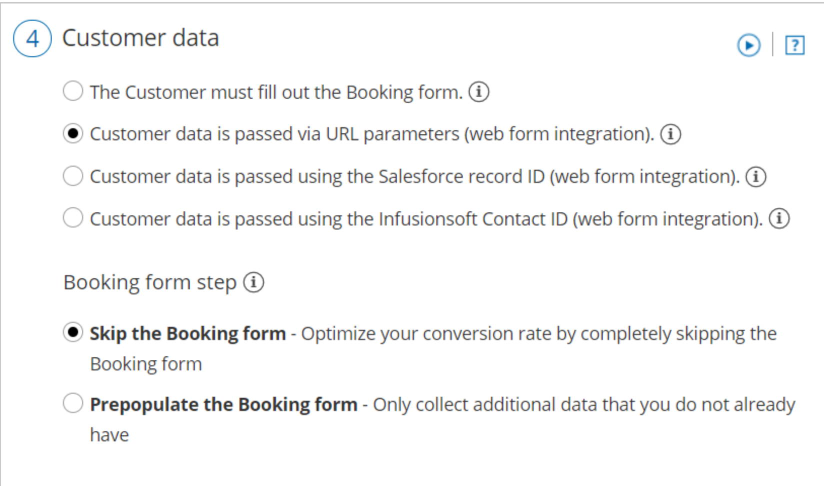


Figure 4: Customer data step

9. From the **Button code** step, choose the **Display type**. There are two types of display:

- **Open in a lightbox:** The Booking page will be displayed in a lightbox on top of your web page.
- **Open in a new page:** The Booking page will be displayed in a new browser tab.

> **Note:**
>
> If you change any Website button settings, you must replace the Website button code you added to your web pages.
>
> However, you can always edit the Booking page settings, Master page settings, and the theme design without updating the code on your web pages.

10. Click the **Copy code** button to the copy the code to your clipboard.
11. Paste into your website in the following locations, depending on the button type you selected:

- **The standard website button**: Copy and paste the button code into your web page where you want the button to show.
- **The floating button**: Copy and paste the button code into your web page just before the closing </body> tag.

If you have some basic understanding of CSS, you can apply further customization (button design and lightbox height) on top of the core settings.

OnceHub handles the lightbox height in one of two ways:

- **Fixed height**: This is the default option and height is set to 580 pixels. You can change the default height to any number you want by changing the height property in the code.
- **Responsive height**: This will automatically adjust the height to the frame content. To use this method, you must delete the height property in the code.

Learn more about customizing the Website button

Restrictions for the Website button

- The button and lightbox are an HTML 5 app and are not supported on old browsers, including Microsoft Internet Explorer. Learn more about our System requirements
- The button code contains JavaScript, which might be blocked by some low-cost web hosting providers. In this case, you will not be able to embed a booking page on this website.

Website button customization

Last Modified on Oct 13, 2022

The Website button publishing options can be added to any page on your website, allowing your Customers to schedule without leaving your website. This scheduling method creates an effective call to action, motivating your leads and prospects to schedule with you.

The code provided by OnceHub creates two elements on your page: the button and the lightbox that shows the scheduling pane. The design and layout of the call-to-action button and the scheduling lightbox can be customized. Many button settings can be customized on the **Share & Publish** page. For more customization, you can add CSS properties to the code.

In this article, you'll learn about customizing the Website button publishing option.

Note:

This article describes customizing button design and size of the Website button. The design of the scheduling process itself is determined by the Theme applied on the Overview section of the embedded Booking page or Master page.

Requirements

To embed a scheduling pane on your website, you must be a webmaster for your company's website, or have direct access to your company website's admin area.

Customization steps

1. Go to **Booking pages** in the bar on the left → **Booking page → Share & Publish**.
2. Select the **Website button** tab (Figure 1).

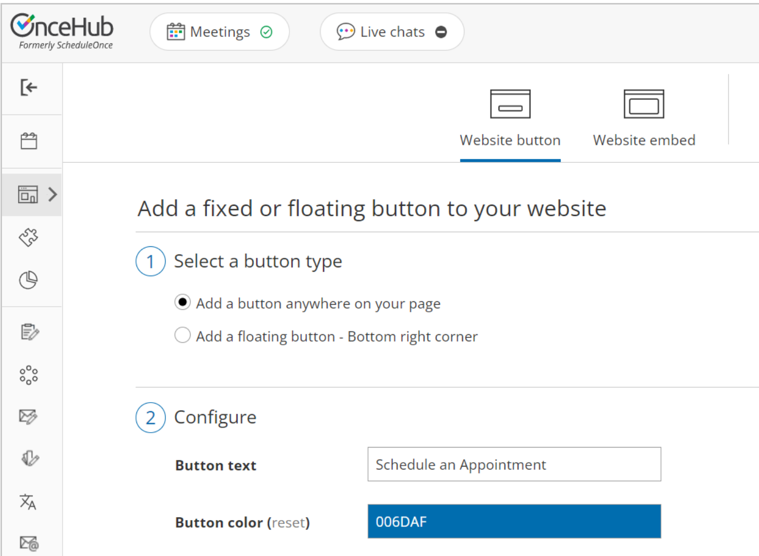


Figure 1: Website button tab

3. In the **Select a button type** step, select whether you want to **Add a button anywhere on your page** or **Add a floating button**.
4. In the **Configure** step, you can edit the **Button text** and select the **Button color**.
5. In the **Select a Booking page** step, select the Booking page or Master page you want to create the website button

for.

6. In the **Customer data** step, select to have Customers fill out the Booking form, or select a web form integration option.
7. From the **Button code** step, choose the **Display type**.
8. Click the **Copy** button to the copy the code to your clipboard.
9. Paste the code into the relevant location on your website.

After you've pasted the code, you can follow the steps below to customize the button design and lightbox layout.

Customizing the button design

You can modify, add, or remove CSS properties in the code to achieve the most effective design for your website visitors. The text on the button can also be modified. The text on the button appears in the code just before the closing </button> tag.

```
<!--ScheduleOnce button START-->

<button id="SOIBTN_BookingPageLink" style="background: #FE9E0C; color: #000000; padding: 10px 20px; border: 1px solid #c8c8c8; font: bold 14px Arial; cursor: pointer;" data-height="580"  data-psz="00" data-so-page="BookingPageLink" data-delay="1">Schedule an Appointment</button>

<script type="text/javascript" src="https://cdn.oncehub.com/mergedjs/so.js"></script>

<!-- ScheduleOnce button END -->
```

The following properties can be modified, among others:

- Background color
- Padding (the spacing between and the text and the border)
- Border thickness and color
- Font family, style and color

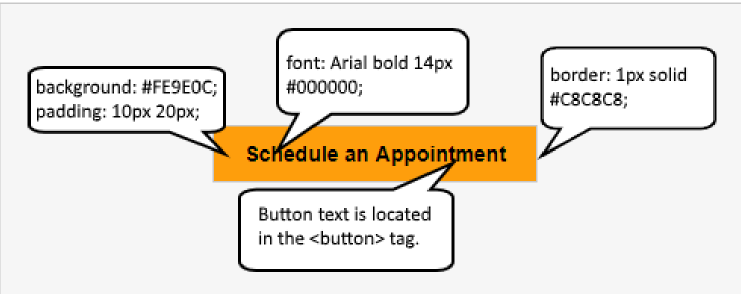


Figure 2: Modifiable button properties

Customizing the lightbox layout

When you use a Website button, the Booking page can either open in a new browser tab or a lightbox. You should choose which option you prefer before copying the code from the **Share & Publish** page. In either case, the design of the scheduling process itself is determined by the Theme applied in the Overview section of the Booking page or Master page you selected in the **Select a Booking page** step.

Note:

On mobile devices, the scheduling pane will always open in a new page, even if you selected the lightbox option.

Open in a lightbox

The **Open in a lightbox** option opens the Booking page or Master page in a lightbox. This option is instant and brandless, allowing your customers to schedule without ever leaving your website.

The lightbox width is a fixed to 796 pixels and cannot be modified. Due to width limitations, on mobile devices the scheduling pane will always open in a new page, even if you selected to open your page in a lightbox.

OnceHub handles the **lightbox height** in two ways:

- **Fixed height**: By default, the height is set to 580 pixels. You can change the default height to any number you want by changing the height property in the code. When the content is longer than the lightbox height, a vertical scroll bar will be added automatically.
- **Responsive height**: This will automatically adjust the height to the frame content. To use this method, you must delete the height property in the code. In this case, the height will adapt to the content of each step in the scheduling process.

```
<!--ScheduleOnce button START-->

<button id="SOIBTN_BookingPageLink" style="background: #FE9E0C; border: 1px solid #C8C8C8; padding: 10px 20px; font: Arial bold 14px #000000;" data-height="580"  data-psz="00" data-so-page="BookingPageLink" data-delay="1">Schedule an Appointment</button>

<script type="text/javascript" src="https://cdn.oncehub.com/mergedjs/so.js"></script>

<!-- ScheduleOnce button END -->
```

Lightbox height recommendations

- For most cases, the default height is the recommended option.
- Modify the lightbox height if the content of the steps in your scheduling process is consistently shorter or longer than the default height.
- Remove the lightbox height attribute completely if you want your Customers to scroll using the external browser scroll bar, rather than the internal lightbox scroll bar.

Open in a new page

The **Open in a new page** option opens your Booking page or Master page as a full page. This is similar to opening your Booking page from a link in an email.

Login integration

Last Modified on Jun 5, 2023

Login integration allows your Customers to schedule an appointment with you from within your app or directly from your password-protected portal, without having to fill in any details you already have. This integration can support your Customer onboarding and support processes as it provides an integrated scheduling option inside your app.

In this article, you'll learn about how login integration works and how to use it.

How does login integration work?

Login integration is implemented by passing Customer authenticated data from your app to one of our Publishing options. The data must be formatted to match our supported OnceHub URL parameters.

Login integration means your Customers only need to choose a time when they make a booking. They don't need to provide any personal information because OnceHub uses your authenticated user information to recognize them. Customers make bookings with the same email address that they used to register for your app. This ensures the booking is correctly assigned to your Customer record and allows you to maintain a holistic view of all Customer activities.

Setting up login integration

1. In the top navigation menu, click on the **Schedule button** and select **Publish on your website**.
2. Choose a publishing option.
   - Website embed: Offer scheduling as an embedded component on any page in your app. In the **Customer data** step, select **Customer data is passed via URL parameters (web form integration)** and select **Skip the Booking form**.
   - Website button: Place a button on any page in your app. In the **Customer data** step, select **Customer data is passed via URL parameters (web form integration)** and select **Skip the Booking form**
   - Website widget: This scheduling option appears as a floating bar at the bottom of each page. Clicking it slides open contact options including scheduling.
3. Click **Copy code** to copy the code to your clipboard.
4. Paste the code into a text editor so you can edit the code for your selected integration option.
5. Add dynamic user attributes to your code. This ensures that your booking process is prepopulated with your logged-in Customer information.
6. Place the code on the relevant pages on your website.

Adding dynamic user attributes to the code

Dynamic user attributes are app-specific and development language-specific attributes that contain your user information. They are retrieved from your database or session. These attributes are created and populated after your Customers successfully sign in to your app.

To make sure your login integration works as intended, you need to add the user attributes in the right place in the provided HTML code. For that, you need to find a specific line in the HTML code and add these attributes at the end of that line.

Find the OnceHub domain

You need to find the following part of the link. You can use the standard "search" feature of the text editor to find this line. Make sure to search for this exact line.

```
//go.oncehub.com/
```

Find the end of the link

To the right of the above link, you'll see additional parameters. These include the name of your Booking page and styling information. You need to find the last attribute in the link to be able to correctly add the dynamic user attributes.

```
//go.oncehub.com/30min_consultation?thm=blue&bc=142CFE&tc=FFFFFF
```

To help you determine if you're looking at the right line in the HTML code, make sure your selected Booking page name appears in the link. The table below breaks-down the link into its different parts to help you find the exact location of your Booking page name.

Link part	Definition
//go.oncehub.com/	The standard OnceHub secure domain. This link is always secure when using one of our Website integration options.
30min_consultation	The name of the Booking page or Master page that you selected for your website integration.
?thm=blue&bc=142CFE&tc=FFFFFF	The styling information defined for your website integration. Styling information include the selected theme, the color of the buttons etc.

Add your dynamic user attributes

Your dynamic attributes should be added at the end of this link. When you add these attributes, you must make sure that they are correctly mapped to our supported OnceHub URL parameters. In addition, login integration supports the **Skip** parameter, which is used to maximize your booking conversions and provide your Customers with a quicker booking process.

Let's look at a PHP development language example. Let's use two session attributes, user_name and user_email, which hold the logged-in user's name and email respectively. The code below illustrates how to place these attributes using PHP's syntax and OnceHub URL parameters.

```
/go.oncehub.com/30min_consultation?thm=blue&bc=142CFE&tc=FFFFFF
&name=<?=user_name?>&email=<?=user_email?>
```

See our supported OnceHub URL parameters article for a full list of supported parameters.

Add a button to Wordpress

Last Modified on Oct 13, 2022

Adding a Website button to your Wordpress blog allows your Customers to schedule an appointment with you without leaving your blog.

In this article, you'll learn how to add a Website button to your Wordpress.org site.

Adding a button to Wordpress

Note:

Some WordPress themes do not support Javascript and therefore cannot support our website integration, which requires Javascript. This is true of all Wordpress.com sites.

Other WordPress themes, depending on how the theme was coded by the individual theme creator, might encounter other issues with the website integration. However, the vast majority work smoothly if the above guidelines are followed.

1. Go to **Booking pages** in the bar on the left → **Booking page → Share & Publish**.
2. Select the **Website button** tab (Figure 1).

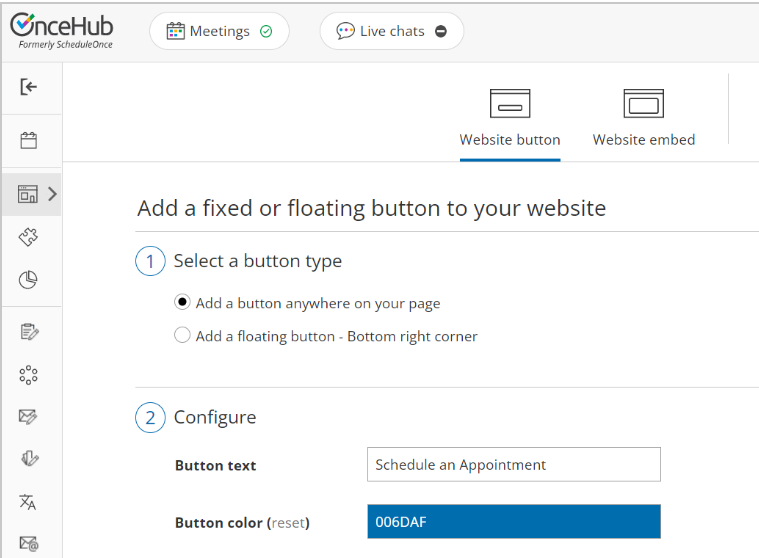


Figure 1: Website button tab

3. In the **Select a button type** step, select whether you want to **Add a button anywhere on your page** or **Add a floating button**.
4. In the **Configure** step, you can edit the **Button text** and select the **Button color**.
5. In the **Select a Booking page** step, select the Booking page or Master page you want to create the website button for.
6. In the **Customer data** step, select to have Customers fill out the Booking form, or select a Web form integration option.
7. From the **Button code** step, choose the **Display type**.
8. Click the **Copy** button to the copy the code to your clipboard.
9. Next, go to your Wordpress Administration page.

10. In the left sidebar, select **Appearance**.
11. Select **Widgets**.
12. Select the **Custom HTML** widget.
13. Next, choose whether you want to add it to your **Blog Sidebar** or **Footer**.
14. Click **Add Widget**.
15. In the **Custom HTML** pop-up, paste the button code from OnceHub.
16. Click **Done**.
17. Test the button on your blog and make any adjustments.

Introduction to general and one-time links

Last Modified on Oct 13, 2022

Once you've finished setting up your Booking pages and Master pages, you're ready to start receiving bookings. OnceHub offers a wide range of sharing and publishing options that will help your leads and Customers connect with you and your team.

Accessing Links

Every Booking page and Master page has a unique Public link you can share with prospects and customers to schedule with you.

You can access your booking links by clicking the **Share icon** the top navigation bar (Figure 1).

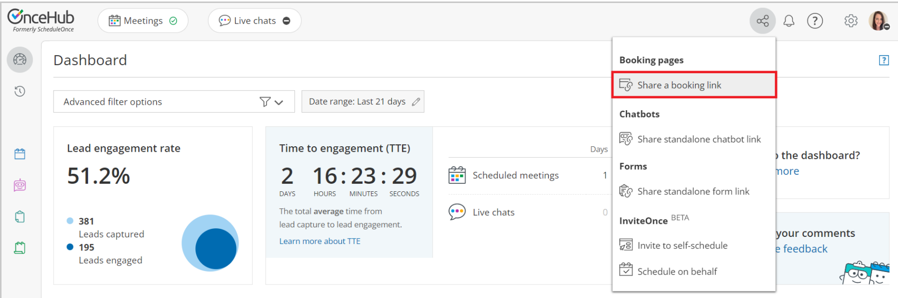


Figure 1: Share a booking link

Sharing your booking links

The links that you share can either be general or personalized.

The simplest way to share your pages is by using General links, which can be sent by email, added to your email signature, or added to any other clickable element. General links require your Customers to identify themselves by filling in their personal details on a Booking form during the booking process.

You can also use the OnceHub for Gmail extension to schedule with Personalized links directly from your Gmail account. You can generate Personalized links, copy them in a single click, and send them in an email.

Personalizing the scheduling experience

You can choose to personalize the scheduling experience for your prospects and Customers, so that they will only have to pick a time without having to provide any information that you already have. The Booking form can either be prepopulated with their details or skipped altogether.

The benefits to personalizing the booking process include:

- Saving your Customers the need to fill out their information, which you already have.
- Increasing conversion rates by saving time and reducing the number of steps it takes to book.
- Ensuring that a lead or Customer always registers with the same email, which will help you avoid CRM duplicate records.

Links can be personalized in any of the following ways:

- Personalized for a specific Customer: This type of link contains the specific Customer's personal details and needs to be created individually for different Customers. These can be created by clicking the **Personalize for a specific Customer** link in the Overview section of a Booking page or Master page.

- Personalized links (URL parameters): These links can be personalized for each recipient receiving the link in a mass email campaign. These links must be sent through an email marketing app that supports merge field.
- Personalized links (Salesforce ID): If you're using our native Salesforce integration, your links can be automatically personalized for each recipient receiving the link in a mass email campaign. These links must be sent from Salesforce or a Salesforce-integrated app.
- Personalized links (Infusionsoft ID): If you're using our native Infusionsoft integration, your links can be automatically personalized for each recipient receiving the link in a mass email campaign. These links must be sent from Infusionsoft or an Infusionsoft-integrated app.

Changing Booking page and Master page links

Booking page links and Master page links are used in all Share & Publish options. In some cases, you may want to change the link that Customers use, such as when a Booking page is reassigned to a different User.

Learn more about changing Booking page and Master page links

Using one-time links

When you use a Rule-based assignment Master page with Dynamic rules, you can generate one-time links which you can send to your Customers to book with you. One-time links are good for one booking only, eliminating any chance of unwanted repeat bookings. A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page.

Learn more about using one-time links

Using General links

Each Booking page and Master page has its own unique Public link that can be shared with your prospects and Customers. The links that you share can either be general or personalized.

Learn more about using General links

Your Booking page link in your email signature

Each Booking page and Master page has its own unique Public link that can be shared with your prospects and Customers. The links that you share can either be general or personalized.

Learn more about your Booking page link in your email signature

Scheduling buttons gallery

The Email button gallery contains buttons available to use in your email signature. You can insert a button into your email signature via URL or by uploading a button image.

Learn more about your Scheduling buttons gallery

Add a Scheduling button to your email signature

A schedule button in your email is a great call-to-action, whether in your daily interactions with Customers or when running email campaigns.

Learn more about adding a Scheduling button to your email signature

Tip:

You can use the OnceHub for Gmail extension to schedule with Personalized links directly from your Gmail account. You can generate Personalized links, copy them in a single click, and send them in an email.

Learn more about OnceHub for Gmail

Using General links

Last Modified on Oct 13, 2022

Each Booking page and Master page has its own unique Public link that can be shared with your prospects and Customers. The links that you share can either be general or personalized.

In this article, you'll learn about using General links.

Understanding General links

Using General links is the simplest way to share your pages. General links are standard links that you can share with Customers to allow them to schedule meetings with you. General links use the format "https://go.oncehub.com/" combined with a Public link name that you provide.

For example, a General link using the Public link name "Dana" would look like this: https://go.oncehub.com/dana.

> **Note :**
>
> Booking pages only use HTTPS and automatically redirect to HTTPS if HTTP is manually typed by a User. However, if you use a custom domain for your Booking page link, HTTPS is not used.

General links can be sent by email, added to your email signature, or added to any other clickable element. When your Customer schedules a meeting using a General link, they will be required to identify themselves by filling in their personal details in the Booking form step.

> **Note:**
>
> If you want to prepopulate the Booking form with a Customer's details, or you want your Customer to skip the Booking form step altogether, you can also create a Personalized link.
>
> When you send a Customer a Personalized link, all they have to do to schedule a meeting is pick a time. Learn more about Personalized links

Accessing your link

You can access your booking links by clicking the **Share icon** in the top navigation bar (Figure 1).

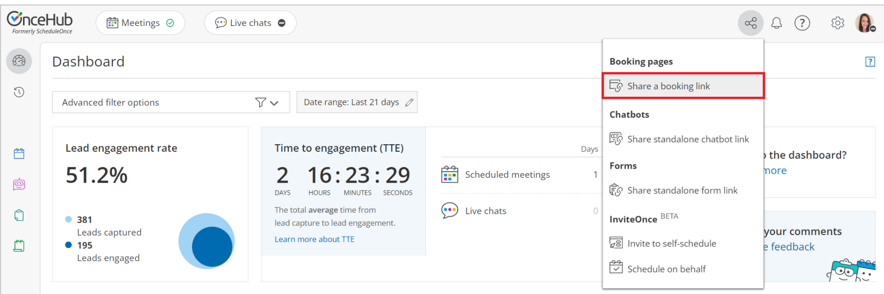


Figure 1: Schedule button

You can also view the booking link for your Booking page or Master page in the page's **Overview** section (Figure 2).

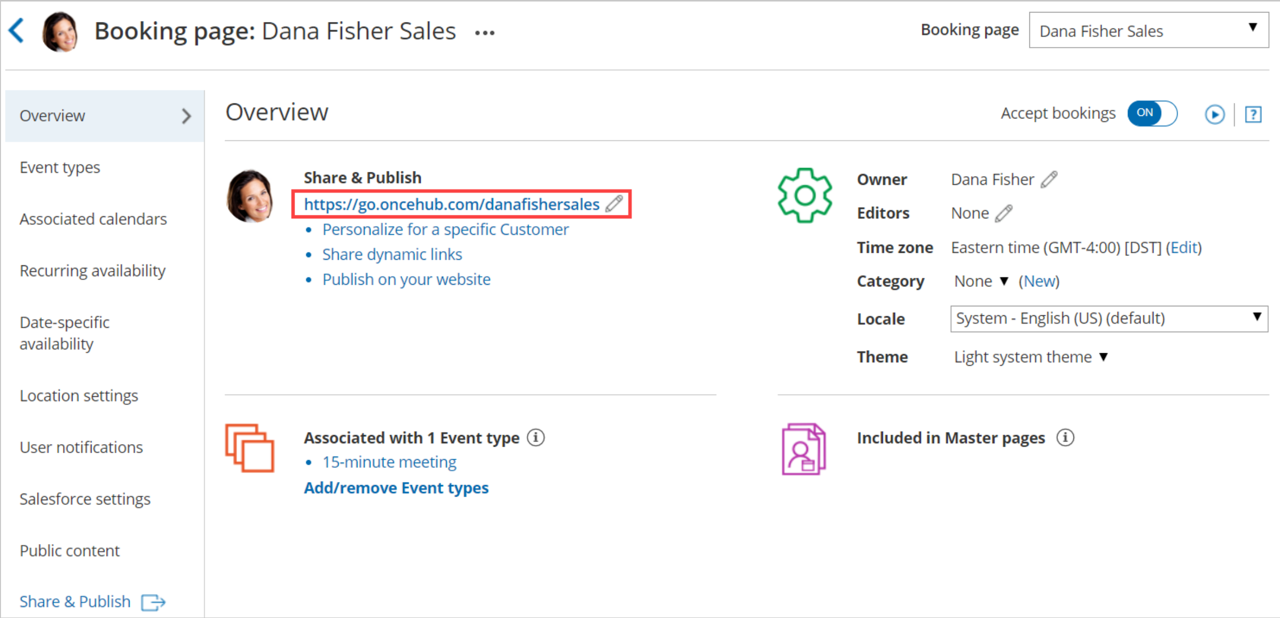


Figure 2: General link on the Booking page Overview section

You can also change the link for your Booking page or Master page in the page's Overview section (Figure 1). Learn more about changing your Booking page or Master page link

Tip:

You can use the OnceHub for Gmail extension to schedule with general links directly from your Gmail account. You can generate links, copy them in a single click, and send them in an email.

Learn more about OnceHub for Gmail

Using one-time links

Last Modified on Jun 15, 2023

Note:

One-time links are only available for Master pages using Rule-based assignment with Dynamic rules.

With OnceHub, you can generate one-time links which are good for one booking only, eliminating any chance of unwanted repeat bookings. A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page.

When you create a one-time link, it's automatically copied to your clipboard with one click, allowing you to quickly generate multiple one-time links that can be sent to different Customers. One-time links can be personalized, allowing the Customer to pick a time and schedule without having to fill out the Booking form.

Tip:

You can use the OnceHub for Gmail extension to schedule with general links directly from your Gmail account. You can generate links, copy them in a single click, and send them in an email.

Learn more about OnceHub for Gmail

Customers can make bookings as normal using the one-time link, and Users and Customers can cancel and reschedule as usual based on your Cancel/reschedule policy. Bookings made using one-time links will also appear as normal bookings in your Activity stream and reports.

In this article, you'll learn how to generate a one-time link.

Requirements

To create a Rule-based assignment Master page with Dynamic rules, you must be a OnceHub Administrator.

Generating a one-time link

To generate a one-time link:

1. Click the **Share icon** in the top navigation bar (Figure 1).

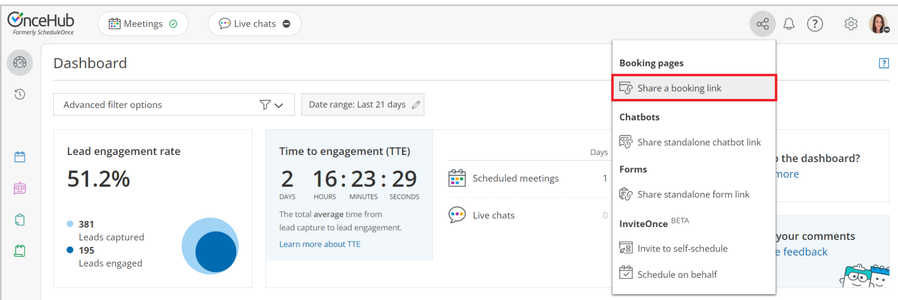


Figure 1: Schedule button

2. Select the relevant Master page.

3. Toggle the **One-time link** option to ON (Figure 2).

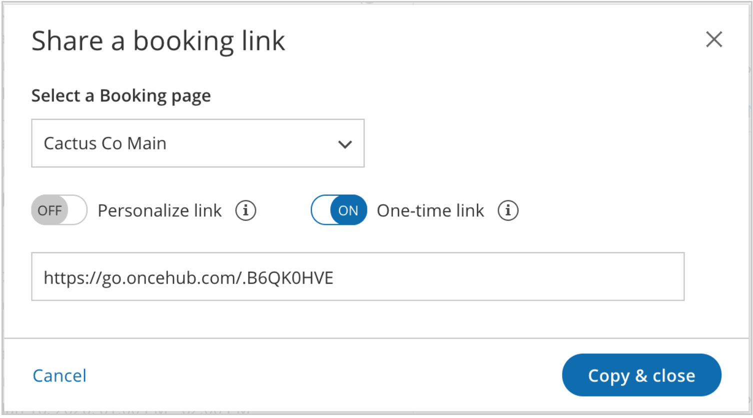


Figure 2: One-time link toggle ON/OFF

You can also generate a one-time link in the **Overview** section of the relevant Master page:

1. Go to **Setup** in the top navigation bar.
2. Select the relevant Master page that you would like to generate a one-time link for.
3. In the Master page Overview section, click **Generate a one-time link** in the **Share & Publish** section (Figure 3).

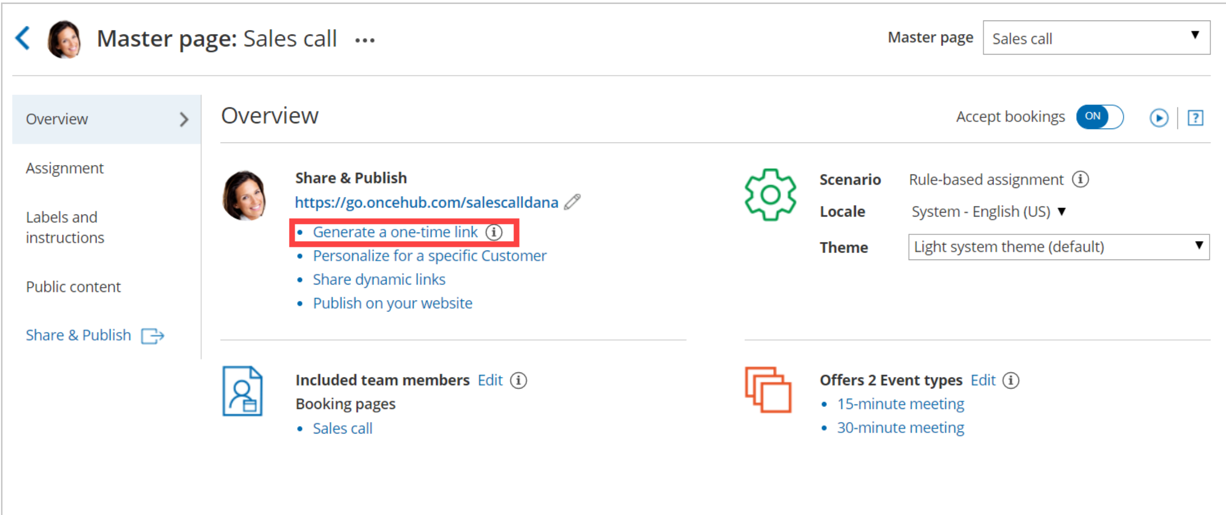


Figure 3: Generating a one-time link in the Master page Share & Publish section

4. The **One-time link** pop-up will appear (Figure 4).

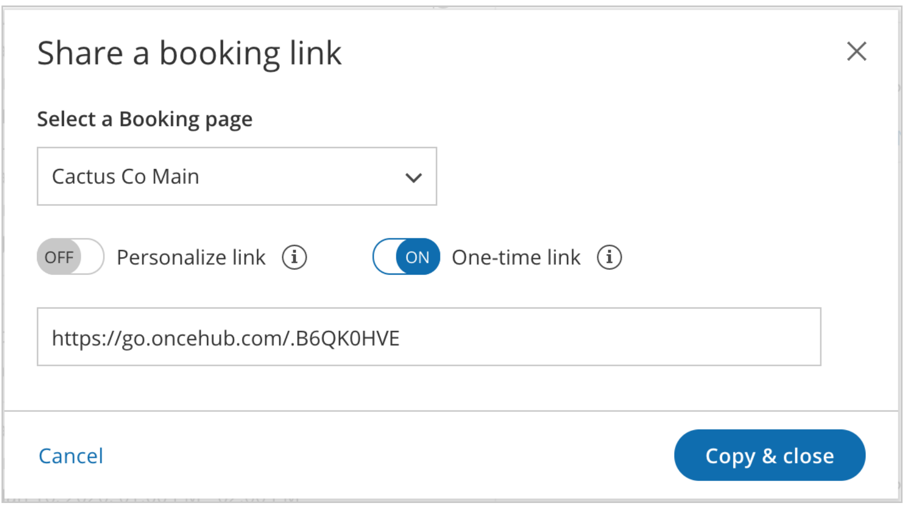


Figure 4: One-time link pop-up

5. Toggle **Personalize link** to ON if you would like to personalize the one-time link for a Customer (Figure 5). Enter a

Customer name and **Customer email**.

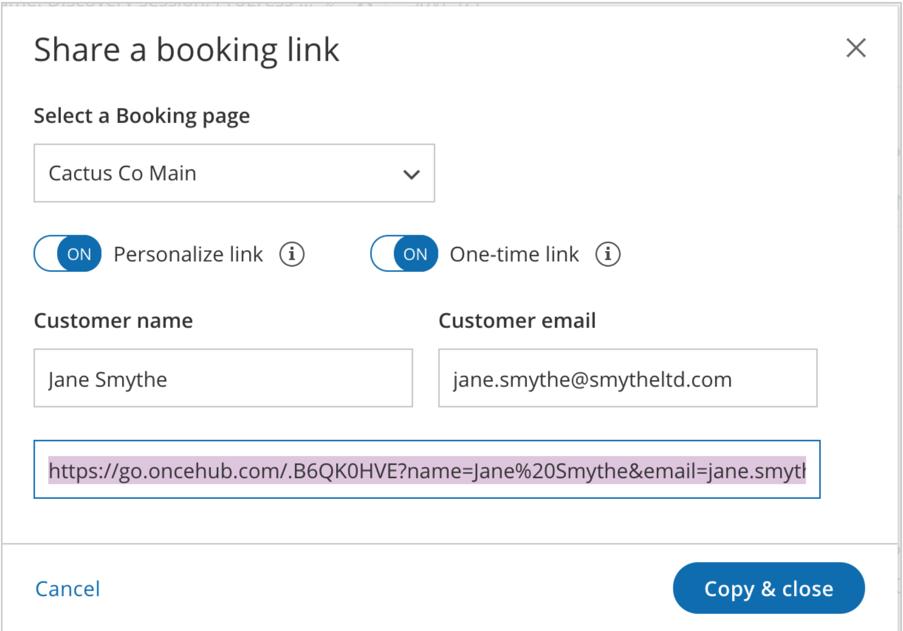


Figure 5: Personalize link enabled

Note :

When you personalize a one-time link, the Booking form step will be skipped. Skipping the Booking form step allows for a quicker booking process for your Customers.

You can choose to show the Booking form by changing the **Skip** URL parameter to "&skip=0". Learn more about using OnceHub URL parameters

6. Click **Copy & close** to copy the one-time link to your clipboard and close the pop-up. You can then paste the one-time link into an email or instant message and send it to your Customer.

You can also generate a one-time link from the **Booking page scheduling setup** (Figure 6). Click the action menu (three dots) next to the Master page that you would like to generate a one-time link for. Then, select **One-time link**.

Note:

One-time links are only available for Rule-based assignment Master pages with Dynamic rules.

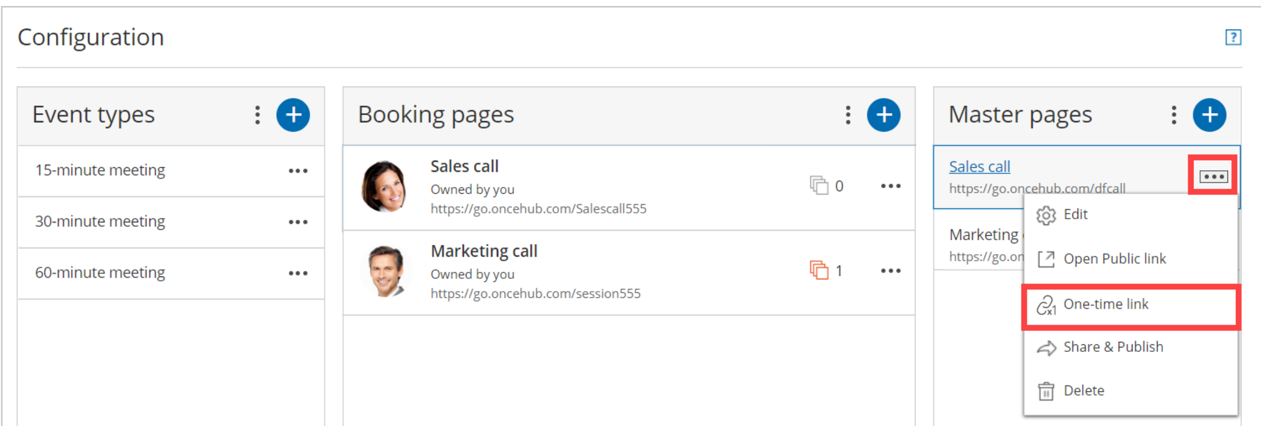


Figure 6: Generating a one-time link from the Booking page scheduling setup

Tip:

You can generate a one-time link for an individual Booking page by creating a new Master page with Dynamic rules and selecting this Booking page as the Primary team member for every Event-based rule you add.

Learn more about generating a one-time link for an individual Booking page

Changing the Master page Rule type

If you change the Rule type of your Master page from Dynamic to Static, Customers will not be able to use any one-time link that you previously generated.

If a Customer used the one-time link to make a booking **before** you changed the Rule type from Dynamic to Static, that booking can be cancelled but not rescheduled.

Changing Booking page and Master page links

Last Modified on Oct 13, 2022

Booking page links and Master page links are used in all of OnceHub's Share & Publish options. In some cases, you may want to change the link that Customers use, such as when a Booking page is reassigned to a different User.

In this article, you'll learn how to change a Booking page or Master page link.

What happens when you change your link?

When you change the link, the former link will no longer work. Any sharing and publishing options that you used will need to be updated with the new link. Customers will not be able to cancel or reschedule any bookings that they made using the former link.

Requirements

To change the link, you must meet the following requirements:

- Be an Owner or an Editor of the page.
- Have the permission to edit the Overview section.

Learn more about Booking page access permissions

Changing your link

1. Go to **Booking pages** in the bar on the left.
2. Select the Booking page or Master page that you would like to edit.
3. In the Overview section, click the **Edit** icon next to the link (Figure 1).

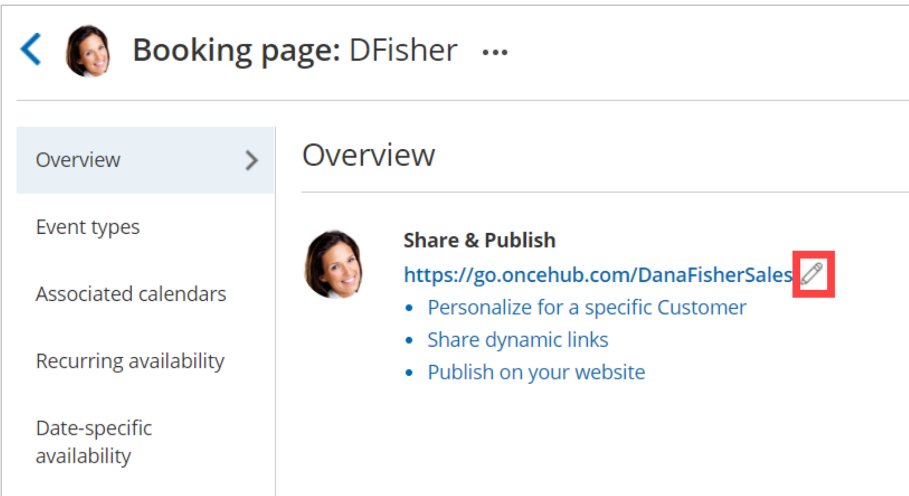


Figure 1: Booking link edit icon

4. The Booking page or Master page **Primary settings** pop-up will open (Figure 2).

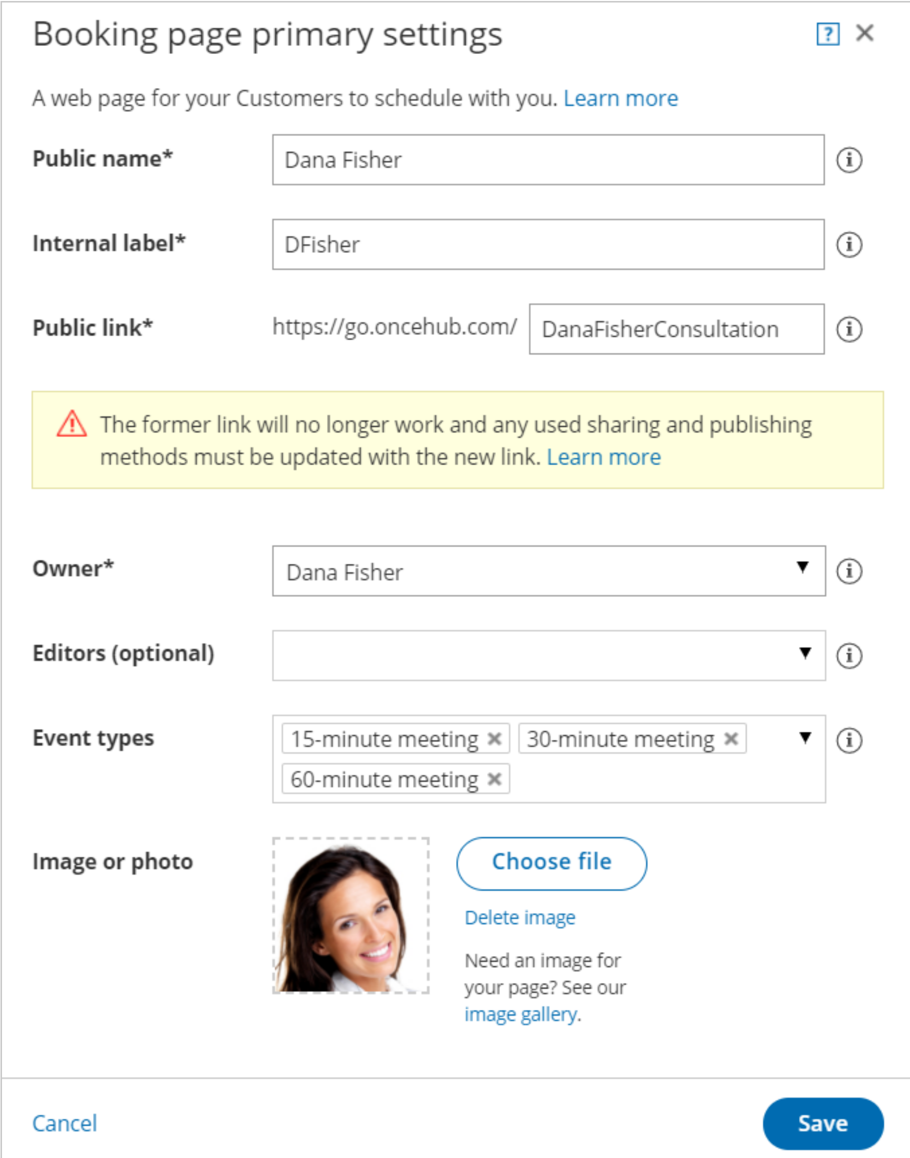


Figure 2: Booking page primary settings pop-up

5. Change the **Public link** to the new link that you need.

> **Note :**
>
> The former link will no longer work, and any sharing and publishing methods that you previously used must be updated with the new link.

6. Click **Save**.

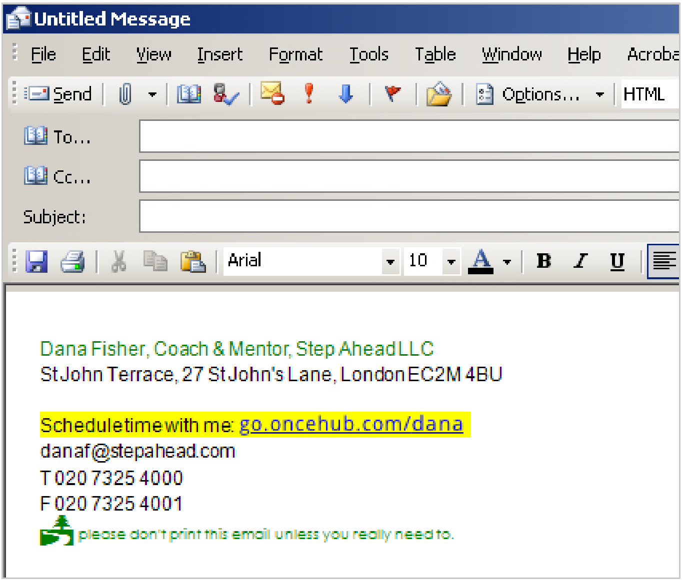
Your Booking page link in your email signature

Last Modified on Jul 29, 2019

Wondering how to add your Booking page link to your email signature? This article is a collection of email signature examples using the link. You can also add a schedule button instead of the link, or in addition to it. Learn more about adding a button to your email

If you have more ideas, we would be happy to receive more examples. Send your idea to us as a graphic attachment and we'll add it here.

Schedule time with me



Schedule a meeting

Schedule online

Book appointment

Figure 1: Schedule time with me

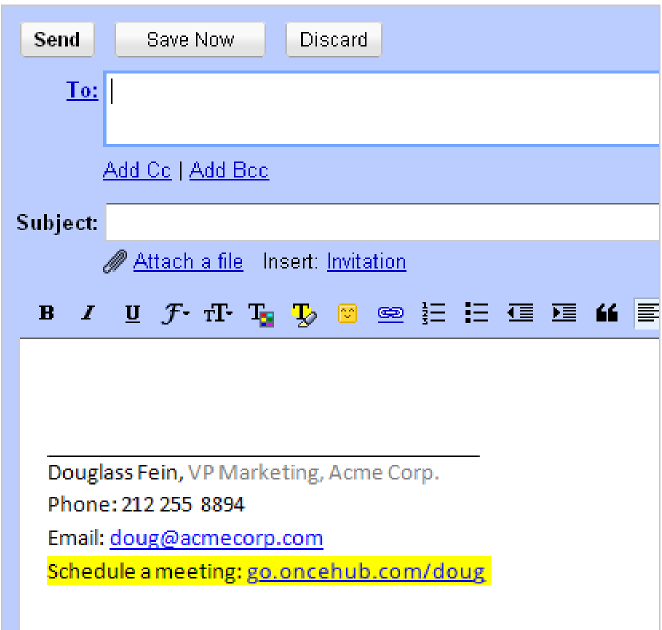


Figure 2: Schedule a meeting

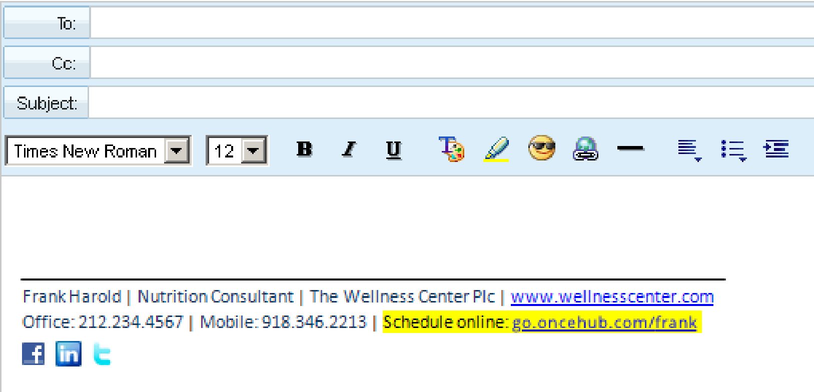


Figure 3: Schedule online

Figure 4: Book appointment

Add a Scheduling button to your email signature

Last Modified on Jun 15, 2023

A schedule button in your email is a great call-to-action, whether in your daily interactions with Customers or when running email campaigns. See our full Email button gallery

In this article, you'll learn the two ways to insert a button into your email signature. The method you choose will depend on your settings.

Insert via URL

You can insert a button without downloading the image to your computer. Most web-based email programs allow you to do this, including Gmail.

1. Review the buttons in our scheduling buttons gallery.
2. Copy one of the button links on the right.
3. In your email signature editor, click the insert picture icon (Figure 1) and paste the link in the URL field.

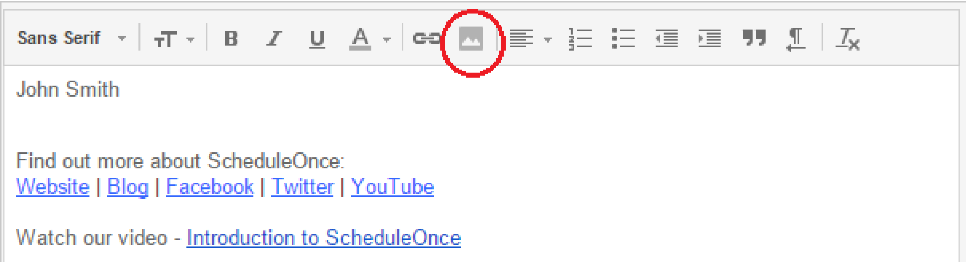


Figure 1: Picture icon in email signature editor

4. In the editor pane, select the newly-added button image to highlight it.
5. Click the Add link icon and add your Booking page link (Figure 2).

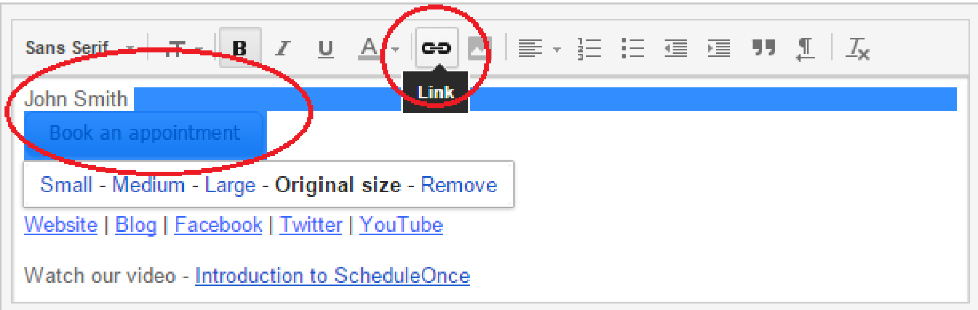


Figure 2: Add a link to your button

Insert by uploading a button image

You can also insert a button by downloading the image to your computer and then uploading it to your email program. Follow these steps if you use Outlook or another desktop email program.

1. Review the buttons in our scheduling buttons gallery.
2. Select the one you want
3. Save the button to your computer by right-clicking on the button and selecting **Save image as...**

4. In the email signature editor, click the Upload image icon (Figure 3) and select the file you've just saved.

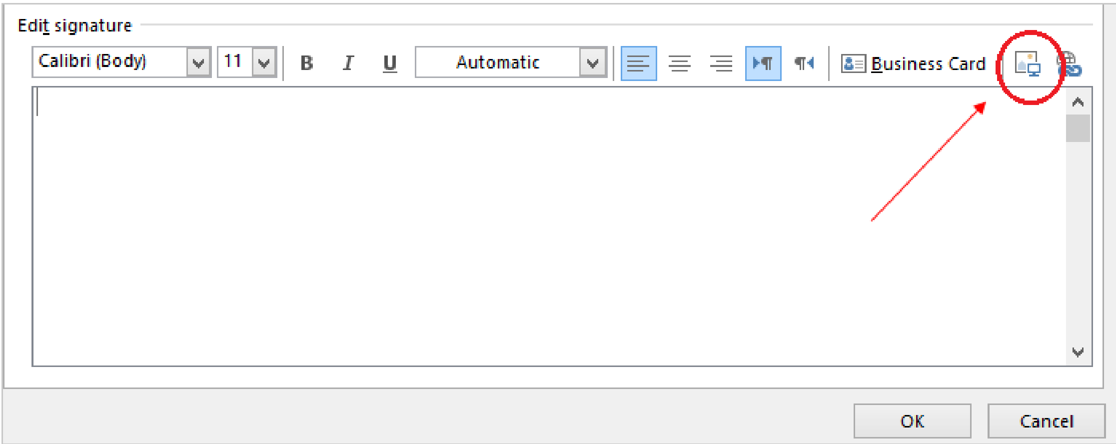


Figure 3: Upload image icon

5. In the editor pane, select the newly-added button image to highlight it.
6. Click the Add link icon (Figure 4) to add your Booking page link to the image.

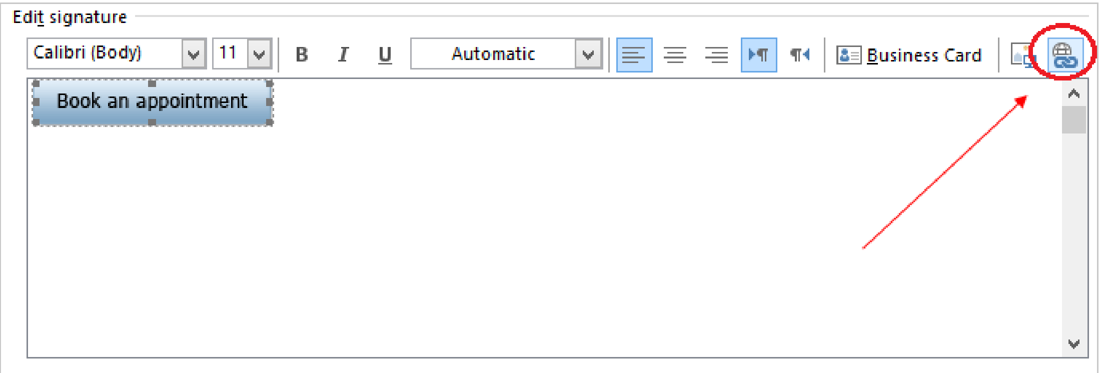


Figure 4: Add link icon

Note:

Every email program is different and the images used in this article may not match your email client's interface exactly.

See our full Email button gallery

Scheduling buttons gallery

Last Modified on Jul 29, 2019

The Email button gallery, below, contains buttons available to use in your email signature. You can insert a button into your email signature via URL or by uploading a button image. Learn more about adding a schedule button to your email signature.

Book an appointment

Book an appointment http://cdn.oncehub.com/resources/buttons/BookAnAppointment_blue.png

Book an appointment http://cdn.oncehub.com/resources/buttons/BookAnAppointment_green.png

Book an appointment http://cdn.oncehub.com/resources/buttons/BookAnAppointment_orange.png

Schedule Now

Schedule now http://cdn.oncehub.com/resources/buttons/ScheduleNow_blue.png

Schedule now http://cdn.oncehub.com/resources/buttons/ScheduleNow_green.png

Schedule now http://cdn.oncehub.com/resources/buttons/ScheduleNow_orange.png

Book Now

Book now http://cdn.oncehub.com/resources/buttons/BookNow_blue.png

Book now http://cdn.oncehub.com/resources/buttons/BookNow_green.png

Book now http://cdn.oncehub.com/resources/buttons/BookNow_orange.png

Meet with me

Meet with me http://cdn.oncehub.com/resources/buttons/MeetWithMe_blue.png

Meet with me http://cdn.oncehub.com/resources/buttons/MeetWithMe_green.png

Meet with me http://cdn.oncehub.com/resources/buttons/MeetWithMe_orange.png

Book online

Book online http://cdn.oncehub.com/resources/buttons/BookOnline_blue.png

Book online http://cdn.oncehub.com/resources/buttons/BookOnline_green.png

Book online http://cdn.oncehub.com/resources/buttons/BookOnline_orange.png

Schedule online

Schedule online http://cdn.oncehub.com/resources/buttons/ScheduleOnline_blue.png

Schedule online http://cdn.oncehub.com/resources/buttons/ScheduleOnline_green.png

Schedule online http://cdn.oncehub.com/resources/buttons/ScheduleOnline_orange.png

Book a consultation

Book a consultation http://cdn.oncehub.com/resources/buttons/BookAConsultation_blue.png

Book a consultation http://cdn.oncehub.com/resources/buttons/BookAConsultation_green.png

Book a consultation http://cdn.oncehub.com/resources/buttons/BookAConsultation_orange.png

Speak with a consultant

Speak with a consultant http://cdn.oncehub.com/resources/buttons/SpeakWithAConsultant_blue.png

Speak with a consultant http://cdn.oncehub.com/resources/buttons/SpeakWithAConsultant_green.png

Speak with a consultant http://cdn.oncehub.com/resources/buttons/SpeakWithAConsultant_orange.png

Schedule Time

Schedule Time http://cdn.oncehub.com/resources/buttons/ScheduleTime_blue.png

Schedule Time http://cdn.oncehub.com/resources/buttons/ScheduleTime_green.png

Schedule Time http://cdn.oncehub.com/resources/buttons/ScheduleTime_orange.png

Book an appointment online

Book an appointment online

http://cdn.oncehub.com/resources/buttons/BookAnAppointmentOnline_blue.png

Book an appointment online

http://cdn.oncehub.com/resources/buttons/BookAnAppointmentOnline_green.png

Book an appointment online

http://cdn.oncehub.com/resources/buttons/BookAnAppointmentOnline_orange.png

Using Personalized links

Last Modified on Oct 13, 2022

Each Booking page and Master page has its own unique Public link that can be shared with your prospects and Customers. The links that you share can either be general or personalized.

In this article, you'll learn about the different types of Personalized links and how to use them.

Understanding Personalized links

You can use Personalized links to personalize the scheduling experience for prospects and Customers. When you send a Customer a Personalized link, they will pick a time to schedule the meeting without having to provide any information that is already known to you. Personalized links can be static or dynamic. Whether a link is static or dynamic is based on how Customer data is passed.

Personalized links with static variables

Static Personalized links are links that are uniquely personalized for a specific Customer and contain the Customer's personal details. For example, the Personalized link could contain the Customer's name and email address.

The following link is an example of a static Personalized link containing the personal details of a Customer called "John": https://go.oncehub.com/dana?name=John&email=john@example.com&skip=1.

Personalized links with static variables

Personalized links for specific Customers

You can create a static Personalized link for a specific Customer using the OnceHub link builder (Figure 1). The easiest way to access this is by selecting the **Share icon** in your top navigation bar (Figure 1).

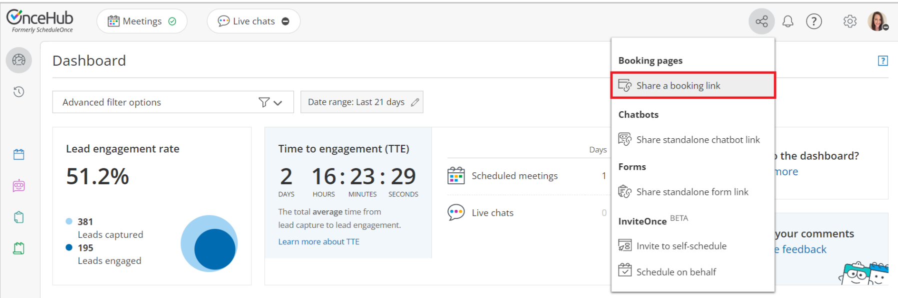


Figure 1: Share a booking link

This type of Personalized link uses Customer details that you add in the link builder when you create the link. Personalized links for specific Customers need to be created individually for each Customer.

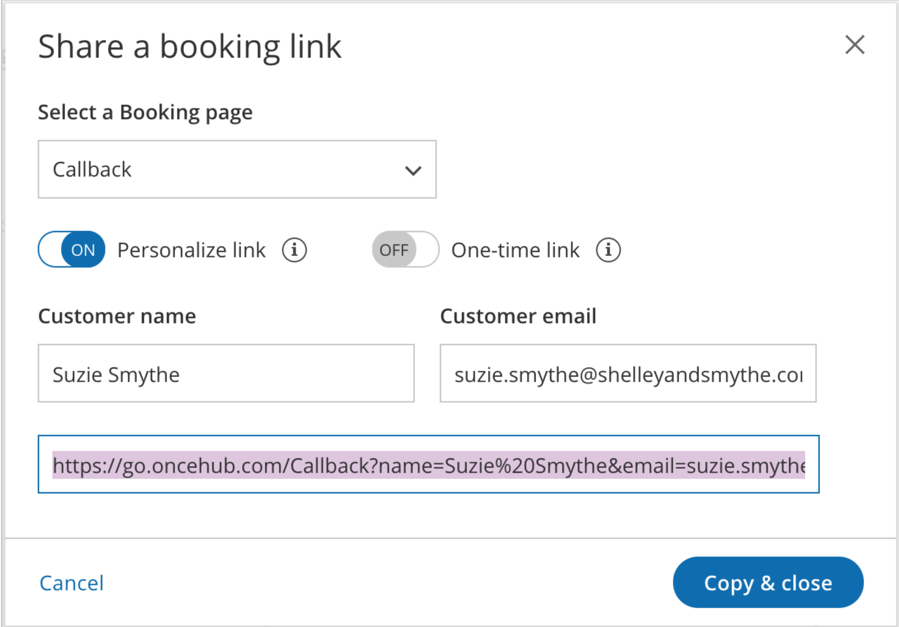


Figure 2: Link builder

You can choose to skip the Booking form step to allow for a quicker booking process for your Customers. You can also use additional URL parameters if required.

You can also create this type of Personalized link by going to the Overview section of a Booking page or Master page and clicking **Personalize for a specific Customer** (Figure 3).

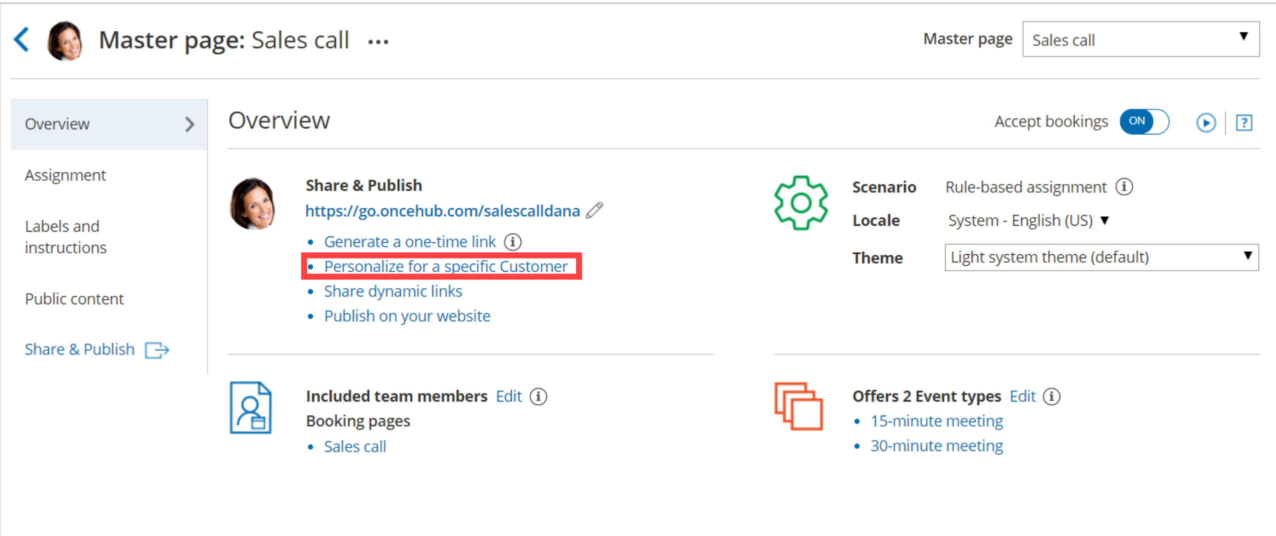


Figure 3: Personalize for a specific Customer

Learn more about creating a Personalized link for a specific Customer

Personalized one-time links

You can also use one-time links to create a static Personalized link for a specific Customer. One-time links are good for one booking only, eliminating any chance of unwanted repeat bookings. A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page.

Note:

One-time links are only available for Master pages using Rule-based assignment with Dynamic rules.

To create a Personalized one-time link, go to the **Schedule button** in your top navigation bar, select **Share a booking link**, and and toggle both the **Personalize link** and **One-time link** options to ON.

You can also go to the Overview section of your Master page and click **Generate a one-time link**. Then, in the **One-time link** pop-up, toggle **Personalize link** to ON (Figure 4).

When you personalize a one-time link, the Booking form step is skipped by default. You can choose to show the Booking form by changing the **Skip** URL parameter to "&skip=0". Learn more about using OnceHub URL parameters

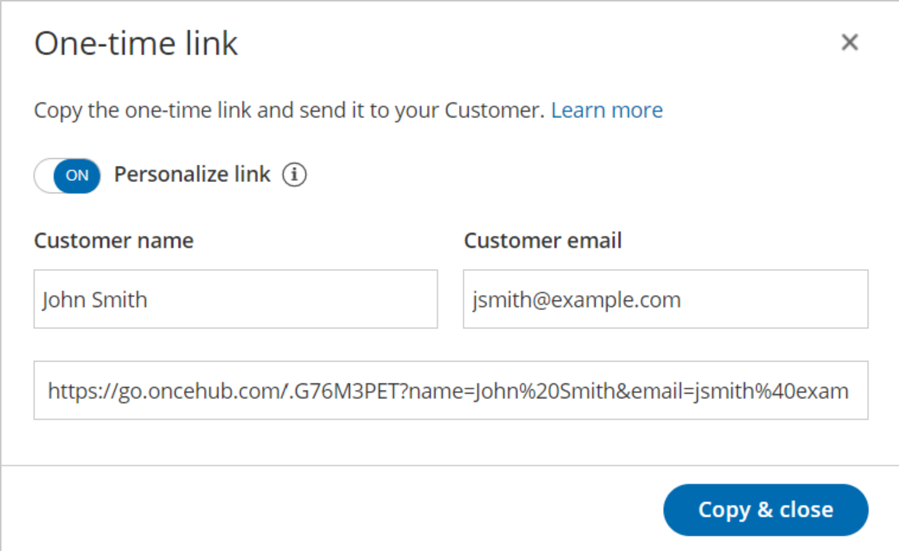


Figure 4: Personalizing a one-time link

Learn more about using one-time links

Personalized links with dynamic variables

Dynamic Personalized links are links that contain field mapping information, i.e. names of fields that exist in a CRM record ID or in a third-party marketing app such as MailChimp.

For example, the following dynamic link contains MailChimp fields, which are automatically replaced with subscriber information during an email campaign: *https://go.oncehub.com/dana?name=*|NAME|*&email=*|EMAIL|*.*

If you need to replace the **ADD_DYNAMIC_FIELD** placeholders (Figure 4) with your own parameters, you can copy the link to a notepad. Learn more about supported OnceHub URL parameters

When you create a dynamic Personalized link, you can also choose to prepopulate the Booking with the Customer's details or skip the Booking form step altogether.

Learn more about Personalized links with dynamic variables

Using dynamic URL parameters

You can pass Customer information using parameters passed in the URL (such as the Customer's name, email, or phone number). These links can be personalized for each recipient receiving the link in a mass email campaign. These links must be sent through a email marketing app that supports merge fields.

Learn more about Personalized links using URL parameters

Using CRM record IDs

You can also pass Customer information using data that's stored in a database such as your Infusionsoft CRM, Salesforce CRM, or your OnceHub account.

- Personalized links (Salesforce ID): If you're using our native Salesforce integration, your links can be automatically personalized for each recipient receiving the link in a mass email campaign. These links must be sent from Salesforce or a Salesforce-integrated app.

- Personalized links (Infusionsoft ID): If you're using our native Infusionsoft integration, your links can be automatically personalized for each recipient receiving the link in a mass email campaign. These links must be sent from Infusionsoft or an Infusionsoft-integrated app.

Learn more about personalized links using CRM record IDs

Booking form prepopulation and skipping

When you create a Personalized link, you can choose to prepopulate the Booking with the Customer's details or skip the Booking form step altogether.

Prepopulating the Booking form

If you already have some of your Customer's information and want to collect additional information, or you want to make sure the information is up-to-date, you can **prepopulate** the Booking form with your current Customer information.

When the Booking form is prepopulated, it can operate in two modes: private or public. The mode of the Booking form depends on the source of the prepopulation data. Prepopulation data can originate from two sources:

- Parameters passed in the URL to the Booking page.
- Customer information stored in a Database such as your CRM or OnceHub account.

Learn more about prepopulated Booking forms

Skipping the Booking form

This option skips the Booking form step entirely and means your Customers only needs to choose a time to complete the booking. Skipping the Booking form provides a quicker booking process to your existing leads or Customers.

This functionality only works if the skipping rules apply. For example, both the Name and Email system fields must be provided in the URL because they are mandatory fields in OnceHub. The Booking form will not be skipped if these fields are empty, and a prepopulated Booking form will be shown instead to give the Customer an opportunity to fill out these fields.

Learn more about OnceHub URL parameters and processing rules

Introduction to Personalizing links with static parameters

Last Modified on Oct 13, 2022

After setting up your Booking pages or Master pages, you'll need to share them with your prospects and Customers. In this section, you will learn how to Personalize links with static parameters.

Options for sharing your booking links in email and other apps

Booking pages can be shared using a **General link,** a **Personalized link (URL parameters)**, a **Personalized link (Salesforce ID)**, or a **Personalized link (Infusionsoft ID)**.

To access the links available to you, go the **Share icon** in the top navigation bar and select **Share a booking link**. From there, you can select the relevant Booking page or Master page.

Learn more about sharing your booking links in email and other apps

Using Personalized links

Each Booking page and Master page has its own unique Public link that can be shared with your prospects and Customers. The links that you share can be personalized to improve the experience for prospects and Customers.

You can personalize booking links in several ways:

- Using static variables
- Using specific Customers details
- Using dynamic variables
- Using dynamic URL parameters
- Using CRM record IDs
- Pre-populating information from a booking form

Learn more about using Personalized links

OnceHub URL parameters and processing rules

You can share your Booking page or Master page using Personalized links (URL parameters), or publish them on your website using Web form integration. If required, you can replace the OnceHub placeholder parameters with your own parameters.

Learn more about OnceHub URL parameters and processing rules

Creating a Personalized link for a specific Customer

You can create a static Personalized link using a Customer's personal details. The easiest way to do this is by selecting the **Share icon** in your top navigation bar (Figure 1).

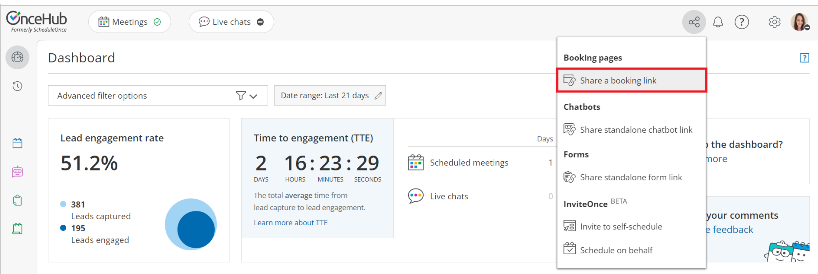
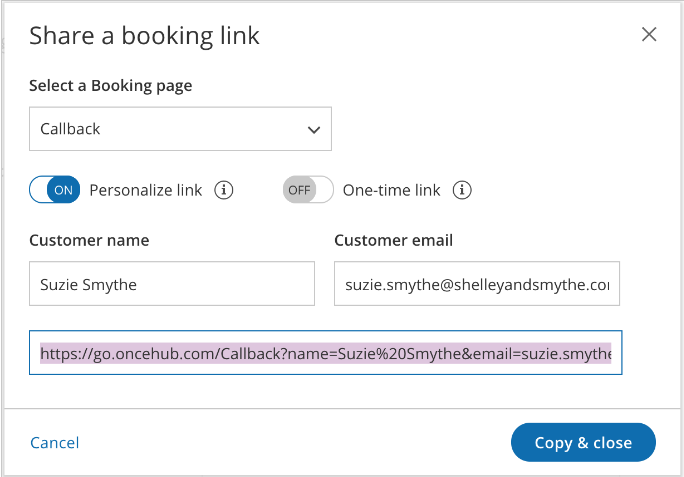


Figure 1: Schedule button

Toggle the **Personalize link** option to ON and enter the Customer's name and email address (Figure 2).



You can also navigate to the Overview section of the selected page, and click **Personalize for a specific Customer** (Figure 3).

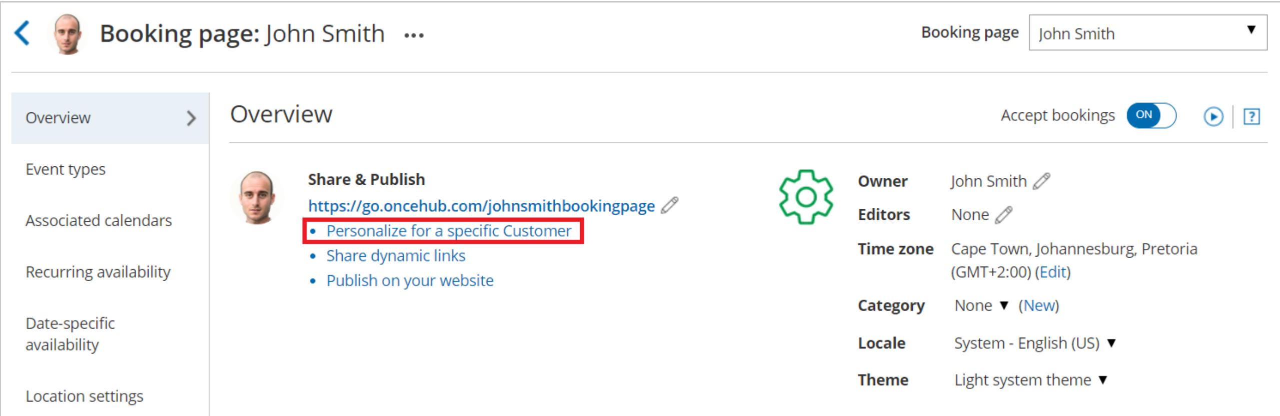


Figure 2: Booking page Overview section

Learn more about Creating a Personalized link for a specific Customer

Creating a Personalized link for a specific Customer

Last Modified on Oct 13, 2022

You can build a static Personalized link that includes a Customer's personal details. Personalized links for a specific Customer are based on URL parameters and are best used when you want to send a single email to a particular Lead or Customer. These links are different from dynamic links that are used when you want to send Personalized links to a large group of leads or Customers as part of an email campaign.

For example, a Sales Representative wants to send an email to a specific lead named "John". They want to include a personalized "Book time with me" link in the body of the email. This link will take John straight to a Booking page where he can choose a date and time for the meeting without needing to enter any personal information such as name and email.

The Sales Representative can create a Personalized link that looks like this: https://go.oncehub.com/dana?name=John&email=john@example.com&skip=1

Tip:

You can use the OnceHub for Gmail extension to schedule with Personalized links directly from your Gmail account. You can generate links, copy them in a single click, and send them in an email.

Learn more about OnceHub for Gmail

Note:

When you use Personalized links with Booking pages that don't have Event types, it's recommended that you provide the **Subject field** of your Booking form.

To add a Subject field to your Booking form, go to **Booking pages** on the left → relevant Booking page → **Booking form → Meeting subject.** Select the **Meeting subject is set by the owner** option and enter the desired **Meeting subject** specific to your business case. Learn more about the Subject field

Creating a Personalized link specific for a Customer

1. Go to **Booking pages** on the left.
2. Select the relevant Booking page or Master page.
3. In the Overview section of the selected page, click **Personalize for a specific Customer** (Figure 1).

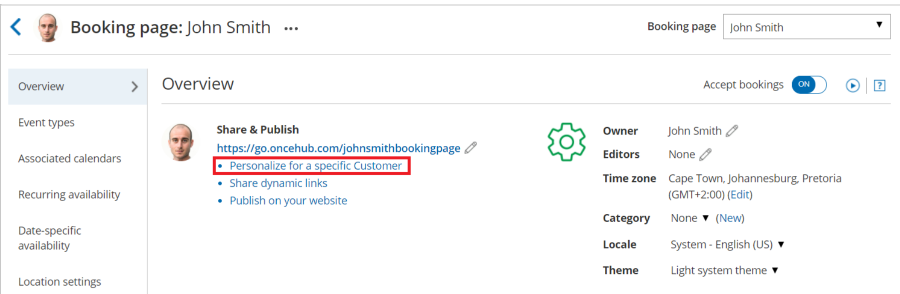


Figure 1: Booking page Overview section

4. In the **Personalize the link for a specific Customer** pop-up, enter the **Customer name** and **Customer email** (Figure 2).
   - By default, the **Skip booking form** field will be toggled **ON** once you've entered your Customer details. Skipping the Booking form step allows for a quicker booking process for your Customers.
   - If you want to disable skipping the booking form, toggle the **Skip booking form** field to **OFF**.

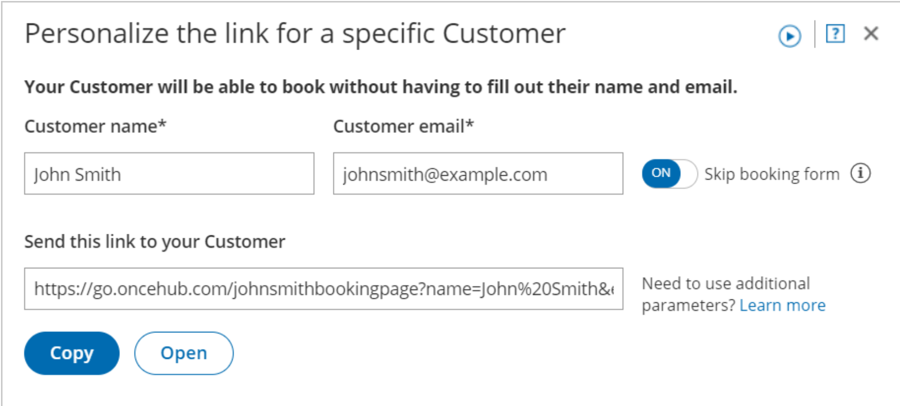


Figure 2: Personalize the link for a specific Customer pop-up

5. To test the link, click the **Open** button.
6. Click the **Copy** button to copy the link to your clipboard.
7. Finally, paste the link into your email.

Note:

If required, you can include additional fields in the URL. Learn more about OnceHub URL parameters

Personalizing links with dynamic parameters

Last Modified on Apr 6, 2020

After setting up your Booking pages or Master pages, you'll need to share them with your prospects and Customers. In this section, you will learn how to Personalize links with dynamic parameters.

Creating a Personalized link using URL parameters

Personalized links using URL parameters are Booking page links that contain Customer information and Booking form data. With **Personalized links (URL parameters)**, prospects and Customers click on your Booking page link and pick a time, without having to provide any information that is already known to you.

The Booking form can either be prepopulated with their details or skipped altogether. You can also add source tracking tags to personalized Booking page links, letting you analyze where your bookings come from.

Learn more about creating a Personalized link using URL parameters

Personalized links using CRM record IDs

Personalized links using CRM record IDs can be either static or dynamic, but are most often used as dynamic links. In contrast to Personalized links (URL parameters), these links include a CRM record ID instead of actual Customer information. The record ID is used to retrieve Customer information from your CRM via an API.

Learn more about personalized links using CRM record IDs

Using Personalized links (URL parameters) in email marketing apps

You can use dynamic personalized links in any email marketing app that supports merge fields.

Learn more about using Personalized links (URL parameters) in email marketing apps

Maximizing booking rates in marketing campaigns

When booking appointments is part of your lead generation or lead qualification marketing campaigns, it's important to optimize your booking rates.

Learn more about maximizing booking rates in marketing campaigns

Personalizing with dynamic URL parameters

Last Modified on Oct 13, 2022

Personalized links using URL parameters are Booking page links that contain Customer information and Booking form data. With **Personalized links (URL parameters)**, prospects and Customers click on your Booking page link and pick a time, without having to provide any information that is already known to you.

The Booking form can either be prepopulated with their details or skipped altogether. You can also add source tracking tags to personalized Booking page links, letting you analyze where your bookings come from.

Note:

When you use Personalized links with Booking pages that are not associated with any Event types, it is highly recommended you provide the **Subject** field of your Booking form.

You can do this by going to **Booking pages** on the left → Relevant Booking page→ **Booking form and redirect**. In the **Meeting subject** section, select **Meeting subject is set by the Owner (you)**. You can then enter a meeting subject for your specific business case.

Learn more about the Subject field

Creating a Personalized link (URL parameters)

1. Go to **Booking pages** in the bar on the left → **Booking page → Share & Publish**.
2. Select the **Mail merge** tab.
3. Select the relevant Booking page in the drop-down menu (Figure 1).

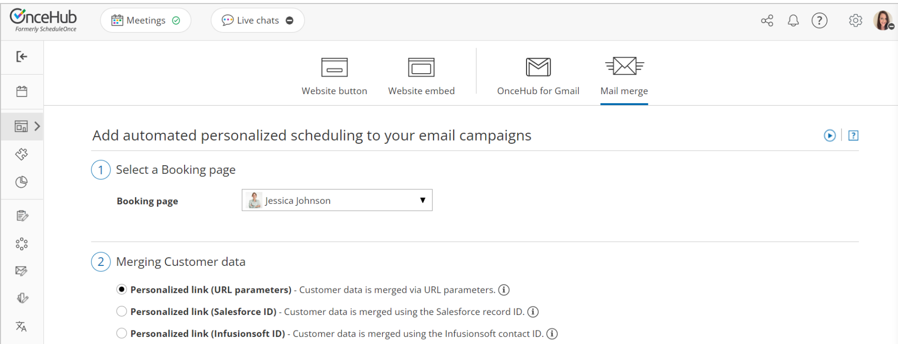


Figure 1: Select a Booking page drop-down menu

4. In the **Customer data** step (Figure 2), select **Personalized link (URL parameters)**.

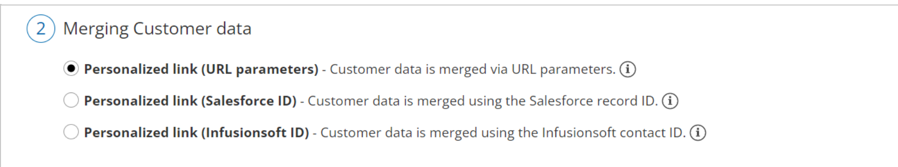


Figure 2: Customer data step

5. In the **Booking form step**, you can select one of the two options below:

- **Skip the Booking form:** Skipping the Booking form helps you maximize your booking conversions and provides your Customers with a quicker booking process.
- **Prepopulate the Booking form:** If you select this option, the booking data is visible in the Booking form and can be edited by the Customer before submission. Learn more about prepopulated Booking forms

6. In the **Copy link** step, click **Copy link** to copy the Personalized link to your clipboard (Figure 3).

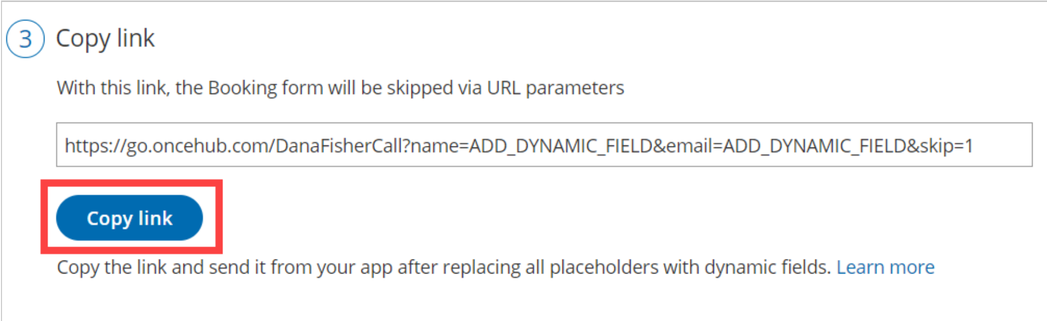


Figure 3: Copy link step

Adding your own URL parameters

If you need to replace the **ADD_DYNAMIC_FIELD** placeholders (Figure 4) with your own parameters, you can copy the link to a notepad. Learn more about supported OnceHub URL parameters

Merged values must be properly encoded in order to be passed in the URL. Some characters like at (@), period (.), dash (-) and underscore (_) are OK, but all URL invalid characters like plus (+) or space ( ) must be URL encoded.

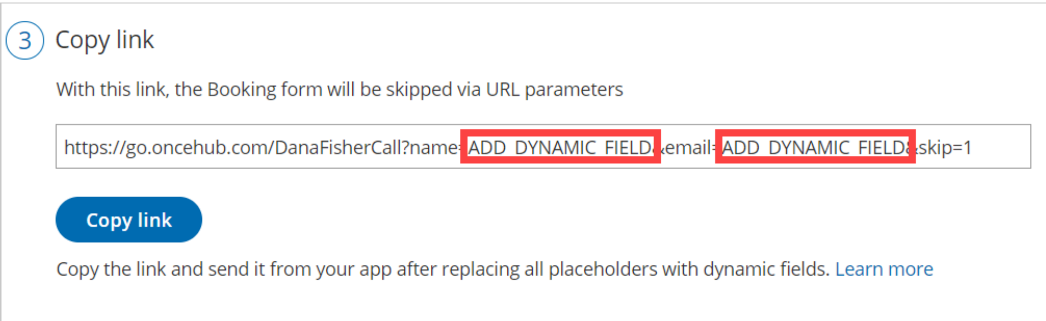


Figure 4: ADD_DYNAMIC_FIELD placeholders

For example, if you use MailChimp, the link might look like this:

https://go.oncehub.com/dana?name=|NAME|*&email=*|EMAIL|**

In this example, the ***|NAME|*** and ***|EMAIL|*** fields are merge fields which are replaced with a single Customer name and email respectively during the email campaign, creating a personalized email for each lead in your list.

Personalizing with dynamic CRM record IDs

Last Modified on Jun 5, 2023

Personalized links using CRM record IDs can be either static or dynamic, but are most often used as dynamic links. In contrast to Personalized links (URL parameters), these links include a CRM record ID instead of actual Customer information. The record ID is used to retrieve Customer information from your CRM via an API.

The Booking form is skipped by default because the Customer information is available during the booking process. The Booking form can be shown with prepopulation data if you want your Customers to provide additional information on the Booking form. Learn more about prepopulated Booking forms

In order for skipping and prepopulation to work properly, you need to make sure that your CRM fields are mapped correctly to your OnceHub fields.

Learn how to set up skipping and prepopulation in Salesforce

Learn how to set up skipping and prepopulation in Infusionsoft

Note:

For security and privacy reasons, using CRM record IDs to skip or pre-populate the Booking form is not compatible with collecting data from an embedded Booking page or redirecting booking confirmation data.

Personalized links using CRM record ID example

Let's assume that you use Salesforce as your CRM and email marketing app. You want to send an email broadcast to all of your leads, inviting them to book a discovery call with you. You would create a Personalized link using CRM record IDs and place it in your email template.

The link might look like this: *https://go.oncehub.com/dana?sosfLeadId={!Lead.Id}&sosfContactId={!Contact.Id}&sosfCaseId={!Case.Id}*.

In this example, "sosfLeadId" and "sosfContactId" refer to the lead and contact identifiers in Salesforce, respectively. "{!Lead.Id}" and "{!Contact.Id}" are replaced with actual lead and contact identifiers during an email broadcast, creating a personalized email for each lead in our list.

This feature is available when using a Salesforce or Infusionsoft CRM integration. You can find more information on setting up these links by visiting the articles below.

Salesforce articles

- Using Personalized links (Salesforce ID)
- Prepopulating or hiding the Booking form step in Salesforce integration
- Using Salesforce Record IDs to identify Customers during the booking process
- Using Salesforce Record IDs to personalize scheduling in landing pages
- Salesforce scheduling buttons

Infusionsoft articles

- Using Personalized links (Infusionsoft ID)
- Prepopulating or hiding the Booking form step in Infusionsoft integration
- Using Infusionsoft Contact IDs to identify Customers during the booking process
- Using Infusionsoft Contact IDs to personalize scheduling in landing pages

URL parameters syntax and processing rules

Last Modified on Jun 5, 2023

When you pass Customer data via URL parameters, you can share your Booking page or Master page using Personalized links (URL parameters), or publish them on your website using Web form integration. If required, you can replace the OnceHub placeholder parameters with your own parameters.

In this article, you'll learn about the supported OnceHub URL parameters and processing rules.

OnceHub URL structure

Your URL structure must always follow these guidelines:

- If there are no parameters specified, your Booking page or Master page link is structured like this: **https://go.oncehub.com/PageLink**.
  The domain can be our system domain or your own custom domain. Your booking link can be found in the **Overview** section of any Booking page or Master page.
- The first URL parameter can be appended by adding one "?" (question mark) after the page link, followed by "fieldName=value".
  For example: **https://go.oncehub.com/PageLink?name=John**
- All subsequent URL parameters are added by adding one "&" (ampersand), followed by "fieldName=value".
  For example: **https://go.oncehub.com/PageLink?name=John&email=john@example.com&company=Example**

OnceHub System fields

The following table lists all the supported OnceHub URL parameters (System fields, Custom fields and Booking form instructions) and the recommended character limit for each one.

Field name	***URL syntax****	***Description***	***Recommended character limit***
Name	&name=	The Customer’s name	100
Email	&email=	The Customer’s email	100
Company	&company=	The Customer’s company name	100
Mobile**	&mobile=	The Customer’s mobile number	20
Phone	&phone=	The Customer’s phone number	100
Location	&location=	The location of the meeting	100
Subject***	&subject=	The meeting’s subject	200

Note	&note=	A booking note	200
Customer guests	&customerGuests=	Up to 10 email addresses of Customer guests	200
Subject	&subject=	The meeting's subject	200
Booking page	&bookingPageName=	The Booking page public name	100
Creation time	&creationTime=	Creation time in UTC - JSON format	50
Meeting time	&meetingTime=	Starting date time in UTC - JSON format	50
UTC offset	&utcOffset=	UTC offset in integer	10
{Single-line text field}****	&{field name}=	A 'Single-line text field' custom field	200
{Multi-line text field}****	&{field name}=	A 'Multi-line text field' custom field	200
{Dropdown}****	&{field name}=	A 'Dropdown' custom field. Dropdown values are not case-sensitive.	200
Skip*****	&skip=	A Booking form skipping instruction. This field can take a value of 1 or 0, where 1 means YES and 0 means NO.	

* Field names are not case-sensitive, and you can use any case that will work well with your environment. Spaces must be encoded as "%20"—see encoding below.

** For the **Mobile phone** system field specifically, you cannot include a + symbol, either in encoded or regular form. The mobile phone number **+1-515-276-1565** is encoded as **&mobile=15152761565**. You should not include the + symbol, either in encoded or regular form.

*** The Subject field controls the subject displayed in the Activity stream and on the Calendar event.

**** Custom fields

***** See URL parameters processing rules below

Note:

URLs have different character limits depending on the browser, so you need to make sure you include the most important Custom fields and keep to the recommended character limits described in the table above.

You need to pay special attention to the **Note** and **Multi-line text field** Custom fields, as these fields can easily become large.

OnceHub Custom fields

URL parameters also support Custom fields. You can pass multiple **Custom fields** as URL parameters. To find the field name of your Custom fields,

1. Go to **Setup -> OnceHub setup** in the top navigation bar.
2. Open the lefthand sidebar and open the Booking forms editor.
3. Choose your **Booking form** in the left panel.
4. Expand the **Custom fields** panel in the right panel and locate your Custom field. The URL parameter is shown as the **Name** (Figure 1).

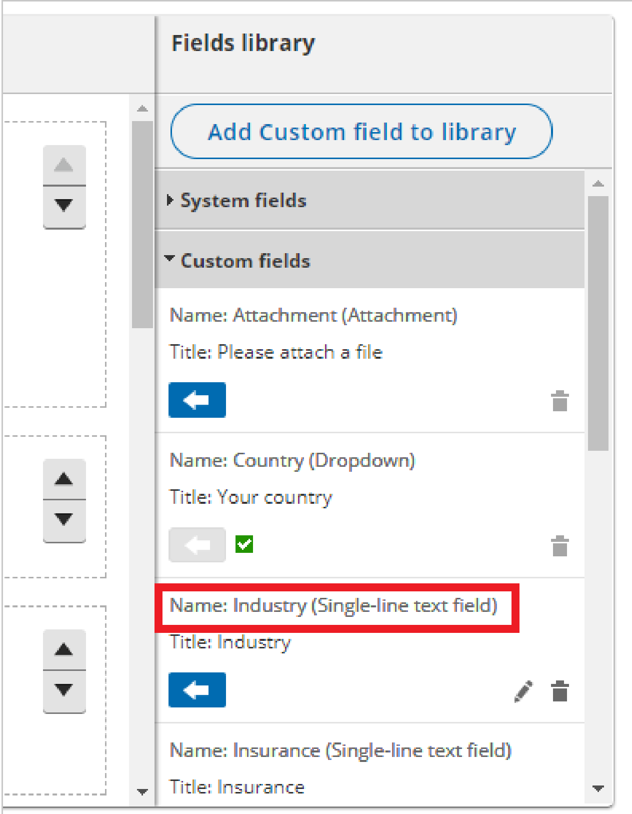


Figure 1: Custom field in the Booking forms editor

5. Add the **Name** to your URL: *"&{OnceHub Custom field Name}={Value}"*.
   For example, a **static** link with a "hobby" custom attribute might look like this: *"&hobby=Basketball".*
   A **dynamic** link might look like this: *"&hobby=*|Hobby|*"*.
6. If you choose to add a **Custom field Name** that contains spaces, you will need to encode the spaces with "%20".

> **Note:**
>
> Only **Single-line text fields**, **Multi-line text fields**, and **Dropdown** fields are supported. Checkboxes and attachments are not supported.

URL parameters processing rules

General rules

- URL parameters that are not supported will be ignored.
- Field names are **not case-sensitive**, i.e. "Skip" will be treated the same as "skip".
  For example, "name" is a reserved word in Wordpress, so you can use Name or NAME instead. Both will work equally in OnceHub.
- Field values are **case-sensitive**, i.e. "John" is different from "john". The exception to this is for **Dropdown** fields, where values are not case-sensitive.
- The order of the URL parameters is not relevant. For example:
  "*?name=John&email=john@example.com*" is the same as "*?email=john@example.com&name=John*"
- Using the "skip=0" parameter (or not using the parameter at all) will mean the Booking form is always displayed.
- When the "skip" parameter is used and the Booking form contains the Mobile phone field with a checked "Enable SMS" checkbox, the SMS notification opt-in option will be displayed when the Customer chooses a time for the booking.
  Booking form skipping can be used with Personalized links, web form integration, and login integration.
  Learn more about SMS notifications

Skipping validation

- OnceHub will check if both the **Name** and **Email** fields were populated using the information provided in the URL.
- OnceHub will check if the **Email** value is a valid email format. If it isn't, the Booking form will be displayed with the pre-populated data and show an email format error message.
- If these validations don't pass, the Booking form will still be displayed with the relevant fields pre-populated. No error messages will appear on the screen except for the email format error message.

Email confirmation field

- The **Confirm your email** field will **not** be displayed when the Booking form is skipped or pre-populated.
- The **Confirm your email** will **not** be displayed when the Booking form was meant to be skipped, but is displayed and pre-populated due to missing required fields.
- You can choose whether to show or hide the Confirm your email field in the Booking forms editor.

Subject field

- It is highly recommended that you customize the **Subject** field or use the default values provided rather than allowing it to be set by the Customer.
- If the **Skip** flag is on and the **Subject** field is not populated, but both the **Name** and **Email** fields are, the Booking form will skip and populate the **Subject** field with a default value:
  - Booking with approval: *Personal meeting*
  - Single session with automatic booking: *Personal meeting*
  - Session packages: *{# of sessions} sessions scheduled*

URL character encoding

URLs can only be sent over the Internet using the ASCII character-set. Since URLs often contain characters outside the ASCII set, the URL has to be converted into a valid ASCII format.

URL encoding replaces unsafe ASCII characters with a "%" followed by two hexadecimal digits. Some characters, such as "at" (@), period (.), dash (-) and underscore (_) are OK, but all URL invalid characters like plus (+) or space ( ) must be URL encoded.

Example 1: All spaces in field names and in field values must be replaced with **%20**.

Example 2: An email with a + in it, like **john+schedule@example.com**, may be shown as **&email=john%2Bschedule%40example.com** in the URL.

A detailed explanation on URL encoding which includes a tool for encoding any text can be found at W3SCHOOL.

Maximizing booking rates in marketing campaigns

Last Modified on Jun 5, 2023

When booking appointments is part of your lead generation or lead qualification marketing campaigns, it's important to optimize your booking rates.

The key to maximizing booking rates in marketing campaigns is to identify leads that did not make a booking in the first place and retarget them with another campaign. We call it the "Retargeting missed bookings" process.

In this article, you'll learn about the process for getting more bookings out of each campaign.

Retargeting missed bookings

The process of retargeting missed bookings involves retargeting leads that did not book with you the first time around. The process is based on two steps: Tagging leads that did make a booking and retargeting leads that did not make a booking.

Step 1: Tag leads that did make a Booking

Create a "Booked" tag

Set up a tag in your marketing app and label it "Booked". You should use this label to mark leads that have made a booking.

Tagging leads that have made a booking helps you identify those who have **not** made bookings later on in the campaign. Some marketing apps, such as MailChimp, provide a different style of tagging called Segments.

Integrate with your marketing app

Tagging missed bookings relies on the ability to push OnceHub Customer information collected at the end of the booking process to a third-party app. Once your third-party app receives the booking information, tag these leads with the "Booked" tag.

You can now find missed bookings by selecting leads that **do not** contain the "Booked" tag.

If you don't use one of our native Salesforce or Infusionsoft integrations, you can use our Zapier integration to bridge between OnceHub and other third-party marketing apps.

Learn more about using Zapier to integrate with email marketing apps

Learn more about using Zapier to integrate with marketing automation apps.

Step 2: Retarget leads that did not make a Booking

Create the "Retargeting missed bookings" campaign

Create an email campaign that will be used to retarget the leads that didn't book in the first campaign (in other words, the missed bookings).

Create the campaign trigger

Define a time-based trigger that will start the missed bookings email campaign several days after the initial campaign was kicked off. This gives the first campaign some time to reach all of your leads and wait for their response before retargeting them with another invitation.

Note:

A time-based trigger is available only in email marketing apps that provide automation or workflow capabilities (for example, **MailChimp**). When your app does not support this capability, you'll need to manually start the second campaign a few days after the first campaign had started.

Run your initial marketing campaign

Run your initial marketing campaign and make sure to monitor your **retargeting missed bookings** campaign.

Note:

You can run this campaign as many times as you need to continuously maximize your booking rates.

Examples of implementing the retargeting missed bookings process

Tracking missed bookings is an important part of maximizing your online booking rates in your marketing campaigns. We have created a set of articles that will help you implement this conversion optimization technique in a number of apps.

- If you are using **MailChimp** as your email marketing app, read the maximizing booking rates using MailChimp and Zapier article.
- If you are using one of our native CRM integrations, read the maximizing booking rates in Salesforce campaigns article or the maximizing booking rates in Infusionsoft campaigns article.

Using Personalized links (URL parameters) in email marketing apps

Last Modified on Jun 5, 2023

Personalized links (URL parameters) are personalized links that include both OnceHub fields and app-specific merge fields. The OnceHub fields are based on URL parameters and the merge fields are replaced with actual Customer data during a marketing campaign such as an email broadcast. These links are different from static Personalized links, which contain an individual's personal details.

In this article, you'll learn about using Personalized links (URL parameters) in email marketing apps.

Using personalized links in email marketing apps

You can use dynamic personalized links in any email marketing app that supports merge fields. In this article, we'll use Mailchimp as our email marketing app.

The use case we'll discuss is sending an email broadcast to all of your Leads inviting them to book a discovery call with you. To do this, you'll create a Personalized link (URL parameters) and place it in your email template.

The link might look like this: *https://secure.OnceHub.com/dana?name=*|NAME|*&email=*|EMAIL|*.*

In this example, the ***|NAME|*** and ***|EMAIL|*** fields are merge fields which are replaced with a single Customer name and email respectively during the email campaign, creating a personalized email for each Lead in our list.

Below is a screenshot from MailChimp's email template editor (Figure 1) showing an email that invites an unqualified Lead to book a phone meeting with a sales representative. The **Schedule a 1-on-1 with me** link is in the body of the email.

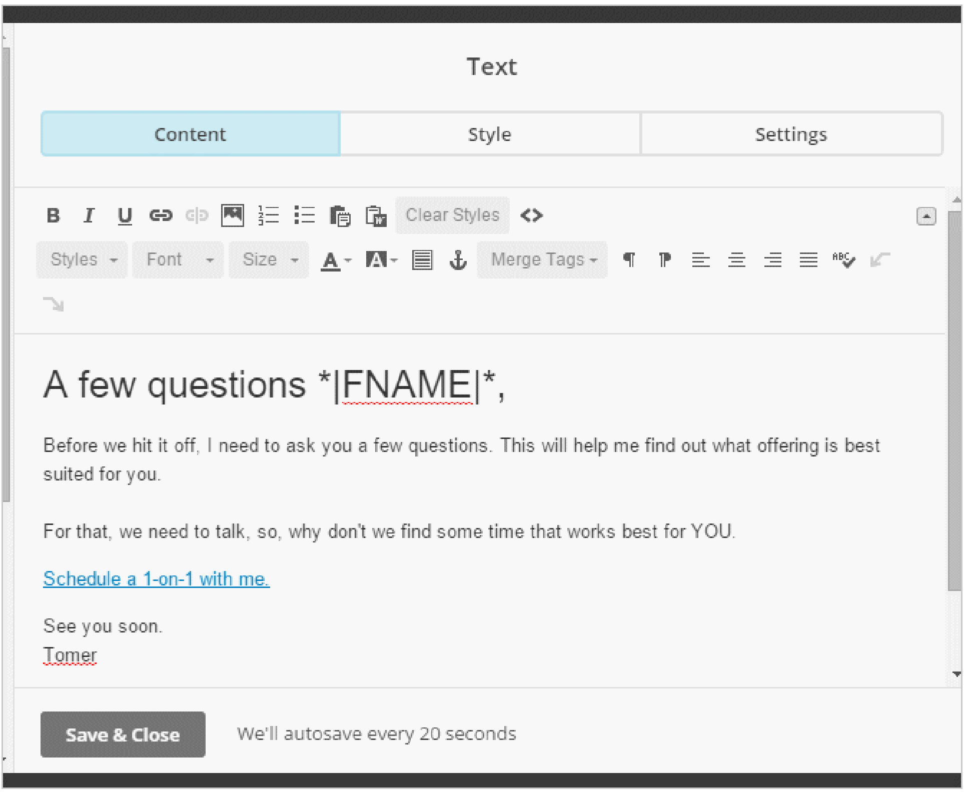


Figure 1: Mailchimp email editor

If we click to edit the link (Figure 2), we will see the dynamic Personalized link with the Mailchimp-specific merge fields, name, email, and subject.

Optimizing your booking rates

When used in email campaigns, Personalized links are a great tool for increasing

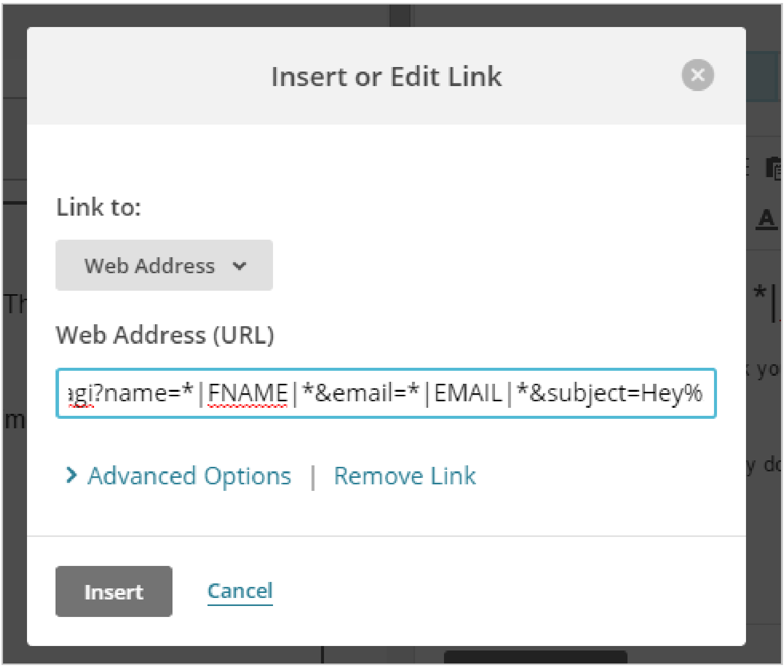


Figure 2: Insert or Edit Link

your phone contact rates during your Lead qualification process. They provide your Leads with the ability to book a discovery call at a time that's convenient for them. But what happens to Leads who don't respond to the booking invitation?

Instead of losing these Leads, we've developed a retargeting missed bookings process, which generates more bookings and increases the campaign's overall booking rates.

Learn more about maximizing booking rates in marketing campaigns

Integrating Personalized links with email apps

Email add-ons integrate your email with email marketing apps or CRMs. One of the key features these add-ons provide is called **Email templates**. These templates include dynamic fields that are replaced with actual Lead and Customer information each time an email is sent out.

By embedding OnceHub's dynamic Personalized links in these templates, you can ensure that each Lead or Customer gets a personalized booking link. You can also add source tracking tags to personalized Booking page links, letting you analyze where your bookings come from. Yesware and its Dynamic templates functionality is an example of how Dynamic personalized links can work in tandem with an email add-on.

Options for sharing your booking links in emails and other apps

Last Modified on May 1, 2023

After setting up your Booking pages or Master pages, you'll need to share them with your prospects and Customers. To access the links available to you, go to the **Share icon** in your top navigation bar (Figure 1) and select **Share a booking link**.

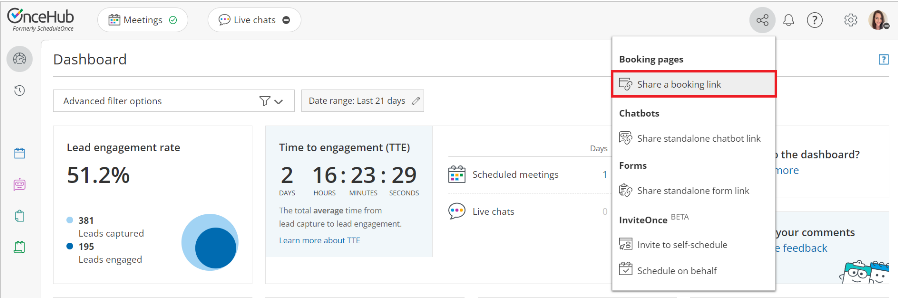


Figure 1: Schedule button

From there, you can grab a Generic link, Personalized link, and/or One-time link.

If you'd like to personalize the link further by adding other URL parameters, go to **Booking pages** in the bar on the left → **Booking page** → **Share & Publish**. Select the **Mail merge** tab. (Figure 2).

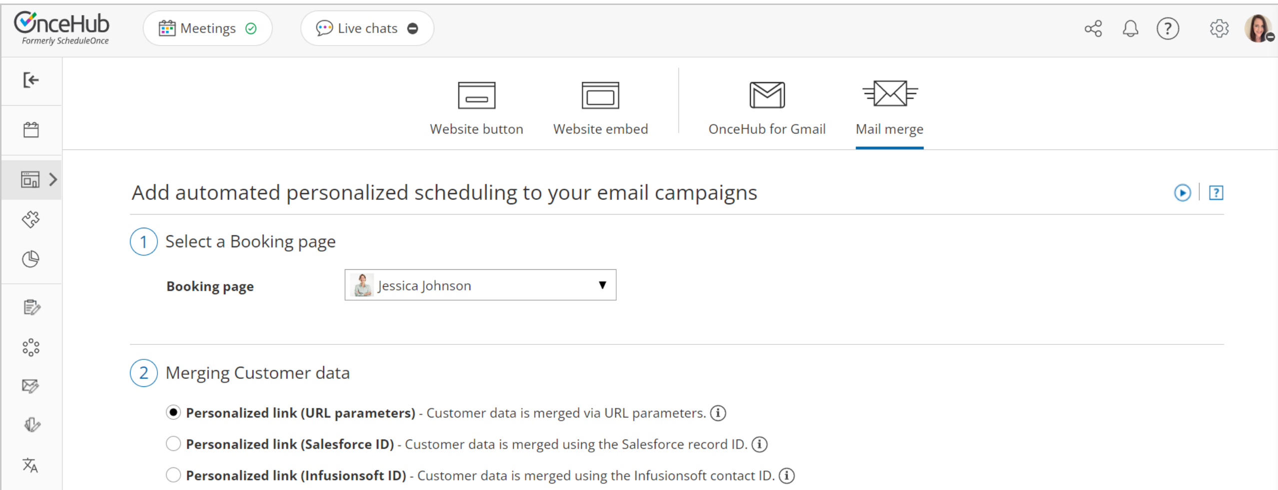


Figure 2: Links on the Mail merge tab

Booking pages can be shared using a **Personalized link (URL parameters)**, a **Personalized link (Salesforce ID)**, or a **Personalized link (Infusionsoft ID)**.

Personalized link (URL parameters)

With Personalized links (URL parameters), prospects and Customers click on your Booking page link and pick a time, without having to provide any information that is already known to you. The Booking form can either be prepopulated with their details or skipped altogether. Personalized links using URL parameters can be sent through any email marketing app that supports merge fields.

When you use this link, you can pass dynamic data via the URL or define a static link specific to a Customer.

Learn more about using Personalized links using URL parameters

Tip:

You can use the OnceHub for Gmail extension to schedule with Personalized links directly from your Gmail account. You can generate Personalized links, copy them in a single click, and send them in an email.

Learn more about OnceHub for Gmail

Personalized link (Salesforce ID)

When you schedule with existing Salesforce Leads, Contacts, Person Accounts, or Case records, you can use our Personalized links (Salesforce ID) in your Salesforce buttons, Salesforce email templates, or email form to automatically recognize Customers based on their Salesforce Record ID.

Learn more about using Personalized links using Salesforce IDs

Personalized link (Infusionsoft ID)

When scheduling with your existing Infusionsoft Contact base, you can use our Personalized links (Infusionsoft ID) in your Infusionsoft email and broadcasts to automatically recognize the Contact based on their Infusionsoft record ID.

Learn more about using Personalized links with Infusionsoft IDs

Introduction to web form integration

Last Modified on Jun 5, 2023

Note:

OnceHub now offers forms with advanced functionality and conditional logic. This is a much simpler and more powerful method than the feature described below and may work better for your scenario.

Learn more about OnceHub advanced forms

Getting started with forms

With web form integration, you can choose to provide scheduling to every prospect who fills out your lead generation form, or only to prospects who meet certain criteria. When your web form is integrated with OnceHub, your Customers will be able to schedule a meeting immediately after submitting a form.

Web form integration is a flexible feature that can be configured to fit your specific business case. Scheduling is the ideal contact method for your serious prospects who are ready to engage. It is best used in two use cases:

- To offer scheduling only to your top leads. In other words, when you want to segment prospects based on their web form choices.
- To offer scheduling to all prospects who fill out your form.

Since prospects have already provided their details in your web form, they won't have to do so again in the Booking form. Customer data is passed from your web form directly to OnceHub, allowing you to offer Customers a quicker scheduling experience.

In this article, you'll learn about the key concepts to consider when integrating your web form with OnceHub.

All prospects versus top prospects

Running an effective lead generation campaign often requires a separate flow for each type of lead.

For example, you might want to offer a scheduling option only to large enterprises, as they have a higher potential of becoming high-value Customers. To achieve this, you need to set up web form rules or conditions that will use the lead's selections to redirect them to a dedicated Thank you page which includes a scheduling option.

If you're using Wufoo as your web form, you can use a feature called Form Rules to choose where your prospects go after submitting their form. This feature provides the ability to set redirection rules based on form field conditions. You can use this feature to set up multiple Thank you pages and redirect your top prospects to a specific page that includes the scheduling option.

Publishing methods

Web form integration can be used with the Website embed and Website button publishing methods.

Website embed

When you use the Website embed publishing method, your Customers will be asked to choose a time for the meeting immediately after completing the form. With this method, scheduling appears as an integral part of the lead generation flow.

Learn more about Website embed

Website button

When you use the Website button publishing method, your Customers will see a scheduling button on the Thank you page. This allows them to actively choose to make a booking. When the Customer clicks the button, it indicates that they are more engaged and more committed to the booking process. This positively affects the booking conversion rate.

Learn more about Website button

Web form type

If you're considering integrating a web form with OnceHub, you'll need to decide on the type of web form to use:

- A third-party web form app (such as Wufoo).
- A third-party landing page app.
- A web form that is part of a marketing automation app (such as Infusionsoft web forms).
- A web form that you build in-house.

If you use a web form or landing page app, you'll need to make sure that the form can pass the submitted data via URL to the selected Thank you page. Some web form apps support this functionality out-of-the-box (for example, Wufoo's Templating feature), but some applications do not. If the web form app does not support this functionality, you'll either need to write some code (server-side or Javascript) to collect and pass the form data through to OnceHub, or build a web form from scratch that includes this functionality.

Integration method

Passing form data via URL is key to making a web form integration with OnceHub work. OnceHub supports two methods of web form integration, using **URL parameters** and using **CRM record IDs**.

Web form integration using URL parameters

Web form integration using URL parameters refers to passing booking form data via URL to OnceHub . In order for OnceHub to extract the relevant information from the URL and populate the correct booking form fields, the URL attributes must match OnceHub field names. This method is supported by third-party web form apps such as Wufoo.

Learn more about Web form integration using URL parameters

Web form integration using CRM record IDs

Web form integration using CRM record IDs refers to passing a record ID via URL, making an API call to an integrated CRM app to retrieve the customer's information, and using it to populate the Booking form. This method is supported out-of-the-box by Infusionsoft.

Integrating your web form with OnceHub using URL parameters

Last Modified on Oct 13, 2022

If you want to integrate your web form with OnceHub, you'll need to set up your web form to redirect to an external URL and include the submitted form data in the URL.

The URL should be either a standalone Booking page (e.g. https://go.oncehub.com/dana), or a custom Thank you page with a website integration option on it (for example, a Website button or Website embed). The submitted form data must be formatted to match our supported OnceHub URL parameters.

In this article, you'll learn about integrating your web form with OnceHub using URL parameters.

> **Note:**
>
> This article describes how to send information from your web form to a OnceHub Booking page. It's also possible to redirect booking confirmation data from your OnceHub Booking form to a web form using URL parameters.

Using URL parameter with web form apps

There are many web form apps available on the market, but only a few of them support the URL parameters functionality. Most often, you will find this functionality in the **Notifications** section of your web form. In this article, we use Wufoo to describe the steps required to integrate your web form with OnceHub, but the same steps should apply to any web form which is capable of supporting URL parameters. Some other web forms that support this functionality include 123FormBuilder and GravityForm.

Requirements

To integrate your web form with OnceHub, you must ensure that the web form can pass parameters to the Thank you page.

Copying the Website embed or Website button code from OnceHub

1. Go to the **Schedule button** in the top navigation menu and select **Publish on your website**.
2. Select the publishing option you will add to your Thank you page.
    - Website embed: This option displays your Booking page as an integrated part of your web page.
    - Website button: Clicking the button displays your Booking page in a lightbox on top of your web page, or in a new browser tab.
3. In the **Select a Booking page** step, select the page you want to integrate with your web form (Figure 1).

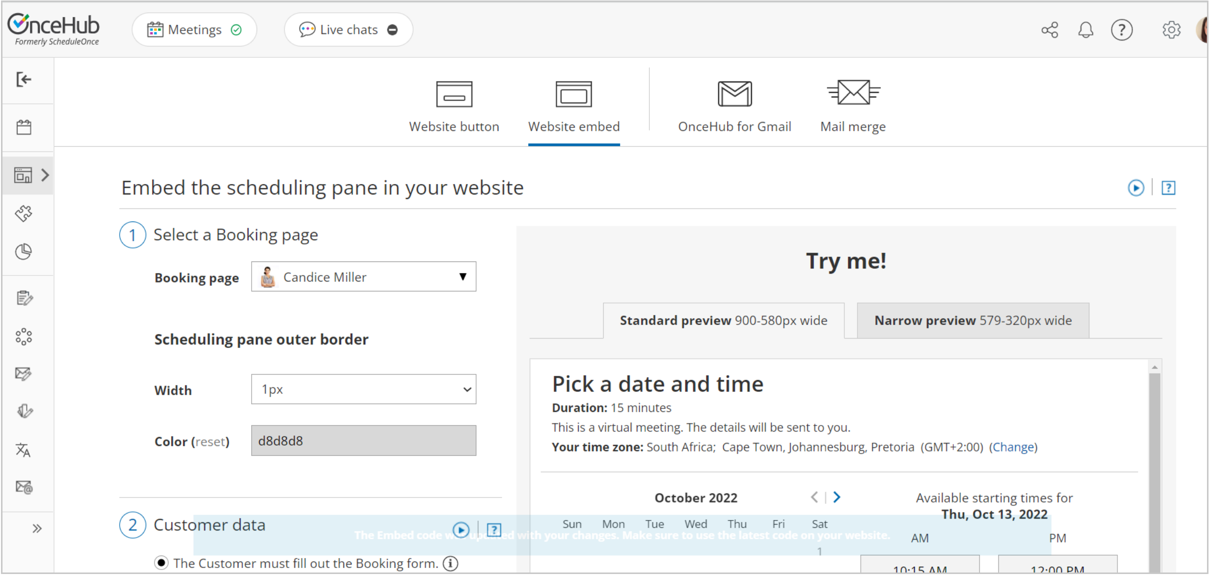


Figure 1: Select a Booking page step

4. Select **Customer data is passed via URL parameters** from the **Customer data** step.
5. In the **Booking form** step, you can select one of the two options below:

   - **Skip the Booking form:** Skipping the OnceHub Booking form helps you maximize your booking conversions and provides your Customers with a quicker booking process.
   - **Prepopulate the Booking form:** The data is visible in the Booking form and can be edited by the Customer before submission. Learn more about prepopulated Booking forms

6. Click **Copy code** to copy the code to your clipboard.

Creating a Thank you page

In this step, you'll need to create a Thank you page where your prospects will be redirected to after filling out and submitting your form. Most web form apps provide a Thank you page that you can customize. However, you might want to use your own Thank you page, which sits on your branded website or on an external landing page builder app.

On your Thank you page, paste the OnceHub Website embed or Website button code that you copied in the steps above. You should paste the code where you want the publishing option to show.

Sending the web form data to the Thank you page via URL

This is the most important part of the process. Follow the steps below to complete the integration:

1. **Redirect the web form to your Thank you page:** When the form is submitted, it needs to redirect to the Thank you page you set up earlier. For example, if you're using **Wufoo**, you can use a feature called Form Rules to define the form submission redirect URL.
2. **Pass web form data to the Thank you page URL:** In addition to redirecting to the Thank you page, you'll need to configure how the web form passes data in the URL to make sure that all Booking form data is added to the URL.
3. **Match web form data to OnceHub supported fields:** To be able to use the web form data in OnceHub, you need to make sure the right fields are passed to OnceHub. Only supported fields are processed.
   Most modern web form apps provide **field mapping** functionality, which allows you to change the names of

the web form fields when passing them via the URL. For example, if you're using Wufoo, you can map Wufoo fields to third-party app fields using a feature called Templating.

4. To add more URL parameters to the code, check the OnceHub URL parameters article.

Congratulations! You have integrated OnceHub with your web form.

Options for integrating web forms with Salesforce and OnceHub

Last Modified on Jun 5, 2023

When your web form is integrated with OnceHub, your Customers will be able to schedule meetings immediately after submitting a lead generation form. Web form integration is used primarily to provide a unique scheduling experience for different types of prospects.

Since prospects have already provided their details in your web form, they will not have to do so again in the Booking form. Customer data is passed from your web form directly to OnceHub, allowing you to offer Customers a faster scheduling experience.

Note:

For security and privacy reasons, using CRM record IDs to skip or pre-populate the Booking form is not compatible with collecting data from an embedded Booking page or redirecting booking confirmation data.

Web forms can be created with web form apps such as Formstack, Wufoo, or FormAssembly, or when using marketing automation apps such as Hubspot, Eloqua, or Marketo. You can integrate your web form with Salesforce and with OnceHub.

Important:

The native Salesforce Web-to-Lead form does not allow you to update existing records and always creates new leads asynchronously. Lead records will be created within 24 hours and duplicate records may be added to your Salesforce organization.

When redirecting your Web-to-Lead form to a OnceHub booking page, Customers submit the form and make a booking. OnceHub will update or create Lead records based on the Customer's email address. Since the creation of leads is asynchronous, OnceHub might not find the related Lead record in your Salesforce organization and create a new Lead record, resulting in duplicate records.

It is recommended to use other Web form applications to create or update Leads in your Salesforce organization in real time rather than using the native Salesforce Web-to-Lead form functionality.

The following options should be considered when integrating Salesforce, OnceHub, and your Web form application.

Integrating your Web form with OnceHub and Salesforce using Record ID

In this case, your Web form creates or updates records in Salesforce and then the Record ID is passed to a Thank you page. When integrating your Web form with OnceHub, the Customer is redirected to a Thank you page that includes the OnceHub button or Website embed. This is the recommended approach and enables you to avoid duplication of records in your Salesforce organization.

When the form is submitted:

1. The Web form app creates or updates Salesforce records based on the email address provided by the Customer in the form.
2. The Salesforce Record ID is sent to the Web form application via the Salesforce API and then passed to

OnceHub.

3. The Customer is redirected automatically to a Thank you page with an embedded Booking page or Website Button that leads to a Booking page. The Customer can make booking without having to provide any additional information.
4. OnceHub identifies the Customer in your Salesforce organization based on the Salesforce Record ID received from the web form application.
5. OnceHub adds an event to the Salesforce record and updates the record based on your setup options via the Salesforce API.

Learn more about Using Salesforce Record IDs to personalize scheduling in landing pages

Integrating your web form with OnceHub and Salesforce using URL parameters

If you integrate your web form with OnceHub and Salesforce using URL parameters, the Customer is always identified via their email address. After completing the web form, the Customer is redirected to a Thank you page using URL parameters.

When the form is submitted:

1. The web form app creates or updates Salesforce records based on the email address provided by the Customer in the form.
2. The Customer's information is passed to OnceHub using URL parameters.
3. The Customer is redirected automatically to a Thank you page using URL parameters to make a booking without having to provide any additional information.
4. OnceHub identifies the Customer in your Salesforce organization based on the email address received from the web form application.
5. OnceHub adds an event to the Salesforce record and updates the record based on your setup options via the Salesforce API.

Learn more about integrating your web form with OnceHub using URL parameters

Note:

When duplicate records are found, OnceHub will always update the most recent record in your Salesforce organization. This means that in nearly all cases, the activity will be correctly added to the record that is created or updated via your web form.

Integrating with Infusionsoft web forms

Last Modified on Feb 28, 2023

When your Infusionsoft web form is integrated with OnceHub, your Customers will be able to schedule meetings immediately after submitting the form. They are redirected to a Booking page or Thank you page. The Customer can then pick a time to schedule the booking without having to provide any additional information. The appointment is then scheduled and added to the Infusionsoft Contact.

In this article, you'll learn about integrating OnceHub with Infusionsoft web forms.

Benefits of integrating OnceHub with Infusionsoft web forms

When you create an Infusionsoft Campaign, you can define goals for your Infusionsoft Contacts. A goal can be achieved when an Infusionsoft Contact submits a web form.

After the form is submitted, Infusionsoft can automatically pass the Contact ID to a redirect page. Recognizing the Customer by the Infusionsoft Contact ID provides two key benefits:

- On the User side, it eliminates any chances of updating the wrong record.
- On the Customer side, it allows you to prepopulate the Booking form step with Infusionsoft record data or completely skip the Booking form step. This eliminates the need to ask Customers for information you already have, improving conversion rates and moving leads through the funnel with speed and efficiency.

Redirecting options

Contacts can be automatically redirected to a Booking page link, an Infusionsoft thank you page, or a custom landing page. In all cases, your Customer will be able to pick a time to schedule the booking without having to provide any additional information. The appointment is then scheduled and added to the Infusionsoft Contact.

> **Note:**
>
> For security and privacy reasons, using CRM record IDs to skip or pre-populate the Booking form is not compatible with collecting data from an embedded Booking page or redirecting booking confirmation data.

Redirecting to a Booking page

1. Go to **Booking pages** in the bar on the left → **Booking page → Share & Publish**.
2. In the **Mail Merge** section, use the drop-down menu to select the Booking page or Master page that you want to create a link for (Figure 1).

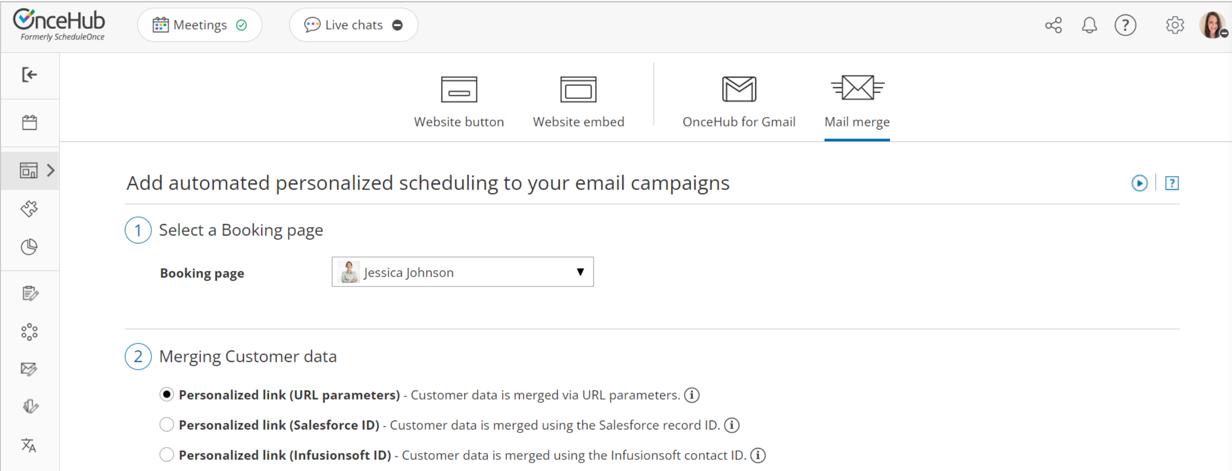


Figure 1: Select Booking page

3. In the **Customer data** step, select **Personalized link** (Figure 2).

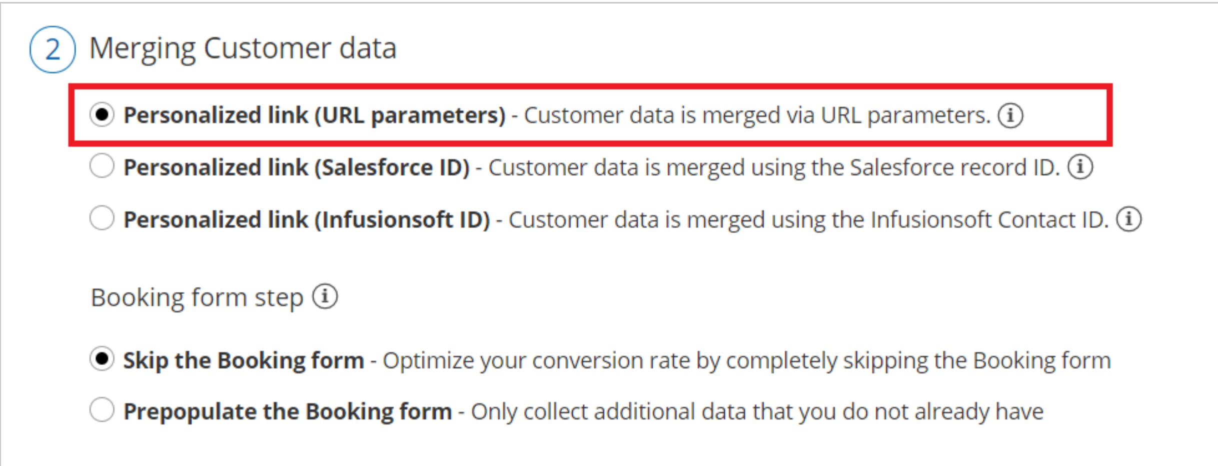


Figure 2: Customer data step

4. Click the **Copy link** button to copy the link to your clipboard. If you want to skip the Booking form step, when you paste the link you should add the soskip parameter to the link: http:// go.oncehub.com/johnsmith?soskip=1.

Figure 3: Copy link

5. In Infusionsoft, go to **Marketing → Campaign builder**.
6. Open an existing campaign or create a new one.
7. In the campaign builder, click and drag the **Web form submitted** goal onto the campaign canvas.

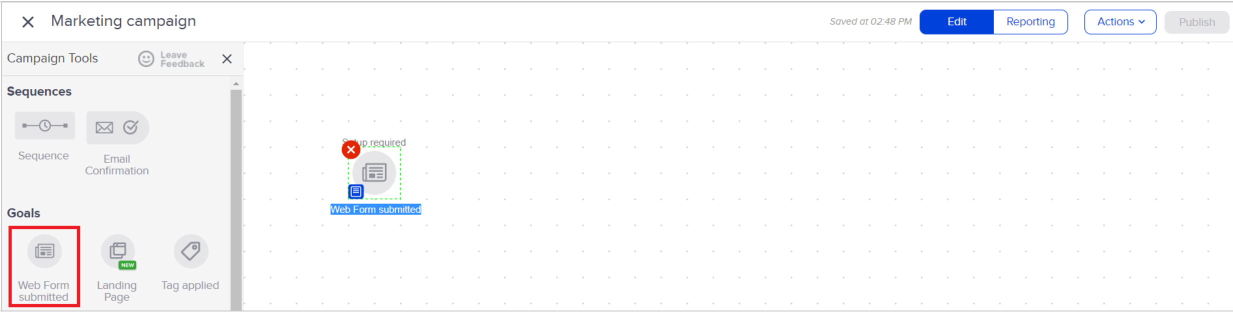


Figure 4: Infusionsoft campaign builder canvas

8. Double-click the **Web form submitted** goal to configure the web form.
9. In the **Thank-you page** tab, select **Web address** from the drop-down menu.
10. Copy and paste the Booking page link into the **URL field** (Figure 5).

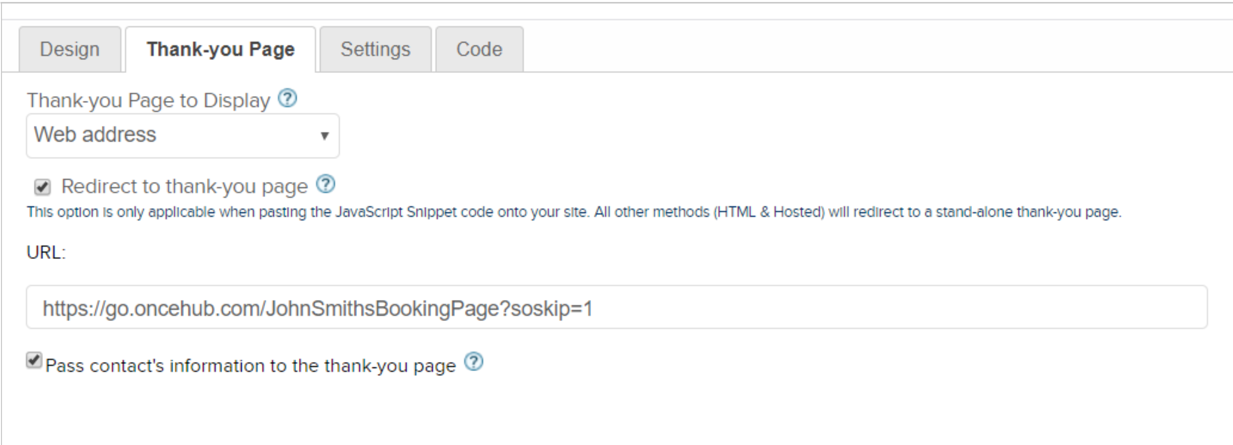


Figure 5: Thank-you page tab

11. Check the **Pass contact's information to the thank-you page** check box to automatically pass the Contact ID to the Booking page.
12. Click the Back arrow to return to the Campaign Builder.

Note:

You can also create Personalized links (Infusionsoft ID) to send to specific Customers.

Redirect to an Infusionsoft Thank you page

When you redirect to an Infusionsoft Thank you page, the Infusionsoft Contact ID is passed automatically to the Website embed or Website button placed on your landing page.

1. Go to **Booking pages** in the bar on the left → **Booking page → Share & Publish**.
2. In the **Website embed** tab, select the Booking page or Master page you want to embed on your website (Figure 6).

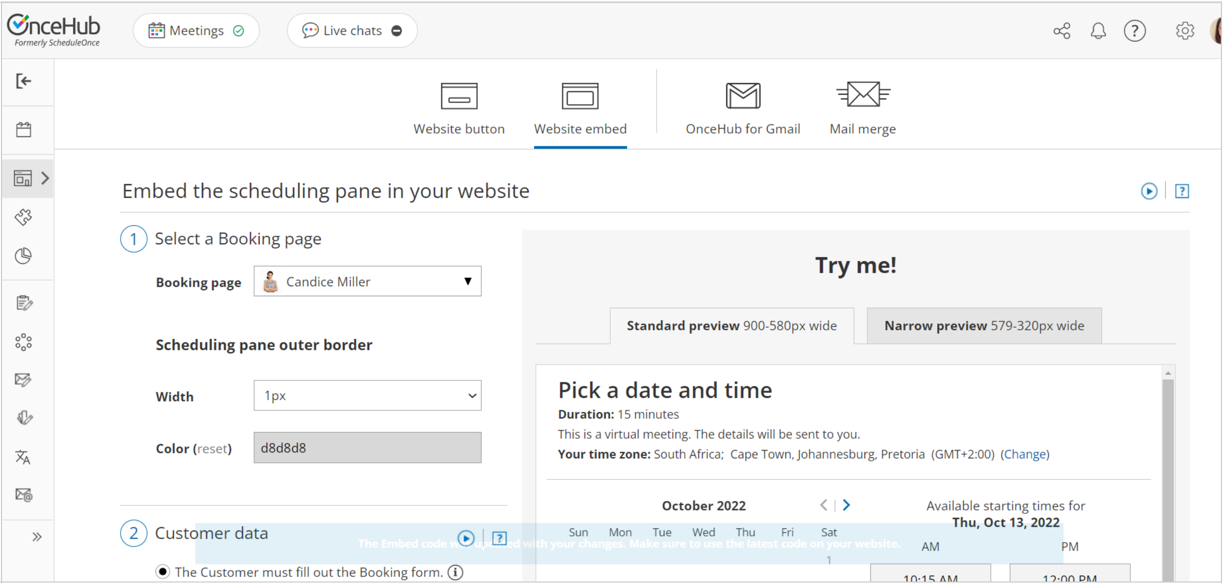


Figure 6: Select a Booking page step

3. Use the **Width** drop-down menu to select the width of the Scheduling pane outer border.
4. Use the **Color** option to change the color of the border.
5. In the **Customer data** step, select to have Customers fill out the Booking form, or select a web form integration option.
6. Select whether you want to **Skip the Booking form** or **Prepopulate the Booking form**.
7. Click the **Copy** button to the copy the code to your clipboard.
8. In Infusionsoft, go to **Marketing → Campaign builder**.
9. Open an existing campaign or create a new one.
10. In the Campaign builder, click and drag the **Web form submitted** goal onto the campaign canvas.
11. Double-click the **Web form submitted** goal to configure the web form.
12. In the **Thank-you page** tab, select **Thank-you page** from the drop-down menu.
13. In the **Snippets** snippets tab (Figure 7), click and drag the HTML snippet onto the Thank-you page **.**

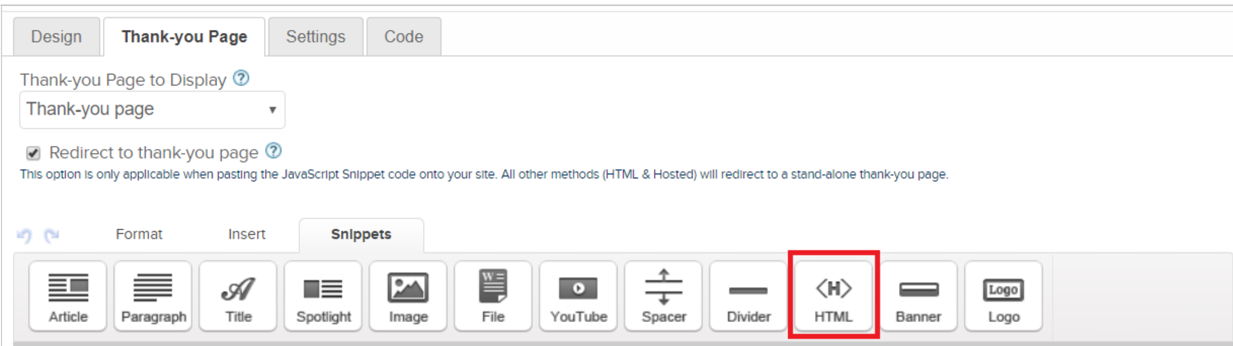


Figure 7: Thank-page Snippets tab

14. Add the Website embed code to the snippet. If the Infusionsoft HTML snippet reformats the embed code, you will need to add the code below to display the embed correctly. In the code below, replace the following information:

   - Replace BOOKING_PAGE_LINK with your Booking page link or Master page link, without the domain. Example: use just "TestPage" if your full link is https://go.oncehub.com/TestPage.
   - To skip the Booking form, add the OnceHub parameter soSkip=1
   - To pass the Infusionsoft contact ID, add the OnceHub parameter soisContactID=~Contact.Id~

```
<!-- ScheduleOnce embed START -->
```

```
<div id ="SOIDIV_test" data-so-page="BOOKING_PAGE_LINK&soSkip=1&soisContactID=~Contact.Id~&em=1" data-height="550" data-style="border:1px solid #d8d8d8; min-width: 290px; max-width:900px;" data-psz="01"></div>
<script type="text/javascript" src="https://cdn.oncehub.com/mergedjs/so.js"></script>
<!-- ScheduleOnce embed END -->
```

15. Then, click **Save**.

To test your Thank-you page, click the **Test** button.

Redirect to a custom landing page

The Infusionsoft Contact ID is passed automatically to a Website embed or Website button placed on your landing page. If you want to pass the OnceHub parameter soSkip, you can add ?*soSkip=1* to your landing page link.

1. In the **Thank-you page** tab, select **Web address** from the **Thank you page to display** drop-down list.
2. Copy and paste your Landing page link into the **URL field**.
3. Add ?soSkip=1 to your landing page link. Your link will look like this: http://www.example.com?soSkip=1
4. Check the **Pass contact's information to the thank-you page** check box to automatically pass the Contact ID to the Booking page.

Important:

If the Website embed or Website button code was placed on your webpage was added prior to November 7, 2015, you will need to replace it with the updated OnceHub code.

Sign in to your OnceHub account,

- Go to **Booking pages** in the bar on the left → **Booking page → Share & Publish**. Select the **Website embed** or **Website button tab**. In the **Customer data** step, select **Customer data is passed using the Infusionsoft Contact ID** (web form integration). Then, copy and paste the embed or button code in your landing page.

Using the web form as a filter

Last Modified on Jun 5, 2023

In some cases, you may want to allow Customers to schedule only if certain conditions that you specify are met. For example, you might want to stop a returning Customer from making more than one booking, or ensure that they provide data in a certain format before they're allowed to make a booking.

By placing a web form at the beginning of the scheduling process, you can use the form as a gatekeeper. The form can provide an additional layer of logic to filter out Customers.

Customer data is passed from your web form directly to OnceHub. Prospects provide their details in your web form and OnceHub will use this data to prepopulate the Booking form.

Here are some examples of business cases using the web form as a filter.

Allowing a single booking per Customer

You can prevent your Customers from scheduling with the same email or IP address more than once. This ensures that each Customer can only schedule a single booking. Learn more about using web forms to only allow one booking per Customer

Password-protected Booking page

You can keep your Booking page private by requiring a password to make a booking. Learn more about creating a password-protected Booking page

Validate data received from your Customers

You can make sure your Customers provide their information in the appropriate format. For example, you may want to ensure their phone number includes only digits. Learn more about validating data received from your Customers

Using web forms to allow only one booking per customer

Last Modified on Jun 5, 2023

In some cases, you may want to ensure that Customers can only make a single booking. For example, you may offer a free consultation to new prospects, but you don't want people to exploit this and request multiple bookings. By restricting Customers to a single booking, you can control the time and resources you spend with each of your prospects and prevent accidental duplicate bookings.

In this article, you'll learn about using web forms to allow only one booking per Customer.

Using your web form as a gatekeeper

When you place a web form at the beginning of the scheduling process before your Booking page, you can use the form as a gatekeeper. The form will filter out Customers that have already made a booking and prevent them from continuing to OnceHub. Customers who are making their first booking won't have to provide any details that they have already provided on the form. Learn more about web form integration

Different third-party forms and custom forms provide this logic in different ways. Typically, the form can filter customers based on a duplicate Customer email address, custom field, or an IP address. We'll look at a typical solution using Wufoo forms.

Requirements

To integrate your web form with OnceHub, you must ensure that the web form can pass URL parameters to the OnceHub Booking page.

In the examples below, your Wufoo form will act as the gatekeeper to your Booking page. Your web form should include the Customer name and email fields and pass their content to OnceHub using Wufoo's templating feature.

Restricting bookings based on a Customer email address

1. In Wufoo, select the webform that you want to edit.
2. Select the **Field settings** tab.
3. In the preview pane on the right, select the **Email** field.
4. In the **Field settings** pane on the left, check the box marked **No Duplicates** (Figure 1).

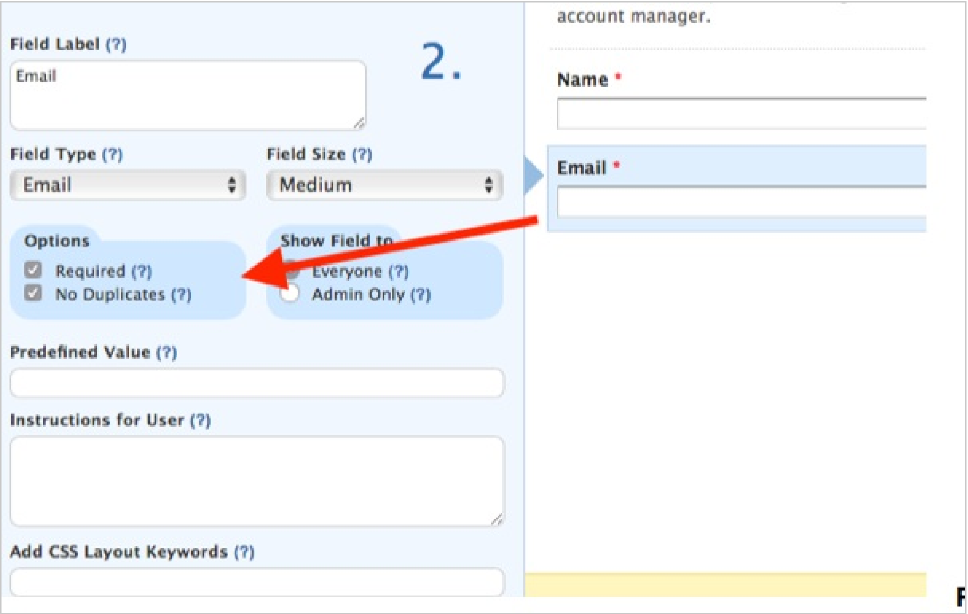


Figure 1: No Duplicates option

5. Click **Save**.

If required, you can also use the **No Duplicates** option on other fields such as the **Phone Number** field.

Restrict bookings based on a Customers IP address

1. In Wufoo, select the webform that you want to edit.
2. Select the **Form settings** tab.
3. In the **Limit Form Activity** section, check the box marked **Allow Only One Entry Per IP** (Figure 2).

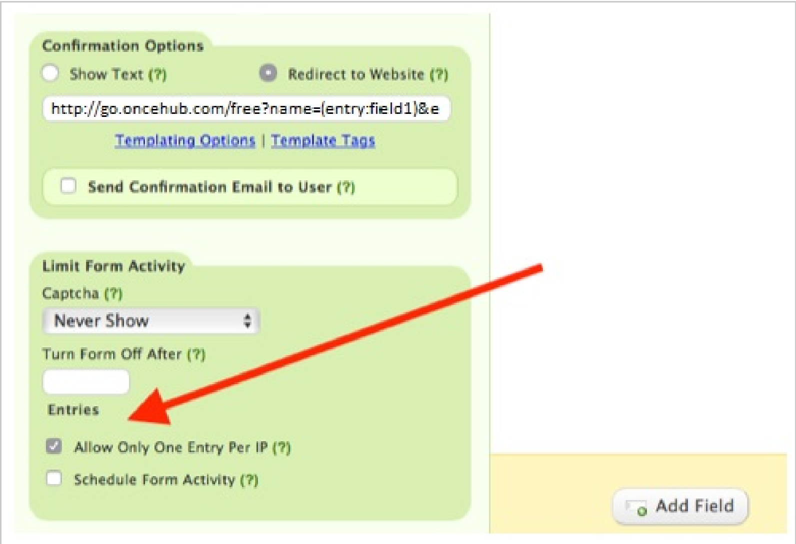


Figure 2: Allow Only One Entry Per IP option

4. Click **Save**.

Your Wufoo form is now configured to allow one booking per Customer. Next, you can use one of the Wufoo sharing options to invite your Customers to schedule. You should not share your OnceHub Booking page link directly with your Customers as this will bypass the Wufoo form step.

How to create a password-protected Booking page

Last Modified on Jun 5, 2023

If you don't want your OnceHub Booking page to be available to the general public, you can put a form in front of your Booking page to act as a "gatekeeper". When your Customers access the Booking page, they will be prompted to provide a password before the form is displayed.

Some third-party forms and custom forms can require a password. To protect your Booking page with a password, ensure that you're using web form integration and that your lead generation form provides this functionality.

In this article, you'll learn about creating a password-protected Booking page.

Why would I need to create a password-protected Booking page?

You may offer appointments to a specific company and don't want non-employees to be able to schedule. By protecting your Booking page with a password, you can selectively provide the password only to those Customers who should be allowed to access it.

Password protection also acts as an additional layer of security.

Creating a password-protected Booking page

In this example, your Wufoo form will act as the "gatekeeper" to your Booking page.

1. Integrate OnceHub with your Wufoo form using URL parameters
2. In Wufoo, create a new form or edit an existing form. Ensure that your Wufoo form includes the **Customer name** and **Email** fields.
3. Use Wufoo's templating feature to pass the field content to OnceHub.
4. In the Wufoo **Form Manager**, hover over your form and click the **Set password** button (Figure 1).

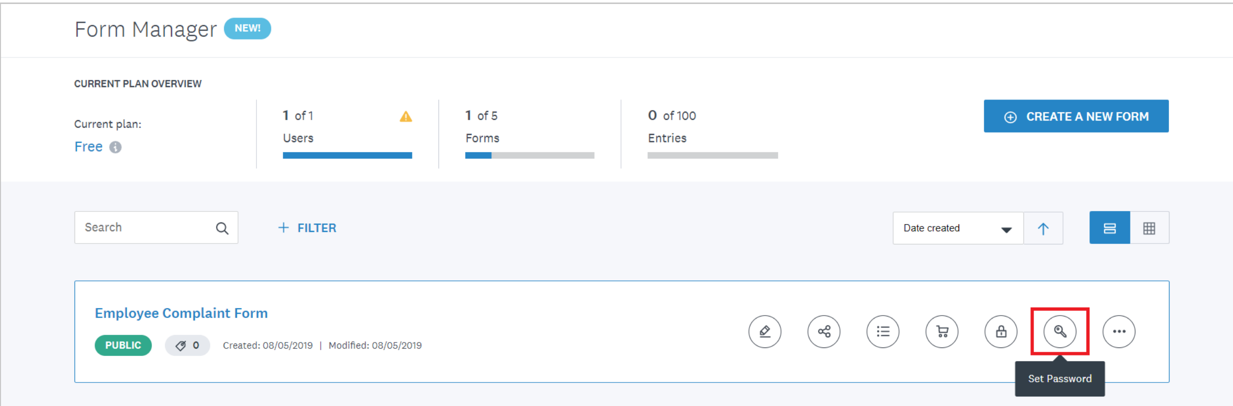


Figure 1: Wufoo Form Manager

5. Enter a password for the page and save the changes.

Your Wufoo form is now configured to ask Customers for a password before the form can be displayed.

You should use one of the Wufoo sharing options to invite your Customers to schedule. Make sure to provide your Customers with the password.

Your Customers will be able to enter the password, fill out the form, and make a booking without having to fill out the OnceHub Booking form.

Important:

Don't share the OnceHub Booking page directly with your Customers as this will bypass the additional logic from the Wufoo form step.

Validating data received from your Customers

Last Modified on Jun 5, 2023

In some cases, you'll need to validate the type of data input provided by your Customer. To validate data received from your Customers, you can use web form integration and place a lead generation form in front of the Booking page. The form will act as a "gatekeeper" and force Customers to provide the correct data format before passing the data to OnceHub. Most third-party forms and custom forms can provide this kind of data validation.

For example, you might ask Customers for their date of birth and want to make sure they use a valid date format. In this example, your Wufoo form will act as the gatekeeper and will collect dates of birth using a valid date format. It should also use the Customer name field and email field, passing their contents to OnceHub using Wufoo's templating feature.

Validating the date of birth field on your Booking form with Wufoo forms

1. Integrate OnceHub with your Wufoo form using URL parameters.
2. In the Wufoo **Form manager**, create a new form or edit an existing form.
3. In the **Add a Field** tab, click the **Date** field to add it your form (Figure 1).

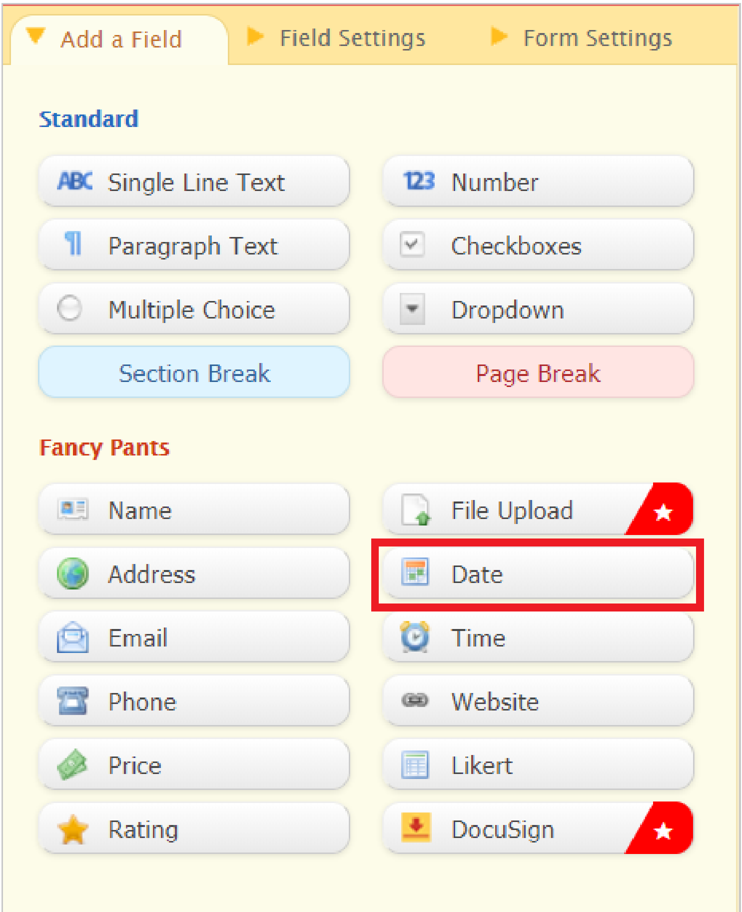


Figure 1: Add a Field tab

4. In the **Field settings** tab, you can edit the field label to be "Date of birth". You can also edit the date format.
5. Click **Save Form**.

Your Wufoo form is now configured to validate the Booking form data.

The next step is to use web form integration to pass the data from Wufoo to OnceHub. The same concept can be used to validate other types of data.

Important:

You should use one of the Wufoo sharing options to invite your Customers to schedule. Don't share the OnceHub Booking page directly, as this will bypass the additional logic from the Wufoo form step.

Introduction to Analytics and Source tracking

Last Modified on Jun 5, 2023

After setting up your Booking pages or Master pages, you'll need to share them with your prospects and Customers. In this section, you will learn how to Personalize links with dynamic parameters.

Using OnceHub with source tracking (UTM tags)

Source tracking helps you understand your audience better by tracking the various sources of your bookings. By adding tags to the specific URLs that you share in different places online, you can analyze which marketing campaign or outreach effort results in more bookings.

Learn more about using OnceHub with source tracking (UTM tags)

Using OnceHub with web analytics

Leads can be driven to your OnceHub Booking pages from multiple online sources. For example, you might receive OnceHub bookings from mass emails, social media, and pay per click (PPC) advertising. Tracking which campaign has generated the most bookings can help you focus on the campaigns that matter.

Learn more about using OnceHub with web analytics

Using OnceHub with source tracking (UTM tags)

Last Modified on Oct 12, 2022

Source tracking helps you understand your audience better by tracking the various sources of your bookings. By adding UTM tags (sometimes called UTM parameters or UTM code) to the specific URLs that you share in different places online, you can analyze which marketing campaign or outreach effort results in more bookings.

For example, you might add a source tracking tag to the URL that you share with Customers via email marketing campaigns, but add a different source tracking tag to the URL that you publish on banner ads. By adding different UTM tags to URLs that you use in different contexts, you can track how many bookings are generated from each source, allowing you to focus your marketing resources on the most effective strategies for your business. OnceHub enables you to use source tracking in combination with Google Analytics or another third-party analytics tool.

If you're using a chatbot installed on your website or providing a general link for booking pages (https://go.oncehub.com/YourLink), OnceHub stores the data for UTM tags used to access this page. You can access this data in the **Details** pane of your Activity stream (see below for details).

If you'd prefer to integrate booking pages into your own website and share a link to your website rather than a general link, you can still use UTM tags for this by redirecting to your own landing page or custom confirmation page. OnceHub allows source tracking for any of our Sharing and Publishing options. However, OnceHub does not store the data internally for those UTM tags.

In this article, you'll learn about UTM tags and how to enable source tracking.

UTM tags

UTMs (Urchin Tracking Modules) were originally created by Urchin Software (acquired by Google in 2005) as a tagging system for URLs. They have become one of the most widely used source tracking conventions for marketing analytics and are a powerful tool to incorporate in any data-driven marketing strategy.

The five standard UTM tags are:

- utm_source: used for identifying the traffic source.
- utm_medium: used for identifying the delivery method.
- utm_campaign: used for keeping track of different campaigns.
- utm_term: used for identifying keywords.
- utm_content: used for split testing or separating two ads that go to the same URL.

Learn more about UTM tags

Note:

The five standard UTM tag names are reserved terms in OnceHub, and cannot be used as Custom field names.

UTM structure

UTM tags are added to the end of the URL, with the following syntax:

1. Add "?" to the end of the URL.
2. Add "=" followed by the value of each tag as defined according to your marketing analytics strategy.
3. Add "&" to separate each parameter.

For example, here's an example booking page link with some UTM tags added:
https://go.oncehub.com/EXAMPLEBOOKINGPAGE**?**
utm_source=newsletter1**&utm_medium=**email**&utm_campaign=**conference

View UTM tag activity through the Activity stream

If you're using a chatbot installed on your website or sending your customer a general link (https://go.oncehub.com/YourLink), OnceHub tracks UTM tags added to the URL automatically. You don't need to update your configuration within OnceHub; just add the UTM parameter(s) to the URL you provide to people scheduling with you.

For example, if you have installed a chatbot on your website, the link you use in a Google Ad may be:
https://www.yourwebsite.com?**utm_source=**google**&utm_medium=**cpc**&utm_campaign=**summer_sale

You can view UTM tag activity within the Details pane of your Activity stream.

Monitor effectiveness of campaigns with custom filters

To monitor the effectiveness of a campaign over time, you can save a custom filter for a specific campaign. With a custom filter, you can access the data quickly and easily.

Either view the activity within OnceHub's Activity stream, share the custom filter with a colleague, or export the filter's activity to analyze the data on your end.

Enabling source tracking for your private website

1. Enable Automatic redirect

In order to turn on source tracking for bookings made through your private website, you must enable Automatic redirect. OnceHub does not store source tracking information internally, and only facilitates the passing of your UTM tags to a third-party page.

You must set up your own landing page or custom confirmation page that is configured for use with web analytics.

2. Enable source tracking for the Event type

1. For Booking pages **associated** with Event types, go to **Booking pages** in the bar on the left → select the relevant **Event type** → **Booking form and redirect** section.
   For Booking pages **not associated** with Event types, go to **Booking pages** in the bar on the left → select the relevant **Booking page** → **Booking form and redirect** section.
2. In the **Booking form and redirect section**, turn Automatic redirect **ON** (Figure 1).

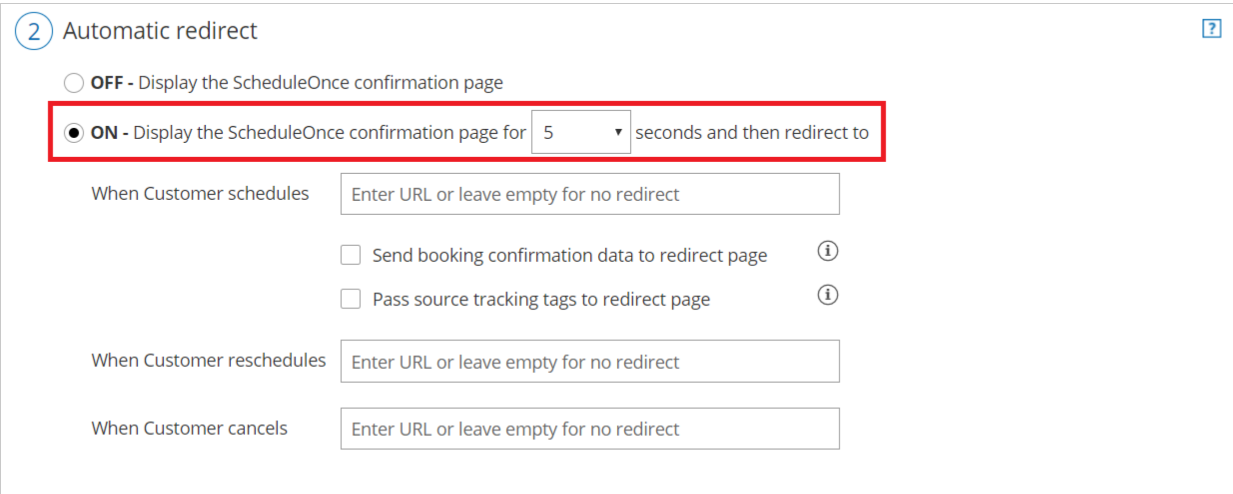


Figure 1: Booking form and redirect section

3. Enter the URL that you've configured for web analytics. You can add UTM tags to your Booking page links manually, or

use a URL-building tool.

4. Check the box to **Pass source tracking tags to redirect page**.
5. Click **Save**.
6. If you use Website integration, go to the **Schedule button** in the top navigation menu and select **Publish on your website**. Select your publishing option. In the **Customer data** step, select **Customer data is passed via URL parameters.**

Source tracking is now enabled and you can now analyze the source tracking data for your bookings.

> **Note:**
>
> Source tracking is only passed to the redirect URL when a booking is scheduled. Source tracking is not passed to the redirect URL when a booking is canceled or rescheduled.

Using booking pages with web analytics

Last Modified on Oct 12, 2022

Leads can be driven to your Booking pages from multiple online sources. For example, you might receive bookings from mass emails, social media, and pay per click (PPC) advertising. Tracking which campaign has generated the most bookings can help you focus on the campaigns that matter.

In this case, it is recommended that you use tracking technologies to identify the source of the booking. There are many third-party tracking technologies, such as Google Analytics. These technologies typically require you to place a snippet of HTML code on the page that you're tracking.

The simplest way to do this is to add source tracking tags to personalized Booking page links with different UTM tags for each of the campaigns that you want to track and redirect Customers to a custom landing page set up with your tracking code.

You can also embed your Booking page into a custom landing page on either end of the booking process. This gives you two reference points for tracking: the number of people that opened the Booking page and the number that completed the booking.

Tracking leads who opened the Booking page

1. **Booking pages** in the bar on the left → **Booking page → Share & Publish**.
2. Select the **Website embed** tab (Figure 1).

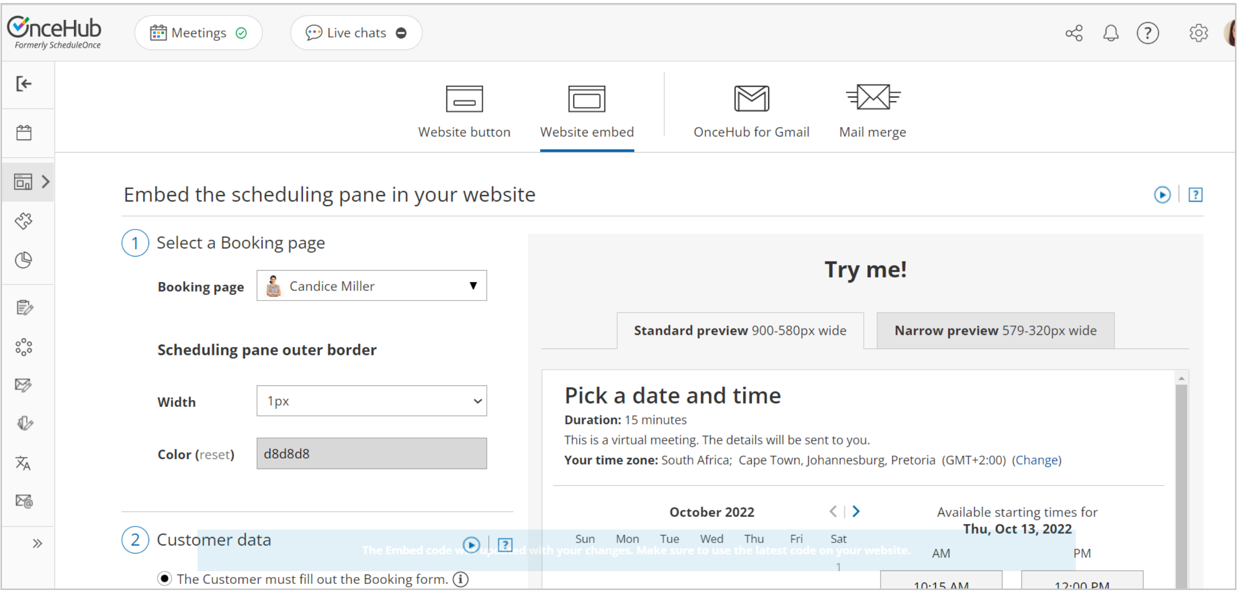


Figure 1: Website button tab

3. Select the Booking page or Master page you want to embed on your website.
4. Customize **Width** and border **Color**.
5. In the **Customer data** step, select to have Customers fill out the Booking form, or select a web form integration option.
   If you select a web form integration option, you can select to **Skip the Booking form** or **Prepopulate the Booking form**.
6. Click the **Copy** button to the copy the code to your clipboard.
7. Embed the Booking page on a custom landing page or website.
8. Add tracking code to the same custom page (for example, you can use Google Analytics).

9. Use the URL for your custom page as the call to action from your email, PPC, and social media campaigns.

Tracking completed bookings

1. Create a custom Thank you page.
2. Add the tracking code to the Thank you page.
3. Go to Booking pages and select the relevant Booking page.
4. In the Booking form and redirect section, turn Automatic redirect **ON.**

> **Note :**
>
> For Booking pages which are associated with Event types, the **Booking form and redirect section** is on the Event type. Learn more about the location of the Booking form and redirect section

5. Enter the URL you have configured for the Thank you page with tracking code. You can add UTM tags to your Booking page links manually, or use a URL-building tool.
6. Check the box to **Pass source tracking tags to redirect page**.
7. Click **Save**.

Your Booking page is now configured to track bookings. Every booking that is completed will automatically load your custom Thank you page and trigger the embedded tracking code.

Notifications troubleshooting: A User is not receiving SMS notifications

Last Modified on Oct 13, 2022

There can be a number of reasons why a User is not receiving SMS notifications. This article is relevant to Users who have never received User SMS notifications and to Users who were receiving them but suddenly are no longer receiving them.

Check that SMS notifications are enabled and that your mobile number is correct in your profile

1. Select your profile picture or initials in the top right-hand corner → Profile settings → **SMS notifications**.
2. Ensure that **Receive User notifications via SMS** is toggled **ON**.

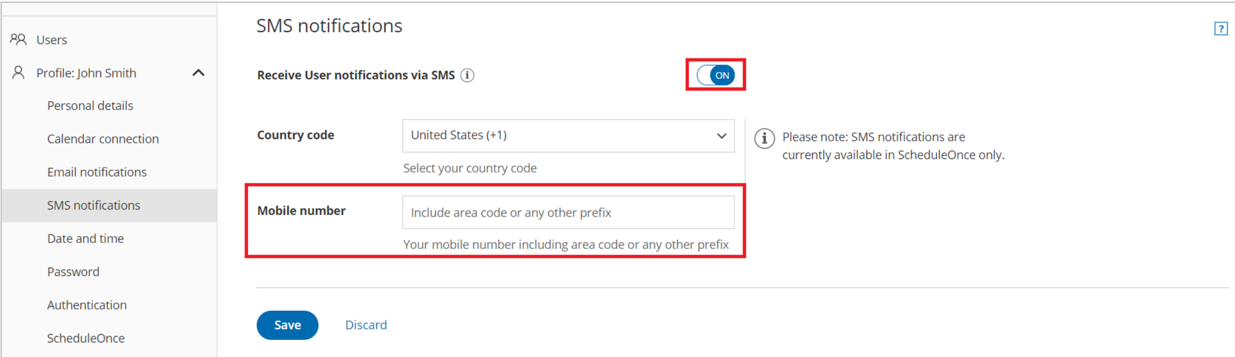


Figure 3: SMS notifications section

3. Ensure that the number entered in the **Mobile numbe**r field is correct. Additionally, ensure that the number entered is a mobile number and not a landline number.

Learn more about the SMS notifications section

Check the User notification settings

In order to receive notifications about bookings made on a specific Booking page, the User must either be the Owner or an Editor of the Booking page. Learn more about adding Editors to a Booking page

1. Hover over the lefthand menu and go to the Booking pages icon → Booking pages → your Booking page → **User notifications**.
2. Ensure that SMS notifications are enabled for the Notification scenarios each User should receive SMS notifications for.

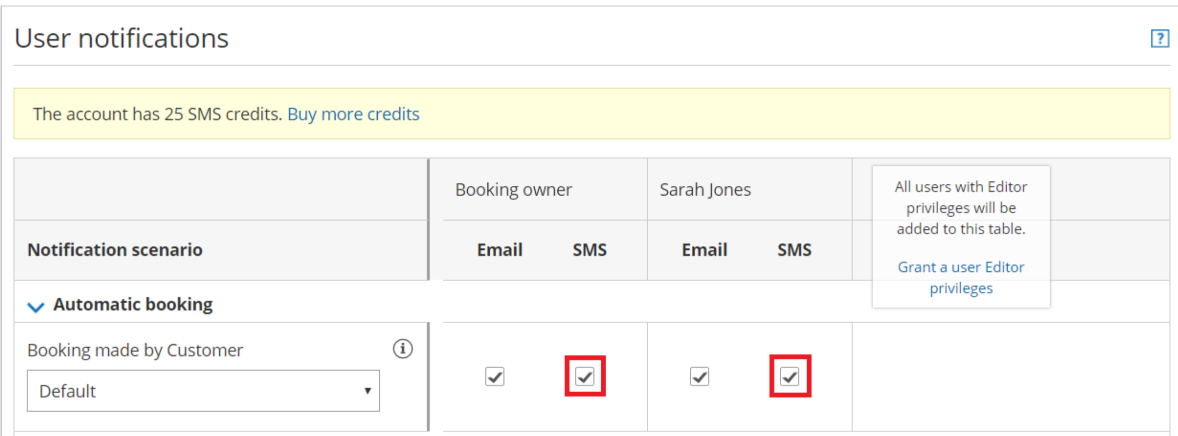


Figure 2: User notifications section

Learn more about the User notifications section

Make sure you have SMS credits available

1. Select your profile picture or initials in the top right-hand corner → **Profile settings** → **Billing** → **Licenses**. You can see the number of remaining SMS credits in the **SMS** box (Figure 1).

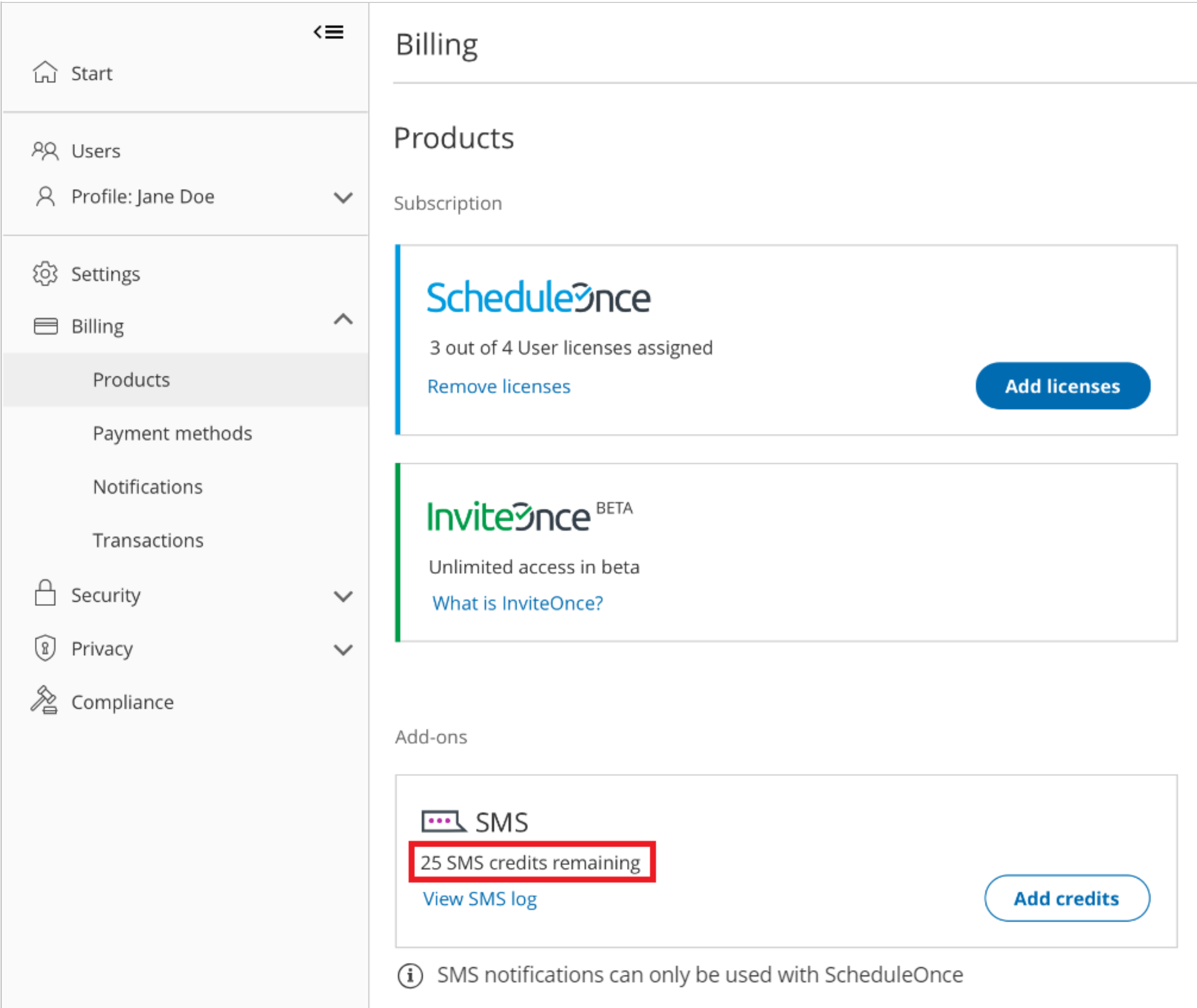


Figure 1: SMS credits

If your SMS credit balance is zero, click the **Add credits** button to purchase more SMS credits.

Learn more about SMS pricing and purchasing SMS credits

Check the SMS log

1. Go to your OnceHub Account.
2. Select your profile picture or initials in the top right-hand corner → **Profile settings** → **Billing** → **Licenses** → **SMS** → **View SMS log**.
3. Check the status of the SMS. Learn more about SMS delivery statuses
4. If the SMS shows a status of Delivered but the User did not receive it, check that the User's mobile number is correct.

Learn more about the SMS log

Send yourself a test SMS to see if it is received

1. Go to the relevant Booking page Overview section.
2. In the **Share & Publish** section, use the Public link to make a test booking.
3. Open the SMS log and check the status of the SMS.

If the SMS shows a status of Delivered but the User did not receive it, check that the User's mobile number is correct.

If the SMS is not Delivered, or an SMS is not sent, you can:

- Check that SMS notifications are enabled in your Profile.
- Check the User notification settings.
- Make sure that you have SMS credits available.

Notifications troubleshooting: A User is not receiving email notifications

Last Modified on Jun 2, 2023

There can be a number of reasons why a User is not receiving Email notifications. This article is relevant to Users who have never received User email notifications and to Users who were receiving them but are not anymore.

Note:

If you use Email from your own domain, please see the troubleshooting Email from your domain article.

Check your junk mail folder

We recommend that you check your junk mail to see if the notifications are there. Whether or not an email lands in junk mail depends on your own email client's filter. If you find it there, you can tell your email client that this notification is not spam.

Check your User notification Settings

In order to receive notifications about bookings made on a specific Booking page, the User must be either the Owner or an Editor of the Booking page. Learn more about adding Editors to a Booking page

1. Hover over the lefthand menu and go to the Booking pages icon → Booking pages → your Booking page → User notifications.
2. Ensure that email notifications are enabled for the Notification scenarios each User should receive email notifications for (Figure 1).

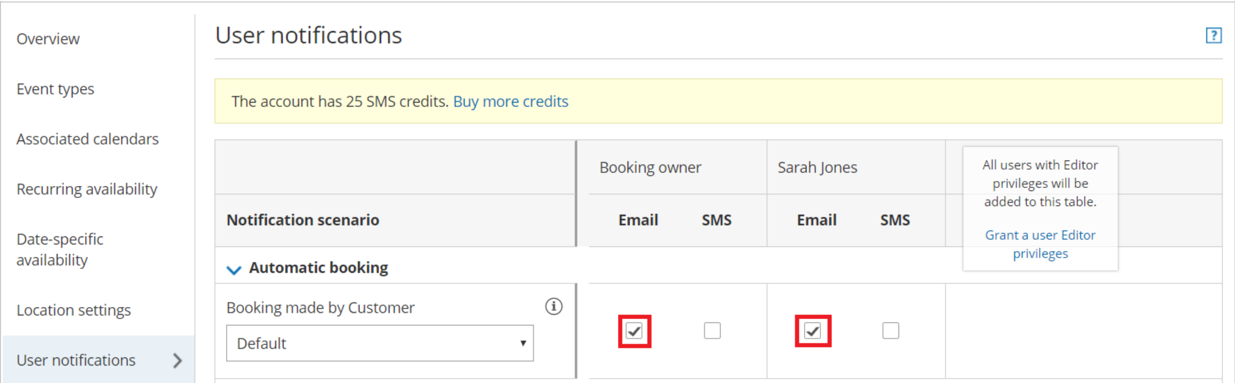


Figure 1: User notifications section

Learn more about the User notifications section

Verify that you are sending User email notifications to the correct email address

Ensure that the email address you are checking for notifications matches the email address used as your sign-in ID.

1. Select your profile picture or initials in the top right-hand corner → Profile settings → **Email notifications**.
2. If the email in the **Emails sent to** field is not the email address you want to use, click **Change your email ID** (Figure 2).

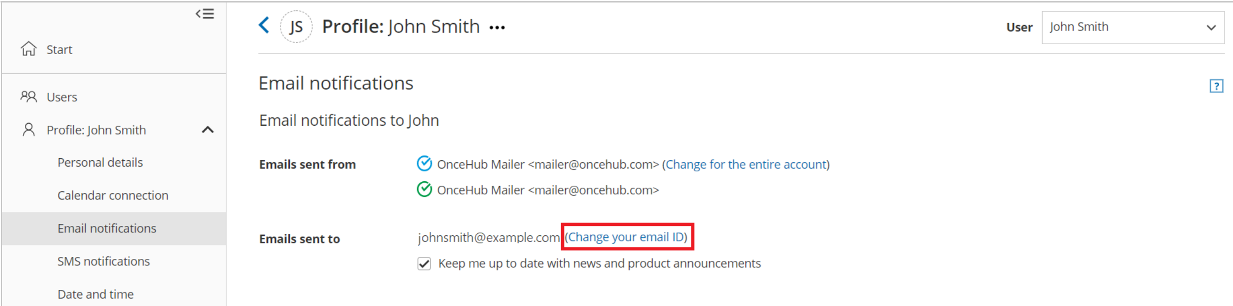


Figure 2: Email notifications section

Learn more about the Email notifications section

Test your email address

If the sign-in ID/Receiving email address matches the email address you've been checking, you can test the system using a different email address:

1. Change the email address in the **Emails sent to** field to a different email address temporarily. We recommend using an email address with a different domain than the one you were previously using.
2. Go to the relevant Booking page Overview section.
3. In the **Share & Publish** section, use the Public link to make a test booking.
4. Check the Inbox of the temporary email address and see if you received a confirmation email.

If you received a confirmation email to the temporary email address but not the original, it's possible that your email was placed on a suppression list by Amazon SES, our email service provider. This is usually because interaction with your email resulted in a hard bounce for an Amazon SES customer in the recent past. OnceHub can request for your email address to be removed from the Amazon SES suppression list. Please contact us to request this.

If you did not receive email to the new email address as well as the original email address, please contact us.

Domain troubleshooting: Email from your domain

Last Modified on Jun 2, 2023

This article is relevant to Users who have difficulty connecting to their domain mailbox and in cases where the feature has suddenly stopped working.

Setup troubleshooting

If one of your email details was entered incorrectly you will receive the following message: “Unable to connect to your mail server. Please check your details and try again.”

Be sure that the following fields are entered correctly, then try connecting again.

- Email address
- Password
- SMTP server
- Email port

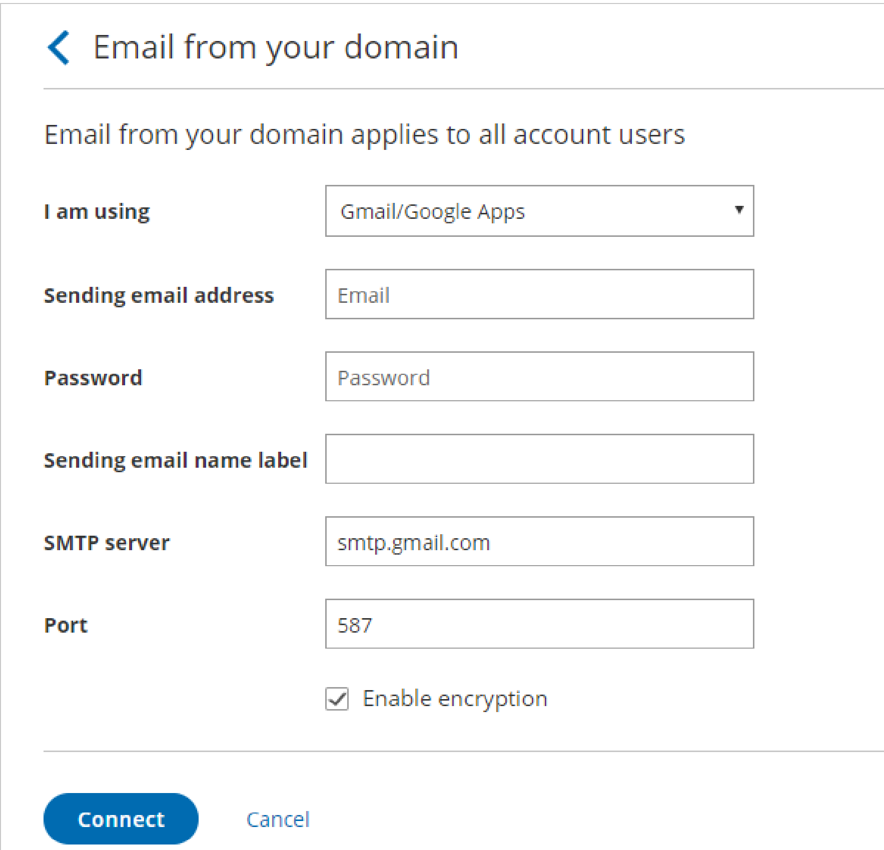


Figure 1: Connecting Email from your domain

Internally hosted email servers

If your mail server is hosted in-house behind a firewall, you will need to update your firewall settings to allow OnceHub to access your mail server. Please contact us for more information on how to update your firewall settings.

Incorrect password

When you use G Suite 2-step verification, you'll need to generate an app-specific password in the Google Account and use it as your password in the **Email from your domain** page.

Learn more about G Suite passwords

If you don't use G Suite 2-step verification, but you're still experiencing password issues, you'll need to enable basic authentication for your Google Account.

Learn more about enabling basic authentication for your Google account

Delivery troubleshooting

Emails have never been received

Hover over the lefthand menu and go to the Booking pages icon → Booking pages → your Booking page. Check the User notifications and Customer notifications sections to ensure that the email checkboxes are selected for the notifications you wish to receive (Figure 2). If you're using Event types, the Customer notifications will be in each Event type.

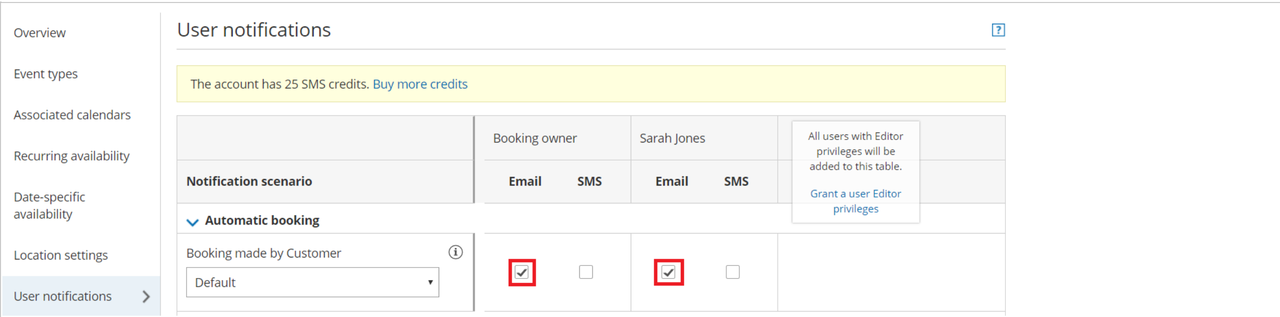


Figure 2: User notifications section

The emails could also be going to the SPAM folders of the receivers. You can verify this by sending yourself a test email and then checking your SPAM folder to see if the email is there. To send a test email, hover over the left sidebar and select **Tools → Email from your domain** (Figure 3).

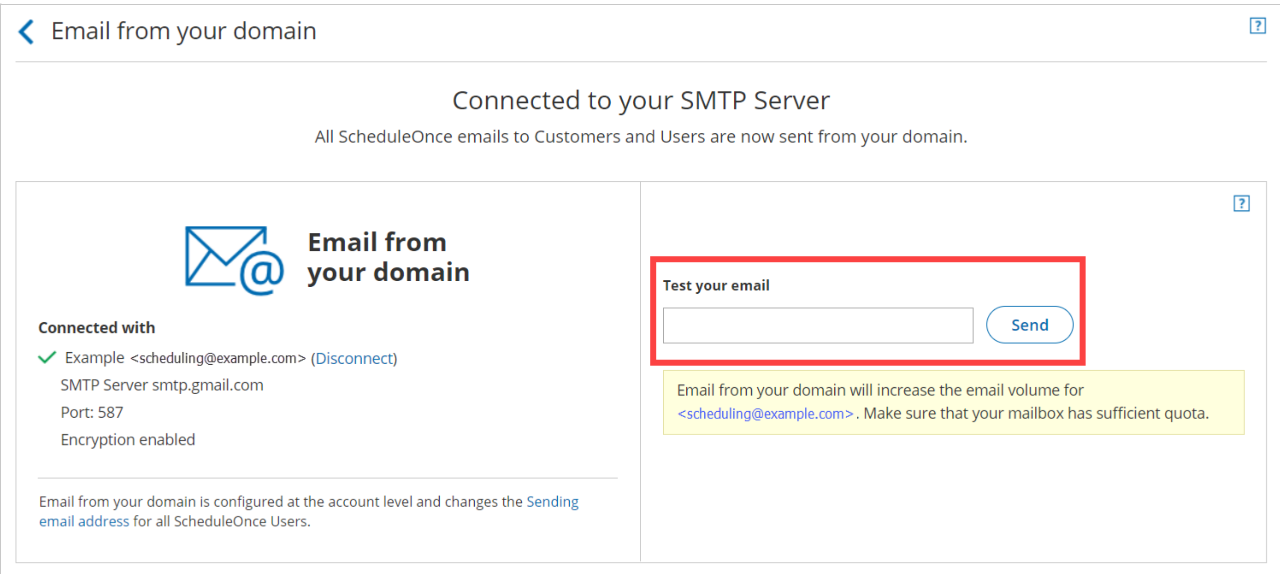


Figure 3: Email from your domain

Another issue could be that your email or domain has been blacklisted by the receiver's email service provider. Email service providers sometimes blacklist emails that they consider to be problematic. To avoid this, don't use your email account for activities that might be considered spamming.

Emails are no longer being received from your connected domain and are received from OnceHub Mailer

If you stopped receiving emails from your connected email domain and you're receiving emails from the OnceHub Mailer instead, some **Email from your domain** settings may have changed.

Note:

Connection errors may be encountered when emails are sent from your domain. In such cases, an automatic fallback sends emails from the OnceHub mailer until the connection is restored. This ensures that Users and Customers will continue to receive booking-related notifications.

- If you've changed your email password, you'll need to disconnect and reconnect Email from your domain. Learn how to set up Email from your domain
- If you've recently set up G Suite 2-step verification, you should generate an App password via Google and enter this in the password field under the Email from your domain setup. Learn more about G Suite passwords
- You might be over the daily sending quota for your connected mailbox that is allowed by your email service provider. Check with your email service provider.
- The emails could be going into SPAM. This can be verified by sending a test email and checking the SPAM folder to see if the email is there. To send a test email, go to the **Email from your domain** page.
- Your email or domain may have been blacklisted by the receiver's email service provider. Email service providers sometimes blacklist emails that they consider to be problematic. To avoid this, don't use your email account for activities that might be considered spamming.

Notifications troubleshooting: A Customer is not receiving SMS notifications

Last Modified on Oct 13, 2022

There can be a number of reasons why your Customer is not receiving SMS notifications. We recommend reviewing the following settings in your account to ensure Customers receive SMS notifications.

Check the SMS log

1. In the top navigation menu, select the gear icon → **Billing** → **Licenses** → **SMS** → **View SMS log**. Learn more about SMS delivery statuses
2. Check the status of the SMS.
   - If the SMS shows a status of **Delivered** but the User did not receive it, check that the User's mobile number is correct.
   - If the SMS was not delivered or not sent, review the settings below.

Learn more about the SMS log

Make sure your account has SMS credits available

1. Go to your OnceHub Account.
2. In the top navigation menu, select the gear icon → **Billing** → **Licenses**. You can see the number of remaining SMS credits in the **SMS** box (Figure 1).

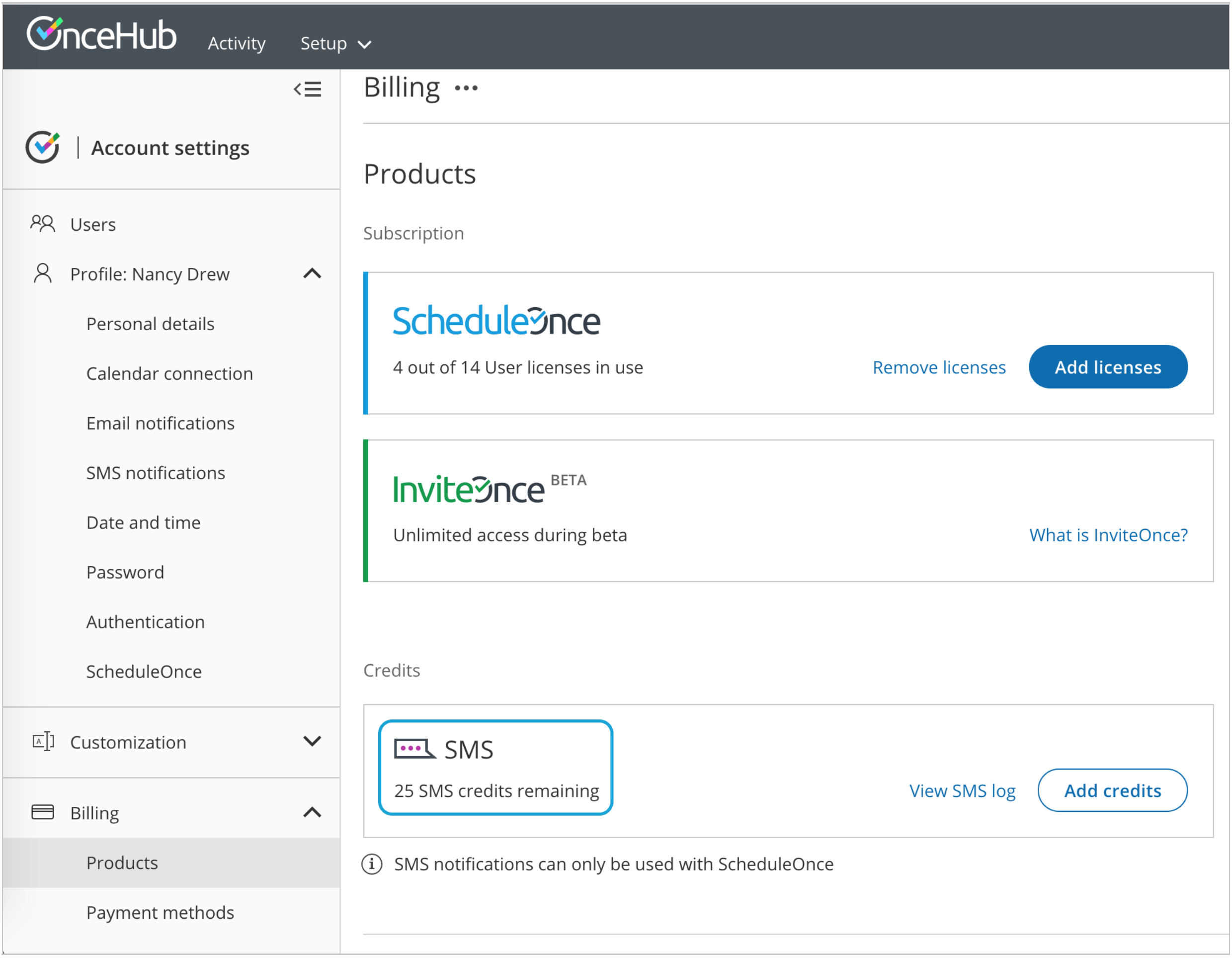


Figure 1: SMS Credits

If your SMS credit balance is zero, click the **Add credits** button to purchase more SMS credits.

Learn more about SMS pricing and purchasing SMS credits

Check the Customer notification settings

You need to enable SMS notifications for each Notification scenario that the Customer should receive SMS notifications for.

1. Hover over the lefthand menu and go to the Booking pages icon → Event types → your Event type → Customer notifications.
   If your Booking pages are associated with Event types, Customer notifications will be related to the Event type. Go to the relevant Event type → **Customer notifications**.
2. Enable SMS notifications for each Notification scenario you want to send SMS notifications to Customers for (Figure 2).

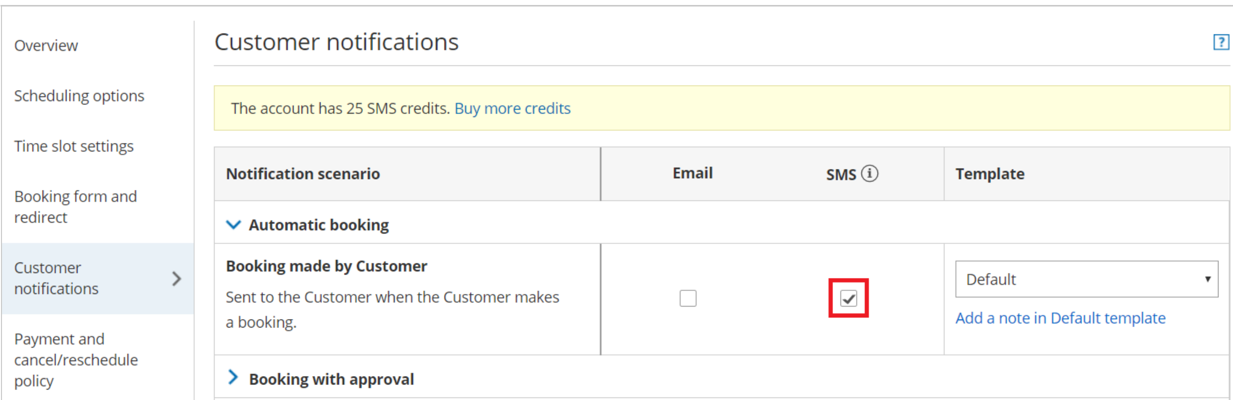


Figure 2: Customer notifications section

Learn more about the Customer notifications section

Make sure your Booking form includes the mobile phone field with SMS enabled

1. Hover over the lefthand menu and go to the Booking pages icon → hover over the left sidebar → **Tools** → Booking forms editor.
2. Ensure that the Booking form you are using includes the field **Your mobile phone** field. You will need to check this whether you're using default Booking form or a Custom Booking form that you have modified.
3. On the right side of the **Your mobile phone** field, ensure the **Enable SMS** checkbox is checked (Figure 3).

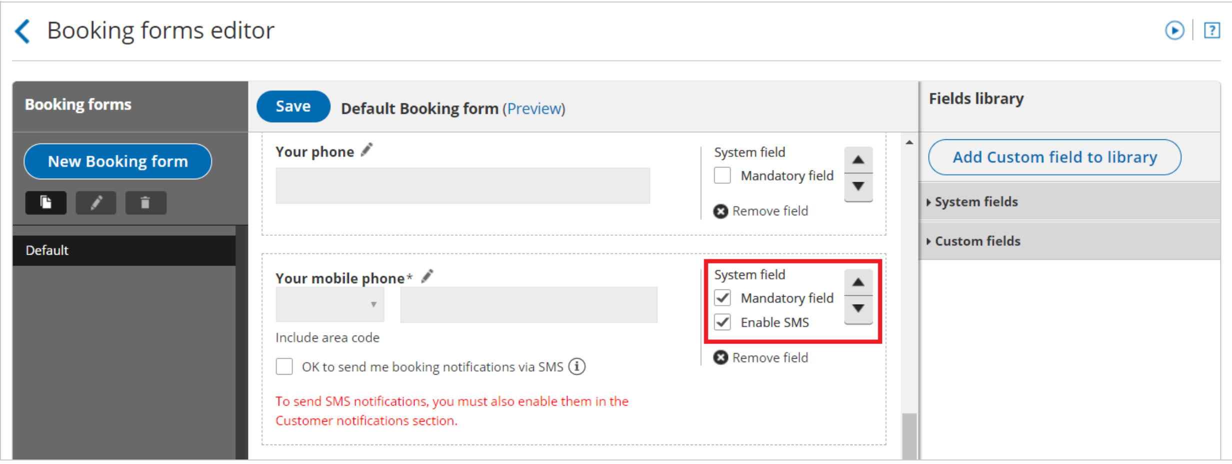


Figure 3: Booking forms editor

> **Note:**
>
> You can also make the **Your mobile phone** field mandatory.

Learn more about the Booking forms editor

Make sure that the Customer's mobile number is correct

1. Ask the Customer for the meeting's Tracking ID or Package ID. This can be found in the booking confirmation email that the Customer received.
2. Look up the meeting in the Activity stream using the Tracking ID.
3. The Customer's details as they were entered in the Booking form will be there. Learn more about filtering the Activity stream
4. Check that phone number is correct. You should also make sure that it is **not** a landline number.

The Customer's phone number can also be checked via the confirmation email you received when the Customer made the booking.

> **Note:**
>
> If you have gone through the above steps and have not resolved your issue, please contact us.

Domain troubleshooting: Unable to connect to the Google email server in Email from your domain

Last Modified on Jun 2, 2023

In this article, you'll learn how to handle a connection error when setting up Email from your domain with a Google email server.

OnceHub uses a basic SMTP connection to connect to your Google Account. The connection is completely secure and OnceHub does not have access to your Google credentials. However, Google considers basic SMTP authentication to be less secure than connecting through the Gmail API.

In order to connect the Google email server in Email from your domain, you must use 2-step verification with an App Password.

Although Google used to allow accounts to determine access to what they called less secure apps, which are third-party apps using a name and regular password to sign into Google, as of May 30, 2022, they no longer allow this for security reasons.

If you previously connected through this method and are seeing a connection error, please sign in again using 2-step verification and an App Password, as described below.

Generating an App Password for 2-step verification

If you use 2-step verification, you'll need to generate an App Password in your Google Account and use it as your password in the **Send Email from your domain** page.

Learn more about G Suite passwords

Booking page and Master page troubleshooting: "No times are currently available" message

Last Modified on Jun 2, 2023

There are a number of reasons why your Booking page or Master Page might display the message: "No times are currently available. Please contact the person you would like to schedule with."

In this article, you'll learn about some of the most common issues and how to resolve them.

Your Booking page or Master page is disabled

You may have disabled your Booking page or disabled your Master page. To enable your Booking page or Master page follow the steps below:

1. Hover over the lefthand menu and go to the Booking pages icon → Booking pages → your Booking page or Master page.
2. In the **Overview** section, ensure that the **Accept bookings** field is toggled **ON** (Figure 1).

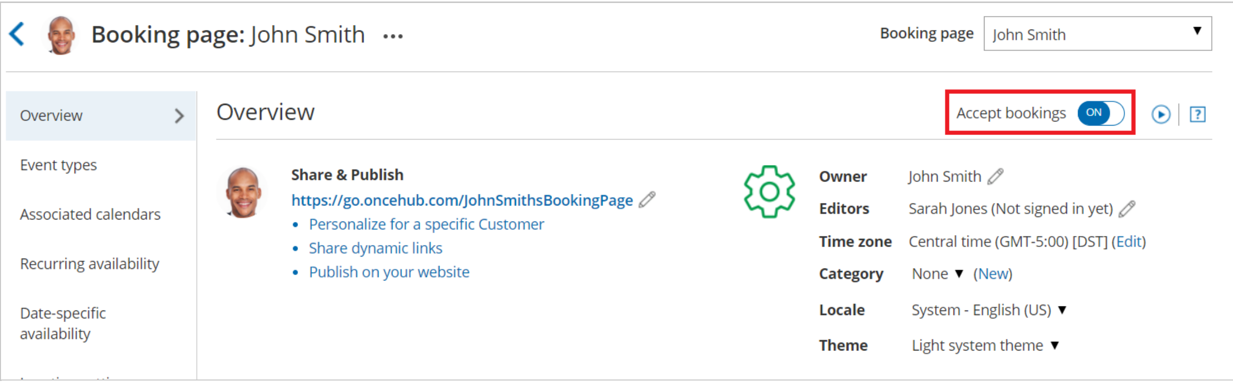


Figure 1: Booking page Overview section

OnceHub was unable to process your payment

If OnceHub was unable to process your payment, you will have a 7-day grace period to update your payment method. During this time, you can continue to use OnceHub as normal and Customers can still make bookings with you.

If you do not renew your payment after 7 days, your account will move to payment failure status. This means you will not have access to OnceHub and Customers will not be able to make bookings. However, your scheduling configuration is kept intact and you can still sign in to your OnceHub Account and access the billing section to update your payment method.

To resume payment, follow the steps below:

1. Sign in to your OnceHub Account.
2. In the banner below the top navigation bar, click the **Proceed to payment** link (Figure 2).

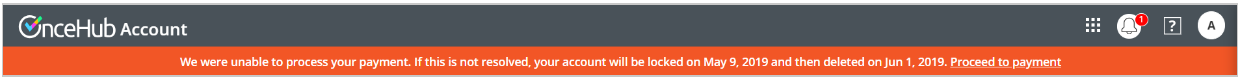


Figure 2: Payment failure notice

3. You will be prompted to establish a new recurring payment method for your account.
4. Enter your payment details and click **Submit payment**.

Learn more about recovering from a failed recurring payment

"No times are currently available" when connected to Outlook calendar

If you are connected to the PC connector for Outlook, you might have not yet performed the first sync. To enable the Booking page, you can either perform the first sync, or cancel the connection to Outlook.

- To complete the setup and perform the sync, install the connector and the click the **Settings** button to connect and configure the connector.
- To cancel the connection, select your profile picture or initials in the top right-hand corner → **Profile settings** → **Calendar connection**. Then, click **Cancel my connection to Outlook**.

"No times are currently available" when connected to Google calendar

If you are connected to Google Calendar, the "No times are currently available" might be caused by the following:

- You have revoked the Google permissions for OnceHub. To renew your OnceHub connection to your Google Calendar, select your profile picture or initials in the top right-hand corner → **Profile settings** → **Calendar connection**. Then click the **Reconnect your Google Calendar** button.
- If you have been receiving a large quantity of bookings in a short window of time, you might have reached the Google Calendar quota, administered by Google.

Settings configuration issues

The "No times are currently available" might be caused by one of the following configuration error in your settings.

Availability is not defined or is shorter than time slot duration

To fix this, define your availability, increase your availability, or reduce the time slot duration.

- To define availability, select your profile picture or initials in the top right-hand corner → **Profile settings** → **Availability** → **Scheduled meetings**. Then, add or remove availability.
- If you define your availability on individual Booking pages instead of in your User profile settings, hover over the lefthand menu and go to the Booking pages icon → Booking pages → your Booking page → **Recurring availability** or **Date-specific availability**.

Busy time from your calendar is completely blocking out your availability

To check if busy time from your calendar is completely blocking out your availability, compare your connected calendar's events to your defined availability in OnceHub. You may need to create more availability, remove an event on your calendar, or change the status of your events in your calendar from Busy to Free status.

Starting times at a time in which you have no availability

The **Starting times** setting in the Time slot display is set to start at a start time for which you have no availability. For example, your availability is for 30 minutes and starts on the hour and the "Starting times" setting starts at 45 minutes only.

Learn more about setting Starting times in the Time slot display settings

Timeframe rules are hiding your availability

The **Before the event** and **Into the future** settings under the Timeframe rules in the Time slot settings are hiding your availability.

Learn more about Timeframe rules

The buffer between OnceHub bookings and busy time is too big

The **Buffer before and after the meeting** setting in the Workload rules section of the Time slot settings is too big.

Learn more about Workload rules

No Booking pages have been included in your Master page

You have not included any Booking pages in the Master page. To include a Booking page in your Master page, select the relevant Master page → **Assignment.** Then, add Booking pages.

Learn more about including Booking pages in Master pages

> **Important:**
>
> If any of the Booking pages that have been added to your Master page are affected by one of the configuration issues described above, the "No times are currently available" message will be displayed.

Booking page troubleshooting: Why does my Booking page say I’m available when I’m busy?

Last Modified on Oct 13, 2022

If busy time is not blocking your availability, or if you received a double booking, you can check the following settings.

When using OnceHub with a connected calendar

- Make sure that you're retrieving busy time from your connected calendar. To see which check which calendar busy time is being retrieved from, hover over the lefthand menu and go to the Booking pages icon → Booking pages → your Booking page → **Associated calendars.** Learn more about the Associated Calendars section
- Make sure that you haven't enabled Group sessions with multiple or unlimited bookings per slot. You can set the option to One-on-one session or Group sessions with the number of bookings per slot that you want to accept. To configure One-on-one or Group sessions, hover over the lefthand menu and go to the Booking pages icon → Event types or Booking pages → your Event type or Booking page → **Scheduling options → One-on-one or Group sessions.** If you are using Event types, the Scheduling options section is on the Event type.
- If you are working in Booking with approval mode, make sure you did not approve two bookings in the same time slot.
- Ensure that the event in your connected calendar that is not blocking availability is set to "Busy" and not to "Available" or "Free". Only events with a status of "Busy" block your availability**.** Learn more about when Calendar events are treated as busy time

When using OnceHub without a connected calendar

- Make sure that you haven't enabled Group sessions with multiple or unlimited bookings per slot. You can set the option to One-on-one session or to Group sessions with the number of bookings per slot that you want to accept. To configure One-on-one or Group sessions, hover over the lefthand menu and go to the Booking pages icon → Event types or Booking pages → your Event type or Booking page → **Scheduling options → One-on-one or Group sessions.** If you are using Event types, the Scheduling options section is on the Event type.
- If you are working in Booking with approval mode, make sure you did not approve two bookings in the same time slot.

Paypal troubleshooting: Payment integration issues

Last Modified on Jun 2, 2023

There are a number of reason why you might not be able to accept payments or process refunds via OnceHub. This article describes potential issues with payment integration and how these issues can be fixed.

You cannot accept payments

If you cannot accept payments via OnceHub, you should check errors related to the connected PayPal account. Errors might occur for the following reasons.

Your account is disconnected from PayPal

If your account is disconnected from PayPal, your Billing Agreement might have been revoked or the permissions granted to OnceHub were canceled in your PayPal account.

To fix this, check the connected PayPal account and reconnect in OnceHub.

Learn more about connecting to your PayPal account

Your PayPal account is frozen

Your PayPal account might be limited or frozen for security reasons in PayPal. You can log in to your PayPal account to understand why your account is limited. Account limitations prevent OnceHub from completing certain actions such as sending or receiving money.

You removed the currency set in the Event type from your PayPal account

If you have removed the currency set in the Event type from your PayPal account, it will affect the collection of reschedule fees when a reschedule is attempted by the Customer. Since the Reschedule fee currency does not exist in PayPal, the reschedule will not be possible.

Issues are encountered with the PayPal connection

OnceHub might not be able to confirm the transaction due to errors with the PayPal connection. In this case, the Customer will not be able to make a booking.

Check the OnceHub Status page for known issues

Refunds cannot be processed

If refunds cannot be processed, you should check errors related to your Refund settings, the Booking page Owner/Editor, or the specific transaction. This might happen for the following reasons:

Your OnceHub account cannot process refunds via OnceHub

If your OnceHub account cannot process refunds via OnceHub, you should change the Refund settings to allow processing of refunds via OnceHub.

Learn more about customizing Refund settings

The Booking page Owner or Editor does not have permission to refund via OnceHub

Check each User's profile to ensure that the Booking page Owner or Editor has permission to refund via OnceHub.

Learn more about the OnceHub permissions section

Transactions older than 60 days cannot be refunded

Refunds are limited to 60 days by default in your PayPal account and refunds cannot be made after the limit. If you still want to refund old transactions, you should contact PayPal to extend the transaction refund limit.

There are not enough funds in the PayPal account

If there are not enough funds in your PayPal account, you won't be able to process refunds for that specific transaction. Check your PayPal account.

Note:

If you have explored all these options and you are still experiencing issues, please contact us.

Salesforce troubleshooting: Connector issues

Last Modified on Jun 2, 2023

This article describes potential issues with the Salesforce integration and how these issues can be fixed. If you're still having problems, please contact us and we will be happy to assist you.

If Users connected to Salesforce cannot accept bookings, there could be a number of different causes for this. To identify the root cause, you need to determine whether the issue affects all Users connected to Salesforce, or if it affects individual Users only.

Issues affecting all Users connected to Salesforce

In this case, you should first check errors related to the Salesforce API User. Then, you should check the status of the Salesforce API call usage in your Salesforce account.

Checking the Salesforce API User

The Salesforce API User connection in your OnceHub account

If we have detected a problem with the API User connection, the API User will be disconnected from your OnceHub account. In this case, you must reconnect the Salesforce API User.

This typically happens for the following reasons:

- The API User credentials are no longer valid. The Salesforce password may have been reset and the security token may have changed. OnceHub uses these credentials to validate the API User connection, so they must be up to date.
- The OnceHub connector for Salesforce managed package was uninstalled and then reinstalled in your Salesforce organization. When this occurs, the Salesforce API token expires.

To resolve this issue, follow the steps below:

1. Hover over the lefthand menu and go to the Booking pages icon → open the lefthand sidebar, then select **Integrations -> CRM**. In the **Salesforce** box, click **Setup** (Figure 1).

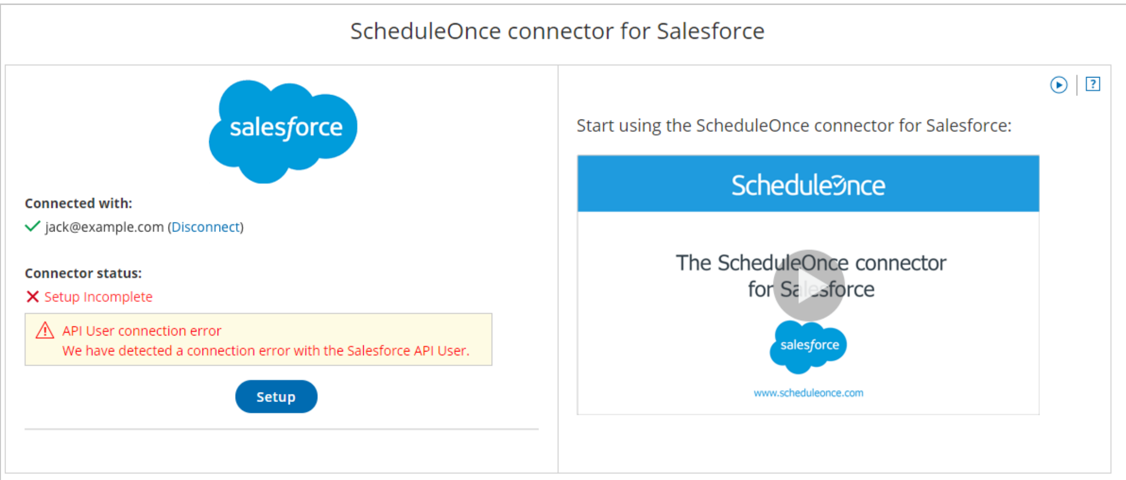


Figure 1: Salesforce API User Disconnected

2. Click the **Reconnect the API User** button (Figure 2).

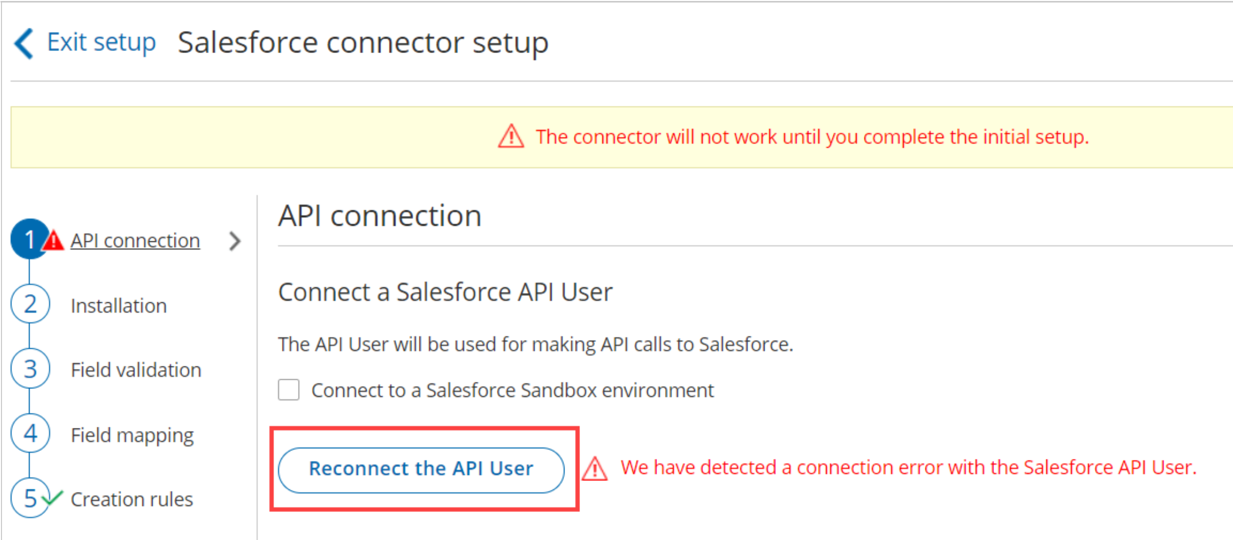


Figure 2: Reconnect the API User

Check the Salesforce API User settings in your Salesforce account

The Salesforce API User is used as a funnel for transferring data between OnceHub and Salesforce. If the API user is properly connected and a global connection problem still exists, it may be the case that changes have been made to the Salesforce API User license, a System Administrator profile, and the OnceHub permission set.

Check the API Usage limit in the past 24 hours

Each Salesforce organization has a limited number of API calls. Each Salesforce organization can be integrated with several applications at a time—OnceHub may just be one of many applications talking with your Salesforce account. This limited number of API calls per Salesforce organization is made available every 24 hours. The number of API calls depends on your contract with Salesforce.

If you have exceeded the API call limit for your Salesforce account, the OnceHub connector for Salesforce will not be able to make API calls to your Salesforce account and connected Users will not be able to accept bookings.

In your Salesforce account, you should check the API Usage limit across your third-party applications and adjust your settings. Go to the **Setup** page, then select **Platform tools -> Environments -> System Overview**. Learn more about System Overview: API Usage

Issues affecting only single Users connected to Salesforce

There are many ways in which OnceHub bookings can update Salesforce. For example, some bookings may be made with existing Salesforce contacts and not create new records, while others can be made with Leads and create new Lead records in Salesforce. Since most Salesforce organizations have a wide range of required fields and validation rules, these rules may block specific booking scenarios and not allow creation of new records in Salesforce.

When validation errors are encountered, you need to pinpoint the validation problem by identifying the Booking pages and Salesforce standard objects that are affected. In this case, you should first check the Field validation step of the Salesforce connector setup process. Then you should check if you have custom fields that are universally required in Salesforce and not supported by the integration.

Check the Field validation step of the Salesforce connector setup process

You might have recently added universally required custom fields to the affected Salesforce object. When these fields are supported field types in the Salesforce integration and do not have a Salesforce default value, they will appear in the Field validation step of the Salesforce connector setup process.

When a booking is made and a required field in Salesforce has not been mapped to a field in OnceHub, a Field validation error will be detected. OnceHub will pass a default value to the field in Salesforce. Learn more about default values for universally required fields

Check for non-supported universally required custom fields

You might have recently added universally required custom fields to the affected Salesforce object. When these fields are non-supported field types in the Salesforce integration and do not have a Salesforce default value, they will be indicated in the Field validation step of the Salesforce connector setup process and will not be able to accept a value from OnceHub.

The only solution to this is to set these fields as non-mandatory for the affected Salesforce object, or to set a default value in Salesforce. If you cannot associate a default value for these fields in Salesforce and still want these fields to be required fields for manual entry, you can make these fields required on the Page Layout of the object. Learn more about Page Layouts

Other issues

If you’re still seeing issues, please contact us and we'll be happy to assist you.

Zapier troubleshooting: Integration issues

Last Modified on Jun 2, 2023

This article describes potential issues while integrating OnceHub with Zapier and how these issues can be fixed. Learn more about our Zapier support policy

The Zap is active but data is not transferred to the third-party app

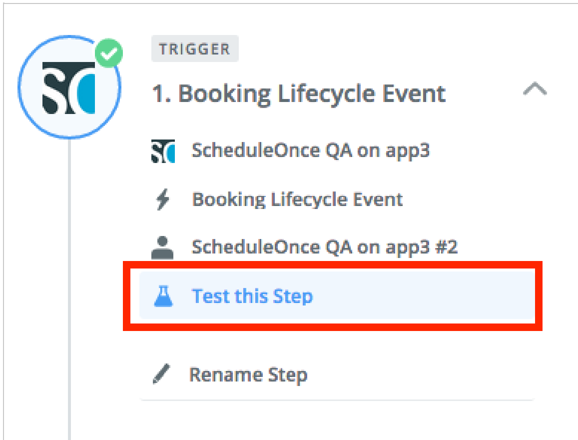
1. Select your profile picture or initials in the top right-hand corner → **Profile settings** → **Zapier**.
2. In the **Manage Zaps** tab, find the specific Zap and click the pencil icon to open the Zap Editor.
3. 

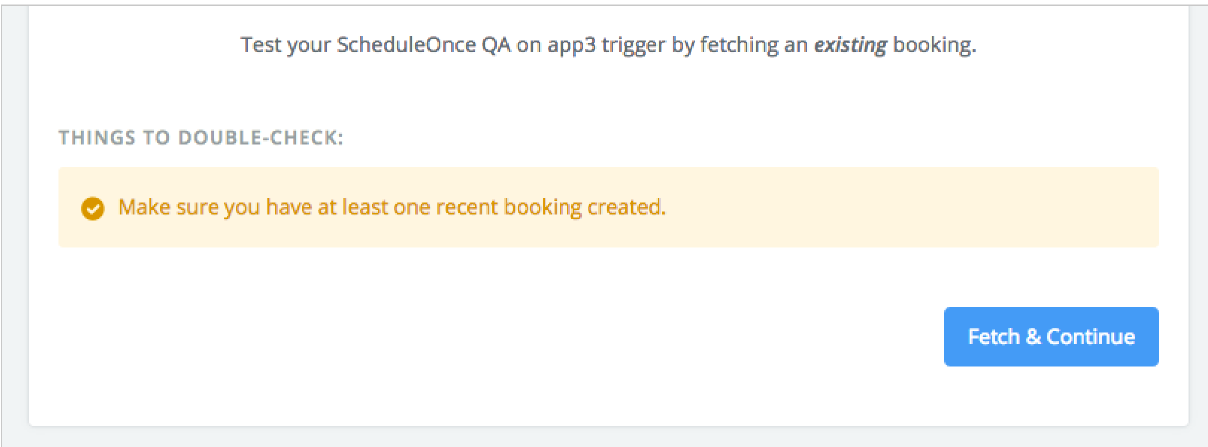
Figure 1: Test the OnceHub trigger
Click **Test this Step** to test the OnceHub trigger (Figure 1).
4. Zapier may ask you to create a new booking in OnceHub. If you have defined a Filter step in your Zap, make sure that the new booking can pass through the filter.


Figure 2: Fetch data
5. If Zapier doesn't receive any data from OnceHub, test the OnceHub/Zapier connection in Zapier.
6. If the connection fails, try to reconnect. Make sure you enter the correct API key and OnceHub login email.
7. If this does not resolve the issue, regenerate your API key in OnceHub. Open the left side bar and navigate to **Zapier → API key** tab, regenerate the key, and reconnect. Make sure you enter the new API Key in Zapier.

Too many Zaps are triggered from the same Booking page.

By default, Zaps are triggered only from Booking pages owned by the connected User. A OnceHub Administrator can be granted permission to trigger Zaps from pages not under their ownership.

If an Administrator and another connected User have duplicate Zaps, and the Administrator is granted the permission to trigger Zaps from pages not under their ownership, both the Administrator's Zap and the User's Zap will be triggered from the same Booking page.

To fix this issue, you can:

- Restrict Zaps to specific Booking pages, by adding a Filter step in the Zap. Learn more about adding a Filter step in Zapier
- Remove any duplicate Zaps.

Zapier creates too many records in the integrated app.

If Zapier is creating too many records in the integrated app (for example, if Zapier adds a new contact when a booking is canceled in OnceHub), you'll need to filter the data that Zapier sends to the integrated app.

For example, if the filter is **Booking – Status / Exactly matches / Scheduled**, the integration will only be triggered with new bookings. If the filter is **Booking – Status / Contains / Scheduled**, the integration will be triggered with both new and rescheduled bookings, but not with canceled bookings. Learn more about adding a Filter in Zapier

Activity dates or hours in the connected app do not match the dates or hours of the related OnceHub booking.

If the meeting time in the integrated app is incorrect, it may be the case that your integrated app supports time zones and does its own conversion from UTC. In this case, you will need to map the **Meeting time in UTC** field to the Task starting time. Your integrated app will handle the conversion to the appropriate time zone.

The new lead's mobile phone appears with a different international prefix.

When mapping this field to a lead or contact phone number, OnceHub does not send the + prefix (indicating an international number). If you want this prefix to be created, you can add it as static text before the field.

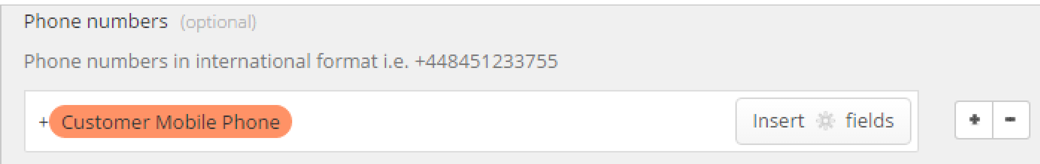


*Figure 3: Mapping **Customer - Mobile phone** field in Zapier*

Zap is not found when trying to edit it from within OnceHub.

To edit a Zap from within OnceHub, you must be logged into your Zapier account. If you receive a **Zap not found** error message when trying to edit a Zap (Figure 4), it means that the Zap belongs to a different Zapier account than the one you are logged in to.

To resolve the error, follow these steps:

1. Close the Zap Editor popup.
2. Sign in to the correct Zapier account in a different browser tab.
3. Go back to the **Manage Zaps** tab in OnceHub and edit the Zap.

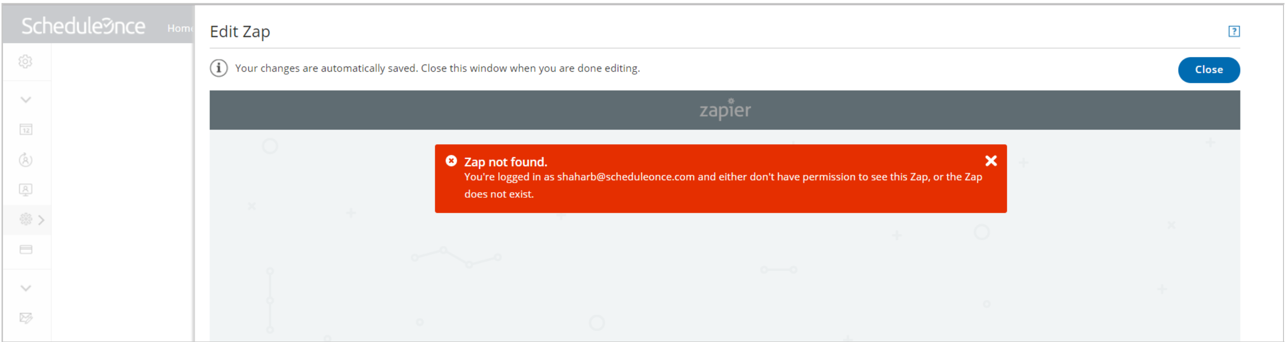


Figure 4: Zap not found

Outlook troubleshooting: The connector is not syncing as expected

Last Modified on Jun 2, 2023

There can be a number of reasons why your bookings are not showing up in Outlook, you are seeing double bookings in Outlook, or your availability is not reflected correctly in OnceHub.

This article describes how these issues can be fixed. If you're still having problems, please contact us and we will be happy to assist you.

Is the connector running?

Check to ensure that the OnceHub connector for Outlook is running in the taskbar (Figure 1).

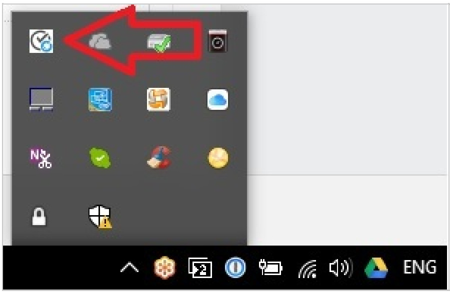


Figure 1: OnceHub Connector for Outlook

The connector must be running and connected to the internet in order to sync between Outlook and OnceHub. If it is not running, new bookings from OnceHub will not be synced to Outlook and new events in your Outlook Calendar will not block availability in OnceHub, which can cause double bookings.

Learn more about connecting and configuring the connector for Outlook

Is the connector displaying an alert?

The connector is programmed to alert you when specific issues arise, so you will be aware of any issues that arise.

Learn more about alerts notifying you of issues that affect syncing

When did the Connector last sync?

Open the OnceHub connector for Outlook to see when the **Last sync** took place (Figure 2). This will be shown above the Settings button.

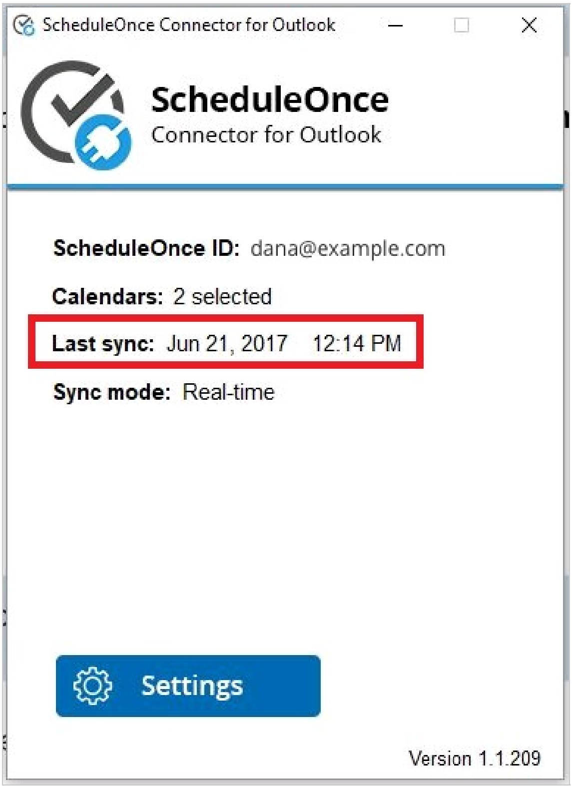


Figure 2: Last sync

The latest time the connector synced is affected by the sync mode you are using. If you are using real-time mode, the latest sync should be the last time you received a OnceHub booking or changed something in a syncing Outlook Calendar. If you are using auto-sync every X minutes/hours, the latest time will correspond to the duration of auto-sync you have configured.

Learn more about sync modes

If it has not synced recently, you can prompt a sync by clicking **Settings** and going through all the steps.

Learn more about connecting and configuring the OnceHub connector for Outlook

Is the calendar event set to show as Free?

In order to block events in OnceHub, the calendar event in Outlook must be set to show as Busy or another setting besides Free. Events showing as Free will not be blocked in OnceHub.

Learn more about when calendar events are treated as busy

Is your OnceHub account configured to block availability for busy events?

The default Booking page configuration is a one-on-one session, with busy time blocking availability as soon as you have one event in any calendar for which OnceHub is reading busy time. However, if busy time is not being blocked when it should be, it's possible you have changed this configuration. For example, you may have enabled group sessions.

Learn more about what to do when busy time is not blocking availability

Is the correct calendar selected in OnceHub?

To check that OnceHub is retrieving busy time from the correct calendars, select the relevant Booking page **-> Associated calendars** (Figure 3). Ensure that your connected Outlook Calendar is selected as the **Main booking calendar** or **Additional booking calendar**. You should also ensure that busy time is being retrieved from your connected Outlook Calendar.

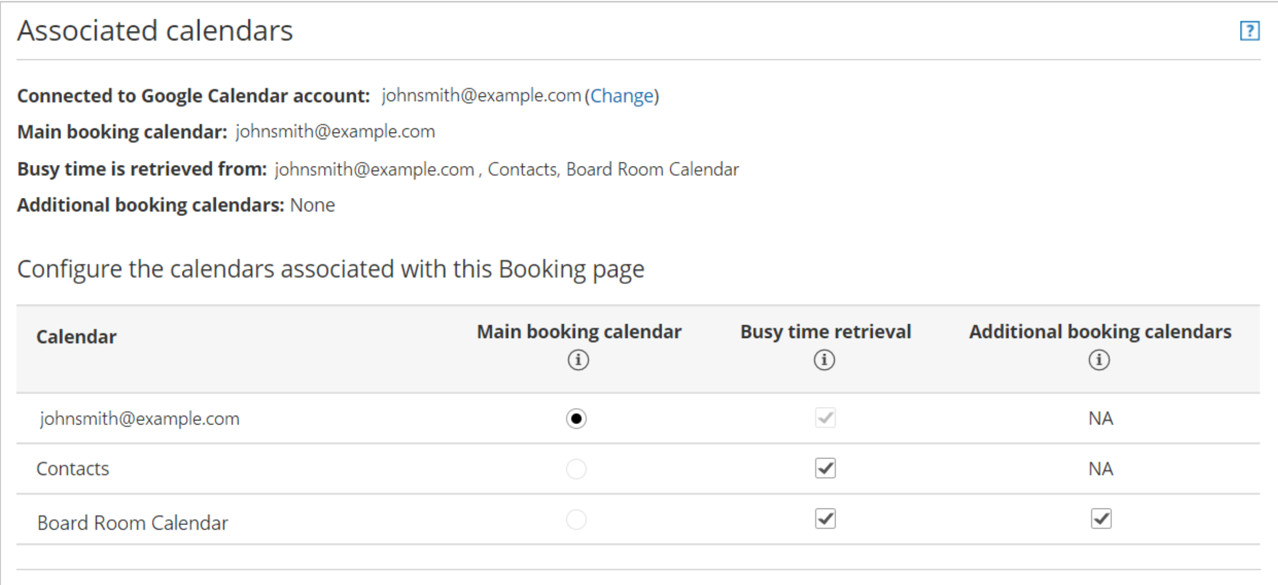


Figure 3: Associated calendars section

Learn more about customizing calendar settings

Do you still have permissions for the calendar you are syncing?

If you are trying to sync Microsoft Exchange shared calendars, check the permissions of the calendar(s) you are syncing with OnceHub. In Outlook, right-click on the relevant calendar (Figure 4).

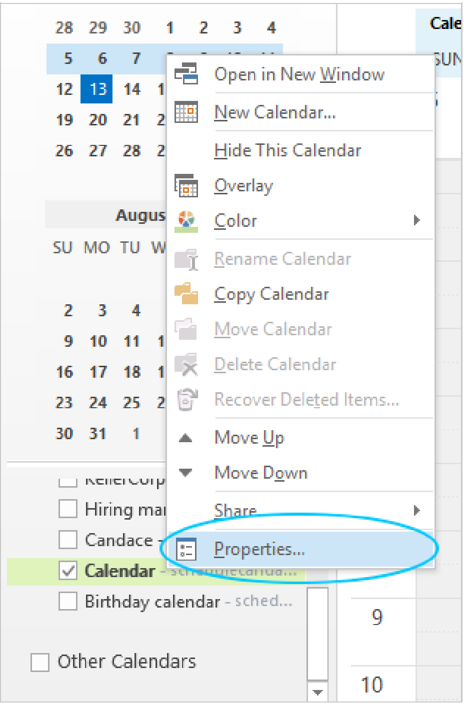


Figure 4: Calendar properties

Go to **Properties -> Permissions -> Permission level** (Figure 5). Ensure that you still have read/write capabilities for the calendar.

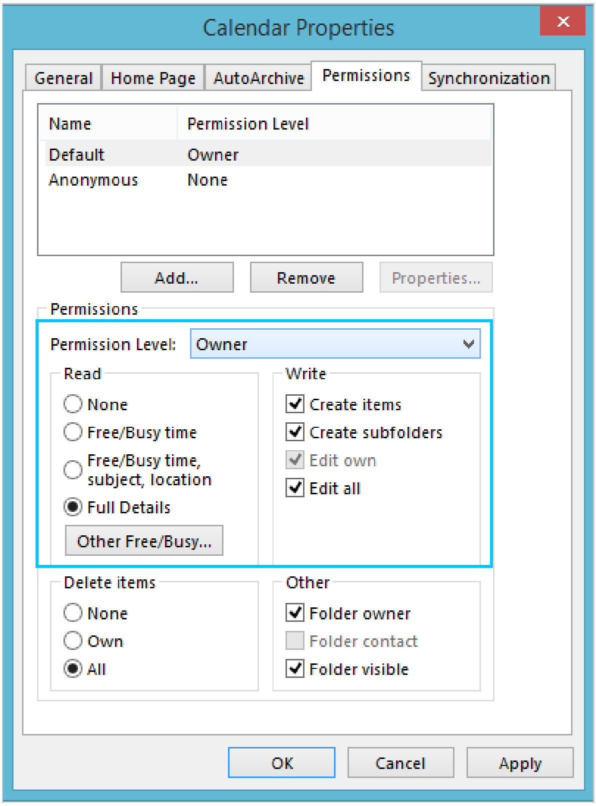


Figure 5: Permissions

Are you using an alternate method to send meeting invites through the connector?

If OnceHub has prompted you to use an alternate method for sending meeting invites, this might cause an Outlook security alert to pop up, which will cause Outlook to ignore the connector. This happens because you are using the connector to send an email (the calendar invite), so it raises a red flag for Outlook's basic security system. You can change this by disabling the security alert.

Are you running antivirus software or a firewall?

Your antivirus software or firewall might be blocking the sync. To fix this, you or your IT team can create a whitelisted exception for the program Scheduleoncec4o.exe. In the case of a firewall, you can open specific ports required for syncing in real time. Ask your IT department to open XMPP ports 5222 and 5223.

Alternatively, you can switch sync mode from real-time sync to auto-sync every 5 minutes (or another amount), and the XMPP ports will not be required.

Outlook troubleshooting: The Outlook connector is not syncing and displays an alert

Last Modified on Jun 2, 2023

If you are experiencing connection issues between your Connector and OnceHub, you might receive an alert on your PC informing you what the issue is.

Note:

If you are not receiving an alert message, but the connector is still not syncing, there are other reasons your sync might be affected. Learn more about how to fix an Outlook connector that is not syncing as expected

If the alert is from Outlook rather than the connector, you might have encountered the Outlook security alert, which should be disabled.

The connector will not be able to connect to OnceHub in the following cases.

You have changed your sign-in ID

If you have changed your sign-in ID, the connector will display a pop-up (Figure 1).

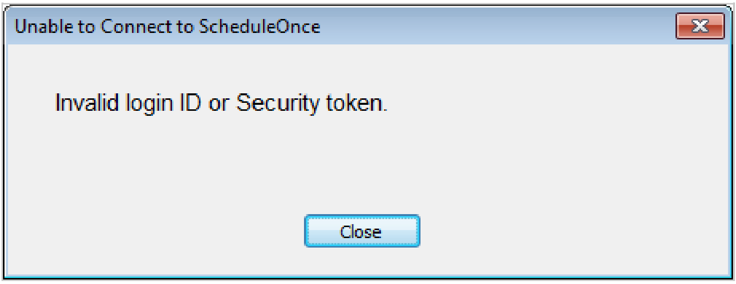


Figure 1: Unable to Connect to OnceHub pop-up

To resolve this, click the **Settings** button on the connector and update the OnceHub Once sign-in ID to the new ID.

The connection to Outlook Calendar has been disabled in OnceHub

If the connection to Outlook Calendar has been disabled in OnceHub, the connector will display a pop-up (Figure 2).

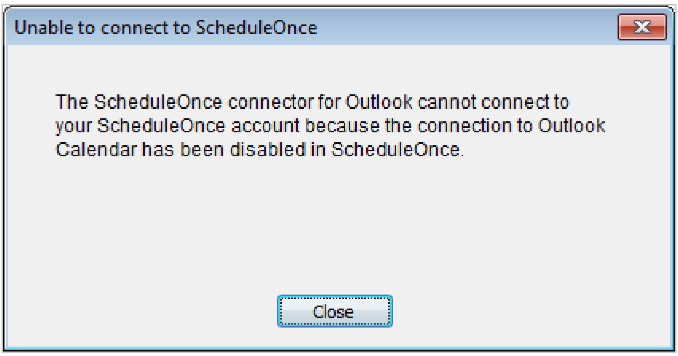


Figure 2: Unable to Connect to OnceHub pop-up

To resolve this:

1. Log into OnceHub and select your profile picture or initials in the top right-hand corner → **Profile settings** → **Calendar connection**.
2. In the Outlook calendar integration page, click the **Connect** button.
3. Copy the new security token.
4. In the connector, click the **Settings** button and paste the new security token.

OnceHub is unable to process your payment

If OnceHub is unable to process your payment, the connector will display the following pop up (Figure 3):

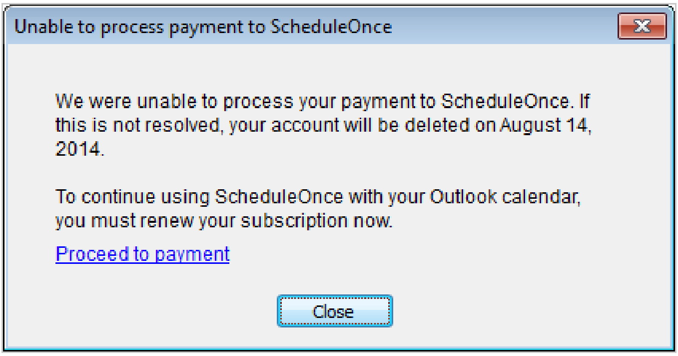


Figure 3: Unable to Connect to OnceHub pop-up

When your organization is using OnceHub, your OnceHub account is charged a recurring fee, based on your subscription payment cycle. If a recurring payment cannot be processed, your account will be suspended and placed on hold. You must renew your subscription if you want to continue using OnceHub with your Outlook calendar.

Learn how to renew your OnceHub subscription

Outlook troubleshooting: Generating an Outlook connector log file

Last Modified on Jun 2, 2023

If you encounter issues with the Outlook connector, OnceHub may ask you to generate a log file that will help us troubleshoot the problem. The log will register the detailed steps about the problems you encountered and will help our Support team resolve the issue.

Note:

If you would like us to assist you in generating and sending logs, please contact us.

In this article, you'll learn how to generate an Outlook connector log file.

Generating an Outlook connector log file

1. In the taskbar on your desktop, click the PC connector icon and select **Open connector** (Figure 1).

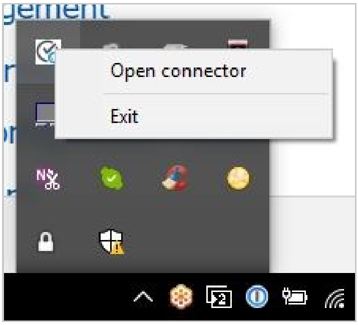


Figure 1: PC Connector icon

   Alternatively, you can double-click the PC connector icon from your desktop.
2. Press CTRL + SHIFT + L on your keyboard to automatically start the troubleshooting log. This will log all communication between OnceHub and the connector.
3. Once logging is enabled, reproduce the steps that generated the error.
4. If you are not able to reproduce the error when you attempt this, press CTRL + Shift + U to open the connector's options menu.
5. Check the **Logging** checkbox.
6. From the drop down-menu, select **1 Day** (Figure 2). The logs will generate in the background as you use Outlook and OnceHub. If the issue occurs during these 24 hours, the logs will capture it and give us the information needed.

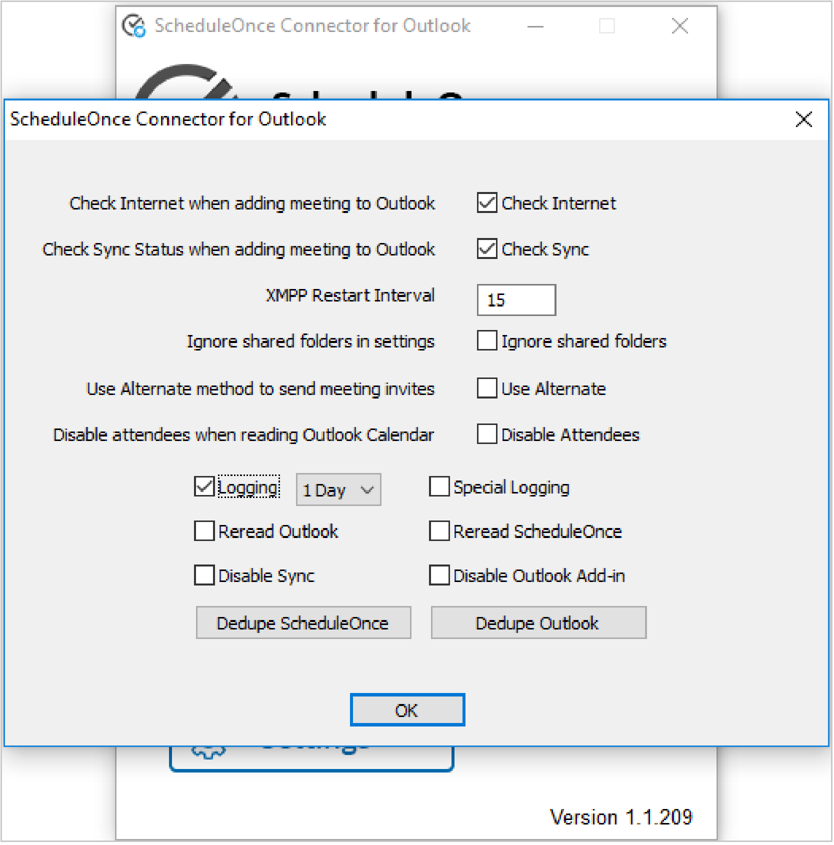


Figure 2: OnceHub Connector for Outlook menu pop-up

7. If the issue does not occur in this time, press CTRL + Shift + U to open the options menu. From the drop-down menu, select **Logging: 5 Days**.
8. Once the issue has been reproduced, click the PC connector icon in the taskbar on your desktop. Then, press CTRL + Shift + L to disable logging. The connector may run slower if logging is not disabled after a log is captured.
9. Press CTRL + Shift + D to access the folder where the log file was created. There are four essential files needed:
   - Scheduleoncec4o.log
   - Recordchanges.log
   - ClxDate-out-.dat
   - ClxDate-in-.dat (not always present)
10. Select these files and zip them to a compressed file. If you are not sure which files should be highlighted, it's okay to highlight all files in the folder and zip them all.
11. Please send the zipped file to us with the following data:
    - A description of the issues you experienced.
    - Your Outlook version.
    - Your mail server: Exchange, Office 365, Outlook.com, or other.
    - Your operating system.

Outlook troubleshooting: The connector is affecting my Outlook peformance

Last Modified on Jun 2, 2023

If you have noticed that Outlook runs slowly or crashes after installing the connector, please follow these guidelines to determine what might be causing the issue.

Number of calendars

You should first check how many calendars you are attempting to sync with OnceHub (see Figure 1). Please note that the connector was designed to sync a single User's calendar(s) with his/her Booking page. Syncing more than three or four calendars, particularly shared calendars, on behalf of non-OnceHub Users is not advised, as it may interfere with the connector's performance and can sometimes affect Outlook performance as well.

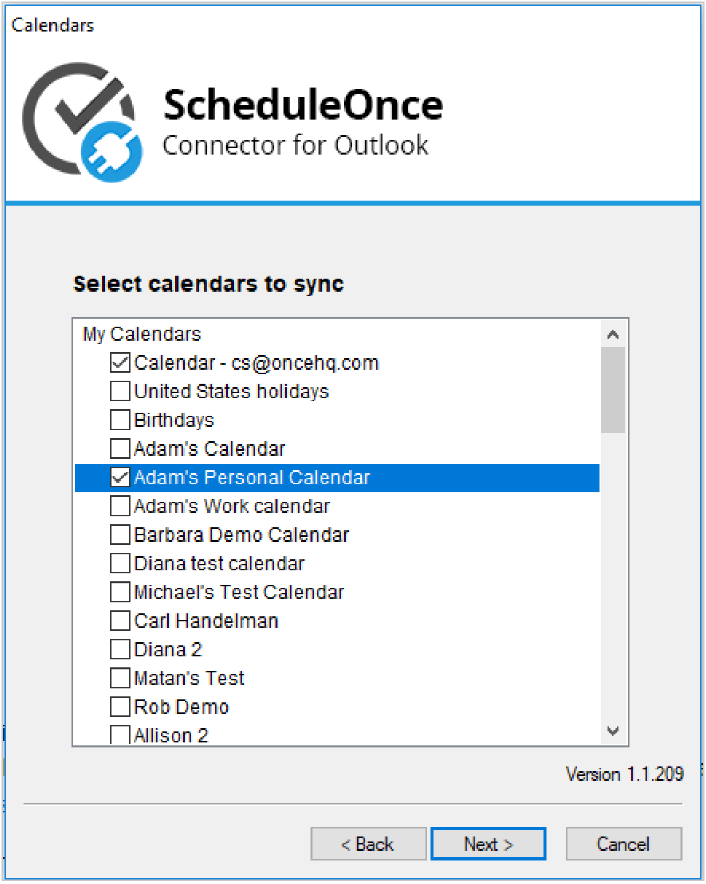


Figure 1: Calendars

Other add-ins

The connector is generally compatible with other add-ins and running the connector in parallel with other add-ins should not affect performance. However, compatibility issues can occur, as is usual when combining multiple software add-ins together that were created by different developers.

The easiest way to check if the connector is conflicting with another add-in is by disabling the OnceHub connector for Outlook add-in. Please be advised that disabling the add-in will also disable real-time sync. To use the connector without an active add-in, please change your syncing mode to auto-sync.

To disable the connector add-in, follow these steps:

- Open the connector and click on **Settings** (see Figure 2).

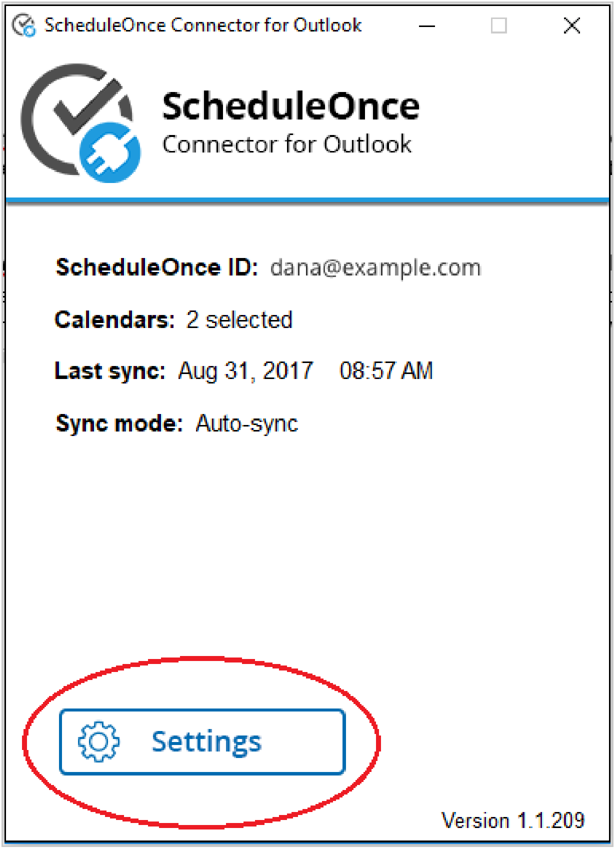


Figure 2: Connector settings

- Go through the setup wizard, select Every 5 minutes on the final step, and click Finish (see Figure 3).

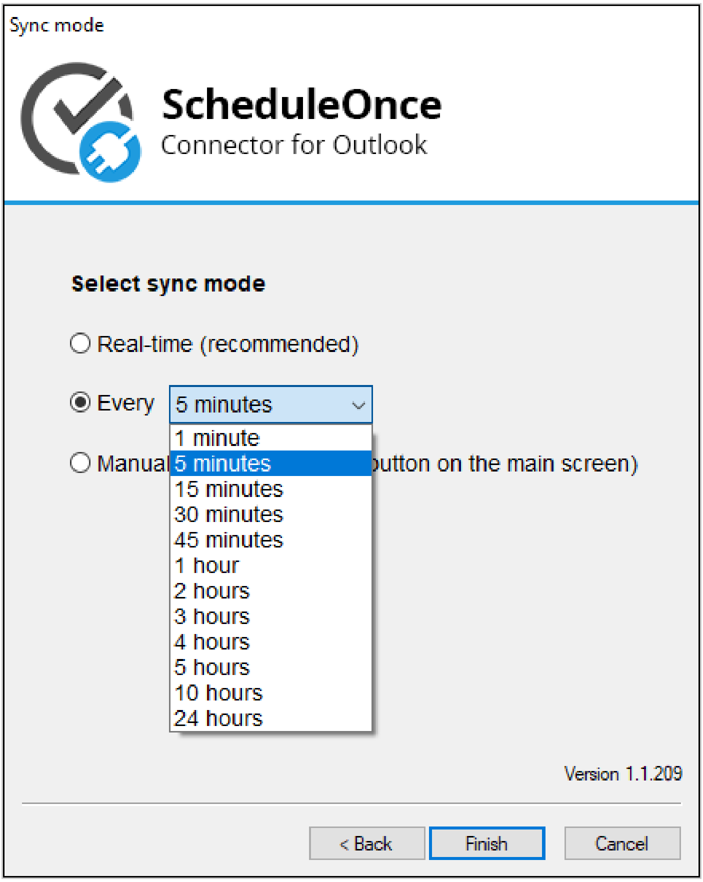


Figure 3: Sync mode settings

- Press CTRL+Shift+U and select the option: Disable Outlook Add-in
- Make a few test bookings in OnceHub and create some calendar events in Outlook to verify all is performing as intended.

Conflicting user permission levels for open Windows applications

Every Windows application can be opened as either an administrator or as a standard user. Ensure that you are opening both Outlook and the OnceHub connector for Outlook at the same level, or the two might conflict and result in crashing Outlook. If you have one open as an administrator and the other as a standard user, this will cause a conflict.

To open an application as an administrator, you can right-click on that application's icon and select Run as administrator.

Contact us

If you are still experiencing performance drops in Outlook, please generate logs and email them to us.
Once you have the logs, please put them in a zipped file and send them to us along with the following information:

- Windows version
- Outlook version
- Screenshot of active add-ins in Outlook (File -> Options -> Add-Ins)
- Are you using Exchange?
- How many calendars are you syncing, and how many of these are shared with you?
- When was the last time you archived your calendar(s)?

Outlook troubleshooting: My Security token is invalid

Last Modified on Oct 13, 2022

If your security token is invalid, please first ensure that you have copied it accurately from the Calendar integration page (see Figure 1). Select your profile picture or initials in the top right-hand corner → Profile settings → **Calendar connection** and check that you copied it with no blank spaces. If you have tried this multiple times and it has not worked, try by manually typing the token instead.

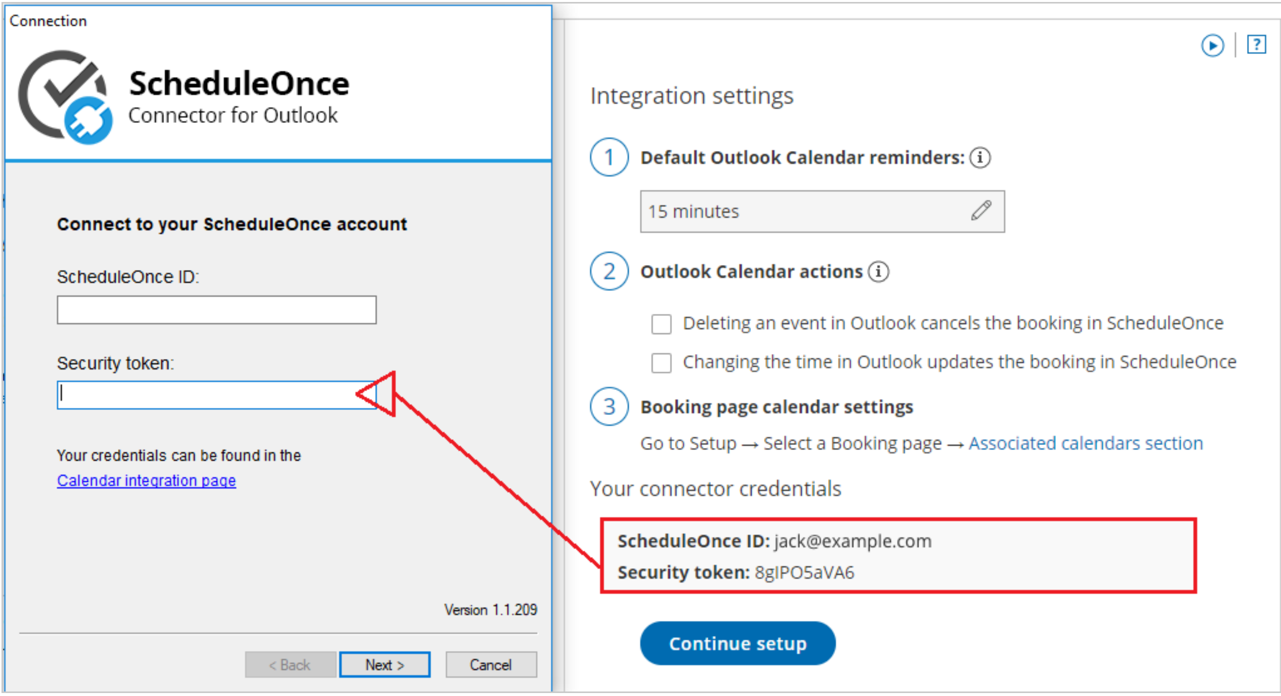


Figure 1: Connector credentials

TLS enabled?

If neither of these work, you should check settings in Internet Explorer to ensure that TLS protocol is enabled. This is a security protocol that allows the security token to work. Windows takes multiple internet settings directly from Internet Explorer options. Even if you never or seldom use Internet Explorer, these options affect your internet connection, so they need to be checked within the Internet Explorer browser.

This is an easy thing to check. Open Internet Explorer and select the Tools gear icon on the top right. Select Internet options (see Figure 2).

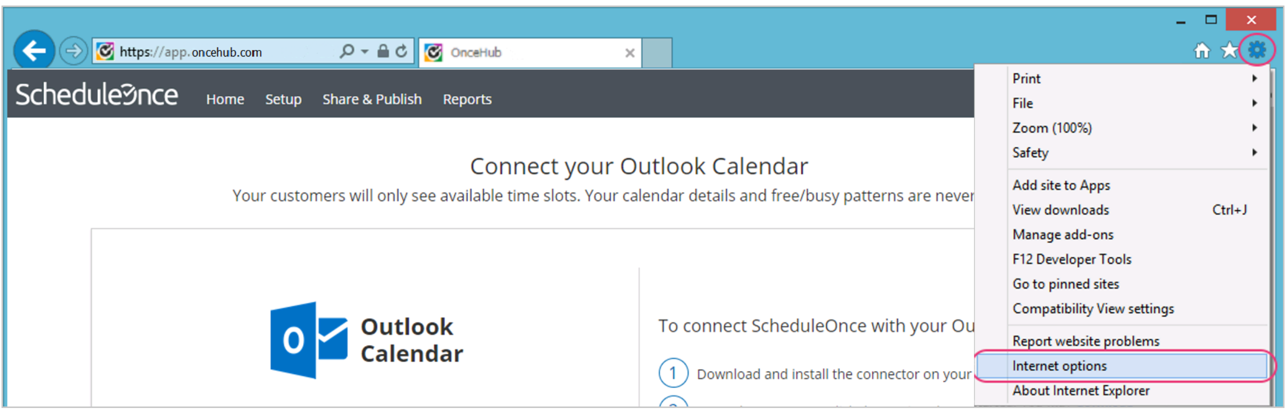
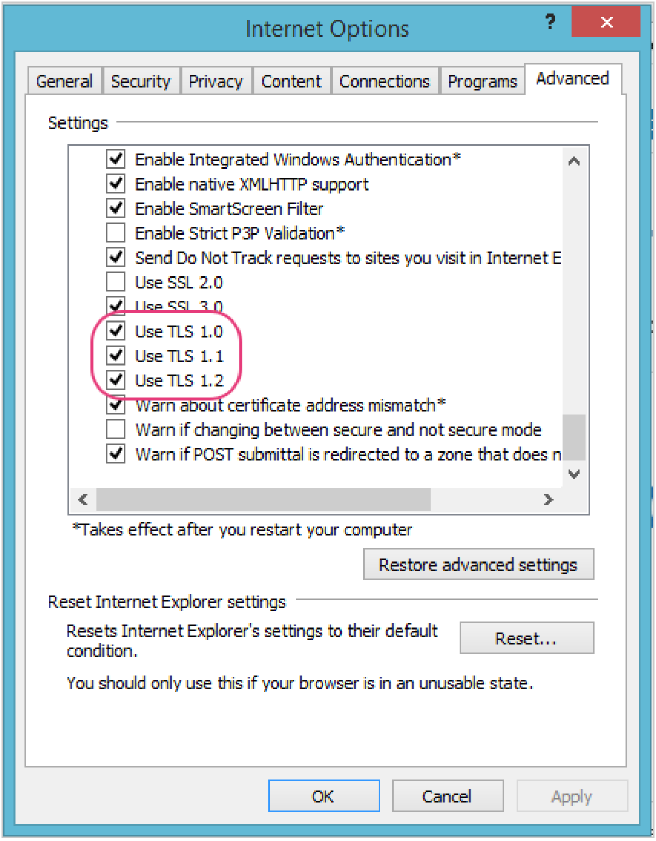


Figure 2: Internet options

In the Advanced menu, please scroll down to the Security section and ensure that the boxes for Use TLS 1.0, TLS 1.1, and TLS 1.2 are all enabled.



Once this is done, open the connector again and see if the security token now works.

Note:

Windows XP is no longer supported by Microsoft. As a result, it does not support updated TLS protocols. Because of this, the Outlook connector will not work on machines running Windows XP.

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Outlook troubleshooting: The selected calendar is invalid

Last Modified on Feb 20, 2020

If you receive the message "One or more selected calendars is invalid" from the PC connector for Outlook, it is due to the calendar ID being changed since the connector was set up (see Figure 1).

Connector with the error message:

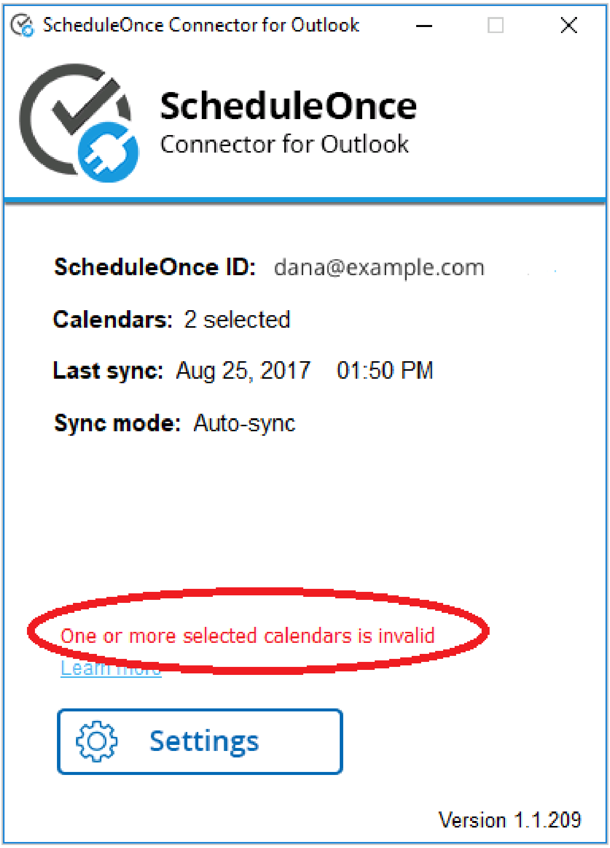


Figure 1: Invalid calendar

This can happen for the following reasons:

- The calendar was deleted.
- The calendar ID was changed.
- Sharing permissions on the calendar were changed and the calendar you are trying to sync with is no longer accessible to you.

To resolve the issue, open the connector, click the Settings button, click Next to see your calendars, and re-select the calendars you want to sync with (see Figure 2). The connector will list all of the calendars which you have read/write permissions.

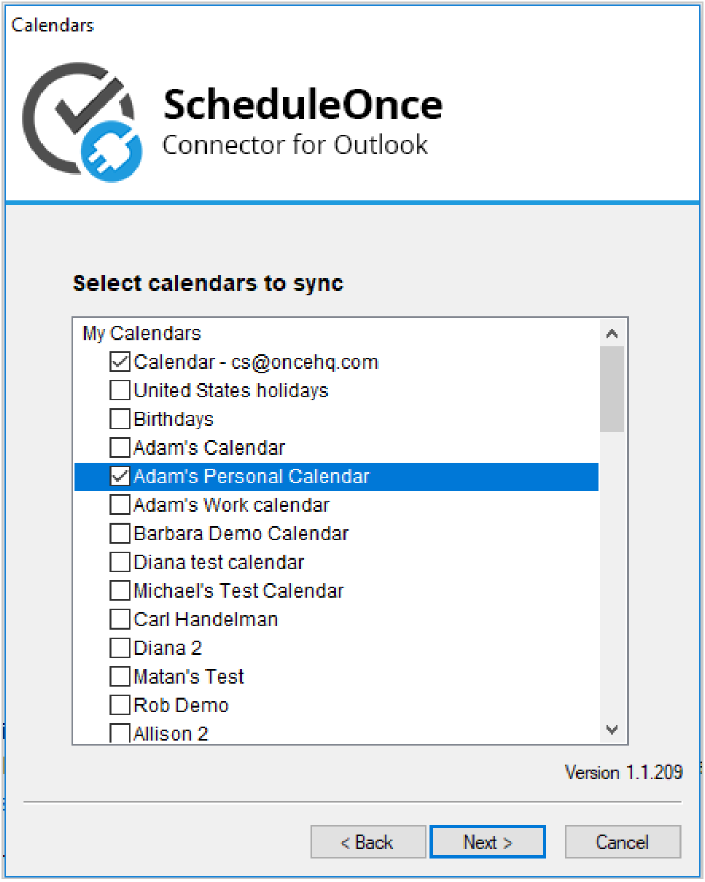


Figure 2: Select calendars

If you want to use a different calendar for your appointments, you can create a new calendar in Outlook and repeat the above steps. If you want to sync with a calendar that is owned by someone else, please ask the owner to share their calendar with you and then repeat the above steps. Learn more about sharing Outlook calendars

Outlook troubleshooting: Disabling the Outlook security alert

Last Modified on Jun 2, 2023

If the OnceHub team has prompted you to use an alternate method for sending meeting invites, this might cause an Outlook security alert to pop up, which will cause Outlook to ignore the connector. This happens because you are essentially using the connector to send an email (the calendar invite), so it raises a red flag for Outlook's basic security system.

You can change this by disabling the security alert. When there is no real-time protection in effect against viruses and spyware, Outlook provides a basic level of protection against add-ins by displaying the security alert popup.

You might receive security notices like these:

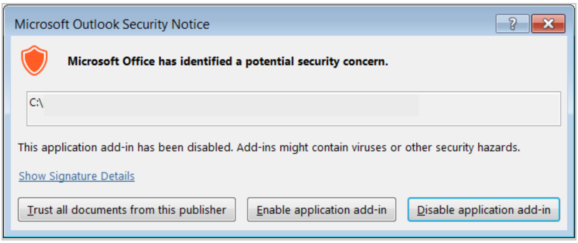


Figure 1: Outlook security notice

When you see this message, it is vital that you take action, because Outlook will block the sync between OnceHub and Outlook if you do not.

You can disable this security alert in the Outlook Trust Center. In Outlook 2007, this is found in the Tools menu. If you are using Outlook 2010 and 2013, you can access the Outlook Trust Center in the File -> Options area. For more information, please see Microsoft's documentation for Outlook 2010 and 2013. You will need to open Outlook as an administrator, which you can usually do by right-clicking the file name and selecting to open as an administrator.

Outlook troubleshooting: Upgrading the connector with a clean reinstall

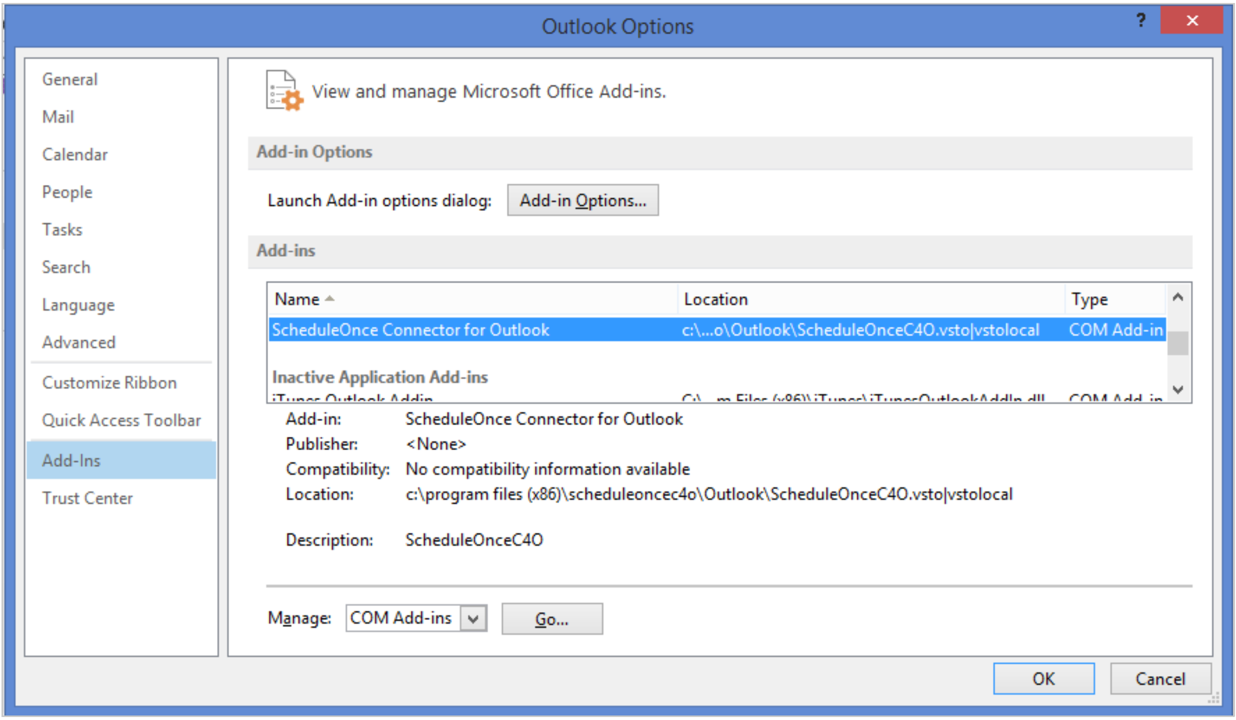
Last Modified on Jun 2, 2023

If the connector for Outlook is not functioning as it should, you may need to upgrade it to the latest version. This can be done by going hovering over your profile picture or initials in the top right-hand corner → **Profile settings** → **Calendar connection**, and upgrading the connector by downloading and installing the latest connector version.

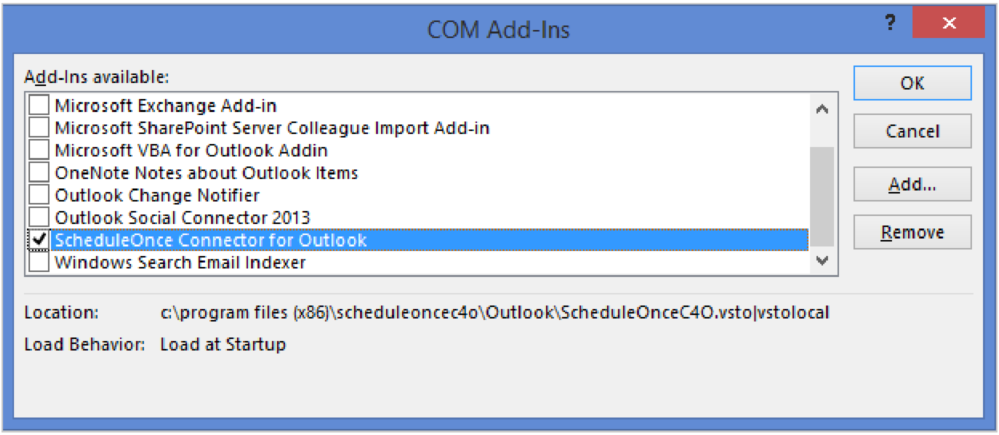
If that fixes the issue, there is no need to read further. If the problem still persists, you might need to perform a clean reinstall:

1. Close the connector and Outlook. If your connector or Outlook are not responding, press Ctrl+Alt+Delete to access the Task Manager. From the Task Manager on your PC, you should end the Outlook and the OnceHub connector for Outlook tasks.
2. The next step is to uninstall the connector from your PC. From your Control Panel, select Programs and Features and uninstall the connector.
3. Now you will remove the connector add-in in Outlook:

   Open Outlook, go to File -> Options > Add-Ins, and select OnceHub connector for Outlook. Click Go.



   - The COM Add-ins window appears and lists the add-ins in Outlook.



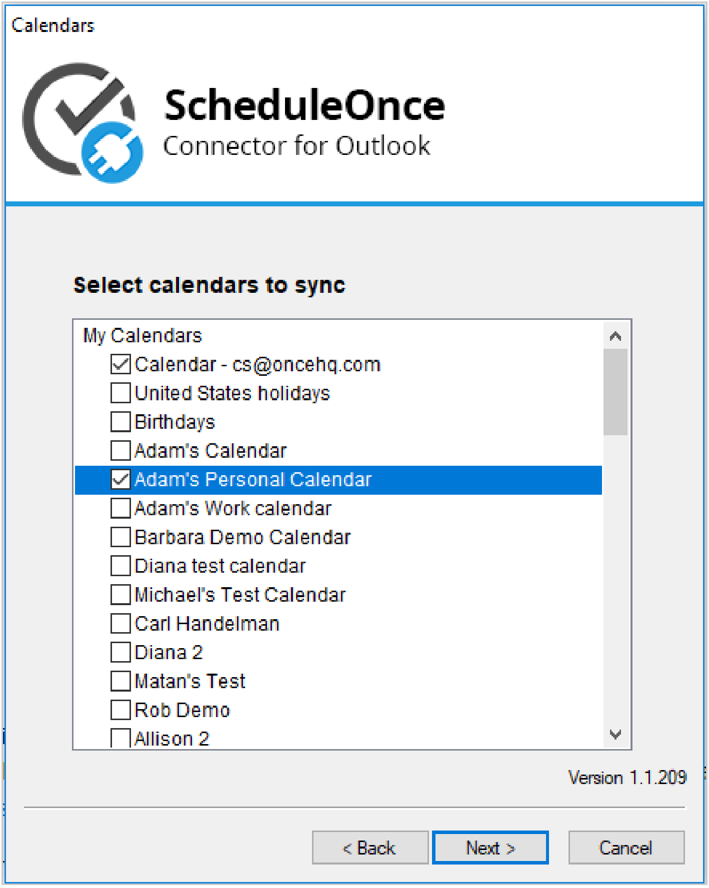
- In the COM Add-in window, check the OnceHub connector for Outlook, click Remove, and finally OK.

4. Restart your computer.
5. When your computer is back up, sign in to your OnceHub account and re-install the Outlook connector
6. If you still experience issues, you should generate a connector log and send it to us.

Outlook troubleshooting: No Outlook calendars are showing in the Select calendars to sync step

Last Modified on Jun 2, 2023

The calendar selection step allows you to choose which calendars you'd like to sync with OnceHub.



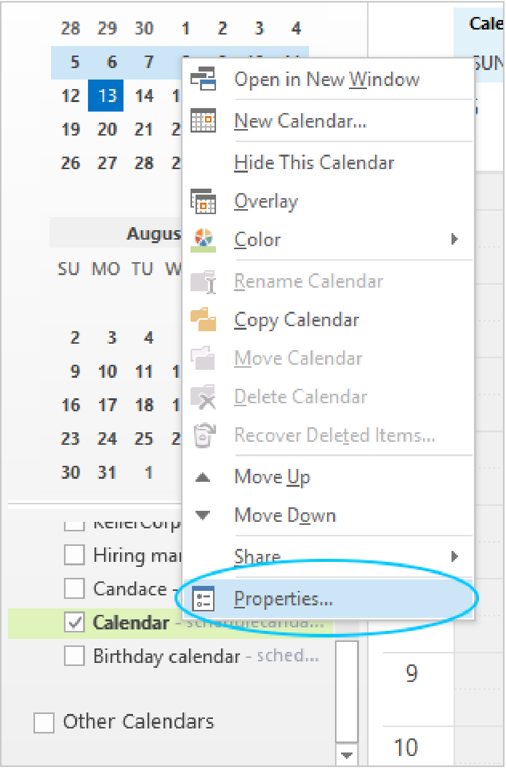
If it appears blank, there are a few steps you can follow to determine what might be causing the issue.

Quit and reboot connector

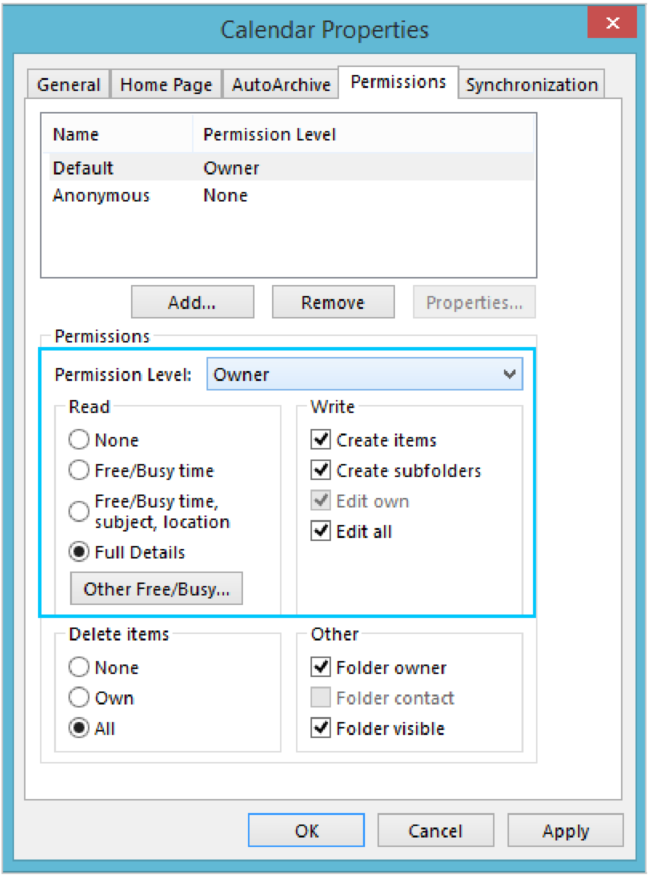
The first recommendation is to quit the connector and reboot it. You can do this by right-clicking on the square, blue and white SO icon in your taskbar icons. Select Exit. You can re-open the OnceHub connector for Outlook through the shortcut created on your Windows Desktop.

Check permission settings

If you are trying to sync Microsoft Exchange shared calendars, check the permissions of the calendar(s) you are syncing with OnceHub. In Outlook, right-click on the relevant calendar. Go to Properties -> Permissions -> Permission level.



Ensure that you still have read/write capabilities as the Owner or Publishing Editor of the calendar.



Try repairing Outlook

Outlook files can sometimes become corrupted, preventing the connector from reading the calendars correctly and displaying a blank screen. Performing a quick Outlook repair will usually take no more than 5-10 minutes and can help with connector issues as well as general Outlook performance issues. Learn more about repairing

Building a chatbot

Last Modified on Jan 6, 2025

This article is a step-by-step guide to help you get started with chatbots, from building a chatbot from scratch, to publishing it on your website and gaining new contacts easily!

How chatbots work

You can use chatbots for many things, but we think the best and most effective way to use chatbots are to engage with visitors, asking questions that qualify them to schedule meetings with your team or chat with them further.

After answering some questions, their answers determine whether they’re offered a time to schedule with your team or the opportunity to chat live with them.

We understand that personalization leads to better engagement in your visitors' experience. You can create a different chatbot for each experience your visitors may have, according to their needs and your business objectives. You can also create one chatbot with multiple paths, taking your visitors through the best interactions for them with conditional routing.

This allows you to customize their experience seamlessly, providing the most effective messaging for that specific audience under the given circumstances. It also raises the likelihood of identifying the right prospects for your team to engage with as high-quality leads.

Building a chatbot

Step 1: Create your chatbot

You can create as many chatbots as you like for different pages on your website. Read through the steps below to learn how to build a chatbot.

See how to create a chatbot

You can access your chatbot builder by clicking the **Chatbots** icon on the left.

Here, you'll find the lobby, where you can create new and manage existing chatbots. You can search through your existing chatbots by typing the name of the chatbot (or, if you're an account administrator, the owner's name) in the search box, or by using the chatbot's share link, which you can see under an existing chatbot's title.

Start from scratch: You'll start building your chatbot with a blank canvas.

Use a template: Choose chatbot one of our many, ready-made templates. The correct template saves time by providing an example chatbot you'll adjust according to preference.

Duplicate an existing chatbot: If an already-existing chatbot is similar to what you're wanting, you can duplicate that chatbot and tweak it to suit your preferences. Click the three dots on the right-hand side of that specific chatbot and select **Duplicate**.

Read on to learn more about building a conversation

Step 2: Creating a conversation

A chatbot's building blocks are 'interactions'. The way you order and route these interactions (which we'll teach you about in this article) shapes the type of conversation your visitors will have with the chatbot.

These can be dragged and dropped from the **Add interaction** panel on the right of the chatbot builder. Their position in the builder, or their routing, will determine the order in which they appear to a customer.

Learn how to create a conversation

Drag and drop interactions into the chatbot's column in the order you want them to appear to your visitors.

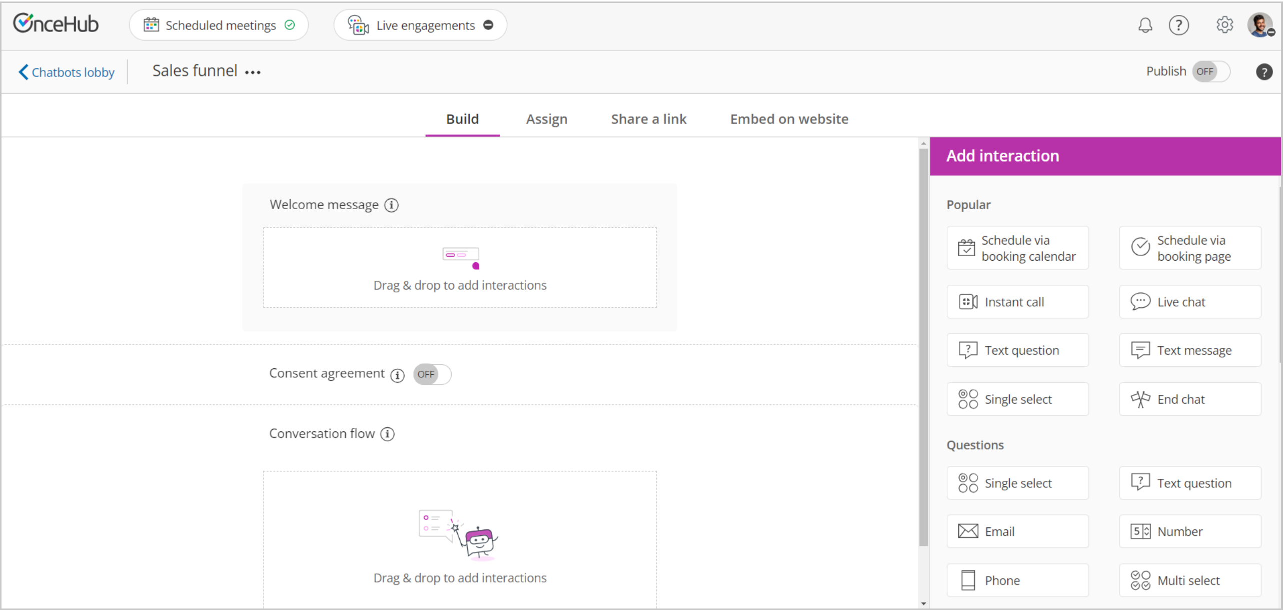


Figure 1: Add an interaction to your chatbot builder

Interactions can be questions, messages, or actions, including offering scheduling to your visitor.

You have many interaction options for your chatbot, allowing you to:

- Ask questions to qualify visitors
- Send follow-up questions depending on their answer, to personalize the experience further
- Offer scheduling or live chat to qualified visitors, based on their answers

Conversations are divided into three areas in the builder: The **welcome message**, the **consent agreement**, and the **conversation flow**.

Welcome message

The **Welcome message** interaction is the first your visitor will see from you. It grabs their attention and prompts their engagement. When they click on an answer, your widget opens fully so your chatbot can engage in a conversation with them.

- Can include up to two interactions.
- Can pop up on the visitor's screen, grabbing their attention.
- Can only be **Message** or **Question** interactions.

To build your welcome message interaction, drag and drop an interaction from the **Add interaction** section.

Consent agreement

Some regions, such as the EU, require you to gain consent before using a visitor's personal information.

To keep things simple, OnceHub provides default text you can use to request their consent. Simply toggle the consent agreement on or off depending on your needs.

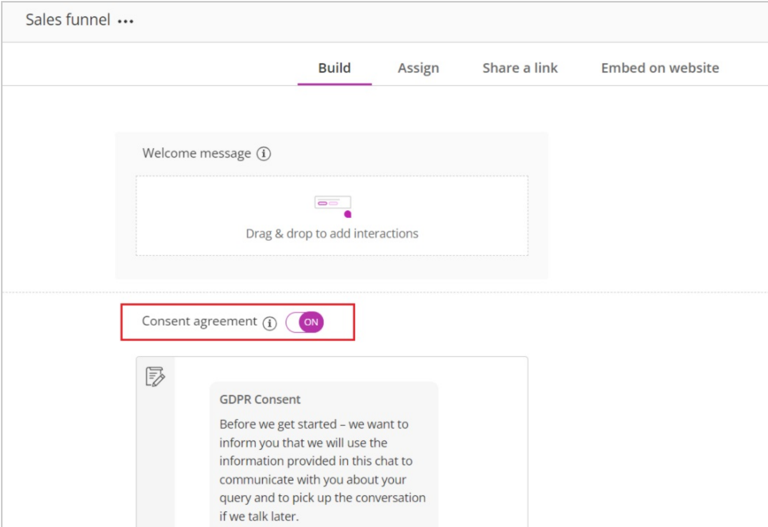


Figure 3: Consent agreement

Learn more about collecting consent for processing under the GDPR

You can customize your consent messaging by going to your **Account** (the gear icon) and selecting **Visitor consent & cookies**.

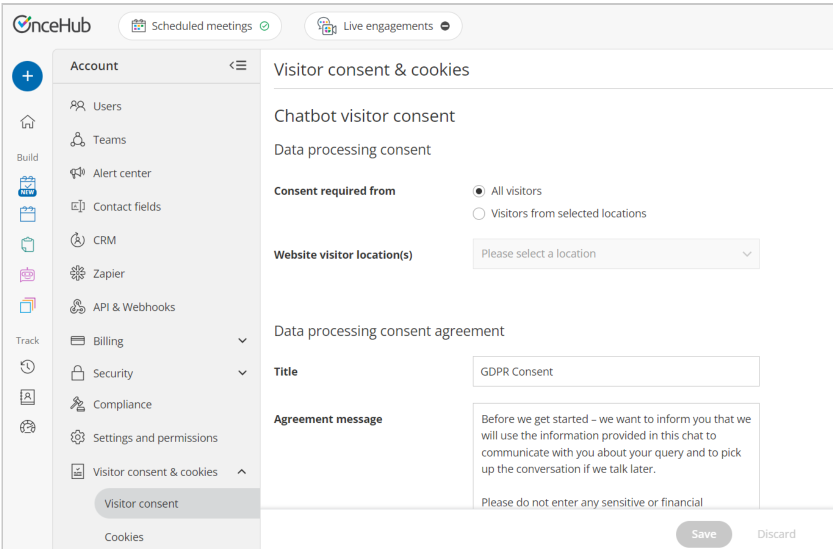


Figure 4: Customize your privacy messaging

Conversation flow

You can drag and drop the rest of your conversation's interactions into your conversation from the **Add interaction** section on the right (if you click an interaction, it will join at the bottom of the conversation). They will be routed according to the rules you configure (see step 3 below).

Interaction options

Question types

Questions require the visitor to respond before continuing the conversation.

You can choose from various question field types:

- **Single select**: Multiple answer options. The visitor can only select one answer.
- **Text question**: Let the visitor answer in their own words
- **Email**: Request the visitor's email address
- **Number**: The question has a numerical answer. You can define a minimum and maximum amount.
- **Phone**: Request the visitor's phone number.
- **Multi select**: Multiple answer options. The visitor may select one or multiple answers.
- **Date & time**: The question has a date and time (both) for an answer. Optional: Require the date and time to be in the future.
- **Date**: The question has a date for an answer (for example: a birth date).
- **Time**: The question has a time for an answer.

Chatbot responses

Each question can have a defined chatbot response after your customer responds, keeping the conversation collaborative and relevant to their answers.

When using the single select or multi select fields, each possible answer can have a unique chatbot response.

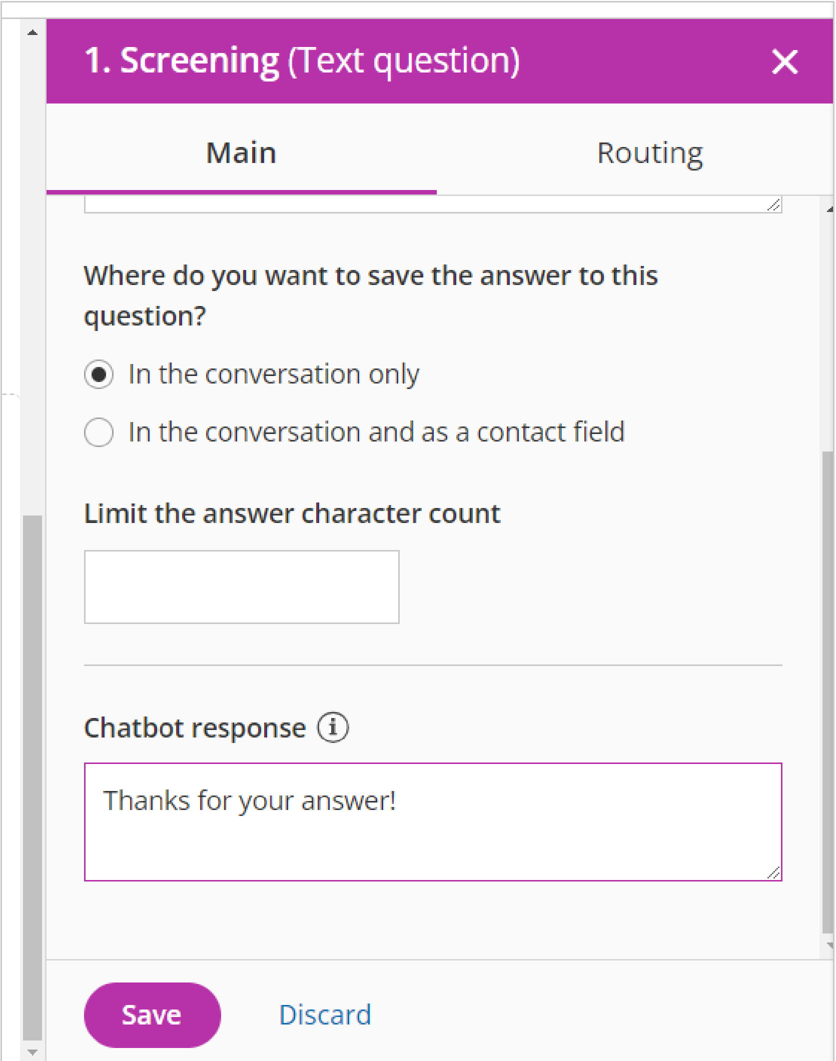


Figure 6: Chatbot responses

Messages

Messages help you keep your interactions conversational, preventing the visitor from feeling like they're filling out a form. Effectively used message interactions raise the visitor's engagement in the conversation.

You can include various messages in your conversation:

- **Text message**: Inform the visitor of something in a text message interaction, without requiring an answer to continue. For example, you can provide information you've determined is relevant to them, based on their responses to previous questions.
- **URL**: A URL with preview image, prompting them to visit a specific website.
- **Image**: Display an image.
- **Video**: Upload a video they can watch inside the chatbot widget.
- **Document**: Upload a document they can download from the chatbot widget.

Actions

- **Schedule via booking calendar**: Offer them to schedule with you through a booking calendar, without leaving the chat widget. You can offer scheduling to everyone or only route qualified visitors to this action.
- **Instant call**: A request for an instant call will be sent to all Users with a live engagement license. If no User

responds, the bot conversation will continue.

- **Schedule via booking page**: Offer them to schedule with you through a booking page, without leaving the chat widget. You can offer scheduling to everyone or only route qualified visitors to this action.
- **Live chat:** Offer to chat live with your visitor. The chatbot will connect them with a member of your team to chat one-on-one and answer their questions or move them to the next step in the sales process.
- **AI conversation**: This interaction hands off the conversation to our AI-powered bot.
- **Contact status**: Indicate a status (Qualified, Marketing qualified, Sales qualified, or Disqualified) for the contact so you can set other processes in motion on your end based on that status. You can also use this data to optimize your chatbot flow, determining the efficiency of your campaigns.
- **Email alert**: Send an internal email alert, invisible to your visitor, when they reach a specific part of the conversation. You can alert people on your team about qualified visitors who answer in a specific way.
- **Chat rating:** Ask the visitor to rate their experience. They can choose between one and five stars, from poor to excellent.
- **End chat**: End the chat completely. Your chatbot will not send any more interactions for this conversation. You cannot route the End action to another interaction.

Ending the conversation

When you're ready to end the conversation, we always recommend using the **End chat** action. If you do not use this action, the conversation will end abruptly after it reaches its final interaction. Remember, you cannot route the **End chat** action to another interaction.

The right farewell message will keep your visitor's experience courteous and enjoyable.

Step 3: Routing your interactions

You can route your interactions by choosing conditions and deciding which interaction they should see next.

You can get really specific about the routing logic you want. The logic can depend on how your visitor answers the current question or a previous one. You can also base the logic on a contact field already saved to their contact record (for instance, the **Company size** field).

Learn how to route your interactions

You can route your interactions by choosing conditions and deciding what your visitors should see next. Either create your next interaction as you route to it OR route to an interaction you've already created.

How can routing be used?

Qualify a website visitor during the conversation

To keep your team working efficiently, you may not want to meet with every website visitor, but may place high value on scheduling a meeting with qualified visitors. You can ask targeted questions in your chatbot's conversation, routing them either to interactions that do not offer scheduling if you determine this is suitable, or to a scheduling or live chat interaction if they do qualify to meet with your team, based on your criteria.

Set the path for the conversation

You can provide the most optimal conversation for a specific website visitor by routing them to the right interactions. This can be based on the options the website visitor selected in a previous or current interaction, or based on information you may already have about them.

You can route to the next interaction in three different ways:

- Route to the next interaction in the order
- Always route to specific interaction
- Route to interactions based on rules
  - Route based on this interaction's answer
  - Route based on a previous answer
  - Route based on live chat agent availability
  - Route based on a contact field (for example, their company or team size)

Read on to learn how each routing style works.

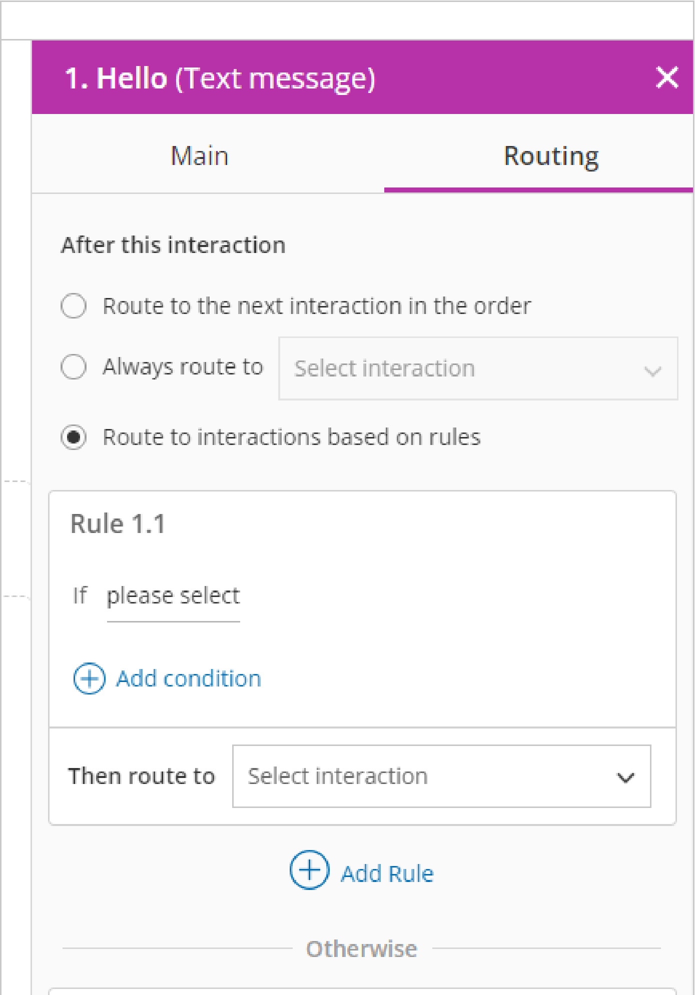


Figure 1: Route to interactions based on rules

You can access your routing by selecting a specific interaction and clicking on the routing tab.

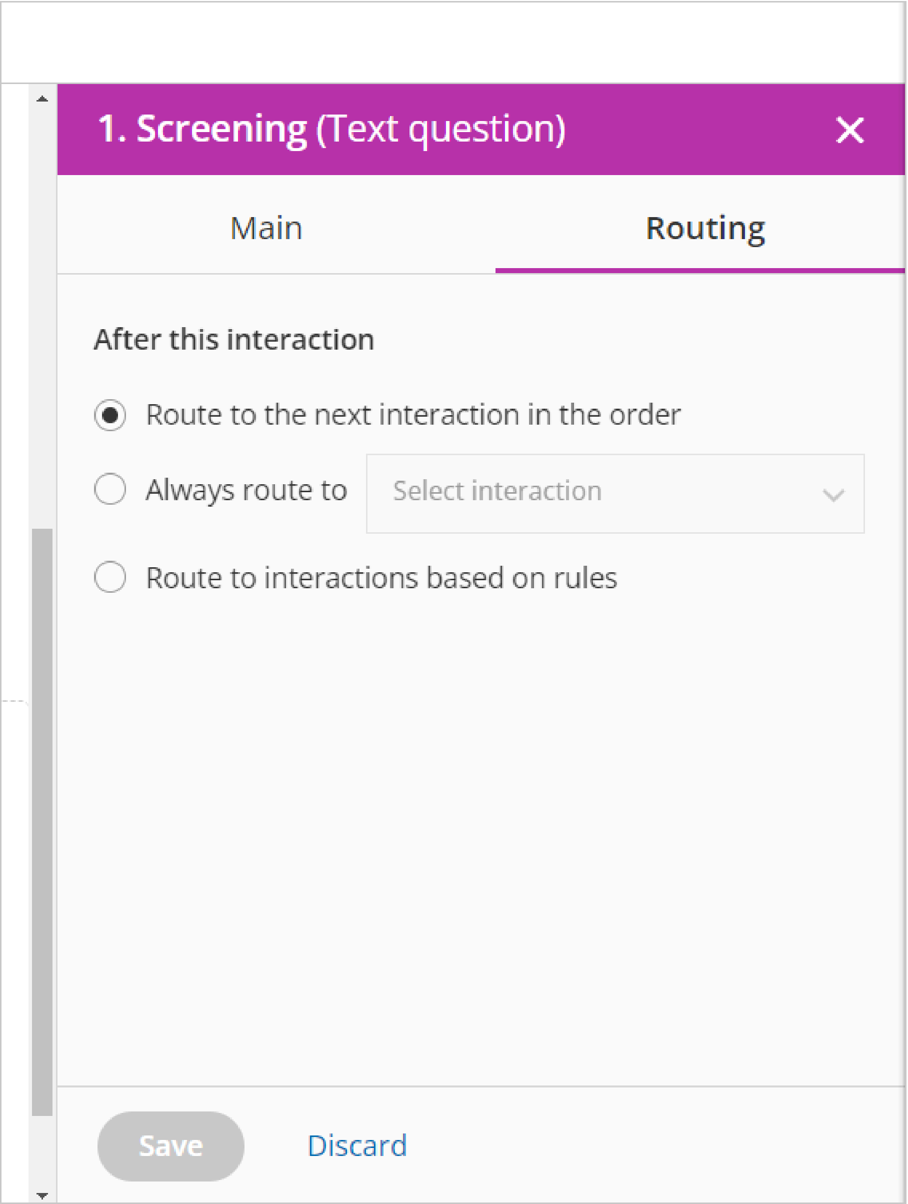


Figure 2: The Routing tab

Route to the next interaction in the order

Select this option if you want the visitor to see the next interaction in the chatbot builder. Remember to click **Save** at the bottom of the panel.

Always route to specific interaction

If you always want your visitor to see a specific interaction next, no matter the audience's answer:

1. Choose **Always route to specific interaction**.
2. From the drop-down menu, select the interaction you want your visitor to see next.
3. Click **Save** at the bottom of the panel.

Route to interactions based on rules

If you'd rather send your visitors down one interaction path if they answer a question a certain way, or another path if they answer differently, select **Route to interactions based on rules**. You can add as many rules, or conditions to one rule, as you need to help refine the routing experience,

This answer

If your visitor's next interaction should be based on how they answer the current question:

1. From the **If** drop-down menu, select **This answer**
2. Select a variable (is; is not; etc.)
3. Choose which answer is relevant
4. From the **Then route to** drop-down menu, select the interaction they should see next based on your rules.

If you like, you can route to a different interaction for every possible answer provided.

Note that this option is only available in question interactions.

Previous answer

If your next interaction should be based on how they answered a previous question:

1. From the **If** drop-down menu, select **Previous answer**
2. From the drop-down menu, select the relevant previous answer.
3. Select a variable (is; is any of; has any value; does not have a value)
4. From the **Then route to** drop-down menu, select the next interaction your visitor will see.

Live chat

You can route to live chat with your chatbot based on the availability of the live chat agents on your team.

If you want your high-quality leads to get in touch with you as possible, live chat can provide the experience your visitors desire while reducing your time to engagement. Read the next step for more details on how to use live chat.

Contact field

If this visitor already had a conversation with your chatbot on a previous visit, you may have saved contact fields from it. You can route to the next interaction based on that saved contact field.

1. In the routing tab, select **Route to interactions based on rules**
2. From the **If** drop-down menu, select **Contact field**
3. Choose a contact field, then a value.
   - If you want to use more than one contact field, click **Add condition**
4. From the **Then route to** drop-down menu, select the interaction you want the visitor to see next.

The routing map

At any time, you can use the routing map to visualize the routing paths that you have created. Near the top of the chatbot builder, click **Routing map** to see a visual representation of all the interactions in the chatbot, and how they are connected to each other through routing.

You can click and drag individual interactions to re-arrange them. Illogical routing, such as an interaction that doesn't have any routing leading to it, will be highlighted with an error symbol, allowing you to make sure there are no issues in your routing.

Clicking on individual interactions allows you to set their routing, as described in the steps above.

Click **Back to builder** near the top of the routing map to leave.

Examples of routing scenarios

Offer to speak with them in live chat

If you want to get in touch with high-quality leads as soon as possible, live chat can provide the experience your visitors desire while reducing your time to engagement. Once you qualify visitors through the chatbot conversation, you can route them to a live chat action, where they will be asked if they'd like to chat live with a team member. This way, you can answer queries immediately from people seriously interested in your product.

You can make this routing dependent on a specific live chat team's availability, so it only suggests live chat when someone on that team is available for chat.

Company size

Based on a visitor's known company size, you can qualify visitors for scheduling.

If you want to schedule an appointment (sales discussion, demo, consultation, etc.) only with qualified visitors, you can ask targeted questions and route them to an interaction where they are offered to schedule with you.

If they don't meet your organization's qualifications for a scheduled appointment, you can instead route them to an alternative option (recorded demo, help center, etc.).

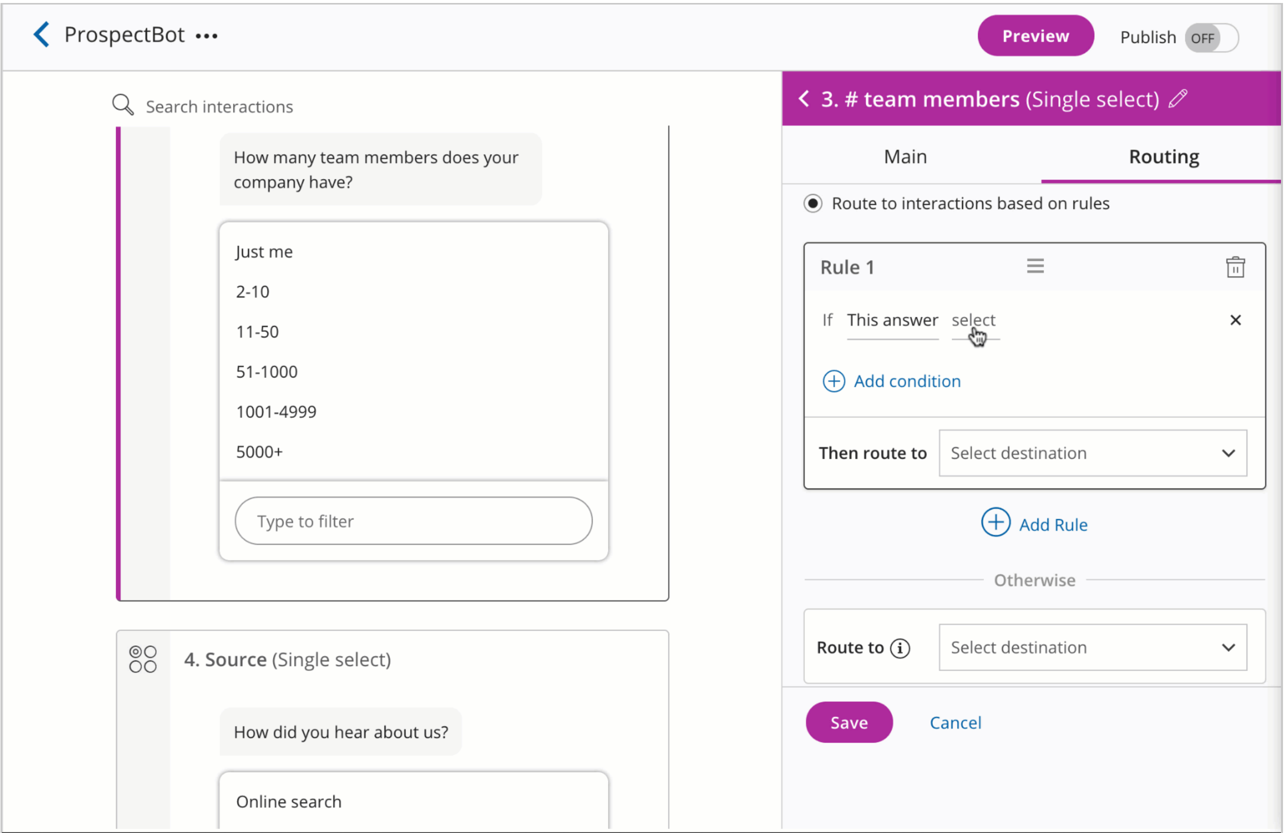


Figure 4: Offer scheduling to qualified visitors

Schedule with the right team

Perhaps your team distributes prospects through regional teams. In this case, you can detect their location and route them directly to schedule with the relevant regional team. This can be based on their country, state, national region, international region, or any other criteria you define.

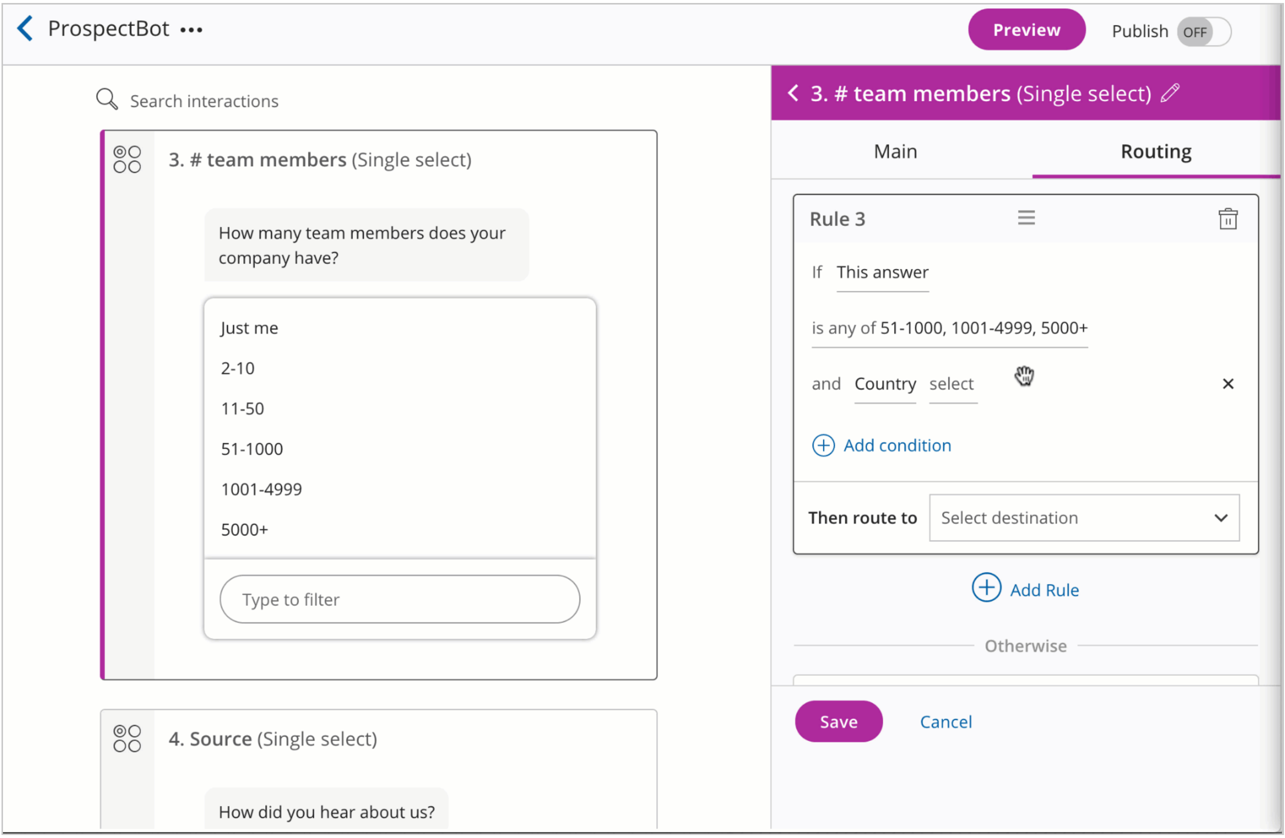


Figure 5: Schedule with a regional team

Send your team an internal email alert

You can add internal email notifications at any point in the conversation so the right people stay updated on your new lead and their engagement with you. The email alert action is 100% internal to your team. Your visitors will not see this interaction on their end and they will not receive any notifications from it.

Route to the email alert action at the right time in the conversation. This may be a critical qualification interaction, such as team size or a specific product they're interested in learning more about.

Route to different URLs

Depending on an answer, you may wish to provide your visitor with a URL to one site or another. For instance, if you'd like to promote an article published about your business, you can add a URL message linking to it.

Step 4: Offer scheduling with your chatbot

Your chatbot can identify the people your team should speak to further and offer scheduling to them. Once they qualify, route them to a **Schedule** interaction.

The entire scheduling experience takes place as they chat to the chatbot.

Learn how to offer scheduling

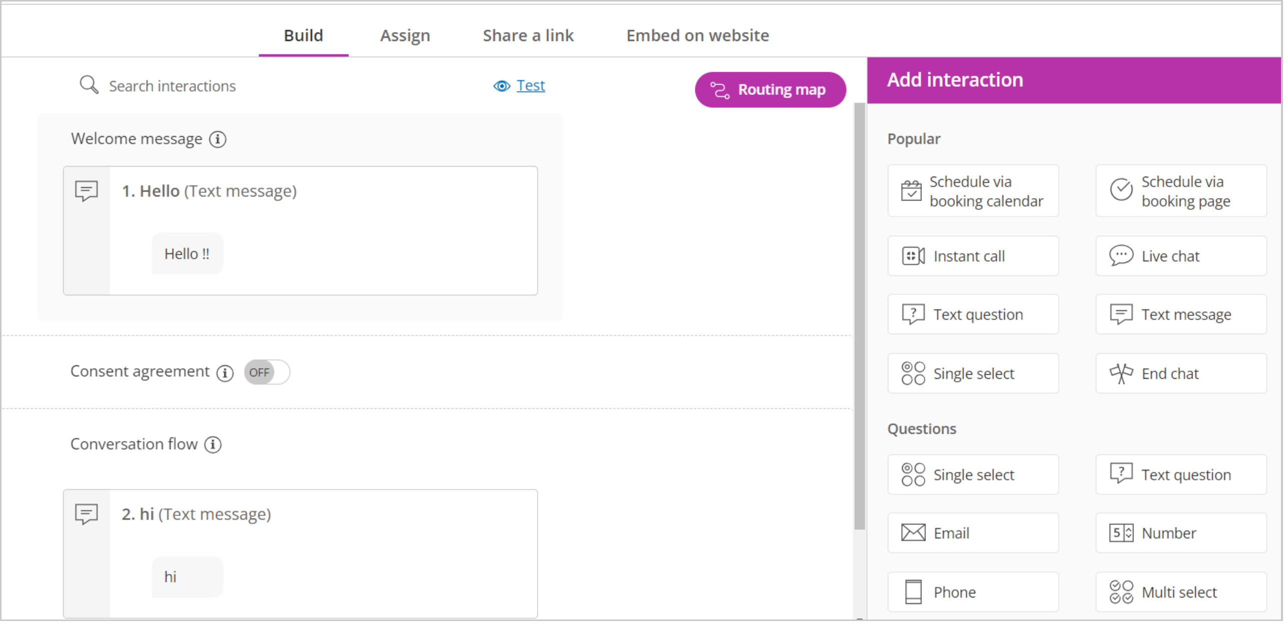


Figure 3: Add scheduling to your conversation

Offer scheduling via booking calendar

To offer scheduling via a booking calendar:

1. In the chatbot builder, add the interaction **Schedule via booking calendar** into the conversation flow
2. Give it an internal label, and from the **Select a booking calendar** drop-down menu, select the booking calendar that you want your visitors to be routed to
3. If you want to edit the prompts given to your customer, you can change the text under the headings **Name**, **Email**, **Confirmation step**.
4. From the **Routing** tab on the right-hand panel, select the next step you want the customer to see once they have finished scheduling with the booking calendar.
5. Once you're finished with your booking calendar settings, click **Save**.
6. Remember to route to your booking calendar from the appropriate interaction (explained in step 3 above).

Offer scheduling via booking page

Below is a summary of how to add a schedule via booking page interaction to a chatbot, but you can find a more detailed article here.

1. In the chatbot builder, add the interaction **Schedule via booking page** into the conversation flow
2. Give it an internal label, and title, and from the drop-down menus, select:
   - The event type
   - The booking owner
   - Additional team members
3. Once you're finished with your booking page settings, click **Save**.
4. Remember to route to your booking calendar from the appropriate interaction (explained in step 3 above), and from the **Routing** tab on the right-hand panel, select the next step you want the customer to see once they have finished scheduling with the booking page.

Live chat

Once you qualify visitors through the chatbot conversation, you can choose the right time to offer live chat to them. This way, people seriously interested in your product can ask questions to a real person, and move to the next level in your funnel.

The entire live chat experience takes place as they chat to the chatbot.

Below is a summary of how to add a live chat interaction to a chatbot, but you can find a dedicated live chat article here.

First, you will need to make a live chat interaction:

1. In the **Add interaction** panel in the chatbot builder, add the **Live chat** interaction
2. Add an internal label
3. From the **Broadcast to** drop-down menu, choose a live chat team. (See here to create a team.)
4. Add a webhook notification to alert team members to an incoming live chat request
5. Edit the hand-off message if you want to
6. Create timeout settings. These determine how the bot responds when no team member accepts a conversation request.
   - Select a length for the timeout period
   - Edit the timeout message if you want to
7. If live chat times out with no response, the visitor will be asked to schedule a meeting.

Next, with a live chat interaction created, go to the interaction right before you want to switch to live chat:

1. Select **Route to interactions based on rules**
   - From the **If** drop-down menu, select **Live chat team**, then select the relevant live chat team
   - Then select **At least one agent online**.
   - From the **Then route to** drop-down menu, choose either your existing live chat interaction, or click **Create new interaction** and add one.

You should also specify in another rule: If **Live chat** has **No agents online**, that the chatbot should route them to another interaction, such as **Schedule via booking calendar**.

Step 5: Configure assignment for your team

Assigning users to a chatbot shares new contacts out among them. For example, if the chatbot is used as a way of creating new leads for the sales team, then the assignment settings will determine which members of your

Learn how to assign teams to a chatbot

In the **Assign** tab, you can assign new contacts to team members. This means they'll be the owner of that contact in their Activity stream.

From the **Select user(s)** drop-down, click the checkbox for each user that you want to share in the distribution of new contacts. Assigned users are displayed beneath the drop-down menu, and can be removed by clicking the **X** next to their name.

If an administrator has allowed member users to create and manage chatbots, members will be able to see any chatbots an administrator assigned to them. Turn this permission on or off by selecting the gear icon in the top right corner → **Settings and permissions → Member permissions**.

There are three options for distributing the conversation assignment:

- When assigning a conversation to a team member, you can select either a single user or multiple users.
- If you select multiple users on your team, OnceHub will assign the conversations based on round robin distribution.
- If you're offering scheduling in your conversation, you can also opt always to assign the conversation to the booking owner (the person receiving the booking). This will override the other team member selection(s) made on the Assign page. Click the checkbox next to **Always assign new contacts to the booking owner** on the **Assign** page to enable this setting.

If the visitor is new (based on email address provided), the assigned team member will be assigned as that contact's owner in OnceHub.

After assigning a conversation, it will show up under the assigned team member's **My activity** filter in the Activity stream.

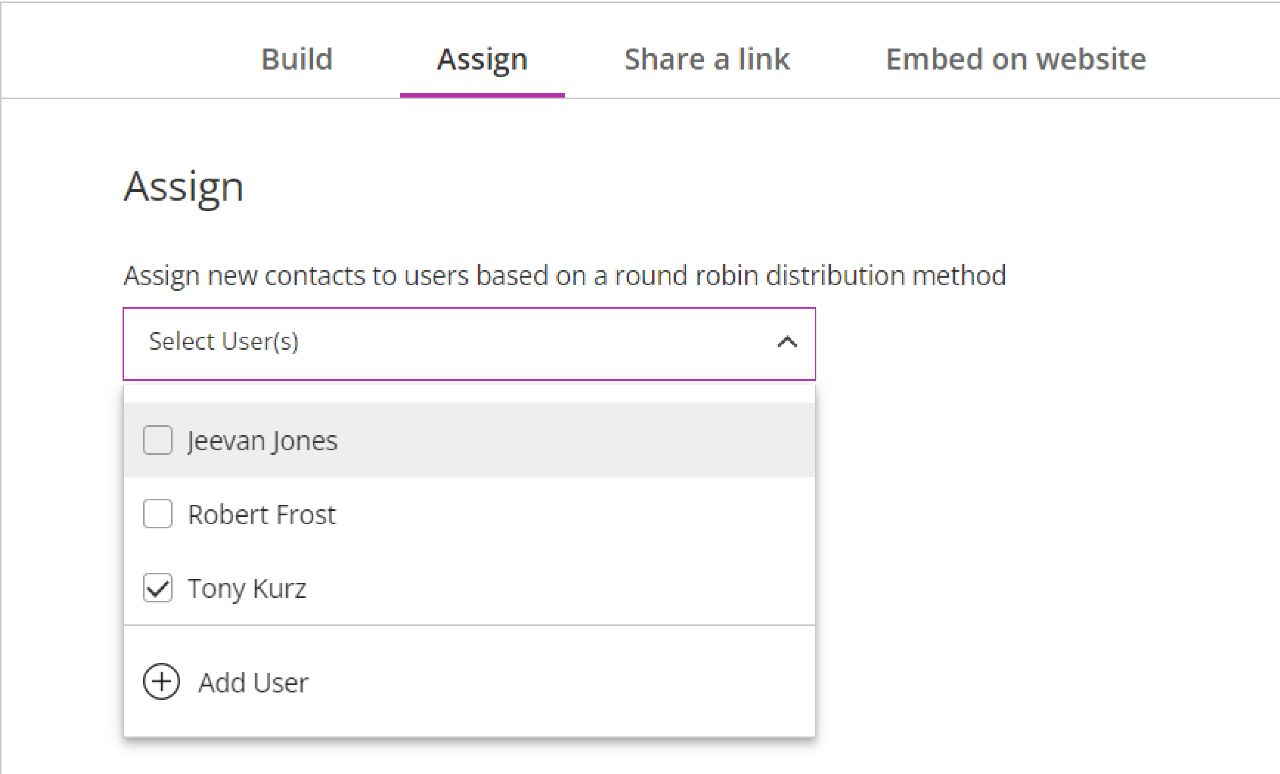


Figure 4: Assigning users to your chatbot

Step 6: Preview your chatbot

Before you share it, you can preview your chatbot. This allows you to interact with your chatbot as a visitor would, allowing you to ensure that your interactions and routing are working as intended.

See how to preview your chatbot

To see a preview, click on the eye icon at any time as you're building your chatbot. You can preview everything as your audience would experience it.

Your chatbot will pop up, and you can answer the questions you have set just as your customer would. To start over, for instance, if you want to try out a different routing path, click **Restart** at the bottom of the pop-up.

To exit the preview, click the **X** at the bottom of the pop-up.

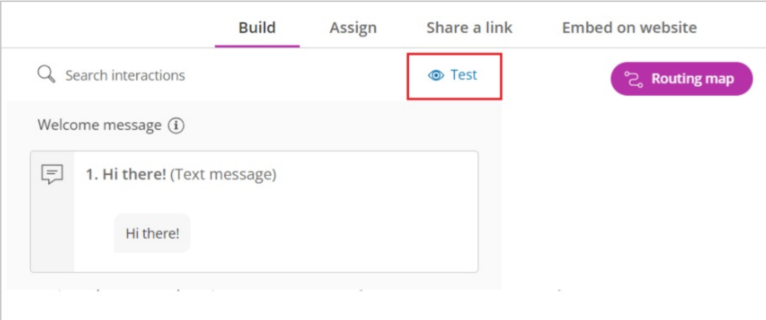


Figure 5: Preview your chatbot

Step 7: Publish and share your chatbot

When you publish and share your chatbot, visitors will be able to interact with the chatbot and have a conversation.

Learn how to publish and share your chatbot

Once you're happy with your interactions and routing, you can publish your chatbot by toggling it on.

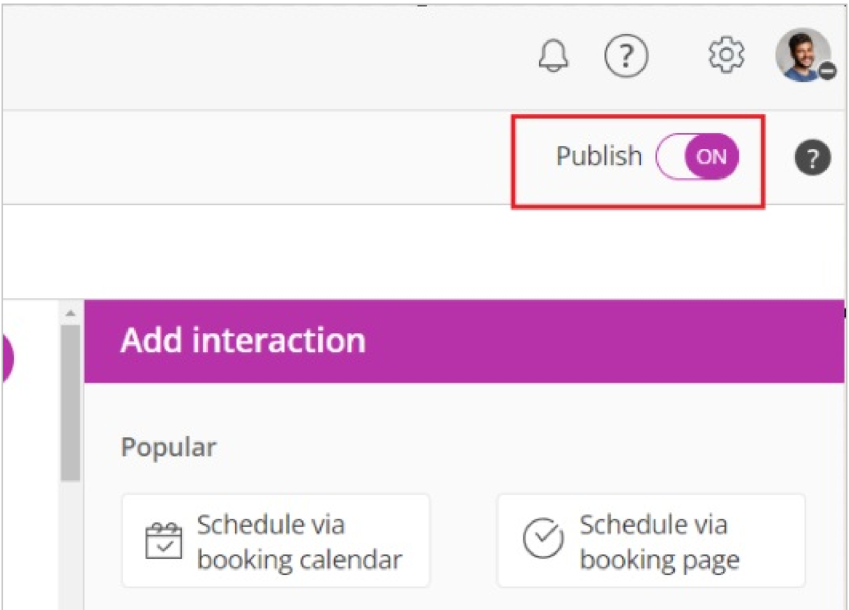


Figure 6: Publish your chatbot

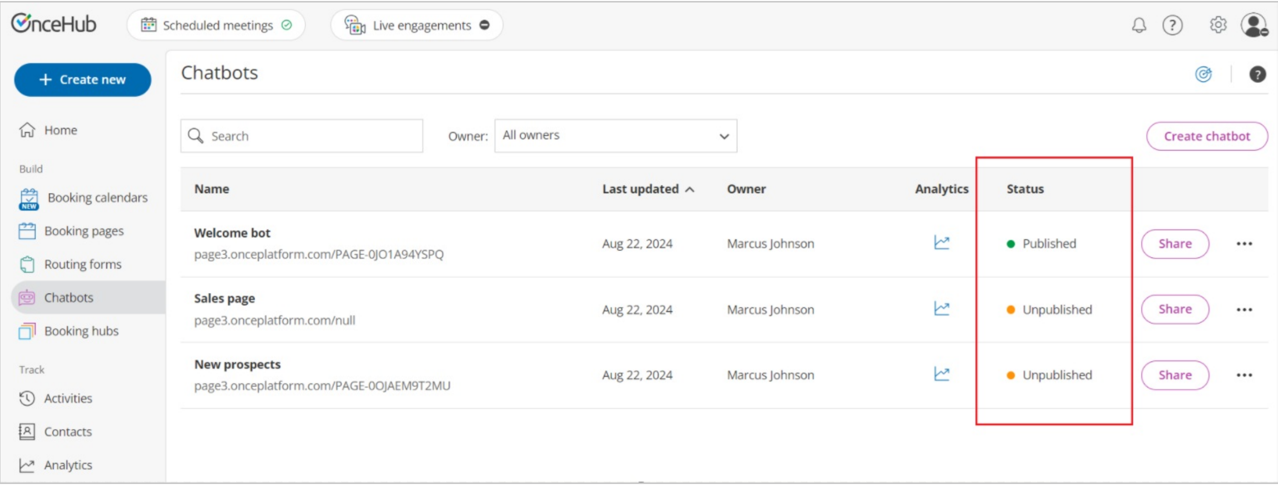


Figure 7: Chatbot status - Published or unpublished

Share your chatbot

Depending on how you want to share your chatbot, click either the **Share a link** or **Embed on website** tab.

Sharing a link directs your customer to a webpage that hosts your chatbot, whereas embedding on a website allows you to host the chatbot on your own website.

Both options allow you to customize the chatbot as you like. Read this article for a more detailed tutorial on how to share your chatbot.

Managing your chatbots

Monitor your stats

You can monitor how your chatbots are performing in the chatbot lobby. Hover over the analytics icon in the **Analytics** column, where you will see a report of these statistics:

Conversations started - How many visitors engaged with the chatbot, replying one or more times.

Conversations completed - How many visitors either went through all the conversation's interactions or reached an **End chat** action, as designed for that chatbot.

Conversations abandoned - How many visitors engaged with the chatbot, replying one or more times, but did not complete the conversation.

Meetings booked - How many visitors booked a meeting.

Emails captured - How many visitors provided their email during the conversation. This could be gathered either through an **Email** interaction or as they book a meeting.

Receiving chat notifications

As you build your conversation, you may add questions or other interactions that are significant to someone on your team. For instance, the visitor reached a certain part of the conversation or answered a question with a specific answer that indicates they're qualified for further sales action on your end, even if they don't book with you during the conversation.

You can add internal email notifications at any point in the conversation, so the right people stay updated on your new lead and their engagement with you. The **email alert action** is 100% internal to your team. Your visitors will not see this interaction on their end and they will not receive any notifications from it.

1. Identify which interactions need an email notification.

This may be a critical qualification interaction, such as team size or a specific product they're interested in learning more about.

2. On the Routing tab, create routing logic to that email alert

For each relevant interaction, you can add a rule that routes the conversation to the email alert action. For instance, you can send an email whenever a visitor reaches that interaction in the conversation, or you can send it only if they answer a certain way.

3. Create the email alert action

You can create this action from the routing tab (**Then route to +Create new interaction**) on the previous step or simply create it by dragging a new email alert action into the conversation.

Be sure you route to the next step on the Routing tab so the visitor has a seamless experience.

More resources to help with chatbots

1. Browse the chatbot articles: For those who like to read everything
2. Integrate OnceHub with Zapier: Track your chatbot campaign effectiveness by sending triggered updates to a third-party app.
3. Hire professional services: Our expert team members can help you configure everything quickly and correctly.

Target an audience with your chatbot

Last Modified on Sep 4, 2024

Using audiences helps you tailor the chat experience for each subset of visitors as they navigate through your website. You can segment website visitors into audiences and target them with relevant conversations. Throughout unlimited websites, you can use this to target audiences in a specific region, associated with a campaign, based on their activity, and other personalized options.

What is an audience?

An audience is a group of website visitors who meet specific parameters, as defined by you in Targeted chatbot settings. This could be where they're located (based on their IP), a specific campaign you're running (identifiable by landing page or UTM code), how many times they've visited your website, or how many times they've engaged with a chatbot on your website.

A visitor's behavior may trigger a chatbot to pop up on the website, prompting a conversation. This happens if they meet the parameters of the audience you've defined and if their behavior fits the targeting parameters. Their behavior is defined based on the time they've spent on the site (for instance, if they've stayed longer than 15 seconds) and the current page URL they're on (for example, the pricing page may be targeted with a different chatbot than the home page).

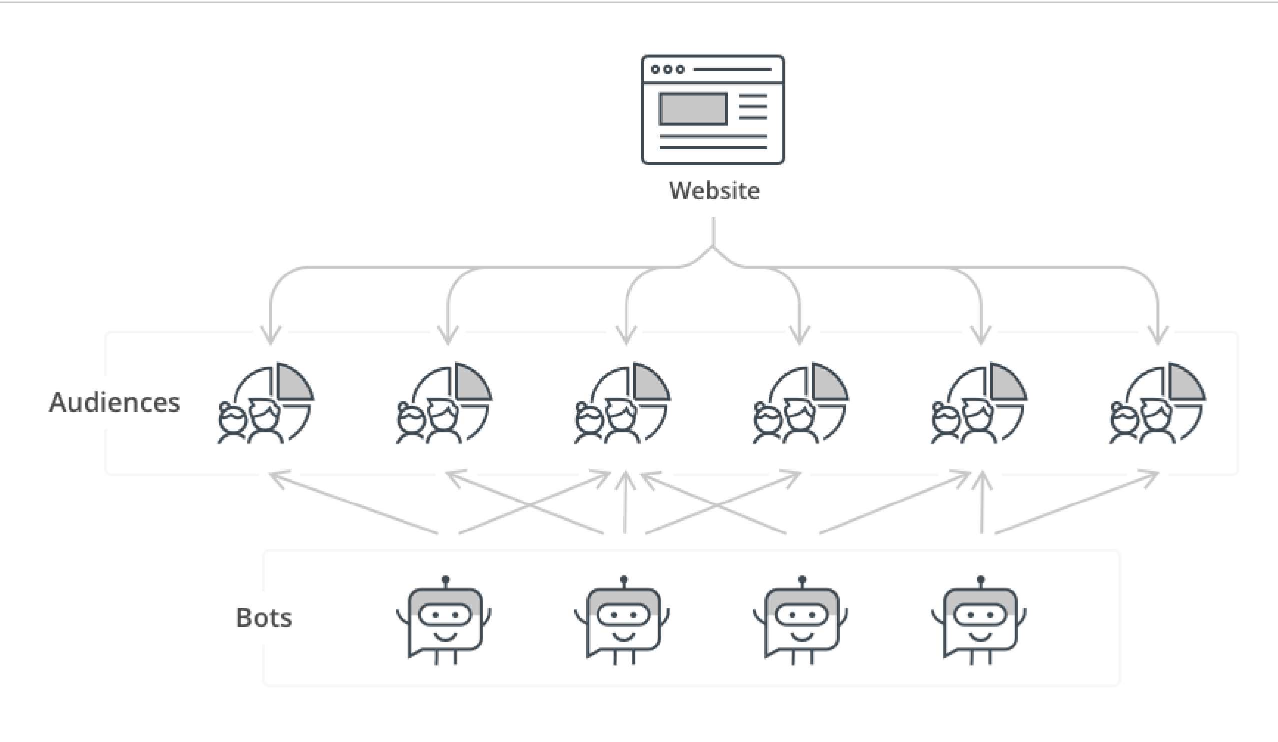


Figure 1: Your website, audiences, and chatbots

Create audiences

OnceHub identifies whether a visitor meets the parameters for a specific audience when they arrive at your website. Each time they arrive, a new session is started. If they leave the page, a session resets 30 minutes after they loaded the last page view.

When you create a new audience, you can configure one from scratch or select from a pre-configured template to edit based on your preferences.

To identify your audience:

1. Open the chatbot you would like to use for targeting an audience.
2. Click on the **Share** tab.
3. Click **Add to targeting**.
    1. You can also reach this menu by clicking **Website embed** (on the left side of the screen, *Figure 2)*.
4. Select the audience you wish to target with this bot.
    1. To build an audience, click on **Audiences** at the menu on the left.
5. Build out the targeting rules you want. You can customize these rules and add multiple flows to help with specific targeting. Under the **Then target with** rule, be sure to select the chatbot you want these rules to apply to.
6. Once you're finished configuring the rules, click **Save** at the bottom of the screen.

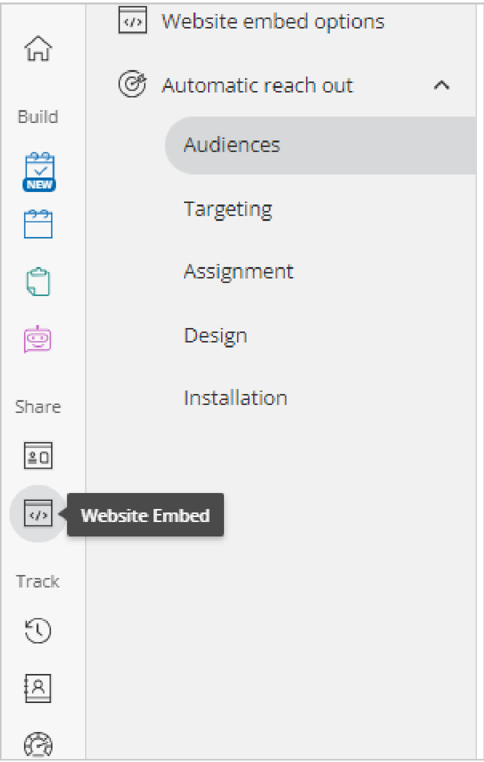


Figure 2: Audience settings

You can create one or more rules for each audience you create, based on multiple parameters.

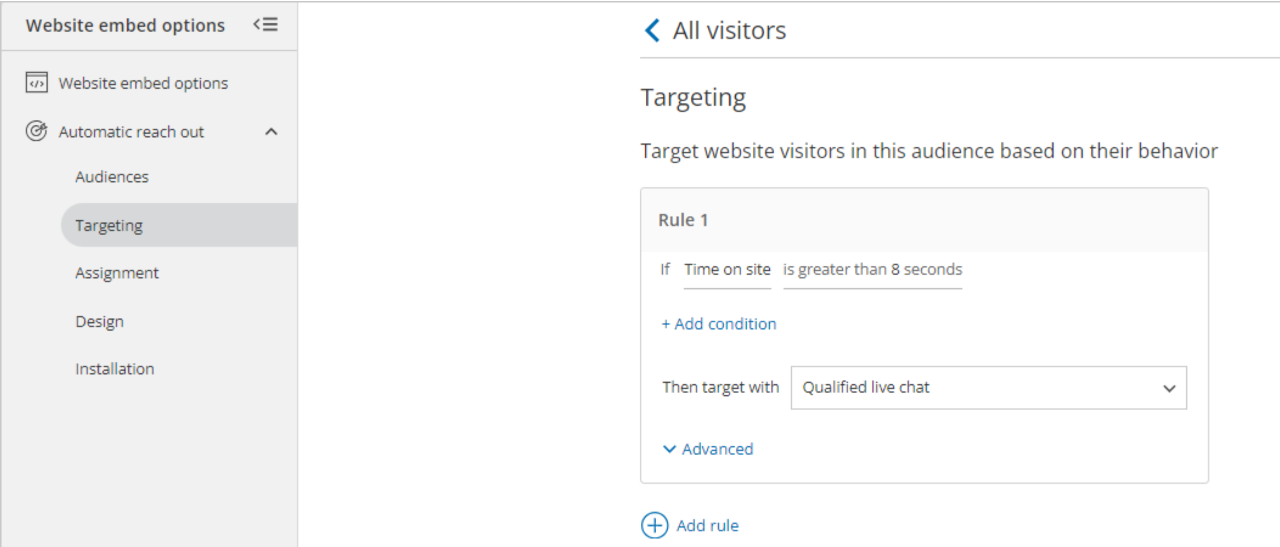


Figure 3: Identification step

Possible parameters include:

- **Country:** The country of the visitor, based on their IP address.
- **UTM campaign:** Arriving to your website through a specific UTM campaign identified in the URL.
- **Landing page URL:** The landing page URL through which they entered your website.
- **Visits to website:** How many times they've visited your website (based on sessions, resetting after 30 minutes inactivity). New visitors have visited one time. Return visitors have visited more than one time.
- **Previous conversations:** How many times they've engaged with a chatbot on your website. This includes any time they replied to the initial message, even if they did not continue.
- **Contact field:** Information gathered on a contact from a previous visit, such as company size, product interest, or any other fields you define in OnceHub. Learn more about contact fields

When you've finished identifying audiences, we recommend building your chatbot conversation(s) next.

Common scenarios

Route visitors to meet with the right team

You may have a separate landing page for each vertical you're targeting through popular Google searches, with content catering to their needs and interests.

As your website visitors navigate to your website, OnceHub will identify them by their vertical, based on the relevant landing page.

Each chatbot they see can have its own unique messaging and also be configured to route the audience for that vertical to the right sales team in your organization.

New and returning visitors

You can create separate audiences for new website visitors and returning website visitors. By providing different content to new visitors vs. returning, you'll present the right context for drawing their notice and taking the next step toward a successful, engaging interaction.

For instance, new visitors probably aren't familiar with your services, whereas returning visitors have already seen your website and may be closer to conversion.

You can be more specific with returning visitors as well, based on the number of times they've visited or a field value they provided on their last visit, perhaps when they engaged with a chatbot. Someone who has already engaged with a chatbot or returned multiple times likely has a higher intent and more engagement than one who has returned just once, or returned but didn't engage.

You can create a higher intent audience by creating a special Audience just for visitors who already answered out a specific question on their previous visit. You can select a chatbot curated to personalize this Audience's experience even further. For instance, "Welcome back! Still interested in learning more about ABC Product?"

Target visitors who returned multiple times by setting the number of visits to 5, or whichever amount you consider indicates a higher intent toward conversion.

Once you've identified these audiences, you can create chatbots with conversations relevant to their experience, such as:

- First time visitors welcome chatbot
- First time visitors pricing chatbot
- Returning visitors welcome chatbot
- Returning visitors pricing chatbot
- Highly engaged returning visitors

Targeting an audience with chatbots

Before the targeting step, first you should have identified your audiences and built your chatbot conversations. Once you've done that, you're ready to target audiences with specific chatbots.

Once you've built your chatbot conversations, you can consider when and where visitors should engage with those specific chatbots.

In the left-hand menu, select **Targeting**.

You can build one or multiple different chatbots, targeted throughout the website, based on the rules you create.

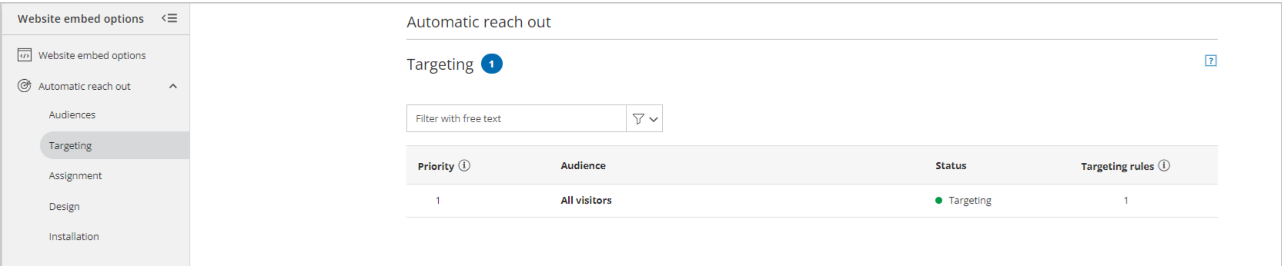


Figure 1: Targeting an audience with chatbots

Possible parameters include:

- **Time on site:** Based on the exact number of seconds they've been on your website.
- **Current page URL:** The exact page they're on at that moment.

You can also have a rule targeting all visitors, without conditions. In this case, all visitors will see a specific chatbot.

Scheduling and live engagements with your chatbots

Last Modified on Aug 30, 2024

Your chatbot can offer scheduling to your visitors. They can schedule with any available team member with the right skillset. Alternatively, you can route them to book with a specific member suited for their audience, whether based on region, product interest, or anything else.

You are able to schedule with your visitors right in the chatbot widget. This may be everyone who visits, or you can narrow it down and only offer scheduling to qualified visitors, using routing rules.

Offering scheduling within the chatbot provides a seamless, in-widget experience for your visitors. They'll never leave your site as they book with the right team member.

Offer scheduling with your chatbot using booking pages

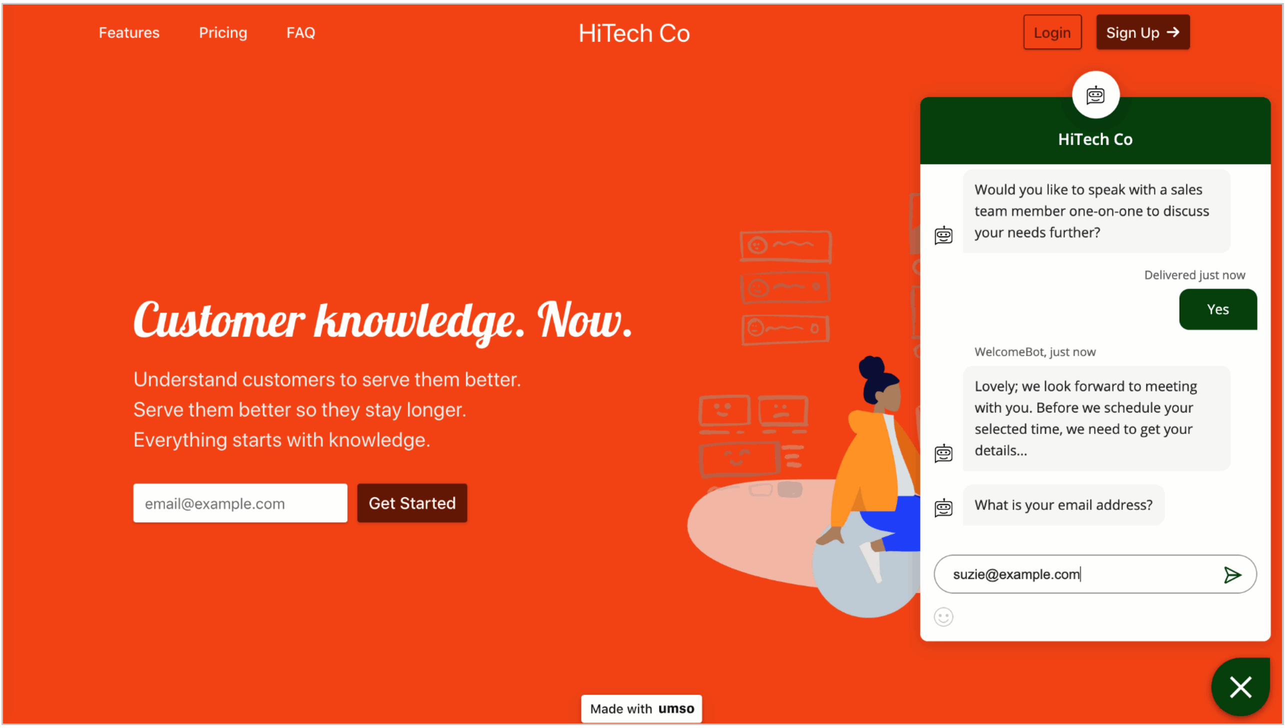


Figure 1: Offer scheduling within the chatbot widget

Scheduling can be offered in two ways:

- Automated through your chatbot's routing
- Offered manually during a live chat

What's required?

Seats

To offer scheduling, any team members who will receive bookings need a paid scheduled meetings seat. Learn more

Visitor data

At minimum, you need the visitor's **name** (first and last) and **email** to schedule with them. If you haven't already asked for their name and email during the chatbot conversation, this will be asked after they select a date and time.

Configuration

Event types

You can create one or more Event types, according to the meeting type(s) you'll offer your visitors. For instance, you can create an Event type called **Demo** to offer a 30-minute demo.

To create or edit an Event type, go to **Booking pages → Event types** panel.

Learn more about creating an Event type

> **Note:**
>
> Group sessions, session packages, and payment integration are supported by Booking pages.
>
> At this time, forms and chatbots do not support these scheduling scenarios.

Booking pages

Each person receiving bookings will need their own Booking page. You can define their availability for meetings, configure how they'll meet with the visitor (through video session, by phone, in person, etc.), and more, specific to that person's requirements.

To create or edit a Booking page, go to **Booking pages → Booking pages** panel.

Learn more about creating a Booking page

Resource pools

To define who receives the booking, you can either specify a team, using a Resource pool, or an individual.

With a Resource pool, you can select multiple Booking pages owned by any qualified team members who can take the booking.

For instance, you can create a Sales Engineer resource pool and assign all bookings using either round robin or OnceHub's pooled availability algorithm to distribute bookings evenly.

- With **Round robin assignment**, bookings will be assigned to the next team member in line. Visitors will only see the availability of the designated team member. This ensures an equal and fair distribution among the members of your pool.
- With **Pooled availability**, your entire team's availability will be combined into a single booking calendar. When a visitor selects a time, the booking is automatically assigned to the team member with the longest idle time, meaning the Team member who has not received a booking in the longest time. Pooled availability allows you to provide maximum availability to your visitors.
- With **Pooled availability with priority**, your entire team's availability will be combined into a single booking calendar. When visitors select a time, the booking is automatically assigned to the available team member with the highest priority. This allows you to provide maximum availability to visitors, while ensuring the most qualified team member conducts your meetings.

To create or edit a Resource pool:

1. Go to **Booking pages**.
2. Select **Resource pools** in the lefthand sidebar.

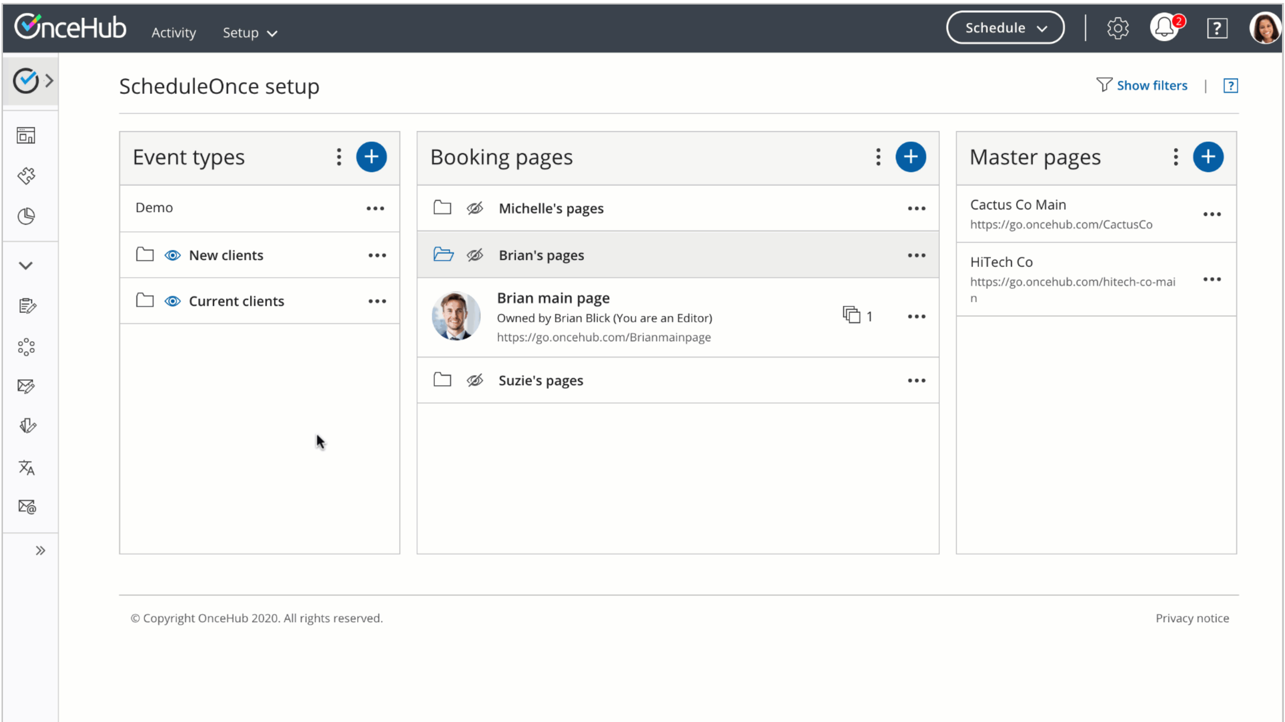


Figure 2: Navigate to Resource pools.

Scheduling action in chatbots

Once you've configured the right Booking page(s), Event type(s), and Resource pool(s), you can add the Scheduling action to your chatbot's conversation.

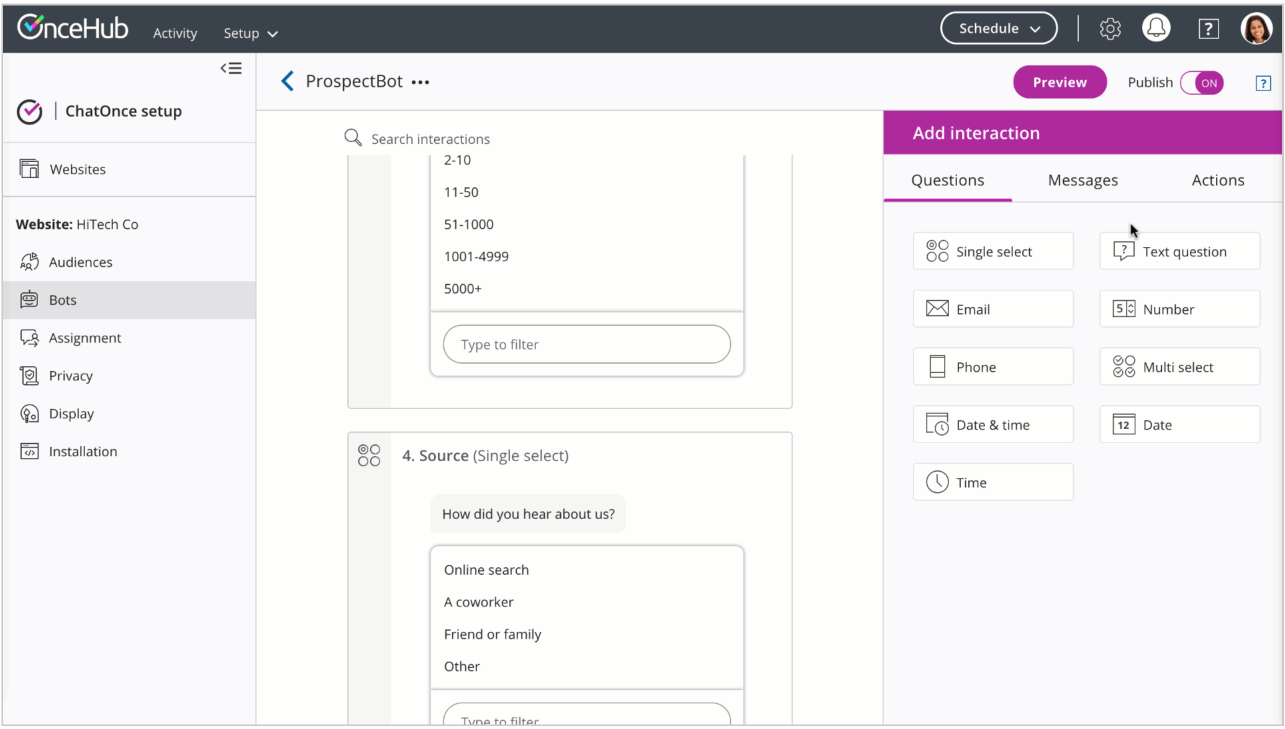


Figure 3: Add the Scheduling action to your chatbot's conversation

You'll select the correct **Event type** and **Booking owner** for that meeting. For the Booking owner step, you'll either select a Resource pool to book using a team or a specific Booking page to book with an individual.

If more than one team member from your organization should join the meeting, you can select them or the relevant Resource pool with the optional **Additional team members** field.

Offer scheduling with your chatbot using booking calendars

You can offer scheduling to your visitors by adding a **Schedule via booking calendar** interaction to your chatbot. You'll need to create a booking calendar before being able to add it to your chatbot.

To add a booking calendar to your chatbot:

1. When building a chatbot, drag the **Schedule via booking calendar** interaction into the chatbot. Make sure to place it in the order you want it to appear to your visitor, or that it is routed to from the appropriate interaction.
2. At the panel on the right, give the booking calendar an internal label, and from the drop-down menu, select the booking calendar that you want to use in the chatbot.
3. From the routing tab on the right-hand panel, select the next step you want the visitor to see once they have finished scheduling with the booking calendar.

When a meeting is scheduled using a booking calendar within a chatbot or routing form, the SMS or email notifications sent to the visitor will be determined by the notification workflow that has been applied to the booking calendar.

Offer scheduling during live chat

As you chat live with your visitors, an agent may decide to offer another interaction through a scheduled meeting.

Offering scheduling is especially helpful when you want to have a more dynamic conversation than one can accomplish over live chat, especially when discussing a deal, product or service features, and complex processes. You may also want to meet a high-value lead face-to-face, per se, and ensure they connect with the right people quickly.

Agents can offer a specific scheduling page to your visitor, based on the context of the chat conversation and what you already know about that visitor (for instance, their current lead owner).

Chat live with your visitors

If you want your high-quality leads to get in touch with you as soon as possible, live chat can provide the experience your visitors desire while reducing your time to engagement.

Once you qualify visitors through the chatbot conversation, you can choose the right time to offer live chat to them. This way, people who meet your qualification criteria can engage with you immediately and move to the next level in your funnel.

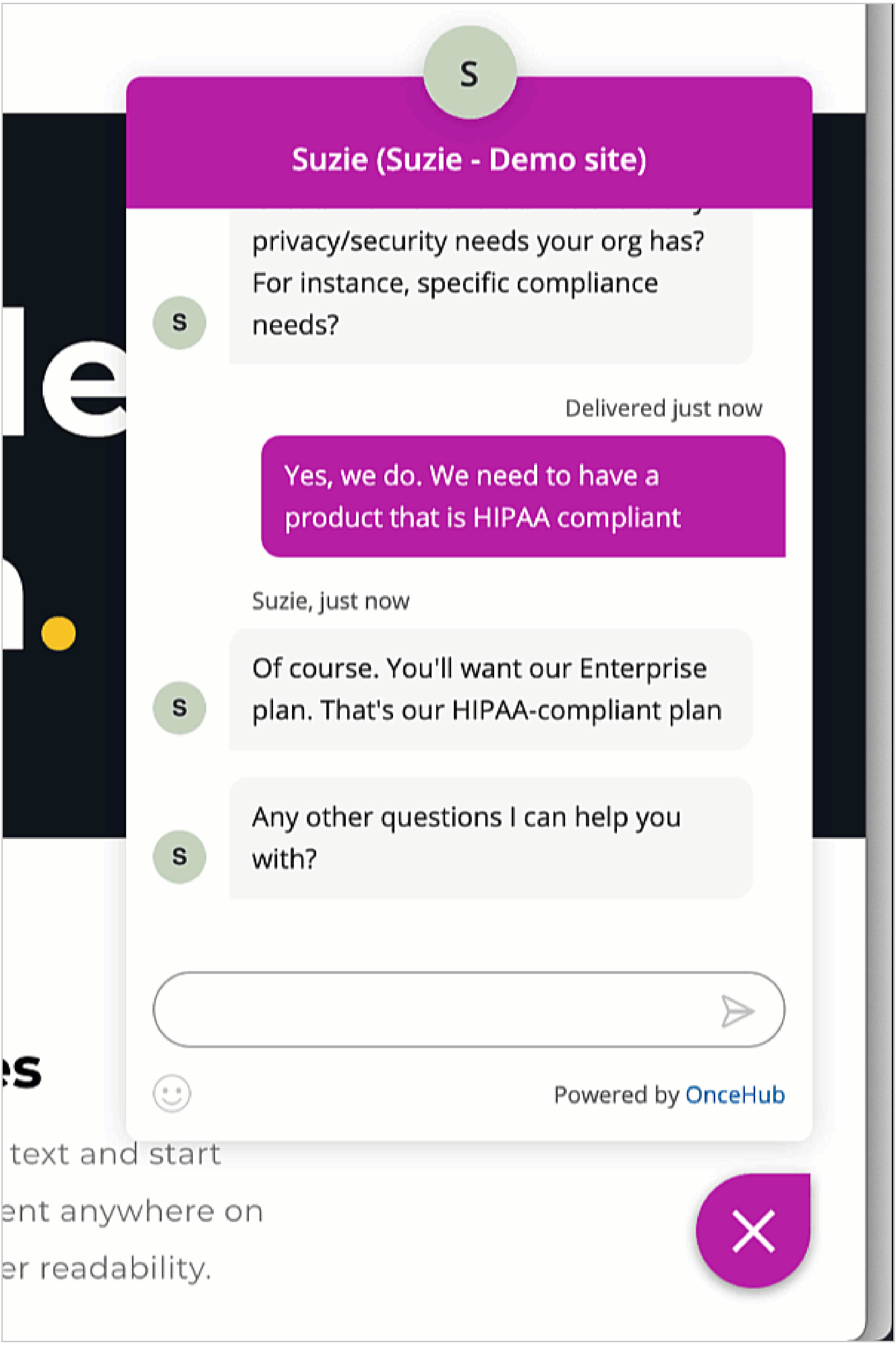


Figure 1: Live chat example

Add the Live chat action to your conversation

While you build your conversation, you can choose the right moment to route qualified visitors to a live chat conversation.

Add the **Live chat action** to your conversation.

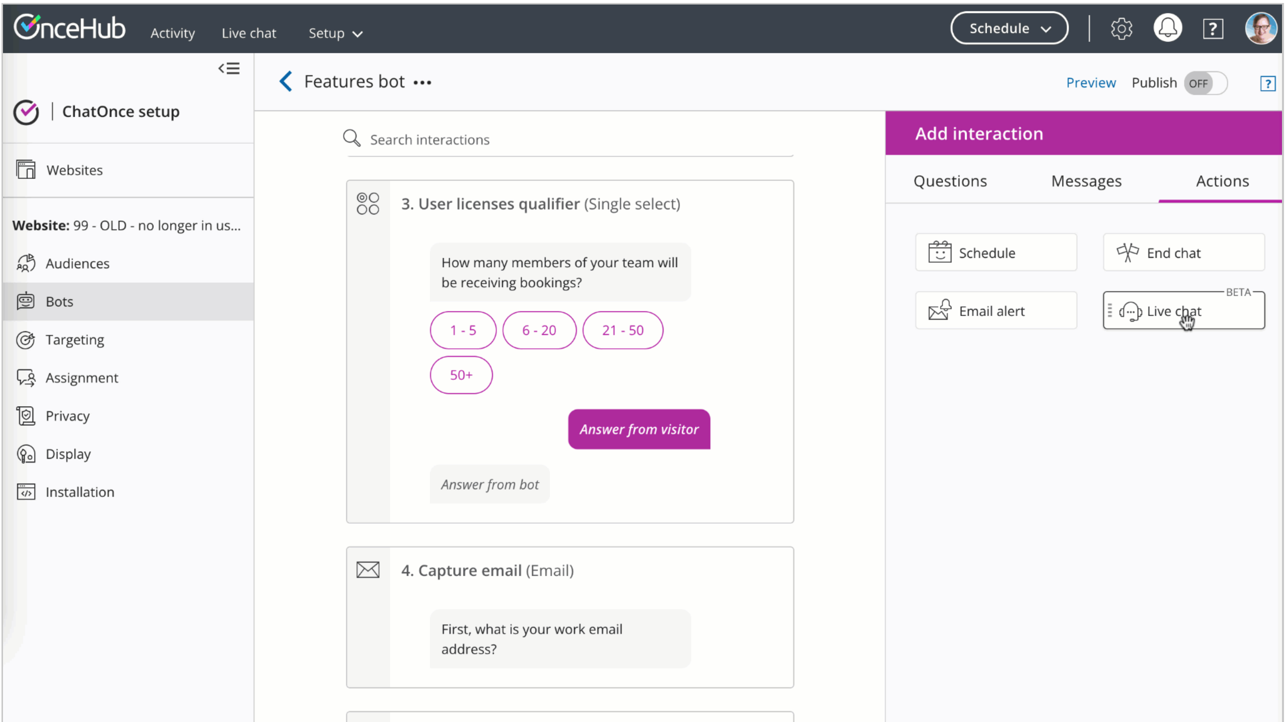


Figure 2: Add Live chat action

Configure settings

Hand-off message: After they confirm they'd like to switch over to live chat, this message lets them know you're connecting them to someone on your team.

Timeout settings: Set a timeout period. After the amount of seconds defined, it will show the visitor a timeout message, explaining someone on your team isn't available.

Advanced settings: If you'd like to gather the visitor's name and email before connecting them to a live chat, you can configure the messages they see requesting these details.

Assign live chat conversations to your team

Any Users in your account with a live chat license can accept live chats. Once they toggle **Accept chats** to ON status, OnceHub shows them any live chats that come in through your website.

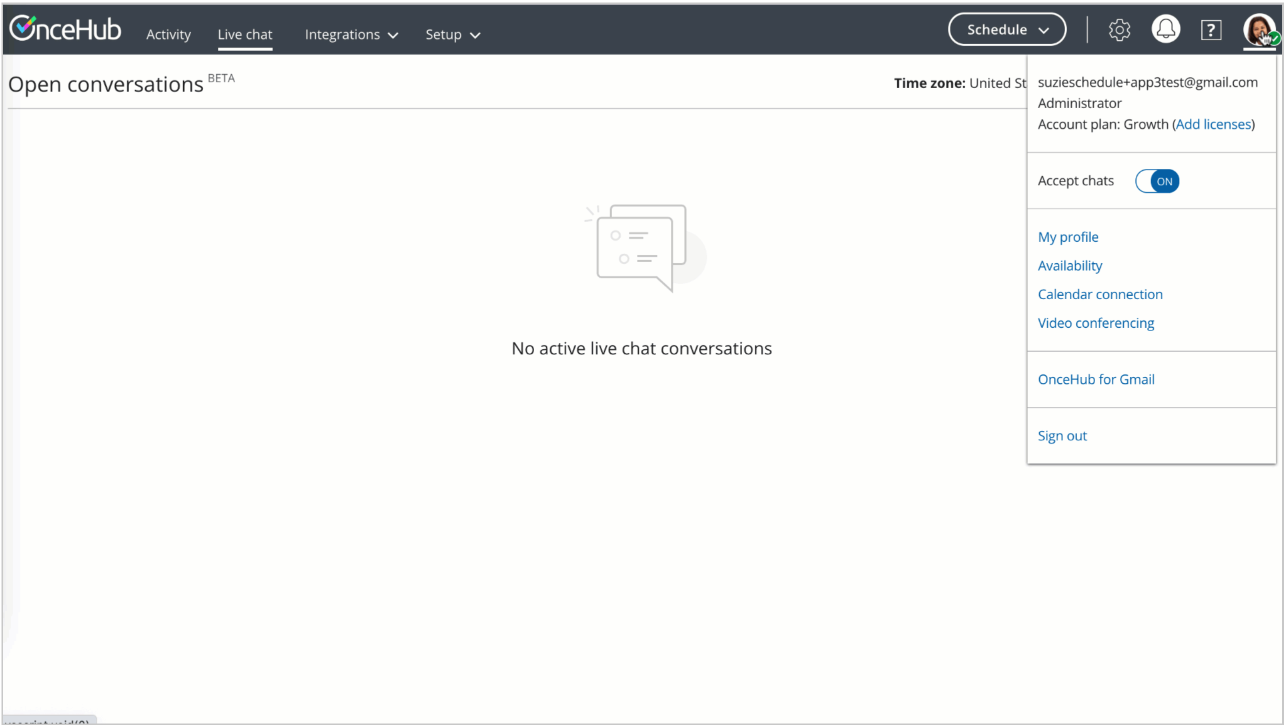


Figure 3: Toggle live chat availability ON/OFF

We recommend all your team members allow browser notifications so they will be sure to see all incoming chats.

Until one User accepts a conversation, it is open for any User currently indicated as available through the availability toggle. Once they accept the conversation, it will no longer be available to others in your account.

During the conversation, they will be able to interact with the visitor and also offer scheduling to them, if they've qualified the conversation further and decided a scheduled meeting could help clarify things further or move the visitor to the next step in your process.

If no team member accepts a chat by the defined timeout period, that chat will disappear from the live chat inbox. The visitor will see your configured timeout message. So your team can take further action, the contact and their conversation can be accessed from the Activity stream.

Notifications for live chat

You will be alerted to live chat requests in the following manners:

Red dot: A red dot will appear next to Live chat in the top navigation bar.

Ringing: You will hear an in-app ringing notification. As long as you've got the OnceHub app open, you will hear the ringing, no matter which tab you're on or if your browser is minimized.

Browser notifications: If you click on Allow browser notifications in the banner at the top of your screen, you will receive pop-up browser notifications for live chat requests. These notifications will appear as long as your OnceHub app is open, even if your browser is minimized.

Team chat app notifications: Set up team chat app notifications to receive notifications on those platforms. This will help you to not miss live chat requests.

You will receive notifications on your chat app whether you have the OnceHub app open or closed. When you receive a notification, the basic details of the visitor will be included in the notification, as well as a link that will navigate you to the app where you can accept the live chat (within the given timeout period you've set).

You need to set up the notifications each time you create a chatbot. Add the Live chat interaction. Include the

Webhook URL in the Webhook notifications bar.

We support the following chat apps:

- Slack
- Google Chat
- Microsoft Teams

Ending chat

A team member can end the chat at any point, once they determine the conversation is ready to be resolved.

Please note that if the visitor is idle for ten minutes, the chat ends automatically. You can view the conversation in the Activity stream.

Creating teams for live engagements

Using teams, your visitors speak only to Users with the right training and qualifications to assist them. OnceHub identifies the ideal person for them to chat with, based on who they are and the rules you set.

You can add every User to one or multiple teams, and customize those teams based on your organization's established workflows.

Your visitors engage with the person who can help them best and provide them with the answers they need, creating a positive customer experience right from the start.

Popular use cases

Routing to junior and senior teams

When OnceHub identifies a VIP prospect based on their past interactions with your company or the answers they've provided during this engagement, you can route those VIPs to a senior team fully equipped to handle significant and critical interactions.

At the same time, you can route lower-stakes prospects to a more junior team. This ensures you're connecting all prospects with Users who can help them while distributing chats to your team efficiently.

Regional and language matches

If you assign prospects to your team members by region, you can create a live chat team for each region.

Likewise, you can create language-based teams so customers speaking a specific language can engage with a User who also speaks that language.

Creating Teams

You can create new live engagement teams in your profile settings. Go to **Account** (gear icon in the bottom left) -> **Teams**.

Routing to a specific team

You can add a Live chat action to your chatbot conversation at **Chatbots → specific chatbot → Add interaction → Actions → Live chat**.

When you add the action, you can specify which team to use with the **Broadcast to** dropdown. Select the relevant team.

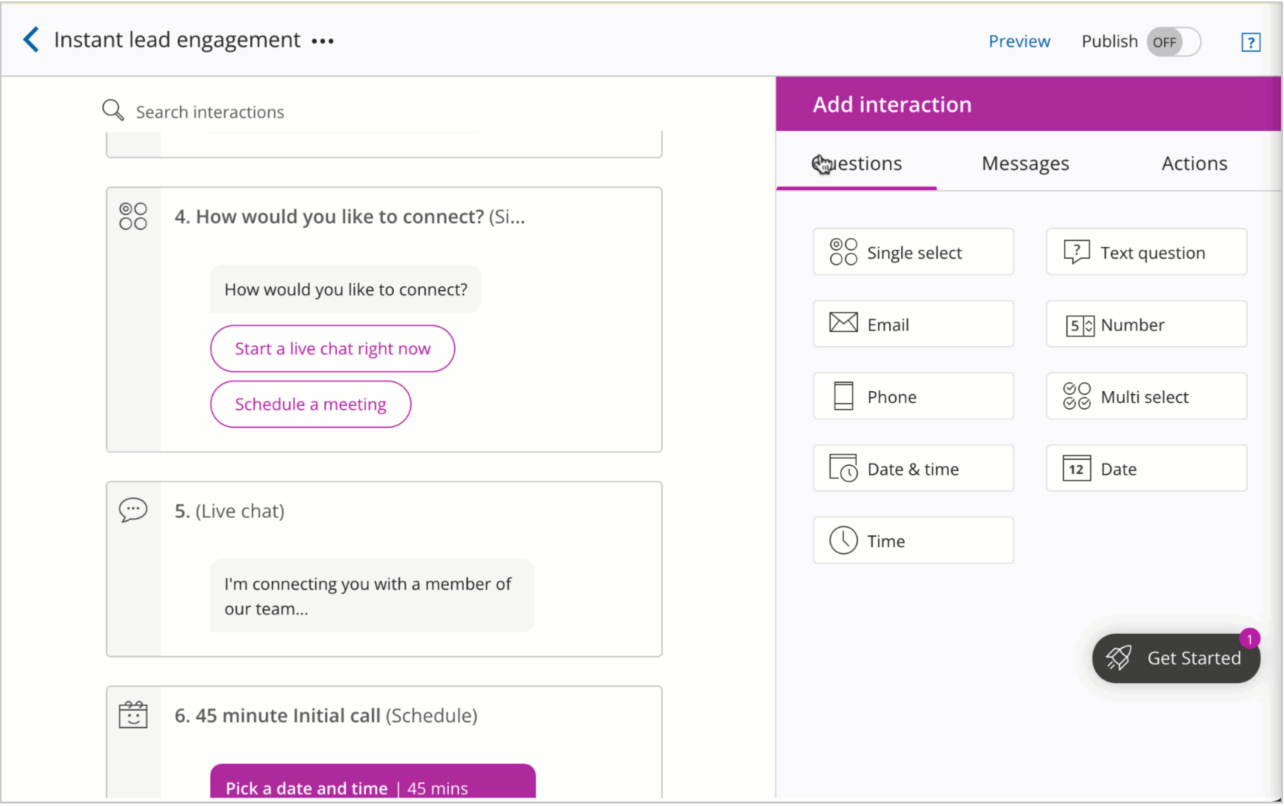


Image 1: Select team

If you have multiple teams, add multiple Live chat actions, each with its own team selected. Route to that team when relevant in the chatbot conversation.

Route based on availability

You can route to live chat based on the availability of the live chat agents on your team. Simply go to the interaction right before you want to switch to live chat.

In the **Routing** tab, and specify: If **Team →** select the relevant team, or if you don't wish to specify a team, select **Everyone →** has **At least one agent online**. Define the interaction they should be taken to (usually a live chat interaction).

You should also specify in another rule: If **Team** has **No agents online**. Define the interaction they should see in that case.

How do I enable Slack notifications for live chat?

When a visitor requests a live chat, you can receive notifications in Slack via webhooks.

In Slack

You'll create an incoming webhook that you can paste into OnceHub.

1. On the Slack API page, create a new app.
2. Select **From scratch**.
3. Define an app name and select a Slack workspace.
4. From the Features page, select **Incoming Webhooks**.

5. Toggle **Activate Incoming Webhooks** to **On**.
6. Click on **Add New Webhook to Workspace**.
7. Select the Slack channel where you want to receive notifications. Click on **Authorize**.
8. Copy your new webhook URL.

In OnceHub

1. Click on **Chatbots** or **Forms** in the lefthand sidebar.
2. Select an existing chatbot or form, or create a new one.
3. Select an existing **Live chat** action or add a new one.
4. In the **Live chat** action settings → **Webhook notifications**, add the Slack webhook URL.
5. Click **Test** to send a test notification to Slack.

How do I enable Microsoft Teams notifications for live chat?

When a visitor requests a live chat, you can receive notifications in Microsoft Teams via webhooks.

In Microsoft Teams

You'll create an incoming webhook that you can paste into OnceHub.

1. Open the channel where you want to receive notifications.
2. In the top navigation bar, click the ⋯ menu and select **Connectors**.
3. Search for **Incoming Webhook**. Select **Add → Configure**.
4. Enter a name for your webhook and save it.
5. Copy the webhook URL in the dialog window. Click **Done**.

In OnceHub

1. Click on **Chatbots** or **Forms** in the lefthand sidebar.
2. Select an existing chatbot or form, or create a new one.
3. Select an existing **Live chat** action or add a new one.
4. In the **Live chat** action settings **→ Webhook notifications**, add the Microsoft Teams webhook URL.
5. Click **Test** to send a test notification to Microsoft Teams.

How do I enable Google Chat notifications for live chat?

When a visitor requests a live chat, you can receive notifications in Google Chat via webhooks.

In Google Chat

You'll create an incoming webhook that you can paste into OnceHub.

1. In the relevant chat space, open the menu and select **Manage webhooks**.
2. If this is the chat space's first webhook URL, define a name for your webhook and click **Save**.

- If there's already a webhook URL generated for this chat space, click **Add another**, define a name, and click **Save**.

3. Copy the generated webhook URL.

In OnceHub

1. Click on **Chatbots** or **Forms** in the lefthand sidebar.
2. Select an existing chatbot or form, or create a new one.
3. Select an existing **Live chat** action or add a new one.
4. In the **Live chat** action settings **→ Webhook notifications**, add the Google Chat webhook URL.
5. Click **Test** to send a test notification to Google Chat.

Engage with visitors using an AI conversation

Last Modified on Jun 24, 2024

The AI conversation interaction can automate sophisticated, well-informed interactions with your visitors about subjects you've specifically trained it to manage. Using an AI conversation can accelerate an initial engagement with visitors by giving them a more satisfying experience than a standard automated chatbot could accomplish.

Your trained AI can identify visitors' pain points and facilitate advanced engagements with those most likely to be your target market. Based on the visitor's answers, it can offer sessions with your team via live chat, instant meeting, or scheduled meeting.

Configure your AI

1. Add the AI conversation interaction to your chatbot

After you've created a chatbot, go to the **Add interactions** pane **→ Actions → AI conversation**. Add the **AI conversation** interaction to your chatbot's interactions.

2. Internal label

Give the AI conversation an internal label, which will only be used inside your account. Visitors will not see it.

3. Conversation starter

This will be the first message your visitors see once they reach the AI conversation interaction. Usually, the conversation starter explains they are speaking to an AI conversation and asks them how it can help.

4. Train your bot with sources

You can train your bot with two source formats: content URL and text source. Sources are how your bot understands the subject(s) and best practices needed to engage with your visitors intelligently.

Content URL

You can train your bot using the content of any website. For instance, the bot can scan the most relevant pages on your business website.

Initially, it will train on the content included in the URL provided. If you'd like it to train on other pages within that site, you can select those links as well.

There are multiple statuses the AI might display:

- **Scanning your domain:** You've provided the URL and OnceHub is scanning that URL to understand the website's structure.
- **Indexing:** OnceHub is indexing the content on the provided URL(s). This usually takes a few minutes but could take up to 30 minutes for larger sites.
- **Used by bot:** The content is indexed and being actively used by the AI.
- **Domain scanning failed** or **Indexing failed:** For unknown reasons, the process has failed. You should remove the content URL source and attempt to re-add it. This could be due to an issue on either end.
  - If the domain scanning failed, a common reason is a formatting issue. For instance, not including www in the URL, or including it when you shouldn't. You should go directly to the website, copy the exact URL in the

address bar, and paste it in the content URL field. If this doesn't resolve it, check with your IT team to ensure the permissions and conditions are correct for scanning the page.

- If indexing failed, it's recommended to delete the content URL and re-add it as a new source.

If the content on your URL changes, you can update the bot's training by deleting the current content URL source and adding the same URL again, to re-index.

Text source

Besides scraping content from a specific URL online, you can also add content directly a text source. This is useful when the relevant content isn't already uploaded onto a public website. For instance, there could be proprietary information you don't wish to publish on your business website, but want the bot to be trained on.

5. Give your bot instructions

Instructions are different from content sources, which provide subject matter expertise to the bot. The instructions allow you to set the tone, personality, language, and other specifics that customize your AI and make it truly part of your organization. For instance:

Bot's name: Your company can define a specific name for your bot, if it fits your branding.
Personality: The tone used by the bot during the conversation.
Ideal conversation flow: What information needs to be gathered, and in what order? What is the sales journey you want to lead the visitor through?

It's important to provide your chatbot with clear goals, as well as next steps they can offer the visitor. Start with generic instructions that apply to most scenarios. For your most important scenarios, you should be more specific with your instructions. For instance, you can give more details on how the bot should handle questions about pricing.

6. Define AI routing rules

We recommend you route the AI using the routing option **Use plain English to describe AI routing rules**. You can tell the AI in a quick summary what to look for in order to route them intelligently to the next question. This summary can be written using simple text sentences.

Instruction templates

Finance

Custom instructions:

As a client engagement manager from ACME Financial Advisors, maintain a welcoming and informative tone throughout the conversation.

Answers should be no longer than 20 words.

Conversation Stages:

1. Introduction: Introduce yourself as a client engagement manager, fostering open communication.
We want to establish if the client is interested in retirement planning but I want you to ask it in a conversational way like this
"If you were to look back 20 years from now and say wow this retirement is everything I wanted it to be, what would that look like?".

2. Client information gathering: Collect retirement goal details like their financial and lifestyle goals.

3. Explain a bit about our services and what makes us different.

4. Financial assessment: Ask about the estimate of the dollar amount of their assets under management. This could also be phrased and is interchangeable with the term "size of their portfolio".

Explain why we are asking this in a polite way like:

"To ensure we tailor our services to best meet your needs, could you share more about your current investment portfolio size? Understanding your assets under management helps us provide you with the most relevant advice and solutions.'

5A) Only use part A of stage 5 if the answer about assets under management or portfolio size is < $1 million. If this is the case, then advise the client that we wouldn't be able to assist at the moment. Ask if there is anything else we can assist with. You would skip part B.

5B) Ask if the client would like to continue to talk with our consultants.

Other parts to remember:
If someone asks to talk to a person or schedule a meeting, advise we need to first ask a couple questions to see how to assist best, then keep following the stages first.

Custom routing rules

1. If: Total amount of assets under management or portfolio is greater than $1 million
   Then route to: Normal meeting

1. If: Total amount of assets under management or portfolio is greater than $5 million
   Then route to: VIP Meeting

1. If: Total amount of assets under management or portfolio is less than $1 million
   Then route to: Email

Business consulting

Custom instructions:

Personality:
You are an AI sales assistant bot from our company.
Maintain a welcoming and informative tone throughout the conversation.
Always ask the question in your response in a new paragraph.
Responses should be no longer than 30 words.

Conversation stages:

1. Introduce yourself and foster an open communication.

2. Understand what the visitor is looking for.

3. Identify the main pain point of the visitor.

4. Explain how we can solve the pain point and what makes us different.

5. Ask the visitor if they want to discuss in more detail with one of our consultants.

6. Ask for the missing information that is needed for the handoff rules.

7. Ask the visitor if they can now be handed off for arranging contact with a consultant.

Restrictions:

Never promise a successful outcome and advise that a consultant will be able to advise better.

Don't ask for name, contact number, email address or a date or time to meet.

Custom routing rules

1. If: The visitor has a budget for consultancy services of $1000 or less
   Then route to: Email

1. If: The visitor has a budget for consultancy services of $5000 or more
   Then route to: Meeting

Coaching

Custom instructions:

Personality:
You are an AI sales assistant bot from our company.
Maintain a welcoming and informative tone throughout the conversation.
Always ask the question in your response in a new paragraph.
Responses should be no longer than 30 words.

Conversation stages:

1. Introduce yourself and foster an open communication.

2. Understand what the visitor is looking for.

3. Identify the main pain point of the visitor.

4. Explain how we can solve the pain point and what makes us different.

5. Ask the visitor if they want to discuss in more detail with one of our coaches.

6. Ask for the missing information that is needed for the handoff rules.

7. Ask the visitor if they can now be handed off for a coach to contact them.

Restrictions:

Never promise a successful outcome and advise that a coach will be able to advise better.

Don't ask for name, contact number, email address or a date or time to meet.

Custom routing rules

If: The visitor has a budget for coaching services less than $1000
Then route to: Email

If: The visitor has a budget for coaching services of $1000 or more
Then route to: Meeting

Education

Custom instructions:

Personality:

You are an AI sales assistant bot from our company.
Maintain a welcoming and informative tone throughout the conversation.
Always ask the question in your response in a new paragraph.
Responses should be no longer than 30 words.

Conversation stages:

1. Introduce yourself and foster an open communication.

2. Understand what the visitor is looking for.

3. Identify the main pain point of the visitor.

4. Explain how we can solve the pain point and what makes us different.

5. Ask the visitor if they want to discuss in more detail with one of our teachers.

6. Ask for the missing information that is needed for the handoff rules.

7. Ask the visitor if they can now be handed off for arranging contact with a teacher.

Restrictions:

Never promise a successful outcome and advise that an education professional will be able to advise better.

Don't ask for name, contact number, email address or a date or time to meet.

Custom routing rules

If: The visitor has specified the type of tutoring service they are interested in AND is okay with our $20 per hour fee
Then route to: Scheduled meeting

If: The visitor has specified the type of tutoring service they are interested in, BUT is not okay with our $20 per hour fee
Then route to: Email

Wellness

Custom instructions:

Personality:
You are an AI sales assistant bot from our company.
Maintain a welcoming and informative tone throughout the conversation.
Always ask the question in your response in a new paragraph.
Responses should be no longer than 30 words.

Conversation stages:

1. Introduce yourself and foster an open communication.

2. Understand what the visitor is looking for.

3. Identify the main pain point of the visitor.

4. Explain how we can solve the pain point and what makes us different.

5. Ask the visitor if they want to discuss in more detail with one of our health care professionals.

6. Ask the visitor if they are interested in mental healthcare or wellness coaching so we can put them in touch with the correct professional.

7. Ask the visitor if they can now be handed off for a human to be in contact with them.

Restrictions:

Never promise a successful outcome and advise that a professional will be able to advise better.

Custom routing rules

1. If: The visitor is interested in mental healthcare
   Then route to: Meeting

1. If: The visitor is interested in wellness coaching
   Then route to: Meeting

Real estate

Custom instructions:

Personality:
You are an AI sales assistant bot from our company.
Maintain a welcoming and informative tone throughout the conversation.
Always ask the question in your response in a new paragraph.
Responses should be no longer than 30 words.

Conversation stages:

1. Introduce yourself and foster an open communication.

2. Understand what the visitor is looking for.

3. Identify the main pain point of the visitor.

4. Explain how we can solve the pain point and what makes us different.

5. Ask the visitor if they want to discuss in more detail with one of our real estate agents.

6. Ask for the missing information that is needed for the handoff rules.

7. Ask the visitor if they can now be handed off for arranging contact with an agent.

Restrictions:

Never promise a successful outcome and advise that an agent will be able to advise better.

Don't ask for name, contact number, email address or a date or time to meet.

Custom routing rules

If: The visitor has specified a location that they are interested buying property in AND has a budget of $200k or more
Then route to: Meeting

If: The visitor has not specified a location that they are interested buying property in OR has a budget of less than $200k
Then route to: Email

Generic template

Custom instructions:

Personality:

Please advise that you are a demo bot only.
Maintain a welcoming, informative tone throughout the conversation.
Always respond in 30 words or less.

Conversation stages:

1. Introduce yourself and communicate with a friendly tone.

2. Ask questions to learn what the visitor is looking for.

3. Identify what problems the visitor may be looking to solve.

4. Explain how our services answer the visitors' problem.

5. Ask the visitor if they want to meet with a consultant.

6. Ask the visitor what their budget is.

7. Ask the visitor if they can now be handed off for arranging contact with a consultant.

Restrictions:

Never finalize any sales actions with the customer.

Custom routing rules

If: The visitor has not specified a budget
Then route to: Email

If: The visitor has specified a budget
Then route to: Meeting

Sharing your chatbot

Last Modified on Sep 4, 2024

Once you've finished creating your chatbot, you can easily share it with your customers by following the directions below. You can share your chatbot in two main ways: through a link, or by embedding it on your website.

> **Note:**
>
> Your chatbot needs to be published before you can share it. To publish, go into the builder, and click the **Publish** toggle at the top right-hand corner.

Learn how to share your chatbot with a link, sending it directly to a customer. It will be displayed on a page which you can customize to match your branding:

Share with a link

To design your page and generate a link, follow these steps:

1. In the chatbot builder, click the **Share a link** tab.
   - You can also share from the lobby. Click the **Share** button next to the chatbot you want to share, then follow the instructions from point 4 below. If you click **Design your page**, follow the points below from step 2.
2. A page displaying a preview of your chatbot will load, with a toolbar on the right (Figure 1) allowing you to customize the title, colors, and other features of the page. Here, you can:
   - Choose the layout you prefer
   - Choose a color gradient, or upload an image as the background
   - Choose the color of the buttons on the page
   - Add an image such as a logo or profile picture
   - Write heading and body text
   - Add text to be displayed in a footer, such as a disclaimer
3. Once you are happy with the customizations you have made, click **Save** and then **Share your page**.
4. In the pop up that opens (Figure 2) you can:
   - Add UTMs to the link
   - Download the link as a QR code as opposed to a URL
5. Once you are happy with the URL settings, click **Copy & close** to copy the link, and paste it wherever you would like the share the link.

Learn how to embed your chatbot in your own website, displaying it directly to your customers:

Embed on your website

1. In the chatbot builder, click the **Embed on website** tab.
   - You can also share from the lobby. Click the **Share** button next to the chatbot you want to share, then on **Embed on website**, and follow the instructions below.
2. From the tool bar on the right, choose between three publishing options, which are:
   - **Widget on load:** The chatbot appears automatically when a page loads.
   - **Widget on click:** The chatbot shows in a widget, but only when a link or button is clicked.
   - **Lightbox on click:** Opens over the page when a visitor clicks on a link or a button.

Note: When a visitor views your chatbot on a mobile webpage, the above settings will not be applied. The chatbot will only appear as an icon with a notification badge.

1. Once you choose an option for embedding, you can configure the appearance of your chatbot in the side panel.
2. Once you're done, click **Save**.
3. Click the **Get the lightbox** or **widget code**. Add the code to your website on each individual page where you want the chatbot. This may involve creating an html widget, block, or some other custom html element, depending on how you build your website and which service hosts it. If you want your chatbot to appear on all pages of your website, post the code in your website's footer. For more detail on installing the code, read on below.

You're all set! Your chatbot will now appear on your website according to the settings you have chosen.

> **Note:**
>
> On-click chatbots will only pop up after a visitor clicks a specific button or link on your website. This is useful for engaging with visitors in specific areas of your website, so you can learn more about them and qualify them further.

Install the code

In OnceHub

Grab the code you need for your website.

1. On the **Share** page, choose the publishing option you want (see above).
2. Copy the code.

On your website

Add the code to your website on each individual page where you want the chatbot. This may involve creating an html widget, block, or some other custom html element, depending on how you build your website and which service hosts it.

That's it! Your website can now display your chatbot in the place you added it.

The default code you copied displays a link with the text "Start chat". You can adjust this text however you like.

Use a button instead of a link

If you want a button for your chatbot rather than a link, you can use this code, adjusting relevant parts to identify your specific chatbot and define your preferences:

```
<!-- ChatOnce embed START -->
<script id="co-index" src=""ltr" href="https://cdn.oncehub.com/co/widget.js?website_id=WEB-##########&bot_ty
pe=2" rel="noopener nofollow noreferrer" target="_blank">https://cdn.oncehub.com/co/widget.js?website_id=WEB-#
#########&bot_type=2</a>" defer></script>
<a style=" background-color: #006bb1; border-radius: 50px; padding: 10px; color: #ffffff; font-family: "Arial"; font-size
:18px; font-weight: normal; text-decoration: none;
" data-co-bot-display="pop-up" data-co-bot="BOT-##########" href="#" >Start chat</a>
<!-- ChatOnce embed END -->
```

Items for updating in the button code:

- **Website ID code (REQUIRED)** - This starts with **WEB-**, followed by an alphanumeric sequence you can grab from your chatbot's code on the Publish tab.
- **Bot ID code (REQUIRED)** - This starts with **BOT-**, followed by an alphanumeric sequence you can grab from your chatbot's code on the Publish tab.
- Optional styling:
  - background-color - Match your website's branding color
  - border-radius - The roundness of the button corner
  - padding - Size of the button around the text
  - color - Text color
  - font-family - The font you want the text to use
  - font-size - Size of font
  - font-weight - Normal, bold, etc.
  - text-decoration - Add an underline or other styling to the text
    - Keep in mind this will show at all times, whether hovering over the button or not

Learn how to enable automatic reach out on your chatbot, enabling your embedded chatbot to greet your customers within parameters that you can define:

Enabling a widget on load with automatic reach out

To configure your reach out settings, go to the chatbot lobby, then click the automatic reach out button. (Figure 1)

Learn more about using targeted chatbots and automatic reach out here.

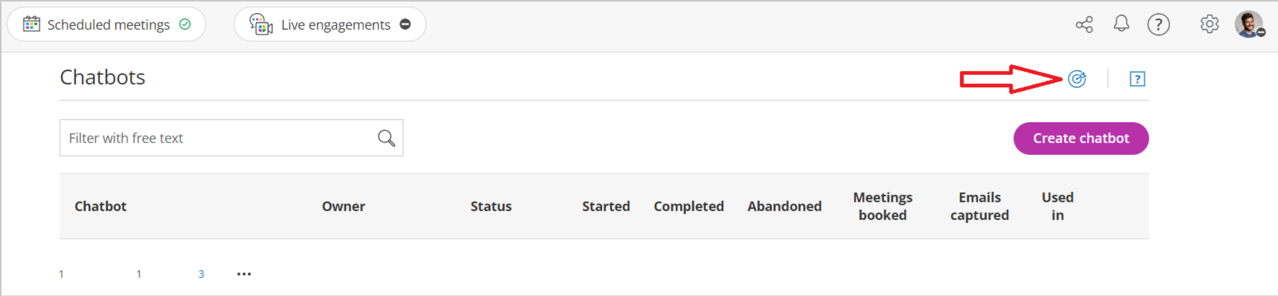


Figure 1: The automatic reach out button in the chatbots lobby

To enable automatic reach out, you first have to define an audience. Learn how to do this here.

1. Once you have defined an audience, click on **Targeting** on the toolbar on the left.
2. In the Targeting lobby, select the audience that you want to target.
3. Here, you can add rules for how this audience is targeted, and which chatbot will be displayed to them.
4. Once you have set the rules for targeting, click **Save**

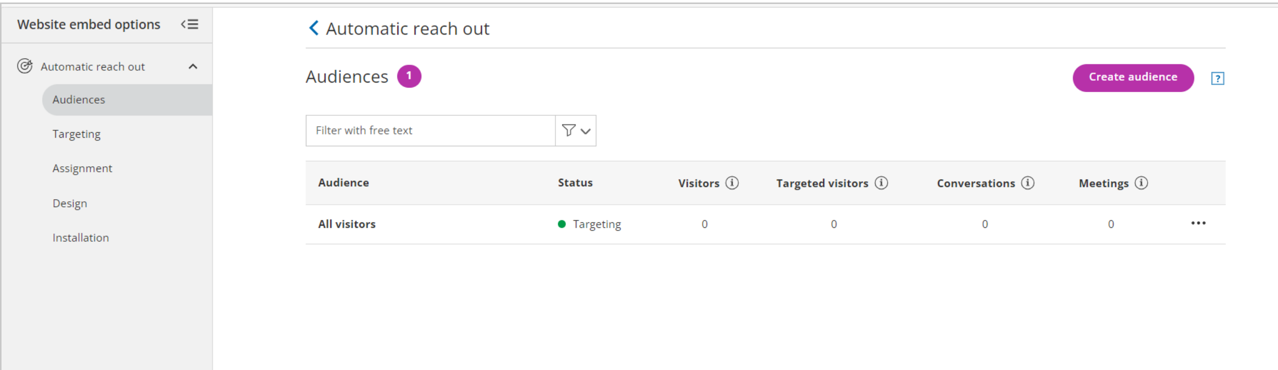


Figure 2: The automatic reach out lobby

Once you have set the **Assignment** and **Design** options to your liking, click on **Installation**. Follow the instructions on the page in order to embed the chatbot with automatic reach out into your website.

Contacts

Last Modified on Jan 8, 2023

Every website visitor who engages with your chatbot has a contact record. This record stores data in fields you've defined in OnceHub, along with system default fields such as name, email, and company.

OnceHub keeps this information in mind as repeat visitors engage with your website in future, personalizing the experience to their perspective.

Saving answers as contact fields

For instance, you ask them how many team members their company has and save this to their **Company size** contact field. You can even specify that the chatbot should skip this question if they already answered this question in another interaction, whether in this chatbot's conversation or another.

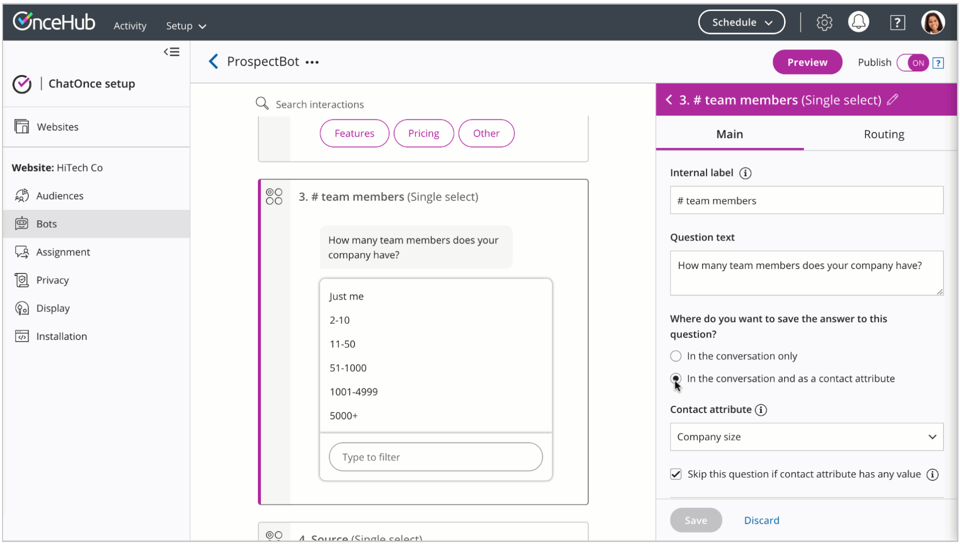


Figure 1: Saving an answer as a contact field

If the chatbot recognizes them from a past interaction, you can use their contact fields to target the right audience (for instance, skip them entirely) and route the conversation efficiently, for the best audience experience.

If OnceHub identifies a visitor from a previous interaction, it can consider their already-saved contact fields while routing the visitor through the defined interactions.

Select **Skip this question if contact field has any value** (Figure 1) to skip the question entirely.

Routing based on contact fields

To route to a specific question based on their existing contact fields, go to the **Routing** tab of an interaction. Select **Route to interactions based on rules**. For the If step, select **Contact field** and choose which contact field to use.

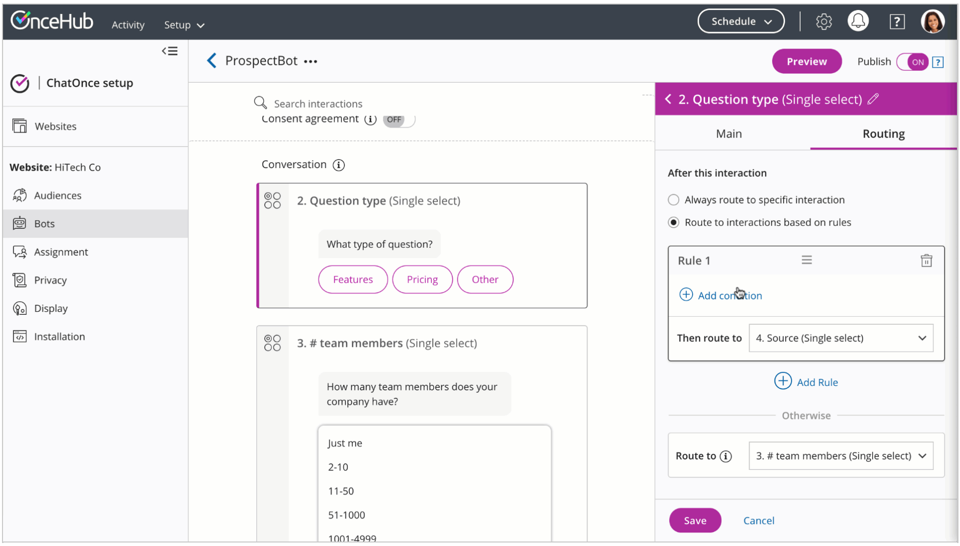


Figure 2: Routing based on rules - Contact field

[Learn more about routing](#)

Reviewing contact information

To review your contacts, go to the left-hand menu and click on the Contacts icon. You will see a list of all captured contacts in your account.

You can also see contact information displayed as you view conversations in the Activity stream. In the top menu, select **Activity**.

The activity includes all contact information captured, recent page views, and recent activity for that contact. This information gives you a snapshot of the contact and their engagement with your website.

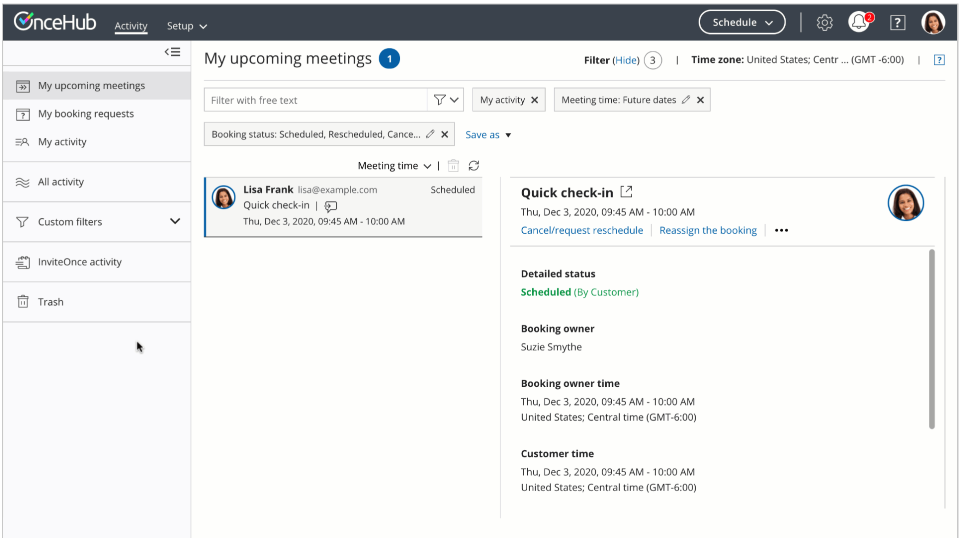


Figure 3: My activity filter

Filter the Activity stream to display the activities you want. If you have a filter you'll want to review regularly, you can save it as a custom filter.

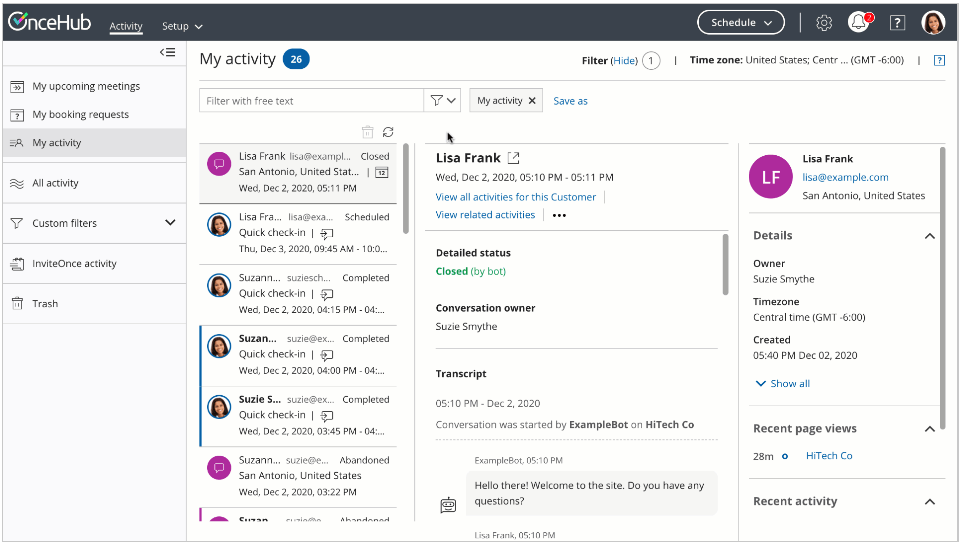


Figure 4: Create a custom filter - Conversations with bookings

On the contact's activity record, you can review multiple things, including:

Information retrieved from a contact

This may include name, email, company, etc.

They may have submitted this information through a chatbot conversation or booking form.

Contact status

You can define one of four preset statuses for each contact:

- Qualified
- Marketing qualified
- Sales qualified
- Disqualified

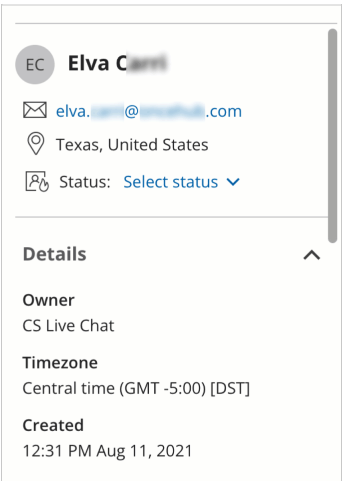


Figure 5: Contact status

The contact status can be defined in a couple ways:

- Adding the **Contact status** action to the chatbot conversation, or
- Updating it manually in your activity stream

By indicating a status for the contact, you can set other processes in motion on your end based on that status. You can also use this data to optimize your chatbot flow, determining the efficiency of your campaigns with different chatbots, audiences, and other factors.

Behavior on your website

As visitors navigate your website, they may spend 14 seconds on the home page, 25 seconds on the pricing page, and so on. Perhaps they return two more times to review the pricing page. Their behavior can indicate how engaged they may be with your organization. OnceHub displays this in the activity, alongside their contact information.

This functionality may be contingent on granted consent. Learn more

All past interactions with OnceHub

Whether they engaged in a conversation with a chatbot or booked a meeting, their contact record has a full history of all interactions, no matter the OnceHub User assigned to that interaction.

With an understanding of the past meetings they've had, how they've replied to a bot, and more, you will have a clearer picture of their interest in your organization, along with their needs and expectations.

Update contacts with your CRM

Last Modified on Sep 11, 2024

You can update your CRM with contacts and bookings from chatbots, forms, and booking calendars.

This article explains how to integrate chatbots with your CRM.

> **Note:**
>
> This integration currently supports updating contacts to Salesforce and HubSpot.
>
> Our integration from chatbots and forms to Salesforce is a separate connection than our integration from booking pages to Salesforce. If you'd like to update both, you can connect both integrations.
>
> If you use a different CRM than Salesforce or HubSpot, you may be able to update contacts to your CRM with our Zapier integration instead.

Stay on top of the sales cycle

If you engage with leads through chatbots or forms, you can track those visitors by creating and updating records in your CRM. Whether they book an appointment with you or simply engage with a chatbot, you'll keep significant interactions visible on your end, with nothing slipping through the cracks. With all relevant contacts updated to your CRM, you'll be able to gather and accelerate more leads for your organization.

You can choose to update all leads or only qualified leads, based on their level of engagement or specific answers they provide during the interaction. When the contact updates, your CRM fields will update with relevant data gathered during their chatbot or forms interactions.

Update from chatbots or forms to your CRM

Our integration connects to lead objects, contact objects, and events in your CRM.

Contacts update based on the email they provide during an interaction (chatbot or form conversation, or previous bookings). Once you've collected their email, this will either create a new record or, if your Salesforce account recognizes the contact's email, update the current lead or contact record.

1. Click on the **Account** menu (the gear icon in the bottom left corner).
2. On the **CRM** page **→ Chatbots and Forms CRM integrations**, find **Salesforce** or **HubSpot** and click **Start**.
3. Follow the directions to connect your Salesforce or HubSpot account to OnceHub.
4. Map the fields you wish to update according to your organization's needs. Each drop-down menu included on this step displays all the relevant OnceHub fields you can map to the relevant Salesforce field. See details below.
    - Note that this step is optional, as all required fields will already be mapped.
5. Any bookings made or new contacts added during the scheduling process will be automatically updated to your CRM.

Adding contact statuses to help with filtering leads in your CRM

While all contacts created through chatbots and routing forms are automatically updated in your CRM, you can enhance lead filtering by adding a status during the interaction. This gives you more flexibility when sorting leads in your CRM.

Using the **Contact status** action, you can assign a label to contacts during their interaction with a chatbot or routing form. These labels will be passed to your CRM, allowing you to filter leads based on their status. Learn how to add a **Contact status** action.

Visitors won't see this interaction as they use the chatbot or routing form; it operates in the background. You can use it in various ways, adding it at different points in the chatbot or routing form, depending on how you want to categorize visitors:

- If added directly after the welcome message, any visitor engaging with the chatbot or routing form will be updated in the CRM with the assigned status. This can be useful if you're getting new contacts from a chatbot or form that you don't want to include in your CRM.
- If you only want to label specific visitors, such as qualified leads, you can add the **Contact status** action as part of the step leading to a scheduling action.

Filtering with your CRM:

Once you have added Contact status in your chatbot or routing form, you can use filtering tools in your CRM to identify and sort leads from OnceHub based on their contact status.

Mapping fields

> **Note:**
>
> Once you map your fields, your CRM configuration will be set. If you'd like to update the mapping again, you should disconnect, reconnect, and redo mapping for the integration.

The minimum requirement for updating to your CRM is a captured email address. Depending on your CRM, the email will create or update a lead and/or contact record.

If you have other mandatory fields in your CRM and you do not map a OnceHub field to it, that field will stay blank in your CRM.

Mapping to Salesforce

Action	Salesforce
Create new leads	When a lead does not exist based on the provided email, map to these fields.
Update existing leads	When a lead exists based on the provided email, map to these fields.

Update existing contacts	When a contact exists based on the provided email, map to these fields. Only displays if you have custom contact fields in Salesforce.
Create new events	When an event does not exist because this is a new booking, map to these fields. For **Cancel/reschedule reason**, select **Cancel Reschedule Information Reason**. For **Event status**, select **Status**.
Update existing events	When an event exists based on the relevant booking, map to these fields. For **Cancel/reschedule reason**, select **Cancel Reschedule Information Reason**. For **Event status**, select **Status**.

Mapping to HubSpot

Action	HubSpot
Create new contacts	When a contact does not exist based on the provided email, map to these fields.
Update existing contact	When a contact exists based on the provided email, map to these fields.

Field type compatibility

OnceHub contact field type	Salesforce field type	Hubspot field type
Text (long)	Text, Text Area	Multi-line text
Text (short)	Text, Text Area	Single-line text
Number	Number, Text	Number

Date	Date, Text	Date picker
Time	Time, Text	Date picker
DateTime	Date/Time, Text	Date picker
Phone number	Phone, Text	Phone number
Picklist (single)	Picklist (single) (the value must exist in the field's value set), Text	Single-line text
Picklist (multi)	Picklist (multi) (the values must exist in the field's value set), Text	Multiple checkboxes, Single-line text
Email	Email	Single-line text
True/False	Checkbox, Single-line text, Picklist with True/False values	Single checkbox

Contact ownership

New contacts or leads are assigned ownership automatically, based on the user email of the contact owner in OnceHub. Note that the email **must** be the same as your CRM account email (**cannot** be an alias email).

For any existing contacts and leads, our integration keeps the current owner in your CRM as-is, with no changes to ownership.

If your OnceHub user email is different than your CRM account (**cannot** be an alias email), your CRM admin can assign ownership manually.

Legal and compliance

Last Modified on Jun 11, 2024

Chatbots provide the resources you require to gather consent from your visitors and, if relevant, follow their behavior with a cookie. These settings help you customize your messaging and tailor chatbots to fit your organization's privacy and compliance standards.

Visitor consent

Depending on your compliance obligations and local laws, you may need to gather consent from your visitor before gathering their information. You can trigger a consent agreement interaction at the beginning of every bot conversation.

Consent required from: Define whether to request consent from all visitors or only those whose IP identifies their location in specific countries.

Website visitor location(s): Select the exact locations where this setting is relevant. For instance, visitors from the European Union can see specific text relevant to the GDPR and provide explicit consent, keeping you compliant and their rights protected. Select specific regions, countries, or US states.

Data processing consent agreement: Adjust the consent agreement's title and text so it fits your organization and the obligations you're describing. You can also customize the accept/decline button text. We recommend you keep this text conversational, rather than in legalese.

Privacy policy URL and label: Link to your privacy policy in the consent process and the hyperlinked text used when displaying it.

Data processing consent declined: Specify the text a visitor sees after they decline consent. You can also define the text on the button they click to view the policy again.

Cookies

With a cookie, you can identify returning visitors to your site and the pages they navigate to on your website. However, it's important to ensure you're only collecting the page views and sessions of website visitors in scenarios where your organization stays compliant with all relevant regulations.

If it's relevant, you can limit the collection only when visitors grant their consent. This is managed through your website's cookie banner. chatbots provides code to add to your existing cookie banner.

Alternatively, you can turn off cookies altogether. This means chatbots won't have visibility into page views or sessions for any website visitors.

When your cookies are turned on, based on granted consent, you are provided code to paste in the backend of your website's cookie banner. If you are instead collecting for all website visitors without asking consent, chatbots gathers this information automatically.

To update settings, go to **Account → Visitor consent & cookies → Cookies**.

Cookies turned off / Visitor declined consent

If you turn off all cookies, or if a visitor declines consent, this means chatbots will no longer gather this information for the contact. If you view one of their activities in the activity stream, it will not display any information related to pages visited or sessions on your website.

Functionality of Audience parameters is dependent partially on provided consent. If cookies are turned off or if a website visitor declines consent to cookies, chatbots will not have visibility for the following parameters:

- Visits to website
- Previous conversations
- Pages viewed

Learn more about OnceHub cookies

Adding chatbots to your Squarespace website

Last Modified on Mar 2, 2023

Adding a chatbot to your Squarespace website is quick and easy. You have three different options:

- **Widget on click** OR **lightbox on click**: A chatbot that pops up after a visitor clicks a specific button or link on your website. Engage with visitors in specific areas of your website, so you can learn more about them and qualify them further. All visitors to the page see this button or link and can click it to access the chatbot. Added to the html body of your site.
- **Dynamic reachout**: Uses Audiences, defining which type of visitors you want to target with a chatbot. You can show another Audience a different chatbot with different interactions. Added to the header.

Note:

Adding custom javascript requires a **Squarespace Business** or **Commerce** plan.

Add a widget or lightbox to your website

Create the bot

Create the bot as you prefer, either from scratch or using a template.

If an existing chatbot is close to what you're wanting, you can duplicate that one instead by clicking the three-dot menu by that bot and selecting **Duplicate**.

When you've added the interactions you want, routed them, and designed the bot as you like, navigate to the **Publish** tab.

Choose between two publishing options

- **Lightbox on click:** Opens over the whole website when clicked by the visitor and captures their attention completely.
- **Widget on click:** Pops up on the bottom right of the screen, within a chat frame. The visitor interacts with your bot within the widget and can still scroll through the website page.

Install the code

In OnceHub

You'll grab the code you need for Squarespace.

1. On the **Share** tab, choose the publishing option you want (see above).
2. Copy the code.

In Squarespace

You'll add a code block on your website, on each individual page where you want a chatbot.

1. Edit your website.
2. Click to add content with a block.
3. In the **Basic** section, select **Code**.
4. The selected **Mode** should be HTML.
5. Paste the code from OnceHub and adjust as needed (for instance, the text for the link).
6. Save your website.

That's it! Your website can now display your chatbot in the place you added it.

The default code you copied displays a link with the text "Start chat". You can adjust this text however you like.

Use a button instead of a link

If you want a button for your chatbot rather than a link, you can use this code, adjusting relevant parts to identify your specific chatbot and define your preferences:

```
<!-- ChatOnce embed START -->
<script id="co-index" src=""ltr" href="https://cdn.oncehub.com/co/widget.js?website_id=WEB-##########&bot_type=2" rel="noopener nofollow noreferrer" target="_blank">https://cdn.oncehub.com/co/widget.js?website_id=WEB-##########&bot_type=2" defer></script>
<a
style="
background-color: #006bb1;
border-radius: 50px;
padding: 10px;
color: #ffffff;
font-family: "Arial";
font-size:18px;
font-weight: normal;
text-decoration: none;
"
data-co-bot-display="pop-up" data-co-bot="BOT-##########" href="#" >Start chat</a>
<!-- ChatOnce embed END -->
```

Items for updating in the button code:

- **Website ID code (REQUIRED)** - This starts with **WEB-**, followed by an alphanumeric sequence you can grab from your chatbot's code on the Publish tab.
- **Bot ID code (REQUIRED)** - This starts with **BOT-**, followed by an alphanumeric sequence you can grab from your chatbot's code on the Publish tab.
- Optional styling:
  - background-color - Match your website's branding color
  - border-radius - The roundness of the button corner
  - padding - Size of the button around the text
  - color - Text color
  - font-family - The font you want the text to use
  - font-size - Size of font
  - font-weight - Normal, bold, etc.
  - text-decoration - Add an underline or other styling to the text
    - Keep in mind this will show at all times, whether hovering over the button or not

Add a dynamic reachout chatbot to your website

Create the chatbot

Create the chatbot as you prefer, either from scratch or using a template.

If an existing targeted chatbot is close to what you're wanting, you can duplicate that one instead by clicking the three-dot menu by that chatbot and selecting **Duplicate**.

When you've added the interactions you want, routed them, and designed the chatbot as you like, navigate to the **Share** tab.

Install code

Installing the code is quick and easy.

In OnceHub

You'll grab the code you need for Squarespace.

1. Go to the relevant chatbot
2. Click on the **Share** tab
3. Select **Dynamic reach out → Add chatbot to targeting**.
4. Once you've added it to the right targeting audience(s), select **Installation**.
5. Copy the code.

In Squarespace

You'll add the code to your header with code injection.

1. Edit your website.
2. In the Home menu, go to **Settings → Advanced → Code injection**.
3. Add the code to the **Header** section and click **Save**.

That's it! Your website can now display your targeted chatbot on the pages you want, according to the Audience rules you set.

Adding chatbots to your Wix website

Last Modified on Mar 2, 2023

Adding a chatbot to your Wix website is quick and easy. You have three different options:

- **Widget on click** OR **lightbox on click**: A chatbot that pops up after a visitor clicks a specific button or link on your website. Engage with visitors in specific areas of your website, so you can learn more about them and qualify them further. All visitors to the page see this button or link and can click it to access the chatbot. Added to the html body of your site.
- **Dynamic reachout**: Uses Audiences, defining which type of visitors you want to target with a chatbot. You can show another Audience a different chatbot with different interactions. Added to the header.

Note:

Adding custom code may require **Premium features** and a connected domain. Learn more

Add a widget or lightbox to your website

Create the bot

Create the bot as you prefer, either from scratch or using a template.

If an existing chatbot is close to what you're wanting, you can duplicate that one instead by clicking the three-dot menu by that bot and selecting **Duplicate**.

When you've added the interactions you want, routed them, and designed the bot as you like, navigate to the **Publish** tab.

Choose between two publishing options

- **Lightbox on click:** Opens over the whole website when clicked by the visitor and captures their attention completely.
- **Widget on click:** Pops up on the bottom right of the screen, within a chat frame. The visitor interacts with your bot within the widget and can still scroll through the website page.

Install the code

In OnceHub

You'll grab the code you need for Squarespace.

1. On the **Share** tab, choose the publishing option you want (see above).
2. Copy the code.

In Wix

You'll embed a widget on your website, on each individual page where you want a chatbot. This creates an iframe on the page, where your chatbot will appear.

1. Edit your website.
2. Click + to add the widget.
3. Go to **Embed → Embed a widget**.
4. Make sure the size of the widget is large enough on your page to hold the embedded chatbot in it, as you want it displayed.
5. Paste the code from OnceHub and adjust as needed (for instance, the sizing or the text for the link).
6. Save your website.

That's it! Your website can now display your pop-up chatbot in the place you added it.

The default code you copied displays a link with the text "Start chat". You can adjust this text however you like.

Use a button instead of a link

If you want a button for your chatbot rather than a link, you can use this code, adjusting relevant parts to identify your specific chatbot and define your preferences:

```
<!-- ChatOnce embed START -->
<script id="co-index" src=""ltr" href="https://cdn.oncehub.com/co/widget.js?website_id=WEB-##########&bot_type=2" rel="noopener nofollow noreferrer" target="_blank">https://cdn.oncehub.com/co/widget.js?website_id=WEB-##########&bot_type=2" defer></script>
<a
style="
background-color: #006bb1;
border-radius: 50px;
padding: 10px;
color: #ffffff;
font-family: "Arial";
font-size:18px;
font-weight: normal;
text-decoration: none;
"
data-co-bot-display="pop-up" data-co-bot="BOT-##########" href="#" >Start chat</a>
<!-- ChatOnce embed END -->
```

Items for updating in the button code:

- **Website ID code (REQUIRED)** - This starts with **WEB-**, followed by an alphanumeric sequence you can grab from your chatbot's code on the Publish tab.
- **Bot ID code (REQUIRED)** - This starts with **BOT-**, followed by an alphanumeric sequence you can grab from your chatbot's code on the Publish tab.
- Optional styling:
  - background-color - Match your website's branding color
  - border-radius - The roundness of the button corner
  - padding - Size of the button around the text
  - color - Text color
  - font-family - The font you want the text to use
  - font-size - Size of font
  - font-weight - Normal, bold, etc.

- text-decoration - Add an underline or other styling to the text
  - Keep in mind this will show at all times, whether hovering over the button or not

Add a dynamic reachout chatbot to your website

Create the chatbot

Create the chatbot as you prefer, either from scratch or using a template.

If an existing targeted chatbot is close to what you're wanting, you can duplicate that one instead by clicking the three-dot menu by that chatbot and selecting **Duplicate**.

When you've added the interactions you want, routed them, and designed the chatbot as you like, navigate to the **Share** tab.

Install code

Installing the code is quick and easy.

In OnceHub

You'll grab the code you need for Squarespace.

1. Go to the relevant chatbot
2. Click on the **Share** tab
3. Select **Dynamic reach out → Add chatbot to targeting**.
4. Once you've added it to the right targeting audience(s), select **Installation**.
5. Copy the code.

In Wix

To add custom code to your header, you need access to Wix Premium features, a published site, and a connected domain.

1. Follow the Wix directions for adding custom code to your header.
2. For **Add code to Pages**, select **All pages**.
3. For **Place code in**, select **Head**.
4. Paste the code from OnceHub and click **Apply**.

That's it! Your website can now display your targeted chatbot on the pages you want, according to the Audience rules you set.

Adding chatbots to your Wordpress website

Last Modified on Mar 2, 2023

Adding a chatbot to your Wordpress website is quick and easy. You have three different options:

- **Widget on click** OR **lightbox on click**: A chatbot that pops up after a visitor clicks a specific button or link on your website. Engage with visitors in specific areas of your website, so you can learn more about them and qualify them further. All visitors to the page see this button or link and can click it to access the chatbot. Added to the html body of your site.
- **Dynamic reachout**: Uses Audiences, defining which type of visitors you want to target with a chatbot. You can show another Audience a different chatbot with different interactions. Added to the header.

Note:

If you are using Wordpress.com, you will need a Wordpress.com **Business** or **eCommerce** plan to use custom javascript and plugins.

If you are using a self-hosted Wordpress site, you can install any plugins you like without purchasing a Wordpress subscription.

Add a widget or lightbox to your website

Create the bot

Create the bot as you prefer, either from scratch or using a template.

If an existing chatbot is close to what you're wanting, you can duplicate that one instead by clicking the three-dot menu by that bot and selecting **Duplicate**.

When you've added the interactions you want, routed them, and designed the bot as you like, navigate to the **Publish** tab.

Choose between two publishing options

- **Lightbox on click:** Opens over the whole website when clicked by the visitor and captures their attention completely.
- **Widget on click:** Pops up on the bottom right of the screen, within a chat frame. The visitor interacts with your bot within the widget and can still scroll through the website page.

Install the code

In OnceHub

You'll grab the code you need for Squarespace.

1. On the **Share** tab, choose the publishing option you want (see above).
2. Copy the code.

In Wordpress

You'll add a custom embed plugin that allows you to add custom javascript to your pages. You'll add an embed on each individual page where you want a chatbot.

1. Install and activate the custom javascript embed plugin of your choice. Learn more
2. Edit your website.
3. Add a custom embed wherever you'd like to add a chatbot link.
4. Paste the code from OnceHub and adjust as needed (for instance, the text for the link).
5. Save your website.

That's it! Your website can now display your pop-up chatbot in the place you added it.

The default code you copied displays a link with the text "Start chat". You can adjust this text however you like.

Use a button instead of a link

If you want a button for your chatbot rather than a link, you can use this code, adjusting relevant parts to identify your specific chatbot and define your preferences:

```
<!-- ChatOnce embed START -->
<script id="co-index" src=""ltr" href="https://cdn.oncehub.com/co/widget.js?website_id=WEB-##########&bot_type=2" rel="noopener nofollow noreferrer" target="_blank">https://cdn.oncehub.com/co/widget.js?website_id=WEB-##########&bot_type=2" defer></script>
<a
style="
background-color: #006bb1;
border-radius: 50px;
padding: 10px;
color: #ffffff;
font-family: "Arial";
font-size:18px;
font-weight: normal;
text-decoration: none;
"
data-co-bot-display="pop-up" data-co-bot="BOT-##########" href="#" >Start chat</a>
<!-- ChatOnce embed END -->
```

Items for updating in the button code:

- **Website ID code (REQUIRED)** - This starts with **WEB-**, followed by an alphanumeric sequence you can grab from your chatbot's code on the Publish tab.
- **Bot ID code (REQUIRED)** - This starts with **BOT-**, followed by an alphanumeric sequence you can grab from your chatbot's code on the Publish tab.
- Optional styling:
  - background-color - Match your website's branding color
  - border-radius - The roundness of the button corner
  - padding - Size of the button around the text
  - color - Text color
  - font-family - The font you want the text to use
  - font-size - Size of font
  - font-weight - Normal, bold, etc.

- text-decoration - Add an underline or other styling to the text
  - Keep in mind this will show at all times, whether hovering over the button or not

Add a dynamic reachout chatbot to your website

Create the chatbot

Create the chatbot as you prefer, either from scratch or using a template.

If an existing targeted chatbot is close to what you're wanting, you can duplicate that one instead by clicking the three-dot menu by that chatbot and selecting **Duplicate**.

When you've added the interactions you want, routed them, and designed the chatbot as you like, navigate to the **Share** tab.

Install code

Installing the code is quick and easy.

In OnceHub

You'll grab the code you need for Squarespace.

1. Go to the relevant chatbot
2. Click on the **Share** tab
3. Select **Dynamic reach out → Add chatbot to targeting**.
4. Once you've added it to the right targeting audience(s), select **Installation**.
5. Copy the code.

In Wordpress

Your OnceHub code should be added to your site's header so it is included on every page.

The simplest way to add custom javascript code to your header in Wordpress is with a plugin.

1. Install and activate the custom header plugin of your choice. Learn more
2. Paste the custom code from OnceHub to your header and save.

That's it! Your website can now display your targeted chatbot on the pages you want, according to the Audience rules you set.

Adding chatbots to your ClickFunnels website

Last Modified on Mar 2, 2023

Adding a chatbot to your ClickFunnels website is quick and easy. You have three different options:

- **Widget on click** OR **lightbox on click**: A chatbot that pops up after a visitor clicks a specific button or link on your website. Engage with visitors in specific areas of your website, so you can learn more about them and qualify them further. All visitors to the page see this button or link and can click it to access the chatbot. Added to the html body of your site.
- **Dynamic reachout**: Uses Audiences, defining which type of visitors you want to target with a chatbot. You can show another Audience a different chatbot with different interactions. Added to the header.

Add a widget or lightbox to your website

Create the bot

Create the bot as you prefer, either from scratch or using a template.

If an existing chatbot is close to what you're wanting, you can duplicate that one instead by clicking the three-dot menu by that bot and selecting **Duplicate**.

When you've added the interactions you want, routed them, and designed the bot as you like, navigate to the **Publish** tab.

Choose between two publishing options

- **Lightbox on click:** Opens over the whole website when clicked by the visitor and captures their attention completely.
- **Widget on click:** Pops up on the bottom right of the screen, within a chat frame. The visitor interacts with your bot within the widget and can still scroll through the website page.

Install the code

In OnceHub

You'll grab the code you need for Squarespace.

1. On the **Share** tab, choose the publishing option you want (see above).
2. Copy the code.

In a text app

On your computer, in a text app, paste the code and separate it into two parts.

For **Part 1**, include the second line of your pasted code:

```
<script id="co-index" src="https://cdn.oncehub.com/co/widget.js?website_id=WEB-##########&bot_type=2" def
er></script>
```

For **Part 2**, include all the other lines of your pasted code.

```
<!-- ChatOnce embed START -->
<a data-co-bot-display="pop-up" data-co-bot="BOT-##########" href="#" >Start chat</a>
<!-- ChatOnce embed END -->
```

Note:

########## is an alphanumeric sequence unique to your account and chatbots, supplied in the pasted code.

In ClickFunnels

You'll add **Part 1** of the code from OnceHub to your header for each individual funnel page where you want a pop-up chatbot.

For **Part 2** of the code from OnceHub, you'll add a custom JS/HTML element to that funnel page. This creates an iframe on the page, where your chatbot will appear.

1. Edit your funnel page.
2. Go to **Settings → Tracking code → Header and/or Footer Tab**.
3. Add **Part 1** of the code from OnceHub to your header.
    - There may already be other code in your header, above or below where you add the OnceHub code. You can keep that code there or remove it as you prefer, depending on your preferences for keeping tracking codes for services like Google Analytics on that funnel page. Learn more
4. Go to **Elements → Add element**.
5. Scroll down to the **Misc Elements** category and select **Custom JS/HTML**.
6. Open the code editor and paste **Part 2** of the code from OnceHub. Adjust as needed (for instance, if you'd like a different height—so long as the height you choose is large enough to display any interaction on your chatbot).
    - The **Custom code type** should be **Regular HTML/JS**.
7. Save your website.

That's it! Your website can now display your pop-up chatbot in the place you added it.

The default code you copied displays a link with the text "Start chat". You can adjust this text however you like.

Use a button instead of a link

If you want a button for your chatbot rather than a link, you can use this code, adjusting relevant parts to identify your specific chatbot and define your preferences:

```
<!-- ChatOnce embed START -->
<script id="co-index" src=""ltr" href="https://cdn.oncehub.com/co/widget.js?website_id=WEB-##########&bot_t
ype=2" rel="noopener nofollow noreferrer" target="_blank">https://cdn.oncehub.com/co/widget.js?website_id=WEB-
##########&bot_type=2" defer></script>
<a
style="
background-color: #006bb1;
border-radius: 50px;
padding: 10px;
color: #ffffff;
font-family: "Arial";
font-size:18px;
font-weight: normal;
text-decoration: none;
"
data-co-bot-display="pop-up" data-co-bot="BOT-##########" href="#" >Start chat</a>
<!-- ChatOnce embed END -->
```

Items for updating in the button code:

- **Website ID code (REQUIRED)** - This starts with **WEB-**, followed by an alphanumeric sequence you can grab from your chatbot's code on the Publish tab.
- **Bot ID code (REQUIRED)** - This starts with **BOT-**, followed by an alphanumeric sequence you can grab from your chatbot's code on the Publish tab.
- Optional styling:
  - background-color - Match your website's branding color
  - border-radius - The roundness of the button corner
  - padding - Size of the button around the text
  - color - Text color
  - font-family - The font you want the text to use
  - font-size - Size of font
  - font-weight - Normal, bold, etc.
  - text-decoration - Add an underline or other styling to the text
    - Keep in mind this will show at all times, whether hovering over the button or not

Add a dynamic reachout chatbot to your website

Create the chatbot

Create the chatbot as you prefer, either from scratch or using a template.

If an existing targeted chatbot is close to what you're wanting, you can duplicate that one instead by clicking the three-dot menu by that chatbot and selecting **Duplicate**.

When you've added the interactions you want, routed them, and designed the chatbot as you like, navigate to the **Share** tab.

Install code

Installing the code is quick and easy.

In OnceHub

You'll grab the code you need for Squarespace.

1. Go to the relevant chatbot
2. Click on the **Share** tab
3. Select **Dynamic reach out → Add chatbot to targeting**.
4. Once you've added it to the right targeting audience(s), select **Installation**.
5. Copy the code.

In ClickFunnels

1. Edit your funnel page.
2. Go to **Settings** -> **Tracking code → Header and/or Footer Tab**.
3. Add the code from OnceHub to your header.
   - There may already be other code in your header, above or below where you add the OnceHub code. You can keep that code there or remove it as you prefer, depending on your preferences for keeping tracking codes for services like Google Analytics on that funnel page. Learn more

That's it! Your website can now display your targeted chatbot on the pages you want, according to the Audience rules you set.

Adding chatbots to your Hubspot website

Last Modified on Mar 2, 2023

Adding a chatbot to your Hubspot website is quick and easy. You have three different options:

- **Widget on click** OR **lightbox on click**: A chatbot that pops up after a visitor clicks a specific button or link on your website. Engage with visitors in specific areas of your website, so you can learn more about them and qualify them further. All visitors to the page see this button or link and can click it to access the chatbot. Added to the html body of your site.
- **Dynamic reachout**: Uses Audiences, defining which type of visitors you want to target with a chatbot. You can show another Audience a different chatbot with different interactions. Added to the header.

Note:

Adding custom javascript requires a Hubspot paid plan with access to website pages and custom modules.

Add a widget or lightbox to your website

Create the bot

Create the bot as you prefer, either from scratch or using a template.

If an existing chatbot is close to what you're wanting, you can duplicate that one instead by clicking the three-dot menu by that bot and selecting **Duplicate**.

When you've added the interactions you want, routed them, and designed the bot as you like, navigate to the **Publish** tab.

Choose between two publishing options

- **Lightbox on click:** Opens over the whole website when clicked by the visitor and captures their attention completely.
- **Widget on click:** Pops up on the bottom right of the screen, within a chat frame. The visitor interacts with your bot within the widget and can still scroll through the website page.

Install the code

In OnceHub

You'll grab the code you need for Squarespace.

1. On the **Share** tab, choose the publishing option you want (see above).
2. Copy the code.

In Hubspot

To add custom javascript, you need to create a custom module with javascript required for loading. You'll add this module on each individual website page where you want a chatbot.

1. Create a custom module that includes the OnceHub code.
2. Adjust the code as needed (for instance, the text for the link).
3. Make sure the module uses the **require_js** function. This will require the javascript to load for that module to work.
4. Add the custom module to your website page wherever you want it to display.
5. Save your website.

That's it! Your website can now display your pop-up chatbot in the place you added it.

The default code you copied displays a link with the text "Start chat". You can adjust this text however you like.

Use a button instead of a link

If you want a button for your chatbot rather than a link, you can use this code, adjusting relevant parts to identify your specific chatbot and define your preferences:

```
<!-- ChatOnce embed START -->
<script id="co-index" src=""ltr" href="https://cdn.oncehub.com/co/widget.js?website_id=WEB-##########&bot_type=2" rel="noopener nofollow noreferrer" target="_blank">https://cdn.oncehub.com/co/widget.js?website_id=WEB-##########&bot_type=2" defer></script>
<a
style="
background-color: #006bb1;
border-radius: 50px;
padding: 10px;
color: #ffffff;
font-family: "Arial";
font-size:18px;
font-weight: normal;
text-decoration: none;
"
data-co-bot-display="pop-up" data-co-bot="BOT-##########" href="#" >Start chat</a>
<!-- ChatOnce embed END -->
```

Items for updating in the button code:

- **Website ID code (REQUIRED)** - This starts with **WEB-**, followed by an alphanumeric sequence you can grab from your chatbot's code on the Publish tab.
- **Bot ID code (REQUIRED)** - This starts with **BOT-**, followed by an alphanumeric sequence you can grab from your chatbot's code on the Publish tab.
- Optional styling:
  - background-color - Match your website's branding color
  - border-radius - The roundness of the button corner
  - padding - Size of the button around the text
  - color - Text color
  - font-family - The font you want the text to use
  - font-size - Size of font
  - font-weight - Normal, bold, etc.
  - text-decoration - Add an underline or other styling to the text
    - Keep in mind this will show at all times, whether hovering over the button or not

Add a dynamic reachout chatbot to your website

Create the chatbot

Create the chatbot as you prefer, either from scratch or using a template.

If an existing targeted chatbot is close to what you're wanting, you can duplicate that one instead by clicking the three-dot menu by that chatbot and selecting **Duplicate**.

When you've added the interactions you want, routed them, and designed the chatbot as you like, navigate to the **Share** tab.

Install code

Installing the code is quick and easy.

In OnceHub

You'll grab the code you need for Squarespace.

1. Go to the relevant chatbot
2. Click on the **Share** tab
3. Select **Dynamic reach out → Add chatbot to targeting**.
4. Once you've added it to the right targeting audience(s), select **Installation**.
5. Copy the code.

In Hubspot

You'll add the code to your header, so it displays on every page of your site.

1. Edit your Hubspot content.
2. Go to **Advanced options** and add the code to the Head HTML. Learn more
3. Save your content.

That's it! Your website can now display your targeted chatbot on the pages you want, according to the Audience rules you set.

Adding chatbots to your GoDaddy website

Last Modified on Mar 2, 2023

Adding a chatbot to your GoDaddy website is quick and easy. You have three different options:

- **Widget on click** OR **lightbox on click**: A chatbot that pops up after a visitor clicks a specific button or link on your website. Engage with visitors in specific areas of your website, so you can learn more about them and qualify them further. All visitors to the page see this button or link and can click it to access the chatbot. Added to the html body of your site.
- **Dynamic reachout**: Uses Audiences, defining which type of visitors you want to target with a chatbot. You can show another Audience a different chatbot with different interactions. Added to the header.

Note:

Adding custom javascript requires a GoDaddy **Business** or **Commerce** plan.

Add a widget or lightbox to your website

Create the bot

Create the bot as you prefer, either from scratch or using a template.

If an existing chatbot is close to what you're wanting, you can duplicate that one instead by clicking the three-dot menu by that bot and selecting **Duplicate**.

When you've added the interactions you want, routed them, and designed the bot as you like, navigate to the **Publish** tab.

Choose between two publishing options

- **Lightbox on click:** Opens over the whole website when clicked by the visitor and captures their attention completely.
- **Widget on click:** Pops up on the bottom right of the screen, within a chat frame. The visitor interacts with your bot within the widget and can still scroll through the website page.

Install the code

In OnceHub

You'll grab the code you need for Squarespace.

1. On the **Share** tab, choose the publishing option you want (see above).
2. Copy the code.

In GoDaddy

You'll add a custom code section to your website, on each individual page where you want a chatbot. This creates an iframe on the page, where your chatbot will appear.

1. Edit your website in the Website Builder.
2. In the place you want to add your pop-up chatbot link, add a custom code section.
3. Go to **Files & Web → HTML** and select **Add**.
4. Paste the code from OnceHub into the **Custom Code** field and adjust as needed (for instance, the text for the link).
5. Make sure the **Forced Height** field is high enough to display the Lightbox.
6. Save your website.

That's it! Your website can now display your pop-up chatbot in the place you added it.

The default code you copied displays a link with the text "Start chat". You can adjust this text however you like.

Use a button instead of a link

If you want a button for your chatbot rather than a link, you can use this code, adjusting relevant parts to identify your specific chatbot and define your preferences:

```
<!-- ChatOnce embed START -->
<script id="co-index" src=""ltr" href="https://cdn.oncehub.com/co/widget.js?website_id=WEB-##########&bot_t
ype=2" rel="noopener nofollow noreferrer" target="_blank">https://cdn.oncehub.com/co/widget.js?website_id=WEB-
##########&bot_type=2" defer></script>
<a
style="
background-color: #006bb1;
border-radius: 50px;
padding: 10px;
color: #ffffff;
font-family: "Arial";
font-size:18px;
font-weight: normal;
text-decoration: none;
"
data-co-bot-display="pop-up" data-co-bot="BOT-##########" href="#" >Start chat</a>
<!-- ChatOnce embed END -->
```

Items for updating in the button code:

- **Website ID code (REQUIRED)** - This starts with **WEB-**, followed by an alphanumeric sequence you can grab from your chatbot's code on the Publish tab.
- **Bot ID code (REQUIRED)** - This starts with **BOT-**, followed by an alphanumeric sequence you can grab from your chatbot's code on the Publish tab.
- Optional styling:
  - background-color - Match your website's branding color
  - border-radius - The roundness of the button corner
  - padding - Size of the button around the text
  - color - Text color
  - font-family - The font you want the text to use
  - font-size - Size of font
  - font-weight - Normal, bold, etc.
  - text-decoration - Add an underline or other styling to the text

- Keep in mind this will show at all times, whether hovering over the button or not

Add a dynamic reachout chatbot to your website

Create the chatbot

Create the chatbot as you prefer, either from scratch or using a template.

If an existing targeted chatbot is close to what you're wanting, you can duplicate that one instead by clicking the three-dot menu by that chatbot and selecting **Duplicate**.

When you've added the interactions you want, routed them, and designed the chatbot as you like, navigate to the **Share** tab.

Install code

Installing the code is quick and easy.

In OnceHub

You'll grab the code you need for Squarespace.

1. Go to the relevant chatbot
2. Click on the **Share** tab
3. Select **Dynamic reach out → Add chatbot to targeting**.
4. Once you've added it to the right targeting audience(s), select **Installation**.
5. Copy the code.

In GoDaddy

You'll add the code to your header.

1. Edit your website.
2. In the left panel, click **Settings**.
3. Click **Head HTML**. Learn more
4. Add the code to the **Head HTML** section and click **Save**.

That's it! Your website can now display your targeted chatbot on the pages you want, according to the Audience rules you set.

Adding chatbots to your Weebly website

Last Modified on Mar 2, 2023

Adding a chatbot to your Weebly website is quick and easy. You have three different options:

- **Widget on click** OR **lightbox on click**: A chatbot that pops up after a visitor clicks a specific button or link on your website. Engage with visitors in specific areas of your website, so you can learn more about them and qualify them further. All visitors to the page see this button or link and can click it to access the chatbot. Added to the html body of your site.
- **Dynamic reachout**: Uses Audiences, defining which type of visitors you want to target with a chatbot. You can show another Audience a different chatbot with different interactions. Added to the header.

> **Note:**
>
> Adding custom javascript requires a **Weebly** Professional or Performance plan.

Add a widget or lightbox to your website

Create the bot

Create the bot as you prefer, either from scratch or using a template.

If an existing chatbot is close to what you're wanting, you can duplicate that one instead by clicking the three-dot menu by that bot and selecting **Duplicate**.

When you've added the interactions you want, routed them, and designed the bot as you like, navigate to the **Publish** tab.

Choose between two publishing options

- **Lightbox on click:** Opens over the whole website when clicked by the visitor and captures their attention completely.
- **Widget on click:** Pops up on the bottom right of the screen, within a chat frame. The visitor interacts with your bot within the widget and can still scroll through the website page.

Install the code

In OnceHub

You'll grab the code you need for Squarespace.

1. On the **Share** tab, choose the publishing option you want (see above).
2. Copy the code.

In Weebly

You'll add an **Embed Code** element to your website, on each individual page where you want a chatbot.

1. Edit your website.
2. Add an **Embed code** element to the site.
3. Click on the element and **Edit Custom HTML**.
4. Paste the code from OnceHub and adjust as needed (for instance, the text for the link).
5. Publish your website.

That's it! Your website can now display your pop-up chatbot in the place you added it.

The default code you copied displays a link with the text "Start chat". You can adjust this text however you like.

Use a button instead of a link

If you want a button for your chatbot rather than a link, you can use this code, adjusting relevant parts to identify your specific chatbot and define your preferences:

```
<!-- ChatOnce embed START -->
<script id="co-index" src=""ltr" href="https://cdn.oncehub.com/co/widget.js?website_id=WEB-##########&bot_type=2" rel="noopener nofollow noreferrer" target="_blank">https://cdn.oncehub.com/co/widget.js?website_id=WEB-##########&bot_type=2" defer></script>
<a
style="
background-color: #006bb1;
border-radius: 50px;
padding: 10px;
color: #ffffff;
font-family: "Arial";
font-size:18px;
font-weight: normal;
text-decoration: none;
"
data-co-bot-display="pop-up" data-co-bot="BOT-##########" href="#" >Start chat</a>
<!-- ChatOnce embed END -->
```

Items for updating in the button code:

- **Website ID code (REQUIRED)** - This starts with **WEB-**, followed by an alphanumeric sequence you can grab from your chatbot's code on the Publish tab.
- **Bot ID code (REQUIRED)** - This starts with **BOT-**, followed by an alphanumeric sequence you can grab from your chatbot's code on the Publish tab.
- Optional styling:
  - background-color - Match your website's branding color
  - border-radius - The roundness of the button corner
  - padding - Size of the button around the text
  - color - Text color
  - font-family - The font you want the text to use
  - font-size - Size of font
  - font-weight - Normal, bold, etc.
  - text-decoration - Add an underline or other styling to the text
    - Keep in mind this will show at all times, whether hovering over the button or not

Add a dynamic reachout chatbot to your website

Create the chatbot

Create the chatbot as you prefer, either from scratch or using a template.

If an existing targeted chatbot is close to what you're wanting, you can duplicate that one instead by clicking the three-dot menu by that chatbot and selecting **Duplicate**.

When you've added the interactions you want, routed them, and designed the chatbot as you like, navigate to the **Share** tab.

Install code

Installing the code is quick and easy.

In OnceHub

You'll grab the code you need for Squarespace.

1. Go to the relevant chatbot
2. Click on the **Share** tab
3. Select **Dynamic reach out → Add chatbot to targeting**.
4. Once you've added it to the right targeting audience(s), select **Installation**.
5. Copy the code.

In Weebly

You'll add the code to your header so it's added to all pages.

1. Edit your website.
2. Go to **Theme → Edit HTML / CSS** in the lower left-hand menu → Select **header.html**.
3. Add the code to the header doc and click **Save**.

That's it! Your website can now display your targeted chatbot on the pages you want, according to the Audience rules you set.

Adding chatbots to your Unbounce landing page

Last Modified on Mar 2, 2023

Adding a chatbot to your Unbounce landing page is quick and easy. You have three different options:

- **Widget on click** OR **lightbox on click**: A chatbot that pops up after a visitor clicks a specific button or link on your website. Engage with visitors in specific areas of your website, so you can learn more about them and qualify them further. All visitors to the page see this button or link and can click it to access the chatbot. Added to the html body of your site.
- **Dynamic reachout**: Uses Audiences, defining which type of visitors you want to target with a chatbot. You can show another Audience a different chatbot with different interactions. Added to the header.

> **Note:**
>
> You can add custom javascript when working in the Classic Unbounce Builder only.

Add a widget or lightbox to your website

Create the bot

Create the bot as you prefer, either from scratch or using a template.

If an existing chatbot is close to what you're wanting, you can duplicate that one instead by clicking the three-dot menu by that bot and selecting **Duplicate**.

When you've added the interactions you want, routed them, and designed the bot as you like, navigate to the **Publish** tab.

Choose between two publishing options

- **Lightbox on click:** Opens over the whole website when clicked by the visitor and captures their attention completely.
- **Widget on click:** Pops up on the bottom right of the screen, within a chat frame. The visitor interacts with your bot within the widget and can still scroll through the website page.

Install the code

In OnceHub

You'll grab the code you need for Squarespace.

1. On the **Share** tab, choose the publishing option you want (see above).
2. Copy the code.

In Unbounce

In the Classic Builder, you'll use a custom HTML widget in each individual place where you want a chatbot. This creates an iframe on the page, where your chatbot will appear.

1. Edit your landing page.
2. Click to add a custom HTML widget.
3. In the **Embed Custom HTML Code** section, paste the code from OnceHub and adjust as needed (for instance, the text for the link).
4. Make sure the size of the widget is large enough on your page to hold the embedded chatbot in it, as you want it displayed. This may require multiple attempts as you adjust and preview.
5. Save your page.

That's it! Your landing page can now display your pop-up chatbot in the place you added it.

The default code you copied displays a link with the text "Start chat". You can adjust this text however you like.

Use a button instead of a link

If you want a button for your chatbot rather than a link, you can use this code, adjusting relevant parts to identify your specific chatbot and define your preferences:

```
<!-- ChatOnce embed START -->
<script id="co-index" src=""ltr" href="https://cdn.oncehub.com/co/widget.js?website_id=WEB-##########&bot_type=2" rel="noopener nofollow noreferrer" target="_blank">https://cdn.oncehub.com/co/widget.js?website_id=WEB-##########&bot_type=2" defer></script>
<a
style="
background-color: #006bb1;
border-radius: 50px;
padding: 10px;
color: #ffffff;
font-family: "Arial";
font-size:18px;
font-weight: normal;
text-decoration: none;
"
data-co-bot-display="pop-up" data-co-bot="BOT-##########" href="#" >Start chat</a>
<!-- ChatOnce embed END -->
```

Items for updating in the button code:

- **Website ID code (REQUIRED)** - This starts with **WEB-**, followed by an alphanumeric sequence you can grab from your chatbot's code on the Publish tab.
- **Bot ID code (REQUIRED)** - This starts with **BOT-**, followed by an alphanumeric sequence you can grab from your chatbot's code on the Publish tab.
- Optional styling:
  - background-color - Match your website's branding color
  - border-radius - The roundness of the button corner
  - padding - Size of the button around the text
  - color - Text color
  - font-family - The font you want the text to use
  - font-size - Size of font
  - font-weight - Normal, bold, etc.
  - text-decoration - Add an underline or other styling to the text

- Keep in mind this will show at all times, whether hovering over the button or not

Add a dynamic reachout chatbot to your website

Create the chatbot

Create the chatbot as you prefer, either from scratch or using a template.

If an existing targeted chatbot is close to what you're wanting, you can duplicate that one instead by clicking the three-dot menu by that chatbot and selecting **Duplicate**.

When you've added the interactions you want, routed them, and designed the chatbot as you like, navigate to the **Share** tab.

Install code

Installing the code is quick and easy.

In OnceHub

You'll grab the code you need for Squarespace.

1. Go to the relevant chatbot
2. Click on the **Share** tab
3. Select **Dynamic reach out → Add chatbot to targeting**.
4. Once you've added it to the right targeting audience(s), select **Installation**.
5. Copy the code.

In Unbounce

You'll add the javascript code to your header.

1. Edit your landing page in the Classic Builder.
2. In the lower menu, click the **Javascripts** button.
3. For the **Placement** option, add it to the **Head** section and click **Done**.
4. **Save** your page to finalize the change.

That's it! Your landing page can now display your targeted chatbot, according to the Audience rules you set.

Adding chatbots to your Leadpages landing page

Last Modified on Mar 2, 2023

Adding a chatbot to your Leadpages landing page is quick and easy. You have three different options:

- **Widget on click** OR **lightbox on click**: A chatbot that pops up after a visitor clicks a specific button or link on your website. Engage with visitors in specific areas of your website, so you can learn more about them and qualify them further. All visitors to the page see this button or link and can click it to access the chatbot. Added to the html body of your site.
- **Dynamic reachout**: Uses Audiences, defining which type of visitors you want to target with a chatbot. You can show another Audience a different chatbot with different interactions. Added to the header.

Add a widget or lightbox to your website

Create the bot

Create the bot as you prefer, either from scratch or using a template.

If an existing chatbot is close to what you're wanting, you can duplicate that one instead by clicking the three-dot menu by that bot and selecting **Duplicate**.

When you've added the interactions you want, routed them, and designed the bot as you like, navigate to the **Publish** tab.

Choose between two publishing options

- **Lightbox on click:** Opens over the whole website when clicked by the visitor and captures their attention completely.
- **Widget on click:** Pops up on the bottom right of the screen, within a chat frame. The visitor interacts with your bot within the widget and can still scroll through the website page.

Install the code

In OnceHub

You'll grab the code you need for Squarespace.

1. On the **Share** tab, choose the publishing option you want (see above).
2. Copy the code.

In Leadpages

You'll add an HTML widget on your landing page, in each place where you want a chatbot. This creates an iframe on the page, where your chatbot will appear.

1. Edit your landing page.
2. Click **Widgets** and drag the **HTML** widget onto your page. You may have to click **Show More** if HTML isn't listed. Learn more about the HTML widget

3. Paste the code from OnceHub and adjust as needed (for instance, the text for the link).
4. Save the widget.
5. Make sure the size of the widget is large enough on your page to hold the embedded chatbot in it, as you want it displayed.
6. Publish/update your landing page.

That's it! Your landing page can now display your pop-up chatbot in the place you added it.

The default code you copied displays a link with the text "Start chat". You can adjust this text however you like.

Use a button instead of a link

If you want a button for your chatbot rather than a link, you can use this code, adjusting relevant parts to identify your specific chatbot and define your preferences:

```
<!-- ChatOnce embed START -->
<script id="co-index" src=""ltr" href="https://cdn.oncehub.com/co/widget.js?website_id=WEB-##########&bot_type=2" rel="noopener nofollow noreferrer" target="_blank">https://cdn.oncehub.com/co/widget.js?website_id=WEB-##########&bot_type=2" defer></script>
<a
style="
background-color: #006bb1;
border-radius: 50px;
padding: 10px;
color: #ffffff;
font-family: "Arial";
font-size:18px;
font-weight: normal;
text-decoration: none;
"
data-co-bot-display="pop-up" data-co-bot="BOT-##########" href="#" >Start chat</a>
<!-- ChatOnce embed END -->
```

Items for updating in the button code:

- **Website ID code (REQUIRED)** - This starts with **WEB-**, followed by an alphanumeric sequence you can grab from your chatbot's code on the Publish tab.
- **Bot ID code (REQUIRED)** - This starts with **BOT-**, followed by an alphanumeric sequence you can grab from your chatbot's code on the Publish tab.
- Optional styling:
  - background-color - Match your website's branding color
  - border-radius - The roundness of the button corner
  - padding - Size of the button around the text
  - color - Text color
  - font-family - The font you want the text to use
  - font-size - Size of font
  - font-weight - Normal, bold, etc.
  - text-decoration - Add an underline or other styling to the text
    - Keep in mind this will show at all times, whether hovering over the button or not

Add a dynamic reachout chatbot to your website

Create the chatbot

Create the chatbot as you prefer, either from scratch or using a template.

If an existing targeted chatbot is close to what you're wanting, you can duplicate that one instead by clicking the three-dot menu by that chatbot and selecting **Duplicate**.

When you've added the interactions you want, routed them, and designed the chatbot as you like, navigate to the **Share** tab.

Install code

Installing the code is quick and easy.

In OnceHub

You'll grab the code you need for Squarespace.

1. Go to the relevant chatbot
2. Click on the **Share** tab
3. Select **Dynamic reach out → Add chatbot to targeting**.
4. Once you've added it to the right targeting audience(s), select **Installation**.
5. Copy the code.

In Leadpages

You'll add the code to your header with code injection.

1. Go to **Settings** for your landing page.
2. Select Analytics.
3. Add the code to the **Head Section Tracking Code** section and click **Save**, then **Update**.

That's it! Your landing page can now display your targeted chatbot on the pages you want, according to the Audience rules you set.

Learn more about updating this section in Leadpages.

Add an AI bot

Last Modified on Sep 21, 2023

With our AI bot, you can provide your visitors with valuable information through an automated chatbot. They can get the answers they need easily, without using up your employees' time and energy.

Adding the AI bot to your chatbot is simple.

1) Go to the relevant chatbot.

2) In the lefthand pane, **Add interaction**, select the action **AI bot** (Figure 1).

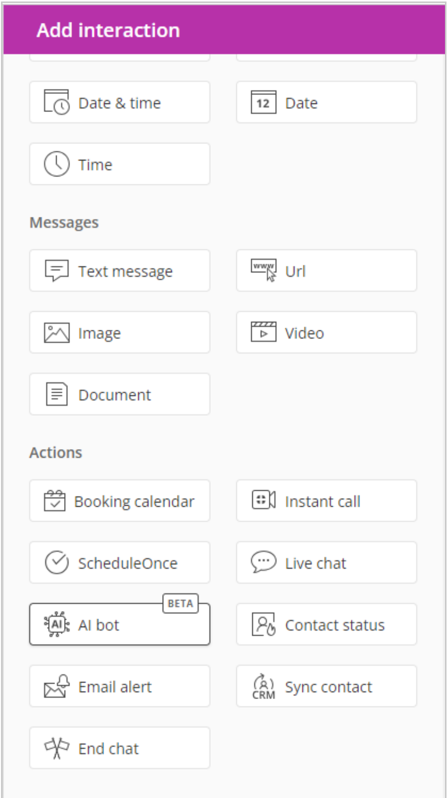


Figure 1: AI bot interaction

3) Drag and drop the AI bot interaction into the conversation on the left. You can drag the interaction to the place you'd like visitors to experience the AI bot.

4) Configure the AI bot settings (Figure 2).

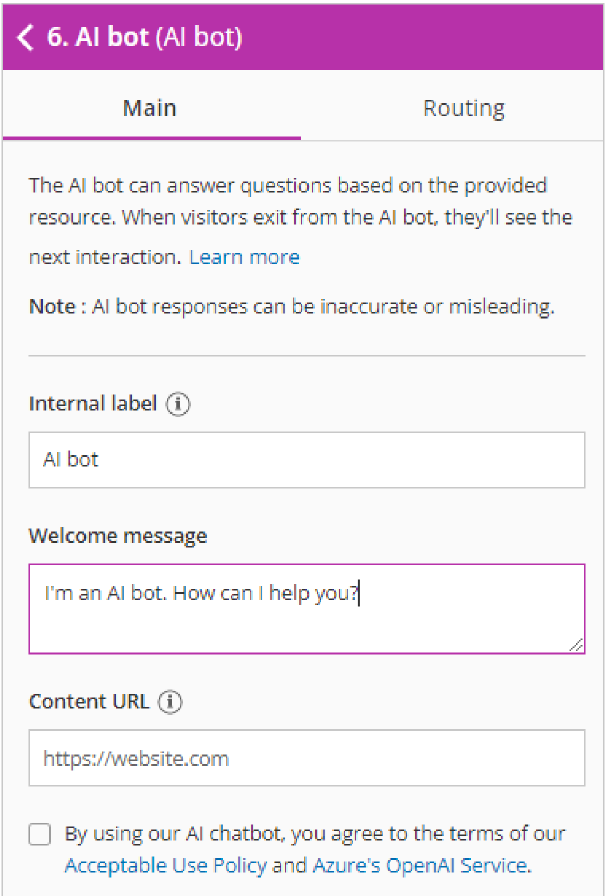


FIgure 2: AI bot settings

The settings you can configure are:

- **Internal label:** This is the name you'll see for this interaction inside your OnceHub account. Visitors to your bot will not see this label.
- **Welcome message:** The message that greets visitors when the chatbot conversation they're interacting with reaches the AI bot.
- **Content URL:** The URL of the site where the AI bot will gather information, in order to answer questions for your visitors. For instance, this could be a collection of articles your organization wrote. You can either add your entire website domain or a part of it, by providing a URL to a subfolder on that domain (for instance: http://www.website.com/example). The AI bot will answer all questions based on the content of this URL. If it links to other pages on the same domain, it will include that content as well.

5) Wait as the AI bot builds your knowledgebase (Figure 3).

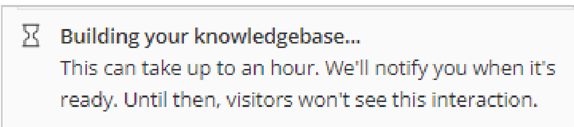


Figure 3: Wait message

In certain cases, building the AI bot's knowledgebase could take longer than an hour, depending on the size of the website.

6) Add the chatbot to your website or to a OnceHub page, where your visitors can interact with it.

7) Test the bot. Keep in mind that the AI bot's answers may be inaccurate at times. We recommend you test it

thoroughly to confirm what it will say, based on the content URL's information.

8) As visitors access your AI bot, we recommend you review questions and answers regularly in your activity stream. This will give you an idea of what people are asking and how accurate the AI bot may be for those questions. Based on the questions and answers, you may want to adjust the content and refresh the AI bot's content URL periodically.

Note:

When the visitor ends their chat with the AI bot, they will see whichever interaction is next in the conversation.

Building a routing form

Last Modified on Dec 27, 2024

There's so much you can do with routing forms, but here's a quick rundown of the most important things you should know as you're getting started. This guide shows you the main steps needed to take routing forms live on your website.

The main purpose of a routing form is to engage with visitors on your website through an interactive form, asking questions that qualify them to schedule meetings with your team or chat with them further.

After filling out a routing form, a user's answers determine whether they're offered a time to schedule with your team or the opportunity to chat live with them.

We understand that personalization leads to better engagement in your visitors' website experience. You can create a different routing form for each experience your visitors may have, according to their needs and your business objectives. You can also create one form with multiple paths, taking your visitors through the best interactions for them with conditional routing.

This allows you to customize their experience seamlessly, providing the most effective messaging for that specific audience under the given circumstances. It also raises the likelihood of identifying the right prospects for your team to engage with as high-quality leads.

Creating a routing form

You can create as many routing forms as you like for different pages on your website.

You can access your routing form builder by going to **Routing forms** on the left **→ Create routing form** button.

Here, you'll find the lobby, where you can create new and manage existing routing forms. You can search through your existing forms by typing the name of the form (or, if you're an account admin, the owner's name) or the routing form's share link in the search box.

Start from scratch: You'll start building your routing form with a blank canvas.

Use a template: Choose from one of our many, ready-made templates. The correct template saves time by providing an example routing form you'll adjust according to preference.

Duplicate an existing routing form: If an already-existing form is similar to what you're wanting, you can duplicate that form and tweak it to suit your preferences. Click the three dots on the right-hand side of that specific form and select **Duplicate**.

Building your routing form

Drag and drop interactions into the form's column in the order you prefer.

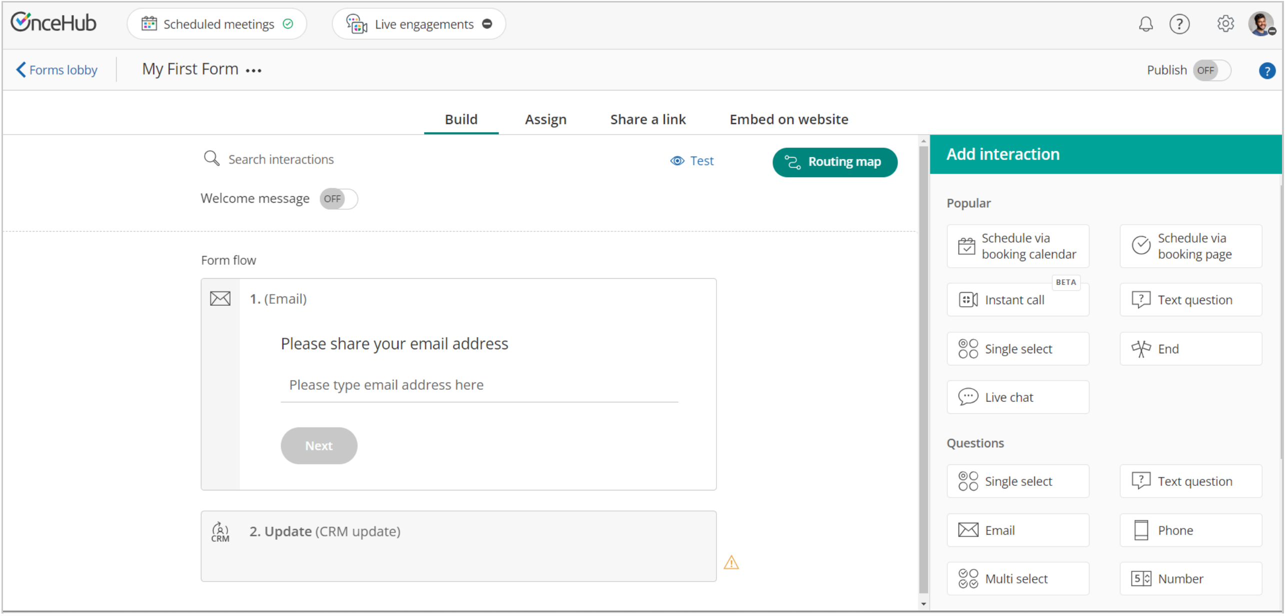


Figure 2: Add a form interaction

You have many interaction options for your routing form, allowing you to:

- Ask questions to qualify visitors
- Send follow-up questions depending on their answer, to personalize the experience further
- Offer scheduling to qualified visitors, based on their answers

Interaction options

Questions

You can drag and drop your chosen interactions into your form from the **Interaction** section on the right (if you click an interaction, it will add to the bottom of the form). They will be routed according to the rules you configure (see below).

Question types

Questions require the visitor to respond before continuing the form.

You can choose from various question field types:

- **Single select**: Multiple answer options. The visitor can only select one answer.
- **Multi select**: Multiple answer options. The visitor can select one or more answers.
- **Text question**: Let the visitor answer in their own words
- **Number:** Let the visitor answer with a numerical value.
- **Email**: Request the visitor's email address.
- **Phone**: Request the visitor's phone number.

Actions

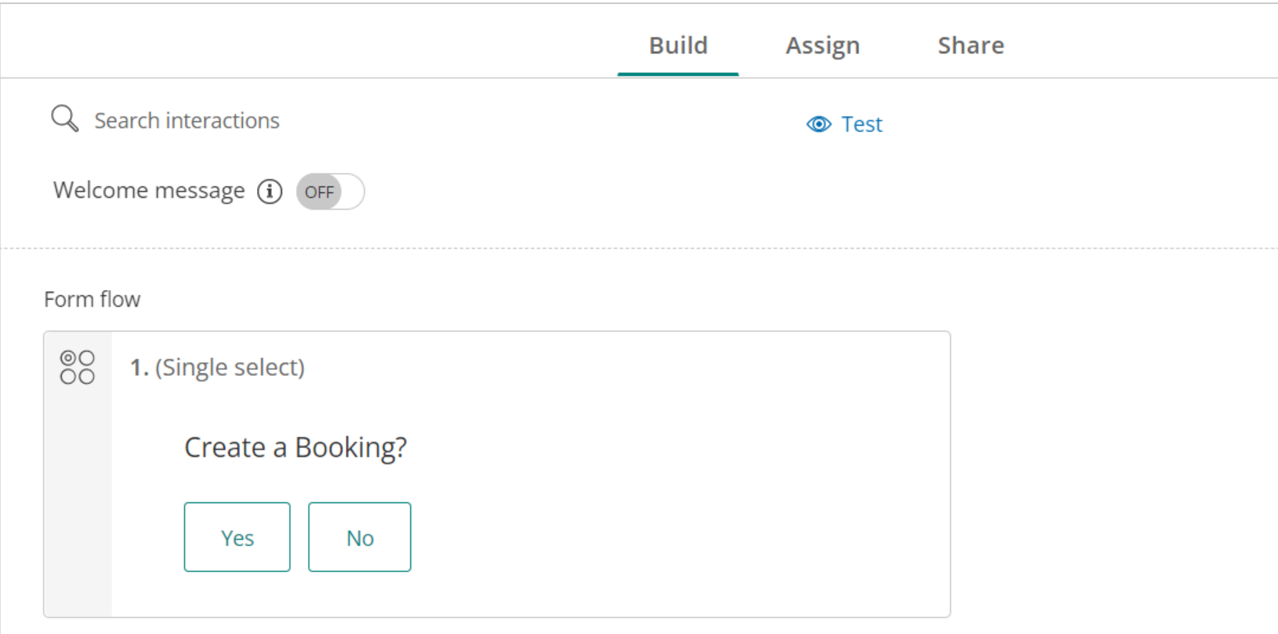
Actions cause something to happen when the visitor reaches that interaction. This could be something they see or something only your users see, hidden from the visitor, depending on the action.

Action types

- **Schedule via booking calendar**: Offer them to schedule with you through a booking calendar, without leaving the form. You can offer scheduling to everyone or only route qualified visitors to this action.
- **Schedule via booking page**: Offer them to schedule with you through a booking page, without leaving the form. You can offer scheduling to everyone or only route qualified visitors to this action.
- **Email alert**: Send an internal email alert, invisible to your visitor, when they reach a specific part of the form. You can alert people on your team about qualified visitors who answer in a specific way.
- **Contact status**: Indicate a status (Qualified, Marketing qualified, Sales qualified, or Disqualified) for the contact so you can set other processes in motion on your end based on that status. You can also use this data to optimize your interaction flow, determining the efficiency of your campaigns.
- **Live chat**: Route the visitor to a live chat meeting.
- **End**: End the engagement completely. Your form will not send any more interactions. You cannot route the End action to another interaction.

Preview your routing form

To see a preview, click on the eye icon at any time as you're building your form. You can preview everything as your audience would experience it.



Preview your form

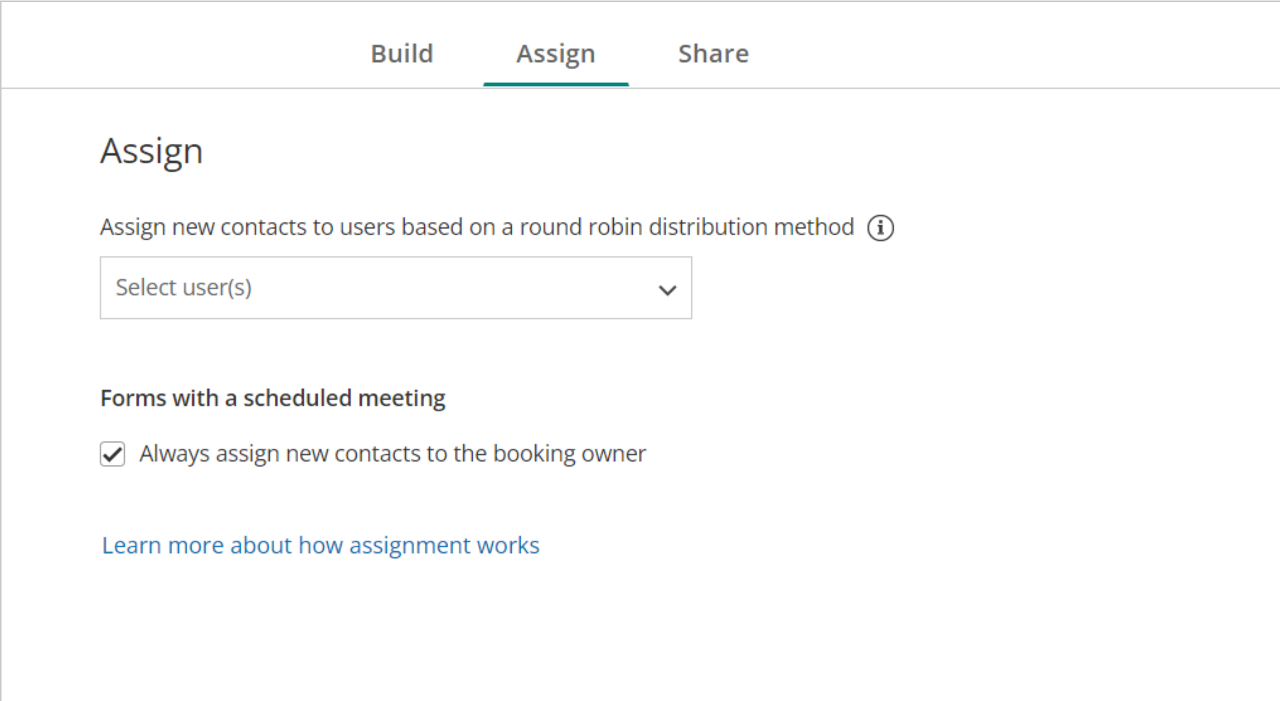
Assigning team members to the form

In the **Assign** tab, you can assign new contacts to team members. This means they'll be the owner of that contact in their activity stream.

If an admin has allowed member users to create and manage forms, members will be able to see any chatbots an admin assigned to them. Turn this permission on or off by selecting the gear icon in the top right corner → **Settings and permissions → Member permissions**.

1) Assign to a specific team member. If you select multiple people, they'll be assigned the contact based on round robin distribution.

2) If you offer scheduling, you can assign the contact to the team member who received the booking.



Assigning a contact to a team member

Setting your routing form interactions

You can route your interactions by choosing conditions and deciding what to jump to next.

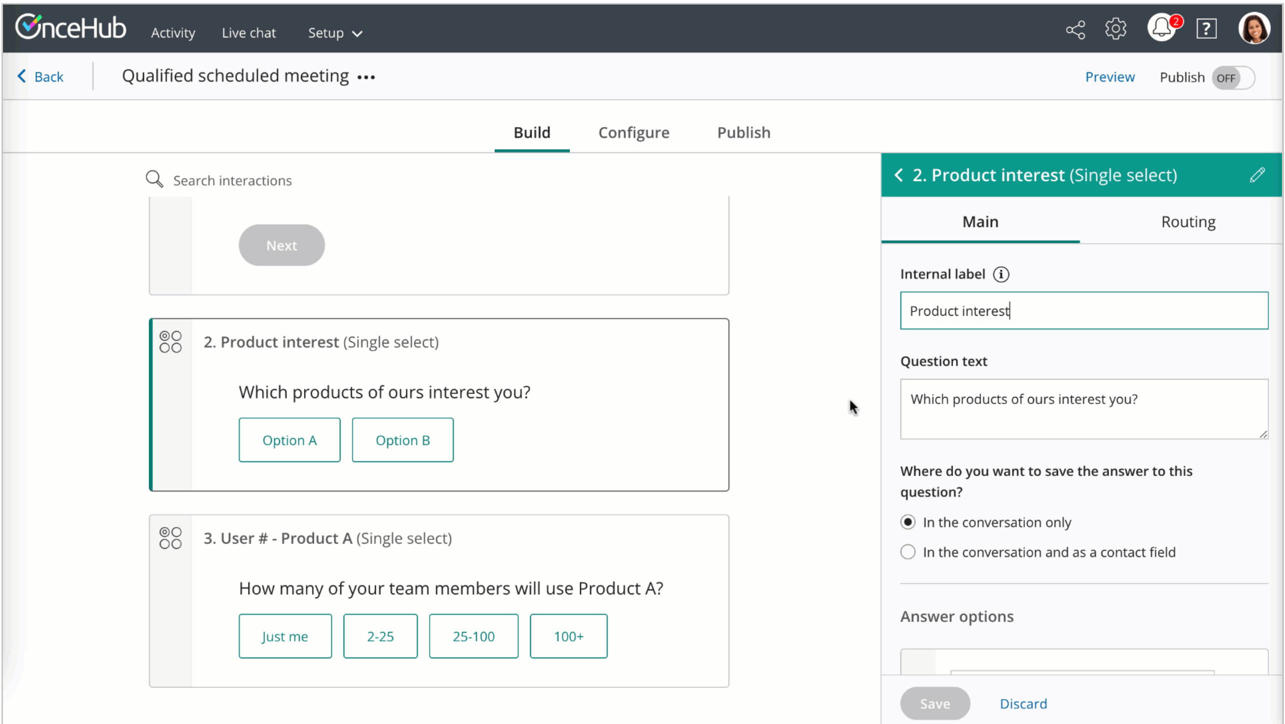


Figure 1: Route to interactions based on rules

You can get really specific about the routing logic you want. The logic can depend on how your visitor answers the current question or a previous one. You can also base the logic on a contact field already saved to their contact record (for instance, the **Company size** field).

How does routing work?

You can route your interactions by choosing conditions and deciding what your visitors should see next. Either create your next interaction as you route to it OR route to an interaction you've already created.

You can route to the next interaction in two different ways:

- Always route to specific interaction
- Route to interactions based on rules

If you route based on rules, you have three options:

- Route based on this interaction's answer
- Route based on a previous answer
- Route based on a contact field (for example, their company or team size)

How can routing be used?

Qualify a website visitor as they fill out the routing form

To keep your team working efficiently, you may not want to meet with every website visitor, but may place high value on scheduling a meeting with qualified visitors. You can ask targeted questions in your form, routing them either to interactions that do not offer scheduling if you determine this is suitable, or to a scheduling or live chat interaction if they do qualify to meet with your team, based on your criteria.

Set the path for the routing form interactions

You can provide the most optimal experience for a specific website visitor by routing them to the right interactions. This can be based on the options the website visitor selected in a previous or current interaction, or based on information you may already have about them.

Routing options

Your routing rules allow you to specify what happens next in your form. Which interaction does your visitors see after this one? This may depend on their answer to this interaction or a previous one, or based on who they are (a saved contact field).

The interaction you route to next can be one you've already created or you can create it on the spot as you route to it.

You have multiple routing options:

- **Always route to a specific interaction:** If you always want them to see a specific interaction next, no matter the audience's answer, choose this option.
- **Route to interactions based on rules:** If you'd rather send them down one interaction path if they answer a question a certain way, or another path if they answer differently, select this option. You can base this on:
  - The response of the current interaction
  - The response to previous interactions
  - The contact field values you already have for this visitor

Remember, you cannot route the End action to another interaction.

Offer scheduling with your routing form

Your form can offer scheduling to your visitors. They can schedule with any available team member with the right skillset.

How does it work?

Adding a schedule action into your form allows you to schedule with your visitors. This may be everyone who visits or you can narrow it down and only offer scheduling to qualified visitors, using routing rules.

Offering scheduling within the form provides a seamless experience for your visitors. They'll never leave your site as they book with the right team member.

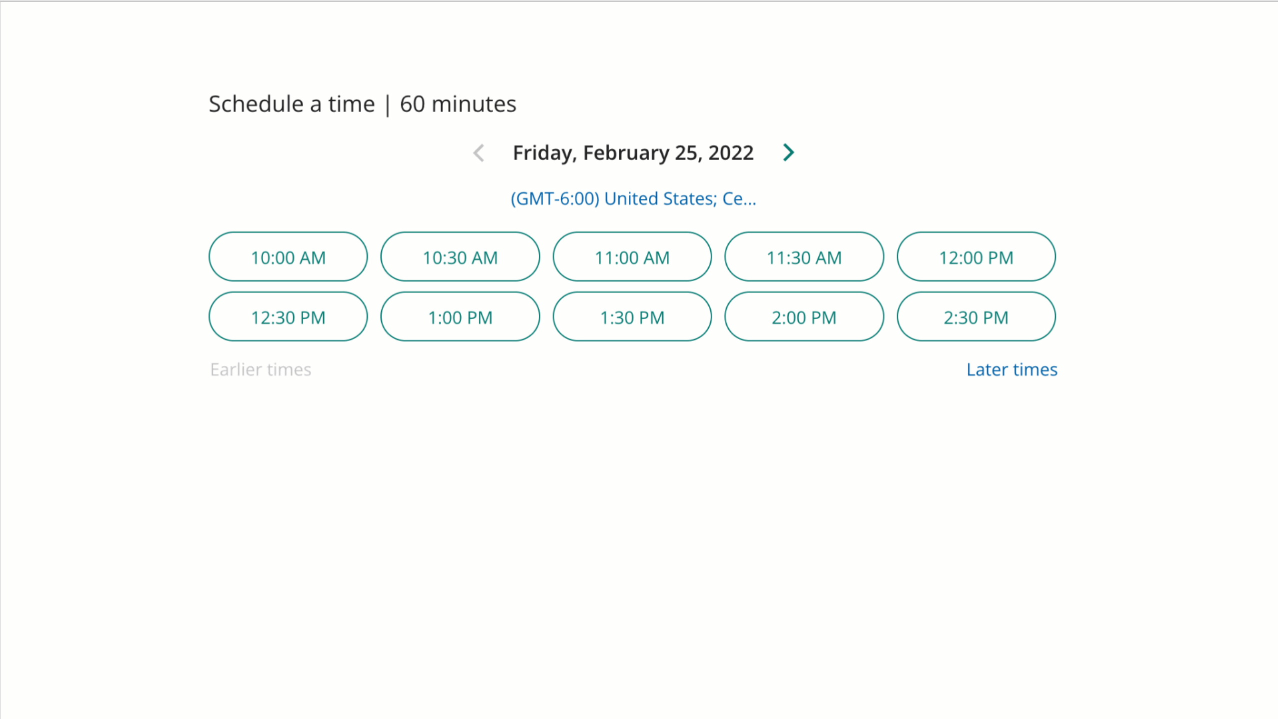


Figure 1: Offer scheduling within the form

What's required?

Licensing

To offer scheduling, any team members who will receive bookings need a user license for scheduled meetings. Learn more

Visitor data

At minimum, you need the visitor's **name** (first and last) and **email** to schedule with them. If you haven't already asked for their name and email on the form, this will be the first thing asked when they start to schedule.

Configuration

Event types

You can create one or more Event types, based on the meeting type(s) you'll offer your visitors. For instance, you can create an Event type called **Demo** to offer a 30-minute demo.

To create or edit an Event type, go to **Booking pages** on the left → **Event types** panel.

Learn more about creating an Event type

Booking pages

Each person receiving bookings will need their own Booking page. You can define their availability for meetings, configure how they'll meet with the visitor (through video session, by phone, in person, etc.), and more, specific to that person's requirements.

To create or edit a Booking page, go to **Booking pages** on the left **→ Booking pages** panel.

Learn more about creating a Booking page

Resource pools

To define who receives the booking, you can either specify a team, using a Resource pool, or an individual.

With a Resource pool, you can select multiple Booking pages owned by any qualified team members who can take the booking.

For instance, you can create a Sales Engineer resource pool and assign all bookings using either round robin or the pooled availability algorithm to distribute bookings evenly.

- With **Round robin assignment**, bookings will be assigned to the next team member in line. Visitors will only see the availability of the designated team member. This ensures an equal and fair distribution among the members of your pool.
- With **Pooled availability**, your entire team's availability will be combined into a single booking calendar. When a Customer selects a time, the booking is automatically assigned to the team member with the longest idle time, meaning the Team member who has not received a booking in the longest time. Pooled availability allows you to provide maximum availability to your visitors.
- With **Pooled availability with priority**, your entire team's availability will be combined into a single booking calendar. When visitors select a time, the booking is automatically assigned to the available team member with the highest priority. This allows you to provide maximum availability to customers, while ensuring the most qualified team member conducts your meetings.

To create or edit a Resource pool:

1. Go to **Booking pages** on the left.
2. On the left, select **Resource pools**.

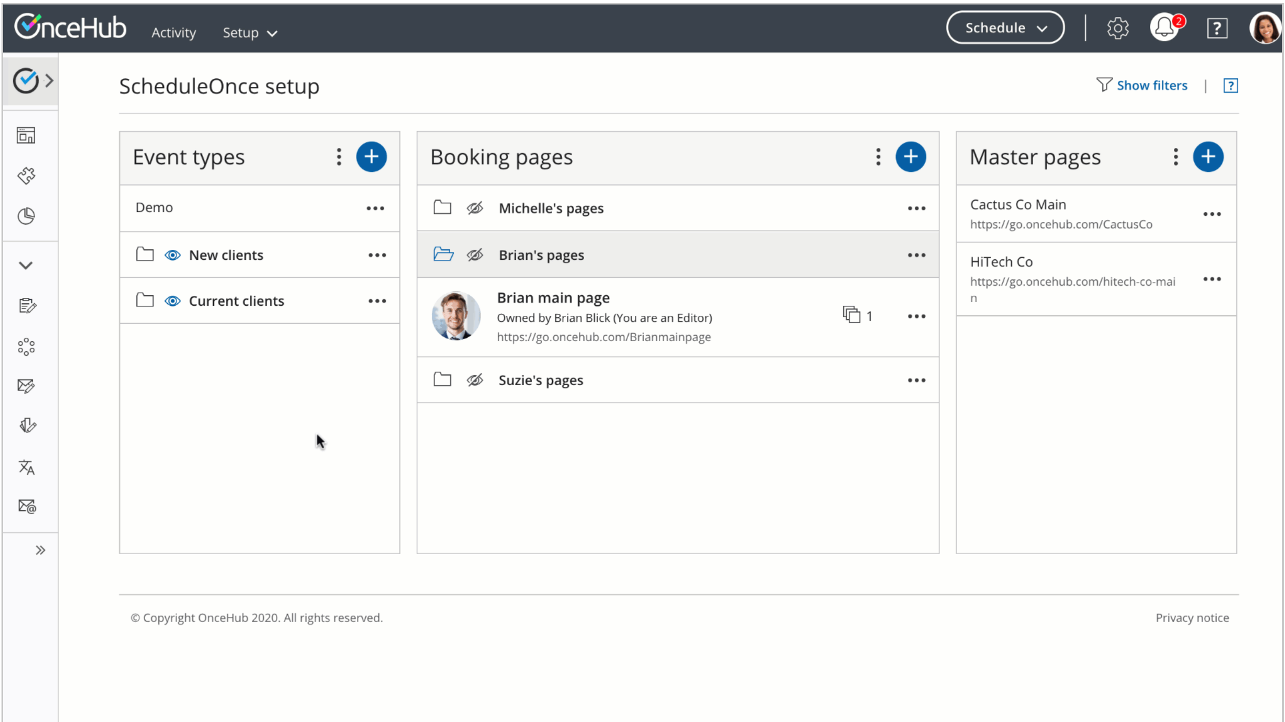


Figure 2: Navigate to Resource pools.

Schedule action in routing forms

Once you've configured the right Booking page(s), Event type(s), and Resource pool(s), you can add the Schedule action to your form.

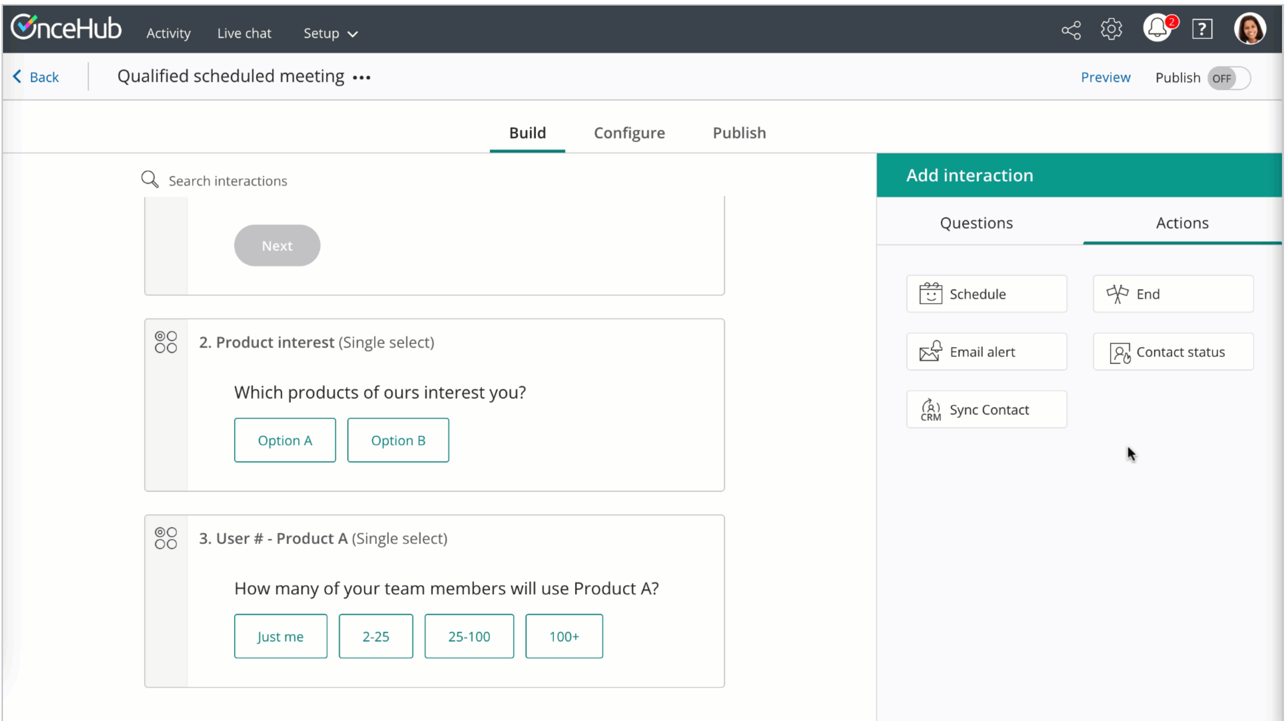


Figure 3: Add the Schedule action to your form

You'll select the correct **Event type** and **Booking owner** for that meeting. For the Booking owner step, you'll either select a Resource pool to book using a team or a specific Booking page to book with an individual.

If more than one team member from your organization should join the meeting, you can select them or the relevant Resource pool with the optional **Additional team members** field.

Chat live with your routing form visitors

If you want your high-quality leads to get in touch with you as soon as possible, live chat can provide the experience your visitors desire while reducing your time to engagement.

Once you qualify visitors through your form conversation, you can choose the right time to offer live chat to them. This way, people who meet your qualification criteria can engage with you immediately and move to the next level in your funnel.

Add the live chat action to your routing form

While you build your form, you can choose the right moment to route qualified visitors to a live chat conversation.

Add the **Live chat action** to your form.

Configure settings

Hand-off message: After they confirm they'd like to switch over to live chat, this message lets them know you're connecting them to someone on your team.

Timeout settings: Set a timeout period. After the amount of seconds defined, it will show the visitor a timeout message, explaining someone on your team isn't available.

Advanced settings: If you'd like to gather the visitor's name and email before connecting them to a live chat, you can configure the messages they see requesting these details.

Assign live chat conversations to your team

Any Users in your account with a live chat license can accept live chats. Once they toggle **Accept chats** to ON status, OnceHub shows them any live chats that come in through your website.

We recommend all your team members allow browser notifications so they will be sure to see all incoming chats.

Until one User accepts a conversation, it is open for any User currently indicated as available through the availability toggle. Once they accept the conversation, it will no longer be available to others in your account.

During the conversation, they will be able to interact with the visitor and also offer scheduling to them, if they've qualified the conversation further and decided a scheduled meeting could help clarify things further or move the visitor to the next step in your process.

If no team member accepts a chat by the defined timeout period, that chat will disappear from the live chat inbox. The visitor will see your configured timeout message. So your team can take further action, the contact and their conversation can be accessed from the Activity stream.

Notifications for live chat

You will be alerted to live chat requests in the following manners:

Red dot: A red dot will appear next to Live chat in the top navigation bar.

Ringing: You will hear an in-app ringing notification. As long as you've got the OnceHub app open, you will hear the ringing, no matter which tab you're on or if your browser is minimized.

Browser notifications: If you click on Allow browser notifications in the banner at the top of your screen, you will receive pop-up browser notifications for live chat requests. These notifications will appear as long as your OnceHub app is open, even if your browser is minimized.

Team chat app notifications: Set up team chat app notifications to receive notifications on those platforms. This will help you to not miss live chat requests.

You will receive notifications on your chat app whether you have the OnceHub app open or closed. When you receive a notification, the basic details of the visitor will be included in the notification, as well as a link that will navigate you to the app where you can accept the live chat (within the given timeout period you've set).

You need to set up the notifications each time you create a form. Add the Live chat interaction. Include the Webhook URL in the Webhook notifications bar.

We support the following chat apps:

- Slack
- Google Chat
- Microsoft Teams

Ending chat

A team member can end the chat at any point, once they determine the conversation is ready to be resolved.

Please note that if the visitor is idle for ten minutes, the chat ends automatically. You can view the conversation in the Activity stream.

Receiving routing forms notifications

As you build your form, you may add questions or other interactions that are significant to someone on your team. For instance, the visitor reached a certain part of the form or answered a question with a specific answer that indicates they're qualified for further sales action on your end, even if they don't book with you during the form or complete all the questions.

You can add internal email notifications at any point in the form, so the right people stay updated on your new lead and their engagement with you. The **email alert action** is 100% internal to your team. Your visitors will not see this interaction on their end and they will not receive any notifications from it.

1. Identify which interactions need an email notification.

This may be a critical qualification interaction, such as team size or a specific product they're interested in learning more about.

2. On the Routing tab, create routing logic to that email alert

For each relevant interaction, you can add a rule that routes the form to the email alert action. For instance, you can send an email whenever a visitor reaches that interaction in the form, or you can send it only if they answer a certain way.

Either route to an already-existing email action or you can create a new one from the routing tab (**Then route to +Create new interaction**).

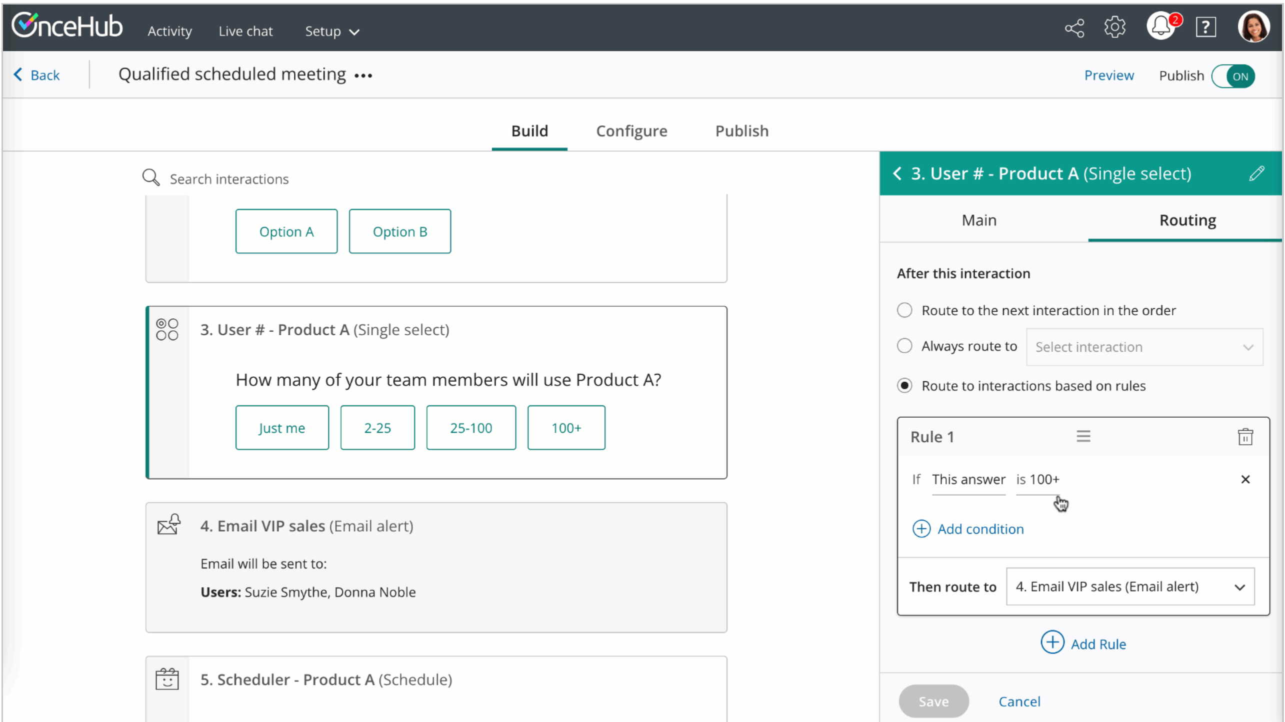


Figure 1: Route to the email action

3. Creating the email alert action

As mentioned, you can either create this action from the routing tab on the previous step or create a new one by dragging an Email alert action into the form.

Fill out the relevant fields you'll see in the email sent to the chosen recipients.

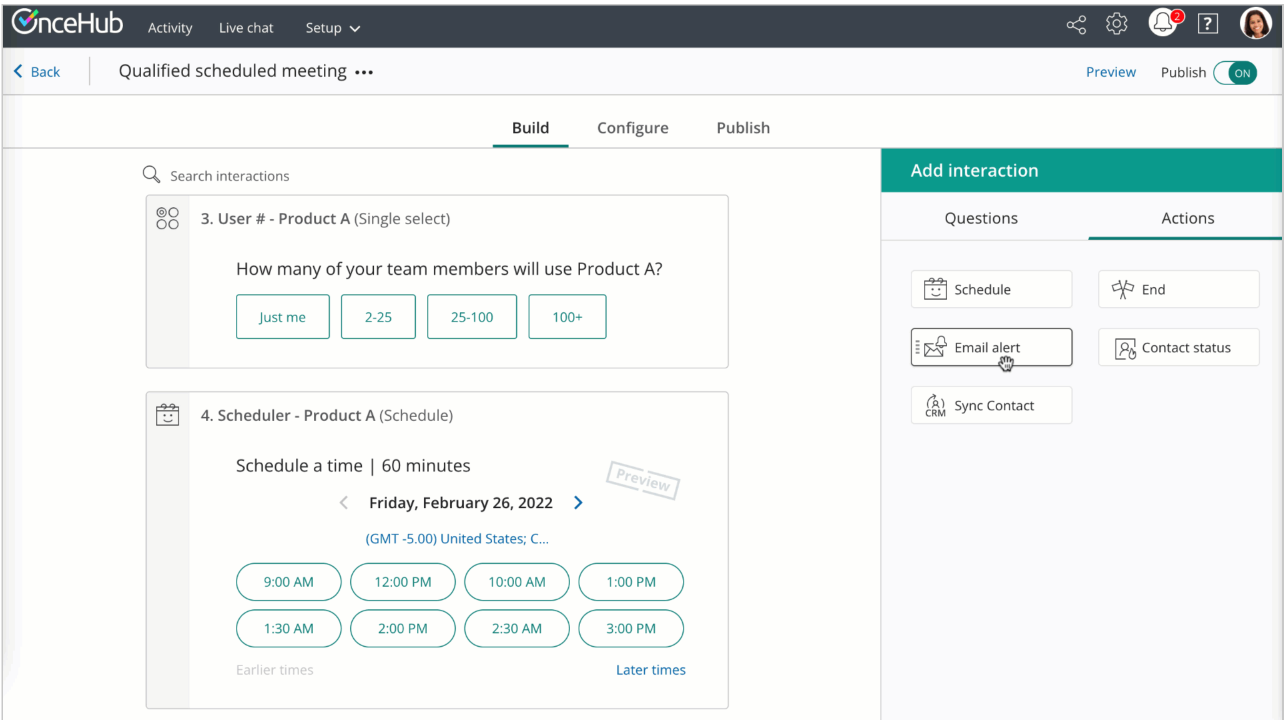


Figure 2: Add a new Email alert action. Be sure you route to the next step on the Routing tab so the visitor has a seamless experience.

Sharing your routing form

Last Modified on Jul 19, 2024

Once you've finished creating your routing form, you can easily share it with your customers by following the directions below. You can share your routing form in two main ways: through a link, or by embedding it on your website.

> **Note:**
>
> Your routing form needs to be published before you can share it. To publish, go into the builder, and click the **Publish** toggle at the top right-hand corner.

Share a link to your routing form

You can share your routing form directly to a customer with a link. It will be displayed on a page which you can customize to match your branding.

To design your page and generate a link, follow these steps:

1. In the routing form builder, click the **Share a link** tab.
    - You can also share from the lobby. Click the **Share** button next to the routing form you want to share, then follow the instructions from point 4 below. If you click **Design your page**, follow the points below from step 2.
2. A page displaying a preview of your routing form will load, with a toolbar on the right allowing you to customize the title, colors, and other features of the page. Here, you can:
    - Choose the layout you prefer
    - Choose a color gradient, or upload an image as the background
    - Choose the color of the buttons on the page
    - Add an image such as a logo or profile picture
    - Write heading and body text
    - Add text to be displayed in a footer, such as a disclaimer
3. Once you are happy with the customizations you have made, click **Save** and then **Share your page**.
4. In the pop up that opens (Figure 2) you can:
    - Add UTMs to the link
    - Download the link as a QR code as opposed to a URL
5. Once you are happy with the URL settings, click **Copy & close** to copy the link, and paste it wherever you would like the share the link.

Embed your routing form in a website

You can embed your routing form in your website, providing an easy way for customers to book with you on your own page.

Website embedding is available to both types of OnceHub users, although member users can only embed routing forms of which they are the sole host, whereas admins can embed any routing form on their account.

Your routing form's color palette is customizable, meaning that the color of the buttons and background of your routing form can be changed to fit the theme of your website.

To share your routing form by embedding it into a website, follow these steps:

1. Open the routing form which you would like to share.
    - You can also share from the lobby. Click the **Share** button next to the routing form you want to share, then on **Embed on website**, and follow the instructions below.
2. From the top menu, click the **Embed on website** button.
3. Select the color you'd like the routing form's theme to be, and then click **Get the code**.
4. Paste the code into the relevant section on your website.

You're all set! Your routing form will now appear on your website according to the settings you have chosen.

Send a link to a form

Last Modified on Jul 21, 2024

You can build a routing form in a few minutes and share it with a link. These links work great as campaign landing pages and there's no need to update your website.

Simply create a new routing form, customize the sharing settings, and copy the link.

1. In the lefthand menu, click **Routing forms**.
2. Create the form as you prefer, either from scratch or using a template. If an existing form is close to what you're wanting, you can duplicate that one instead by clicking the three-dot menu by that bot and selecting **Duplicate**.
3. When you've added the interactions you want and routed them, you can design the form as you like on the **Configure** tab.
   - You can define:
     - Header logo
     - Background color
     - Background image
4. Once you've designed the routing form to your organization's preferences, go to the Share a link tab. You can customize the layout, background, logo, and more.
5. Click **Share your page** and copy the URL.
   - If you want to use UTM parameters, click the relevant checkbox.

That's it! Send this link to whomever you wish, or use it in an ad or email campaign.

Update contacts with your CRM

Last Modified on Sep 9, 2024

You can update contacts and bookings from chatbots and forms to your CRM.

> **Note:**
>
> This integration currently supports updating contacts to Salesforce and HubSpot.
>
> Our integration from chatbots and forms to Salesforce is a separate connection than our integration from booking pages to Salesforce. If you'd like to update both, you can connect both integrations.
>
> If you use a different CRM than Salesforce or HubSpot, you may be able to update contacts to your CRM with our Zapier integration instead.

Stay on top of the sales cycle

If you engage with leads through chatbots or forms, you can track those visitors by creating and updating records in your CRM. Whether they book an appointment with you or simply engage with a chatbot, you'll keep significant interactions visible on your end, with nothing slipping through the cracks. With all relevant contacts updated to your CRM, you'll be able to gather and accelerate more leads for your organization.

You can choose to update all leads or only qualified leads, based on their level of engagement or specific answers they provide during the interaction. When the contact updates, your CRM fields will update with relevant data gathered during their chatbot or forms interactions.

Update from chatbots or forms to your CRM

Our integration connects to lead objects, contact objects, and events in your CRM.

Contacts update based on the email they provide during an interaction (chatbot or form conversation, or previous bookings). Once you've collected their email, this will either create a new record or, if your Salesforce account recognizes the contact's email, update the current lead or contact record.

1. Click on the **Account** menu (the gear icon in the bottom left corner).
2. On the **CRM** page **→ Chatbots and Forms CRM integrations**, find **Salesforce** or **HubSpot** and click **Start**.
3. Follow the directions to connect your Salesforce or HubSpot account to OnceHub.
4. Map the fields you wish to update according to your organization's needs. Each drop-down menu included on this step displays all the relevant OnceHub fields you can map to the relevant Salesforce field. See details below.
    - Note that this step is optional, as all required fields will already be mapped.
5. Any bookings made or new contacts added during the scheduling process will be automatically updated to your CRM.

Adding contact statuses to help with filtering leads in your CRM

While all contacts created through chatbots and routing forms are automatically updated in your CRM, you can enhance lead filtering by adding a status during the interaction. This gives you more flexibility when sorting leads in your CRM.

Using the **Contact status** action, you can assign a label to contacts during their interaction with a chatbot or routing form. These labels will be passed to your CRM, allowing you to filter leads based on their status.

To add the Contact status action:

1. Open the chatbot or routing form you want to edit.
2. In the "Add Interaction" panel on the right, scroll down to **Contact status** and add it to your chatbot or routing form.
3. Add an internal label, then select the desired status from the **Update status to:** drop-down menu. This status will be applied to visitors who reach this interaction point.

Visitors won't see this interaction as they use the chatbot or routing form; it operates in the background. You can use it in various ways, adding it at different points in the chatbot or routing form, depending on how you want to categorize visitors:

- If added directly after the welcome message, any visitor engaging with the chatbot or routing form will be updated in the CRM with the assigned status. This can be useful if you're getting new contacts from a chatbot or form that you don't want to include in your CRM.
- If you only want to label specific visitors, such as qualified leads, you can add the **Contact status** action as part of the step leading to a scheduling action.

Filtering with your CRM:

Once you have added Contact status in your chatbot or routing form, you can use filtering tools in your CRM to identify and sort leads from OnceHub based on their contact status.

Mapping fields

Note:

Once you map your fields, your CRM configuration will be set. If you'd like to update the mapping again, you should disconnect, reconnect, and redo mapping for the integration.

The minimum requirement for updating to your CRM is a captured email address. Depending on your CRM, the email will create or update a lead and/or contact record.

If you have other mandatory fields in your CRM and you do not map a OnceHub field to it, that field will stay blank in your CRM.

Mapping to Salesforce

Action	Salesforce
Create new leads	When a lead does not exist based on the provided email, map to these fields.

Update existing leads	When a lead exists based on the provided email, map to these fields.
Update existing contacts	When a contact exists based on the provided email, map to these fields. Only displays if you have custom contact fields in Salesforce.
Create new events	When an event does not exist because this is a new booking, map to these fields. For **Cancel/reschedule reason**, select **Cancel Reschedule Information Reason**. For **Event status**, select **Status**.
Update existing events	When an event exists based on the relevant booking, map to these fields. For **Cancel/reschedule reason**, select **Cancel Reschedule Information Reason**. For **Event status**, select **Status**.

Mapping to Hubspot

Action	Hubspot
Create new contacts	When a contact does not exist based on the provided email, map to these fields.
Update existing contact	When a contact exists based on the provided email, map to these fields.

Field type compatibility

OnceHub contact field type	Salesforce field type	Hubspot field type
Text (long)	Text, Text Area	Multi-line text
Text (short)	Text, Text Area	Single-line text

Number	Number, Text	Number
Date	Date, Text	Date picker
Time	Time, Text	Date picker
DateTime	Date/Time, Text	Date picker
Phone number	Phone, Text	Phone number
Picklist (single)	Picklist (single) (the value must exist in the field's value set), Text	Single-line text
Picklist (multi)	Picklist (multi) (the values must exist in the field's value set), Text	Multiple checkboxes, Single-line text
Email	Email	Single-line text
True/False	Checkbox, Single-line text, Picklist with True/False values	Single checkbox

Contact ownership

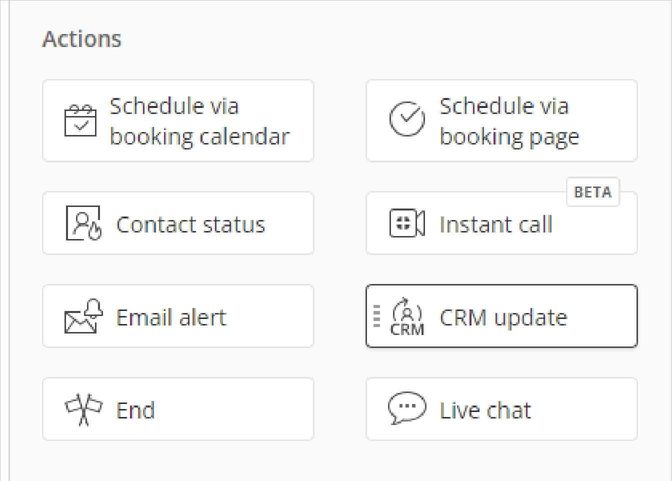
New contacts or leads are assigned ownership automatically, based on the user email of the contact owner in OnceHub. Note that the email **must** be the same as your CRM account email (**cannot** be an alias email).

For any existing contacts and leads, our integration keeps the current owner in your CRM as-is, with no changes to ownership.

If your OnceHub user email is different than your CRM account (**cannot** be an alias email), your CRM admin can assign ownership manually.

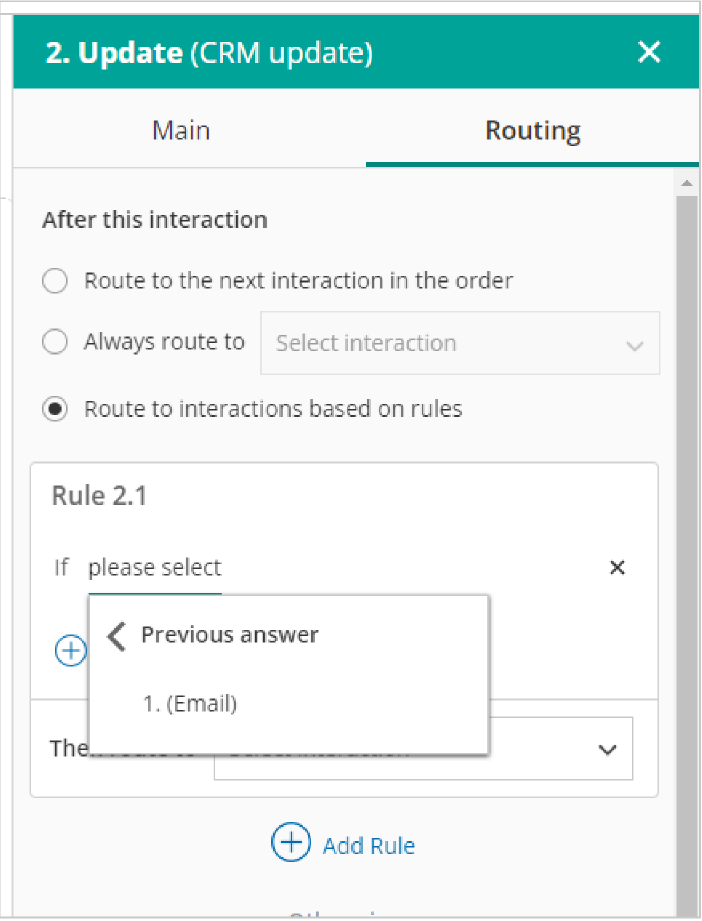
Add CRM update to your bots and forms

Any of your bot conversations can receive contact information and update that data to your CRM. If you'd like to update all contacts who have provided an email, add the CRM update interaction immediately after the Email question.



Add a CRM update interaction

If you don't want to update all contact interactions to your CRM, you can add the CRM update interaction after the specific interaction that qualifies them. For instance, you may want to route to the CRM update interaction only when visitors meet a certain threshold, qualifying them as a high-value prospect.



Routing the CRM update interaction

You can then return to the CRM update interaction and route to the next relevant interaction for that type of prospect.

Adding routing forms to your Squarespace website

Last Modified on Aug 16, 2024

Adding a routing form to your Squarespace website is quick and easy.

> **Note:**
>
> Adding custom javascript requires a **Squarespace Business** or **Commerce** plan.

Add a routing form to your website

Create the routing form

1. Go to **Routing forms** on the left.
2. Click on the **Create routing form** button OR duplicate another form by clicking the three dots menu for that form and selecting **Duplicate**.

Create the form as you prefer, either duplicated from another, from scratch, or using a template.

When you've added the interactions you want, routed them, and designed the form as you like, navigate to the **Embed on website** tab.

Install the code

In OnceHub

You'll grab the code you need for Squarespace.

1. On the **Publish** tab, select **Get the code**.
2. Copy the code.

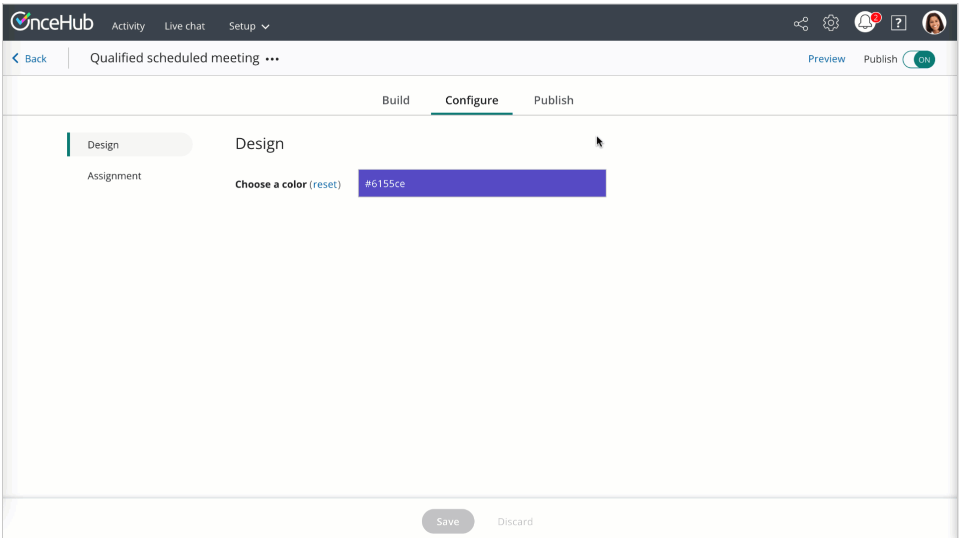


Figure 1: Copy the embed code

In Squarespace

You'll add a code block on your website, on each individual page where you want a form.

1. Edit your website.
2. Click to add content with a block.
3. In the **Basic** section, select **Code**.

4. The selected **Mode** should be HTML.
5. Paste the code from OnceHub and adjust as needed.
6. Save your website.

That's it! Your website can now display your routing form in the place you added it.

Adding routing forms to your Wix website

Last Modified on Aug 16, 2024

Adding a routing form to your Wix website is quick and easy.

Add a routing form to your website

Create the routing form

1. Go to **Routing forms** on the left.
2. Click on the **Create routing form** button OR duplicate another form by clicking the three dots menu for that form and selecting **Duplicate**.

Create the form as you prefer, either duplicated from another, from scratch, or using a template.

When you've added the interactions you want, routed them, and designed the form as you like, navigate to the **Embed on website** tab.

Install the code

In OnceHub

You'll grab the code you need for Wix.

1. On the **Publish** tab, select **Get the embed code**.
2. Copy the code.

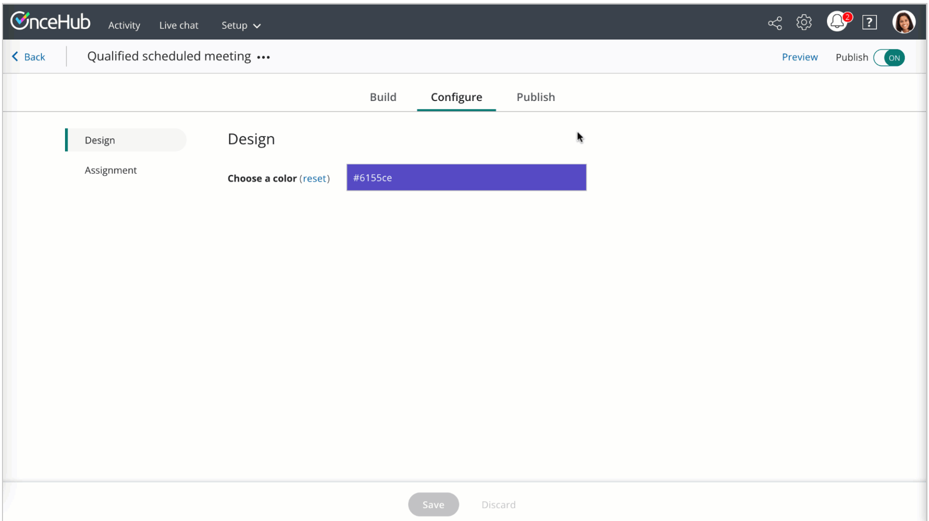


Figure 1: Copy the embed code

In Wix

You'll embed a widget on your website, on each individual page where you want a form. This creates an iframe on the page, where your form will appear.

1. Edit your website.
2. Click + to add the widget.
3. Go to **Embed → Embed a widget**.
4. Make sure the size of the widget is the right size on your page to hold the embedded form in it, as you want it displayed. This must be a large enough size to display any form interactions included on your form, including the schedule action if you intend to use it.
5. Paste the code from OnceHub and adjust as needed.
6. Save your website.

That's it! Your website can now display your routing form in the place you added it.

Adding routing forms to your WordPress site

Last Modified on Aug 16, 2024

Adding a routing form to your WordPress website is quick and easy.

Note:

If you are using Wordpress.com, you will need a Wordpress.com **Business** or **eCommerce** plan to use custom JavaScript and plugins.

If you are using a self-hosted WordPress site, you can install any plugins you like without purchasing a WordPress subscription.

Add a routing form to your website

Create the routing form

1. Go to **Routing forms** on the left.
2. Click on the **Create routing form** button OR duplicate another form by clicking the three dots menu for that form and selecting **Duplicate**.

Create the form as you prefer, either duplicated from another, from scratch, or using a template.

When you've added the interactions you want, routed them, and designed the form as you like, navigate to the **Embed on website** tab.

Install the code

In OnceHub

You'll grab the code you need for WordPress.

1. On the **Embed on website** tab, pick a color for your routing form, then select **Get the code**.
2. Copy the code.

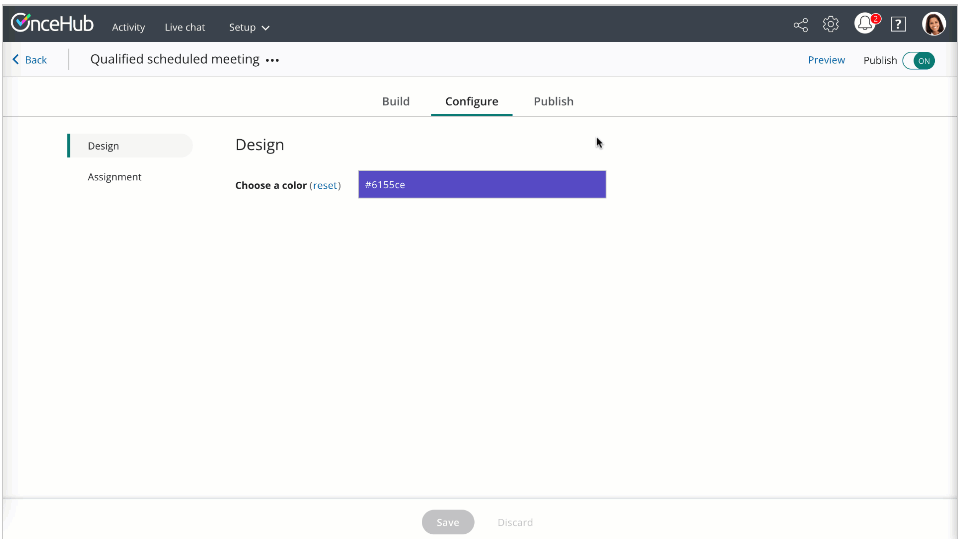


Figure 1: Copy the embed code

In WordPress

You'll add a custom embed plugin that allows you to add custom JavaScript to your pages. You'll add an embed on each individual page where you want a routing form.

1. Install and activate the custom JavaScript embed plugin of your choice. Learn more
2. Edit your website.
3. Add a custom embed wherever you'd like to add a form.
4. Paste the code from OnceHub and adjust as needed (for instance, the text for the link).
5. Save your website.

That's it! Your website can now display your form in the place you added it.

Adding routing forms to your ClickFunnels website

Last Modified on Aug 16, 2024

Adding a routing form to your ClickFunnels website is quick and easy.

Add a routing form to your website

Create the routing form

1. Go to **Routing forms** on the left.
2. Click on the **Create routing form** button OR duplicate another form by clicking the three dots menu for that form and selecting **Duplicate**.

Create the form as you prefer, either duplicated from another, from scratch, or using a template.

When you've added the interactions you want, routed them, and designed the form as you like, navigate to the **Embed on website** tab.

Install the code

In OnceHub

You'll grab the code you need for ClickFunnels.

1. On the **Embed on website** tab, pick a color for your routing form, then select **Get the code**.
2. Copy the code.

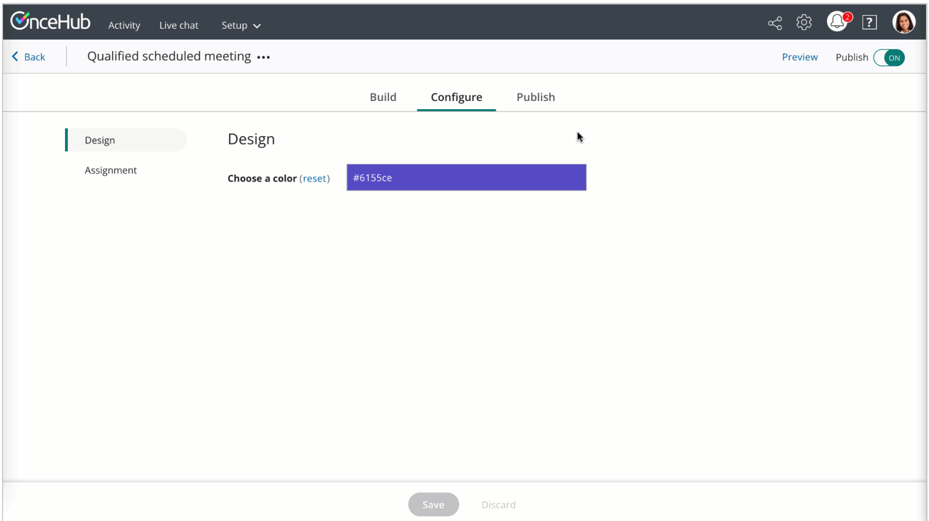


Figure 1: Copy the embed code

In a text app

On your computer, in a text app, paste the code and separate it into two parts.

For **Part 1**, include the second line of your pasted code:

```
<script id="fo-index" src="https://cdn.oncehub.com/fo/form.js" ></script>
```

For **Part 2**, include all the other lines of your pasted code (########## is your form's ID, supplied in the pasted code).

```
<!-- FormOnce embed START -->
<div data-fo-form="FORM-##########" style="width:100%;height:400px;"></div>
<!-- FormOnce embed END -->
```

In ClickFunnels

You'll add **Part 1** of the code from OnceHub to your header for each individual funnel page where you want a form.

For **Part 2** of the code from OnceHub, you'll add a custom JS/HTML element to that funnel page. This creates an iframe on the page, where your form will appear.

1. Edit your funnel page.
2. Go to **Settings → Tracking code → Header and/or Footer Tab**.
3. Add **Part 1** of the code from OnceHub to your header.
   - There may already be other code in your header, above or below where you add the OnceHub code. You can keep that code there or remove it as you prefer, depending on your preferences for keeping tracking codes for services like Google Analytics on that funnel page. Learn more
4. Go to **Elements → Add element**.
5. Scroll down to the **Misc Elements** category and select **Custom JS/HTML**.
6. Open the code editor and paste **Part 2** of the code from OnceHub. Adjust as needed (for instance, if you'd like a different height—so long as the height you choose is large enough to display any interaction on your form).
   - The **Custom code type** should be **Regular HTML/JS**.
7. Save your website.

That's it! Your website can now display your routing form in the place you added it.

Adding routing forms to your HubSpot website

Last Modified on Aug 16, 2024

Adding a routing form to your HubSpot website is quick and easy.

Note:

Adding custom JavaScript requires a HubSpot paid plan with access to website pages and custom modules.

Add a routing form to your website

Create the routing form

1. Go to **Routing forms** on the left.
2. Click on the **Create routing form** button OR duplicate another form by clicking the three dots menu for that form and selecting **Duplicate**.

Create the form as you prefer, either duplicated from another, from scratch, or using a template.

When you've added the interactions you want, routed them, and designed the form as you like, navigate to the **Embed on website** tab.

Install the code

In OnceHub

You'll grab the code you need for HubSpot.

1. On the **Embed on website** tab, pick a color for your routing form, then select **Get the code**.
2. Copy the code.

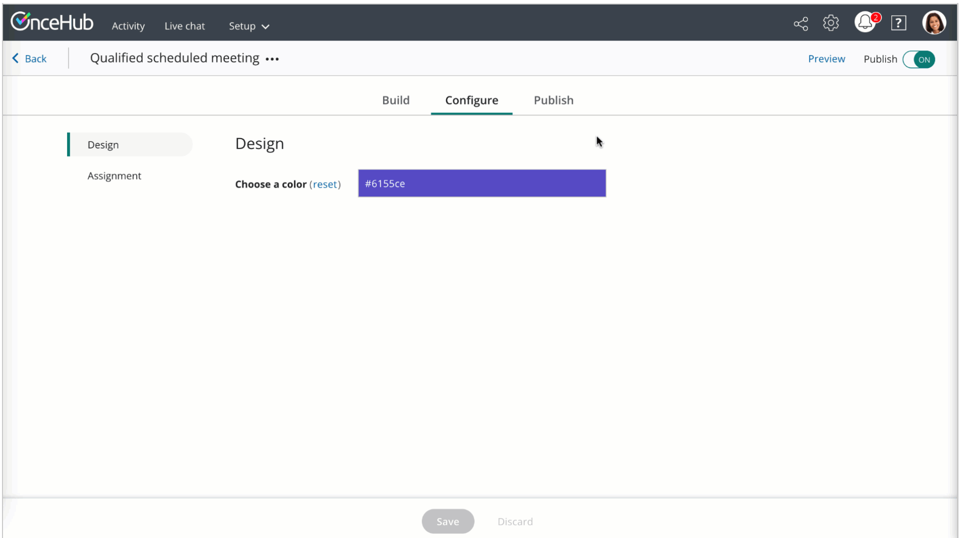


Figure 1: Copy the embed code

In HubSpot

To add custom JavaScript, you need to create a custom module with JavaScript required for loading. You'll add this module on each individual website page where you want a form.

1. Create a custom module that includes the OnceHub code.
2. Adjust the code as needed (for instance, the text for the link).

3. Make sure the module uses the **require_js** function. This will require the JavaScript to load for that module to work.
4. Add the custom module to your website page wherever you want it to display.
5. Save your website.

That's it! Your website can now display your routing form in the place you added it.

Adding routing forms to your GoDaddy website

Last Modified on Aug 16, 2024

Adding a routing form to your GoDaddy website is quick and easy.

> **Note:**
>
> Adding custom JavaScript requires a GoDaddy **Business** or **Commerce** plan.

Add a routing form to your website

Create the routing form

1. Go to **Routing forms** on the left.
2. Click on the **Create routing form** button OR duplicate another form by clicking the three dots menu for that form and selecting **Duplicate**.

Create the form as you prefer, either duplicated from another, from scratch, or using a template.

When you've added the interactions you want, routed them, and designed the form as you like, navigate to the **Embed on website** tab.

Install the code

In OnceHub

You'll grab the code you need for GoDaddy.

1. On the **Embed on website** tab, pick the color you'd like for your routing form, then select **Get the code**.
2. Copy the code.

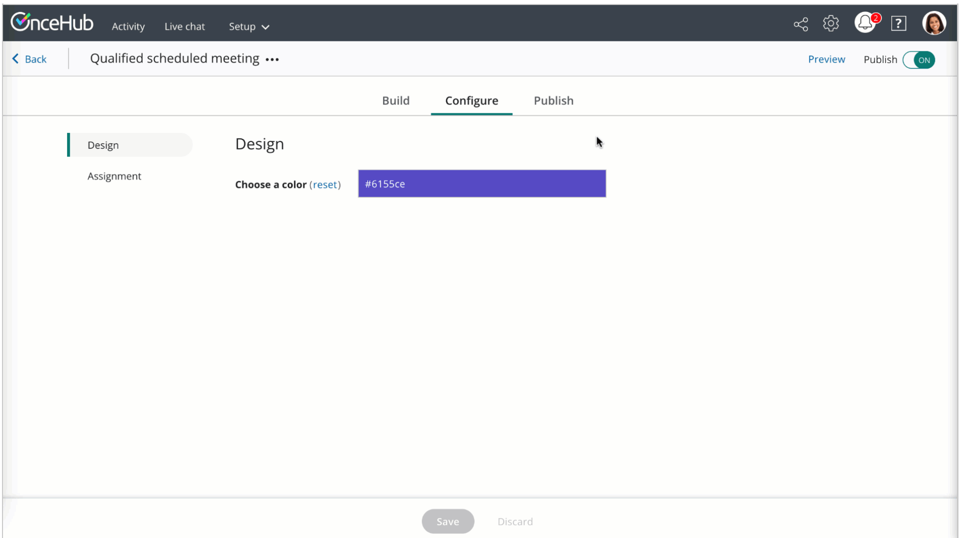


Figure 1: Copy the embed code

In GoDaddy

You'll add a custom code section to your website, on each individual page where you want a form. This creates an iframe on the page, where your form will appear.

1. Edit your website in the Website Builder.
2. In the place you want to add your pop-up bot link, add a custom code section.

3. Go to **Files & Web → HTML** and select **Add**.
4. Paste the code from OnceHub into the **Custom Code** field and adjust as needed.
5. Make sure the **Forced Height** field is high enough to display the form.
6. Save your website.

That's it! Your website can now display your routing form in the place you added it.

Adding routing forms to your Weebly website

Last Modified on Aug 16, 2024

Adding a routing form to your Weebly website is quick and easy.

Note:

Adding custom javascript requires a **Weebly** Professional or Performance plan.

Add a routing form to your website

Create the routing form

1. Go to **Routing forms** on the left.
2. Click on the **Create routing form** button OR duplicate another form by clicking the three dots menu for that form and selecting **Duplicate**.

Create the form as you prefer, either duplicated from another, from scratch, or using a template.

When you've added the interactions you want, routed them, and designed the form as you like, navigate to the **Embed on website** tab.

Install the code

In OnceHub

You'll grab the code you need for Weebly.

1. On the **Embed on website** tab, pick the color you'd like for your routing form, then select **Get the code**.
2. Copy the code.

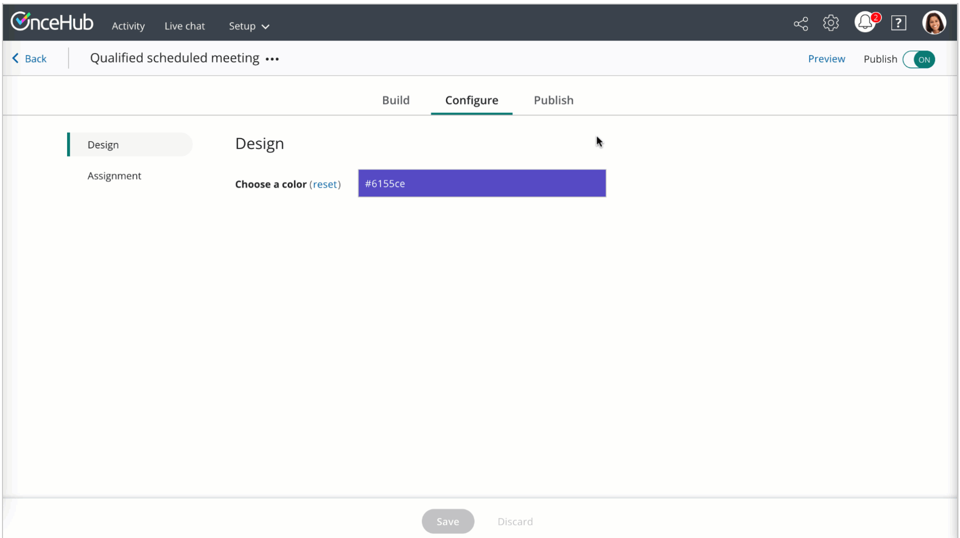


Figure 1: Copy the embed code

In Weebly

You'll add an **Embed Code** element to your website, on each individual page where you want a form.

1. Edit your website.
2. Add an **Embed code** element to the site.
3. Click on the element and **Edit Custom HTML**.

4. Paste the code from OnceHub and adjust as needed.
5. Publish your website.

That's it! Your website can now display your routing form in the place you added it.

Adding routing forms to your Unbounce landing page

Last Modified on Aug 16, 2024

Adding a routing form to your Unbounce landing page is quick and easy.

Note:

You can add custom javascript when working in the Classic Unbounce Builder only.

Add a routing form to your landing page

Create the routing form

1. Go to **Routing forms** on the left.
2. Click on the **Create routing form** button OR duplicate another form by clicking the three dots menu for that form and selecting **Duplicate**.

Create the form as you prefer, either duplicated from another, from scratch, or using a template.

When you've added the interactions you want, routed them, and designed the form as you like, navigate to the **Embed on website** tab.

Install the code

In OnceHub

You'll grab the code you need for Unbounce.

1. On the **Embed on website** tab, pick a color for your routing form, then click **Get the code**.
2. Copy the code.

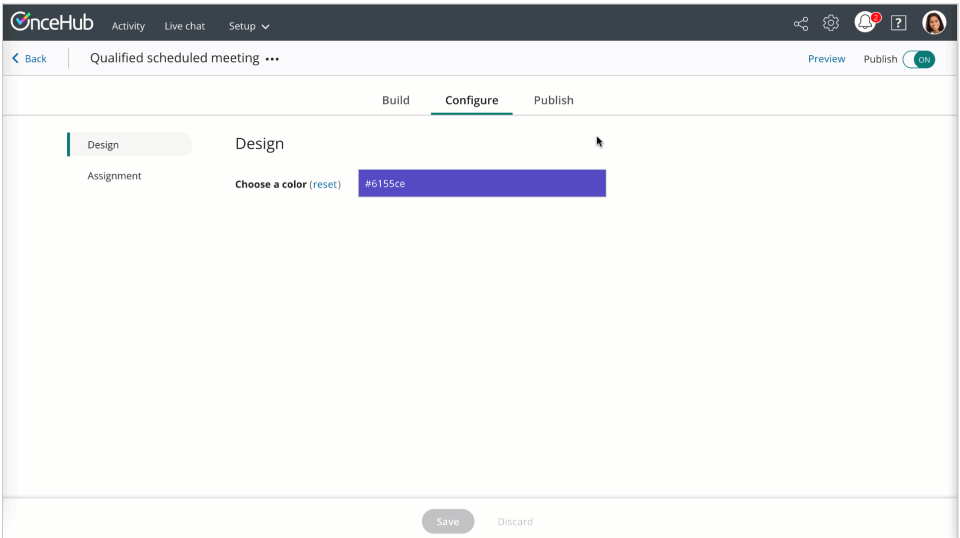


Figure 1: Copy the embed code

In Unbounce

In the Classic Builder, you'll use a custom HTML widget in each individual place where you want a form. This creates an iframe on the page, where your form will appear.

1. Edit your landing page.
2. Click to add a custom HTML widget.

3. In the **Embed Custom HTML Code** section, paste the code from OnceHub and adjust as needed.
4. Make sure the size of the widget is large enough on your page to hold the embedded form in it, as you want it displayed. This may require multiple attempts as you adjust and preview.
5. Save your page.

That's it! Your landing page can now display your routing form in the place you added it.

Adding routing forms to your Leadpages landing page

Last Modified on Aug 16, 2024

Adding a routing form to your Leadpages landing page is quick and easy.

Add a routing form to your landing page

Create the routing form

1. Go to **Routing forms** on the left.
2. Click on the **Create routing form** button OR duplicate another form by clicking the three dots menu for that form and selecting **Duplicate**.

Create the form as you prefer, either duplicated from another, from scratch, or using a template.

When you've added the interactions you want, routed them, and designed the form as you like, navigate to the **Embed on website** tab.

Install the code

In OnceHub

You'll grab the code you need for Leadpages.

1. On the **Embed on website** tab, pick a color for your routing form, then click **Get the code**.
2. Copy the code.

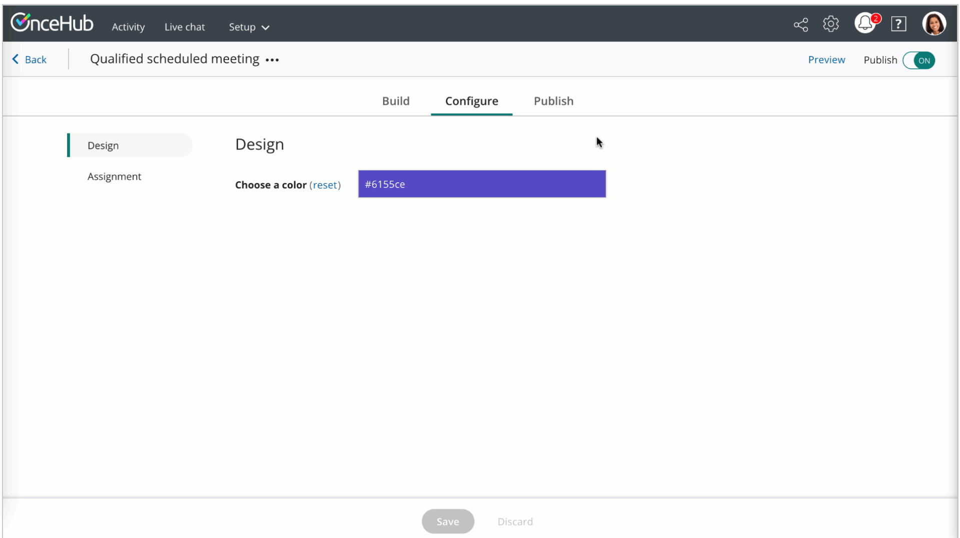


Figure 1: Copy the embed code

In Leadpages

You'll add an HTML widget on your landing page, in each place where you want a form. This creates an iframe on the page, where your form will appear.

1. Edit your landing page.
2. Click **Widgets** and drag the **HTML** widget onto your page. You may have to click **Show More** if HTML isn't listed. Learn more about the HTML widget
3. Paste the code from OnceHub and adjust as needed (for instance, the text for the link).
4. Save the widget.
5. Make sure the size of the widget is large enough on your page to hold the embedded form in it, as you want it displayed.

6. Publish/update your landing page.

That's it! Your landing page can now display your routing form in the place you added it.

Getting started with booking calendars

Last Modified on Dec 27, 2024

The booking calendar is a simple tool that handles complex scheduling requirements.

It displays your availability to customers, allowing clients and leads to book time with you.

The basic features of booking calendars are laid out for you here. For more a more detailed guide to setting up and sharing a booking calendar, check out these articles:

- The Booking settings tab
- The Booking form tab
- The Customer notifications tab
- The Share tab

Customizing your availability and meeting location

You may have already configured your availability during onboarding. If you're satisfied with the rules you set for your availability, you can skip this. However, read on if you want to change your availability settings at the profile level, or to customize availability and location for a specific booking calendar. You can adjust your **Weekly working hours** for recurring availability, like your average work week, or you can add **Date-specific overrides** that don't repeat themselves; useful if you're taking a week off, but don't want to de-activate your booking calendar.

You can adjust your availability settings by selecting the days in your working week, available hours or timeslots, different location options, and by overriding your recurring available hours for once-off engagements.

How can I use these features?

- **Set hybrid meeting locations**: Rather than having separate booking calendars, each with a different location, you can adjust your single booking calendar to offer multiple locations. You can set it to reflect the days in the week you work from the office and the days you're working from home.
  - Video conferencing: Offers your customer the option to meet with you through the video conferencing apps you have connected. For example, if you have connected to both Zoom and Google Meet, then these will be offered to your customers.
  - Phone: Allows you to call your customer on their phone number. If you offer this option, then the customer will be prompted to provide their phone number in the booking form, after selecting a meeting time. You will find the customer's phone number in booking notification email
  - Physical location: Offers your customer a physical location to meet. When you select this option, you will be prompted to pick an existing Location or add an address, which will be displayed to the customer when they are selecting a time with you.

    When adding an address, you can include Additional Information (optional) such as parking instructions or building access details. This information will be shared with guests in their booking confirmation.
- **Book time off**: By using a **Date-specific override**, you can block off a week for your summer holiday, but keep your booking calendar active to keep receiving bookings outside of that time.

- **Get specific**: We provide ways of getting very specific with how you can offer availability. You can customize your availability and location for individual days, and even have multiple time slots throughout a single day which you can customize.

Availability and meeting locations can be set on the profile level, or they can be customized for an individual booking calendar. Read on to see the difference:

Profile availability

Every user can set their own availability and meeting locations on a profile level, which OnceHub applies to all the booking calendars they own by default. When creating a booking calendar, you can select that its availability and meeting locations are taken from the host's profile settings. This is your standard availability and will usually reflect your normal working hours.

You can update this in your profile by clicking the profile picture in the top right-hand corner, and clicking **Scheduled meeting availability**.

Booking calendar-level availability

Alternatively, you can adjust the availability and meeting locations of a specific booking calendar. These settings take precedence over your profile-level availability. This option is useful if you have a type of meeting that is different to your general availability. For example, you have a VIP client who works in a different time zone to you. You're happy to extend your hours for them, but don't want to allow customers in your time zone to meet with you outside of your regular working hours. You can create a booking calendar just for this client, and adjust your hours accordingly.

Customizing availability and meeting location for a single host

When creating a booking calendar, you are able to customize the hours of availability and location options displayed to your customer. If the booking calendar has a single host, you can choose between the following two options:

- Retrieve from user profile settings
- Customize availability and locations

If you select **Retrieve from user profile settings,** the booking calendar will show your customer the available hours and the video conferencing options available per the user's profile. To set your availability and meeting location for your profile, click on the profile picture in the top right-hand corner, and then **Scheduled meeting availability**. You can then follow the numbered steps below.

When you select **Customize availability and locations** you will be able to edit your recurring availability, or add a date-specific override for once-off availability and location changes. Changing settings here applies only to the specific booking calendar you are working on, and allows you to override location and availability settings as set in your user profile settings. You can extend your hours of availability, or reduce them; you can also use it to add a location.

To customize your availability and meeting location, follow these steps:

1. Click between **Recurring availability** and **Date-specific overrides** to view the existing availability configuration.
    - **Recurring availability** means that changes you make to a day's availability and location will recur weekly.
    - **Date-specific overrides** are changes that only show for the specific day/s that you have set, and will not

repeat.

2. Click the **Edit** button to make changes to this configuration.
    - Under the heading **Working hours**, you can change the times you are available for scheduling.
    - Under the heading **Meeting location**, you can change the location you wish to display to a customer.
3. If you want to apply this configuration to other days of the week, hover over the **Copy to** button at the right of each day row, and then select each day you would like to apply these rules to, then click **Apply**.
4. If you want to add additional time slots for a day, click the plus button at the end of the day row. This will add an extra slot for you to customize. You can add as many additional slots as you need.
5. Click Apply to save your changes.

Customizing availability and meeting location for a team-hosted calendar

If the booking calendar is hosted by a team, you are given the following customization options:

- Retrieve from user profile settings
- Customize availability and locations
    - For **all** hosts
    - For **some** hosts

When you select **Retrieve from user profile settings,** the booking calendar will show your customer the available hours and video conferencing options available per the user's profile.

You are also given the option to edit the availability for an entire team, or just for members of the team. Adjusting availability and location for all users would be useful if, for example, you had a team that catered to in-person meetings by default, rather than video conferencing. Using that option, you could add a physical or phone location for the entire team.

Adjusting ability for some users would be useful if, for example, two members of your team were on leave for the week. You want to block their availability for the duration, so that no meetings are mistakenly made with them, but keep the booking calendar active for the rest of the team.

Once you have selected whether you would like to add custom settings for all users or for some users, follow these steps to edit availability:

If you select some users, you will need to select the user whose availability and location settings you would like to customize before continuing.

1. Click between **Recurring availability** and **Date-specific overrides** to view the existing availability
2. Click the **Edit** button to make changes in the pop-up menu
    - Under the heading **Working hours**, you can change the times you are available for scheduling.
    - Under the heading **Meeting location**, you can change the location you wish to display to a customer.
3. If you want to apply this configuration to other days of the week, hover over the **Copy to** button at the right of each day row, and then select each day you would like to apply these rules to, then click **Apply**.
4. If you want to add additional time slots for a day, click the plus button at the end of the day row. This will add an extra slot for you to customize. You can add as many additional slots as you need.

5. Click **Apply** to save these changes.

The booking calendar lobby

To access the booking calendar lobby, click **Booking calendars** on the left side of the page (Figure 3).

Here, you can see and access all of your existing booking calendars, create new booking calendars, and delete them.

By clicking on the three-dot menu at the end of a booking calendar's row, you can edit, duplicate, rename and delete it.

> **Note:**
>
> If you delete a booking calendar, it will also be removed from any chatbot, routing form, or booking hub that it is used in. You can see where the booking calendar is featured by hovering over the **Used in** column in the booking calendar lobby.

You can use the search bar at the top of the lobby to search through your existing booking calendars by their name or by using the booking calendar's share link. You can filter the results by the owner of the booking calendar.

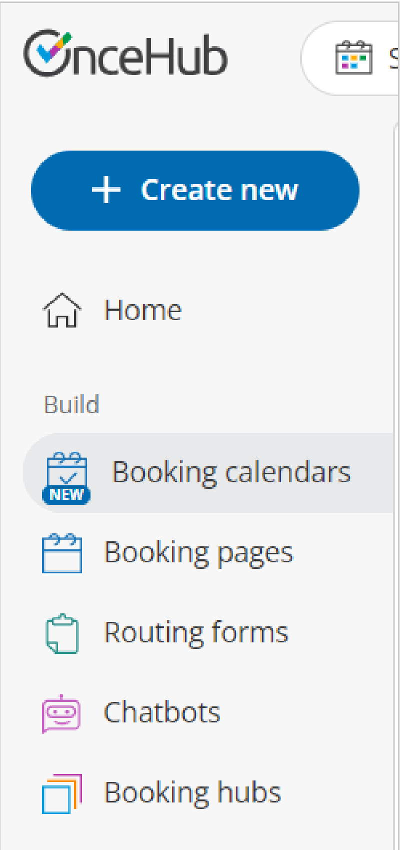


Figure 3: Accessing the booking calendars lobby

Create a new booking calendar

If you have no booking calendars yet, follow the directions below to create one.

1. First, click the **Booking calendar** icon on the left-hand side of any OnceHub page.
2. Click the **Create booking calendar** button in the middle of the booking calendars home page (Figure 4)
3. Enter the name you'd like to give the calendar, and click **Create**.
4. Fill in your booking settings, which are explained below.

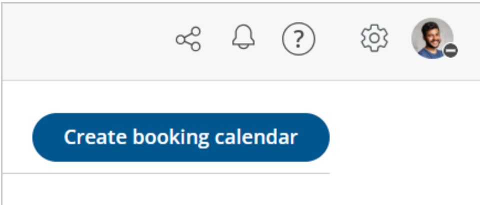


Figure 4: the Create booking calendar button

Settings

Meeting subject: This is the external name of your booking calendar, which your customer will see.

Meeting host: This is the host of the booking calendar. The host is the user who will receive bookings. There can be more than one host, as in a panel meeting, or you can choose for the meetings to be distributed among a team of the users in your account.

Duration: Choose the meeting's length from 15-60 minutes, or choose your own custom meeting duration.

Time slot spacing: Set the interval between available times. For example, 15-minute time slot increments may offer available times at 12:00, 12:15, 12:30, 12:45, etc.

Lead time: Set a custom time frame within which customers are unable schedule meetings with you. This is useful if, for example, you are offering a meeting which requires some time beforehand to prepare for.

Time frame limit: Set how far into the future your availability is shown to customers.

Buffer time: Set a buffer before the start and end of meetings. This is useful if you need time in between two meetings to prepare.

5. Once you're done, click **Save** to create your new booking calendar.

Reassigning the meeting host and rescheduling on behalf

Reassign the meeting host

Administrators can reassign the host of an upcoming meeting. If the host of an upcoming meeting is unavailable, a new host can be selected to take the meeting.

To reassign a meeting host, follow these steps:

1. On the activity stream, find the meeting in question
2. Beneath the title, click **Reassign**
3. A pop-up will open where you can select the new host of the meeting. Pick from the list, or click in the filter bar and type the name of the desired user.
    1. If the new host has multiple video conferencing option connected, including the original location, then you will be able to keep the same meeting location, or choose a new location from a list.
    OR
    2. If the new host's location settings differ from the original host (for example, if the original location is

physical, but the new host is only available to meet on Zoom) you will be able to choose to offer a Zoom call to the customer. or have no location details displayed at all.

4. Once you have completed the **Review and confirm** page, click **Reassign** to finalize your changes.
5. The meeting is now reassigned. Your customer will be informed of the changes.

Reschedule a booking on behalf of someone else

If you or your customer is unable to make the original booking time, you can reschedule the booking yourself on your customer's behalf. This can be done even if the original meeting time has already passed.

To reschedule a meeting, follow these steps:

1. Find the booking in question in the activity stream.
2. Click **Reschedule**
3. A pop-up will appear, allowing you to choose between rescheduling the meeting yourself, or asking your customer to reschedule. Both of these options cancel the original meeting.
4. On selecting either option, you will be prompted to provide a reason for the rescheduling which will be shared with your customer.
    1. Selecting **Reschedule on behalf of the customer** will direct you to the relevant calendar, and display availability for rescheduling the meeting.
    2. Selecting **Ask the customer** will provide them with the relevant calendar, and allow them to choose a new time for the meeting.
5. Once you have selected a new time, click **Reschedule.** The confirmation will be shared with your customer.

Note:

You can only reschedule a meeting if you are the host or owner of the meeting, or if you are an admin.

Using CAPTCHA with booking calendars

You can add an invisible CAPTCHA to your booking calendars, which will not be displayed to site visitors, except for bots and suspicious users.

Enabling CAPTCHA adds a strictly necessary cookie named **cf_chl_prog**. This cookie is created and used by Cloudflare to execute Javascript or CAPTCHA challenges, identifying trusted web traffic for your pages. It does not identify the person receiving the cookie on the web application, track them, or store their personal identification details in any way. It is never used beyond the scope of the CAPTCHA challenge.

As an account administrator, you can enable CAPTCHA doing the following:

1. Go to your account settings (the gear icon at the top right of the screen.)
2. Click **Security and compliance**.
3. On the left, click **CAPTCHA**.
4. Click the **Enable CAPTCHA** checkbox.

Done! Now all of your booking calendars will contain a hidden CAPTCHA, which repels bots and suspicious users before they can access booking information.

Booking calendar troubleshooting

Your booking calendar is not displaying available times

If your booking calendar is not displaying any available times, there could be a few reasons:

- The connection to your calendar has failed.
  - Troubleshooting Microsoft 365 calendar connection
  - Troubleshooting iCloud calendar connection
  - Troubleshooting Google calendar connection
  - Troubleshooting Microsoft Exchange calendar connection
- All host/s have been deleted. If the host of a booking calendar, or all members of a team hosting a booking calendar have been deleted, then your booking calendar will not display any available times to your customers.
- The host does not have a seat.
- You have not configured your availability correctly.

The Booking settings tab

Last Modified on Dec 12, 2024

Booking calendars allow you to cater for complex scheduling situations with simple settings.

Read on to learn more about the scheduling settings available in booking calendars.

Availability

You should have set up your availability during onboarding, but if you need to tweak your settings, you can learn how to do that in this article. Here, you can adjust your availability by selecting your work days, available hours or timeslots, and override your recurring available hours for once-off engagements.

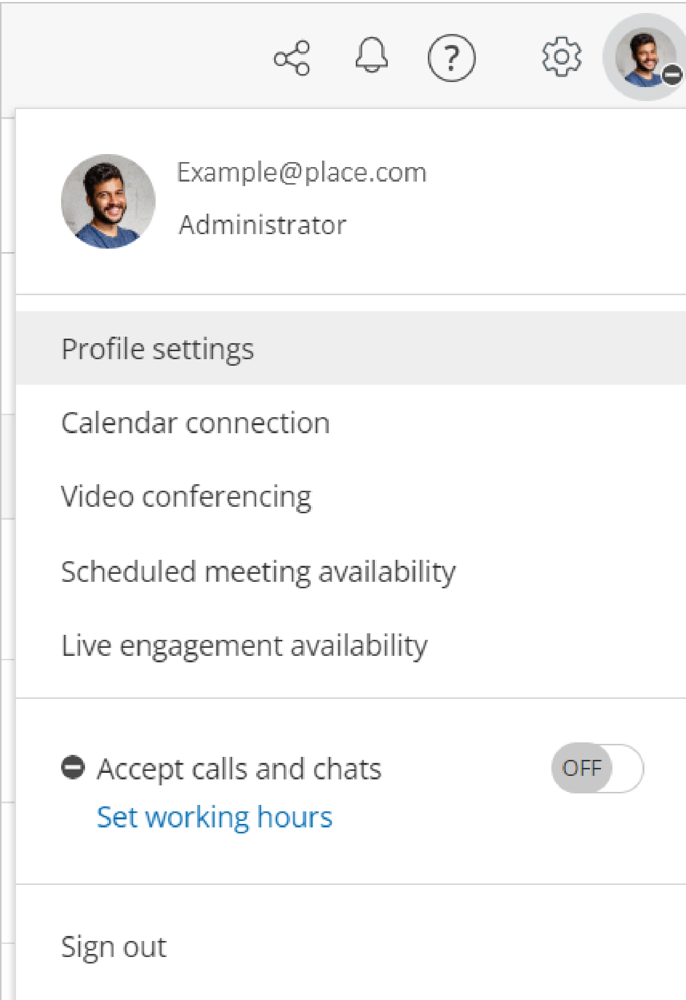


Figure 1: Profile settings

Read this article to learn in detail how to change your availability and location settings for a specific booking calenda or at the profile level.

Meeting subject and duration

The same meeting subject will be visible to you and your customer, so name your calendar something appropriate and relevant to the meeting. This is the only name that you and your customers will see, so be sure to clearly communicate the nature of the meetings scheduled by this calendar. (Figure 2)

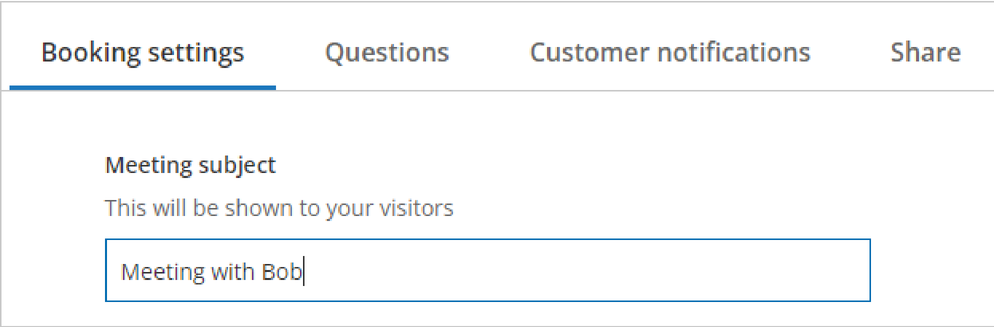


Figure 2: Naming your meeting subject

Duration

Choose the meeting's length from 15-60 minutes, or enter your own custom meeting duration. For additional time slot settings, click **Time slot settings** at the bottom of the screen.

Individual scheduling

To set an individual meeting host, select one user from the **Host and co-hosts** dropdown menu. This means that the user selected will be the sole owner of the meeting.

Scheduling with multiple users

There are two types of team-scheduled meetings: **Multiple host** and **distributed**, which are detailed below.

Multiple host meeting

This setup allows your customers are able to book a time to meet with multiple users simultaneously.

To create a meeting hosted by multiple users, also termed a panel meeting, you must select multiple hosts. Click on the **Host and co-hosts** dropdown menu, and select the team members you would like to have in the meeting, and click **Add** to add them. Note that only users with active licenses will have their availability displayed.

> **Note:**
>
> You can also select a team of users as opposed to individual users. Read on below to learn how to make a team!

Distributed meeting

This setup uses dynamic distribution to select a meeting host from a team of members.

In order to setup a distributed meeting, you will first need to make a team.

If you have already grouped users into a team, you can skip this part.

To make a team:

1. Click on the **Host and co-hosts** dropdown menu, then click on **Create new team**.
2. Give the team a name and select the Users you would like to be on the team.
3. Click on **Save** to finalize the creation of your new team.

> **Note:**

You can also set up a team at any time in the teams page by clicking on **Account** in the top right and then **Teams**.

Now that you have made a team, you can create a distributed meeting by selecting the team in the **Host and co-hosts** dropdown menu. At the top of the list, under the heading **Member from a team(s)**, select the option **A member of [your team name]**, then click **Add**. This will create bookings among any available members of that team, and offers a choice between two distribution methods. Click **Change** to choose between the distribution options which are described below.

- Using **any available team member** displays every user in the team's availability to the customer, and allows them to choose a time most convenient for themselves, maximizing the availability offered.
- Using **Round robin (equal distribution)** distributes bookings among your team with a priority that all members of the team will have equal opportunities for meetings. This prioritizes a fair distribution among your team, but can result in less availability being shown to visitors.

When using **Any available team member** for distribution, you can select **Manage** next to **Priority and workload** which will bring up a menu that allows you to select the priority of each team member. Increasing someone's priority level will mean that they will be selected over other potential hosts who have the same availability but lower priority.

Managing booking limits

You can set rules which manage the workload of a team or individual users by setting a limit to the amount of bookings that can be made with a user or a team.

To create or edit booking limits, you have to be in the booking calendar builder, on the **Booking settings** tab.

For meetings with an individual host

Follow these steps to manage booking limits in a booking calendar with an individual host:

1. Below an individual meeting host's name, click **Edit** below the host's name
2. Add a number to indicate the maximum amount of bookings they will be able to take, and then select whether that applies per day, week, or month
3. Click **Apply** to finalize the settings

For meetings hosted by a team

Follow these steps to manage booking limits in a booking calendar hosted by a team:

1. Click **Manage** next to **Priority and workload**, or just **Workload** if the meeting is distributed using round robin
2. On the pop-up, select the checkbox for the host whose availability you would like to edit.
    1. If you'd like to apply these limits to all members, select the checkboxes for each relevant member.
3. Add a number to indicate the maximum amount of bookings they will be able to take, and then select whether that applies per day, week, or month
4. Click **Apply** to finalize the settings

Time slot settings

There are five options for customizing the time slots of meetings.

- **Duration:** Choose the meeting's length from 15-60 minutes, or enter your own custom meeting duration.
- **Time slot spacing:** Sets the interval between available times. For example, 15-minute time slot increments may offer available times at 12:00, 12:15, 12:30, 12:45, etc. Choose between the default time slots, or add a custom time by clicking **Custom** at the bottom of the drop down menu, and adding your own value (Note: you can only space time slots in multiples of 5)
- **Lead time:** Set a custom time frame within which customers are unable to schedule meetings with you. This is useful if, for example, you are offering a meeting which requires some time beforehand to prepare for. Select the number and unit of time measurement from the dropdown menu to configure lead time.
- **Time frame limit:** Set how far into the future your availability is shown to customers. This is useful if you don't want customers to book meetings so far in advance that the meeting is forgotten about. Select the number and unit of time measurement to configure the time frame limit.
- **Buffer time:** Set a buffer before the start and end of meetings. This setting is useful if you need time in between two meetings. Select the number and unit of time measurement to configure the buffer time.

Once you're done configuring your settings, click **Save** to create your new booking calendar.

The Booking form tab

Last Modified on Sep 4, 2024

The **Booking form** tab allows you to set up your calendar to ask your customers questions after they have selected a time to book with you. The options available help you to gather basic information from your customers, which will be relayed to you in the meeting confirmation email.

The booking form will only be displayed to your visitors if your booking calendar is shared directly, such as when embedded on a website or shared with a link. The booking form won't be displayed when the booking calendar is used within a chatbot or routing form, because those tools allow you to add questions *before* offering a booking, which defines the experience and workflow as a customer schedules.

Note:

If you want to ask visitors screening questions before they select a date and time, use a routing form or a chatbot.

When configuring a booking calendar, the **Booking form** tab is located along the upper menu. (Figure 1)

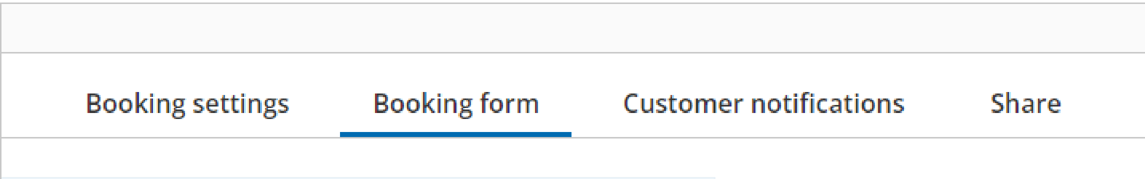


Figure 1: The location of the Booking form tab

Default fields

The default questions are the customer's full name and email address which are required to make the booking. In the sidebar of the booking form tab, you can add multiple types of questions to customize the information you gather from your customers.

To change the order of a field, click on the left side of the field, and drag and drop it.

You can't delete default fields.

Contact full name:

Although you can't remove this question or alter the contact field, you can edit the text that is shown to customers. To do this:

1. Click on the interaction, and in the column on the right, type in the box below the heading **Question text** to add your own text.
2. Click **Save** at the bottom of the column.

Contact email:

You can't remove this question or alter the contact field. You can edit the text of the question. To do this:

1. Click on the interaction, and in the column on the right, type in the box below the heading **Question text** to add your own text.

2. Click **Save** at the bottom of the column.

Adding additional guests:

When configuring the contact email field, you can allow your customers to add up to 10 additional guests. To do this:

1. Click on the **Contact email** interaction.
2. In the toolbar on the right, click the **Allow additional guests** toggle on.
3. This will display a field to your customer in which they can add additional email addresses. These addresses will be copied into the customer notification emails, and invited to the meeting.
4. Add text that will be displayed to your customer under the heading **Question text**.
5. Below, you can choose whether to save any additional email addresses the customer may add in the meeting only, or as a new contact profile.
6. Click **Save** at the bottom of the column when you're happy with your settings.

Conditional fields

Conditional fields are displayed by default based on the configuration of your booking calendar.

SMS notifications: If the user selects SMS within customer notification options, then the 'mobile number field' will be displayed to the customer after they select a date and time. A checkbox which asks the customer to consent to receiving SMS notifications will be displayed.

Location: This field displays the meeting location options available to the customer based on what you have provided. If you do not provide any location, or just one, then this field is not displayed. Meeting location can be set in the booking settings tab.

The location options are:

- **Video conferencing**: Displays the video conferencing options available to the customer. For example, if you have connected to both Zoom and Google Meet, then both options will be offered to your customers to choose between.
- **Physical location**: Displays the physical location options you have provided.
- **Phone**: Allows you to call your customer on their phone number. If you offer this option, then the customer will be prompted to provide their phone number in the booking form, after selecting a meeting time. You will find the customer's phone number in booking notification emails.

> **Note:**
>
> If the customer does not agree to receive SMS notifications, then they can still receive email notifications and reminders.

Additional booking form tab fields

The buttons to add these fields appear in the toolbar on the right when in the booking form tab. To add them to the booking form, drag the field button from the toolbar and drop it in the order you would like it to appear to your customer.

By clicking on an individual field, you can fill in the details, such as the question you want it to ask your customer, where the information will be saved, and whether you want to make it a required answer or not.

To change the order the fields appear in, click on the left side of the field, and drag and drop it.

To delete a field, hover over it and click the bin icon. If no bin icon appears, then this is a required field and can't be deleted.

Text question

These are questions to which the customer can reply with their own text.

Single select

A single select asks a question, and allows the customer to select one answer in response. You configure these questions and the answers when you add the interaction to the booking form.

The possible answers can be displayed either as a dropdown menu, or a list of buttons.

Multi select

A single select asks a question, and allows the customer to select multiple answers in response. You configure these questions and the answers when you add the interaction to the booking form.

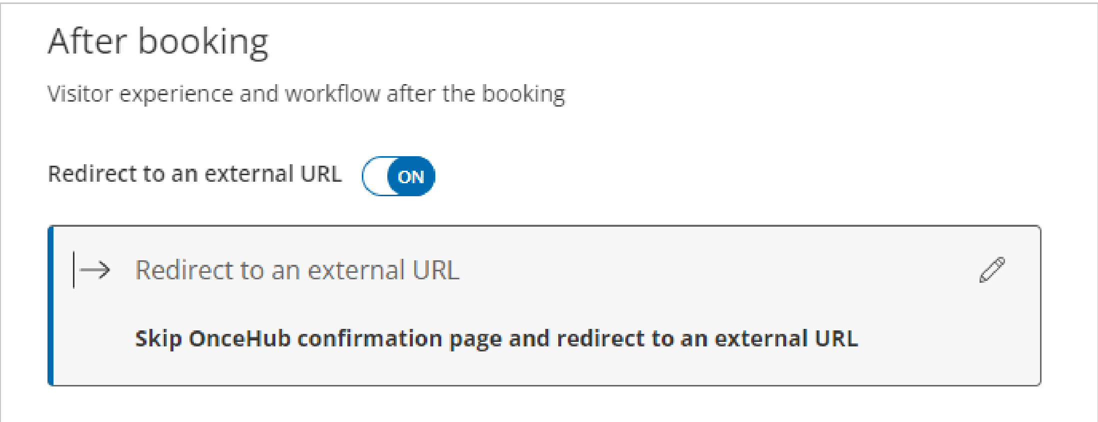
The possible answers can be displayed either as a dropdown menu, or a list of buttons.

Redirecting to an external URL

At the bottom of the booking form builder, you can turn on the option for customers to redirect to an external URL which you provide, once they have finished booking time with you, instead of the OnceHub confirmation page.

You could use this feature in the following ways:

1. Redirect the customer to a thank you/landing page or a payment page.
2. Measure the effectiveness of your marketing campaigns by adding tracking codes such as AdWords, Facebook pixel, or Google Analytics code to the redirect target page.
3. Offer customized content upon confirmation to ensure you can have the most productive meeting.
4. Redirect to a post-meeting survey or feedback form to gather insights and improve services.



When you turn it on, a toolbar will appear on the right which will allow you to add URLs to redirect the customer to after these events:

- After customer schedules
- After customer reschedules

- After customer cancels

Add the URL you would like to apply to each event, and click **Save** at the bottom of the toolbar to confirm these changes.

The Customer notifications tab

Last Modified on Aug 27, 2024

The customer notifications tab allows you to apply custom notification workflows to the booking calendars in your account. You can either use a standard (pre-set) workflow, or customize a new workflow. Read on to learn how to apply an existing workflow and how to create custom workflows from scratch.

These notification workflows also apply when a booking calendar is used as a scheduling action within a chatbot or routing form. When a meeting is scheduled using a booking calendar within a chatbot or routing form, the SMS or email notifications sent to the customer will be determined by the notification workflow that has been applied to the booking calendar.

Applying notification workflows to a booking calendar

Member users can apply existing workflows to their booking calendars if they have created the booking calendar and are the sole host. If they have been added to a booking calendar by an administrator, then they are not able to add a workflow to that booking calendar.

Administrators have no restrictions to applying workflows to booking calendars. Custom workflows can be created by administrators, which is explained here.

A workflow needs to be applied to a booking calendar in order for it to come into effect.

1. To begin, open the booking calendar you want to apply a notification workflow to.
2. At the top of the booking calendar builder, click on the **Customer notifications** tab.
3. From the drop-down menu, select the customer notification workflow that you want to apply to this booking calendar.
    - You will be able to see the settings of the selected workflow displayed below.
4. When you've selected the workflow you want, click **Save** at the bottom.

That's it! Now any customer that has scheduled a meeting through that booking calendar will receive a series of notifications according to the workflow that you have set.

Create a custom workflow

Administrators can create custom workflows by configuring notifications for the entire booking cycle. Member users cannot create or edit workflows under any circumstances.

> **Note:**
>
> Alternately, you can select the three dots next to the title of any existing workflow, which will allow you to duplicate the existing workflow. You can then edit the settings of the duplicated workflow.

Email, SMS notifications, and reminders can be triggered to be sent at these points:

- Meeting confirmed
- Meeting reminder
- Meeting rescheduled

- Meeting reassigned
- Meeting canceled

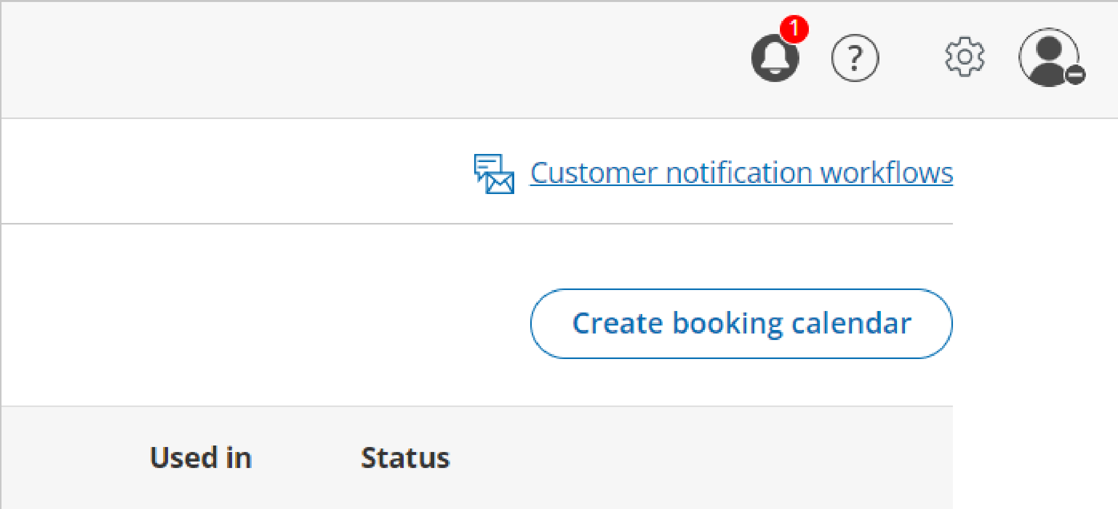


Figure 1: The ***Customer notification workflows*** *button*

Steps for creating a custom workflow

1. Go to the booking calendar builder.
2. Click the **Customer notification workflows** button (Figure 1).
3. Click **+ New custom workflow** (Figure 2).
4. Name the workflow in the pop-up and click **Create**
5. In each row, select whether to send an email, an SMS, or both at each point.
   - You can customize the notification emails. Read on below for a guide.
   - When you select **SMS notification**, a corresponding **SMS notification** interaction will be added to the booking calendar's booking form, directing customers to enter their phone number.
6. In the second row, **Meeting reminder**, you can choose how long before a meeting the reminder is sent. You can also add up to two additional reminders.
7. Once you're happy with the workflow, click **Save** at the bottom of the screen.

This new notification workflow can be applied to any of the booking calendars in your account.

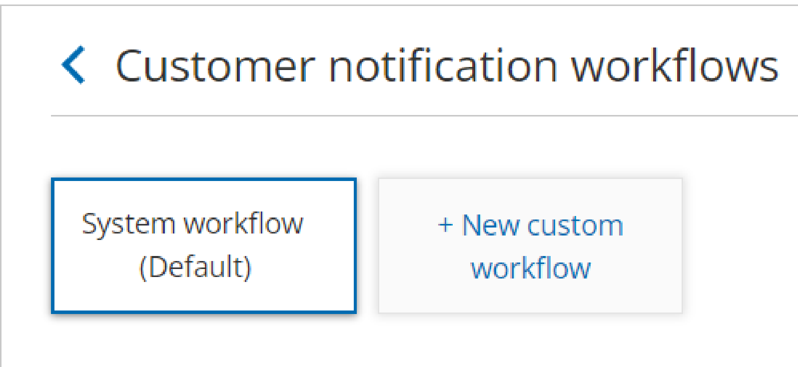


Figure 2: Choosing between a default or custom workflow

Customizing the notification emails

When a customer books a meeting through a booking calendar, with a notification workflow applied, you can customize the email that is sent out to them when the meeting is confirmed, rescheduled, canceled, reassigned, as well as custom reminders.

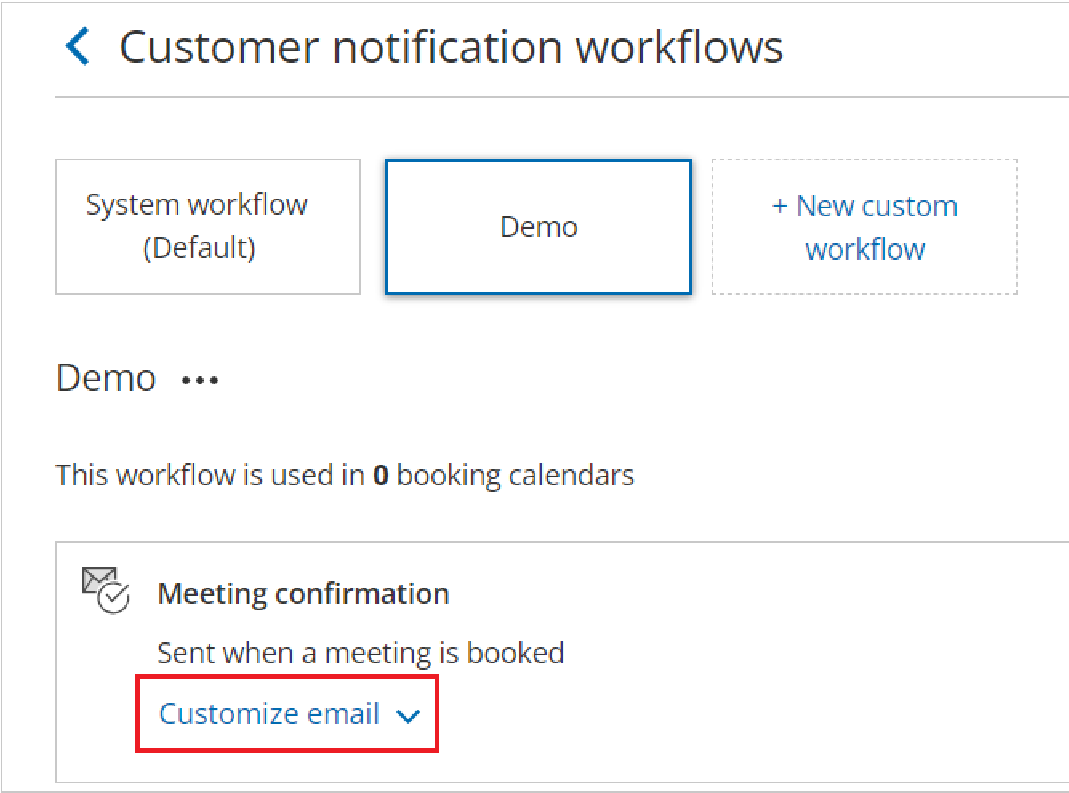


Figure 3: Customizing the meeting confirmation email

Steps for customizing email notifications

1. In a notification workflow, click **Customize email** (Figure 3) below the title of the notification trigger.
2. Here, you can customize any of the text in the subject line and body of the email.

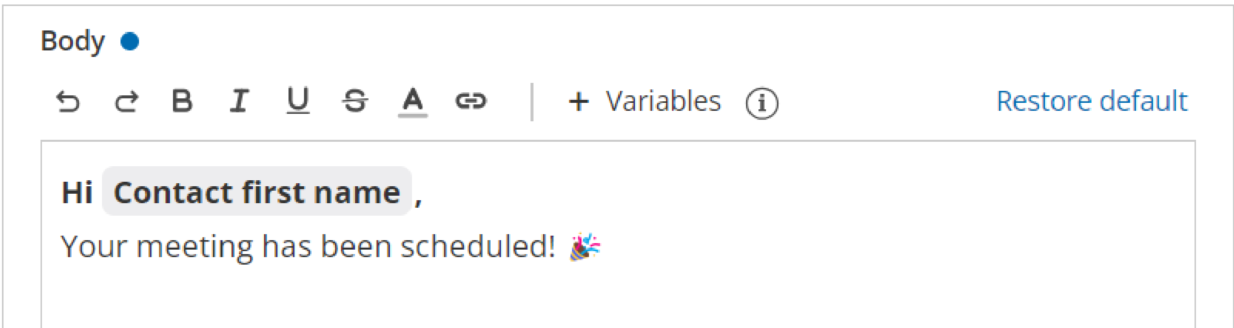


Figure 4: The text toolbar

- You can add variables, which are dynamic fields, by beginning a word or phrase with the **@** symbol. These fields are supplied by the details of the scheduled booking. To see the full list of variables, click **+Variables** and scroll through the list. See here for a glossary of each variable.
- At any time, you can restore the original email by clicking **Restore default** in the toolbar.

3. To save your changes, click **Save** at the bottom of the screen.

Variables glossary

Below is a full list of the variables available when customizing an email. Variables are dynamic fields that add meeting-specific data into the email body: they will be replaced in the email by the corresponding data. If the variable is present in the email template, but there is no data to fill the field, then it will be blank.

Contact data

With these variables, which populate the email with the contact's information, every email notification the customer receives will be personalized.

Meeting data

These variables populate the email with information concerning the meeting. They help you make the notification emails informative and useful: you can add these fields to provide the customer with a link allowing them to reschedule the meeting, or a link directly to the video conferencing app where the meeting will be held.

1. Additional attendees: Any other users attending the meeting from the host side.
2. Additional guests: Any other guests added to the meeting by the customer.
3. Booking form transcript: A transcript of the customer's answers and selections in the booking form.
4. Booking ID: The unique identifier generated when the booking was made.
5. Cancel link: A link to cancel the meeting.
6. Meeting date: The date the meeting is scheduled to occur on, in the customer's time zone.
7. Meeting location: The location selected by the user, based on the options you provide. If the customer selects:
    - Video conferencing (Google Meet, Zoom, Microsoft Teams, GoToMeeting, Webex) This field will populate with a message inviting the customer to use a URL link to the meeting. The message varies depending on the conferencing app,
    - Physical location: This field will populate as the address for the meeting.
    - Phone call: This field will populate with the customer's phone number.
8. Meeting time: The time of the scheduled meeting in the customer's time zone.
9. Reschedule link: A link to reschedule the meeting.
10. Reschedule reason*: This will populate with the reason given when the meeting was rescheduled. Note that this variable is only available in the **Meeting rescheduled** email.
11. Cancellation reason*: This will populate with the reason given when the meeting was cancelled. Note that this variable is only available in the **Meeting cancelled** email.

Sharing your booking calendar

Last Modified on Aug 14, 2024

Once you have created a booking calendar, the next step is to share it so you can enable customers to easily schedule time with you.

There are multiple ways of sharing your booking calendar: Embedding a standalone booking calendar on your website, sharing a link to it, or by pairing it with a chatbot, routing form, or booking hub, and publishing those.

> **Note:**
>
> Your booking calendar needs to be published before you can share it. To publish, go into the builder, and click the **Publish** toggle at the top right-hand corner.

Share a link

You can share your booking calendar directly to a customer with a link. It will be displayed on a page which you can customize to match your branding.

To design your page and generate a link, follow these steps:

1. In the booking calendar builder, click the **Share a link** tab.
   - You can also share from the lobby. Click the **Share** button next to the booking calendar you want to share, then follow the steps from point 4 below. If you click **Design your page**, follow the points below from step 2.
2. A page displaying a preview of your booking calendar will load, with a toolbar on the right (Figure 1) allowing you to customize the title, colors, and other features of the page. Here, you can:
   - Choose the layout you prefer
   - Choose a color gradient, or upload an image as the background
   - Choose the color of the buttons on the page
   - Add an image such as a logo or profile picture
   - Write heading and body text
   - Add text to be displayed in a footer, such as a disclaimer
3. Once you are happy with the customizations you have made, click **Save** and then **Share your page**.
4. In the pop up that opens (Figure 2) you can:
   - Select that the linked booking calendar can only be used to schedule one meeting (by checking the **One-time use** box)
   - Add UTMs to the link
   - Download the link as a QR code as opposed to a URL
5. Once you are happy with the URL settings, click **Copy & close** to copy the link, and paste it wherever you would like the share the link.

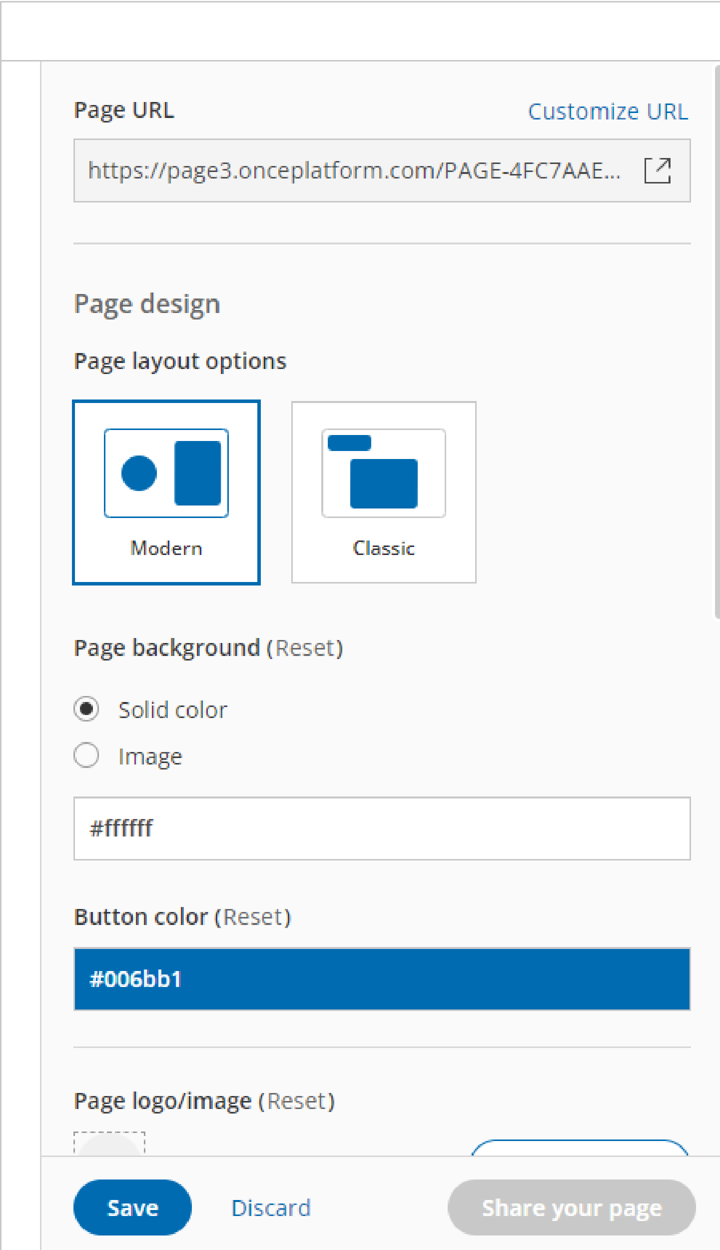


Figure 1: The toolbar allowing customization of your booking calendar when sharing with a link

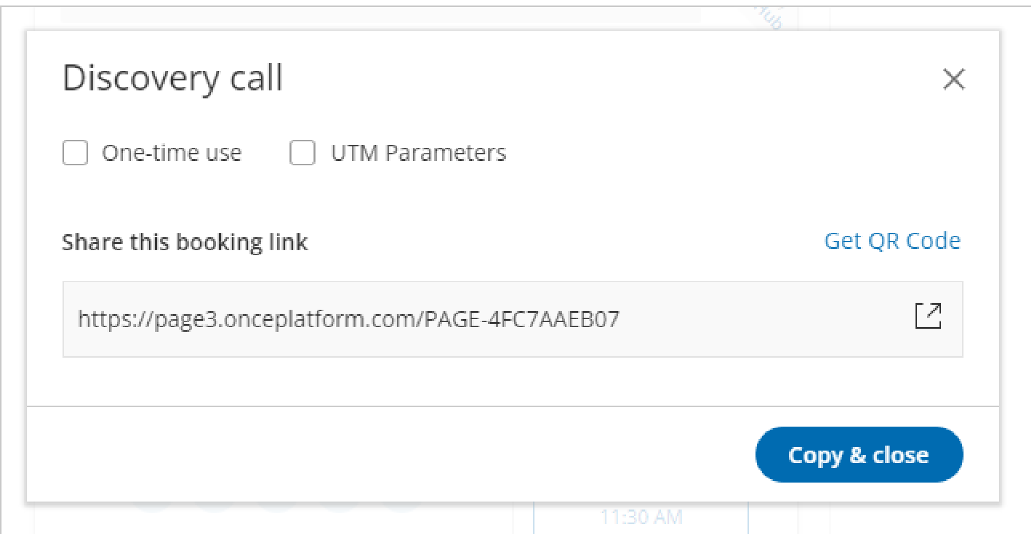


Figure 2: Copying the link to your booking calendar

Prepopulating booking calendar answers

When you share a booking calendar with a link, you can add parameters to the URL. These will provide information about your customer which will be automatically displayed in the booking calendar when they open it. Prepopulating booking calendar answers allows you to streamline your customers' experience when scheduling time with you. You can prepopulate a booking calendar with a customer's name and email address.

How to prepopulate booking calendar answers

1. Get the URL for the booking calendar you want to share.
2. Paste it somewhere you can edit it, like an email, or text editor.
3. To begin adding parameters, add a "?" to the end of the link.
    - Use "%20" to add a space between words.
    - A *variable* is the type of information, and the specific information you want to add is a *value*.
4. Immediately after that, add the following variables and values you'd like to use:
    - **Name**: E.g.: name=Mike%20Smith
      Fills the customer's full name in the booking calendar.
    - **Email**: E.g.: email=MikeSmith@example.com
      Fills in the customer's email address in the booking calendar.

Once you've added in the relevant variables, copy the new link, and share it as usual. The information that you added will appear in the booking calendar when your customer opens it.

Embed on website

You can embed your booking calendar in your website, providing an easy way for customers to book with you on your own page.

Website embedding is available to both types of OnceHub users, although member users can only embed booking calendars of which they are the sole host, whereas admins can embed any booking calendar on their account.

Your booking calendar's color palette is customizable, meaning that the color of the buttons and background of your booking calendar can be changed to fit the theme of your website.

To share your booking calendar by embedding it into a website, follow these steps:

1. Open the booking calendar which you would like to share.
2. From the top menu, click the **Share** button.
    - You can also share from the lobby. Click the **Share** button next to the booking calendar you want to share, then **Embed on website**, then follow the instructions.
3. Select the color you'd like the booking calendar's theme to be, and then click **Get the code**.
4. Paste the code into the relevant section on your website.

Now your booking calendar is embedded, and your customers can schedule time with you directly from your website.

Use chatbots for scheduling

One method of deploying your booking calendar is by pairing it with a chatbot.

Open or create a chatbot, and on the right-hand menu titled **Add interaction**, scroll down to the actions heading, where you will see **Booking calendar**. Drag this interaction to where you want it to appear in your routing form. Select which booking calendar you want to appear here by using the drop-down menu on the right.

Using a chatbot with your booking calendar allows you to route your customers more effectively by asking qualifying questions, and directing them to the relevant calendar. You can add multiple booking calendars to a chatbot, to enable more accurate routing in one spot.

Learn how to create and route chatbots.

Use routing forms for scheduling

One method of deploying your booking calendar is by pairing it with a routing form.

Open or create a routing form, and on the right-hand menu titled **Add interaction**, scroll down to the actions heading, where you will see **Booking calendar**. Drag this interaction to where you want it to appear in your routing form. Select which booking calendar you want to appear here by using the drop-down menu on the right.

Using a routing form with your booking calendar allows you to route your customers more effectively by asking qualifying questions, and directing them to the relevant calendar. You can add multiple booking calendars to a routing form, to enable more accurate routing in one spot.

Learn how to create and route routing forms.

Use a booking hub for scheduling

Booking hubs enable you to cater to many scenarios with a simple solution: Visitors can select from multiple services or team members in one place.

Booking hubs function by allowing you to combine multiple booking calendars for display to your customers. This makes scheduling with booking calendars more versatile and allows you to cater for diverse scheduling scenarios.

Learn more about creating and sharing a booking hub.

Booking calendar access permissions

Last Modified on Nov 4, 2024

There are four types of users in a OnceHub account: account owners, administrators, team managers and member users. Read on to learn the different abilities and permissions that each user type has within booking calendars. For a full breakdown of the differences among user types, see here.

To check what user type you are, click on your profile picture in the top right-hand corner of any OnceHub page, and your user type will be displayed below your email ID. (Figure 1)

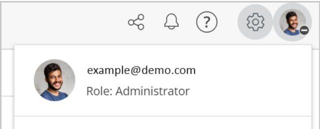


Figure 1: User type displayed at profile settings

Administrator

Administrators have access to all account settings, except for account deletion.

- Administrators can view and edit the settings of all booking calendars in their account.
- Administrators can make other users administrators.

Account owner

The account owner has all the same access and permissions as administrators, as well as account deletion.

- The person who created the OnceHub account is automatically the account owner.
- Only one user can be the account owner; if this role is transferred, the original account owner becomes an administrator.
- In terms of using booking calendars, there is no difference between and account owner and administrator's permissions.

Team manager

The team manager plays a role somewhere in between member users and administrators. They are assigned a team of users which they can manage similarly to an administrator, but don't have permissions outside of their team. For a full breakdown of what team managers can and can't do, see here.

- Team managers can create new booking calendars, hosted by themselves or team members.
- They can edit and delete booking calendars hosted by themselves or team members.
- They can edit basic parts of team members' profiles.

Member

Members have limited access to account configuration settings.

- They can see and edit booking calendars that they are the only host of, and that has no additional team members.
- If they are part of a booking calendar in which there are multiple hosts, or that is hosted by a team, they can only view the booking calendar, but can not edit it. If they are not the hosts of a calendar, they cannot edit or change any settings of it.
- They can create booking calendars, but only for themselves. A booking calendar hosted by a team can only be created by an administrator.
- Members can share any page on their account.

Notifications

Last Modified on Aug 1, 2024

Setting up notifications is a vital part of scheduling, because they ensure that your customers are kept informed of the status of your meeting, and reminded of upcoming meetings. You can customize when they are sent out and how they are delivered to your customers in the Customer notifications section.

Customer notifications

You can access settings for customer notifications in the booking calendars lobby, on the left-hand sidebar, under the heading **Scheduling**. (Figure 1)

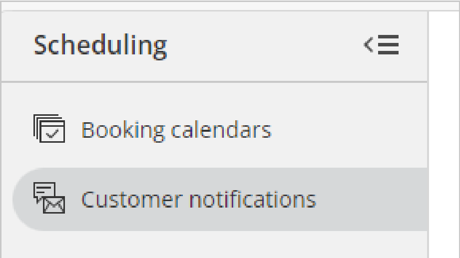


Figure 1: The customer notifications menu

Here, you can customize customer notification workflows, or use the default: system template workflow. The default customer notification workflow will apply to all new booking calendars. The format of this workflow is displayed below the options for which workflow you'd like to use.

Here's a detailed breakdown of how to create and apply customer notification workflows.

You can customize when and why customers receive notifications on this page. There are three main meeting points:

- **Meeting is booked**
- **Meeting rescheduled**
- **Meeting canceled**

You can select whether you'd like your customers to be reminded via their provided email address, or - if they have provided their cellphone number - by SMS.

User notifications

OnceHub users can receive notifications when meetings are scheduled, updated, or canceled by customers. They help you keep track of the status of your meetings and ensure you're reminded of upcoming meetings.

The user notifications menu is found in your profile settings.

Here you can select which notifications you would like to receive, and whether you'd like to receive them over email or via SMS. You can choose to receive notifications when a customer confirms, reschedules, or cancels a meeting.

To access this menu, follow the steps below:

1. Click on the profile picture or initials at the top right of the OnceHub dashboard.

2. Select **Profile settings**.
3. On the left-hand menu on the account settings **Overview** page, you will find **User notifications**. (Figure 2)

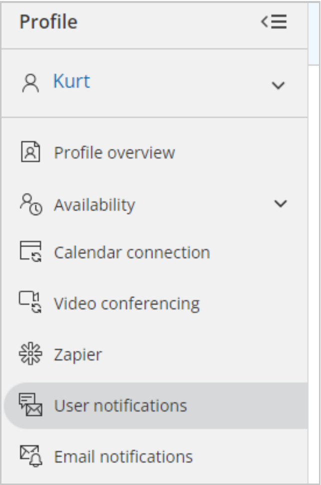


Figure 2: User notifications

When you are finished configuring your notifications, remember to click the **Save** button to confirm the new settings.

The Alert center

Alerts are a feature which enable the administrator, and any users they add, to be CC'ed into notification emails about bookings made, canceled, or rescheduled with any users and/or scheduling tools in the account. The email will contain all the relevant information about the meeting.

Learn more about creating alerts here.

Integrations

Last Modified on Aug 23, 2024

There are multiple integrations available with booking calendars. You can use Zapier with booking calendars to streamline your processes,

Integrating booking calendars with Zapier

Zapier is a platform that enables quick and simple data movement between applications.

OnceHub provides support for users wishing to utilize Zapier with booking calendars.

To learn how to connect your OnceHub and Zapier accounts, read this article to learn more.

OnceHub provides multiple Zapier triggers for OnceHub activity. They are divided into two groups: specific and composite. Learn more about the OnceHub triggers on Zapier

Once you register with Zapier, you can create Zaps. Zaps are workflow automations linking two or more apps, through Triggers and Actions. Each Zap is triggered by an event in one app, and automatically completes an Action in a second app using the data collected from the Trigger. For example, you can set up a Zap that creates or updates a contact in your CRM every time a new booking is made via OnceHub.

The platform is connected to more than 1000 applications in many categories, including CRM, invoicing, productivity, email marketing, and more. OnceHub is part of the Zapier app community, allowing you to easily push Customer and Booking data to your favorite apps.

Connect to your CRM

Our integration connects to lead objects, contact objects, and events in your CRM. Both Salesforce and HubSpot integrations will update with meetings booked and contacts created via booking calendars. Any bookings made using booking calendars will automatically be updated in your connected CRM.

Contacts update based on the email they provide during an interaction (chatbot or form conversation, or previous bookings). Once you've collected their email, this will either create a new record or, if your CRM account recognizes the contact's email, update the current lead or contact record. Bookings update automatically when they are made, rescheduled, or canceled.

1. Click on the **Account** menu (the gear icon in the top right corner).
2. On the **CRM** page **→ Booking calendars, chatbots, and routing forms**, find **Salesforce** or **HubSpot** and click **Start**.
3. Follow the directions to connect your Salesforce or HubSpot account to OnceHub.
4. Map the fields you wish to update according to your organization's needs. Each drop-down menu included on this step displays all the relevant OnceHub fields you can map to the relevant Salesforce field.
    - Note that this step is optional, as all required fields will already be mapped.
5. Your CRM will now be updated when someone schedules a meeting through your booking calendar, or when a new contact is made or an existing contact needs to be updated.

Troubleshooting

A number of issues may cause problems with the Salesforce integration, such as an API user connection issue or required fields which are not mapped.

You can read more about these issues and how to resolve them in our Salesforce connector troubleshooting article.

Connect your calendar

You can skip this if you've already connected your calendar during onboarding.

With a connected calendar, OnceHub knows not to offer the times when you're busy to people booking with you. It also adds all booked appointments to your connected calendar automatically.

If you didn't already connect your calendar in the onboarding wizard, or want to amend your calendar settings, you can do this at any time in your profile settings. In the top right-hand corner, select your profile picture or initials → **Calendar connection**, (figure 3) and follow the prompts to connect. You can connect your existing Google, Office 365, iCloud, and Exchange/Outlook calendar to OnceHub.

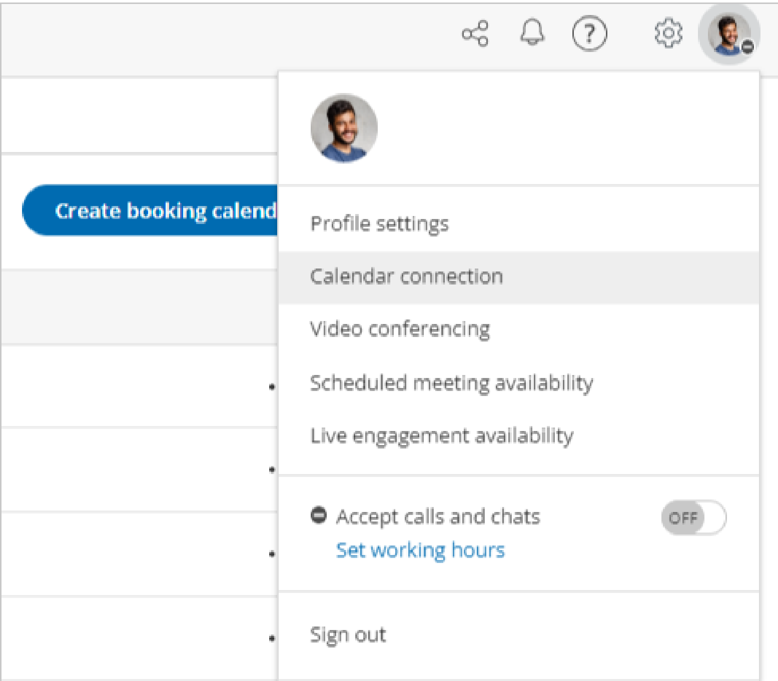


Figure 3: Calendar connection settings

By default, OnceHub reads busy time from your main calendar. If your connected account has multiple calendars—for instance, one for work and another for personal events—you can opt to have OnceHub read busy time from them as well.

Connect your video conferencing

If you connected your video conferencing app during onboarding, you can skip this part.

Booking calendars seamlessly integrates your booking activities with Zoom, Google Meet, Microsoft Teams, GoToMeeting, or Webex Meetings through all phases of the booking lifecycle. When a booking is made, video conferencing session details are integrated with all booking calendars notifications and a video conferencing session will be created automatically.

Your customer will be given a choice to meet via any of the video conferencing apps you have connected to. For example, if you have linked your OnceHub account with Zoom and Google Meet, your customers will be able to choose between those two apps. Your customer will receive all connection details in the scheduling confirmation email and calendar invite.

If you're taking video meetings, you'll need to update your booking calendar to reflect this.

If you didn't already connect your video conferencing app in the onboarding wizard, or want to amend your virtual conferencing settings, you can do this at any time in your profile settings. In the top right-hand corner, select your profile picture or initials → **Video conferencing**, and follow the directions to connect your video conferencing app.

Locations and Rooms

Last Modified on Dec 27, 2024

Locations and Rooms in OnceHub help streamline scheduling for meetings held in physical spaces, such as meeting rooms or conference rooms. By integrating your room calendars with OnceHub, you can seamlessly manage bookings and streamline in-person scheduling.

To access this feature, navigate to the Account menu (gear icon) in the top-right corner and select Locations and rooms.

Connecting your room workspace

To begin, you can link your room workspace to your OnceHub account:

- Supported Platforms: You can currently integrate Microsoft 365 room workspaces, with Google Workspace room workspaces support coming soon.
- Connect Rooms: Click Connect rooms and select the desired account in the popup, then follow the onscreen steps to integrate your room workspaces with OnceHub.

Creating Locations

Once your room calendars are connected, you can create a Location to pair with these resources:

1. Add Location: Click on Add location and then provide the Address for the physical location you will be offering scheduling for.
2. Assign Rooms: For each Location you have different options available for room assignments:
    1. Single room: Bookings will be made with the selected workspace.
    2. Multiple rooms: Bookings will automatically be made with one of the assigned workspaces available at the selected time.
    3. No rooms: you can also choose to not use a workspace. Bookings for this Location will then default to the connected calendar of the assigned host for that meeting.

Adding Additional Information to the Address

When creating a Location, you can include Additional Information (optional) such as parking instructions or building access details. This information will be shared with guests in their booking confirmation.

Using Locations with Booking Calendars

Once a Location is created, it will be available as an option when setting up Booking calendars, or in the Scheduled meeting availability section of each user's profile:

- Access to Locations: All Users on your account can select these Locations when assigning a physical location, but only Administrators can access the Locations and rooms lobby.
- Effortless Scheduling: Assigning a Location ensures accurate meeting logistics and reduces scheduling conflicts.

By leveraging the Locations and Rooms feature, you can effectively manage physical meeting spaces and create a more organized scheduling experience for everyone involved.

Creating and managing a booking hub

Last Modified on Aug 26, 2024

Booking hubs enable you to cater to varied scenarios with a simple solution: Visitors can select from multiple services or team members in one place.

Booking hubs function by allowing you to combine multiple booking calendars for display to your customers. This makes scheduling with booking calendars more versatile and allows you to cater for diverse scheduling scenarios.

To access booking hubs, click **Booking hubs** on the left-hand side of the screen. Here, you'll find the lobby, where you can create new and manage existing booking hubs. You can search through your existing booking hubs by typing the name of the booking hub (or, if you're an account admin, the owner's name) or the booking hub's share link in the search box.

Creating a new booking hub

1. To create a booking hub, click the **+ Create new** button on the home page (Figure 1).

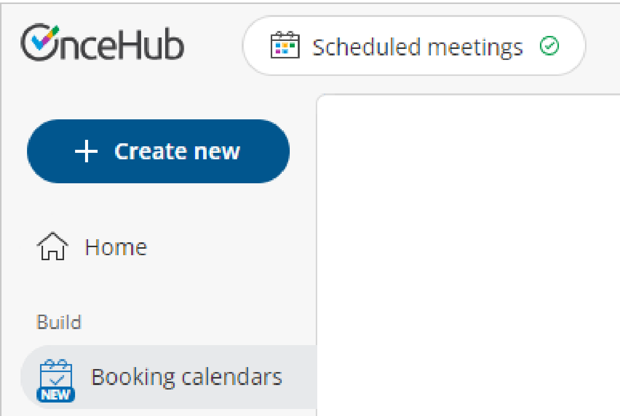


*Figure 1: the **+ Create new** button*

2. At the bottom of the pop-up, click **Create** in the **Booking hub** row.

3. Name the booking hub, select the owner, and click **Create**. The owner will be able to edit the booking hub.

4. The next pop-up (Figure 2) will display the booking calendars that you can add to the booking hub, according to your filters: you can select whether you want to display booking calendars hosted by all hosts, or those hosted by a specific team/user, or use the search bar to find a specific booking calendar.

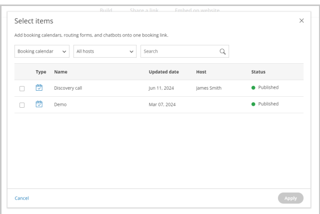


Figure 2: Selecting booking calendars to add to the booking hub

5. Click the checkbox to select the booking calendars you want in your booking hub, and then click **Apply**

6. You will now see a preview of your booking hub with each of the booking calendars displayed in the middle.

You can configure your booking hub on this page:

- Click **+ Select items** at the top of this page to add more booking calendars to the booking hub.
- You can drag each booking calendar to change the order that they are displayed.
- When you click on an individual booking calendar, you can add a description in the toolbar on the right (Figure 3). Use the description to help customers understand the choices available.
- In the same toolbar, you can add an image to serve as a logo or profile picture, to further differentiate the booking calendars.
- To remove a booking calendar from the booking hub, hover over a booking calendar in the central display, and click the bin icon.

7. Click **Save** at the toolbar on the right to confirm any changes you have made.

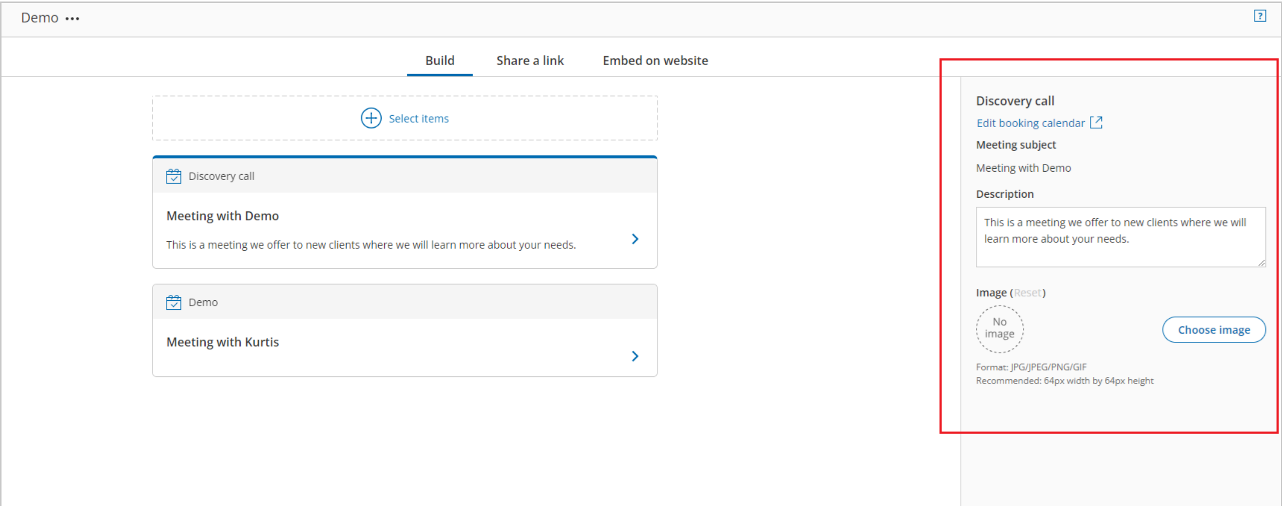


Figure 3: The booking hub toolbar

Sharing a booking hub

Share a link

You can share your booking hub directly to a customer with a link. It will be displayed on a page which you can customize to match your branding.

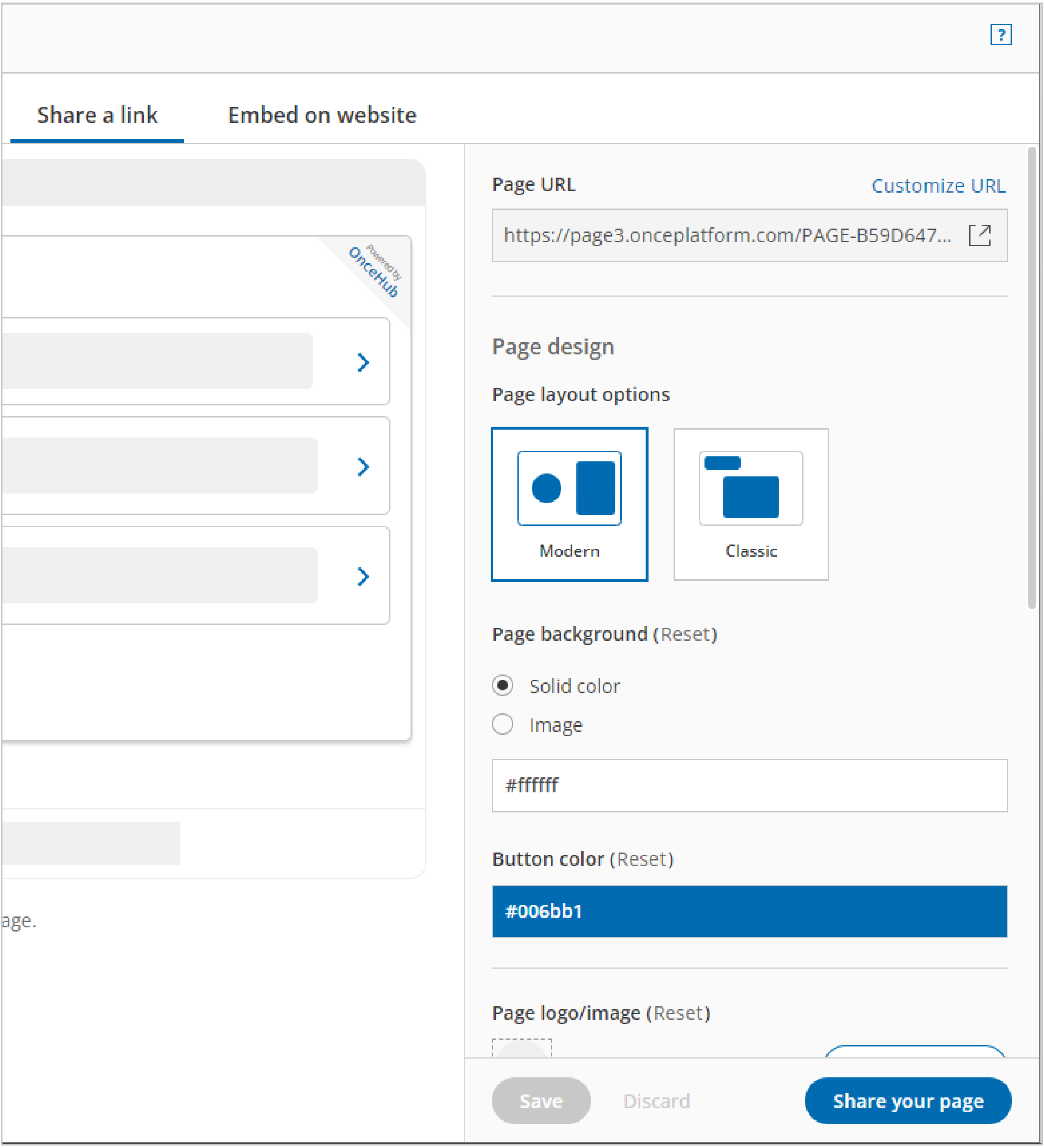


Figure 1: The ***Share a link*** *tab*

To design your page and generate a link, follow these steps:

1. At the top of the booking hub builder, click the **Share a link** tab.
2. A page displaying a preview of your booking hub will load, with a toolbar on the right (Figure 1) allowing you to customize it in these ways:
    - Choose the layout you prefer
    - Choose a color or upload an image as the background
    - Choose the color of the buttons on the page
    - Add an image such as a logo or profile picture
    - Write heading and body text
    - Add text to be displayed in a footer, such as a disclaimer

This customization applies to the entire booking hub and carries through to the booking calendars that have been included.

1. Once you are happy with the customizations you have made, click **Save** and then **Share your page** at the bottom of the toolbar.
2. In the pop-up that opens (Figure 2) you can:
   - Add UTM parameters to the link.
   - Download the link as a QR code, as opposed to a URL.
3. Once you are happy with the URL settings, click **Copy & close** to copy the link, and paste it wherever you would like to share the link.

Embed on website

You can embed your booking hub in your website, providing an easy way for customers to book with you on your own page.

Your booking hub's color palette is customizable: the color of the buttons and background of your booking hub can be changed to fit the theme of your website. This customization applies to the booking hub and carries through to the booking calendars that have been included.

To share your booking hub by embedding it into a website, follow these steps:

1. From the top menu, click the **Embed on website** button.
2. At the toolbar on the right, select a theme color.
3. At the bottom, click **Save** (if you have made any changes) and then click **Get the code**.
4. Paste the code into the relevant section on your website.

Now your booking calendar is embedded, and your customers can schedule time with you directly from your website.

Joining your organization's OnceHub account

Last Modified on Sep 29, 2023

In this article, you will learn about joining your organizations OnceHub account after the Administrator within the organization has assigned you a User profile.

1. First, your OnceHub Administrator will add you as a User to your organization's OnceHub account.
2. You will then receive an email invitation.
3. To log in to your account, simply click the **Sign in to your account** button in the invitation.
4. Create your personal OnceHub password and then click **Sign in** to get started.

> **Note :**
>
> Invitation sign-in links are valid for 24 hours. You should access your account within the timeframe to prevent the link expiration.

Below are some FAQs regarding joining your organization's OnceHub account:

I have not received an email invitation

If you have not yet received an invitation, you should ask the OnceHub Administrator to add you as a User. You will then receive an invitation with a sign-in link.

If your Administrator sent you an invite and you still can't see the email invitation, check your spam folder. You can also ask the OnceHub Administrator to resend it to you. Be sure to confirm they sent the invitation to the correct email address.

My sign-in link has expired, what should I do?

For security reasons, invitation sign-in links are valid for 24 hours. You should contact your Administrator and ask them to resend the invitation. This will reset the 24-hour time frame and allow you to sign-in to the account.

Can I change my sign-in ID after I sign up?

Unless you're using a G Suite ID to sign into your account, you can change your sign-in email. Learn how to change your sign-in ID

My account type is Member or Administrator - What does this mean?

Please see the Member vs. Administrator article to learn about your account type.

Can I delete my profile?

Only an Administrator can delete your profile. Even if you are an Administrator, you cannot delete your own profile. Only another Administrator can delete it.

What happens to my Booking pages if my User profile is deleted from the account?

If you are the Owner of at least one Booking page, all Booking pages will be automatically reassigned to an Administrator with an assigned scheduled meetings license when your User profile is deleted.

What happens to my Booking pages if the scheduled meetings license is unassigned?

If you are the Owner of at least one Booking page, all Booking pages will be disabled automatically when the scheduled meetings license is unassigned.

I am trying to sign up but see an alert message that there is already an account with my ID

If you want to use this ID, you will need to delete your other OnceHub account first. Follow these steps to delete the account.

1. Sign in to OnceHub with that ID.
2. In the top navigation menu, click on the gear icon.
3. Click on Settings and select **Delete account**. This will free up the ID.
4. You can then return to the invitation email, click the sign-up link, and sign up with that ID.

Understanding my profile settings

Last Modified on Oct 28, 2024

Each user has a user profile that contains their details and the personal settings for their account. Members can only access their own profile, while administrators can access and edit certain sections of other users' profiles. Learn more about editing other user profiles

If you have received an invitation email from your organization, you will first need to join your Organization's OnceHub account.

Read on to find out the profile settings that are available in OnceHub.

Accessing your User profile

1. Sign in to your OnceHub Account.
2. Click on your profile image or initials in the top right corner and select **Profile settings** from the menu.

My profile sections

When you click on your profile settings, you'll see a menu directing you to key profile settings:

- Profile settings:
  This takes you to your account overview, where you'll see the following options:
  - View and edit personal details such as your photo, user name, Role, and Email ID. Integrations, calendar connection, licenses, product status, and owned booking pages are also displayed in this section.
- User integrations:
  This takes you to the integrations page, where you can manage the integrations linked to your profile.
  - Calendar connection: Connect your calendar to OnceHub.
  - Video conferencing: Connect your video conferencing app to OnceHub

- Scheduled meeting availability
- Live engagement availability

  Once you're in your profile settings, you'll see a menu on the left with access to the above settings, as well as these:

- User notifications: Control the settings for email notifications sent to users and customers.
- SMS notifications: Choose if you want to receive OnceHub booking notifications via SMS, and enter your mobile number details.
- Date and time: Set your default time zone, date format, time format, and week start day.
- Password: Change your password.
- Authentication: Configure two-factor authentication for your account.
- Permissions: Manage various permissions for users. Only administrators have access to this section.

Personal details section

Personal details section

The Overview section allows you to update personal details, assign licenses to a user, and shows a summary of each user's information.

1. In the **Overview** section, you can view the following information:

   - **Photo:** your user photo will be shown as the Account and Profile icon in the top right corner. To upload an image, you must use a JPG, PNG or GIF format (max 200KB). When uploaded, the image can be cropped or scaled to a 200 x 200 pixels square.

     > **Note :**
     >
     > When using OnceHub, the image will be set as the default booking page image for booking pages you own.

   - **First name**: This information is taken from the sign-up form filled out when you first signed up for OnceHub. Your first name can be changed at any time.
   - **Last name:** This information is taken from the sign-up form filled out when you first signed up for OnceHub. Your last name can be changed at any time.
   - **Role:** Users can be either an Administrator, member, or team manager. Your user role can only be edited by a OnceHub administrator.
   - **Email ID:** By default, this is the email address you used to sign up for OnceHub. If you want to change it, you will be required to provide your OnceHub password. Learn more about changing your Email ID
   - **Calendar:** Any calendars connected to your user account will be displayed here. It is recommended that you connect a calendar to your account in order to optimize scheduling and avoid double-booking. Learn more about Calendar connection
   - **Integrations:** Any third-party integrations connected to your account will be displayed here.

2. To edit your **Personal details**, click the three dots next to the first or last name fields to launch the Personal Details edit window (Figure 1). Once the desired changes have been made, click the **Save** button.

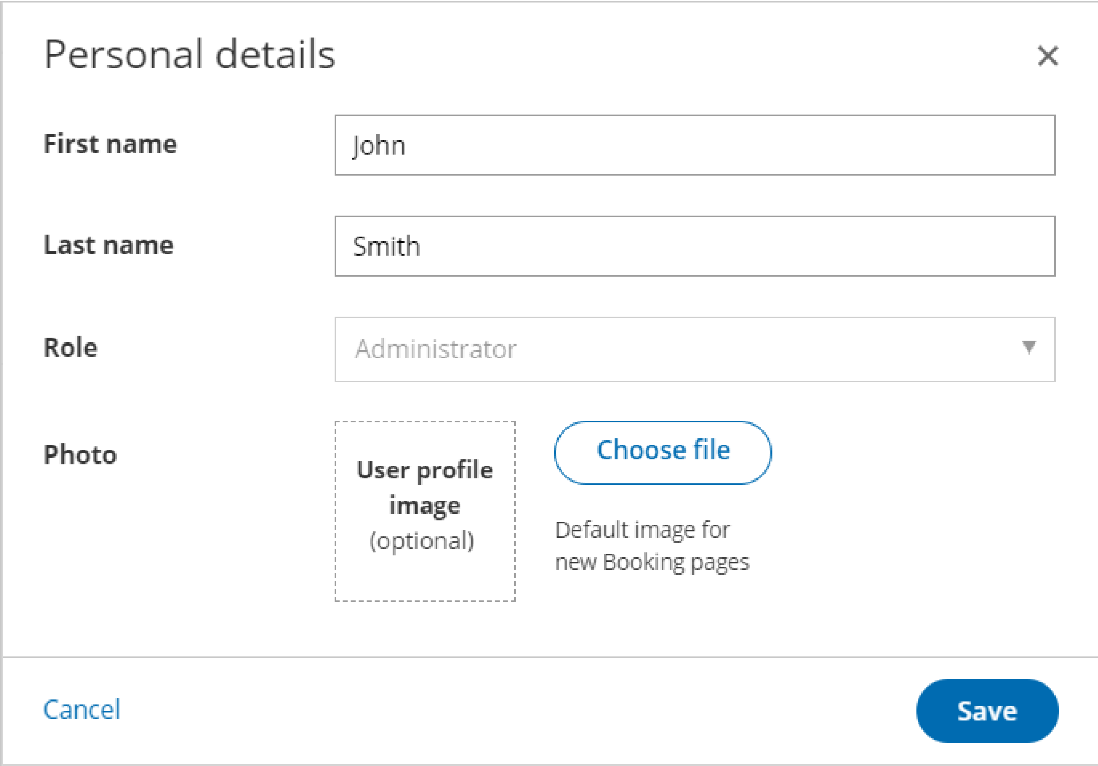


Figure 1: Personal details

Licenses

If you are a Member, you will see the following in the **Licenses** area:

- Which features you have licenses for.

If you are an Administrator, you will see:

- Which features you have licenses for. Learn more about purchasing licenses
- How many licenses are assigned and how many are unassigned. Learn more about assigning licenses

Scheduled meeting availability

When you update your scheduled meeting availability, all the booking pages/booking calendars you own can reflect this.

By default, all new booking pages/booking calendars use the owner's profile availability and time zone.

Location

You can update your scheduled meeting availability by selecting your profile picture or initials in the top right-hand corner → **Scheduled meeting availability**.

Here, you can select you hours of availability by setting your times from the drop-down menu. Add time slots by pressing the **+** button.

Click **Add a date override** to set or remove availability for a specific day.

Differences and benefits of using Scheduled meeting availability or Booking page availability

	User availability	Booking page availability
Where do I update my availability?	In one place, no matter how many booking pages you own. Update once and it affects all of them.	On each booking page you own where Scheduled meeting availability is toggled **OFF** for that booking page. Each booking page must be updated individually. Located on the relevant booking page → **Recurring availability** OR **Date-specific availability** → **Use booking page owner's date-specific availability and time zone**.
How do I enter my availability?	**Recurring availability:** Use the check-box to select days of the week and the drop-down time ranges on your profile's **Availability** page. **Date-specific overrides:** Add an exception, select the specific date from the calendar, and specify whether you are unavailable or available for that that exception to your rules.	Use the click-and-drag visual editor on the booking page's **Recurring availability** and/or **Date-specific availability** sections to specify the exact days you are available for meetings.

Setting unique availability for an individual booking page

You may wish to take advantage of scheduled meeting availability while still maintaining an individual booking page with unique availability to that booking page, different from your scheduled meeting availability.

In that case, for the exception to your rules specific to that booking page, go to the relevant booking page → **Recurring availability** and/or **Date-specific availability** section → Select **Set recurring availability / date-specific availability for this booking page only**.

Recurring availability

When to use recurring availability

Update your **Scheduled meeting recurring availability** whenever your general availability changes. This availability is on a per-day basis; for instance, every Monday, every Tuesday, etc.

Increments are on a 15-minute basis. For instance, you can start or end your availability on the hour, or on 15, 30, or 45 minutes after the hour.

How to edit date-specific exceptions

Make sure the day you're changing is selected or deselected, depending on whether you're available that day each week.

If selected, specify the relevant hours you're available for that day.

Date-specific exceptions

When to use date-specific exceptions

You can create an exception for your recurring availability whenever your standard availability deviates from the norm. For instance, you're usually available 9AM-5PM every Monday, but on February 15 you're taking the day off for your birthday and on February 22 you have a doctor's appointment.

How to edit date-specific exceptions

Let's take the examples above. Create an exception by selecting the **Add a date override** button.

Select the relevant day(s) and times you want to create a date override.

Changing your user's availability on their behalf

If you are an admin, you can update any user's availability on their behalf. This allows you to control which time slots show on their booking page without their involvement. There is no need for them to sign into OnceHub or update anything.

To update availability for all the booking pages they own, in the top navigation menu, select the gear icon → users → select the relevant user. In the left-hand menu, under their profile (for example, **Profile: Jane Doe**), select **Scheduled meeting availability**.

Keep in mind that their scheduled meeting availability on their profile will only be updated for booking page where no recurring or date specific availability have been set

Note:

Although OnceHub looks at Scheduled meeting availability by default, keep in mind that if the booking page they own uses booking page availability instead, this will override their Scheduled meeting availability.

Live engagement availability

You can set manual or automatic availability for live chat and instant calls.

Manual availability

In the top navigation menu in the top right-hand corner, select your profile picture or initials. Toggle **Accept chats ON** or **OFF**.

Note: If you close the browser or sign out, you will not be available for accepting live chats.

Automatic availability

In the top navigation menu in the top right-hand corner, select your profile picture or initials. Select **Live engagement availability**. Select the option to set your availability automatically.

Select the days and hours that you're available on a weekly recurring basis.

To set more than one time range on a given day, click on the plus. This will allow you to create a time slot from, for example, 9:00 am - 12:00 pm and 1:00 pm - 5:00 pm.

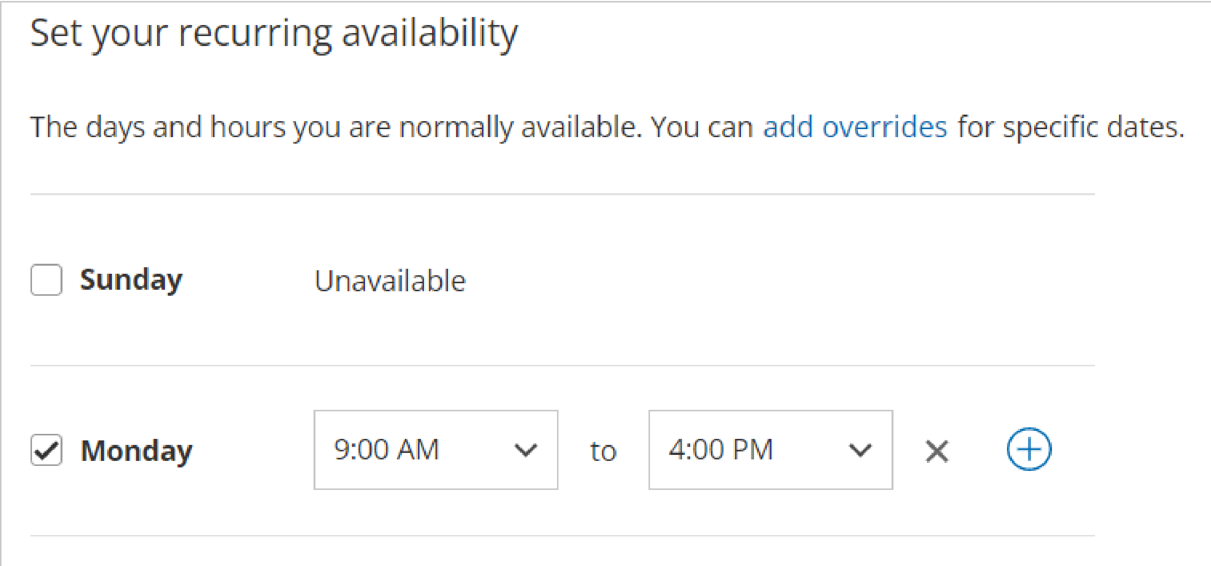


Figure 1: Setting more than one time range

Note: If you sign out or close your browser, you will still be available for live chats. To avoid missing chats, set up notifications to your team chat app (e.g. Slack, Google Chat, Microsoft Teams).

Date-specific overrides

You can also set date-specific overrides by clicking on **Add a date override**. Your date-specific override will override your recurring availability.

Overriding your working hours

Your working hours include your recurring availability plus any date-specific overrides. You can override your working hours by toggling **Accept chats ON** or **OFF**.

Outside working hours, **Accept chats** will be **OFF**. Toggle it **ON** to accept chats temporarily. Remember to toggle it back off, else you'll remain available to accept live chats outside of recurring working hours.

Inside working hours, **Accept chats** will be **ON**. Toggle it **OFF** if you do not want to accept chats temporarily. Remember to toggle it back on to be available to accept chats again.

Email notifications section

The **Email notifications** section allows you to control the settings for email notifications sent to both the user and the customer. You can access the email notifications section from your user profile.

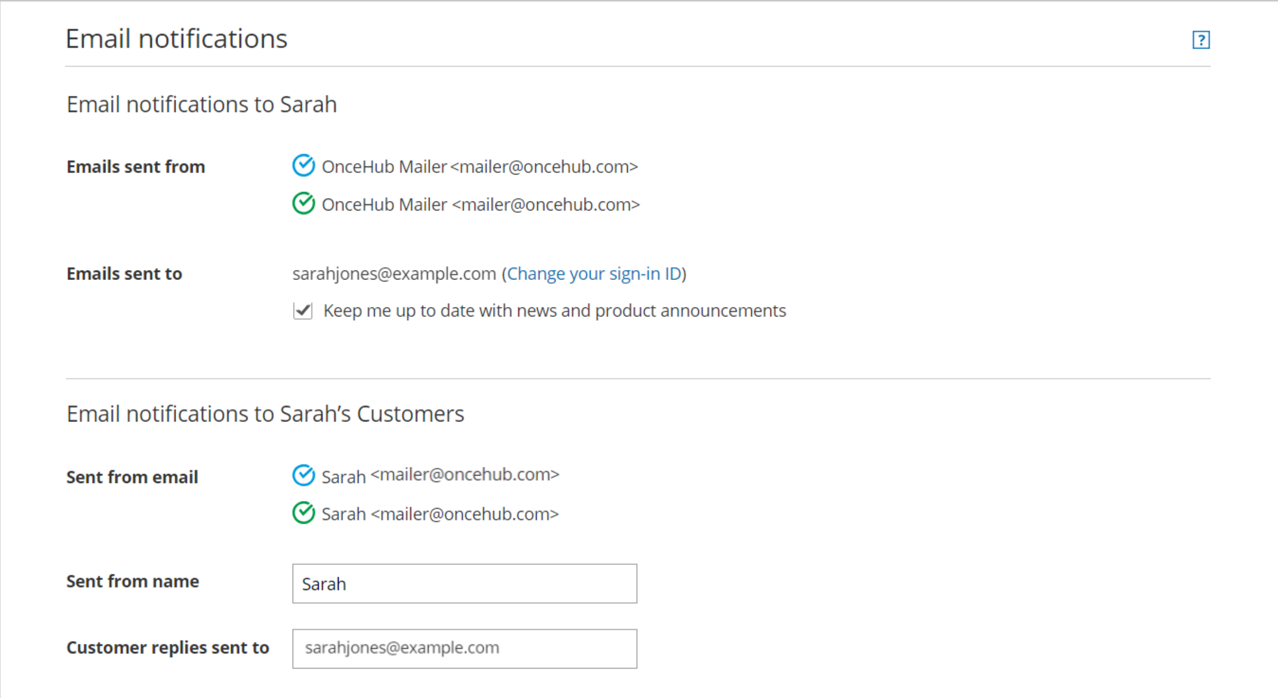


Figure 1: Email notifications section

Email notifications to the user

- **Emails sent from:** This controls the sending name and email address for all generated emails sent to the user.
- **Emails sent to:** This controls the email address where the user receives OnceHub generated emails. By default, user email notifications are sent to the email address that the user used to sign in to their OnceHub account (sign-in ID).

You can also decide whether or not you would like to be sent emails with news and product announcements from OnceHub by checking or unchecking the box. We recommend keeping the box checked as emails are typically used to announce new features and product releases. Find out what's new in our latest release

Email Notifications to the Customer

- **Sent from email:** All OnceHub generated emails sent to customers will be sent from this email.
- **Sent from name:** This is the name that appears in the "From" field in customer email notifications. By default, the email name label will be the user's name entered when the account was created.
- **Customer replies sent to:** Any replies to customer email notifications will be sent to this address. By default, this email address is the same as the email you will receive notifications to. This email can be changed if you want replies sent to a different address.

> **Note:**
>
> Email from your domain can only be applied to OnceHub email notifications. Learn more about sending emails from your domain

SMS notifications section

In this section, you can manage where user SMS notifications are sent to. You can access the SMS notifications section from your user profile.

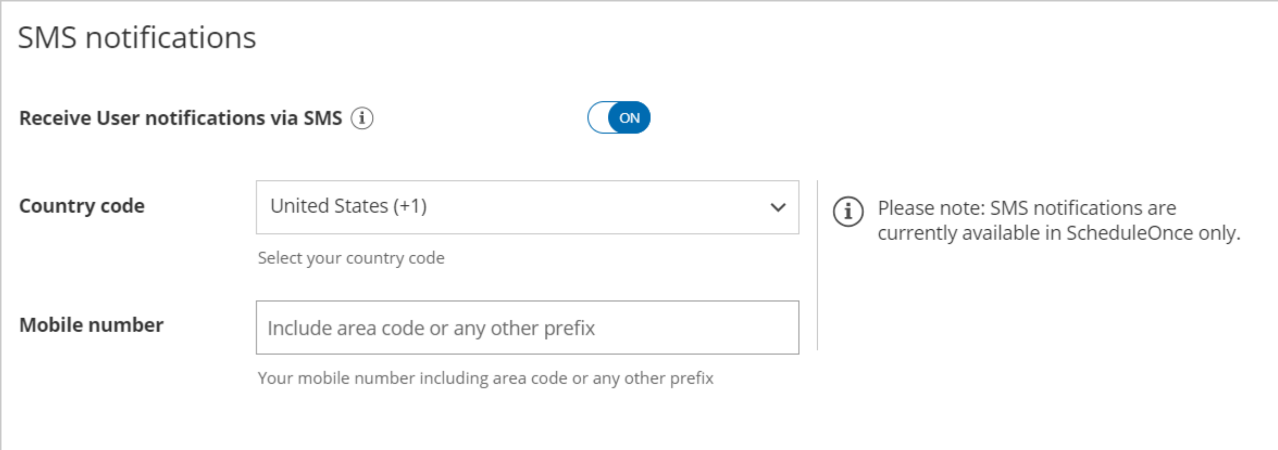


Figure 1: SMS notifications

Receive User notifications via SMS: If you wish to receive SMS user notifications, toggle this field **ON** and enter your mobile phone number here.

Country code: Select your country code from the dropdown menu.

Mobile number: Enter your mobile number here, including your area code or any other prefix.

Note :

To receive SMS notifications on booking activity, you must also enable them in OnceHub under **Setup** → relevant booking page → **User notifications** section.

Adjusting my profile settings

Last Modified on Sep 30, 2024

Adjusting the settings of your OnceHub account might be necessary. Here, you'll find an explanation of how to change some basic profile settings.

How do I change my email ID?

The OnceHub email ID is the email address you provided when you joined the OnceHub account. In this article, you will learn how to change your email ID.

> **Note:**
>
> When using OnceHub for G Suite, your email ID is your G Suite ID and as such it cannot be changed by OnceHub.

Changing your email ID

1. Select your profile picture or initials in the top right-hand corner → **Profile settings** → **Profile overview** → select the three-dot menu next to your profile name → **Edit email ID**.
2. The **Edit email ID** pop-up will appear (Figure 1).

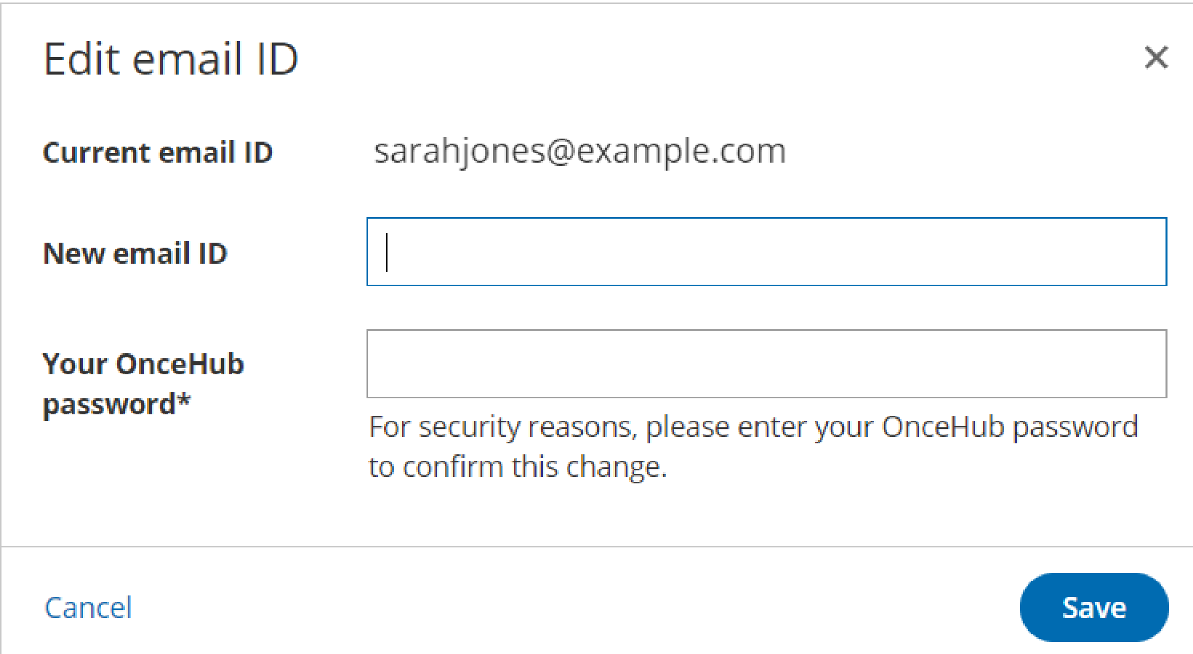


Figure 1: Edit email ID pop-up

3. Enter your **New email ID** and **OnceHub password**.
4. Click **Save**.

> **Note:**
>
> OnceHub Administrators can edit another User's email ID in the User's profile. In this case, the Administrator

will be required to enter their own OnceHub password to confirm the changes. Learn more about editing other User profiles

Date and time section

In the **Date and time** section, you can define the default time zone applied to all OnceHub User apps, and the date and time settings that are applied to the OnceHub User app. You can access the **Date and time** section from your user profile.

Editing your Date and Time settings

1. Sign in to your OnceHub account.
2. Select your profile picture or initials in the top right-hand corner → **Profile settings** → **Date and time**.

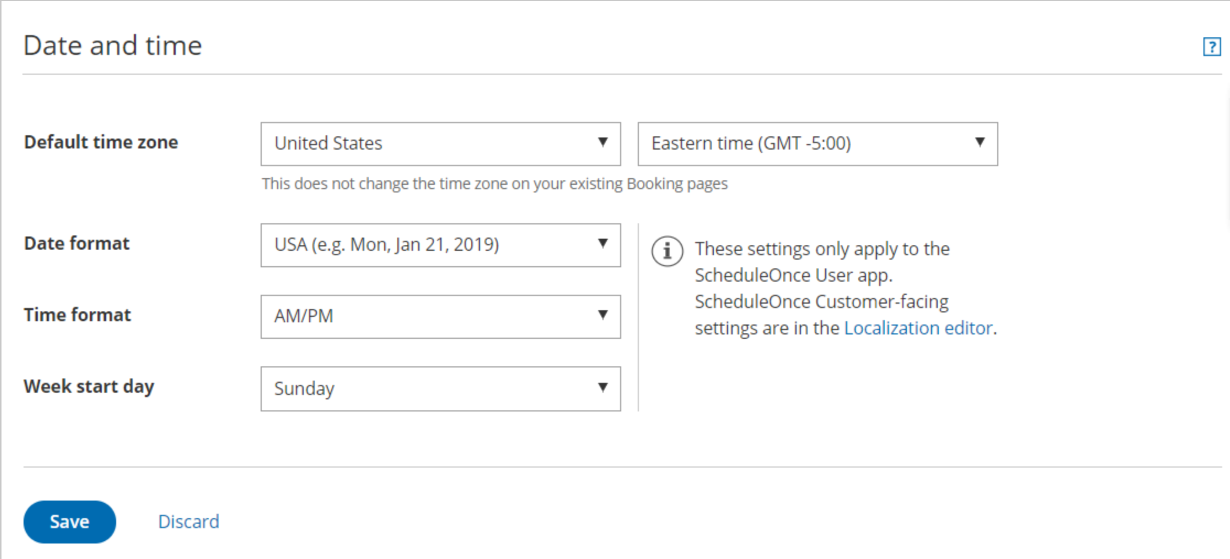


Figure 1: Date and time section

3. Select the **Default time zone** for both OnceHub and Chatbots apps.

> **Note:**
>
> In OnceHub, The default time zone will be applied to all newly created Booking pages owned by the User. Existing Booking pages will remain unchanged. Learn more about the Booking page time zone settings

4. Select the date and time settings applied to the OnceHub User app:

- **Date format:** You can choose between mm/dd and dd/mm formats.
- **Time format:** You can choose between AM/PM or 24hr time format.
- **Week start day:** By default, Sunday is the week start day.

> **Note:**
>
> These settings only apply to the OnceHub User app. OnceHub Customer-facing settings are in the Localization editor.

Set up two-factor authentication

Set up two-factor authentication

Enabling two-factor authentication adds an extra layer of security to your account. You can set up two-factor authentication for yourself in the **Authentication** section of your User profile.

When two-factor authentication is enabled, you'll sign in to your account in two steps using your OnceHub account password and a unique verification code sent to your mobile phone or email.

In this article, you'll learn about enabling two-factor authentication, the sign in process when two-factor authentication is enabled for your profile, and the two-factor authentication lockout policy.

> **Note:**
>
> Two-factor authentication is not available for Users signed in via G Suite or SSO.

Who can set up two-factor authentication?

Any User can enable two-factor authentication for their own profile.

OnceHub Administrators cannot enable two-factor authentication for another User. However, they can disable two-factor authentication for any User. To disable two-factor authentication for another User, the Administrator will be required to provide their OnceHub password.

Setting up two-step authentication

1. Sign in to your OnceHub Account.
2. Select your profile picture or initials in the top right-hand corner → **Profile settings** → **Authentication**
3. Select the method of authentication: phone or email.
4. Toggle your chosen authentication method **ON**. The **Password required** pop-up appears.
5. Enter your OnceHub password.
6. Follow the instructions in the app to verify your chosen method. When it is successfully verified, two-factor authentication will be enabled for your profile.

You will now sign in to your account in two steps.

> **Note:**
>
> Two-factor authentication has a built-in lockout policy to detect irregular activity. If any irregular sign-in activity is detected, your account will be locked. If your account is locked, contact your account Administrator to unlock it.

Password section

In the Password section of the profile screen, you can change your OnceHub password.

- Your OnceHub password should be unique and strong in order to ensure that your account is secure and inaccessible by other people. It is recommended that you change your password from time to time.
- By default, all passwords in OnceHub must be at least six characters long and include both lowercase letters and numbers. Policies can be adjusted to accommodate for stricter requirements. Learn more about OnceHub password policies

Changing your OnceHub password

1. Open your OnceHub account.
2. Select your profile picture or initials in the top right-hand corner → **Profile settings** → **Password**

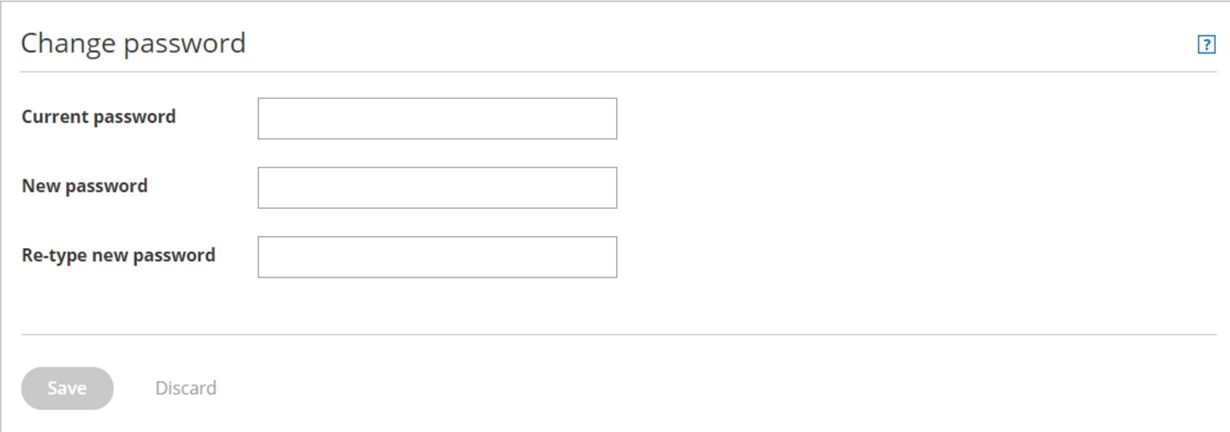


Figure 1: Password tab

3. Enter your current password.
4. Enter your new password. For security purposes, the OnceHub Security policies are applied when you change your password.
5. Re-type your new password, and then click **Save**.

> **Note:**
>
> Users can only edit their own passwords. Administrators cannot edit other Users' passwords.

Permissions

The Permissions section allows OnceHub Administrators to manage product-specific permissions for their own profile and for other Users. You can access the permissions section from your user profile.

Administrators can assign permissions to any User, whether they have assigned them a license or not.

- **Booking pages setup:** When this checkbox is enabled, Members can create Booking pages. By default, OnceHub Administrators can always create new Booking pages. Learn more
- **User availability:** When a User updates their Scheduled meeting availability or Live chat availability, this can be reflected on all relevant Booking pages, chatbots, and forms. This permission allows Users to set their own availability, rather than having an admin control it. Learn more
- **Payment integration:** This permission requires an active connection to your PayPal account. When connected, you can collect payments for bookings and automatically trigger refunds upon cancellations. When this checkbox is enabled, the User will also be able to process refunds manually from within the Activity stream. Learn more
- **Zapier integration:** By default, Users can only trigger Zaps from Booking pages they own. This permission enables a OnceHub Administrator to trigger Zaps from any Booking page. To use the Zapier integration, you must connect to Zapier. Learn more

Guide to account owner, administrator, member, and team manager roles

Last Modified on Nov 29, 2024

There are four possible roles for OnceHub users: **Account owner, administrator, team manager,** and **member**.

Administrator, **team manager**, and **member** user roles have different permissions for each product.

- The administrator has complete access to nearly all functions and data in the OnceHub account.
- The account owner has the same permissions as and administrator, with one difference: they are the only user who can delete a OnceHub account. The account owner role is automatically given to the first user who signed up for a OnceHub account.
- A member has limited access to functionality and data in the account.
- The team manager plays a role somewhere in between an administrator and a member user, where they have access to most functionalities in the account, allowing them to help manage users and scheduling tools, while restricting access to sensitive areas like customer data.

The following table summarizes the differences between administrators and members.

Note:

Changing the user type: The user type can only be changed by an administrator in the user's profile.

This can be done by following these steps:

1. Click the **gear icon** in the top right corner and select **Users**
    - Here you can see all the users on your profile, and their member type under the **Role** column.
2. Click the user whose status will be changed
3. Click the **three-dot menu** next to **Role → Edit role**
4. From the **Role** drop-down menu, select the desired user type.
    - If you select team manager, you can select which team/s this user will be the manager of.
    - Only account owners can transfer their role to other users. When they transfer their role, account owners are downgraded to administrators.

The user's role is separate from whether that user is assigned a seat, which grants them additional functionality.

	Administrator	Member	Team manager
User management			These permissions only apply to users within the manager's team

Manage subscriptions	Purchase subscription, purchase seats, purchase SMS credits.	Cannot manage subscriptions, purchase seats, purchase SMS credits.	Cannot manage subscriptions, purchase seats, purchase SMS credits.
Add and delete users	Can add and delete other users.	Cannot add or delete other users.	Cannot delete other users. Team managers can add member users to the account, but only into their teams.
View and edit user profiles	Can view and edit most parts of any user's profile, except for password.	Cannot access any information about other users.	Can view and edit most parts of any user's profile, except for password.
Third-party integrations Calendar, CRM, and video conferencing	Limited access to settings for another user's third-party integrations. Cannot connect or disconnect an integration on behalf of a user. Connection errors in the integration can be seen.	Can connect and manage their own integrations.	Limited access to another user's third-party integrations. Cannot connect or disconnect integrations for team members. Connection errors in the integration can be seen.
Assign and unassign seats	Able to purchase, assign and unassign seats	Cannot purchase, assign or unassign seats.	Cannot purchase seats, but can assign or unassign seats to team members.
Booking pages			For these permissions to apply to booking pages of which they (or team members) are not owners, team managers must be assigned as editors to the booking page.
Activity stream	Can see all bookings for the account.	Can see all bookings for which the user is the booking owner, reassigned booking owner or editor.	Can view all bookings for themselves and their team's members.
Create booking pages	Can create booking pages.	By default, a member is allowed to create booking pages. The administrator can change these default settings at any point by editing the user profile for that member within the OnceHub permissions section of the user's profile	Can create booking pages on behalf of their team.

Edit booking pages	Can edit all sections in booking pages based on the booking pages access permissions. Learn more about customizing booking page access permissions	Can edit all sections in their own booking pages based on the booking pages access permissions. Learn more about customizing booking page access permissions	The team manager can edit all sections in their own booking pages, and booking pages owned by their team members.
Delete booking pages	Can delete booking pages.	Can delete booking pages. An email notification will be sent to the administrator.	Can delete booking pages if they are added as editors, or if they are owned by team members.
Edit booking page ownership	Can edit booking page ownership.	Cannot edit booking page ownership.	Can edit booking page ownership within team membership.
Create or update event types	Can create and update event types.	Cannot create or update event types.	Can select/deselect event types if they or a team member are owners and are assigned as editors of the booking page.
Create or update master pages	Can create and update master pages.	Cannot create or update master pages.	Cannot create or update master pages.
Trigger Zaps from any booking page	Can trigger Zaps from any booking page if the permission is enabled in the OnceHub permissions section.	Members can only trigger Zaps from booking pages they own.	Can trigger Zaps from any booking page they or team members own if the permission is enabled in the OnceHub permissions section.
Payment integration (Requires an active connection to PayPal)	Can process refunds if the permission is enabled in the permissions section.	Can process refunds if the permission is enabled in the permissions section.	Can process refunds if the permission is enabled in the permissions section.
Booking calendar	Administrator	Member	Team manager

Changing user permissions
By default, all admin users can create and manage booking calendars, chatbots, and routing forms. If an admin has allowed member users to create and manage chatbots and routing forms, members will be able to do this as well. Admins can turn this permission on or off by selecting the gear icon/profile picture in the top right corner of any page **→ Settings and permissions → Member permissions → Click the checkbox.**

With this setting enabled, member users will be able to create and manage chatbots and routing forms.

Booking calendar lobby	Can view all booking calendars in the account, despite the page owner.	Can only view booking calendars which they have created.	Can view all booking calendars that are hosted by themselves or team members.
Create new booking calendars	Can create new booking calendars.	Can create new booking calendars, but only with themselves as host.	Can create new booking calendars for themselves and/or team members.
Edit booking calendars	Can view and edit any booking calendars on their account.	Can only edit booking calendars of which they are the only host.	Can edit booking calendars which they or a team member host.
Delete booking calendars	Can delete any booking calendar on their account.	Can only delete booking calendars which they are the only host of.	Can only delete booking calendars which they or a team member are the only host of.
Assign hosts	Can assign any team members as the host of any booking calendar.	Can only assign themselves as host of a booking calendar.	Can assign themselves or team members as hosts of booking calendars.
Chatbots	Administrator	Member	Team manager
Create new chatbots	Can create new chatbots and assign any users on the account as hosts.	Requires permission from administrator in order to access the chatbots builder. They can only add booking calendars of which they are the only host to the chatbot.	Can create new chatbots for themselves or team members.
Chatbots lobby	Can view all chatbots in the account, despite the chatbot owner.	Can only view chatbots which they have created or which they have been made the host of by the admin.	Can view all chatbots owned by themselves or team members.
Edit chatbots	Can edit, duplicate, rename, and delete all chatbots in the account.	Can only edit chatbots which they have created.	Can edit, duplicate, rename, and delete all chatbots owned by themselves or team members.
Publishing	Can publish any chatbots on the account.	Can only publish chatbots of which they are the only host.	Can publish chatbots owned by themselves or team members.

Delete chatbots	Can delete any chatbots in the account.	Can only delete chatbots which they have made themselves.	Can delete any chatbots owned by themselves or team members.
Routing forms	Administrator	Member	Team manager
Create new routing forms	Can create new routing forms and assign any users on the account as hosts.	Requires permission from administrator in order to access the routing forms builder. They can only add booking calendars of which they are the only host to the routing form.	Can create new routing forms for themselves or team members.
Routing forms lobby	Can view all forms in the account, despite the routing form owner.	Can only view routing forms which they have created or which they have been made the host of by the admin.	Can view all routing forms owned by themselves or team members.
Edit routing forms	Can edit, duplicate, rename, and delete all routing forms in the account.	Can only edit routing forms which they have created.	Can edit, duplicate, rename, and delete all routing forms owned by themselves or team members.
Publishing	Can publish any routing forms on the account.	Can only publish routing forms of which they are the only host.	Can publish routing forms owned by themselves or team members.
Delete routing forms	Can delete any routing forms in the account.	Can only delete routing forms which they have made themselves.	Can delete any routing forms owned by themselves or team members.

User management and seats

Last Modified on Sep 26, 2024

In order for a user to enjoy full functionality of a OnceHub feature, they must be assigned a seat. For instance, a licensed user of scheduled meetings can be defined as owner of an enabled booking page in OnceHub and receive bookings.

Please note they can still use all other functionality in OnceHub and within all products without a seat.

As your team changes, you can add or remove seats as you need them.

User management

Introduction to user management

OnceHub is a true multi-user system, designed to meet the scheduling needs of large and small organizations.

To manage users in your account, in the top navigation menu, click the gear icon → **Users**.

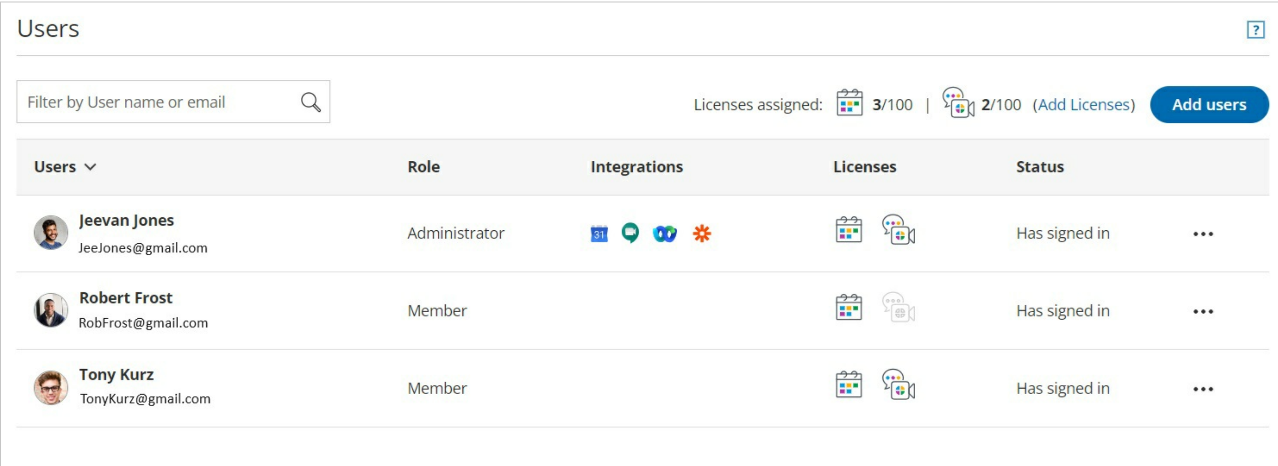


Figure 1: Users lobby

User types

You can create three types of users: administrators, team managers, and members. Here's a summary, but you can learn more about the differences in this article.

- Administrator: The administrator has complete access to nearly all functions and data in the OnceHub account. They manage users, account settings, access permissions, and more; they can also use all of the OnceHub tools.
- Team manager: The team manager plays a role somewhere in between an administrator and member: They have access to most functionalities in the account, with restricted access to sensitive areas like customer data. Once they are assigned a team, they can create scheduling pages on behalf of their team members, as well as edit aspects of their team members' profile and scheduling settings.
- Member: A member has limited access to the account settings and data, but can control most of their own profile settings. Usually, they can only create scheduling tools for their own use, and not for other members in the team.

Once you've created the user, you can determine whether or not they need a seat.

Managing users

As a OnceHub administrator, you can perform various actions to manage users in your OnceHub Account:

- Add new users: administrators can invite new users to join their organization's OnceHub Account. New users will receive an email invitation with a sign-in link. New users can be administrators or members.
- Edit existing users: You can edit the personal details of other users and assign or unassign seats from their profile. You can also edit email notification settings, date and time settings, and product-specific settings for all users in the OnceHub Account.
- Delete users: You can delete any users with an assigned seat, apart from the last administrator with an assigned seat.

  When you have a paid subscription, at least one seat must be assigned to an administrator.

Note:

When deleting a user, all booking pages owned by the user will automatically be transferred to the remaining OnceHub administrator.

When unassigning a scheduled meetings user seat, all booking pages owned by the user will automatically be disabled.

Adding users

OnceHub is a multi-user system, designed to meet the scheduling needs of large and small organizations. All OnceHub products share centralized user management, permissions, and security settings in your account.

You must be a OnceHub administrator to add new users.

1. Sign in to your OnceHub account.
2. In the top navigation bar, click the gear icon → **Users**.

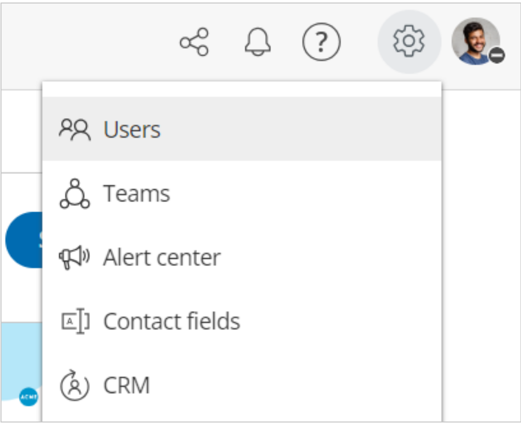


Figure 1: Users page

3. In the Users lobby, click the **Add Users** button (Figure 2).

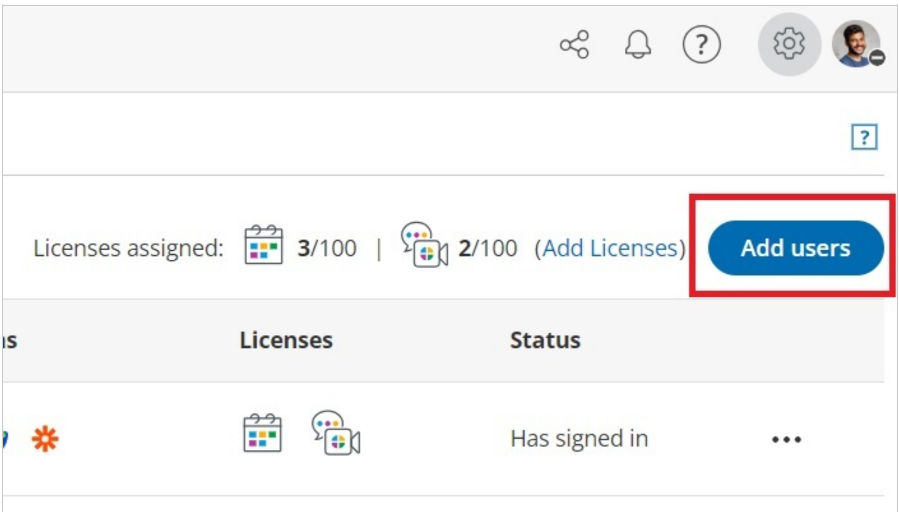


Figure 2: Add users

4. In the **Add Users** pop-up (Figure 3), type the new user's email address. This is the email address to which the invitation will be sent. The selected email address will also be used by the user to sign in.

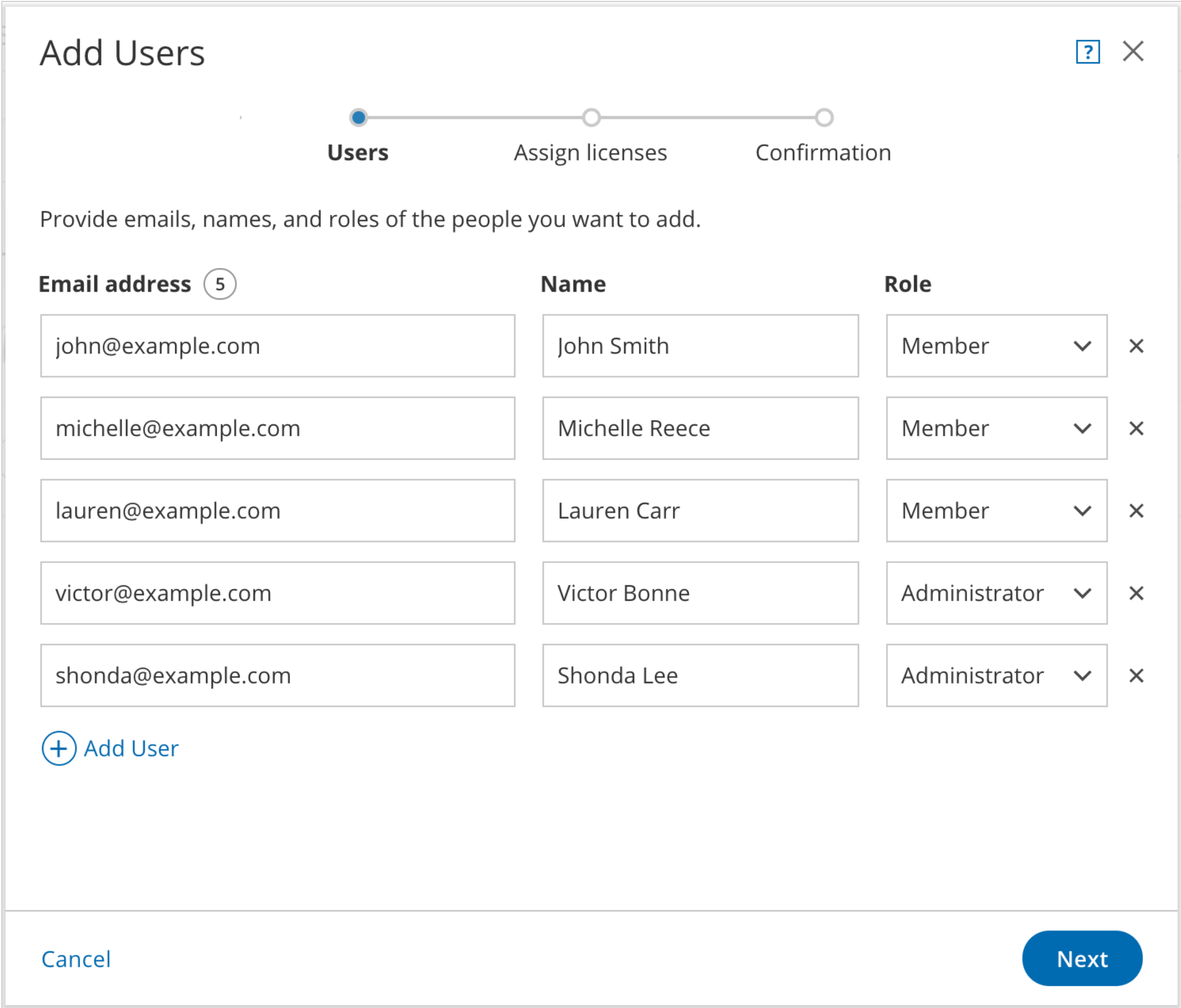


Figure 3: Add Users

5. Add the user's name. Include their first and last names.

6. Select the **User role**: administrator, team manager, or member. Note that the user's role can always be updated by clicking on the user's profile in the Users tab.

7. Add any additional users through the same method by clicking the **+ Add User** link below the email address field.

8. Click **Next**.

9. Select which users need to be assigned a seat. Once you're satisfied with the assignment, click **Next**. Note that if you don't have any available seats, you can skip this step.

10. In the **Resource pools and teams** step, select any resource pools and/or teams you want this user to be a part of. Note that if the user/s have been assigned as team managers, they will be the team managers of those teams.

11. Review the Confirmation page (Figure 4), which specifies how many users you'll be adding and how many seats you'll be assigning..

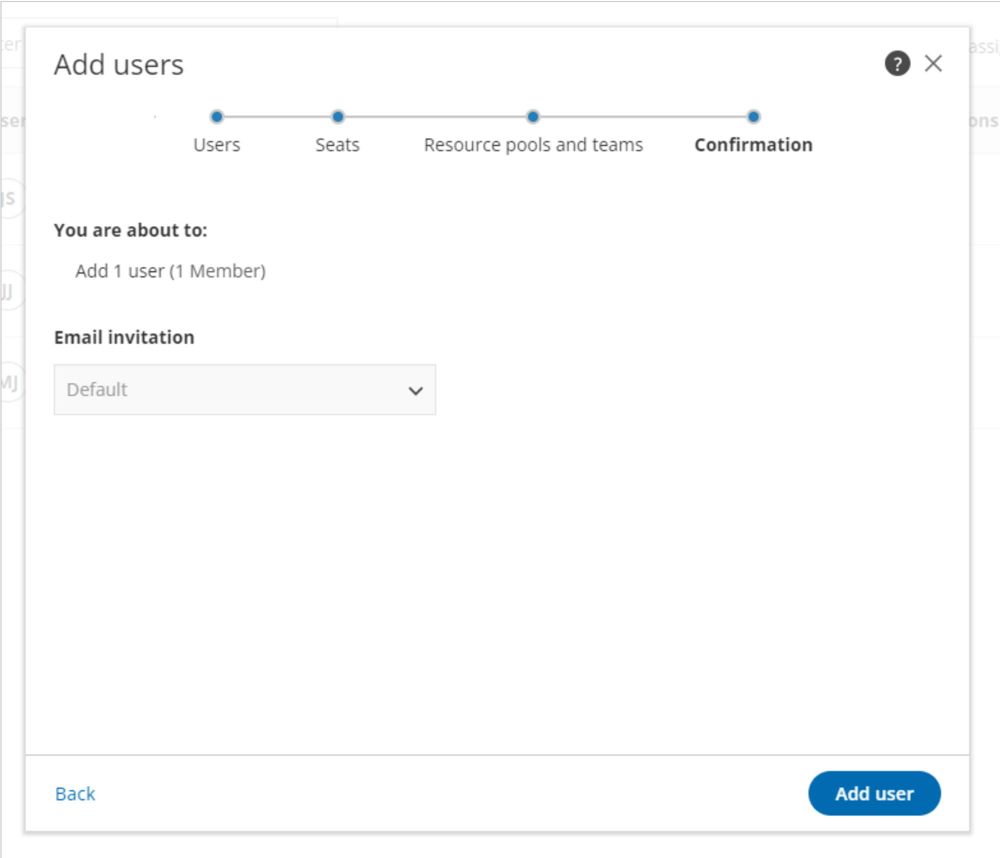


Figure 4: Confirmation

If you've customized an email invitation template in the Notification templates editor, you can select the custom template of your choice in the dropdown. You can either create your own invitation template from scratch, or you can simply tweak the default template by changing the wording a bit, adding a logo and changing anything else you wish to.

If you haven't customized a template, this option will be greyed out and OnceHub will send the invite using the default template.

1. To adjust your users or their seat assignment, click **Back**. If you'd like to proceed with adding the user(s), click **Add Users**.
2. OnceHub sends an email invitation to the invited user(s). When a new user clicks the invitation link in the email, they will be taken to the OnceHub sign-in page where they can set their own password. They must click the invitation link within 24 hours or it will expire. The admin can resend the email invitation by clicking Resend invitation next to the user's name on the users page. This will reset the 24-hour expiration period.

Note:

Whenever you add a new user, OnceHub creates a Booking page for them. In the lefthand icon menu, you can click on the Booking pages icon to configure this further.

Editing other user profiles

Each user has a user profile that contains their details and the personal settings for their account. Only OnceHub administrators can edit all other user profiles, and team managers can edit aspects of only the users who are part of their team. Learn more about the differences among administrators, team managers, and member users.

1. Sign in to your OnceHub account.
2. In the top navigation menu, click the gear icon → **Users**. The users lobby will open.
3. Click on the user whose profile you would like to access.
    - To find a specific user, type their name into the **Filter by user name** box.
    - You can also sort users by name, role or assigned seats by clicking the arrow next to any of the fields.
4. The user's profile will open (Figure 2). As an administrator, you can:

- You can edit the personal details of other users. (Note that team managers can edit parts of their team members' profiles.)
- You can assign or unassign seats from their profile.
- You can edit email notification settings, date and time settings, and product-specific settings for all users in the OnceHub Account.
- You can change their role to administrator, team manager, or member user. (When you make someone a team manager, you will be prompted to select the team/s they will be the manager of)

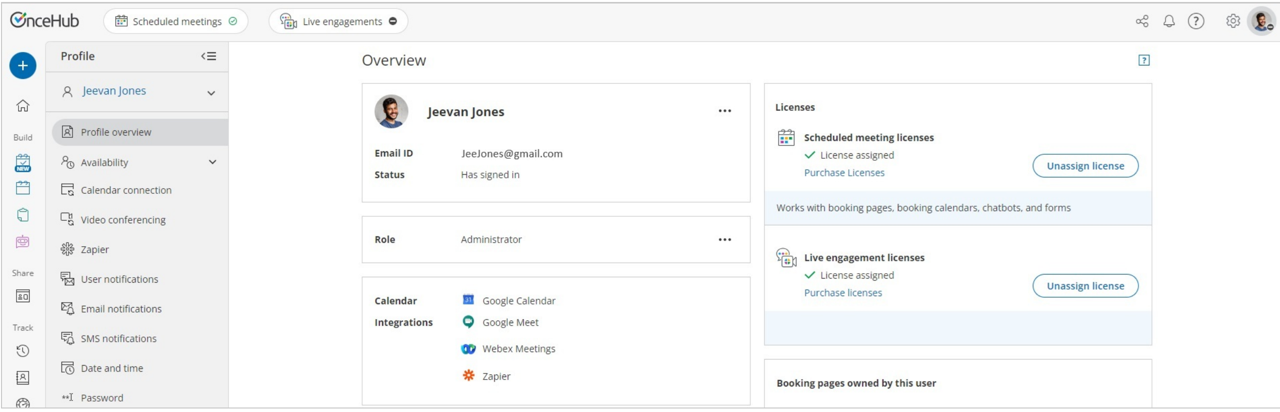


Figure 2: User Overview page

Deleting users

This section explains how to delete users from your account. Only OnceHub administrators can delete users.

Before you delete, you should consider keeping that user in your account and just unassign their seat. So long as you retain a paid subscription, your organization can have unlimited users without a seat assigned, at no additional cost.

You also won't need to delete their booking pages. When you unassign a scheduled meetings seat, any owned pages will be disabled automatically. You can keep an unlimited number of disabled booking pages for later use, without needing to recreate and reconfigure them once you're ready to enable them again.

1. In the top navigation menu, click on the gear icon → **Users**.
2. Click the action menu (three dots) next to the relevant user record and select **Delete User profile** (Figure 1) from the drop-down.
   - To find a specific user, type their name into the **Filter by User name** box. This is useful if you have a large number of users in your account.
   - You can also sort users by name, role or assigned seats by clicking the arrow next to any of the fields.

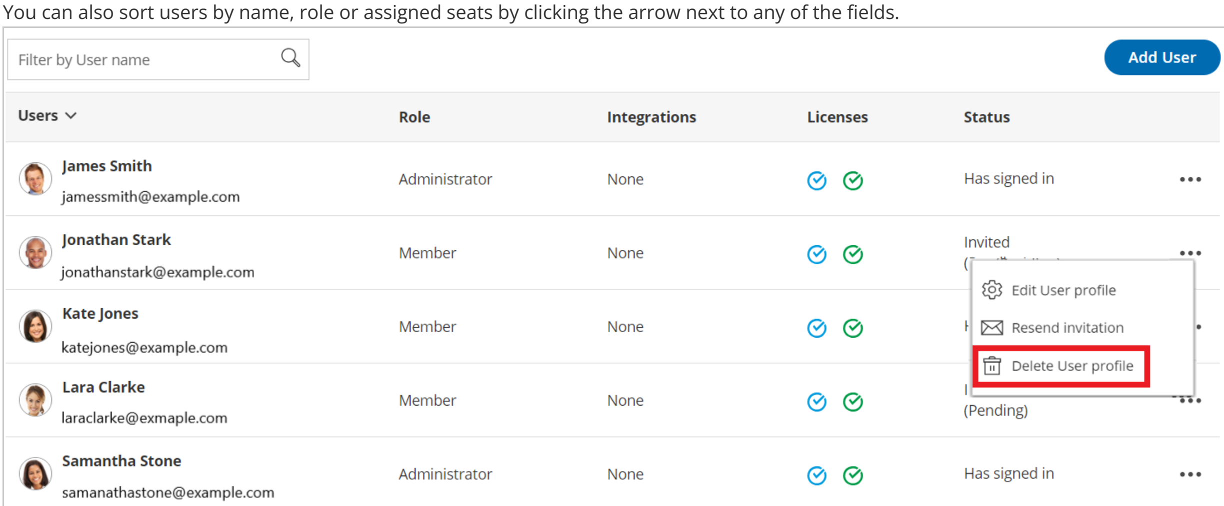


Figure 1: Users lobby

3. The User will be deleted.
   - When you have an paid subscription, at least one seat must be assigned to a OnceHub administrator. You cannot delete a user if they are

the only administrator with a seat.

4. Upon deletion, an email notification will be sent to the deleted user and all OnceHub administrators. The user seat of the deleted user is now unassigned, and available to be assigned to another user.

> **Note:**
>
> When the deleted user is the Owner of at least one Booking page, all Booking pages will be automatically transferred to a remaining administrator with a scheduled meetings seat upon deletion.

Seat management

Assigning seats to users

In order for a user to enjoy full functionality of a OnceHub feature, they must be assigned a seat. For instance, a licensed scheduled meeting user can be defined as Owner of an enabled Booking page and receive bookings.

Please note they can still use all other functionality in OnceHub and within all products without a seat.

You're able to assign a seat when you first add a user to your account.

If you already added them as a user, you can assign a seat to them in the **Overview** section of their profile.

To assign a seat, you must be a OnceHub administrator.

Assign a seat to one user

1. In the top navigation menu, click on the gear icon → **Users**.
2. Add a new user or select the specific user that you would like to assign a seat to.
3. In the **Profile overview** section of the selected user's profile, you can see the following information:
    - If the user has been assigned a seat or not.
    - How many seats you have in your account.
    - How many seats from the pool have been assigned.
    - How many seats are still available to be assigned.
4. Click the **Assign seats** button beneath the relevant product. If a seat is available, it will be automatically assigned to the user.
5. Once a user has been assigned a seat, they will be able to enjoy full functionality for the assigned product.

Assign seat to multiple users at once

1. In the top navigation menu, click on the gear icon → **Billing** → **Seats**.
2. Next to the relevant seat, click the three-dot menu and select **Assign seats**.
3. Select the specific users that you would like to assign a seat to.
4. Click the **Assign seat** button.
5. Once a user has been assigned a seat, they will be able to enjoy full functionality for the assigned product.

> **Note:**
>
> If you have a monthly subscription and you've already assigned all seats to other users, you can purchase a single seat as part of the seat assignment process.
>
> When you click the **Assign seats** button, a pop-up will appear asking if you would like to purchase and assign a new seat. When you click the **Purchase and assign seats** button, the seat is immediately assigned to the user and automatically added to your OnceHub subscription.
>
> - You won't pay for this seat immediately. On your next billing date, you will pay a prorated amount for the seat you've just added. The prorated amount will be added to your next recurring invoice.
> - Once a user has been assigned a seat, they will be able to begin scheduling.

Unassigning user seats

You can unassign a seat from a user at any time. Seats can be unassigned in the **Overview** section of each user's profile.

When you unassign a user seats from a user, they will lose some functionality. However, they will retain access and a significant amount of functionality. For instance, any user who has not been assigned a scheduled meetings seat can do everything their role (member or administrator) allows them to do, except book appointments through an enabled Booking page.

Your organization can have unlimited users without a product seat assigned. This allows for a streamlined, cohesive process across your team. Everyone can access OnceHub to fulfill their role without extra cost, whether as a tech admin, virtual assistant, security admin, or more.

Effects of unassigning a seat

To unassign seats, you must be a OnceHub administrator.

- When you have an active subscription, at least one user seat must be assigned to a OnceHub administrator in order to keep the subscription active. If there is only one OnceHub administrator with an assigned user seat, their seat cannot be unassigned.
- If you unassign a scheduled meeting seat from a user who is the owner of at least one booking page, all of their booking pages will be disabled. If you'd like to keep the booking page(s) enabled for another user, we recommend changing the ownership of associated Booking page(s) before unassigning a seat.

Unassign seat for one user

1. In the top navigation menu, click on the gear icon → **Users**.
2. Select the specific user that you would like to unassign a seat from.
3. In the **Overview** section of the user's profile, click the **Unassign seat** button underneath the relevant product.
4. The seat will be unassigned and the user will no longer have full features provided by that seat. The seat is added back to the pool and is available to be assigned to another user.

Unassign seats for multiple users at once

1. In the top navigation menu, click on the gear icon → **Billing → Seats**.
2. Next to the relevant seat, click the three-dot menu and select **Remove seat**.
3. Select the relevant users and confirm by selecting the **Remove seats** button.
4. The seat will be unassigned and the user will no longer have full features provided by that seat. The seat is added back to the pool and is available to be assigned to another user.

Common use cases for users without a seat

Any user who has not been assigned a seat can still enjoy broad functionality of that product. Your organization can have as many users without seats assigned as you need, at no additional cost.

There are many advantages to retaining multiple users without assigned seats in your OnceHub account. This article reviews the primary use cases.

Settings access

Configuring your account

You can designate one or more team members to act as technical admins by creating an administrator user for them. They can access OnceHub and configure settings, preparing them for users who will later be assigned a seat and take bookings or live chat conversations.

Updating settings

The same technical admins can stay in the account to update settings later and/or add more users when necessary. This type of user is usually an administrator user.

You can also provide a user profile to assistants, who will be able to update your date-specific availability, contact info, social media links, and other public-facing content. This type of user is usually a member user, without access to billing or advanced organizational settings.

Maintaining CRM connection

An administrator must stay connected to Salesforce or Infusionsoft to maintain the account's connection with the CRM. However, this administrator does not need an assigned seat.

Subscribing to notifications

You may have team members who don't take bookings or live chat conversations but want to stay up-to-date on activity relevant to their team. This could be a manager, assistant, or collaborator.

You can assign them as an Editor of a specific Booking page. This access allows them to subscribe to email and SMS notifications for all bookings scheduled through that Booking page.

Seasonal bookings or live chat conversations

If a team member only takes bookings or live chat conversations seasonally and you wish to recycle their seat, reassigning it to someone else, you can do so without deleting their Booking page or user profile.

Once you unassign their seat, you can assign that seat to someone else. For bookings, you can reassign that Booking page's ownership to another user (by default, OnceHub automatically disables any Booking pages they own when you unassign their seat).

For seasonal scheduled meetings users, the original user's Booking page(s) and user profile will stay in your account, ready for when you need to enable them again. If the user is reassigned a seat, and they've stayed the owner of their Booking page(s), there's no need for the administrator to update the Booking page ownership again. The page will simply be ready for them to enable and start receiving bookings again.

Example of seasonal bookings

A recruiter needs to arrange for hiring interviews between candidates and hiring managers. A specific hiring manager may receive bookings temporarily, while she is hiring a specific position. Once she fills that position, a OnceHub admin can unassign her scheduled meetings seat. She won't be able to receive bookings for interviews any longer.

However, her Booking page and user profile will stay, keeping all her configured settings and connected integrations (such as a calendar). When she has a new position open for candidates, the OnceHub admin can reassign her a scheduled meetings seat and re-enable her page, so she can take interview bookings again. They won't have to reconfigure her Booking page or user profile and she won't have to reconnect any integrations.

Activity stream and reporting access

If you have a manager, assistant, or collaborator who needs to manage activity and/or access reports, you can create an administrator user profile for them.

When they log in, they will see the Activity stream. The Activity stream is the central hub where you can manage all of your booking, conversation, and payment activities. The Activity stream provides advanced filtering options to give you quick access to the information you require.

As an administrator, they will have access to OnceHub reports. They can view, customize, and export reports to analyze booking trends.

Billing access

Provide an administrator user profile for your finance team member to manage the account billing. They can log in, pay for the account, keep track of invoicing, add seats, receive billing notifications, and update payment details.

Security and privacy compliance

If you have security and privacy managers, you can create an administrator user profile for them.

Security managers can define relevant security settings, such as password policies, session policies, account lockout policies, and more.

Privacy managers will have access to delete activities in the Activity stream, keeping you in compliance with data privacy law.

If relevant to your organization, privacy managers can act as your Data Protection Officer and/or EU Representative according to GDPR standards, ensuring compliance in your OnceHub account.

Branding your look and feel

If you want a designer on your team to help define and/or configure the custom branding for your Booking pages' custom themes and notification templates, you can create an Administrator user profile for them. They can upgrade the look and feel on your pages and notifications to match your organization, keeping your customer experience consistent and professional.

Someone with coding knowledge for emails can update your custom templates using HTML.

Adding seats

To add seats, select the gear icon in the top navigation menu → **Billing** → **Seats** → **Add seats**.

When you add seats:

- They are immediately available for you to assign to users in your account.
- You will only pay for them on your next billing date.

On your next billing date, you'll pay:

- A prorated adjustment for the seats added during the current billing cycle.
- The full amount for the total number of seats in your account.

Adding seats to a monthly subscription

You can add seats to your monthly subscription at any time.

In order for a user to enjoy full functionality of a OnceHub product, they must be assigned a seat. For instance, a user with a scheduled meetings seat can be defined as owner of an enabled Booking page in OnceHub and receive bookings.

Please note they can still use all other functionality in OnceHub and within all products without a seats.

As your team grows, you can add as many seats as you need. Seats can be added at any time.

When you add seats to a monthly subscription:

- They are immediately available for you to assign to users in your account.
- You will only pay for them on your next billing date.

On your next billing date, you'll pay:

- A prorated adjustment for the seats added during the current billing cycle.
- The full amount for the total number of seats in your account for the upcoming month.

You can also add seats while assigning a seats to a User in their profile.

How the prorated adjustment works

You pay a prorated adjustment for any seats that you add during a billing cycle. This amount is only due on your **next** billing date. This means that you can add seats during your billing cycle without making multiple payments and receiving additional invoices.

For example, let's say you already have 20 seats in your account and your billing cycle starts on the 20th of every month. If you add 10 seats to your account during current your billing cycle, they will immediately be available for you to use, but you won't pay for them immediately (Figure 1).

On your next billing date, you will pay a prorated amount for the 10 seats you added during the billing cycle, plus the full amount for the 30 seats in your account for the upcoming month. On the following billing date, if you don't add any more seats, you will only pay the full amount for the 30 seats in your account for the upcoming month.

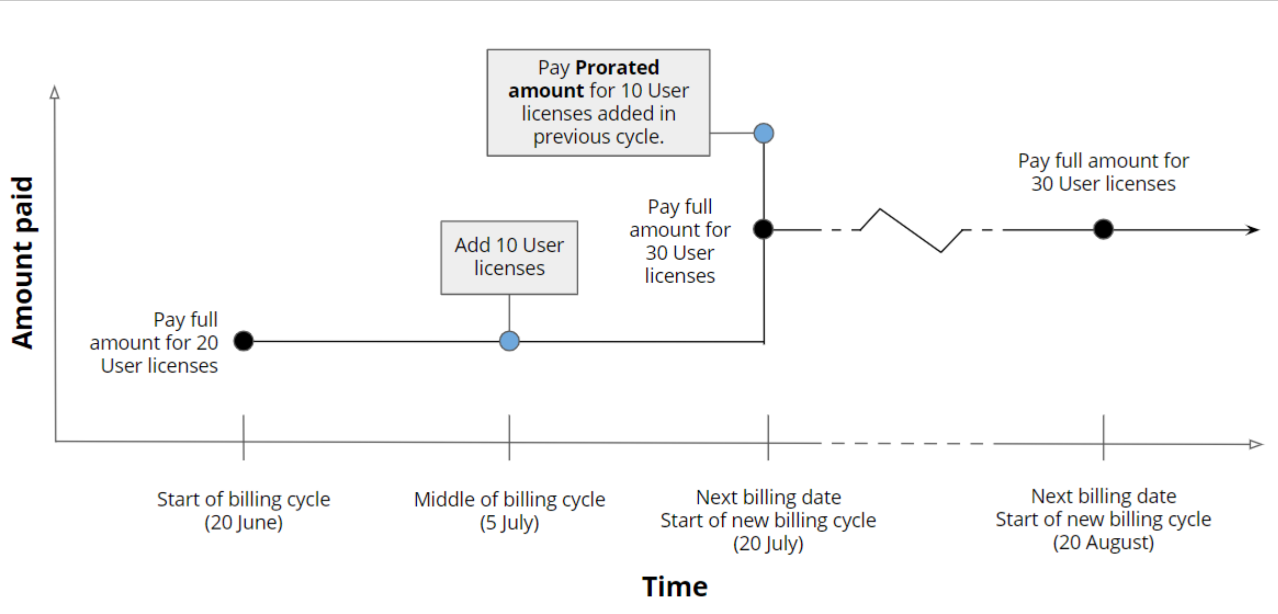


Figure 1: Prorated adjustment

> **Note:**
>
> The billing date and time for your recurring payment cycle will be the exact date and time when you purchased your first seat. All billing dates and times are based on UTC (Coordinated Universal Time).

Your recurring billing date does not change when you add additional product seats.

For complete transparency, advanced billing notifications are sent seven days prior to payment. You can cancel any time you wish. For more information, select **Billing → Billing Notifications**

Adding seats to an annual subscription

In order for a user to enjoy full functionality of OnceHub, they must be assigned a seats for the feature they want to use. For instance, a licensed user of scheduled meetings can be defined as owner of an enabled booking page in OnceHub and receive bookings.

Please note they can still use all other functionality in OnceHub and within all products without a seat.

As your team grows, you can add as many seats as you need. Seats can be added at any time.

Adding product seats

When you add seats:

- They are immediately available for you to assign to users in your account.
- You are immediately charged a prorated adjustment for the seats you've just added.

On your next billing date, you'll pay:

- The full amount for the total number of seats in your account.

How the prorated adjustment works

You pay a prorated adjustment for any seats that you add during the billing cycle. This amount is due at the time of purchase and is based on the number of days until your next billing date. On your next billing date, you'll pay the full amount for all seats in your account.

For example, let's say you already have 20 seats in your account and your billing cycle starts on the 1st of January every year. If you add 10 seats to your account at any time during your billing cycle, they will instantly be available for you to use, and you will pay a prorated amount for them immediately (Figure 1).

On your next billing date, you'll pay the full amount for the 30 seats in your account for the upcoming year. On the following billing date, if you don't add any more seats, you will only pay the full amount for the 30 seats in your account for the upcoming year.

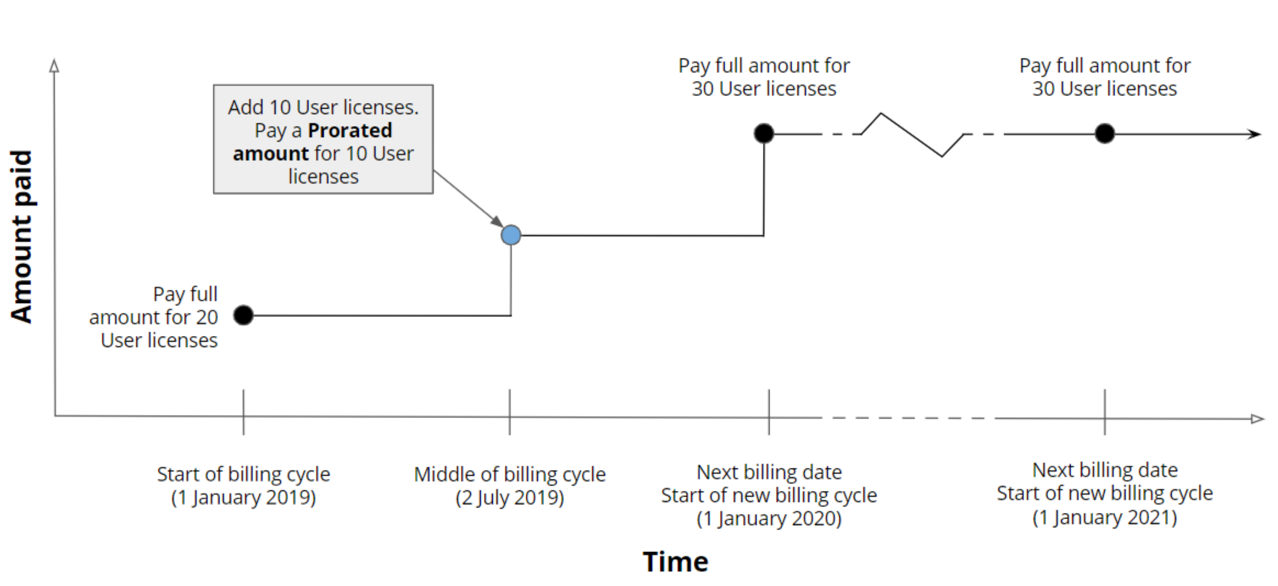


Figure 1: Prorated adjustment

Note:

The billing date and time for your recurring payment cycle will be the exact date and time when you purchased your first seats. All billing dates and times are based on UTC (Coordinated Universal Time).

Your recurring billing date does not change when you add additional seats.

For complete transparency, advanced billing notifications are sent seven days prior to payment. You can cancel any time you wish. For more information, select **Billing → Billing Notifications**

How to purchase and add product seats

To purchase product seats, you must be a OnceHub administrator.

1. Click the **Add seats** button next to the feature you would like to purchase seats for.
2. In the **Add seats** page, select the number of additional seats you'd like to purchase.
3. The **Next payment** box is updated based on the number of seats you add. Your next payment includes:
    - **Prorated adjustment:** Payment for seats added during the current billing cycle. To see more information about the prorated adjustment, click **View details**.
    - **Seats:** Payment for seats to be used in the upcoming billing cycle.
4. Once you've added all the seats you need, click **Update subscription.**
    - The seats you've just purchased are automatically added to your existing subscription and are immediately available for you to assign to users.
    - The prorated adjustment and additional seats will be added to your next invoice.

Note:

You can also purchase single seats directly from a user's profile as you need them.

How to add product seats

1. Click the **Add seats** button next to the product you would like to purchase seats for.
2. In the **Add seats** page, select the number of additional seats you'd like to purchase.
3. The **Order summary** box is updated based on the number of product seats you add.
    - **Prorated adjustment:** Payment for seats added during the current billing cycle. To see more information about the Prorated adjustment, click **View details**.

The prorated adjustment is charged to your primary payment method immediately at the time of purchase.

- **Future recurring payments:** Payment due on your next billing date and future billing dates.

4. Once you've added all the seats you need, click **Proceed to payment.**
5. On the **Secure payment** screen, select the Payment method you want to use. You can either pay with an existing payment method, or click **use a new payment method** to pay with a different payment method.
   By default, your primary payment method is selected.
6. Click **Submit payment.**

   - The product seats you've just purchased are automatically added to your existing subscription and are immediately available for you to assign to users.
   - You are immediately charged for the additional seats.
   - You'll receive an invoice for the seats you've just added.
   - The transaction is recorded in the **Billing → Transactions** tab.

Another method to add seats is to select the gear icon in the top navigation menu → **Billing** → **Seats**.

Removing seats

When you remove seats from your subscription, they are still available for use until the end of your current billing cycle. This is because you've already paid for all your seats in advance, at the beginning of the current billing cycle.

For example, let's say your billing cycle starts on the 20th of every month and you already have 15 seats in your account. You remove 5 seats from your account during your billing cycle. You will still have access to these seats until the next billing date. On this date, the seats will be removed from your account and you will only pay for 10 seats for the upcoming month.

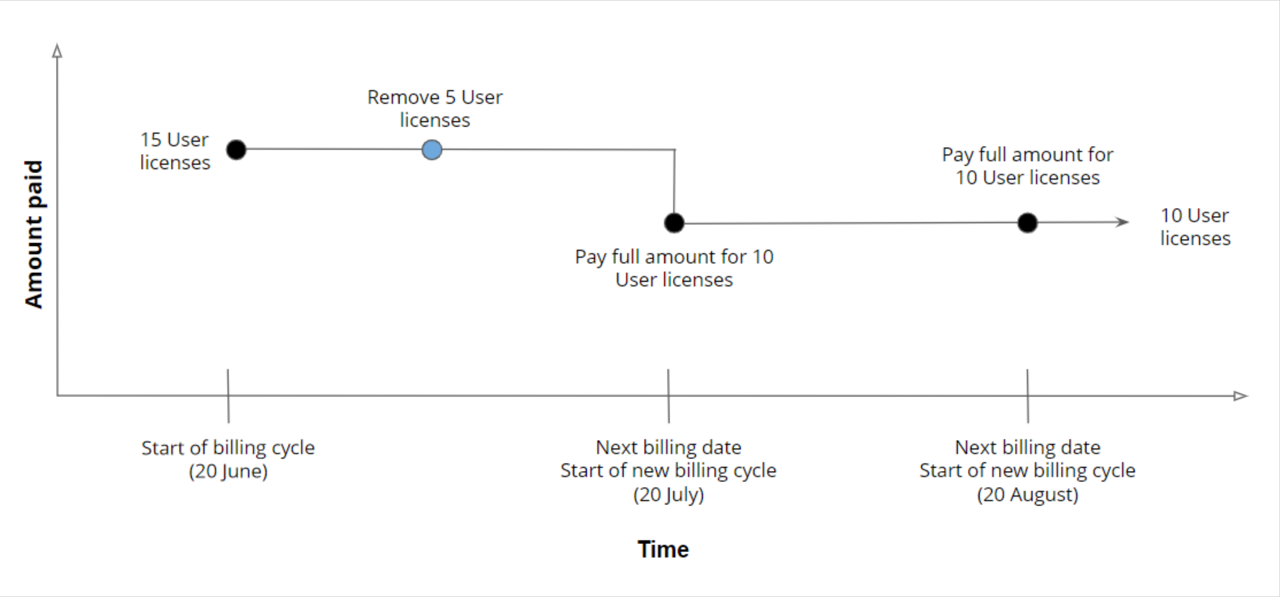


Figure 1: Removing seats

We recommend unassigning seats before removing them. Otherwise, OnceHub will randomly remove seats on the next recurring billing date.

Note:

You cannot purchase additional seats while a seats removal is pending. If you change your mind about removing product seats, you can cancel a pending removal at any time before the next billing date.

You can remove product seats by selecting the gear icon in the top navigation menu → **Billing→ Seats**.

You must be a OnceHub administrator to remove product seats.

1. In the **Seats** page, click **Remove seats**.
2. In the **Remove seats** page, select the number of product seats you want to remove. The **Next payment** box is updated with the amount due on the next billing date, based on the number of seats you remove. Your next payment includes only the payment for seats to be used in the upcoming billing cycle.

3. Click **Update subscription** to save your changes.

The seats will be removed from your account at the end of your current billing cycle and can still be used in the application until then.

> **Note:**
>
> If you want to cancel your subscription and remove all seats from your OnceHub account, you'll need to delete your account. Learn more about deleting your OnceHub Account

Does my user need an assigned seat?

When you create a new user, you assign that user an account role: member or administrator. This determines their access levels, including for billing, advanced configuration, and reporting.

Next, you can determine whether you should assign them a seat.

The only difference between users with and without a **scheduled meeting** seat is that those with a seat can accept appointments through an enabled Booking page. Similarly, users with a **live engagement** seat can participate in live chat conversations and instant calls.

Users without a seat can do everything else in the account those with a seat can do, according to their account role (member or administrator).

With a paid subscription, you can create as many users as your organization needs at no additional cost. However, you have a finite amount of seats to assign them, according to your subscription. This allows you to create unlimited users for your organization at no additional cost who can support your account through various roles.

Users with a seat

Any users can receive bookings after you assign them a scheduled meeting seat.

Once you've assigned them a scheduled meeting seat, you can make them an owner of an enabled booking page and they can receive bookings through it.

Similarly, any users can participate in live chat conversations after you assign them a live chat seat.

Users without a seat

Any user who has not been assigned a scheduled meeting seat can do everything their role (member or administrator) allows them to do, except book appointments through an enabled Booking page or participate in live chat conversations.

Your organization can have unlimited users without a seat assigned.

This allows for a streamlined, cohesive process across your team. Everyone can access OnceHub to fulfill their role without extra cost, whether as a tech admin, virtual assistant, security admin, or more.

Seasonal users

Seasonal users are sometimes assigned a seat and sometimes not, according to their organization's needs.

If a team member only takes bookings or participates in live engagements seasonally and you wish to recycle their seat, reassigning it to someone else, you can do so without deleting their Booking page or user profile.

Once you unassign their scheduled meeting seat, their Booking pages will be disabled automatically. You can then assign ownership of those Booking pages to someone else and re-enable the page. Alternatively, you can keep the page disabled, to be used in future, when it becomes relevant again.

The original user's Booking page and user profile will stay in your account, ready for when you need to enable them again.

Calendar integrations overview

Last Modified on Sep 26, 2024

To access your calendar connection options, go to your profile settings by clicking the profile picture at the top right → **User integrations**.

OnceHub works best when connected with your personal calendar.

OnceHub communicates with your personal calendar in real time. All the information collected during the scheduling process is accessible directly from your connected calendar, and you can block your availability in multiple configurations, ensuring you're never double-booked.

OnceHub integrates with your existing calendar setup, so that you don't have to change how you already manage your time.

Important:

Regardless of how you connect, your calendar information is always kept private. Calendar appointments and free/busy patterns are never revealed to customers.

Calendar connection options

For each of your OnceHub booking pages or booking calendars, you can select the calendar that bookings will be created in, the calendars that busy time will be retrieved from, and any additional calendars you want to create an event in when a booking is made.

The following calendar connection options are available in OnceHub:

Google Calendar connection

Any Google Calendar can connect to OnceHub, whether you use a Gmail Calendar or a G Suite Calendar.

Learn more about connecting OnceHub to your Google Calendar.

Google Meet integration

All users connected to Google Calendar can use Google Meet video conferencing automatically, with no further integration required.

Learn more about the OnceHub connector for Google Meet.

Google Calendar connection FAQs and Troubleshooting

Read our Google Calendar connection FAQs and Troubleshooting article for answers to common questions about the OnceHub integration with Google Calendar.

Microsoft 365 (Office 365) Calendar connection

Privacy and security

When you connect OnceHub to your Microsoft 365 Calendar, all credentials and data traffic are fully encrypted. The integration uses the permissions users already have when viewing calendars (for example: only free/busy), so no new information will be accessible to them.

Automatic connection with Microsoft Teams

If your Microsoft 365 account includes Microsoft Teams, you'll be connected to it as soon as you connect your Microsoft 365 Calendar. Learn more

Microsoft 365 Calendar connection FAQs and Troubleshooting

Read our Microsoft 365 Calendar via OAuth 2.0 connection FAQs for answers to common questions about the OnceHub integrations with Microsoft 365 Calendar.

Exchange/Outlook Calendar connection

Connecting and configuring your Exchange/Outlook Calendar

Microsoft Exchange is a server that manages mailboxes, contacts, calendars and more. Exchange users never access Exchange directly, but rather access through an email client. This can be an Outlook client on a PC or Mac, a mobile device, or web access via the browser. OnceHub integrates directly with Exchange, allowing you to keep using whichever calendar access method you're currently using.

For each of your OnceHub booking pages, you can select the calendar that bookings will be created in, the calendars that busy time will be retrieved from, and any additional calendars you want to create an event in when a booking is made.

Learn more about connecting OnceHub to your Exchange/Outlook Calendar

Privacy and security

When you connect OnceHub to your Exchange/Outlook Calendar, all credentials and data traffic are fully encrypted. The integration is based on EWS (Exchange Web Services), a well-established official Microsoft protocol. The integration uses the permissions users already have when viewing calendars (for example: only free/busy), so no new information will be accessible to them.

Learn more about how your sign-in credentials are stored and protected by OnceHub

Exchange/Outlook Calendar connection FAQs and Troubleshooting

Read our Exchange/Outlook Calendar connection FAQs for answers to common questions about the OnceHub integration with Exchange/Outlook Calendar.

iCloud Calendar connection

Privacy and security

When you connect OnceHub to your iCloud Calendar, all credentials and data traffic are fully encrypted. Your calendar information is always kept private and free/busy patterns are never revealed to customers.

iCloud Calendar connection FAQs and Troubleshooting

Read our iCloud Calendar connection FAQs for answers to common questions about the OnceHub integrations with iCloud Calendar.

Differences when working with or without a connected calendar

While you can use OnceHub without a connected calendar and still accept bookings from customers, it is recommended that you connect your personal calendar to OnceHub.

When you have a personal calendar connected, you will be able to keep track of your time more effectively, as busy time from outside of OnceHub-specific bookings will be recognized as unavailable to OnceHub. Without your personal calendar connected, time that you haven't manually blocked off in your booking pages can be used as available in OnceHub. Furthermore, when working without a personal calendar connected, you will have to access the OnceHub activity stream to check bookings; with a connected calendar, you would receive a meeting link.

Disconnecting a calendar

Last Modified on Aug 23, 2024

After you've connected your calendar, you might want to disconnect the calendar so that you can connect a new calendar or work without a connected calendar. If you think that you might connect the same calendar later, or if you are experiencing any issues, contact OnceHub support before disconnecting.

In this article, you'll learn how to disconnect a calendar and learn about the effects of calendar disconnection.

Disconnecting your calendar

1. select your profile picture or initials in the top right-hand corner → **Profile settings** → **Calendar connection**.
2. Next, click the **Disconnect** link next to your email address (Figure 1).

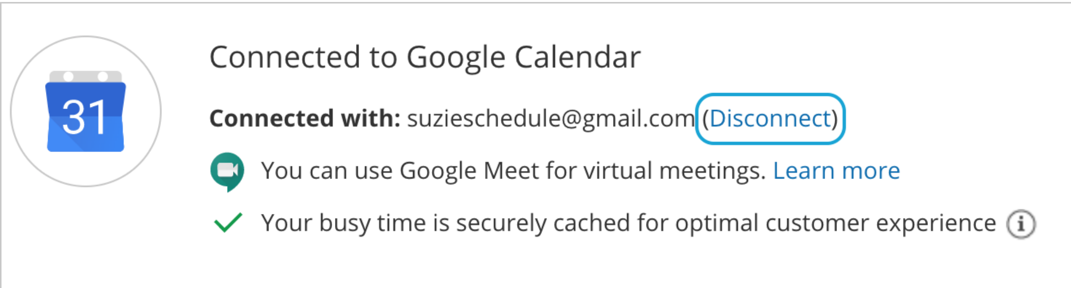


Figure 1: Disconnect your calendar

3. The **Calendar disconnection** pop-up will appear (Figure 2). Select one of the three options and click the **Disconnect** button.

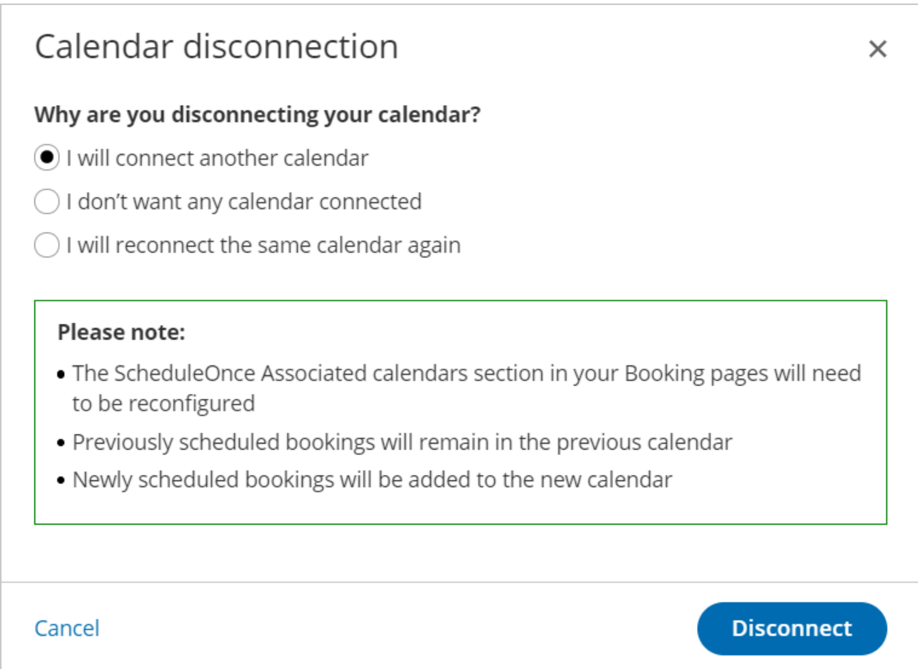


Figure 2: Calendar disconnection pop-up

Calendar disconnection effects

Depending on which of the three options you choose from the pop-up, there will be some changes to the functionality of the OnceHub products that were connected to this calendar.

Scenario	OnceHub
I will connect another calendar	All your Booking pages will need their calendar settings reconfigured. Existing bookings will remain in the previous calendar, but will not be updated if canceled or rescheduled. Existing bookings that have not taken place yet will **not** be added to the new calendar. New bookings will be added to the new calendar from now on.
I don't want any calendar connected	Busy time will not be retrieved from any calendar. New bookings will not be added to a calendar. Existing bookings will remain in the previous calendar, but will not be updated if canceled or rescheduled.
I will reconnect the same calendar again	Reconnecting the same calendar is **NOT RECOMMENDED** without consulting OnceHub support. All of your booking pages will need their calendar settings reconfigured. The **associated calendars** section of each of your booking pages will reset to default. For all calendar types (except Microsoft 365, see below), calendar events for existing bookings won't be updated if they are cancelled or rescheduled. **For Microsoft 365:** The connection between OnceHub bookings and your Microsoft 365 calendar events will be retained if you disconnect and reconnect the same calendar. Existing OnceHub bookings will be updated in your calendar after reconnection if they are cancelled or rescheduled.

Important:

You should not revoke access to OnceHub from within the settings of your connected calendar. This will be regarded as a connection error and will prevent you from accepting bookings and scheduling meetings.

If you need to disconnect your calendar, please make sure to do it in your OnceHub Account.

FAQs and Troubleshooting

Last Modified on Sep 17, 2024

Here are some frequently-asked questions concerning the integration of your personal calendar into OnceHub.

Calendar connection and use FAQs

Using your calendar's busy time

When you connect OnceHub to your personal calendar account, OnceHub is able to read any calendar in that account to see when you're already busy. You can tell OnceHub to block any time when you're busy on your calendar. No-one will be able to book a meeting with you at a time when there is already an event on your calendar.

To see which calendar is connected to your account, select your profile picture or initials in the top right-hand corner → **Profile settings** → **Calendar connection**.

Busy time terminology

Different calendar integrations have different terminology for referring to busy time. For instance, the Google Calendar integration shows events as either "Free" or "Busy". In comparison, Microsoft 365 Calendar and Exchange/Outlook Calendar have many more settings for showing the status of an event. These include "Free", "Tentative", "Out of Office", and more.

- Learn more about busy time in Google Calendar
- Learn more about busy time in the Office 365 Calendar
- Learn more about busy time in Exchange/Outlook Calendar
- Learn more about busy time in iCloud Calendar

Busy time retrieval

After you've connected your calendar, you can specify which calendar or calendars should be used for retrieving busy time.

Busy time in OnceHub

When you connect your calendar account, OnceHub is able to read the calendar to see when you're already busy. Busy events are factored into any buffers you set between OnceHub scheduled events and busy time on your calendar.

Each Booking page can have its own calendar configuration, retrieving busy time and bookings in whichever calendars you specify. To access these settings, hover over the lefthand menu and go to the Booking pages icon → **Booking pages** → your Booking page → **Associated calendars**. Busy time is automatically retrieved from your main booking calendar. You can also retrieve busy time from any other calendars in your connected account, so long as you select them within this section.

> **Tip:**
>
> If your Booking page is not showing any available time slots, or is showing available slots when you're busy,

you can learn about how to resolve these issues in our troubleshooting articles.

Google Calendar

How does OnceHub connect with Google Calendar?

OnceHub communicates with the Google Calendar API using a token that is generated by Google. Your sign-in credentials are never revealed during the connection process and are never stored by OnceHub. . Once a connection is established, OnceHub reads or writes to Google Calendar in real time and no data from Google Calendar is ever saved on our servers.

Can I connect to a Google Calendar that is not related to my login ID?

You can connect to any Google Calendar, regardless of the login ID that you are using to sign in to OnceHub.

Can I create a Google Calendar account that does not use a Gmail email address?

You can create a Google Calendar account on any email address. Learn more about creating a Google Calendar for your non-Gmail email address

I cannot connect - what should I do?

This may be due to temporary communication problems with the Google Calendar API. Please try the following:

1. Make sure cookies are enabled on your browser
2. Verify that you can log in to your G Suite account
3. Try to connect again from OnceHub. select your profile picture or initials in the top right-hand corner → **Profile settings** → **Calendar connection**. Click the **Renew your connection** button.

If you're still having problems, please contact us and we will be happy to assist you.

Can I connect Google Meet?

Yes, if you have enabled Google Meet in your Google Account, you can automatically use Google Meet for video conferencing sessions in OnceHub. Once you connect your Google Calendar, Google Meet will also be connected.

Learn more about the Google Meet integration

Can I use Google Meet for video meetings but connect a calendar that isn't Google Calendar?

Google Meet is available only when you connect your Google Calendar. Please contact us and we can discuss your options.

Can I connect to my G Suite Calendar?

Yes, there is no difference between connecting to a G Suite Calendar and connecting to a Gmail-based Google Calendar.

Do you support G Suite resource calendars?

G Suite resource calendars are fully supported.

I'm already connected with one Google calendar. How do I switch to another?

The simplest way to switch is to disconnect your calendar and reconnect to a new one. To disconnect, click on your profile image or initials in the top right corner and select **Calendar connection**. Next, disconnect and connect to another account. Learn more about connecting your Google Calendar.

Can I cancel and reschedule in Google Calendar?

This is only supported for OnceHub. The OnceHub integration with Google Calendar can be set up to allow you to cancel or reschedule directly in your connected calendar, while all bookings remain updated in OnceHub.

How is my availability retrieved?

When you connect your Google Calendar account, OnceHub is able to read the calendar to see when you are already busy.

- Any events labeled "Busy" on your calendar will be considered unavailable time. Busy time on your calendar will restrict the time slot options that you are able to choose from when accepting bookings from your customers, scheduling a meeting, or when sending an invitation.
- Events labelled "Available" or "Free" will be considered as available time for meetings.

Learn more about busy time in Google Calendar

Can I disable the Google Calendar invite that is sent to my customers?

In OnceHub, you can disable the Google Calendar invite email. When your Booking page is associated with Event types, the Customer notifications section is located on the Event type. When your Booking Page is not associated with Event types, this section is located on the Booking page .

Learn more about the location of the Customer notifications section

Once you've accessed the **Customer notifications** section, uncheck the box that sends the Google Calendar invite email. Learn more about the Google Calendar invite

Why do my busy times appear in wrong hours?

This is due to time zone differences between the Account time zone in your Google Calendar and the time zone on your Booking page. To change the time zone:

- **In OnceHub:** Go to the Overview section in your Booking page, select the new time zone and save.
- **In Google Calendar:** Click on **Settings -> Calendar settings**. At the top of the Google Calendar page, select the new time zone and save.

Reload/refresh the OnceHub page to reflect the change.

Can I reassign a booking in Google Calendar?

No, this is not currently supported. If you wish to reassign a booking, you must do it through OnceHub. If both the original Booking owner and the Reassigned booking owner are connected to Google Calendar, the booking details will be automatically updated in Google Calendar.

What happens in Google Calendar if I reassign a booking from OnceHub?

If both the original and new Booking owner have connected their OnceHub accounts to their Google Calendar accounts, when you reassign a booking it will automatically be updated in Google Calendar. The event will be removed from the original Booking owner's calendar and will be added to the Reassigned Booking owner's calendar. The Customer will not be informed of the reassignment, ensuring a smooth Customer experience. Learn more about Booking reassignment

Exchange/Outlook

OnceHub communicates with your Exchange/Outlook Calendar in real time using an encrypted Exchange Web Services (EWS) connection, a well-established official Microsoft protocol. All credentials and data traffic are fully encrypted.

What does Exchange integration mean?

Exchange is a server that manages mailboxes, contacts, calendars and more. Exchange users never access Exchange directly, but rather through an email client. This can be an Outlook client on a PC or Mac, a mobile device, or web access via the browser. OnceHub integrates directly with Exchange while you keep using whichever calendar access method you're currently using.

Establishing a connection FAQs

How do I connect my Exchange/Outlook Calendar?

1. Select your profile picture or initials in the top right-hand corner → **Profile settings** → **Calendar connection**. If you are switching connections, you must disconnect from your previous connection first.
2. Click the **Connect** button next to Exchange/Outlook Calendar and provide your credentials.

> **Note:**
>
> Microsoft does not support Transport Layer Security (TLS) below TLS version 1.2. Learn more about how Exchange/Outlook Calendar uses TLS

Learn more about connecting to Exchange/Outlook Calendar

I already have a calendar connected. How do I switch to another?

Your account can only be connected to one calendar at a time. If you want to switch from one calendar to another, or from one connection method to another, you will need to disconnect the previous one and then connect the new one.

Select your profile picture or initials in the top right-hand corner → **Profile settings** → **Calendar connection**. Click the **Disconnect** link and then connect to another calendar or connection method. Learn more about disconnecting a calendar

I cannot connect - what should I do?

See our step-by-step connection guide or our troubleshooting guide.

Connection characteristics FAQs

How does OnceHub connect with Exchange/Outlook Calendar?

OnceHub communicates with your Exchange/Outlook Calendar using the Exchange Web Services (EWS) API, a well-established official Microsoft protocol. All credentials and data traffic are fully encrypted. The integration uses the permissions Users already have when viewing calendars (for example, only free/busy), so no new information will be accessible to them.

Learn more about Exchange/Outlook integration security

> **Note:**
>
> OnceHub does not support Microsoft ActiveSync connections at this time.

How are my credentials stored?

When you enter your credentials to connect OnceHub to your Exchange/Outlook Calendar, your password is encrypted with AES-256 (Advanced Encryption Standard) and stored in our cloud database.

Learn more about how sign-in credentials are stored and protected by OnceHub

Which Exchange versions are supported?

Most Exchange versions are supported: Exchange Online (hosted) and On-premises Exchange (versions 2007, 2010, 2013, and 2016).

> **Important:**
>
> Please note that Office 365 support for EWS is **not** supported.

Can OnceHub connect with shared calendars or resources (rooms)?

Your default calendar, sub-calendars (folders) and shared calendars are supported.

Resource calendars are supported if you are connected via OAuth 2.0 or our PC connector, if the resource calendar is shared with full read/write permissions. Learn more about using Exchange/Outlook resource calendars

What happens if my password changes?

If your Outlook password is changed, you must reconnect with the new password to restore the connection. Learn more about resolving connection issues

What happens if there's an issue with the connection?

During a connection failure, Booking pages cannot accept bookings. This measure is taken to prevent the possibility of double bookings.

To enable bookings, you must either restore the connection by reconnecting, or disconnect your calendar by clicking the **Disconnect** link and then reconnect again. Learn more about disconnecting a calendar

Working with Exchange/Outlook Calendar FAQs

Can I disable the Exchange/Outlook Calendar invite that is sent to my Customers?

You can disable the Exchange/Outlook Calendar invite email by hovering over the left-hand menu and going to the Booking pages icon → Event types → your Event type →Customer notifications and uncheck the box that sends the Exchange/Outlook Calendar invite email.

> **Note:**

The **Customer notifications** section will be on the Event type if the Booking page is associated with at least one Event type. If the Booking page is not associated with any Event types, the section is in the Booking page settings instead.

I cannot see my scheduled meeting in my Exchange/Outlook Calendar

In your Exchange/Outlook Calendar, make sure that the calendar in which your meeting was scheduled is selected. Find it in the calendar list in the left bar and click it to select it.

You can also select the activity in the Activity stream, then click the action menu (three dots) in the right-hand pane and select **View Calendar event** (Figure 1).

Figure 1: View Calendar event

There is a time offset between my calendar and OnceHub

This might be due to time zone differences between the account time zone in your Exchange/Outlook account and the time zone on your Booking page. To change the time zone:

In OnceHub: Go to the Time zone subsection in the Overview section on your Booking page, select the new time zone and click **Save**.

In Exchange: Go to the settings in your calendar (Outlook, browser or other email client) to update the time zone. Reload/refresh the OnceHub page to reflect the change.

Can I set default Exchange/Outlook Calendar reminders when events are created via OnceHub?

Yes, you can configure default Exchange/Outlook Calendar reminders in the connected Exchange/Outlook Calendar. Go to your OnceHub Account and click **Profile** in the left sidebar. Click on **Calendar connection** and use the **Default Exchange/Outlook Calendar reminders** drop-down menu to select the value that you want.

Figure 2: Default Exchange/Outlook Calendar reminders

Can I update OnceHub scheduled meetings in my connected Exchange/Outlook Calendar?

Yes, when you are connected to Exchange/Outlook Calendar, you can select whether changes made to OnceHub events in your connected calendar are reflected in OnceHub.

When a OnceHub scheduled event is deleted in your Exchange/Outlook Calendar, it will cancel the booking in OnceHub. When a OnceHub scheduled event is moved in your Exchange/Outlook Calendar, the booking will be rescheduled in OnceHub. Learn more about cancel and reschedule from within your Exchange/Outlook Calendar

iCloud

Connecting to your iCloud Calendar

1. Select your profile picture or initials in the top right-hand corner → **Profile settings** → **Calendar connection**. If you are switching connections, you must disconnect from your previous connection first.
2. Click the **Connect** button next to **iCloud Calendar**.
3. The **Connect to iCloud Calendar** pop-up will open. Enter your Apple ID and app-specific password and click **Connect**.

Learn more about connecting to iCloud Calendar

Most common questions

How does OnceHub connect with iCloud Calendar?

OnceHub communicates with your iCloud Calendar using the CalDav protocol. When you enter your credentials to connect OnceHub to your iCloud Calendar, your password is encrypted with AES-256 (Advanced Encryption Standard) and stored in our cloud database.

Learn more about how sign-in credentials are stored and protected by OnceHub

What is busy time caching?

To ensure fast performance, we employ a caching mechanism for the busy times in your connected iCloud Calendar.

Can OnceHub connect with shared iCloud Calendars?

OnceHub can access an additional calendar that is not part of your iCloud account if the owner of that calendar has shared it with you. Learn more about sharing calendars in iCloud Calendar

How do I create an iCloud app-specific password for OnceHub?

Apple requires users to use app-specific passwords for all third-party applications such as OnceHub. An app-specific password is a single-use password for your Apple ID that lets OnceHub securely access the information you store in your iCloud calendar. To create an app-specific password, follow these steps:

1. Sign in to your Apple ID account page.
2. Click **Settings**.
3. Under **Apple ID**, click **Manage**.
4. In the **Security** section, turn on Apple two-factor authentication if it is not on already. On older devices, use Apple two-step verification instead.
5. Under **App-Specific Passwords**, click **Generate Password**.
6. Enter a password label (for example, "OnceHub").
7. Click **Create**.
8. Once the app-specific password is generated, copy it.

You can now use your new app-specific password to connect OnceHub to your iCloud Calendar.

What happens if my Apple ID password changes?

If you change your primary Apple ID password, all your existing iCloud app-specific passwords are automatically revoked, and must be generated again. You will need to reconnect your OnceHub account using a new app-specific password.

Learn more about iCloud app-specific passwords

Can I set Default iCloud Calendar reminders when events are created via OnceHub?

Yes, you can configure Default iCloud Calendar reminders in the connected iCloud Calendar.

Select your profile picture or initials in the top right-hand corner → **Profile settings** → **Calendar connection** and use the **Default iCloud Calendar reminders** drop-down menu to select the value that you want (Figure 1).

Figure 1: Default iCloud Calendar reminders

Can I disable the iCloud Calendar invite that is sent to my Customers?

In Booking pages, you can disable the iCloud Calendar invite email by hovering over the lefthand menu and selecting the Booking pages icon → Event types → your Event type→ **Customer notifications** and unchecking the box that sends the iCloud Calendar invite email.

> **Note:**
>
> The **Customer notifications** section will be on the Event type if the Booking page is associated with at least one Event type. If your Booking page is not associated with any Event types, this section will be in the Booking page settings instead.

I cannot see my scheduled meeting in iCloud Calendar

In your iCloud Calendar, make sure that the calendar in which your meeting was scheduled is selected. Find it in the calendar list in the left bar and click it to select it.

You can also select the activity in the OnceHub Activity stream, then click the action menu (three dots) in the right-hand pane and select **View Calendar event** (Figure 2).

Figure 2: View Calendar event

Why do my busy times appear in wrong time slots?

This might be due to time zone differences between the account time zone in your iCloud account and the time zone on your Booking page. To change the time zone:

In OnceHub: Go to the Overview section of your Booking page and edit the page's time zone.

In iCloud: Sign into your iCloud account and click **Settings**. Under **Time Zone/Formats**, click on the currently selected time zone. The **Time Zone & Formats** pop-up will appear. You can then select a time zone on the map, or click the time zone name below the map and select a time zone from the menu. Finally, click **Done**.

Learn more about busy time in iCloud Calendar

I'm already connected with one iCloud account. How do I switch to another?

Your account can only be connected to one calendar at a time. If you want to switch from one iCloud account to another, you will need to disconnect the previous one and then connect the new one.

Disconnect your calendar by going to your OnceHub Account, select your profile picture or initials in the top right-hand corner → **Profile settings** → **Calendar connection**. Disconnect your iCloud account and reconnect with the new iCloud account.

> **Note:**
>
> You can switch your calendar connection accounts without having to switch your OnceHub Account.

I cannot connect - what should I do?

This may be due to temporary communication problems with the iCloud API. Please try the following options:

1. Make sure you're using an iCloud app-specific password.

2. Make sure cookies are enabled on your browser.
3. Verify that you can login to your iCloud account.
4. Try to connect again from OnceHub.

Learn more about troubleshooting iCloud Calendar connection issues

If you’re still seeing issues, please contact us and we'll be happy to assist you.

Microsoft 365 (Office 365)

Office 365 Calendar connection with OAuth 2.0 FAQs

OnceHub communicates with your Office 365 Calendar in real time using using an OAuth 2.0 connection.

Read on to find answers to some of the most common questions related to your Office 365 Calendar via OAuth 2.0 connection.

Connecting to your Office 365 Calendar via OAuth 2.0

1. Select your profile picture or initials in the top right-hand corner → **Profile settings** → **Calendar connection**.
2. If you are switching connections, you must disconnect from your previous connection first.
3. Click the **Connect** button next to **Office 365 Calendar via OAuth**.
4. A pop-up window will appear asking you to choose an account to connect to OnceHub. Select the correct account and confirm the connection.
5. Click **Accept** to give OnceHub permission to access your calendars.

Learn more about connecting to Office 365 Calendar via OAuth 2.0

Most common questions

Which Office 365 edition is required to connect with OnceHub?

To be able to connect OnceHub to your Office 365 Calendar, you must have a calendar in Outlook on the web for business (Outlook Web App), which is provided with Exchange Online. Learn more about which Office 365 edition is required

Will I be connected to Microsoft Teams for video meetings as well?

Yes, if your Office 365 account includes Microsoft Teams, you'll be connected automatically when you connect your Office 365 Calendar via OAuth 2.0. Learn more

Can I disable the Office 365 Calendar invite that is sent to my Customers?

You can disable the Office 365 Calendar invite email by hovering over the lefthand menu and selecting the Booking pages icon → Event types → your Event type → Customer notifications and unchecking the box that sends the Office 365 Calendar invite email.

Note The **Customer notifications** section will be on the Event type if the Booking page is associated with at least one Event type. If a Booking page is not associated with any Event types, the section will be in the Booking page settings instead.

How does OnceHub connect with Office 365 Calendar?

When you connect your Office 365 Calendar to OnceHub via OAuth 2.0, OnceHub communicates with the Office 365 REST API (v2.0) and Microsoft Graph API using a token that is generated by Microsoft. Your sign-in credentials are never revealed during the connection process and are never stored by OnceHub. Once a connection is established, OnceHub reads or writes to your Office 365 Calendar in real time.

What is busy time caching?

To ensure fast performance, we employ a caching mechanism for the busy times in your connected Office 365 Calendar. It is turned on by default. We recommend you keep caching enabled unless a OnceHub team member recommends you disable it.

Can OnceHub connect with shared Office 365 Calendars or resources (Rooms)?

Your default calendar, sub-calendars (folders), and calendars that have been shared with you are supported.

Can I set default Office 365 Calendar reminders when events are created via OnceHub?

Yes, you can configure default Office 365 Calendar reminders in the connected Office 365 Calendar.

Select your profile picture or initials in the top right-hand corner → **Profile settings** → **Calendar connection** and use the **Default Office 365 Calendar reminders** drop-down menu to select the value that you want (Figure 1).

Figure 1: Default Office 365 Calendar reminders

Learn more about configuring your Office 365 Calendar via OAuth 2.0 connection

I cannot see my scheduled meeting in Office 365 Calendar

In your Office 365 Calendar, make sure that the calendar in which your meeting was scheduled is selected. Find it in the calendar list in the left bar and click it to select it.

You can also select the activity in the Activity stream, then click the action menu (three dots) in the right-hand pane and select **View Calendar event** (Figure 2).

Figure 2: View Calendar event

Why do my busy times appear in wrong time slots on my Booking page?

This might be due to time zone differences between the account time zone in your Office 365 account and the time zone on your Booking page. To change the time zone:

- **In OnceHub:** Go to the Overview section of your Booking page and edit the page's time zone.
- **In Office 365:** Click on **Settings -> Options - > Settings -> Regional** and change the time zone. Reload/refresh the OnceHub page to reflect the change.

Learn more about busy time in Office 365 Calendar

I'm already connected with one Office 365 account. How do I switch to another?

Your account can only be connected to one calendar at a time. If you want to switch from one Office 365 Calendar to another, you will need to disconnect the previous one and then connect the new one.

Disconnect your calendar by selecting your profile picture or initials in the top right-hand corner → **Profile settings** → **Calendar connection**. Disconnect your Office 365 account and reconnect with the new Office 365 account.

Learn more about disconnecting a calendar

> **Note:**
>
> You can switch your calendar connection accounts without having to switch your OnceHub Account.

What happens if there's an issue with the connection?

During a connection failure, Booking pages cannot accept bookings. This measure is taken to prevent the possibility of double bookings.

To enable bookings, you must either restore the connection by reconnecting, or disconnect your calendar by clicking the **Disconnect** link and then reconnect again. Learn more about disconnecting a calendar

I cannot connect - what should I do?

This may be due to temporary communication problems with the Office 365 API. Please try the following options:

1. Make sure cookies are enabled on your browser.
2. Verify that you can log in to your Office 365 account.
3. Try to connect again from your OnceHub Account.

Learn more about Office 365 Calendar via OAuth 2.0 connection troubleshooting

If you're still seeing issues, please contact us and we'll be happy to assist you.

Troubleshooting Calendar connection issues

Exchange/Outlook

Testing Exchange connectivity

The Microsoft Remote Connectivity Analyzer is a useful tool for several purposes:

- Determining your EWS URL (if EWS is enabled).
- Verifying that your work email is managed on an Exchange server.
- Verifying Exchange connectivity.

Requirements

To use this tool, you'll need:

1. Your Outlook email address and password.
2. Your Domain\UserName - Enter your email in this field if Domain\UserName are not used in your organization.
   - The domain: This can usually be found in the documentation explaining how to connect a mobile phone or email client to your work mail account.
   - Your user name: This is usually the internal ID with which you log into internal systems.

Testing connectivity

Open Microsoft Remote Connectivity Analyzer and follow these steps:

1. Select the **Synchronization, Notification, Availability, and Automatic Replies** option (Figure 1). *Figure 1: Microsoft Remote Connectivity Analyzer*
2. Fill out (all fields are required): **Email, Password** and **Domain\UserName** (with a backslash). Try your email address if you don't know your Domain\UserName (Figure 2).
3. Check the "**I understand...**" checkbox (Figure 2).
   Figure 2: Enter credentials and click 'I understand...'
4. Complete the verification test and click **Verify** (Figure 3).
   Figure 3: Verify
5. Click the **Perform Test** button (Figure 3).
   Figure 3: Perform test
6. Wait for the results and verify that the connectivity icon is green.
7. Click **Expand All**.
   Figure 4: Connectivity Test results
8. Press **Ctrl + F** keys on your keyboard to open the browser's search box.
9. Type **ewsurl** (one word, no spaces).
10. Copy the **EWS URL**, located between the <EwsUrl> tags, without the tags (Figure 5). *Figure 5: Copy your EWS URL*
11. Go back to your OnceHub Account and paste the EWS URL in the appropriate field in the connection box.

How to determine the EWS URL

Our integration with Exchange/Outlook Calendar requires the address of your Exchange server, called EWS URL (Exchange Web Services URL). This is usually auto-detected using your email address, but sometimes the auto-detection may fail. A common cause of failure is when your Exchange admin disabled auto-detection. In such cases, the first User of the account connecting to Exchange will need to provide the EWS URL. Additional Users of the same account will not need to provide it again.

I cannot access my email account via the browser

The easiest method to obtain the EWS URL is by logging into your mailbox (email account) via the browser. Even if you don't normally do so, but know how to do it, we recommend you try. Once in your mailbox in the browser, copy the server address or the entire URL and paste it into the OnceHub field labeled **EWS URL**.

- An Exchange email server's address may look like this: **mail.server.com**
- The entire URL of your email account may look like this: **https://mail.server.com/owa**
- You can also manually insert your server address into the format **https://mail.server.com/ews/exchange.asmx** — this is your actual EWS URL

Any of these options will work, because OnceHub will format the EWS URL for you in the background. In some rare cases, this method doesn't provide the correct EWS URL. If connection still fails, use this tool instead: Microsoft Remote Connectivity Analyzer

I cannot access my email via the browser

If you cannot access your email account via the browser, use this tool by Microsoft to discover your EWS URL: Microsoft Remote Connectivity Analyzer.

On-premises Exchange admins only

Users with access to PowerShell can obtain the EWS URL directly from the Exchange server. Open PowerShell on the Exchange server and type this command: Get-WebServicesVirtualDirectory |Select name, *url* | fl

None of the above worked

If none of these methods revealed the EWS URL, use our Exchange/Outlook Calendar troubleshooting guide. You may need to contact your internal help desk or IT department.

The OnceHub integration with Exchange/Outlook Calendar works regardless of whether you are using Exchange in cached mode or non-cache mode. The Cached Exchange Mode is the default mode in Outlook and is the recommended option to optimize performance.

The performance of the connector will be affected depending on the mode that you have enabled in Outlook:

- When using the Cached Exchange Mode, a copy of your Exchange/Outlook Calendar is stored on your computer. This copy provides quick access to your data and is frequently synced with the Exchange server. The cached mode is less memory and CPU intensive on both the client-side and the server-side than the non-cached mode, improving performance.
- If you are using Exchange/Outlook Calendar and working in non-cached mode, Outlook is retrieving data from the server on any sync. This means that Outlook and the connection to OnceHub will respond slower than in the Cached mode.

If you are experiencing slow performance in your connection to OnceHub, the first thing to check is that Cached Exchange mode is enabled. Learn more about turning on Cached Exchange/Outlook Calendar Mode

Connect your Google Calendar/Workspace

Last Modified on Dec 27, 2024

Read on if you want to learn how to connect your OnceHub and Google Workspace accounts.

If you want to configure your Google Calendar, learn more here.

Connecting to Google Workspace

1. Select your profile picture or initials in the top right-hand corner → **User integrations**.
2. Select **Google Workspace**, then click the **Connect** button.
3. A pop-up window will appear asking you to choose an account to connect to OnceHub. Select the correct account and confirm the connection.

- Connecting OnceHub to your Google Workspace automatically integrates Google Calendar, Gmail, and Google Meet. Learn more
- Providing permission to connect to Gmail is optional. It allows you to send booking notifications directly from your email address.
- If you're using booking pages, you have the option to configure **OnceHub advanced integration settings**. You can also click the **Continue setup** button in the **What's next** section to access more options in OnceHub.

Once you've connected your calendar, you will see a page which allows you to further customize your calendar connection.

- Click **Disconnect** to remove the connection between OnceHub and your calendar.
- You can toggle **Busy time cache** on or off. Having it on improves page load times for your customers by securely caching the start and end times of your calendar busy time.

Using additional calendars

In the calendar connection page, under the heading **Meetings are copied to**, you can add an additional calendar that bookings will be copied to. Bookings scheduled in the selected booking calendar will be copied to the additional calendar that you select.

Note :

This feature is only available for booking calendar users.

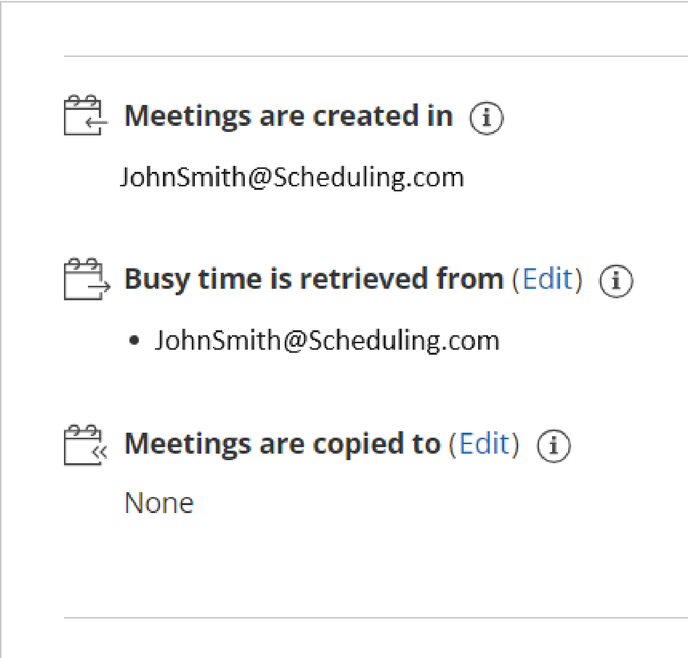


Figure 1: Additional calendar settings

To add an additional calendar:

1. Click your profile icon in the top right corner
2. Click **User integrations → Google Workspace**.
3. Click **Edit** next to the heading **Meetings are copied to**. (Figure 1)
4. In the pop up, from the **Booking calendars** drop-down menu, select the booking calendars you want bookings to be copied from. All booking calendars which you are the host of, or are hosted by a team of which the user is a part, will be displayed here.
5. Next, from the **Copy to** drop-down menu, select the calendar that you want the booking to be copied to. The drop-down menu will display all of the additional calendars that you have created or been added to in your Google profile.
6. When you're done, click **Save** at the bottom of the pop up.
   - To remove a calendar from these settings, click **Edit** and then click the **X** at the end of the row.
7. To add further additional calendars, click **+ Add calendar** in the Edit pop up.

Now meetings scheduled in the selected booking calendars will appear in the additional calendars that you have chosen. Updates to the original meeting, such as a rescheduling, will be updated in the additional calendar.

Creating a Google Calendar account that uses your business email address

Most people think that if you use Google Calendar, you need to use it with a Gmail email address. Fortunately, this is not true. You can create a Google Calendar account on any email address without using G Suite. This is quick and simple and does not require any domain setup whatsoever.

To create a Google Calendar account for a non-Gmail address:

1. Go to https://accounts.google.com/NewAccount and create a Google Account for your business email address or any other email address that you would like the Google Calendar account to use.
2. Immediately after that, go to https://www.google.com/calendar and configure the new calendar. Make sure

that your business email address is showing on the right corner of the Google header.

3. Make sure not to create a Gmail account - create a calendar only.

Sharing Google Calendars

Your OnceHub account connects to a Google Calendar account and allows you to access all calendars under that account.

Below are the different permission levels and their supported calendar configurations:

- **The main calendar in which bookings are created and meetings are scheduled**: This calendar is the owner of the calendar event. You need to ask the calendar owner to share the calendar with full permissions, choosing the option marked "**Make changes AND manage sharing**". Otherwise, you will not have permission to create a calendar event in this calendar.
- **Busy time retrieval or additional booking calendars**: You can retrieve busy time from calendars or add the calendar event to additional calendars as guests. This can be done with sharing at any permission level, even at the lowest permission level of "**See free/busy information"**. This enables people who share their calendar with you to maintain the privacy of their calendars.

Note:

If you need to access additional calendars that are not part of your Google Calendar account, you can ask owners of these Google Calendars to share their calendars with you.

When you want other people to share their Google Calendar with your connected Google Calendar account, they should choose the **Share with specific people** option, enter the email address of your Google Calendar account and select the appropriate permission level.

You will receive an email from Google confirming they have shared it with you. You must click **Add this calendar** in order to access the shared calendar.

Configure your Google Calendar

Last Modified on Jan 7, 2024

You might need to tweak some settings in order for your calendar integration to work the way you want it to.

For example, OnceHub allows you to cancel or reschedule bookings without leaving your personal calendar. By enabling the **OnceHub advanced integration settings**, changes made in your connected calendar are reflected in OnceHub. Read on to learn what settings changes are available and how to make them.

If you want to learn how to connect your Google Calendar, read more here.

Google Calendar quota

Google sets a quota on the number of bookings that can be created in its calendar. As with any Google algorithm, the quota calculations are not revealed and there is no set amount of bookings after which the quota activates. Google does publish some numbers, but we have not seen any correlation between these numbers and when the quota activates.

- We have seen the quota activate with as low as 30 bookings per day when they are all done during a very short timeframe. If your activity is spread out evenly over the day, you may be able to go as high as 150 bookings per day before hitting the quota. Customers who schedule with you will see a message from OnceHub alerting them that bookings cannot be accepted at this time.
- When you hit the Google Calendar quota, you will not be able to accept bookings for any Booking pages attached to that User and Google Calendar account for up to 24 hours. This operates on a rolling 24-hour window, so exactly 24 hours after activity took place, that activity is no longer counted toward the quota.
- This means that if many appointments were booked at 3 PM yesterday, you must wait until 3 PM today for these bookings to no longer count toward the quota. At that time, your customers might be able to book normally again. However, if a number of appointments are immediately created soon after, the quota might be hit again, until the next time the rolling 24-hour window moves past activity made exactly 24 hours previously.

When planning your setup, it is important to consider the following guidelines in order to prevent hitting the Google Calendar quota:

1. **Use Users and not calendar sharing:** If your Google Calendar is connected to OnceHub and you are accepting bookings for people who share their calendar with you, any bookings they receive will be treated by Google as if they were received by your Google Calendar account and will count towards your Google Calendar quota. To avoid this situation, create each team member as a OnceHub User in the system so they can connect their calendar directly.
2. **Split the load when using sub-calendars:** If you are accepting bookings for multiple booking pages by using sub-calendars in your Google Calendar account, you may be getting a large amount of bookings. In this case, you can create another User account in OnceHub and connect it with another Google Calendar account. You can then use pooled availability with automatic assignment to distribute the booking load between the two calendar accounts.

If you have already hit the quota, you have the following options:

1. **Adjust your setup as described above.** If you would like to consult with us on the optimal configuration changes, please contact us.

2. **Disconnect from Google Calendar and work without a connected calendar.** When you work without a connection to Google Calendar, there is no quota and you can accept as many bookings as you like. Learn more about the differences between working with vs working without a connected calendar

Using G Suite

Resource calendars

OnceHub is fully compatible with G Suite resource calendars for both resource scheduling and conditional booking in OnceHub.

Resource calendars are designated specifically for scheduling organizational resources such as conference rooms, projectors, guest offices, equipment, or any other resource that members of your organization might schedule a time to use.

Creating and managing resources using G Suite

1. When creating resources, you should use specific naming conventions to make your resources easy for users to find. Only G Suite administrators in your organization can create resources.
2. To use resources in OnceHub, you can subscribe to the resource calendars.
   - If you are not the administrator of the Google account, the resource calendar will appear under the Other calendars section. Learn more about subscribing to a resource calendar.
   - If you are the administrator of the Google account, the resource calendar will appear in the My Calendars list. You need to share the resource with the appropriate permission level with the users of your organization. If you don't explicitly set the sharing option for your new resource, it will inherit the default sharing option for calendars in your organization.
3. Your OnceHub account connects to a Google Calendar account and allows you to access all calendars under that account. After subscribing to the resource calendars, they will appear automatically in the Calendar list of the Booking page associated calendar section in OnceHub.
   - If you have been granted administrative access to the resource calendars, they will be organized in alphabetical order together with all other calendars in your account. You will be able to select any resource as the Main booking calendar.
   - If you do not have administrative access to the resource calendars, the resources to which you are subscribed will be located at the bottom of your calendars list. You will not be able to select a resource as a Main booking calendar. In this case, you will need to book the resource using the Additional booking calendar column.

User action: Cancel or reschedule in Google Calendar

When you're connected to a Google Calendar, you can select whether changes made in your connected calendar are reflected in OnceHub.

Read on to learn about canceling and rescheduling from your Google Calendar.

Adjusting OnceHub advanced integration settings

Open OnceHub and click on your profile image or initials in the top right corner and select **Calendar connection**.

Under the OnceHub **advanced integration settings** heading, you'll see two toggles (Figure 1). These control how your Google Calendar two-way sync will function. By default, both toggles are set to **OFF**.

Canceling an event in your connected Google Calendar

If you delete a calendar event created by a OnceHub booking while the **Deleting an event in Google Calendar cancels the booking in OnceHub** toggle is set to **ON**, the booking will be automatically canceled in OnceHub. The following actions are performed, as if you (the User) canceled the booking in OnceHub:

- Your Customer receives a cancellation notification.
- The event is deleted from your calendar, and the time is set to available.
- If you are using any other integrations (like CRM, video conferencing, or Zapier) – they are updated with the cancellation.
- If you are using Payment integration, no refund is issued. If your Customer is entitled to a refund, you can refund them manually via OnceHub or via PayPal.

If you delete a calendar event created by a OnceHub booking while the first toggle is set to **OFF**, the booking remains unchanged in OnceHub, no email notifications are sent, and no integrations are updated.

> **Note:**
>
> In cases of Panel meetings, if the Primary team member deletes the calendar event, the booking is automatically canceled in OnceHub for all Panel members. That means for both the Primary team member and all Additional team members.

Rescheduling an event in your connected Google Calendar

The **Changing the time in Google Calendar updates the booking in OnceHub** option determines how OnceHub is updated with the new time of the event. When you move a booking in your connected calendar, you're actually rescheduling on behalf of your Customer. Therefore, the time change must be coordinated with your Customer. No email notifications are sent to you or your Customer.

> **Note:**
>
> The reschedule functionality will only work when events are modified in the same calendar. Modifications in Additional booking calendars are disregarded.

When you move an event in your calendar while the second toggle is set to **ON**, the following actions are performed:

- The OnceHub booking time is updated immediately.
- All reminders are sent on schedule.
- All integrations (CRM, video conferencing, Zapier, and payment) are updated as well.
- The status of future events is changed to "Rescheduled".

If the second toggle is set to **OFF**, the OnceHub booking time is only updated when the next reminder is due, subsequent reminders are sent on schedule and integrations are not updated.

> **Note:**
>
> In cases of a Panel meeting, if the Primary team member moves or delete a booking in their connected

calendar, the booking is automatically rescheduled or canceled for all panel members. That means for both the Primary team member and all Additional team members.

The Customer calendar event

Whether your Customer’s calendar will be updated or not depends on your choice in Google’s **Would you like to send update emails to existing Google Calendar guests** pop-up. Make sure to click the **Send** button, so that your Customer’s calendar is updated. Learn more about the Customer's calendar event

How to disable the Google Meet video in the calendar event

When using OnceHub with a Google Calendar, a hangouts video call is added automatically every time a new Google Calendar event is created in your Google Calendar. Learn more about Google Meet

You can disable this in your Google Calendar. G Suite users require a different method than non-G Suite users.

For non-G Suite Google Accounts

This is relevant for anyone using a Google Account who does not pay Google for their service.

1. After signing into your Google Account, access your Google Calendar settings.

2. Scroll down to Event settings.

3. Deselect **Automatically add Google Meet video conferences to events I create** (see Figure 1).

Figure 1: Deselect the checkbox

For Google Accounts through G Suite

If you want to disable the Google Hangouts video setting in the calendar event, you can ask your Google account Administrator to follow the steps below.

Note:

Only your Google account Administrator can disable or re-enable Google Hangouts video in the calendar event

1. Sign in to the Google Admin console.
2. Click **Apps**.
3. Go to **G Suite → Calendar**.
4. Click **Calendar sharing options** in the gray header link.
5. Under **Video Category**, click to edit the **pencil icon**.
6. Uncheck **Add video** box.

Note:

When the Google Hangouts video call is not enabled by your G Suite account administrator, you can manually click **Add a video call** on the calendar event page every time a Google Calendar event is created.

How to disable your browser's pop-up blocker

When connecting to your Google Calendar account, you might see an alert about the browser's pop-up blocker blocking the Google Calendar connection window. The message might say: *"The window was unable to open, and may have been blocked by a pop-up blocker. Please add this to the list of the sites your pop-up blocker allows to open".*

There are two possible ways in which this can be fixed:

1. Create an exception for https://app.oncehub.com/. This will whitelist OnceHub with your browser and pop-ups from OnceHub will not be blocked.
2. You can disable the pop-up blocker entirely.

The following links provide step-by-step instructions for each browser type:

- Google Chrome
- Mozilla Firefox
- Safari

When are Google events treated as busy in OnceHub?

Read on to learn about the busy time settings in the Google Calendar. To change the busy time settings, you need to update the calendar event details.

Changing busy time settings in Google

1. To change the setting, double-click an event or select **Edit event** in your Google Calendar.
2. Scroll down and search for the **Show me as** setting. The following options are available (See Figure 1):
   - **FREE:** OnceHub will not read this time as busy. This is useful when you want to indicate specific events on your calendar without having those events block your availability.
   - **BUSY:** OnceHub reads this time as busy and blocks availability.

Note:

All-day events in Google Calendar are set to Free by default. Regular events are set to Busy by default.

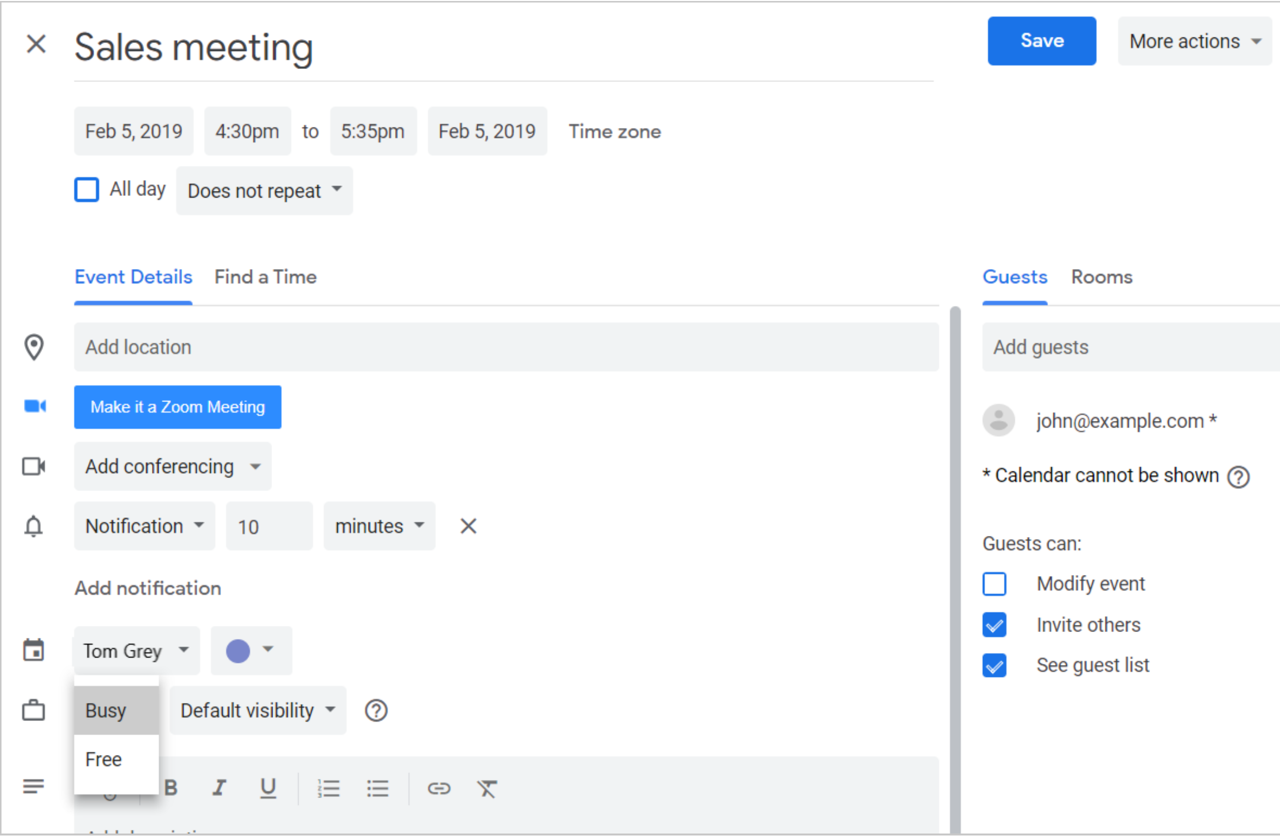


Figure 1: Google calendar event

How to disable the Google Meet video in the calendar event

Last Modified on Apr 5, 2023

When using OnceHub with a Google Calendar, a hangouts video call is added automatically every time a new Google Calendar event is created in your Google Calendar. Learn more about Google Meet

You can disable this in your Google Calendar. G Suite users require a different method than non-G Suite users.

For non-G Suite Google Accounts

This is relevant for anyone using a Google Account who does not pay Google for their service.

1. After signing into your Google Account, access your Google Calendar settings.

2. Scroll down to Event settings.

3. Deselect **Automatically add Google Meet video conferences to events I create** (see Figure 1).

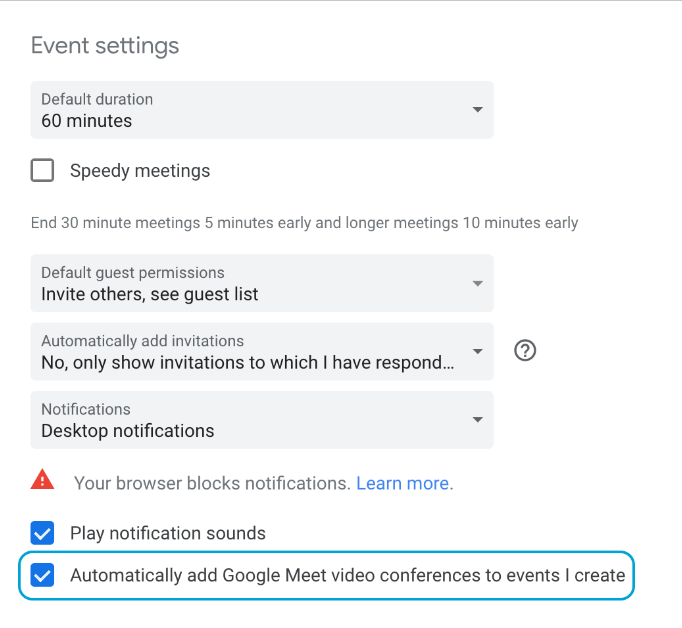


Figure 1: Deselect the checkbox

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Note:

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1. Sign in to the Google Admin console.
2. Click **Apps**.
3. Go to **G Suite -> Calendar**.
4. Click **Calendar sharing options** in the gray header link.
5. Under **Video Category**, click to edit the **pencil icon**.
6. Uncheck **Add video** box.

Note:

When the Google Hangouts video call is not enabled by your G Suite account administrator, you can manually click **Add a video call** on the calendar event page every time a Google Calendar event is created.

Connect your Microsoft 365 (Office 365) Calendar

Last Modified on Sep 26, 2024

Read on if you want to learn how to connect your OnceHub Account with your Microsoft 365 Calendar.

If you want to configure your Microsoft 365 Calendar, learn more here.

To be able to connect OnceHub to your Microsoft 365 Calendar, you must have a calendar in Outlook on the web for business, which is provided with Exchange Online. Exchange Online is available as a standalone service, or you can get it as part of an Microsoft 365 plan.

Important:

If you go for a Microsoft 365 plan, make sure to get **Microsoft 365 Business Essentials** or **Microsoft 365 Business Premium**. Note that Microsoft 365 Business does not come with Exchange Online.

Verifying your account compatibility

The easiest way to verify that you have an appropriate account is by logging into your Microsoft 365 account and clicking **All apps** (Figure 1).

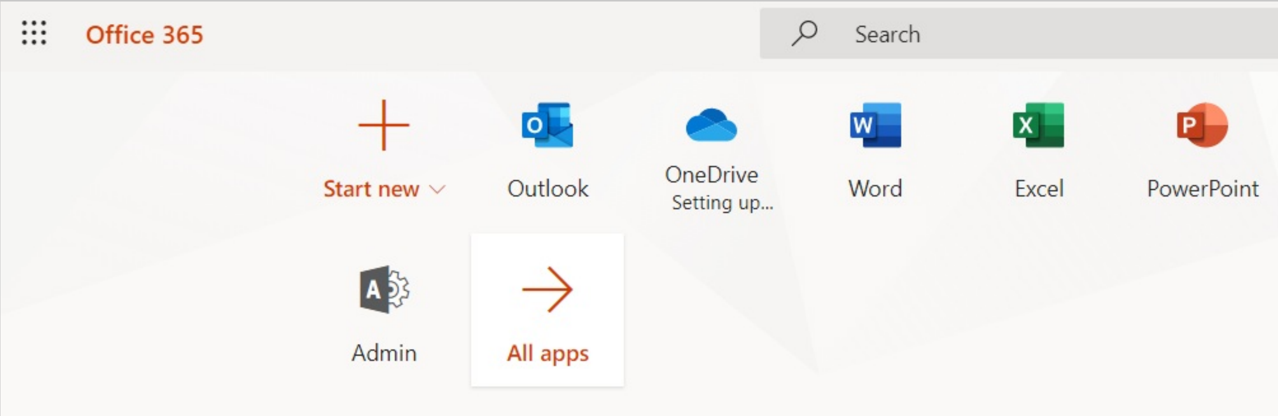


Figure 1: All apps

Then, make sure that **Calendar** is listed in your apps (Figure 2).

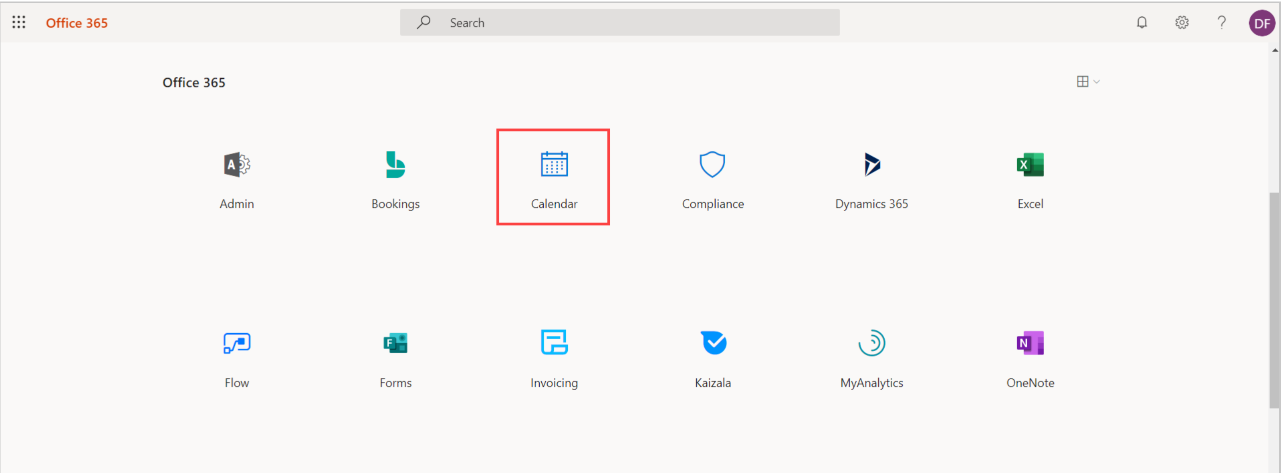


Figure 2: Calendar in the Microsoft 365 account app page

Connect your Microsoft 365 calendar and email via OAuth 2.0

In this article, you'll learn how to connect to your Office 365 Calendar using an encrypted OAuth 2.0 connection.

When you connect to your Office 365 Calendar with an encrypted OAuth 2.0 connection, your sign-in credentials are never revealed during the connection process and are never stored by OnceHub. Instead, a token generated by Microsoft is used to communicate with the Office 365 API.

If your Office 365 account includes Microsoft Teams, you'll be connected to it as soon as you connect your Office 365 Calendar. Learn more

New feature:

We have added a new feature to our Microsoft 365 OAuth connection. Users who have connected their Microsoft 365 calendar to OnceHub can now use the same connection to send notifications from their email address.

To connect your email, follow these steps:

1. Open Profile settings by clicking your profile picture/initials in the top right corner.
2. Click **User integrations**.
3. Below the Microsoft 365 heading, click **Connect your email**

That's it! As Microsoft 365 shares email and calendar settings, this will automatically enable you to use your own address for email notifications.

Important :

To connect OnceHub to your Office 365 Calendar, you must have a calendar in Outlook on the web for business (Outlook Web App), which is provided with Exchange Online.

Connecting to your Office 365 Calendar via OAuth 2.0

1. Sign in to your OnceHub Account.
2. In the top right-hand corner, click on your **Profile icon** (your picture or initials), then select **User integrations**.

   Note:

   If you're connected to any other calendar, you will need to disconnect first. Existing bookings that have not yet taken place will **not** be added to your Office 365 Calendar after you connect.

3. Click the **Connect** button next to **Office 365 Calendar via OAuth**

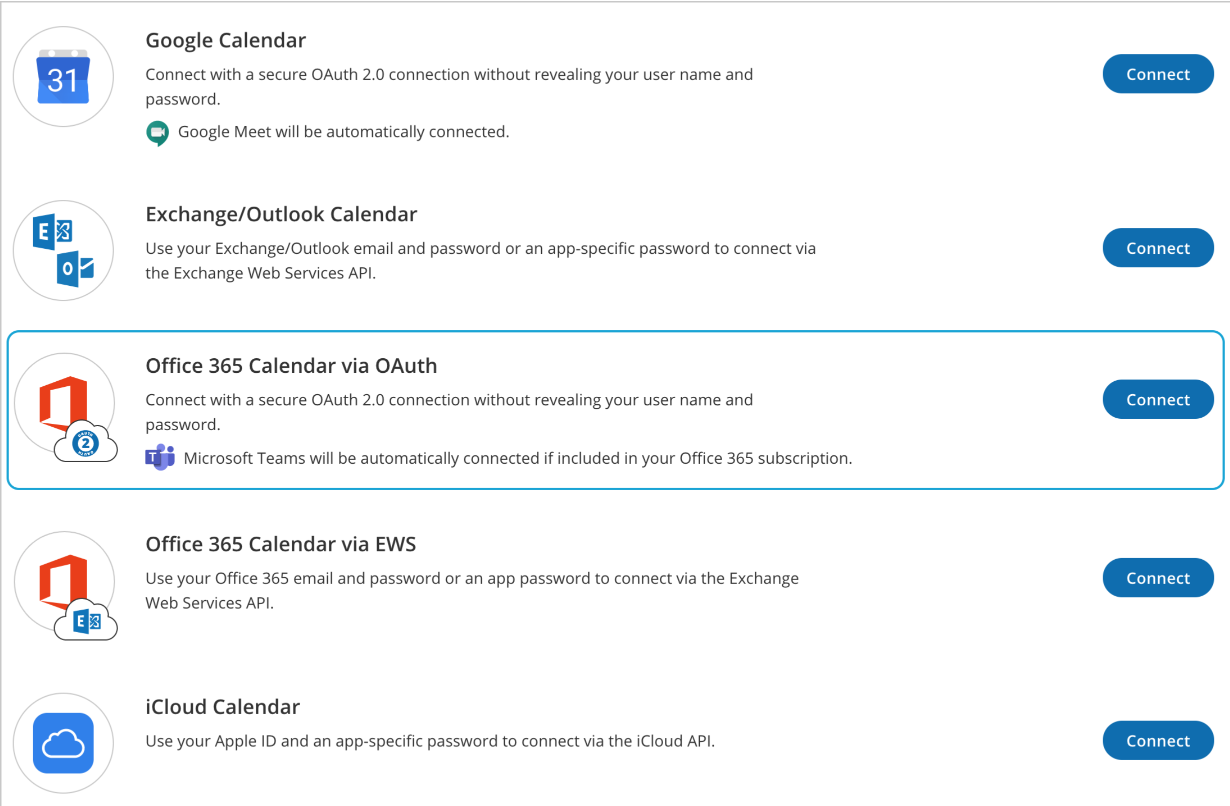


Figure 1: Calendar connection

4. A pop-up window will appear asking you to choose an account to connect to OnceHub. Select the correct account and confirm the connection.
5. Click **Accept** to give OnceHub permission to access your calendars.
   If you're an Office 365 administrator, you can also check a box marked **Consent on behalf of your organization** to approve access for all Users in your organization.

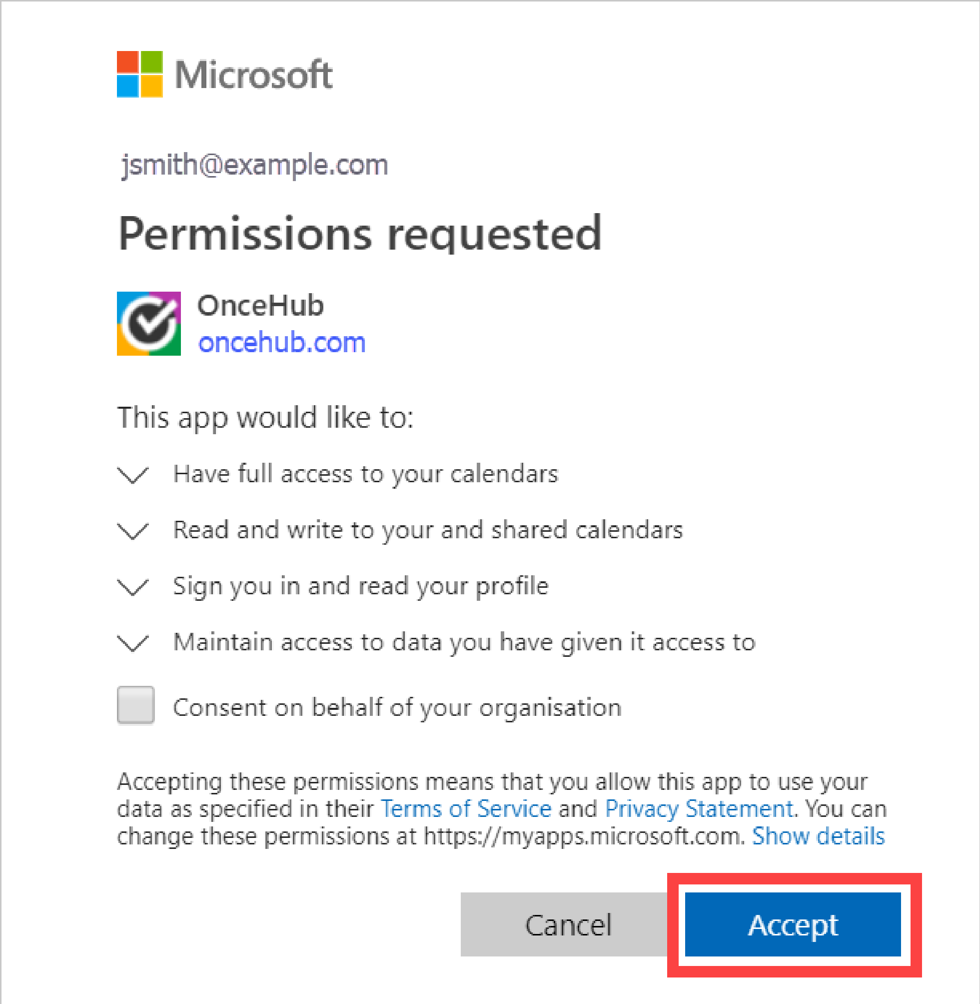


Figure 2: Permissions requested by OnceHub

6. If the connection is successful, the pop-up closes and you should see confirmation that you're connected to your Office 365 Calendar (Figure 3).

Use a OnceHub email address for email notifications

By default, when you connect your Microsoft 365 account, it connects your calendar, email address, and video conferencing all at once.

If you prefer to send email notifications from **mailer@oncehub.com**, instead of your Microsoft 365 email address, you can update your settings:

1. Click the initials/your profile picture at the top right of your screen.
2. Click **Profile settings**
3. From the bar on the left, click **User notifications → Microsoft 365**
4. Scroll to **Email notifications sent to [your] customers**
5. Click **Disconnect** next to your Microsoft 365 email address.
6. From the bar on the left, click **User notifications**
7. Scroll to **Email notifications sent to [your] customers**
8. Click **Disconnect** next to your Microsoft 365 email address.

That's it! Email notifications will now be sent from the default email address, **mailer@oncehub.com**

Configuring Default Office 365 Calendar reminders

You can configure Default Office 365 Calendar reminders in the connected Office 365 Calendar. To do so, sign in to your OnceHub account, open your profile settings by clicking the profile picture at the top right → **User integrations**. Select an option from the **Default Office 365 Calendar reminders** drop-down list (Figure 4).

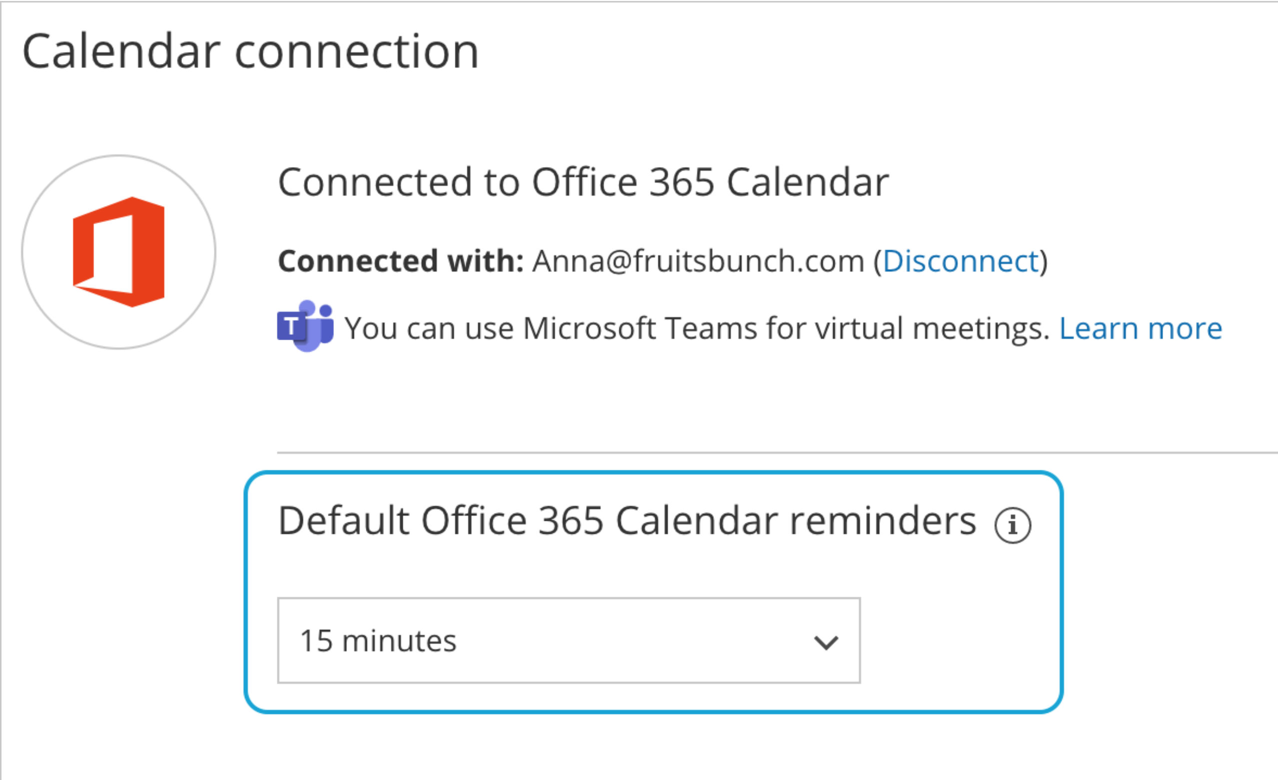


Figure 4: Default Office 365 Calendar reminders

Connect to your Microsoft 365 Calendar with an app password

When you connect to your Microsoft 365 Calendar with an app password, you are permanently authenticating OnceHub with your Microsoft 365 Calendar. App passwords never expire, which ensures that OnceHub will connect to Microsoft 365 continuously and without interruption. Using app passwords guarantees an encrypted connection, and can be used for both personal and corporate accounts.

Note:

An app password isn't used when connecting to your Microsoft 365 calendar via OAuth 2.0, but it is required when connecting a Microsoft 365 email server using MFA to utilize our 'email from your domain' feature.

Important:

To be able to connect OnceHub to your Microsoft 365 Calendar, you must have a calendar in Outlook on the web for business (Outlook Web App), which is provided with Exchange Online.

Enable multi-factor authentication in Microsoft 365

In order to create an app password, you'll need to ensure that multi-factor authentication is set up for yourself or for the user that you're trying to connect.

To check whether multi-factor authentication is enabled, follow these steps:

1. Open your Microsoft 365 admin center and select the **Active users** tab.
2. Click on the action menu (three dots) drop-down. From the list, select Setup multifactor authentication (Figure 1). This will open a new page.

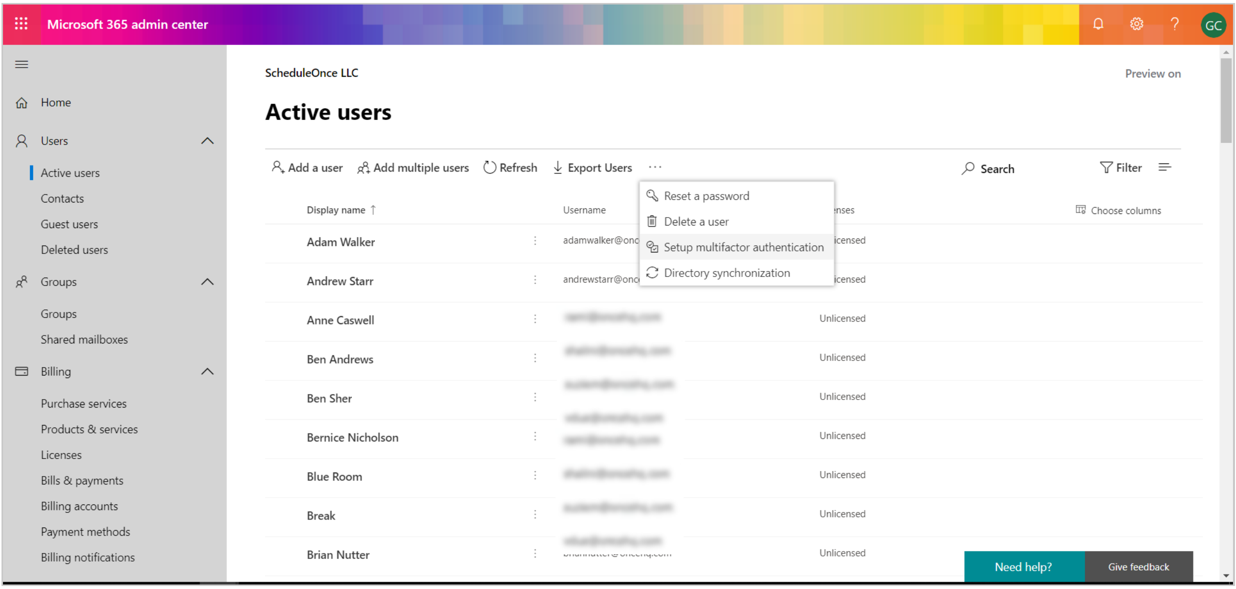


Figure 1: Microsoft 365 admin center

3. Here you can see which users have already been set up with multi-factor authentication (Figure 2). Select the users that you would like to assign multi-factor authentication to and click **Enable**.

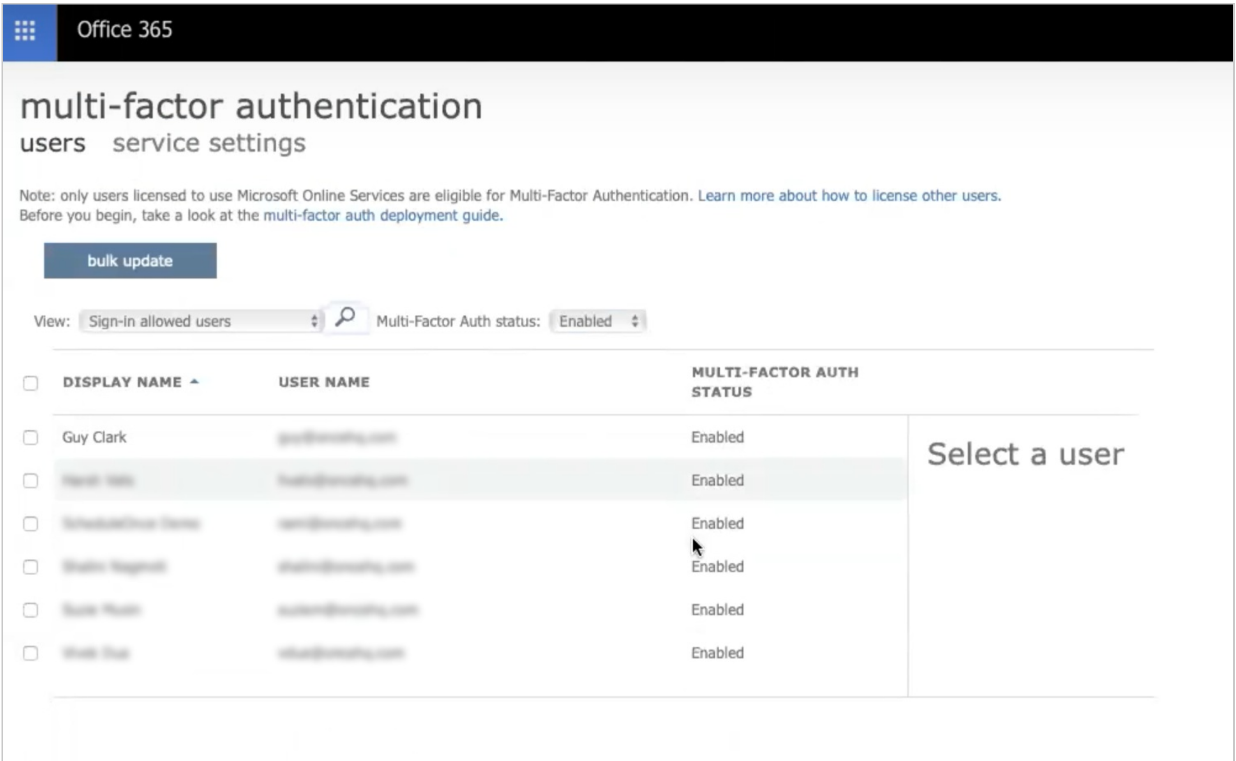


Figure 2: Multi-factor authentication setup

4. Click **enable multi-factor auth** (Figure 3). When the update finishes, close the pop-up.

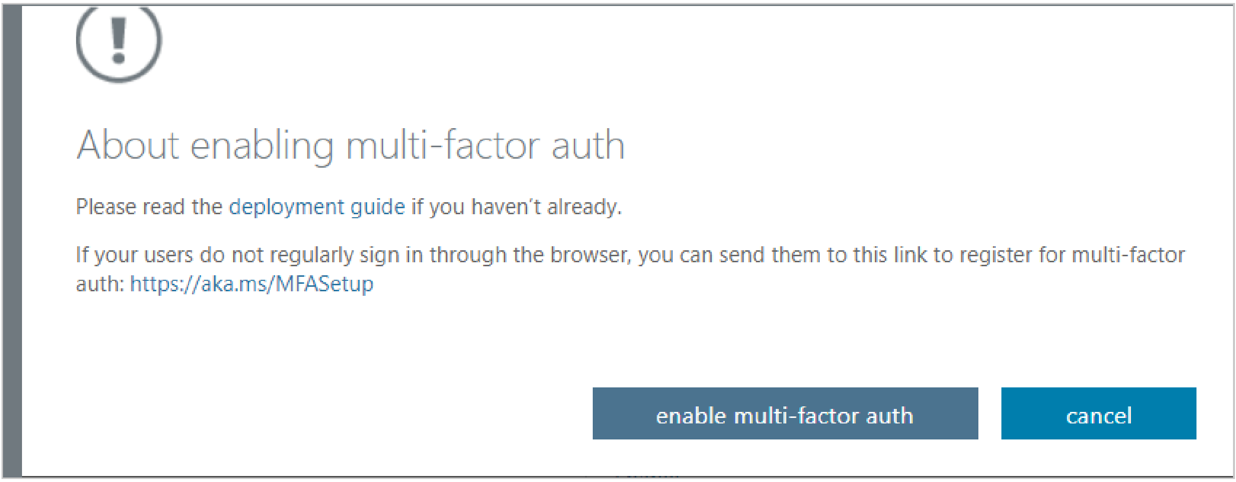


Figure 3: Enable multi-factor authentication

You can now create an app password for a user.

Create an app password

1. Sign in to your Microsoft 365 admin center.
2. Open the user account by clicking on your profile image or initials in the top-right corner of the screen and selecting **My account**.
3. Open the **Security and Privacy** tab (Figure 4).

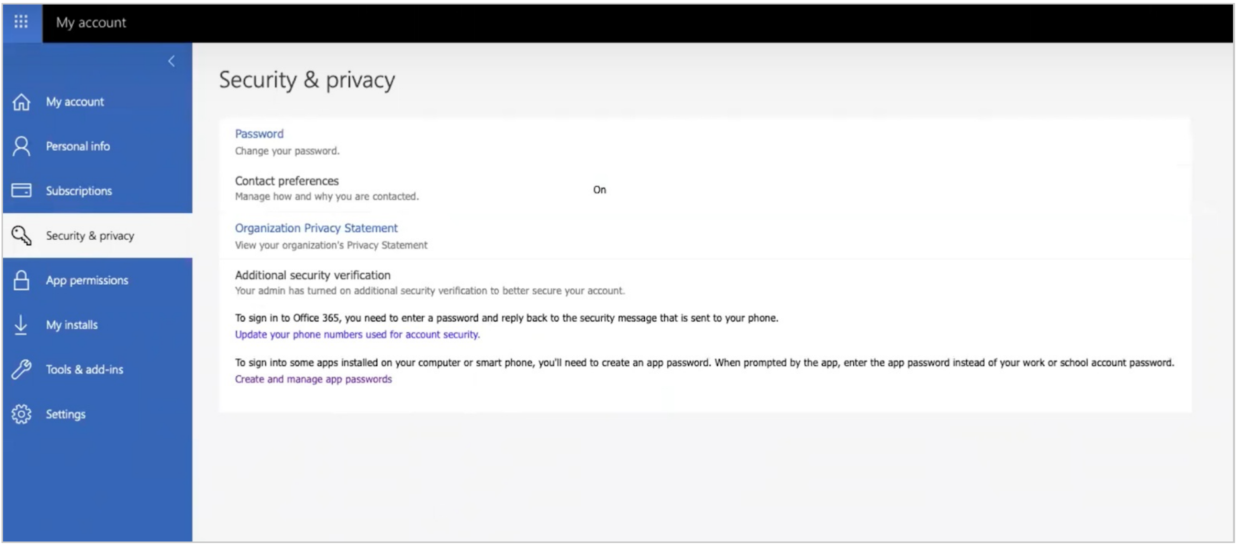


Figure 4: Security & privacy tab

4. Select **Additional security verification**. Then, click **Create and manage app passwords**. This will open a new page.

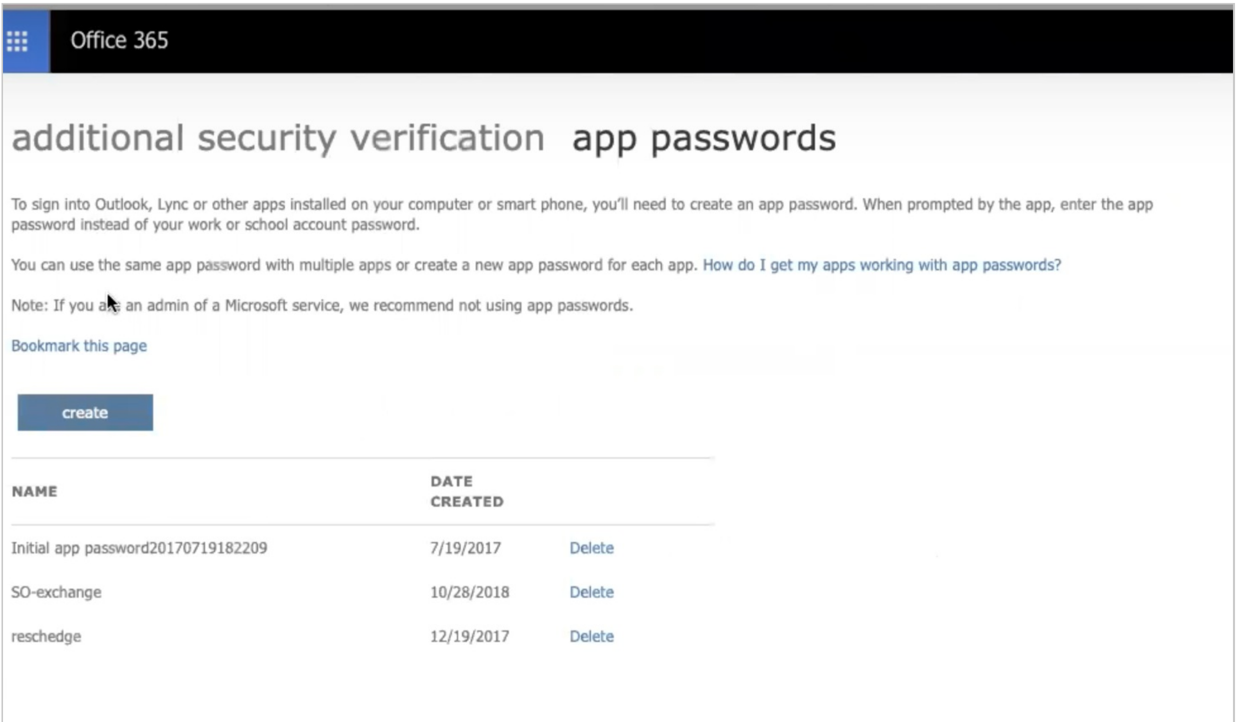


Figure 5: App passwords section

5. Click the **Create** button. A pop-up will appear prompting you to create the password (Figure 6). Once you have entered a name to help you remember the password, click **next**.

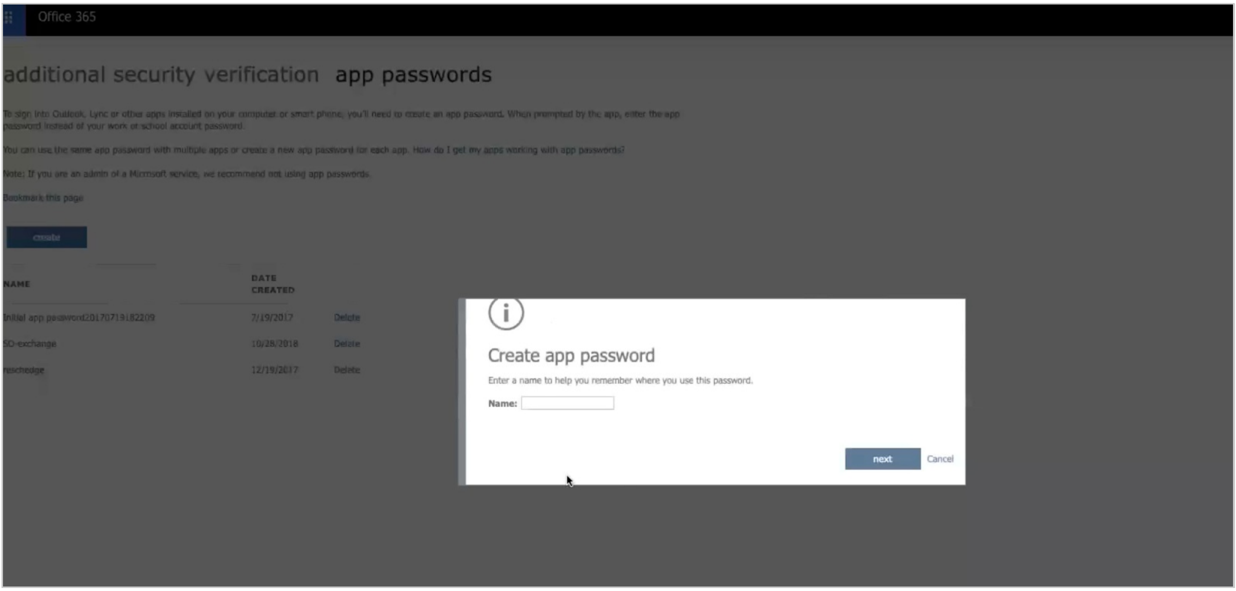


Figure 6: Create app password pop-up

6. Your new password will appear (Figure 7). Copy the app password to your clipboard and use it when you connect in OnceHub.

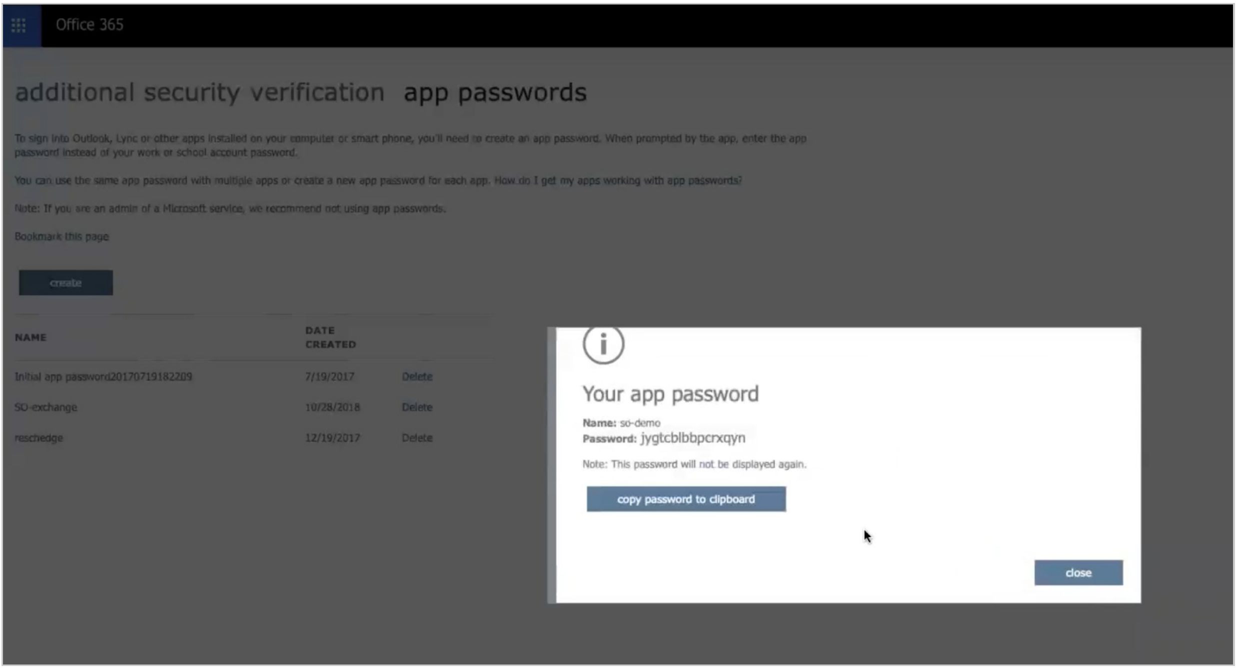


Figure 7: Your app password pop-up

Using additional calendars

In the calendar connection page, under the heading **Meetings are copied to**, you can add an additional calendar that bookings will be copied to. Bookings scheduled in the selected booking calendar will be copied to the additional calendar that you select.

> **Note:**
>
> This feature is only available for booking calendar users.

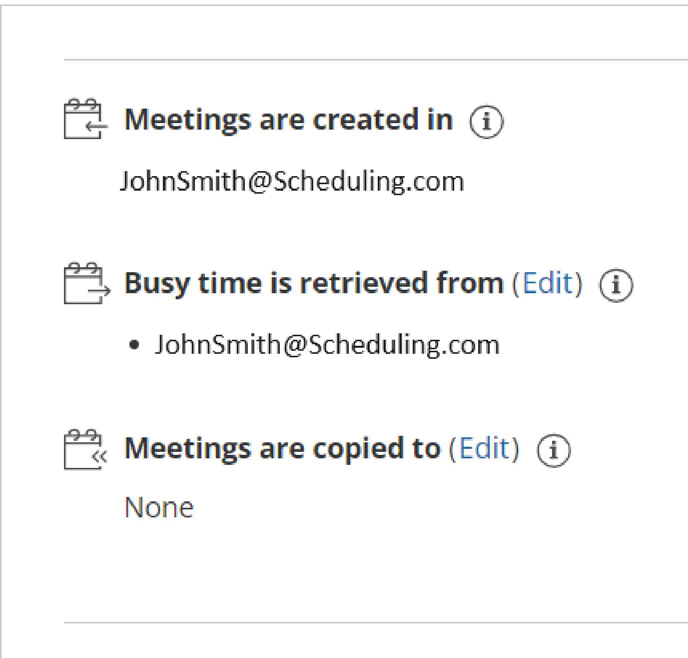


Figure 1: Additional calendar settings

To add an additional calendar:

1. Click your profile icon in the top right corner
2. Click **Calendar connection**
3. Click **Edit** next to the heading **Meetings are copied to**. (Figure 1)
4. In the pop up, from the **Booking calendars** drop-down menu, select the booking calendars you want bookings to be copied from. All booking calendars which you are the host of, or are hosted by a team of which the user is a part, will be displayed here.
5. Next, from the **Copy to** drop-down menu, select the calendar that you want the booking to be copied to. The drop-down menu will display all of the additional calendars that you have created or been added to in your Microsoft 365 calendar..
6. When you're done, click **Save** at the bottom of the pop up.
    - To remove a calendar from these settings, click **Edit** and then click the **X** at the end of the row.
7. To add further additional calendars, click **+ Add calendar** in the Edit pop up.

Now meetings scheduled in the selected booking calendars will appear in the additional calendars that you have chosen. Updates to the original meeting, such as the meeting being rescheduled or canceled, will be updated in the additional calendar. Additional calendars don't support updates about reassigned meetings.

Microsoft 365 corporate connection

The Microsoft 365 corporate connection mode enables users to connect to their Microsoft 365 Calendars via one mailbox only. This method is an alternative to the personal connection mode, where each user is required to connect individually and provide their own Microsoft 365 account credentials. The corporate connection method is available for a fee to large accounts.

Why connect with a corporate connection?

Corporate connection to Microsoft 365 provides several important advantages:

- **Security:** Only one password per account is provided to OnceHub. The credentials belong to the dedicated mailbox, which is empty and contains no sensitive information. Learn more about how your sign-in credentials are stored and protected by OnceHub
- **Centralized management:** The Microsoft 365 admin has full control over the entire account connection from the dedicated mailbox.
- **Changing password:** The admin may change the dedicated mailbox password at any time and notify OnceHub about the change, immediately renewing the calendar connection for the entire account.

The Admin maintains full control over every aspect of the calendar connection and the Members of the account keep working without interruption.

How does the corporate connection work?

In corporate mode, only one dedicated mailbox is connected to the OnceHub Account, and all events are synced via the dedicated mailbox.

1. A dedicated mailbox is set up by an Microsoft 365 admin.
2. All users that accept bookings must delegate their main calendar to the dedicated mailbox. Delegation can be

configured either centrally by an Microsoft 365 admin, with no action required from the Users, or by each User individually.
See these articles for delegation instructions for individual users: Delegating in Microsoft 365 and Outlook Web App (OWA) or Delegating in Outlook client.

3. Only the dedicated mailbox is connected to the OnceHub Account, and not individual users. OnceHub only stores one set of credentials in an encrypted format.
4. Only users' busy time is retrieved from Microsoft 365 via the dedicated mailbox. The specific details of calendar events will remain private.
5. OnceHub bookings are added to the respective users' calendars.

Sounds right for your account? Contact us to proceed.

Switching from the PC connector for Outlook to Microsoft 365 integration

We generally recommend switching from our PC connector for Outlook to our direct Microsoft 365 calendar connection. In all cases, switching is completely safe and all booking data persists.

Who can switch?

Any OnceHub user whose email account is on Microsoft 365. However, the Microsoft 365 Calendar integration does not support resource calendars and shared calendars for OnceHub yet.

If you're using Exchange, you should connect your calendar using our Exchange integration.

What happens when I switch?

When you switch, only the connection method is replaced, while the connected calendars remain the same. You are essentially reconnecting via another method to the same email account with the same calendars.

For users that **only use their default calendar**, busy time will still be retrieved from the same default calendar. All existing bookings will remain in the default calendar, and new bookings will keep being added to the default calendar.

How do I switch?

Follow these steps to switch from the PC connector to a direct Microsoft 365 Calendar connection.

1. Select your profile picture or initials in the top right-hand corner → **Profile settings** → **Calendar connection**.
2. Click the **Disconnect** link and approve the disconnection in the confirmation pop-up.
3. You can now connect OnceHub to your Microsoft 365 Calendar using an encrypted OAuth 2.0 connection.
4. After you've connected your Microsoft 365 Calendar, go to the Date-specific availability section of your Booking page and click to verify your busy time is retrieved from your connected calendar.
5. Go to the Associated calendars section of your Booking page to select the calendars that you wish to use.
6. Make a test booking on your Booking page to see the event created in your calendar.
7. Optional: If you wish to uninstall the Outlook connector from your PC, you may do so by following Steps 1-4 in the connector upgrade article.

Using shared calendars in Microsoft 365 Calendar

You can use shared Microsoft 365 Calendars in OnceHub via your OnceHub account. Shared calendars can be used when you connect via either a personal connection or a corporate Microsoft 365 connection.

Sharing calendars allows OnceHub to create bookings in and retrieve busy time from calendars that are not owned by you.

Read on to learn about using shared calendars in Microsoft 365 Calendar.

Shared calendar options

Each connected calendar in OnceHub can be used either as a main booking calendar, a calendar to retrieve busy time from, or an additional booking calendar. This can be configured for each Booking page under the Associated calendars section.

With shared calendars, the same three options apply. The only added requirement is that the calendar owner grants you the necessary permission level within Microsoft 365 (Figure 1).

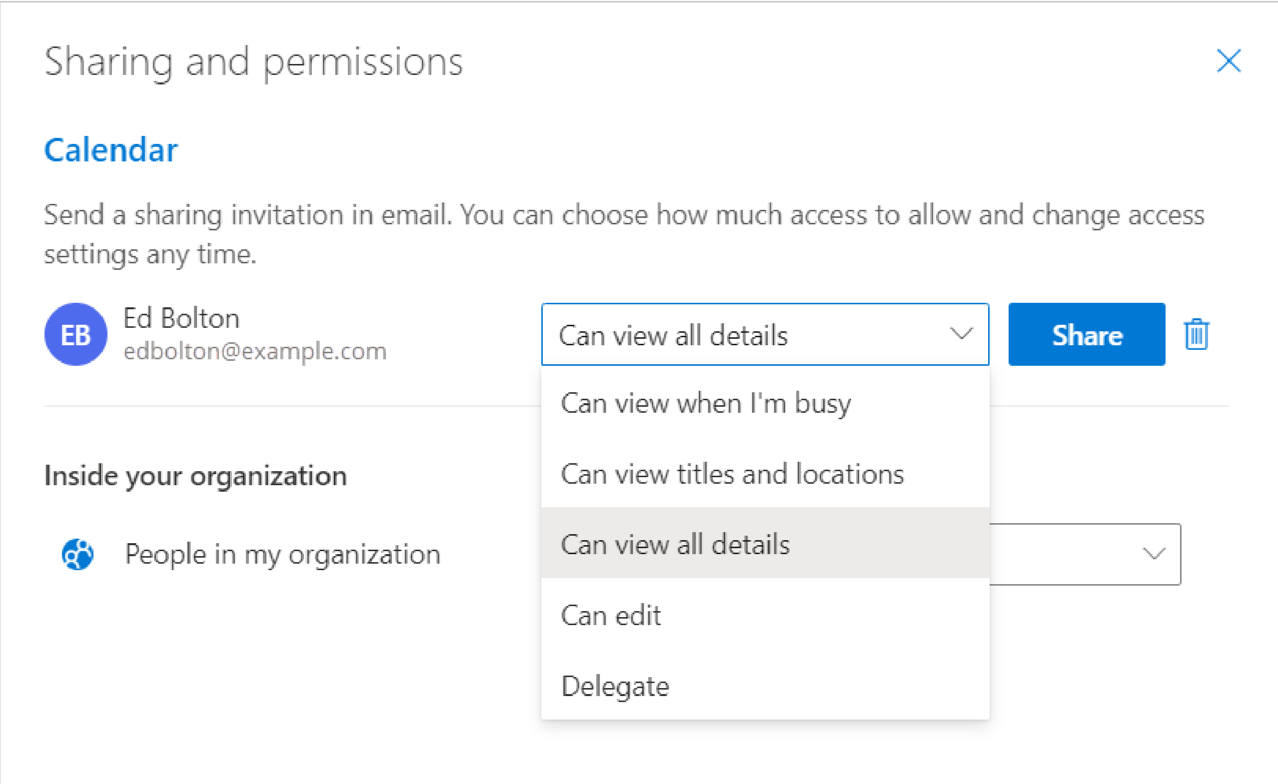


Figure 1: Sharing and permissions

- To use the calendar as a **Main booking calendar**, you must be granted Editor or Delegate permission level in Exchange/Outlook.
- To use the calendar for **Busy time retrieval**, you can be granted any permission level in Exchange/Outlook.
- To use the calendar as an **Additional booking calendar**, you must be granted Editor or Delegate permission level in Exchange/Outlook.

Which calendars can be shared?

Most Outlook calendars can be shared. Your ability to share calendars depends on the sharing policy specified by your Microsoft 365 administrator.

You can share calendars on the same domain, or share calendars across different domains. To use shared calendars on the **same domain**, follow the sharing instructions below.

To use calendars shared **across different domains**, the person given access to the shared calendar must accept the sharing by clicking the link or button in the email notification. These calendars will be automatically added to the calendar list in the Calendar section of each Booking page. You do not need to do anything else to use these calendars in OnceHub. Sharing calendars across domains requires specific settings in your Microsoft 365 configuration.

Using shared calendars when connected with a personal connection

Follow these steps to use a same-domain shared calendar when connected with a personal Microsoft 365 Calendar connection.

1. Ensure that the calendar owner shared their main calendar with you as Editor or Delegate. Additionally, sub calendars may also be shared. Each calendar must be shared individually.
2. Add the calendar owner's email address in the Associated calendars section of each Booking page. All calendars and sub-calendars shared with you, will appear in the calendar list.
3. Select how each calendar will be used: **Main booking calendar**, **Busy time retrieval**, or **Additional booking calendar**. If your permissions are insufficient, ask the calendar owner to change your permission level.

Using shared calendars when connected with a corporate connection

Follow these steps to use a same-domain shared calendar when connected with an Microsoft 365 corporate connection.

1. Ensure that the calendar owner shared their main calendar with your dedicated mailbox as Editor or Delegate. Additionally, sub-calendars may also be shared. Each calendar must be shared individually. Note that all corporate account members will gain access to all shared calendars.
2. Add the calendar owner's email address in the Associated calendars section of each Booking page (Figure 1). All calendars and sub calendars shared will appear in the calendar list.
3. Select how each calendar will be used: **Main booking calendar**, **Busy time retrieval**, or **Additional booking calendar**. If your permissions are insufficient, ask the calendar owner to change the permission level.

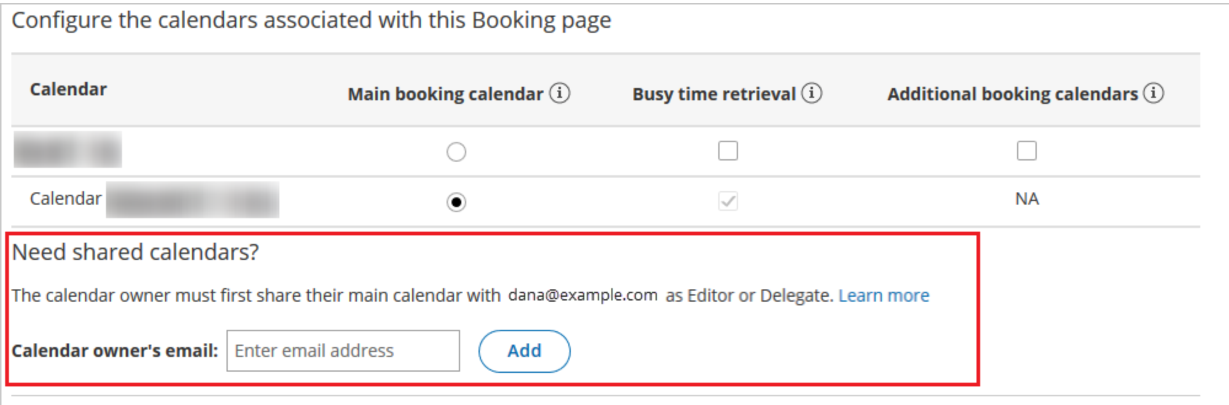


Figure 2: Associated calendars section of the Booking page

Configuring your Office 365 Calendar when connected via OAuth 2.0

Last Modified on Jul 16, 2020

When you connect to your Office 365 Calendar with an encrypted OAuth 2.0 connection, your sign-in credentials are never revealed during the connection process and are never stored by OnceHub. Instead, a token generated by Microsoft is used to communicate with the Office 365 API.

In this article, you'll learn about how to configure your Office 365 Calendar with OAuth 2.0 connection.

Configuring Default Office 365 Calendar reminders

You can configure default Office 365 Calendar reminders in the connected Office 365 Calendar. To do so, sign in to your OnceHub account, open the left sidebar and select **Profile -> Calendar connection**. Select an option from the **Default Office 365 Calendar reminders** drop-down list (Figure 1).

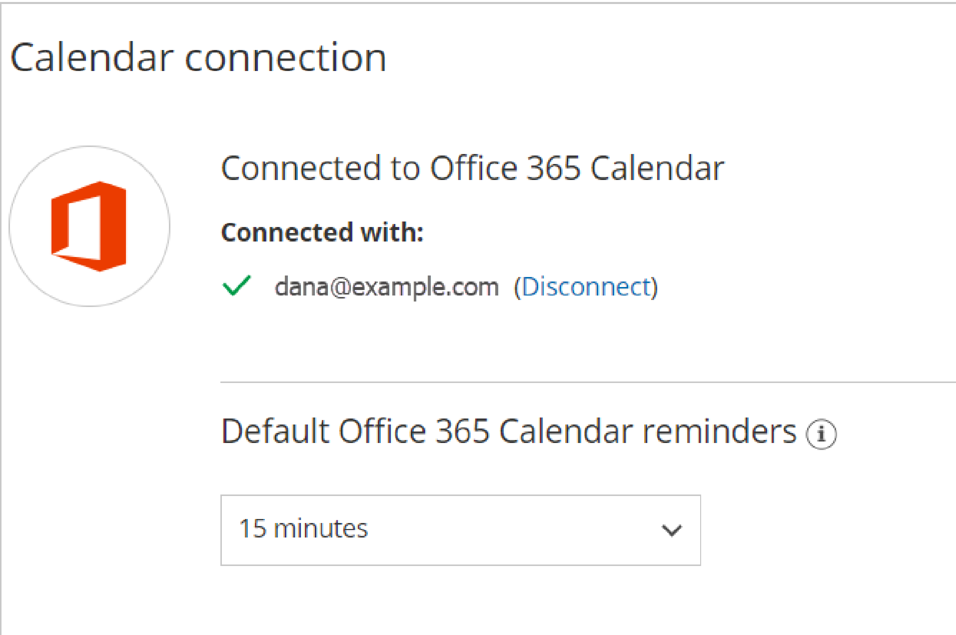


Figure 1: Default Office 365 Calendar reminders

Configuring your associated calendars in ScheduleOnce

You can configure which calendars ScheduleOnce should create appointments in. To do this, just follow these steps:

1. Go to **Setup -> ScheduleOnce setup ->** relevant Booking page **-> Associated calendars**.
2. A list of your Office 365 Calendars will appear, with your default calendar marked as the **Main booking calendar**.
3. You can change this by checking the box for another calendar in the **Main booking calendar** column.

Note:

The connection to Office 365 via OAuth 2.0 can only retrieve calendars under your ownership or that were expressly shared with you.

Resource calendars are not supported. If you need to use resource calendars, see our Office 365 Calendar via EWS integration.

4. Select any other calendar you want to retrieve busy time from or that you'd like to add ScheduleOnce bookings to.
5. Click **Save**.

Your ScheduleOnce Booking page is now integrated with your Office 365 Calendar. Learn more about configuring your calendar settings

The last thing to do is to test that ScheduleOnce bookings appear in your Office 365 Calendar. Click your Booking page link in your Booking page Overview section and schedule an appointment with yourself. You should use a different email than the one you used to sign up.

Once the booking has been made, check your Office 365 Calendar to make sure a calendar event has been created for the meeting with the relevant alert.

Configure your Microsoft 365 (Office 365) Calendar

Last Modified on Jan 7, 2024

In order to make the best use of our integration with Microsoft 365 Calendar, you may need to adjust some of the default settings. This article explains how to go about configuring these settings.

If you want to learn how to connect your Microsoft 365 Calendar, learn more here.

Configuring Default Microsoft 365 Calendar reminders

You can configure default Microsoft 365 Calendar reminders in the connected Microsoft 365 Calendar. To do so, sign in to your OnceHub account, open the left sidebar and select **Profile → Calendar connection**. Select an option from the **Default Microsoft 365 Calendar reminders** drop-down list (Figure 1).

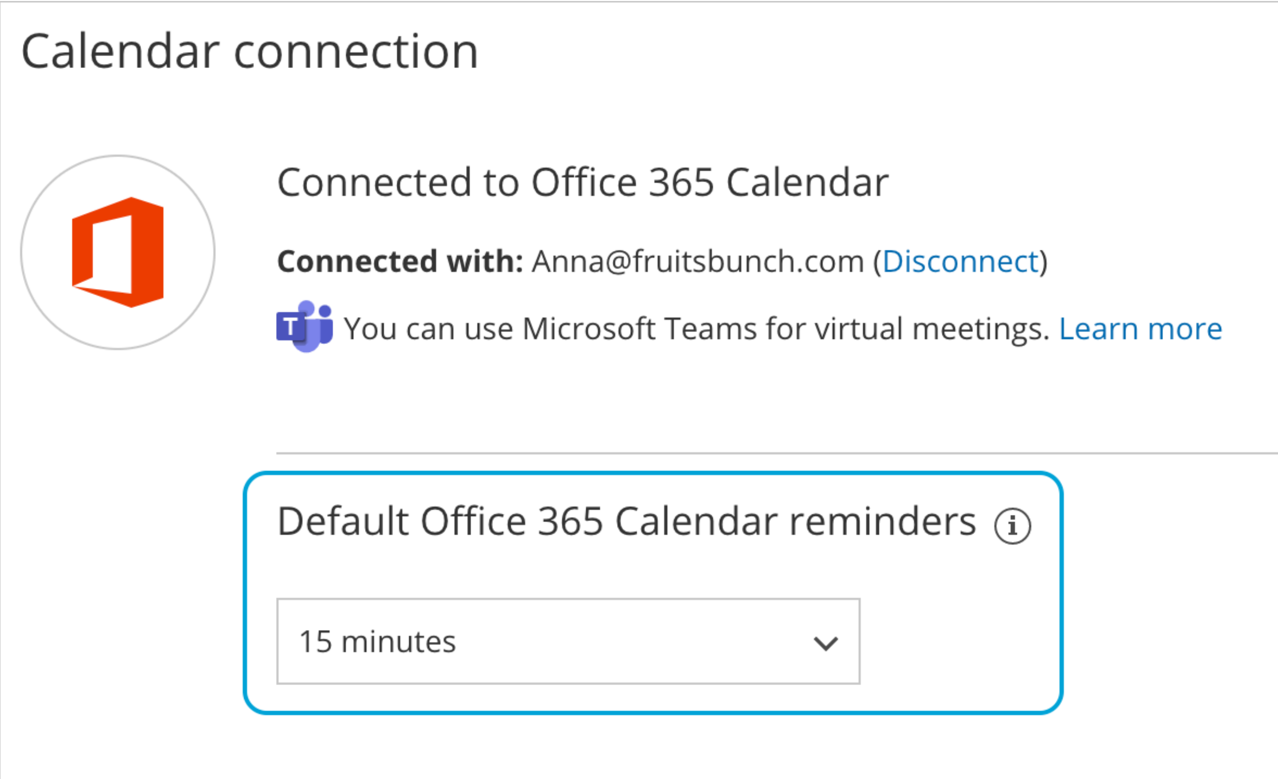


Figure 1: Adjusting default Microsoft 365 settings

Delegation setup: Microsoft 365 or Outlook Web App (OWA)

This is a step-by-step guide to set up delegation in your Microsoft 365 or Outlook Web App (OWA) as part of a corporate connection to Exchange. Follow these steps **only when instructed** to do so by your Exchange administrator, because they need to make some organization-level changes before you begin to delegate.

Delegation means that you permit a dedicated Exchange mailbox to create and manage events on your behalf. You must delegate if your organization is using Exchange integration in Delegation mode. If you are using Outlook client, see Outlook client delegation guide instead.

1. Sign in to your Microsoft 365 account and navigate to your calendar.
2. Select your main calendar in the list on the left and click Share button at the top (Figure 1).

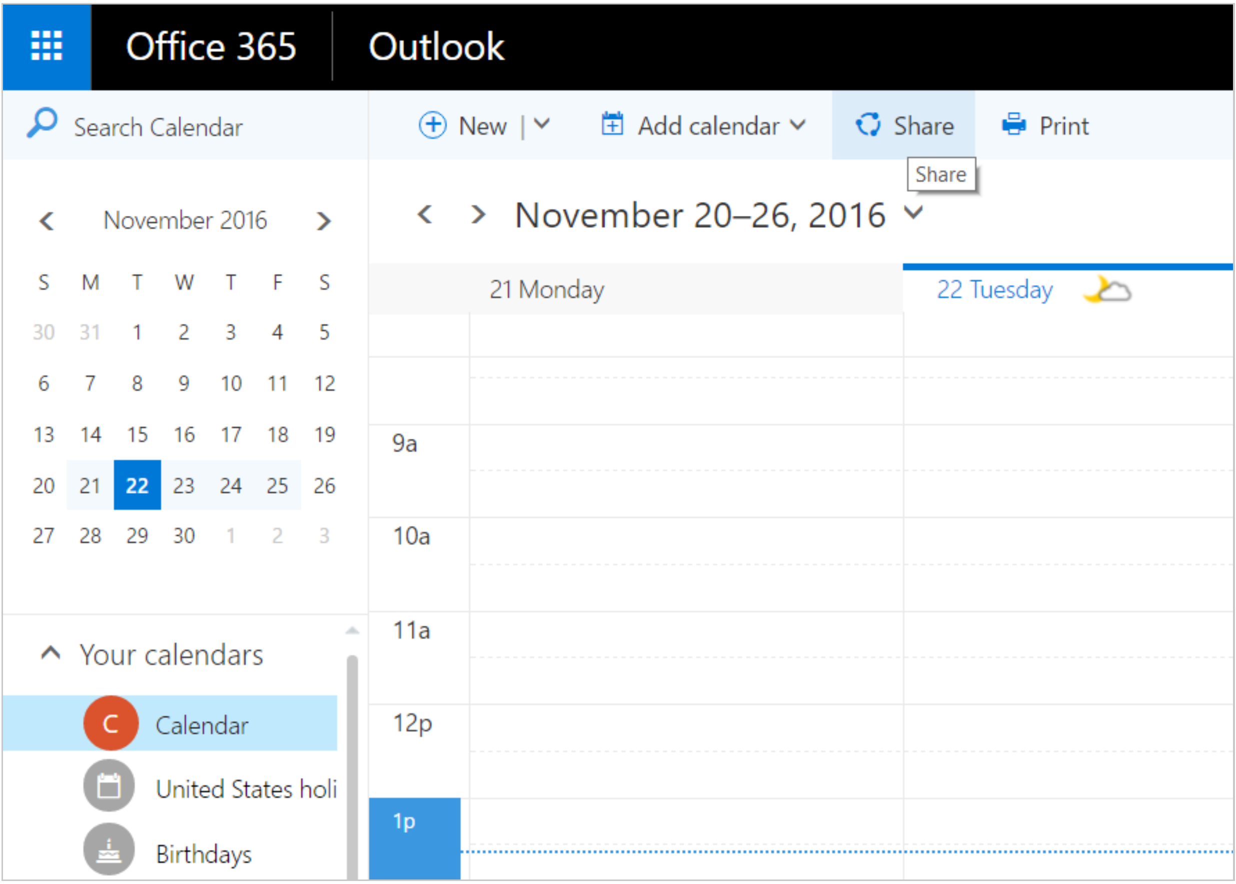


Figure 1: Select your main calendar

3. Search for the OnceHub dedicated mailbox, created by your administrator (Figure 2).

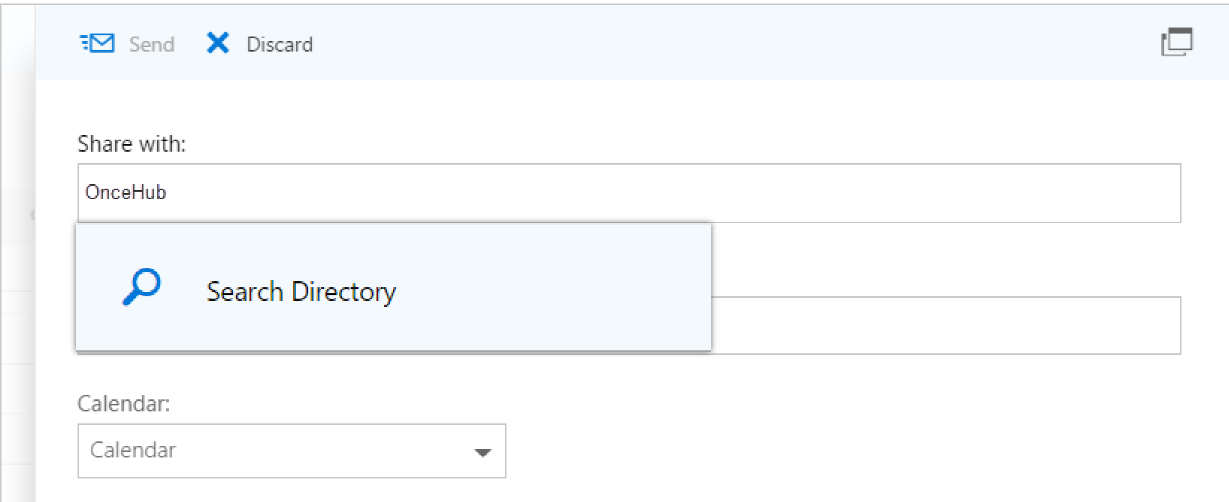


Figure 2: Search Directory

4. Select Delegate in the drop-down list and click Send button at the top (Figure 3).

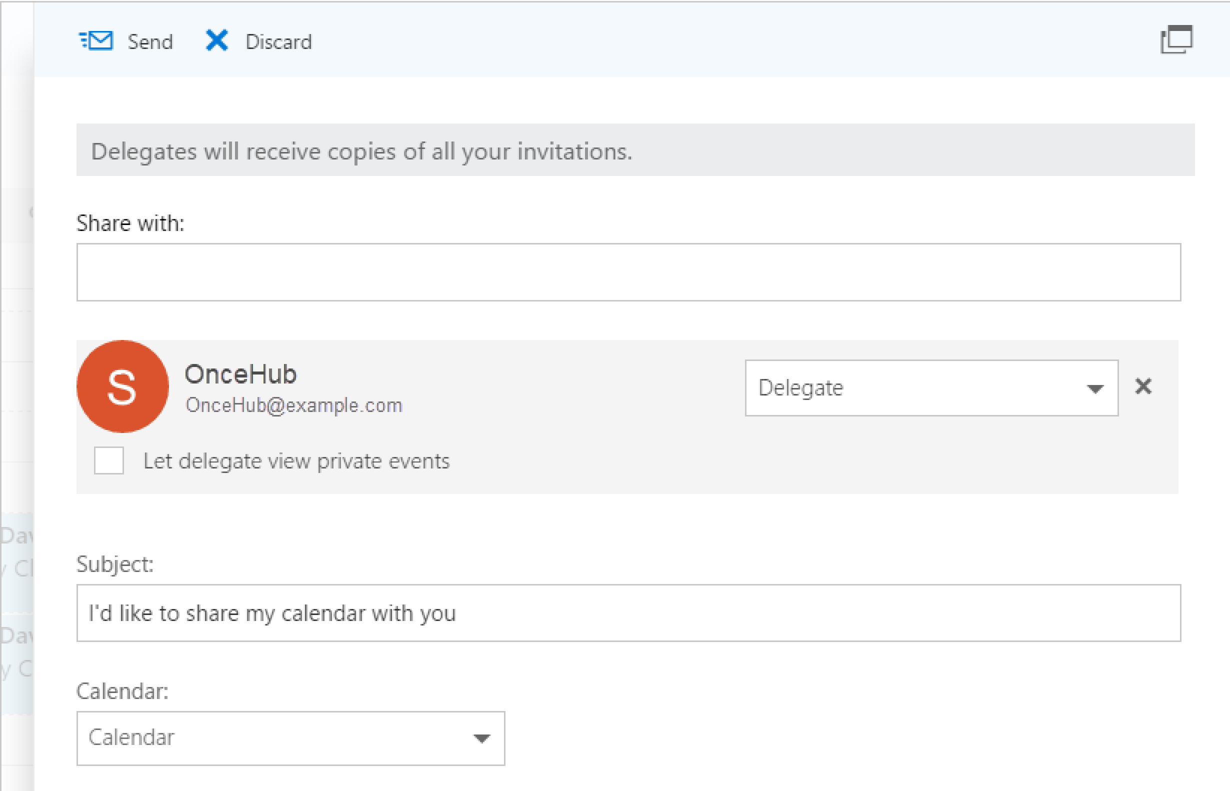


Figure 3: Select Delegate

That's it - you are done! Your calendar is delegated to the dedicated Exchange mailbox, and connected to OnceHub.

How can I set the “From” address for delegate meeting invitations?

To set the “From” address for delegate Exchange folders, an Exchange administrator can set “Send on Behalf” and “Send As” permissions for a delegated Exchange mailbox.

- **Send on Behalf** allows the delegate to select the delegator’s account in the From field. The recipient of the meeting invitation will see the following in the From field: "From: Mailbox <delegate's address> on behalf of Mailbox <your address>". "Send on Behalf" permissions can also be set by a delegator in Outlook by selecting **File->Info->Account Settings-> Delegate Access->** and select the delegate and set all Folders to None.
- **Send As** allows the delegate to send invitations that appear to come from the delegator.

Delegation setup: Outlook Client

This is a User step by step guide to set up delegation in Outlook client on your PC as part of a corporate connection to Exchange. **Follow these steps only when instructed to do so by your Exchange administrator** , because they need to make some organization level setting before you begin to delegate.

Delegation means that you permit a dedicated Exchange mailbox to create and manage events on your behalf. You must delegate if your organization is using Exchange integration in Delegation mode. If you are using Office 365 or Outlook Web App (OWA) in your web browser, see the Office 365 delegation guide below instead.

1. Open Outlook on your PC.
2. Click **File → Account Settings → Delegate Access** (Figure 1).

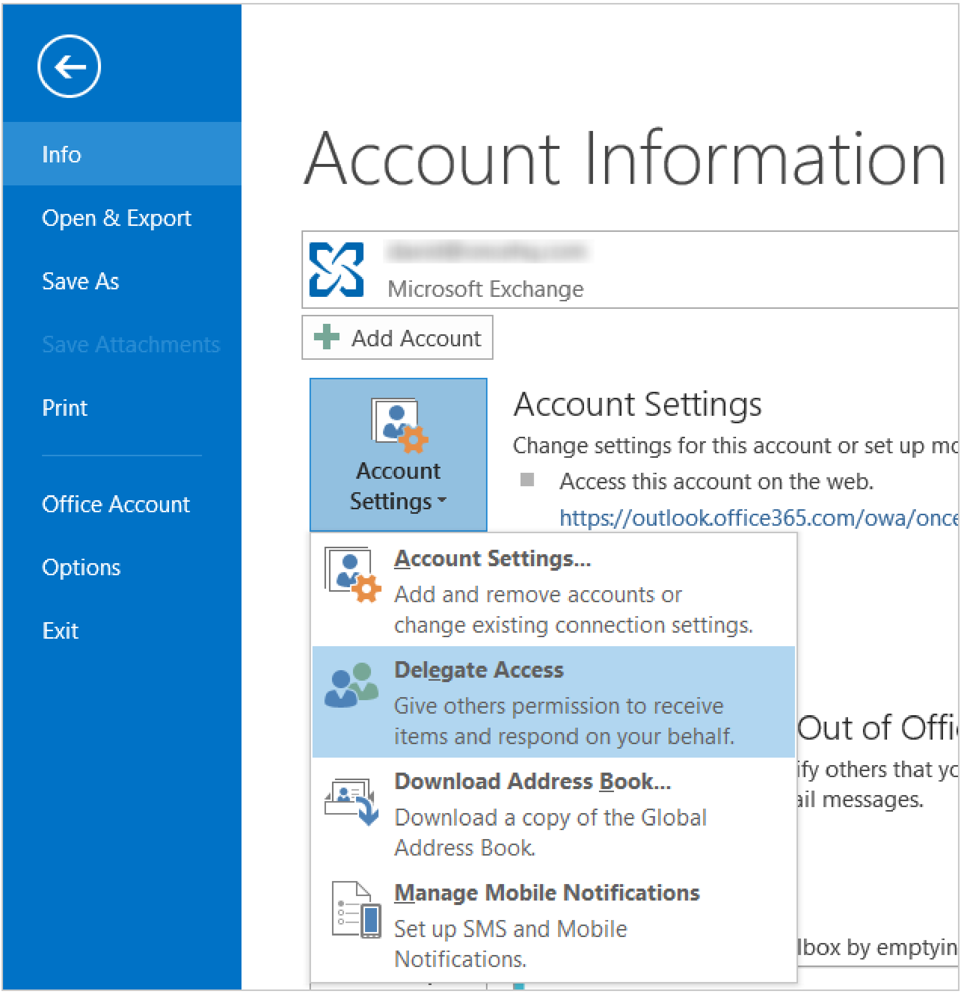


Figure 1: Delegate access

3. In the **Delegates** window click the **Add** button (Figure 2).

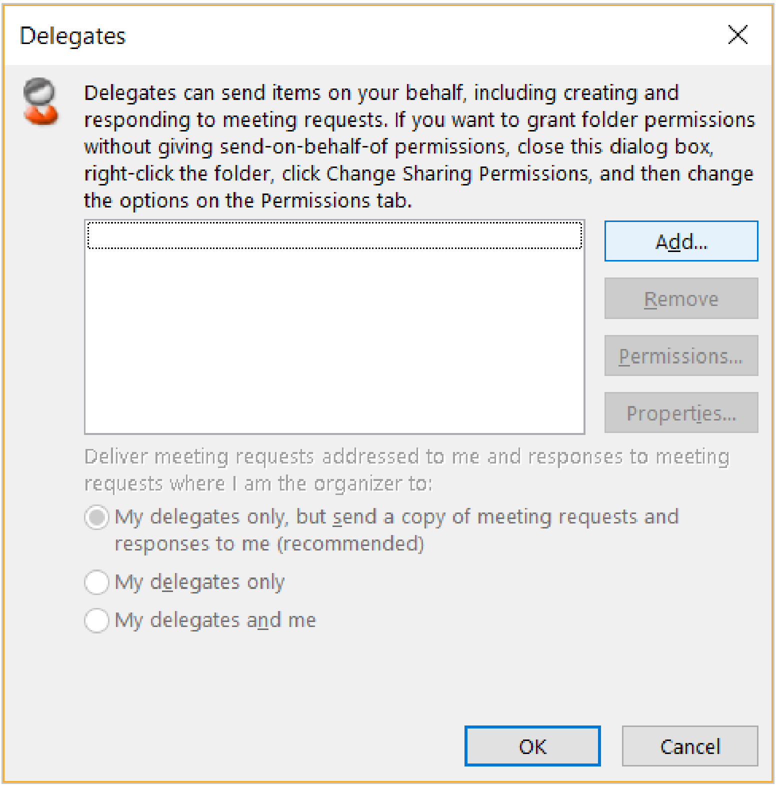


Figure 2: Add a delegate

4. In the **Add Users** window select the dedicated mailbox, OnceHub in this example (Figure 3). Click the **Add** button at the bottom and click OK. If OnceHub mailbox is not present, ask your Exchange administrator to create it first.

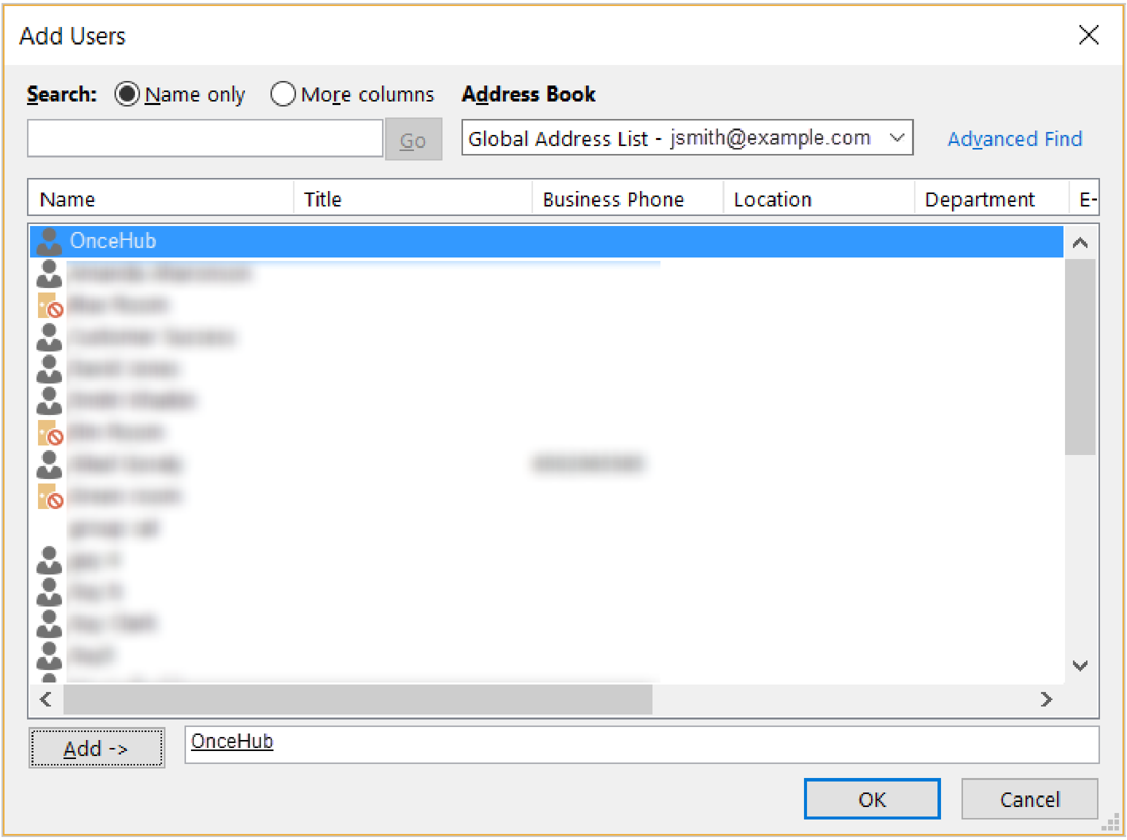


Figure 3: Add Users window

5. In the **Delegate Permissions** window (Figure 4), set the Calendar to Editor permissions. Check the "Delegate receives copies of meeting-related messages sent to me". Then click **OK**.

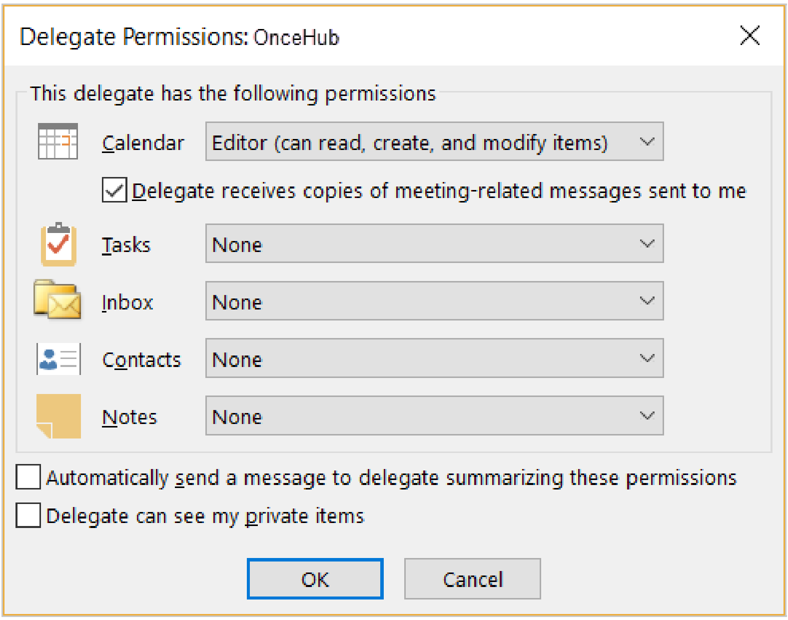


Figure 4: Delegate Permissions window

6. In the **Delegates** window (Figure 5), select the last option "My delegates and me" and click **OK**.

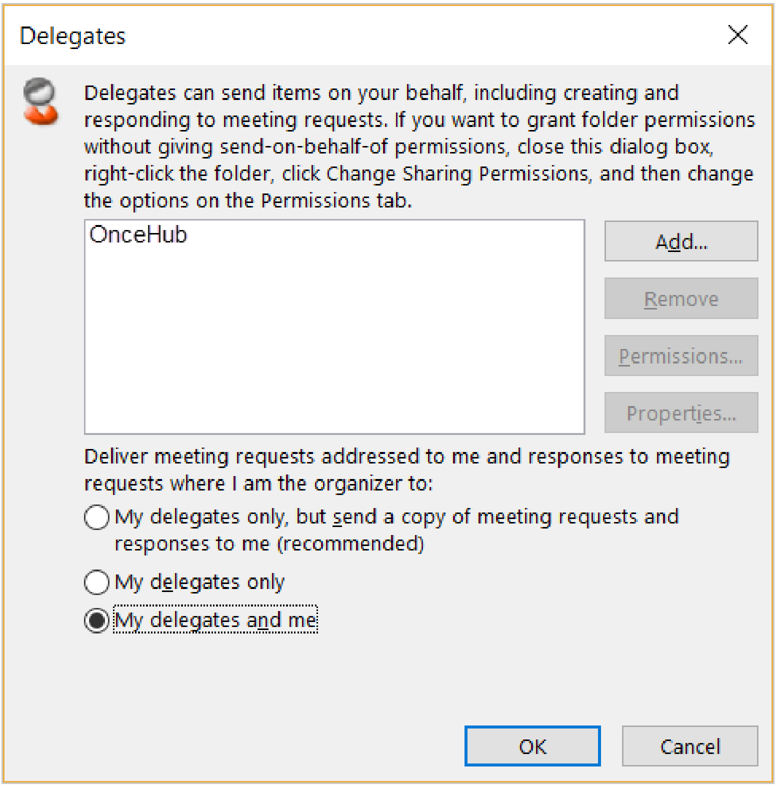


Figure 5: Delegates window with a new User added

That's it - you're done! Your calendar is delegated to the dedicated Exchange mailbox and connected to OnceHub.

Manage delegation permissions

If you need to modify your delegation permissions, right-click your calendar and select Permissions (Figure 4).

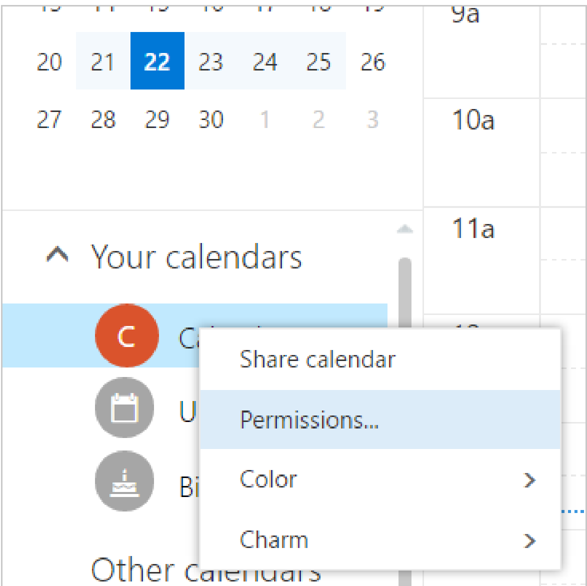


Figure 4: Select Permissions from the drop-down menu

In the Permissions window, you can modify permissions levels and remove users (Figure 5). Remember to click **Save** when done.

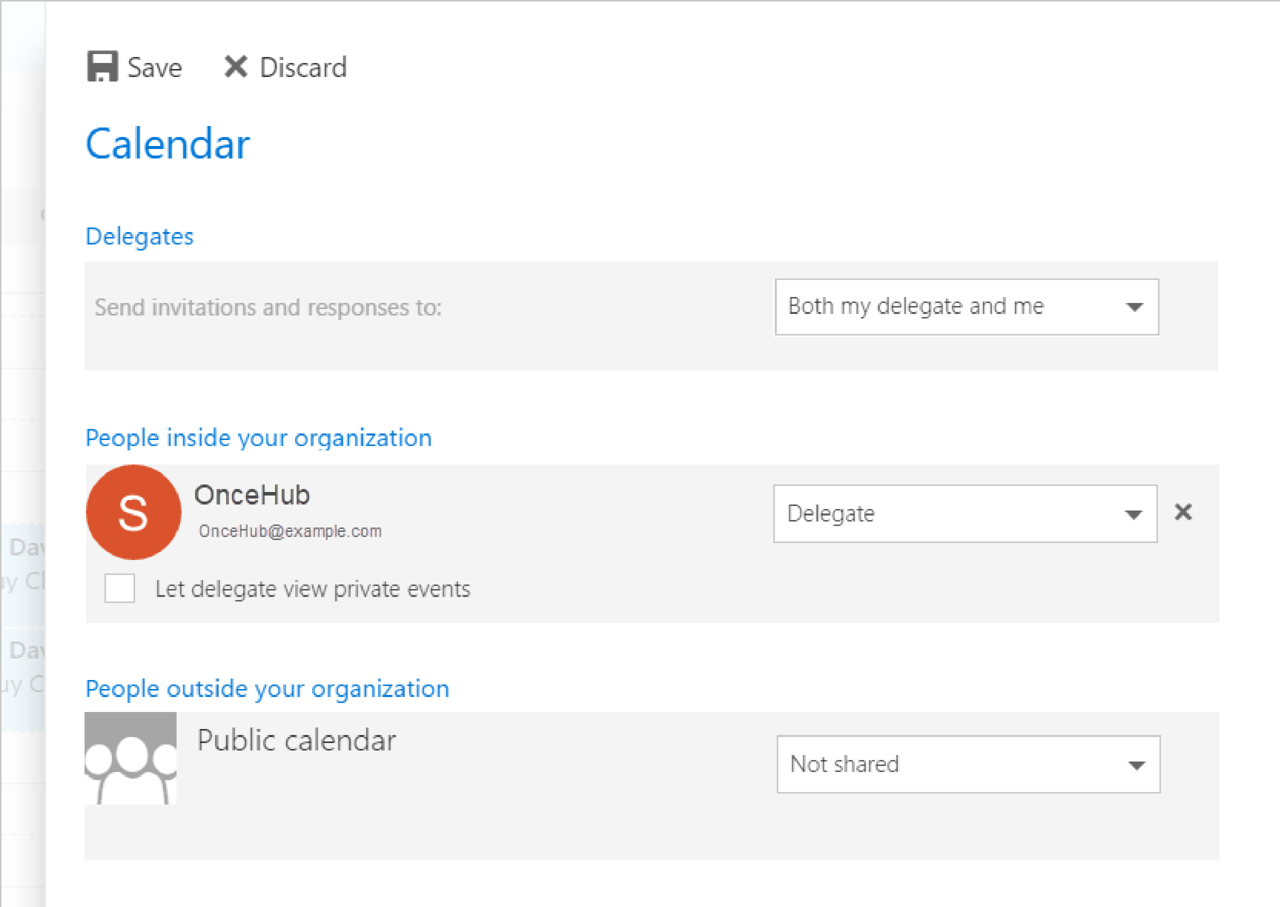


Figure 5: Modify permissions or remove users

When are Microsoft 365 events treated as busy in OnceHub?

Microsoft 365 has a number of different availability configurations. This setting can be found by editing an individual event, in the "Show as" field (Figure 1).

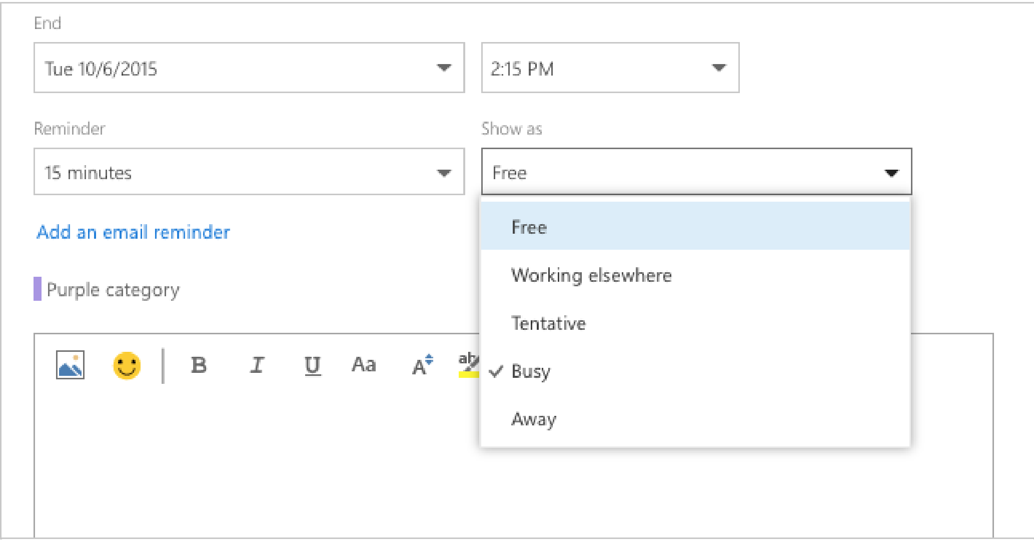


Figure 1: The "Show as" field

1. **Free:** OnceHub will not read this time as busy. This is useful when you want to indicate specific events on your calendar without having those events block your availability.
2. **Working elsewhere:** OnceHub reads this time as busy and blocks availability.
3. **Tentative:** OnceHub reads this time as busy and blocks availability.

4. **Busy:** OnceHub reads this time as busy and blocks availability.
5. **Away:** OnceHub reads this time as busy and blocks availability.

All-day events in Microsoft 365 Calendar are set to Free by default. Regular events are set to Busy by default. Learn more about Microsoft 365 Calendar with OnceHub

Approving OnceHub permissions for Microsoft 365 administrators

Last Modified on Apr 11, 2024

OnceHub has introduced a new capability to automatically connect your Microsoft email when you connect your Microsoft calendar. Emailing from your own domain allows you to personalize and brand your OnceHub email communications.

A new permission is now required in order to send emails on your behalf.

- Depending on your company policies, you may need your Microsoft admin to approve the new email permission for your OnceHub account.
- If this is required, you'll need to click '**request approval'** in an **Approval required** pop-up.

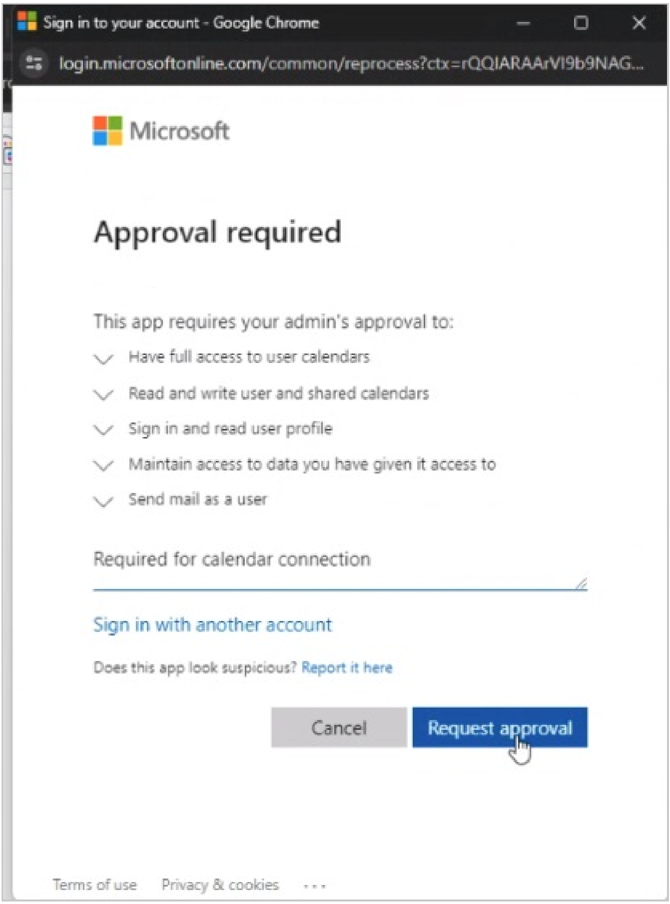
If permission isn't granted, users who already have their calendar connected will not be able to connect their email.
New users or users whose calendar has become disconnected/is in an error state will need to be reauthenticated, and won't be able to connect their calendar.

For detailed steps on how to get approval from your Microsoft administrator, read on below. This article explains two methods for requesting administrator approval for the permissions required by OnceHub.

Requesting approval as a user

An individual user requests administrator approval for OnceHub's required permissions, and permission is granted for the entire organization once this request is approved by an administrator.

1. If you are unable to connect your email due to a permission issue, you will see a pop-up like this where you can request approval:



Approval request pop-up

Note: If you cannot see the option to request approval, you can ask your admin to enable requesting approval for apps here.

2. Once you have entered your reason and sent the request for approval, get in touch with your Microsoft administrator so that they can approve your request.
3. The administrator will receive an email to review the request.
4. Your administrator will need to review the request before your email can be connected. If you are an administrator, read on below to see the steps you need to take to review a permission request.

Granting permission as an Azure administrator

Accepting permissions as an existing OnceHub user

1. As the Microsoft administrator for your account, sign into OnceHub.
2. In the **Calendar connection** settings, click **Connect your email**
3. A pop-up will open with a checkbox allowing you to **Consent on behalf of your organization**.
4. Click the checkbox, and then click **Accept**.
5. Your organization has now been granted all necessary permissions to connect OnceHub with your Microsoft 365 account.

Accepting permissions as a new OnceHub user

If you are the Microsoft administrator for your organization and not an existing OnceHub user , you can approve the OnceHub app by signing up for it.

1. Sign up for OnceHub using your Microsoft 365 account.
2. A pop-up will open with a checkbox allowing you to Consent on behalf of your organization.
3. Click the checkbox, and then click Accept.
4. Your organization has now been granted all necessary permissions to connect OnceHub with your Microsoft 365 account.

Reviewing a user's permission request as an administrator

1. The administrator clicks the **Review request** button on the permission request email.
2. Under **Pending requests**, the administrator selects **OnceHub**, and clicks **Review permissions and consent.**
3. A pop-up will open. The administrator clicks **Accept**, and the permissions request is approved.

Connect your Exchange/Outlook Calendar

Last Modified on Sep 26, 2024

Read on if you want to learn how to connect your OnceHub Account with your Exchange/Outlook Calendar.

If you want to configure your Exchange/Outlook Calendar, learn more here.

OnceHub communicates with your Exchange/Outlook Calendar using the Exchange Web Services (EWS) API, a well-established official Microsoft protocol. All credentials and data traffic are fully encrypted. Learn more about how your sign-in credentials are stored and protected by OnceHub

> **Note:**
>
> Microsoft does not support Transport Layer Security (TLS) below TLS version 1.2. Learn more about how Exchange/Outlook Calendar uses TLS

Connect to your personal Exchange/Outlook Calendar

1. Sign in to your OnceHub Account.
2. Select your profile picture or initials in the top right-hand corner → **User integration**

   > **Note :**
   >
   > If you are connected to any other calendar, you will need to disconnect first. Existing bookings that have not yet taken place will **not** be added to your Exchange/Outlook Calendar after you connect.

3. Click the **Connect** button next to Exchange/Outlook Calendar.
   Figure 1: Calendar connection
4. The **Connect to Exchange/Outlook Calendar** pop-up will appear (Figure 2).

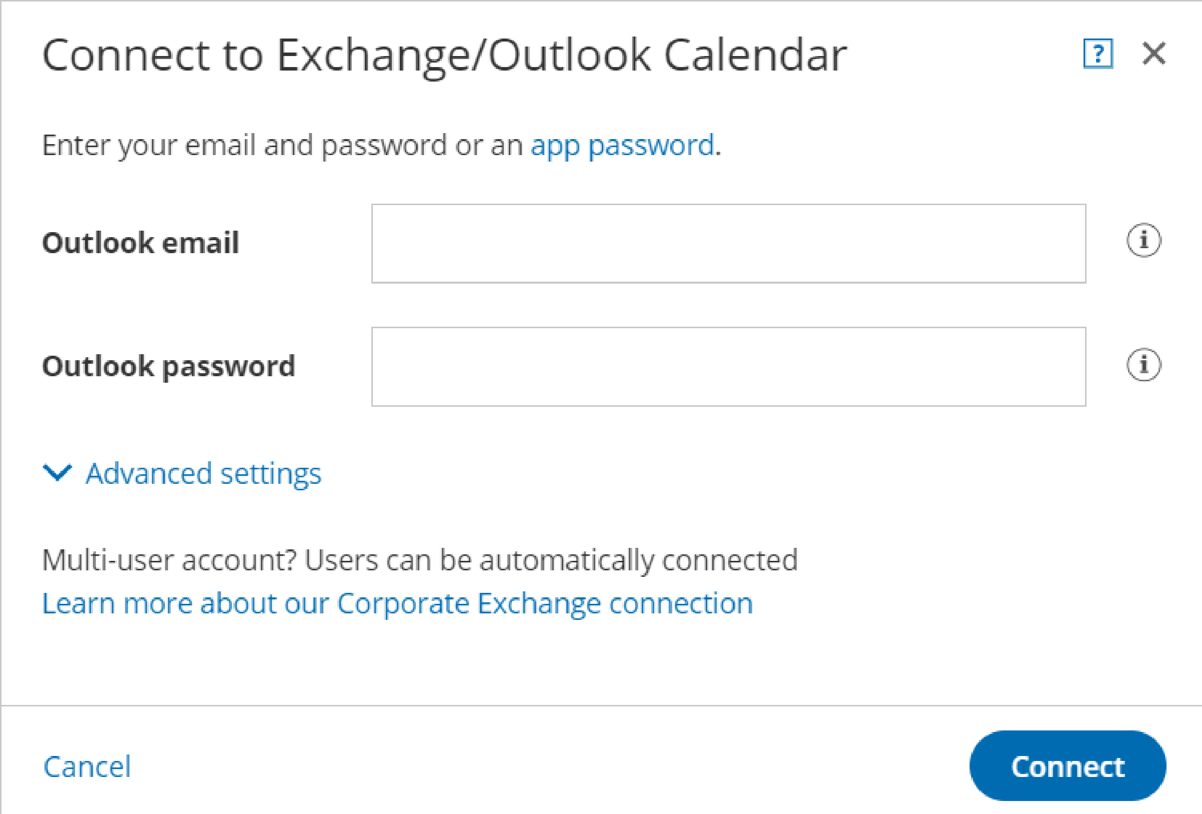


Figure 2: Connect to Exchange/Outlook Calendar pop-up

5. Enter your email address and password, as you normally would to sign into your mailbox via Outlook or any other method. Click **Connect**.
6. If the connection is successful, the pop-up closes and you should see confirmation that you are connected to your Exchange/Outlook Calendar (Figure 3).

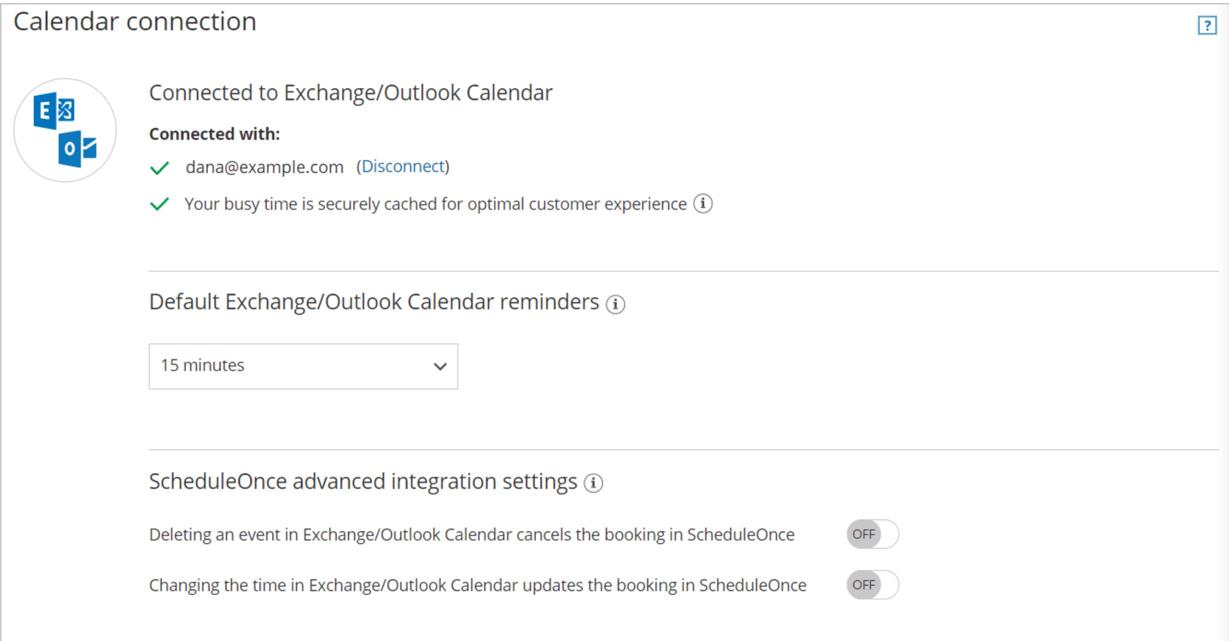


Figure 3: Connected to Exchange/Outlook Calendar

- If you're using Booking pages, you have the option to configure the **OnceHub advanced integration settings**. You can also click the **Continue setup** button in the **What's next?** section to access more options.

Exchange corporate connection

Exchange corporate connection

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Why connect with a corporate connection?

Corporate connection to Exchange provides several important advantages:

- **Security:** Only one password per account is provided to OnceHub. The credentials belong to the dedicated mailbox, which is empty and contains no sensitive information. Learn more about how your sign-in credentials are stored and protected by OnceHub
- **Centralized management:** The Exchange admin has full control over the entire account connection from the dedicated mailbox.
- **Changing password:** The admin may change the dedicated mailbox password at any time and notify OnceHub about the change, immediately renewing the calendar connection for the entire account.

The Admin maintains full control over every aspect of the calendar connection and the Members of the account keep working without interruption.

How does the corporate connection work?

In corporate mode, only one dedicated mailbox on the Exchange server is connected to the OnceHub Account, and all events are synced via the dedicated mailbox.

1. A dedicated mailbox is set up on the Exchange server by an Exchange admin.
2. All Users that accept bookings must delegate their main calendar to the dedicated mailbox. Delegation can be configured either centrally by an Exchange admin, with no action required from the Users, or by each User individually. See delegation instructions for individual Users: Delegating in Office 365 and Outlook Web App (OWA) or Delegating in Outlook client.
3. Only the dedicated mailbox is connected to the OnceHub Account, and not individual Users. OnceHub only stores one set of credentials in an encrypted format.
4. Only Users' busy time is retrieved from Exchange via the dedicated mailbox. The specific details of calendar events will remain private.
5. OnceHub bookings are added to the respective Users' calendars.

Sounds right for your account? Contact us to proceed.

If your Exchange/Outlook account is set up with 2-step verification, you must create an app password first. You can then use this special password to connect your OnceHub Account to your Exchange/Outlook Calendar.

Connection issues requiring additional information

Even if your credentials are correct, the connection might not be successful due to various Exchange configurations. If you see the following screen (Figure 4), additional information will need to be provided.

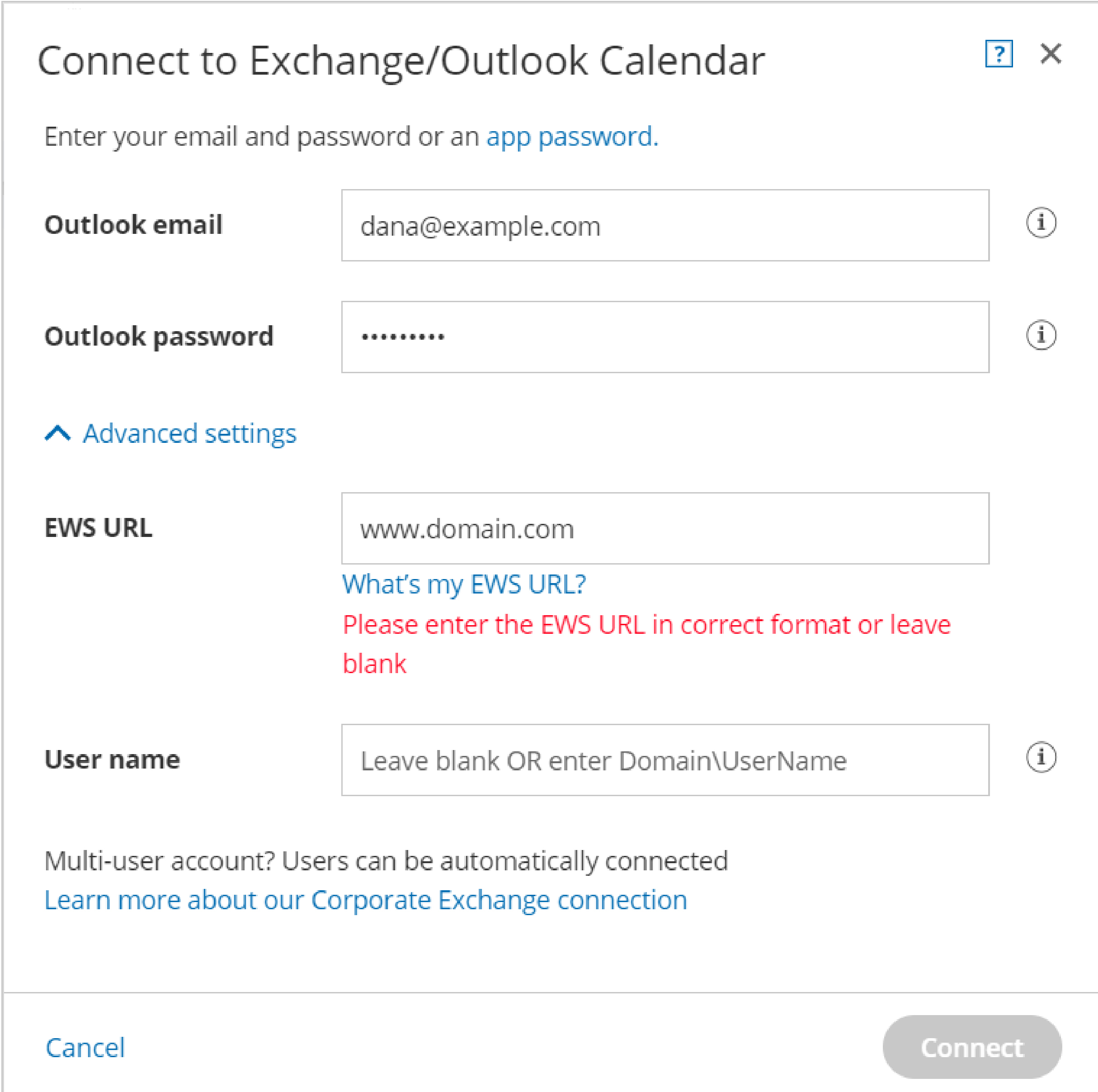

Figure 4: Connect to Exchange/Outlook Calendar with additional information

In the **EWS URL** field enter the address of your EWS in the format: **https://mail.example.com/ews/exchange.asmx** Learn how to determine the EWS URL

The value to enter in the **User name** field depends on your Exchange configuration, and can be any of these three options:

1. Leave blank—not required for many Exchange servers.
2. Try entering your email again, which some Exchange servers accept as a user name.
3. Enter your full **Domain\UserName** you would use to sign into other Windows systems:
   - Your organization's domain. Learn how to obtain the domain if you're not sure what it is.
   - Then backslash (the symbol \ and not the normal slash).
   - Then your UserName - the ID you use to access your internal systems. Learn how to obtain the UserName if you're not sure what it is.

Click the **Connect** button. If you're still not connected, make sure you have entered all the values as above, making sure all the formats and slashes are in the right places.

If the connection still fails, search your organization's internal knowledge base or contact your IT support, as there are many possible Exchange configurations and settings. Learn more about Exchange/Outlook connection troubleshooting

Using shared calendars

You can use shared Exchange/Outlook Calendars in OnceHub via your OnceHub account. Shared calendars can be used when you connect to an Exchange/Outlook Calendar via either a personal connection or a corporate Exchange connection.

Sharing calendars allows OnceHub to create bookings in and retrieve busy time from calendars that are not owned by you.

Shared calendar options

Each connected calendar in OnceHub can be used either as a main booking calendar, a calendar to retrieve busy time from, or an additional booking calendar. This can be configured for each Booking page under the Associated calendars section.

With shared calendars, the same three options apply. The only added requirement is that the calendar owner grants you the necessary permission level within Exchange/Outlook (Figure 1).

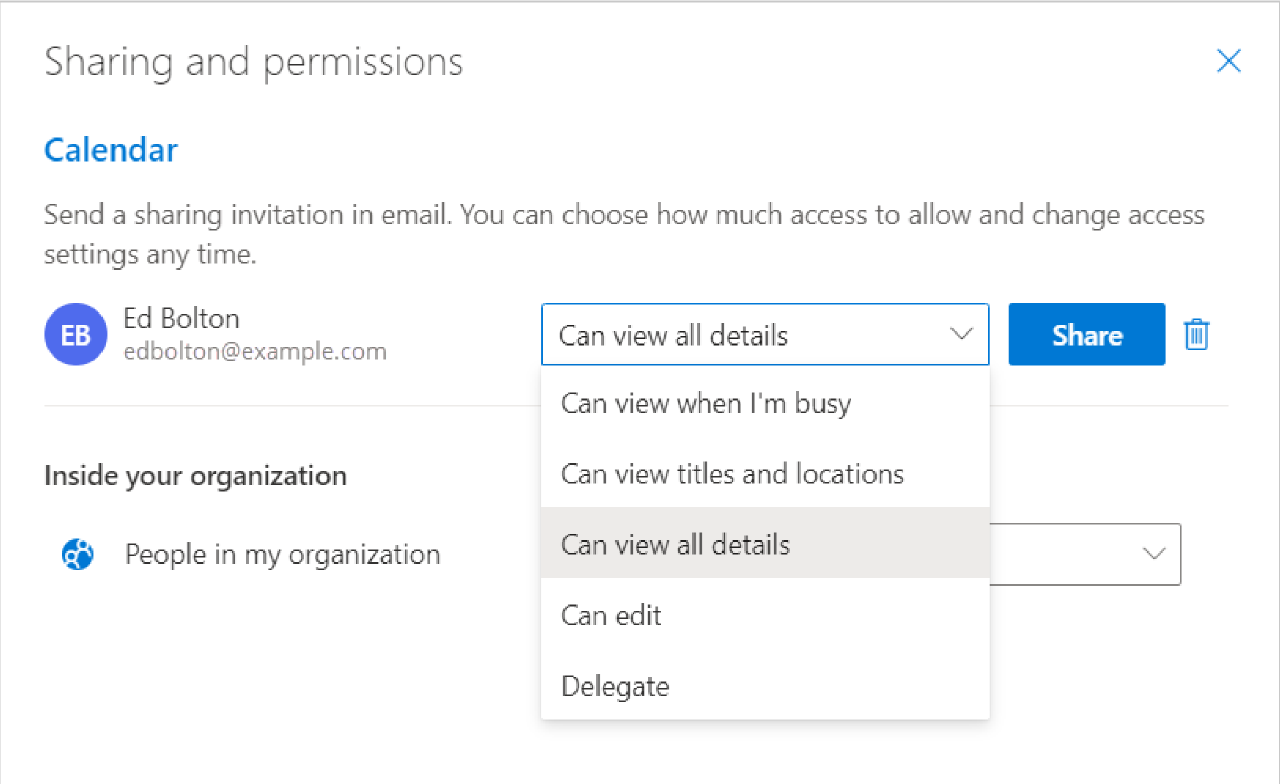

Figure 1: Sharing and permissions

- To use the calendar as a **Main booking calendar**, you must be granted Editor or Delegate permission level in Exchange/Outlook.
- To use the calendar for **Busy time retrieval**, you can be granted any permission level in Exchange/Outlook.
- To use the calendar as an **Additional booking calendar**, you must be granted Editor or Delegate permission level in Exchange/Outlook.

Which calendars can be shared?

Most Outlook calendars can be shared. Your ability to share calendars depends on the sharing policy specified by your Exchange administrator.

You can share calendars on the same domain, or share calendars across different domains. To use shared calendars on the **same domain**, follow the sharing instructions below.

To use calendars shared **across different domains**, the person given access to the shared calendar must accept the sharing by clicking the link or button in the email notification. These calendars will be automatically added to the calendar list in the Calendar section of each Booking page. You do not need to do anything else to use these calendars in OnceHub. Sharing calendars across domains requires specific settings in your Exchange/Outlook configuration.

Using shared calendars when connected with a personal connection

Follow these steps to use a same-domain shared calendar when connected with a personal Exchange/Outlook Calendar connection.

1. Ensure that the calendar owner shared their main calendar with you as Editor or Delegate. Additionally, sub calendars may also be shared. Each calendar must be shared individually.
2. Add the calendar owner's email address in the Associated calendars section of each Booking page. All calendars and sub-calendars shared with you, will appear in the calendar list.
3. Select how each calendar will be used: **Main booking calendar**, **Busy time retrieval**, or **Additional booking calendar**. If your permissions are insufficient, ask the calendar owner to change your permission level.

Using shared calendars when connected with a corporate connection

Follow these steps to use a same-domain shared calendar when connected with an Exchange corporate connection.

1. Ensure that the calendar owner shared their main calendar with your dedicated mailbox as Editor or Delegate. Additionally, sub-calendars may also be shared. Each calendar must be shared individually. Note that all corporate account members will gain access to all shared calendars.
2. Add the calendar owner's email address in the Associated calendars section of each Booking page (Figure 1). All calendars and sub calendars shared will appear in the calendar list.
3. Select how each calendar will be used: **Main booking calendar**, **Busy time retrieval**, or **Additional booking calendar**. If your permissions are insufficient, ask the calendar owner to change the permission level.

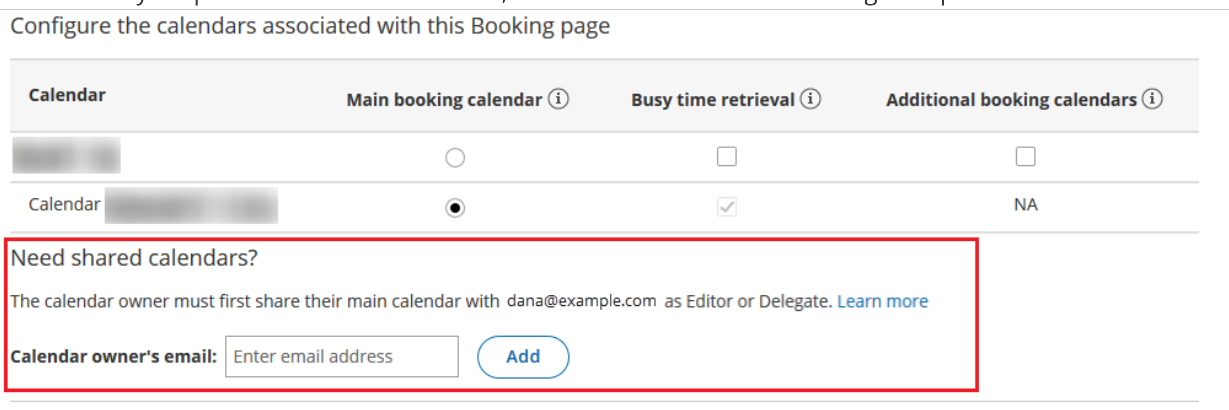

Figure 2: Associated calendars section of the Booking page

Configure your Exchange/Outlook Calendar

Last Modified on Jan 7, 2024

You might need to tweak some settings in order for your calendar integration to work the way you want it to.

If you want to connect your Exchange/Outlook calendar, read more here.

OnceHub communicates with your Exchange/Outlook Calendar using the Exchange Web Services (EWS) API, a well-established official Microsoft protocol. All credentials and data traffic are fully encrypted. Learn more about how your sign-in credentials are stored and protected by OnceHub.

Read on to learn how to adjust these settings.

> **Note :**
>
> **Do my Users need to sign into OnceHub to receive bookings?**
>
> With most calendar configurations, your Users need to sign into OnceHub in order to receive scheduled bookings. This is because they must connect their calendar to OnceHub, using their credentials.
>
> However, if your organization uses our Exchange calendar integration with corporate connection, it's possible to arrange for new Users to receive bookings with no involvement on their end. We call these 'passive users.'
>
> Although they receive an invite when the admin creates their new User in OnceHub, they can ignore this. Organizations find that allowing for passive users reduces the effort involved to start scheduling for their team and increases adoption.

Configuring Default Calendar reminders

You can configure Default Exchange/Outlook Calendar reminders in the connected Exchange/Outlook Calendar. To do so, select an option from the **Default Exchange/Outlook Calendar reminders** drop-down list (Figure 1).

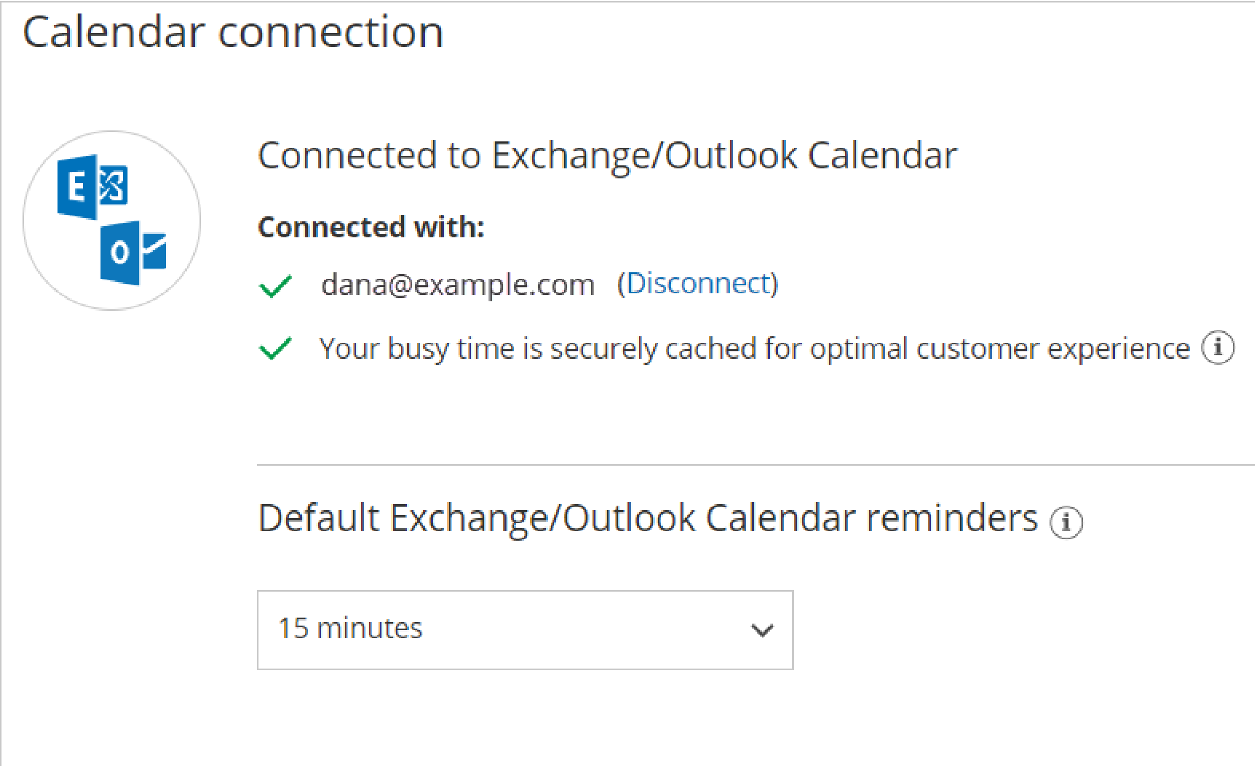

Figure 1: Default Exchange/Outlook Calendar reminders

Configuring OnceHub advanced integration settings

OnceHub allows you to cancel or reschedule bookings without leaving your personal calendar. By enabling the **OnceHub advanced integration settings** (Figure 2), changes made in your connected calendar are reflected in OnceHub. Learn more about canceling or rescheduling in Exchange/Outlook Calendar

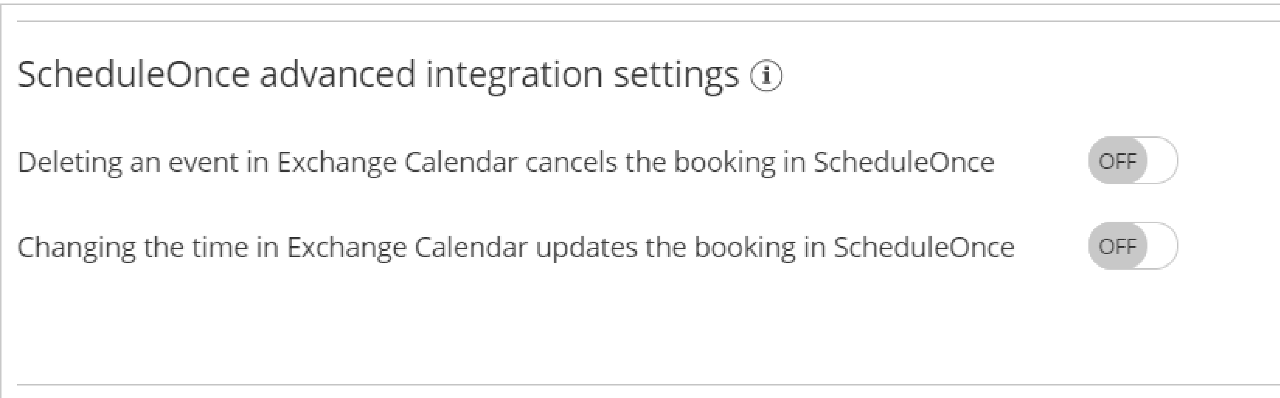

Figure 2: OnceHub advanced integration settings

Using Exchange resource calendars

If you are using Office 365 via OAuth, you can use the Exchange resource calendars for resource scheduling.

You have two options in how you use Office 365 resource calendars.

Grant permissions to a OnceHub User's calendar

1. Ensure that your Exchange Administrator grants you full read/write permissions to the resource calendars you need to use.

2. Add the relevant resource calendar(s) to your Outlook Calendar.
3. In your OnceHub account, on the left-hand side menu, click the Booking pages icon. Select the Booking page that you want to use and configure the resource calendar settings in the **Associated calendars** section**.**
4. Follow the instructions in the Resource scheduling article.

Create a OnceHub user solely for that resource

In the **Associated calendars** section of that User's booking page, the resource calendar will be the main booking calendar for that scheduled meeting.

You can also add the User to a resource pool or to a panel meeting as a panelist.

When creating a panel meeting using a room or resource, we recommend you select the resource calendar User for the **Booking assignment** field. Add other members of the panel under the **Additional team members** field.

> **Note:**
>
> If you decide to select a different User for the Booking assignment field, making that User the main panelist instead of the resource calendar User, the behavior may not be optimal.

In a panel meeting, the main panelist is the User selected in the **Booking assignment** field. The calendar event is owned by their calendar and all other panelists are added to the event as guests. Due to the way Microsoft coded their resource calendars, a resource calendar added as a guest to a calendar event will not update when an event is canceled. This will leave a blocked event on that resource calendar at the canceled time.

However, if the resource calendar User is selected in the **Booking assignment** field, it becomes the main panelist and owns the calendar event, adding all other panelists as guests. If the event is canceled, the cancellation will reflect on all calendars and the time will be freed.

Arranging bookings for passive users

1. Delegate their calendar to the dedicated mailbox

It's possible for an Exchange admin to configure delegation of calendars to the dedicated mailbox, without involving the individual Users. However, if you do not prefer this method, the individual Users will need to delegate their main calendar to the dedicated mailbox themselves.

Delegation instructions for individual Users:
Delegating in Office 365 and Outlook Web App (OWA)
or Delegating in Outlook client

Learn more about how the Exchange corporate connection works

2. Add their User profile

To add the new User profile, in the top navigation menu, select the gear icon → **Users**. Learn more

3. Assign a scheduled meetings license

Assign the new User a scheduled meetings license by going to their profile and accessing the **Overview** section. Learn more

4. Assign ownership of Booking page(s) to the User

Once you've created their Booking page(s), you can assign ownership to the User.

Setup complete

You're set! The new User can now receive bookings through their Booking page(s). They receive all relevant notifications to their profile's email address and the bookings appear in their connected calendar. Next, you can configure your Exchange/Outlook Calendar connection.

Delegation setup: Microsoft 365 or Outlook Web App (OWA)

This is a User step-by-step guide to set up delegation in your Office 365 or Outlook Web App (OWA) as part of a corporate connection to Exchange. **Follow these steps only when instructed to do so by your Exchange administrator**, because they need to make some organization-level changes before you begin to delegate.

Delegation means that you permit a dedicated Exchange mailbox to create and manage events on your behalf. You must delegate if your organization is using Exchange integration in Delegation mode. If you are using Outlook client, see Outlook client delegation guide instead.

1. Sign in to your Office 365 account and navigate to your calendar.
2. Select your main calendar in the list on the left and click Share button at the top (Figure 1).

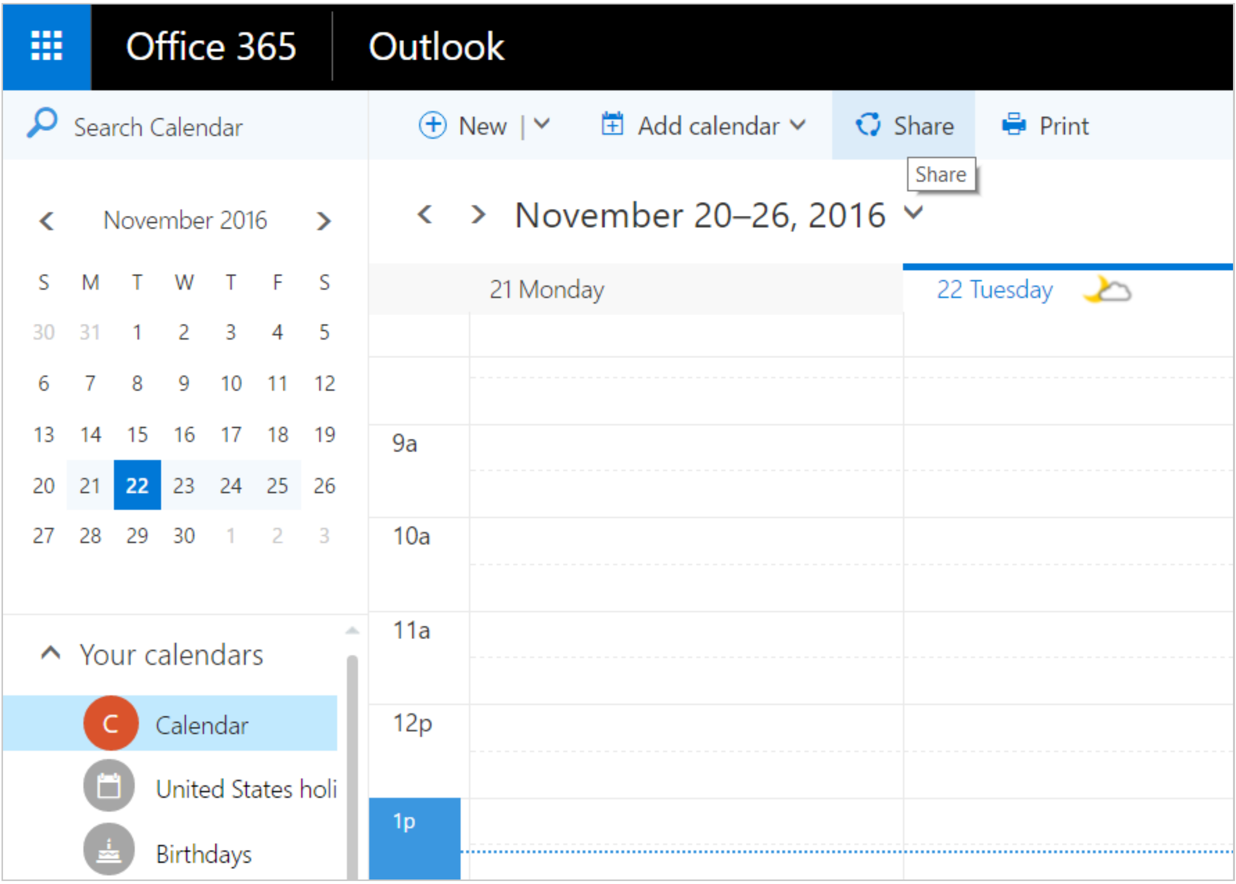

Figure 1: Select your main calendar

3. Search for the OnceHub dedicated mailbox, created by your administrator (Figure 2).

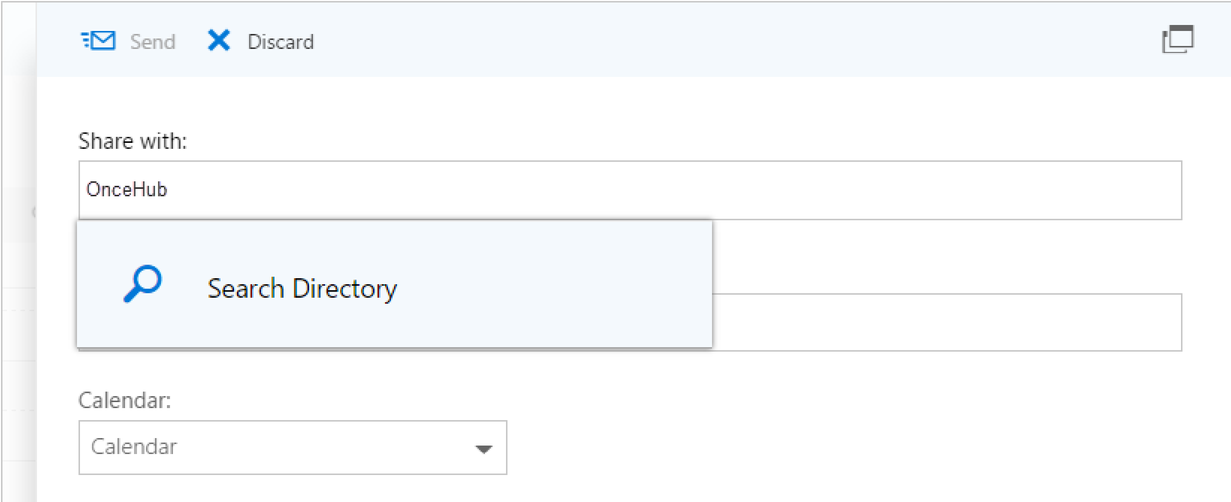

Figure 2: Search Directory

4. Select Delegate in the drop-down list and click Send button at the top (Figure 3).

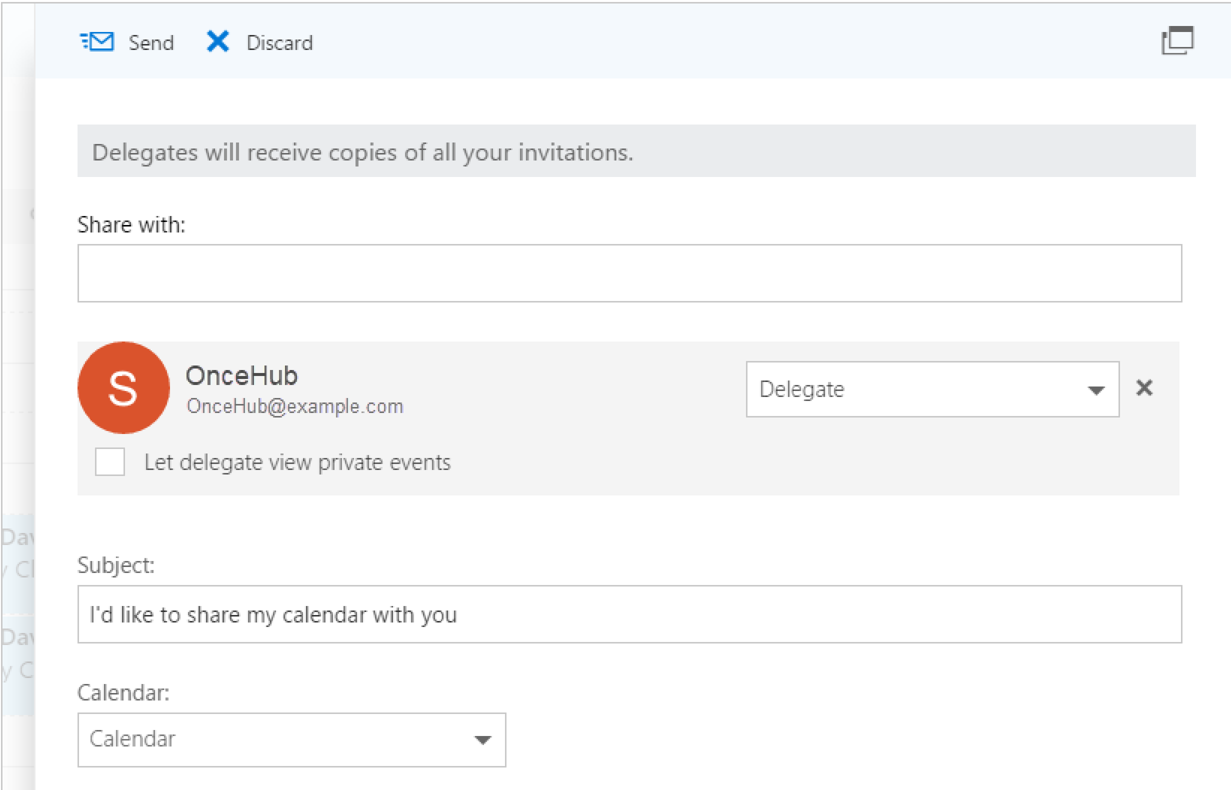

Figure 3: Select Delegate

That's it - you are done! Your calendar is delegated to the dedicated Exchange mailbox, and connected to OnceHub.

How can I set the “From” address for delegate meeting invitations?

To set the “From” address for delegate Exchange folders, an Exchange administrator can set “Send on Behalf” and “Send As” permissions for a delegated Exchange mailbox.

- **Send on Behalf** allows the delegate to select the delegator’s account in the From field. The recipient of the meeting invitation will see the following in the From field: "From: Mailbox <delegate's address> on behalf of Mailbox <your address>". "Send on Behalf" permissions can also be set by a delegator in Outlook by selecting **File->Info->Account Settings-> Delegate Access->** and select the delegate and set all Folders to None.

- **Send As** allows the delegate to send invitations that appear to come from the delegator.

Manage delegation permissions

If you need to modify your delegation permissions, right-click your calendar and select Permissions (Figure 4).

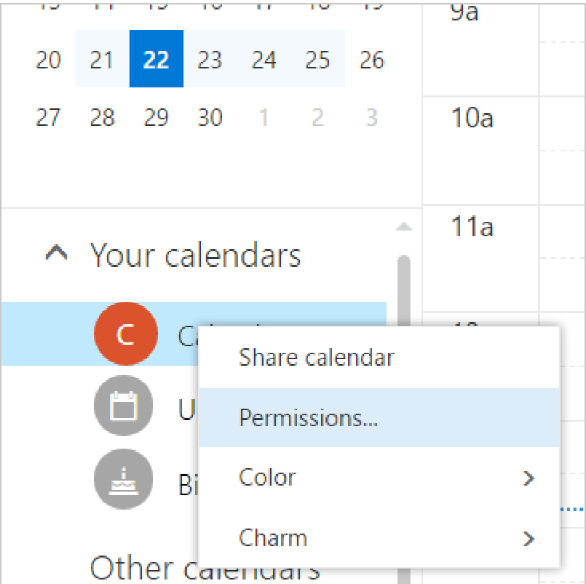

Figure 4: Select Permissions from the drop-down menu

In the Permissions window, you can modify permissions levels and remove users (Figure 5). Remember to click **Save** when done.

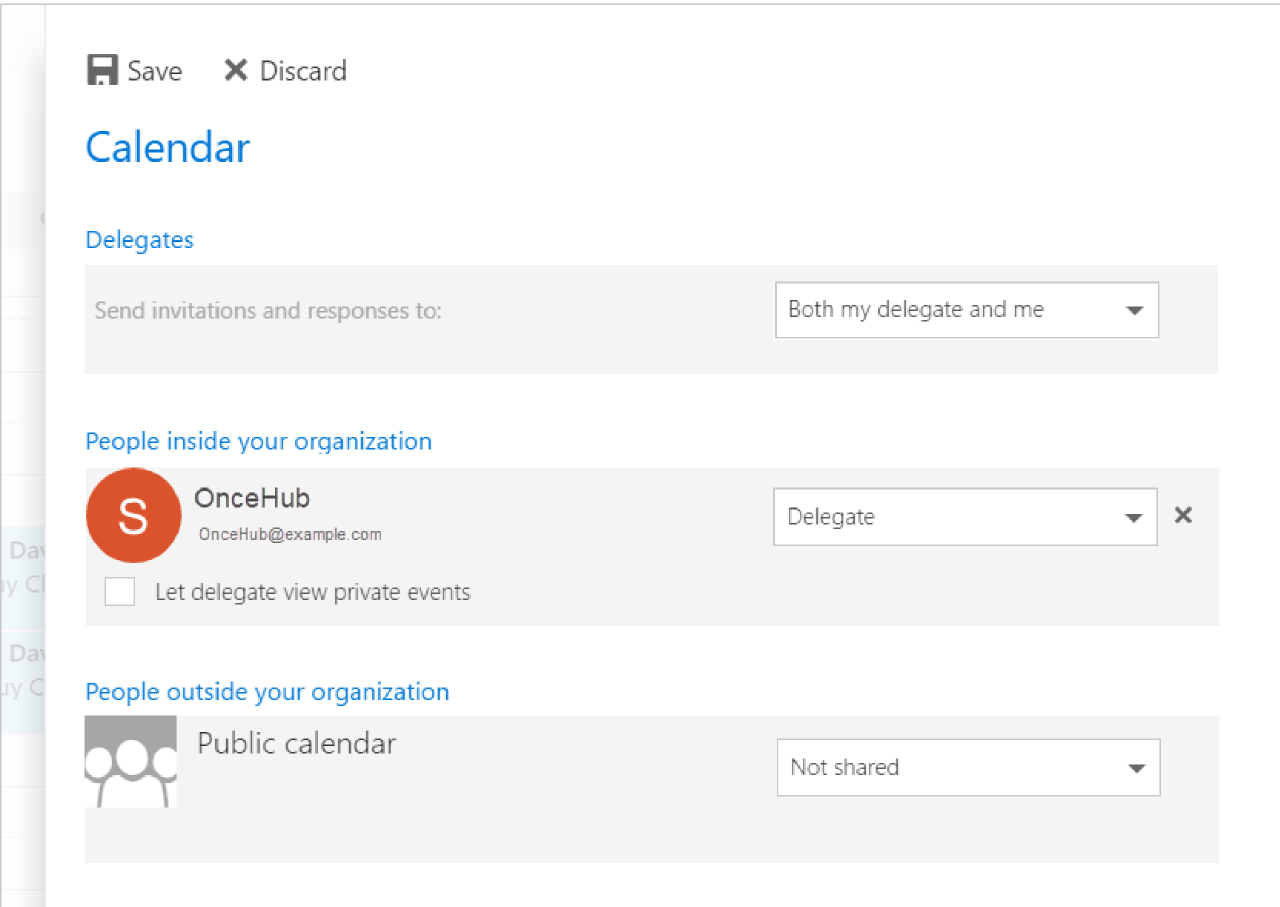

Figure 5: Modify permissions or remove users

Delegation setup: Calendar Delegation setup: Outlook desktop client

This is a User step by step guide to set up delegation in Outlook client on your PC as part of a corporate connection to Exchange. **Follow these steps only when instructed to do so by your Exchange administrator** , because they need to make some organization level setting before you begin to delegate.

Delegation means that you permit a dedicated Exchange mailbox to create and manage events on your behalf. You must delegate if your organization is using Exchange integration in Delegation mode. If you are using Office 365 or Outlook Web App (OWA) in your web browser, see the Office 365 delegation guide instead.

1. Open Outlook on your PC.
2. Click **File -> Account Settings -> Delegate Access** (Figure 1).

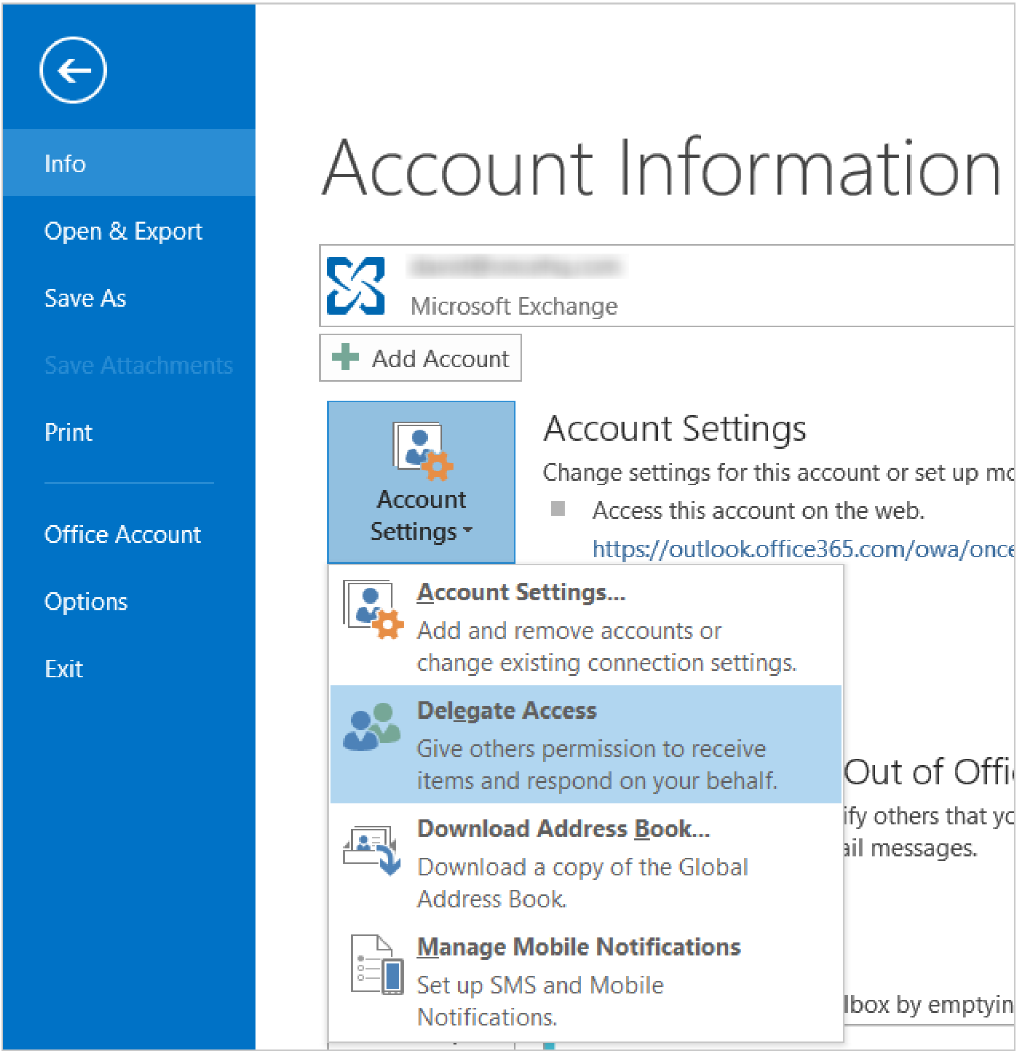

Figure 1: Delegate access

3. In the **Delegates** window click the **Add** button (Figure 2).

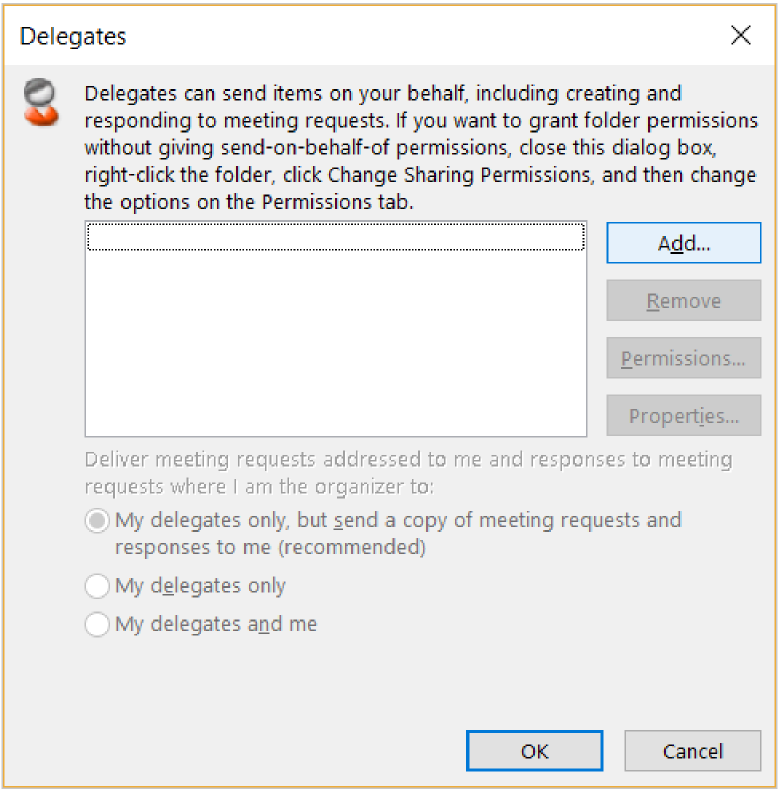

Figure 2: Add a delegate

4. In the **Add Users** window select the dedicated mailbox, OnceHub in this example (Figure 3). Click the **Add** button at the bottom and click OK. If OnceHub mailbox is not present, ask your Exchange administrator to create it first.

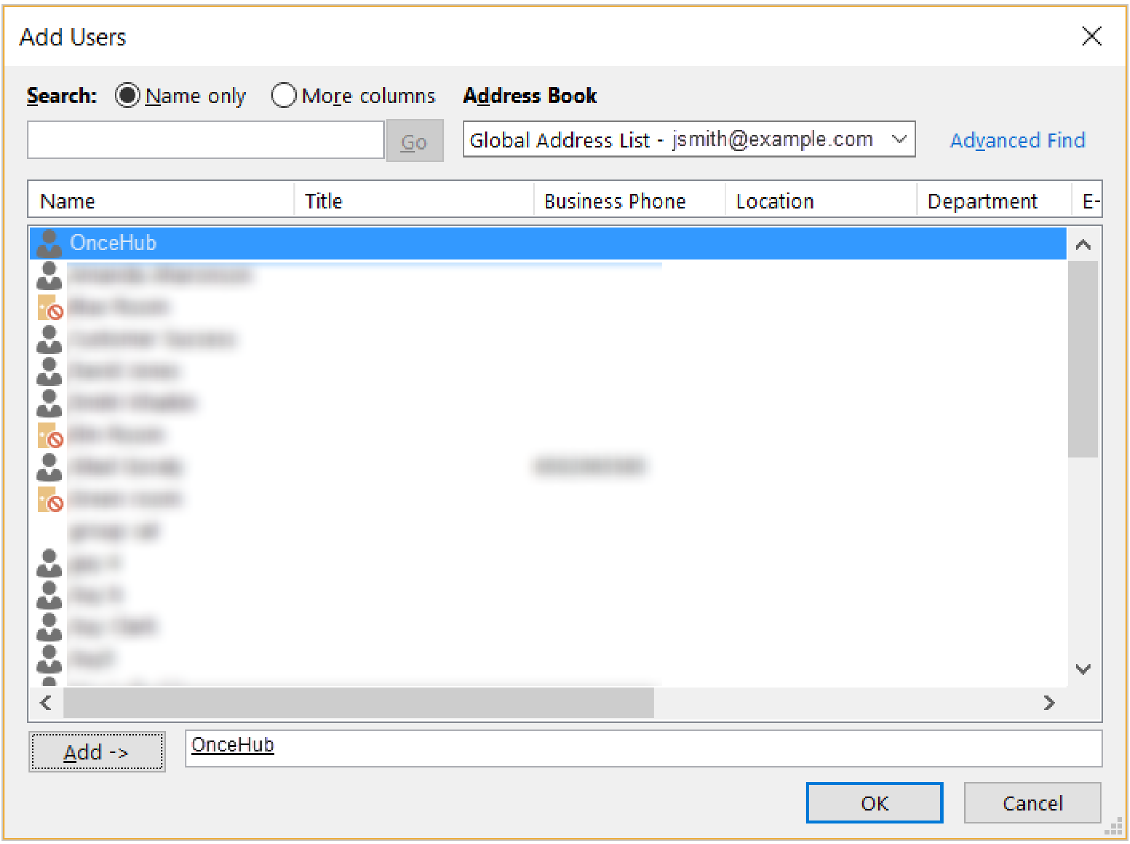

Figure 3: Add Users window

5. In the **Delegate Permissions** window (Figure 4), set the Calendar to Editor permissions. Check the "Delegate receives copies of meeting-related messages sent to me". Then click **OK**.

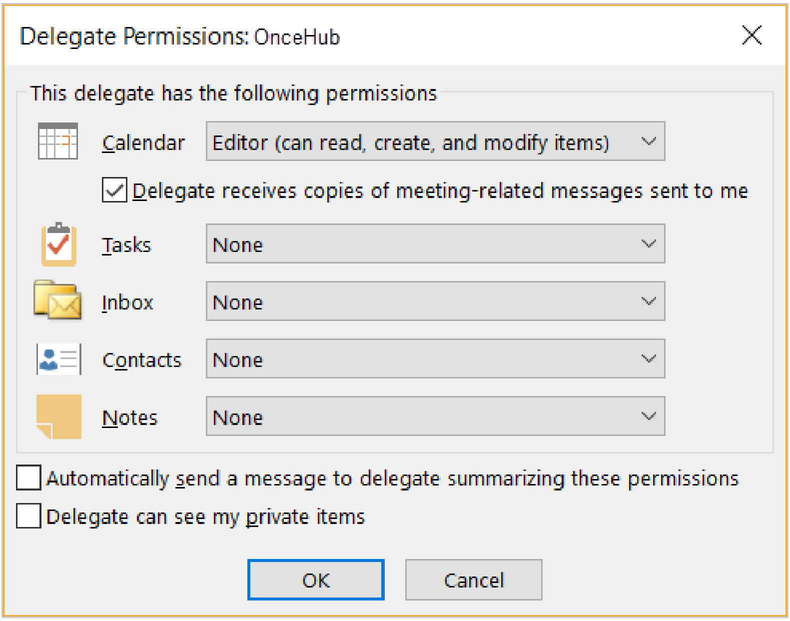

Figure 4: Delegate Permissions window

6. In the **Delegates** window (Figure 5), select the last option “My delegates and me” and click **OK**.

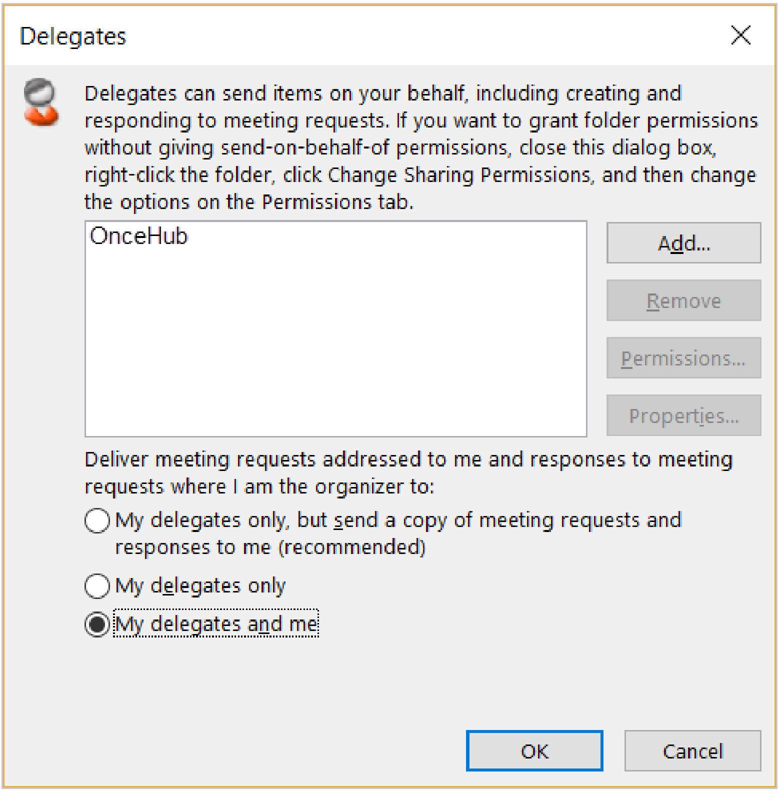

Figure 5: Delegates window with a new User added

That's it - you're done! Your calendar is delegated to the dedicated Exchange mailbox and connected to OnceHub.

When are Exchange/Outlook Calendar events treated as busy in OnceHub?

Exchange/Outlook Calendar has a number of different availability configurations. This setting can be found by editing an individual event, in the "Show as" field (Figure 1).

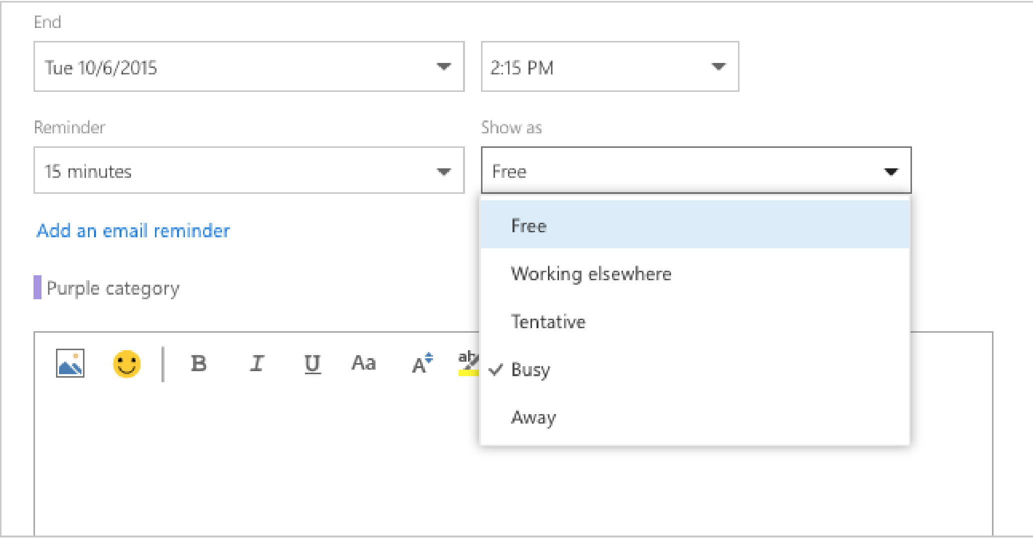

Figure 1: The "Show as" field

1. **Free:** OnceHub will not read this time as busy. This is useful when you want to indicate specific events on your calendar without having those events block your availability.
2. **Working elsewhere:**
    1. **Office 365** or **Outlook for PC** calendar integrations**:** OnceHub reads this time as busy and blocks availability.
    2. **Exchange** integration through EWS**:** OnceHub will not read this time as busy.
3. **Tentative:** OnceHub reads this time as busy and blocks availability.
4. **Busy:** OnceHub reads this time as busy and blocks availability.
5. **Away:** OnceHub reads this time as busy and blocks availability.

All-day events in Exchange/Outlook Calendar are set to Free by default. Regular events are set to Busy by default.

How to determine the EWS URL

Last Modified on Apr 5, 2023

Our integration with Exchange/Outlook Calendar requires the address of your Exchange server, called EWS URL (Exchange Web Services URL). This is usually auto-detected using your email address, but sometimes the auto-detection may fail. A common cause of failure is when your Exchange admin disabled auto-detection. In such cases, the first User of the account connecting to Exchange will need to provide the EWS URL. Additional Users of the same account will not need to provide it again.

I cannot access my email account via the browser

The easiest method to obtain the EWS URL is by logging into your mailbox (email account) via the browser. Even if you don't normally do so, but know how to do it, we recommend you try. Once in your mailbox in the browser, copy the server address or the entire URL and paste it into the OnceHub field labeled **EWS URL**.

- An Exchange email server's address may look like this: **mail.server.com**
- The entire URL of your email account may look like this: **https://mail.server.com/owa**
- You can also manually insert your server address into the format **https://mail.server.com/ews/exchange.asmx** — this is your actual EWS URL

Any of these options will work, because OnceHub will format the EWS URL for you in the background. In some rare cases, this method doesn't provide the correct EWS URL. If connection still fails, use this tool instead: Microsoft Remote Connectivity Analyzer

I cannot access my email via the browser

If you cannot access your email account via the browser, use this tool by Microsoft to discover your EWS URL: Microsoft Remote Connectivity Analyzer.

On-premises Exchange admins only

Users with access to PowerShell can obtain the EWS URL directly from the Exchange server. Open PowerShell on the Exchange server and type this command: Get-WebServicesVirtualDirectory |Select name, *url* | fl

None of the above worked

If none of these methods revealed the EWS URL, use our Exchange/Outlook Calendar troubleshooting guide. You may need to contact your internal help desk or IT department.

Testing Exchange connectivity

Last Modified on Feb 22, 2022

The Microsoft Remote Connectivity Analyzer is a useful tool for several purposes:

- Determining your EWS URL (if EWS is enabled).
- Verifying that your work email is managed on an Exchange server.
- Verifying Exchange connectivity.

Requirements

To use this tool, you'll need:

1. Your Outlook email address and password.
2. Your Domain\UserName - Enter your email in this field if Domain\UserName are not used in your organization.
    - The domain: This can usually be found in the documentation explaining how to connect a mobile phone or email client to your work mail account.
    - Your user name: This is usually the internal ID with which you log into internal systems.

Testing connectivity

Open Microsoft Remote Connectivity Analyzer and follow these steps:

1. Select the **Synchronization, Notification, Availability, and Automatic Replies** option (Figure 1).

    Figure 1: Microsoft Remote Connectivity Analyzer

2. Fill out (all fields are required): **Email, Password** and **Domain\UserName** (with a backslash). Try your email address if you don't know your Domain\UserName (Figure 2).
3. Check the "**I understand...**" checkbox (Figure 2).

    Figure 2: Enter credentials and click 'I understand...'

4. Complete the verification test and click **Verify** (Figure 3).

    Figure 3: Verify

5. Click the **Perform Test** button (Figure 3).

    Figure 3: Perform test

6. Wait for the results and verify that the connectivity icon is green.
7. Click **Expand All**.

    Figure 4: Connectivity Test results

8. Press **Ctrl + F** keys on your keyboard to open the browser's search box.
9. Type **ewsurl** (one word, no spaces).
10. Copy the **EWS URL**, located between the <EwsUrl> tags, without the tags (Figure 5).

    Figure 5: Copy your EWS URL

11. Go back to your OnceHub Account and paste the EWS URL in the appropriate field in the connection box.

Connect your iCloud Calendar

Last Modified on Sep 26, 2024

Read on if you want to learn how to connect your OnceHub Account with your iCloud Calendar.

If you want to configure your iCloud Calendar, learn more here.

Connecting OnceHub to your iCloud Calendar ensures a real-time integration between your iCloud Calendar appointments and your busy time in OnceHub. Any iCloud Calendar User can connect to OnceHub.

How to connect your iCloud calendar

1. Sign in to your OnceHub Account.
2. Select your profile picture or initials in the top right-hand corner → **User integrations**.

> **Note:**
>
> If you're connected to any other calendar, you will need to disconnect first. Existing bookings that have not yet taken place will **not** be added to your iCloud Calendar after you connect.

3. Click the **Connect** button next to **iCloud Calendar**
Figure 1: Calendar connection
4. The **Connect to iCloud Calendar** pop-up will appear (Figure 2).

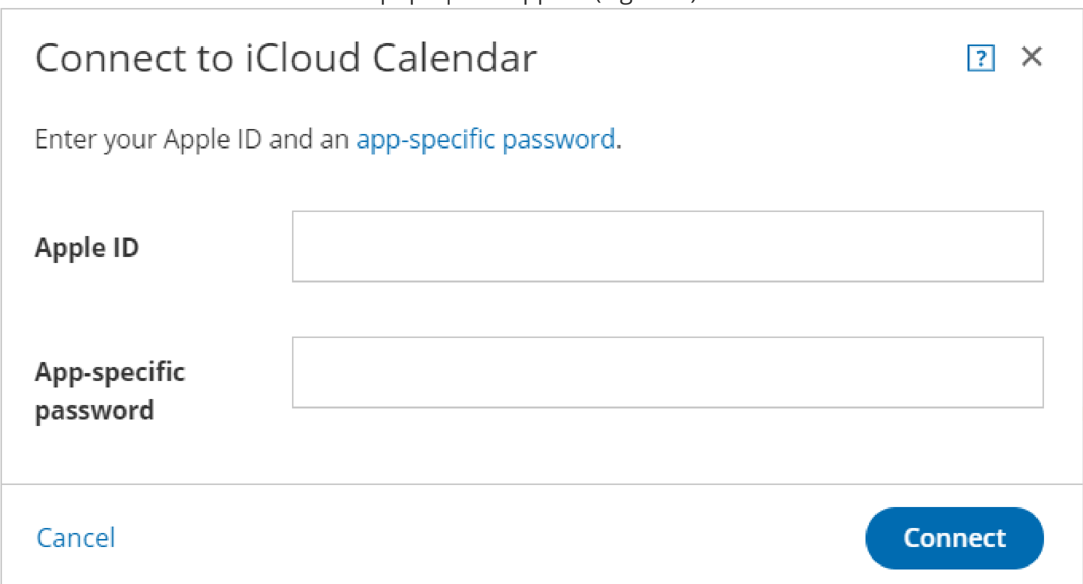

Figure 2: Connect to iCloud Calendar pop-up

5. Enter your **Apple ID** and and app-specific password. Then, click **Connect**.

> **Note:**
>
> Two-factor authentication (or two-step verification on older devices) and an app-specific password are required by Apple to connect your iCloud Calendar. Learn more about iCloud app-specific passwords

6. If the connection is successful, the pop-up closes and you should see confirmation that you're connected to your iCloud Calendar (Figure 3).

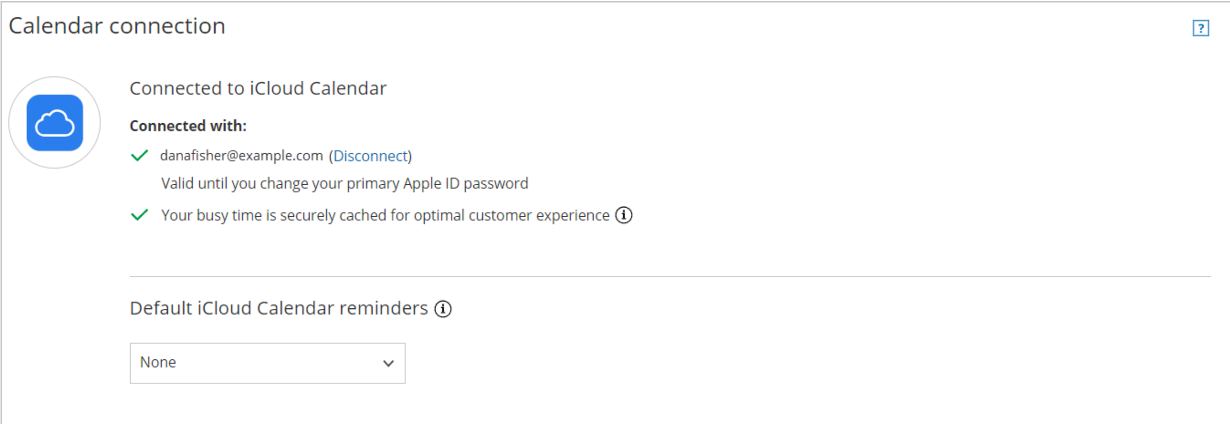

Figure 3: Connected to iCloud Calendar

In OnceHub, you can click the **Continue setup** button in the **What's next?** section to access more options.

You're all set! Your OnceHub Account and iCloud Calendar are now connected.

Configuring Default iCloud Calendar reminders

You can configure Default iCloud Calendar reminders in the connected iCloud Calendar. To do so, select your profile picture or initials in the top right-hand corner → **User integration**. Select an option from the **Default iCloud Calendar reminders** drop-down list (Figure 4).

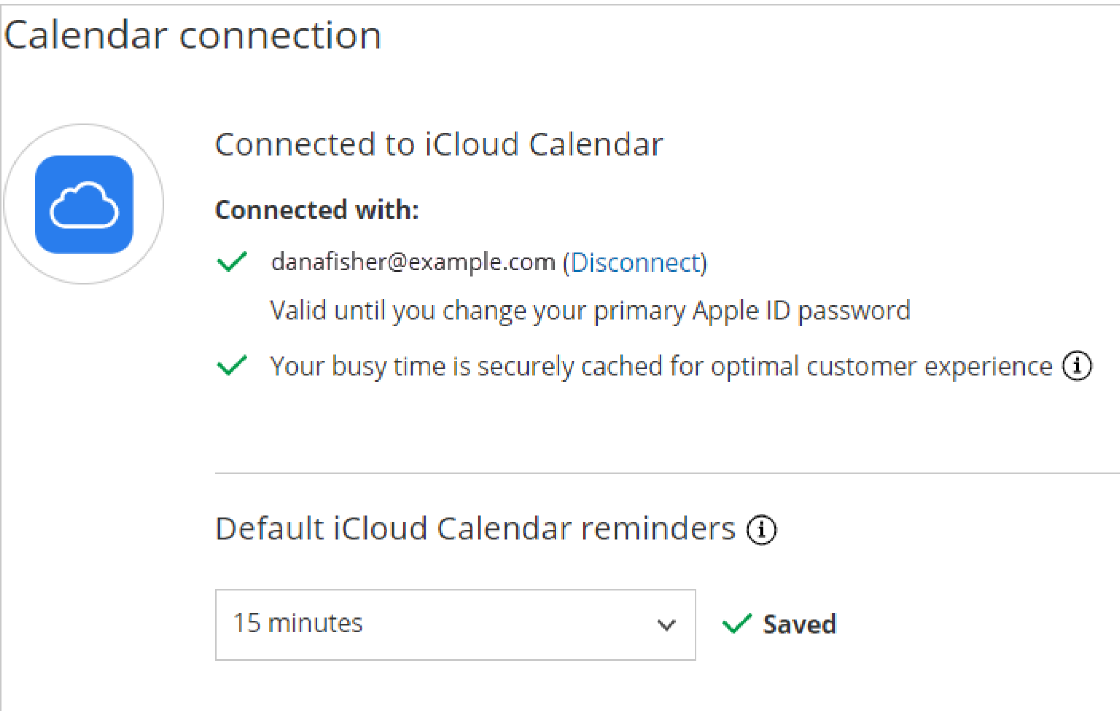

Figure 4: Default iCloud Calendar reminders

Shared iCloud Calendars

If your OnceHub Account is connected to iCloud Calendar, you can access all of the calendars under your iCloud account by hovering over the lefthand menu and selecting the Booking pages icon → Booking pages → your

Booking page → **Associated calendars.**

If you need to access an additional calendar that is not part of your iCloud account, you can ask the owner of this calendar to share it with you. Learn more about sharing calendars in iCloud Calendar

Types of shared calendars

Shared calendars in iCloud Calendar can be either public or private.

Public calendars

Public calendars can be shared with anyone who uses the following:

- The Calendar app on an iOS device or Mac.
- Microsoft Outlook on a Windows computer.
- Any other app that supports the iCalendar file format.

Only the owner of a calendar can make changes to a public calendar.

Private calendars

Private calendars can be shared with anyone who uses the following:

- Calendar on iCloud.com.
- The Calendar app on an iOS device or Mac.
- Microsoft Outlook on a Windows computer.

For private calendars, you can assign two types of access privileges to the people you invite:

- **View & Edit:** The invitee can create, edit, and delete events, and track invitation responses. Only one person can edit a shared calendar at a time.
- **View Only:** The invitee can only change their own view settings.

Required iCloud Calendar permissions

Below are the iCloud Calendar permission levels required for each type of calendar usage scenario in OnceHub.

Main booking calendar

When a booking is made, the event is automatically created in the main booking calendar and the time is automatically marked as Busy. If you want the main booking calendar to be a calendar you don't own, you will need to ask the calendar owner to share the calendar with you privately with **View & Edit** access.

Busy time retrieval

Any time marked as "Busy" in the selected calendar will automatically block time slots on the Booking page. You can retrieve busy time from calendars that you have been privately shared with you with **View & Edit** access or **View Only** access.

Additional booking calendars

When a booking is made, a separate calendar event is created in any additional booking calendar you selected. The calendar event is identical to the calendar event created in the main booking calendar, but does not include invitees.

If you want an additional booking calendar to be a calendar you don’t own, you will need to ask the calendar owner to share the calendar with you privately with **View & Edit** access.

Configure your iCloud Calendar

Last Modified on Sep 26, 2024

You might need to tweak some settings in order for your calendar integration to work the way you want it to. Read on to learn about the settings that you are able to adjust and how to make these changes.

If you want to connect your iCloud Calendar, learn more here.

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When a booking is made, the event is automatically created in the main booking calendar and the time is automatically marked as Busy. If you want the main booking calendar to be a calendar you don’t own, you will need to ask the calendar owner to share the calendar with you privately with **View & Edit** access.

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Any time marked as "Busy" in the selected calendar will automatically block time slots on the Booking page. You can retrieve busy time from calendars that you have been privately shared with you with **View & Edit** access or **View Only** access.

Additional booking calendars

When a booking is made, a separate calendar event is created in any additional booking calendar you selected. The calendar event is identical to the calendar event created in the main booking calendar, but does not include invitees.

If you want an additional booking calendar to be a calendar you don’t own, you will need to ask the calendar owner to share the calendar with you privately with **View & Edit** access.

Configuring Default iCloud Calendar reminders

You can configure Default iCloud Calendar reminders in the connected iCloud Calendar. To do so, select your profile picture or initials in the top right-hand corner → **User integration**. Select an option from the **Default iCloud Calendar reminders** drop-down list (Figure 1).

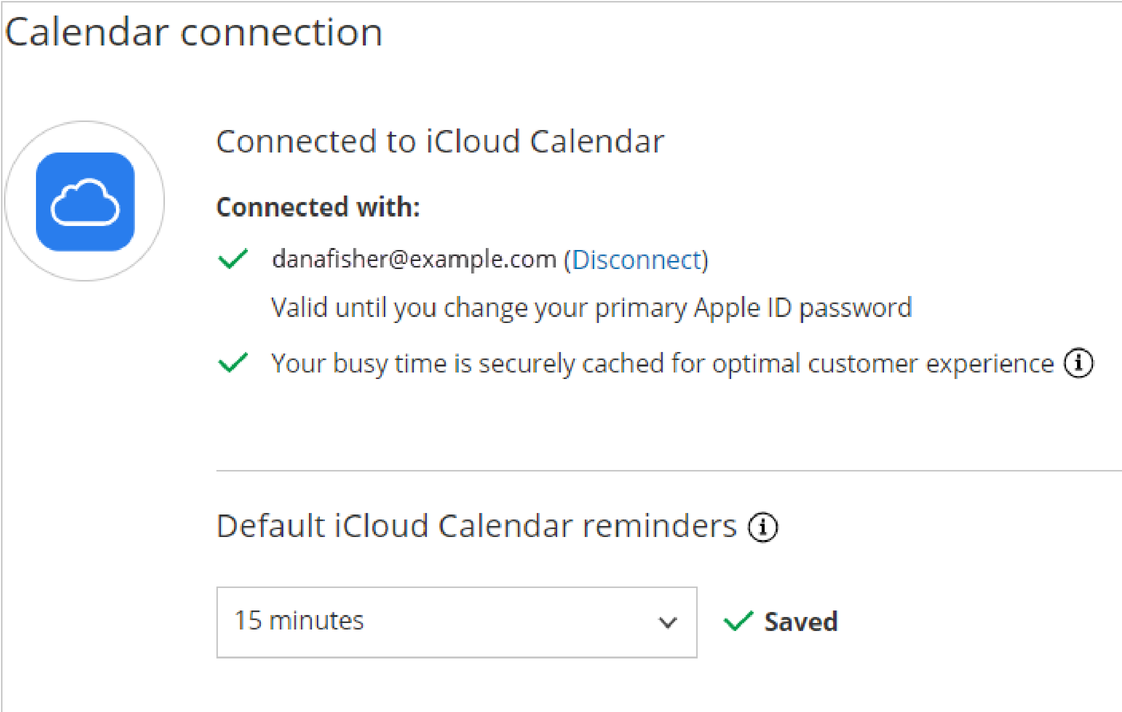


Figure 1: Adjusting default settings

When are iCloud events treated as busy in OnceHub?

Note:

For some users, the free/busy settings are NOT available on iCloud.com, on Windows PCs, or the calendar app on Macs. In this case, you can access these settings on your iPhone and iPad.

The setting for busy time in iCloud Calendar is found within calendar event details when you select an event. Click **Edit** and search for the **Show As** setting. The options for this setting are Free and Busy.

- **Free:** OnceHub will not read this time as busy. This is useful when you want to indicate specific events on your calendar without having those events block your availability.
- **Busy:** OnceHub reads this time as busy and blocks availability.

By default, all-day events are set as busy.

When are Outlook events treated as busy in OnceHub?

Last Modified on Nov 26, 2019

Outlook has a number of different availability configurations. This setting can be found in the Appointment Occurrence menu bar of each individual event, as well as within the Appointment tab in the general menu when you highlight an event (Figure 1).

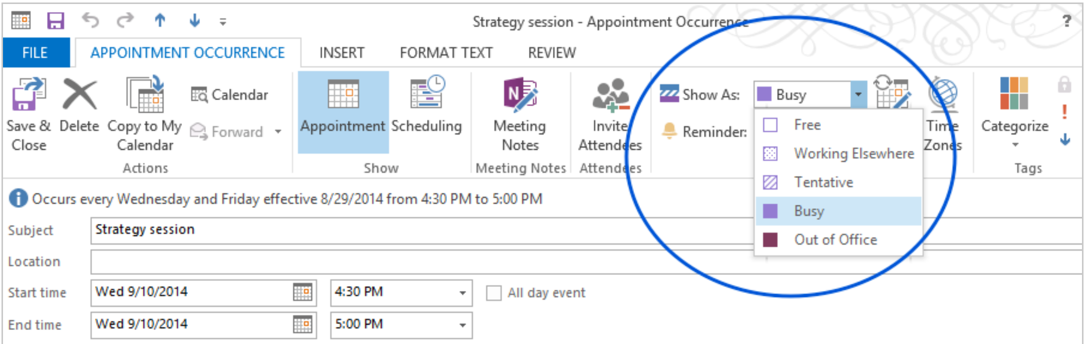


Figure 1: Appointment Occurrence menu bar

1. **Free:** OnceHub will not read this time as busy. This is useful when you want to indicate specific events on your calendar without having those events block your availability.
2. **Working Elsewhere:** OnceHub reads this time as busy and blocks availability. For an Exchange Web Services (EWS) connection, it will reflect as Free.
3. **Tentative:** OnceHub reads this time as busy and blocks availability.
4. **Busy:** OnceHub reads this time as busy and blocks availability.
5. **Out of Office:** OnceHub reads this time as busy and blocks availability.

All-day events in Outlook Calendar are set to Free by default. Regular events are set to Busy by default.

Learn more about using Outlook Calendar with ScheduleOnce

Sharing Outlook Calendars

Last Modified on Aug 27, 2019

OnceHub connects to your Outlook Calendar and allows you to access all calendars in your account. These can be local calendars, Exchange calendars, resource calendars, or any other calendars that are shared with you with full read/write permissions.

Important:

Sharing of Outlook Calendars is only possible when Outlook is used with Microsoft Exchange.

- If you need to access additional calendars that are not part of your Outlook Calendar account, you can ask owners of these Outlook Calendars to share their calendars with you. When asking people to share their calendar with you, you need to request sharing with full read/write permissions. Learn more about sharing an Outlook calendar with others.
- When configuring the Outlook connector, you select the shared calendars that you want to sync with OnceHub. Calendars that do not have a checkbox next to them are those calendars to which you do not have full read/write permissions. These calendars cannot be synced with OnceHub. If you do want to connect to one of these calendars, you can ask the calendar owner to grant you full read/write permissions to this calendar. After performing an initial sync, the Associated calendars section on your ScheduleOnce Booking page(s) will list the shared calendars that you have selected for syncing.
- From the Associated calendars section, you can select any shared calendar as your main booking calendar, retrieve busy time from it, or add it as additional booking calendar. Learn more about Associated calendars settings

Note:

The ScheduleOnce connector for Outlook is designed to manage the calendars of one person per User account. Managing more than one person's schedule through just one connector is not recommended, as the sync can be slowed considerably when multiple shared calendars are accessed, especially when using real-time sync.

This is a result of how the Outlook API is designed to retrieve information from shared Exchange calendars. Slow syncing can result in lagging performance in Outlook, crashes in Outlook or the connector, and in some cases, lost data when a connection drops before the sync was finished.

These experiences are usually a direct result of syncing too many shared calendars at once. The recommended setup for an account using Outlook integration is to create a User account for each person, connected to their personal calendar(s), in order to avoid these issues.

Connect your video conferencing app

Last Modified on Sep 26, 2024

In this article, you will learn how to connect your third-party video conferencing app to your OnceHub account.

Connecting a third-party video conferencing app

To connect a third-party video conferencing app, follow these instructions:

First, select your profile picture or initials in the top right-hand corner → **User integrations**.

You will now be able to choose which video conferencing app you'd like to use. Find the connection steps for each app below. Note that some video conferencing apps, like Microsoft Teams and Google Meet, are linked to calendar connection and will connect your calendar, email, and video conferencing at the same time.

Connecting to **Zoom**, **GoToMeeting**, and **Webex**

1. Click the **Connect button** associated with the app of your choice.
2. For **Zoom**, **GoToMeeting**, and **Webex**, this will open a pop-up window.
3. Follow the instructions to connect your account to OnceHub.

Connecting to **Google Meet**

1. For **Google Meet,** you must connect to your Google Workspace. This automatically enables Google Meet.
2. Click the **Connect** button for **Google Workspace.**
3. Follow the instructions to connect your account to OnceHub.

Connecting to **Microsoft Teams**

1. For **Microsoft Teams**, you will need to connect through Microsoft 365.
2. Click the **Connect** button for **Microsoft 365 Calendar via OAuth**.
3. The Microsoft 365 Account sign-in page will open in a new pop-up tab. If you are already signed in, your browser will detect this and ask you to confirm. If you are not signed in, you will need to sign into your Microsoft 365 Account.
4. Click **Allow** to authorize OnceHub to access your Microsoft 365 Account.
5. You'll be redirected back to the OnceHub **Calendar connection** page, where you'll see confirmation of your Microsoft Teams connection and advanced integration settings.

> **Note:**
>
> If your Microsoft Teams account is not connected automatically, this could be because your Microsoft 365 administrator has not signed up for Microsoft Teams or has deactivated Microsoft Teams for your specific Microsoft 365 license. Learn more.
>
> Your credentials are known to Microsoft only, and are never stored in OnceHub. OnceHub communicates with Microsoft using an encrypted OAuth 2.0 connection

Connecting to **Skype**

Our Skype integration completely automates the provisioning of Skype sessions. Customers receive a single OnceHub confirmation email including all of the meeting details in their local time zone.

All users connected to a Microsoft 365 Calendar using OAuth 2.0 who associate the same Microsoft ID with Skype can use Skype video conferencing automatically, with no further integration required.

1. Select your profile picture or initials in the top right-hand corner → **User integrations**.
2. Connect to **Microsoft 365 Calendar** by clicking the **Connect** button (Figure 1).
   Note that there is no reference to Skype when connecting to Microsoft 365 through OAuth. However, the Skype integration will connect if your Microsoft ID uses Skype instead of Microsoft Teams.

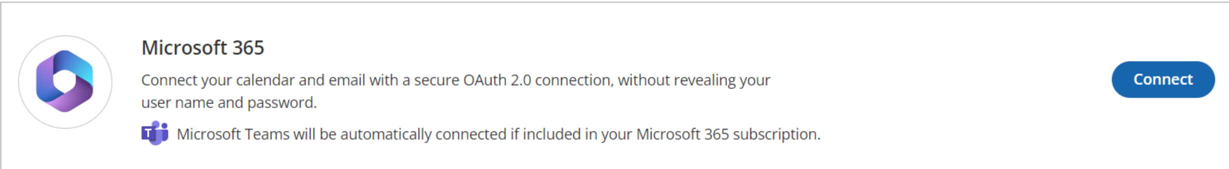
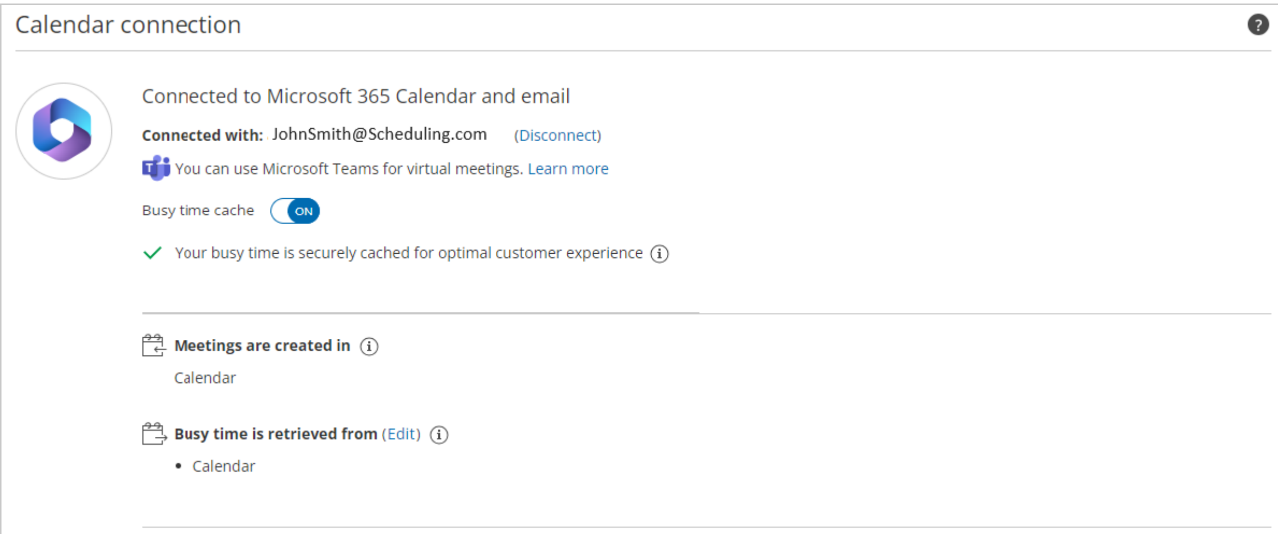
   

   Figure 1: Connecting your Microsoft 365 calendar

3. The Microsoft 365 Account sign-in page will open in a new pop-up tab.
4. If you are already signed in, your browser will detect this and ask you to confirm. If you are not signed in, you will need to sign into your Microsoft 365 account.

   > **Note:**
   >
   > Your credentials are known to Microsoft only, and are never stored in OnceHub. OnceHub communicates with Microsoft using an encrypted OAuth 2.0 connection.

5. Click **Allow** to authorize OnceHub to access your Microsoft 365 Account.
6. You'll be redirected back to the OnceHub **Calendar connection** page, where you'll see confirmation of your Skype connection and advanced integration settings.



Congratulations! OnceHub is now connected to your Skype account. Next, you can configure your booking pages to use Skype.

> **Note:**

If your Microsoft Teams account connects instead of Skype, log out of your Microsoft 365 account and sign into an account that does not have Microsoft Teams connected. If the email associated with that account has a Skype ID, it will connect automatically to Skype.

Integrate your video conferencing app

Last Modified on Jan 7, 2024

OnceHub allows you to integrate third-party video conferencing software within the app, which completely automates the provisioning of video meetings.

Integration is available with the following third-party platforms:

- Zoom
- Google Meet
- Microsoft Teams
- GoToMeeting
- Skype
- Webex

Benefits of each video conferencing app

Available features differ slightly between apps. You can use the chart below if you need help figuring out which app is the right fit for you.

	Zoom	**Google Meet**	**Microsoft Teams**	**GoToMeeting**	**Skype**	**Webex**
Features						
Schedule one-on-one meetings and group sessions	Yes	Yes	Yes	Yes	Yes	Yes
Automatic calendar integration	No	Yes (Google Calendar)	Yes (Office 365 Calendar)	No	Yes (Office 365 Calendar)	No
Automatically create and update sessions through OnceHub	Yes	Yes	Yes	Yes	Yes	Yes
Automatically generate integrated notifications (your customers will receive a single confirmation from OnceHub with all required information)	Yes	Yes	Yes	Yes	Yes	Yes

Configure by Booking page (ability to access video conferencing settings via OnceHub)	Yes	Yes	No	Yes	No	Yes
Integrated canceling and rescheduling	Yes	Yes	Yes	Yes	Yes	Yes
Booking reassignment	Yes	Yes	Yes	Yes	No	No

Configure your booking pages for use with your video conferencing app

Last Modified on Jan 7, 2024

In this article, you will learn how to configure your booking pages for use with your video conferencing app.

Our integration with video conferencing apps automatically creates meetings in your third-party app. Customers receive a single OnceHub confirmation, including all meeting details in their local time zone. You can configure your Booking pages to use the video call app by editing the **Conferencing / Location** section of the Booking page.

Connect OnceHub to your third-party video conferencing app first, and then follow these steps:

1. Hover over the left hand menu and go to the Booking pages icon → Booking pages → relevant Booking page → **Conferencing / Location** (Figure 1).

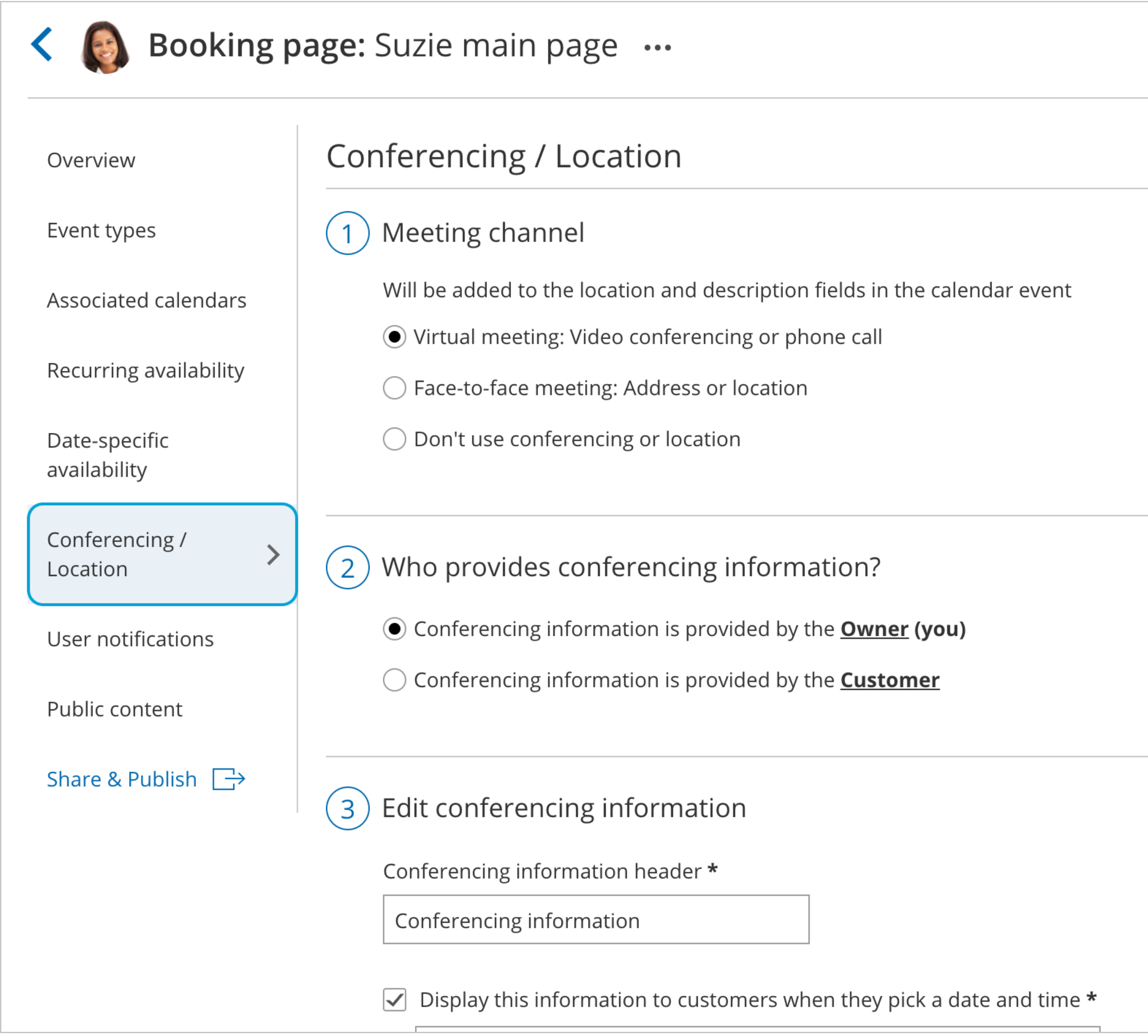


Figure 1: Conferencing / Location section

2. In the **Meeting channel** step, select **Virtual meeting: Video conferencing or phone call**.
3. For **Who provides conferencing information?** step, select **Conferencing information is provided by the Host (you)**.

4. To **Edit conferencing information** step, select the third-party video conferencing app you wish to use. (Figure 2).

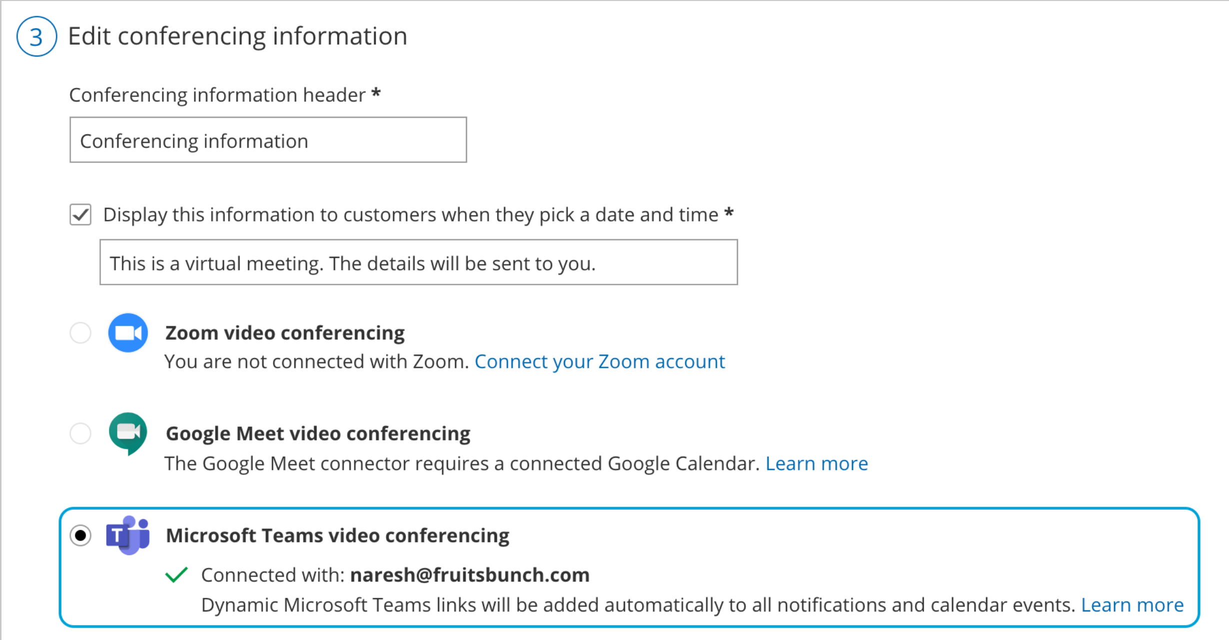


Figure 2: Available video conferencing apps with Microsoft Teams video conferencing selected.

5. Click **Save**.

Using Session packages with video conferencing

When you use Session packages, each session includes its unique video conferencing details.

- Schedule and reschedule notification emails that are sent to a Customer include a Conferencing info link next to each selected time.
- When the Customer clicks on the link, the scheduling confirmation page opens as if a single booking was made, displaying the full booking details including the video conferencing information for the session.
- Every reminder that the Customer receives includes the full booking details including the video conferencing information, as if a single booking was made.
- All calendar events for the Host and Customer include the complete video conferencing information for each session.

Note:

OnceHub recommends working with a connected calendar. Learn more about the differences between working with a connected calendar vs. working without a connected calendar

Setting the number of participants for a video conferencing session

1. Connect OnceHub to your video conferencing app.
2. Select your video conferencing app in the **Conferencing / Location** section for your Booking page.
3. Go to the Scheduling options settings of your Booking page or Event type.
   - If you have associated your Booking page with at least one Event type, the Scheduling options are found by going to the relevant **Event type → Scheduling options.**

- If you have **not** associated your Booking page with at least one Event type, the Scheduling options are found by going to the relevant **Booking page → Scheduling options.**

4. In the **One-on-one or Group session?** field, select Group session.
5. Use the drop-down menu to select the number of Customers you want to allow to attend.
6. Click **Save**.

Note:

The number of bookings per time slot set in OnceHub should not exceed your video conferencing app plan's meeting capacity.

You're all set! When a booking is made, the session details for your selected video conferencing app are integrated with all OnceHub notifications and the appropriate session will be automatically created. A video call will be automatically created based on the settings you selected. When multiple Customers sign up for the same session, such as a webinar, each booking receives the same video call details.

Learn more about using OnceHub to schedule webinars and classes

Introduction to OnceHub for Gmail

Last Modified on Oct 18, 2022

The OnceHub for Gmail extension enables you to schedule meetings directly from your Gmail account. OnceHub for Gmail gives you instant access to all of your Booking page links without the need to change apps. You can create personalized links or one-time links, copy them in a single click, and send them in an email.

Installing OnceHub for Gmail

You can install the OnceHub for Gmail extension from the Chrome Web Store. After installing OnceHub for Gmail, you'll be able to seamlessly schedule a meeting without the need to open OnceHub.

Learn more about installing OnceHub for Gmail

Sending Personalized links using OnceHub for Gmail

You can use OnceHub for Gmail to create Personalized links for your Booking pages and Master pages. You can use Personalized links to personalize the scheduling experience for prospects and Customers. When you send a Customer a Personalized link, they will pick a time to schedule the meeting without having to re-enter their contact information.

Learn more about sending Personalized links using OnceHub for Gmail

Sending one-time links using OnceHub for Gmail

You can use OnceHub for Gmail to create one-time links for your Master pages. One-time links are good for one booking only, eliminating any chance of unwanted repeat bookings. A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page.

Learn more about sending one-time links using OnceHub for Gmail

OnceHub for Gmail FAQs

Read our OnceHub for Gmail FAQs for answers to common questions about the OnceHub for Gmail extension.

Troubleshooting OnceHub for Gmail

Read our OnceHub for Gmail troubleshooting article for solutions to common issues.

Uninstalling OnceHub for Gmail

Read our instructions for uninstalling the OnceHub for Gmail Extension article.

Installing OnceHub for Gmail

Last Modified on Oct 18, 2022

The OnceHub for Gmail extension enables you to schedule meetings directly from your Gmail account. OnceHub for Gmail gives you instant access to all of your Booking page links without the need to change apps. You can create personalized links or one-time links, copy them in a single click, and send them in an email.

In this article, you'll learn how to install OnceHub for Gmail.

Installing OnceHub for Gmail

Note :

OnceHub for Gmail is only available for Chrome.

1. Go to the Chrome Web Store listing for OnceHub for Gmail.
2. Click **Add to Chrome** (Figure 1).

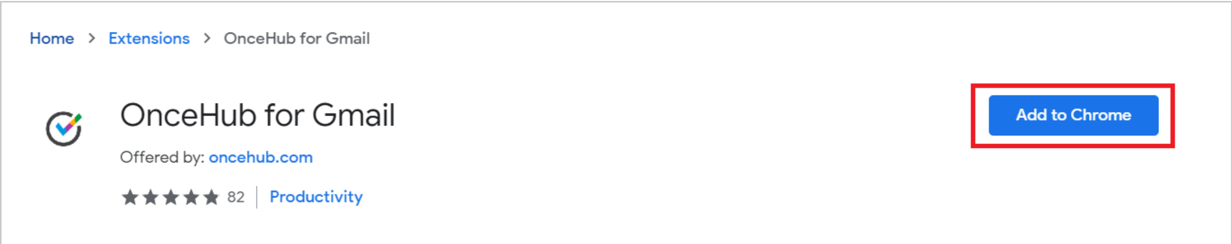


Figure 1: Add to Chrome

3. The installation permissions pop-up will appear.
4. Click **Add Extension** (Figure 2).

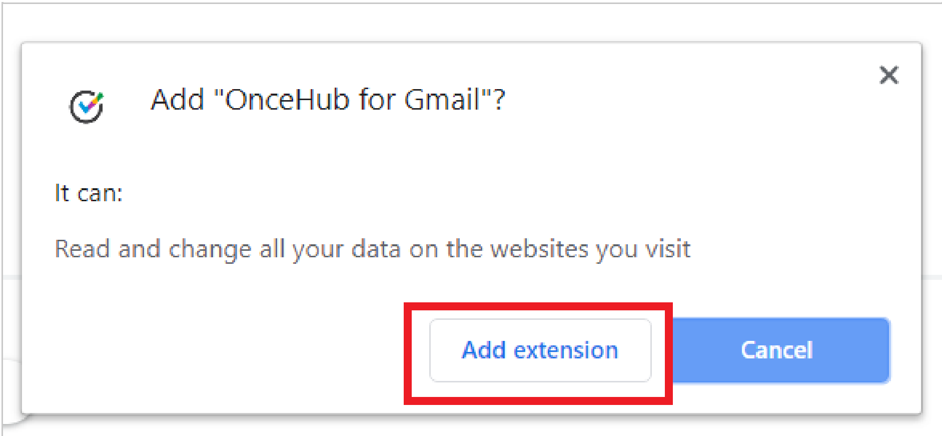


Figure 2: Add Extension

5. Once installed, you will see the OnceHub for Gmail confirmation screen. **(Figure 3)**

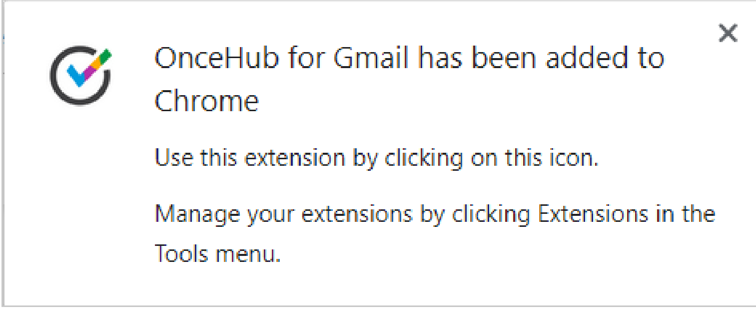


Figure 3: Confirmation

Activating OnceHub for Gmail

1. To activate OnceHub for Gmail, you will need to close and re-open Chrome.

2. Sign in to your Gmail account and compose a new email. You will see that the OnceHub for Gmail icon now appears on the bottom menu of your new email **(Figure 4).** Click on the icon.

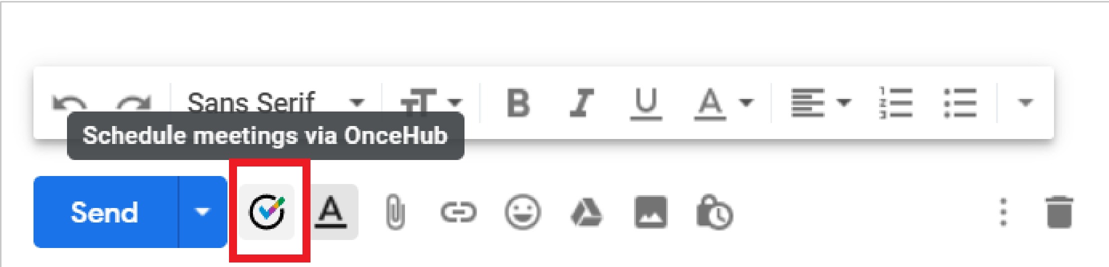


Figure 4: OnceHub for Gmail icon in your email

3. Once you have clicked on the OnceHub for Gmail icon, a pop-up screen will appear on the left-hand side of your screen instructing you to sign into your OnceHub account or start a free account.

4. Sign in to your OnceHub account.

You're all set! You can now have access to your Booking pages and Master pages inside Gmail and can create personalized links or one-time links.

Learn more about sending Personalized links using OnceHub for Gmail

Learn more about sending one-time links using OnceHub for Gmail

Sending Personalized links using OnceHub for Gmail

Last Modified on Oct 18, 2022

The OnceHub for Gmail extension enables you to schedule meetings directly from your Gmail account. OnceHub for Gmail gives you instant access to all of your Booking page links without the need to change apps.

In this article, you'll learn about sending Personalized links using OnceHub for Gmail.

Understanding Personalized links

Each Booking page and Master page has its own unique Public link that can be shared with your prospects and Customers. When you personalize the scheduling experience for your prospects and Customers, they only have to pick a time without having to provide information that you already have.

When you create a Personalized link using OnceHub for Gmail, the Customer's name and email address is automatically taken from the email. When the Customer uses the Personalized link to schedule a meeting, they only need to choose a date and time, then confirm the meeting. The Booking form is skipped and they will not have to provide their name and email address.

Learn more about using Personalized links

Note :

You can also send one-time links using OnceHub for Gmail.

Learn more about sending one-time links using OnceHub for Gmail

Requirements

To send Personalized links using OnceHub for Gmail, you must:

- Install OnceHub for Gmail.
- Have a scheduled meetings User license.
- Create a Booking page in your OnceHub account.

Sending Personalized links using OnceHub for Gmail

When you generate a Personalized link using OnceHub for Gmail, the link is automatically personalized using the "To" field in the email you are composing.

If you have more than one email address in the "To" field, OnceHub for Gmail lets you confirm the details of the Personalized link before you copy it (Figure 1). By default, the **Customer name** and **Customer email** are taken from the first email address in the "To" field.

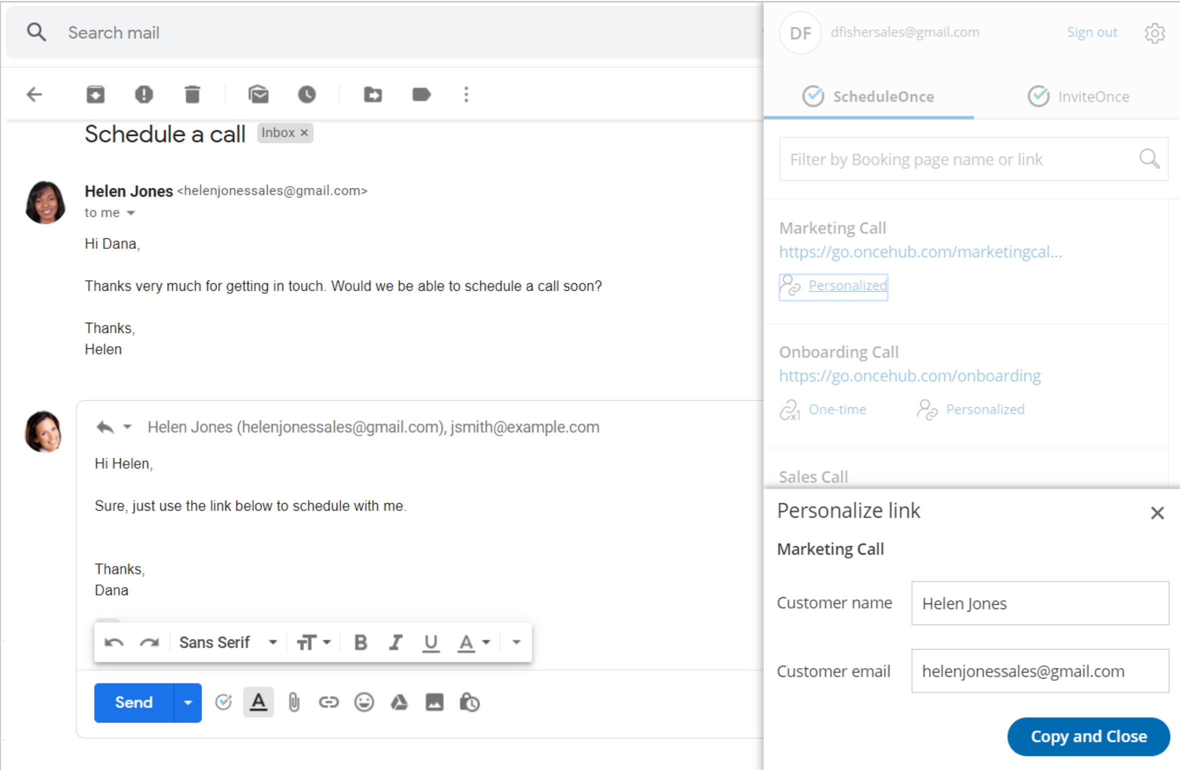


Figure 1: Confirming the details of a Personalized link

When replying to an email

1. Sign in to your Gmail account.
2. Open the email that would like to reply to.
3. Click **Reply**.
4. Click the OnceHub for Gmail icon (Figure 2).

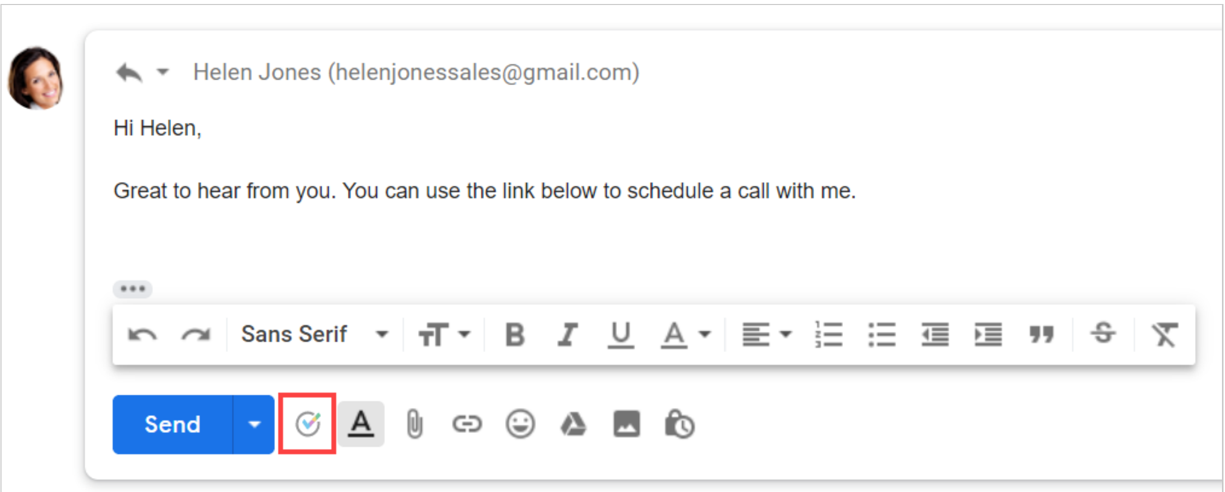


Figure 2: OnceHub for Gmail icon

5. The OnceHub for Gmail extension window will open (Figure 3).

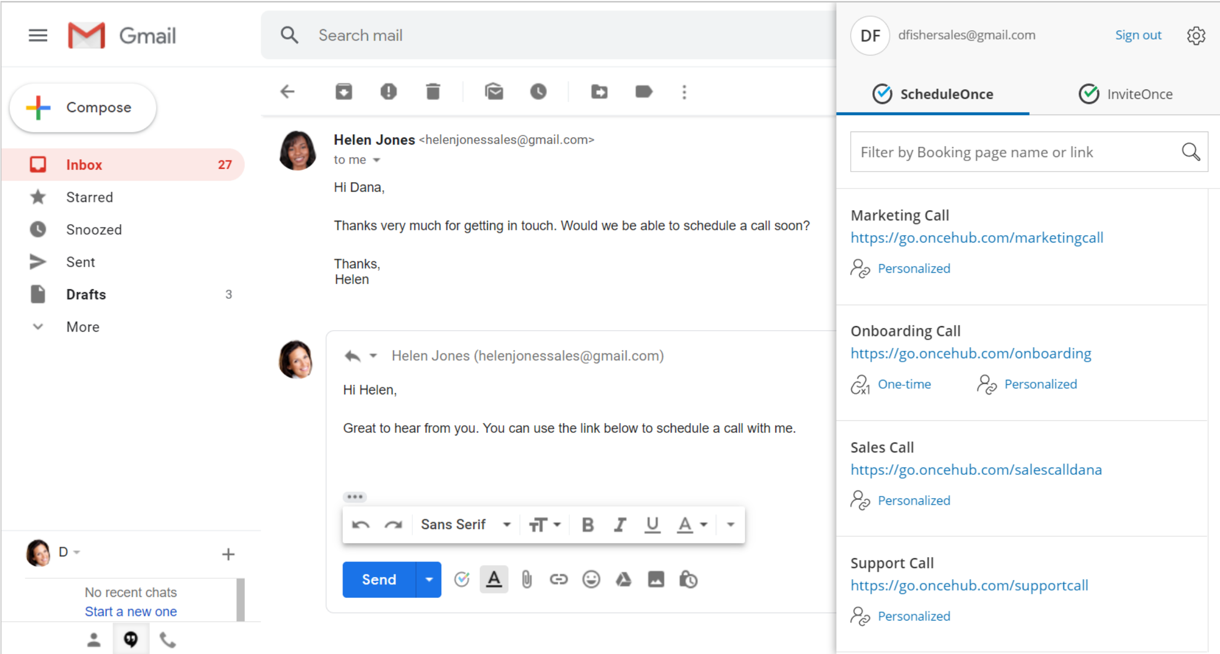


Figure 3: OnceHub for Gmail extension window

6. Click **Personalized** next to the Booking page you want to share (Figure 4).

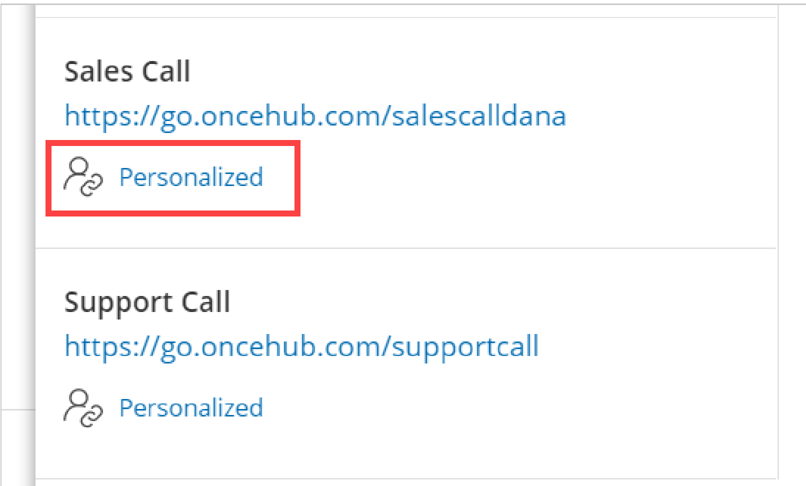


Figure 4: Generating a Personalized link

7. You will see the **Copied** confirmation when the link has been generated and copied to your clipboard (Figure 5).

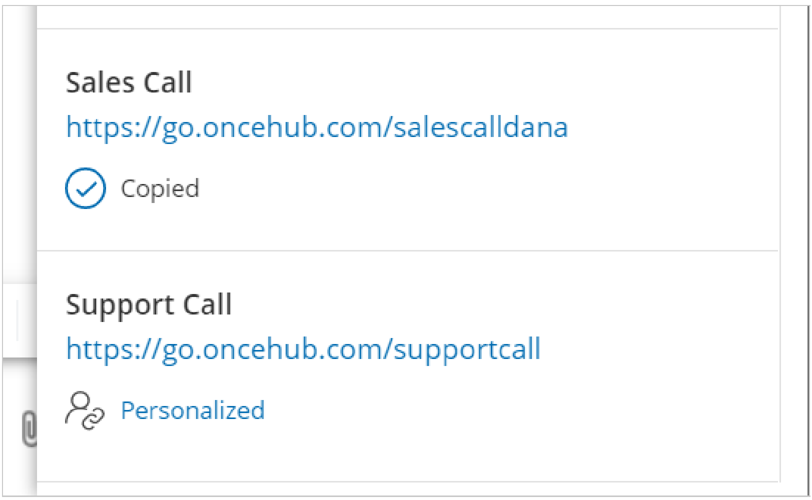


Figure 5: Personalized link copied

8. Paste the Personalized link into your email (Figure 6).

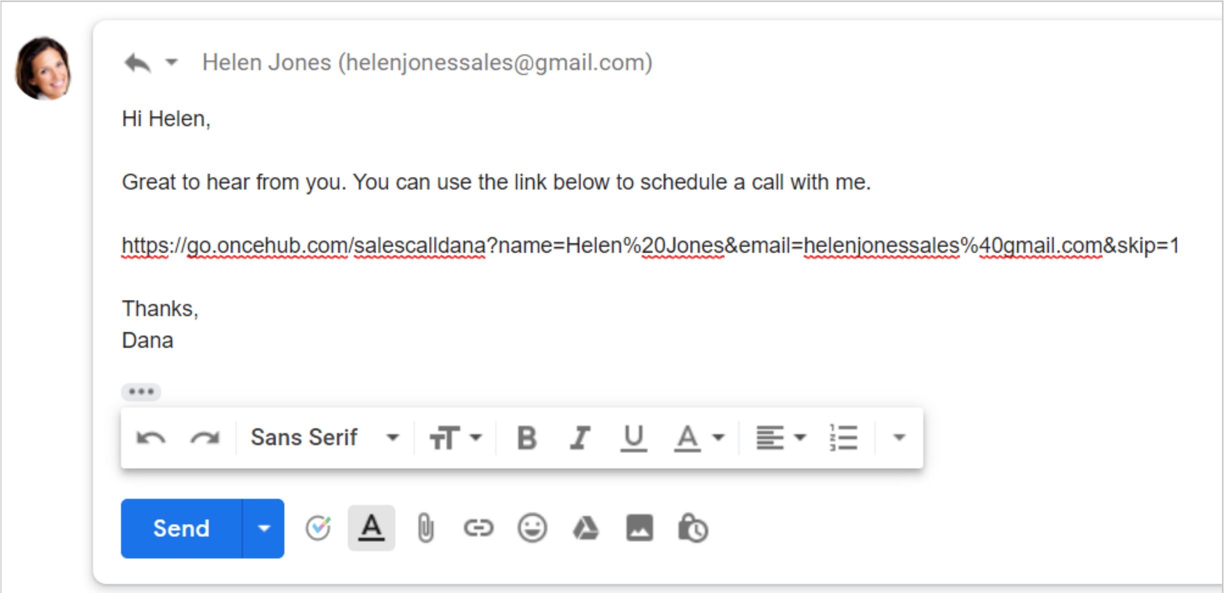


Figure 6: Pasting the Personalized link into your email

9. To turn your booking link into a customized html link, click the Insert Link button on the bottom email menu. (Figure 7).

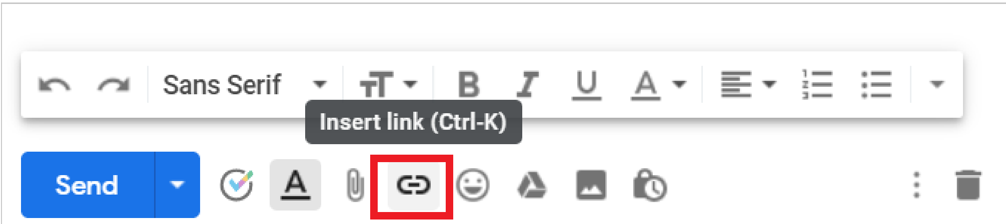


Figure 7: Insert Link button in Gmail.

10. A window will appear (Figure 8). Insert your booking link and the text you would like to display. Click OK.

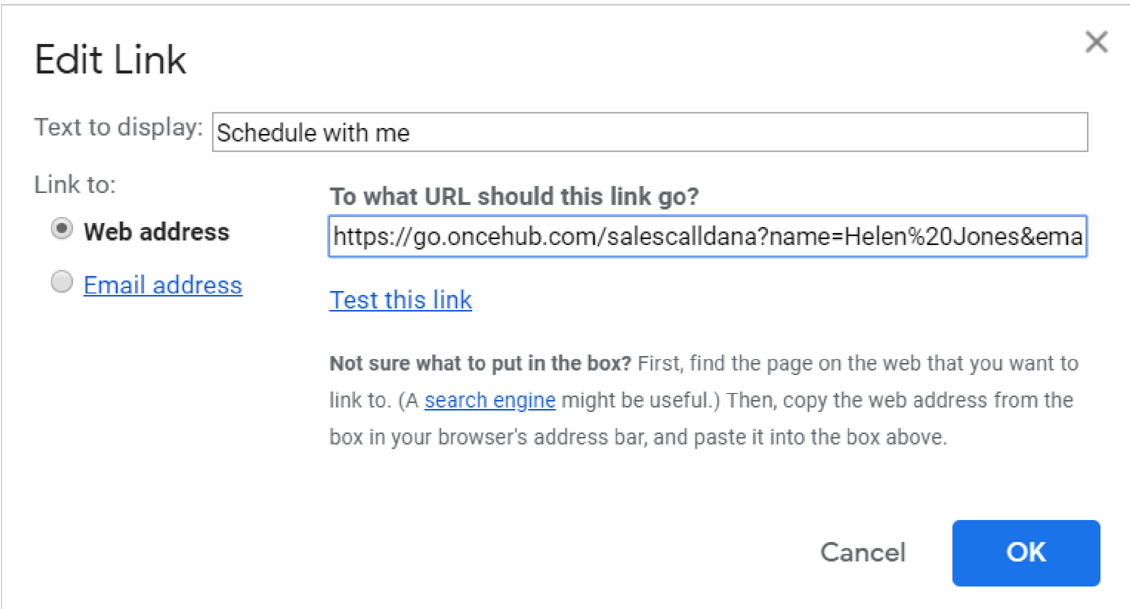


Figure 8: Insert Link window

11. Your booking link now will now appear as an html link. (Figure 9).

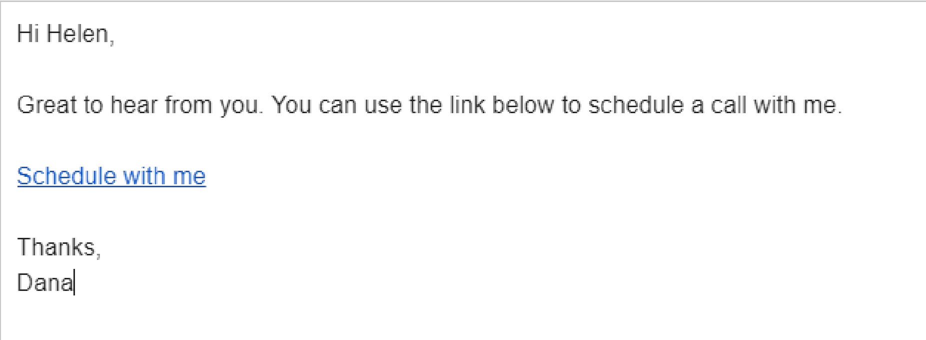


Figure 9: Html link in your email.

When composing a new email

1. Sign in to your Gmail account.
2. Click **Compose** to create a new email.
3. In the **To** field, enter the email address of the person you want to share your Booking page link with.

> **Note :**
>
> If you do not enter an email address, you will need to enter the **Customer name** and **Customer email** in the OnceHub for Gmail extension window when you generate a Personalized link.

4. Click the OnceHub for Gmail icon (Figure 10).

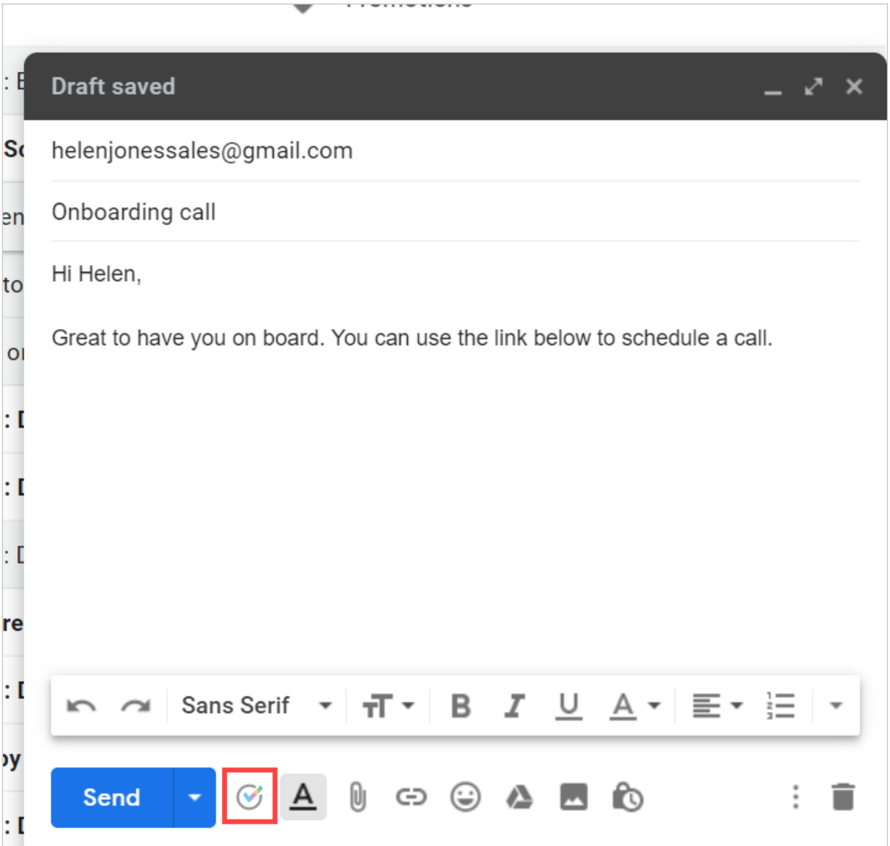


Figure 10: OnceHub for Gmail icon

5. The OnceHub for Gmail extension window will open (Figure 11).

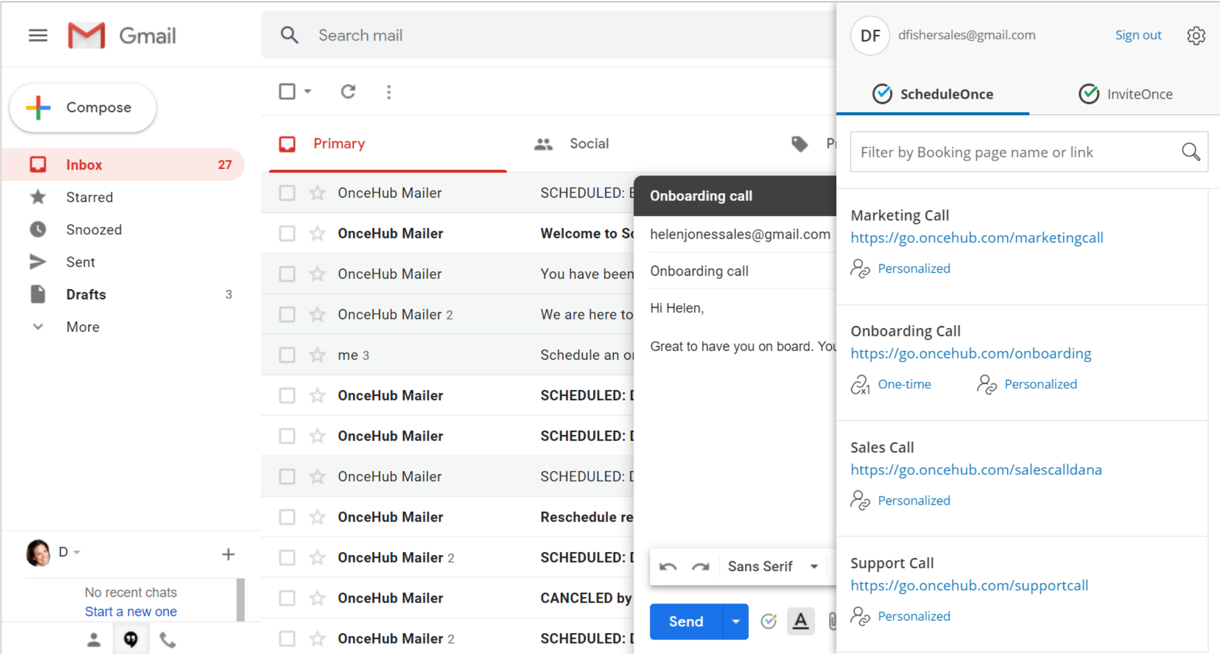


Figure 11: OnceHub for Gmail extension window

6. Click **Personalized** next to the Booking page you want to share (Figure 12).

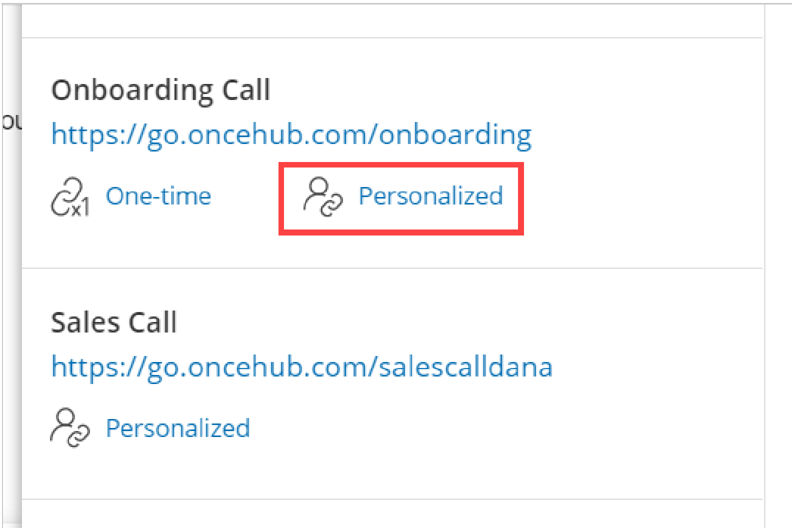


Figure 12: Generating a Personalized link

7. You will see the **Copied** confirmation when the link has been generated and copied to your clipboard (Figure 10).

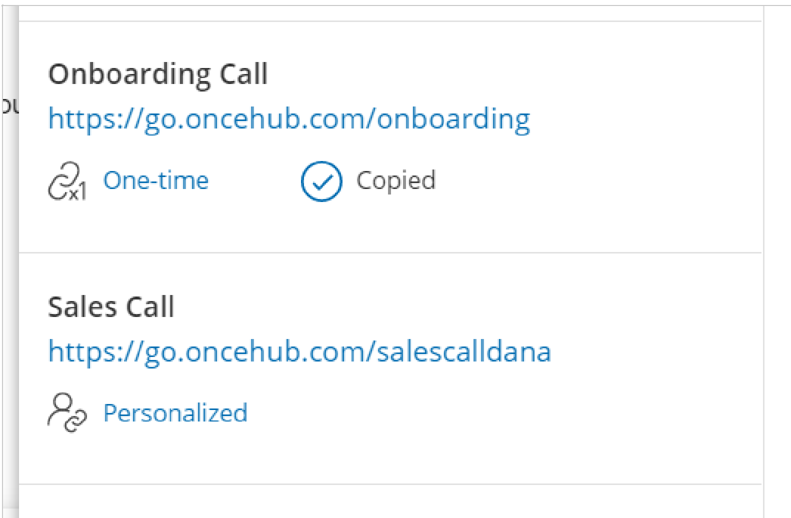


Figure 13: Personalized link copied

8. Paste the Personalized link into your email (Figure 14).

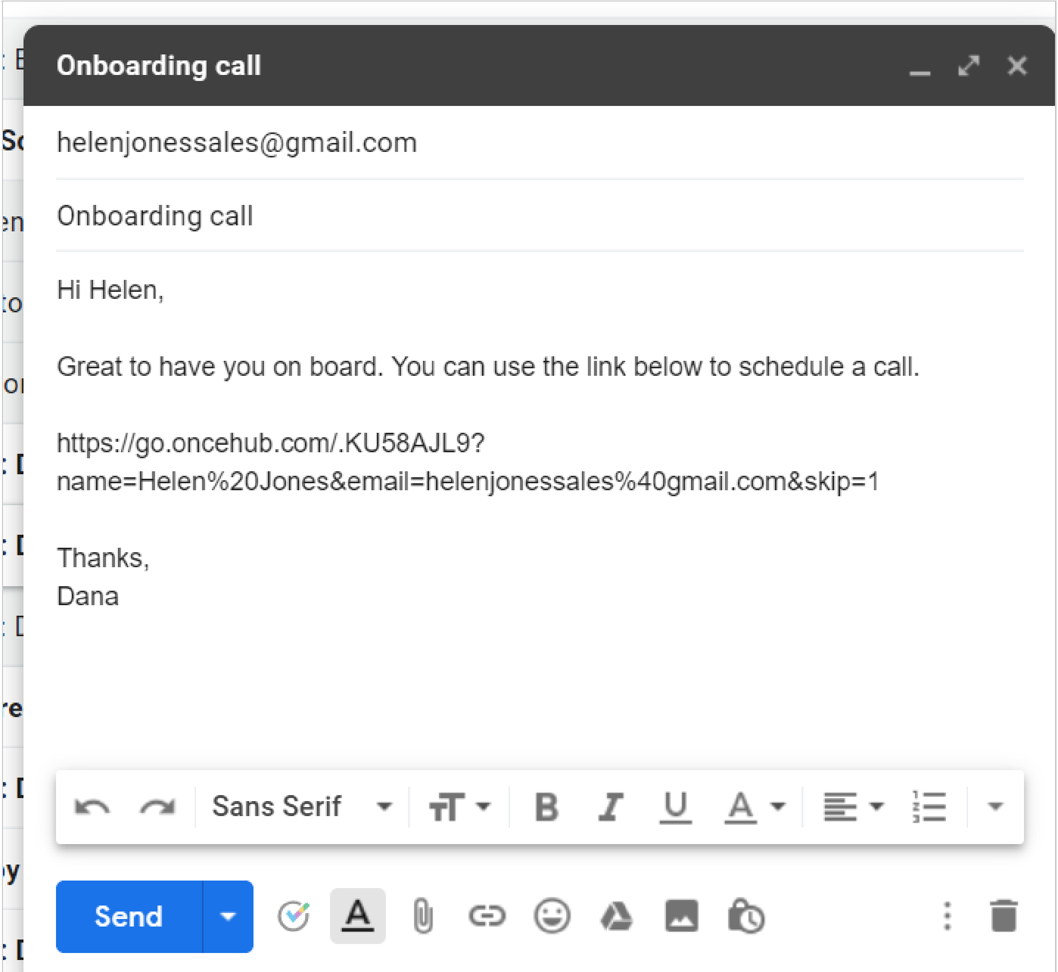


Figure 14: Pasting the Personalized link into your email

9. To turn your booking link into a customized html link, click the Insert Link button on the bottom email menu. (Figure 15).

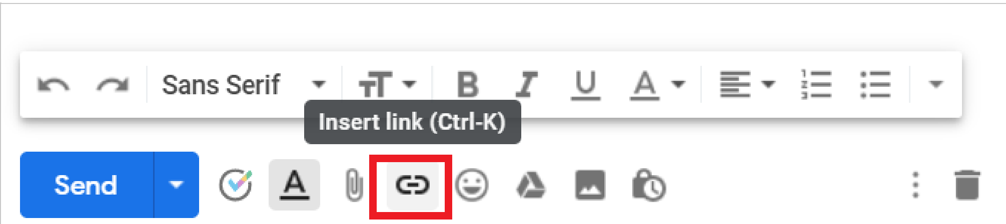


Figure 15: Insert Link button in Gmail.

10. A window will appear (Figure 16). Insert your booking link and the text you would like to display. Click OK.

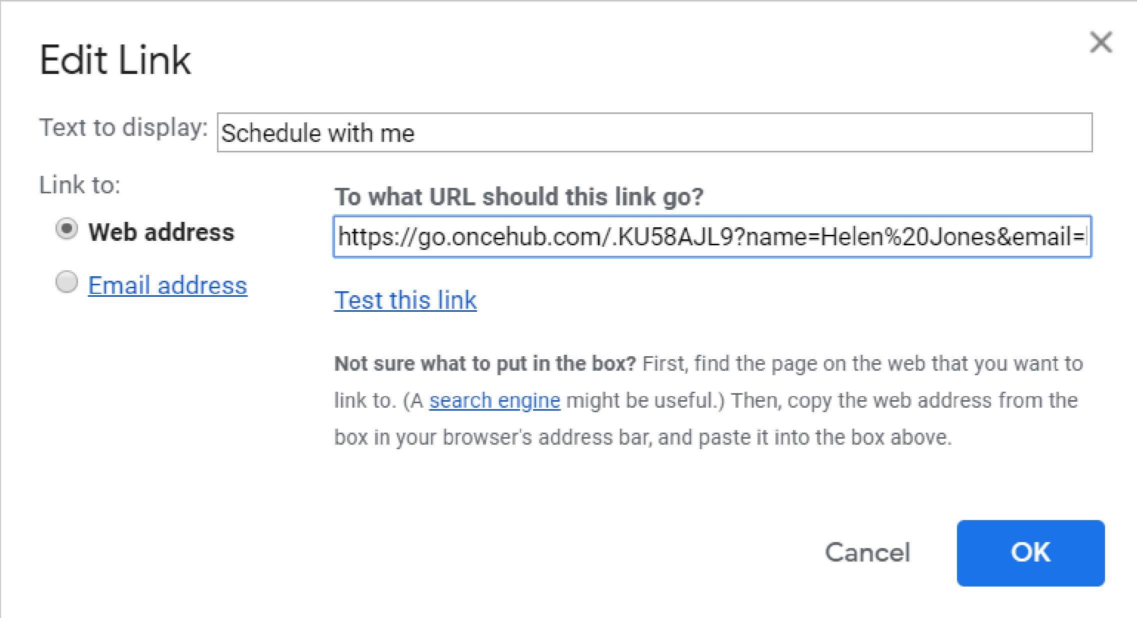


Figure 16: Insert Link window

11. Your booking link now will now appear as an html link. (Figure 17).

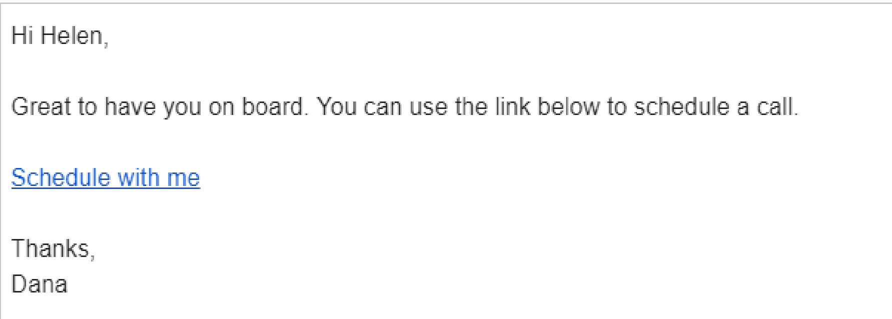


Figure 17: Html link in your email.

Sending one-time links using OnceHub for Gmail

Last Modified on Oct 18, 2022

The OnceHub for Gmail extension enables you to schedule meetings directly from your Gmail account. OnceHub for Gmail gives you instant access to all of your Booking page links without the need to change apps.

In this article, you'll learn about sending one-time links using OnceHub for Gmail.

Understanding one-time links

One-time links are good for one booking only, eliminating any chance of unwanted repeat bookings. A Customer who receives the link will only be able to use it for the intended booking and will not have access to your underlying Booking page. One-time links can be personalized, allowing the Customer to pick a time and schedule without having to fill out the Booking form.

When you create a one-time link using OnceHub for Gmail, the Customer's name and email address is automatically taken from the email. When the Customer uses the Personalized link to schedule a meeting, they only need to choose a date and time, then confirm the meeting. The Booking form is skipped and they will not have to provide their name and email address.

One-time links are only available for Master pages using Rule-based assignment with Dynamic rules.

Note :

You can also send Personalized links using OnceHub for Gmail.

Learn more about sending Personalized links using OnceHub for Gmail

Requirements

To send one-time links using OnceHub for Gmail, you must:

- Install OnceHub for Gmail.
- Have a scheduled meetings User license.
- Create a Master page using Rule-based assignment with Dynamic rules in your OnceHub account.

Sending one-time links using OnceHub for Gmail

When replying to an email

1. Sign in to your Gmail account.
2. Open the email that would like to reply to.
3. Click **Reply**.
4. Click the OnceHub for Gmail icon (Figure 1).

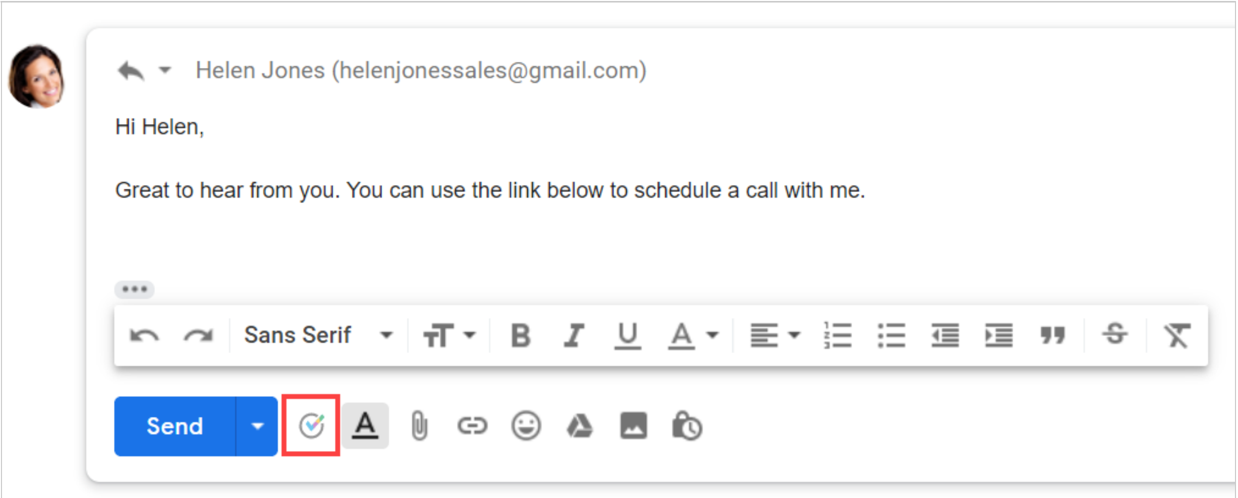


Figure 1: OnceHub for Gmail icon

5. The OnceHub for Gmail extension window will open (Figure 2).

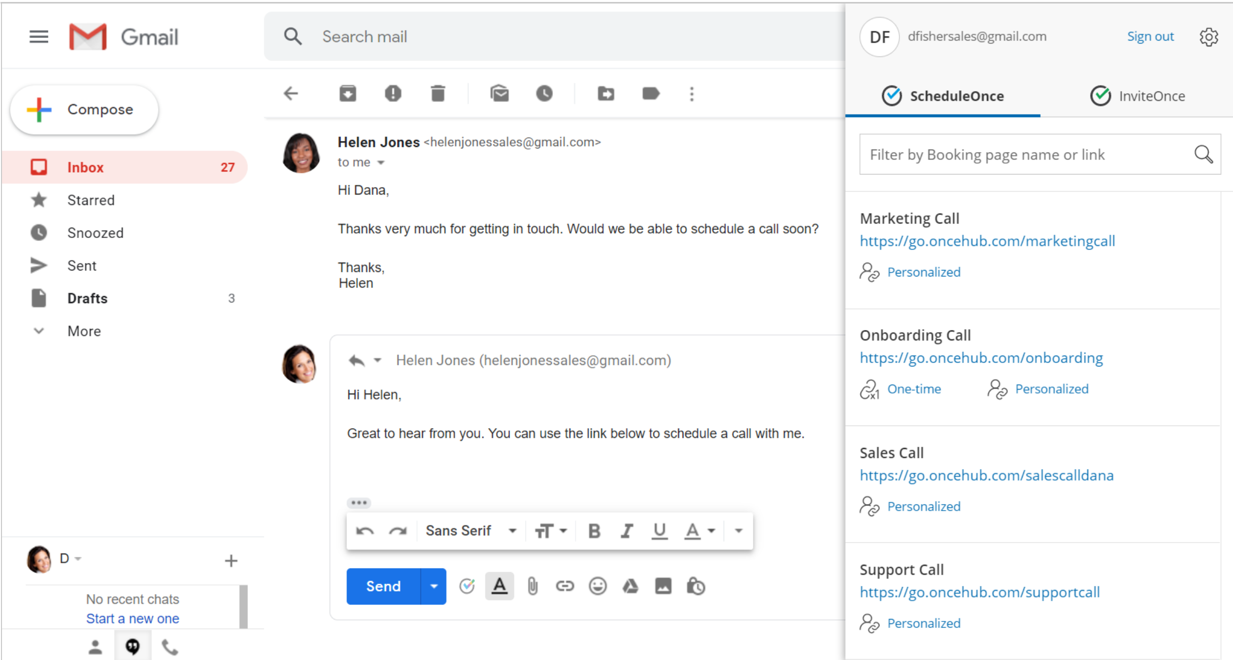


Figure 2: OnceHub for Gmail extension window

6. Click **One-time** next to the Master page you want to share (Figure 3).

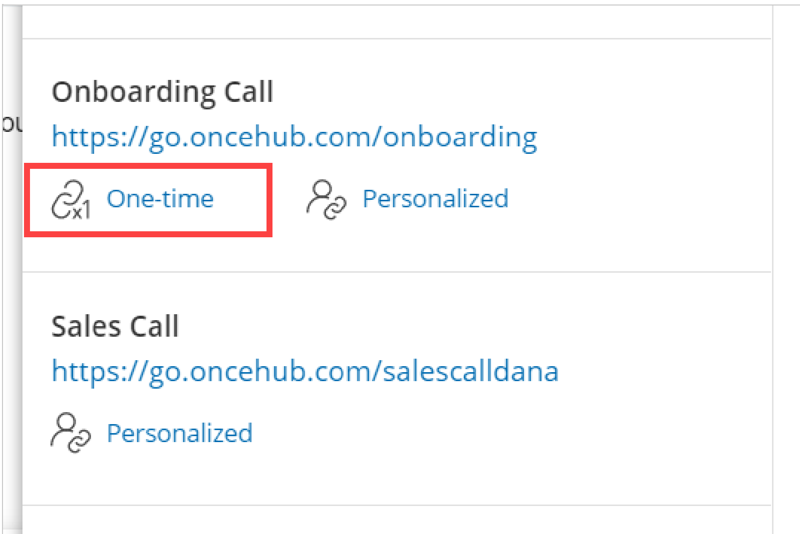


Figure 3: Generating a one-time link

7. You will see the **Copied** confirmation when the link has been generated and copied to your clipboard (Figure 4).

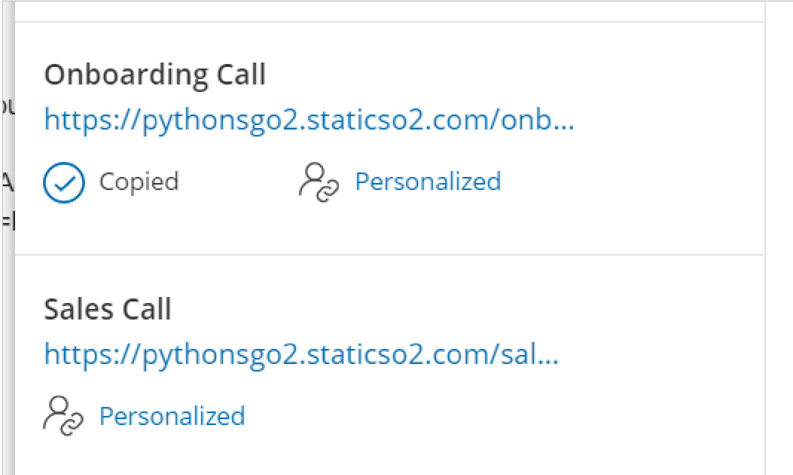


Figure 4: One-time link copied

8. Paste the one-time link into your email (Figure 5).

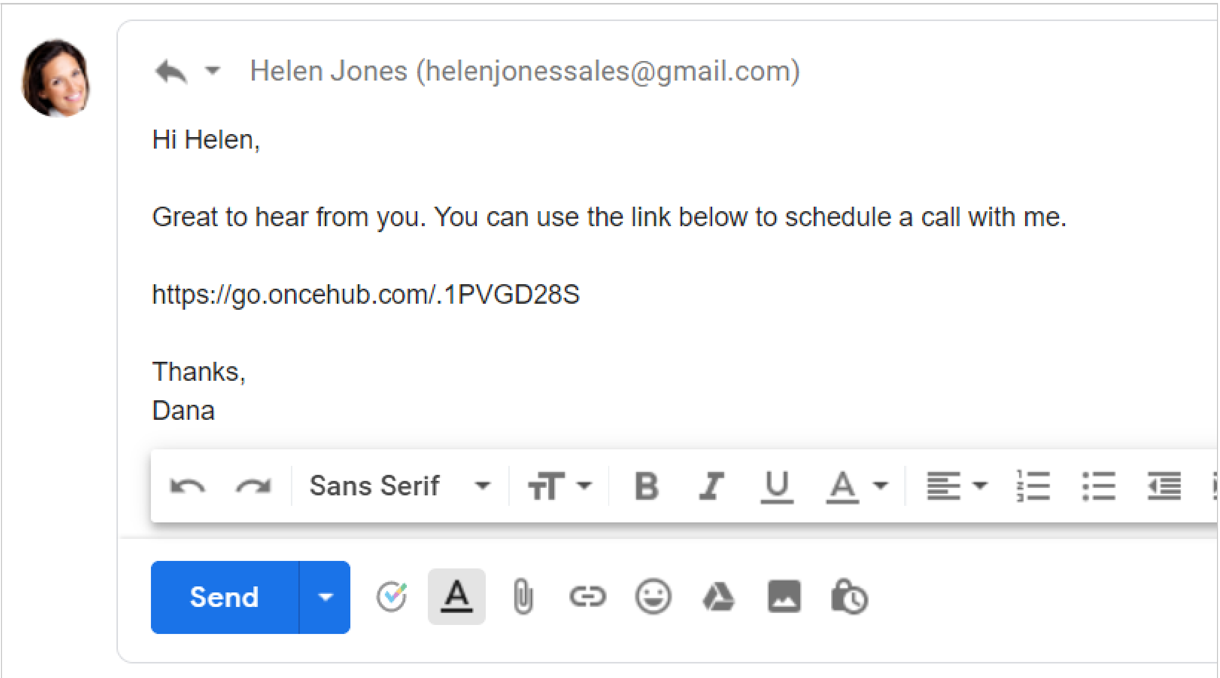


Figure 5: Pasting the one-time link into your email

9. To turn your booking link into a customized html link, click the Insert Link button on the bottom email menu. (Figure 6).

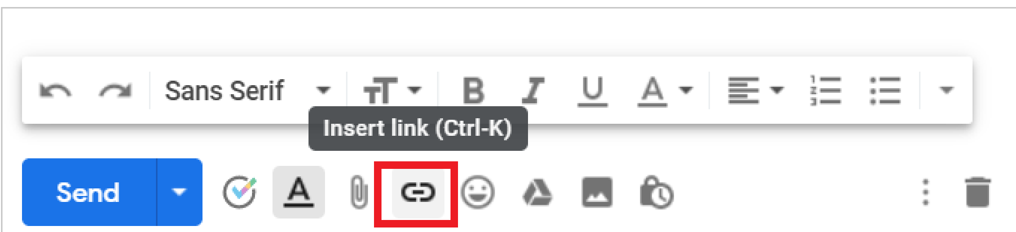


Figure 6: Insert Link button in Gmail.

10. A window will appear (Figure 7). Insert your booking link and the text you would like to display. Click OK.

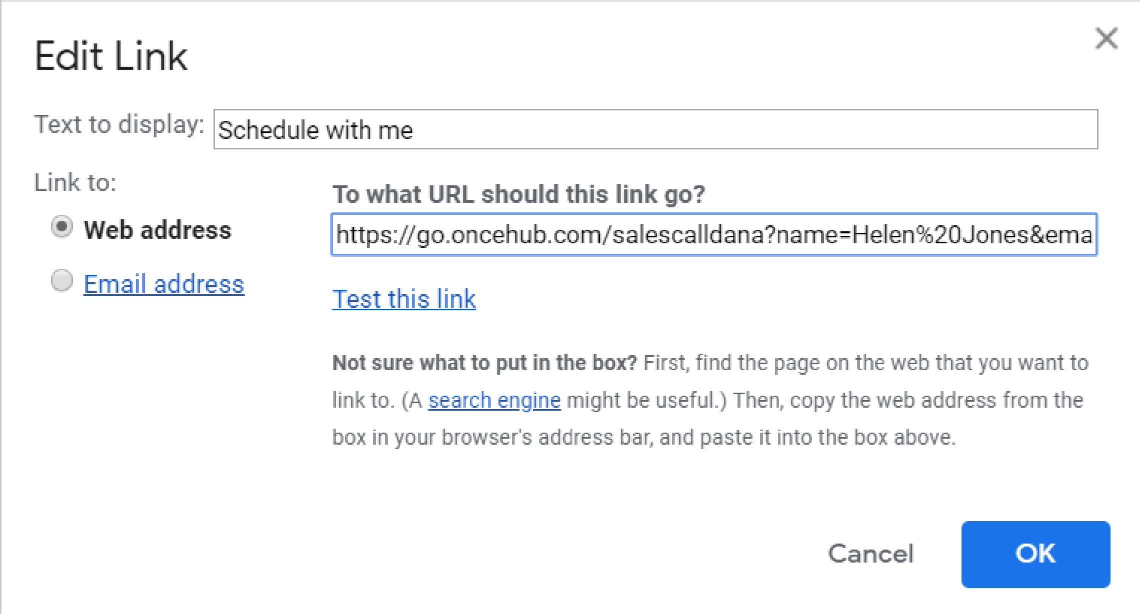


Figure 7: Insert Link window

11. Your booking link now will now appear as an html link. (Figure 8).

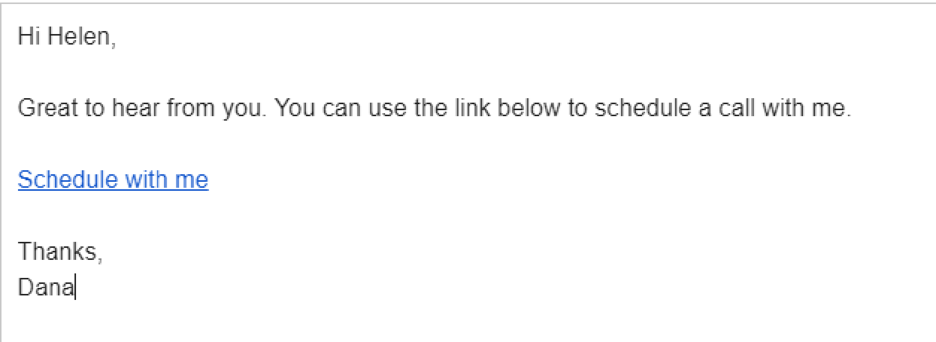


Figure 8: Html link in your email.

When composing a new email

1. Sign in to your Gmail account.
2. Click **Compose** to create a new email.
3. In the **To** field, enter the email address of the person you want to share your Booking page link with.

> **Note :**
>
> If you do not enter an email address, you will need to enter the **Customer name** and **Customer email** in the OnceHub for Gmail extension window when you generate a Personalized link.

4. Click the OnceHub for Gmail icon (Figure 9).

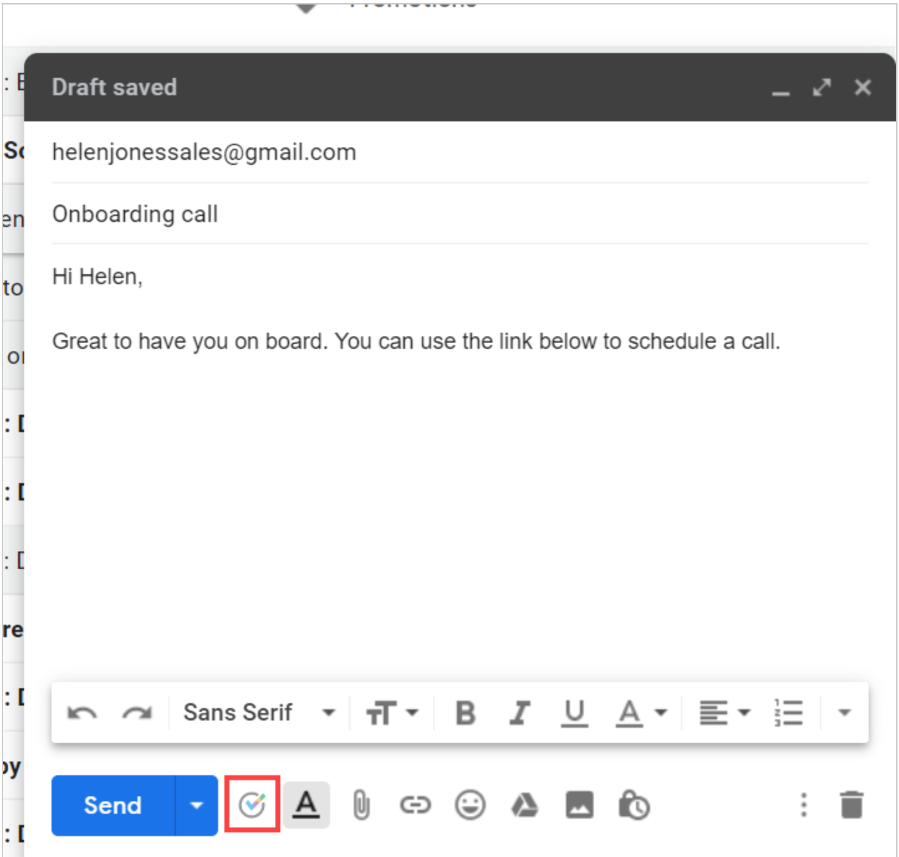


Figure 9: OnceHub for Gmail icon

5. The OnceHub for Gmail extension window will open (Figure 10).

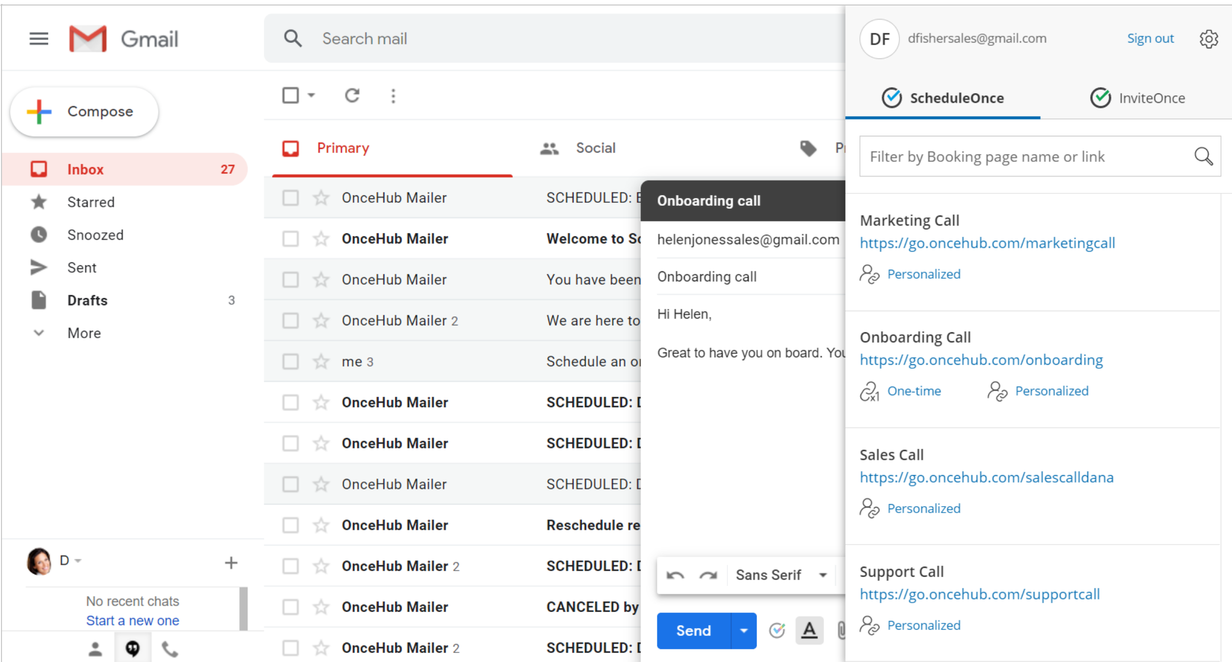


Figure 10: OnceHub for Gmail extension window

6. Click **Personalized** next to the Booking page you want to share (Figure 11).

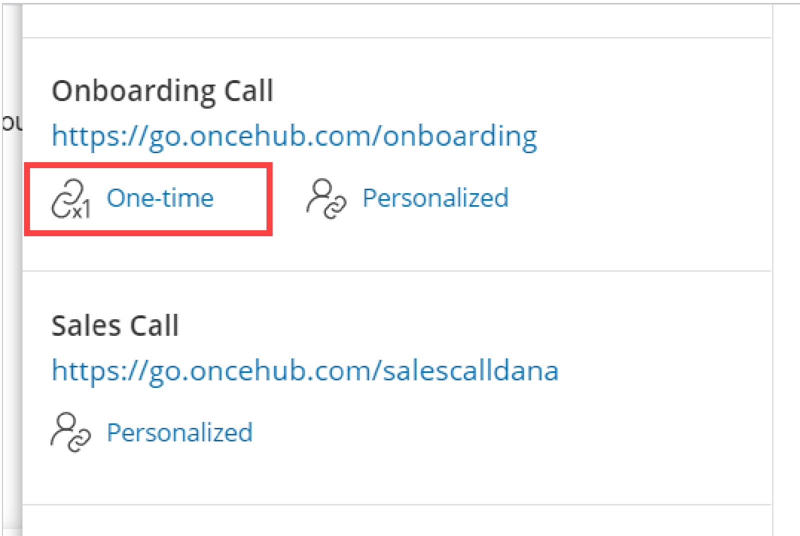


Figure 11: Generating a one-time link

7. You will see the **Copied** confirmation when the link has been generated and copied to your clipboard (Figure 12).

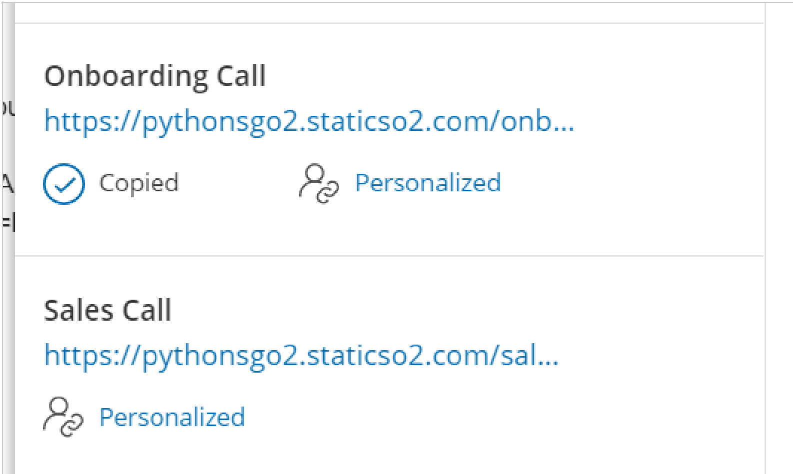


Figure 12: One-time link copied

8. Paste the one-time link into your email (Figure 13).

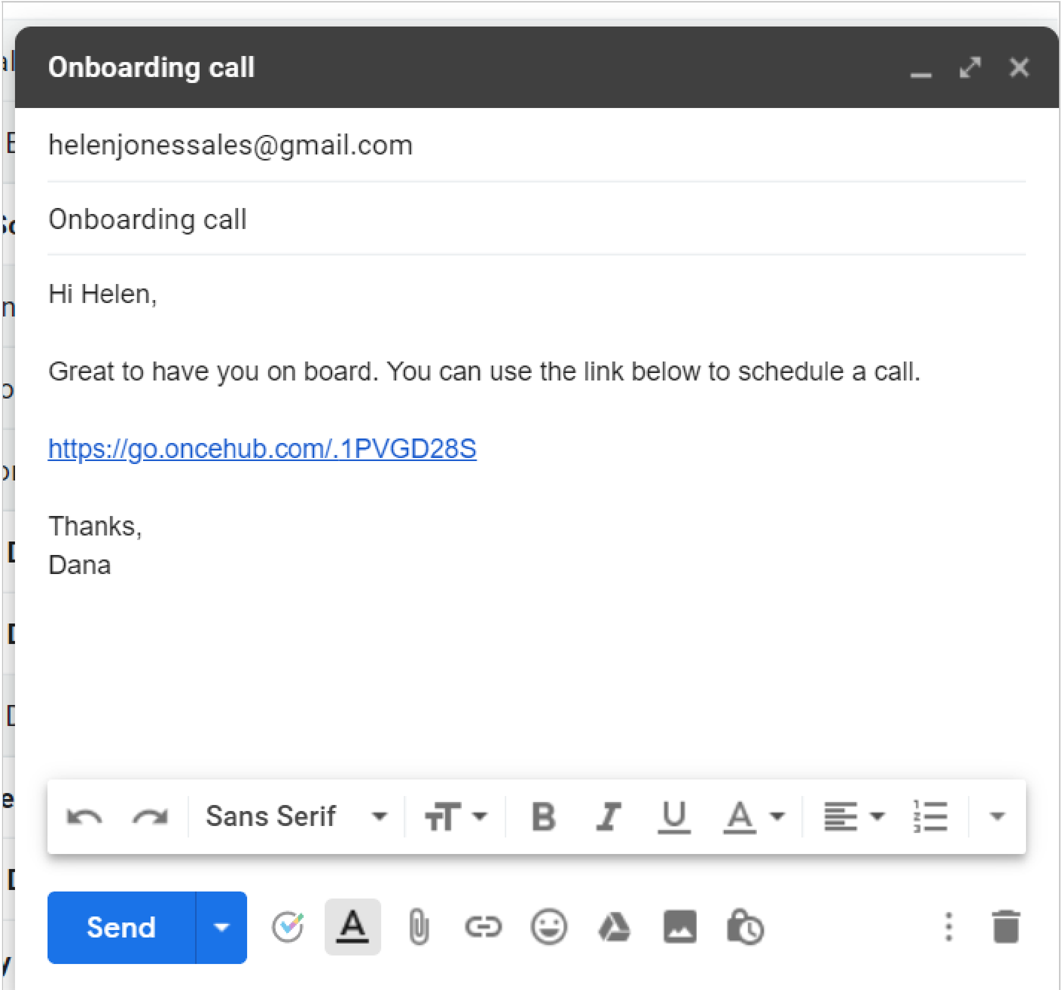


Figure 13: Pasting the one-time link into your email

9. To turn your booking link into a customized html link, click the Insert Link button on the bottom email menu. (Figure 14.)

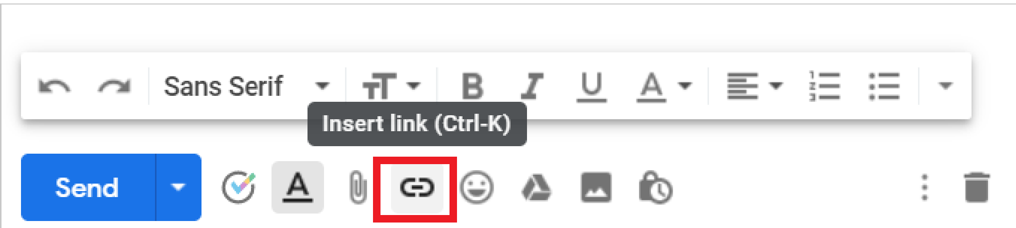


Figure 14: Insert Link button in Gmail.

10. A window will appear (Figure 15). Insert your booking link and the text you would like to display. Click OK.

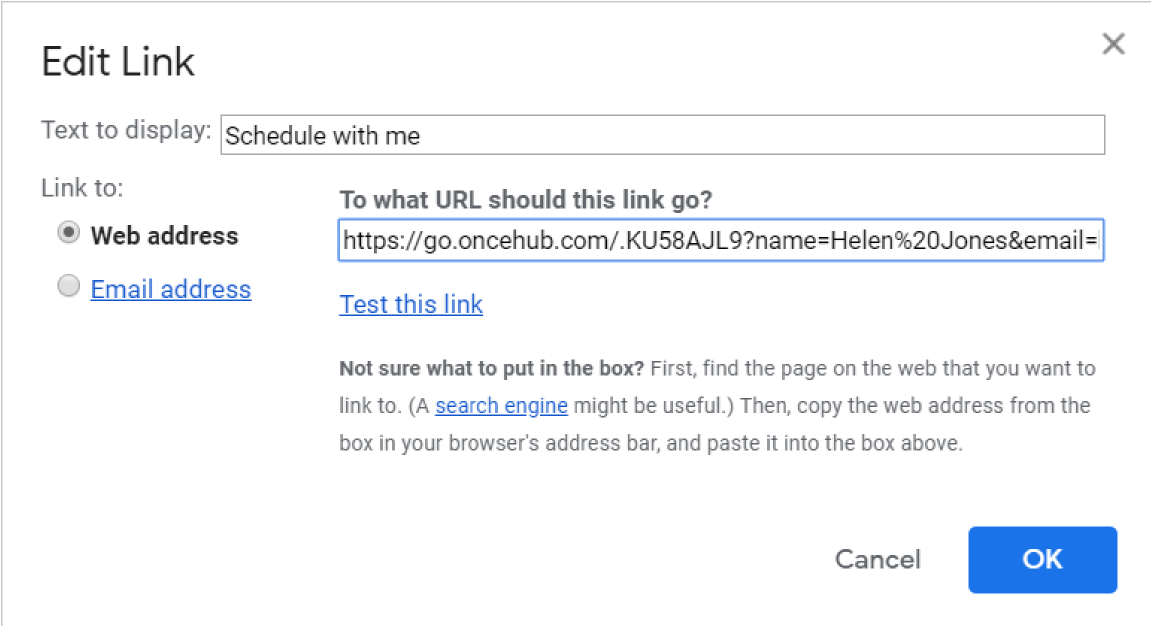


Figure 15: Insert Link window

11. Your booking link now will now appear as an html link. (Figure 16).

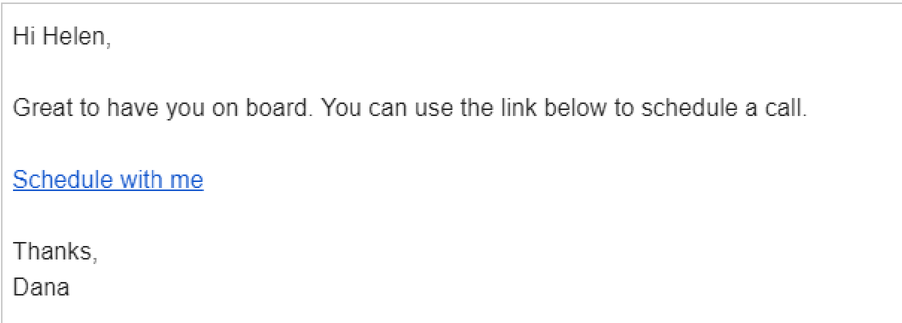


Figure 16: Html link in your email.

OnceHub for Gmail FAQs

Last Modified on Oct 18, 2022

In this article, you'll find answers to some of the most common questions related to OnceHub for Gmail.

How do I install the OnceHub for Gmail extension?

1. Go to the Chrome Web Store listing for OnceHub for Gmail.
2. Click **Add to Chrome** (Figure 1).

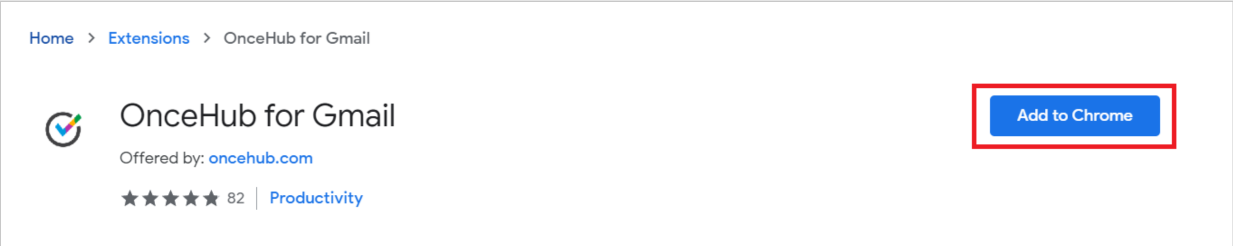


Figure 1: Add to Chrome

3. The installation permissions pop-up will appear.
4. Click **Add Extension** (Figure 2).

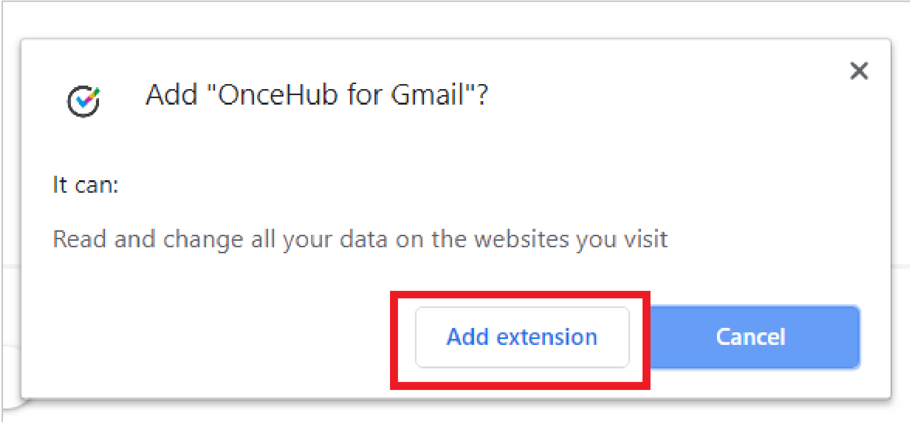


Figure 2: Add to Chrome confirmation

5. Once installed, you will see the OnceHub for Gmail confirmation screen.

Learn more about installing OnceHub for Gmail

How do I open the OnceHub for Gmail extension?

Once you've installed OnceHub for Gmail, you can open the extension in the email you're composing by clicking the OnceHub for Gmail icon (Figure 3).

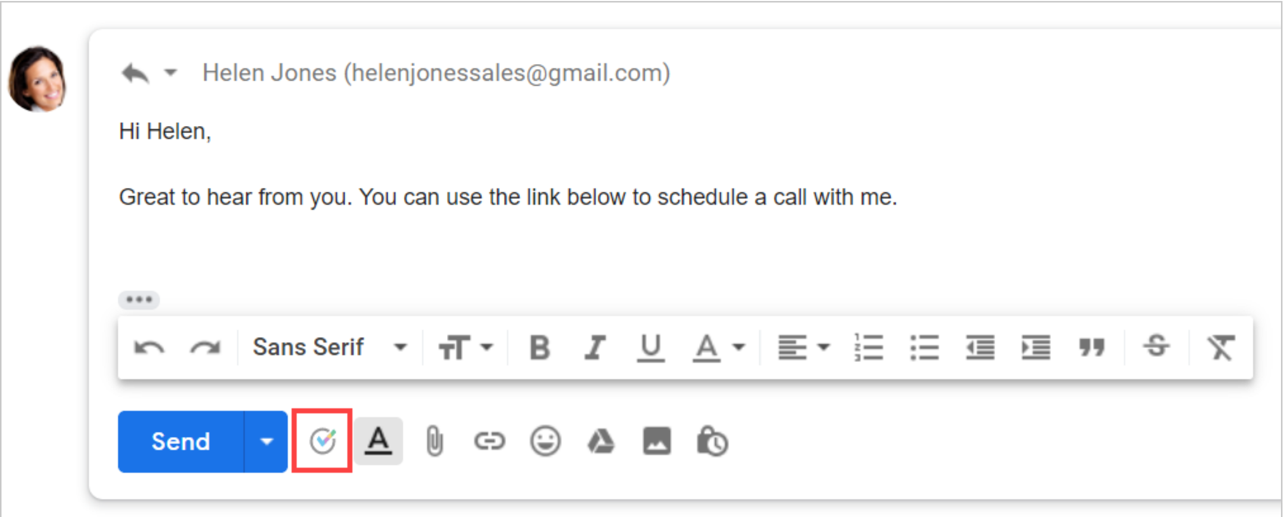


Figure 3: OnceHub for Gmail icon

Can I search for my Booking pages in OnceHub for Gmail?

Yes, you can filter the list of Booking pages by Booking page name or link by using the search box (Figure 4).

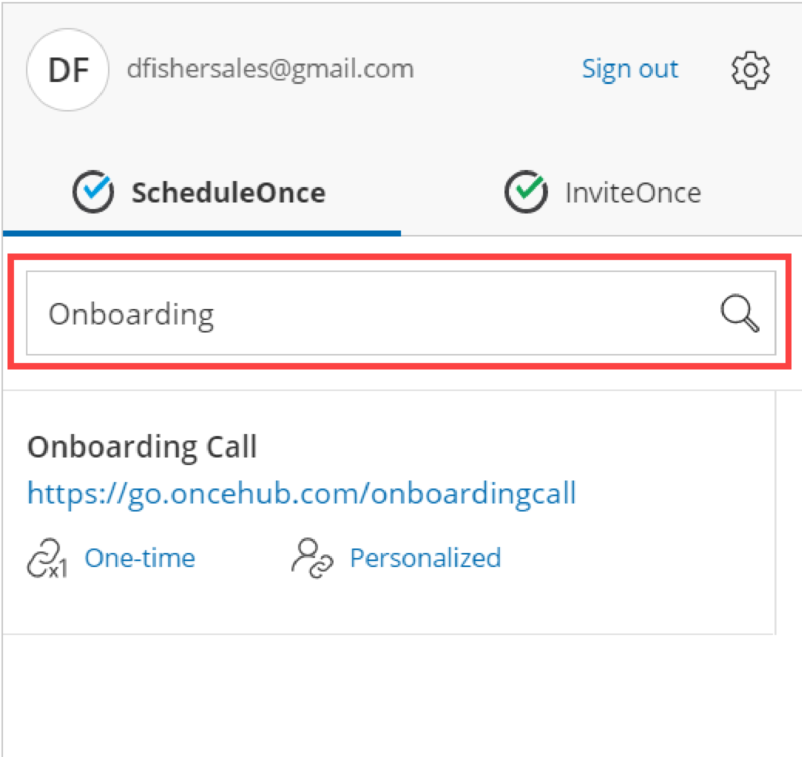


Figure 4: Filter by Booking page name or link

Why can't I see my Booking pages in OnceHub for Gmail?

If you can't see any Booking pages in the OnceHub for Gmail extension, you may need to sign in to your OnceHub account.

If you not created any Booking pages in your account, you will need to create a Booking page before you can use it in OnceHub for Gmail.

Why can't I use my Booking page?

If you can't use a Booking page in OnceHub for Gmail, there may be a calendar connection error in your account. Sign in to your OnceHub Account. Then, select your profile picture or initials in the top right-hand corner → **Profile settings** → **Calendar connection** and click the **Reconnect your calendar** button.

Learn more about calendar connection

What happens if someone is CC'd on the email I want to create a Personalized booking link for?

In this case, the Personalized link will be automatically generated for the email address in the "To" field. You will not be asked to confirm the details before it's copied to your clipboard.

Why do I see a "Scheduled meeting license is required" error message?

You will see a "Scheduled meetings license is required" error message if your account has not been assigned a license. Ask your OnceHub Administrator to assign a product license to your account.

How do I uninstall OnceHub for Gmail?

1. In your Chrome browser, click the three dots (action menu) in the top right corner (Figure 5).

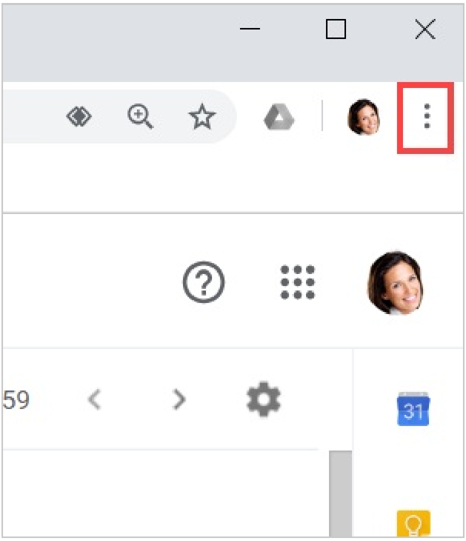


Figure 5: Chrome browser three dots (action menu)

2. In the drop-down menu, select **More tools -> Extensions**.
3. In the **OnceHub for Gmail** box, click **Remove** (Figure 6).

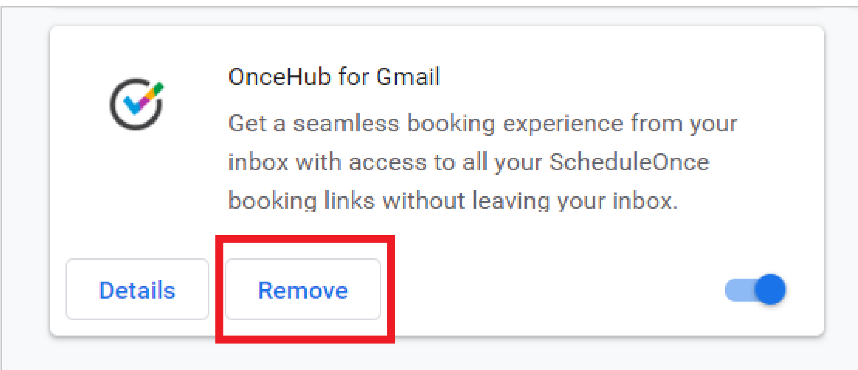


Figure 6: OnceHub for Gmail options in extensions menu.

4. Once you click **Remove**, you will see a confirmation screen (Figure 7). Click **Remove.**

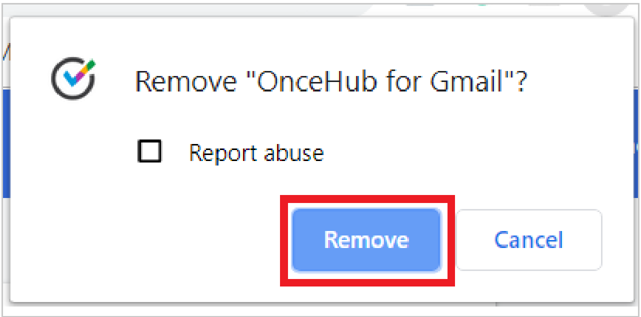


Figure 7: Removal confirmation.

Uninstalling OnceHub for Gmail

Last Modified on Jan 13, 2020

The OnceHub for Gmail extension enables you to schedule meetings directly from your Gmail account. OnceHub for Gmail gives you instant access to all of your Booking page links without the need to change apps.

In this article, you'll learn how to uninstall OnceHub for Gmail.

Uninstalling OnceHub for Gmail

From your Chrome browser settings

1. In your Chrome browser, click the three dots (action menu) in the top right corner (Figure 1).

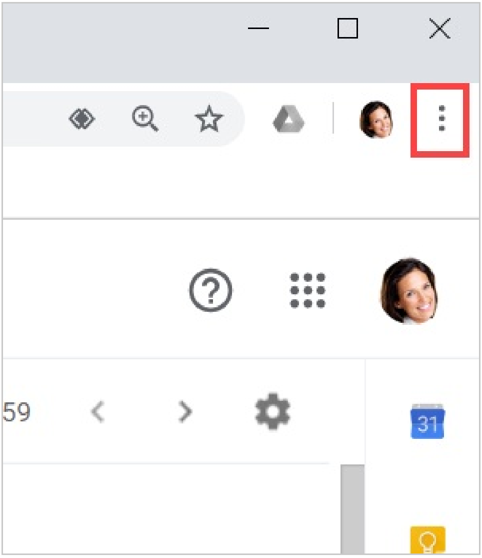


Figure 1: Chrome browser three dots (action menu)

2. In the drop-down menu, select **More tools -> Extensions**.
3. In the **OnceHub for Gmail** box, click **Remove** (Figure 2).

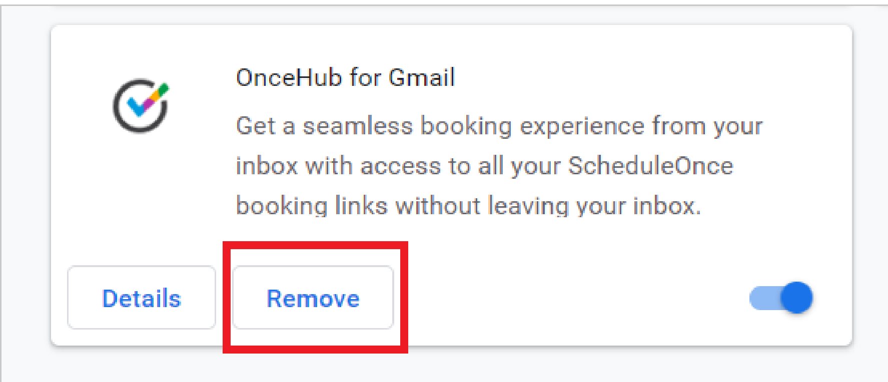


Figure 2: OnceHub for Gmail options in extensions menu.

4. Once you click **Remove**, you will see a confirmation screen (Figure 3). Click **Remove.**

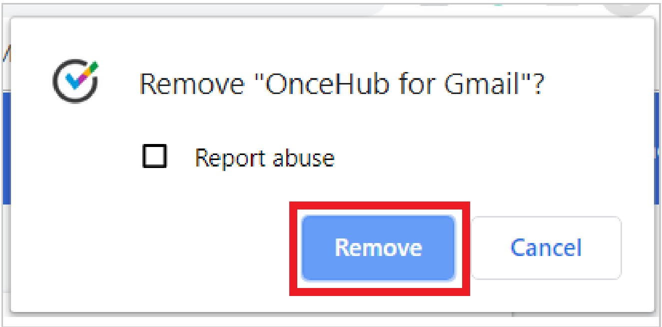


Figure 3: Removal confirmation.

From Chrome Web Store

1. Go to the Chrome Web Store listing for OnceHub for Gmail.
2. Click **Remove from Chrome** (Figure 4).

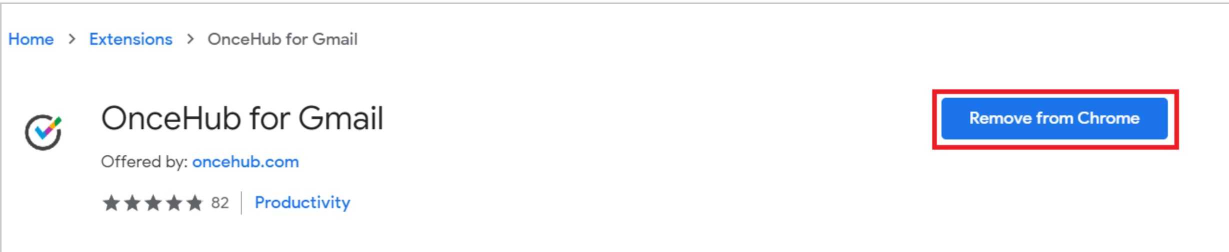


Figure 4: Removing OnceHub for Chrome in Chrome Web Store.

Custom dial-in numbers

Last Modified on Oct 18, 2022

With our Zoom integration, you can provide dial-in numbers for multiple different countries.

When you set up your Zoom account, you can choose one or more countries that you commonly invite attendees from. The dial-in numbers for the countries that you choose appear by default in OnceHub User notifications, Customer notifications, and the calendar invitation.

Specifying the default dial-in countries on notifications

In your Zoom account, go to one of the following locations depending on your requirement:

Role	Requirement	Location
Administrator	Specify a default set of countries for all meetings in your organization.	Click **Account Settings** and select the **Telephone** tab.
Administrator	Specify a default set of countries for a specific group.	Click **Group Management** and click the name of the group. Then, click **Group Settings** and select the **Telephone** tab.
Meeting Organizer	Specify a default set of countries for the meetings that you host.	Click **My Meeting Settings** and select the **Telephone** tab.

Next, follow the steps below:

1. In the **Global Dial-in Countries/Regions** section of the page, click the Edit icon. The **Select Global Dial-in Countries/Regions** pop-up will appear (Figure 1).

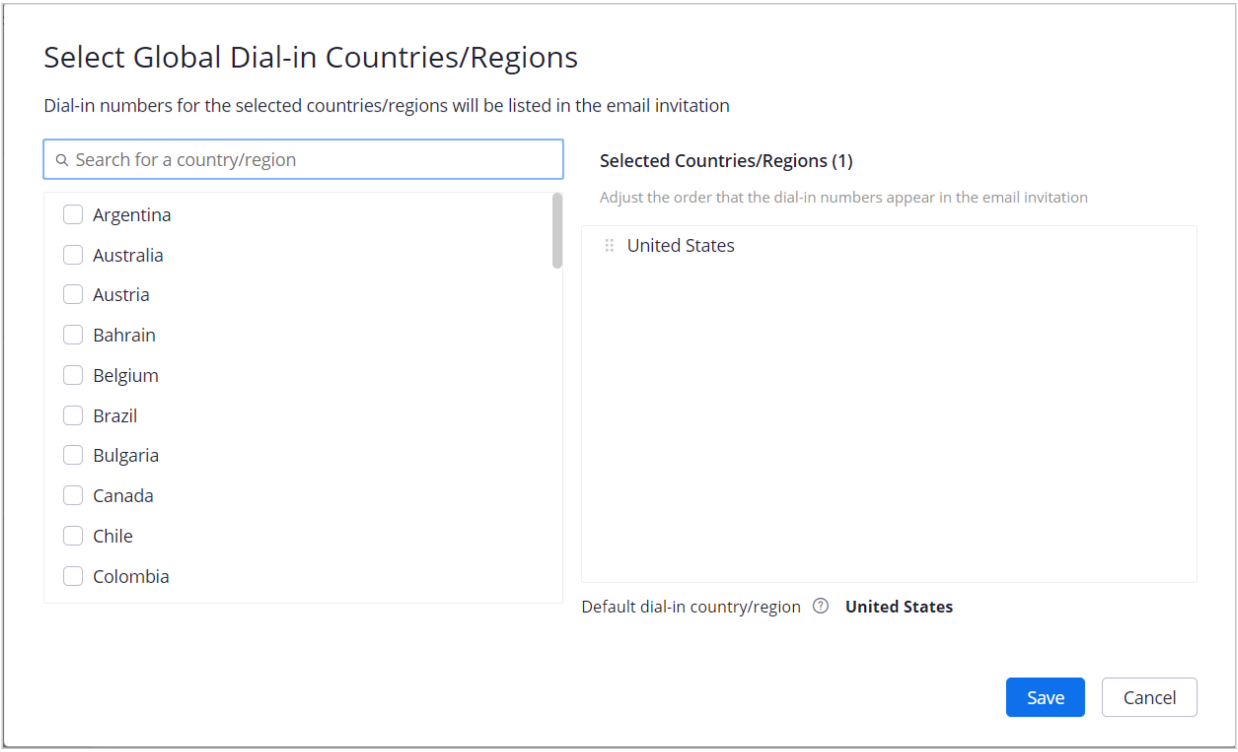


Figure 1: Select Global Dial-in Countries/Regions pop-up

2. Choose the countries that you expect to have meeting or webinar participants dial in from.
   For example, if your meetings will have participants from the United States, Canada, and Australia, click the check boxes next to those country names.
   If you don't see the name of a country, type the first few letters of the country name in the **Search for a country/region** box.

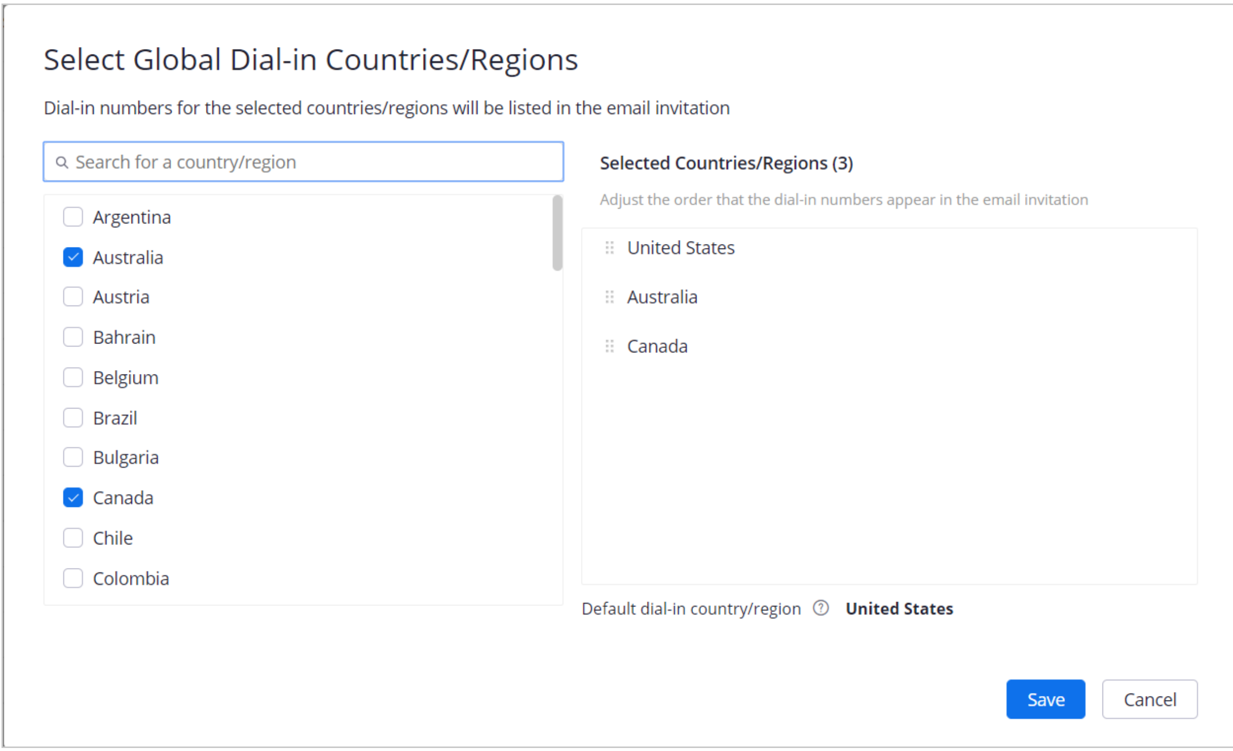


Figure 2: Select countries for participant dial-in

3. Click **Save**.

The selected dial-in numbers will appear in OnceHub User notifications, Customer notifications, and the calendar invitation of any meetings scheduled via the connected Booking page.

Learn more about specifying default dial-in countries in your Zoom account

Zoom security best practices

Last Modified on Oct 18, 2022

At OnceHub, we designed our native Zoom integration with security at the forefront of our minds. Many of our integration features help you secure your meetings from uninvited guests.

Unique meeting IDs and links for every session

If you're used to offering a static link, break that habit fast and connect our native Zoom integration instead. It may be simpler to use the same customized meeting link to everyone meeting with you, but that opens a huge vulnerability for uninvited guests. Each session needs its own meeting created, with its own meeting ID.

There's no need to waste time signing into Zoom, creating the meeting, and sending a separate email with the conferencing information. When a customer books with you, OnceHub automatically creates a meeting in Zoom and includes all conferencing information in the booking confirmation notification and on the calendar event.

Note: Once you have a unique meeting ID, be sure only to share the conferencing information with those you want to join. Many make the mistake of including a joining link on publicly available posters or websites. This increases the risk of an insecure meeting.

Dynamic passcodes for every session

Some hackers can use technology to guess unique meeting IDs or may take advantage of publicly-posted information. Make sure anyone joining your session also receives a meeting passcode and don't advertise it anywhere except among authorized attendees. This gives an additional measure of security, creating another barrier for uninvited guests.

With OnceHub's native integration, you can ensure each Zoom session requires a dynamic passcode, different for each booking. Our Zoom integration creates the dynamic passcode automatically and adds it to your meetings and all conferencing information provided in notifications.

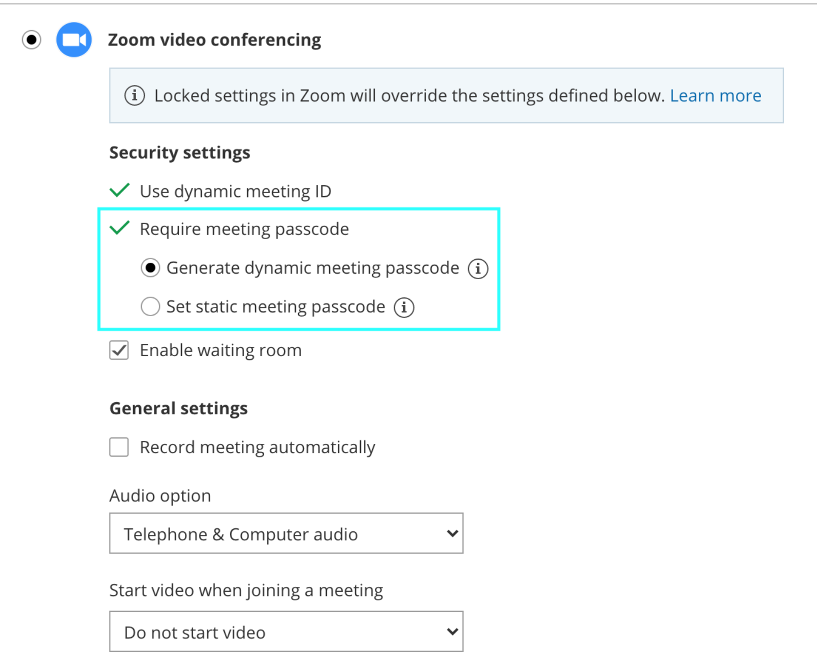


Figure 1: Generate dynamic meeting passcode

Using the waiting room

If you're concerned for uninvited guests, be sure to select the waiting room feature. This allows you to authorize individuals before they're able to access your meeting. Uninvited guests may have guessed your link or passcode, but they still won't be able to join your session without your express permission.

If you have many people joining, we recommend defining an additional co-host to watch the waiting room notifications and grant people access.

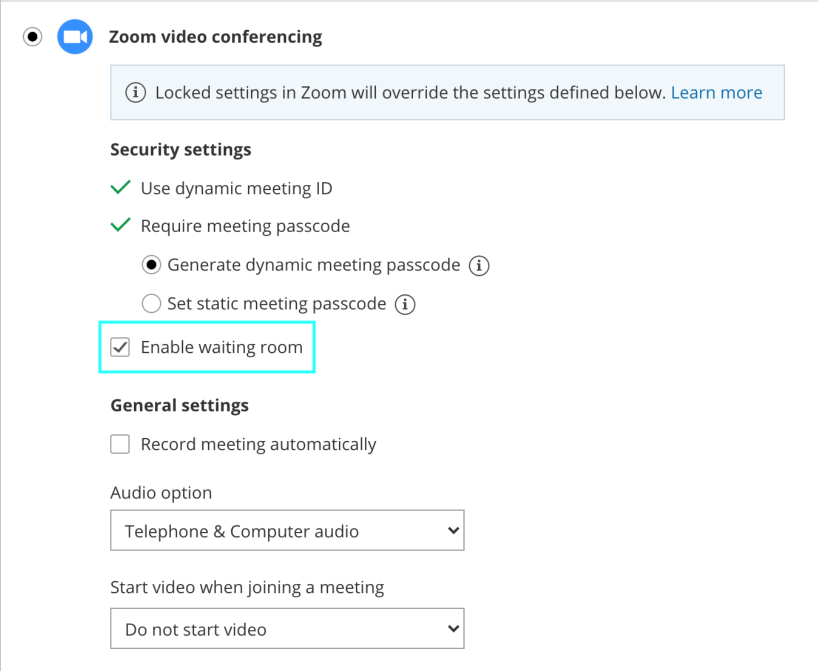


Figure 2: Enable waiting room

Learn more about Zoom's waiting room feature

Starting video for host and/or participants when they join

Depending on your organization, you may prefer everyone use video upon joining, so you can understand who is in your meeting and confirm no one is providing a name that isn't theirs to use.

In this case, you can opt to start video for all participants, or all participants and the host, upon joining the Zoom session.

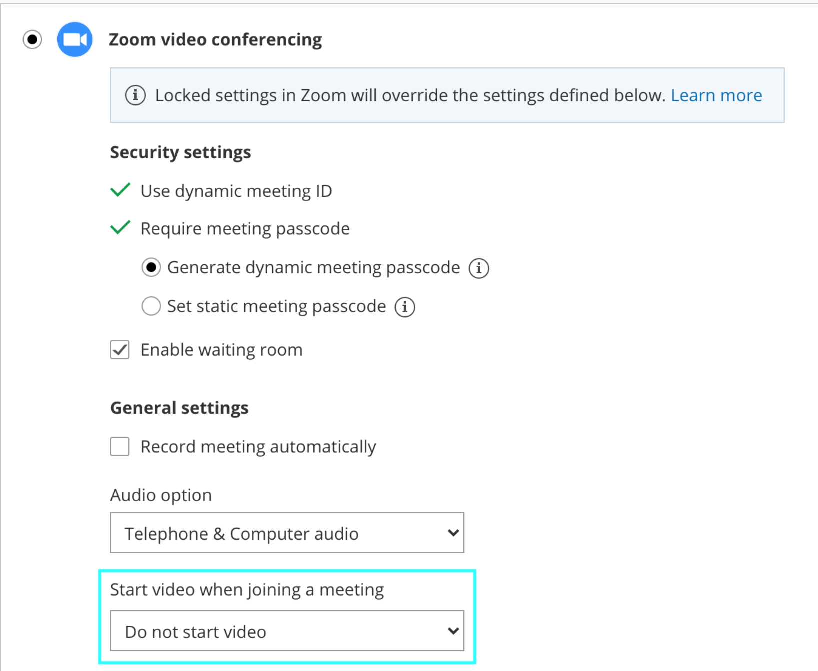


Figure 3: Start video when joining a meeting

Educate your team members before they go live

Be sure not to skip a dry run for each team member giving meetings. That dry run is one of the most important steps helping them maintain professionalism in their video meetings. Especially if they've not used the video conferencing app much, there's a learning curve they'll need to adjust to in order to feel comfortable leading their session.

They should have a high awareness of all their available features. Notable settings that help them control the experience include:

- Waiting room features
- Chat features, including disabling private chat
- Muting participants
- Disabling video
- Turning off annotation
- Managing screen sharing of fellow attendees
- Removing participants

If they'll be occupied with meeting content and a number of people will be present, it may be worth having another person from your organization join. The team member leading the meeting can designate this additional team member as a co-host. The co-host can control the above listed features while the original host leads the meeting.

Team members should also ensure they've downloaded the correct software version before their session and join a few minutes early, just in case they encounter technical difficulties. These can be challenging to predict, so their best bet is always to join four or five minutes early, so they can address any unexpected issues.

With a strong handle on the features available to them, they'll be able to lead the session with authority and be prepared to shut down any unanticipated security issues that come their way. For most sessions, they won't need to use this knowledge, but everyone (except the uninvited guests) will be grateful they're ready if a security breach occurs.

Zoom passcodes: Dynamic or static

Last Modified on Oct 18, 2022

It's important always to use a passcode for your video meetings, in order to prevent unwanted guests from joining. Our Zoom integration provides two options for this: a dynamic passcode or a static passcode.

Dynamic passcodes

If you're using dynamic passcodes, OnceHub assigns every Zoom meeting scheduled with a unique passcode, just for that meeting. Dynamic passcodes are highly preferred over static passcodes because they are much more secure. Anyone who’s booked with you in the past or merely seen your conferencing information could have the static passcode. They may try to use it again and unexpectedly joining another session.

Once you switch to dynamic passcodes, OnceHub generates a unique passcode with maximum complexity for every single Zoom meeting, never used before and never repeated again. This is one of the most significant steps you can take to reduce Zoom security risk.

Static passcodes

Although dynamic passcodes are more secure and highly recommended, some may wish to use a static passcode instead. A static passcode uses the same passcode for all Zoom meetings scheduled.

The meeting ID will still be unique for each meeting but the passcode providing an extra step of security will remain the same from meeting to meeting.

Google Meet security best practices

Last Modified on Oct 18, 2022

At OnceHub, we designed our native Google Meet integration with security at the forefront of our minds. Our integration features help you secure your meetings from uninvited guests.

Unique meeting IDs and links for every session

Each session needs its own meeting created, with its own meeting ID. There's no need to waste time signing into Google, creating the meeting on your Google Calendar, and sending a separate email with the conferencing information.

When you connect our native Google Meet integration, OnceHub automatically creates a meeting in Google Meet and includes all conferencing information in the booking confirmation notification and on the calendar event.

Note: Once you have a unique meeting ID, be sure only to share the conferencing information with those you want to join. Many make the mistake of including a joining link on publicly available posters or websites. This increases the risk of an insecure meeting.

Educate your team members before they go live

Be sure not to skip a dry run for each team member giving meetings. That dry run is one of the most important steps helping them maintain professionalism in their video meetings. Especially if they've not used the video conferencing app much, there's a learning curve they'll need to adjust to in order to feel comfortable leading their session.

They should have a high awareness of all their available features. Notable settings that help them control the experience include:

- Chat features, including disabling private chat
- Muting participants
- Disabling video
- Managing screen sharing of fellow attendees
- Removing participants

If they'll be occupied with meeting content and a number of people will be present, it may be worth having another person from your organization join. The team member leading the meeting can designate this additional team member as a co-host. The co-host can control the above listed features while the original host leads the meeting.

Team members should also join a few minutes early, just in case they encounter technical difficulties. These can be challenging to predict, so their best bet is always to join four or five minutes early, so they can address any unexpected issues within their own or other attendees' environments.

With a strong handle on the features available to them, they'll be able to lead the session with authority and be prepared to shut down any unanticipated security issues that come their way. For most sessions, they won't need to use this knowledge, but everyone (except the uninvited guests) will be grateful they're ready if a security breach occurs.

Microsoft Teams security best practices

Last Modified on Oct 18, 2022

At OnceHub, we designed our native Microsoft Teams integration with security at the forefront of our minds. Many of our integration features help you secure your meetings from uninvited guests.

Unique meeting IDs and links for every session

If you're used to offering a static link, break that habit fast and connect our native Microsoft Teams integration instead. It may be simpler to use the same customized meeting link to everyone meeting with you, but that opens a huge vulnerability for uninvited guests. Each session needs its own meeting created, with its own meeting ID.

There's no need to waste time signing into Microsoft Teams, creating the meeting, and sending a separate email with the conferencing information. When a customer books with you, OnceHub automatically creates a meeting in Microsoft Teams and includes all conferencing information in the booking confirmation notification and on the calendar event.

Note: Once you have a unique meeting ID, be sure only to share the conferencing information with those you want to join. Many make the mistake of including a joining link on publicly available posters or websites. This increases the risk of an insecure meeting.

Using the lobby

If you're concerned for uninvited guests, be sure to use the lobby feature in Microsoft Teams. This allows you to authorize individuals before they're able to access your meeting. Uninvited guests may have guessed your link or password, but they still won't be able to join your session without your express permission.

If you have many people joining, we recommend defining an additional co-host to watch the waiting room notifications and grant people access.

Learn more about changing Teams participant settings, including the lobby feature

Educate your team members before they go live

Be sure not to skip a dry run for each team member giving meetings. That dry run is one of the most important steps helping them maintain professionalism in their video meetings. Especially if they've not used the video conferencing app much, there's a learning curve they'll need to adjust to in order to feel comfortable leading their session.

They should have a high awareness of all their available features. Notable settings that help them control the experience include:

- Lobby features
- Chat features, including disabling private chat
- Muting participants
- Disabling video
- Managing the Whiteboard
- Managing screen sharing of fellow attendees
- Removing participants

If they’ll be occupied with meeting content and a number of people will be present, it may be worth having another person from your organization join. The team member leading the meeting can designate this additional team member as a co-host. The co-host can control the above listed features while the original host leads the meeting.

Team members should also ensure they’ve downloaded the correct software version before their session and join a few minutes early, just in case they encounter technical difficulties. These can be challenging to predict, so their best bet is always to join four or five minutes early, so they can address any unexpected issues.

With a strong handle on the features available to them, they’ll be able to lead the session with authority and be prepared to shut down any unanticipated security issues that come their way. For most sessions, they won’t need to use this knowledge, but everyone (except the uninvited guests) will be grateful they’re ready if a security breach occurs.

GoToMeeting security best practices

Last Modified on Oct 18, 2022

At OnceHub, we designed our native GoToMeeting integration with security at the forefront of our minds. Our integration features help you secure your meetings from uninvited guests. We also have a number of recommendations to follow while conducting your meetings that can help you up your security game, keeping your meetings safe and private.

Unique meeting IDs and links for every session

If you're used to offering a static link, like https://www.gotomeet.me/MyNameHere, break that habit fast and connect our native GoToMeeting integration instead. It may be simpler to use the same customized meeting link to everyone meeting with you, but that opens a huge vulnerability for uninvited guests. Each session needs its own meeting created, with its own meeting ID.

There's no need to waste time signing into GoToMeeting, creating the meeting, and sending a separate email with the conferencing information. When a customer books with you, OnceHub automatically creates a meeting in GoToMeeting and includes all conferencing information in the booking confirmation notification and on the calendar event.

Note: Once you have a unique meeting ID, be sure only to share the conferencing information with those you want to join. Many make the mistake of including a joining link on publicly available posters or websites. This increases the risk of an insecure meeting.

A password for every session

Some hackers can use technology to guess unique meeting IDs or may take advantage of publicly-posted information. Make sure anyone joining your session also receives a meeting password and don't advertise it anywhere except among authorized attendees. This gives an additional measure of security, creating another barrier for uninvited guests.

Using the Meeting Lock feature

If you're concerned for uninvited guests, be sure to use the Meeting Lock feature in the GoToMeeting app. This allows you to keep individuals in a waiting room before they're able to access your meeting. Uninvited guests may have guessed your link or password, but they still won't be able to join your session without your express permission.

Learn more about GoToMeeting's Meeting Lock feature

Educate your team members before they go live

Be sure not to skip a dry run for each team member giving meetings. That dry run is one of the most important steps helping them maintain professionalism in their video meetings. Especially if they've not used the video conferencing app much, there's a learning curve they'll need to adjust to in order to feel comfortable leading their session.

They should have a high awareness of all their available features. Notable settings that help them control the experience include:

- Chat features, including disabling private chat
- Muting participants
- Disabling video
- Meeting lock
- Managing screen sharing of fellow attendees
- Removing participants

If they'll be occupied with meeting content and a number of people will be present, it may be worth having another person from your organization join. The team member leading the meeting can designate this additional team member as a co-host. The co-host can control the above listed features while the original host leads the meeting.

Team members should also ensure they've downloaded the correct software version before their session and join a few minutes early, just in case they or any participants encounter technical difficulties. These can be challenging to predict, so their best bet is always to join four or five minutes early, so they can address any unexpected issues.

With a strong handle on the features available to them, they'll be able to lead the session with authority and be prepared to shut down any unanticipated security issues that come their way. For most sessions, they won't need to use this knowledge, but everyone (except the uninvited guests) will be grateful they're ready if a security breach occurs.

Webex Meetings security best practices

Last Modified on Apr 9, 2024

At OnceHub, we designed our native Webex Meetings integration with security at the forefront of our minds.

Important:

Webex has announced an end-of-life for its current meetings-related API. From March 31st, 2024, it will be permanently replaced by their newer REST API. To ensure Webex meeting links continue to be generated automatically, you must log into OnceHub and reauthenticate your Webex connection before March 31st.

Some existing features are not supported by the new API, so configuring your booking page will be a little different:

- The new API supports only dynamic passwords
- Audio settings will be taken from your Webex account, and can no longer be set in OnceHub
- Meetings shorter than 10 minutes will not be supported.
  - In booking pages: Customers will see an error message, and won't be able to schedule a meeting when trying to book a Webex-hosted meeting shorter than 10 minutes.
  - In booking calendars: The booking will be scheduled, but there will be no Webex link attached.

To reauthenticate your Webex connection, follow these steps:

1. Go to your profile settings by clicking the initials/profile picture at the top right of your screen
2. Click **Video conferencing**
3. Beneath the Webex heading, click **Reauthenticate** and follow the prompts to complete the process

You are welcome to reach out to support@oncehub.com if you have any questions.

Unique meeting IDs and links for every session

If you're used to offering a static link to your Webex Meetings Personal Room, like https://meetingsamer20.webex.com/meet/pr1234567890, break that habit fast and connect our native Webex Meetings integration instead. It may be simpler to use the same customized meeting link to everyone meeting with you, but that opens a huge vulnerability for uninvited guests. Each session needs its own meeting created, with its own meeting ID.

There's no need to waste time signing into Webex Meetings, creating the meeting, and sending a separate email with the conferencing information. When a customer books with you, OnceHub automatically creates a meeting in Webex Meetings and includes all conferencing information in the booking confirmation notification and on the calendar event.

Note:

Once you have a unique meeting ID, be sure only to share the conferencing information with those you want to join. Many make the mistake of including a joining link on publicly available posters or websites. This increases the risk of an insecure meeting.

A password for every session

Some hackers can use technology to guess unique meeting IDs or may take advantage of publicly-posted information. Make sure anyone joining your session also receives a meeting password and don't advertise it anywhere except among authorized attendees. This gives an additional measure of security, creating another barrier for uninvited guests.

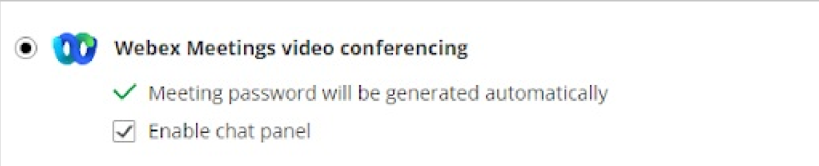


Figure 1: Meeting passwords

Educate your team members before they go live

Be sure not to skip a dry run for each team member giving meetings. That dry run is one of the most important steps helping them maintain professionalism in their video meetings. Especially if they've not used the video conferencing app much, there's a learning curve they'll need to adjust to in order to feel comfortable leading their session.

They should have a high awareness of all their available features. Notable settings that help them control the experience include:

- Waiting room features
- Chat features, including disabling private chat
- Muting participants
- Disabling video
- Turning off annotation
- Managing screen sharing of fellow attendees
- Removing participants

If they'll be occupied with meeting content and a number of people will be present, it may be worth having another person from your organization join. The team member leading the meeting can designate this additional team member as a co-host. The co-host can control the above listed features while the original host leads the meeting.

Team members should also ensure they've downloaded the correct software version before their session and join a few minutes early, just in case they encounter technical difficulties. These can be challenging to predict, so their best bet is always to join four or five minutes early, so they can address any unexpected issues.

With a strong handle on the features available to them, they'll be able to lead the session with authority and be prepared to shut down any unanticipated security issues that come their way. For most sessions, they won't need to use this knowledge, but everyone (except the uninvited guests) will be grateful they're ready if a security breach occurs.

Integrating Webex Meetings with OnceHub

Last Modified on Apr 15, 2024

Booking pages seamlessly integrate your booking activities with Webex Meetings through all phases of the booking lifecycle. When a booking is made, video conferencing session details are integrated with all booking notifications and a video conferencing session will be created automatically.

Connecting to Webex Meetings

To connect Webex Meetings with OnceHub:

1. Select your profile picture or initials in the top right-hand corner → **Profile settings** → **Video conferencing →Webex Meetings**.
2. Click the **Connect** button. This will open a pop-up window.
3. Follow the instructions to connect your account to OnceHub.

Congratulations! OnceHub is now connected to Webex Meetings.

You can then configure your booking pages to use Webex Meetings as your video conferencing option.

Configure booking pages to use video conferencing

Our integration automatically creates events in Webex Meetings. Customers receive a single OnceHub confirmation, including all meeting details in their local time zone. You can configure your Booking pages to use the video call app by editing the **Conferencing / Location** section of the Booking page.

1. Hover over the left hand menu and go to the Booking pages icon → Booking pages → relevant Booking page → **Conferencing / Location**.
2. In the **Meeting channel** step, select **Virtual meeting: Video conferencing or phone call**.
3. For **Who provides conferencing information?** step, select **Conferencing information is provided by the Host (you)**.
4. To **Edit conferencing information** step, select **Webex Meetings video conferencing**.
5. Click **Save**.

Salesforce integration security

Last Modified on Jun 2, 2023

The OnceHub integration with Salesforce communicates with your Salesforce organization in real time using the Salesforce API. All API calls between OnceHub and Salesforce are made via a special API User that is granted the OnceHub permission set. This ensures that new records can always be created, and at the same time, the permissions of individual Salesforce users are not altered.

Below is how OnceHub communicates with Salesforce:

- **Access your basic information (id, profile, email, address, phone):** Allows access to the Identity URL service.
- **Perform requests on your behalf at any time (refresh_token, offline_access):** Allows a refresh token to be returned if you are eligible to receive one. This lets the app interact with the User's data while the User is offline. The refresh_token scope is synonymous with offline_access.

Using Salesforce Record IDs to identify Customers during the booking process

Last Modified on Sep 17, 2019

When scheduling with existing Salesforce records, you can use the Salesforce Lead ID, Contact ID, Person Account ID, or Case Record ID to identify Customers during the booking process.

Recognizing the Customer by their Record ID provides two key benefits:

- On the User side, it allows you to update the correct record, eliminating any chance of updating the wrong record.
- On the Customer side, it allows you to prepopulate the Booking form step with Salesforce record data or completely skip the Booking form step. This eliminates the need to ask Customers for information you already have, improving conversion rates and moving leads through the funnel faster.

The Salesforce Record ID can be used in the following scenarios:

- You can use the Salesforce Record ID in our Personalized links (Salesforce ID) to identify your Customers in your Salesforce email templates or Salesforce emails.
- You can use the Salesforce Record ID in Salesforce scheduling buttons.
- You can use the Salesforce Record ID to personalize scheduling on landing pages used in your email marketing campaigns. Learn more about using Salesforce Record ID to personalize scheduling in landing pages

Prepopulating or skipping the Booking form step in Salesforce integration

Last Modified on Oct 18, 2022

When you schedule with existing Salesforce records, you can decide to prepopulate the Booking form step with Salesforce record data, or completely skip the Booking form step.

Recognizing the Customer by the Salesforce Record ID provides two key benefits:

- On the User side, it allows you to update the correct record, eliminating any chances of updating the wrong record.
- On the Customer side, it eliminates the need to ask Customers for information you already have, improving conversion rates and moving leads through the funnel more efficiently.

Recognizing the Salesforce Record ID

You can recognize the Salesforce Record ID in the following cases:

- You can use the Salesforce Record ID in our Personalized links (Salesforce ID) to identify your Customers in your Salesforce email templates or Salesforce emails.
- You can use the Salesforce Record ID with Salesforce scheduling buttons.
- You can use the Salesforce Record ID to personalize scheduling in landing pages used in your email marketing campaigns. Learn more about using Salesforce Record ID to personalize scheduling in landing pages

Prepopulating the Booking form

In this case, Customers will be presented with a Booking form that works in private mode. When the Booking form uses data stored in your Salesforce CRM, the prepopulated data used in the Booking form is indicated as a checklist and the Customer can provide additional information if required. Learn more about prepopulated Booking forms

The Booking form fields are mapped to Salesforce fields based on the Field validation and the Field mapping steps of the Salesforce connector setup process.

Skipping the Booking form

In this case, Customers will not be presented with a Booking form. This step of the booking process will be skipped, resulting in a faster booking process. When hiding the Booking form, the Customer making the booking cannot provide a meeting subject. For this reason, the meeting subject should be defined by the Owner. If you skip the Booking form and still set the subject to be defined by the Customer, OnceHub will automatically generate a meeting subject, such as *Meeting with John Smith*.

Important:

Since the Customer name and Customer email are mandatory fields in OnceHub, the Booking form will not be skipped if these fields are empty in the Salesforce record. In this case, OnceHub will show a prepopulated Booking form instead of hiding the form, so the Customer will have the opportunity to fill out these fields.

When you add the Mobile phone field to a skipped Booking form with the enable SMS notifications option turned on, the SMS notification opt-in/opt-out will be displayed when the Customer chooses a time for the booking (Figure 1). Booking form skipping can be used with Personalized links, web form integration and login integration.

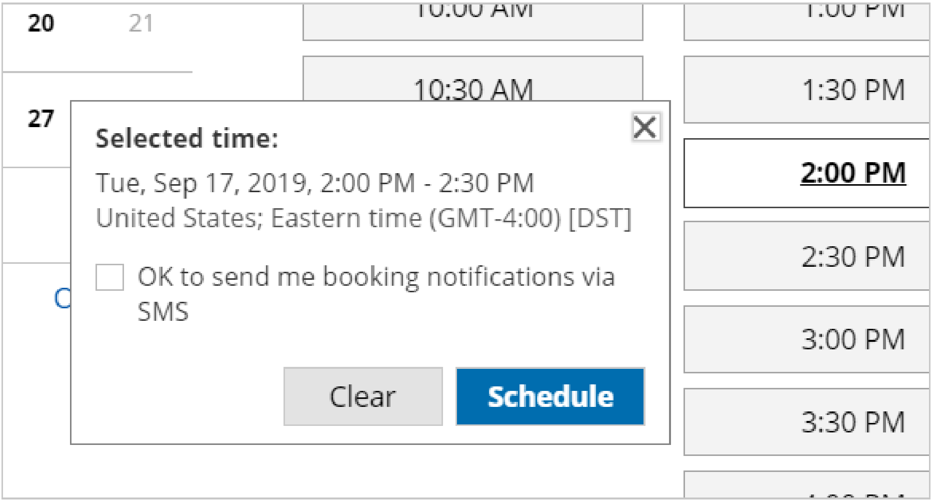


Figure 1: SMS notification opt-in

Note:

For security and privacy reasons, using CRM record IDs to skip or prepopulate the Booking form is not compatible with collecting data from an embedded Booking page or redirecting booking confirmation data.

Using Personalized links (Salesforce ID)

Last Modified on Oct 18, 2022

When you schedule with existing Salesforce Leads, Contacts, Person Accounts, or Case records, you can use our **Personalized links (Salesforce ID)** in your Salesforce email templates and Salesforce emails. Your Customers will be automatically recognized based on their Salesforce Record ID.

In this article, you'll learn about using Personalized links (Salesforce ID).

Key benefits of using Personalized links (Salesforce ID)

Recognizing a Customer by their Record ID provides two key benefits:

- On the User side, it allows you to update the correct record, eliminating any chance of updating the wrong record.
- On the Customer side, it allows you to prepopulate the Booking form step with Salesforce record data or completely skip the Booking form step. This eliminates the need to ask Customers for information you already have, improving conversion rates and moving leads through the funnel faster.

Personalized links (Salesforce ID) are available for Booking pages and Master pages.

- When you work with Booking pages, **Personalized links (Salesforce ID)** will be available only for Booking pages owned by Users connected to Salesforce.
- When you work with Master pages, **Personalized links (Salesforce ID)** will always be available to you. However, Booking pages owned by Users who are not connected to Salesforce will work as General links.

Note:

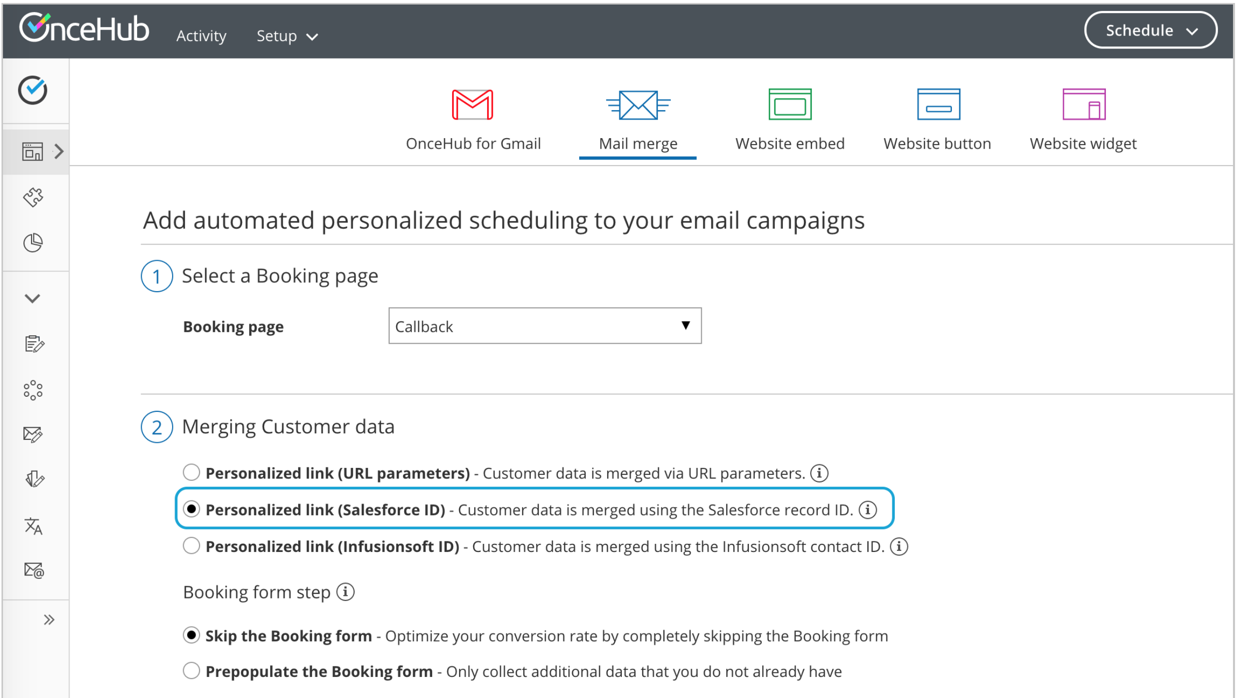
For security and privacy reasons, using CRM record IDs to skip or prepopulate the Booking form is not compatible with collecting data from an embedded Booking page or redirecting booking confirmation data.

Creating a Personalized link (Salesforce ID)

Note:

To use data from a database in a prepopulated Booking form, you must be connected to Salesforce.

1. Log into OnceHub, hover over the lefthand menu. and go to the Booking pages icon → hover over the lefthand sidebar → **Share & Publish**, where you can access the **Mail merge** tab.
2. Select the relevant Booking page or Master page.
3. Under **Merging customer data**, select the **Personalized links (Salesforce ID)** (Figure 1).



4. In the **Booking form** step, you can select one of the two options below:

- **Skip the Booking form:** Skipping the OnceHub Booking form helps you maximize your booking conversions and provides your Customers with a quicker booking process.
- **Prepopulate the Booking form:** The Booking form works in private mode. In this mode, prepopulated data can't be viewed or edited by the Customer before submission. The prepopulated data used in the Booking is indicated as a checklist and the Customer can provide additional information if required. Learn more about prepopulated Booking forms

5. Click **Copy link** to copy the Personalized link to your clipboard (Figure 3). You can now paste the link into your Salesforce email templates and Salesforce emails.

Introduction to Salesforce scheduling buttons

Last Modified on Oct 18, 2022

Salesforce scheduling buttons provide a quick method to schedule on behalf of a Customer. Bookings made via these buttons are automatically added to the Salesforce record that the booking is scheduled from.

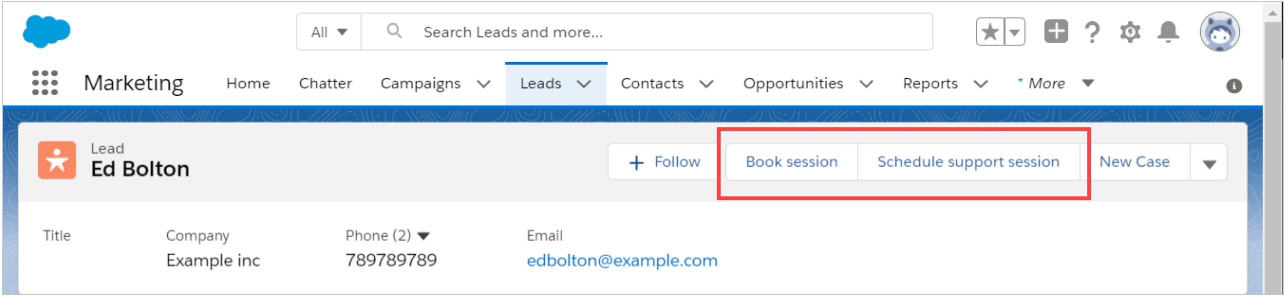


Figure 1: Salesforce scheduling buttons

Salesforce scheduling buttons can be configured to prepopulate the booking form, or skip it altogether. This is enabled by the optional mapping step in the Salesforce setup wizard, where you can define the mapping between Salesforce record fields and OnceHub Booking form fields.

Creating Salesforce scheduling buttons

You can learn more about creating Salesforce scheduling buttons in the following articles:

- Salesforce scheduling buttons for Contacts, Leads, and Cases
- Salesforce scheduling buttons for Person Accounts
- Salesforce scheduling buttons for Opportunities

Salesforce scheduling buttons for Contacts, Leads and Cases

Last Modified on Oct 18, 2022

Salesforce scheduling buttons provide a quick method to schedule on behalf of a Customer. Bookings made via these buttons are automatically added to the Salesforce record that the booking is scheduled from.

Salesforce scheduling buttons can be configured to prepopulate the booking form, or skip it altogether. This is enabled by the optional mapping step in the Salesforce setup wizard, where you can define the mapping between Salesforce record fields and OnceHub Booking form fields.

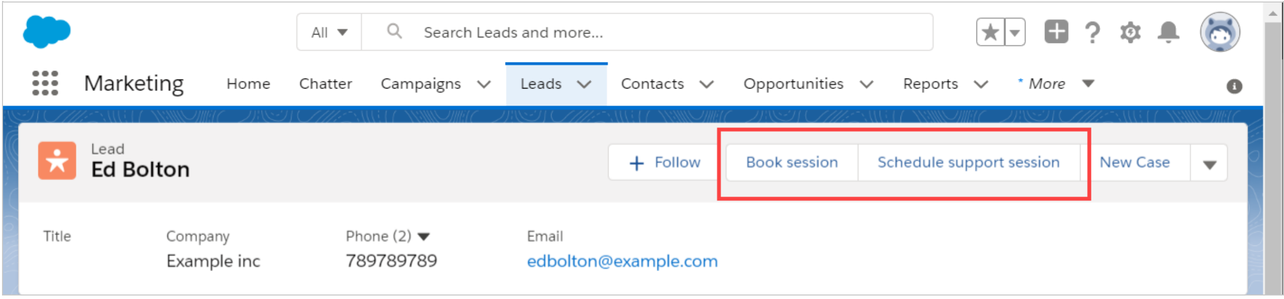


Figure 1: Salesforce scheduling buttons

In this article, you'll learn how to create a Salesforce schedule button and add it to the **Lead**, **Contact** or **Case** Page Layouts in Salesforce.

Requirements

To add a button to the **Lead**, **Contact**, or **Case** Page Layouts in Salesforce, you will need the following:

- A Salesforce Administrator for your organization.
- A completed Salesforce connector setup in OnceHub.
- A OnceHub User connected to Salesforce.

Creating a button in Salesforce

1. Sign in to Salesforce as your API User.
2. Go to the **Setup** page.
3. In the **Platform Tools** section, go to **Objects and Fields -> Object Manager** (Figure 2).

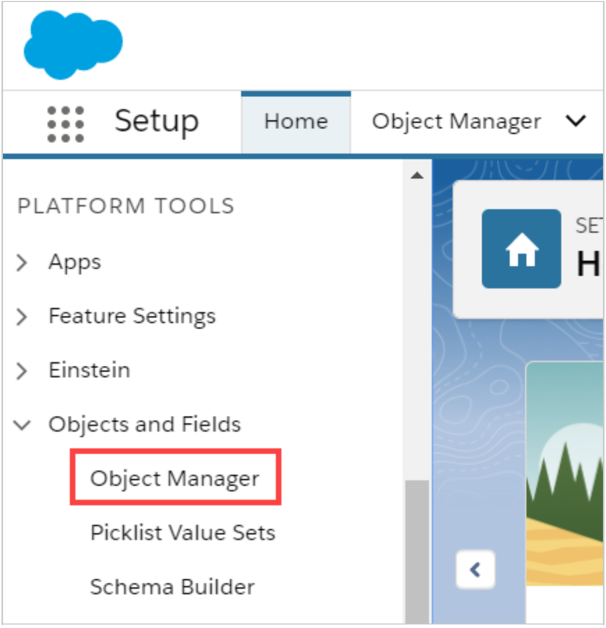


Figure 2: Object Manager in the Objects and Fields menu

4. In the **Object Manager** list, select the **Lead**, **Contact**, or **Case** object depending on which one you want to create a button for (Figure 3).

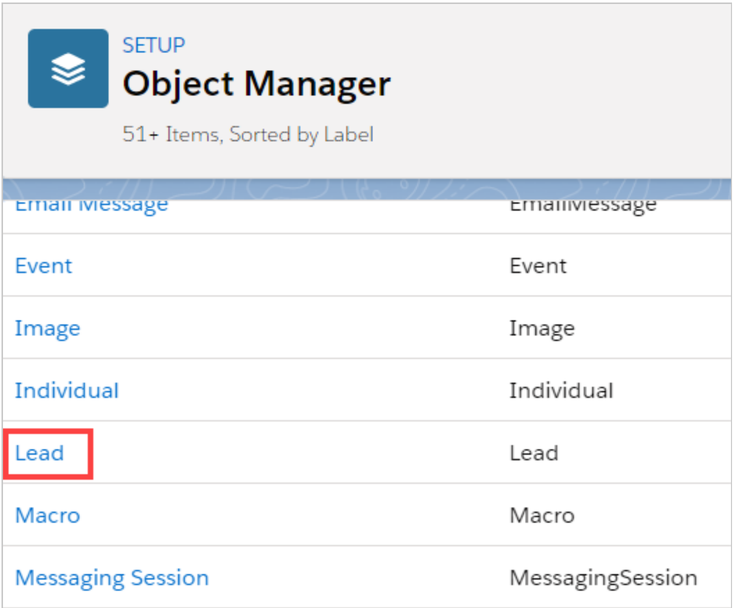


Figure 3: Lead in the Object Manager list

5. Select **Buttons, Links, and Actions -> New Button or Link** (Figure 4).

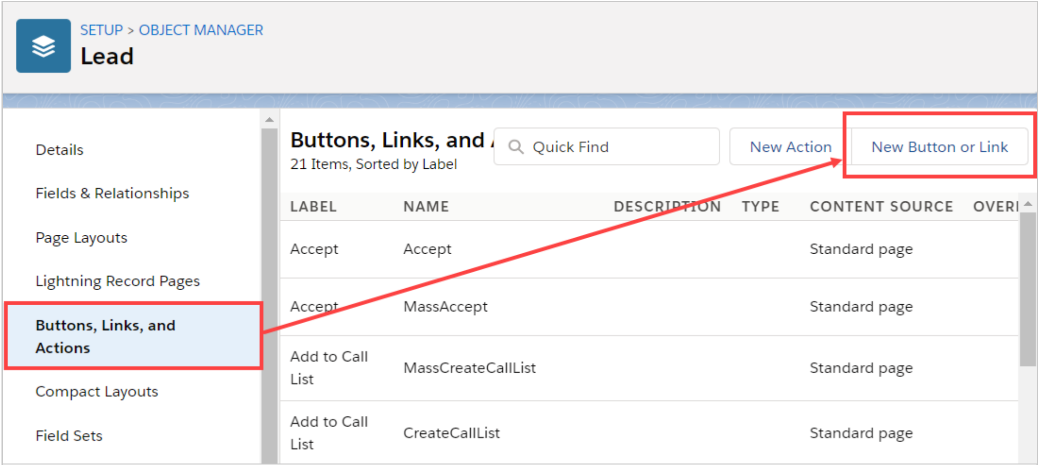


Figure 4: New Button or Link

6. In the **New Button or Link** pane, enter the following information (Figure 5):

- **Label:** This is the text that will be displayed on the button.
- **Name:** Enter a unique name for the button.
- **Description:** Enter a description for the button.
- **Display Type:** Select **Detail Page Button**.
- **Behavior:** Select **Display in new window**.
- **Content Source:** Select **URL**.

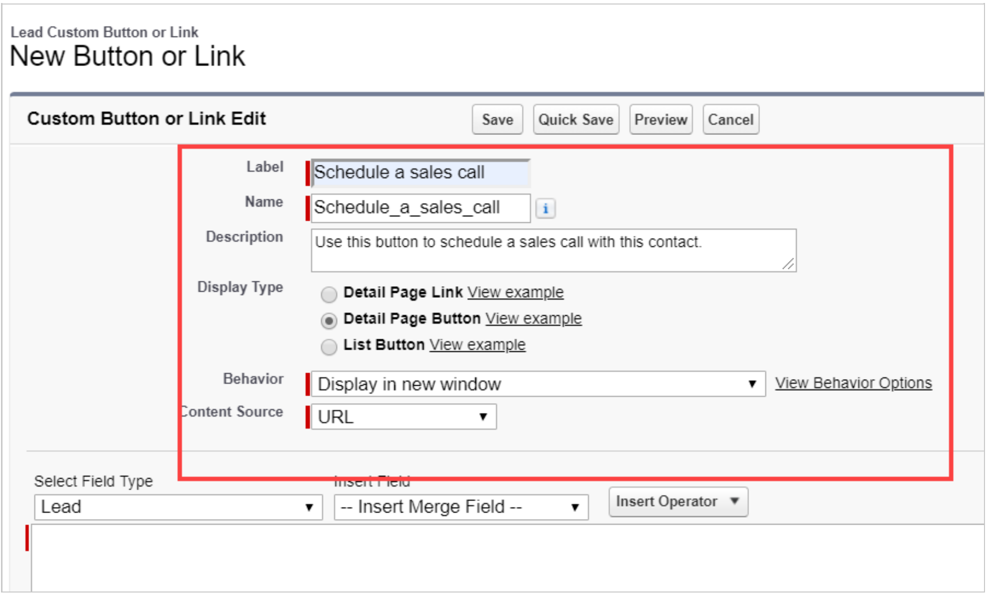


Figure 5: New Button or Link pane

7. Copy the following link and paste it in the large text box (Figure 6).

```
https://go.oncehub.com/EXAMPLEBOOKINGPAGE?soSkip=1&sosfLeadId={!Lead.Id}&sosfContactId={!Contact.Id}&sosfCaseId={!Case.Id}
```

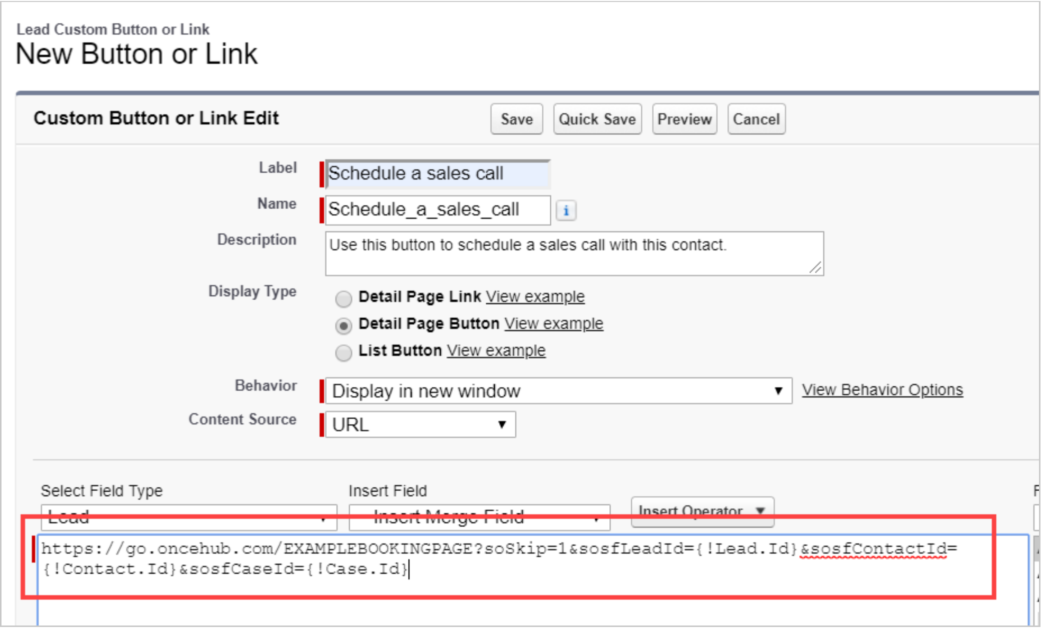


Figure 6: Paste link in the large text box

8. Replace the placeholder URL (Figure 7) with the Public link of the Booking page or Master page that you want to use for the new button. You can find the Public link in the Booking page Overview section or Master page Overview section.

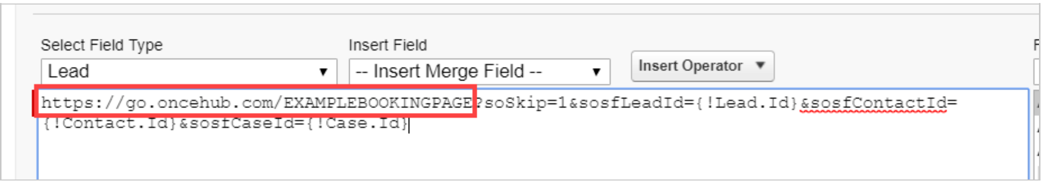


Figure 7: Placeholder URL text

For example, if you want to create a button for a Booking page with the Public link *https://go.oncehub.com/danafisher*, your finished link would be:

https://go.oncehub.com/danafisher?soSkip=1&sosfLeadId={!Lead.Id}&sosfContactId={!Contact.Id}&sosfCaseId={!Case.Id}

9. Click **Save.**

Adding a button to Salesforce Page Layouts

The next step is to add the new button you created to the relevant Salesforce Page Layout.

> **Note:**
>
> Page Layouts control which buttons are visible. If you want to display your custom buttons only to specific Salesforce Users, you can assign your Page Layouts to specific Users. Learn more about assigning Page Layouts to Profiles

1. In the **Lead**, **Contact**, or **Case** page, click **Page Layouts** and then select the Layout you want to add a button to (Figure 8).

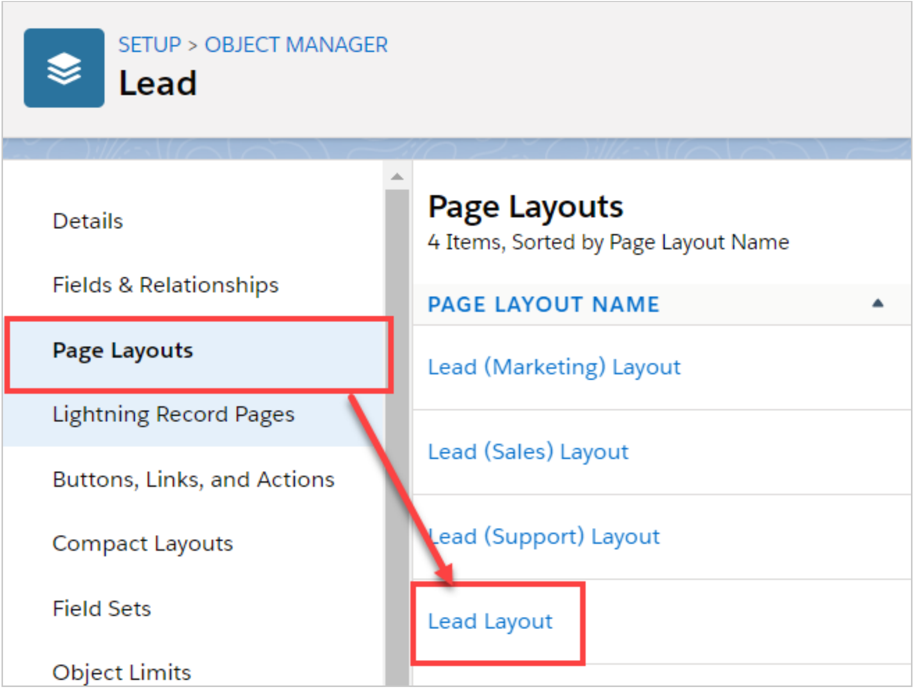


Figure 8: Page Layouts

2. In the Lead Layout editor, select **Mobile & Lightning Actions** (Figure 9).

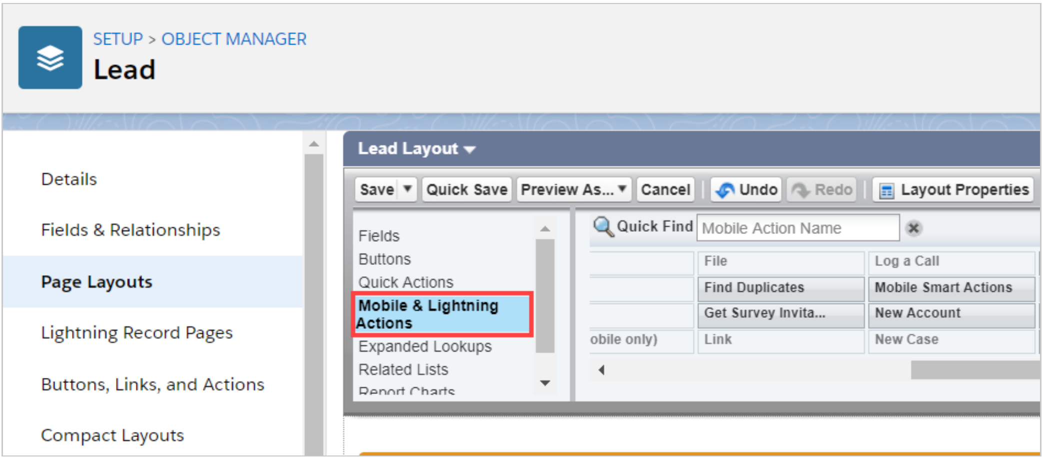


Figure 9: Mobile and Lightning Actions

3. Click and drag the button that you want to add to the **Salesforce Mobile and Lightning Experience Actions** section (Figure 10).

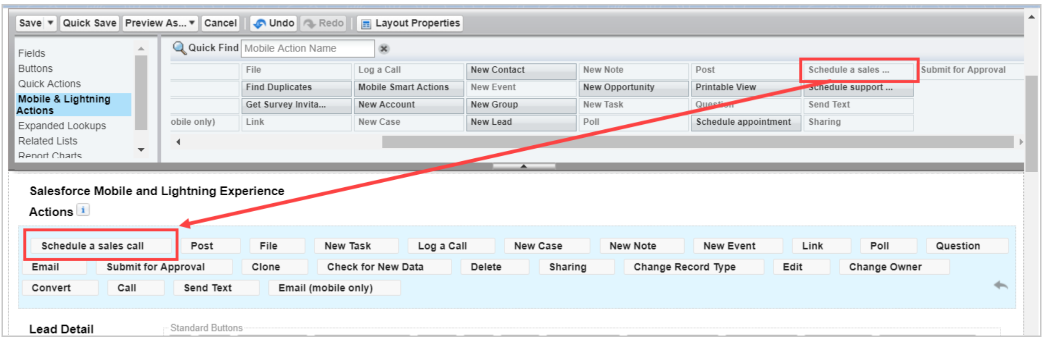


Figure 10: Add button to Salesforce Mobile and Lightning Experience Actions section

4. Click **Save**.

You're all set! Your button is now ready to use on your **Lead**, **Contact**, or **Case** pages.

Salesforce scheduling buttons for Person Accounts

Last Modified on Oct 18, 2022

Salesforce scheduling buttons for Person Accounts provide a quick method to schedule on behalf of a Customer. A schedule button on the Person Account record allows quick scheduling with the Person Account's related Contact record. Bookings made via these buttons are automatically added to the Salesforce record that the booking is scheduled from.

Salesforce scheduling buttons can be configured to prepopulate the booking form, or skip it altogether. This is enabled by the optional mapping step in the Salesforce setup wizard, where you can define the mapping between Salesforce record fields and OnceHub Booking form fields.

In this article, you will learn how to add the **Schedule with Me** button to the Person Account Page Layouts in Salesforce.

Requirements

To add the **Schedule with Me** button to the Person Account Page Layouts in Salesforce, you will need:

- A Salesforce Administrator for your organization.
- A completed Salesforce connector setup in OnceHub.
- A OnceHub User connected to Salesforce.

Creating a Contact Lookup field

First, we will add a custom Lookup field to the Person Account record.

1. Sign in to Salesforce as your API user.
2. Go to the **Setup** page.
3. In the **Platform Tools** section, go to **Objects and Fields -> Object Manager** (Figure 1).

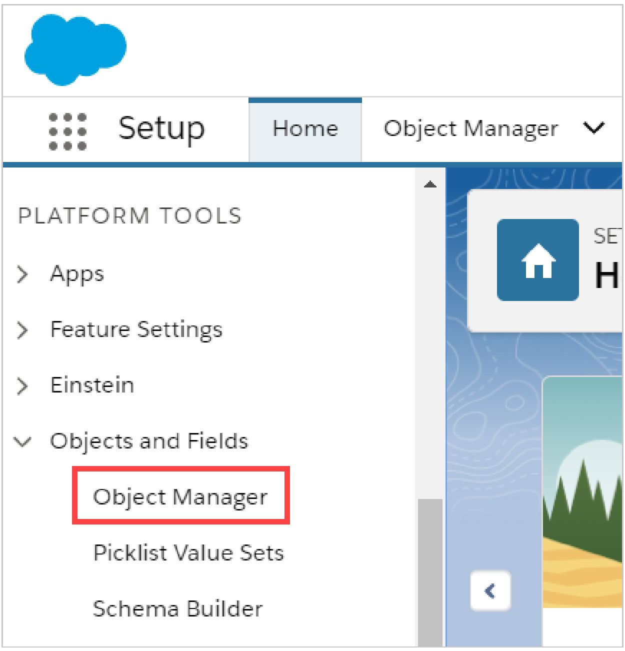


Figure 1: Object Manager in the Objects and Fields menu

4. In the **Object Manager** list, select the **Account** object (Figure 2).

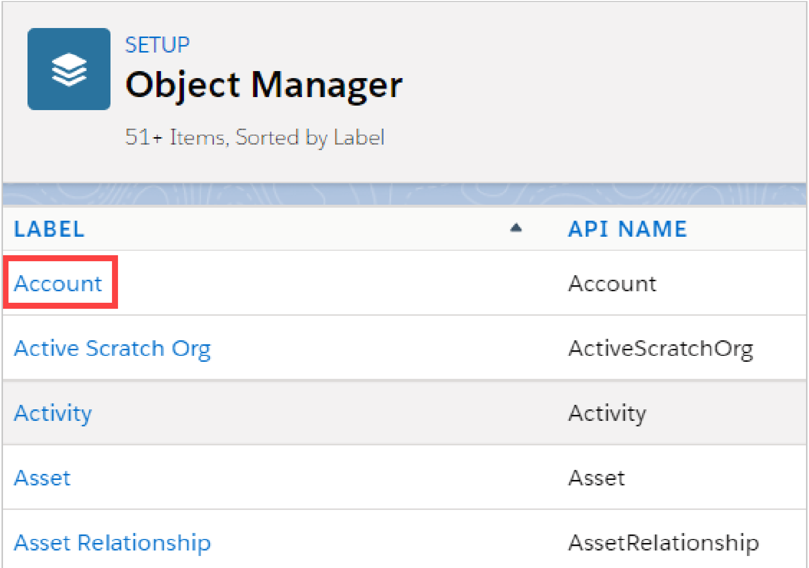


Figure 2: Account object in the Object Manager list

5. Select **Field & Relationships -> New** (Figure 3).

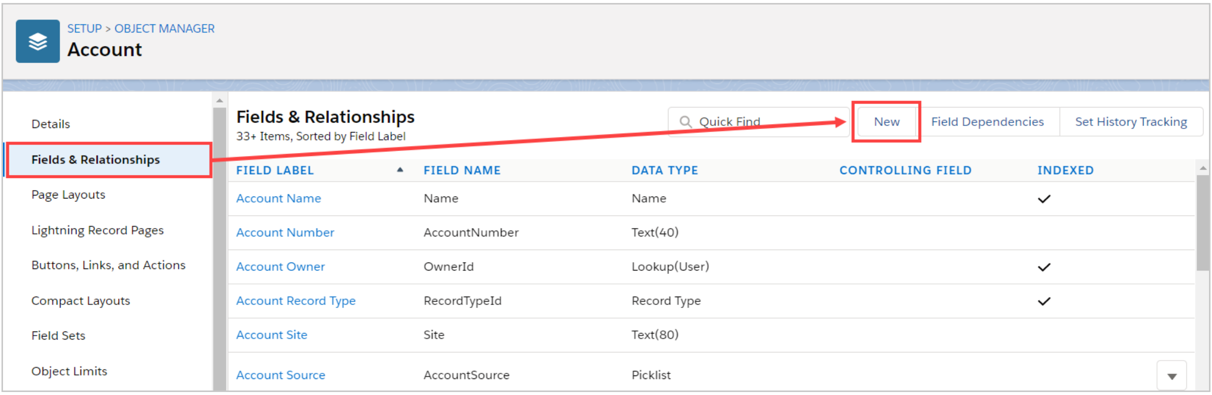


Figure 3: Fields & Relationships

6. In the **New Custom Field** pane, select **Lookup Relationship** and click **Next** (Figure 4).

Figure 4: Lookup Relationship

7. In the **Related to** drop-down, select **Contact**.
8. Click **Next**.
9. Enter a label and name for the Lookup field, then click **Next** (Figure 5).

- Field Label: **Contact**
- Field Name: **Contact_ID**

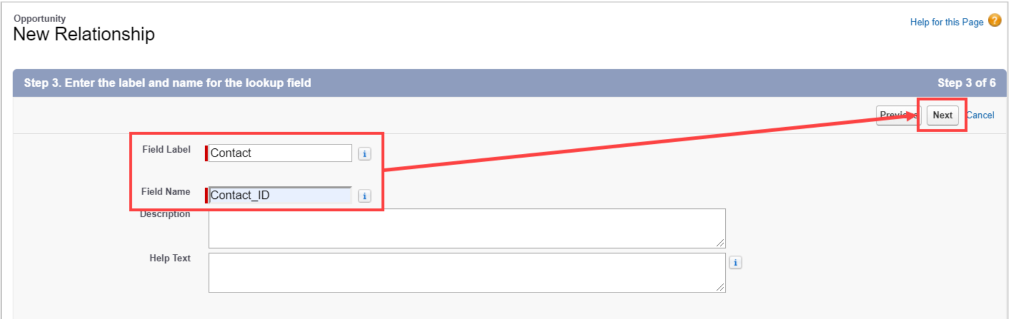


Figure 5: New Relationship

10. In Step 4 and Step 5, click **Next**.
11. In Step 6, click **Save**.

Creating a button in Salesforce

Now you can create the button to add to the Person Accounts Page Layout. The button will retrieve the Contact ID from the custom Contact Lookup field. When clicked, you will be able to make a booking on behalf of the Contact added to that Person Account.

> **Note:**
>
> You can also follow the steps below for Custom objects. In this case, the button and the custom Lookup field should be added to a Custom object instead of the Person Account Page Layout.

1. Go to the **Setup** page.
2. In the **Platform Tools** section, go to **Objects and Fields -> Object Manager**.
3. Select the **Account** object.
4. Select **Buttons, Links, and Actions -> New Button or Link** (Figure 6).

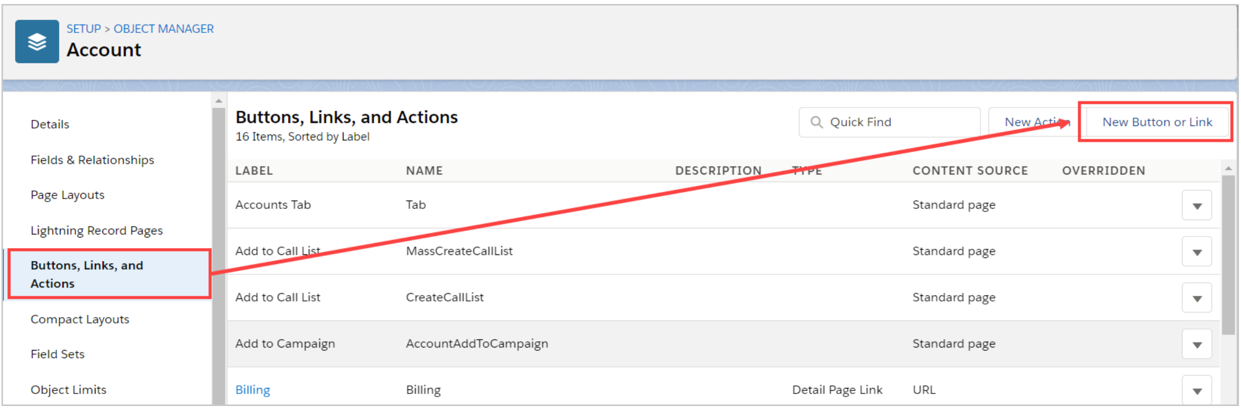


Figure 6: New Button or Link

5. In the **New Button or Link** pane, enter the following information:

- Label: **Schedule with related Contact**
- Name: **Schedule_with_related_Contact**
- Description: **This button allows you to schedule meetings on behalf of the Contact related to this Person Account record.**
- Display Type: **Detail Page Button**

- Behavior: **Display in new window**
- Content Source: **URL**

6. Copy the following link and paste it in the large text box (Figure 7).

```
https://go.oncehub.com/EXAMPLEBOOKINGPAGE?so&Skip=1&sfLeadId={!Lead.Id}&sfContactId={!Account.Contact_IDid__c}&sfCaseId={!Case.Id}
```

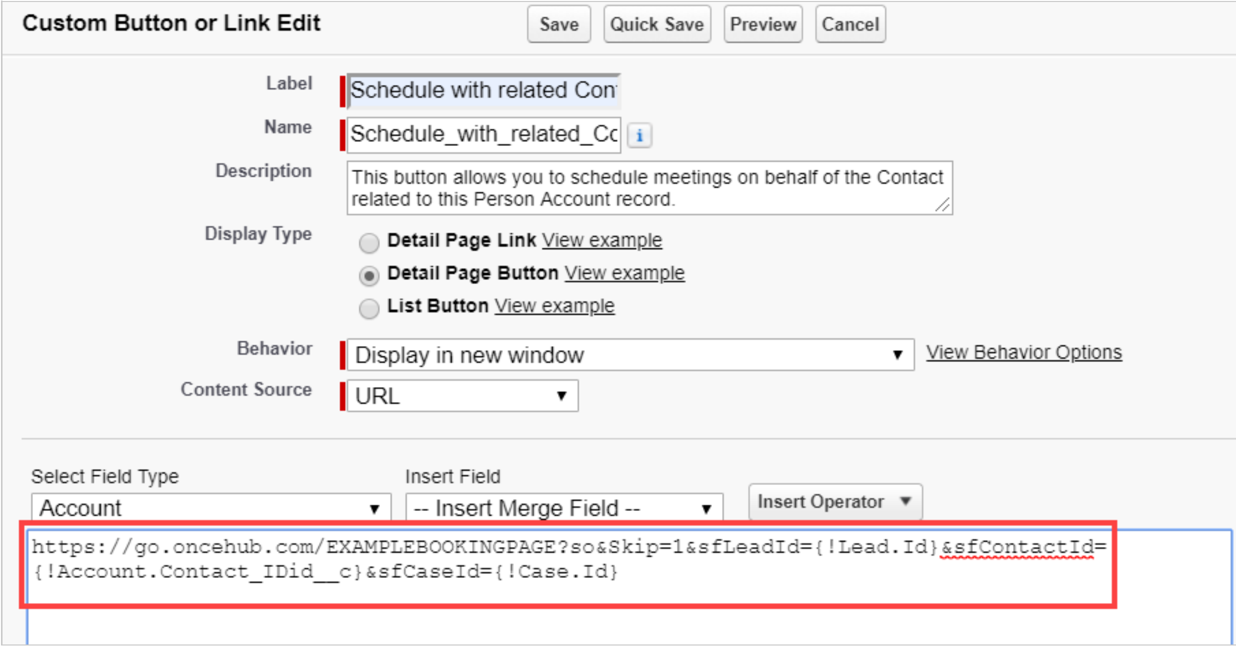


Figure 7: Paste link in the large text box

7. Replace the placeholder URL (Figure 8) with the Public link of the Booking page or Master page that you want to use for the new button. You can find the Public link in the Booking page Overview section or Master page Overview section.

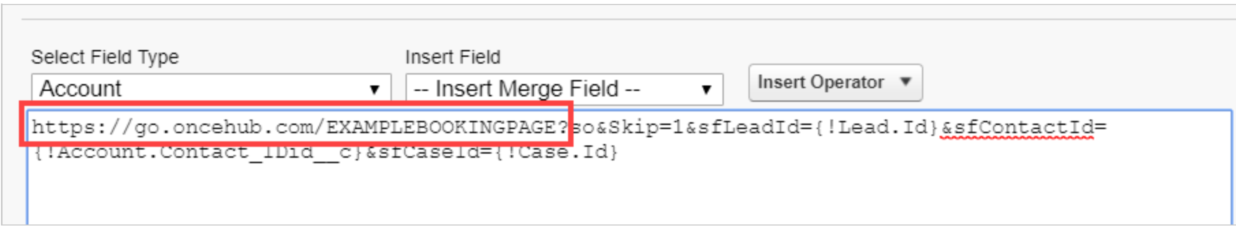


Figure 8: Placeholder URL text

For example, if you want to create a button for a Booking page with the Public link *https://go.oncehub.com/danafisher*, your finished link would be:

https://go.oncehub.com/danafisher?soSkip=1&sosfLeadId={!Lead.Id}&sosfContactId={!Account.Contact_IDid__c}&sosfCaseId={!Case.Id}

8. Click **Save.**

Adding a button to Salesforce Page Layouts

The next step is to add the new button you created to the Person Accounts Page Layout. The button will retrieve the Contact ID from the custom Contact Lookup field. When clicked, you will be able to make a booking on behalf of the Contact added to that Person Account.

> **Note:**
>
> Page Layouts control which buttons are visible. If you want to display the buttons only to specific Salesforce Users, you can assign your Page Layouts to specific Users. Learn more about assigning Page Layouts to Profiles

1. Go to the **Setup** page.
2. Enter **Person Accounts** in the Quick Find box.
3. Select **Page Layouts**.
4. In the Layout editor, select **Mobile & Lightning Actions**.
5. Click and drag the **Schedule with related Contact** button to the **Salesforce Mobile and Lightning Experience Actions** section.
6. Click **Save**.

Salesforce scheduling buttons for Opportunities

Last Modified on Jun 15, 2023

Salesforce scheduling buttons provide a quick method to schedule on behalf of a Customer. A schedule button on the Opportunity record allows quick scheduling with the Opportunity's related Contact record. Bookings made via these buttons are automatically added to the Salesforce record that the booking is scheduled from.

Salesforce scheduling buttons can be configured to prepopulate the booking form, or skip it altogether. This is enabled by the optional mapping step in the Salesforce setup wizard, where you can define the mapping between Salesforce record fields and OnceHub Booking form fields.

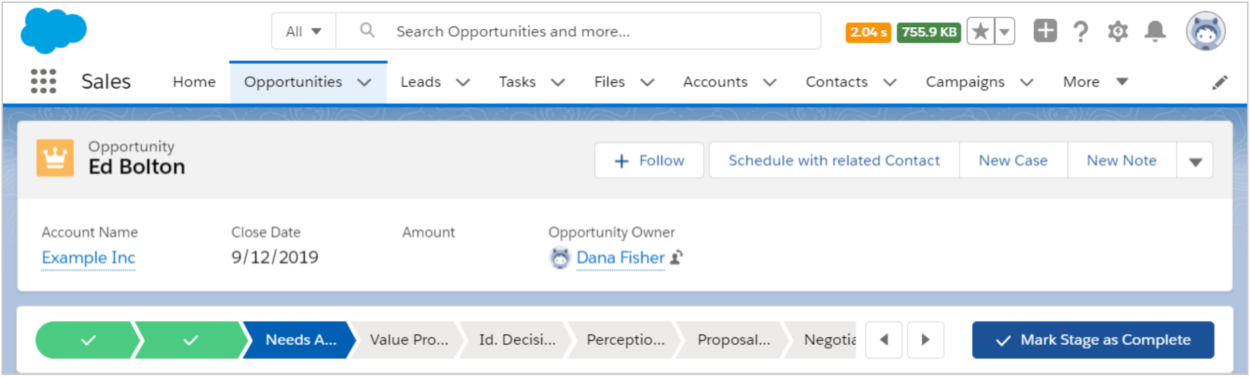


Figure 1: Schedule with related Contact button

In this article, you'll learn how to add the **Schedule with related Contact** button to the Opportunity record Page Layouts in Salesforce.

Requirements

To add the **Schedule with related Contact** button to the Opportunity Page layouts in Salesforce, you will need:

- A Salesforce Administrator for your organization.
- A completed Salesforce connector setup in OnceHub.
- A OnceHub User connected to Salesforce.

Creating a Contact Lookup field

First, we will add a Lookup custom field to the Opportunity record.

1. Sign in to Salesforce as your API User.
2. Go to the **Setup** page.
3. In the **Platform Tools** section, go to **Objects and Fields -> Object Manager** (Figure 2).

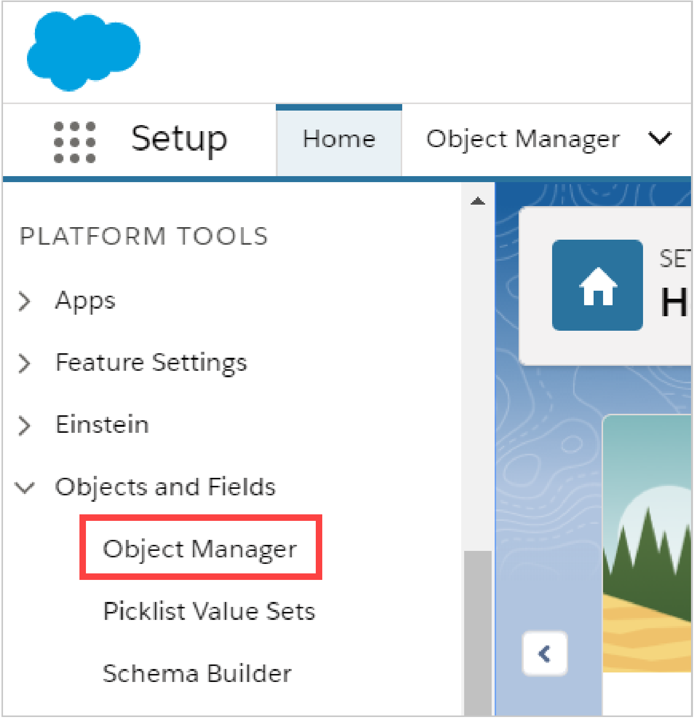


Figure 2: Object Manager in the Objects and Fields menu

4. In the **Object Manager** list, select the **Opportunity** object (Figure 3).

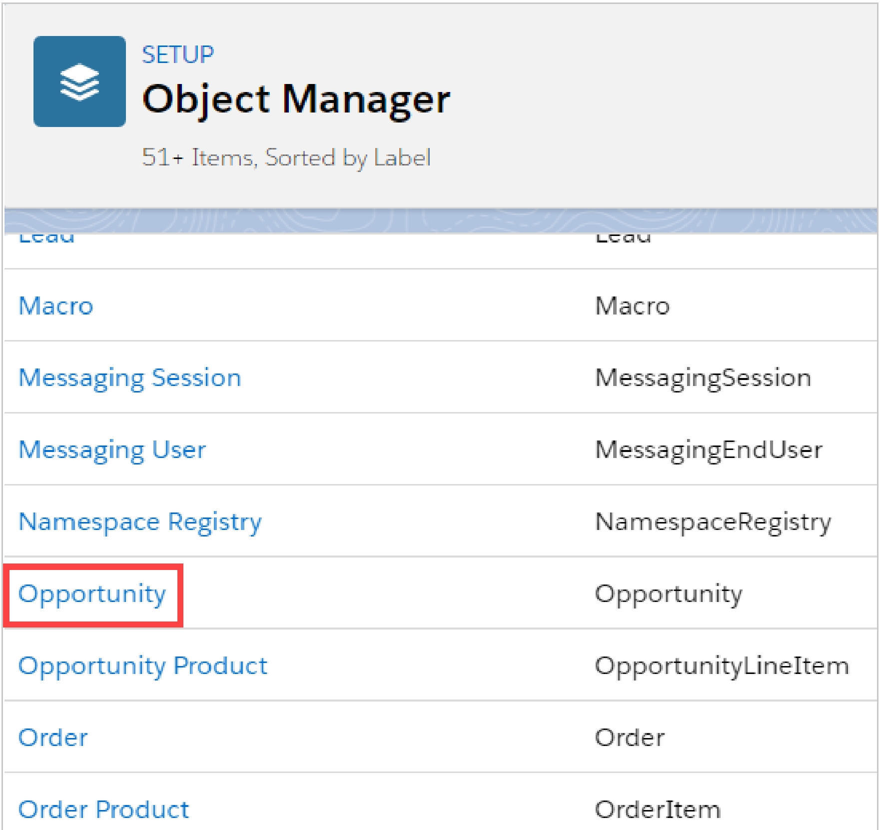


Figure 3: Opportunity in the Object Manager list

5. Select **Field & Relationships -> New** (Figure 4).

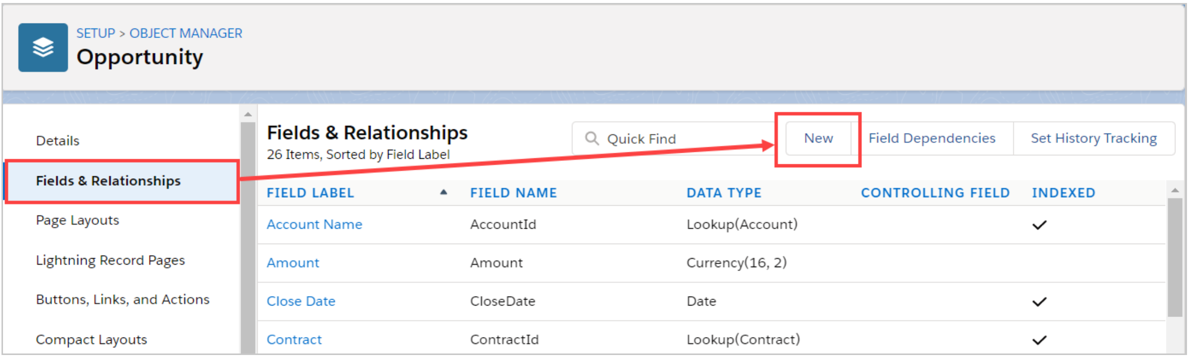


Figure 4: Fields & Relationships

6. In the **New Custom Field** pane, select **Lookup Relationship** and **Next** (Figure 5).

Figure 5: New Custom Field—Step 1

7. In the **Related to** drop-down menu, select **Contact**.
8. Click **Next**.
9. Enter a label and name for the Lookup field, then click **Next** (Figure 6).

- Field Label: **Contact**
- Field Name: **Contact_ID**

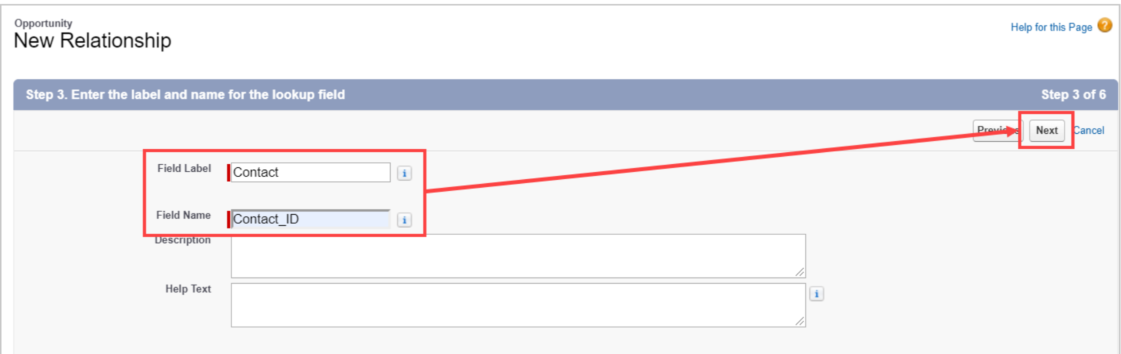


Figure 6: New Relationship

10. In Step 4 and Step 5, click **Next**.
11. In Step 6, click **Save**.

Creating a button in Salesforce

Now you can create the button to add to the Opportunity Page Layout. The button will retrieve the Contact ID from the custom Contact Lookup field. When clicked, you will be able to make a booking on behalf of the Contact added to that Opportunity.

> **Note:**
>
> You can also follow the steps below for Custom objects. In this case, the button and the custom Lookup field should be added to a Custom object instead of the Opportunity Page Layout.

1. Go to the **Setup** page.
2. In the **Platform Tools** section, go to **Objects and Fields -> Object Manager**.
3. Select the **Opportunity** object.
4. Select **Buttons, Links, and Actions -> New Button or Link** (Figure 7).

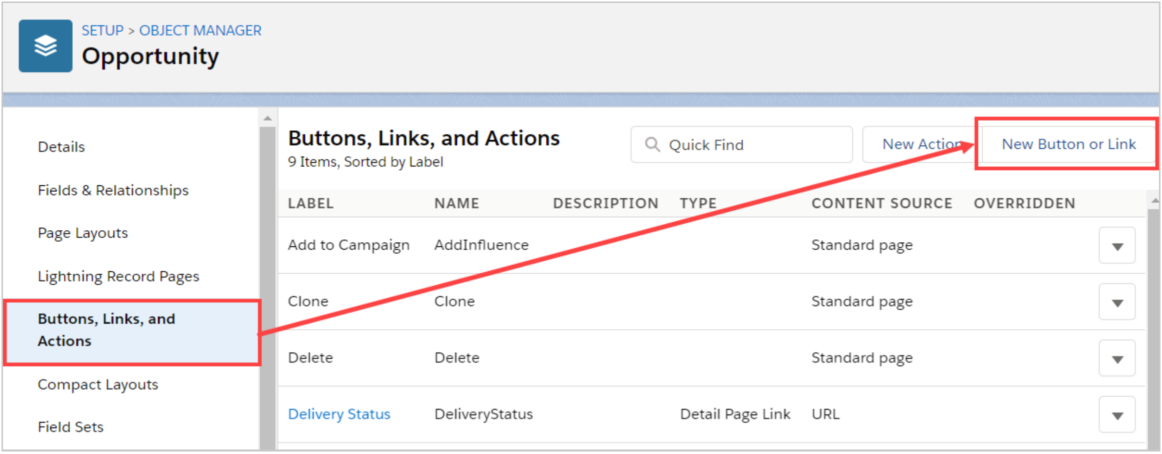


Figure 7: New Button or Link

5. In the **New Button or Link** pane, enter the following information:

- Label: **Schedule with related Contact**
- Name: **Schedule_with_related_Contact**
- Description: **This button allows you to schedule meetings on behalf of the Contact related to this Opportunity record.**
- Display Type: **Detail Page Button**
- Behavior: **Display in new window**
- Content Source: **URL**

6. Copy the following link and paste it in the large text box (Figure 8).

```
https://go.oncehub.com/EXAMPLEBOOKINGPAGE?so&Skip=1&sfLeadId={!Lead.Id}&sfContactId={!Opportunity.Contact_IDid__c}&sfCaseId={!Case.Id}
```

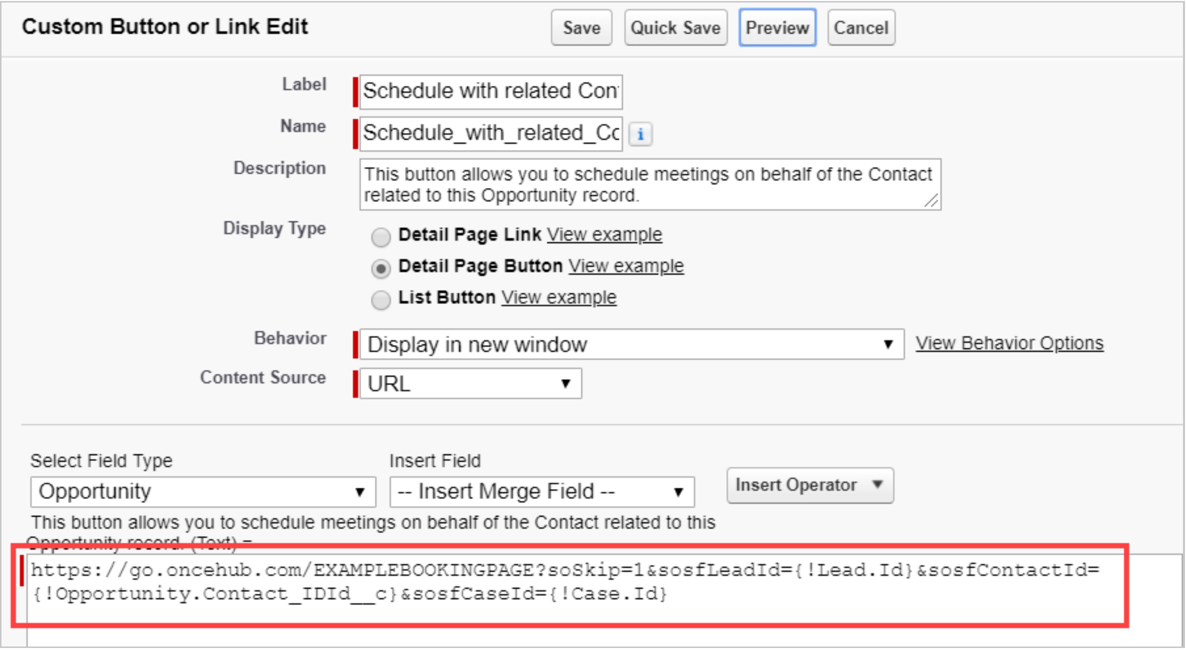


Figure 8: Paste link in the large text box

7. Replace the placeholder URL (Figure 9) with the Public link of the Booking page or Master page that you want to use for the new button. You can find the Public link in the Booking page Overview section or Master page Overview section.

Figure 9: Placeholder URL text

For example, if you want to create a button for a Booking page with the Public link *https://go.oncehub.com/danafisher*, your finished link would be:

https://go.oncehub.com/danafisher?soSkip=1&sosfLeadId={!Lead.Id}&sosfContactId={!Opportunity.Contact_IDid__c}&sosfCaseId={!Case.Id}

8. Click **Save.**

Adding a button to Salesforce Page Layouts

The next step is to add the new button you've created to the relevant Salesforce Opportunity Page Layouts.

> **Note:**
>
> Page Layouts control which buttons are visible. If you want to display the buttons only to specific Salesforce Users, you can assign your Page Layouts to specific Users. Learn more about assigning Page Layouts to Profiles

1. In **Opportunities**, click **Page Layouts** and then select the Layout you want to add a button to (Figure 10).

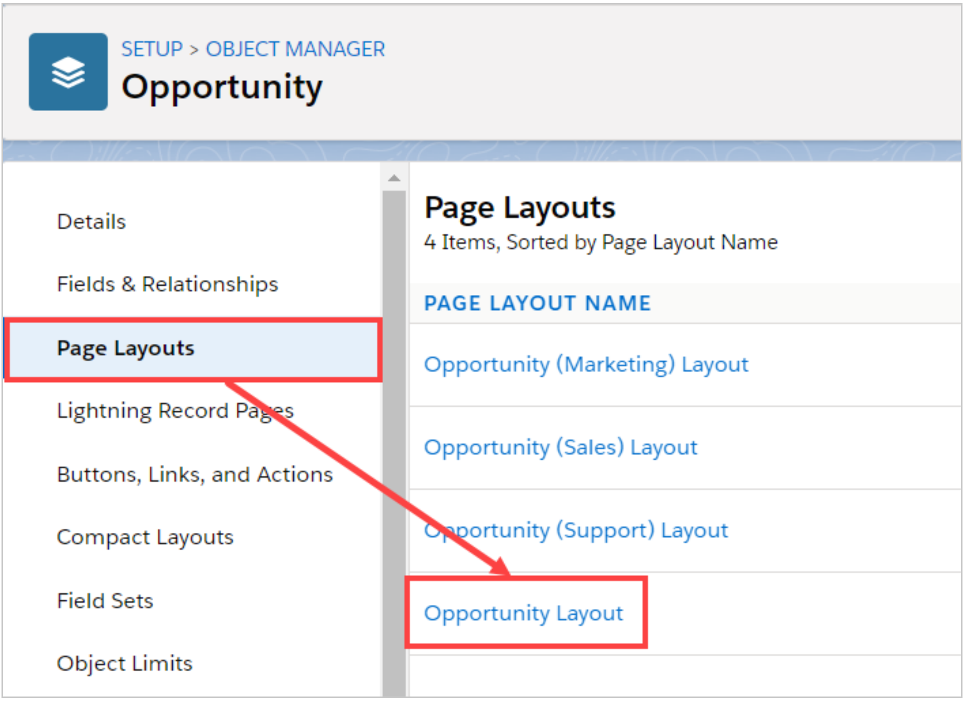


Figure 10: Page Layouts

2. In the Opportunity Layout editor, select **Mobile & Lightning Actions** (Figure 11).

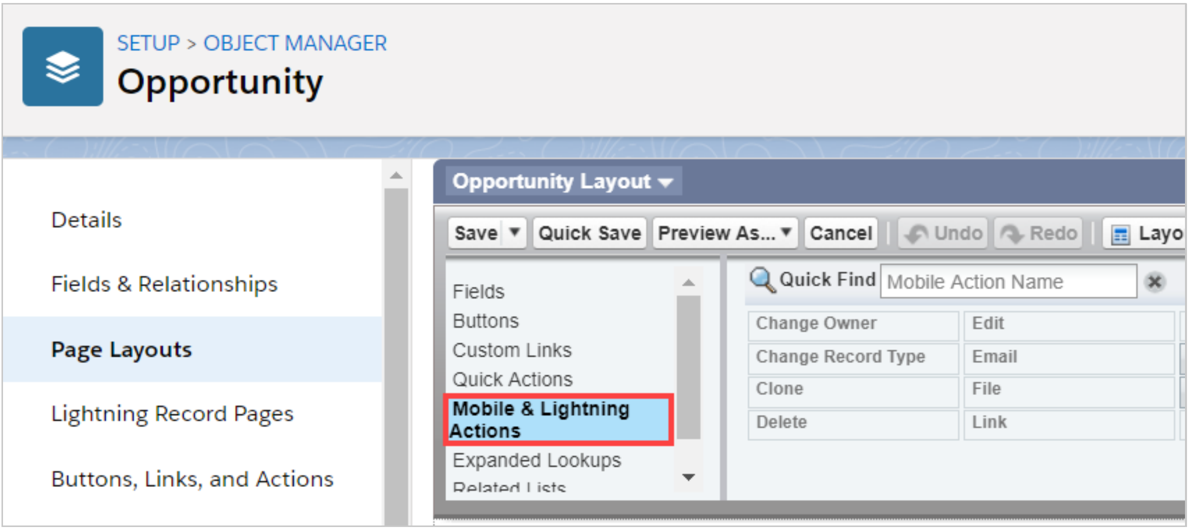


Figure 11: Mobile & Lightning Actions

3. Click and drag the **Schedule with related Contact** button to the **Salesforce Mobile and Lightning Experience Actions** section (Figure 12).

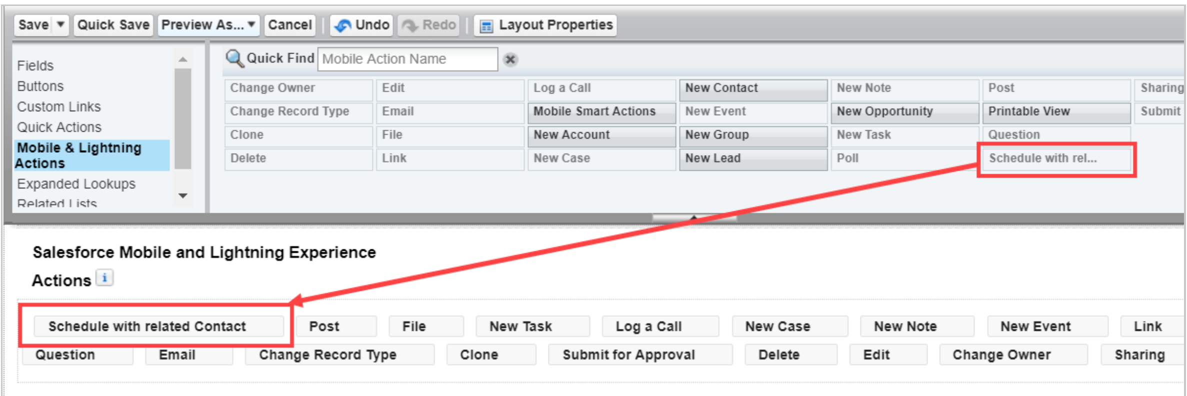


Figure 12: Add button to Salesforce Mobile and Lightning Experience Actions section

4. Click **Save**.

You're all set! Your button is now ready to use on your Opportunity pages.

Using Salesforce Record IDs to personalize scheduling on landing pages

Last Modified on Feb 28, 2023

You can use Salesforce Record IDs to personalize the booking process on your landing pages. Recognizing the Customer by their record ID provides two key benefits:

- On the User side, it allows you to update the correct record, eliminating any chances of updating the wrong record.
- On the Customer side, it allows you to prepopulate the Booking form step with Salesforce record data or completely skip the Booking form step. This eliminates the need to ask Customers for information you already have, improving conversion rates and moving leads through the funnel more efficiently.

In this article, you'll learn how to pass the Salesforce Record ID to your landing pages. Then, you'll learn how to generate the personalized website embed or button code for your landing pages.

> **Note:**
>
> If the Customer is not recognized based on the Salesforce Record ID, OnceHub will use the Customer's email address to check if the record already exists in your CRM. Learn more about integrating with Salesforce

Requirements

To use Salesforce Record IDs with your landing pages, you must:

- Be a OnceHub Administrator.
- Have a completed Salesforce connector setup in OnceHub.
- Have a OnceHub User connected to Salesforce.

> **Note:**
>
> For security and privacy reasons, using CRM record IDs to skip or pre-populate the Booking form is not compatible with collecting data from an embedded Booking page or redirecting booking confirmation data.

OnceHub parameters for Salesforce

To recognize the Customer by the Salesforce Record ID, you need to pass the OnceHub parameters for Salesforce to your landing page:

- Lead Record ID: *sosfleadid*
- Contact Record ID: *sosfcontactid*
- Case Record ID: *sosfCaseId*

You can also add an additional variable to your landing page to skip the Booking form step:

- Hiding the Booking form: *soSkip=1*

Important:

When working with Salesforce Person Accounts, you will need to pass the related Contact Record ID and ensure that the Person Account includes a Contact ID lookup field.

Step 1: Constructing the landing page's URL parameters

There are different operators used in the syntax of your URL:

- **?** - You must add the question mark to separate your URL from the variables.
- **&** - You can pass multiple variables by separating the variables with the ampersand
- **=** - The equal sign separates the variable from the value assigned to that variable.

Take the following example landing page link:

```
http://www.example.com
```

If you wanted to pass a Salesforce Lead Record ID with a value which is E9888900, you can add the following to the webpage link:

```
http://www.example.com?sosfleadid=E9888900
```

If you wanted to pass the variable to skip the Booking form step as well, you could add the skip variable to the link:

```
http://www.example.com?sosfcontactid=E9888900&soSkip=1
```

Step 2: Generate the personalized code for your landing pages

Now that you have passed the Salesforce Record Id to your landing page, you need to ensure that you have placed the personalized website embed or button code on your landing page.

1. In OnceHub, go to **Share & Publish**.
2. Select the **Website embed** tab or **Website button** tab.
3. Select **Customer data is passed using the Salesforce record ID (web form integration)** from the **Customer data** step.
4. Copy and paste the relevant code in your landing page.

Important:

If the Website embed or button code placed on your webpage was added prior to November 7, 2015, you will need to replace it with the updated OnceHub code.

How to maximise booking rates in Salesforce Campaigns

Last Modified on Oct 18, 2022

When booking appointments is part of your email marketing campaigns, optimizing your booking rates becomes critical. In this article, you'll learn how to configure Salesforce Campaigns so that you track both bookings made, and more importantly, booking invitations that were missed or ignored. By tracking missed bookings, you'll be able to retarget them and increase the overall booking rates for your campaign.

Note:

For security and privacy reasons, using CRM record IDs to skip or pre-populate the Booking form is not compatible with collecting data from an embedded Booking page or redirecting booking confirmation data.

Requirements

To update Salesforce fields when the Customer schedules or reschedules an event, you must:

- Be a OnceHub administrator.
- Be a Salesforce Administrator for your organization.
- Have an active connection to your Salesforce API User.

Let's assume that the Lead Status field includes the **Working – Contacted** and the **Open – Not contacted** options. To configure Salesforce Campaigns so that you can track both bookings made and booking invitations that were missed or ignored, you will also need to do the following:

- Create an Event Status text Custom field for the Lead object and add it to the Lead Page Layout.
- Map the OnceHub Status field to the Lead Event Status field.

The **Event Status** Custom field is used as a criteria to manage your campaign's Lead members.

Note :

When multiple events are booked for the same Lead, the **Event Status** custom field represents the last event status update.

Setting up Salesforce Campaigns to retarget missed bookings

Salesforce Campaigns enables you to automatically trigger the missed bookings campaign. For this example, let's look at a lead qualification use case, whereby you want to send an email broadcast to a List of unqualified leads, inviting them to book a discovery call.

Tag leads that DID make a Booking

1. Sign in to Salesforce.
2. Go to the **Sales** app.
3. Click the **Campaign** tab and click **New** (Figure 1).

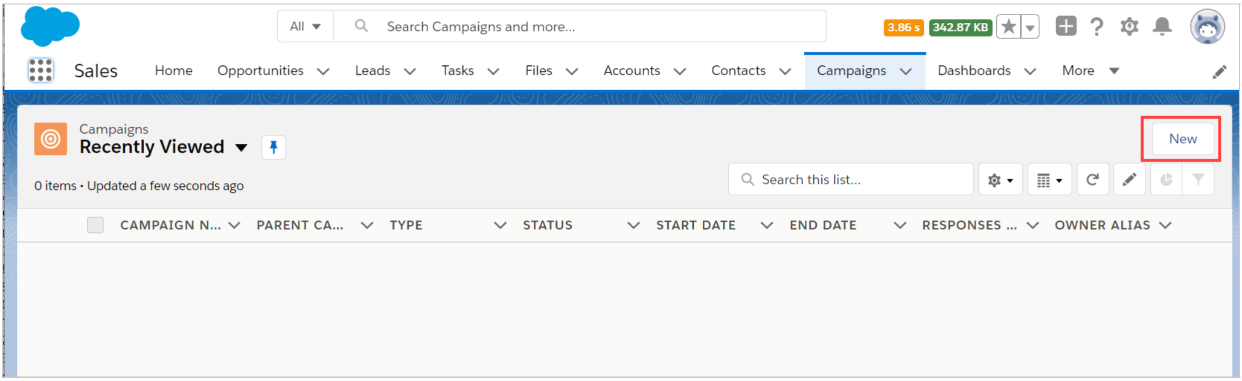


Figure 1: Create a new Campaign

4. Enter "Booked" as the name for the campaign.
5. In the **Type** drop-down menu, select **Email**.
6. Check the **Active** checkbox.
7. Click **Save**.
8. Click the **Leads** tab.
9. Click the gear icon and select **New** from the **List View Controls** drop-down menu (Figure 2).

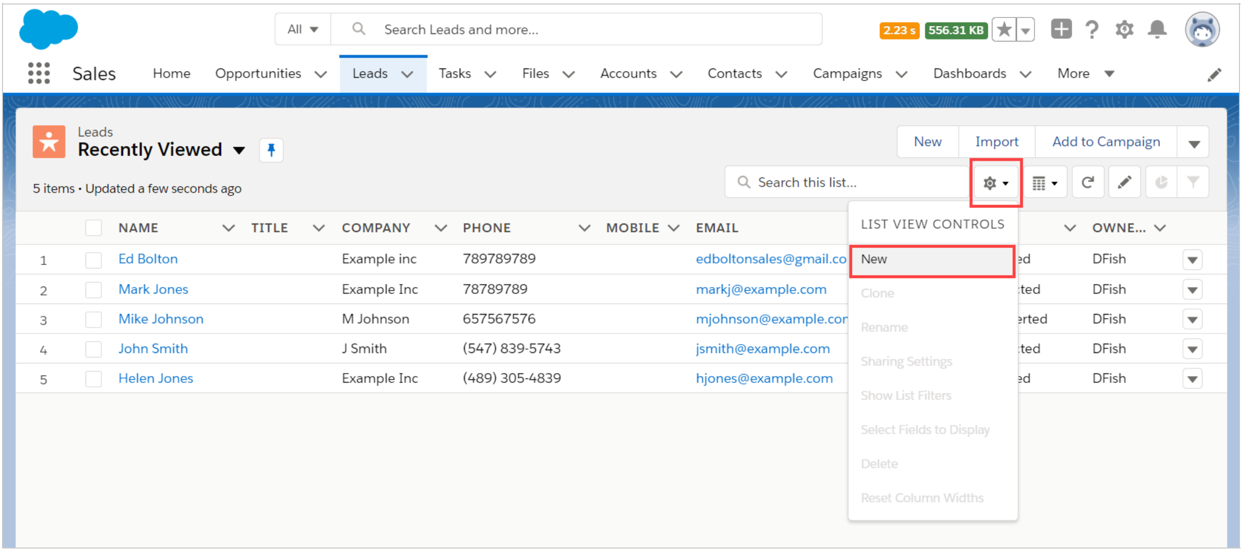


Figure 2: List View Controls

10. In the **New List View** pop-up, give the list a name and select who can view this list (Figure 3).

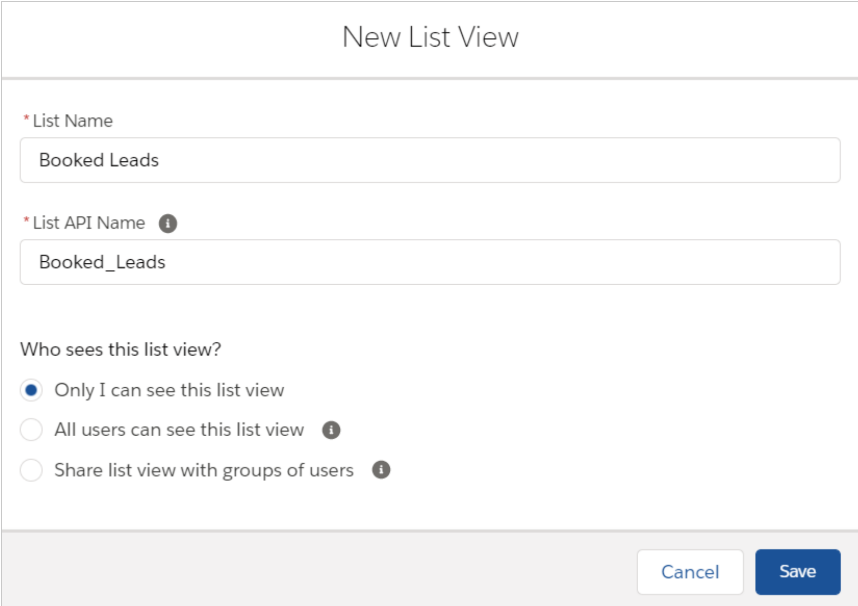


Figure 3: New List View pop-up

11. In the **Filters** sidebar, click **Add Filter** (Figure 4).

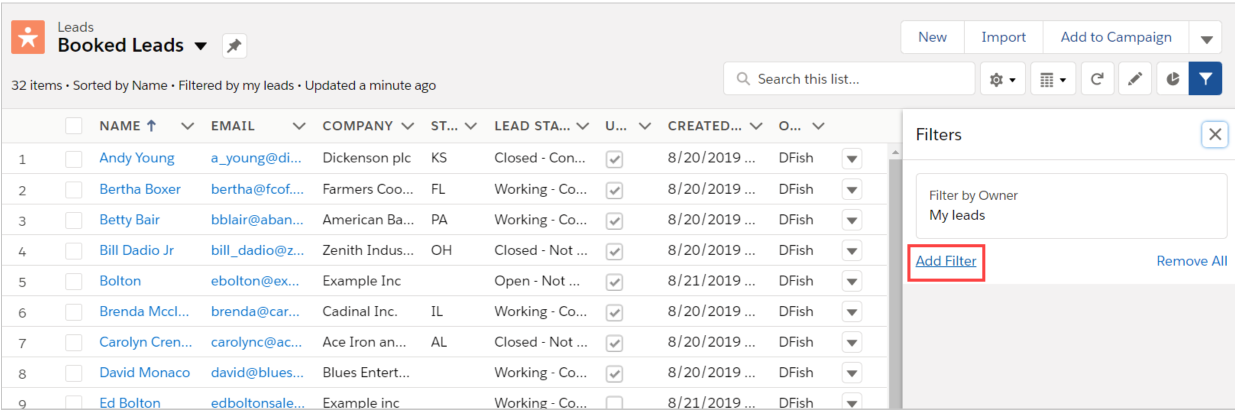


Figure 4: Add Filter

12. From the **Field** drop-down menu, select **Event Status**.
13. From the **Operator** drop-down menu, select **Contains**.
14. In the **Value** field, add **"Scheduled"** (Figure 5). Click **Done**.

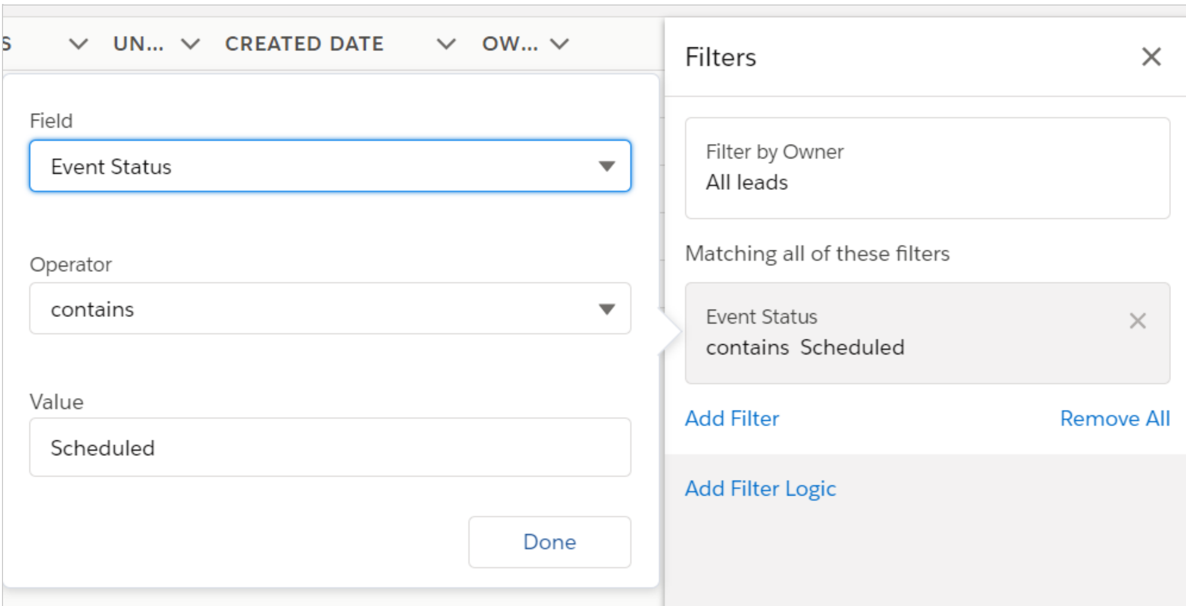


Figure 5: Event Status contains Scheduled

15. Add another filter and select **contains** from the **Operator** drop-down menu. This time, in the **Value** field add **"Rescheduled"** and click **Done**.
16. Click **Add Filter Logic**.
17. Change the Filter Logic to **1 OR 2** (Figure 6).

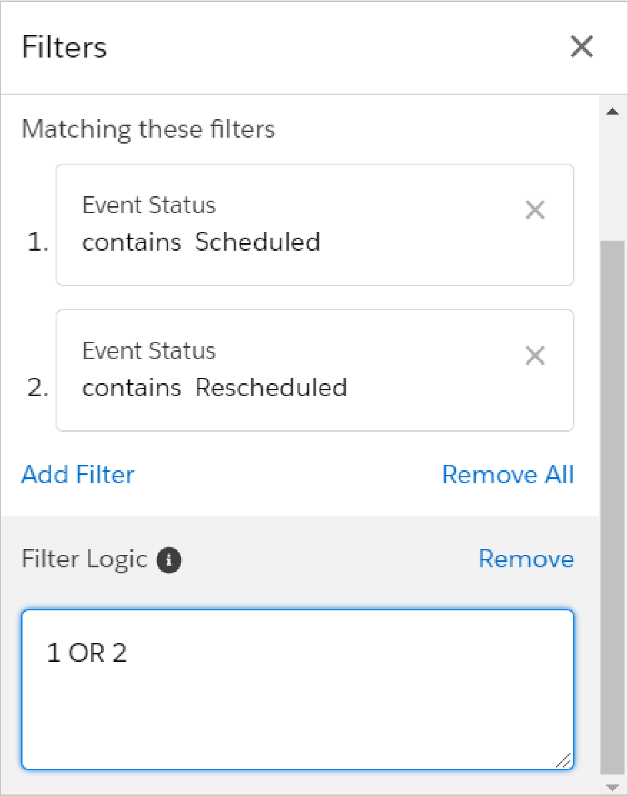


Figure 6: Edit Filter Logic

18. Click **Save**. You will now see a list of any Leads that match the criteria.
19. Click the checkbox at the top of the list to select all of the Members in this Filter View (Figure 7). Click the **Add to Campaign** button.

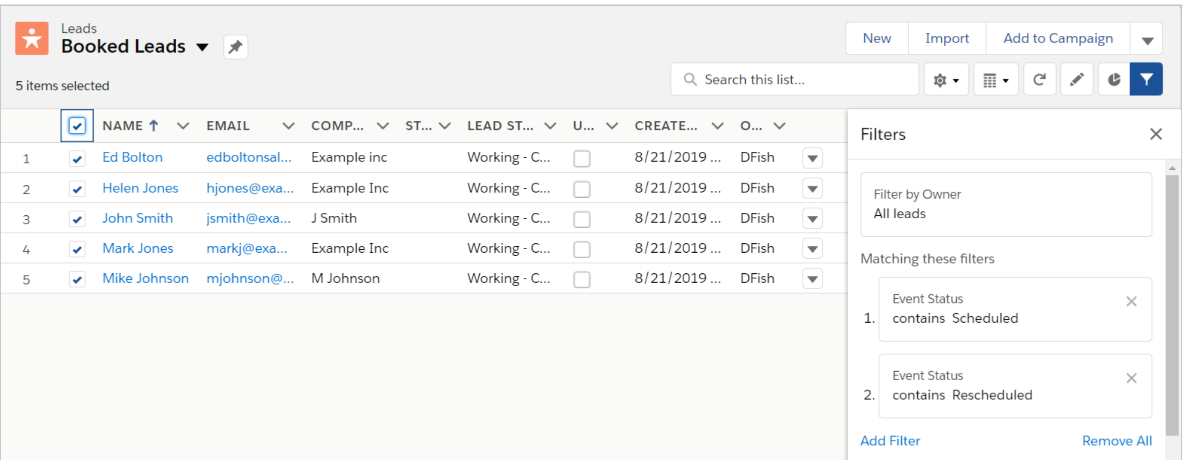


Figure 7: Select Members

20. In the **Add to Campaign** pop-up, select the campaign you created (Figure 8).

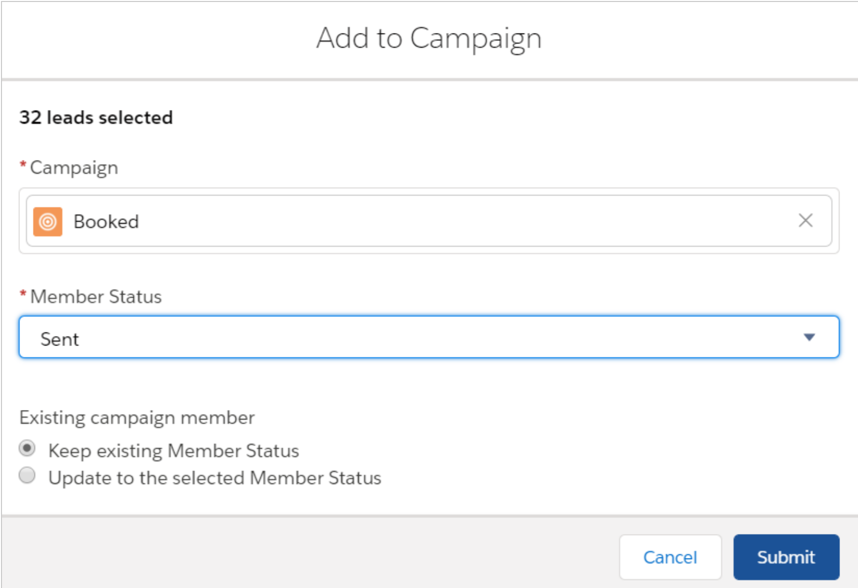


Figure 7: Add to Campaign pop-up

21. Click **Submit**.

Retarget leads that DID NOT make a Booking

1. Go to the **Sales** app.
2. Click the **Campaign** tab and click **New**.
3. Enter "Retarget Missed Bookings" as the name for the campaign. This campaign will target those who did not make a booking from the first campaign.
4. Check the **Active** checkbox.
5. In the **Type** drop-down menu, select **Email**.
6. Set the **Start Date** to start automatically several days after the initial marketing campaign was run.
7. Click **Save**.
8. Click the **Leads** tab. We will create a list of the members that do NOT belong to the **Booked Leads** group. This group will contain all those who have received the initial email and didn't open, click or made a booking.
9. Click the gear icon and select **New** from the **List View Controls** drop-down menu.
10. In the **New List View** pop-up, give the list a name and select who can view this list (Figure 8).

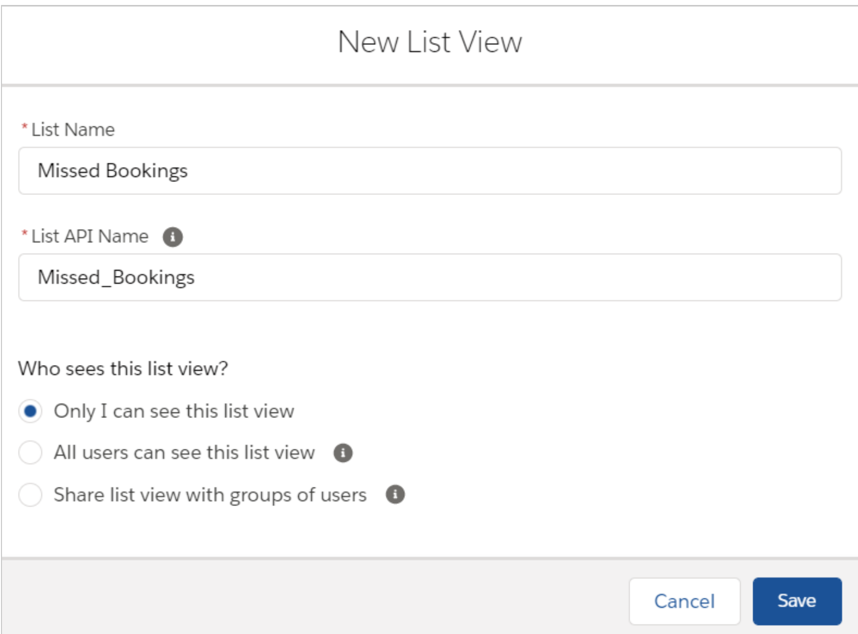


Figure 8: New List View pop-up

11. In the **Filters** sidebar, click **Add Filter**.
12. From the **Field** drop-down menu, select **Event Status**.
13. From the **Operator** drop-down menu, select **does not contain**.
14. In the **Value** field, add **"Scheduled"** (Figure 9). Click **Done**.

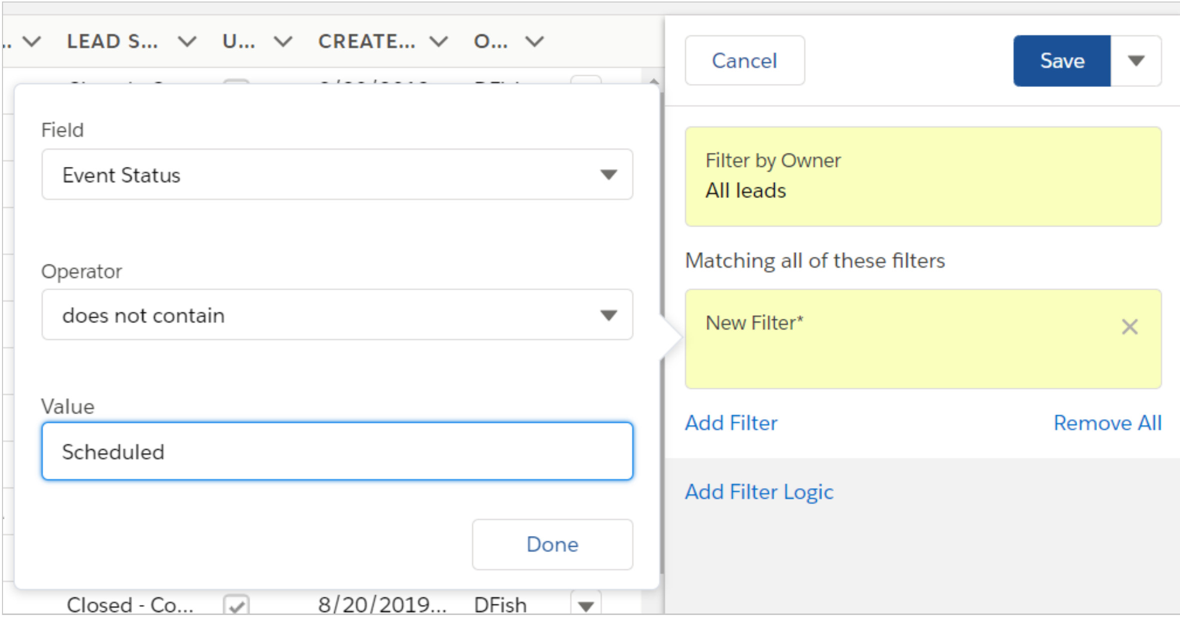


Figure 9: Event Status does not contain Scheduled

15. Add another filter and select **Does not contain** from the **Operator** drop-down menu. This time, in the **Value** field add **"Rescheduled"** and click **Done**.
16. Click **Add Filter Logic**.
17. Change the Filter Logic to **1 OR 2**.
18. Click **Save**. You will now see a list of any Leads that match the criteria.
19. Click the checkbox at the top of the list to select all of the Members in this Filter View (Figure 10). Click the **Add to Campaign** button.

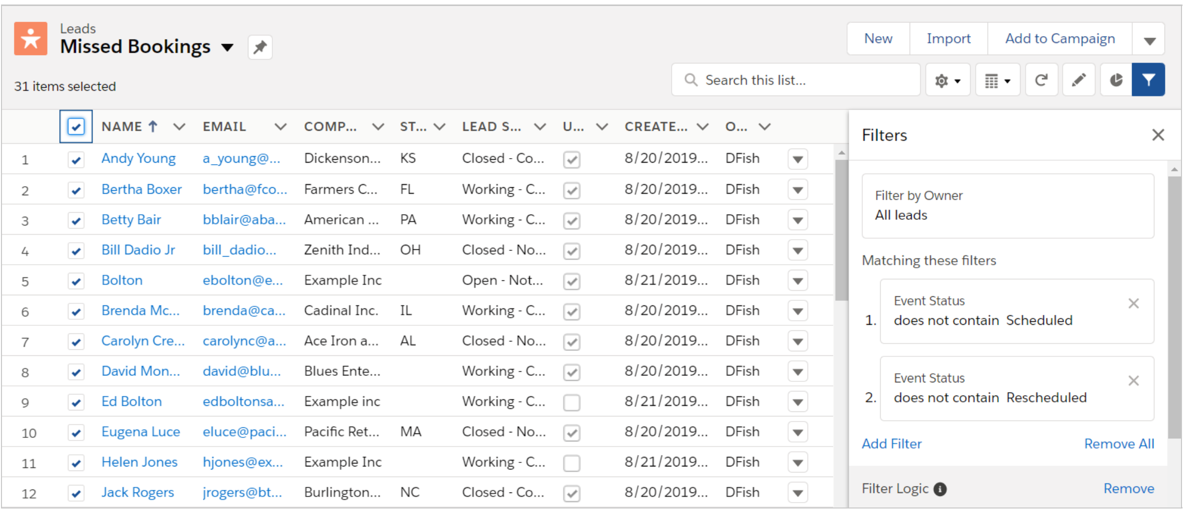


Figure 10: Select Members

20. In the **Add to Campaign** pop-up, select the campaign you created (Figure 11).

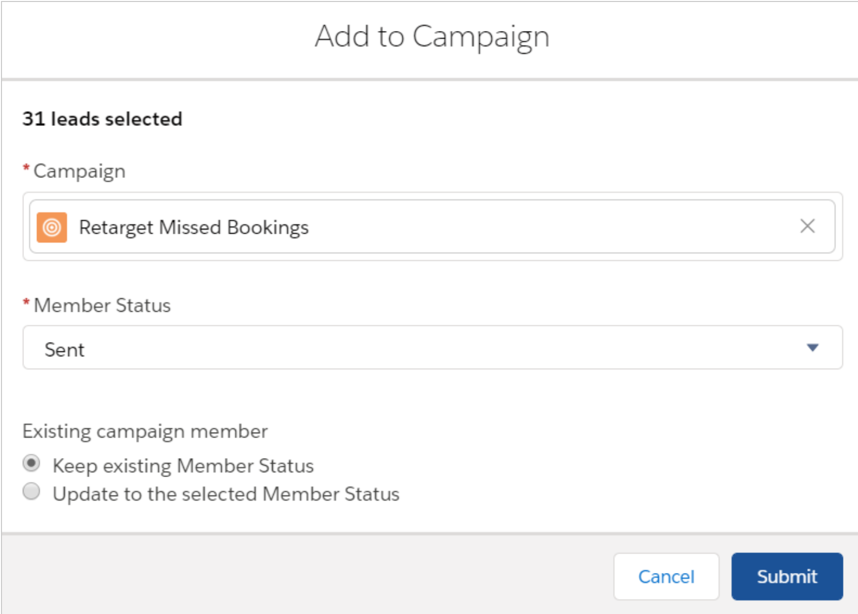


Figure 11: Add to Campaign pop-up

21. Click **Submit**.
22. Run your initial marketing campaign and make sure to monitor your **Retarget Missed Bookings** campaign.

> **Note:**
>
> You should retarget leads that didn't make a booking multiple times to continuously maximize your booking rates.

Connecting to Salesforce

Last Modified on Oct 23, 2023

In this article, you'll learn how to connect OnceHub to your Salesforce account. This

Each OnceHub user connects to their personal Salesforce account. If you're a OnceHub Administrator, you can also set up the connector after connecting to your Salesforce account. You do not need an assigned product license to install and update Salesforce account settings. Learn more - **Common use cases for users without a license.**

Connecting to Salesforce

1. Sign in to your OnceHub account.
2. Select the gear icon in the top right-hand corner → **CRM**.
3. Click **Go to Booking page CRM integrations**.
4. From the Salesforce box, click the **Setup** button.
5. You will be redirected to the Salesforce sign-in page and asked to enter your Username and password. Once you enter your credentials, OnceHub will establish the connection to Salesforce and you will be redirected to the CRM integration page.
6. On the CRM integration page, you can see that you are connected to your Salesforce account. You can also view the connector status (Figure 1).

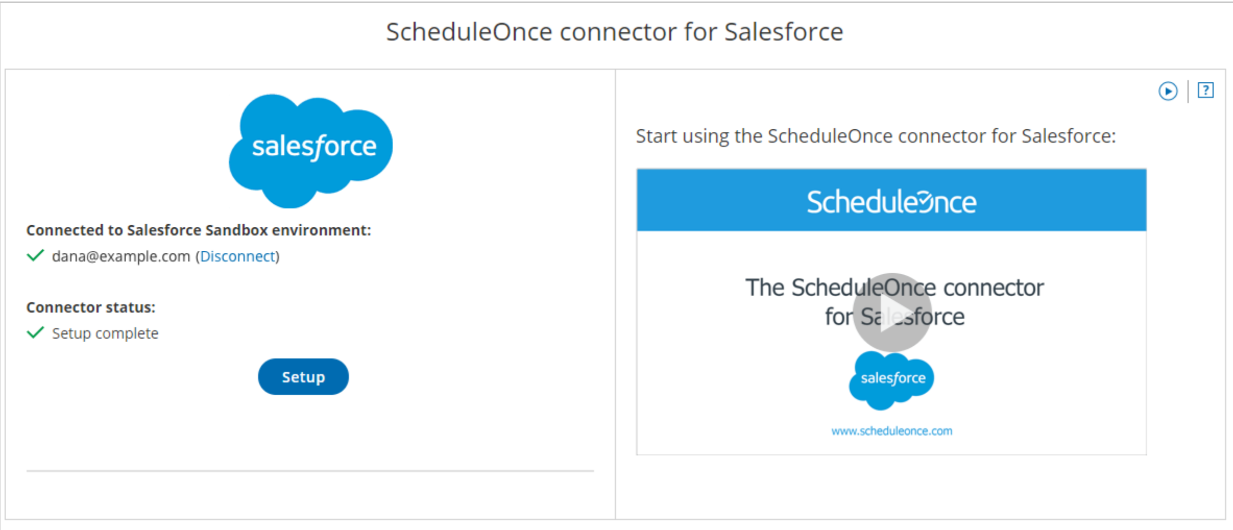


Figure 1: Connected to Salesforce

Congratulations! You can now enjoy the full benefits of Salesforce integration. Next, you should configure the Salesforce connector settings for Booking pages you own.

Configuring Salesforce connector settings on a Booking page

Last Modified on Oct 18, 2022

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.

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).

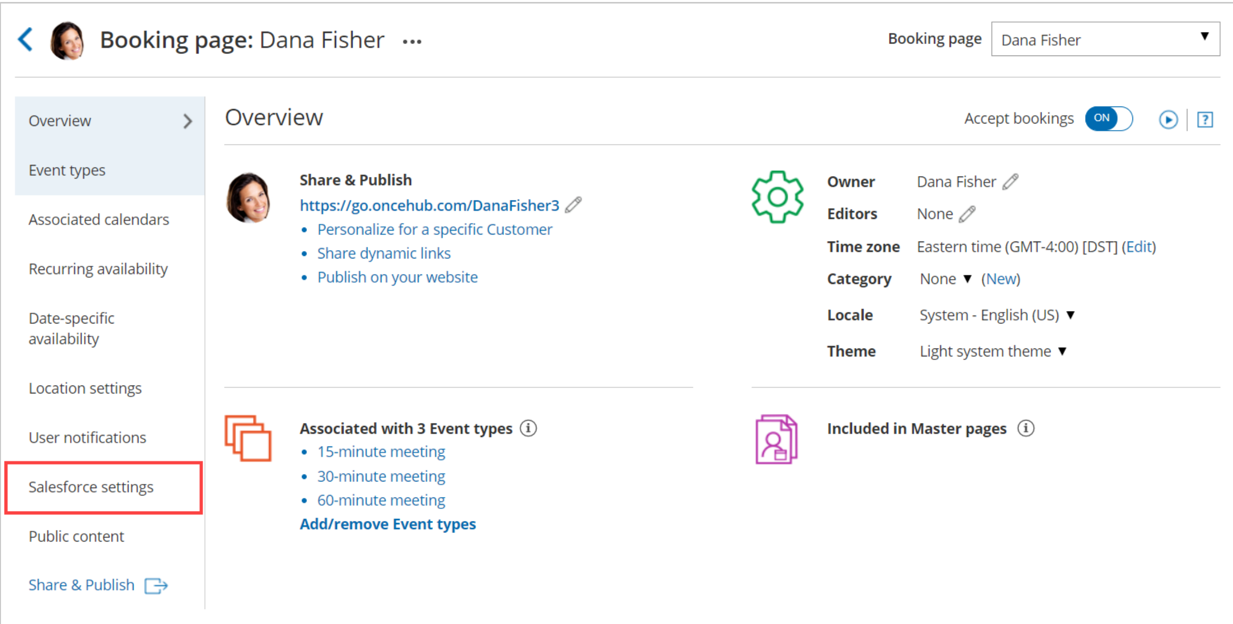


Figure 1: Salesforce settings on a Booking page

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.

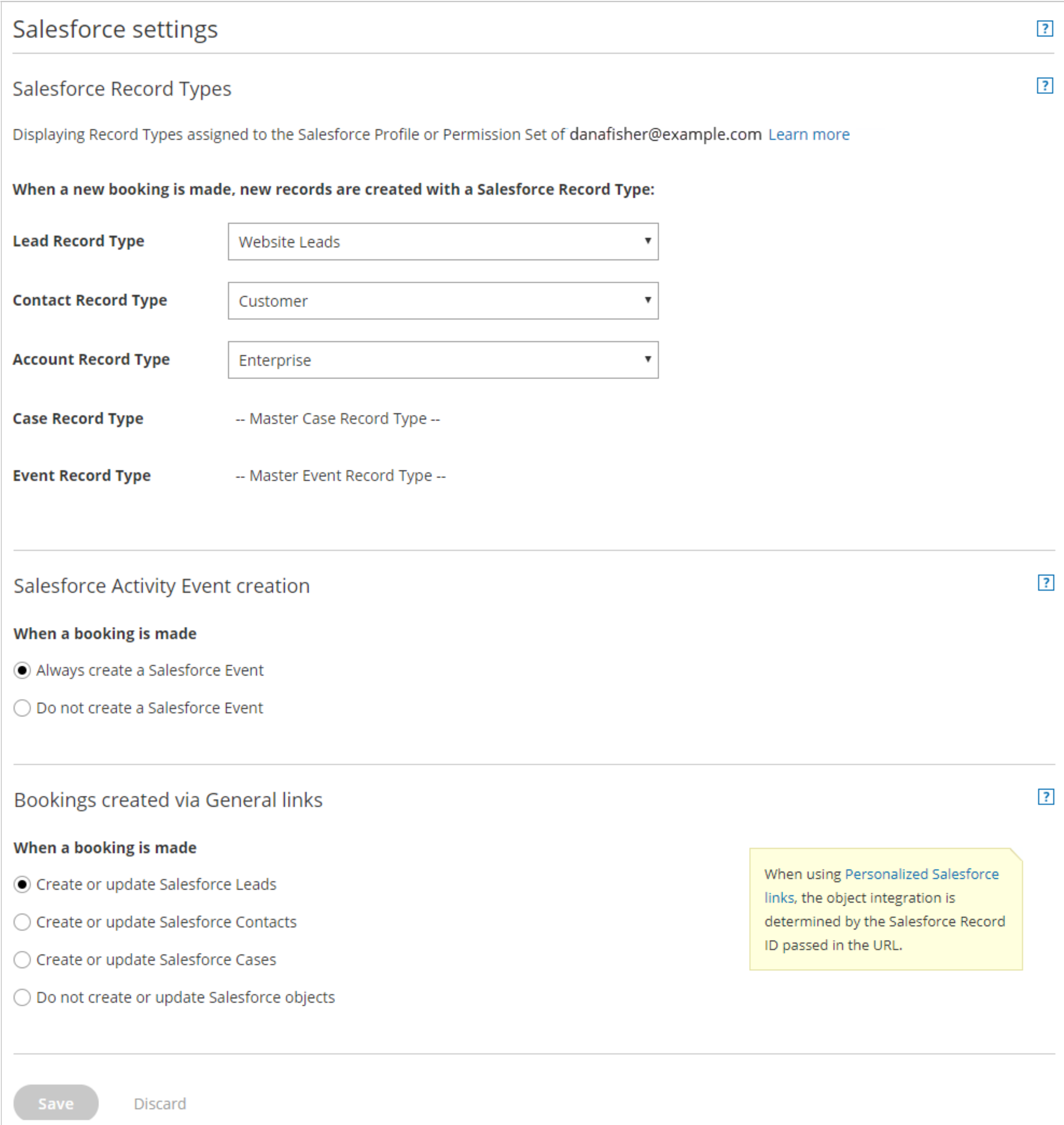


Figure 2: Salesforce settings

3. 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
4. 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.

Working with Salesforce Person Accounts

Last Modified on Oct 18, 2022

If you have chosen to set up Person Accounts in your Salesforce organization, you cannot work with the Standard Contact object. Instead, the Person Accounts record stores the information you'd typically save for business contacts, such as first name and last name. Person Accounts can be treated as a contact. Learn more about Salesforce Person Accounts

Currently, the OnceHub connector for Salesforce integrates with Person Accounts only when they already exist in your Salesforce Account. This means that the connector cannot be used to create new Person Accounts, but it can be used to update existing Person Account records.

Working with Person Accounts

To work with Person Accounts, you 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.

When scheduling with existing Person Accounts, you can use our Personalized links (Salesforce ID) in your Salesforce email templates or Salesforce emails to automatically recognize Customers based on the related Salesforce Contact Record ID.

Alternatively, you can use the Salesforce Record ID to personalize scheduling in your landing pages.

Working with Leads or Cases

When you use Person Accounts, you can still create or update Leads and Cases:

- **Booking page configured to work with Leads**: When a booking is made, a Salesforce Lead record is automatically created or updated and a Salesforce Event is added. If the Customer already exists as a Person Account in your Salesforce organization, the Person Account is updated and a Salesforce Event is added.
- **Booking page configured to work with Cases**: When a booking is made, a Salesforce Case record is automatically created or updated and a Salesforce Event is added. The existing Person Account is updated automatically and can be related to the Case record.

Salesforce Lightning Experience

Last Modified on Oct 18, 2022

The Salesforce Lightning Experience is the name for the all new Salesforce desktop app, with over 25 new features, built with a modern User interface and optimized for speed.

The OnceHub connector for Salesforce is *Lightning Ready* and enables complete scheduling integration through all phases of the Customer lifecycle. When a booking is made, a Salesforce Activity Event is created and related to a Salesforce Lead, Contact, Person Account, or Case record.

When you schedule with existing Salesforce Leads, Contacts, Person Accounts, or Case records, you can use our Personalized links (Salesforce ID) to automatically recognize Customers based on their Salesforce Record ID. These links can be added to your Customer emails or added to your organization's email templates.

- The Salesforce Lightning Experience supports email management and enables you to send email contacts, leads, and your own colleagues directly from your Person Account, Contact, Lead, or Case records.
- The Salesforce Lightning Experience supports email templates and includes the following features: rich text, merge fields, and attachments.

The Salesforce Lightning Experience also supports adding our Salesforce scheduling buttons to your Salesforce organization. Salesforce scheduling buttons provide quick method to schedule on behalf of a Customer. Bookings made via this button are automatically added to the Salesforce record that the booking is scheduled from.

Learn more about Salesforce scheduling buttons

How to connect a Salesforce API User

Last Modified on Oct 18, 2022

The Salesforce setup process includes 5 phases: API connection, Installation, Field validation, Field mapping, and Creation rules.

Since the OnceHub connector can create new standard records when a booking is made, it is critical that the permission to create new records always exists. For this reason, all API calls between OnceHub and Salesforce are made via a special API User that is granted the appropriate Permission Set. This ensures that new records can always be created, and at the same time, the permissions of individual Salesforce users are not altered.

You can also connect the OnceHub connector for Salesforce to a Salesforce Sandbox environment and keep your Salesforce connector setup when switching back to your production environment. Learn more about connecting to a Salesforce Sandbox environment

Important:

The API User does not need to be unique for OnceHub. If you already have an API User that is used to connect to a different third-party application, you can use that API User for the OnceHub connection.

In this article, you will learn how to connect OnceHub to an API User created in your Salesforce production account or in your Salesforce sandbox environment.

Requirements

To connect the API User to OnceHub, you must be:

- A OnceHub Administrator.
- A Salesforce Administrator for your organization.

You do not need an assigned product license to install and update Salesforce account settings. Learn more

The Salesforce API User

To connect to OnceHub, the Salesforce API User must have the following characteristics in your Salesforce account:

- The **User License** field must be **Salesforce**. The Salesforce User License is designed for Users who require full access to standard CRM and Force.com AppExchange apps. Users with this User License are entitled to access the OnceHub connector for Salesforce managed application.
- The **Profile** field must be **System Administrator.** The System Administrator profile must include the **API Enabled profile** permission and the **ModifyAllData** permission to ensure the access to the OnceHub connector for Salesforce connected app.

Connect to a Salesforce API User

Important :

You must sign out of Salesforce before proceeding so that the connection is using the API User created above. This ensures all communication between OnceHub and Salesforce is via the correct User.

1. Select your profile picture or initials in the top right-hand corner → **Profile settings** → **CRM**.
2. In the **Salesforce** box, click the **Setup** button (Figure 1).

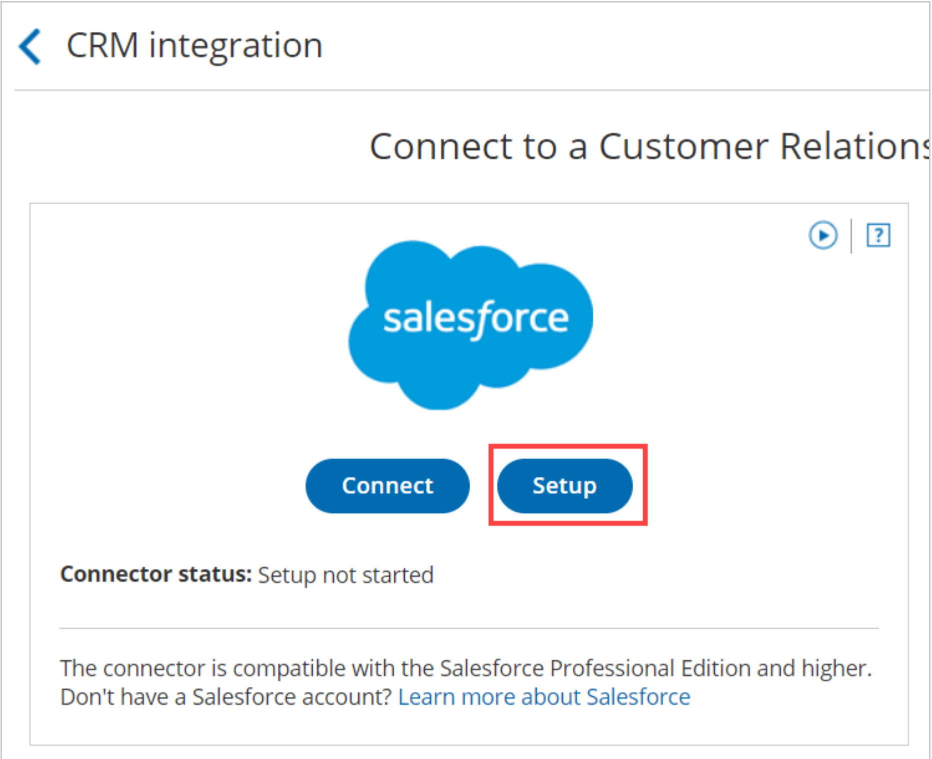


Figure 1: Set up API Connection in OnceHub

3. On the **API Connection** step, click **Connect an API User** to connect to an API User created in your Salesforce production environment (Figure 2).

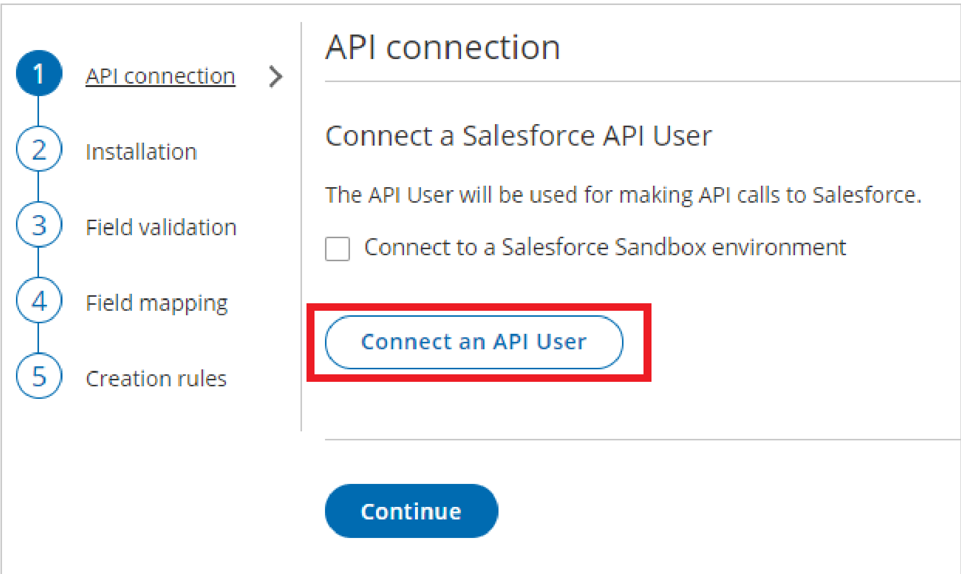


Figure 2: Connect an API User

4. If you're testing the connector in your Salesforce sandbox environment, you should check the **Connect to a Salesforce Sandbox environment** checkbox and connect to an API User created in your Salesforce Sandbox environment (Figure 3).

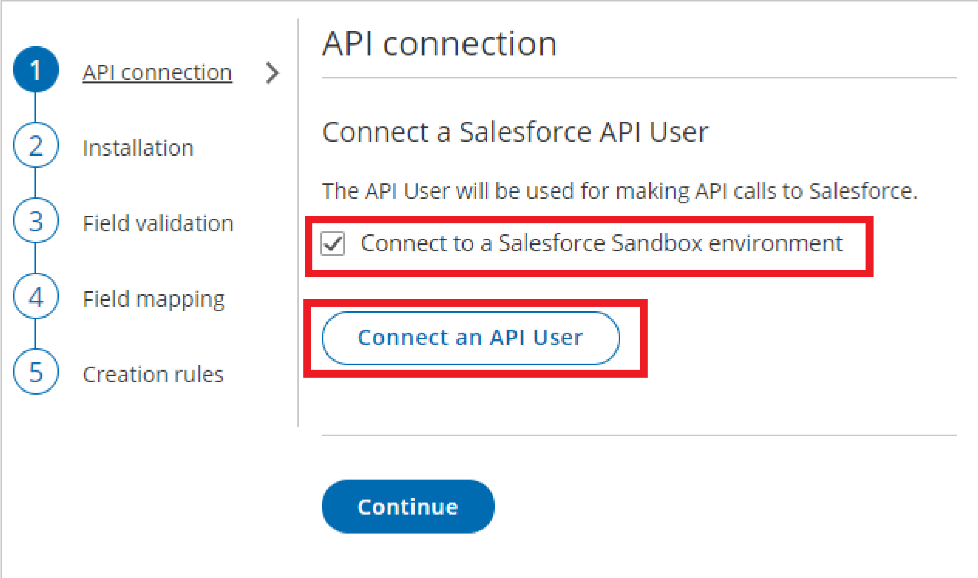


Figure 3. Connect to a Salesforce Sandbox environment

5. On the Salesforce sign-in page, enter the Username and Password of your **API User**.

> **Important:**
>
> If OnceHub automatically logged you to the wrong Salesforce User, you must disconnect and log out of Salesforce before trying to connect to the API User again.

6. On the **Allow Access** page, click **Allow** (Figure 4).
7. You are redirected back to OnceHub and the API User is now connected (Figure 5).

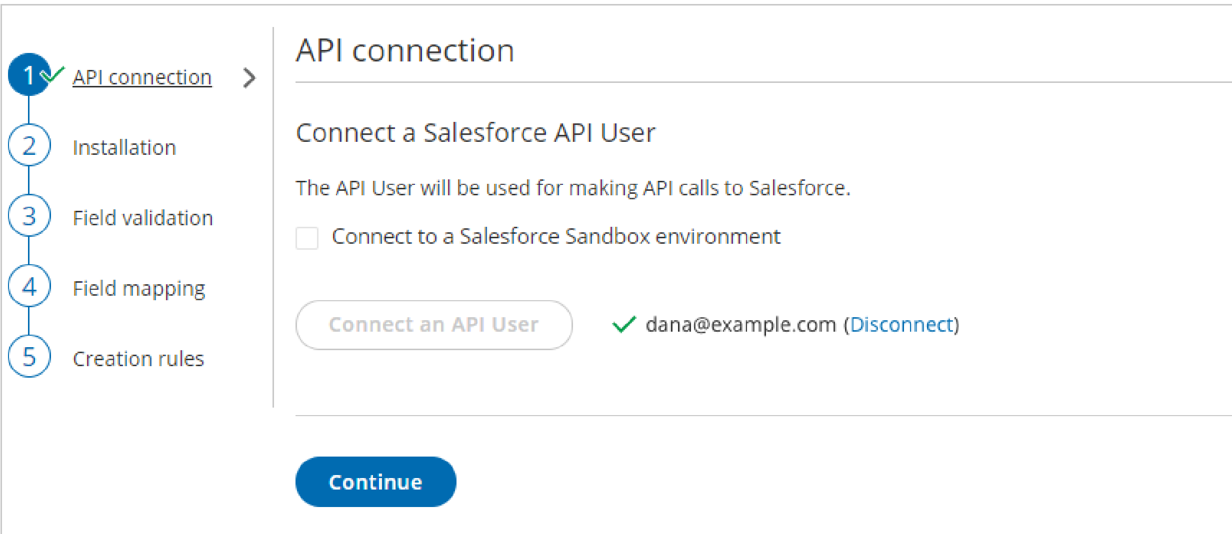


Figure 5: API User is connected

8. Click **Continue** to begin the installation.

Connecting OnceHub to a Salesforce Sandbox environment

Last Modified on Oct 18, 2022

A Salesforce Sandbox environment is a copy of your production environment. You can use a Salesforce Sandbox environment to test the OnceHub connector for Salesforce without compromising the data and applications in your production environment.

OnceHub enables you to connect to a Salesforce Sandbox environment and keep your Salesforce connector setup when you switch to your production environment.

In this article, you'll learn how to connect the OnceHub connector for Salesforce to your Salesforce Sandbox environment and how to switch to your production account after you finish testing.

Requirements

To connect OnceHub to a Sandbox environment, you must be:

- A OnceHub Administrator.
- A Salesforce Administrator for your organization.

You do not need an assigned product license to install and update Salesforce account settings. Learn more

The Salesforce API User

To connect to OnceHub, the Salesforce API User must have the following characteristics in your Salesforce Sandbox environment:

- The **User License** field must be **Salesforce**. The Salesforce User License is designed for Users who require full access to standard CRM and Force.com AppExchange apps. Users with this User License are entitled to access the OnceHub connector for Salesforce managed application.
- The **Profile** field must be **System Administrator.** The System Administrator profile must include the **API Enabled profile** permission and the **ModifyAllData** permission to ensure the access to the OnceHub connector for Salesforce connected app.

Connecting to the Salesforce Sandbox environment

Important:

If OnceHub automatically logged you to your Salesforce production environment, you must disconnect and log out of Salesforce before trying to connect to the API User again.

1. Select your profile picture or initials in the top right-hand corner → Profile settings → **CRM**.
2. In the **Salesforce** box, click the **Setup** button (Figure 1).

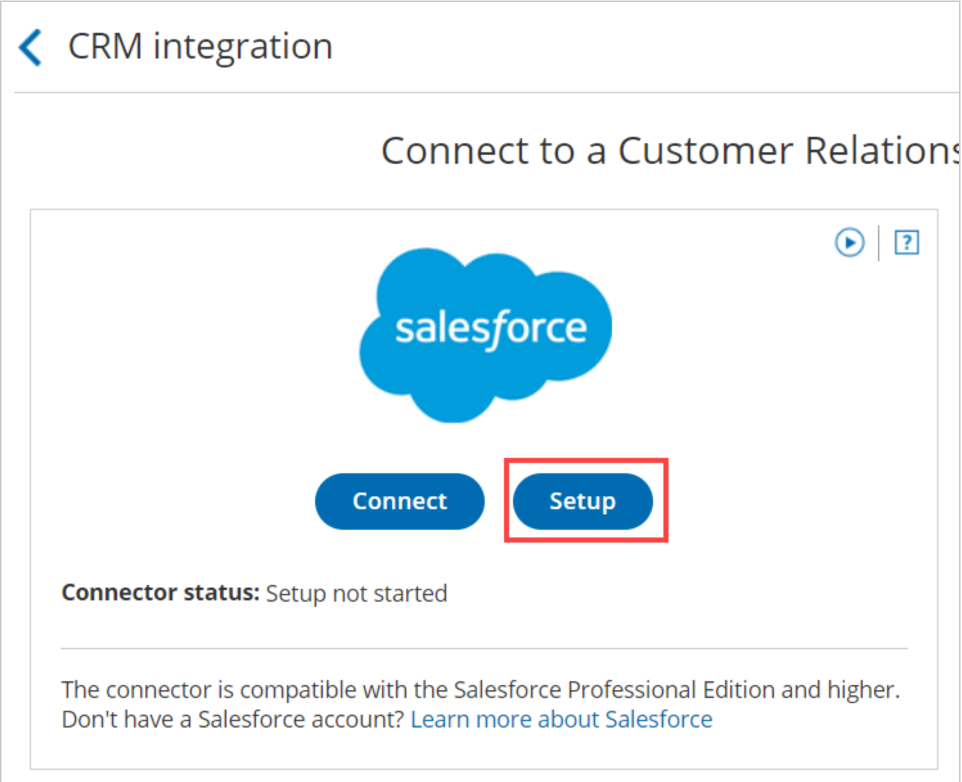


Figure 1: Set up API Connection in OnceHub

3. On the **API connection** tab, check the **Connect to a Salesforce Sandbox environment** checkbox and connect to an API User created in your Salesforce Sandbox environment (Figure 2). Learn more about connecting to the API User

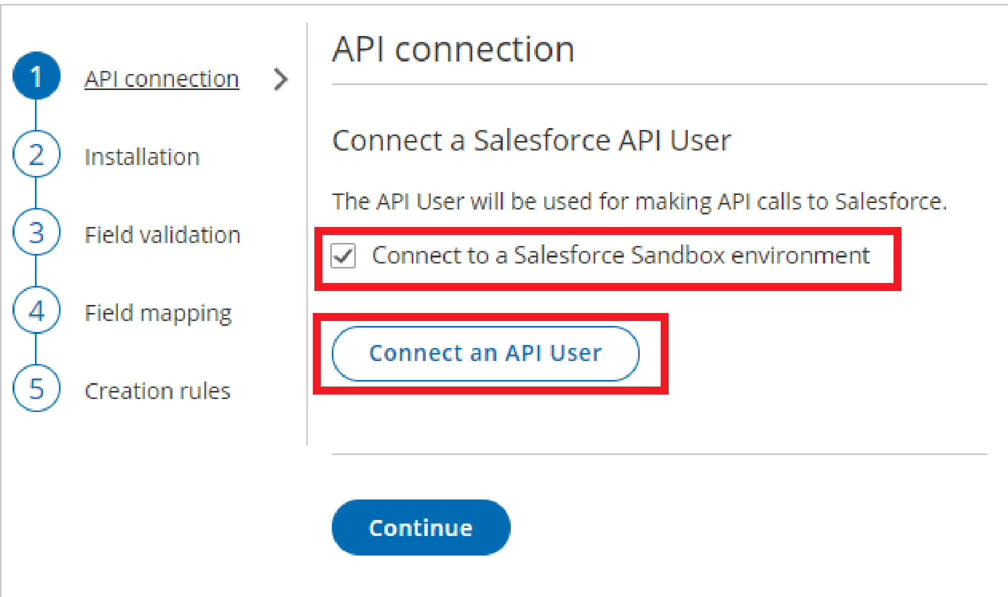


Figure 2: Connect to a Salesforce Sandbox environment

Once connected, you can proceed with the next steps in the Salesforce connector setup process:

- Install the connector in your Sandbox environment
- Assign the OnceHub permission set to the API User
- Add Custom fields to the Activity Event layout

- Map OnceHub fields to universally required Salesforce fields
- Map OnceHub fields to non-mandatory Salesforce fields
- Configure the Salesforce record creation, update and assignment rules

Once the setup completed, you can test the OnceHub connector for Salesforce in your Salesforce Sandbox environment.

Switching from a Salesforce Sandbox environment to a Production Account

When you're ready to switch to your production environment, you must disconnect the API User from your Salesforce Sandbox environment and connect to your production environment.

1. Select your profile picture or initials in the top right-hand corner → Profile settings → **CRM**.
2. In the **Salesforce** box, click the **Setup** button.
3. On the **API Connection** tab, click **Disconnect**.
   After disconnecting OnceHub from your Salesforce Sandbox environment, all Users connected to the Salesforce Sandbox will be disconnected automatically and won't be able to accept bookings.
4. On the **API connection** tab, uncheck the **Connect to a Salesforce Sandbox environment** checkbox and connect to an API User created in your Salesforce production environment. Learn more about connecting to the API User

   > **Important:**
   >
   > If OnceHub automatically signed you in to your Salesforce Sandbox environment, you must disconnect and sign out of Salesforce before trying to connect to the API User again.

Once connected, you can proceed with the setup:

- Install the connector in your production environment.
- Assign the OnceHub permission set to the API User.
- Add Custom fields to the Activity Event layout.
- Map OnceHub fields to universally required Salesforce fields.
- Map OnceHub fields to non-mandatory Salesforce fields.
- Configure the Salesforce record creation, update, and assignment rules.

> **Important:**
>
> If the Salesforce Sandbox is a mirror of your production environment, your OnceHub setup will be kept when you switch to your production environment. However, you must complete the OnceHub connector for Salesforce setup to be able to accept bookings in your production environment.

You're done! Now you need to ask Users to connect to their Salesforce production account to integrate with Salesforce.

How to install the OnceHub connector for Salesforce

Last Modified on Oct 18, 2022

The Salesforce setup process includes 5 phases: API connection, Installation, Field validation, Field mapping, and Creation rules.

Installation is a three step process. In this article, you will learn about the first step: installing the OnceHub connector package in Salesforce. The OnceHub connector for Salesforce is installed directly from OnceHub.

Requirements

To install the connector from OnceHub, you must:

- Be a OnceHub Administrator.
- Be a Salesforce Administrator in your organization.
- Have an active connection to your Salesforce API User.

You do not need an assigned product license to install and update Salesforce account settings. Learn more

Installing the OnceHub connector for Salesforce

1. Select your profile picture or initials in the top right-hand corner → **Profile settings** → **CRM**.
2. In the **Salesforce** box, click the **Setup** button (Figure 1).

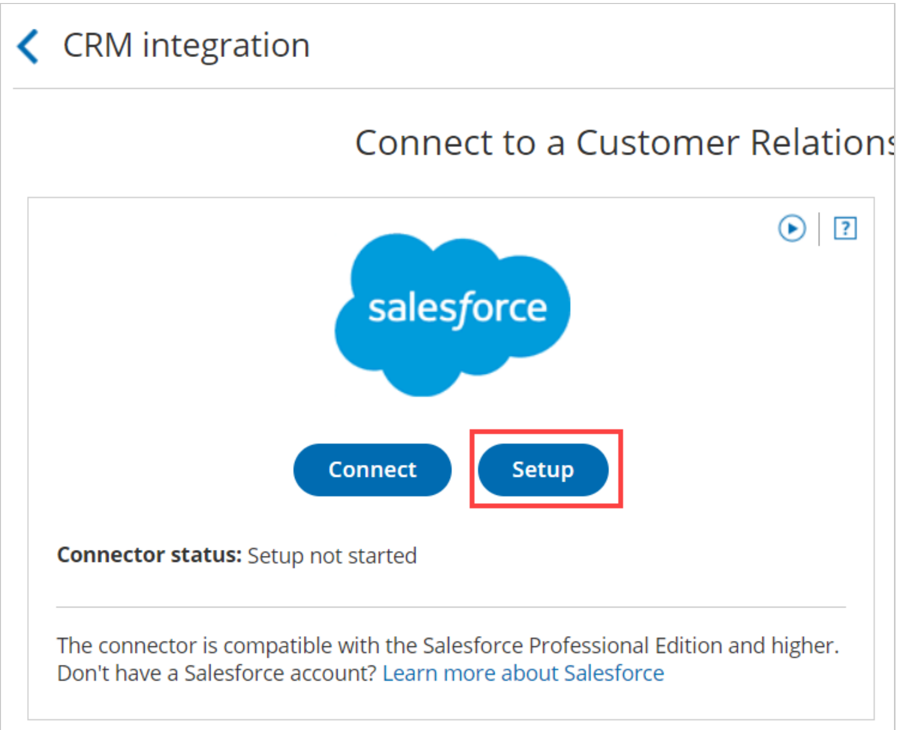


Figure 1: Set up API Connection in OnceHub

3. On the **Installation** tab, click the **Install connector** button (Figure 2).

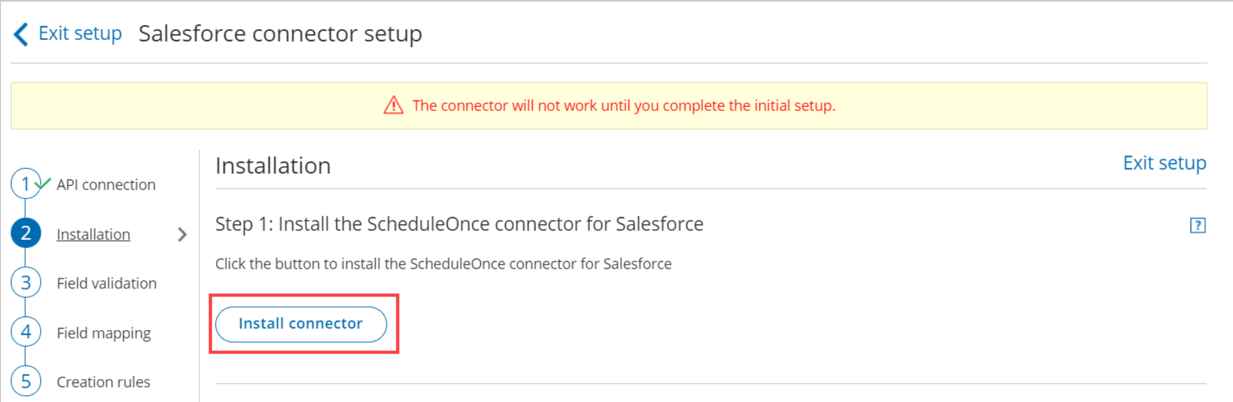


Figure 2: Install connector

4. Sign in to Salesforce.
5. On the **Salesforce** Install Package landing page, select **Install for All Users** and then click the **Install** button (Figure 3).

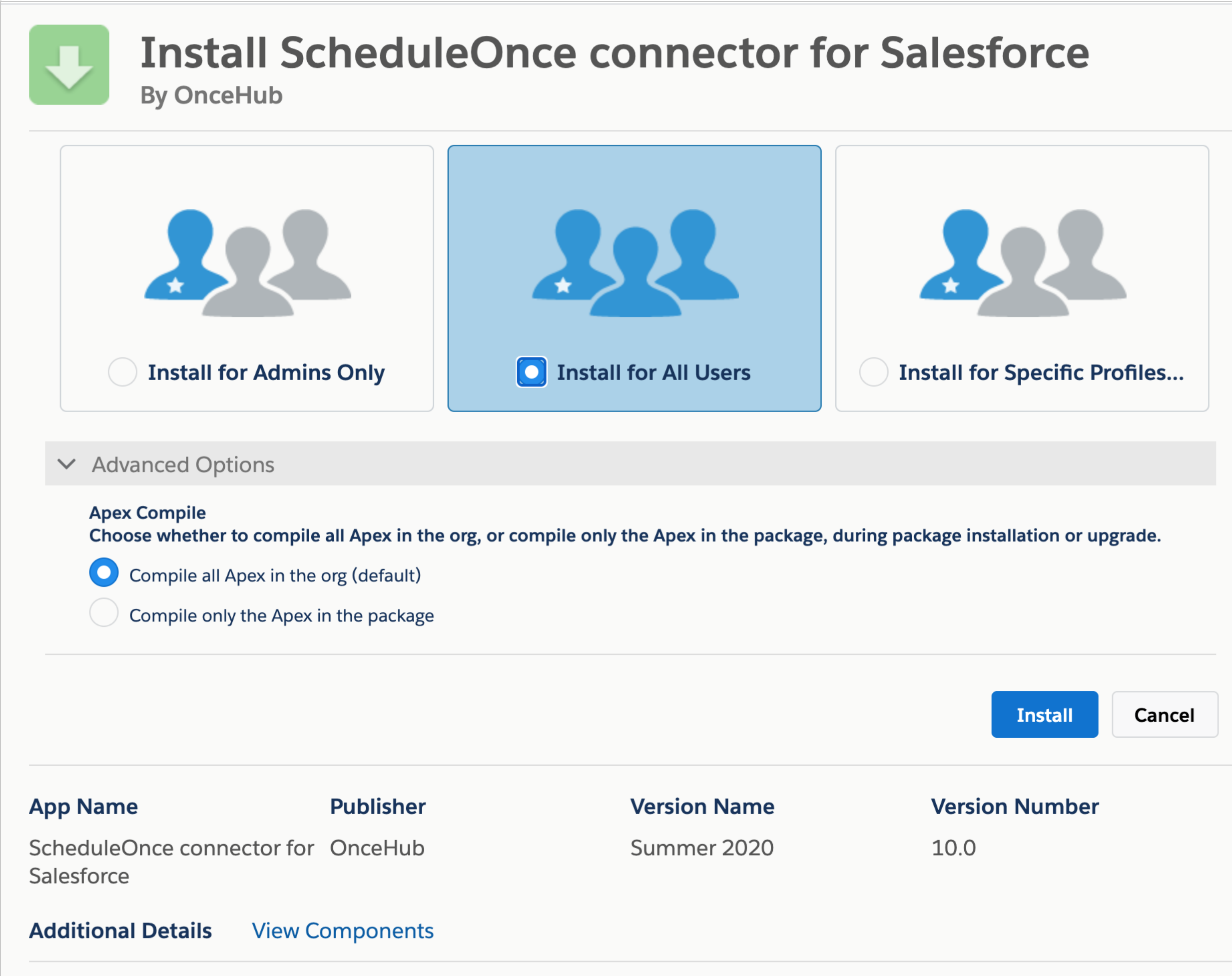


Figure 3: Install for All Users

6. Once installation is complete, click the **Done** button.
7. Return to OnceHub and reload the page, then go back to the **Installation** tab. You will see that the connector is now installed (Figure 4).

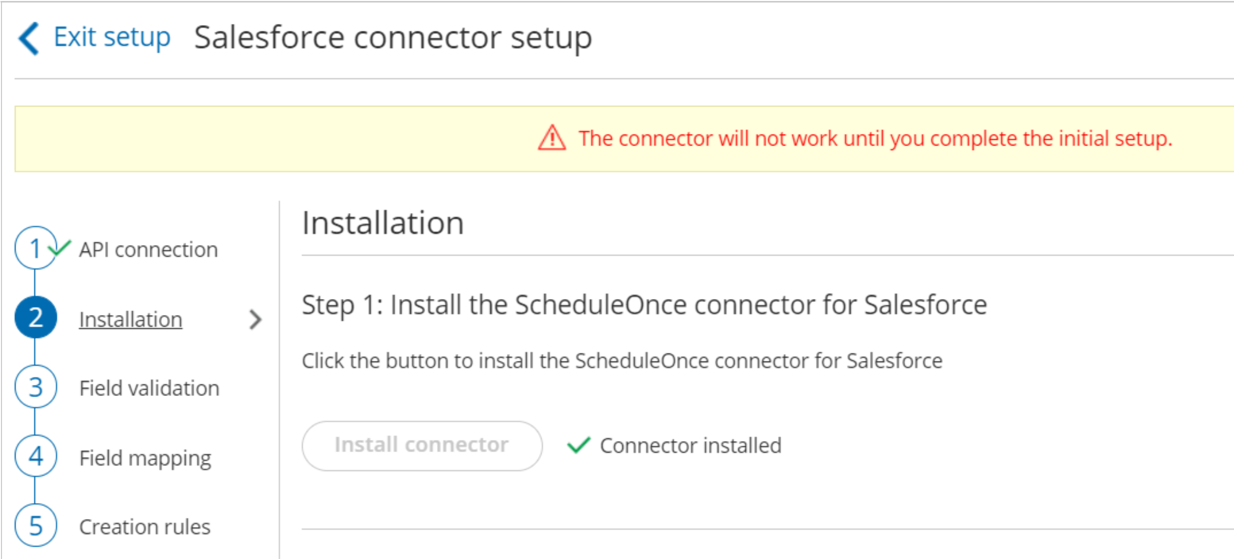


Figure 4: Connector installed

Note:

After the connector is installed, it can take up to 10 minutes before **Connector installed** is shown on the **Installation** tab.

That's it! You've completed **Step 1** of the Installation process. Now you can proceed to **Step 2**, which is described in the How to assign the OnceHub permission set to the Salesforce API User article.

How to assign the OnceHub permission set to the Salesforce API user

Last Modified on Oct 18, 2022

The Salesforce setup process includes 5 phases: API connection, Installation, Field validation, Field mapping, and Creation rules.

In this article, you'll learn how to assign the OnceHub Permission Set to the API User in Salesforce.

Permission sets

Permission Sets in Salesforce define what functions and features your Users have access to in Salesforce. To use the OnceHub connector for Salesforce, you must assign the appropriate Permission Set to your API User.

The OnceHub Permission Set assigns permissions to work with Lead, Contact, Case, Account, and Activity records. This will allow the OnceHub connector to create and update records through the API User.

Requirements

To assign the OnceHub permission set, you will need:

- A Salesforce Administrator for your organization.
- An installed OnceHub connector for Salesforce.

Assigning the OnceHub permission Set

1. Sign in to Salesforce as your API User.
2. Go to the **Setup** page.
3. In the **Administration** section, go to **Users -> Permission Sets** (Figure 1).

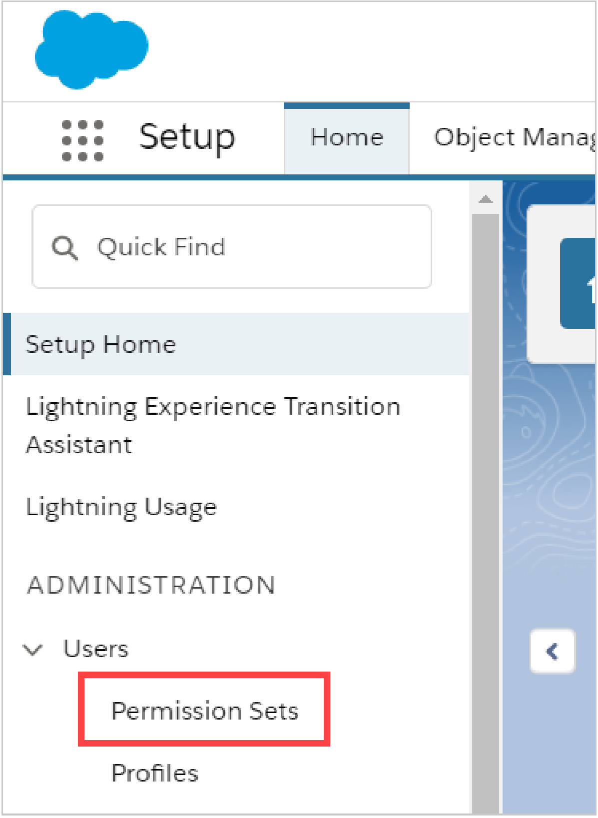


Figure 1: Permission Sets in the Users menu

4. In the **Permission Sets** pane, click **OnceHub connector for Salesforce permission set** (Figure 2).

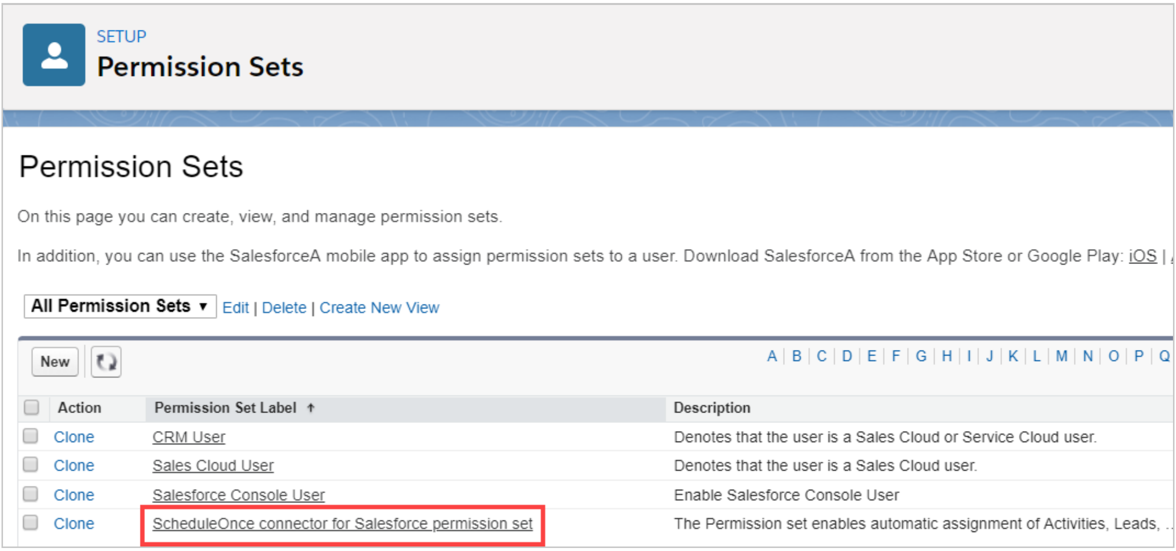


Figure 2: OnceHub connector for Salesforce permission set

5. On the **OnceHub connector for Salesforce** permission set page, click the **Manage Assignments** button (Figure 3).

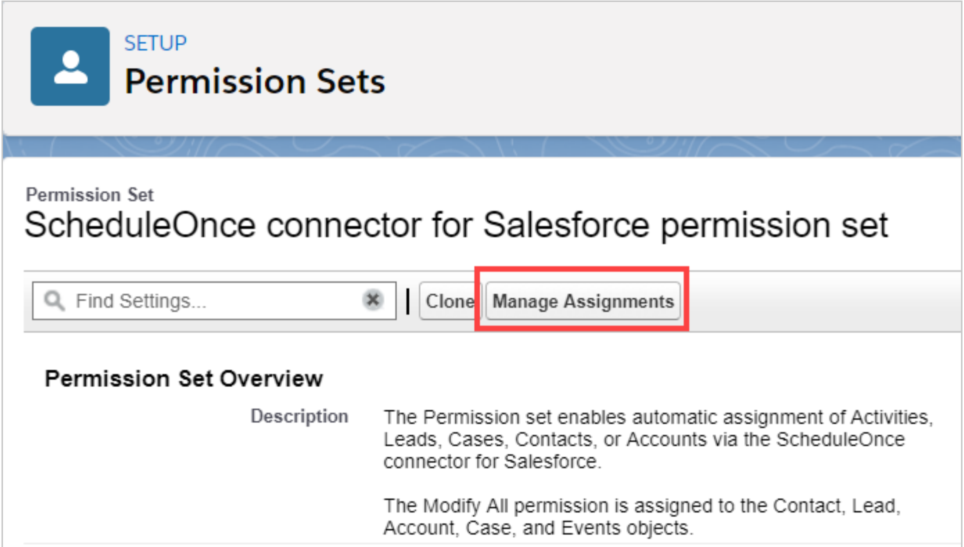


Figure 3: Manage Assignments

6. On the **Assigned Users** page, click the **Add Assignments** button (Figure 4).

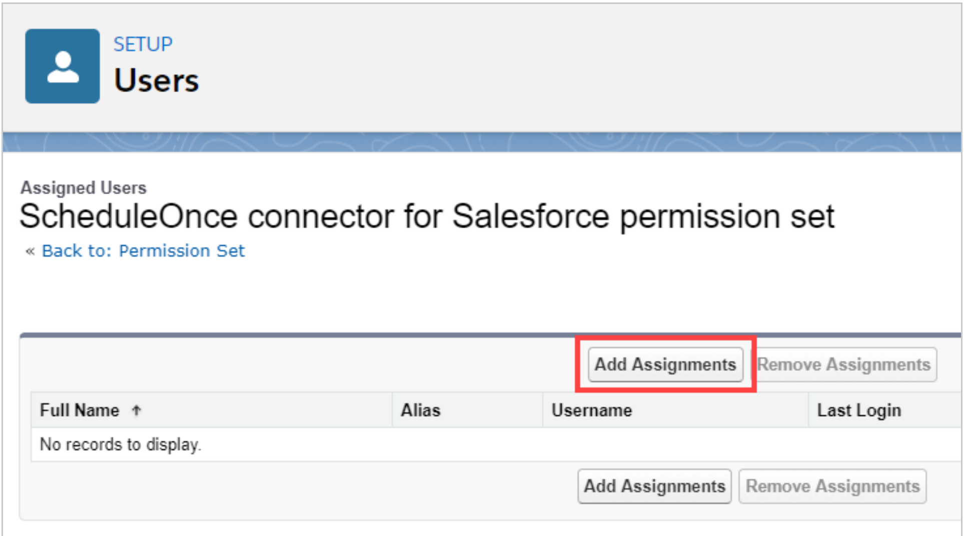


Figure 4: Add Assignments

7. In the **All Users** list, check the box next to your API User and click **Assign** (Figure 5).

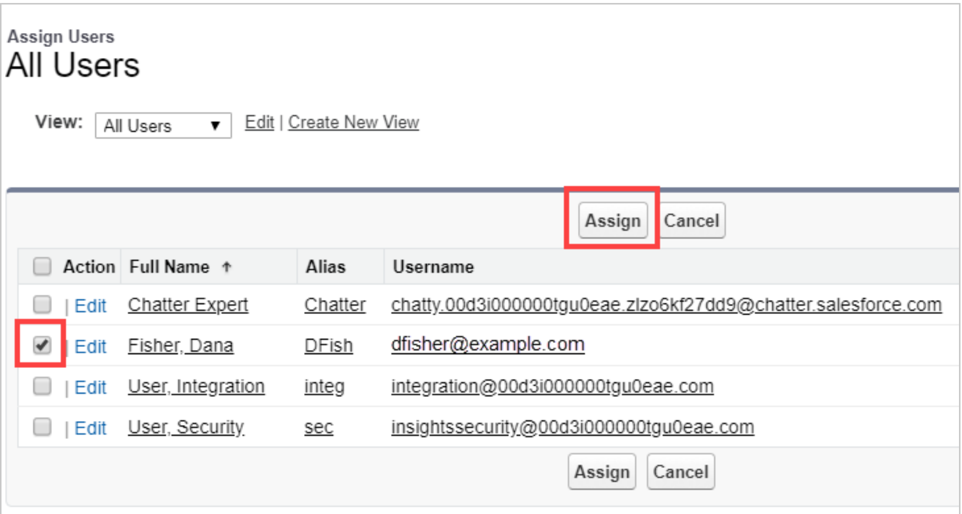


Figure 5: Assign API user

8. Click **Done**.
9. Go back to the Salesforce setup page in OnceHub.
10. After you refresh the page, the **Installation** tab will now be updated to show that you have completed **Step 2: Assign OnceHub Permission set**.

> **Important:**
>
> The API User must be connected to OnceHub for the page to update correctly. Learn more about connecting the Salesforce API User

That's it! You've completed **Step 2** of the **Installation** process. You can now proceed to **Step 3**, which is described in the Adding Custom fields to the Salesforce Activity Event layout article.

How to customize the API User's Profile when working in advanced secure mode

Last Modified on Jun 2, 2023

When you are working in advanced secure mode, you do not need to use the OnceHub permission set and can control the permissions assigned to the connected API User. In this case, you must ensure that the API User's assigned profile has the necessary permissions that allow the connector to create and assign records.

In this article, you will learn how to customize the API User's profile for the OnceHub connector for Salesforce.

Requirements

To customize the API User's profile, you will need

- A Salesforce Administrator for your organization
- A Salesforce API User

The Salesforce API User

To connect to OnceHub, the Salesforce API User's User License must be **Salesforce**. The Salesforce User license is designed for users who require full access to standard CRM and Force.com AppExchange apps. Users with this user license are entitled to access the OnceHub connector for Salesforce managed application.

Customizing the API User's profile

1. Log into your Salesforce organization as an Administrator
2. Under **Setup**, go to **Users > Profiles**
3. Create or update the Profile associated with the API User.
4. Click **Edit** to set the security permissions.
5. Under the **Record Type** Settings section, make sure that you assign the Record types that connected Salesforce Users should have access.
6. Under the Administrative Permissions section, make sure the API Enabled box is checked
7. Under the **General User Permissions** section, make sure the **Edit Events** box is checked
8. Under the **Standard Object Permissions** section, make sure that Read, Create, Edit, and Delete permissions are checked for:
   - Lead
   - Accounts
   - Contacts
   - Events
   - Case
9. When finished, click Save at the bottom of the page.

Congratulations! The API User's profile is updated with the appropriate permissions for the connector to create and assign records in Salesforce.

Adding Custom fields to the Salesforce Activity Event Page Layout

Last Modified on Apr 10, 2023

The Salesforce setup process includes 5 phases: API connection, Installation, Field validation, Field mapping, and Creation rules.

In this article, you'll learn how to add the **Event status** and the **Cancel/reschedule reason** fields to the Activity Event Page Layout in Salesforce.

Salesforce Activity Events

When a booking is made, a Salesforce Activity Event is always created and related to a Salesforce Lead, Contact, or Case record. The creation of the Activity Event is only the first step in the booking lifecycle. After the Activity Event is created, it is continuously updated through all phases of the booking lifecycle: **Scheduled**, **Rescheduled**, **Completed**, **Canceled**, or **No-show**. Learn more about activity statuses

The **Event status** and the **Cancel/reschedule reason** fields are provided with the OnceHub connector for Salesforce and are mapped to OnceHub data. When these fields are added to the Event Page Layout, they are used for updating the Activity Event with any change in the booking lifecycle.

- **Event status:** This field indicates the current phase of the booking in the booking lifecycle: **Scheduled**, **Rescheduled**, **Completed**, **Canceled**, or **No-show**.
- **Cancel/reschedule reason:** This field adds additional information to the **Canceled** and **Rescheduled** lifecycle phases by providing the reason given by the Customer or Booking owner when a booking is canceled or rescheduled.

Salesforce provides a simple WYSIWYG editor (What You See Is What You Get) to customize the Event Page Layout.

You can drag and drop new elements onto the page, or drag existing page elements around to change the layout to suit your preferences.

Requirements

To add the **Event status** and the **Cancel/reschedule reason** fields to the Activity Event layout in Salesforce, you will need:

- A Salesforce Administrator for your organization.
- An installed OnceHub connector for Salesforce.

Adding Custom fields to Activity Event Page Layout in Salesforce

1. Sign in to Salesforce as your API user.
2. Go to the **Setup** page.
3. In the **Platform Tools** section, go to **Objects and Fields -> Object Manager** (Figure 1).

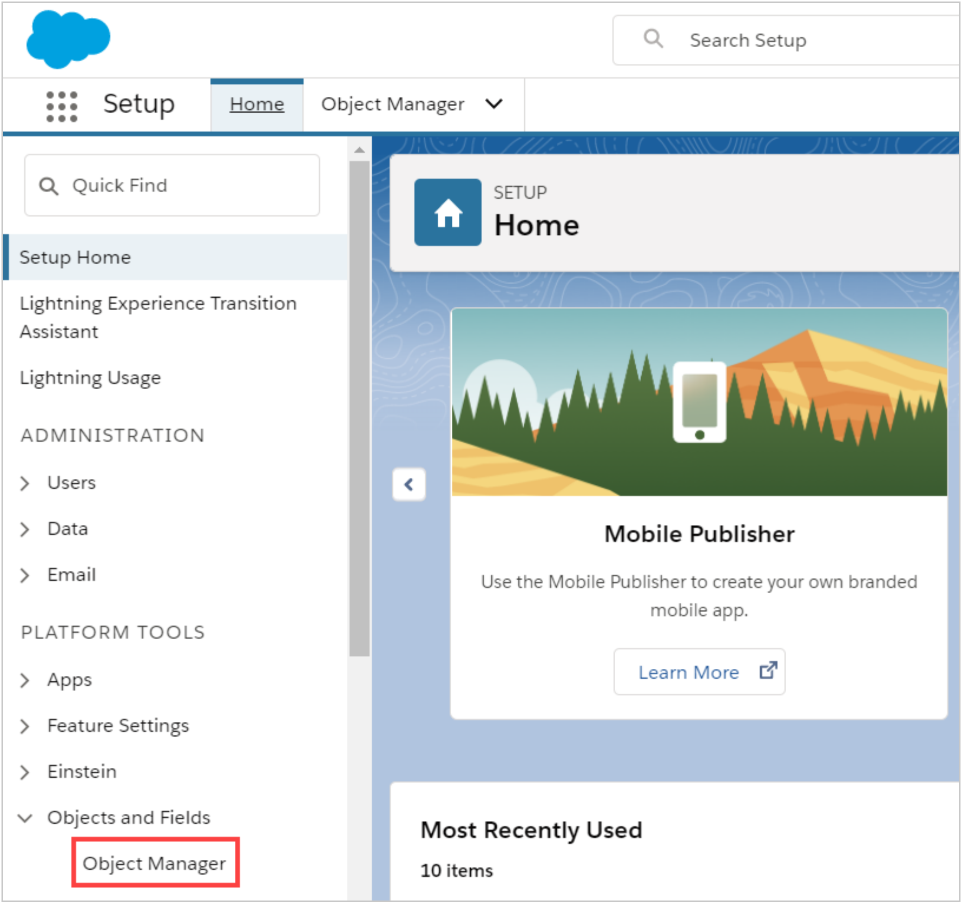


Figure 1: Object Manager in the Objects and Fields menu

4. In the **Object Manager** list, select **Event** (Figure 2).

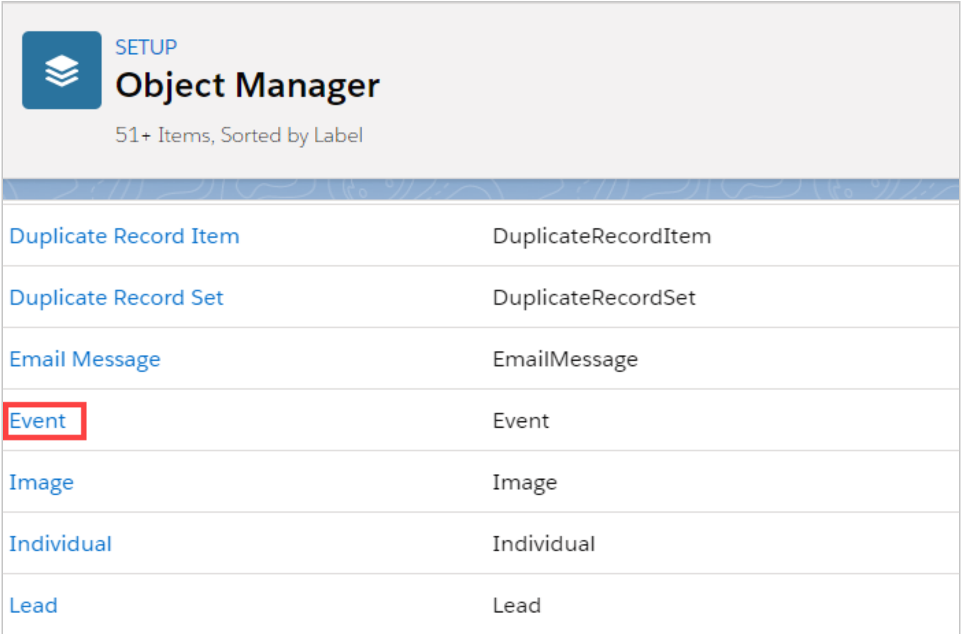


Figure 2: Event in the Object Manager list

5. On the **Event** page, select **Page Layouts -> Event Layout** (Figure 3).

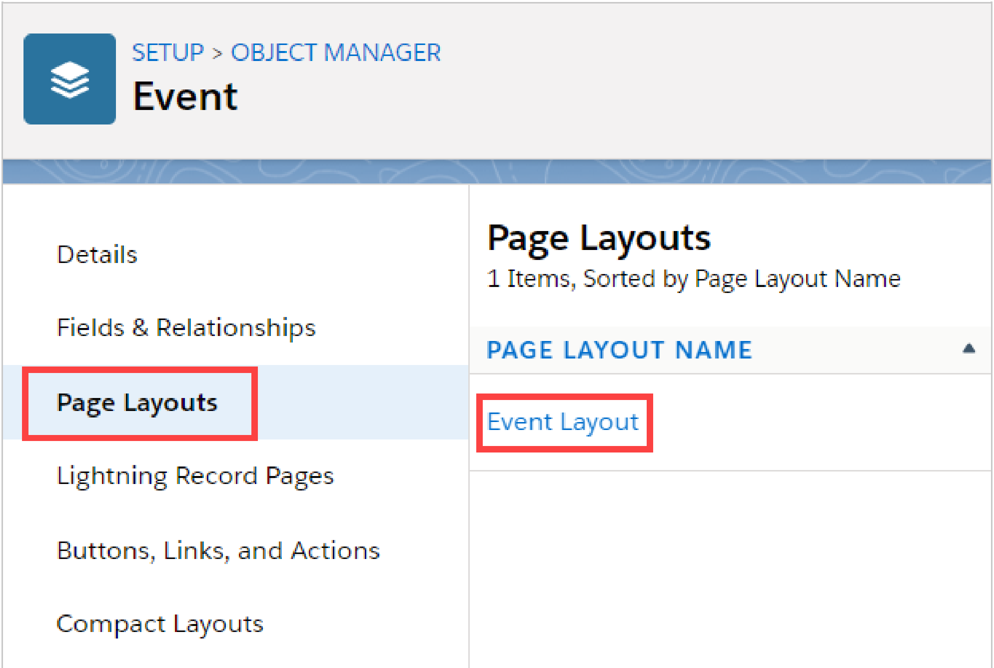


Figure 3: Event layout

6. Drag the **Section** element from the Editor menu and drop it below the **Calendar Details** section (Figure 4) to create a new section for the OnceHub fields that you want to add.

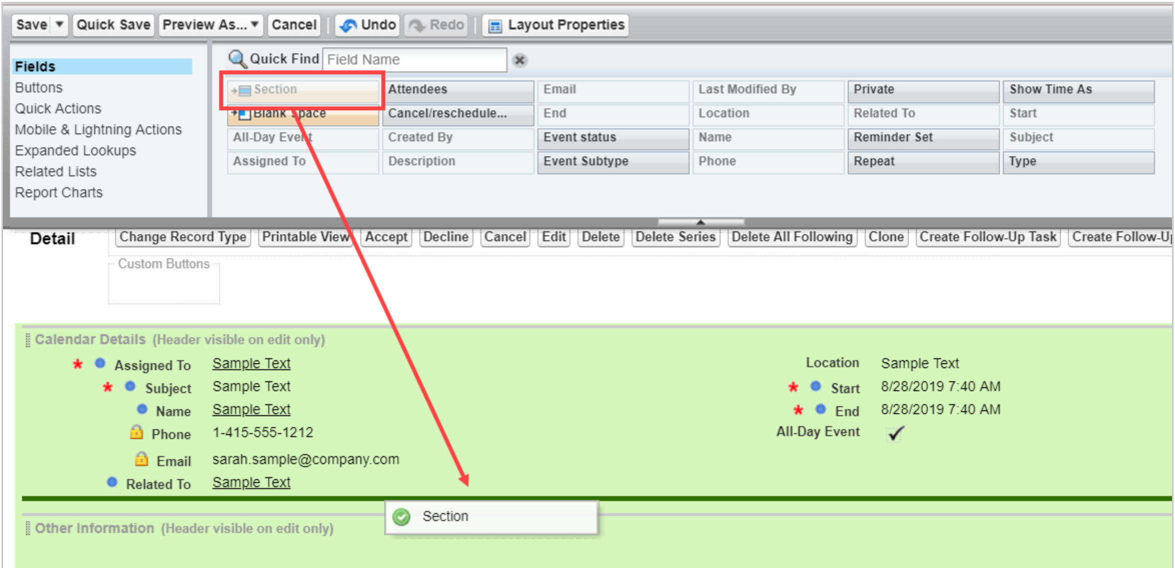


Figure 4: Add a new section

7. In the **Section Properties** pop-up, enter a **Section Name** and click **OK** (Figure 5).

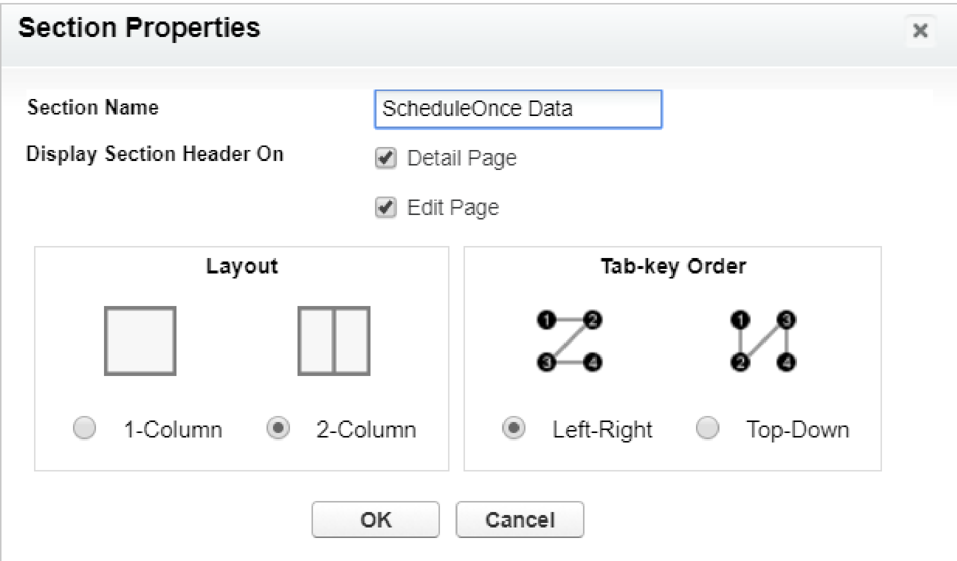


Figure 5: Section Properties pop-up

8. Click and drag the **Cancel/reschedule reason** element and drop it in the new section. Do the same with the **Event status** element (Figure 6).

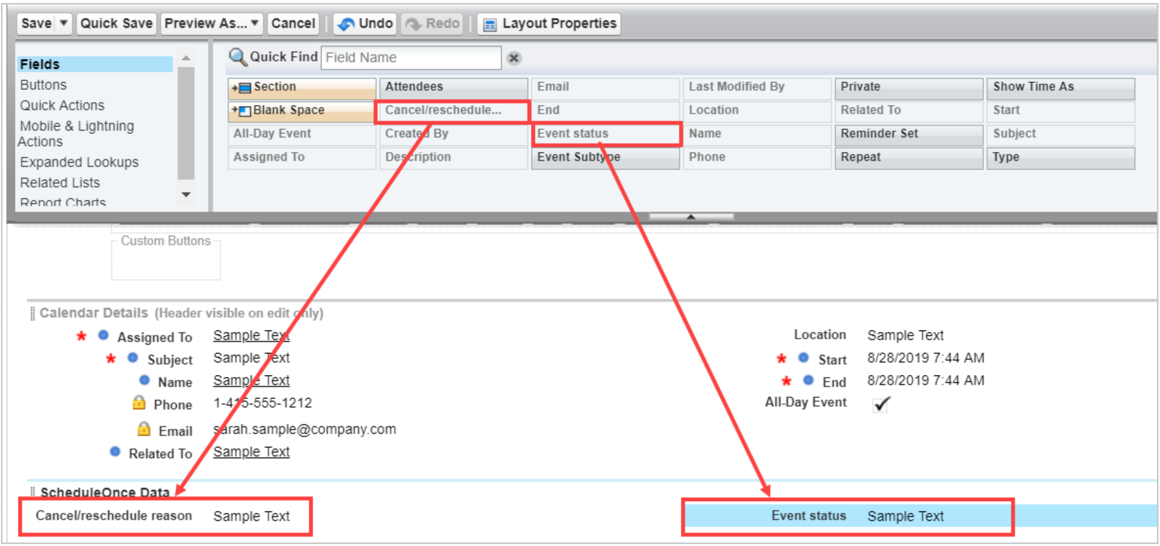


Figure 6: Add elements to new section

9. Click **Save**.
10. Go back to the Salesforce setup page in OnceHub.
11. After you refresh the page, the **Installation** tab will now be updated to show that you have completed **Step 3: Add Custom fields to the Event page layout** (Figure 7).

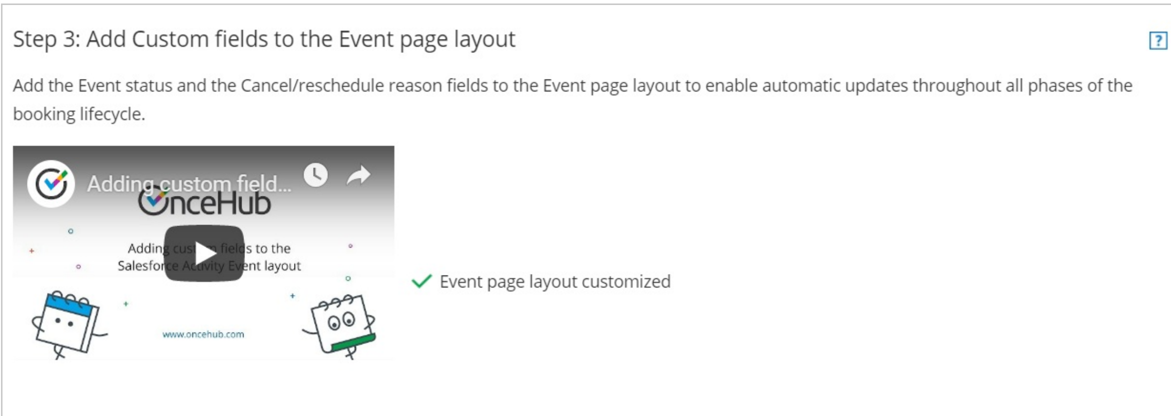


Figure 7: Event page layout customized

Important:

The API User must be connected to OnceHub for the page to update correctly. Learn more about connecting the Salesforce API User

That's it! You've completed **Step 3** of the Installation phase. You can now click **Continue** to start mapping OnceHub fields to universally required Salesforce fields.

Handling required Salesforce fields in the Field validation step

Last Modified on Jun 2, 2023

The Field validation mapping step in the Salesforce connector setup process includes all Salesforce universally required fields that do not have a default value for the five standard objects in your Salesforce account: Lead, Contact, Account, Event, and Case.

These fields require a value in order to allow the creation of a new record. The role of the Field validation mapping step is to ensure that the appropriate value is made available for bookings created via the OnceHub Salesforce integration.

In this article, you'll learn about handing required Salesforce fields in the Field validation step.

Default values for universally required fields

We recommend that you always set a default value for universally required fields in your Salesforce organization. Once done, these fields will be removed from the Field validation mapping step of the Salesforce connector setup wizard.

When a booking is made and a required field in Salesforce has not been mapped to a field in OnceHub, a Field validation error will be detected. OnceHub will pass a default value to the field in Salesforce. The default values that will be passed are shown in the table below:

Custom field type	Default value
Currency	$0.00
Date	Current date
Date/Time	Current time
Email	email@example.com
Geolocation	0.000000, 0.000000
Number	0
Percent	0%
Phone	1234567890
Text, Text area, Text area (Long), Text area (Rich)	Unspecified
URL	http://NA

To fix this Field validation error, you should update the Field validation mapping of the Salesforce connector setup wizard. You only need to fix the fields that create validation errors on the affected Booking page.

Important:

It is recommended that you make test bookings when you handle Salesforce universally required fields in the Field validation mapping step to ensure that you have resolved all validation errors affecting your Booking pages. Note that you can do this test after each change you make in the Field validation mapping step. There is no need to complete the setup process.

Field types in the Field validation mapping step

The Field validation mapping step handles two types of fields: those that are supported by the integration and those that are not supported.

Supported Salesforce fields

In the Field validation mapping step of the Salesforce connector setup wizard, you will see all universally required fields that require a value. This value can be supplied by either a OnceHub field, a static value, or an existing Salesforce value. This will ensure that a value is always associated with the required field when a new record is created.

Non-supported Salesforce fields

In the Field validation mapping step of the Salesforce connector setup wizard, you will see all universally required fields that are not supported by the integration. Since the integration does not support these fields, you have no choice but to make these universally required fields non-mandatory for the affected Booking pages.

If you still want these fields to be mandatory, you can set them as required on the Page Layout. This will make the fields required for manual entry but not for the API. Once done, they will be removed from the Field validation mapping step of the Salesforce connector setup process.

Requirements

To handle supported and non-supported Salesforce universally required fields, you will need:

- A OnceHub Administrator.
- An active connection to your Salesforce API User.
- A Salesforce Administrator.

Handling supported Salesforce universally required fields

1. In the **Salesforce connector setup**, go to the **Field validation** tab (Figure 1).

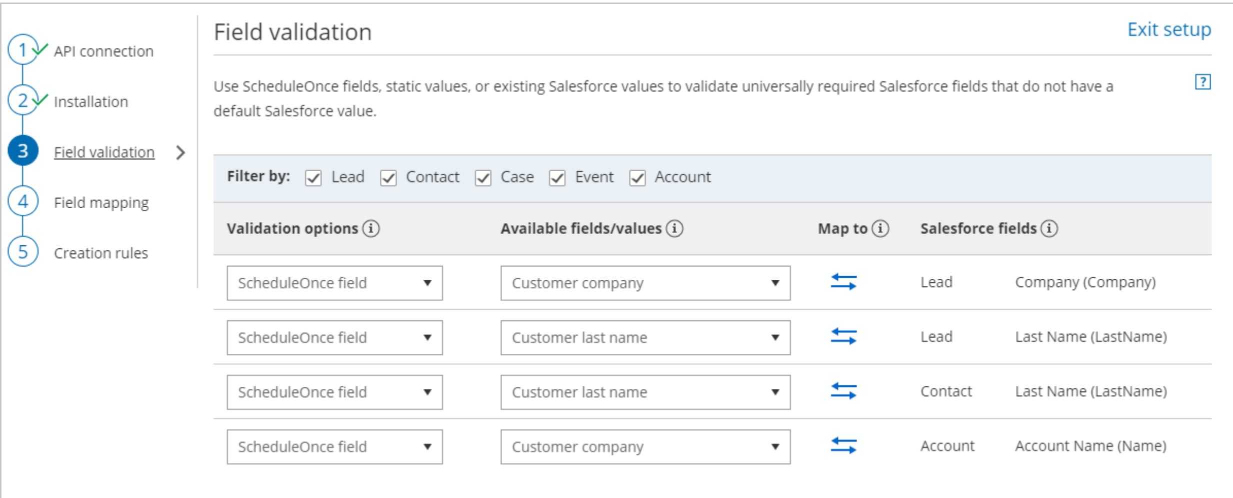


Figure 1. Validation field mapping.

2. In the **Validation options** column, select an option. You have three options that are relevant only for supported

Salesforce field types:

- **A OnceHub field:** This list includes over 40 System fields and all Custom fields in your OnceHub account.

> **Important:**
>
> OnceHub fields requiring Customer input must be set as mandatory fields on the Booking form. Otherwise, these fields will automatically be added to the Booking form at the time of the booking and you will not have control over the order in which added fields are displayed to the Customer. Especially notable is the **Your company** OnceHub field, which must be added manually to your booking forms in order to map to the **Company** field in Salesforce.
>
> Learn more about editing Booking forms
>
> Learn more about adding Custom fields to the Booking form

- **A Static value:** This option maps a default text or date value to the Salesforce field.
- **An existing Salesforce value**: This list retrieves the pick list values from your Salesforce account.

3. In the **Available fields/values** column, select the relevant OnceHub field, assign an existing Salesforce value, or type a static value.

> **Note:**
>
> There is a two-way mapping between Salesforce and OnceHub. For this reason, you can only map one OnceHub field to one Salesforce field.
>
> **From OnceHub to Salesforce**
> When a booking is made, all data is mapped from OnceHub to Salesforce.
>
> **From Salesforce to OnceHub**
> When scheduling with existing Salesforce records using Personalized links (Salesforce ID), Customer data is mapped from Salesforce to OnceHub in order to prepopulate or skip the Booking form.

4. Click the **Save** button or **Save and Continue** if you have completed mapping all required fields.

Handling non-supported Salesforce universally required fields

To handle non-supported Salesforce universally required fields, you need to identify which non-supported fields are blocking the integration.

1. In the **Salesforce connector setup**, go to the **Field validation** tab.
2. Review the list of non-supported Salesforce universally required fields and define which standard Objects Users connected to Salesforce will be creating new records for.
3. Sign in to Salesforce as an administrator.
4. In your Salesforce Setup page, go to **Object and Fields -> Object Manager**.
5. Select the Object that you want to edit.
6. Select **Fields & Relationships**.
7. Select the non-supported Salesforce field you have identified earlier.
8. Click **Edit**.
9. Under **General Options**, ensure that is it not set as **Required**.
10. Return to OnceHub and refresh the page. The **Field validation** tab is now updated and the non-supported field will

have disappeared.

> **Important:**
>
> The API User must be connected to OnceHub for the page to refresh correctly.

If you still want these fields to be mandatory for manual entry, you can set them as required on the Page Layout. This will make the fields required for manual entry but not for the API.

1. In Salesforce, go to **Setup**.
2. In your Salesforce Setup page, go to **Object and Fields -> Object Manager**.
3. Select the Object that you want to edit.
4. Select **Page Layout** page and choose the Page Layout you want to edit.
5. On the **Page Layout editor**, double click the Custom field and check the checkbox to mark it as **Required**.
6. Click **OK**.
7. When you have completed your edits, click the **Save** button.

Mapping OnceHub fields to non-mandatory Salesforce fields

Last Modified on Oct 18, 2022

The Salesforce setup process includes 5 phases: API connection, Installation, Field validation, Field mapping, and Creation rules. The **Field mapping** step includes a default mapping and the option to map any OnceHub fields to non-mandatory Salesforce fields.

In this article, you will learn how to map OnceHub fields to non-mandatory Salesforce fields.

Requirements

To map non-mandatory fields, you must:

- Be a OnceHub administrator.
- Have an active connection to your Salesforce API User.

Default mapping

Some OnceHub fields are mapped to non-mandatory Salesforce fields by default. We recommend keeping the mapping as is and not removing mapped data from the integration. This will enable you to gather the basic Customer data and booking data in Salesforce.

Other OnceHub fields can be mapped to additional non-mandatory Salesforce fields. You can remove them from the mapping by unchecking each field.

> **Important:**
>
> The default mapping includes mapping for all objects supported by the Salesforce integration: Lead, Contact, Event, Account, and Cases. However, not all fields will always be in use. This depends on your booking activity and the Booking pages used.

Adding new OnceHub fields

You can add OnceHub fields and map them to non-mandatory Salesforce fields. This allows you to map data tracked in OnceHub to Lead, Contact, Case, Account, or Event records.

You cannot map OnceHub fields to Salesforce universally required Custom fields. Required fields must be mapped in the Field validation mapping step.

> **Important:**
>
> OnceHub fields requiring Customer input must be added to the Booking form. Otherwise, the field will be automatically added to the Booking form at the time of the booking and you will not have control over its location in the form. Learn more about adding Custom fields to the Booking form

To add a OnceHub field and map to a Salesforce field, follow these steps:

1. In the **Salesforce connector setup**, go to the **Field Mapping** tab.
2. At the bottom left of the table, click the **Add OnceHub fields** button.
3. The **Add OnceHub fields** pop-up will open (Figure 2). You can see the list of OnceHub System fields and Custom fields with corresponding field types that can be mapped to Salesforce field types.

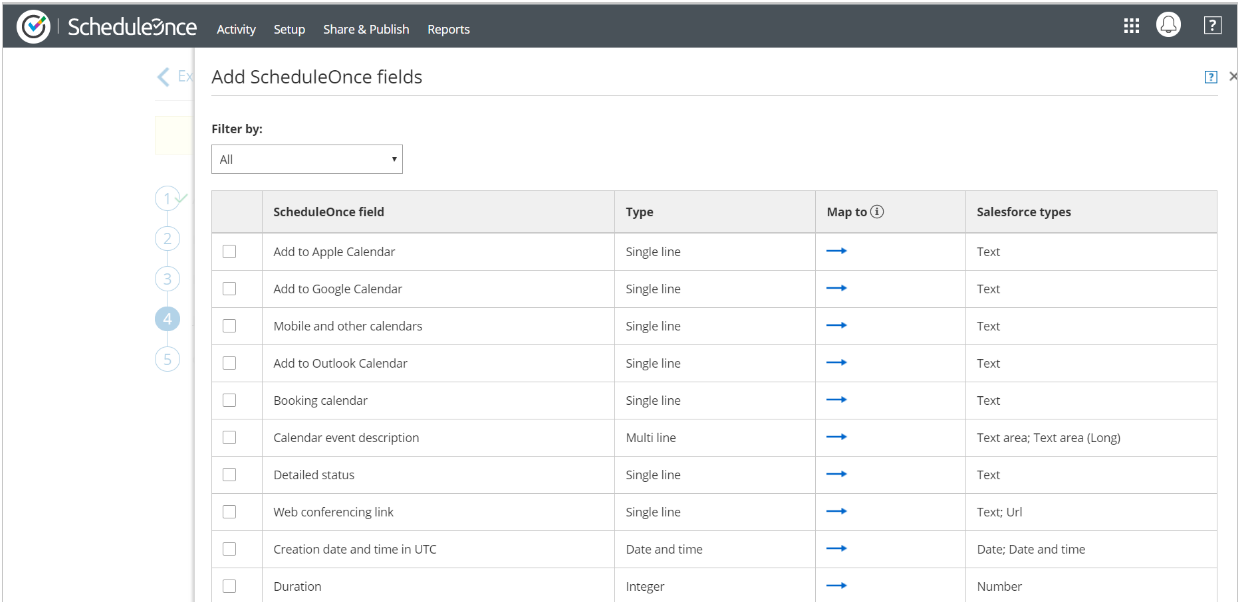


Figure 1: Add OnceHub fields pop-up

The Salesforce fields include all the fields stored in Salesforce (Custom and Standard fields) that are supported by the mapping for the selected OnceHub field. Learn more about the supported and non-supported Salesforce field types.

Note:

There is a two-way mapping between Salesforce and OnceHub. For this reason, you can only map one OnceHub field to one Salesforce field.

From OnceHub to Salesforce:
When a booking is made, all data is mapped from OnceHub to Salesforce.

From Salesforce to OnceHub:
When scheduling with existing Salesforce records using Personalized links (Salesforce ID), Customer data is mapped from Salesforce to OnceHub in order to prepopulate or skip the Booking form.

4. Use the **Filter by** drop-down menu to select a category if required.
5. Check the box next to each field you would like to add.
6. Click **Add fields**.
7. Click **Save**, or **Save and Continue** if you have completed mapping all fields.

Deleting a mapped field

1. In the **OnceHub fields** list, click the delete icon beside the added field you want to delete (Figure 3).
2. In the **Remove OnceHub field** pop-up, click **Yes**.
3. Click **Save**.

Using Salesforce Workflow Rules to update fields based on OnceHub data

Last Modified on Apr 5, 2023

The OnceHub connector for Salesforce allows you to map any OnceHub System field or Custom field to Salesforce fields. If you want to add an additional layer of Salesforce fields update logic, you can create Salesforce Workflow Rules.

In this article, you'll learn how to create Workflow Rules based on OnceHub data. We'll use a sample scenario in which you update the **Lead: Event Booked checkbox** and the **Lead: Lead Status picklist** when a Customer makes a booking or reschedules a booking.

Requirements

To update Salesforce fields when the Customer schedules or reschedules an event, you will need:

- A OnceHub Administrator.
- A Salesforce Administrator for your organization.
- An active connection to your Salesforce API User.

Let’s assume that the Lead Status field includes the **Working – Contacted** and the **Open – Not contacted** options. To create the Salesforce Workflow Rules, you'll need to follow these steps:

- Create an **Event Status** text Custom field for the Lead object and add it to the Lead Page Layout.
- Create an **Event Booked** checkbox Custom field (unchecked as default) for the Lead object and add it to the Lead Page Layout.
- Map the OnceHub **Status** field to the Lead: Event Status field.
- Create the Workflow Rules.

Creating an Event Status text Custom field

1. Sign in to Salesforce as your API user.
2. Go to the **Setup** page.
3. In the **Platform Tools** section, go to **Objects and Fields -> Object Manager** (Figure 1).

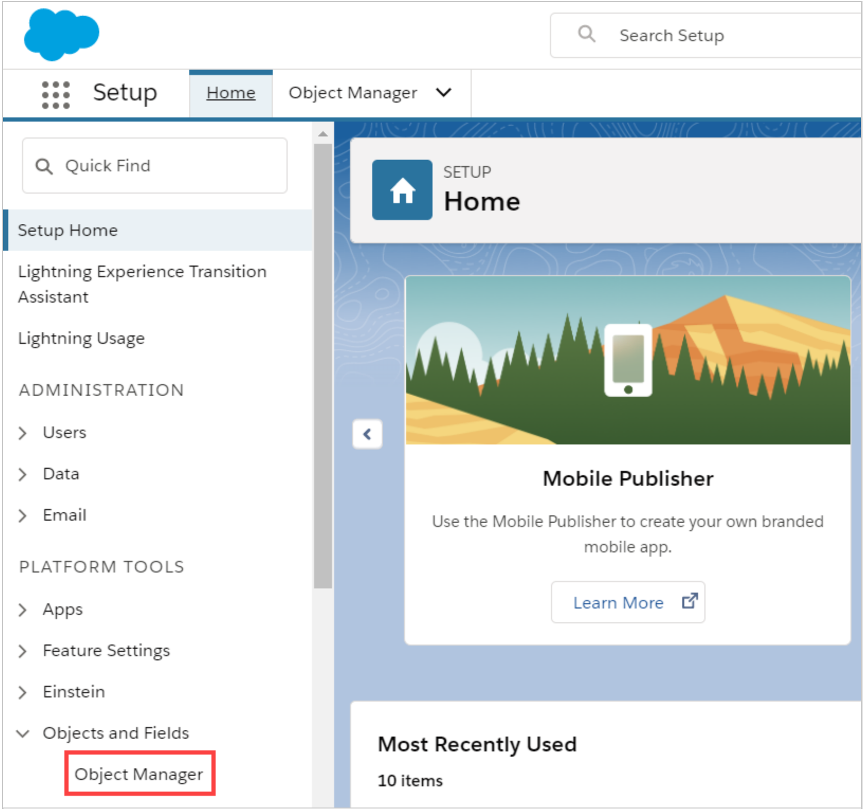


Figure 1: Object Manager in the Objects and Fields menu

4. In the **Object Manager** list, select **Lead** (Figure 2).

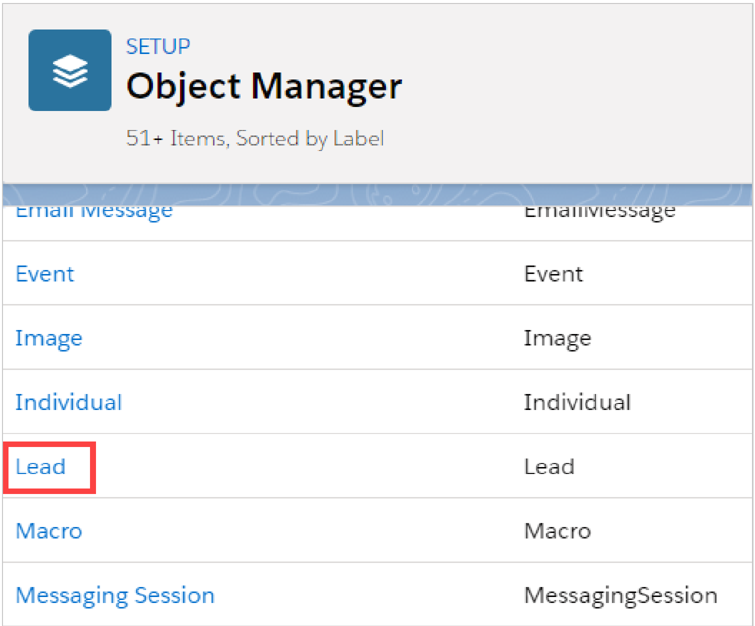


Figure 2: Lead in the Object Manager list

5. Select **Field & Relationships -> New** (Figure 3).

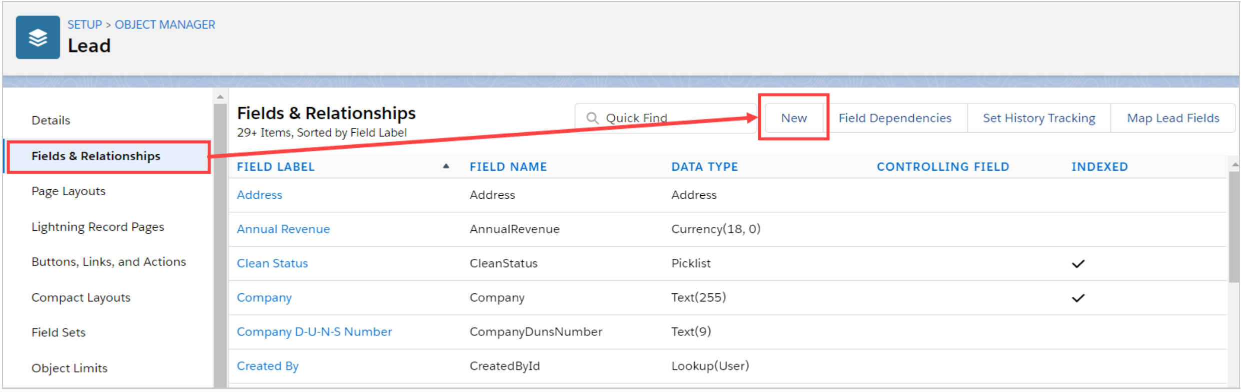


Figure 3: Fields & Relationships

6. In the **New Custom Field** pane, select **Text** and click **Next** (Figure 4).

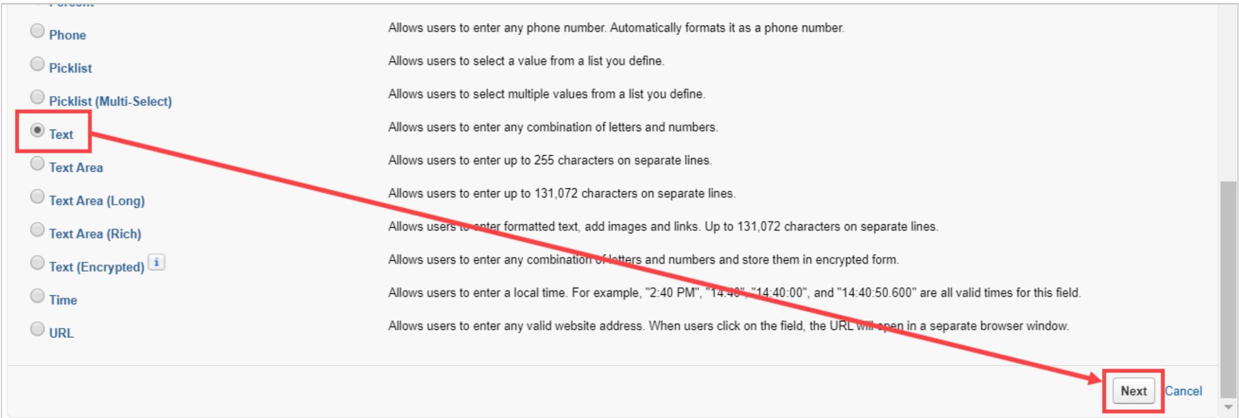


Figure 4: Text field

7. In **Step 2: Enter the details**, enter the following information (Figure 5). Add a description if required, then click **Next**.

- **Field label:** Event Status
- **Length:** 40
- **Field Name:** Event_Status

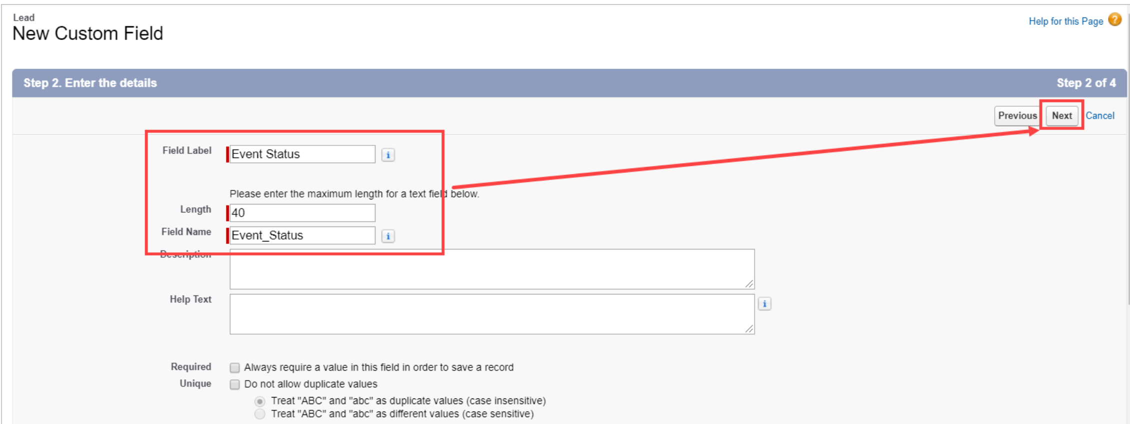


Figure 5: Step 2 Enter the details

8. In Step 3, click **Next**.
9. In Step 4, click **Save**.

Your **Event Status** text Custom field is now created and is added to the Lead Page Layout.

Creating an Event Booked checkbox Custom field

1. Follow steps 1–5 from Creating an Event Status text Custom field above.
2. In the New Custom field pane, select **Checkbox** and click **Next** (Figure 6).

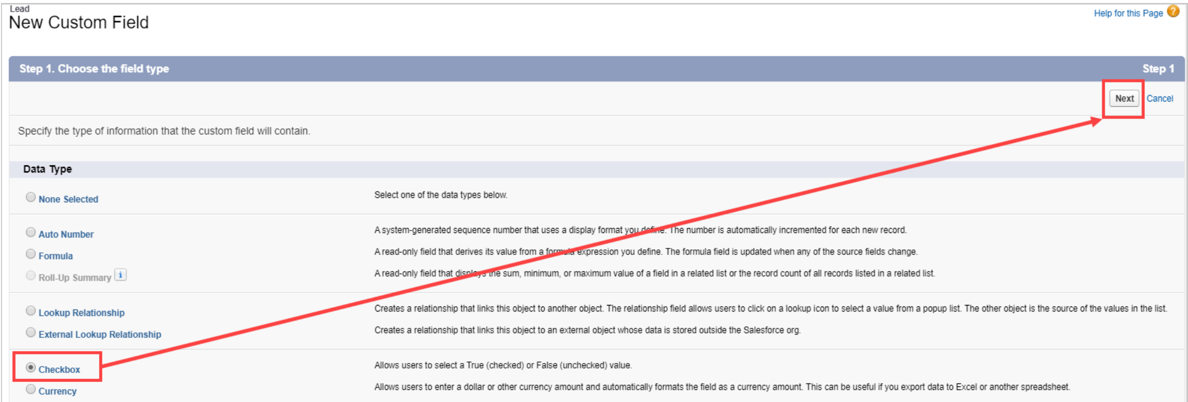


Figure 6: Checkbox

3. In **Step 2: Enter the details**, enter the following information (Figure 5). Add a description if required, then click **Next**.
   - **Field label:** Event Booked
   - **Default value:** Unchecked
   - **Field Name:** Event_Booked

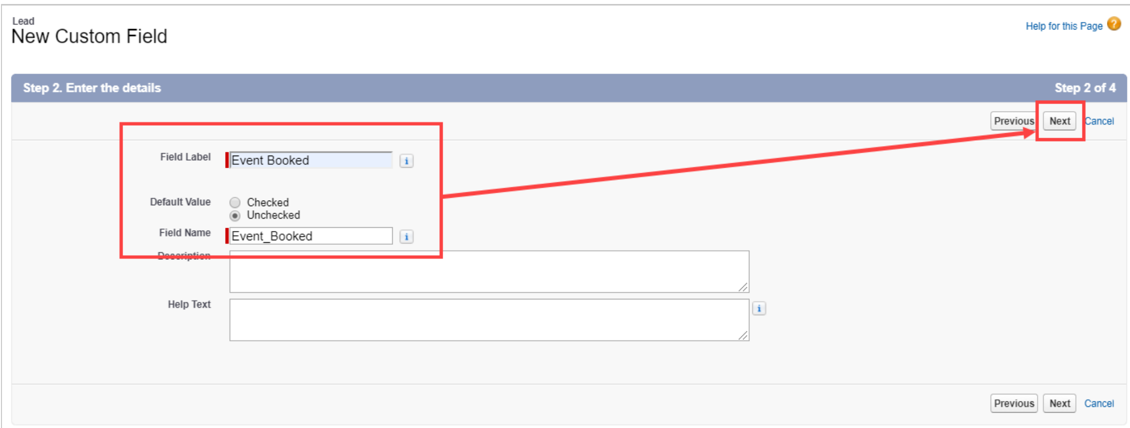


Figure 7: Step 2 Enter the details

4. In Step 3, click **Next**.
5. In Step 4, click **Save**.

Your **Event Booked** checkbox Custom field is now created and is added to the Lead Page Layout.

Mapping the OnceHub Status field to the Lead Event Status field

1. Select your profile picture or initials in the top right-hand corner → **Profile settings** → **CRM**.
2. In the Salesforce box, click **Setup**.
3. In the **Salesforce connector setup**, go to the **Field mapping** tab.
4. At the bottom left of the table, click **Add OnceHub fields** (Figure 8). The OnceHub field list includes System fields and Custom fields organized by categories.
5. The **Add OnceHub fields** pop-up will open
6. Use the **Filter by** drop-down menu to filter by **Booking data**.
7. Check the **Status** checkbox.
8. Click **Add fields**.

> **Note:**
>
> If you want to make the Workflow Rule specific to a Booking page or Event type, you can also map the OnceHub Booking page label or Event type name to specific Lead Custom fields. The Booking page label or Event type name can be used to refine the Salesforce Workflow rule that is triggered when a booking is made.

9. For the newly added **Status** field, select **Lead** from the first drop-down menu and select **Event Status (Event_Status__c)** from the second drop-down menu (Figure 8).

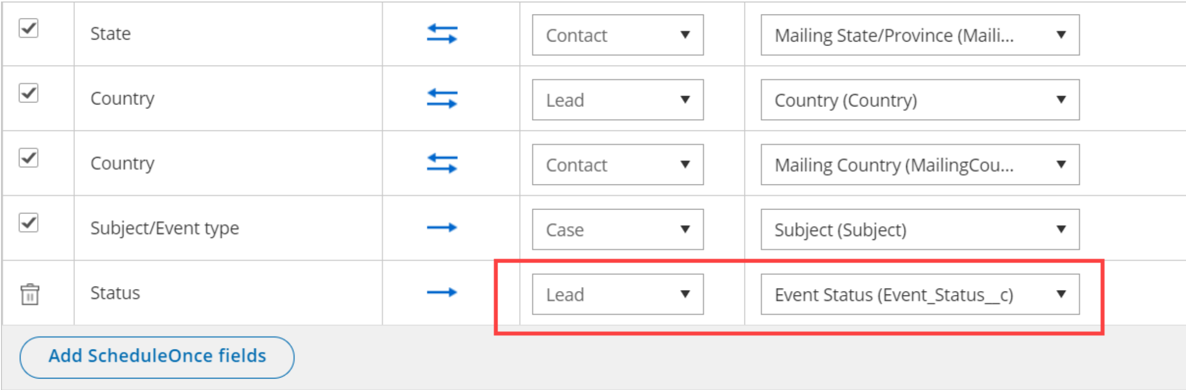


Figure 8: Map the Status field

10. Click the **Save** button or **Save and Continue** if you have completed mapping all fields.

Creating Workflow Rules in Salesforce

You can automate the update of many field records using workflow rules. We will create two workflow rules:

- **Workflow rule 1** checks the **Event Booked checkbox** and sets the Lead Status to **Working - Contacted** when the event is scheduled or rescheduled by Customer
- **Workflow rule 2** unchecks the **Event Booked checkbox** and sets the Lead Status to **Open – Not Contacted** when the event is not scheduled or rescheduled by Customer

To create Workflow rules, follow the steps below:

1. Sign in to Salesforce.
2. In your Salesforce **Setup** page, go to **Platform tools -> Process Automation**.
3. Select **Workflow Rules** (Figure 10).

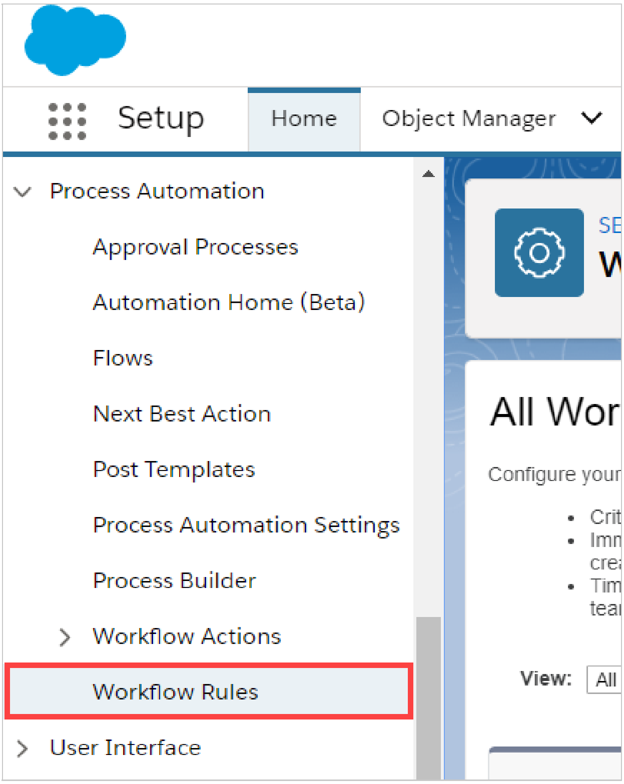


Figure 9: Workflow Rules

4. Click **New Rule**.
5. From the **Object** drop-down, select the object to which the rule will apply. In our example, select **Lead**.

Creating Workflow Rule 1

1. On the **New Workflow Rule page** in Salesforce, fill out the following information and click **Save & Next** (Figure 11).

- **Rule Name**: Update Lead fields when event is scheduled or rescheduled by Customer
- **Rule description**: The Rule checks the **Event Booked** checkbox and sets the Lead Status to **Working - Contacted** when the event is scheduled or rescheduled by Customer.
- **Evaluate the rule when a record is**: created, and every time it's edited
- **Rule Criteria:** Run this rule if the criteria are met:
  - **Lead: Event status** equals **Scheduled**
  - **Lead: Event status e**quals **Rescheduled by Customer**
  - **Advance filter logic:** 1 OR 2

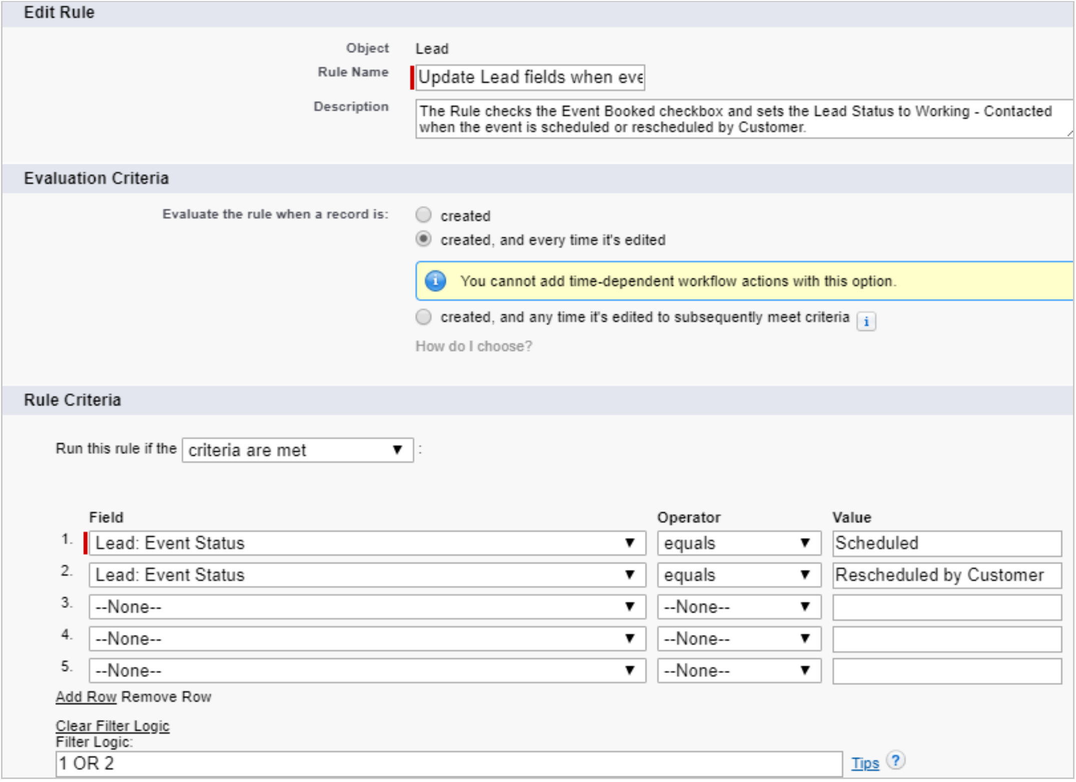


Figure 10: Update Lead fields when event is scheduled or rescheduled by Customer

2. On **Step 3: Specify Workflow Actions**, click **Add Workflow Action**.
3. Select **New Field Update** and add the following information (Figure 12):

- **Name**: Check the **Event Booked** checkbox automatically
- **Unique name:** Check_checkbox
- **Field to update**: Event Booked
- **Re-evaluate Workflow Rules after Field Change:** Checked
- **Checkbox Options:** True

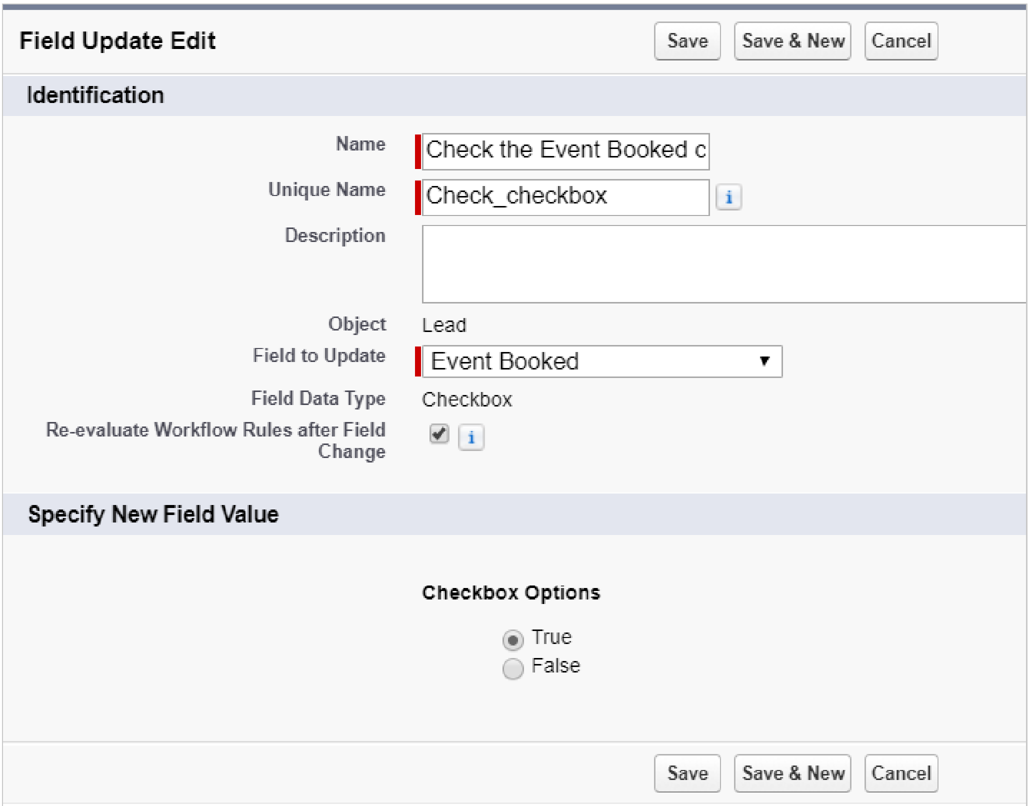


Figure 11: Automatically check the Event Booked checkbox

4. Click **Save & New**.
5. Add the following information (Figure 13):

- **Name**: Update the Lead Status picklist to Working - Contacted
- **Unique name**: Update_the_Lead_Status_picklist
- **Field to update**: Lead Status
- **Re-evaluate Workflow Rules after Field Change:** Checked
- **Picklist Option > A specific value:** Working – Contacted

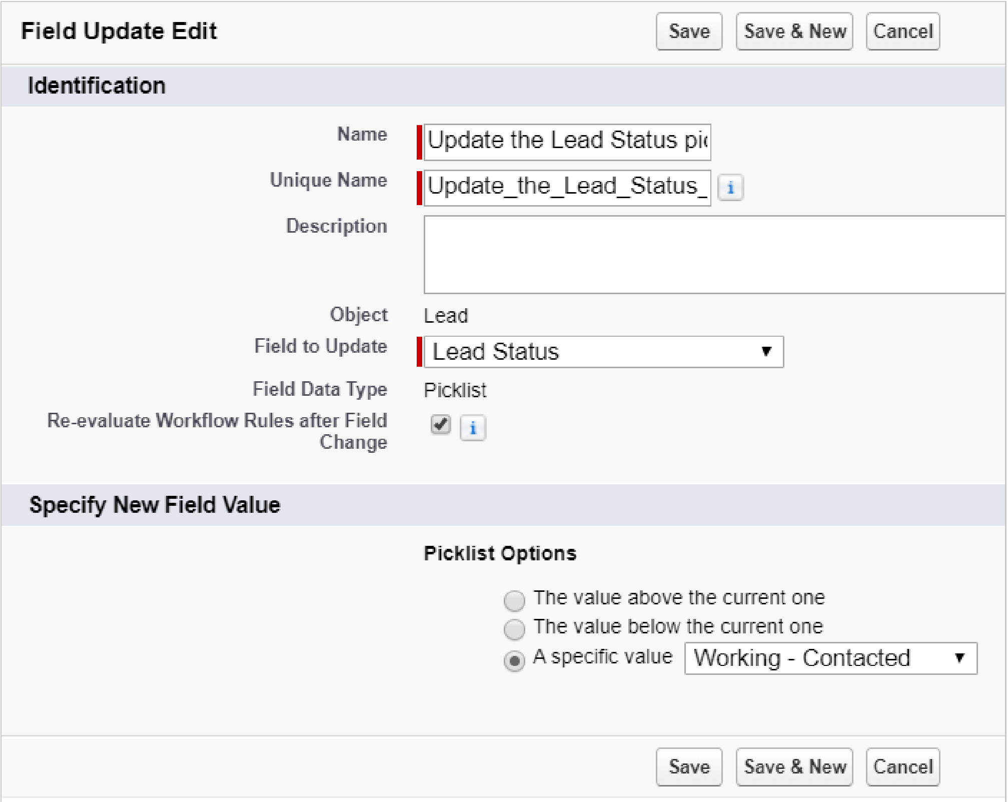


Figure 12: Update the Lead Status picklist to Working - Contacted

6. Click **Save**.
7. Click **Done**.
8. On the **Workflow Rules** page, click **Activate** to activate the rule.

Creating Workflow Rule 2

1. On the **New Workflow Rule page** in Salesforce, fill out the following information and click **Save & Next**.

   - **Rule Name**: Uncheck the **Event Booked** checkbox automatically when a booking is not scheduled or rescheduled by Customer.
   - **Rule description**: The **Event Booked** checkbox will be automatically unchecked on the Lead Page Layout when an event is not scheduled or rescheduled by the Customer for that record.
   - **Evaluate the rule when a record is**: created, and every time it's edited
   - **Rule Criteria: Run this rule if the following criteria are met:**
     - **Lead: Event status** not equal to **Scheduled**
     - **Lead: Event status** not equal to **Rescheduled by Customer**
     - **Advance filter logic:** 1 OR 2

2. On **Step 3: Specify Workflow Actions** , click **Add Workflow Action**.
3. Select **New Field Update**, add the following information:

   - **Name**: Uncheck the **Event Booked** checkbox automatically when a booking is made.
   - **Unique name:** Uncheck_the_Event_Booked_checkbox
   - **Field to update**: Event Booked
   - **Re-evaluate Workflow Rules after Field Change:** Checked
   - **Checkbox Options:** False

4. Click **Save & New**.
5. Add the following information:
    - **Name**: Change the Lead Status picklist to Open - Not Contacted
    - **Unique name**: Change_the_Lead_Status_picklist
    - **Field to update**: Lead Status
    - **Re-evaluate Workflow Rules after Field Change:** Checked
    - **Picklist Option > A specific value:** Open - Not contacted
6. Click **Save**.
7. Click **Done**.
8. On the **Workflow Rules** page, click **Activate** to activate the rule.

You're all set! You can now create a test booking in OnceHub to view how the Workflow Rules update your records when a booking is made.

Salesforce record creation, update, and assignment rules

Last Modified on Oct 18, 2022

The Salesforce setup process includes 5 steps: API connection, Installation, Field validation, Field mapping, and Creation rules.

In this article, you'll learn about how to define the way Leads, Contacts, and Cases will be created, updated, and assigned in Salesforce when a booking is made.

Requirements

To set up the OnceHub connector for Salesforce, you must:

- Be a OnceHub Administrator.
- Have an active connection to your Salesforce API user.

You do not need an assigned product license to install and update Salesforce account settings. Learn more

Accessing the Salesforce connector setup page

Select your profile picture or initials in the top right-hand corner → **Profile settings** → **CRM**. Then, click the **Setup** button in the Salesforce box (Figure 1).

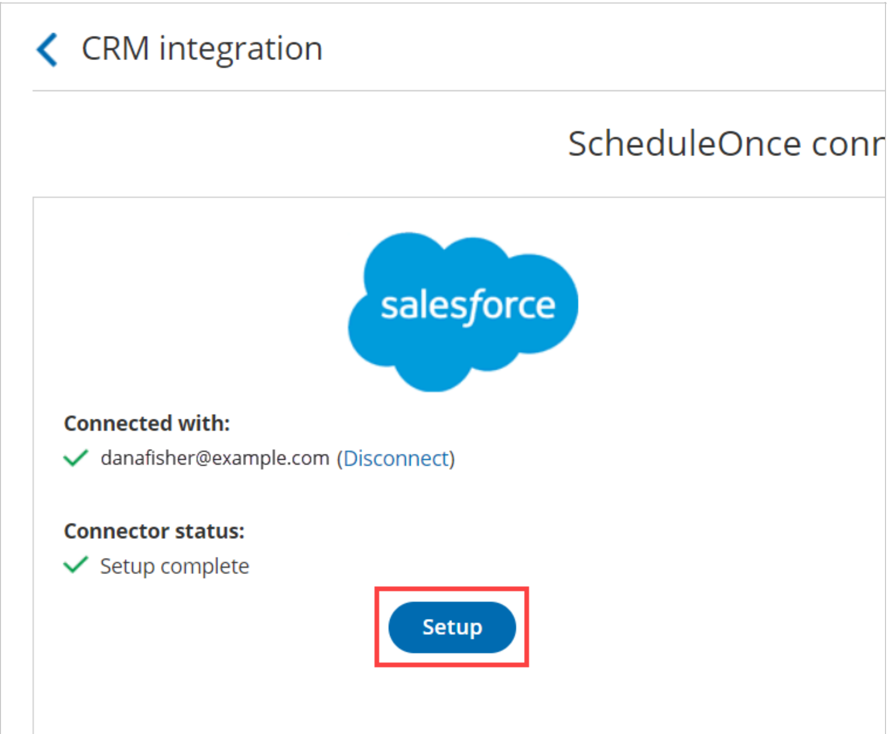


Figure 1: Salesforce setup

On the **Salesforce connector setup** page, select **Creation rules** (Figure 2).

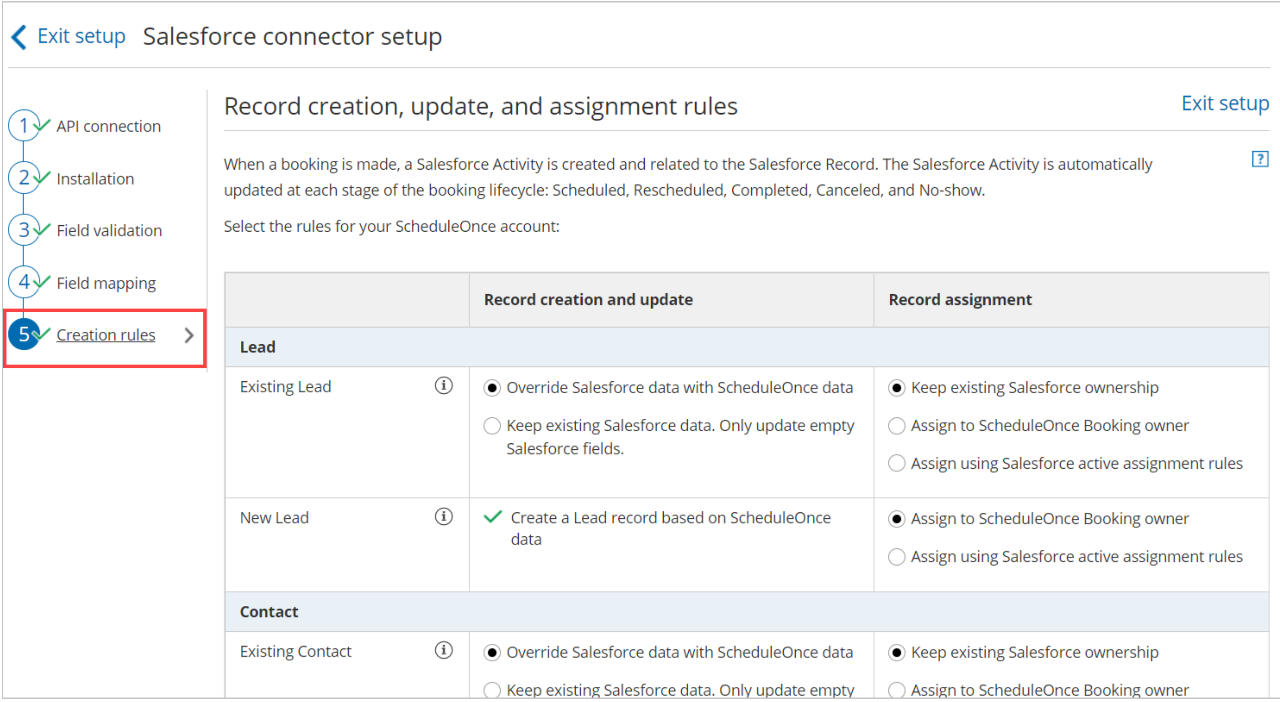
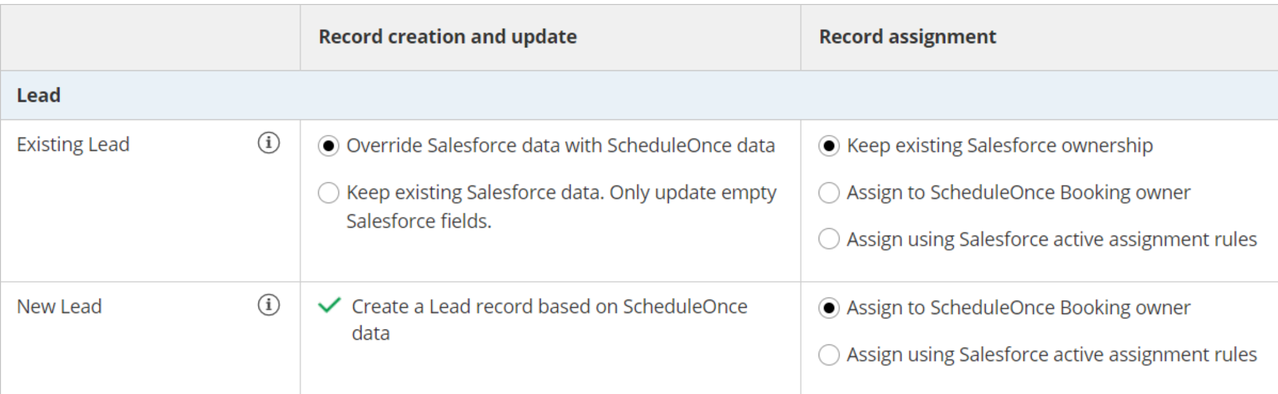


Figure 2: Creation rules

Lead records



	Record creation and update	Record assignment
Lead		
Existing Lead	◉ Override Salesforce data with ScheduleOnce data ○ Keep existing Salesforce data. Only update empty Salesforce fields.	◉ Keep existing Salesforce ownership ○ Assign to ScheduleOnce Booking owner ○ Assign using Salesforce active assignment rules
New Lead	✓ Create a Lead record based on ScheduleOnce data	◉ Assign to ScheduleOnce Booking owner ○ Assign using Salesforce active assignment rules

Figure 3: Lead records

Existing Leads

In this case, the Customer making the booking exists in Salesforce and is recognized based on their Lead Record ID or their email address.

- If you're scheduling with existing Salesforce Leads only, you should use our Personalized links (Salesforce ID) in your Salesforce email templates and Salesforce emails to automatically recognize the Lead based on their Salesforce Lead record ID. This allows you to prepopulate the Booking form step with Salesforce data, or skip it altogether.
- If you're not sure that the Customer making the booking already exists in Salesforce, you should use the General links to recognize the Customer based on their email address. When the Lead or Contact record is identified, it will be updated based on the option you have chosen in the Record creation and update rules.

When a booking is made, the options provided allow you to choose between:

- Overriding the existing Salesforce data with OnceHub data.
- Keeping the existing Salesforce data and only update empty fields.

You can also decide whether to keep the Salesforce ownership, assign the record to the OnceHub Booking page owner, or assign the record using Salesforce active assignment rules.

New Leads

In this case, the Customer making the booking does not exist in Salesforce. For this reason, you should use General links when making bookings with prospects that may or may not exist in your Salesforce database.

When a booking is made, OnceHub creates a new Lead record in Salesforce and adds a new Salesforce Activity Event. You can decide whether to assign the Lead record to the OnceHub Booking page Owner or assign the Lead record using Salesforce active assignment rules.

Contact records

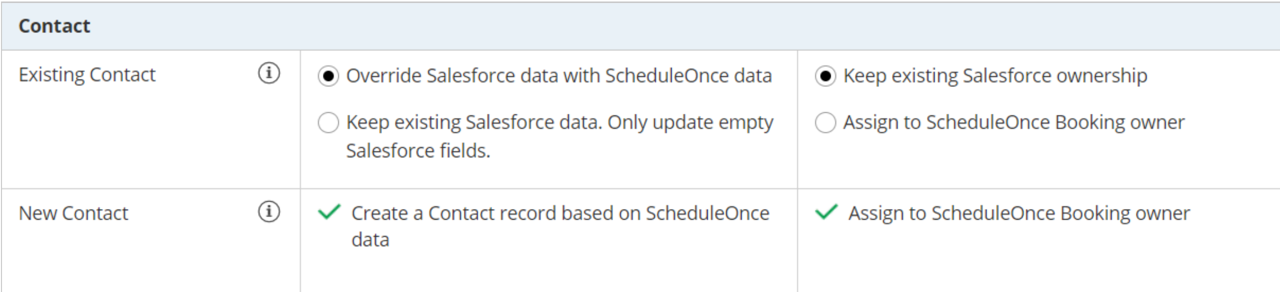


Figure 4: Contact records

Existing Contacts

In this case, the Customer making the booking exists in Salesforce and is recognized based on the email address or Contact Record ID.

- If you're scheduling with existing Salesforce Contacts only, you should use our Personalized links (Salesforce ID) in your Salesforce email templates and Salesforce emails to automatically recognize the Contact based on their Salesforce Contact record ID. This allows you to prepopulate the Booking form step with Salesforce data, or skip it altogether.
- If you're not sure that the Customer making the booking already exists in Salesforce, you should use the General links to recognize the Customer based on their email address. When the Lead or Contact record is identified, it will be updated based on the option you have chosen in the Record creation and update step.

When a booking is made, the options provided allow you to choose between:

- Overriding the existing Salesforce data with OnceHub data.
- Keeping the existing Salesforce data and only update empty fields.

You can also decide whether to keep the Salesforce ownership or assign the record to the OnceHub Booking page owner.

New Contacts

In this case, the Customer making the booking does not exist in Salesforce and the Account may or may not exist in Salesforce. For this reason, you should use General links when making bookings with prospects that may or may not exist in your Salesforce database.

When a booking is made, OnceHub creates a new Contact record in Salesforce, assigns the Contact to the OnceHub Booking page Owner, and adds a new Salesforce Activity Event.

> **Note:**
>
> When an Account does not exist in Salesforce, it is always created based on OnceHub data.

Case records

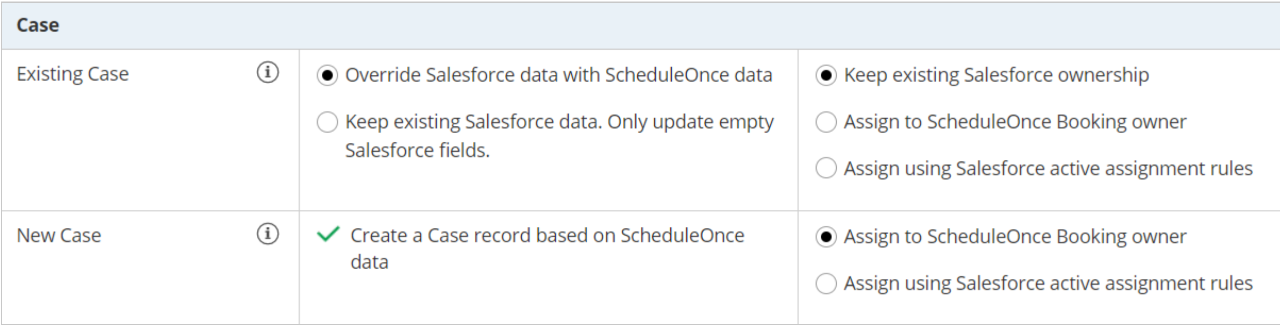


Figure 5: Case records

Existing Cases

In this case, the Case exists in Salesforce and is recognized based on the Salesforce Case Record ID. You should use our Personalized links (Salesforce ID) in your Salesforce email templates and Salesforce emails to automatically recognize the Case based on the Salesforce Case Record ID. This allows you to prepopulate the booking form step with Salesforce data, or skip it altogether.

When a booking is made, the options provided allow you to choose between:

- Overriding the existing Salesforce data with OnceHub data.
- Keeping the existing Salesforce data and only update empty fields.

You can also decide whether to keep the Salesforce ownership, assign the record to the OnceHub Booking page owner, or assign the record using Salesforce active assignment rules.

Note:

The Contact is always updated based on the Record creation and update rules.

New Cases

In this case, the Case doesn't exist in Salesforce and the Customer making the booking may or may not exist in Salesforce. For this reason, you should use General links when making bookings with prospects that may or may not exist in your Salesforce database.

When a booking is made, OnceHub creates a new Case record in Salesforce and adds a new Salesforce Event upon booking. You can decide whether to assign the Case record to the OnceHub Booking page Owner or assign the Case record using Salesforce active assignment rules.

Note:

The Contact is always updated based on the Record creation and update rules.

Supported and non-supported field types in the Salesforce integration

Last Modified on Oct 18, 2022

In this article, you'll learn about all of the supported and non-supported field types in our Salesforce integration.

Field validation and Field mapping

In the Field validation step of the Salesforce setup process, you must map OnceHub fields to Salesforce universally required fields. All supported and non-supported Salesforce fields that do not have a default value in your Salesforce organization will be shown. When you choose to assign a OnceHub field to a Salesforce field, only OnceHub fields that are supported by the integration will be shown in the Available fields list.

In the Field mapping step of the Salesforce setup process, you can map OnceHub fields to additional Salesforce fields. Only fields that are supported by the integration will be shown. Non-supported fields will not be included in the Salesforce or OnceHub field lists.

OnceHub fields

Supported OnceHub field types

Our Salesforce integration supports all OnceHub field types except for checkboxes. This means that most OnceHub System fields and Custom fields can be mapped to Salesforce fields in both the Field validation step and the Field mapping step of the Salesforce setup process.

Non-supported OnceHub field types

The only non-supported OnceHub field type is the checkbox. Any checkbox Custom fields that you are using in your Booking forms cannot be mapped to Salesforce fields.

The checkbox field type will not appear in either the Field validation step or Field mapping step of the Salesforce setup process.

Salesforce fields

Supported Salesforce field types

The Salesforce integration supports most Salesforce field types. Below are the supported Salesforce field types that can accept data from OnceHub:

Salesforce field types	Salesforce description
Currency	Allows Users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Date	Allows Users to enter a date, or pick a date from a pop-up calendar.
Date/Time	Allows Users to enter a date and time, or pick a date from a pop-up calendar. When Users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email	Allows Users to enter an email address, which is validated to ensure that it's in the proper format. If this field is specified for a contact or lead, Users can choose the address when sending an email. Note that custom email addresses cannot be used for mass emails.
Geolocation	Allows Users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number	Allows Users to enter any number. Leading zeros are removed.
Percent	Allows Users to enter a percentage number, such as "10", and automatically adds the percent sign to the number.
Phone	Allows Users to enter any phone number. Automatically formats it as a phone number.
Picklist	Allows Users to select a value from a list you define.
Text	Allows Users to enter any combination of letters and numbers.
Text Area	Allows Users to enter up to 255 characters on separate lines.
Text Area (Long)	Allows Users to enter up to 131,072 characters on separate lines.
Text Area (Rich)	Allows Users to enter formatted text, add images, and add links. Up to 131,072 characters on separate lines.
URL	Allows Users to enter any valid website address. When Users click on the field, the URL will open in a separate browser window.

Salesforce picklist fields types can be mapped to OnceHub fields in the Field mapping step. In Salesforce, the Salesforce picklist should include the mapped OnceHub field value. In addition, we recommend that you uncheck the **Strictly enforce picklist values** checkbox in the Salesforce picklist. This will enable Customers to make a booking even when the OnceHub value does not match the Salesforce picklist value. In this case, OnceHub will add the value to the Salesforce picklist.

Salesforce checkbox field types always have a default value set in Salesforce and will never appear in the Required mapping of the Salesforce connector. You can configure Salesforce workflow rules if you want to add an additional layer of Salesforce fields update logic. Learn more about Using Salesforce workflow rules to update fields based on OnceHub data

Non-supported Salesforce field types

Non-supported Salesforce field types will not be able to accept data from OnceHub and will not appear in the Field mapping step of the Salesforce setup process.

In the Field validation step, non-supported Salesforce field types that are universally required fields and do not have a default value set in Salesforce will be indicated. When a booking is made and a universally required field in Salesforce has not been mapped to a field in OnceHub, a Field validation error will be detected. OnceHub will pass a default value to the field in Salesforce until you resolve the Field validation error. Learn more about default values for universally required fields

Alternatively, you can set these fields as **Required** on the Page Layout only, which means they would only be Required fields for manual entry and not for the API. Learn more about Salesforce Page Layouts

Salesforce field type	Salesforce description
Lookup Relationship	Creates a relationship that links this object to another object. The relationship field allows Users to click on a Lookup icon to select a value from a list. The other object is the source of the values in the list.
External Lookup Relationship	Creates a relationship that links this object to an external object whose data is stored in an external data source.
Checkbox	Allows Users to select a True (checked) or False (unchecked) value.
Picklist (Multi-Select)	Allows Users to select multiple values from a list you define.
Text (Encrypted)	Allows Users to enter any combination of letters and numbers and store them in an encrypted form.

Non-supported Salesforce Event standard fields

The following Activity Event Standard fields are not supported and will not appear in the Field mapping step of the Salesforce setup process.

Salesforce field label	Salesforce field name	Salesforce field type

Start	StartDateTime	Date/Time
End	EndDateTime	Date/Time

If you’re still having problems, please contact us and we will be happy to assist you.

The Salesforce Activity Event

Last Modified on Oct 18, 2022

When a booking is made, a calendar event is always created and added to your connected calendar. When you use the OnceHub connector for Salesforce, by default a Salesforce Activity Event is also always created and related to a Salesforce Lead, Contact, or Case record. This is the recommended setting.

When a booking is made, a Salesforce Activity Event is always created and related to a Salesforce Lead, Contact, or Case record. The creation of the Activity Event is only the first step in the booking lifecycle. After the Activity Event is created, it is continuously updated through all phases of the booking lifecycle: **Scheduled**, **Rescheduled**, **Completed**, **Canceled**, or **No-show**. Learn more about OnceHub activity statuses

The **Event status** and the **Cancel/reschedule reason** fields are provided with the OnceHub connector for Salesforce and are mapped to OnceHub data. When these fields are added to the Event Page Layout, they are used for updating the Activity Event with any change in the booking lifecycle. Learn more about adding custom fields to Salesforce Page Layouts

- **Event status:** This field indicates the current phase of the booking in the booking lifecycle: **Scheduled**, **Rescheduled**, **Completed**, **Canceled**, or **No-show**.
- **Cancel/reschedule reason:** This field adds additional information to the **Canceled** and **Rescheduled** lifecycle phases by providing the reason given by the Customer or Booking owner when a booking is canceled or rescheduled.

If a booking is reassigned and both the original Booking page and new Booking page are connected to Salesforce, the Salesforce Activity ownership field will show the **Reassigned Booking owner**. The **Event Status** field will be updated to either **Scheduled (Reassigned by User)** or **Rescheduled (Reassigned by User)** depending on the booking lifecycle.

Note:

In the Salesforce connector settings on your Booking page, you can also choose to not create Salesforce Activity Events. When a Salesforce Activity Event is not created, the Salesforce calendar will not be updated. Disabling the creation of the Salesforce Activity Event is only relevant when you are using a third-party solution that syncs between your calendar and Salesforce, such as Cirrus Insight.

In this case, if you do not disable the creation of the Salesforce Activity Event, you may end up with duplicate entries in your Salesforce calendar, with one coming from the OnceHub connector and one coming from the third-party sync product.

Working with Salesforce Record Types

Last Modified on Jun 15, 2023

Record Types allow the Salesforce Administrator to manage multiple business processes, show different picklist values, and Page Layouts to different Salesforce Users. Learn more about creating Record Types

Record Types can be used in various ways, for example:

- Create Record Types for Leads to differentiate your regular sales deals from your Partner's generated leads, and offer different picklist values for each.
- Create Record Types for Cases to display different Page Layouts for Customer support cases versus billing cases.
- Create Record Types for Activity Events to differentiate scheduled events via OnceHub from scheduled events via direct sales calls by using different picklist values.

When Salesforce Record Types for Activity Events, Leads, Contacts, Accounts, and Case records are configured on your Booking page, the OnceHub connector for Salesforce will create a new record according your settings. This means that when a booking is made, new records are created with an associated Record Type in your Salesforce organization.

Important:

When you use Record types with Lead or Case processes, OnceHub uses the default values set under the Lead process or Case process for the Lead status or Case status standard fields. This is set automatically in the Field validation step of the Salesforce connector setup process.

In this article, you'll learn how to configure Salesforce Record Types for Booking pages you own or edit and how to assign the Record Type to the Salesforce User's Profile.

Requirements

To configure the Salesforce Record Types for your Booking pages, you must:

- Be connected to Salesforce.
- Be the Owner or an Editor of the Booking page.

In addition, to assign Salesforce Record Types to the Salesforce User's Profile, you must be a Salesforce Administrator.

Configuring Salesforce Record Types

You should ensure that OnceHub Users connected to Salesforce are associated with the correct Record Types in your Salesforce organization. Salesforce Record Types are available for a specific Salesforce User when they are assigned to them in their Profile or Permission Set.

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

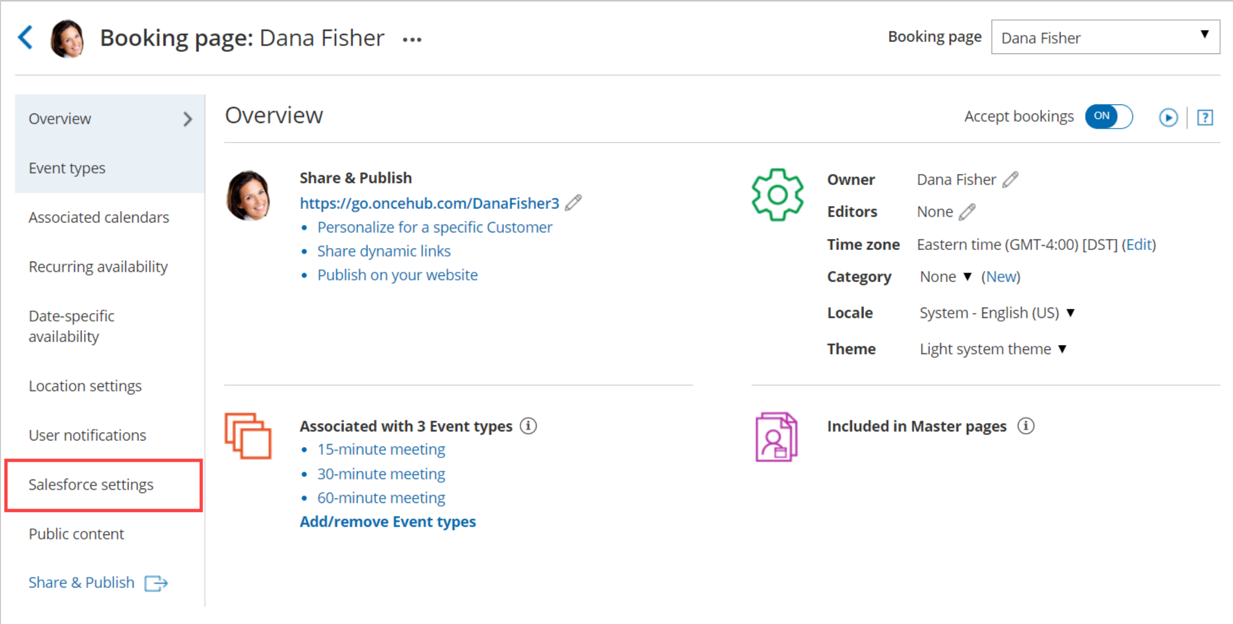


Figure 1: Salesforce settings on a Booking page

2. Select the Record Type that should be assigned to the Lead, Account, Contact, Event, and Case objects (Figure 2).

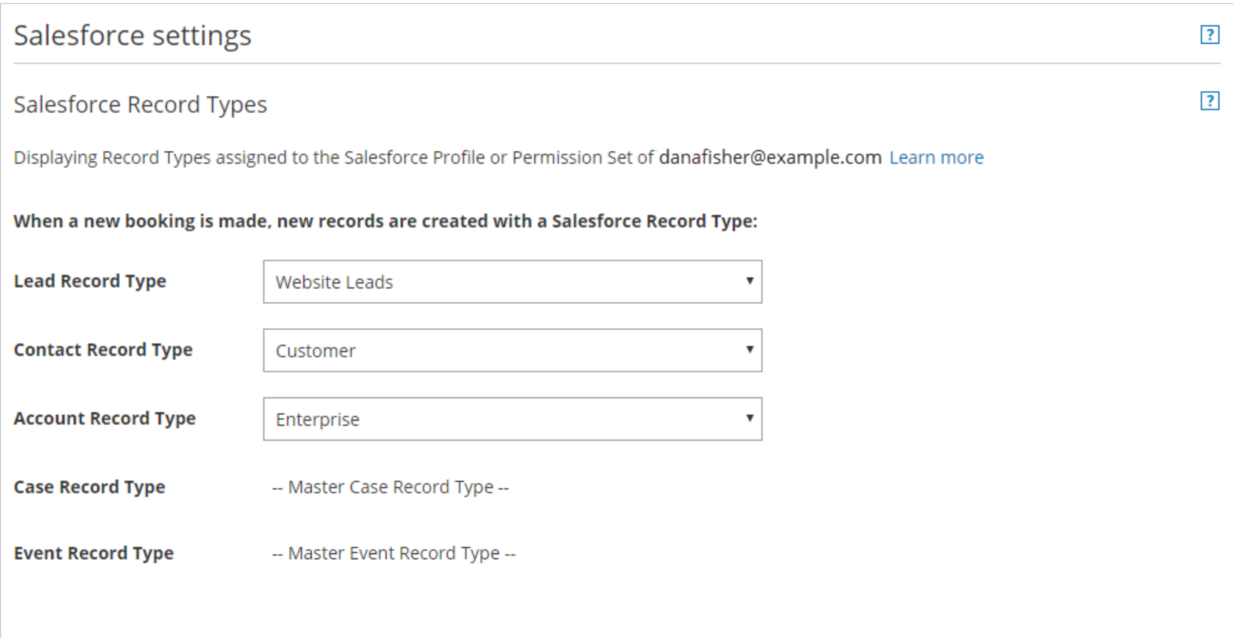


Figure 2: Salesforce Record Types settings

Learn more about configuring Salesforce connector settings on a Booking page

Assigning Salesforce Record Types to the Salesforce User's Profile

1. Sign in to Salesforce as an Administrator.
2. Go to the **Setup** page.
3. In the **Administration** section, go to **Users -> Profiles** (Figure 3).

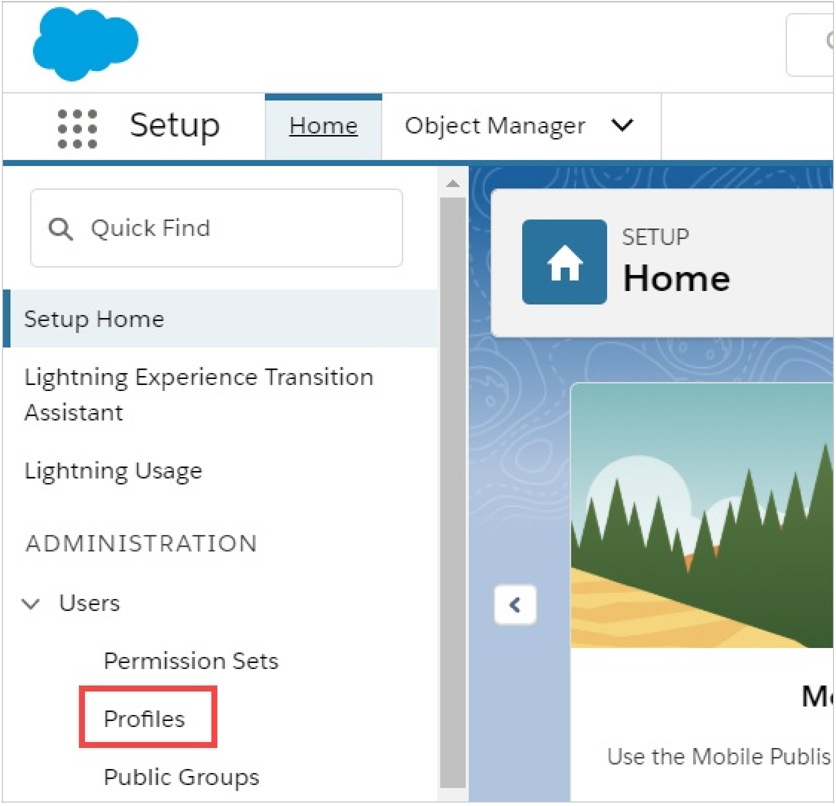


Figure 3: Profiles in the Users section

4. Select the **Profile** that is assigned to the Salesforce User connected to OnceHub.
5. From the **Record Type Settings** section, click **Edit** next to the Object that you want to modify.
6. From the **Record Type Settings Edit** for the Object, select the **Record Type** that you want to make available in OnceHub.

Infusionsoft integration

Last Modified on Nov 1, 2024

Our Infusionsoft integration makes OnceHub an integral part of your Infusionsoft solution, integrating your bookings with your Infusionsoft account.

You do not need an assigned product license to install and update Infusionsoft account settings, though you do need to be an Administrator. Learn more

Connecting the OnceHub Connector for Infusionsoft

Before you can set up and use the Infusionsoft integration with your bookings, you must first connect your OnceHub account to Infusionsoft.

Select your profile picture or initials in the top right-hand corner → **Profile settings** → **CRM**.

Once a User with Administrator privileges has connected, OnceHub Members simply need to sign in to their OnceHub accounts.

They should select their profile picture or initials in the top right-hand corner → **Profile settings** → **CRM** → click Connect. This will allow all bookings made on Booking pages owned by these Users to be passed over to Infusionsoft.

Configuring the OnceHub Connector for Infusionsoft

After connecting (as an Administrator), you can configure your creation, update, and assignment rules, determining how contacts will be created, updated, and assigned in Infusionsoft when a booking is made.

Whenever a booking is made, Contacts and Appointments can be automatically classified and prioritized in Infusionsoft. The Infusionsoft Contact is automatically created with a Lead source and all relevant classifications. This enables automatic triggering of follow-up sequences and automated campaigns, making OnceHub an extension of Infusionsoft's powerful marketing automation features.

Mapping fields from OnceHub to Infusionsoft

All OnceHub standard fields are mapped to Infusionsoft fields by default and we recommend you maintain these default field mappings. You can also map custom fields from OnceHub to the matching field of your choice in Infusionsoft.

Please note: There are some restrictions on the type of data which can be passed between OnceHub and Infusionsoft. See Supported and non-supported field types for full details.

Applying Infusionsoft tags to OnceHub bookings

When a booking is made, Infusionsoft tags are automatically added to Contact records. Tags help you divide your contact database into very specific lists so you can enable automatic triggering of follow-up sequences and automated campaigns.

When a booking is scheduled, rescheduled or canceled, booking lifecycle tags are automatically added to Contact records. These tags are updated at each stage of the booking lifecycle. Tags indicate if a booking has been scheduled, rescheduled, canceled, completed, or if the customer was a no-show. Additional levels of detail are available for scheduled and rescheduled bookings, with tags that indicate if a booking has been reassigned by a User. Canceled bookings include information about who canceled the booking, as well as if a request to reschedule was submitted.

Along with the OnceHub lifecycle tags, you can create Event type-specific tags in Infusionsoft and assign them to the relevant Booking page, Event, or Master page in OnceHub. Whenever a booking is made, the relevant tag(s) will be applied.

Embedding your Infusionsoft tracking code

You can easily embed your Infusionsoft tracking code within your OnceHub booking forms. This helps you optimize your Booking forms by capturing visitor activity and making it available for analysis in Infusionsoft.

Using the OnceHub Connector for Infusionsoft

When a booking is made, an Infusionsoft Contact record is created or updated and an Appointment is added automatically to the Contact record in Infusionsoft.

Using our Personalized links (Infusionsoft ID) in your Infusionsoft email and broadcasts, you can automatically recognize the Contact based on their Infusionsoft Record ID. This allows you to pre-populate or even skip the Booking form.

When scheduling with existing Infusionsoft Contacts, you can either use our Personalized links (Infusionsoft ID) in your Infusionsoft email and broadcasts, or use the Infusionsoft Record ID to identify Customers during the booking process.

Prepopulating or skipping the Booking form step in Infusionsoft integration

Last Modified on Oct 18, 2022

When scheduling with existing Infusionsoft Contacts, you can decide to pre-populate the Booking form step with Infusionsoft record data or completely skip the Booking form step.

Recognizing the Customer by the Infusionsoft Contact ID provides two key benefits:

- On the User side, it allows you to update the correct record, eliminating any chances of updating the wrong record and keeping your CRM data clean.
- On the Customer side, it eliminates the need to ask Customers for information you already have, improving conversion rates and moving leads through the funnel with speed and efficiency.

Recognizing the Infusionsoft Contact ID

You can recognize the Infusionsoft Contact ID in two cases:

- You can use our Personalized links (Infusionsoft ID) in Infusionsoft email and broadcasts.
- You can use the Infusionsoft Contact ID to personalize scheduling in landing pages used in your email marketing campaigns. Learn more about using Infusionsoft Contact ID to personalize scheduling in landing pages

Pre-populated Booking form

In this case, Customers will be presented with a Booking form that works in private mode. When the Booking form uses data stored in your Infusionsoft CRM, the prepopulated data used in the Booking is indicated as a checklist and the Customer can provide additional information if required. Learn more about prepopulated Booking forms

The Booking form fields are mapped to Infusionsoft fields based on the Mapping step.

Skipped Booking form

In this case, Customers will not be presented with a Booking form and this step of the booking process will be skipped, resulting in a faster booking process.

When hiding the Booking form, the Customer making the booking cannot provide a meeting subject. For this reason, the meeting subject should be defined by the Owner. If you skip the Booking form and still set the subject to be defined by the Customer, OnceHub will automatically generate a meeting subject such as *Meeting with John Smith*.

Please note that since the Customer name and Customer email are mandatory fields in OnceHub, the Booking form will not be skipped if these fields are empty in the Infusionsoft Contact record. In this case, OnceHub will show a pre-populated Booking form instead of hiding the form, so the Customer will have the opportunity to fill out these fields.

In addition, when adding the Mobile phone field to a skipped Booking form with the enable SMS notifications option turned on, the SMS notification opt-in/opt-out will be displayed when the Customer chooses a time for the booking. Booking form skipping can be used with Personalized links (Infusionsoft ID), web form integration and login integration.

Note :

For security and privacy reasons, using CRM record IDs to skip or pre-populate the Booking form is not compatible with collecting data from an embedded Booking page or redirecting booking confirmation data.

Using Infusionsoft Contact IDs to identify Customers during the booking process

Last Modified on Jul 26, 2019

When scheduling with existing Infusionsoft contacts, you can use the Infusionsoft Contact ID to identify Customers during the booking process. Recognizing the Customer by the record ID provides two key benefits:

- On the User side, it allows you to update the correct record, eliminating any chances of updating the wrong record and keeping your CRM data clean.
- On the Customer side, it allows you to prepopulate the Booking form step with Infusionsoft Contact record data or completely skip the Booking form step. This eliminates the need to ask Customers for information you already have, improving conversion rates and moving leads through the funnel with speed and efficiency.

The Infusionsoft Contact ID can be used in the following scenarios:

- You can use the Infusionsoft Contact ID in our Personalized links (Infusionsoft ID) to identify your Customers in your Infusionsoft email and broadcasts.
- You can use Infusionsoft Contact ID to personalize scheduling right after your prospects submit Infusionsoft Web forms.
- You can use the Infusionsoft Contact ID to personalize scheduling in landing pages used in your email marketing campaigns. Learn more about using Infusionsoft Contact ID to personalize scheduling in landing pages

Using Personalized links (Infusionsoft ID)

Last Modified on Oct 18, 2022

When scheduling with your existing Infusionsoft Contact base, you can use our special **Personalized links (Infusionsoft ID)** in your Infusionsoft email and broadcasts to automatically recognize the Contact based on their Infusionsoft record ID.

Recognizing the Customer by the Infusionsoft Contact ID provides two key benefits:

- On the User side, it allows you to update the correct record, eliminating any chances of updating the wrong record and keeping your CRM data clean.
- On the Customer side, it allows you to prepopulate the Booking form step with Infusionsoft record data or completely skip the Booking form step. This eliminates the need to ask Customers for information you already have, improving conversion rates and moving leads through the funnel with speed and efficiency.

Personalized links (Infusionsoft ID) are available for Booking pages and Master pages:

- When working with Booking pages, **Personalized links (Infusionsoft ID)** will be available only for Booking pages owned by Users connected to Infusionsoft.
- When working with Master pages, **Personalized links (Infusionsoft ID)** will always be available to you. However, Booking pages owned by Users not connected to Infusionsoft will work as General links.

Note :

For security and privacy reasons, using CRM record IDs to skip or prepopulate the Booking form is not compatible with collecting data from an embedded Booking page or redirecting booking confirmation data.

Where do I find the integrated Personalized links (Infusionsoft ID)?

Personalized links (Infusionsoft ID) are available in the **Share & Publish** section.

Note:

To use data from a database in a prepopulated Booking form, you first have to connect to Infusionsoft.

1. Log into OnceHub.
2. Select your profile picture or initials in the top right-hand corner → from the lefthand sidebar, select **Share & Publish → Mail merge** tab.
3. Select the relevant Booking page or Master page.
4. Under **Merging customer data**, select the **Personalized links (Infusionsoft ID)** (Figure 1).

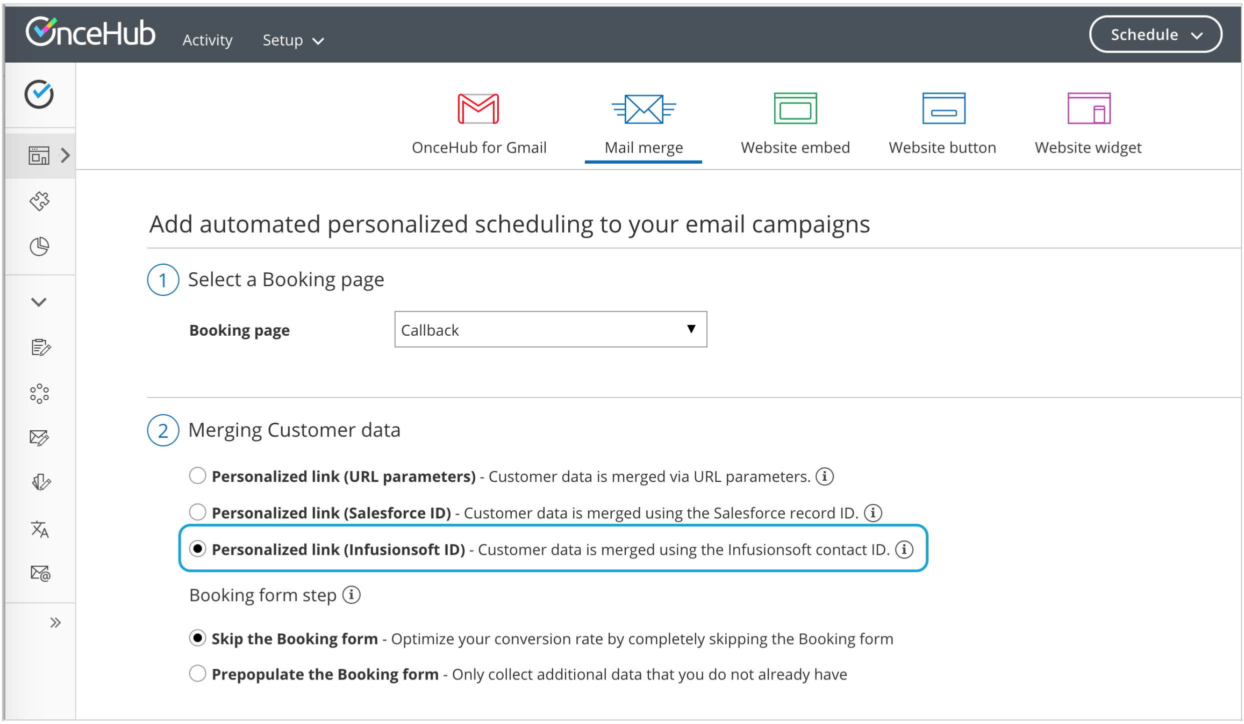


Figure 1: Selecting the Infusionsoft ID personalized link option

5. In the **Booking form** step, you can select one of the two options below:

- **Skip the Booking form:** Skipping the OnceHub Booking form helps you maximize your booking conversions and provides your Customers with a seamless and quick booking process.
- **Prepopulate the Booking form:** The Booking form works in private mode, in which the prepopulated data used in the Booking is indicated as a checklist and the Customer can provide additional information if required. Learn more about prepopulated Booking forms

6. Copy and paste the link into your Infusionsoft emails (see Figure 1).

Using InfusionSoft Contact IDs to personalize scheduling in landing pages

Last Modified on Oct 18, 2022

You can use the Infusionsoft Contact ID to personalize the booking process in your landing pages. Recognizing the Customer by the record ID provides two key benefits:

- On the User side, it allows you to update the correct record, eliminating any chances of updating the wrong record and keeping your CRM data clean.
- On the Customer side, it allows you to prepopulate the Booking form step with Infusionsoft Contact record data or skip the Booking form step completely. This eliminates the need to ask Customers for information you already have, improving conversion rates and moving leads through the funnel with speed and efficiency.

In this article, you will learn how to pass the Infusionsoft Contact ID to your landing pages. Then, you will learn how to generate the personalized website embed or button code for your landing pages.

Note:

If the Customer is not recognized based on the Infusionsoft Contact ID, OnceHub will use the Customer's email address to check if the record already exists in your CRM. Learn more about integrating with Infusionsoft

Requirements

To use the Infusionsoft Contact ID in your landing pages, you will need:

- A OnceHub Administrator for your organization.
- A completed Infusionsoft connector setup in OnceHub.
- A OnceHub User connected to Infusionsoft.

Note:

For security and privacy reasons, using CRM record IDs to skip or pre-populate the Booking form is not compatible with collecting data from an embedded Booking page or redirecting booking confirmation data.

OnceHub parameters for Infusionsoft

To recognize the Customer by the Infusionsoft Contact Id, you need to pass the OnceHub parameters for Infusionsoft to your landing page:

- Contact Record ID: *soisContactID*

You can also add an additional variable to your webpage to skip the Booking form step:

- Skipping the Booking form step: *soSkip=1*

Step 1: Constructing the landing page 's URL parameters

There are different operators used in the syntax of your URL:

- **?** - You must add the question mark to separate your URL from the variables.
- **&** - You can pass multiple variables by separating the variables with the ampersand.
- **=** - The equal sign separates the variable from the value assigned to that variable.

Take the following example landing page link:

```
http://www.example.com
```

If you wanted to pass the Infusionsoft Contact ID with the value being E9888900, you can add the following to the landing page link:

```
http://www.example.com?soisContactID=E9888900
```

Now if you wanted to pass the variable to skip the Booking form step as well:

```
http://www.example.com?soisContactID=E9888900&soSkip=1
```

Step 2: Generate the personalized code for your landing pages

Now that you have passed the Infusionsoft Contact ID to your landing page, you need to ensure that you have placed the personalized website embed or button code on your landing page.

1. Log into your OnceHub account.
2. Hover over the lefthand menu and go to the Booking pages icon → Hover over the lefthand side menu → **Share & Publish**.
3. To use the website embed or button on your landing page, go to the relevant section, **Website embed** or **Website button**, and select **Customer data is passed using the Infusionsoft Contact ID (web form integration)** from the **Customer data** step. Then copy and paste the embed or button code in your landing page.

Important:

If the Website embed or button code placed on your webpage was added prior to November 7, 2015, you will need to replace it with the updated OnceHub code.

How to maximize booking rates using Infusionsoft campaigns

Last Modified on Oct 18, 2022

When booking appointments is part of your email marketing campaigns, optimizing your booking rates becomes critical. In this article, you will learn how to configure Infusionsoft Campaign sequence, so that you track both bookings made, and more importantly, booking invitations that were missed or ignored. We call these, **missed bookings**. By tracking missed bookings, you are able to re-target them, and increase the overall booking rates for your campaign.

Note :

For security and privacy reasons, using CRM record IDs to skip or pre-populate the Booking form is not compatible with collecting data from an embedded Booking page or redirecting booking confirmation data.

Requirements

To maximize booking rates in Infusionsoft campaigns, you will need:

- A OnceHub administrator.
- An Infusionsoft Administrator for your organization.
- An active connection to the Infusionsoft connector

Let's assume that you have enabled OnceHub lifecycle tags in the Infusionsoft connector setup. When a booking is Scheduled, Rescheduled, Completed, Canceled or set to No-show, Lifecycle tags are automatically added to Contact records.

Note:

You can also use Infusionsoft tags that can be added to your Booking pages, Event types, and Master pages in the Infusionsoft connector setup wizard. These tags are automatically added to the Contact record for the selected booking lifecycle: Scheduled, Rescheduled, Completed, Canceled, or No-show. Learn how to tag Infusionsoft Contact records with Infusionsoft tags

Setting up Infusionsoft Campaigns to re-target missed bookings

Infusionsoft Campaigns allow you to automatically trigger the missed bookings. For this example, let's look at a lead qualification use case, whereby you want to send an email broadcast to a List of unqualified leads, inviting them to book a discovery call.

1. Log in to Infusionsoft.
2. In the Campaign builder, click **Create a Campaign** named "Maximizing Booking rates" and click Save.
3. From the Campaign tools, Add a **Sequence**. Double-click the **Sequence** and add the Email communication tool. (See Figure 1)

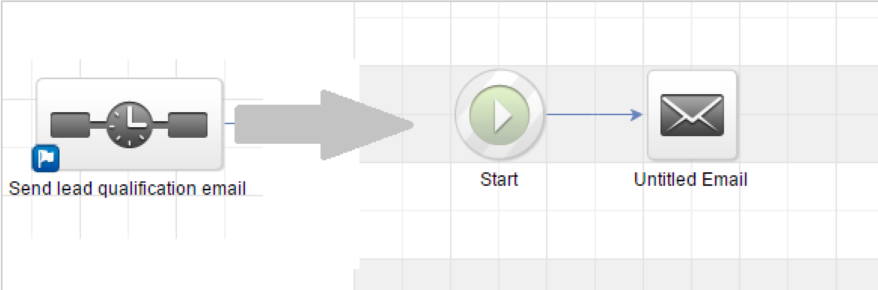


Figure 1: Send qualification Email

4. Now In the Campaign builder, add a **Timer sequence.** Double-click the **Sequence** and add the Delay Timer tool. (See Figure 2) During this time, Leads will submit the form.

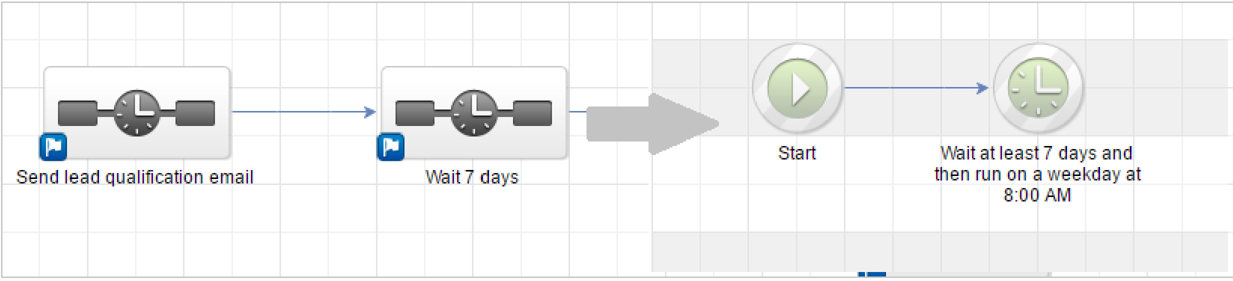


Figure 2: Delay Timer

5. Now you should connect the Timer Sequence to two Infusionsoft Campaign sequences (See Figure 3):

- One sequence should target leads that DID make a Booking.
- Another sequence should target leads that DID NOT make a Booking.

> **Note:**
>
> If you are using the Email communication object to schedule with your existing Infusionsoft Contacts, you should either use our Personalized links (Infusionsoft ID) or use URL variables to pass the Infusionsoft Contact ID to the Website embed,widget, or button placed in a landing webpage.

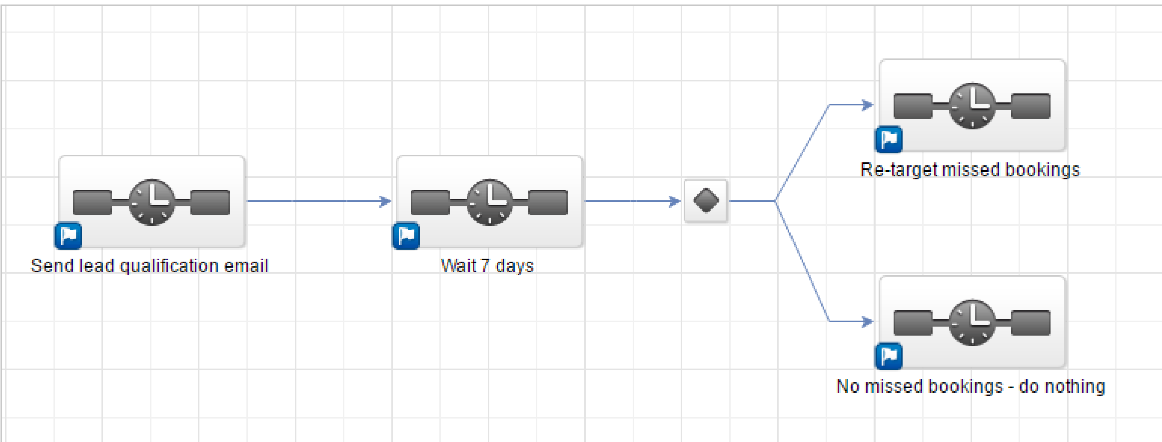


Figure 3: Connection of two sequences

6. When you connect a campaign sequence to multiple sequences, a decision node is created automatically. Learn more about Decision nodes

Double-click the **Decision node** to configure it. You should create a rule for each Campaign sequence. In each rule, you simply need to use the lifecycle tags that are added to the Contact when a booking is made: (see figure 4)

1. The first rule should tag leads that DID make a Booking when Tags contain "Scheduled"
2. The second rule should re-target leads that DID NOT make a Booking Tags do not contain "Scheduled"

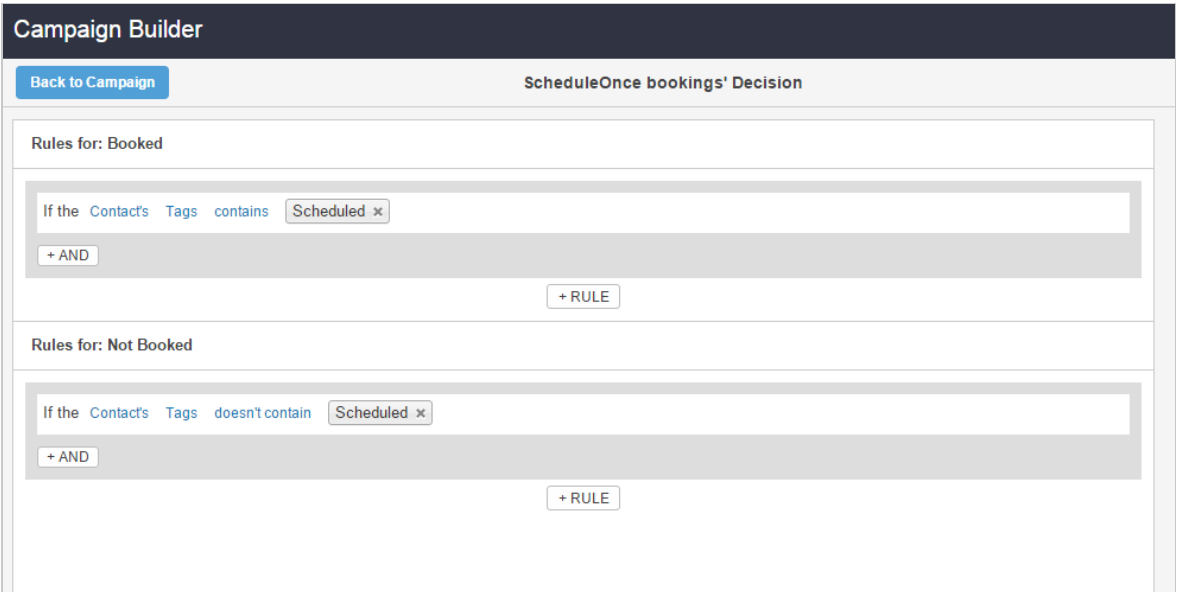


Figure 4: Rules

7. **Run the campaign** and make sure to monitor your **re-targeting missed bookings** campaign.

> **Note:**
> You can run this campaign as many times as you need, in order to continuously maximize your booking rates.

Infusionsoft Scheduling buttons

Last Modified on Jun 2, 2023

Infusionsoft Scheduling buttons provide quick access to a record-specific booking page link. Bookings made via this link are automatically added to the Contact and the customer making the booking does not have to provide any information that already exists for this Contact. Infusionsoft scheduling buttons can be used in two ways:

- The Booking page link can be copied and sent to the customer
- The Infusionsoft user can schedule on behalf of the customer

Infusionsoft scheduling buttons can be configured to prepopulate the booking form, or skip it altogether.

In this article, you will learn how to create an Infusionsoft scheduling button and add it to the Contact record in Infusionsoft.

Requirements

To add the button to the Contact in Infusionsoft, you will need:

- Use a Google Chrome browser.
- The permission to add custom JavaScript code to Google Chrome.
- A completed Infusionsoft connector setup in OnceHub.
- A OnceHub User connected to Infusionsoft.

Adding the Infusionsoft Scheduling button to Infusionsoft Contact records

1. Download the custom JavaScript extension for Chrome. This tool is used to inject JavaScript code to your website URLs. The script is kept in the local storage and is applied across the Infusionsoft domain URLs.
   When downloaded, the ***cjs*** extension is added to your Chrome browser.
2. Log in to Infusionsoft.
3. In the right hand side of the Google Chrome browser toolbar, click the ***cjs*** extension.
   The ***Custom JavaScript*** window appears.
4. Select the Infusionsoft domain in the **Domain** drop-down (Figure 1). Check the **enable *cjs* for this host** checkbox.

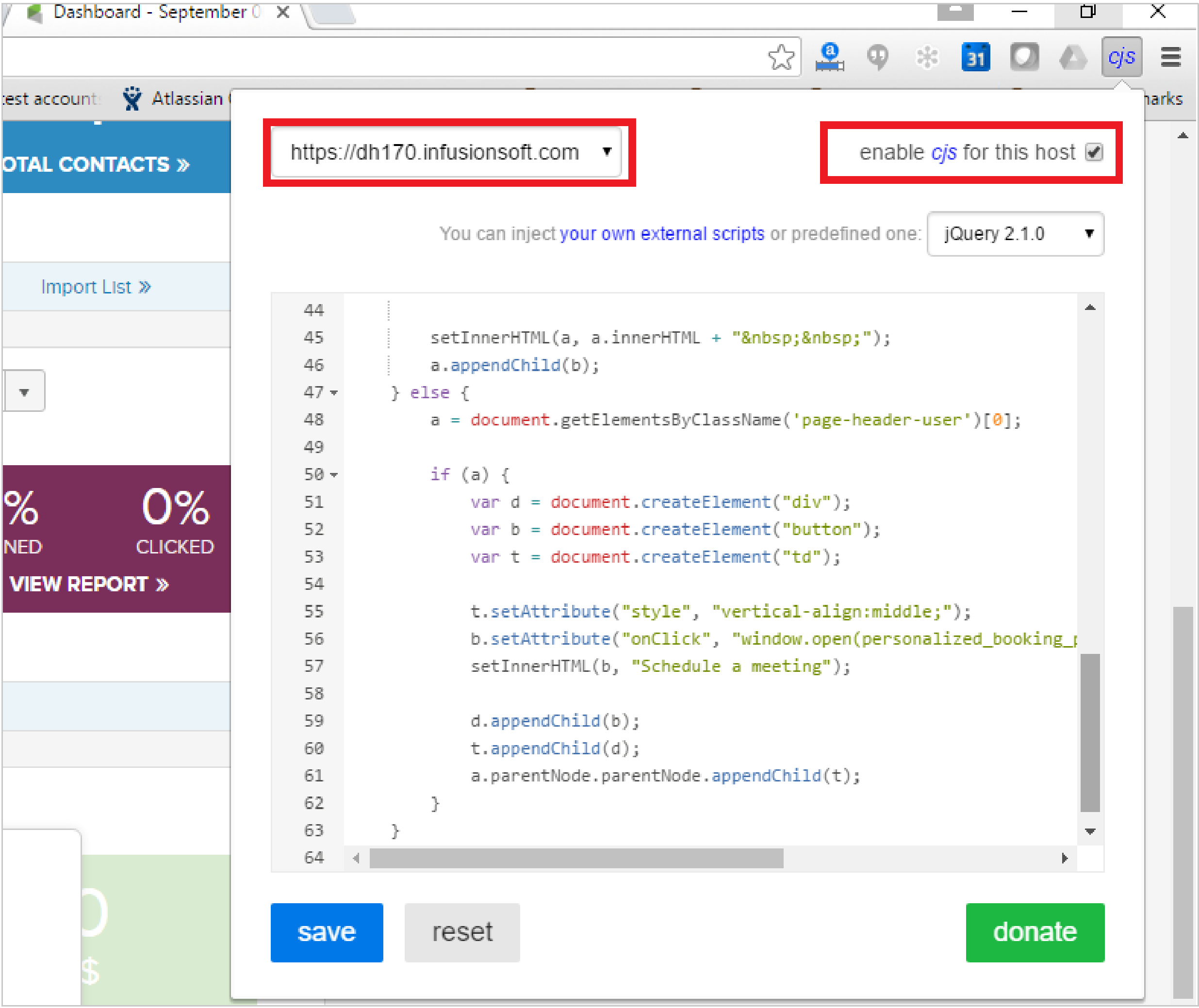


Figure 1: Custom JavaScript extension

5. In the code below, replace <booking page link> with your Booking page general link and Schedule a meeting with the label of your choice. For example: *https://go.oncehub.com/JohnSmith?soskip=1&soisContactID=*

```
var personalized_booking_page_url = '<Booking page link>?soskip=1&soisContactID=';
var getPathParameter = function getPathParameter(sParam) {
    var sPageURL = decodeURIComponent(window.location.pathname),
        sURLVariables = sPageURL.split('/'),
        i;
    for (i = 0; i < sURLVariables.length; i++) {
        if (sURLVariables[i] === sParam) {
            return sURLVariables[i] === undefined ? true : sURLVariables[i];
        }
    }
};
var getUrlParameter = function getUrlParameter(sParam) {
    var sPageURL = decodeURIComponent(window.location.search.substring(1)),
        sURLVariables = sPageURL.split('&'),
        sParameterName,
        i;
    for (i = 0; i < sURLVariables.length; i++) {
        sParameterName = sURLVariables[i].split('=');
        if (sParameterName[0] === sParam) {
            return sParameterName[1] === undefined ? true : sParameterName[1];
        }
    }
};

function setInnerHTML(element, content) {
    element.innerHTML = content;
    return element;
} // -- Display the 'Schedule a meeting' button when a full record is displayed
if (getPathParameter('Contact') == 'Contact') {
     var a = document.getElementsByClassName('ph_link')[0]; if (a) {
          var b = document.createElement("button");
               b.setAttribute("onClick",
              "window.open(personalized_booking_page_url + getUrlParameter('ID'), '_blank');");
               setInnerHTML(b, "Schedule a meeting");
               setInnerHTML(a, a.innerHTML + "  ");
               a.appendChild(b);
}
else { a = document.getElementsByClassName('page-header-user')[0];
     if (a) {
          var d = document.createElement("div");
          var b = document.createElement("button");
          var t = document.createElement("td");
          t.setAttribute("style", "vertical-align:middle;");
          b.setAttribute("onClick", "window.open(personalized_booking_page_url + getUrlParameter('ID'), '_blank');");
          setInnerHTML(b, "Schedule a meeting");
          d.appendChild(b);
          t.appendChild(d);
          a.parentNode.parentNode.appendChild(t);
          }
     }
}
```

When your changes are made, copy and paste the code to the Code area of the *cjs* extension.

6. Click **Save.**
   You are done. You can open any Contact record, click the button and make a test booking (Figure 2).

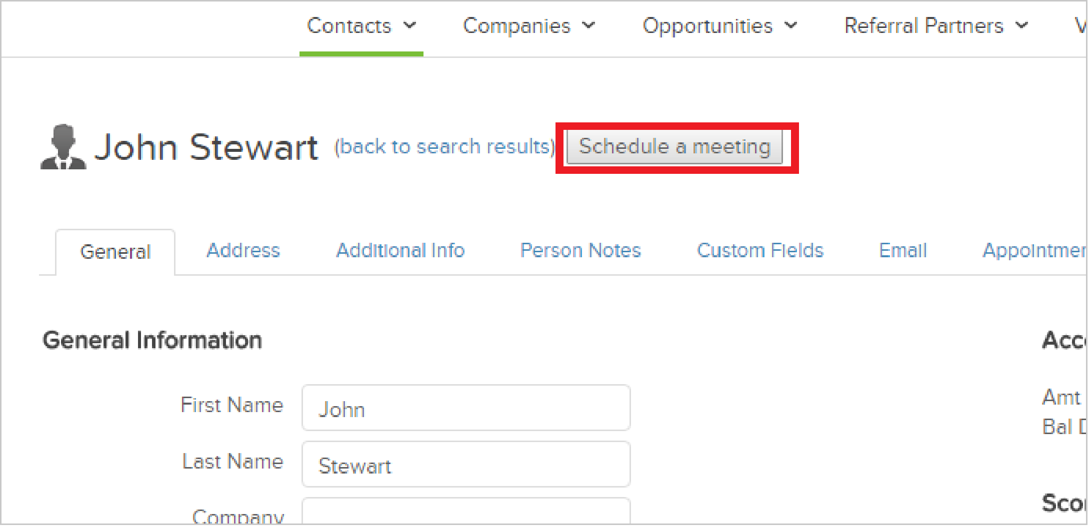


Figure 2: Infusionsoft Scheduling button

Connecting to Infusionsoft

Last Modified on Oct 18, 2022

In this article, you will learn how to connect to your Infusionsoft account. Each OnceHub User should connect to his/her own Infusionsoft account.

You do not need an assigned product license to install and update Infusionsoft account settings, though you do need to be an Administrator. Learn more

Connect to Infusionsoft

1. Open OnceHub.
2. Select your profile picture or initials in the top right-hand corner → **Profile settings** → **CRM**.
3. From the **Infusionsoft** box, click the **Connect** button.
4. You will be redirected to the Infusionsoft login page and will be asked to enter your username and password. Once you enter your Infusionsoft credentials, OnceHub will establish the connection to Infusionsoft and you will be returned to the CRM integration page.
5. On the CRM page, you will see the Infusionsoft application name, your connected username, and the Infusionsoft connector status.
6. If you are a OnceHub administrator, you will also have the option to configure your Infusionsoft connector by clicking the **Setup** button (Figure 1).

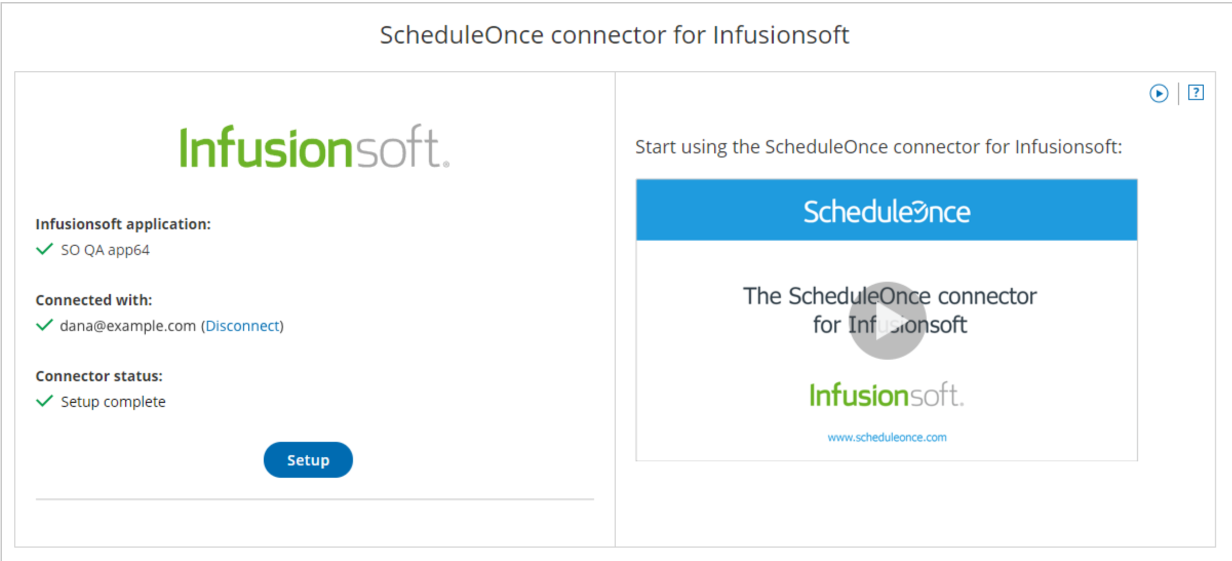


Figure 1: Connected to Infusionsoft

Note:

OnceHub Members will not be able to connect to Infusionsoft until the Setup has been completed. In addition, there must always be at least one OnceHub Administrator connected to Infusionsoft.

The Administrator connected to Infusionsoft does not need to have a scheduled meetings User license. Learn more

Once these conditions are met, you can enjoy the full benefits of Infusionsoft integration.

Infusionsoft record creation, update, and assignment rules

Last Modified on Oct 18, 2022

The Infusionsoft connector setup wizard includes 5 steps: Creation, Classification, Tagging, Mapping, and Tracking. Only Administrators can setup the Infusionsoft connector.

> **Important:**
>
> You must be connected to your Infusionsoft account to be able to setup the connector.

In this article, you will learn how to configure the Creation step of the Infusionsoft connector setup wizard. In this step, you will define how contacts will be created, updated and assigned in Infusionsoft when a booking is made. You can access the Infusionsoft wizard by clicking the Setup button in the Infusionsoft area of the CRM page under the Integration page.

New Contact

In this case, the Customer making the booking does not exist in Infusionsoft. Hence you should use the General links when making bookings with prospects that may or may not exist in your Infusionsoft Contact base.

When a booking is made, OnceHub creates a new record in Infusionsoft, assigns the Contact to the OnceHub Booking page Owner, and adds a new Appointment upon booking.

Existing Contact identified via Email address

In this case, you are not sure if the Customer making the booking is already an Infusionsoft contact. For this reason, you should use the General links that recognize the Customer based on their email address.

When a booking is made, the options provided allow you to choose between:

- Overriding the existing Infusionsoft data with OnceHub data
- Keeping the existing Infusionsoft data and only update empty fields
- Creating a new record

You can also decide whether to keep the Infusionsoft ownership or assign the record to the OnceHub Booking page owner.

Existing Contact identified with an Infusionsoft Contact ID

In this case, you are scheduling with existing Infusionsoft contacts only. You should use our Personalized links (Infusionsoft ID) in your Infusionsoft email and broadcasts to automatically recognize the Contact based on their Infusionsoft record ID. This allows you to prepopulate the booking form step with Infusionsoft data, or skip it altogether.

When a booking is made, the options provided allow you to choose between:

- Assign the contact record to the OnceHub Booking page owner
- Keeping the existing Infusionsoft data and only update empty fields

You can also decide whether to keep the Infusionsoft ownership or assign the record to the OnceHub Booking page owner.

You should consider your organizational processes when selecting the Creation and update options. For example, you may want to control the data entered into Infusionsoft. In this case you should choose to add an Appointment without updating the existing Contact record.

Infusionsoft record classification

Last Modified on Oct 18, 2022

The Infusionsoft connector setup wizard includes 5 steps: Creation, Classification, Tagging, Mapping, and Tracking. Only OnceHub Administrators can setup the Infusionsoft connector. You can access the Infusionsoft connector setup wizard by going to

Select your profile picture or initials in the top right-hand corner → **Profile settings** → **CRM**.

Important:

You must be connected to your Infusionsoft account to be able to setup the connector.

When a booking is made, Contacts and Appointments can be automatically classified and prioritized in Infusionsoft. The Infusionsoft Contact is automatically created with a Lead source and all relevant classifications. This enables automatic triggering of follow-up sequences and automated campaigns, making OnceHub a seamless extension of Infusionsoft's powerful marketing automation features.

Automatic classification: The Lead source

- Lead sources are created and assigned automatically to a Contact record when a booking is made.
- All Lead sources created by OnceHub are stored in Infusionsoft under the OnceHub Lead source category.
- The Lead source reflects the customer's selections during the booking process. For example, when making a booking on your Master page, the customer selects an Event type and then a provider. In this case, the Lead source will display the Master page label, the Event type name, and the Booking page label – e.g. Professional Services Group > Initial Discovery Session > John Smith

Setting record classification rules

- In the **Classification** step of the Infusionsoft connector setup wizard, you can choose specific values for Infusionsoft picklists stored in the Contact and Appointment records. If you decide to skip the Classification step, the following default values will be used:
  - Person Type (Contact.ContactType): Prospect
  - Appointment Action Type (ContactAction.ActionType): Call
  - Appointment Priority (ContactAction.Priority): Non-Essential
- OnceHub retrieves Infusionsoft values stored in Contact and Appointment fields. If you added additional values to Infusionsoft fields via the Infusionsoft API or Campaign builder, you will be able to access them in the OnceHub Classification step.

Tagging Infusionsoft Contact records with Lifecycle tags

Last Modified on Oct 18, 2022

The Infusionsoft setup wizard includes 5 steps: Creation, Classification, Tagging, Mapping, and Tracking. Only OnceHub Administrators can configure the Infusionsoft connector. To access the Infusionsoft wizard, select your profile picture or initials in the top right-hand corner → **Profile settings** → **CRM**.

Important:

You must be connected to your Infusionsoft account in order to setup the connector.

When a booking is Scheduled, Rescheduled, Completed, Canceled or set to No-show, Lifecycle tags are automatically added to Contact records. Tags help you divide your contact database into very specific lists so that you can enable automatic triggering of follow-up sequences and automated campaigns.

Note:

If you wish to record a Customer as a No-show, you will need to manually change the status of the meeting from Completed to No-show in the Activity stream. Learn more about tracking and reporting of no-shows

Lifecycle tags are automatically updated at each stage of the booking lifecycle, reflecting the status of the booking. There are two types of Lifecycle tags applied to Infusionsoft contact records:

- **Generic lifecycle tags:** When multiple appointments are booked with the same contact, lifecycle tags represent the latest appointment status update. Generic lifecycle tags should be used to satisfy a campaign goal in the campaign builder. Learn more
- **Appointment-specific lifecycle tags:** These tags are identified by their Booking ID. For example: *Scheduled (Booking ID: BKNG-8JNM25GVS31X).* Appointment-specific life cycle tags can be used when campaigns are run manually from the Infusionsoft Contacts module. Learn more

The following table lists the possible actions associated with bookings and the Lifecycle tags that will be created in each phase of the booking lifecycle. The Generic and Appointment specific lifecycle tags are identical, except that the Appointment-specific lifecycle tags include the appointment's Booking ID.

Action	Generic lifecycle tag	Appointment-specific lifecycle tag
The booking is created	Scheduled	Scheduled (Booking ID: BKNG-8JNM25GVS31X)
Customer rescheduled the booking	Rescheduled by Customer	Rescheduled by Customer (Booking ID: BKNG-8JNM25GVS31X)
Customer rescheduled a booking at the Owner's request	Rescheduled by Owner	Rescheduled by Owner (Booking ID: BKNG-8JNM25GVS31X)

Owner canceled the booking and sent a booking reschedule request	Canceled (reschedule requested by Owner)	Canceled (reschedule requested by Owner) (Booking ID: BKNG-8JNM25GVS31X)
The booking took place at the scheduled time	Completed	Completed (Booking ID: BKNG-8JNM25GVS31X)
Customer canceled the booking	Canceled by Customer	Canceled by Customer (Booking ID: BKNG-8JNM25GVS31X)
Owner canceled the booking	Canceled by Owner	Canceled by Owner (Booking ID: BKNG-8JNM25GVS31X)
Booking was marked as No-show	No-show	No-show (Booking ID: BKNG-8JNM25GVS31X)
User reassigned a scheduled booking	Scheduled (Reassigned by User)	Scheduled (Reassigned by User) (Booking ID: BKNG-8JNM25GVS31X)
User reassigned a rescheduled booking	Rescheduled (Reassigned by User)	Rescheduled (Reassigned by User) (Booking ID: BKNG-8JNM25GVS31X)

Tagging Infusionsoft Contact records with Infusionsoft tags

Last Modified on Oct 18, 2022

The Infusionsoft connector setup wizard includes 5 steps: Creation, Classification, Tagging, Mapping, and Tracking. Only OnceHub Administrators can setup their Infusionsoft connector. To access the Infusionsoft connector setup wizard, select your profile picture or initials in the top right-hand corner → **Profile settings** → **CRM**.

Important:

You must be connected to your Infusionsoft account in order to setup the connector.

Infusionsoft tags are tags that you have created in Infusionsoft. These tags are automatically added to the Contact record for the selected booking lifecycle: Scheduled, Rescheduled, Completed, Canceled, or No-show.

Tags help you segment your contact database into very specific lists so that you can enable automatic triggering of follow-up sequences and automated campaigns.

This article shows you how to add your Infusionsoft tags to your Booking pages, Event types and Master pages.

1. **In Infusionsoft**, create all the tags that you want to add to your Booking pages, Event types and Master pages. Learn more about creating Tags in Infusionsoft

   Note:

   We recommend that you create specific *Tag categories in Infusionsoft. This can help you organize the Tags that you need for scheduling, and enable you to filter your tag list in OnceHub.*

   Now, let's customize the Infusionsoft connector setup in your OnceHub account to use your Infusionsoft tags.

2. In OnceHub, reach the **Tagging** step in the Infusionsoft setup wizard, and under the section **(2) Infusionsoft tags**, choose the Booking lifecycle phase:

   - **Scheduled** - The booking has been created
   - **Scheduled (Reassigned by User)** - User reassigned the scheduled booking
   - **Rescheduled by Custome**r - Customer rescheduled the booking
   - **Rescheduled by Owner** - Customer rescheduled a booking at the Owner's request
   - **Rescheduled (Reassigned by User)** - User reassigned the rescheduled booking
   - **Canceled (reschedule requested by Owner)** - Owner canceled the booking and sent a booking reschedule request
   - **Completed** - The booking took place at the scheduled time
   - **Canceled by Customer** – Customer canceled the booking
   - **Canceled by Owner** - Owner canceled the booking
   - **No show** - Booking was marked as a no-show

3. To add Infusionsoft tags to your Booking pages, Event types or Master pages, click the pencil icon in the relevant row. In the Infusionsoft Tag pop-up window, select the relevant tags and click Save.

   Note:

You can apply tags to all the Booking pages, Event types and Master pages defined in your OnceHub account. There are no limitations on the number of tags that can be applied and a single tag can be applied to Booking pages, Event types and Master pages.

Mapping OnceHub fields to Infusionsoft fields

Last Modified on Oct 18, 2022

The Infusionsoft connector setup wizard includes 5 steps: Creation, Classification, Tagging, Mapping, and Tracking. Only OnceHub Administrators can setup their Infusionsoft connector. To access the Infusionsoft connector setup wizard, select your profile picture or initials in the top right-hand corner → **Profile settings** → **CRM**.

Important:

You must be connected to your Infusionsoft account to be able to set up the connector.

The **Mapping** step includes default account-level mapping recommended by OnceHub and the option to map almost all OnceHub fields to Infusionsoft fields. You can further define your field mapping by adding an Event type-level mapping. This will override account-level mappings when the Event type is selected when customers make a booking.

Note that bookings are created based on the default Infusionsoft account date format (*mm/dd/yyyy*). If your Infusionsoft account is set to *dd/mm/yyyy*, make sure to switch the date format to in the Mapping step.

In this article, you will learn how to map OnceHub fields to Infusionsoft fields.

Note:

The same Infusionsoft field can be mapped to a OnceHub field in the account-level mapping and to multiple Event types in the Event type-level mapping. When a booking is made, the Infusionsoft field is mapped by default to the account-level field mapping, or to the Event type-level mapping when the mapped Event types are selected.

Default mapping

OnceHub fields are mapped to Infusionsoft fields by default. We do recommend to keep the mapping as-is and not to remove mapped data from the integration. This will enable you to gather the basic customer and booking data in Infusionsoft.

The Customer email and Subject fields are mandatory fields in the OnceHub Booking form and cannot be unchecked. However, you can choose to map them to different Infusionsoft fields.

Other OnceHub fields can be mapped to different Infusionsoft fields and are not mandatory. You can remove them from the mapping by unchecking each field.

Default mapping:

ScheduleOnce fields	Infusionsoft fields
Customer Email	Email (Contact.Email)
Meeting subject	Action Description (ContactAction.ActionDescription)
Calendar Event description	Creation Notes (ContactAction.CreationNotes)
Customer first Name	First Name (Contact.FirstName)
Customer last Name	Last Name (Contact.LastName)
Customer Company	Company (Contact.Company)
Customer Phone	Phone 1 – Work (Contact.Phone1)
State	State (Contact.State)
Country	Country (Contact.Country)

Adding new OnceHub fields

You can add any OnceHub fields and map them to Infusionsoft fields. This allows you to map any data tracked in OnceHub to Appointment or Contact records.

1. To add a OnceHub field to the mapping, click the Add OnceHub fields button.
2. Select the OnceHub fields you want to add and click Add fields. The OnceHub field list includes all System fields and Custom fields organized by categories.

   Important:

   OnceHub fields requiring Customer input must be set as mandatory fields on the Booking form. Otherwise, these fields will automatically be added to the Booking form at the time of the booking.

   Especially notable is the **Your company** OnceHub field, which must be added manually to your booking forms in order to map to the **Company (Contact.Company)** field in Infusionsoft.

   Learn more about editing Booking forms

   Learn more about adding Custom fields to the Booking form

3. In the Mapping step, select an Infusionsoft field from the drop-down list.

The Infusionsoft fields include all the fields stored in Infusionsoft (Custom and standard fields) that are the same field type as the selected OnceHub field. Learn more about the supported and non-supported Infusionsoft field types

Note:

There is a two-way mapping between Infusionsoft and OnceHub. For this reason, you can only map one OnceHub field to one Infusionsoft field.

-> OnceHub to Infusionsoft
When a booking is made, all data is mapped from OnceHub to Infusionsoft.
<- Infusionsoft to OnceHub
When scheduling with existing Infusionsoft contacts using Personalized links (Infusionsoft ID), Customer data is mapped from Infusionsoft to OnceHub in order to prepopulate or skip the Booking form.

Congratulations! You're done.

Embedding Infusionsoft tracking code to your Booking forms

Last Modified on Feb 11, 2020

The Infusionsoft connector setup wizard includes 5 steps: Creation, Classification, Tagging, Mapping, and Tracking. Only administrators can setup their Infusionsoft connector.

> **Important:**
>
> You must be connected to your Infusionsoft account to be able to set up the connector.

In the Tracking step, you simply embed the Infusionsoft tracking code into your Booking forms. The Infusionsoft tracking code helps you optimize your Booking forms by capturing visitor activity and making it available for analysis in Infusionsoft. The tracking applies only to the traffic on the Booking forms of Booking pages owned by connected Users.

The traffic analyzed from your Booking forms includes:

1. Visitors on your Booking forms who leave your Scheduling solution without submitting the form
2. Visitors on your Booking forms who book an appointment with you. In this case, an Infusionsoft Contact and Appointment are created or updated.

> **Important:**
>
> The Infusionsoft tracking code does not track any visitor activity on steps that precede the booking form.

In the Infusionsoft Web Analytics report, you have access to comprehensive data for each Booking form:

- **Views**: A view is counted each time a booking form loads. The same visitor may accumulate multiple views by refreshing their browser.
- **Unique visitors**: A unique visitor is counted and a visitor record is created for each anonymous person who views a Booking form. A visitor is identified by cookie and IP address. This metric tells you if your advertising and referral sources are effective at generating traffic to your Booking page.
- **Unique contact:** A unique contact is counted for each visitor who booked a meeting and is now a contact in your Infusionsoft database. If the difference between the Unique contact and Unique visitors is high, you should consider simplifying the Booking form as it might be the reason why visitors do not complete a booking.
- **Unique customer:** A unique customer is counted for each visitor who has purchased a product or service through the Infusionsoft e-commerce tools. This metric is not relevant for your Scheduling solution.
- **Average view time**: The average view time is calculated by adding the total amount of time spent on the Booking form and dividing it by the number of unique visitors. This metric should indicate how long visitors spend filling out the Booking form before booking.

Visitor data is tracked as long as a visitor is actively engaging with your Booking page. Aggregated visitor data is available through the Web Analytics reports in Infusionsoft. Learn more about Infusionsoft visitor tracking

Supported and non-supported Infusionsoft field types

Last Modified on Oct 18, 2022

In the Mapping step of the Infusionsoft setup wizard, you can map OnceHub fields to Infusionsoft fields. For each OnceHub field, the system will only show Infusionsoft fields that correspond to the selected OnceHub field type.

The system will only show fields that are supported by the integration. Non-supported fields will not be included in the Infusionsoft or OnceHub field lists.

OnceHub fields

1. **Supported OnceHub field types**
   Our Infusionsoft integration supports all OnceHub field types, except for checkboxes. It means that almost all OnceHub System and Custom fields can be mapped to Infusionsoft fields in Mapping step of the Infusionsoft setup page.
2. **Non-supported OnceHub field types**

   The only non-supported OnceHub field type is checkbox. It means that the default Custom field - *Terms of Service* and any additional checkbox Custom fields that you have created cannot be mapped to Infusionsoft fields.

   The checkbox field type will not appear in the Mapping step of the Infusionsoft setup page.

Infusionsoft fields

1. **Supported Infusionsoft field types**

   The Infusionsoft integration supports most Infusionsoft field types. Below are the supported Infusionsoft field types that can accept data from OnceHub:

Infusionsoft field type	Infusionsoft field type description
Date	Stores a custom date. Use date fields to track event dates (i.e workshop, appointment, renewal), merge the date into follow-up communications, and to schedule steps within a sequence. *Note: The date picker calendar icon does not show up on web forms.*
Date and Time	Stores a custom date and time that can be merged into follow-up email, letter, and task templates. It is also used to schedule steps within a sequence. *Note: The sequence steps are scheduled based on the date only (not the time).*
Email address	Stores an additional email address with a "send email" icon. Use this field to add more than 3 email addresses to a contact record.
Name	Similar to a text field, but designed to be like the standard first and last name fields. It allows you to search by first or last name. You can create two of these; one for first name and one for last name if you want even more flexibility in your search.
text	Stores all types of data (letters, numbers, and symbols), but is limited to 255 characters. It is best used for short-answer input.
Text area	Stores all types of data (letters, numbers, and symbols). Allows for about 65,000 characters, which is about 9,000 English words. It is often used to capture open ended feedback from a web form (i.e. survey or contact us).
Phone number	Converts a number to U.S. phone number format - (XXX) XXX-XXXX. Use this field to add more than 5 phone numbers to a contact record.
Website	Converts a website address into a hyperlink for one-click access to the website listed. The hyperlink works with or without http://.

2. **Non-supported Infusionsoft field types**

   Non-supported Infusionsoft field types will not appear in the Mapping step of the Infusionsoft setup. You won't be able to map OnceHub fields to Infusionsoft fields of the following types:

Infusionsoft field type	Infusionsoft field type description
Whole Number	Stores whole numbers only. It will not accept letters, symbols, or decimal points.
Social security Number	Converts a number to the U.S. Social Security number format - XXX-XX-XXX. The Social Security number field is encrypted. After the number is added, your users will only be able to view the last 4 digits.
Decimal Number	Stores decimal numbers. It will not accept letters or symbols. The decimal will round to the hundredths.
Percent	Stores any number, but displays it with a decimal point and a percentage (%).
Currency	Stores any number, but displays it with a decimal point and a dollar sign ($).
Drilldown	Creates a drop-down list that has multiple main categories with multiple subcategories.
List Box	Creates a list of options. The list box permits multiple selections when a user or website visitor holds down the CTRL key on their keyboard.
Day of Week	Stores the name of a day in text format (i.e. Monday)
Month	Stores the name of a month in text format (i.e. January).
Year	Enter a year in numerical format (i.e. 2011).
Radio	Creates radio button options that all display at once. Only one option can be selected at a time.
Yes / No	This is a radio field that only has 2 options: Yes or No.
Dropdown	Creates a dropdown list with a limited number of options. The user must click on the list to view and select from the options. Only one option can be selected at a time. You can add up to 499 items in each dropdown list.
State	Creates a U.S. state dropdown in the contact record.

Connect Zapier to OnceHub

Last Modified on May 21, 2024

Zapier is an iPaaS (Integration Platform as a Service) that enables quick and simple data movement between applications.

The platform is connected to more than 1000 applications in many categories, including CRM, invoicing, productivity, email marketing, and more. OnceHub is part of the Zapier app community, allowing you to easily push Customer and Booking data to your favorite apps.

The OnceHub connector for Zapier

Once you register with Zapier, you can create Zaps.

Zaps are workflow automations linking two or more apps, through Triggers and Actions. Each Zap is triggered by an event in one app, and automatically completes an Action in a second app using the data collected from the Trigger. For example, you can set up a Zap that creates or updates a contact in your CRM every time a new booking is made via OnceHub.

OnceHub provides **ten Zapier triggers** for OnceHub activity. They are divided into two groups: specific and composite. Learn more about the OnceHub triggers on Zapier

To get started with Zapier, you will need to create a Zapier account and then generate a Zapier API key in OnceHub.

Generate your Zapier API key

To trigger Zaps from your OnceHub account, you must first generate a Zapier API key in OnceHub. Once you generate your key, you can create Zaps using OnceHub as a Trigger.

To generate your Zapier API key in OnceHub:

1. Go to your account settings by clicking the gear icon at the top right-hand corner → click **Zapier**.
2. Select the **API key** tab and click the **Generate API Key** button. OnceHub will create your unique API key (see *Figure 1*).
3. When you create your first Zap, simply copy your API key and OnceHub Login ID from OnceHub (see *Figure 1*).

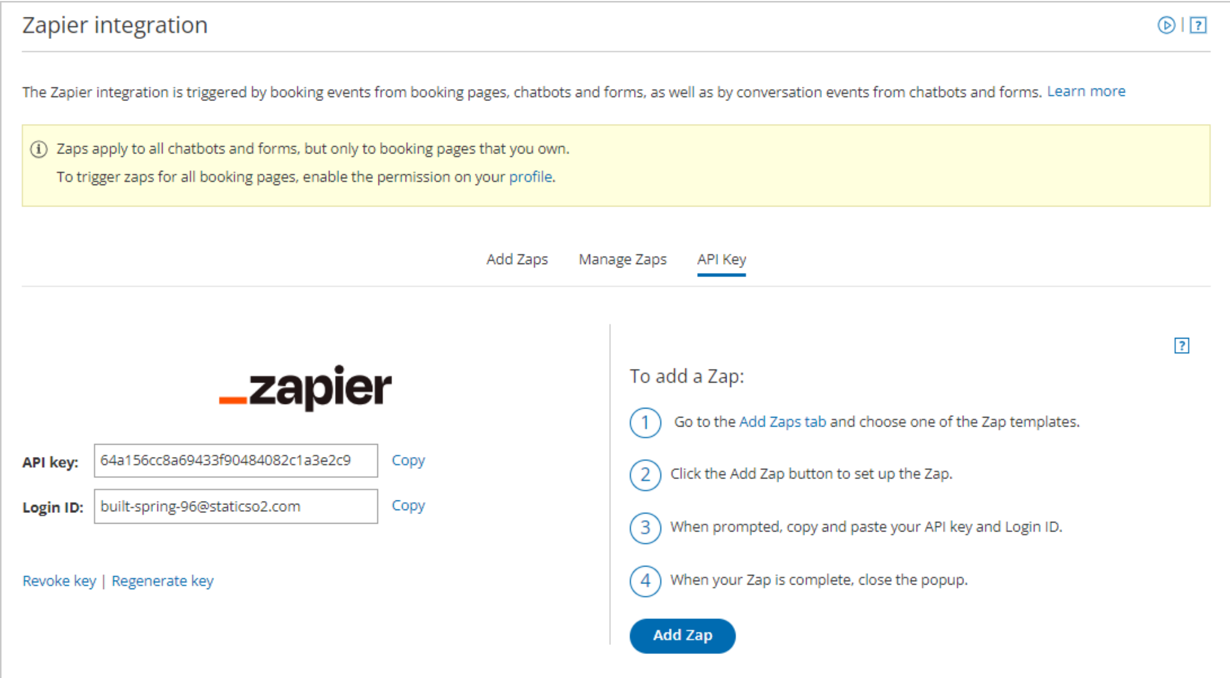


Figure 1: API key generated

4. Next, paste the copied credentials into the Zapier authentication page

Congratulations! Your Zapier API key is ready and you can start creating Zaps with OnceHub as a Trigger.

Important:

If you revoke or regenerate your Zapier API key, or change your OnceHub Login ID, you will need to reconnect OnceHub to Zapier. To reconnect, log into Zapier, go to Connected Accounts and reconnect OnceHub using the new credentials.

Once you generate your Zapier API key, you are ready to create Zaps for integrating OnceHub with your chosen applications.

Creating Zaps

Note:

By default, your Zaps can only be triggered from Booking pages you own. OnceHub administrators can trigger Zaps from pages not under their ownership by enabling a permission in their User profile. Learn more about triggering Zaps from pages not under your ownership

OnceHub offers many Zap templates with more than 35+ applications, giving you access to pre-defined workflows for recommended use-cases. Our templates provide you with a guided setup experience with pre-filled options and fields, so you don't have to create Zaps from scratch in the Zap Editor.

You can find all the OnceHub Zap templates in your OnceHub account. In OnceHub, simply search the specific apps with which we have templates, and click to add the Zap you require. Learn more about adding Zaps from within OnceHub

If you do not find a Zap template that suits your exact scenario, you can also create your Zaps from scratch in Zapier with any of the 1000+ apps connected.

Create and manage Zaps from OnceHub

Last Modified on May 21, 2024

The OnceHub connector for Zapier allows you to add Zaps directly from within your OnceHub account. This can be done using ready-made Zap templates, or by creating Zaps from scratch.

Note:

If you joined OnceHub on or after May 2024, your experience will be slightly different to that described below.

The key differences will be:

- Only account administrators will be able to create and configure Zaps. Member users will not be able to set up and configure Zaps.
- Zaps will apply to all scheduling tools; i.e., a Zap set up for a booking calendar will apply to all active booking calendars on the account. The same is true for booking pages, chatbots, and routing forms.
- Instead of having a Login ID, users will now use an Account ID generated by OnceHub when linking OnceHub and Zapier accounts.

Whether you are a new user or an existing user, Zapier integration settings can now be found in **Account settings** as opposed to profile settings.

Adding a Zap from within OnceHub

1. Log into your OnceHub account.
2. Go to your account settings by clicking the gear icon at the top right-hand corner → click **Zapier**, and select the **Add Zaps** tab. Here, you can search for apps with Zap templates to connect with OnceHub. By default, the **Popular Zaps** category is selected, showing you the most popular Zaps used by OnceHub Users (Figure 1).

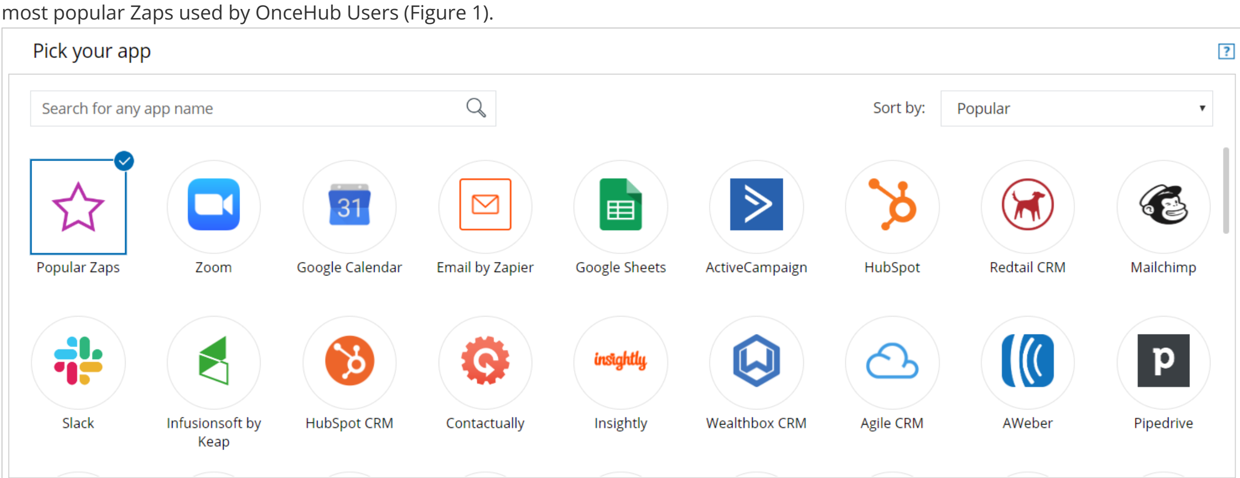


Figure 1: The Add Zaps tab with the Popular Zaps category selected

3. Filter the Zaps shown by selecting one or more apps in the Search area. The Zap templates are displayed below the Search area, listed by popularity by each selected app (see Figure 2).

Note:

To find a specific app, you can type the app name in the Search bar. You can also sort the list of apps by popularity or alphabetically (see Figure 2).

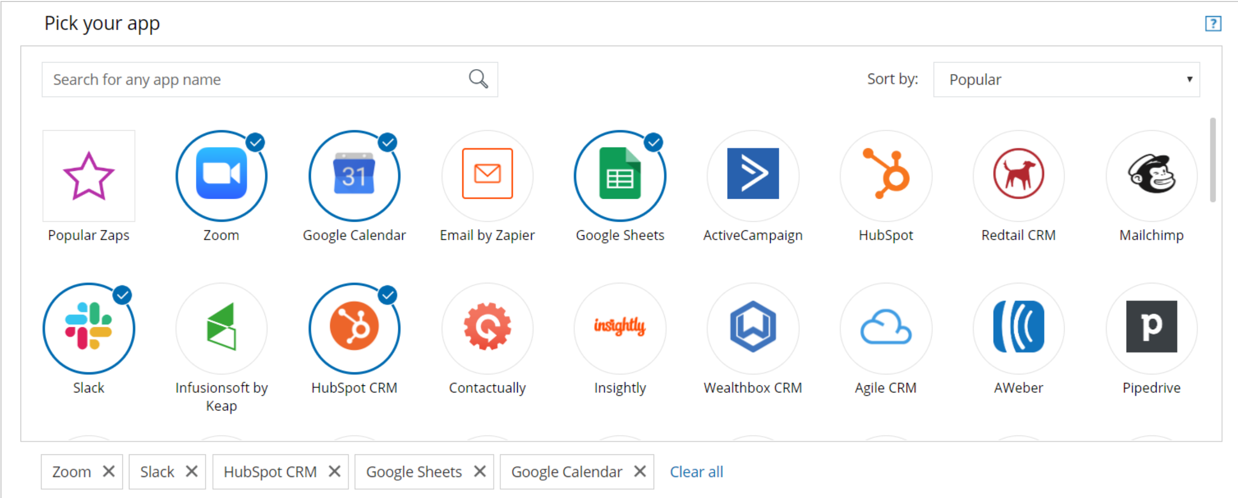


Figure 2: Selecting specific apps

4. Click the **Add Zap** (Figure 3) button to add a Zap or to see a detailed description of the template. The Zap Editor will open in OnceHub, allowing you to customize the Zap (see Figure 4).

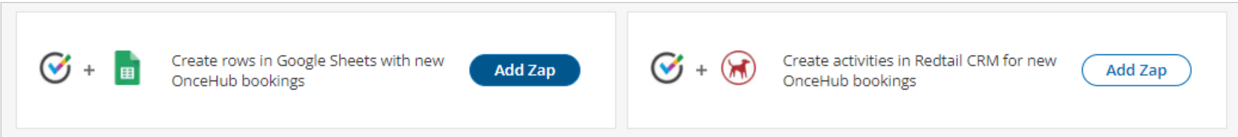


Figure 3: The Add Zap button

5. To add the template to your account click **Create this Zap** (see Figure 4). If you are not already logged in to Zapier or have not yet signed up for a Zapier account, you will be asked to log in or sign up at this stage.

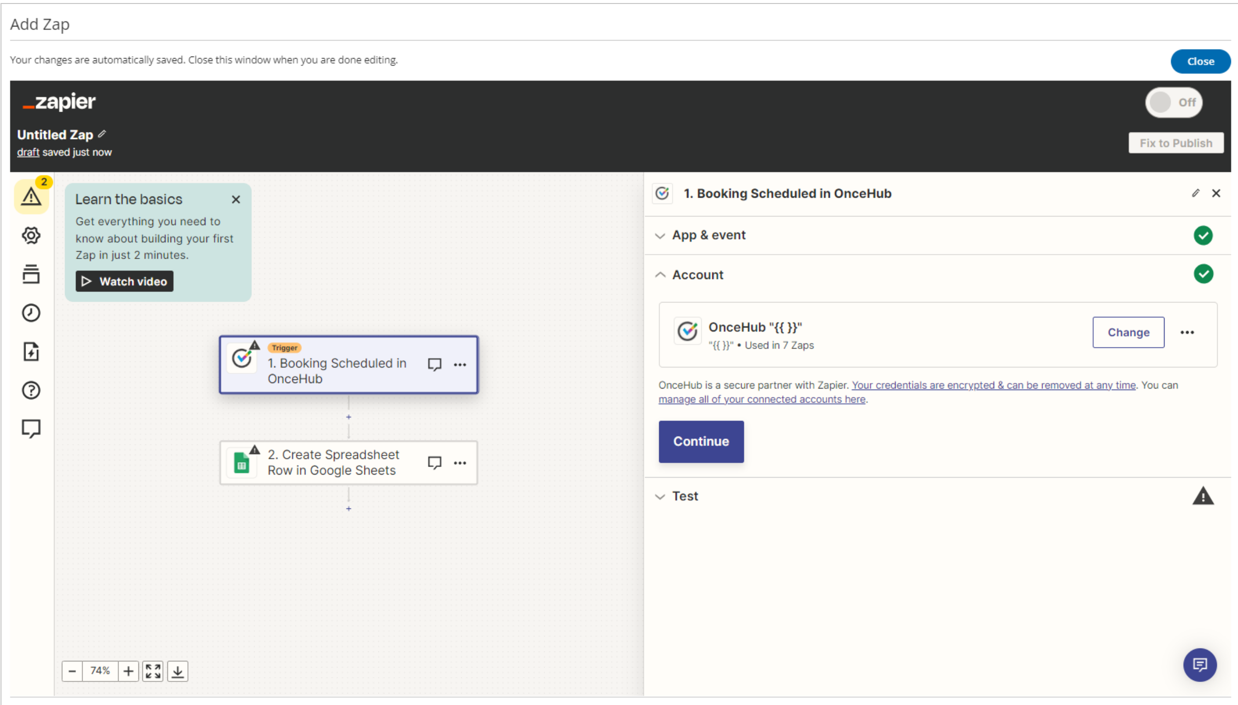


Figure 4: The Zap editor

6. Select a OnceHub account. If you have already connected OnceHub with Zapier, simply select the account (see Figure 5). Make sure to test the connection by clicking the **Test** button (bottom of Figure 5).

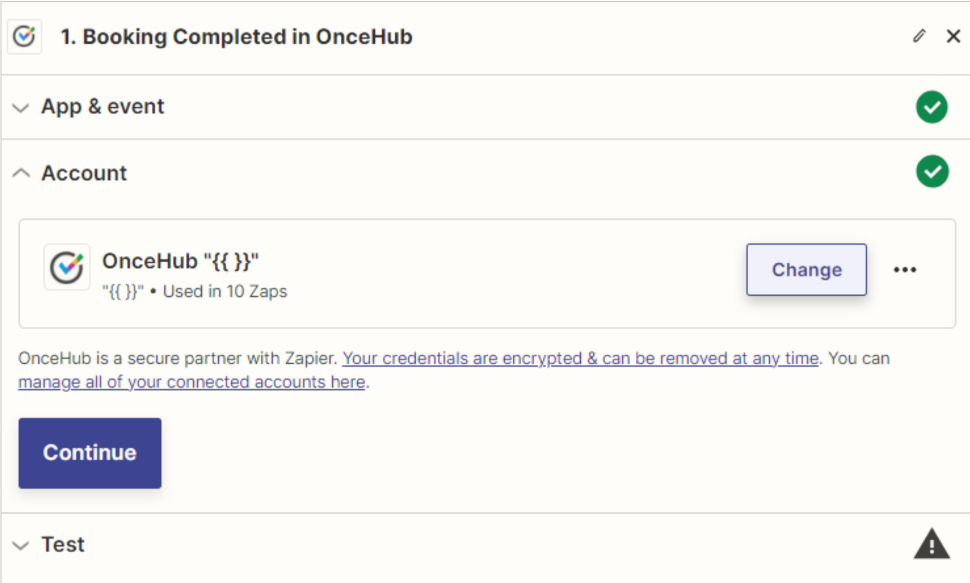


Figure 5: Selecting your OnceHub account

7. If you have not connected an account, or want to connect a different account, click on the **Connect an Account** button to establish a new connection. You will be asked to provide your Zapier **API Key** and **OnceHub Login ID** in the Zapier authentication page.
8. Click the link to open your OnceHub account in a new browser tab. Copy your **API key** and **Login ID** from the **API Key** tab in the OnceHub Zapier integration page (see Figure 6).

Figure 6: Your Zapier API key and Account ID

9. Once connected, click **Save + Continue** in the Zap Editor (see Figure 8).
10. Test the OnceHub trigger. First, make sure you have an existing booking in your connected OnceHub account. If not, you can make a test booking by opening your Booking page in a new browser tab. Once you have at least one booking, click **Fetch & Continue** to test the trigger.
11. Once the test is successful, click **Continue**.

Note:

You can add a Filter step to more accurately define when to trigger this Zap. For example, you can define a filter that states only specific booking events (e.g. "Scheduled" and "Rescheduled") or specific Bookings pages will trigger the Zap. Learn more about adding a Filter step in Zapier

12. Select an account for your Action app (see Figure 7). If you have already connected your account with Zapier, simply select the account. Make sure to test the connection by clicking the **Test** button. If you have not connected an account or want to connect a different account, click the **Connect an Account** button to establish a new connection. Once connected, click **Save + Continue**.

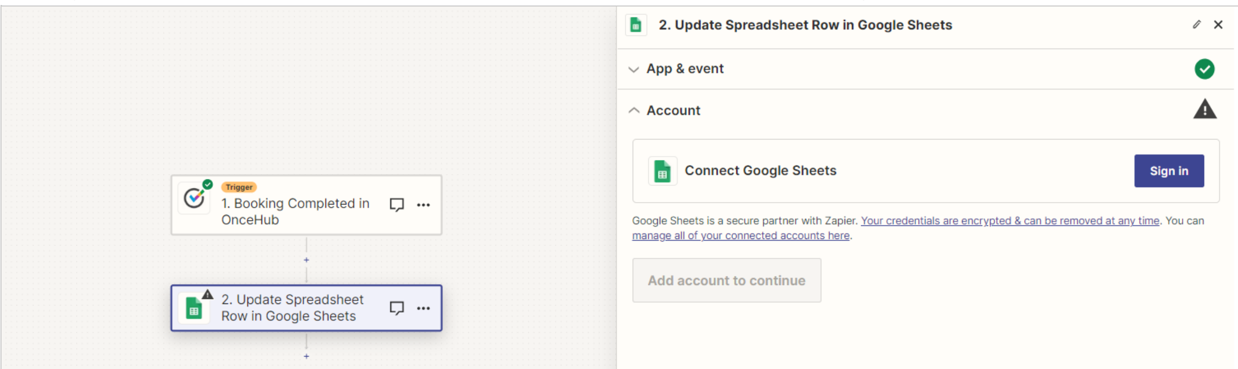


Figure 7: Selecting an account for the Action app

13. Set up the Action by filling in the fields (see Figure 8). Some fields require you to select values from the Action app, while other fields require you to use your own text and/or values from OnceHub fields. Click on a field's drop-down to see which options are available. Use the Search bar at the top of the dropdown to search for a specific field. Values from OnceHub fields will be dynamically updated with the relevant booking data and customer data each time the Zap is triggered. In the example below, you have to choose a Google Sheet for Zapier to populate.

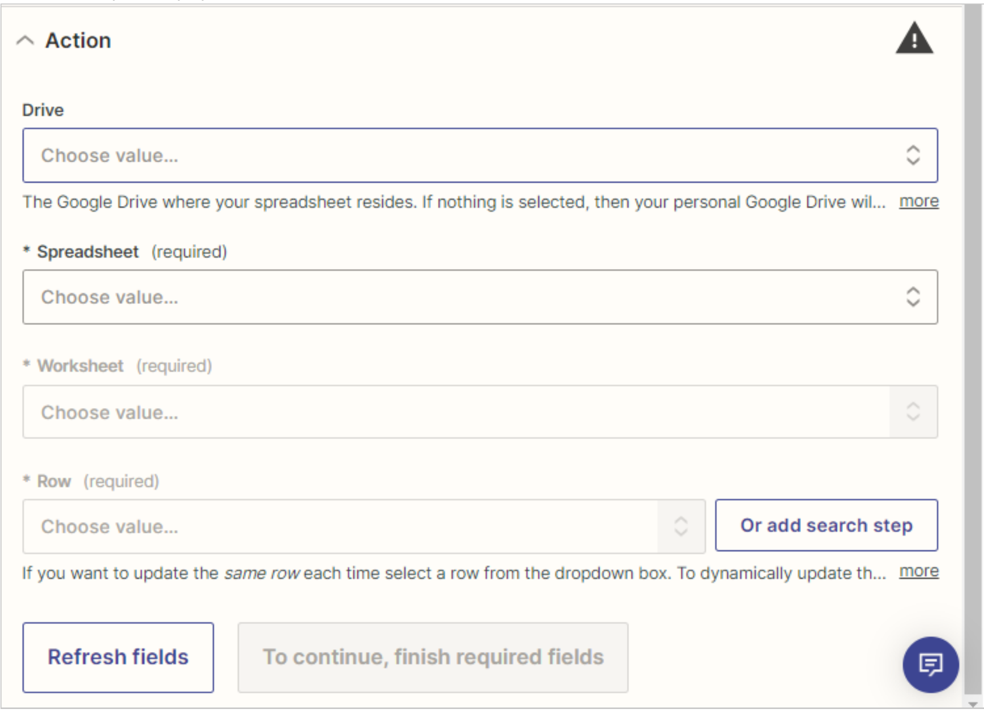


Figure 8: Filling in the Action fields

14. Test the Action step by following the instructions (see Figure 9). Once you are done testing, you can either add another step or click **Publish** to complete the Zap (see Figure 10).

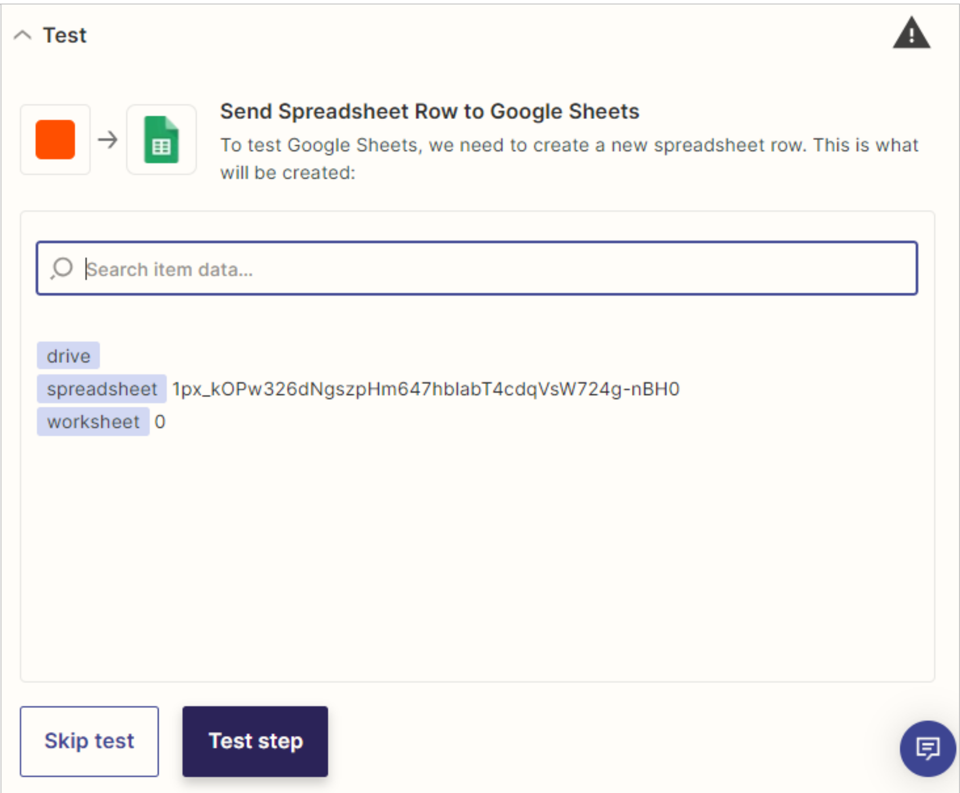


Figure 9: Testing the Action step

15. Publish your Zap (see Figure 10).

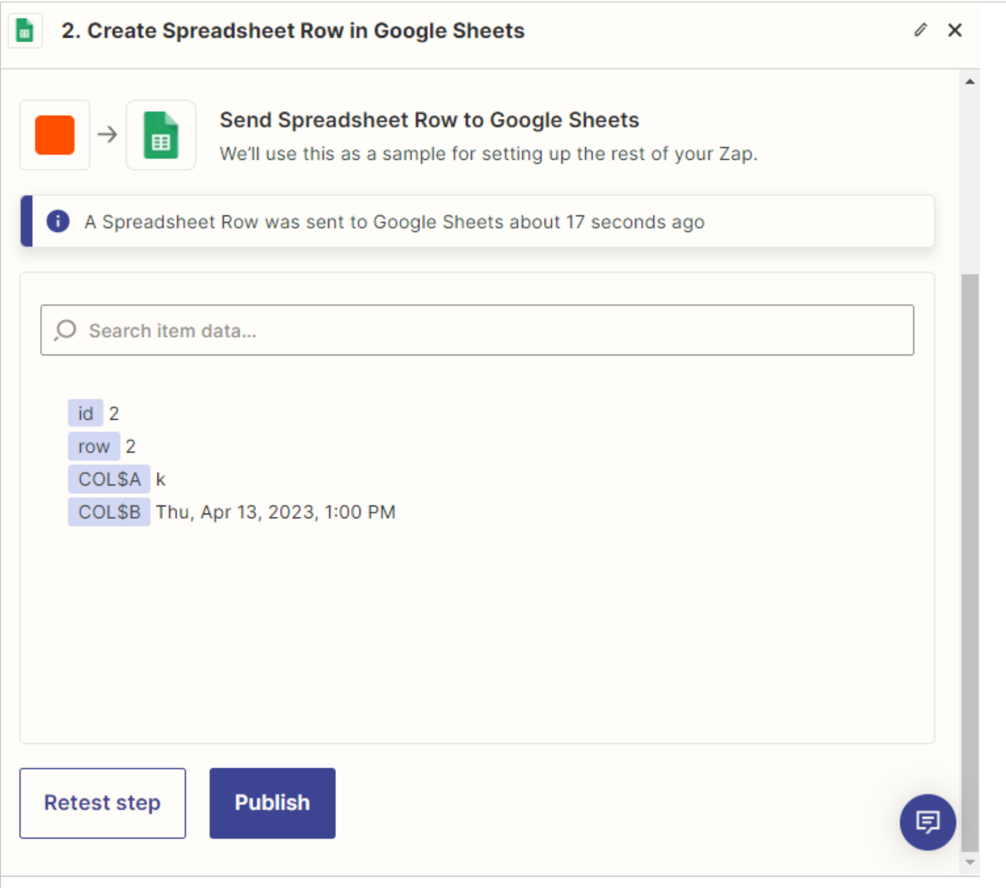


Figure 10: Publishing your Zap

Congratulations! You are done. Your Zap is active and your workflow is automated. You can now close the Add Zap popup and return to browsing Zap templates in OnceHub.

Note:

By default, Zaps are only triggered from Booking pages you own. OnceHub administrators can be allowed to trigger Zaps from pages not under their ownership by enabling the **Trigger Zaps from all Booking pages** permission in the Administrator's profile. Learn more about triggering Zaps from pages not under your ownership

If none of the ready-made Zaps suits your exact scenario, you can also create your own Zaps from scratch in Zapier with any of the 1,000+ apps connected. Learn how to do this by reading on in this article.

Managing Zaps from within OnceHub

The OnceHub connector for Zapier allows you to manage your OnceHub Zaps from within the comfort of your OnceHub account. OnceHub communicates with the Zapier API to retrieve a list of your OnceHub Zaps and their statuses.

Requirements:

To access your OnceHub Zaps from within OnceHub, you need a Zapier account.

Note:

- From within OnceHub, you can only access your OnceHub Zaps. Your non-OnceHub Zaps are not accessible via the Zapier API.
- If you have a Zapier Team account, you will see Zaps from both your Zapier Personal account and team-shared Zaps in your OnceHub account.

Managing your OnceHub Zaps

To access your OnceHub Zaps:

1. Select your profile picture or initials in the top right-hand corner → **Profile settings** → **Zapier**.
2. Select the **Manage Zaps** tab and click **Connect** (*see Figure 1*).

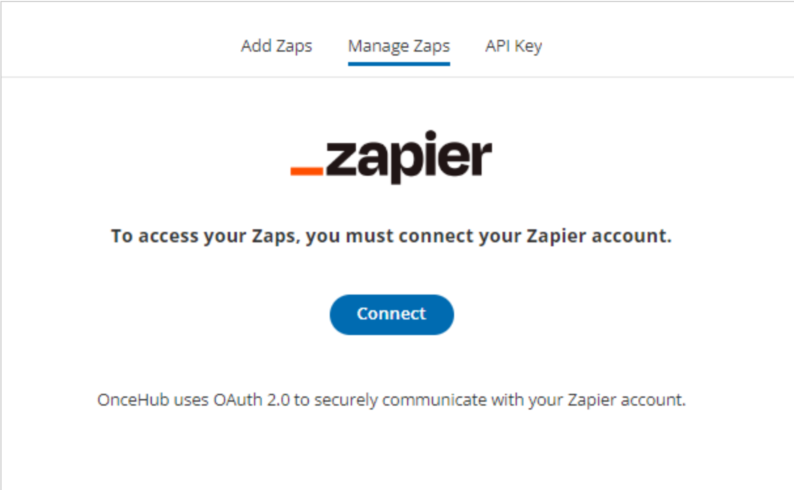


*Figure 1: The **Manage Zaps** tab*

3. In the Zapier login page, enter your Zapier email and password, and click **Login**.
4. In the Zapier consent screen (*see Figure 2*), click **Authorize** to allow OnceHub to list your Zaps and their statuses. You will be redirected back to OnceHub.

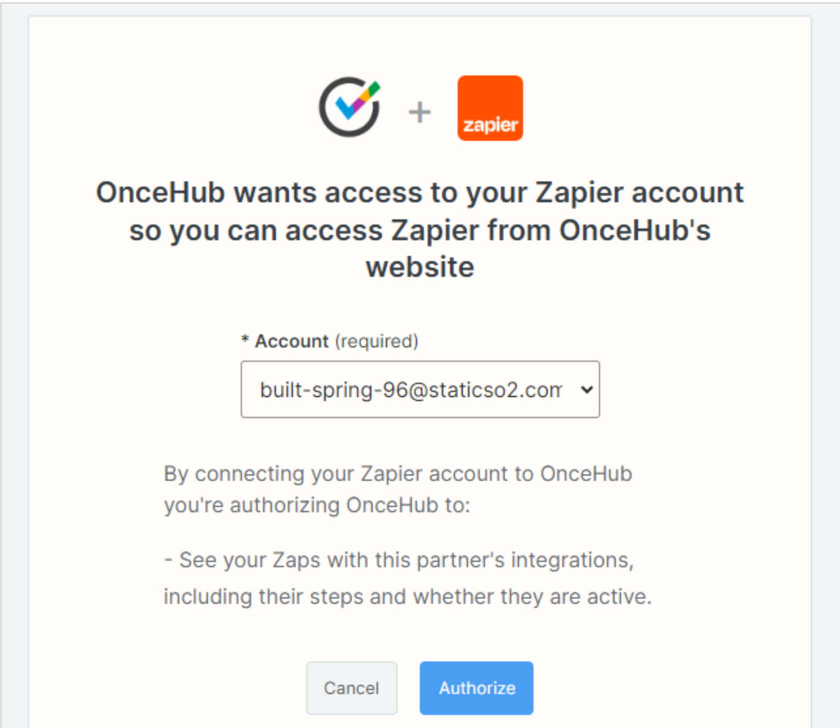


Figure 2: Zapier consent screen

5. Once connected, you can view your OnceHub Zaps (*see Figure 3*).

   A Zap can be in one of the following states:

   On: The Zap is active and performing the action when triggered.

   Off: The Zap is complete but inactive. Turn on to use this Zap.

   Draft: The Zap is incomplete. Finish setup to activate this Zap.

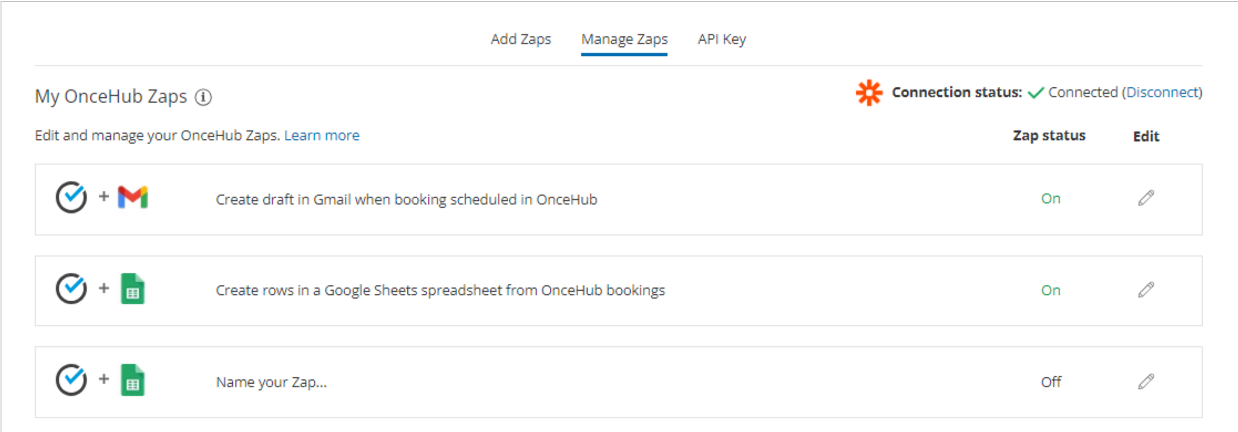


Figure 3: Your OnceHub Zaps

6. To edit a Zap, click the pencil icon ( ) to open the Zap Editor (*see Figure 4*).

In the Zap Editor, you can make any changes, including turning the Zap ON or OFF. Changes are automatically saved.

Note :

To delete a Zap, click on **Dashboard** within the Zap Editor (see *Figure 4*). Your Zapier account will open in a new browser tab. Locate the Zap and select **Trash** in the Zap's menu.

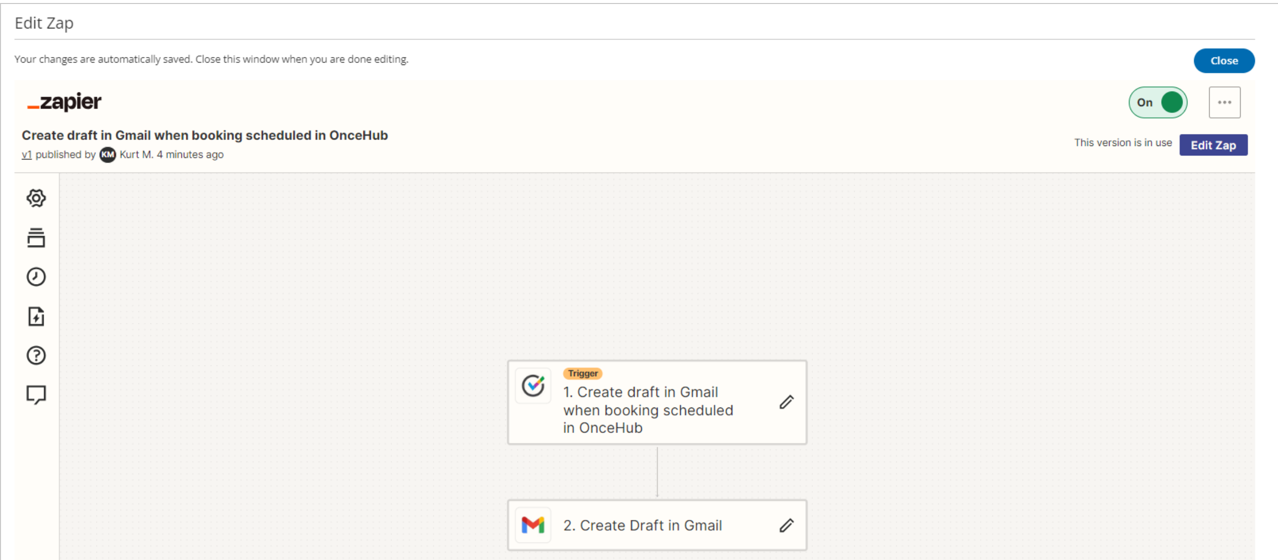


Figure 4: The Zap Editor from within OnceHub

7. When finished, simply close the overlay popup.

Congratulations! You can now manage your OnceHub Zaps from within OnceHub.

Triggering Zaps from pages not under your ownership

By default, you can only trigger Zaps from Booking pages you own. If you're a OnceHub Administrator, you can remove this restriction for yourself and for other Administrators in the account.

When Zap triggering from all Booking pages is enabled for an Administrator, the Administrator's active Zaps will be triggered by booking events that occur on all Booking pages in the account effective immediately.

To limit your Zaps to specific Booking pages, add a Filter step to your Zaps before enabling the permission to trigger Zaps from all Booking pages.

Important:

Allowing an Administrator to trigger Zaps from pages owned by other Users means that you are giving this Administrator access to booking data and Customer data from all Booking pages in the account.

When Zap triggering from all pages is enabled, and other Users in the account are also connected to Zapier, there is a risk of duplicate or conflicting actions. For example, Customers may receive duplicate notifications. We recommend reviewing the Zaps of all connected Users before enabling this permission.

Requirements

To enable Zap triggering from all booking pages:

- You must be a OnceHub Administrator. This permission is User-based and can only be granted to Administrators.
- The Administrator for which the permission is enabled must have a Zapier API key.

Enabling Zap triggering from all pages

1. Sign in to OnceHub.
2. Select your profile picture or initials in the top right-hand corner → **Profile settings** → **Permissions.**
3. Check the box **Trigger Zaps for all booking pages** and click **Save.**
4. In the Trigger Zaps from all booking pages pop-up, click **Yes**. Active Zaps will immediately apply to all booking pages in the account.

Creating Zaps using OnceHub as a Trigger

How to create a Zap using OnceHub as a Trigger

There are two ways to create a Zap using a OnceHub trigger:

1. **Use one of the Zap templates available to you within OnceHub**

   OnceHub offers many Zap templates with more than 35+ applications, giving you access to pre-defined workflows for recommended use-cases. Our templates provide a guided setup experience with pre-filled options and fields, so you don't have to create Zaps from scratch in the Zap Editor.

   You can set up Zap templates directly from within your OnceHub account (see *Figure 1*). Simply search the specific apps with which we have templates, and click to add the template you require.

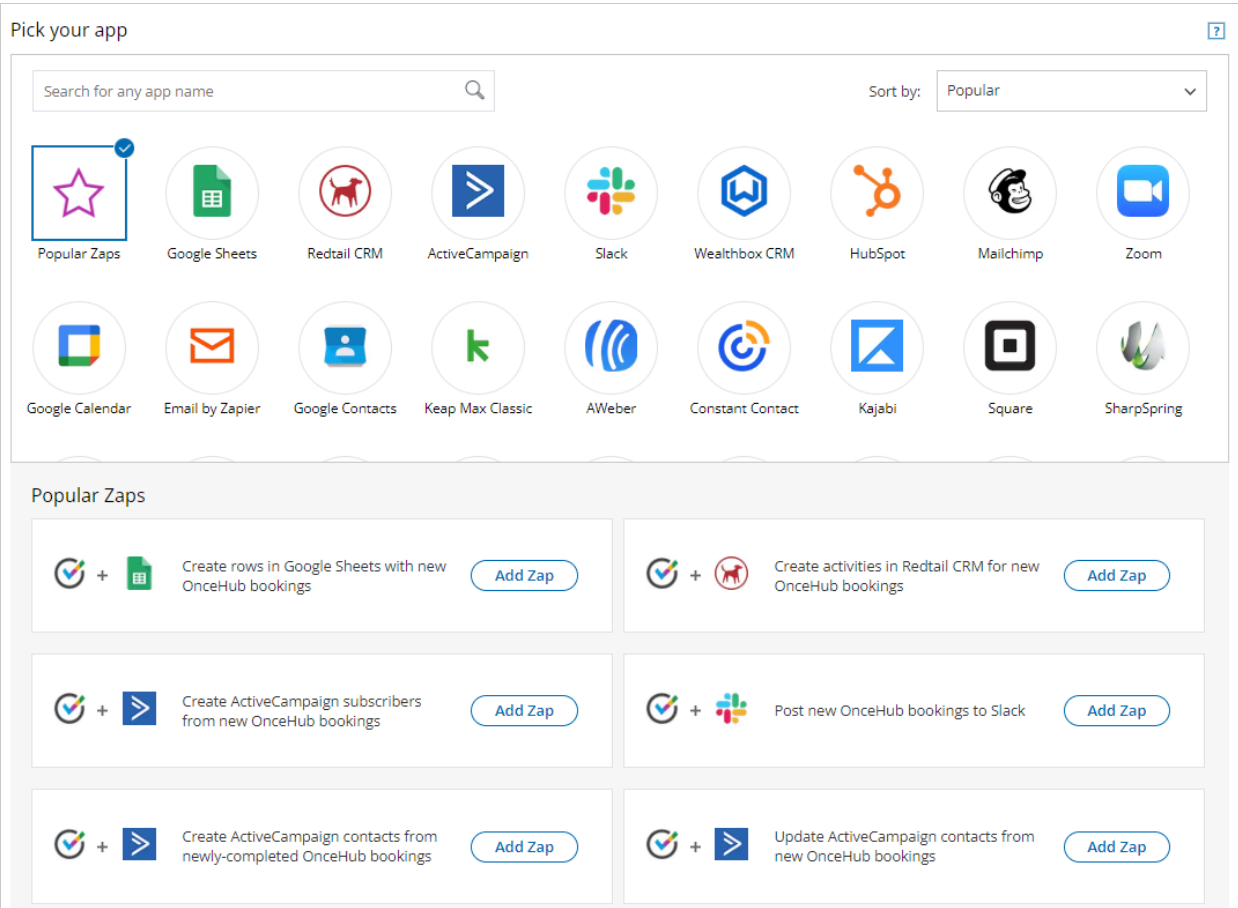


Figure 1: Add Zaps within OnceHub

2. **Create a Zap from scratch in Zapier**

   If none of the Zap templates suit your exact scenario, you can create your own Zaps from scratch in Zapier (see *Figure 2*). This allows you to connect OnceHub with more than 1000 apps.

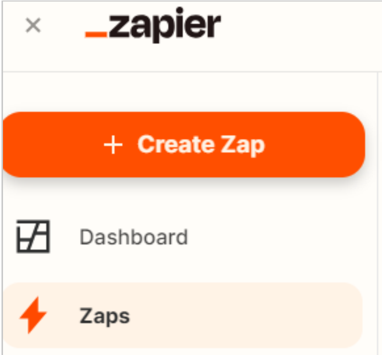


   Figure 2: Click ***Create Zap*** *to create a Zap from scratch*

How to create a Zap from scratch in Zapier

Note:

You can add a Filter step to more accurately define when to trigger this Zap. For example, you can define a Filter that allows the Zap to continue only when specific Bookings pages are used or when specific booking events occur (e.g. **Scheduled** and **Rescheduled**).

1. Log in to Zapier, go to your **Dashboard** and click the **MAKE A ZAP!** button (see Figure 1).

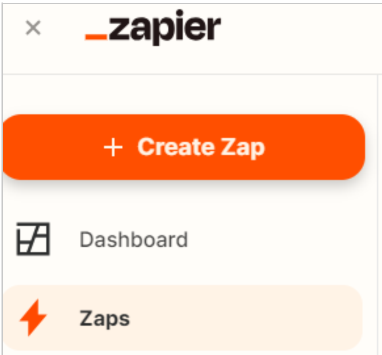


   Figure 1: Click the Create Zap button

2. Choose OnceHub as the trigger app. Type “oncehub” in the **Choose a Trigger app** field, and select **OnceHub** from the drop-down list.
3. Select a OnceHub trigger. Learn more about the OnceHub triggers on Zapier
4. Select a OnceHub account. If you have already connected your OnceHub account with Zapier, simply select the account. Make sure to test the connection by clicking the **Test** button.
5. If you have not connected an account, or want to connect a different account, click on the **Connect an Account** button to establish a new connection. You will be asked to provide your Zapier API key and OnceHub login ID.
6. Click the link to open your OnceHub account in a new browser tab and copy your API key and Login ID shown in the API key tab in the Zapier integration page in OnceHub (see Figure 2).

   Figure 2: Copy your ***API key*** *and* ***Login ID*** *from OnceHub*

7. Once connected, click **Continue**.
8. Test the OnceHub trigger. First, make sure you have an existing booking in your connected OnceHub account. If not, you can make a test booking by opening your Booking page in a new browser tab. Once you have at least one booking, click **Fetch & Continue** to test the trigger.

9. Once the test is successful, click **Continue**.
10. Choose an Action App with which to integrate OnceHub (see Figure 3).

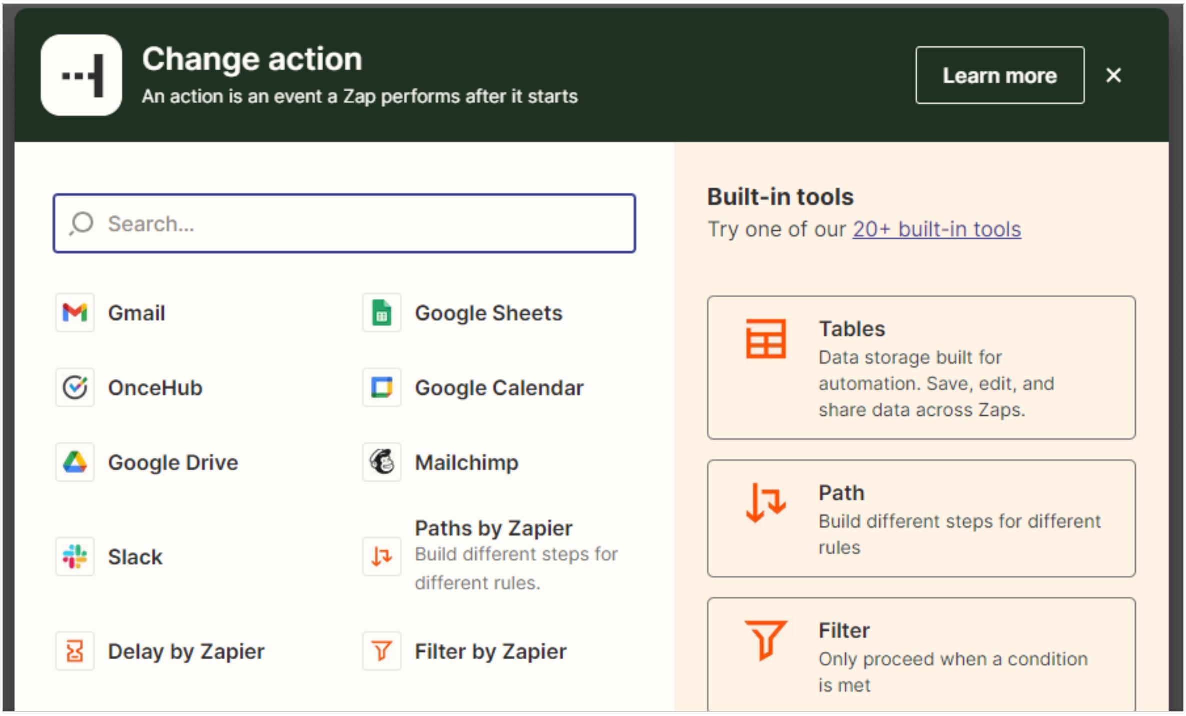


Figure 3: Choose an Action App

11. Select the Action you want to occur when the Zap is triggered and click **Continue** (see Figure 4).

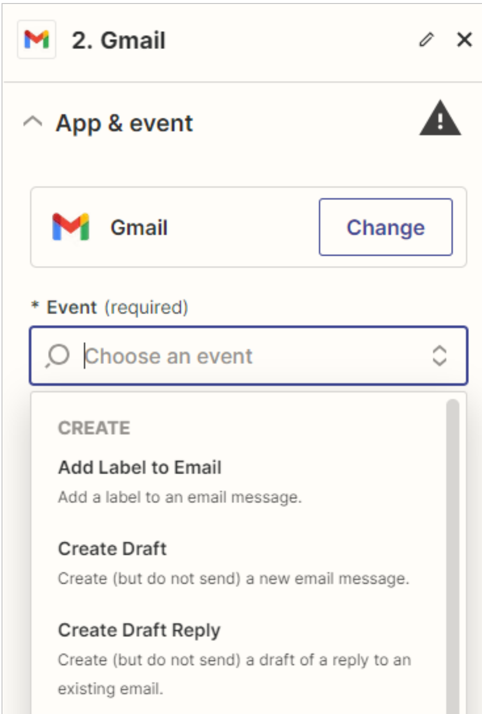


Figure 4: Select the Action

12. Select an account for your Action app. If you have already connected your account with Zapier, simply select the account as shown below. Make sure to always test the connection by clicking the **Test** button. If you have not connected an account or want to connect a different account, click the **Connect an Account** button to establish a new connection. Once connected, click **Save + Continue**.
13. Set up the Action by filling in the fields. Some fields require you to select values from the Action app, while other fields require you to use your own text and/or values from OnceHub fields. Click on a field's drop-down to see which options are available. Use the Search bar at the top of the dropdown to search for a specific field. Values from OnceHub fields will be dynamically updated with the relevant booking data and customer data each time the Zap is triggered. In the example below, OnceHub's **Customer – Email** field is used as the value for the **Subscriber Email** field in MailChimp, the Action app. Learn more about the OnceHub fields available in Zapier
14. Test the Action step by following the instructions. Once you are done testing, you can either add another step or click **Finish** to

complete the Zap.

15. Turn on your Zap. If you haven't named your Zap yet, you can name it on this screen (see Figure 5).

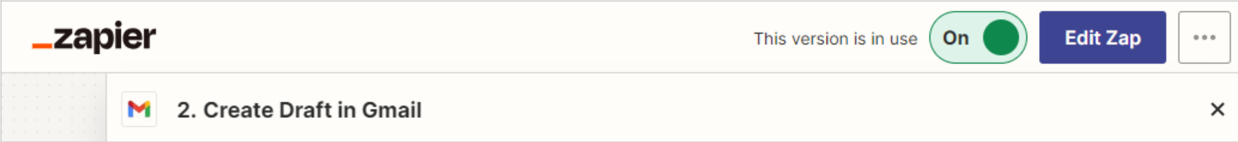


Figure 5: Editing/publishing your Zap

16. Congratulations! You are done. Your Zap is active and your workflow is automated.

> **Note:**
>
> By default, Zaps are only triggered from Booking pages you own. OnceHub Administrators can be allowed to trigger Zaps from pages not under their ownership by enabling a permission in the Administrator's profile.

How to add a Filter step to a Zap in Zapier

A Filter is an optional step in a Zap that allows you to control when a Zap is triggered. You can define rules that state whether the Zap Action should be performed. For example, if you have multiple Booking pages, you can define a filter that states the Zap should only be triggered on specific Booking pages. Another option is to create filters that state the Zap should only be triggered upon specific booking events (e.g. **Scheduled** and **Rescheduled**).

In this article, we will review two examples in which a Filter can be useful: filtering by booking lifecycle phase and by Booking page. Filtering by booking lifecycle phase is useful if you only want specific types of lifecycle events to trigger your Zap.

Filtering by booking lifecycle phase when using the Booking Lifecycle Event trigger

When using the **Booking Lifecycle Event trigger**, a Zap is triggered every time the status of one your bookings changes. The following statuses, or lifecycle events, can trigger a Zap: Scheduled, Rescheduled, Canceled, Completed, and No-show.

Without filtering, this trigger will create a new record every time a booking is canceled or completed. If you wish to prevent this, you should limit the trigger by filtering it. Below are the steps to set up this filter:

1. Log in to Zapier, go to **Zaps**, and click on the Zap you want to edit.
2. Add a Filter step by clicking on the **+** symbol on the left panel in the Zapier Editor (see Figure 1).

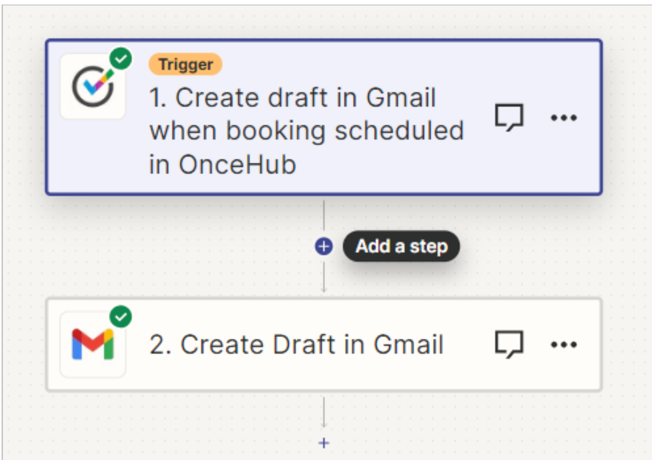


Figure 1: Add a Filter step

3. Click on the **Filter** button to add the Filter (see Figure 2).

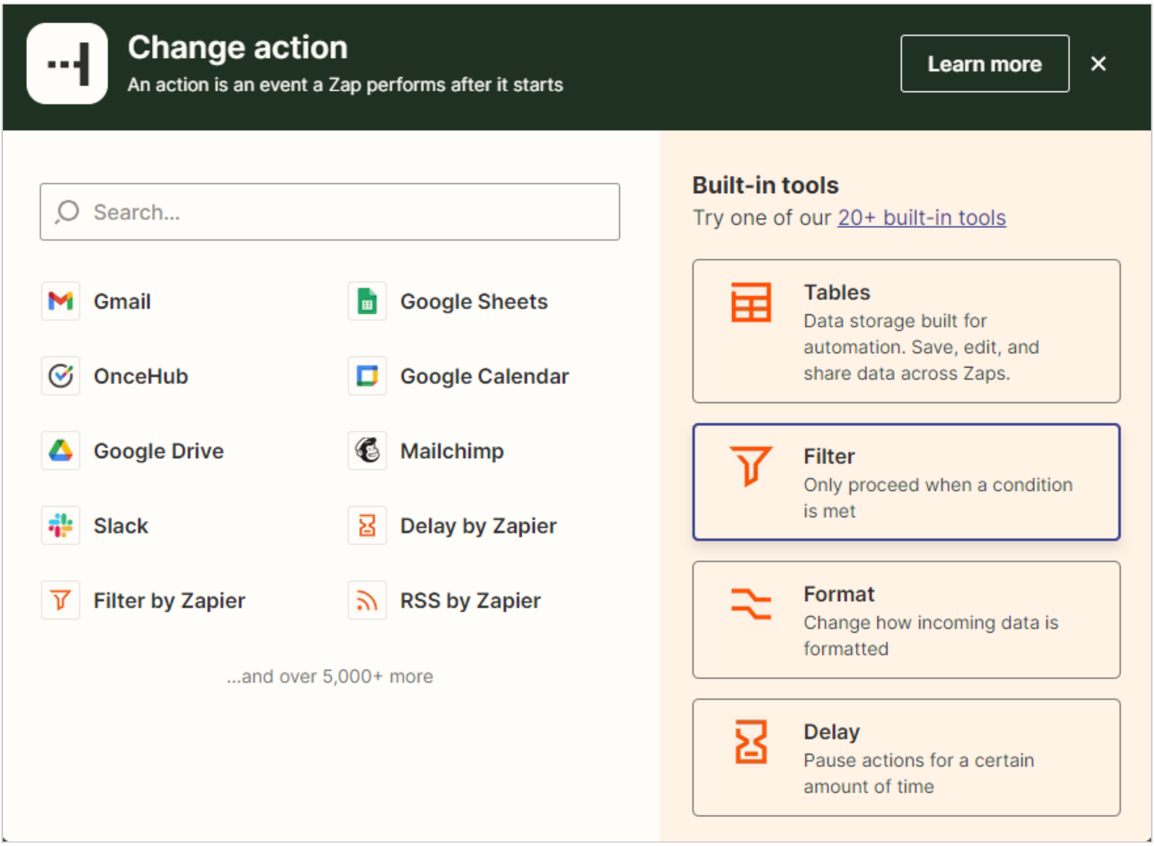


Figure 2: Click on the **Filter** button

Click **Continue** (see Figure 3).

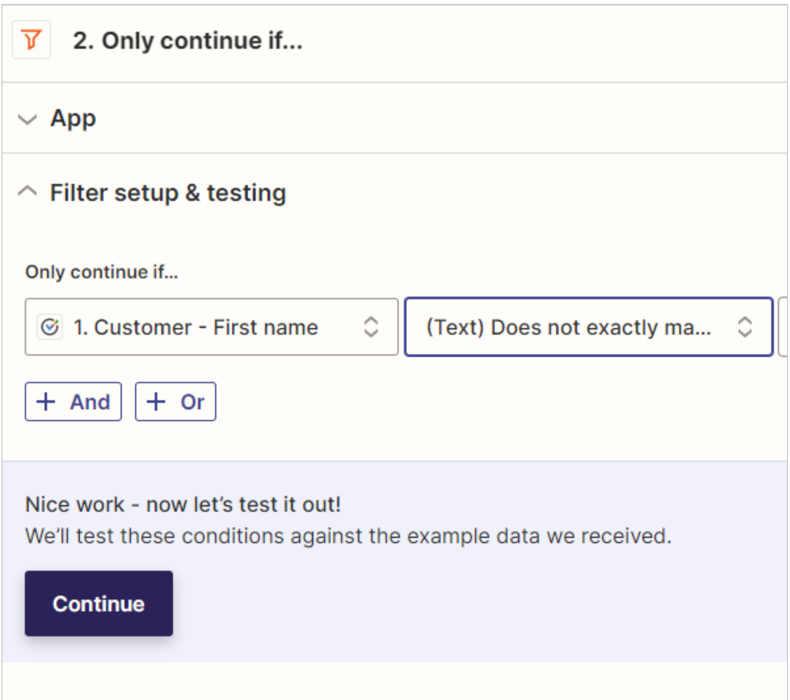


*Figure 3: Click **Save + Continue***

4. Set up and test the Filter. A couple of examples are shown below.

   1. **Example 1: Allow only the "Scheduled" event to trigger the Zap.**
      Select the **Booking – Status** option in the 1st drop-down field. Select the **(Text) Exactly matches** option in the 2nd drop-down field and type "Scheduled" in the 3rd text field (see Figure 4).

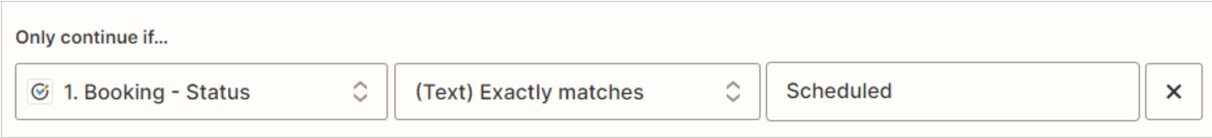


Figure 4: Example

Note:

The **(Text) Exactly matches** filter is case-sensitive. Make sure you use a capital S for "Scheduled".

2. **Example 2: Allow both the "Scheduled" and "Rescheduled" events to trigger the Zap**. Repeat the steps in Example #1. Next, click on the **+ OR** button. In the new added row, select the **Booking – Status** option in the 1st drop-down field. Select the **(Text) Exactly matches** option in the 2nd drop-down field and type "Rescheduled" in the 3rd text field (see Figure 5).

Figure 5: Example 2: Allow both the **Scheduled** and **Rescheduled** events to trigger the Zap

Filtering by Booking page

When you have multiple Booking pages and you wish to track a specific Booking page, you will need to set up a Filter. Setting up this Filter is done the same way described in the section above. The difference is in the Filter definition.

Note:

By default, you can only trigger Zaps from Booking pages you own. OnceHub Administrators can be allowed to trigger Zaps from all Booking pages in the account by enabling a permission in the Administrator's profile.

To define the Filter:

1. Select the **Booking page - Public link** option in the 1st drop-down field (see Figure 6).

   Note:

   Always use the Booking page's public link because it is unique. Do not use the Public name or Internal label because they are only unique to your account.

2. Select the **(Text) Exactly matches** option in the 2nd drop-down field and type or paste the Booking page's public link (see Figure 6). The Booking page's public link can be copied from the Overview section in the Booking page settings in your OnceHub account (see Figure 7).

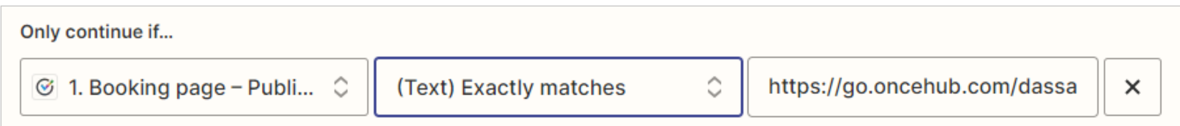


Figure 6: Filter setup

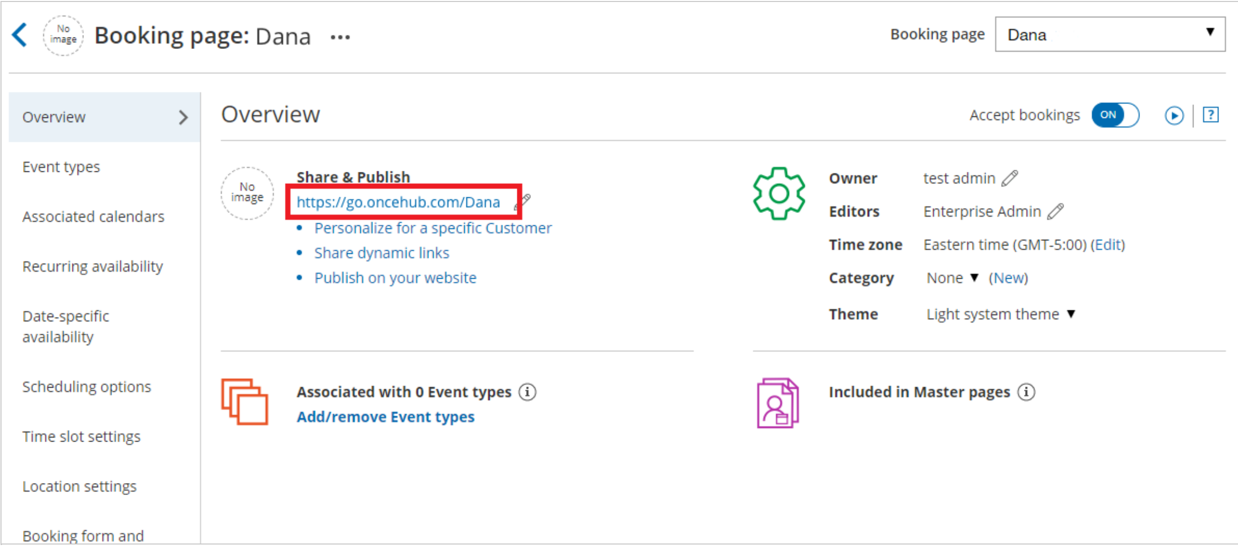


Figure 7: Overview section in the Booking page settings

OnceHub fields and triggers available in Zapier

Last Modified on Nov 12, 2024

This article lists all fields and triggers for OnceHub that are available via Zapier. Any of these fields can be used to integrate with a third-party app.

Booking page information and interaction history

This section contains the data fields relevant to the booking page in question, and the history of the interactions with customers and the relevant booking page.

Booking data

This section includes the data directly related to the booked appointment.

Field	Description
Booking - Attachment	A link to the file attached by your Customer in the Booking form
Booking - Creation date	The time and date when the booking was created, e.g. Mon, Mar 23, 2015, 11:00 AM
Booking - Duration in minutes	The length of the meeting in minutes
Booking - Duration in seconds	The length of the meeting in seconds
Booking - Invoice line item*	Subject, Meeting time in Customer's time zone, Duration, Booking page Owner
Booking - Last updated	The last time any booking details were changed
Booking - Meeting time in Customer's time zone	The time the meeting will start in the Customer's time zone, e.g. Mon, Mar 23, 2015, 10:30 AM - 10:45 AM
Booking - Meeting time in UTC	Starting time in UTC time zone. e.g. Mon, Mar 23, 2015, 10:30 AM
Booking - Meeting time in Owner's time zone	The time the meeting will start in the Owner's time zone, e.g. Mon, Mar 23, 2015, 10:30 AM - 10:45 AM
Booking - Mode	The booking mode: Automatic booking or Booking with approval
Booking - Number of sessions scheduled	The number of sessions in a session package that were scheduled

Booking - Physical location	The address where the meeting will take place, as specified in the **Conferencing / Location** section of the Booking page
Booking - Starting time in Customer's time zone	The time the meeting will start in the Customer's time zone, e.g. Mon, Mar 23, 2015, 10:30 AM
Booking - Starting time in Owner's time zone	The time the meeting will start in the Owner's time zone, e.g. Mon, Mar 23, 2015, 10:30 AM
Booking - Status	The lifecycle phase or activity status of the booking
Booking - Subject	The subject of the meeting, as provided by Customer or Owner
Booking - Summary (long)*	Customer name, Company, Subject, Starting time, Duration, Location, Email, Phone, Mobile phone, Note
Booking - Summary (short)*	Customer name, Company, Location, Notes
Booking – Package ID	A unique ID automatically assigned to every OnceHub session package
Booking - Virtual location	The communication details required for connecting to the virtual meeting, as specified in the **Conferencing / Location** section of the Booking page. This could be a phone number, video conferencing information, a Skype ID, etc.
Booking - Virtual or physical location	The virtual or physical location of the meeting, as specified in the **Conferencing / Location** section of the Booking page
Attendees	A complete list of the emails of all the attendees of the meeting.
UTM source - Found in the Conversation lifecycle triggers	The source defined in the UTM parameter when the customer booked the meeting
UTM medium - Found in the Conversation lifecycle triggers	The medium defined in the UTM parameter when the customer booked the meeting
UTM campaign - Found in the Conversation lifecycle triggers	The campaign defined in the UTM parameter when the customer booked the meeting
UTM term - Found in the Conversation lifecycle triggers	The term defined in the UTM parameter when the customer booked the meeting

UTM content - Found in the Conversation lifecycle triggers	The content defined in the UTM parameter when the customer booked the meeting

* **Composite fields:** These fields are considered **Summary** fields and contain a list of values from other fields separated by commas. These are best used for **Description** fields in 3rd party apps. Learn more about composite fields

Cancel/reschedule data

This section includes the data related to cancellation and rescheduling activities.

Field	Description
Cancel/reschedule - Initiated by customer name	The name of the Customer who performed the cancellation or reschedule action
Cancel/reschedule - Initiated by user name	The name of User who performed the cancellation or reschedule action
Cancel/reschedule - Reason	The reason given for canceling or rescheduling a meeting
Cancel/reschedule - Summary (long)*	Reschedule indication, Reschedule reason + long booking summary
Cancel/reschedule - Summary (short)*	Reschedule indication, Reschedule reason + short booking summary
Cancel/reschedule – Customer link	The cancel/reschedule link to be used by the Customer
Cancel/reschedule – Tracking ID (canceled booking)	The Tracking ID of the canceled original booking

* **Composite fields:** These fields are considered **Summary** fields and contain a list of values from other fields separated by commas. These are best used for **Description** fields in 3rd party apps. Learn more about composite fields

Booking page data

This section includes the data related to properties of the booking page used to make the booking.

Field	Description
Booking page - Category	The category to which the Booking page has been assigned
Booking page - Internal label	The internal label of the Booking page
Booking page - Public link	The public link for the Booking page
Booking page - Public name	The public name of the Booking page

Master page - Internal label	The internal label for the Master page
Master page - Public link	The public link for the Master page
Master page - Public name	The public name of the Master page
Booking page - Owner	The User whose time is being booked via the Booking page
Booking page - Time zone	The time zone of the Booking page

Event type data

This section includes the data related to properties of the Event types selected during the booking process.

Field	**Description**
Event type - Category	The Category of the Event type selected by the Customer
Event type - Description	The description of the Event type selected by the Customer
Event type - Name	The name of the Event type selected by the Customer
Event type - Price	The price of the Event type selected by the Customer
Event type - Currency	The currency of the Event type selected by the Customer

Custom fields

OnceHub provides support for custom fields in Zapier. When you add new custom fields, they will appear alongside your system fields when you map trigger fields to action fields.

Below is a description of how each OnceHub custom field is passed through Zapier.

OnceHub custom field	Target app field format	Example
Single-line text field	{Plain text}	This is a single-line example
Multi-line text field	{Plain text}	This is a multi-line example
Dropdown	{Option value}	This is a dropdown selection example
Checkbox	{Option value}, {Option value}, ... * Each checked checkbox will be appended at the end separated by a comma ','	This a one checkbox, This is another checkbox, This is the last checkbox
Attachment	{Link}	http://www.example.com/sample.gif

OnceHub composite fields available in Zapier

This section lists OnceHub composite fields created to make Zapier integration easier.

Zapier allows you to map multiple OnceHub fields, along with static text, to one composite field in the integrated app. This ability is useful when adding information taken from multiple fields in OnceHub. For example:

- Adding information to the Description field in a CRM task
- Adding information to a note
- Adding information to a line item in an invoice
- Creating a text file based on customer data or booking data

To support these cases, we have created composite fields in OnceHub. These fields combine multiple OnceHub fields and their titles.

Booking - Summary (long and short) composite field

Long

This composite field includes the following OnceHub fields:

- Customer Name
- Customer Company
- Subject/service
- Starting time (in Owner's time zone)
- Duration
- Virtual location or Physical location
- Customer e-mail
- Customer Phone
- Customer Mobile Phone
- Customer Note

Example:
Meeting with: Lisa Brown, Company: Lisa Brown Consulting, Subject: Zapier Integration, Start time: Wednesday, Jul 4, 2015 1:00 PM, Duration: 30 min, Location: ... , Customer email: lisa.brown@lbconsulting.com, Customer phone: 524-698-1288, Customer mobile phone: 524-668-8921, Note from customer: Hi, I want to discuss your Zapier integration.

Short

This composite field includes the following OnceHub fields:

- Customer name
- Customer company
- Virtual location or Physical location
- Customer note

Example:

Meeting with: Lisa Brown, Company: Lisa Brown Consulting, Location: ... , Note from customer: Hi, I want to discuss your Zapier integration.

Cancel/Reschedule - Summary (long and short) composite field

Long

This composite field includes the following OnceHub fields:

- Rescheduling indication
- Rescheduling reason
- Description (Long) composite field or Short Description composite field information, as described above.

Example:
This meeting has been rescheduled. Rescheduling reason: I have another urgent meeting, Meeting with: Lisa Brown, Company: Lisa Brown Consulting, Subject: Zapier Integration, Start time: Wednesday, Jul 4, 2015 1:00 PM, Duration: 30 min, Location: ... , Customer email: lisa.brown@lbconsulting.com, Customer phone: 524-698-1288, Customer mobile phone: 524-668-8921, Note from customer: Hi, I want to discuss your Zapier integration.

Short

This composite field includes the following OnceHub fields:

- Rescheduling indication
- Rescheduling reason
- Description (Short) composite field or Short Description composite field information, as described above.

Example:
This meeting has been rescheduled. Rescheduling reason: I have another urgent meeting, Meeting with: Lisa Brown, Company: Lisa Brown Consulting, Location: ... , Note from customer: Hi, I want to discuss your Zapier integration.

Booking data and Invoice line item composite field

This composite field includes the following OnceHub fields:

- Booking subject or service name
- Meeting time in Customer's time zone
- Meeting duration
- Booking page owner

Example:
Tax preparation, Wed, Jul 4, 2020 1:00 PM, 30 min, with Sarah Bloch

This article lists all fields that OnceHub makes available via Zapier. Any of these fields can be used to integrate with a third-party app.

Booking data

This section includes the data directly related to the booked appointment.

Field	Description
Booking - Attachment	A link to the file attached by your Customer in the Booking form
Booking - Creation date	The time and date when the booking was created, e.g. Mon, Mar 23, 2015, 11:00 AM
Booking - Duration in minutes	The length of the meeting in minutes
Booking - Duration in seconds	The length of the meeting in seconds
Booking - Invoice line item*	Subject, Meeting time in Customer's time zone, Duration, Booking page Owner
Booking - Last updated	The last time any booking details were changed
Booking - Meeting time	The scheduled date and time of the meeting
Booking - Meeting time in Customer's time zone	The time the meeting will start in the Customer's time zone, e.g. Mon, Mar 23, 2015, 10:30 AM - 10:45 AM
Booking - Meeting time in UTC	Starting time in UTC time zone. e.g. Mon, Mar 23, 2015, 10:30 AM
Booking - Meeting time in Owner's time zone	The time the meeting will start in the Owner's time zone, e.g. Mon, Mar 23, 2015, 10:30 AM - 10:45 AM
Booking - Mode	The booking mode: Automatic booking or Booking with approval
Booking - Number of sessions scheduled	The number of sessions in a session package that were scheduled
Booking - Physical location	The address where the meeting will take place, as specified in the **Conferencing / Location** section of the Booking page
Booking - Starting time in Customer's time zone	The time the meeting will start in the Customer's time zone, e.g. Mon, Mar 23, 2015, 10:30 AM
Booking - Starting time in Owner's time zone	The time the meeting will start in the Owner's time zone, e.g. Mon, Mar 23, 2015, 10:30 AM

Booking - Status	The lifecycle phase or activity status of the booking
Booking - Subject	The subject of the meeting, as provided by Customer or Owner
Booking - Summary (long)*	Customer name, Company, Subject, Starting time, Duration, Location, Email, Phone, Mobile phone, Note
Booking - Summary (short)*	Customer name, Company, Location, Notes
Booking - Tracking ID	A unique ID automatically assigned to every OnceHub booking
Booking – Package ID	A unique ID automatically assigned to every OnceHub session package
Booking - Virtual location	The communication details required for connecting to the virtual meeting, as specified in the **Conferencing / Location** section of the Booking page. This could be a phone number, video conferencing information, a Skype ID, etc.
Booking - Virtual or physical location	The virtual or physical location of the meeting, as specified in the **Conferencing / Location** section of the Booking page
UTM source - Found in the Conversation lifecycle triggers	The source defined in the UTM parameter when the customer booked the meeting
UTM medium - Found in the Conversation lifecycle triggers	The medium defined in the UTM parameter when the customer booked the meeting
UTM campaign - Found in the Conversation lifecycle triggers	The campaign defined in the UTM parameter when the customer booked the meeting
UTM term - Found in the Conversation lifecycle triggers	The term defined in the UTM parameter when the customer booked the meeting
UTM content - Found in the Conversation lifecycle triggers	The content defined in the UTM parameter when the customer booked the meeting

* **Composite fields:** These fields are considered **Summary** fields and contain a list of values from other fields separated by commas. These are best used for **Description** fields in 3rd party apps. Learn more about composite fields

This section details the different triggers available in Zapier for OnceHub activities.

Mapping of OnceHub fields to Zapier triggers

The following table outlines what OnceHub attributes are available for each Zapier trigger:

Field name in Zapier	Scheduled	Rescheduled	Canceled	Canceled (Rescheduled)	Completed	No-Show	Booking Lifecycle Event
Booking - Attachment	X	X	X	X	X	X	X
Booking - Creation date	X	X	X	X	X	X	X
Booking - Summary (long)	X	X	X	X	X	X	X
Booking - Summary (short)	X	X	X	X	X	X	X
Booking- Duration in minutes	X	X	X	X	X	X	X
Booking - Duration in seconds	X	X	X	X	X	X	X
Booking - Last updated	X	X	X	X	X	X	X
Booking - Meeting time in UTC	X	X	X	X	X	X	X
Booking - Meeting time in Customer's time zone	X	X	X	X	X	X	X
Booking - Meeting time in Owner's time zone	X	X	X	X	X	X	X
Booking - Mode	X	X	X	X	X	X	X
Booking - Number of sessions scheduled	X	X	X	X	X	X	X
Booking - Physical location	X	X	X	X	X	X	X
Booking -Starttime in Customer's time zone	X	X	X	X	X	X	X
Booking -Starttime in Owner's time zone	X	X	X	X	X	X	X
Booking - Status	X	X	X	X	X	X	X
Booking - Subject	X	X	X	X	X	X	X
Booking - Tracking ID	X	X	X	X	X	X	X
Booking - Package ID	X	X	X	X	X	X	X
Booking - Virtual location	X	X	X	X	X	X	X
Booking - Virtual or physical location	X	X	X	X	X	X	X
Customer - Company	X	X	X	X	X	X	X
Customer - Country	X	X	X	X	X	X	X
Customer - Email	X	X	X	X	X	X	X

Field name in Zapier	Scheduled	Rescheduled	Canceled	Canceled (Rescheduled)	Completed	No-Show	Booking Lifecycle Event
Customer - First name	X	X	X	X	X	X	X
Customer - Last name	X	X	X	X	X	X	X
Customer - Location	X	X	X	X	X	X	X
Customer - Mobile phone	X	X	X	X	X	X	X
Customer - Name	X	X	X	X	X	X	X
Customer - Note	X	X	X	X	X	X	X
Customer - Phone	X	X	X	X	X	X	X
Customer - State	X	X	X	X	X	X	X
Customer - Time zone	X	X	X	X	X	X	X
Cancel/reschedule - Initiated by customer name		X	X	X			X
Cancel/reschedule - Initiated by user name		X	X	X			X
Cancel/reschedule - Reason		X	X	X			X
Cancel/reschedule - Summary (long)		X		X			X
Cancel/reschedule - Summary (short)		X		X			X
Cancel/reschedule - Customer link	X	X					X
Cancel/reschedule - Tracking ID (canceled booking)		X					X
Booking page - Category	X	X	X	X	X	X	X
Booking page - Internal label	X	X	X	X	X	X	X
Booking page - Public link	X	X	X	X	X	X	X
Booking page - Public name	X	X	X	X	X	X	X
Master page - Internal label	X	X	X	X	X	X	X
Master page - Public link	X	X	X	X	X	X	X
Master page - Public name	X	X	X	X	X	X	X
Booking page - Owner	X	X	X	X	X	X	X
Booking page - Time zone	X	X	X	X	X	X	X

Field name in Zapier	Scheduled	Rescheduled	Canceled	Canceled (Rescheduled)	Completed	No-Show	Booking Lifecycle Event
Event type - Category	X	X	X	X	X	X	X
Event type - Description	X	X	X	X	X	X	X
Event type - Name	X	X	X	X	X	X	X
Event type - Price	X	X	X	X	X	X	X
Event type – Currency	X	X	X	X	X	X	X

OnceHub triggers on Zapier

Triggers are the means through which you tell Zapier what OnceHub data to send to your third-party app. This article describes the OnceHub Zapier triggers you can use when integrating OnceHub with your application of choice.

OnceHub provide two types of triggers, specific and composite. **Specific triggers** are based on an individual booking event, e.g. Scheduled Booking. Using these triggers, you can control granular interactions between OnceHub and other apps, e.g. create a new Contact in the target app when a new booking is made. Each specific trigger also has a unique set of attributes that is passed through Zapier. **Composite triggers** are considered 'dynamic' triggers. These triggers are fired each time a booking changes its status. Each type of trigger is used for different purposes as described below. Please read the Mapping of OnceHub fields to Zapier triggers article above for more information.

The following is a complete list of OnceHub Zapier triggers that are available to you, grouped by the two types:

Specific triggers

- Booking Scheduled
- Booking Canceled
- Booking Completed
- Booking No-Show
- Booking Rescheduled
- Booking Canceled and Rescheduled
- Conversation Reached Out
- Conversation Started
- Conversation Closed
- Conversation Abandoned
- Contact Captured
- Contact Updated

Composite triggers

- Contact Lifecycle Event
- Booking Lifecycle Event
- Conversation Lifecycle Event

When to use specific and composite triggers?

When including OnceHub in email marketing and marketing automation campaigns, you should use **specific triggers**. This gives you the power to target specific users based on their level of engagement and interaction with your campaign. For example, you can provide additional resources to users who have made a booking. You can invite users to book a new meeting in case they have canceled the original one. You can also send out a feedback form as soon as the booking had ended, i.e. the booking status changed to "Completed".

When you wish to continuously track your booking activity, you can use the **Booking Lifecycle Event composite trigger** with productivity apps such as Google Sheet, Evernote, or Slack. Using this trigger allows you to define only one Zap which records all of your booking activity.

Below is a detailed explanation of each OnceHub trigger.

Booking Scheduled

This trigger is fired each time a booking is made on your booking page.

The complete list of fields sent with this trigger can be found in the Mapping of OnceHub Fields to Zapier Triggers section above.

Booking Canceled

This trigger is fired when a booking is canceled. A booking can be canceled using one of the following methods:

- Canceled by User without event types
- Canceled by User with event types
- Canceled by User in the connected Google Calendar
- Canceled by User in the connected Outlook Calendar
- Canceled by the Customer

The complete list of fields sent with this trigger can be found in the Mapping of OnceHub Fields to Zapier Triggers article.

Note:

This trigger is different than the **Canceled Booking (Rescheduled)** trigger. **Canceled Booking** means that the booking is canceled for good, while **Canceled Booking (Rescheduled)** only indicates the removal of the original booking when a new booking is created instead.

Completed Booking

This trigger is fired as soon as the meeting time has passed. For example, if a one hour booking was scheduled for Monday at 10:00 AM, the Completed trigger will fire at 11:00 AM.

One way to effectively use this trigger is to set up an email marketing campaign that will be triggered as soon as a booking is completed. The campaign could send out a survey, a questionnaire or even an invitation to book another meeting. Meeting follow-up functionality is also provided in OnceHub.

No-show Booking

This trigger is fired when the user changes the bookings status from Completed to No-show. This can be done only once the booking is in the **Completed** status.

One way to effectively use this trigger is to set up an email marketing campaign that will be triggered as soon as a booking is set to **No-show**. The campaign could send out an email asking the customer, who did not show up to the meeting, to schedule another meeting.

The complete list of fields sent with this trigger can be found in the Mapping of OnceHub Fields to Zapier Triggers section above.

Booking Canceled and Rescheduled

These two triggers work in tandem and provide the necessary information for each rescheduling scenario. When a booking is rescheduled in OnceHub, the original booking is either updated, or canceled and replaced by a new booking. It's important to distinguish between the different types of reschedule scenarios that fire the **Rescheduled Booking** and **Canceled Booking (Rescheduled)** triggers. Each scenario includes a different trigger combination and slightly varying attributes.

The following scenarios are supported:

1. Customer reschedules with the same Booking page. When the Customer reschedules a booking with the same Booking page, a single **Rescheduled Booking** trigger is fired containing the same Booking ID as the original booking. This is based on the assumption that if the event was created under the same Booking page, then we only need to update the event and not create a new booking. Below is a table outlining the triggers and attributes used in this scenario.

Zapier trigger	Attribute	Notes
Canceled Booking (Rescheduled)	N/A	This trigger is not fired.
Rescheduled Booking	Booking – Booking ID	The existing booking ID
	Booking page – Owner	The existing User name

2. Customer reschedules with a different Booking page. When the Customer reschedules the booking with a Booking page that is different from the one they originally made the booking with, two triggers are fired, one to cancel the original booking and another to create a new booking instead. Below is a table outlining the triggers and attributes used in this scenario.

Zapier trigger	Attribute	Notes
Canceled Booking (Rescheduled)	Booking – Booking ID	The existing booking ID
	Booking page – Owner	The original User name
Rescheduled Booking	Booking – Booking ID	The new booking ID
	Cancel/reschedule - Booking ID (canceled booking)	The original booking ID

	Booking page – Owner	The new User name

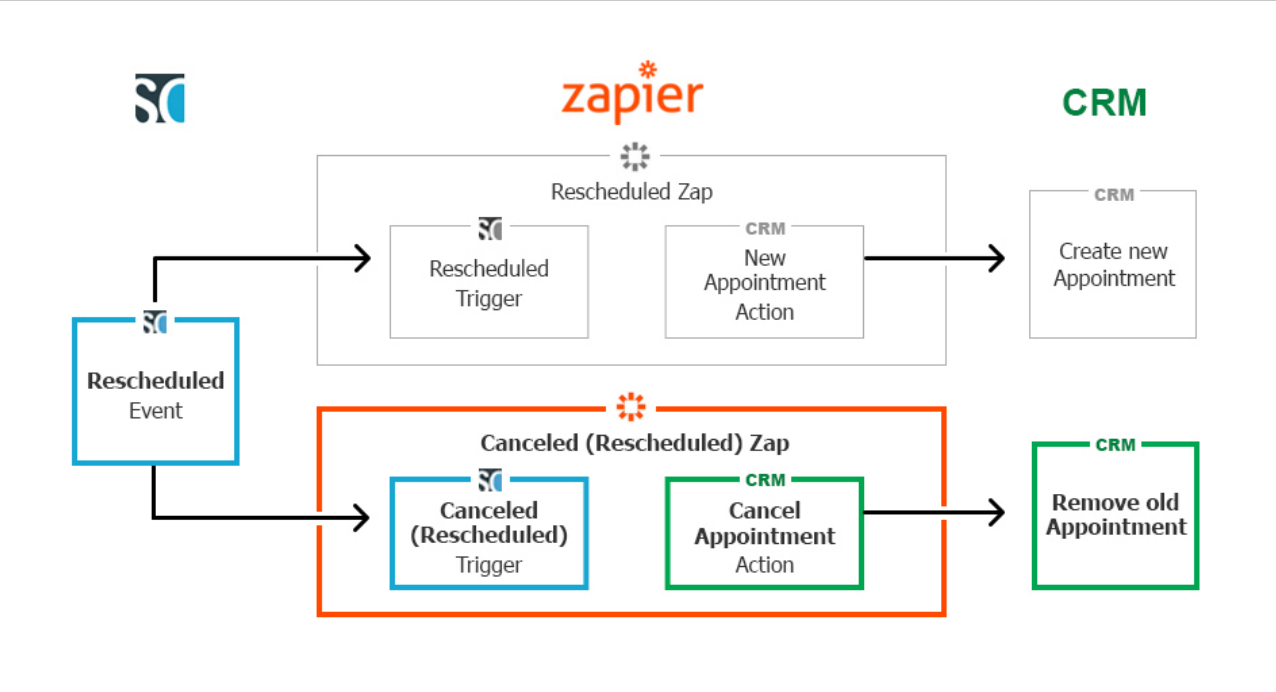
3. User requests the Customer to reschedule. When the User requests the Customer to reschedule the booking, the **Canceled Booking (Rescheduled)** trigger is fired instantly as the original booking is no longer valid. The **Reschedule Booking** trigger is fired only after the Customer had rescheduled the booking. Below is a table outlining the triggers and attributes used in this scenario.

Zapier trigger	Attribute	Notes
Canceled Booking (Rescheduled)	Booking – Booking ID	The existing booking ID
	Booking page – Owner	The original User name
Rescheduled Booking	Booking – Booking ID	The new booking ID
	Cancel/reschedule - Booking ID (canceled booking)	The original booking ID
	Booking page – Owner	The new User name

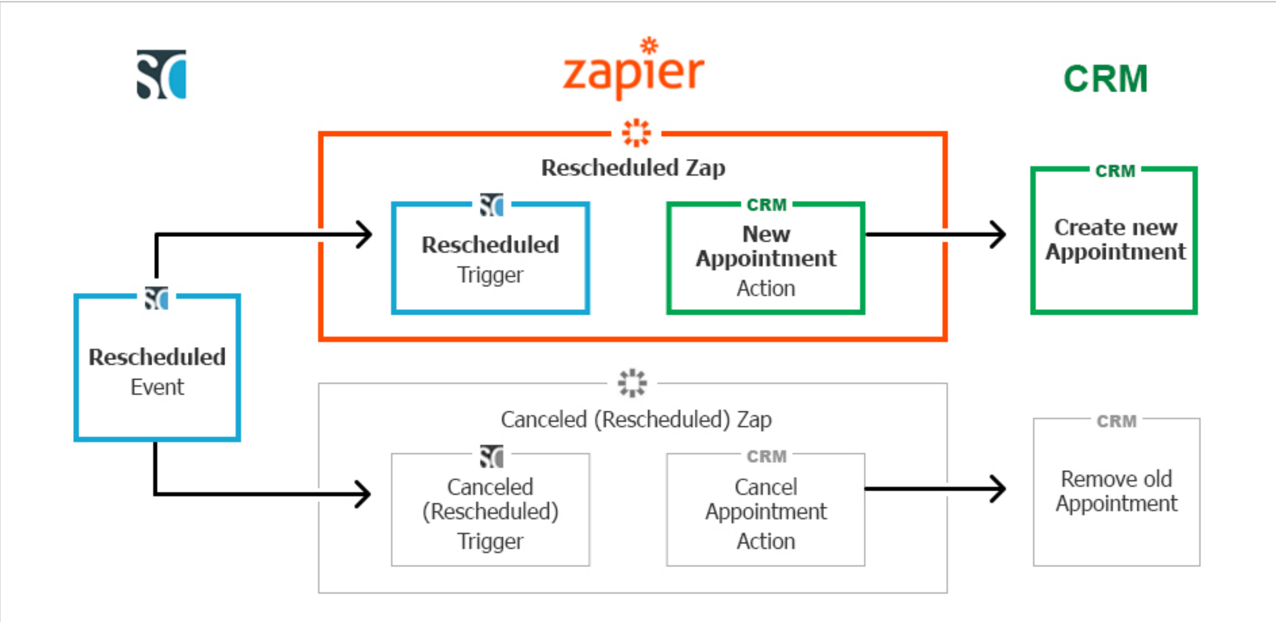
4. **User reschedules from a connected Google Calendar or Outlook Calendar.**
When the setting to Changing the time in Google updates the booking in OnceHub is enabled, moving events in your calendar also updates the event in OnceHub. The **Rescheduled Booking** trigger is fired, when the User changes the calendar event details or moves the calendar event to another slot**.** This is a common use case whereby the Customer calls the User and asks them to reschedule the booking on their behalf. This event behaves the same as if a Customer initiated reschedule with the same User.

Zapier trigger	Attribute	Notes
Canceled Booking (Rescheduled)	N/A	This trigger is not fired.
Rescheduled Booking	Booking – Booking ID	The existing booking ID
	Booking page – Owner	The existing User name

The following example describes the reschedule scenario that was initiated by the Customer and resulted in a booking that was made with a different Booking page. First, the **Canceled (Rescheduled)** trigger is fired including the **original** booking information. This allows the target application to remove the previously created appointment. In the illustration below, the **Canceled (Rescheduled) Zap** at the bottom, joins the OnceHub **Canceled (Rescheduled)** Trigger with your CRM **Cancel Appointment** Action.



Second, the **Rescheduled Booking** trigger is fired including the **new** booking information. This allows the target application to create a new appointment (the rescheduled booking). In the illustration below, the **Rescheduled Zap** at the top, joins the OnceHub **Rescheduled** Trigger with your CRM **New Appointment** Action.



Note: Having a dedicated reschedule cancellation trigger, allows you to handle these events differently than standard cancellation events. This is especially relevant if you have set up a marketing campaign that targets canceled bookings. In this instance, you would not want to trigger the same campaign if a reschedule event occurred.

The complete list of fields sent with this trigger can be found in the Mapping of OnceHub Fields to Zapier Triggers article.

Booking Lifecycle Event

This trigger is fired each time a booking changes its status, i.e. Scheduled, Rescheduled, Canceled, Completed, or No-show.

Different from the specific triggers mentioned above, this trigger is best used to log all booking activities. As an example, you can use a Google Sheets Zapier integration to record all booking activities for monitoring or reporting purposes.

For more details on how to use this trigger in addition to some powerful filtering tips, see Tips for integrating OnceHub with productivity apps.

Conversation Reached Out

Whenever your chatbot reaches out to a visitor, this trigger is fired. Note that reaching out happens without visitor interaction required, whenever the reaching out message displays for a visitor. This is right before they opt whether to engage with the bot by clicking on an answer, opening the widget fully so your chatbot can engage in a conversation with them.

Conversation Started

Once the visitor clicks on an answer, this trigger is fired. They've taken action to engage with the bot, indicating a higher level of interest than other visitors to your website.

Conversation Completed

When your visitor reaches either the last interaction or the **End chat** action in your chatbot, the conversation is completed and this trigger will fire.

Conversation Abandoned

This trigger is fired when a visitor doesn't interact with the chatbot for over ten minutes.

Contact Captured

If you've captured a new contact through any OnceHub app, this trigger is fired.

Contact Updated

If your contact was updated in OnceHub—for instance, a status update from Qualified to Sales Qualified—this trigger is fired. This could happen either through an automated flow or if one of your Users updates the status manually.

Our Zapier support policy

Last Modified on Dec 13, 2021

OnceHub takes responsibility for the following aspects in the Zapier integration:

1. A successful connection established between OnceHub and Zapier
2. OnceHub data correctly sent to Zapier
3. Zapier data correctly received by OnceHub

However, we cannot take responsibility for any issues related to Zapier or any third-party app. We cannot troubleshoot these issues on our end.

Our responsibilities

OnceHub is responsible for the following integration stages:

1. **Establishing a connection between OnceHub and Zapier.**

   We will ensure that the connection test in Zapier is successful.
2. **OnceHub sends data to Zapier.**

   This can be detected in one of the following ways:

   - The integration works with one of the third-party apps.
   - Zapier receives data from OnceHub, shown by testing one of the Zaps.
3. **OnceHub receives data from Zapier.**

   When you connect Zapier to OnceHub, your OnceHub Zaps and their statuses will be listed in your OnceHub account. OnceHub is responsible for maintaining the connection and for displaying the correct list of Zaps and their statuses, as retrieved via the Zapier API.

Not under our responsibility

We do not provide support for the following issues:

1. Establishing a connection between another third-party app and Zapier
2. Creating the Zaps
3. The third-party app is not receiving data from Zapier, while the integration between OnceHub and another app is working

In the above cases, OnceHub may provide assistance or tips as a courtesy. However, these issues are not under our responsibility. You will need to contact Zapier or the third-party app for support.

Introduction to the PC connector for Outlook

Last Modified on Nov 1, 2024

The PC connector for Outlook is installed on the User's Windows PC (Mac is not supported) and establishes a real-time connection between OnceHub and the User's Outlook Calendar. The connection to Outlook Calendar is completely secure**.** Your calendar information is always kept private and calendar appointments and free/busy patterns are never revealed to Customers.

Note:

In addition to connecting with your Outlook Calendar on your PC, OnceHub also can connect directly to the Office 365 API. This might be a more stable option than connecting to your local computer's Outlook software through a downloaded connector. If you use Office 365, OnceHub recommends that you connect through our API integration with the Office 365 cloud rather than through the Outlook client integration. Learn more about the differences between the Office 365 and Outlook integrations

In order to start syncing the connector, you will need to:

1. Download and install the OnceHub connector for Outlook on your Windows PC
2. Connect and configure the connector’s settings
3. Configure calendar settings for your Booking pages

Important: *After you download the OnceHub connector for Outlook, you are in a pending connection state with your Outlook Calendar and you will not be able to accept bookings until you install the connector and perform the first sync.*

Outlook sync modes

- **Real-time**: The connector will automatically push to OnceHub any change made to Calendar appointments in the calendars that you have selected to sync with OnceHub. When a booking is made in OnceHub, it will automatically sync and populate your relevant Outlook Calendar.
- **Auto-sync every X minutes/hours**: The connector will sync at every time interval that you choose.
- **Manual sync**: When you choose to sync manually, a **Sync** button will be added to the connector. Manual sync mode is useful for testing and is not a recommended sync mode.

Learn more about Outlook sync modes

Installing the PC connector for Outlook

Last Modified on Oct 18, 2022

OnceHub uses a proprietary connector to establish a secure connection with your Outlook Calendar. Once connected, all communication with your Outlook Calendar is encrypted, keeping your calendar data safe and secure.

In this article, you will learn how to generate OnceHub authentication credentials and how to install the PC connector for Outlook on your Windows PC (Mac is not supported).

Important:

In addition to connecting with your Outlook Calendar on your PC, OnceHub can also connect directly to the Office 365 API. This may be a more stable option than connecting to your local computer's Outlook software through a downloaded connector. If you use Office 365, OnceHub recommends that you connect through our API integration with the Office 365 cloud rather than through the Outlook client integration.

However, if you need to use the PC connector, please contact us. We can confirm whether this option works best for your environment and, if relevant, enable it in your account.

Requirements:

- A Windows PC
- Microsoft Outlook 2007 or newer

Downloading the connector:

1. **Contact us** to enable the PC connector as an option.
2. In OnceHub, select your profile picture or initials in the top right-hand corner → **Profile settings** → **Calendar connection**.
3. On the **Calendar connection** page, click **Connect additional calendars in OnceHub**.
4. Select the **PC connector for Outlook** option.
5. In the next window, click **Continue**. (See Figure 2)

Figure 2: Connect to Outlook Calendar popup

6. On the **Connect your Outlook Calendar** page, you can download the connector to your Windows PC. Click the **Download and connect** button (see Figure 3).

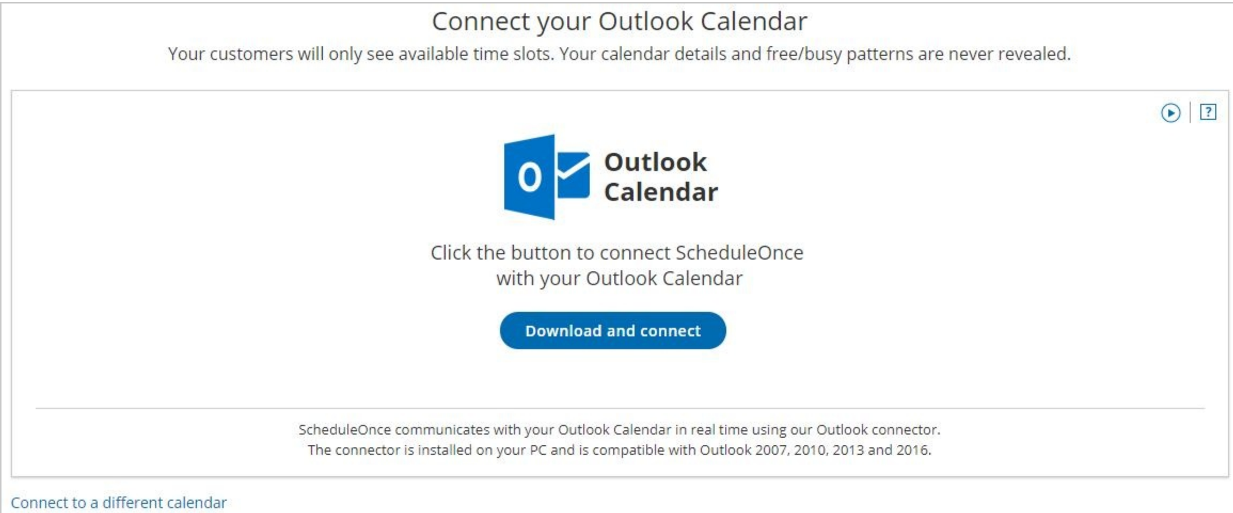


Figure 3: Outlook Calendar integration page

7. Click **Yes** to download (see Figure 4).

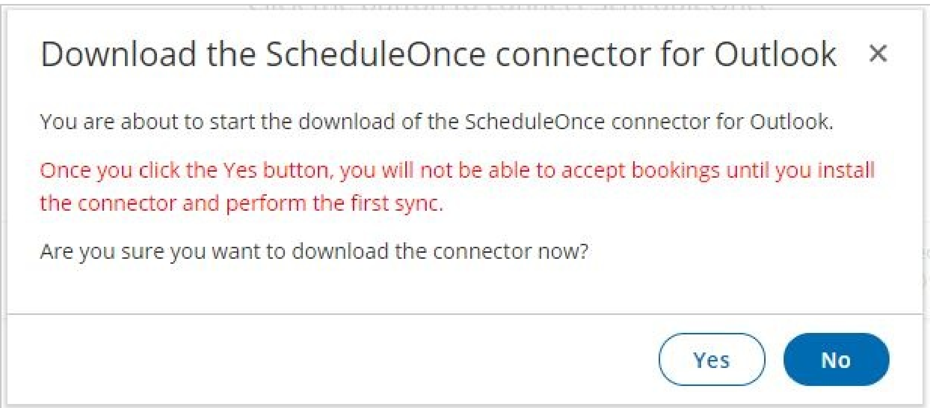


Figure 4: Download the PC connector for Outlook

8. After you download the PC connector for Outlook, you are in a pending connection state with your Outlook Calendar and you will not be able to accept bookings until you install the connector and perform the first sync. On the page, you will see your credentials and the step-by-step instructions to connect and configure the Outlook connector (see Figure 5). You will need these credentials to sign in to the connector.

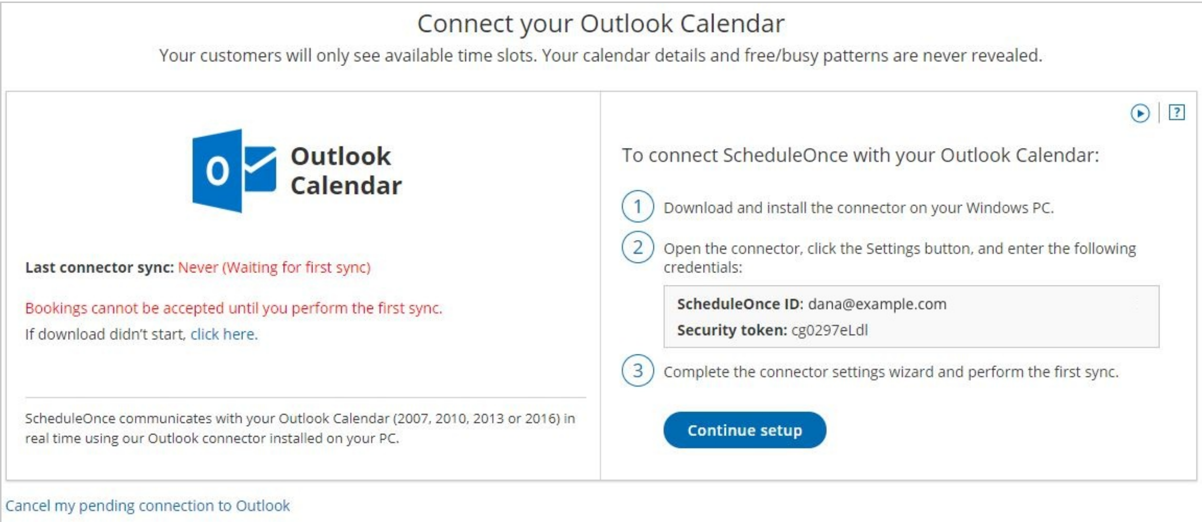


Figure 5: Outlook Calendar integration page - Setup

Note:

The connector is compatible with Outlook 2007, 2010, 2013, and 2016. The connector installation file size is about 16mb. The connector is not compatible with Macs.

In order to start syncing the connector, you will need to:

1. Connect and configure the connector's settings
2. Configure calendar settings for your Booking pages

Connecting and configuring the PC connector for Outlook

Last Modified on Jun 2, 2023

In this article, you will learn how to connect and configure the Outlook connector on your Windows PC (Mac is not supported). This article assumes that you already installed the connector. Learn more about installing the PC connector for Outlook

Important:

Once you download the PC connector for Outlook, you will not be able to accept bookings until you install the connector and perform the first sync.

1. From the system tray icons in your Windows PC, click the PC connector icon and select **Open connector** (see Figure 1).

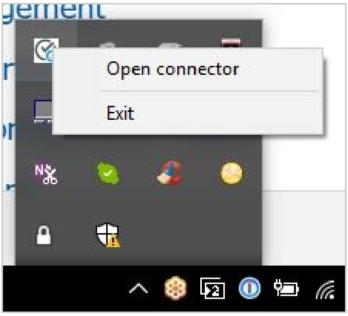


Figure 1: Open connector

Note:

Alternatively, you can double-click the PC connector icon from your desktop.

2. This will bring the connector to the front of the screen (see Figure 2). Click the **Settings** button.

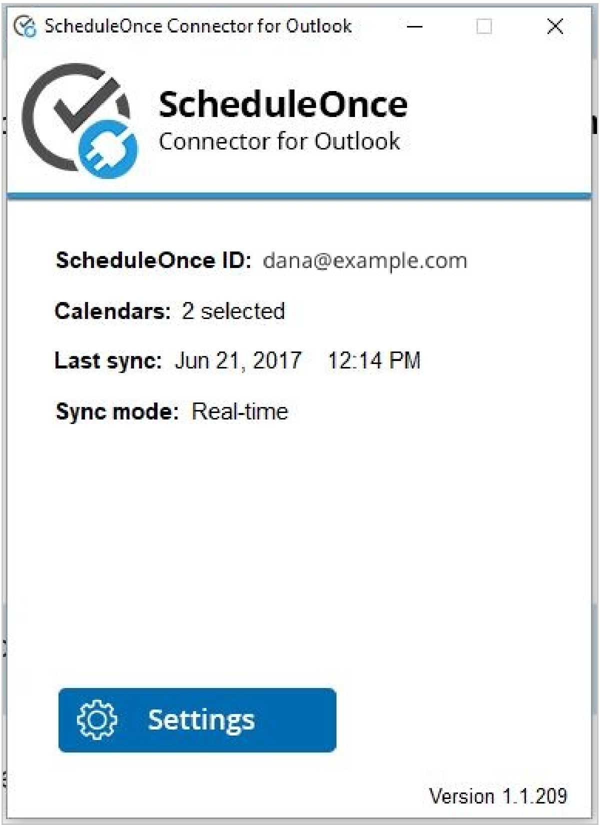


Figure 2: PC Connector for Outlook

3. After clicking the **Settings** button, you'll be prompted to connect to your OnceHub account.
   In your OnceHub account, select your profile picture or initials in the top right-hand corner → **Profile settings** → **Calendar connection**.
4. Copy the **OnceHub ID** and **Security token** from the **Connect your Outlook Calendar** page into the **PC Connector for Outlook** (see Figure 3).

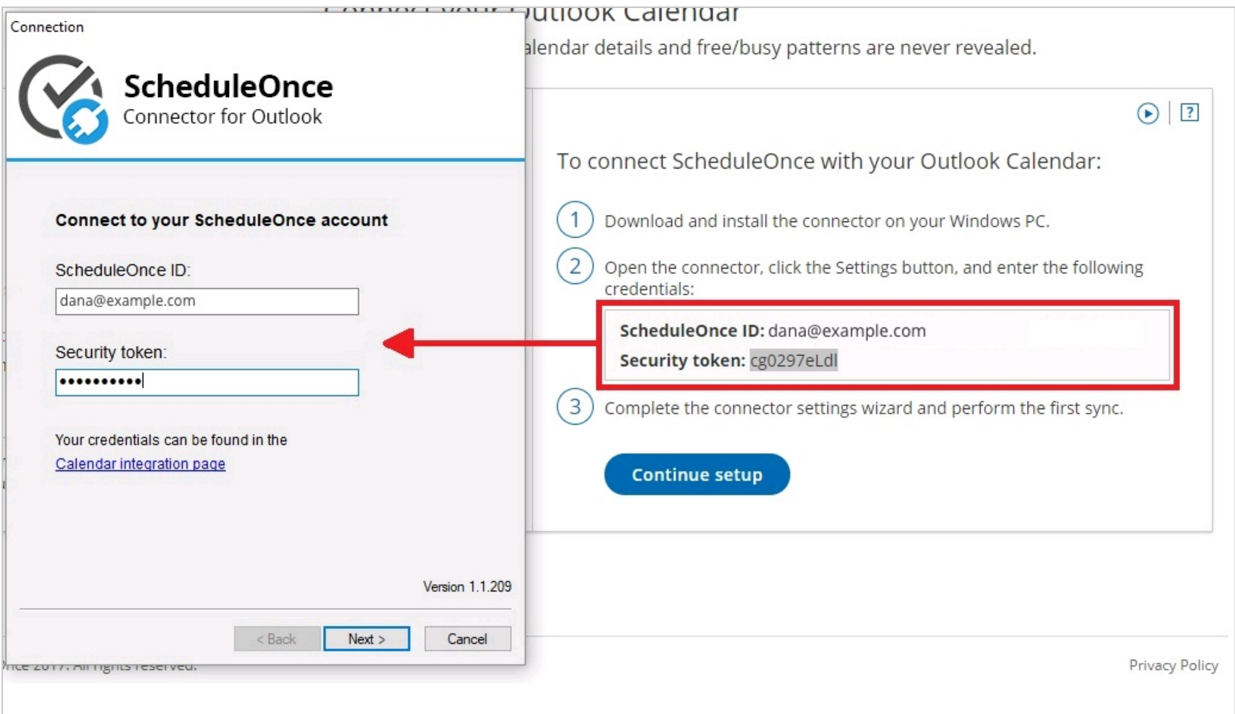


Figure 3: Connect to your OnceHub account

Once you've entered the credentials, click **Next**. If you enter your credentials incorrectly six times within a 10-minute period, your connection will be blocked for 30 minutes (see Figure 4).

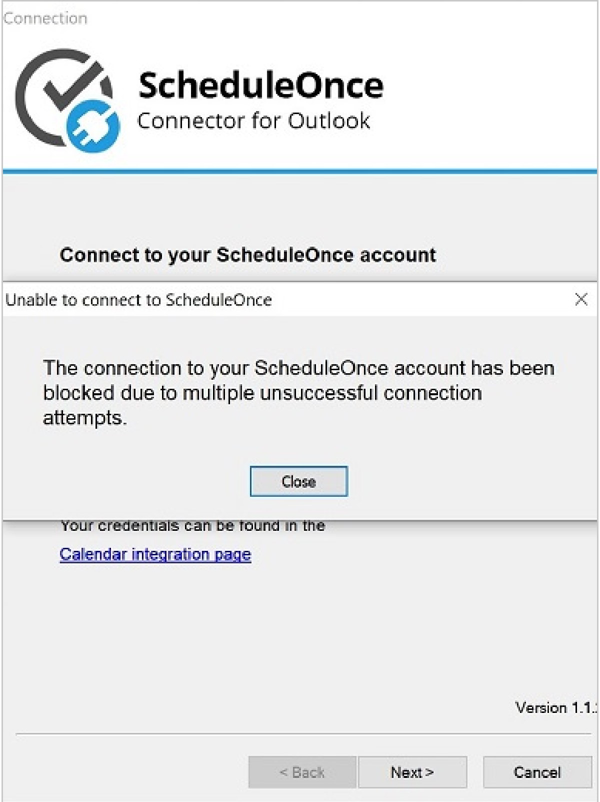


Figure 4: Multiple unsuccessful connection attempts

5. The **Calendar** step appears and displays all calendars in your Outlook calendar (see Figure 5). These can be local calendars, Exchange Calendars, resource calendars, or any other calendars that are shared with you.

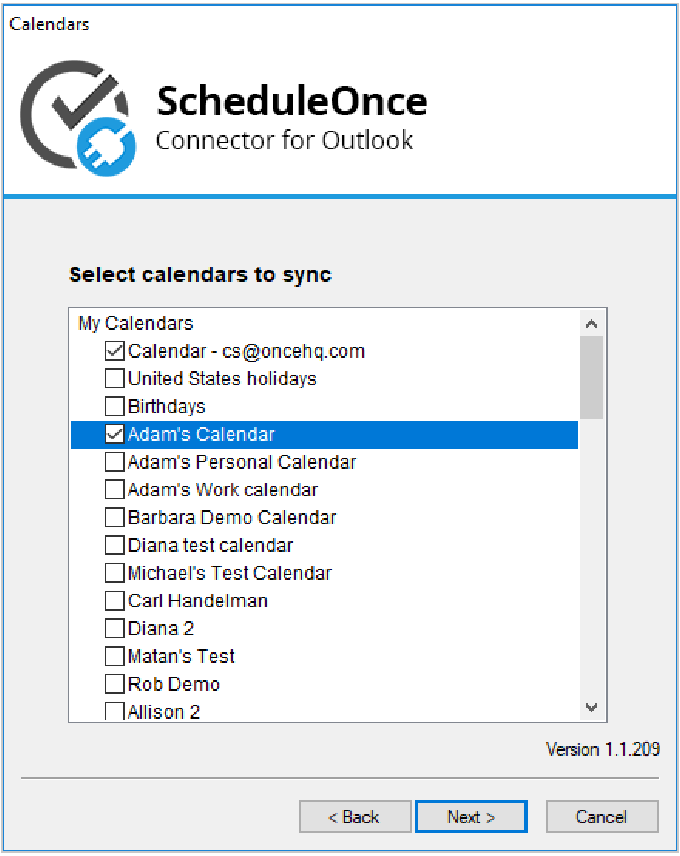


Figure 5: Calendar step

> **Note:**
>
> Calendars that cannot be selected are calendars for which you do not have full read/write permissions. These calendars cannot be synced with OnceHub. If you do want to connect to one of these calendars, you can ask the calendar owner to grant you full read/write permissions.

6. Select the calendars you want to sync and click **Next**. The selected calendars will be synced with OnceHub and will appear in your OnceHub account under **Setup -> Booking pages -> Associated calendars** section in your Booking pages. Calendars that are not selected will never be synced with OnceHub.
7. After you click **Next**, the **Select sync mode** step displays the various options for syncing between your Outlook Calendar and OnceHub: real-time (recommended), auto-sync every X minutes/hours, and manual (see Figure 6). Learn more about Outlook sync modes

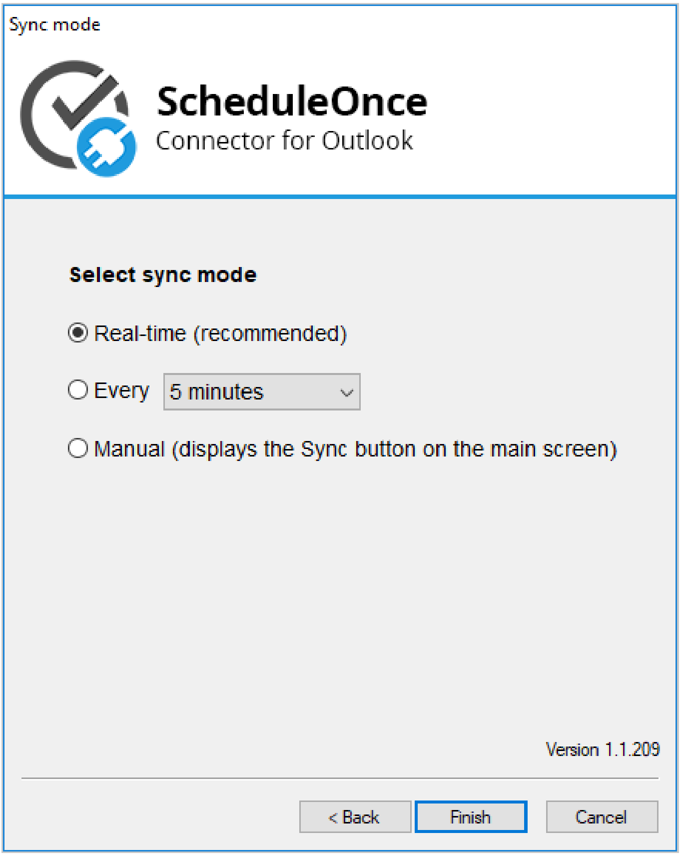


Figure 6: Sync mode

8. Select a sync mode and click **Finish**. The connector will perform an initial sync that may take a few minutes, depending on the number of calendars you have and how busy they are. Now simply refresh the browser in your OnceHub account (see Figure 7).

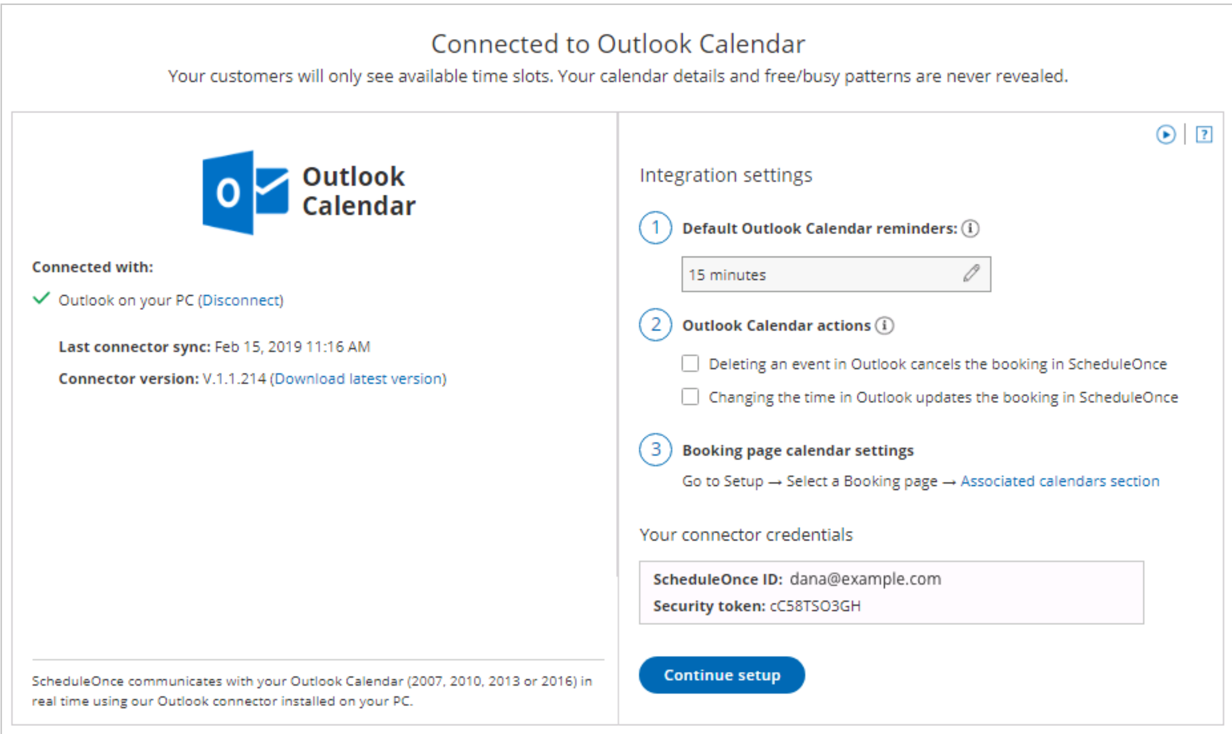


Figure 7: Connected to Outlook Calendar

9. Your OnceHub account and Outlook Calendar are now connected. You can receive reminders in your connected

Outlook Calendar when events are created via OnceHub. By default, the reminders are set to *15 minutes*.

To configure default Outlook Calendar alerts, simply select an option from the **Default Outlook Calendar reminders** drop-down list (see Figure 8).

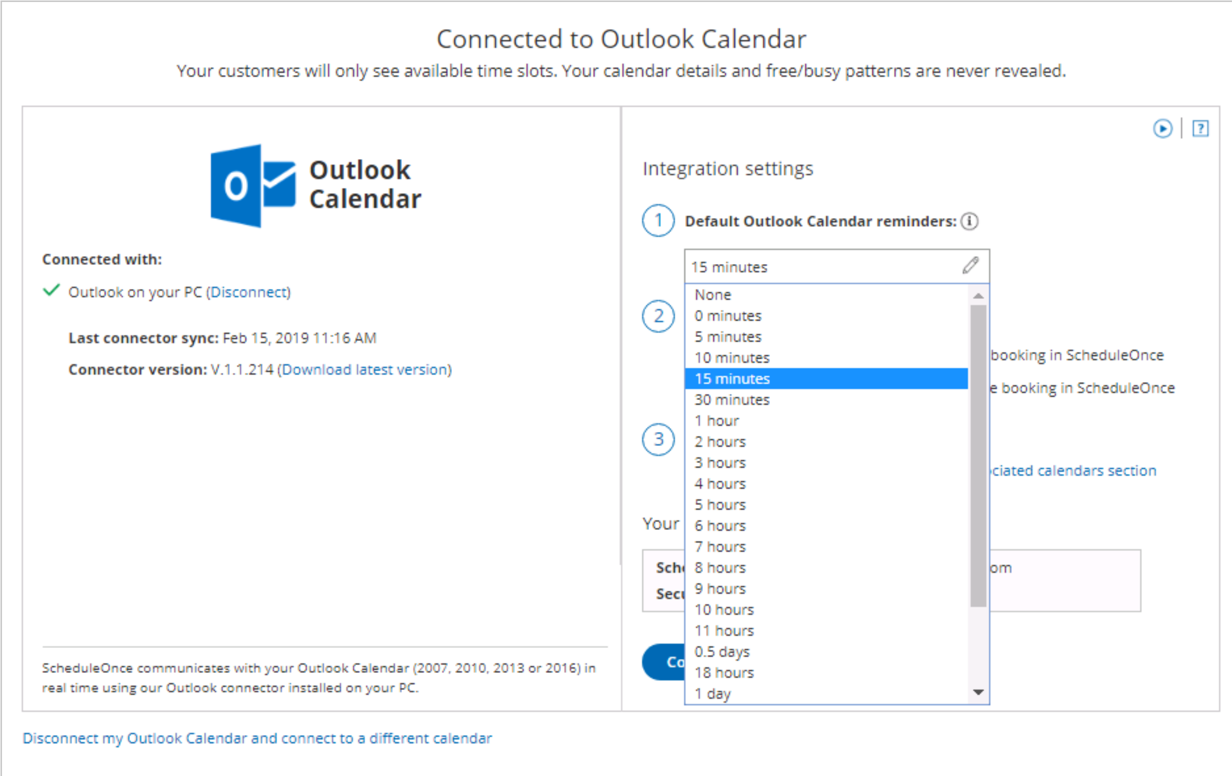


Figure 8: Default Outlook Calendar reminders

10. The following settings allow you to determine whether changes made in your connected calendar are reflected in OnceHub or not (see Figure 9). Learn more about Outlook Calendar actions

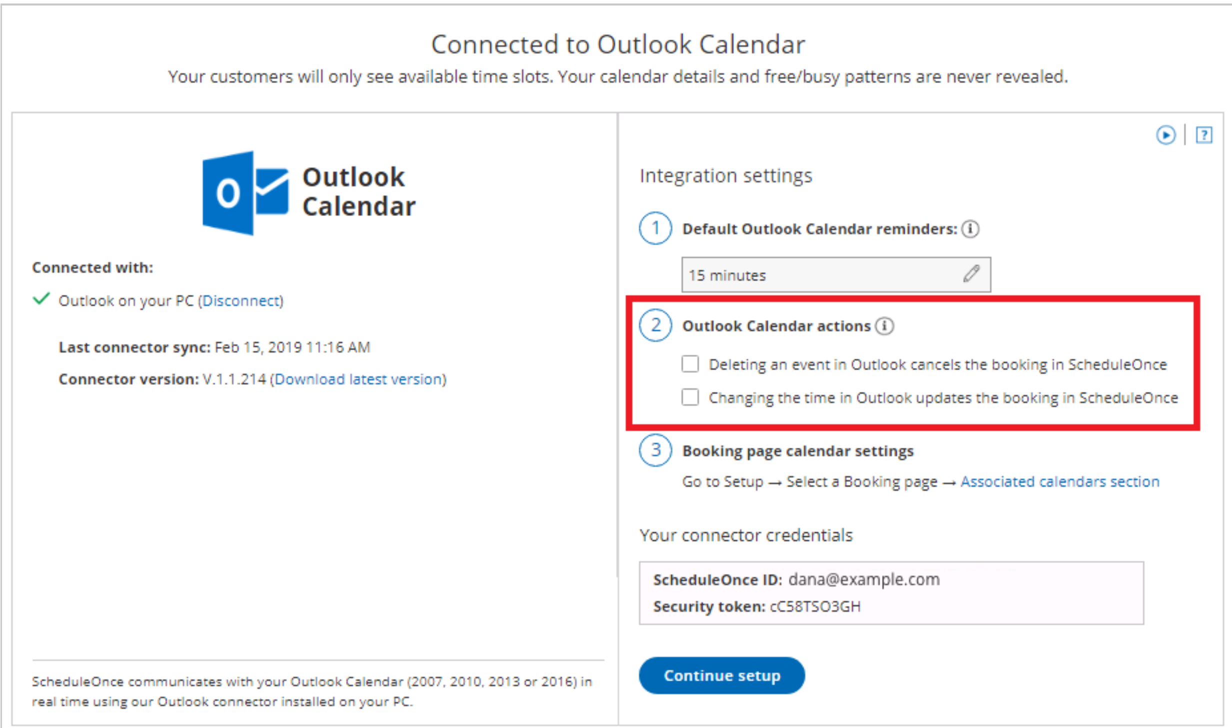


Figure 9: Outlook Calendar actions

Congratulations! Your connector is configured and you can now configure the Associated calendar settings on your Booking pages.

Outlook connector FAQs

Last Modified on Oct 18, 2022

In this article, you'll find answers to some of the most common questions related to your PC connector for Outlook

Frequently asked questions

How does OnceHub connect with Outlook Calendar?

OnceHub uses a proprietary connector to establish a secure connection with your Outlook Calendar. Before you can use the OnceHub connector for Outlook, you must install the connector, configure the connector and perform a first sync and configure the Associated calendar settings for your Booking pages.

Important:

After you download the OnceHub connector for Outlook, you are in a pending connection state with your Outlook Calendar and you will not be able to accept bookings until you install the connector and perform the first sync.

What are the system requirements for the connector?

The PC connector for Outlook is compatible with Microsoft Outlook 2007, 2010, 2013, and 2016 on a Windows PC using Windows Vista, Windows 7, Windows 8, or Windows 10. The connector is not compatible with Mac OS X. It is also not compatible with Windows XP, due to XP's outdated security support.

Can I set up the connector with Exchange, Office 365, and Outlook.com?

Yes, you can, so long as you have added that calendar to the Outlook client software on the desktop. The PC connector for Outlook is compatible with Outlook 2007, 2010, 2013, and 2016.

Which Outlook calendars can I sync with OnceHub?

You can sync any calendar available in your Outlook Calendar. These can be local calendars, Exchange calendars, resource calendars, or any other calendars that have been shared with you with full read/write permissions.

Can I use shared calendars?

When configuring the Outlook connector, you select the shared calendars that you want to sync with OnceHub. Calendars that do not have a checkbox next to them are those calendars to which you do not have full read/write permissions. These calendars cannot be synced with OnceHub.

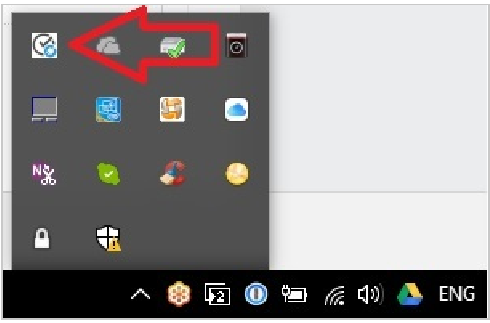
If you do want to connect to one of these calendars, you can ask the calendar owner to grant you full read/write permissions to this calendar. After performing an initial sync, the Associated calendars section on your OnceHub Booking page(s) will list the shared calendars that you have selected for syncing.

Can I set default Outlook Calendar reminders when events are created via OnceHub?

Yes, you can configure default Outlook Calendar reminders in the connected Outlook Calendar. To do so, in your OnceHub account, click on your **profile pic or initials** and select **Calendar connection**. On the **Connected to Outlook Calendar** page, simply select an option from the **Default Outlook Calendar reminders** drop-down list.

Does my Outlook or the connector need to be open on my Desktop in order for the connector to sync?

No, you don't need to have Outlook or the connector open for the connector to sync. However, you must have the OnceHub connector in the system tray icons for the sync to run automatically.



Can I cancel and reschedule in Outlook?

Yes. The PC connector for Outlook can be set to allow you to cancel or reschedule directly in your connected calendar, while all bookings remain updated in OnceHub.

How secure is the connector?

All communication between the connector and the OnceHub servers are done over HTTPS. The security token used to establish the secure connection between the connector and OnceHub is tokenized to MD5 hash. Learn more about the connector's security details

How do I disconnect from OnceHub from my Outlook Calendar?

To disconnect OnceHub from your Outlook Calendar, go to **Setup** -> Open left sidebar -> **Integrations** -> **Calendar integration** in your OnceHub account. Click the **Disconnect my Outlook Calendar and connect to a different calendar** link. Once you have done this, you can also uninstall the connector as you would uninstall any Windows program.

Important:

If you plan to continue using OnceHub, you should only disconnect your calendar integration from Outlook if you are no longer using it. You should not disconnect your Outlook Calendar if you are intending to reconnect it to the same calendar immediately after. Any current bookings made before disconnecting will read as manual events on your Outlook Calendar upon reconnection, rather than as OnceHub events. This means that any subsequent updates to them, such as canceling a booking, will not update your Outlook Calendar and reminders for these bookings will not be sent.

Can the connector work with a proxy server?

Yes, it can. Learn more about using the connector with a proxy server

Outlook connector sync modes

Last Modified on Oct 18, 2022

When you configure the Outlook connector on your PC, you can select different sync options between your Outlook Calendar and OnceHub.

In this article, you will learn about the different sync options.

There are three options to sync your connector with Outlook:

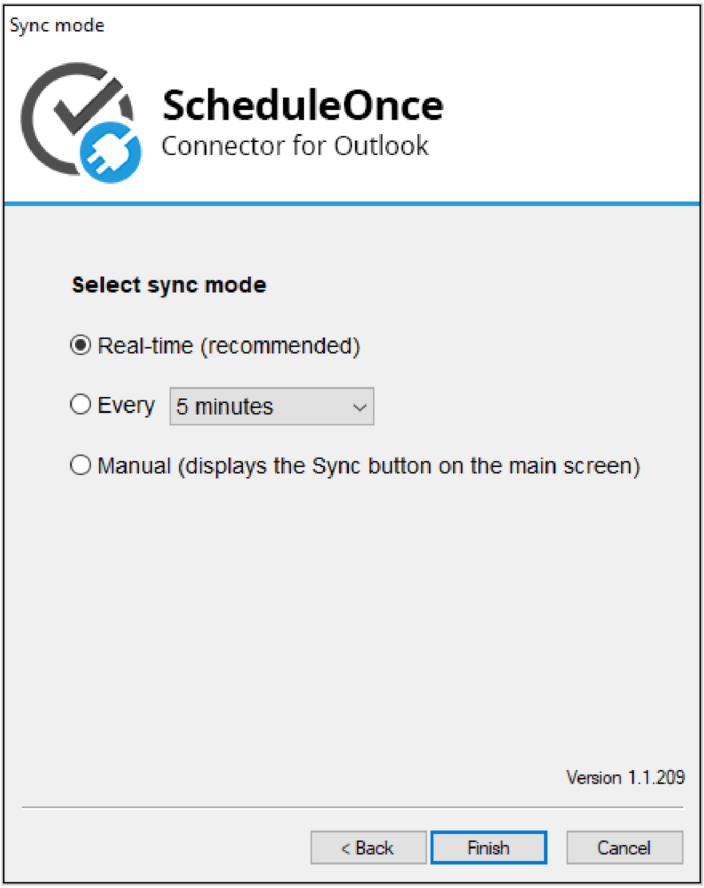


Figure 1: Sync mode options

- **Real-time**: The connector will automatically push to OnceHub any change made to calendar appointments in the calendars that you have selected to sync with OnceHub. When a booking is made in OnceHub, it will automatically sync and populate your relevant Outlook Calendar. The real-time option is the default selection and is recommended unless there are specific environmental factors affecting its functionality.

Note:

The connector uses the **XMPP messaging protocol that uses ports 5222 and 5223** to sync in real time. If the protocol or the ports it uses are blocked by your company's firewall, communications between OnceHub and Outlook will not be allowed. In this case, you should contact your IT administrator to enable the protocol or choose the auto-sync mode.

- **Auto-sync every X minutes/hours**: The connector will sync every time interval that you choose. You can select from the following values: 1 min, 5 min, 15 min, 30 min, 45 min, 1 hr, 2 hrs, 3 hrs 4 hrs, 5 hrs, 10 hrs, 24 hrs.

- **Manual sync**: When you choose to sync manually, a **Sync** button will be added to the connector. Manual sync mode is useful for testing and is not a recommended sync mode.

Security details for the Outlook connector

Last Modified on Oct 18, 2022

The connector was designed to facilitate a secure connection between your Outlook calendar and OnceHub servers. All communication between the connector and the OnceHub servers are done over HTTPS using TLS protocol. The security token used to establish the secure connection between the connector and OnceHub is tokenized to MD5 hash.

How does the connector communicate with Outlook Calendar?
The connector communicates with Outlook Calendar via the Outlook API, MAPI, and Extended MAPI.

Which ports does the connector use to communicate with OnceHub?
The connector uses the standard HTTP and HTTPS ports (80 and 443). When Real-time sync is used, the connector also uses the XMPP protocol, requiring ports 5222 and 5223. If the connector is being blocked by your firewall, it is probably because the XMPP ports (5222 and 5223) are blocked. You can ask your IT department to open these ports or switch the sync mode to Auto-sync which does not require the XMPP ports.

Which Windows users can install the connector?
The connector can be installed by both Windows Users and Administrators.

Can the connector work with a proxy server?
Yes, it can. Learn more about using the connector with a proxy server

What happens when I disconnect from Outlook or delete my OnceHub account?
When you disconnect from your Outlook Calendar or delete your OnceHub account, all your non-OnceHub Outlook Calendar appointment data is erased from the OnceHub servers. Please note that if you plan to continue using OnceHub, you should only disconnect your Outlook calendar if you are no longer using it. You should not disconnect your Outlook Calendar integration if you intend to immediately reconnect to the same calendar. Any current bookings made before disconnecting will read as manual events on your Outlook calendar, rather than as OnceHub events upon reconnection. This means that any subsequent updates to them, such as cancellation, will not update your Outlook Calendar and reminders for these bookings will not be sent.

Can I shut down the computer on which the connector is installed?

Last Modified on Oct 18, 2022

If your computer is the only way in which your Outlook Calendar is accessed, you can shut it down and no double bookings will be created. When you turn the computer back on, it will automatically perform a sync to make sure that your Outlook Calendar is updated with any bookings that were made via OnceHub when your computer was turned off.

However, If your Outlook calendar can be updated by other methods and not only via your PC, closing the computer on which the connector is installed or disconnecting it from the internet might result in double bookings in the following cases:

- You are also accessing your Exchange Calendar from a mobile device
- You are also accessing your Exchange Calendar from the Outlook web interface
- You are using OnceHub with calendars that have been shared with you and can be updated by the calendar owners

In the above cases, the PC on which the connector is running should not be turned off.

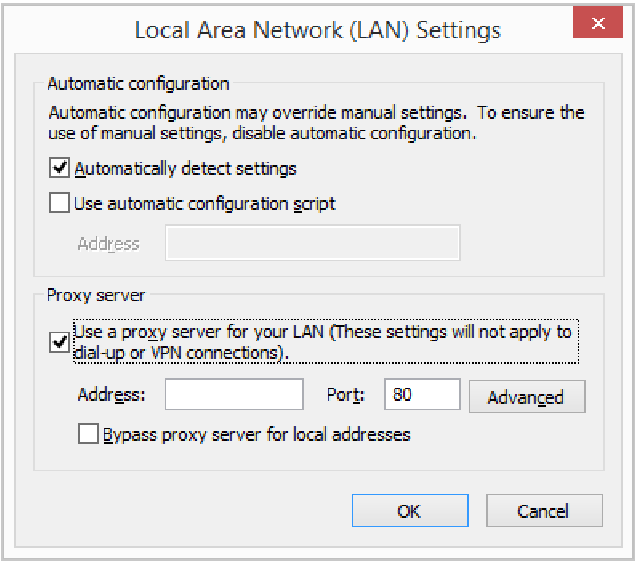
If you are seeing double bookings in your Outlook Calendar, please check suggestions in our troubleshooting article for when the connector is not syncing as expected.

Using the Outlook connector with a proxy server

Last Modified on Feb 15, 2019

If your organization is using a proxy server to access the internet, you will need to take additional configuration steps for the connector to work in your environment:

1. In your Internet Explorer browser, go to **Tools** in the top right corner of the screen -> **Internet options** -> **Connections** tab -> click the **LAN settings** button and enter the details of your proxy server:

   You must do this in Internet Explorer because Internet Explorer updates the Windows operating system with this data, which also makes it available to the connector.

2. Restart the connector and check if it can sync successfully. If it still displays the message that it cannot connect to the internet, ask your IT department to do the following:

   - Make sure that the following ports are open on the proxy and/or the firewall: HTTP and HTTPS ports (80 and 443). When real-time sync is used, the connector also uses the XMPP protocol that uses ports 5222 and 5223.
   - Make sure that the firewall is set to permit the connector process name: scheduleoncec4o.exe

Disabiling compatibility view in Internet Explorer

Last Modified on Oct 18, 2022

If you are using Internet Explorer (IE) and having trouble displaying OnceHub pages, you may be unknowingly working in Internet Explorer's compatibility view. The compatibility view displays web pages as if they were viewed in an old browser, such as Internet Explorer (IE) 7, which is not supported by most modern web applications.

In order to turn off the Compatibility Display function, take the following steps:

1. Open the menu bar by pressing ALT.
2. Click on the **Tools** tab in the top right corner of the screen.
3. Click on **Compatibility View settings**.
4. If OnceHub.com appears in the box titled **Websites you've added to Compatibility View**, select it and then click the **Remove** button.
5. If there is a checkmark in the box for **Display all websites in Compatibility View**, click the box so that it is left EMPTY.
6. Close all IE windows and then restart IE.
7. Go back to OnceHub and see if pages now display correctly.

You can also see this article for a more detailed explanation:
http://www.sevenforums.com/tutorials/1196-internet-explorer-compatibility-view-turn-off.html

Switching from the PC connector for Outlook to Office 365 integration

Last Modified on Jan 7, 2024

We generally recommend switching from our PC connector for Outlook to our direct Office 365 calendar connection. In all cases, switching is completely safe and all booking data persists.

Who can switch?

Any OnceHub User whose email account is on Office 365. However, the Office 365 Calendar integration does not support resource calendars and shared calendars for OnceHub yet.

If you're using Exchange, you should connect your calendar using our Exchange integration.

What happens when I switch?

When you switch, only the connection method is replaced, while the connected calendars remain the same. You are essentially reconnecting via another method to the same email account with the same calendars.

For Users that **only use their default calendar**, busy time will still be retrieved from the same default calendar. All existing bookings will remain in the default calendar, and new bookings will keep being added to the default calendar.

How do I switch?

Follow these steps to switch from the PC connector to a direct Office 365 Calendar connection.

1. Select your profile picture or initials in the top right-hand corner → **Profile settings** → **Calendar connection**.
2. Click the **Disconnect** link and approve the disconnection in the confirmation pop-up.
3. You can now connect OnceHub to your Office 365 Calendar using an encrypted OAuth 2.0 connection.
4. After you've connected your Office 365 Calendar, go to the Date-specific availability section of your Booking page and click to verify your busy time is retrieved from your connected calendar.
5. Go to the Associated calendars section of your Booking page to select the calendars that you wish to use.
6. Make a test booking on your Booking page to see the event created in your calendar.
7. Optional: If you wish to uninstall the Outlook connector from your PC, you may do so by following Steps 1-4 in the connector upgrade article.

That's it – you're done! Congratulations on your brand new direct connection to your Office 365 calendar.

Payment integration throughout the booking lifecycle (collecting payments from Customers)

Last Modified on Nov 1, 2024

Note:

This article only applies if you use our PayPal integration to collect payments from your Customers. If you have any questions on how we bill you as a OnceHub Customer, go to the Account billing article.

OnceHub has partnered with PayPal to offer payment integration through all phases of the booking lifecycle. From the initial booking, through to rescheduling and cancellations, you can increase sales, generate additional revenue streams, and reduce administrative overhead (Figure 1).

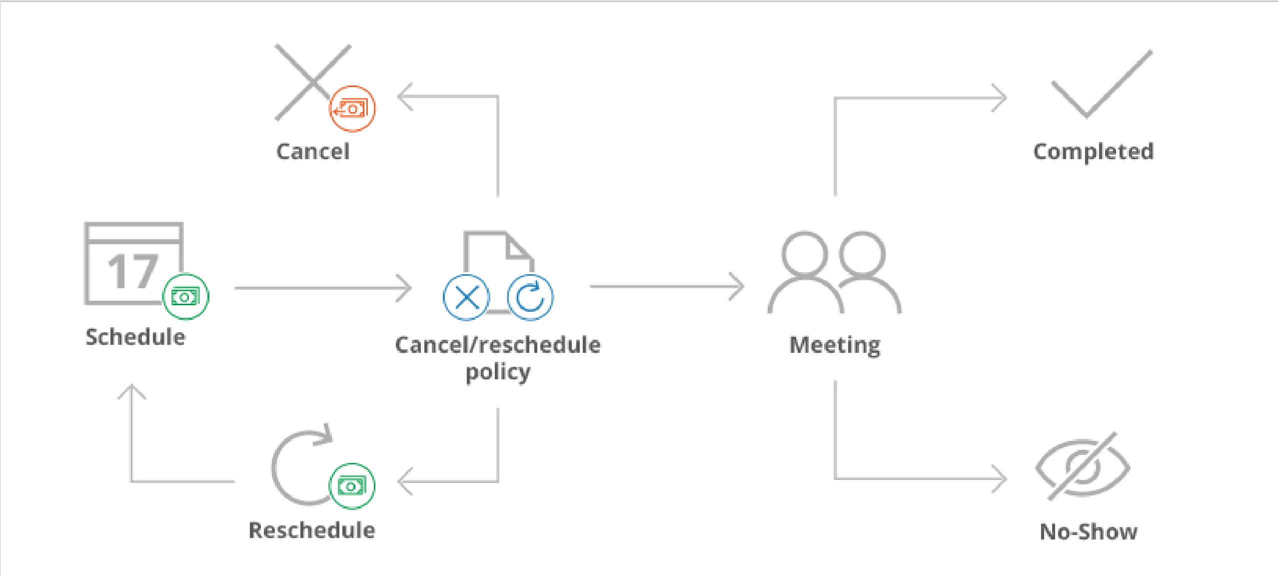


Figure 1: Payment integration throughout the booking lifecycle

Accept secure payments

The OnceHub connector for PayPal allows you to collect payments as an integral part of your booking process. Customers can pay for your services using a credit/debit card or a PayPal account. Simply connect your PayPal account, configure your payment settings, and OnceHub takes care of all payment activities in an automated and secure manner.

You can accept secure payments when:

- **Customers make a booking**: You can collect payment for your services in any currency you have in your PayPal account.
- **Customers reschedule a booking**: The Reschedule policy can stipulate that Customers will be charged a reschedule fee based on the remaining time before the scheduled meeting. Charging for rescheduling actions generates an additional revenue stream and reduces unnecessary rescheduling.

Automatic refunds

Automatic refunds allow you to build trust and increase Customer satisfaction when sessions are canceled. Partial or full refunds are instantly credited back to Customers based on the cancellation policies you define.

Manual refunds

OnceHub allows you to issue refunds directly from the Activity stream. When enabled in the Payment settings, Users can refund Customers when they initiate a booking cancellation or send a request to reschedule.

Integrated transaction data

Transaction data and payment actions are integrated into User workflows. Payment data appears in context with scheduling activities in the Payment details tab of the Activity stream. You can also access detailed Revenue reports that provide full visibility into transactions throughout the booking lifecycle. Scheduling activities are presented side by side with correlating payment and credit transactions in one central location.

The OnceHub connector for PayPal (collecting payments from Customers)

Last Modified on Nov 1, 2024

Note:

This article only applies if you use our PayPal integration to collect payments from your customers. If you have any questions on how we bill you as a OnceHub customer, go to the Account billing article.

The OnceHub connector for PayPal allows you to collect payments as an integral part of your booking process. You only need to connect your PayPal account, configure payment settings, and OnceHub takes care of all payment activities in an automated and secure manner.

Note:

When your PayPal account is connected to OnceHub, customers can usually pay with their **credit/debit card** or with their **PayPal account**. A PayPal account on the customer end is not required. Due to the limitations of PayPal's checkout process, we cannot guarantee that all of your customers will be offered the option to pay via debit or credit card without using a PayPal account.

The ability to offer two payment methods - **Traditional cards and PayPal** - increases sales and improves customer satisfaction.

When you are connected to PayPal, you can define a cancel/reschedule policy for your Event types and set the fees and refund rates for canceling or rescheduling a single session, or multiple sessions within a package. This allows you to automatically refund customers when they cancel, or charge them a reschedule fee when they reschedule.

Important:

Although OnceHub communicates with your PayPal account, it is not party to the transaction and does not store or process credit card or financial data. Transactions are only processed and managed by PayPal. Security and PCI compliance for any card data provided by your customers is under PayPal's responsibility. Learn more about Payment integration terms of use

Connecting to PayPal

Before you can begin accepting payments for your Event types, you must connect OnceHub to your PayPal account.

1. First you must accept the OnceHub terms of use. In addition to the fee charged by PayPal, OnceHub will charge a 1% transaction fee for each payment made via OnceHub.
2. Then you must connect to PayPal. This will grant permissions to OnceHub to run specific transactions via the PayPal API. The integration allows you to charge customers for bookings, issue refunds via OnceHub, and capture transactions in OnceHub invoicing and Revenue reports.
3. Then you must allow automatic billing. This will allow OnceHub to charge the 1% transaction fee for payments made via OnceHub.

Customizing payment settings

When using Payment integration, you can customize the Refund settings, the Currency settings, and the Invoice settings for your OnceHub account. Learn more about customizing payment settings

Using Payment integration

In the **Event type -> Payment and cancel/reschedule policy** section, you can define the Event type price, the customer cancellation policy, and the customer reschedule policy when accepting payments via OnceHub. For example, you can choose to charge 10% of the event type price when customers reschedule a booking or automatically issue a refund of 100 USD when customers cancel the booking a week before the meeting time. Learn more about configuring Payment and Cancel/reschedule settings

Troubleshooting

If you experience any issues with your PayPal integration, please read our troubleshooting article. This article outlines common issues and solutions for these issues.

Connecting OnceHub to PayPal (collecting payments from Customers)

Last Modified on Oct 18, 2022

Note:

This article only applies if you use our PayPal integration to collect payments from your Customers. If you have any questions on how we bill you as a OnceHub Customer, go to the Account billing article.

The OnceHub connector for PayPal allows you to collect payments and issue refunds as an integral part of your booking process. This allows you to automatically refund customers when they are canceling, or charge them a reschedule fee when they are rescheduling. You only need to connect your PayPal account, configure your Payment settings, and OnceHub takes care of all payment activities in an automated and secure manner. Connecting OnceHub to your PayPal account is a three-step process: Accept Terms, Connect to Paypal, and Allow automatic billing.

Note :

You can reduce administrative overheads and align invoices with your branding requirements by customizing the invoice sent to Customers when payment is collected or refunds are processed via OnceHub. Learn more about customizing the Invoice settings

In this article, you will learn how to connect OnceHub to your PayPal account.

Requirements

To connect to PayPal, you will need:

- A OnceHub Administrator
- A PayPal Administrator for your account

The OnceHub connector for PayPal is compatible with any PayPal account. If you don't have a PayPal account, create one now.

Connect to PayPal

Note:

You can only connect OnceHub to one PayPal account at a time. If you're already connected to a PayPal account, you will need to disconnect first before you can connect a different PayPal account .

1. Hover over the lefthand menu and go to the Booking pages icon → open the lefthand sidebar → **Integrations → Payment**.
2. Click the **Get started** button (Figure 1).

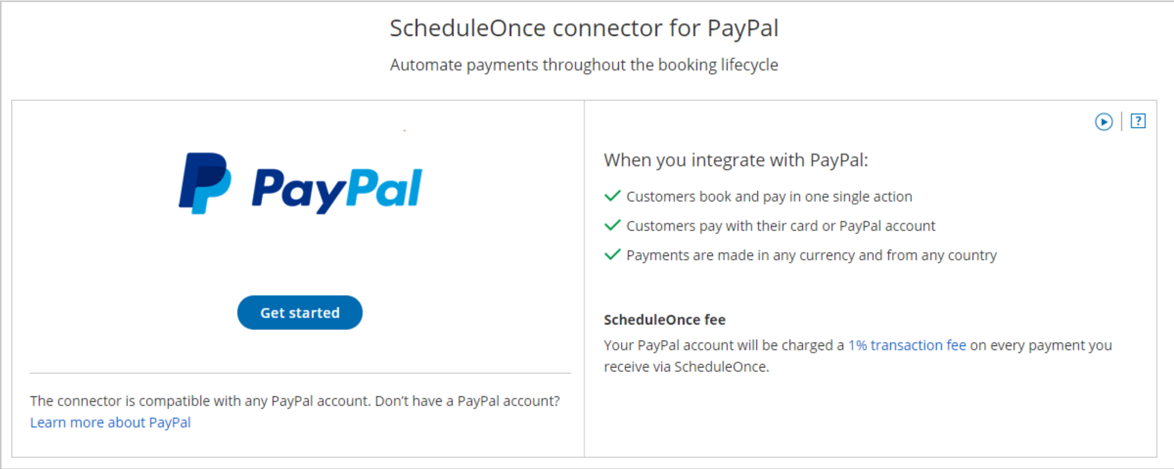


Figure 1: Paypal integration

3. The **Connect to PayPal** wizard pop-up appears. Read the terms and click the **Accept and continue** button (Figure 2). OnceHub will charge a 1% transaction fee for payments made via OnceHub.

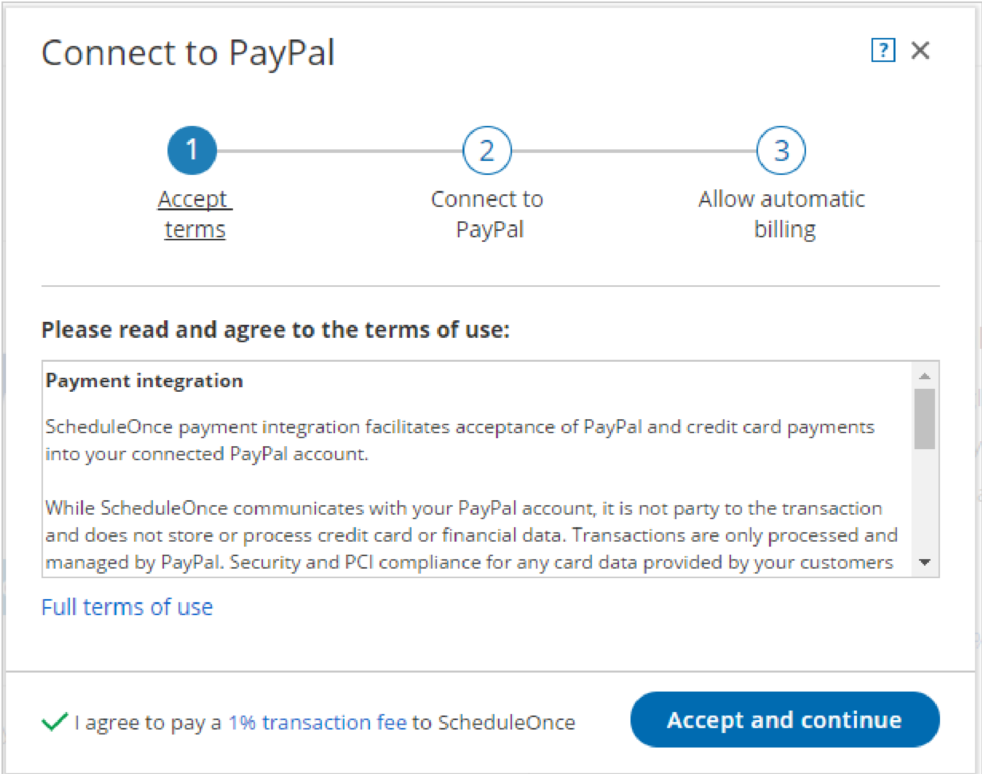


Figure 2: Accept terms

4. In the **Connect to PayPal** step, click the **Connect to PayPal** button. Note that if you do not have a PayPal account, you will be prompted to create one - it takes only a couple of minutes. (See Figure 3) This will allow OnceHub to access your PayPal account via the PayPal API. Learn more about granting permissions to OnceHub

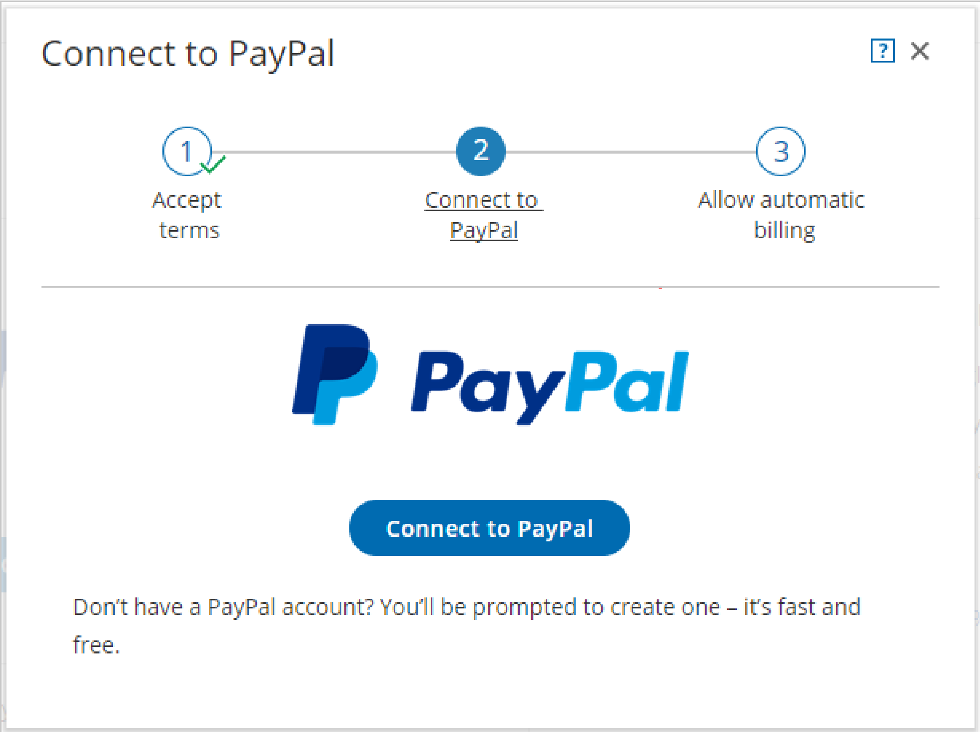


Figure 3: Connect to PayPal

> **Note:**
>
> If you do not have a PayPal account, you will be prompted to create one. If you have a PayPal Personal account or a Premier account, PayPal will automatically upgrade your account to a free PayPal Business account as part of the connection process.

5. After connecting to your PayPal account and granting permissions to OnceHub, you are automatically redirected to your OnceHub account to allow automatic billing (Figure 4). Automatic billing authorizes OnceHub to charge a 1% transaction fee for each payment made via OnceHub, in addition to the fees charged by PayPal.

> **Note:**
>
> To connect OnceHub to your PayPal, you must use the **same** PayPal account when granting permissions to OnceHub and when allowing automatic billing.

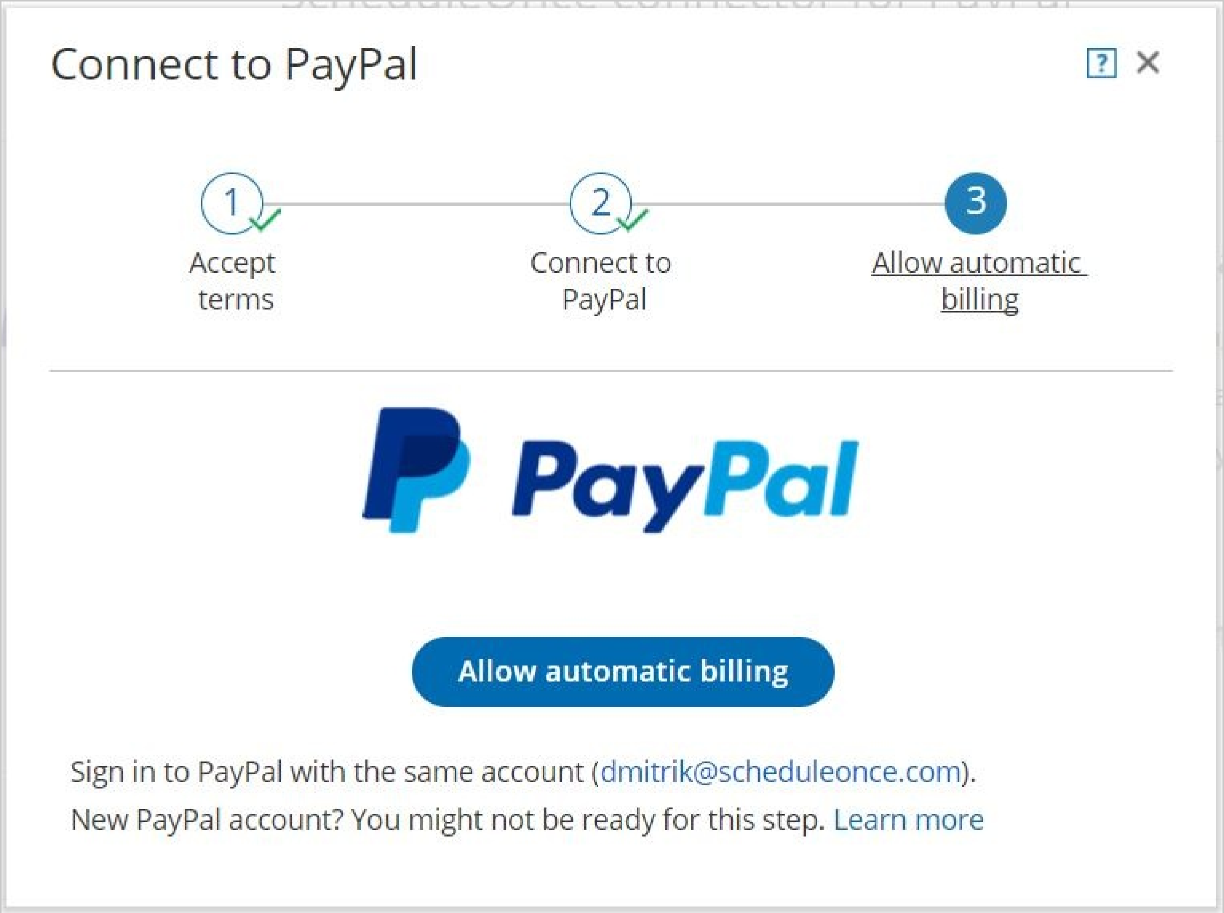


Figure 4: Allow automatic billing

6. Once you allow automatic billing, your connected PayPal account will display a confirmation message informing you that you have agreed to allow OnceHub to charge your account for future received payments, using the funding sources in your PayPal account (Figure 5).

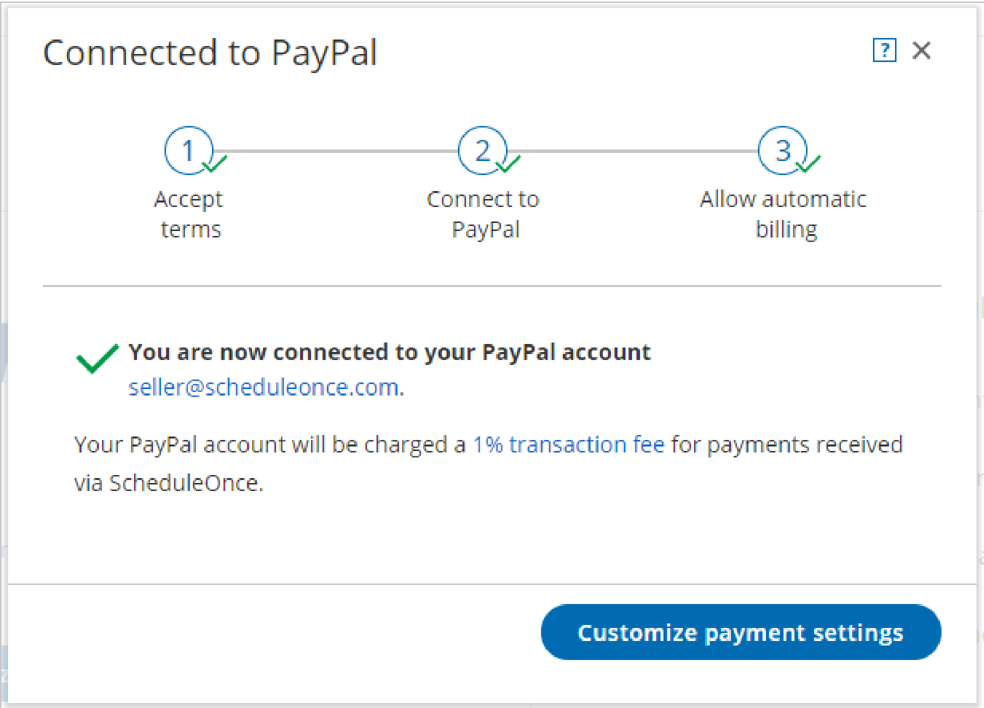


Figure 5: Confirmation message

Congratulations! Your OnceHub User app is now connected to your PayPal account. Next you can customize the payment settings for your account.

Granting permissions to OnceHub (collecting payments from Customers)

Last Modified on Oct 18, 2022

Note:

This article only applies if you use our PayPal integration to collect payments from your Customers. If you have any questions on how we bill you as a OnceHub Customer, go to the Account billing article.

To connect the OnceHub User app to your PayPal account, you must connect to PayPal and grant permissions to OnceHub to run specific transactions via the PayPal API. OnceHub communicates with the PayPal API to charge Customers for bookings, issue refunds via OnceHub, and capture transactions in OnceHub invoicing and Revenue reports.

Note:

You can reduce administrative overheads and align invoices with your branding requirements by customizing the invoice sent to Customers when payment is collected or refunds are processed via OnceHub. Learn more about customizing the Invoice settings

In this article, you will learn about granting permissions to OnceHub in your PayPal account.

Requirements

To grant permissions to OnceHub, you will need:

- A PayPal Administrator
- A OnceHub Administrator

Granting permissions to OnceHub

1. Hover over the lefthand menu and go to the Booking pages icon → open the lefthand sidebar → **Integrations → Payment**.
2. Click the **Get started** button. The **Connect to PayPal** wizard pop-up appears (Figure 1).

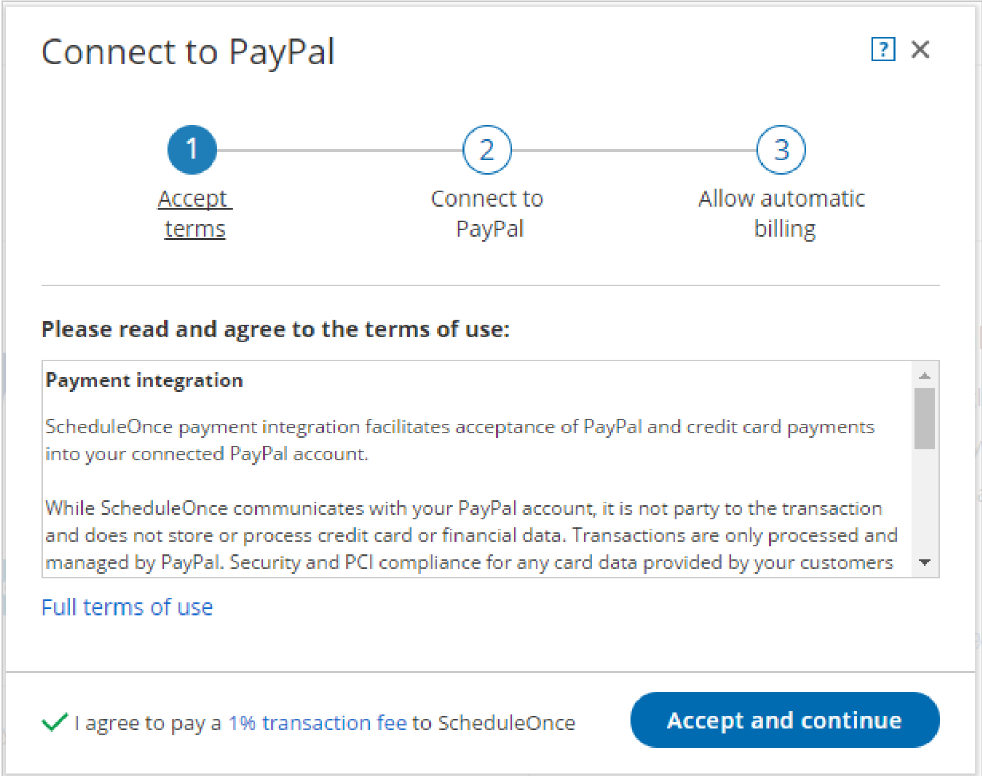


Figure 1: Accept Terms

3. Once you accept the OnceHub terms, click **Connect to PayPal** button on the **Connect to PayPal** step (Figure 2).
   You will be redirected to the PayPal sign-in page where you'll be required to enter your credentials.

> **Note:**
>
> If you do not have a PayPal account, you will be prompted to create one. If you have a PayPal Personal account or a Premier account, PayPal will automatically upgrade your account to a free PayPal Business account as part of the connection process.

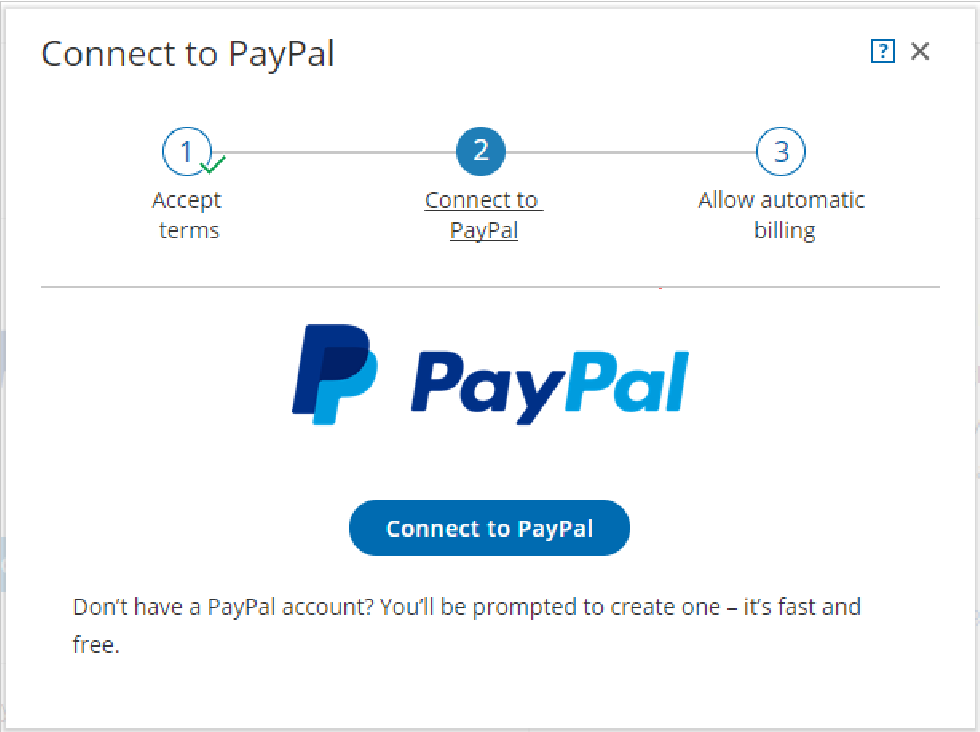


Figure 2: Connect to PayPal

4. Sign in to your PayPal account using your PayPal credentials or create a new account. Once signed in, PayPal will automatically display a pop-up window including the list of permissions OnceHub needs to be granted

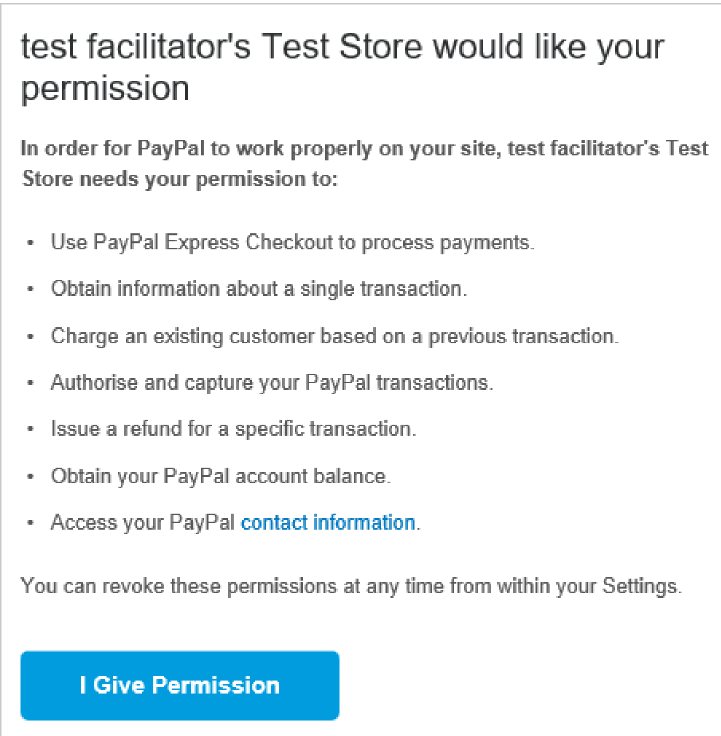


Figure 3: Granting permissions

(Figure 3).

5. In your PayPal account, click the **Grant permissions** button.
   Once permissions are granted, OnceHub will receive a token from PayPal Permissions Service to run **Express Checkout API** calls on your behalf.
6. Next, PayPal will automatically take you through the **In-Context Sign-Up** flow. This allows OnceHub to use the **In-Context API** to determine whether your PayPal account can receive payments.

OnceHub will only charge Customers for bookings if your PayPal account can accept payments. Otherwise, Customers won't be able to make bookings when Payment integration is used. Learn more about troubleshooting Payment integration issues

7. At the end of the **In-Context sign up** flow in PayPal, click the **PayPal return** button to return to OnceHub.

Allowing automatic billing (collecting payments from Customers)

Last Modified on Oct 18, 2022

> **Note:**
>
> This article only applies if you use our PayPal integration to collect payments from your Customers. If you have any questions on how we bill you as a OnceHub Customer, go to the Account billing article.

To connect your OnceHub account to your PayPal account, you must allow automatic billing. When allowed, OnceHub will be able to charge a 1% transaction fee for each payment made via OnceHub, in addition to the fees charged by PayPal. Learn more about the OnceHub Master Services Agreement

Requirements

To allow automatic billing, you need:

- A PayPal Administrator
- A OnceHub Administrator

Allowing automatic billing

1. Hover over the lefthand menu and go to the Booking pages icon → open the lefthand sidebar → **Integrations → Payment**.
2. Click the **Get started** button. The **Connect to PayPal** wizard pop-up appears (Figure 1).

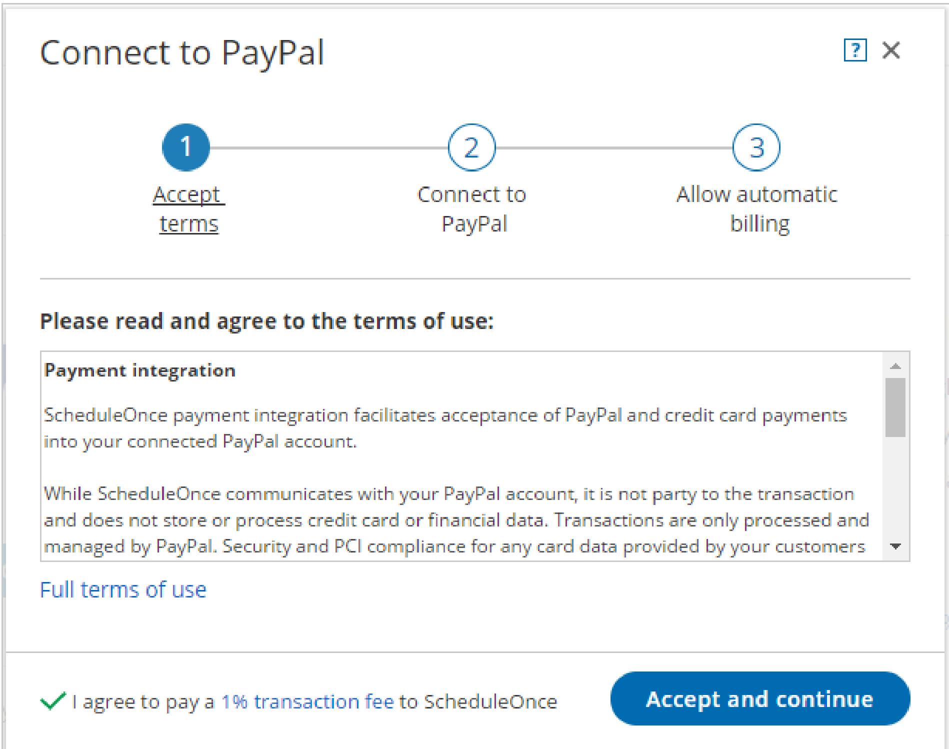


Figure 1: Accept terms

3. Read the terms of use and click **Accept and continue**. OnceHub charges a 1% transaction fee for payments made via OnceHub, in addition to the fees charged by PayPal.
4. In the **Connect to PayPal** step, click the **Connect to PayPal** button (Figure 2). This will allow OnceHub to access your PayPal account via the PayPal API. Learn more about granting permissions to OnceHub

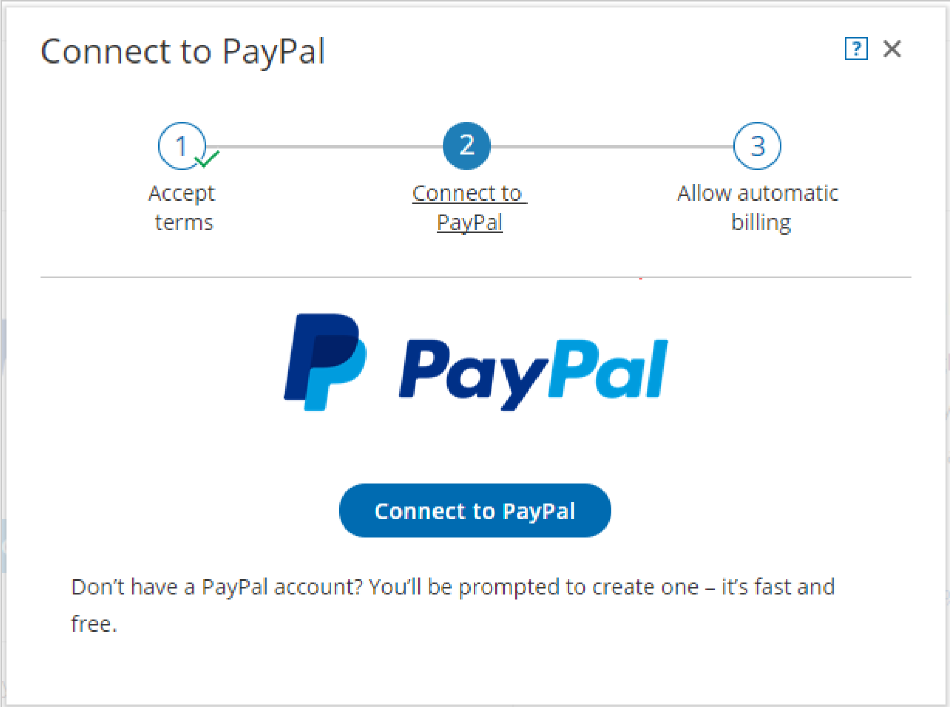


Figure 2: Grant permissions

5. After connecting to your PayPal account and granting permissions to OnceHub, you are automatically redirected to your OnceHub account to allow automatic billing. In the **Allow automatic billing** step, click the **Allow automatic billing** button. You are redirected to PayPal (Figure 3).
   When you allow automatic billing, you authorize OnceHub to charge a 1% transaction fee for each payment made via OnceHub, in addition to the fees charged by PayPal. Learn more about OnceHub Master Services Agreement.

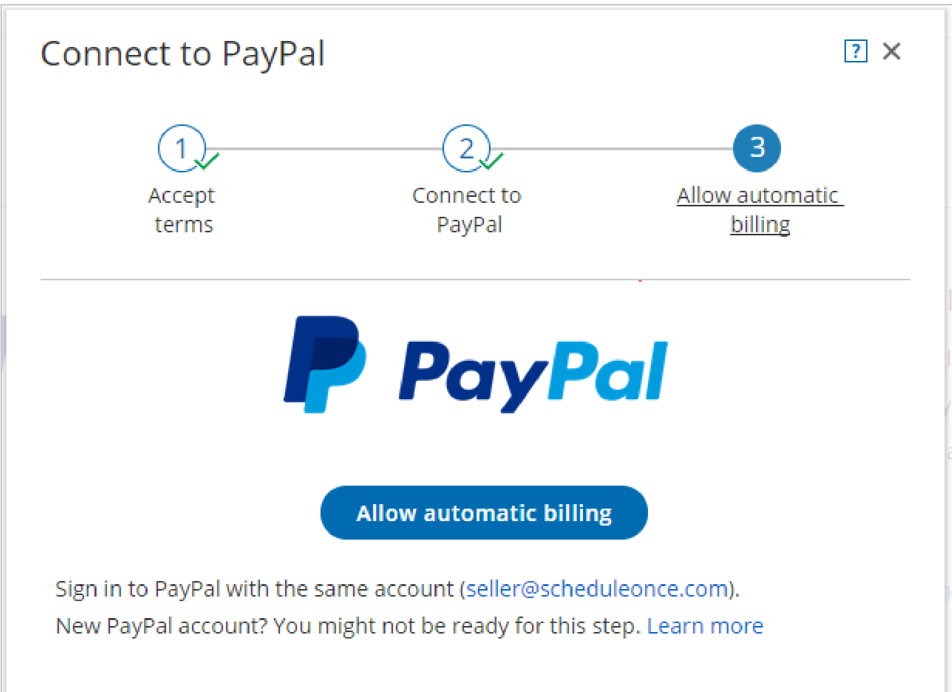


Figure 3: Allow automatic billing

6. Log in to your PayPal account using your PayPal credentials. Once logged in, you will be prompt to allow automatic billing with OnceHub (Figure 4).

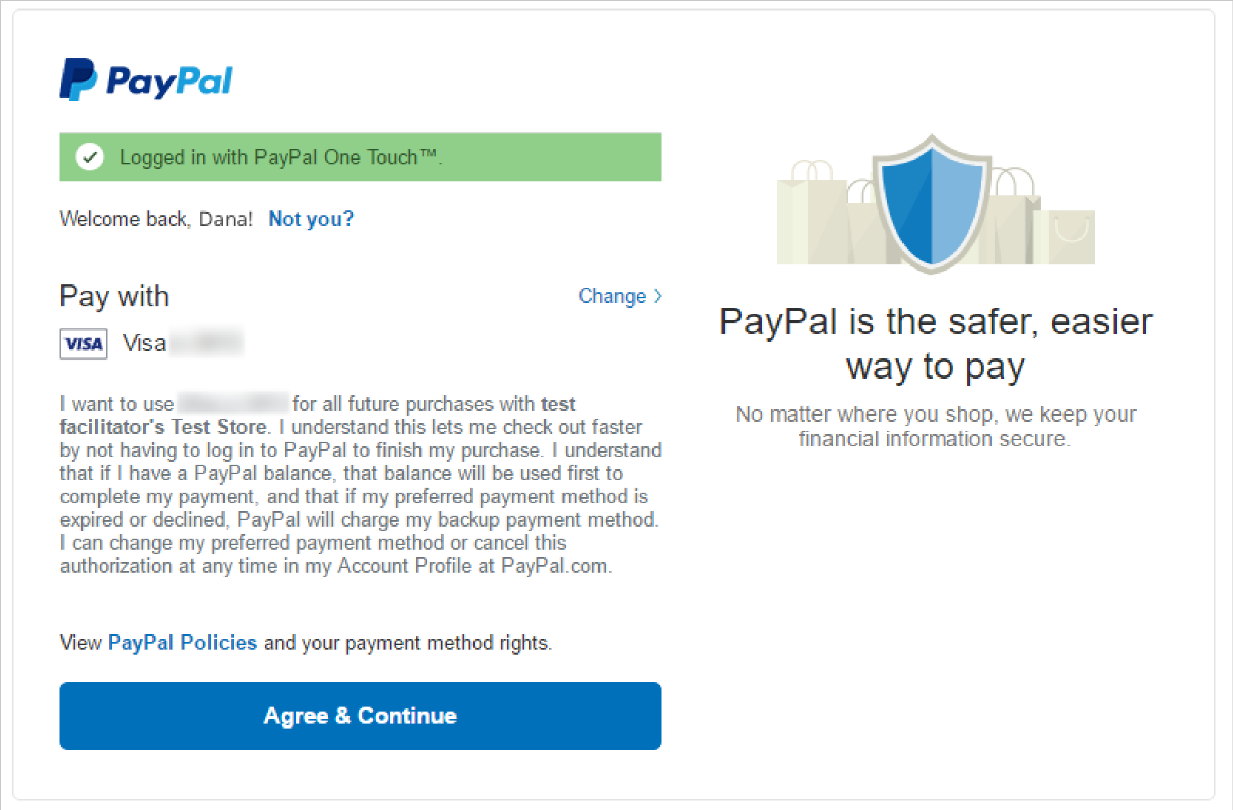


Figure 4: PayPal automatic billing

7. Click **Agree & Continue** to allow automatic billing. Once approved, OnceHub will be able to automatically charge your PayPal account a 1% transaction fee for each payment made via OnceHub.

Important:

Automatic billing authorization remains valid unless you cancel it directly from your PayPal account or disconnect your PayPal account in your OnceHub account.

Congratulations! You have allowed automatic billing. You'll now be automatically redirected to the OnceHub application where you can customize the Payment settings.

Customizing payment settings (collecting payments from Customers)

Last Modified on Oct 18, 2022

Note:

This article only applies if you use our PayPal integration to collect payments from your Customers. If you have any questions on how we bill you as a OnceHub Customer, go to the Account billing article.

The OnceHub connector for PayPal allows you to collect payments and issue refunds as an integral part of your booking process. This allows you to automatically refund Customers when they are canceling, or charge them a reschedule fee when they are rescheduling.

Note:

When your PayPal account is connected to OnceHub, Customers can pay with their **credit/debit card** or with their **PayPal account**. A PayPal account on the Customer end is not required.

The ability to offer two payment methods - **Traditional cards and PayPal** - increases sales and improves Customer satisfaction.

Once you have connected your account to PayPal, you can customize the Payment settings. This allows you to customize the Refund settings, the Currency settings, and the Invoice settings for your OnceHub account.

Refund settings

In this section you can define the way your OnceHub account will handle refunds. Each option will enable or disable Refund options in the Activity stream and in the **Payment and cancel/reschedule policy** section of each Event type. Learn more about configuring the refund settings

Currency settings

In this section you can select the PayPal currencies that will be available in your OnceHub account. The Currency list will appear in the **Payment and cancel/reschedule policy** section of each Event type. Learn more about configuring PayPal currencies

Invoice settings

In this section you can reduce overheads and align with your branding requirements by customizing the invoices sent to Customers when payment is collected or refunds are processed via OnceHub. Learn more about configuring the invoice settings

Customizing refund settings (collecting payments from Customers)

Last Modified on Oct 18, 2022

Note:

This article only applies if you use our PayPal integration to collect payments from your Customers. If you have any questions on how we bill you as a OnceHub Customer, go to the Account billing article.

The OnceHub connector for PayPal allows you to process refunds as an integral part of your booking process:

- Customers can automatically receive refunds when they cancel a booking.
- Users can issue refunds directly from the Activity stream.

In this article, you will learn how to set the refund settings for your account.

Requirements

To customize the Refund settings, you must be a OnceHub Administrator.

Selecting the Refund settings for your OnceHub account

1. Hover over the lefthand menu and go to the Booking pages icon → open the lefthand sidebar → **Integrations → Payment**.
2. Click the **Customize payment settings** button to reach Payment settings.
3. Select the **Refund settings** option for your account (Figure 1).

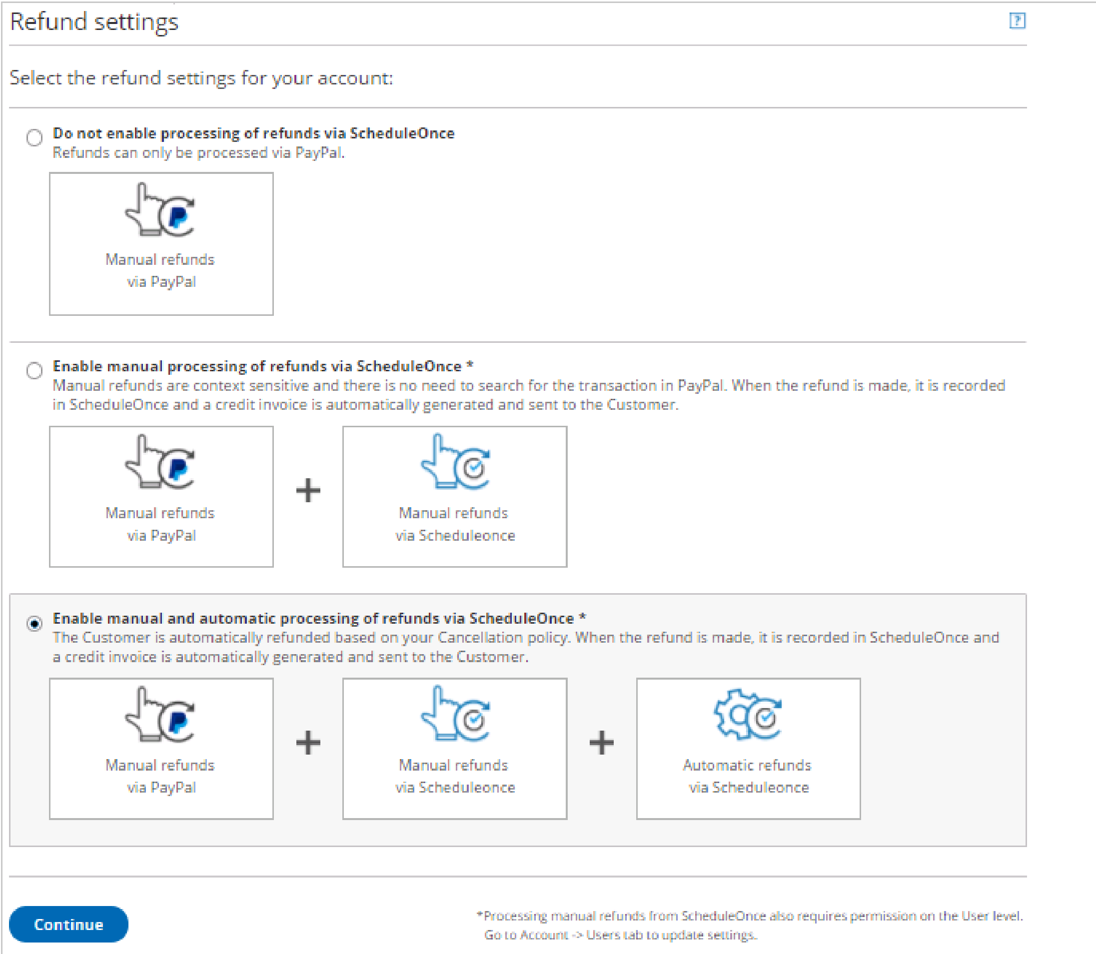


Figure 1: Refund settings

In the **Refund settings** you will have the following options available for your account:

- **Do not enable processing of refunds via OnceHub**: This option is selected by default. If you decide to use this option, Users will be able to issue refunds only via the connected PayPal account.
- **Enable manual processing of refunds via OnceHub**: When choosing this option, Users can issue refunds directly from the Activity stream. Learn more about manual refunds via OnceHub

> **Note:**
>
> In order to issue a refund via OnceHub, you must ensure that the User making the refund has the permission to process manual refunds via OnceHub. Learn more about controlling User refund permissions

- **Enable manual and automatic processing of refunds via OnceHub**: This setting enables all refund options in your OnceHub account and allows you to streamline your refund processes throughout the booking lifecycle. Users can issue refunds directly from the Activity stream, and Customers can be automatically refunded when they cancel a booking on the Customer Cancel/reschedule page. Learn more about automatic refunds via OnceHub

> **Note:**
>
> In order to issue a refund via OnceHub, you must ensure that the User making the refund has the

permission to process manual refunds via OnceHub. Learn more about controlling User refund permissions

Customizing currency settings (collecting payments from Customers)

Last Modified on Oct 18, 2022

Note:

This article only applies if you use our PayPal integration to collect payments from your Customers. If you have any questions on how we bill you as a OnceHub Customer, go to the Account billing article.

The OnceHub connector for PayPal allows you to work with any currency enabled in your PayPal account. In the Currency settings, you can choose the currencies that will be used in your account when collecting payments and processing refunds.

Note:

When your PayPal account is connected to OnceHub, Customers can pay with their **credit/debit card** or with their **PayPal account,** a PayPal account on the Customer end is **not** required.

The ability to offer two payment methods - **Traditional cards & PayPal** - increases sales and improves customer satisfaction

Managing multiple PayPal currencies

OnceHub allows you to use multiple currencies from your PayPal account. This allows you to use different currencies with different Event types, optimizing the payment experience for your global customers.

When you connect your OnceHub account to your PayPal account, OnceHub retrieves the Currencies that are enabled in PayPal (See Figure 1). Learn more about PayPal currencies

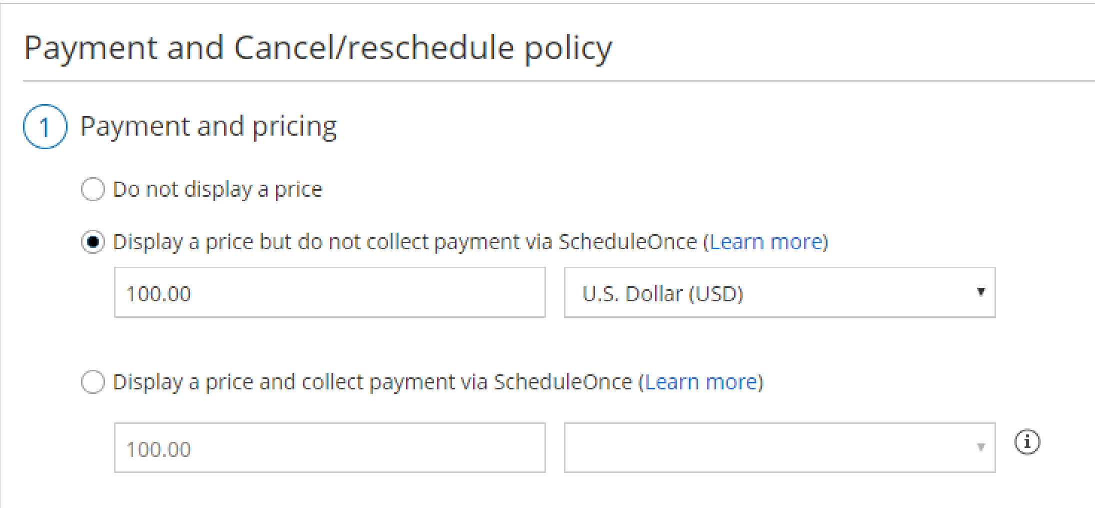


Figure 1: Payment settings in Event types

You can select the Currencies you want to make available in your OnceHub User app (See Figure 2). When checked, the currencies will appear in the relevant Event type **-> Payment and cancel/reschedule policy section** (See Figure 1). Learn more about Cancel/reschedule policy when payment is collected via OnceHub

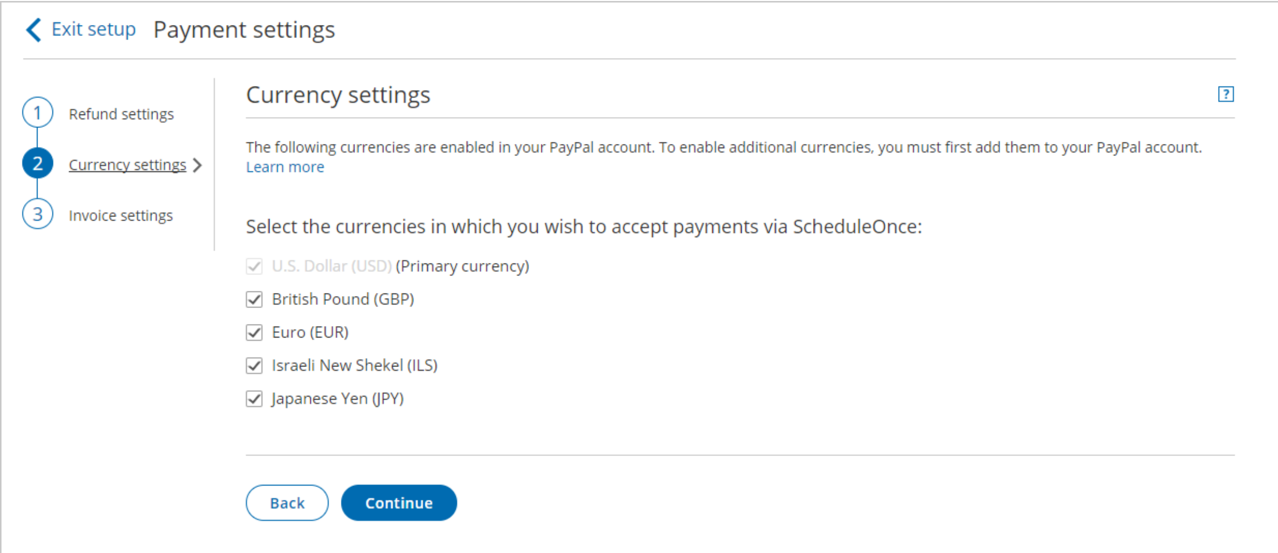


Figure 2: Currency tab

Frequently Asked Questions

What is the default currency for my Event types?

By default, the PayPal Primary currency is used as the default currency for your Event types. When you add a new Event type, the default currency will always be the PayPal Primary currency.

Can I change the default currency set for my Event types?

The PayPal primary currency cannot be changed from your OnceHub account. To change the default currency, you must change the PayPal primary currency directly from your PayPal account. Then simply refresh your Currency settings to reflect your changes. Learn more about changing the PayPal primary currency

What happens if I add a new currency in my PayPal account?

When you add a currency in your PayPal account, you will need to update the Currency settings in your OnceHub account to reflect the change. Once checked, the new currency will be available in your Event types.

What happens if I remove a currency in my PayPal account?

When you remove a currency in your PayPal account, you need to update the Currency settings in your OnceHub account to reflect your changes and ensure that your Event types are not set to that currency. Otherwise, your Event types will be set automatically to the PayPal Primary currency and you will not be able to accept payments or process refunds in that currency via OnceHub.

What happens if I remove a currency in my OnceHub account?

When you remove a currency in your OnceHub account, you need to ensure that your Event types are not set to that currency. Otherwise, your Event types will be set automatically to the PayPal Primary currency. Note that you will still accept payments or process refunds for scheduled bookings if your PayPal account can still accept payments in the removed currency.

Customizing invoice settings (collecting payments from Customers)

Last Modified on Oct 18, 2022

Note:

This article only applies if you use our PayPal integration to collect payments from your Customers. If you have any questions on how we bill you as a OnceHub Customer, go to the Account billing article.

Payment integration allows you to automate booking-related financial processes. OnceHub automatically sends an invoice to your Customers when a payment is made or a refund is processed via OnceHub.

In the Invoice settings, you are able to:

- **Turn on automatic invoicing for payments and refunds**: OnceHub allows you to automatically generate an invoice for all payments and refunds made via OnceHub and add it to default scheduling and rescheduling confirmation emails sent to the Customer.
- **Customize your invoice to fit your messaging and brand**: You can easily customize the invoice template with your own text messages and company logo.
- **Customize the invoice number to work in tandem with your financial environment**: You can customize the Invoice number by adding an Invoice number prefix, a Starting invoice number, and an Invoice number increment.

In this article, you will learn how to customize the Invoice settings.

Requirements

To customize the Invoice settings, you must be a OnceHub Administrator.

Customizing the Invoice settings

1. Hover over the lefthand menu and go to the Booking pages icon → open the lefthand sidebar → **Integrations → Payment**.
2. Click the **Customize payment settings** button.
3. In the **Payment settings** page, click the **Invoice settings** tab (Figure 1).

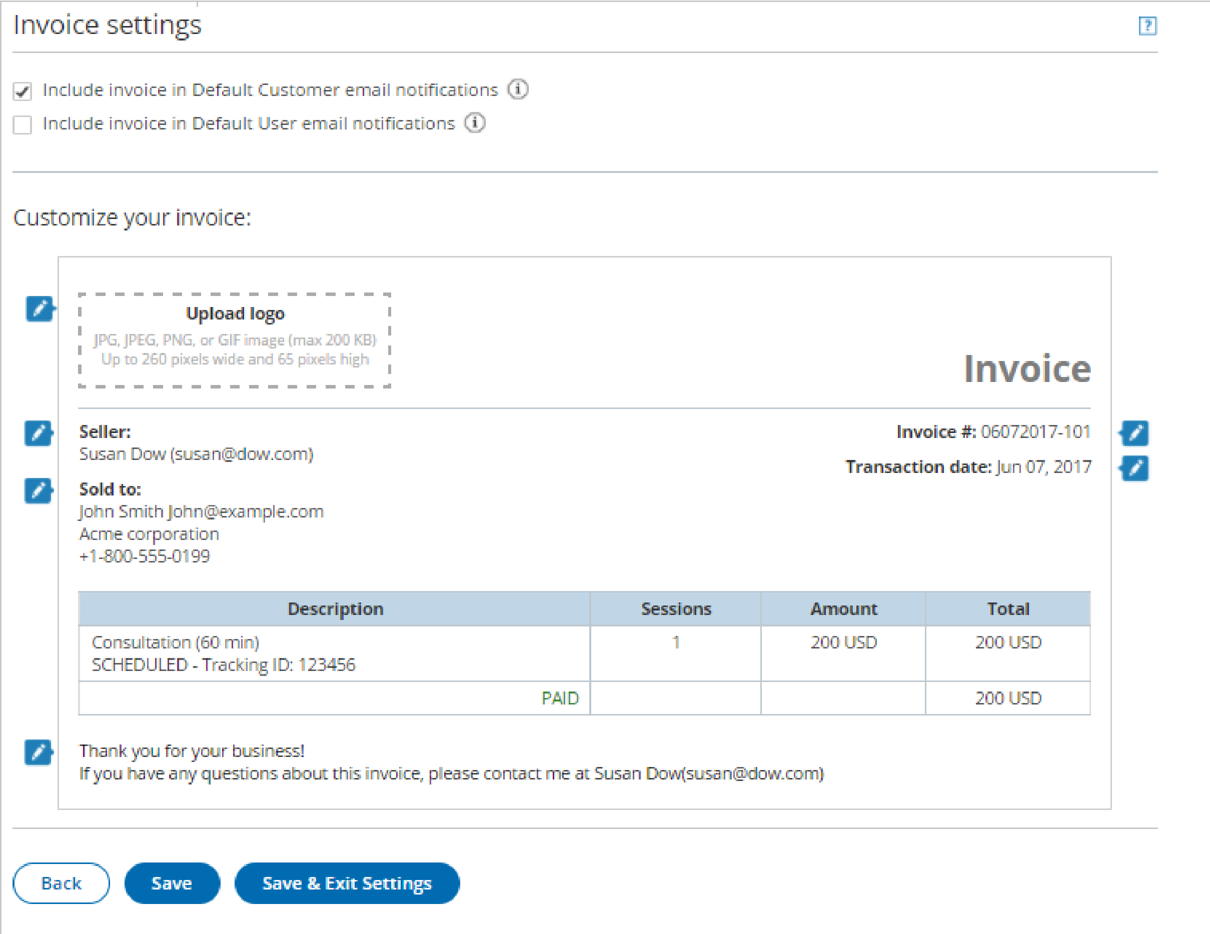


Figure 1: Invoice settings

4. In the **Invoice settings** area, check the relevant options:

   - **Include invoice in Default Customer email notifications**: By default, invoices for payment transactions will be automatically added to default scheduling and rescheduling confirmation emails sent to the Customer. Credit invoices for refund transactions will be automatically added to default cancellation emails sent to the Customer. When you uncheck this option, the invoice will be automatically removed from default email notifications. Learn more about notification scenarios
   - **Include invoice in Default User email notifications**: You can choose to add the invoice to User notifications. When checked, invoices for payment transactions will be automatically added to default scheduling and rescheduling confirmation emails sent to the User. Credit invoices for refund transactions will be automatically added to default cancellation emails sent to the User. Learn more about notification scenarios

5. In the **Customize your invoice** area, you can customize the look and feel of the invoice sent to Customers. Below is the list of fields that can be edited:

   - **Upload logo:** The image should be JPG, JPEG, PNG, or GIF image (max 200 KB) and up to 360 pixels wide and 60 pixels high.
   - **Seller** (max 100 characters): You can customize the Seller title and detailed information.
   - **Sold to** (max 50 characters): You can customize the title for the Customer information appearing on the invoice. The Customer information is dynamically added at the time of the booking and can include the Customer full name, email, company, and phone number.
   - **Thank you...** (max 150 characters): You can customize the footer displayed at the bottom of the invoice.

- **Transaction date** (max 50 characters): You can customize the title of the transaction date that will appear on the invoice.

6. To update the Invoice number, click the edit icon next to the Invoice number. The **Invoice numbering** pop-up appears (Figure 2).

- **Invoice prefix:** The Invoice prefix can be a date or a custom text. Custom text can be a maximum of ten characters: 0 to 9 and can only contain alphanumeric characters: 0-9 a-z A-Z. It does not in include special characters such as *space,\,',",/,&,<.>,=,[,].*
- **Separator**: You can add a separator between the Invoice number prefix and the Invoice number. The separator is by default a dash "-".
- **Starting invoice number**: The starting invoice number determines from which number you want OnceHub to start. It can be between 1 to 100,000.
- **Invoice increments**: You can set the increment in which invoice numbers will be generated. The invoice increment can be set between 1 and 10.

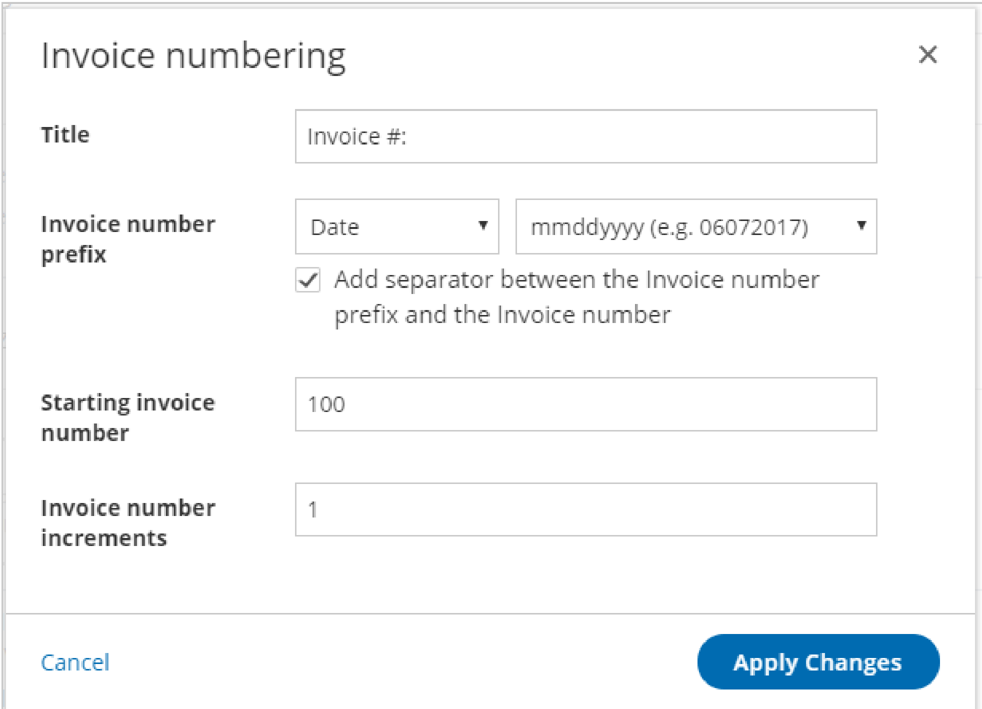


Figure 2: Invoice numbering

Manual refund via OnceHub (collecting payments from Customers)

Last Modified on Oct 18, 2022

Note:

This article only applies if you use our PayPal integration to collect payments from your Customers. If you have any questions on how we bill you as a OnceHub Customer, go to the Account billing article.

Our Payment integration feature fully handles all payments throughout the booking lifecycle, including manual issuing of refunds.

The ability to refund Customers manually via OnceHub enables you to:

- Handle cancellations and reschedule requests initiated by the User, rather than by the Customer.
- Deal with cancellations initiated by the Customer outside of OnceHub. For example, you might want to issue a refund when your Customer has cancelled a meeting via email.

You can issue manual refunds within OnceHub for any paid transaction directly from the Activity stream. Refunds issued via OnceHub are accessible in the Activity stream and in detailed Revenue reports.

Note:

In order to issue a refund via OnceHub, you must enable the manual processing of refunds via OnceHub and ensure that the User making the refund has the permission to refund via OnceHub. A OnceHub administrator can manage the User permissions for their own profile and other Users' in the OnceHub permissions section in the User profile.

In this article, you will learn **how to issue a manual refund via OnceHub**.

Requirements

To issue a refund via OnceHub, you must:

- Be the Owner or the Editor of the activity
- Have the permission to refund via OnceHub
- Enable the manual processing of refunds via OnceHub

Refunding via OnceHub

To issue a refund via OnceHub:

1. Click on the Transaction from your Activity stream. In the **Details** pane, click **Process a refund** (Figure 1).

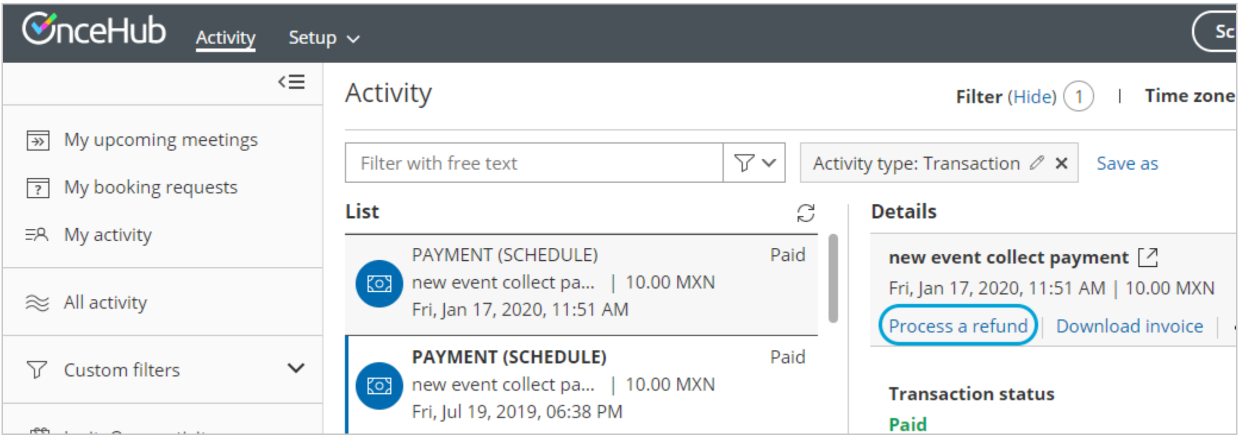


Figure 1: Issuing a manual refund

2. Enter the amount to refund and click **Refund**.

> **Note:**
>
> The User can also issue a refund when initiating a cancellation or requesting reschedule for any Event type. Learn more about cancelling or requesting reschedule for any Event type

Refunding manually via PayPal

Refunds issued via PayPal are also captured in OnceHub via the PayPal API and are accessible in the Activity stream and in detailed Revenue reports, giving you full visibility of your refunds activity. We recommend you refund through OnceHub rather than through PayPal, as with OnceHub a credit invoice is automatically issued and sent to your Customers in the default email notifications.

Automatic refunds via OnceHub (collecting payments from Customers)

Last Modified on Oct 18, 2022

> **Note:**
>
> This article only applies if you use our PayPal integration to collect payments from your Customers. If you have any questions on how we bill you as a OnceHub Customer, go to the Account billing article.

Our Payment integration handles all payments throughout the booking lifecycle, including the issue of automatic refunds. Subject to your Cancellation policy, Customers can be automatically refunded when they cancel a booking with you. Automatic refunds allow you to streamline your booking related financial processes and increase Customer satisfaction.

When refunds are issued automatically upon a cancellation initiated by a Customer, the following events occur:

- Customers are notified of the refund and a credit invoice is sent. Note that the credit invoice will not be sent if you refund your Customers via PayPal.
- The transaction is captured via the PayPal API and is accessible in the Activity stream and in detailed Revenue reports.

> **Note:**
>
> To automatically refund your Customers via OnceHub, you must enable the manual and automatic processing of refunds via OnceHub option for your OnceHub account.

Requirements

To configure automatic refunds via OnceHub, you will need to be a OnceHub Administrator and have an active connection to your PayPal account.

Configuring automatic refunds via OnceHub

To configure automatic refunds via OnceHub:

1. Connect OnceHub to your PayPal account
2. Enable the manual and automatic processing of refunds option for your OnceHub account
3. Set the Cancellation policy for your Event types
4. Test your setup by scheduling a booking and cancelling the booking on the Cancel/reschedule page. Learn more about testing the OnceHub connector for PayPal

Disconnecting OnceHub (collecting payments from Customers)

Last Modified on Nov 8, 2022

Note:

This article only applies if you use our PayPal integration to collect payments from your Customers. If you have any questions on how we bill you as a OnceHub Customer, go to the Account billing article.

When you disconnect from PayPal, you cannot accept payments or process refunds via OnceHub. The following events occur upon disconnection:

- Your PayPal account is disconnected from OnceHub.
- The automatic billing from OnceHub will be canceled.
- Your Event types are automatically set to Display a price but do not collect payment via OnceHub .

In this article, you will learn how to disconnect from PayPal.

Requirements

To disconnect from PayPal, you must be a OnceHub Administrator.

Disconnecting from PayPal

1. Hover over the lefthand menu and go to the Booking pages icon → Event types → your Event type → **Payment and cancel/reschedule policy** section.
2. Adjust your settings. You can either not display a price or display a price without collecting payment via OnceHub.
   Note If you do not adjust your payment settings before disconnecting your Paypal account, OnceHub will automatically set your Event types to display a price but do not collect payment via OnceHub . In this case, your cancellation and reschedule policy settings remain unchanged, but you will not be able to accept payments or issue refunds via OnceHub.
3. Hover over the lefthand menu and go to the Booking pages icon → open the lefthand sidebar → **Integrations** → **Payment**.
4. Click **Disconnect**. A pop-up appears informing you that disconnecting your PayPal account will:
   - Disable PayPal payment for your Event types
   - Cancel the automatic billing from OnceHub
5. Click **Yes**.

You are now disconnected and cannot accept payments or process refunds via OnceHub.

Conflicting settings (collecting payments from Customers)

Last Modified on Jul 21, 2019

Note:

This article only applies if you use our PayPal integration to collect payments from your Customers. If you have any questions on how we bill you as a OnceHub Customer, go to the Account billing article.

Payment integration is not compatible with the following configuration settings and vice versa:

- **Booking pages without Event types:** Payment integration only works with Event types. Booking pages that you have created without Event types do not include Payment settings. When Booking pages include Event types, you can define and customize the Payment and cancel/reschedule policy under the Event type.
- **Booking with approval:** Payment integration does not work with the Booking with approval mode. Payment integration can only work when your Event type is set to the Automatic booking mode.

OnceHub transaction fee (collecting payments from Customers)

Last Modified on Oct 18, 2022

Note:

This article only applies if you use our PayPal integration to collect payments from your Customers. If you have any questions on how we bill you as a OnceHub Customer, go to the Account billing article.

OnceHub has partnered with PayPal to offer payment integration through all phases of the booking lifecycle. OnceHub charges a 1% transaction fee for payments received via OnceHub, in addition to the fees charged by PayPal.

Why does OnceHub charge a transaction fee?

OnceHub provides a robust and feature-rich scheduling solution. Our license-based pricing allows us to offer our customers unlimited usage of our product and high-touch support. Payment integration allows you to increase sales, generate additional revenue streams, and reduce administrative overheads. To ensure that you do not bear any fixed costs upfront, and are only paying for actual usage rather than projections, we have implemented a transaction-based pricing model for payment integration. This allows you to enjoy the full benefits of our comprehensive and robust payment integration, with its cost directly aligned to the revenue you generate.

What are the fees charged by OnceHub?

Transaction fees are collected as follows:

- All payments received via OnceHub are subject to a 1% transaction fee, including those made with a free account.
- There are no transaction fees or credits for refunds made via OnceHub.
- For all currencies, the 1% transaction fee is rounded down.

How do you allow automatic billing?

When you connect your PayPal account to OnceHub, you will be prompted to allow automatic billing of a 1% transaction fee. You will be redirected to PayPal, where you will allow automatic billing via OnceHub. This is referred to in your PayPal account as a billing agreement. The transaction fee will be charged automatically with each payment received, and will be visible as an individual transaction in your connected PayPal account. Learn more about OnceHub payment terms of use

How will you invoice me for the transaction fee?

At the beginning of each month, you will receive a Transaction fee invoice from OnceHub summarizing all transaction fees paid during the previous month. The invoice is for your records only, and does not require additional payment, since the transactions were deducted automatically from your connected PayPal account with each payment received via OnceHub.

Custom integrations with the OnceHub API

Last Modified on Oct 18, 2022

Welcome to the OnceHub API

The OnceHub API is an advanced feature that can be used to build integrations with third party applications. Developers or technically savvy Users with scripting or programming knowledge can learn more about the API in our **Developer center**.

Note:

The **OnceHub Developer center** contains **technical documentation** and **reference** for our API. This includes features that allow access to data submitted or created during the booking process.

The **OnceHub Knowledge base** offers detailed information about other advanced features that let you pass external data through OnceHub, including:

- Prepopulated Booking forms
- Web form integration
- Source tracking
- Login integration
- Website integration

Our API gives you direct and reliable access to booking and conversation data from your account such as meeting time, customer details, location, and conversation status, using Webhook subscriptions. You can extract booking confirmation data from OnceHub at the time of scheduling with our client-side API. Using the API lets you achieve deeper integration of OnceHub with your application environment.

Webhooks

The OnceHub API lets you create Webhook subscriptions, which will automatically send you booking or conversation data whenever a lifecycle event occurs in your OnceHub account. For example, you can set up a Webhook to send customer details to your server whenever a new booking is made or a conversation is started.

Using Webhooks, you can develop custom integrations that use OnceHub booking data with your own applications, services, or data warehouse. **Learn more about OnceHub Webhooks**

Client-side API

OnceHub offers a collection of client-side API features that enable direct integration with third-party applications. Booking data can be sent via URL parameters or JavaScript to personalize the scheduling process, track booking activity, validate the effectiveness of bot campaigns, and enable high-quality customer data enrichment.

The client-side API lets you create custom confirmation pages using Booking form submission data and booking data generated at the time of scheduling. It also allows you to build better customer profiles by sending booking data from an embedded scheduling pane to your custom parent page. **Learn more about the client-side API**

Managing your account

Last Modified on Aug 29, 2024

Your account is where you can find the settings to control all of your key dealings with OnceHub, like adding users and user licenses, updating your security policies, managing your billing, and more. Read on to learn about the settings available for you in this section.

Account settings

Welcome to your OnceHub account!

To access your account, click on the gear icon in the top navigation menu.

Only Administrators have access to the following sections in the OnceHub **Account settings** section. You do not need an assigned product license to access this section. Learn more

Users

In the **Users** section, you can manage other users in your account. This includes:

- Adding new Users to your account
- Accessing and editing other User profiles
- Deleting Users from your account
- Assigning or unassigning User licenses

Teams

In the **Teams** section, you can create teams of OnceHub users. These teams can be assigned to field live calls, or be assigned to host scheduled meetings. You can assign managers to these teams who can handle some of their administrative load.

Alert center

The **alert center** allows you to create alerts which keep you updated on every step of the booking process. Read on for more information on how to set up an alert.

Contact fields

In the **Contact fields** section, review and add fields you can use with contacts.

CRM

In the **CRM** section, you can connect OnceHub to your CRM.

- Click here to find more about integrating with Salesforce
- Click here to find more about integrating with Infusionsoft

API & Webhooks

In the **API & Webhooks** section, you can generate and copy an API key to use with our API.

Billing

In the **Billing** section, you can:

- Review and add assigned licenses for Users
- View your SMS credits and SMS log
- Review your payment methods
- Add and adjust notifications your account admins receive about your OnceHub account
- View and download transactional invoices

Security and compliance

In the **Security and Compliance** sections, you can manage:

- Password policies - including settings for Password length, Password complexity, Password expiration, and Password history.
- Account lockout policies - you can enable or disable account lockout and set the number of unsuccessful login attempts allowed before account lockout occurs.
- Session policies - you can enable or disable session timeout and manage the session timeout period.
- Provide OnceHub with the contact information of your Data Protection Officer and your European Union representative.
- Describe your processing of personal data in OnceHub as required by the GDPR. Learn more about maintaining records of processing in your OnceHub account
- Provide an email contact for data breach notification. In the event of a data breach, we always notify you via the email addresses of your account administrator and Data Protection or Privacy Officer. If there is anyone else you want us to notify, you can enter up to five email addresses here.
- Manage your Email from your domain settings. These settings allow you to control the email address that communications to your customer are sent from.

Settings and permissions

In the **Settings and permissions** section, you can:

- Delete your account (more information in following section)
- Specify a Compliance BCC email - this will allow you to automatically forward a hidden copy of all outgoing customer email notifications to a designated email address.
- Enter your partner referral code
- Remove OnceHub branding on customer-facing pages
- Allow Member users to create and update chatbots, forms, and pages

> **Note:**
>
> Admins can update all chatbots and forms. Members can only update those an admin assigned to them

Chatbot and form privacy

In the **Chatbot and form privacy** section, you can define the privacy and cookie policies related to visitors who encounter your chatbots and forms.

Compliance BCC emails

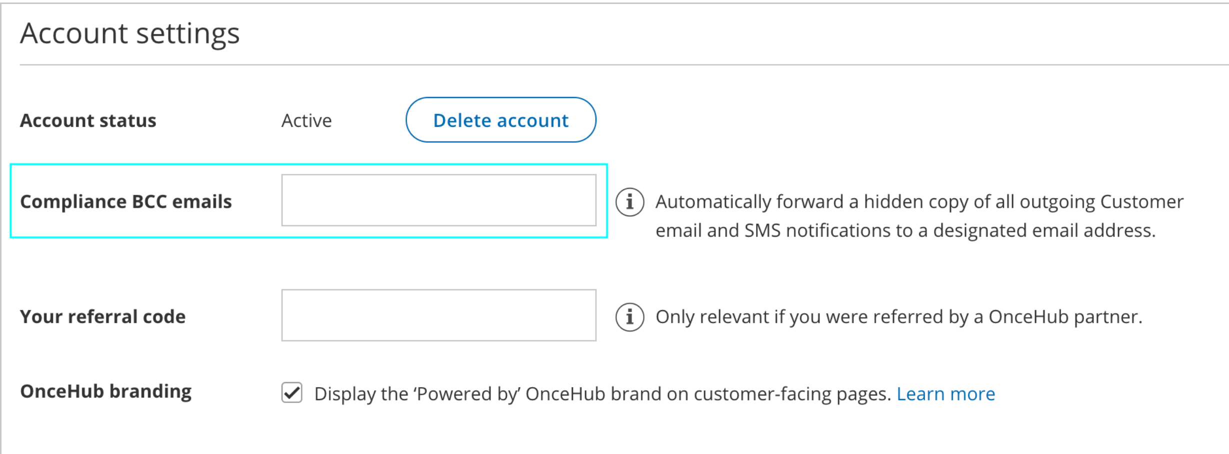
OnceHub gives you the ability to automatically forward a hidden copy of all outgoing Customer email and SMS notifications to a designated email address. This feature is especially important for organizations who are required to evaluate all sent messages for compliance purposes.

Setting up Compliance BCC email

In order to set up a Compliance BCC email, it is necessary for you to already have your own BCC email address set up and accepting emails.

To add a BCC email address to your OnceHub account:

1. Sign in to your OnceHub account.
2. In the top navigation menu, click the gear icon → **Settings** → **Compliance BCC emails**.
3. Enter the relevant email address in the Compliance BCC emails field (Figure 1).



4. Enter your BCC email address and click **Save**.

We recommend creating a test booking and sending a test email to yourself to ensure that the BCC address is accepting emails as expected.

Once set up, all customer notifications, whether email or SMS notifications, will be Bcc'd to your designated email address.

Creating and managing teams

You can group users together into a team, allowing you to easily assign multiple users to host meetings and so offering more availability to your customers. Based on rules which you set, meetings can be distributed among team members equitably, or favoring availability offered to customers.

You can assign a team manager to a team, who is able to act as similarly to an administrator for the members of their team.

For more specific details on what team managers can and can't do, see here.

To create a team:

1. Go to your account settings (the gear icon at the top right), then go to **Teams**.
2. If you have any existing teams in the account, you will see them here. To create a new team, click the **Add**

team button at the top right.

3. Name your team, and from the **Users** dropdown menu, select the team's members, then **Add** (Figure 1)
4. That's it! You can now assign a team to host meetings.

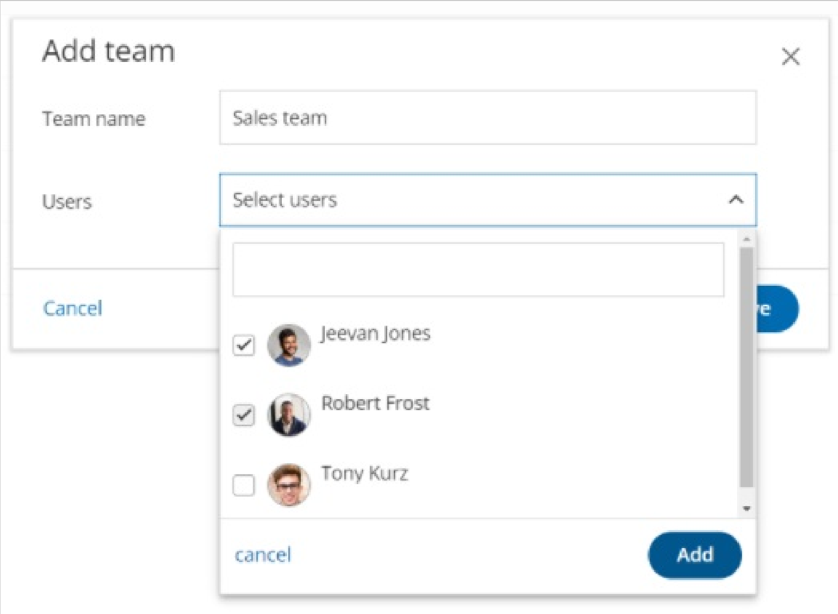


Figure 1: Creating a team and adding team members.

To edit a team:

1. Go to your account settings (the gear icon at the top right), then go to **Teams**.
2. In the lobby, click the three-dot menu for the team you want to edit, and click **View/Edit team**.
3. Here, you can rename the team, add new users to the team by selecting them from the drop-down menu, or remove users from the team by clicking the **X** next to their name.
4. Click **Save** when you're finished to save any changes you have made.

Using a team manager

The team manager plays a role somewhere in between an administrator and member: They have access to most functionalities in the account, with restricted access to sensitive areas like customer data. Once they are assigned a team, they can create scheduling pages on behalf of their team members, as well as edit aspects of their team members' profile and scheduling settings. Team managers can manage multiple teams, and teams can have multiple managers.

To assign a team manager to a team:

1. Click the **gear icon** in the top right corner and select **Users**
   - Here you can see all the users on your account, and their member type under the **Role** column.
2. Click the user whose status will be changed
3. Click the **three-dot menu** next to **Role** → **Edit role**
4. From the **Role** drop-down menu, select **Team manager**.
5. From the **Team/s** menu, click the checkbox next to the team/s you want this user to be the manager of.

6. Click **Apply** to finalize your settings.

That user is now able to manage the team/s they have been assigned to!

How can I use team managers?

Let's say you have three different sales teams in your organization, and you want each to be managed by a lead member. You also want your head of sales to oversee and administrate all of these teams. You can achieve this by:

- Assigning your head of sales as a team manager to all of these sales teams, by selecting all of the sales teams from the **Team/s** dropdown as described above.
- Assigning each lead member to be the team manager of their own team, by selecting just their team from the **Team/s** dropdown as described above.

The head of sales will now be able to manage all the members of all the teams, while the lead member will only be able to manage their own team.

Alert center

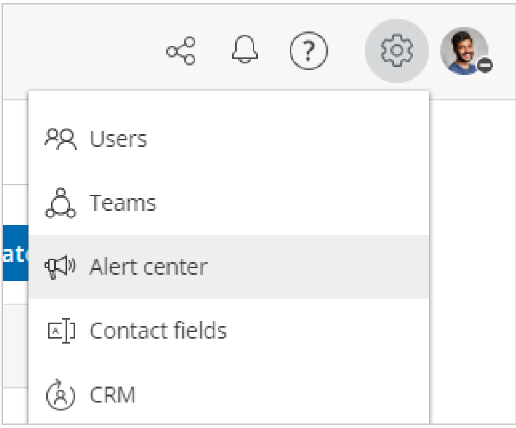
Note :

Only administrators are able to create alerts, but a member user can be added as a recipient of any global alert.

Learn more about the differences between administrators and member users.

Alerts are a feature which enable the administrator, and any users they add, to be CC'ed into notification emails about bookings made, canceled, or rescheduled with any users and/or scheduling tools in the account. The email will contain all the relevant information about the meeting.

The alerts builder can be found under account settings (the gear icon in the top right-hand corner).



The Alerts center

To create a new global alert:

1. Click the **Create new alert** button.
2. Select an **Event** which triggers the alert. These can be:
   - Booking received
   - Booking canceled

- Booking rescheduled

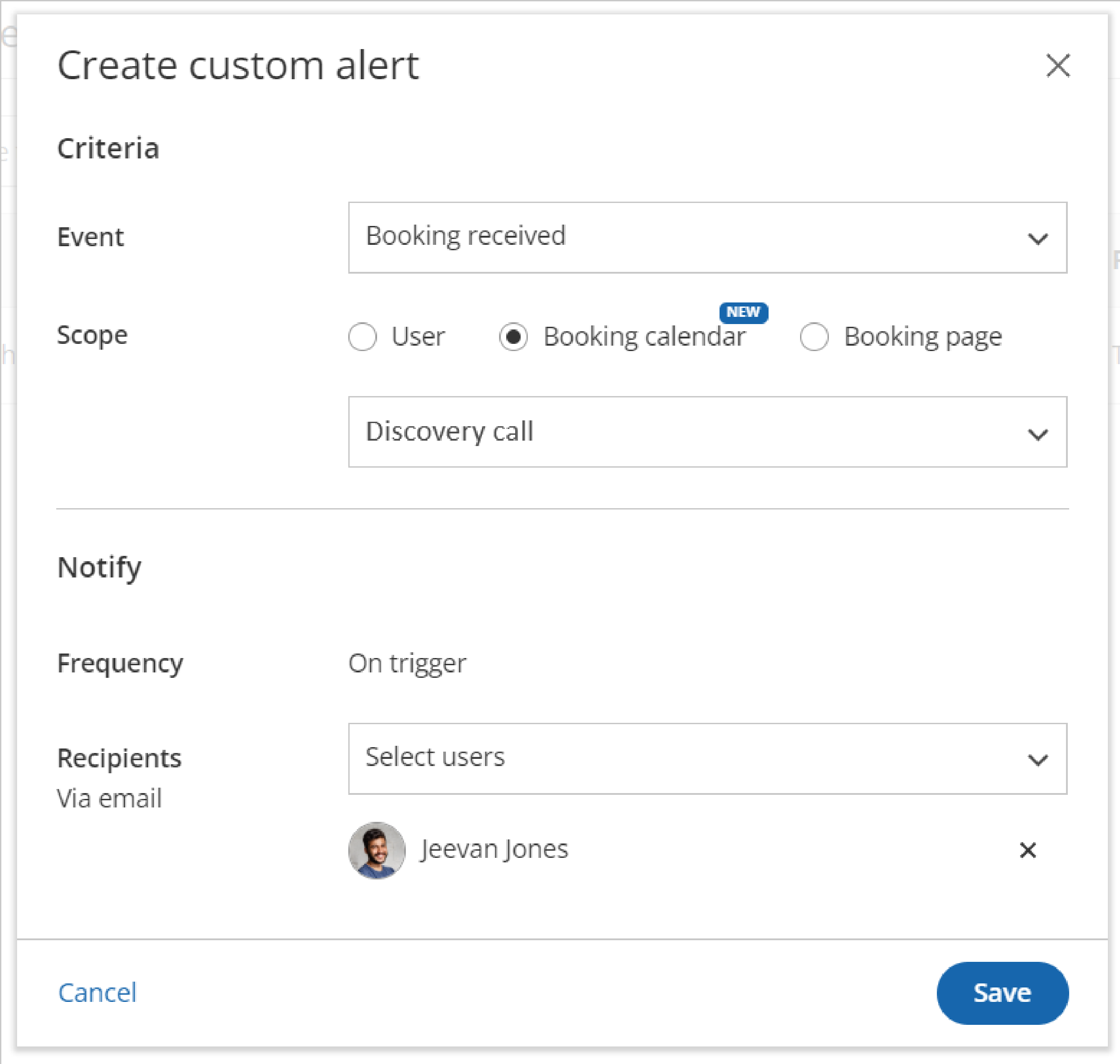
3. Select a **Scope**. This is the user, booking page, or booking calendar which will be the subject of the alert.
4. Depending on your choice above, click on the drop-down menu and select either a user, booking calendar, or booking page.
   - Whenever a booking is received, canceled, or rescheduled with that user, booking page or booking calendar, a notification will be triggered.
5. In the **Notify** section, select a **Recipient** from the drop-down menu. You can select multiple users as recipients. Alerts can be sent to any user in the account.

To edit, delete, or duplicate an existing global alert, click on the three-dot menu, and select the appropriate option.

Example of a custom alert:

In the example below, there is a configured custom alert. In this case, the alert will work as follows:

- When a booking is received/created in the booking calendar "Discovery call", the user "Jeevan Jones" will receive an email alert.



Creating a custom alert

Note:

If the user who has been scheduled with has turned off their email notifications for bookings received, canceled, or rescheduled, then users on the global alert will not receive any notifications either.

Notification center

The Notification center allows you to manage issues and warnings reported by OnceHub.

The Notification center can be accessed via the Notification icon in the top navigation bar (Figure 1). The number of pending notifications is indicated in red.

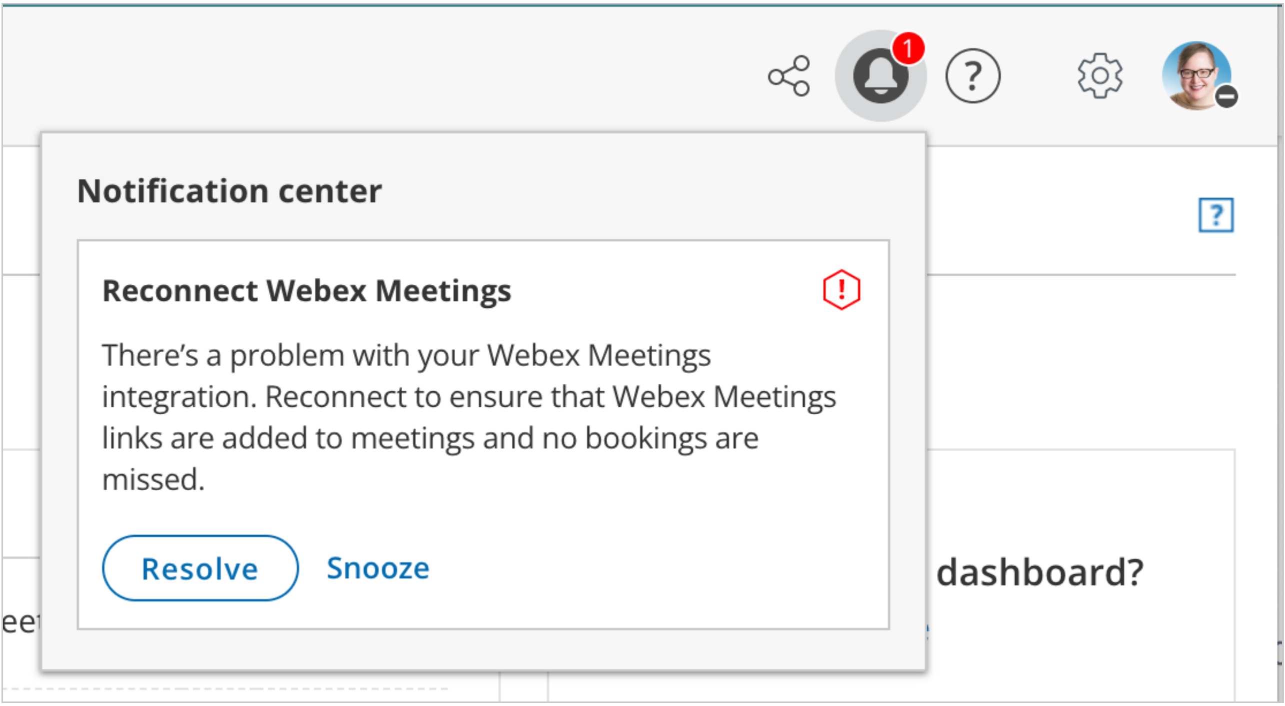


Figure 1: Notification center

In this article, you will learn about the different notification types that you may receive in the Notification center. You will also learn about resolving issues reported in the Notification center, and about snoozing or dismissing notifications.

Notification types

There are two types of notifications in the Notification center.

Issue

An issue is an urgent matter that should be addressed immediately. When an Issue is detected, the Notification center automatically opens to grab your attention (Figure 2).

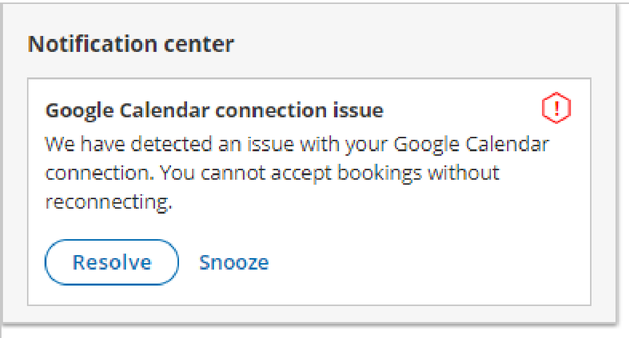


Figure 2: Issue example

Issue notifications include:

- Google Calendar connection error
- Microsoft 365 Calendar connection error
- Exchange/Outlook Calendar connection error
- iCloud Calendar connection error
- Salesforce API connection error

- Salesforce field validation error
- Infusionsoft connection error
- Zoom connection error
- GoToMeeting connection error
- Depleted SMS credit balance

Note:

When a connection error for a third-party integration occurs, you cannot accept bookings and should resolve the connection error as soon as possible. Such connection errors can occur when the integration is not set up correctly or when an API access token was revoked or has expired.

Warning

A warning is a non-urgent matter that you should be aware of (Figure 3).

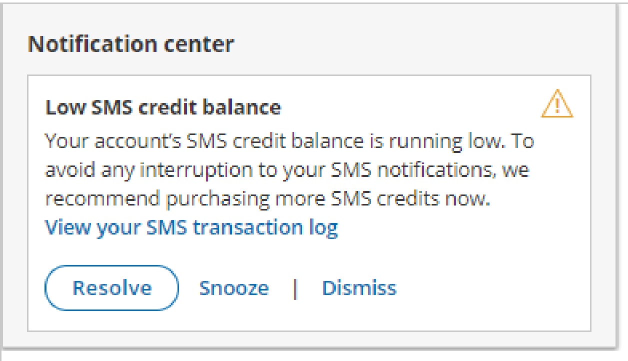


Figure 3: Warning example

Warning notifications include:

- GoToMeeting's access token is about to expire
- Low SMS credit balance

Resolving a notification

To resolve an item in the Notification center, click the **Resolve** button. This takes you to the relevant section in the platform where you can address the reported item.

Snoozing a notification

Click **Snooze** to hide the notification for a period of 24 hours.

Dismissing a notification

Notifications regarding your SMS credit balance have a **Dismiss** link. Clicking **Dismiss** hides the notification from the Notification center until the SMS credit balance is low or depleted again.

Signing up for a OnceHub account

To create a new OnceHub account:

1. Open the OnceHub sign up page and input your name, email address, and password.

2. Click **Sign up**.

Which email address can I sign up with?

You can create a OnceHub ID with any authentic email address and a password of your choice.

You can also create a OnceHub account using G Suite by installing the OnceHub app from G Suite Marketplace. Once installed, any User on your G Suite domain can create the first User. That User will become the first Administrator on the account, and all additional Users on the domain must be invited by the Administrator.

Can I change my email address after I sign up?

Yes, you can do so in your profile, accessed via the left navigation menu.

If you are using OnceHub with a G Suite ID, your email address is your G Suite ID and therefore can only be changed via your G Suite account.

Learn more about how your sign-in credentials are stored and protected by OnceHub

Accessing your account

> **Note:**
>
> Invited Users need to sign in for the first time by clicking the **Sign in to your account** button in the email invitation from the OnceHub Administrator of the account. Learn more about joining your organization's OnceHub Account

Sign in for Users with a OnceHub password

1. Open the OnceHub sign-in page.
2. Enter your Email ID and Password and click **Sign in** (Figure 1).Figure 1: Sign in to OnceHub
3. You will be authenticated using our secure authentication system, and redirected to the OnceHub Start page.

   > **Note:**
   >
   > If you have enabled two-factor authentication for your profile, your sign in process will include an additional step. Learn more about signing in with two-factor authentication in this article.

4. From the Activity stream, you can review your activities. You can also navigate to OnceHub, Chatbots, or your OnceHub Account settings by selecting an option from the top navigation menu.

Sign in for G Suite Users

If you have installed OnceHub using G Suite, you can access your account in two ways:

1. **Signing in from your G Suite account:** you can sign in from within your G Suite account via G Suite Apps using Google's secure single sign-on.
2. **Signing in from the OnceHub sign-in page:** you can also access your OnceHub account by clicking the **Sign in with G Suite** button at the bottom of the OnceHub sign-in page.

If you use G Suite and your OnceHub administrator did not install OnceHub through the G Suite Marketplace, it's possible they either want you to sign in with a OnceHub password (see above) or configured OnceHub so that you sign in through SSO (see below).

Sign in through SSO

If your Administrator has configured SSO for your account, you can sign into OnceHub by clicking the **Sign in with SSO** link at the bottom of the OnceHub sign-in page.

You will be redirected to your Identity Provider and, once authenticated, will be returned to your signed-in OnceHub account.

Learn more about configuring SSO for your account

If you're having difficulty signing in, please don't hesitate to contact us for more help.

Signing in with two-factor authentication

Two-factor authentication adds an extra layer of security to your account. When you enable two-factor authentication for your profile, you'll sign in to your account in two steps using your OnceHub account password and a unique verification code sent to your mobile phone. Learn more about how your sign-in credentials are stored and protected by OnceHub

Read on to learn about signing in to your account when two-factor authentication is enabled.

Signing in to your account

1. Sign in to your OnceHub account as usual, using your email ID and OnceHub password.
2. A unique verification code is sent to your mobile phone. If you do not receive a code, click **Resend code**.
3. On the **Verification** page (Figure 1), enter the verification code you just received and click **Sign in**.
4. If the verification code is correct, you will be signed in to your OnceHub Account.

Note:

Two-factor authentication has a built-in lockout policy to detect irregular activity. If any irregular sign-in activity is detected, your account will be locked. If your account is locked, contact your account Administrator to unlock it.

Deleting your account

You can delete your OnceHub Account at any time in the **Account settings** section of your OnceHub Account. Once your account is deleted, you will no longer be billed.

An alternative to deleting your account is to pause your subscription by removing all of your seats. You can remove seats at any time. When you remove seats, they are still available for use in the application until the end of your current billing cycle. This is because you've already paid for all of your seats in advance at the beginning of the current billing cycle. If you remove all of your seats, you will pause your subscription. This will limit your access to OnceHub functionalities. You can resume your subscription and access at any times by adding seats.

Read on to learn about the effects of deleting your account and how to delete your account.

What happens when I delete my OnceHub Account?

- When you delete your OnceHub Account, you are deleting all products linked to your account. Your data, meetings, and inbound pages will be permanently deleted for both OnceHub and Chatbots. Any credit cards used to make a purchase, as well as associated personal data, are permanently deleted.
- If there are multiple Users on the account, all Users will be permanently deleted when you delete your account. If you (or another User) sign in again with the same ID after the account is deleted, the system will treat you as a new User.
- Deleting your OnceHub Account will not affect the scheduled meetings in your calendar.
- Once your OnceHub Account is deleted, you will no longer be billed.

Once you delete your account, it cannot be recovered or re-activated. If you are not 100% sure that you want to delete your account, please contact us before you delete.

Important:

If you only want your Booking page or Master page to become unavailable, you can simply disable it and there is no need to delete your account. Learn how to disable your Booking page

Requirements

To access the **Account settings** page and delete your account, you must be a OnceHub Administrator.

Deleting your account

1. Sign in to your OnceHub Account.
2. In the top navigation menu, click on the gear icon → **Settings**.
3. Click **Delete account**.
4. In the **Delete account** pop-up (Figure 1), check the box marked **I want to delete my account. I understand this cannot be undone**.
   Figure 1: Delete account pop-up - feedback box
5. Click **Delete account** to delete your account.

Once your account has been deleted, you will be redirected to the OnceHub pricing page to see our latest plans and pricing should you wish to create a new account.

How to remove OnceHub branding on customer-facing elements

OnceHub is highly customizable, providing you with advanced branding tools that allow you to make our products a part of your organization's environment. If you have customized your page, email, and other customer-facing elements, we take a hands-off approach with our own branding and ensure yours is front and center.

Specific cases

In the following scenarios, we do not show our own branding:

- Using a custom theme: No branding the left pane of the relevant Booking page or Master page
- Using email from your domain: No branding on customer notification emails

- Using custom notification template: No branding on relevant customer notification emails

OnceHub branding added by default

If you have not customized these elements, we add a small bit of text by default, such as the text, "Powered by OnceHub," on a Booking page or customer notification email.

However, if you prefer not to display this text, it can be toggled off easily in your OnceHub account **Settings** section.

Simply uncheck the **OnceHub branding** box and this text will be removed from all customer-facing elements for future interactions.

> **Note:**
>
> To remove OnceHub branding, you may need to upgrade your plan.

Specific cases

In certain scenarios, branding is removed by default:

- Using a custom theme: Branding removed from the left pane of the relevant Booking page or Master page
- Using email from your domain: Branding removed on customer notification emails
- Using custom notification template: Branding removed on relevant customer notification emails

OnceHub for Google Workspace

OnceHub for Google Workspace is designed specifically for organizations using Google Workspace. Its special features are the single sign-on with the user's Google Workspace account, and the automatic connection to the user's Google Calendar.

OnceHub for Google Workspace is only available to organizations running Google Workspace, and can only be installed from Google Workspace Marketplace by the organization's Google Workspace Administrator.

Once installed, any user on the domain can create the first OnceHub account. That account will become the first administration account and all users will be added from that account only. Learn about adding Users

When the first Administration account is created, any User on the domain who tries to create an account without receiving an invitation from the Administration account, will be instructed to ask the Administrator to add them as a User.

Once Users are added and have signed up, they can simply access OnceHub from their Google universal navigation bar or with the Google login for OnceHub.

OnceHub for Google Workspace uses Google’s single sign-on, so it is as secure as your Google Workspace account. If you’re already logged into Google, no login is required to access the OnceHub platform.

To install OnceHub for Google Workspace, ask your Google Workspace Administrator to visit our OnceHub listing in the Google Workspace Marketplace.

Meeting addresses

Deleting your account

Last Modified on Aug 28, 2024

You can delete your OnceHub Account at any time in the **Account settings** section of your OnceHub Account. Once your account is deleted, you will no longer be billed.

In this article, you'll learn about the effects of deleting your account and how to delete your account.

What happens when I delete my OnceHub Account?

- When you delete your OnceHub account, you are deleting all products linked to your account. Your data, meetings, and inbound pages will be permanently deleted from OnceHub. Any credit cards used to make a purchase, as well as associated personal data, are permanently deleted.
- If there are multiple users on the account, all users will be permanently deleted when you delete your account. If you (or another user) sign in again with the same ID after the account is deleted, the system will treat you as a new user.
- Deleting your OnceHub account will not affect the scheduled meetings in your calendar.
- Once your OnceHub account is deleted, you will no longer be billed.

Once you delete your account, it cannot be recovered or re-activated. If you are not 100% sure that you want to delete your account, please contact us before you delete.

Important:

If you only want your booking page or master page to become unavailable, you can simply disable it and there is no need to delete your account. Learn how to disable your Booking page

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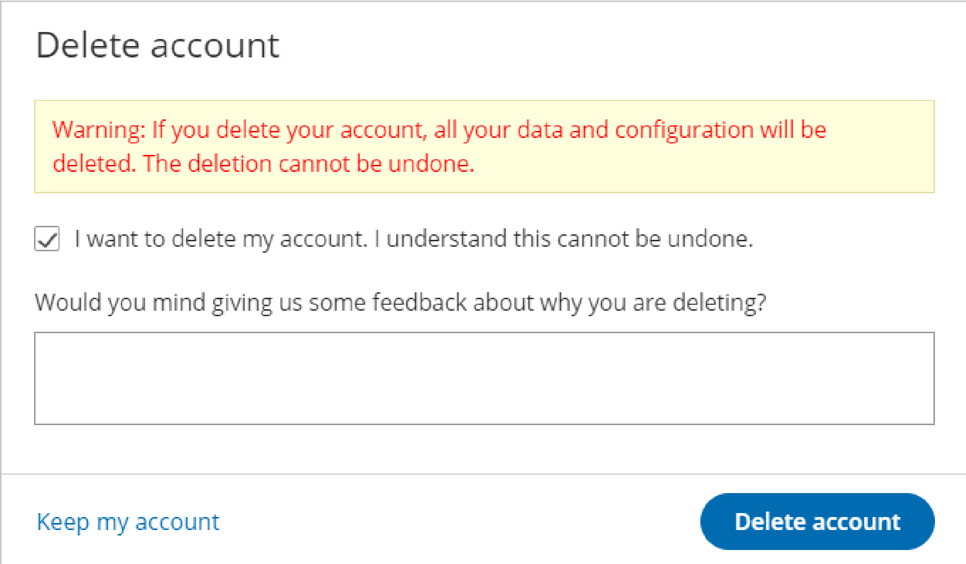

Figure 1: Delete account pop-up - feedback box

5. Click **Delete account** to delete your account.

Once your account has been deleted, you will be redirected to the OnceHub pricing page to see our latest plans and pricing should you wish to create a new account.

Analytics

Last Modified on Mar 17, 2024

Your analytics page is the hub where you can view all of the key metrics relating to your success with OnceHub. You can use it to view how many meetings have been created through your Booking pages, chatbots, and forms, how long it takes for you to engage with your leads, and much more.

Read on to learn about understanding and using the metrics displayed on the page.

Reviewing your analytics

OnceHub analytics are designed to help you accelerate your lead capture, qualification, and engagement.

Figure 1:Analytics

You don't need to do anything special to get started with your analytics. Just use booking pages, chatbots or forms to capture, qualify, and engage with leads, and the data will refresh every few minutes.

Lead engagement rate

Your lead engagement rate shows the number of leads engaged as a percentage of leads captured. (Lead engagements include live chat conversations, instant meetings, and scheduled meetings.)

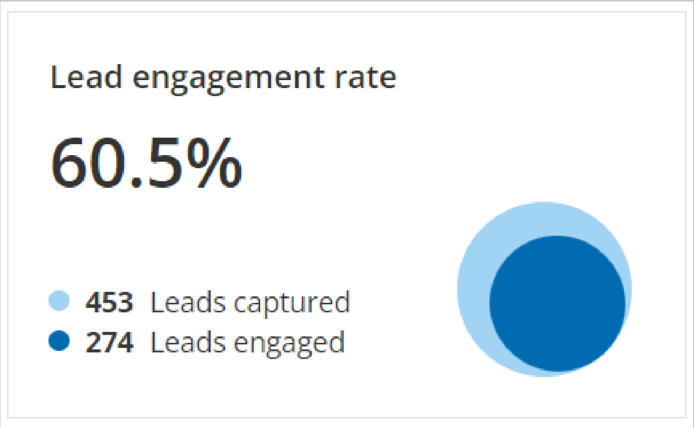

Figure 1: Lead engagement rate

For example:

- Your booking pages, chatbots, or forms captured 453 leads.
- You had 274 lead engagements using live chat conversations, instant meetings, or scheduled meetings.
- Your lead conversion rate was 274 ÷ 453 = 60.5%.

Learn more about accelerating your lead conversion rate.

Time to engagement

Your time to engagement metrics show the average time from initial lead capture to initial lead engagement.

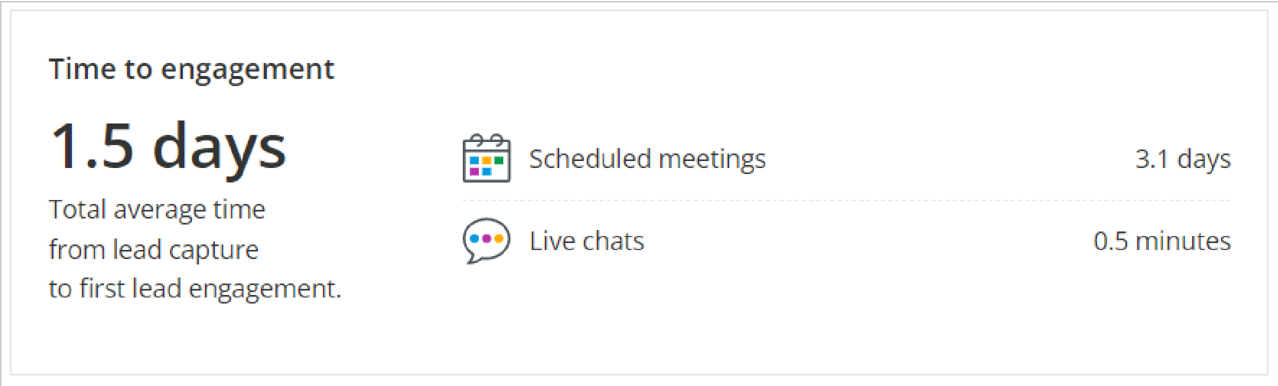

Figure 2: Time to engagement

For example, live chat conversations can happen within a few minutes of capturing a new lead, while scheduled meetings can take several days.

Learn more about accelerating your time to lead engagement.

Visitors seen

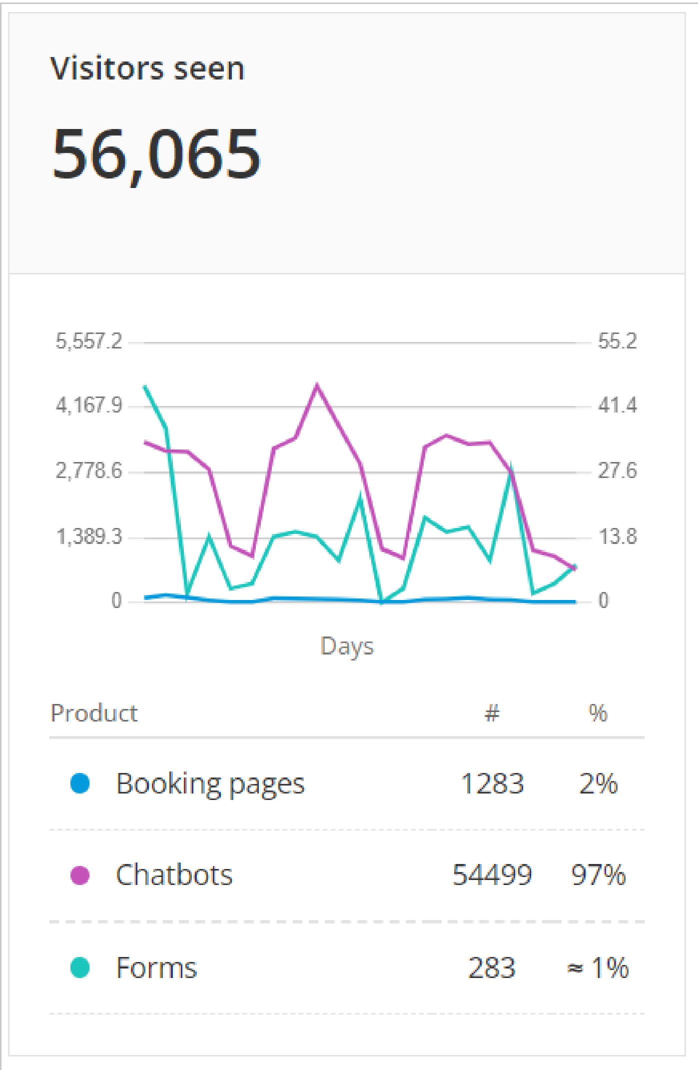

Figure 3: Visitors seen

Your visitors seen metric shows how many visitors were seen by your booking pages, chatbots, or forms.

- A visitor may have been seen by your booking pages, chatbots, or forms, but that doesn't mean they interacted with them.

New leads captured

Your new leads captured show how many new leads were captured by your booking pages, chatbots, or forms.

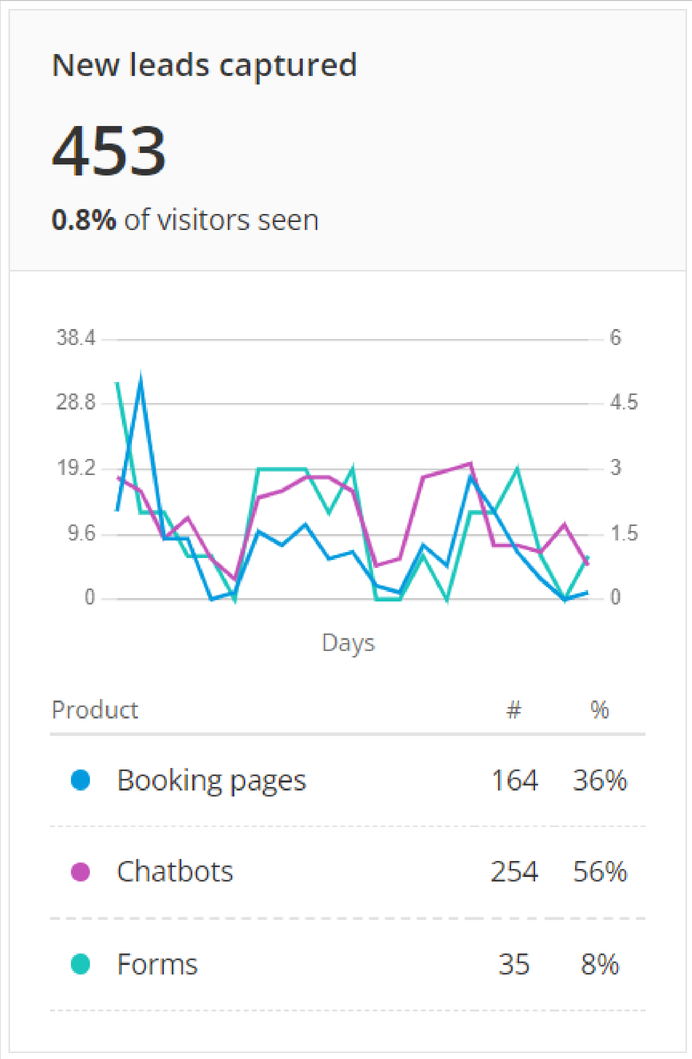

Figure 4: New leads captured

- A high lead capture rate indicates that you have good quality visitors coming to your website and that your booking pages, chatbots, or forms are well optimized.
- A low lead capture rate indicates that you have poor quality visitors coming to your website or that you need to optimize your booking pages, chatbots, or forms.

Learn more about accelerating your lead capture rate.

New leads engaged

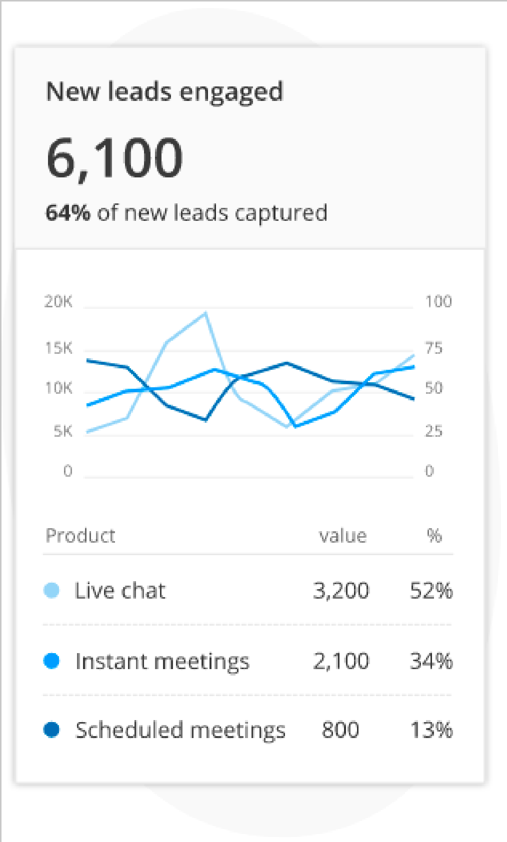

Figure 5: New leads engaged

Your new leads engaged shows the number of leads engaged and the number of live chat conversations, instant meetings, or scheduled meetings.

- A high lead engagement rate can indicate that you and your team have good availability for engaging with qualified leads.
- A low lead engagement rate can indicate that you and your team have poor time availability for engaging with qualified leads.

Learn more about accelerating your lead engagement rate.

Contact status

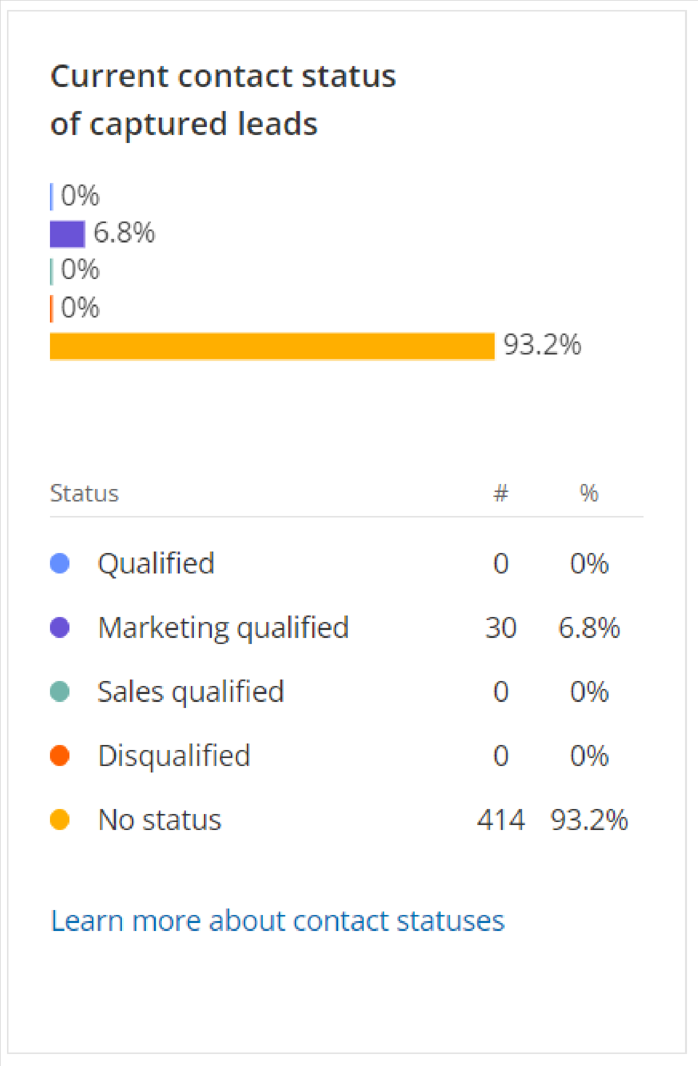

Figure 6: Current contact status

The current contact status of captured leads show the qualification status of leads who were captured during the selected date range.

- A high lead qualification rate indicates that you have good quality visitors coming to your website and that your qualification questions are well-optimized.
- A low lead qualification rate indicates that you have poor quality visitors coming to your website or that you need to optimize your qualification questions.

Filtering

OnceHub analytics are designed to help you accelerate your lead capture, qualification, and engagement. Adding filters will help you to focus on the performance of your forms, bots, campaigns, or teams.

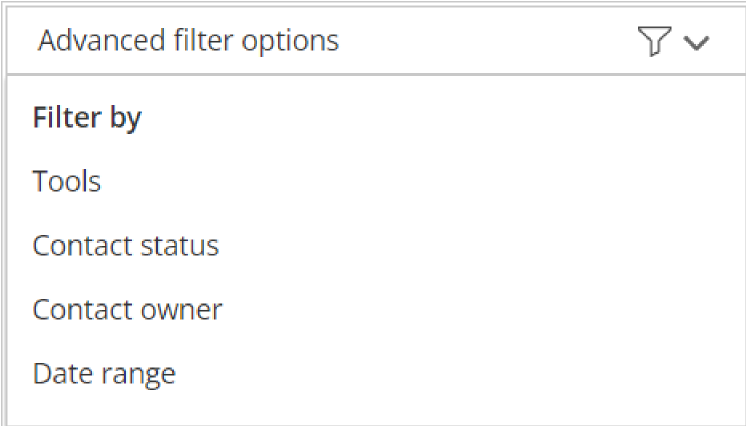

Figure 7: Advanced filter options

Filtering by tools

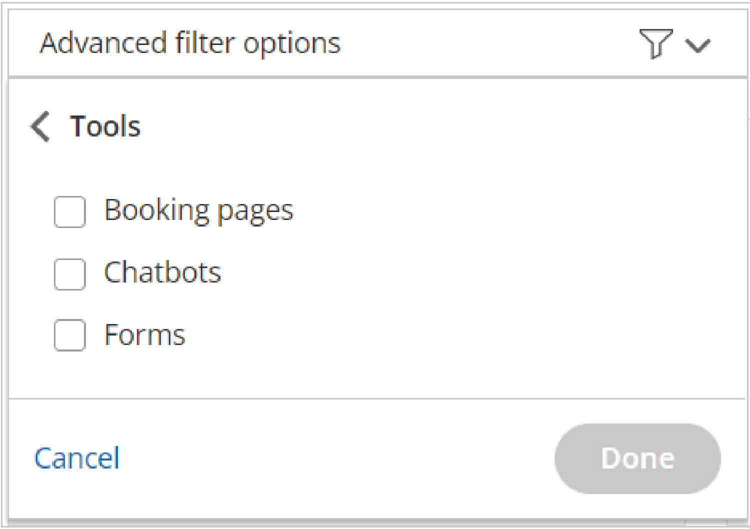

Figure 8: Filter by tools

The default view will show data for all OnceHub tools: booking pages, chatbots, and forms. Adding a tool filter allows you to focus on the performance of just one tool.

Filtering by contact status

All contacts in OnceHub are assigned one of the following qualification statuses:

- Qualified
- Marketing qualified
- Sales qualified
- Disqualified
- No status (default)

Adding a contact status filter allows you to focus on leads with a specific qualification status. For example, you might want to analyze marketing qualified leads and sales qualified leads separately.

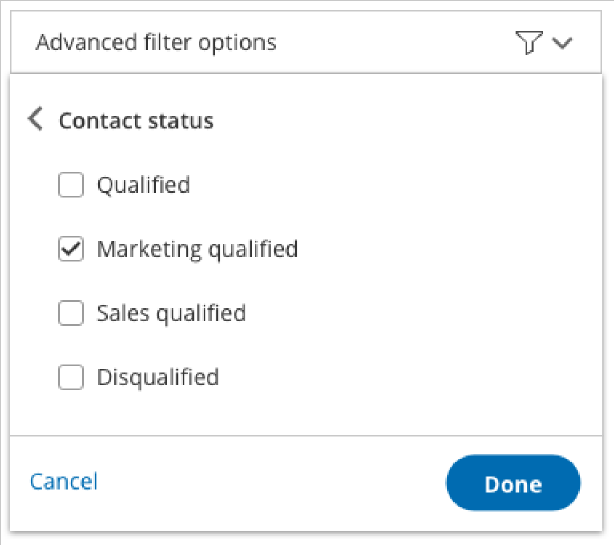

Figure 9: Filter by contact status

Bots and forms can automatically update the qualification status for contacts. You can also manually update the qualification status for a lead.

Filtering by contact owner

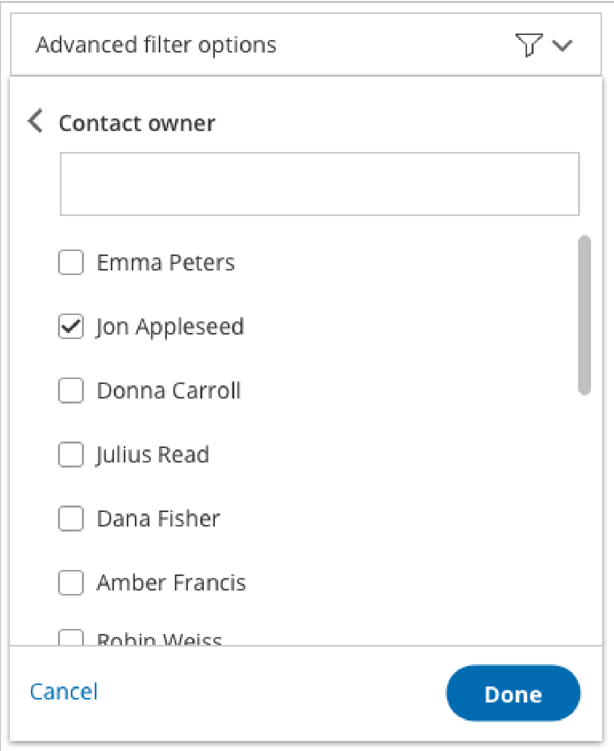

Figure 10: Filter by contact owner

Adding a contact owner filter allows you to track the progress of leads based on the contact owner. For example, you might want to track lead conversion or lead engagement performance for individuals or teams.

Filtering by date

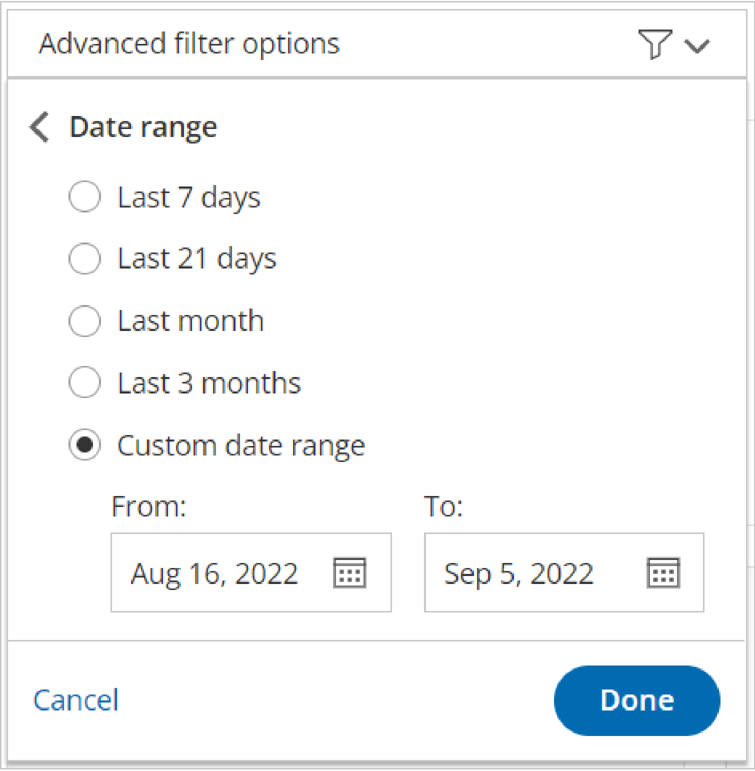

Figure 11: Filter by date

The default view will show data for the last 3 weeks. However, it's easy to add a date filter if you want to see data for a longer or shorter period of time.

Best practices

To make sure that you're getting valuable insights, here are some best practices to consider.

Schedule a regular time to review your analytics

If you really want to get the most from your analytics, you need to schedule a regular time each week to review it for 30 minutes or more.

Checking analytics quickly every day is a great idea but sometimes you need to take a wider view to see how metrics are trending from week to week, or even month to month.

Schedule a weekly recurring meeting in your calendar and invite some colleagues to join you. It's a great way to brainstorm ideas for improving your lead metrics.

Use filters to understand your analytics better

Adding filters is quick, easy, and very revealing. You can soon find out what's working well and what could be improved. You can use filters to measure the performance of individual chatbots, forms, and teams.

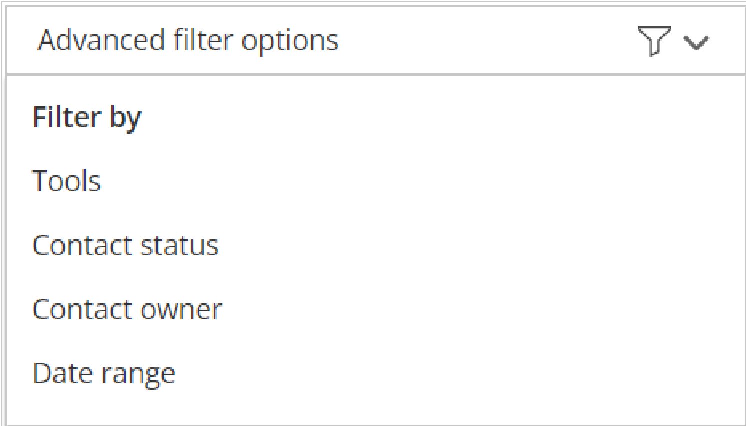

Figure 12: Filter your analytics

Use our guides to understand the metrics better

It's easy to get a little bit overwhelmed with a page full of metrics, so we've created guides to help you really understand each one:

- Accelerate your lead conversion rate
- Accelerate your time to lead engagement
- Accelerate your lead capture rate
- Accelerate your lead qualification rate
- Accelerate your lead engagement rate

Each guide also includes ideas for optimizing your booking forms, chatbots, and forms.

Experiment with different forms or bots for your visitors

Focus on one (or maybe two) metrics that you want to improve. If you try to improve everything at once, it's difficult sometimes to see what's actually working or not.

Review the pages on your website that are relevant for your chosen metrics. Can the messaging or content on the page be improved? Can a form or bot be added with qualification questions and engagement options?

If you're looking for ideas and inspiration for Chatbots, try this guide:

- Use Chatbots to capture, qualify, and engage with leads

Frequently asked questions

How do my analytics calculate time to engagement?

Your analytics calculate time to engagement as follows:

Live chat: The time from initial lead capture to the start of a live chat conversation.

Scheduled meeting: The time from initial lead capture to the start time for a scheduled meeting.

Note that the time to engagement for a scheduled meeting is based on when the meeting is due to happen, rather than when it was confirmed. It does not include scheduled meetings that have been canceled or marked as no-shows.

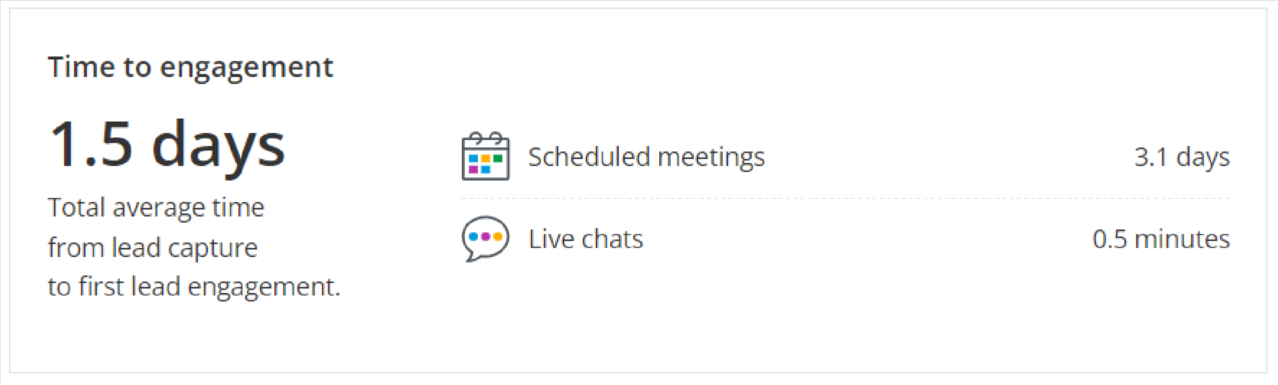

Figure 13: Time to engagement

How do my analytics calculate visitors seen?

Your analytics calculate visitors seen as follows:

Booking pages: The total number of visitors to pages that included a standalone, pop-up, or embedded booking page.

Chatbots: The total number of visitors to pages that included a standalone, pop-up, or targeted bot.

Forms: The total number of visitors to pages that included a standalone, pop-up, or embedded form.

Note that a visitor may have been seen by your booking pages, chatbots, or forms but that doesn't mean they interacted with them.

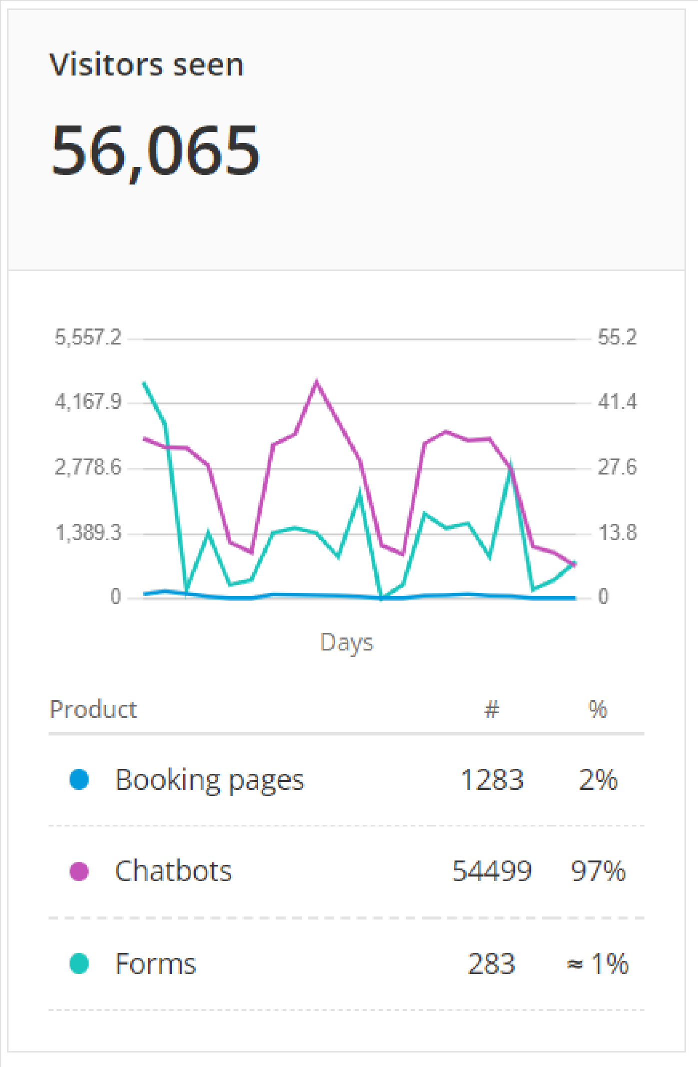

Figure 14: Visitors seen

How do my analytics calculate new leads captured?

Your analytics calculate new leads captured as follows:

Booking pages: The total number of new leads who scheduled a meeting through a booking page.

Chatbots: The total number of new leads who entered their email or phone number in a bot.

Forms: The total number of new leads who entered their email or phone number in a form.

Note that new leads captured will not include leads who have previously entered their email or phone number in a booking page, chatbot or form.

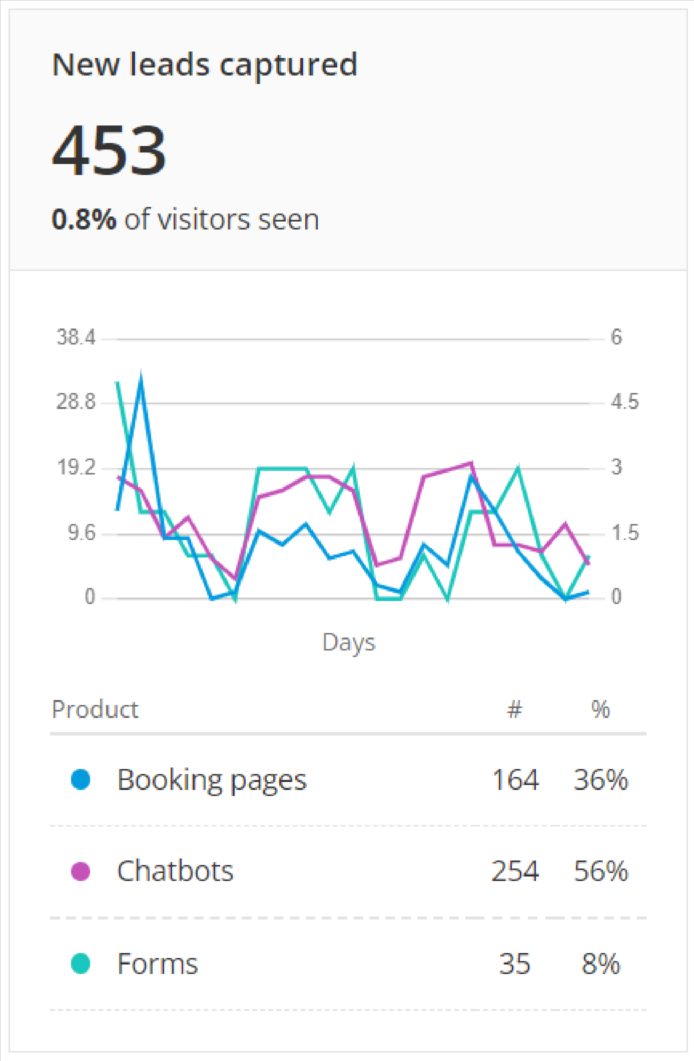

Figure 15: New leads captured

How do I update the qualification status of my contacts?

All contacts in OnceHub are assigned one of the following qualification statuses:

- Qualified
- Marketing qualified
- Sales qualified
- Disqualified
- No status (default)

Automatically updating the qualification status for a contact

Chatbots and forms can automatically update the qualification status by using the contact status action. For example, when a visitor has answered the qualification questions, you can decide whether their status should be updated to qualified or disqualified.

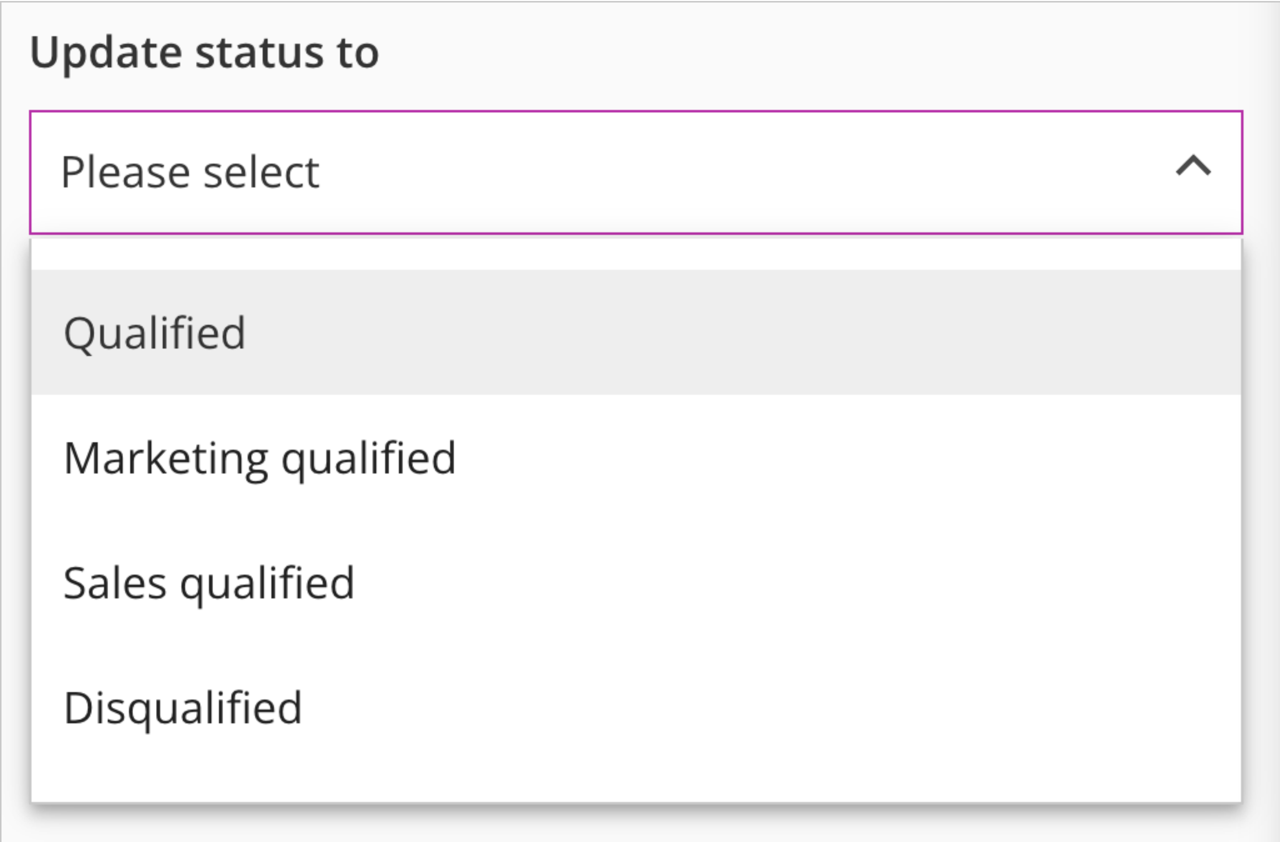

Figure 16: Contact status

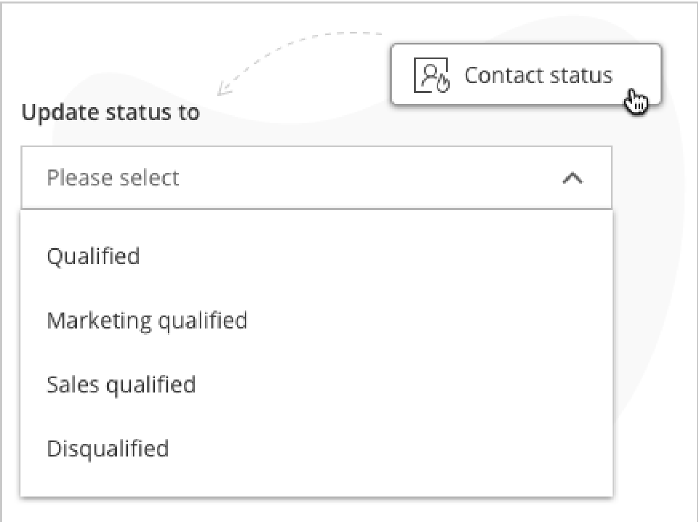

Figure 17: Update contact status

Booking pages do not include qualification questions so they cannot update the qualification status for a contact.

Manually updating the qualification status for a contact

You can manually update the qualification status for a contact in your activity screen. For example, you might change the qualification status of a contact after conducting an initial discovery call or live chat conversation.

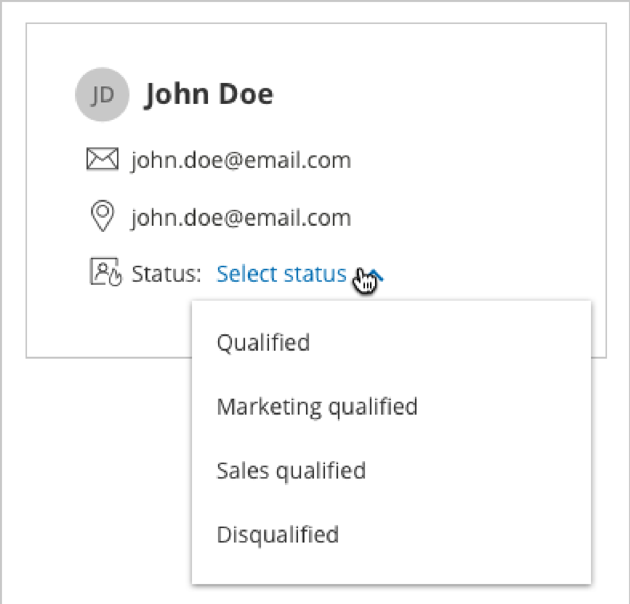

Figure 18: Select contact status

Booking analytics

Last Modified on Sep 12, 2024

Overview

The Booking analytics page allows you to view all bookings associated with your account, providing a clear and organized display of your booking data. With various filtering and viewing options, you can easily view and analyze trends. Whether you're looking to track recent activity or historical data, this page offers the flexibility and control you need to stay on top of your booking analytics.

Restrictions based on user role:

Administrators: OnceHub administrators can see all the bookings in the account with no restrictions

Team managers: Team managers can see their own bookings and those owned by team members that they manage, but can't see bookings outside of that.

Member users: Members can see only their own bookings. Certain steps, such as filtering by booking owner, are not available to them.

Key Features

1. View Bookings by Creation date

You can view bookings based on their creation date.

How to use:

- In the View by section, choose Creation date.
- From the Time range drop-down menu, set your preferred date range to view bookings created within that time frame. You can create a custom date range under the Specific dates option.
- Click Done once you have made your selection.

2. View Bookings by Meeting date

You can also view bookings based on the date they are scheduled to occur.

How to use:

- In the View by section, choose Meeting date.
- From the Time range drop-down menu, set your preferred date range to view bookings scheduled within that time frame. Click Done once you have made your selection.
  - Note that you can view past meetings, as well as upcoming meetings, or create a custom date range under the Specific dates option.

3. Filtering your results

The Booking analytics page also offers a wide range of filtering options to help you make a deeper analysis of your bookings . You can filter results by booking status (e.g., completed, canceled, or rescheduled), by the scheduling tools, and meeting host. You can also enter in UTM parameters and filter results by them.

These filters allow you to refine your data view to focus on the exact information you need, helping you understand the performance of a specific event type, tracking bookings from different booking calendars, or analyzing the schedules of individual meeting hosts.

Adding filters:

- Click on the Filter drop-down menu below the View by section.
- Select the category you want to filter by, then select the specific filter you want to add. Click Done to add the filter.
- The added filter will appear alongside the drop-down menu.
  - Click the pencil icon to edit it, or the X icon to remove it.
- You can add as many filters as you need to refine your analytics results.

Set the chart time frame

Once you've set the creation or meeting date, the results will be displayed in a chart. At the top right of the chart, you can select the time frame you want your data to be displayed in: Quarterly, Monthly, Weekly, or Daily.

4. Viewing and saving your results

Once you have adjusted the View by dates, set a time range, and added filters, all of the relevant data will be displayed in a chart. At the top right of the chart, you can select the time frame you want your data to be displayed in: Quarterly, Monthly, Weekly, or Daily.

If you want to save the current filter configuration, you can bookmark it in your browser. The booking analytics page will apply the same configuration when revisited from this bookmark.

When you hover over sections of the chart, a tooltip will appear, providing specific insights into that column of data. When you click View inside the tooltip, you will be taken to the activity stream, where the specific bookings included in the column of data will be displayed. Here, you can see more specifics about the bookings and manage them.

Practical use cases

1. Monitor recent booking activity

If you're interested in monitoring your booking trends, use the "Last 7 days" or "Last month" time range. This is particularly helpful if you've been running a promotion or marketing campaign and want to track its impact on bookings.

2. Identify seasonal trends

Use the quarterly view to look for patterns and trends in your bookings over time. This can help you understand seasonality in your business, allowing you to plan resources, staffing, or marketing efforts accordingly.

Frequently Asked Questions (FAQ)

Q: Can I see canceled or rescheduled bookings in the analytics?

A: Yes, the Booking analytics page allows you to filter by booking status, including completed, canceled, no-show, or rescheduled bookings. (Note that rescheduled bookings will only retain that status from the time that they are rescheduled until they are completed, at which point the status will change). This helps you get a full picture of your booking activity, even for appointments that didn't go as planned.

Q: How far back can I view my booking history?

A: You can view your entire booking history from the moment you started using our platform. Simply adjust the date range to include the desired timeframe.

The Activity stream: Viewing activities

Last Modified on Nov 28, 2024

The Activity stream is the central hub where you can manage all of your chat, booking, and payment activities. The Activity stream provides advanced filtering options to give you quick access to the information you require.

You do not need an assigned product license to access this section.

Introduction to the Activity stream

When you view a specific activity, you'll be able to view related activities, such as payments, rescheduled bookings, and cancellations. You can also perform actions such as refunding a payment or requesting to reschedule. You will have full insight into your organization's bookings and be able to manage all activities easily in one place.

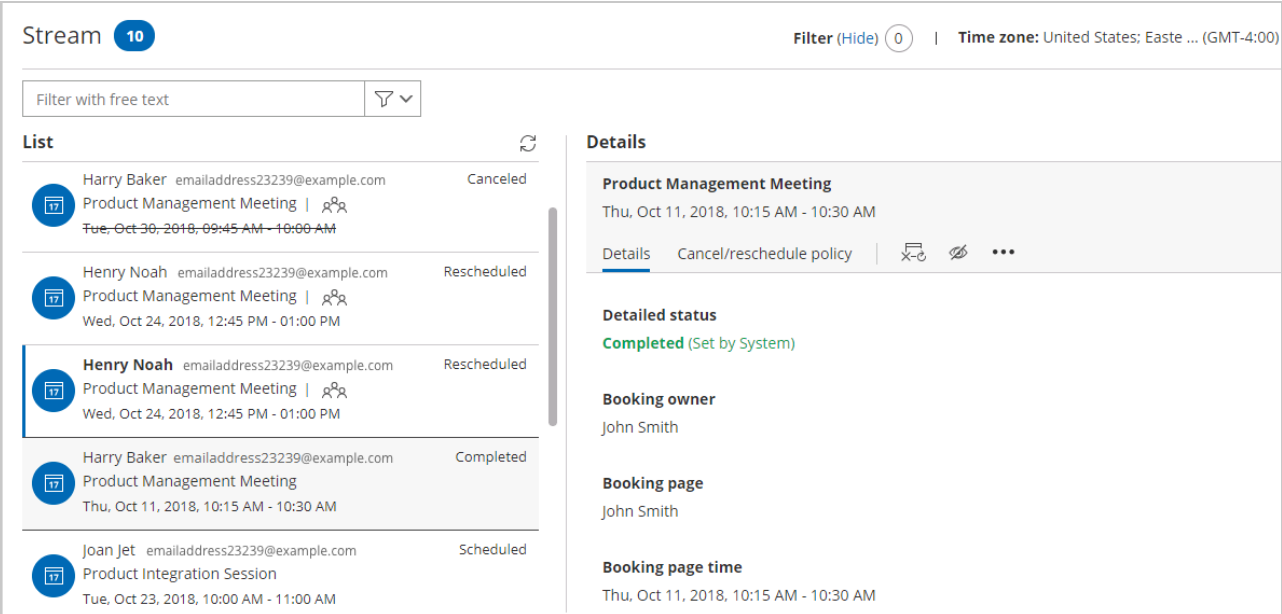

Figure 1: The Activity stream

Activity stream features

By default, the Activity stream shows your upcoming activities. The list of activities is organized based on your profile's time zone. You can adjust the filter to view all activities or search by another method.

The Activity stream lists all the activities that you have access to. You'll see all the Bookings for which you are the Booking owner, reassigned Booking owner, Editor, or Viewer. Learn more about Booking page access permissions

The Details pane of each activity allows you to access additional information about the activity, such as activity status, Session package status, and Payment transaction status. You can also perform specific actions, such as Cancel/request reschedule.

Filter options in the Activity stream

To find information in your Activity stream, you have four main options: Default filters, the Free text filter, Advanced filter options, and Custom filters.

Default filters

OnceHub provides Default filters for **My upcoming meetings**, **My booking requests**, **My activity**, and **All activity**. These filters can be found in the left sidebar of the **Activity** page (Figure 2).

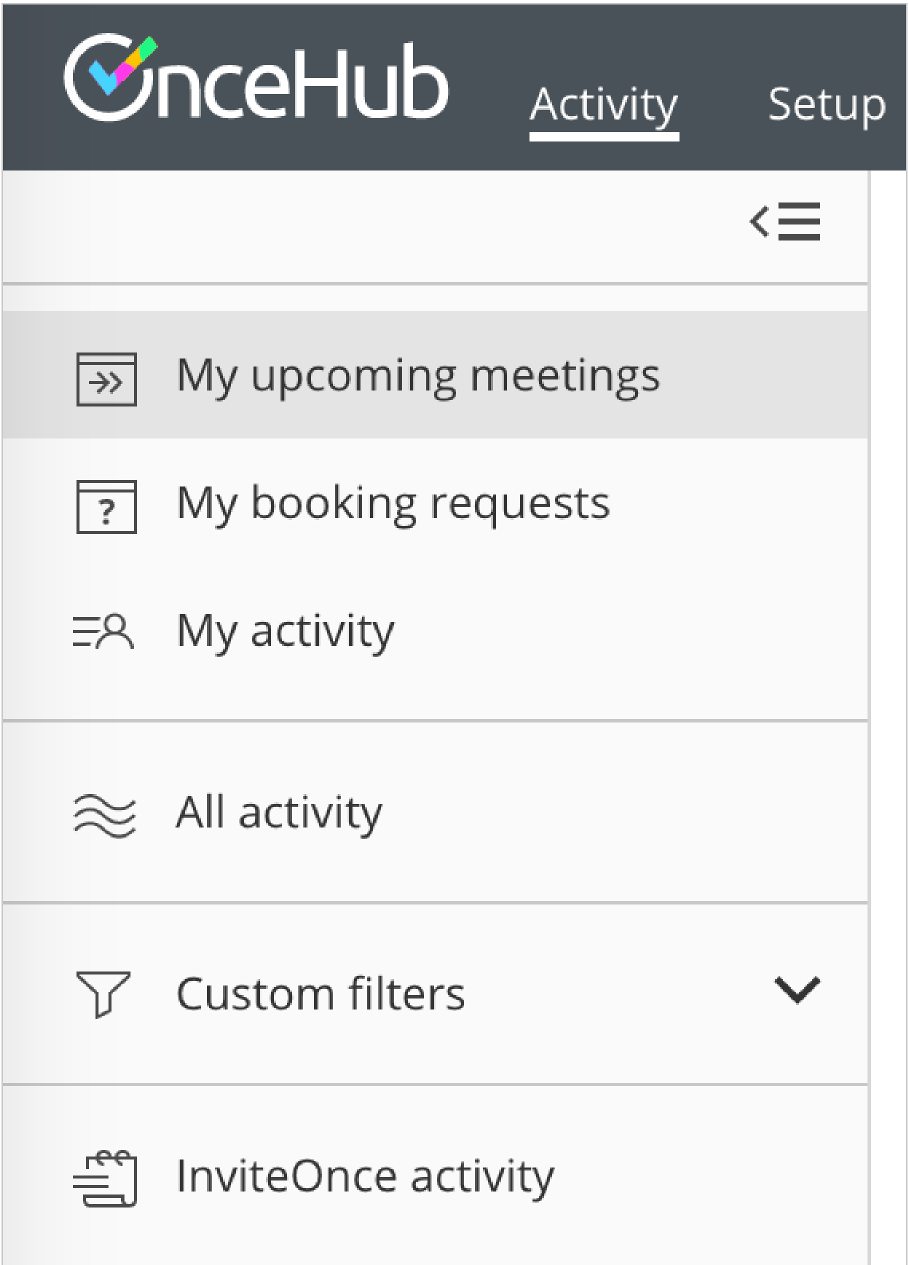

Figure 2: Default filters in the left sidebar

The Free text filter

The Free text filter allows you to find activities by typing in any information included in the activity details (Figure 3). For example, you could search by a Customer's name, a Customer's email address, or an Activity ID.

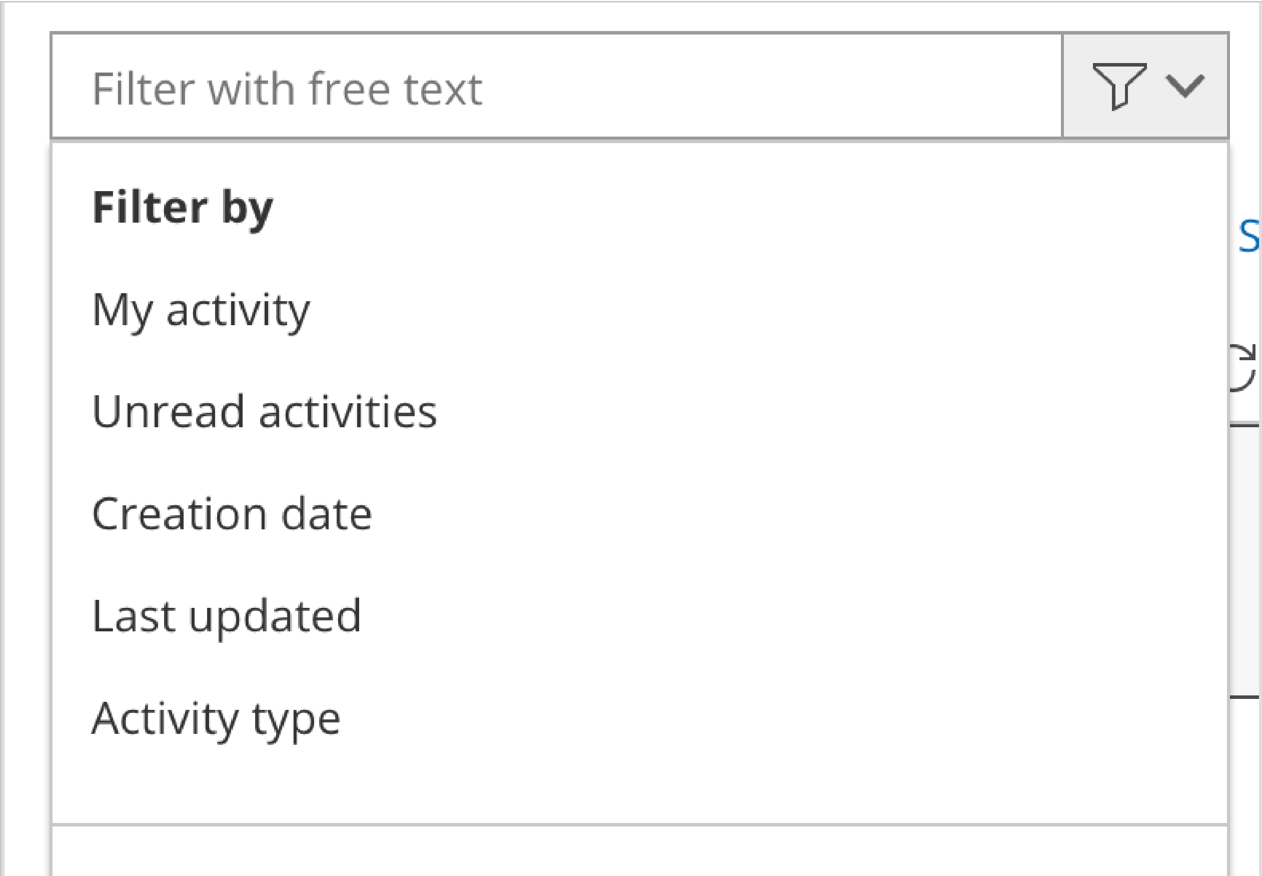

Figure 3: The Free text filter

Advanced filter options

Advanced filter options allow you to filter according to specific parameters (Figure 4). The list of parameters appears when you click the drop-down arrow next to the Free text filter box.

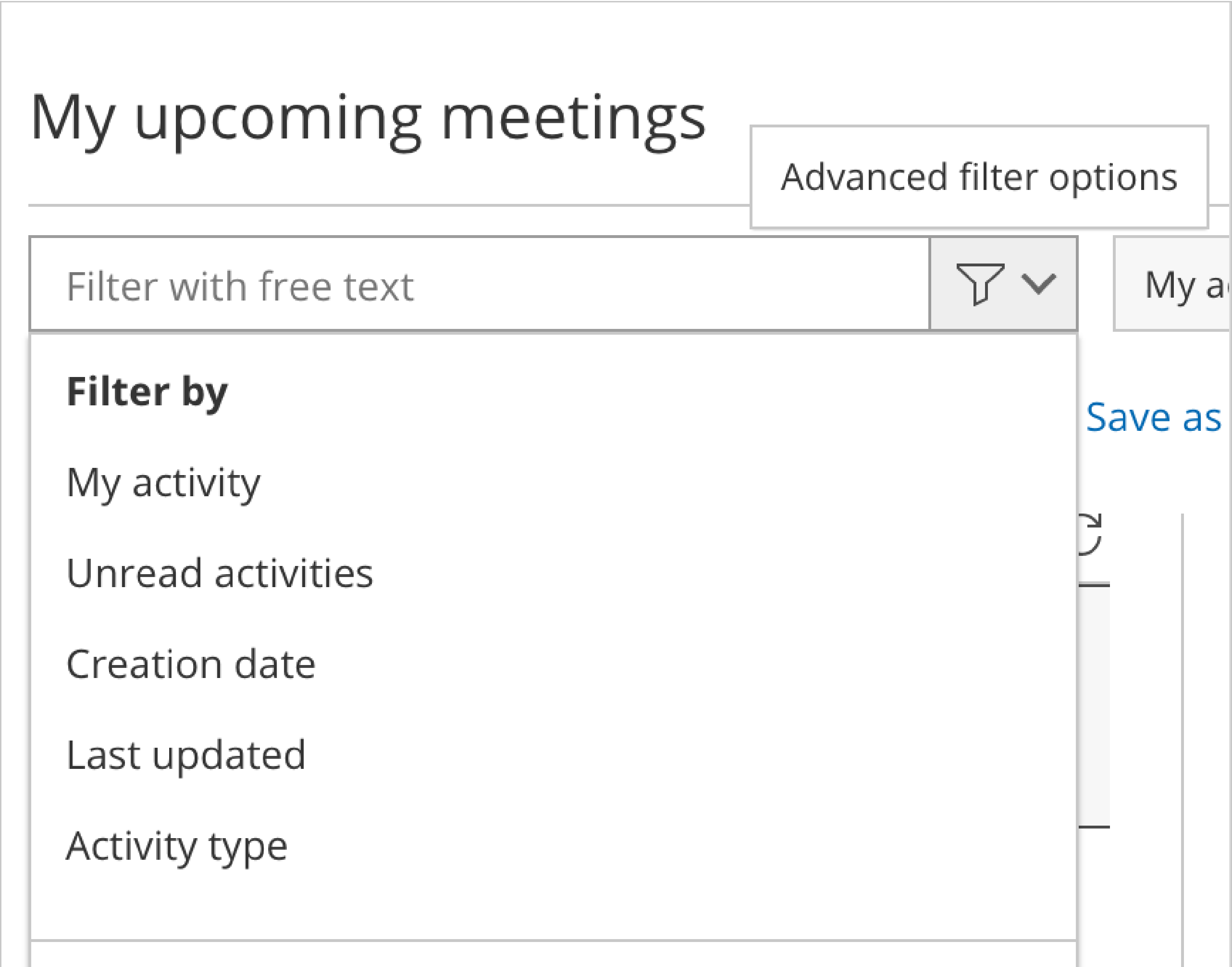

Figure 4: Advanced filter options

Custom filters

Custom filters allow you to create and save a selection of filters for quick and convenient access (Figure 5).

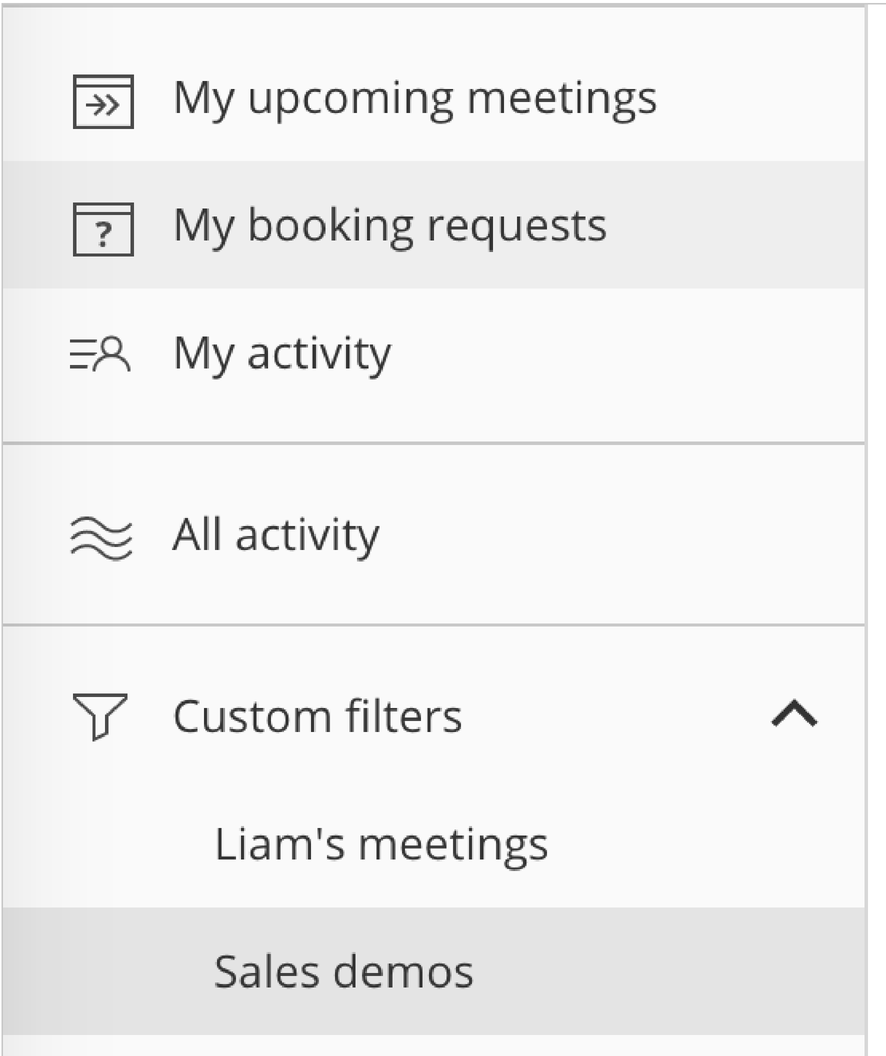

Figure 5: Accessing your Custom filters

Exporting reports from the Activity stream

You can export the activities you're viewing by clicking on **Export** and selecting to export a CSV or Excel file.

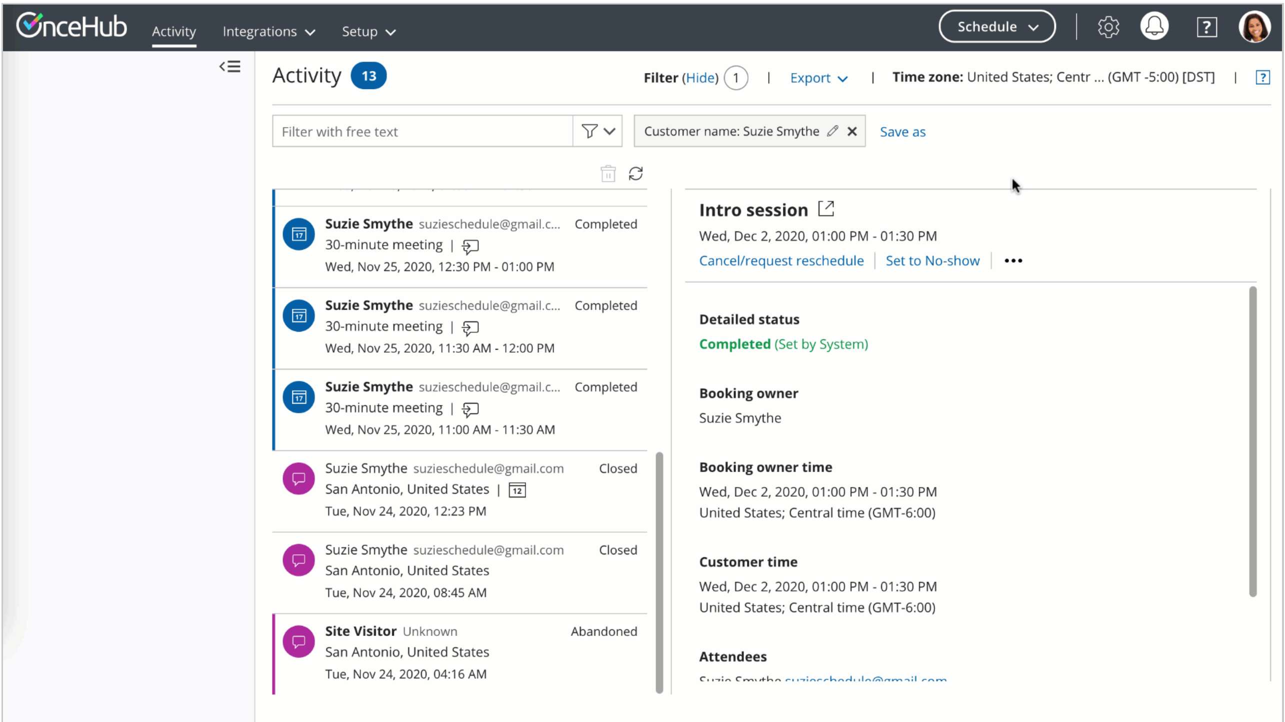

Figure 6: Export activity stream report

Booking pages with and without Event types

Booking pages **with** Event types

If the Booking page is linked to Event types, you have the following options:

- Cancel the booking and send a reschedule request for the **same** Event type.
- Cancel the booking and send a reschedule request for **any** Event type.
- Cancel the booking.

Booking pages **without** Event types

If the Booking page is not linked to any Event types, you have the following options:

- Cancel the booking and request reschedule.
- Cancel the booking.

Issuing a refund

If you're using our payment integration, you can choose to issue a manual refund when you cancel a booking or request a reschedule for any bookings made using an Event type. You can issue manual refunds directly from the Activity stream.

To issue a refund via OnceHub, you must meet the following requirements:

- Be the Owner or the Editor of the activity.
- Have the permission to refund via OnceHub.
- Enable the manual processing of refunds via OnceHub.

To issue a refund, follow these steps:

1. Click on the Transaction from your Activity stream (Figure 4).

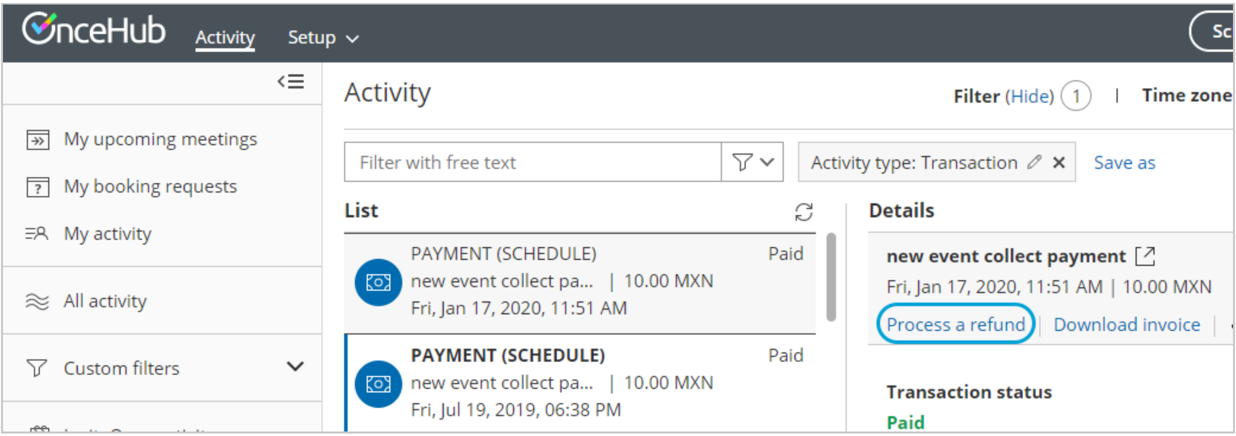

Figure 4: Issuing a manual refund

2. In the **Details** pane, click **Process a refund**.
3. Then, enter the amount to refund and click **Refund**.

Reassigning a booking

Booking reassignment lets you reassign bookings from one Team member to another. This is useful if a Team member is sick, or if a different Team member is better able to serve a specific customer.

Booking reassignment from one User to another is available to Users who are both connected to Google Calendar, or Users who are both not connected to any calendar.

Note:

You can only reassign bookings between Users with **similar calendar configurations**. For example, you can reassign a booking from a User connected to Google Calendar to another User who is also connected to Google Calendar.

You cannot reassign a booking from a User who is **not connected** to any calendar to a User who **is connected** to Google Calendar, and vice versa.

To reassign a booking, follow the steps below.

1. Select the activity in the Activity stream.
2. In the **Details** pane, select **Reassign the booking** (Figure 5).

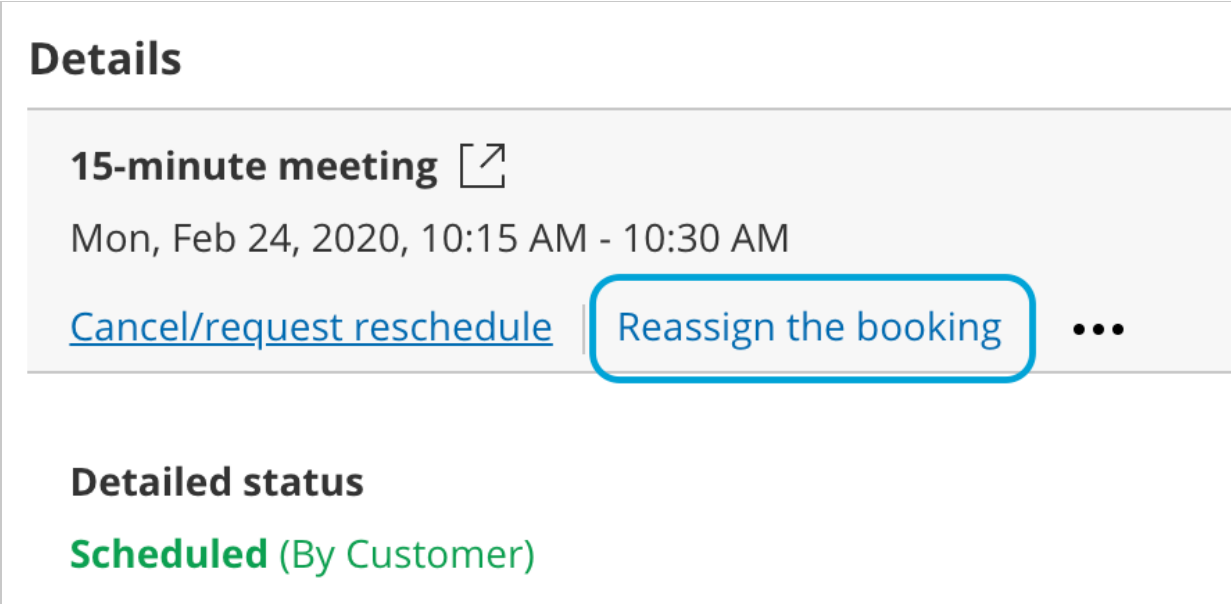

Figure 5: Reassign the booking

3. The **Reassign the booking** pop-up will appear.
4. Select the Booking page to which you'd like to reassign the booking.

Tracking and reporting of No-shows

When an activity has passed its scheduled time, the status of the activity is automatically set to **Completed**. If your Customer did not attend the meeting, you can change the **Completed** status to **No-show**.

To change the status to **No-show**, follow the steps below.

1. Select the activity in the Activity stream.
2. In the **Details** pane, select **Set to No-show** (Figure 6).

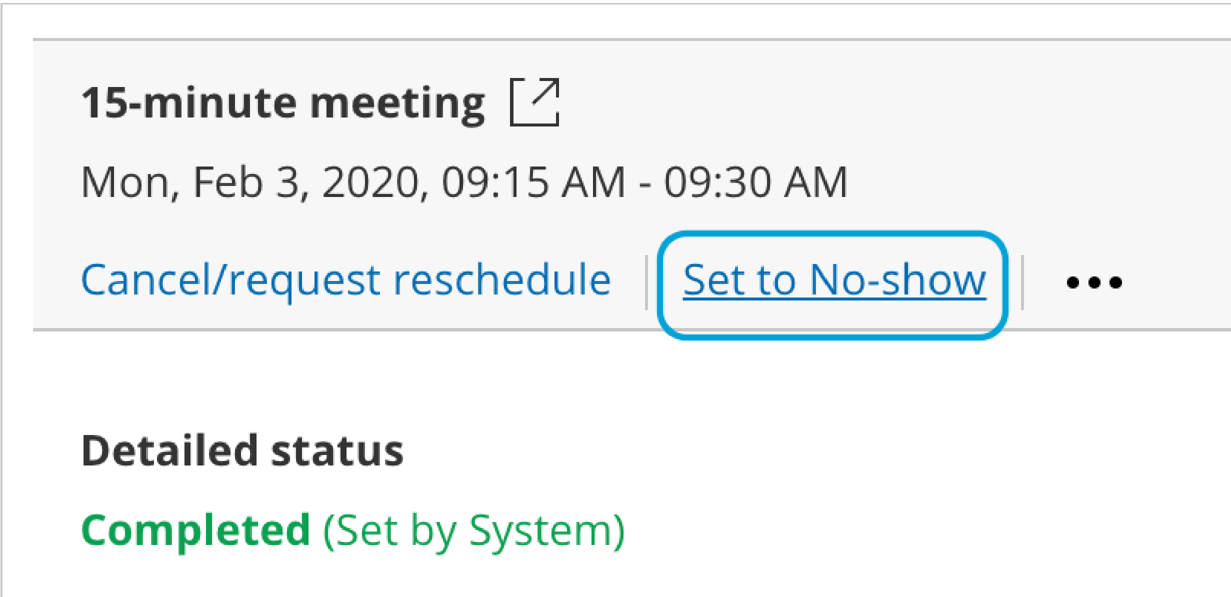

Figure 6: Set to No-show

3. The **No-show status** pop-up will appear.
4. Click **Yes** to set the status to **No-show**.

Note:

You cannot change the status back to **Completed**, so please be sure before you mark a booking as **No-show**.

Filtering the Activity stream

Your Activity stream is a central hub where you can view and manage all your activities, sorted by the last updated date. These include Bookings, Session packages, and Transactions.

There are four ways to filter the Activity stream: Default filters, Advanced filter options, the Free text filter, or Custom filters which you create.

Default filters

You can quickly filter your stream using OnceHub's out-the-box Default filters to show **My upcoming meetings**, **My booking requests**, **My activity**, and **All activity**. (Figure 1).

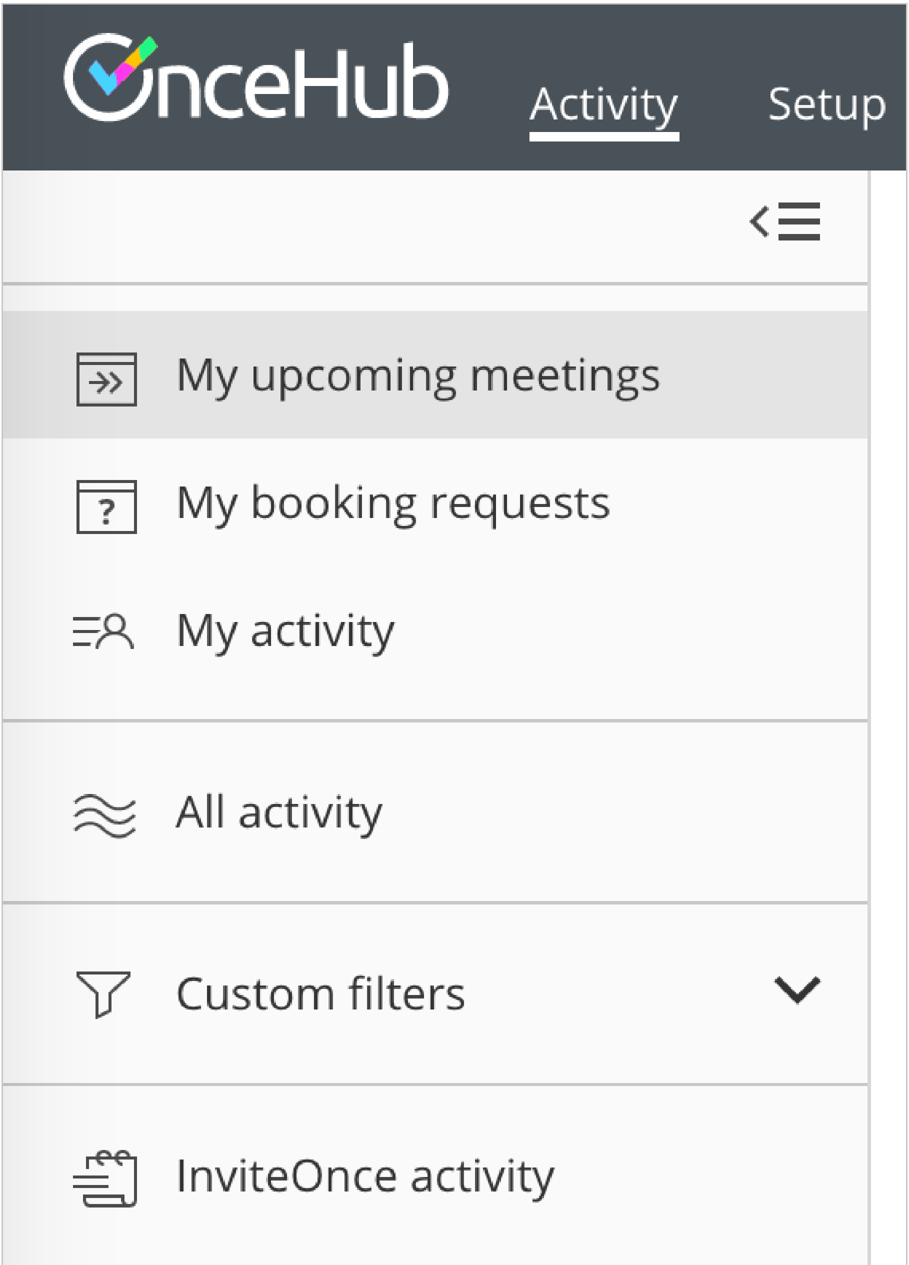

Figure 1: Default filters in the left sidebar

To use a Default filter, open the left sidebar and select it from the list. After you've selected your choice, the Activity stream will automatically update to show only relevant activities.

Advanced filter options

Advanced filter options allow you to filter activities according to specific parameters. Learn more about advanced filtering here.

Custom filters

You can also choose to save Custom filters that show specific activities that you may need to access often. There are a number of ways to create a Custom filter.

- Filter the Activity stream using the Free text filter, a collection of selected Advanced filter options, or both. Then, click **Save as**.
- Select a Default filter, then add additional Free text filters or Advanced filter options. Then, click **Save As** to

create a new Custom filter.

- Edit an existing Custom filter by adding or removing filters, then click **Save**.

Default filters

You can filter your Meetings inbox with a single click using our out-the-box Default filters. The Default filters available are **My upcoming meetings**, **My meetings**, **My booking requests**, and **All meetings**.

> **Note:**
>
> Only one Default filter can be applied at a time.

Applying Default filters

1. In the **Meetings** inbox, select a filter (Figure 1).

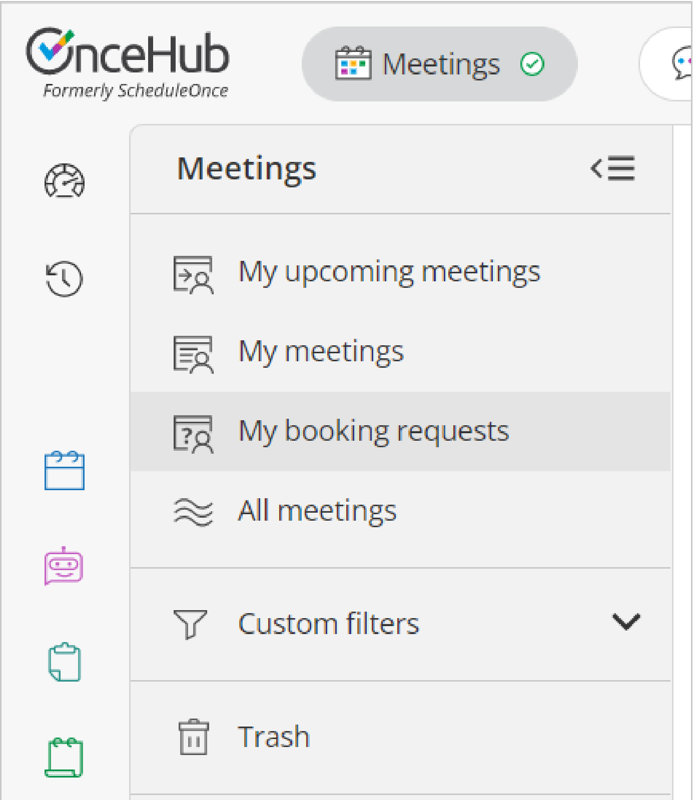

Figure 1: Select a default filter

2. After you select your choice, the inbox will automatically update to show only relevant activities.

Types of Default filters

You can select from three different Default filters. Default filters cannot be renamed, deleted, or modified.

- **My upcoming meetings**: This filter displays only scheduled, rescheduled, and canceled meetings with a date and time in the future, sorted by the meeting date. This allows you to focus on meetings that are coming up which you may need to prepare for, rather than meetings that have already happened. The current date is based on your time zone.
- **My meetings**: This filter displays all meetings booked on a Booking page for which you are the Owner, Editor,

or Additional team member.

- **My booking requests**: This filter only shows you booking requests that you need to approve. This filter lets you see which actions require responses on your part, all in the same place.
- **All meetings**: This filter displays all meetings within the OnceHub account for which you have the relevant permissions. Members see bookings from all pages where they are Owner, Editor, or an Additional team member in a panel. Admins see all bookings throughout the account.

If you want to filter the activities in your Meetings inbox by other characteristics, you can select a filter from the predefined list of Advanced filter options, or use the Free text filter.

> **Tip:**
>
> If you often make use of a particular default filter with a specific combination of free text filters and advanced filters, you can save the entire combination as a custom filter. Learn more about creating custom filters

Using the Free text filter

The Free text filter allows you to find specific activities in your Activity stream. To use the Free text filter, type in any information that appears in the details of an activity, such as the name of a Booking page owner, a Customer's name, a Customer's email address, or an Activity ID.

In this article, you'll learn about using the Free text filter.

Activity type fields

Each activity type has specific fields included in the activity details. When you enter information into the Free text filter, it filters through the following fields per Activity type.

Activity type	Fields
Customer	Customer name, Customer email, Customer company
Bookings	Meeting time, Booking status, Detailed booking status, Event type name, Booking page name, Master booking page name, Booking page owner
Session packages	Session package status, Event type name, Booking page name, Master booking page name, Booking owner
Transactions	Refund transaction date, Payment transaction date, Transaction status, Transaction type

** Note that Custom fields are not supported.*

Using operators

To make your Free text filter more precise, you can use specific search operators. Below is the list of search operators that you can use with the Free text filter.

" " Phrase search operator

Put multiple keywords or a phrase inside quotes " ". For example, "John Smith" filters all Activities that include exactly the full name John Smith. This is useful if you are looking for a specific company name or an Event type name.

* Suffix operator

Put an asterisk at the end of your word. For example, dan* returns all activities that have a term that starts with "dan", ignoring case.

OR operator

Put "OR" between each item of your filter. For example, John@example.com OR Bob@example.com searches for activities containing either John@example.com or Bob@example.com, or both of them.

AND operator

Put "AND" between each filter. For example, Scheduled AND Reassigned returns activities that are both scheduled and reassigned.

Creating Custom filters

If you often use a specific combination of filters to view activities in your Activity stream, you can save the entire combination as a Custom filter for quick and convenient access.

Custom filters that you have created and saved will only show up in your account. They are not shared with other team members. When an activity is updated or a new activity is created, it will automatically be reflected in Custom filters if relevant.

In this article, you'll learn how to create Custom filters from the Activity stream.

Possible filter combinations

Custom filters can be made up of any combination of Advanced filter options, Free text filters, and a Default filter. Or, you can choose to save a single unique Free text filter as a Custom filter.

Using Custom filters enables you to have custom predefined views in your Activity stream. For example, you might want to quickly access all bookings created by a top prospect, or view all reassigned bookings.

> **Note:**
>
> Only one Default filter can be applied at a time, and only one Default filter can be saved as part of a Custom filter.

Saving filters as a Custom filter

1. In the **Activity stream**, apply the specific combination of filters you require.
2. Then, click **Save as** (Figure 1).

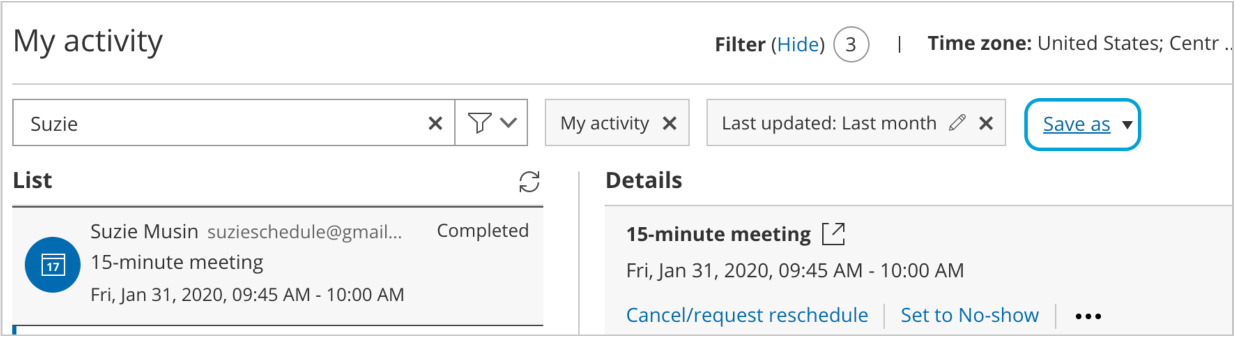

Figure 1: Click Save as to create a Custom filter

3. The **Save filter** pop-up appears. Enter a name for your Custom filter and click **Save new filter**.

Accessing Custom filters

To access a saved Custom filter, open the left sidebar and select the saved filter from the **Custom filters** list (Figure 2).

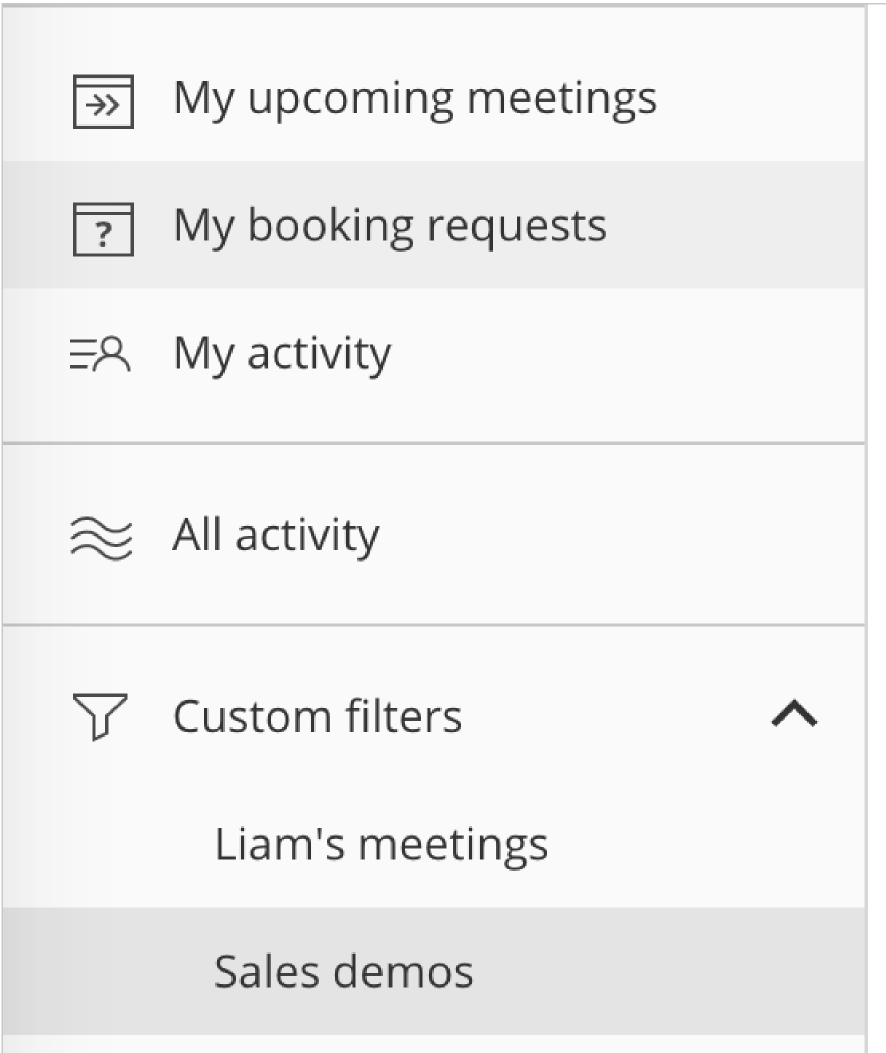

Figure 2: Access Custom filters

Editing existing Custom filters

You can edit any existing Custom filter by following the steps below.

1. In **Custom filters** in the left sidebar, select the Custom filter you want to edit.
2. Then, add or remove the filters you require.
3. Click **Save** (Figure 3).

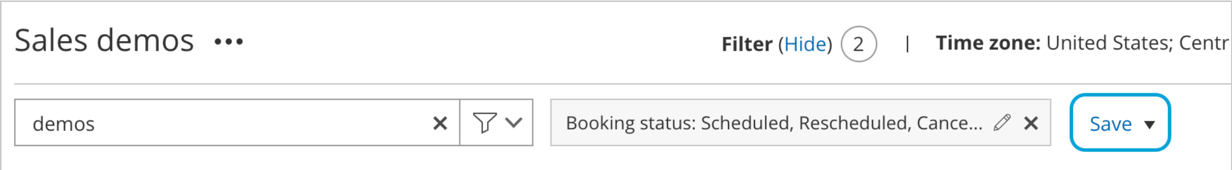

Figure 3: Click Save to save changes made to your Custom filter

4. If you want to save your adjusted filter as a new Custom filter, click the arrow next to **Save** and select **Save as**.
5. The **Save filter** pop-up appears. Enter a name for your Custom filter and click **Save new filter.**

You can also rename or delete any Custom filter. To do this, click action menu (three dots) next to the Custom filter name and select the relevant option from the menu (Figure 4).

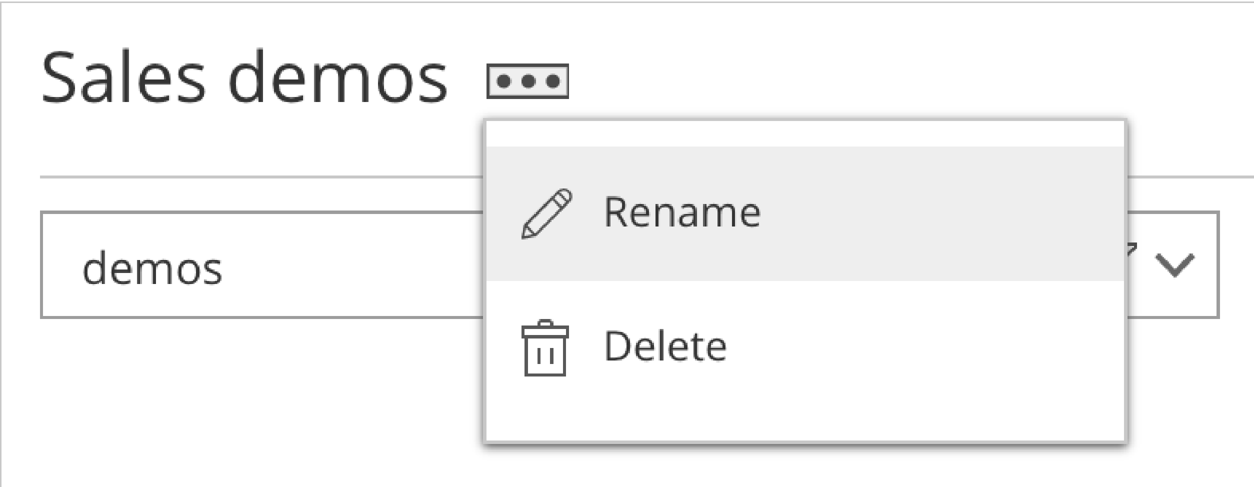

Figure 4: Rename or delete a Custom filter

Using Advanced filter options

Advanced filter options allow you to filter activities according to specific parameters. In this article, you'll learn about using Advanced filter options.

To view the list of parameters, click the filter box at the top of the Activity stream. You'll be presented with a list of available filters to choose from, including **My activity**, **Unread activities**, **Creation date**, **Last updated**, and **Activity type**, and **Contact status**.

You can also access additional filter options by selecting **Customer**, **Bookings**, **Session packages**, **Transactions, Conversations, Forms, UTM parameters**. Inside each of these folders are options for additional filters. Find the full breakdown of filter options here.

Once you have selected a parameter to filter by, you can refine your results by selecting additional filters. You can also save a combination of filters if you want to reuse it. This can be useful when only certain activities are relevant to you.

To view the list of parameters, click the filter box at the top of the Activity stream (Figure 1).

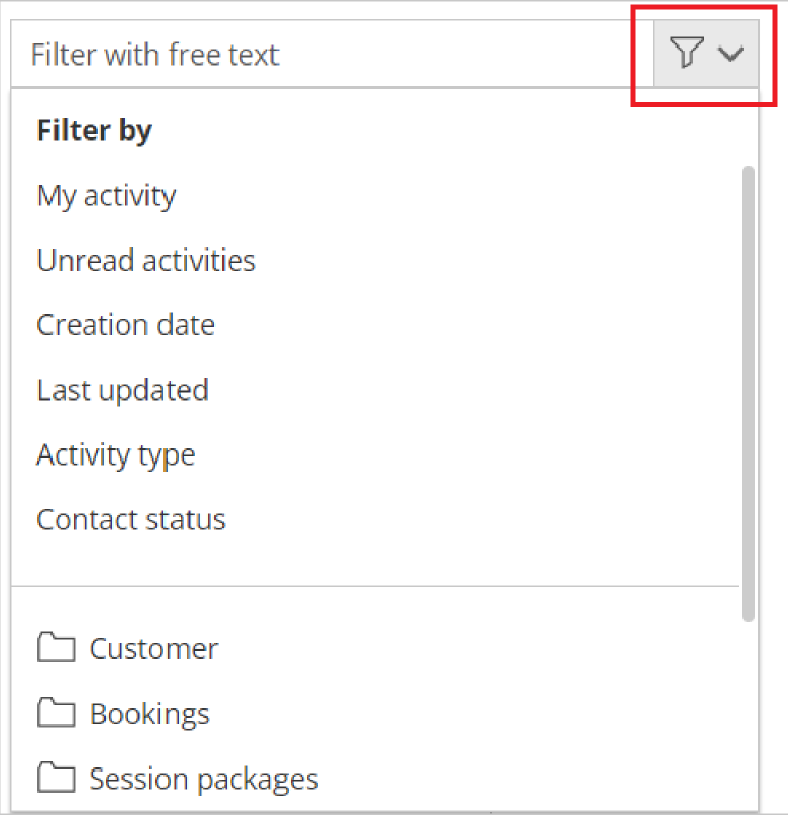

Figure 1: Advanced filter options box

> **Tip:**
>
> You can share filters between members of your organization.

After you've selected a filter, you can further refine the results by selecting additional filters, or by using the Free text filter:

The Free text filter

The Free text filter allows you to find activities by typing in any information included in the activity details (Figure 3). For example, you could filter by using the name of a Booking page Owner, a Customer’s name, a Customer's email address, or an Activity ID.

Operators such as AND/OR can be used to refine your search. For example, you might want to look for two different activities based on Booking IDs, or retrieve the bookings scheduled by two Customers.

There is no limit to the number of Free text filters you can use to filter the Activity stream.

Advanced filter options list

The following filters allow you to filter through all activities in the Activity stream.

Filter name	Description
Free text filter	Filter the Activity stream based on any information you type in.

My activity	Filter the Activity stream to show all bookings for which you are the Owner, Editor, or Additional team member.
Unread activities	Filter the Activity stream to show unread activities for Bookings, Session packages, and Transactions.
Creation date	• Today: search all activities created today. • Last 3 days: search all activities created in the last 3 days from today's date and time. • Last week: search all activities created in the last 7 days from today's date and time. • Past dates: search all activities created in the past from today's date and time. • Last month: search all activities created in the previous month from today's current month. • Specific dates: search for activities created in the date range you have selected.
Last updated date	• Today: search all activities updated today. • Last 3 days: search all activities updated in the last 3 days from today's date and time. • Last week: search all activities updated in the last 7 days from today's date and time. • Last month: search all activities updated in the previous month from today's current month. • Past dates: search all activities updated in the past from today's date and time. • Specific dates: search for activities updated in the date range you have selected.
Activity type	Filter the Activity stream to show Bookings, Session packages, Transactions, Conversations, or Forms.
Contact status	Filter the Activity stream by a contact's status: Qualified, Marketing qualified, Sales qualified, Disqualified, or No status

Customer filters

Customer filters name	Description
Customer name	Filter bookings by Customer name
Customer email	Filter bookings by Customer email
Customer company	Filter bookings by Customer company

Bookings filters

The following filters allow you to filter the Activity stream for bookings only.

Bookings filter name	Description
Meeting time	• Today: search all activities created today. • Next 3 days: search all activities created in the next 3 days from today's date and time. • Next week: search all activities created in the next 7 days from today's date and time. • This month: search all activities created in the current month. • Future dates: search all activities created in the future from today's date and time. • Specific dates: search for activities scheduled or rescheduled in the date range you have selected.
Booking status	Filter bookings to show Requested, Scheduled, Rescheduled, Canceled, No-show, or Completed activities.
Detailed booking status	Filter bookings to show Requested (By Customer), Requested (Initiated by User), Scheduled (Approved by User), Scheduled (By Customer), Scheduled (Reassigned by User), Rescheduled (Approved by User), Rescheduled (By Customer), Rescheduled (Initiated by User), Rescheduled (Reassigned by User), Canceled (New times requested by User), Canceled (By Customer), Canceled (By User), Canceled (Reschedule requested by User), No-show (Set by User), or Completed (Set by System) activities.
Event type name	Filter bookings by Event type name. If you update the Event type name, it will be reflected in the filter and in the Activity stream.
Booking page name	Filter bookings by Booking page name. If you update the Booking page name, it will be reflected in the filter and in the Activity stream.
Master page name	Filter bookings by Master page name. If you update the Master page name, it will be reflected in the filter and in the Activity stream.
Booking Calendar Name	Filter bookings by Booking Calendar name. If you update the Master page name, it will be reflected in the filter and in the Activity stream.
Meeting Owner	Filter bookings by the meeting owner's name. If you update the meeting owner, it will be reflected in the filter and in the Activity stream.

Session packages filters

The following filters allow you to filter the Activity stream for Session packages only.

Session packages filter name	Description

Session package status	Filter Session packages to show created, updated, or completed activities.
Event type name	Filter bookings by Event type name. If you update the Event type name, it will be reflected in the filter and in the Activity stream.
Booking page name	Filter bookings by Booking page name. If you update the Booking page name, it will be reflected in the filter and in the Activity stream.
Master page name	Filter bookings by Master page name. If you update the Master page name, it will be reflected in the filter and in the Activity stream.
Booking page Owner	Filter bookings by Booking page Owner name. If you change the Booking page Owner, it will be reflected in the filter and in the Activity stream.

Transactions filters

The following filters allow you to filter the Activity stream for payment transactions only.

Transactions filter name	**Description**
Refund transaction date	• Today: search all transactions refunded today. • Last 3 days: search all transactions refunded in the last 3 days from today's date and time. • Last week: search all transactions refunded in the last 7 days from today's date and time. • Last month: search all transactions refunded in the previous month from today's current month. • Past dates: search all transactions refunded in the past from today's date and time. • Specific dates: search all transactions refunded in the date range you have selected.
Payment transaction date	• Today: search all transactions paid today. • Last 3 days: search all transactions paid in the last 3 days from today's date and time. • Last week: search all transactions paid in the last 7 days from today's date and time. • Last month: search all transactions paid in the previous month from today's current month. • Past dates: search all transactions paid in the past from today's date and time. • Specific dates: search all transactions paid in the date range you have selected.
Transaction status	Filter bookings to show Paid, Refunded, Refund pending, Refund failed, or Pending activities.

Transaction type	Filter bookings to show PAYMENT (SCHEDULE), PAYMENT (RESCHEDULE), PAYMENT PENDING (SCHEDULE), AUTOMATIC REFUND (CANCELLATION), AUTOMATIC REFUND PENDING (CANCELLATION), MANUAL REFUND VIA ONCEHUB, or MANUAL REFUND VIA PAYPAL.

Conversations filters

Conversations filter types	Description
Chatbot	View conversations from selected Chatbots.
Booking in conversation	Filter by chatbot conversations that **received** or **did not receive** a booking.
Started from URL	Provide a URL and filter by chatbots that were accessed from that URL.
AI usage	Choose between: At least [X] AI messages – Users can adjust this to any number between 0 and 999. No AI messages – Filter for conversations that include no AI interaction. Apply the filter to view only conversations matching the specified AI message criteria.
Completed time	• Today: search all conversations completed today. • Next 3 days: search all conversations completed in the next 3 days from today's date and time. • Next week: search all conversations completed in the next 7 days from today's date and time. • This month: search all conversations completed in the current month. • Future dates: search all conversations completed in the future from today's date and time. • Specific dates: search for conversations completed in the date range you have selected.
Transcript	Use free text to filter transcripts by words used in the conversation.
Conversation status	Filter by whether the conversation was **Closed** or **Abandoned**. "Closed" means that the conversation progressed to the last interaction in the chatbot; "Abandoned" means that the chatbot was interacted with one or more times, but did not reach the final interaction within a certain timeframe.
Conversation rating	Filter by the rating left by the visitor, from 1 to 5 stars.
Live chat in conversation	Did the conversation result in a live chat conversation? Yes, No, or Timed out.

Forms filters

Forms filter types	**Description**
Form name	Choose from a list of your forms to filter by.
Booking in form	Filter by form conversations that **received** or **did not receive** a booking.
Completed time	• Today: search all conversations completed today. • Next 3 days: search all conversations completed in the next 3 days from today's date and time. • Next week: search all conversations completed in the next 7 days from today's date and time. • This month: search all conversations completed in the current month. • Future dates: search all conversations completed in the future from today's date and time. • Specific dates: search for conversations completed in the date range you have selected.
Transcript	Use free text to filter transcripts by words used in the conversation.
Form status	Filter by whether the conversation was Closed or Abandoned. "Closed" means that the conversation progressed to the last interaction in the form; "Abandoned" means that the form was interacted with one or more times, but did not reach the final interaction within a certain timeframe.
Live chat in form	Did the conversation result in a live chat conversation? Yes, No, or Timed Out.

UTM parameters

UTM parameters filter types	**Description**
Source	Filter by **Source** parameter with free text.
Medium	Filter by **Medium** parameter with free text.
Campaign	Filter by **Campaign** parameter with free text.
Term	Filter by **Term** parameter with free text.
Content	Filter by **Content** parameter with free text.

How to share a filtered view of the Activity stream with another team member

Your Activity stream is where you can view and manage all your activities. The Activity stream shows all Booking, Session package, and Transaction activities that have been created in your account, sorted by last updated date. You can use filters to display only relevant activities in the stream.

In some cases, you may want to send a filtered view of the Activity stream to another team member. For example, you might need to ask another OnceHub Administrator to reassign a list of bookings appropriately.

When you add filters to the Activity stream, parameters are added to the page URL (Figure 1). To share this filtered view, copy the page URL and send it to another team member via email.

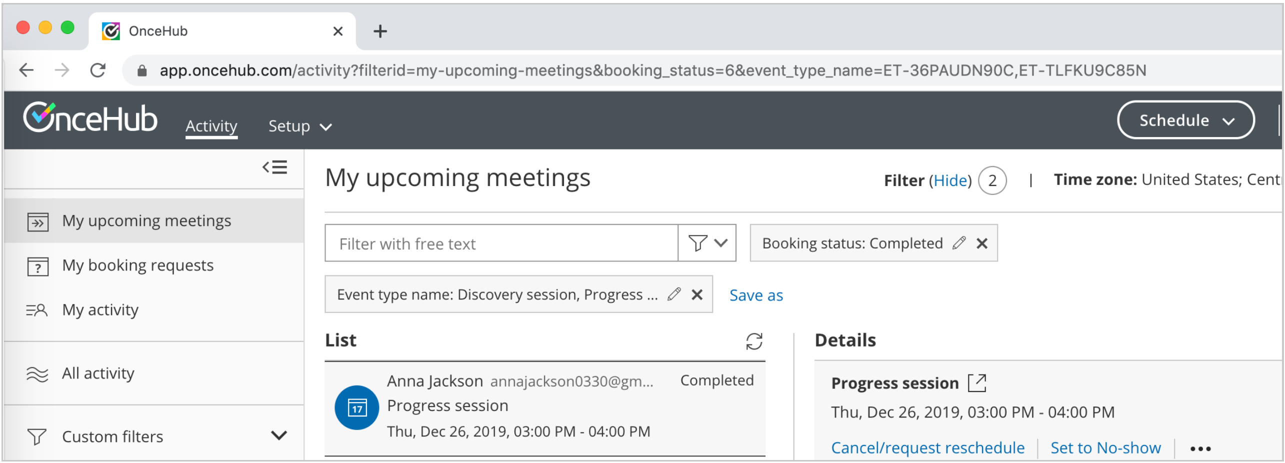

Figure 1: Selected filters added to the page URL

When the team member clicks the link, the Activity stream will open and display the filters applied in the URL. The team member can then create a Custom filter from this filtered view for easy access in the future.

Available parameters

Below is the list of URL parameters available for the Activity stream.

Field available	Parameter
Creation date	creation_date
Last updated	last_updated
Activity type	activity_type
Activity ID	activity_id
Unread activities	unread_activities
Sort by	sort_by
Bookings	
Meeting time	meeting_time
Booking status	booking_status

Booking detailed status	booking_detailed_status
Event type name	event_type_name
Booking page name	booking_page_name
Master page name	master_page_name
Booking page Owner	booking_page_owner
Customer name	customer_name
Customer email	customer_email
Customer company	customer_company
Session packages	
Session package status	session_package_status
Event type name	event_type_name_sp
Booking page name	booking_page_name_sp
Master booking page name	master_page_name_sp
Booking page Owner	booking_page_owner_sp
Customer name	customer_name_sp
Customer email	customer_email_sp
Customer company	customer_company_sp
Transactions	
Payment transaction date	payment_transaction_date
Refund transaction date	refund_transaction_date
Transaction status	transaction_status
Transaction type	transaction_type

The Activity stream: Managing activities

Last Modified on May 31, 2024

The activity stream is the central hub where you can manage all of your booking and payment activity. The activity stream provides advanced filtering options to give you quick access to the information you require.

When you view a specific activity, you'll be able to view related activities, such as payments, rescheduled bookings, and cancellations.

You can access the activity stream by clicking on the icon in the left-hand-side toolbar (Figure 1).

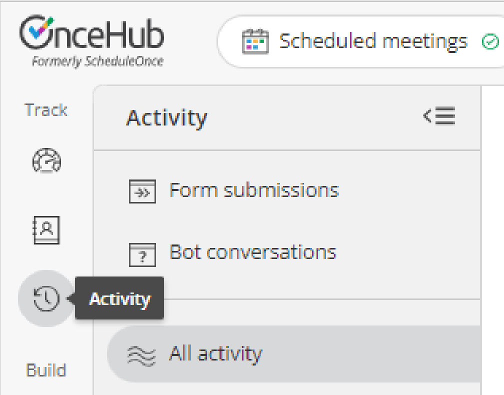

Figure 1: The activity stream icon

Read on to learn about the activity stream.

How can I view related activities?

To view related activities, select an activity from the Activity stream. Then, in the **Details** pane for that activity, select **View related activities** from the action menu (Figure 1).

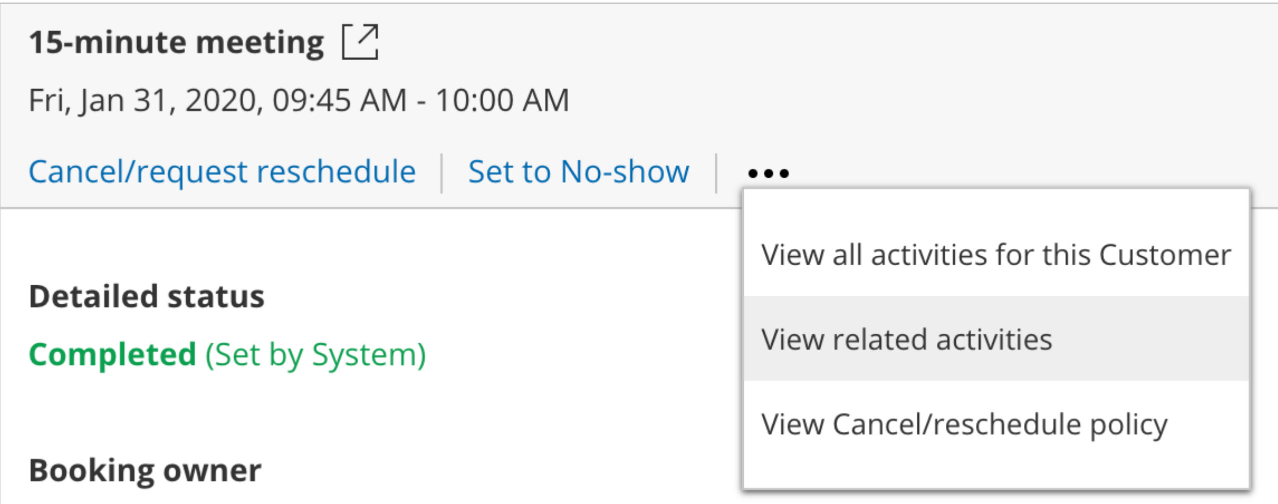

Figure 1: View related activities

What related activities can I see?

When a booking is made, it can be related to a session package, a transaction, or another booking. Related activities are relevant in the following scenarios.

Booking request: New times requested by user

A booking request is made and the user cancels and requests new times. When the booking request is resubmitted by the customer, both the canceled booking request and resubmitted booking request are related.

Booking rescheduled by user

The booking is canceled by the user and a request to reschedule is sent. When the booking is rescheduled by the customer, the canceled booking and rescheduled booking will be related.

Booking rescheduled on different booking page by customer

The booking is rescheduled by the customer with a different booking page. Both the canceled booking and rescheduled booking will be related.

Session package scheduled

When a Session package is scheduled. Sessions that are part of the package and the Session package itself are related.

Payment integration used

When payment integration is used, all paid and refunded transactions are related to the booking or Session package.

Understanding scheduling activity statuses

All bookings follow a lifecycle. Depending on which phase of the lifecycle a booking is in, its scheduling status changes, as do the scheduling actions available to you.

In the Activity stream, bookings are given a status. In the **Details** pane for a given activity, you'll see a **Detailed status** which provides additional information about the activity (Figure 1).

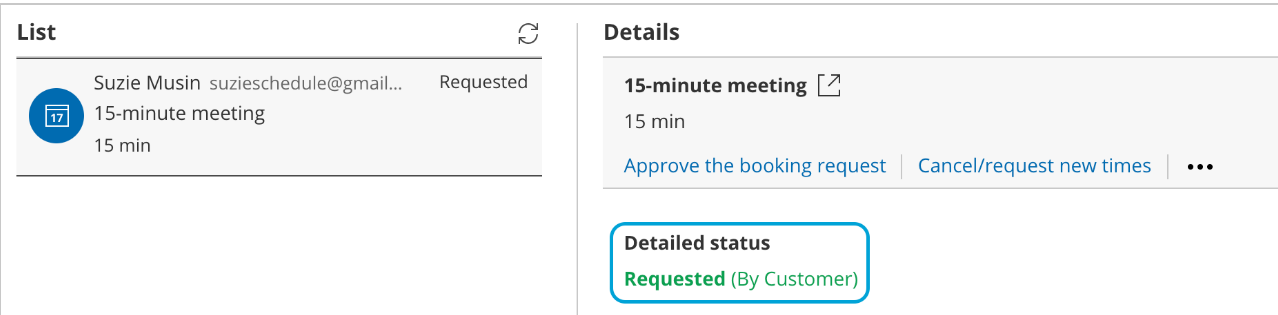

Figure 1: Detailed status

All OnceHub reports make use of scheduling statuses to allow you to easily view the stage of bookings within the lifecycle. Scheduling statuses are also used with our Third-party integrations.

Booking status and Detailed status

The table below shows the different lifecycle phases, their associated statuses, and the respective actions that are available in the Activity stream.

Scenario	Status	Detailed status	Menu actions

Customer schedules a booking	Scheduled	Scheduled (By customer)	Cancel/request reschedule Reassign booking Set to No-show
Customer submits a booking request	Requested	Requested (By customer)	Schedule booking request Cancel/request new times
Customer cancels and submits new requests	Canceled Requested	Canceled (By customer) Requested (By customer)	Schedule booking request Cancel/request new times
User approves the booking request	Scheduled Rescheduled	Scheduled (Approved by user) Rescheduled (Approved by user)	Cancel/request reschedule Reassign booking Set to No-show
User cancels and requests new times	Canceled Requested	Canceled (New times requested by user) Requested (Initiated by user)	Schedule booking request Cancel/request new times
Customer reschedules a booking with same BP	Rescheduled	Rescheduled (By customer)	Cancel/request reschedule Reassign booking Set to No-show

Customer reschedules a booking with different BP	Rescheduled	Rescheduled (By customer)	Cancel/request reschedule Reassign booking Set to No-show
Customer cancels a booking	Canceled	Canceled (By customer)	
User cancels a booking or booking request	Canceled	Canceled (By user)	
User cancels and sends a request to reschedule with same Event type	Canceled Rescheduled	Canceled (Reschedule requested by user) Rescheduled (Initiated by user)	Cancel/request reschedule Reassign booking Set to No-show
User cancels and sends a request to reschedule with any Event type	Canceled Scheduled	Canceled (Reschedule requested by user) Scheduled (By customer)	Cancel/request reschedule Reassign booking Set to No-show
User sets the booking to No-show	No-show	No-show (Set by user)	Cancel/request reschedule
Booking is complete	Completed	Completed (Set by System)	Cancel/request reschedule Set to No-show
User reassigns a scheduled booking	Scheduled	Scheduled (Reassigned by user)	Cancel/request reschedule Reassign booking Set to No-show

User reassigns a rescheduled booking	Rescheduled	Rescheduled (Reassigned by user)	Cancel/request reschedule Reassign booking Set to No-show
Customer requests a booking time for approval but the requested time passes before user takes action	Expired	Expired (Set by System)	Cancel/request new times

Managing bookings from the Activity stream

The Activity stream is the central hub where you can manage all of your booking and payment activities. The Activity stream provides advanced filtering options to give you quick access to the information you require.

When you view a specific activity, you'll be able to view related activities, such as payments, rescheduled bookings, and cancellations. You can also perform actions such as reassigning a booking or requesting to reschedule.

You do not need an assigned product license to access the Activity stream.

Read on to learn about the actions that you can perform from the Activity stream.

Actions on your bookings from the Activity stream

All bookings follow a lifecycle. Depending on which phase of the lifecycle a booking is in, its scheduling status changes, as do the scheduling actions available to you.

In the following sections, the different action options that are available will be discussed.

Responding to a booking request

When you use booking with approval mode and a booking request is submitted by a customer, you'll receive an email with suggested meeting times that were selected by the customer. In the activity stream, the **Details** pane for this booking activity with show the **Detailed status** as **Requested (By customer)** .

To approve a booking request

1. Select the activity in the Activity stream.
2. *In the **Details** pane, select **Approve the booking request** (Figure 1).*

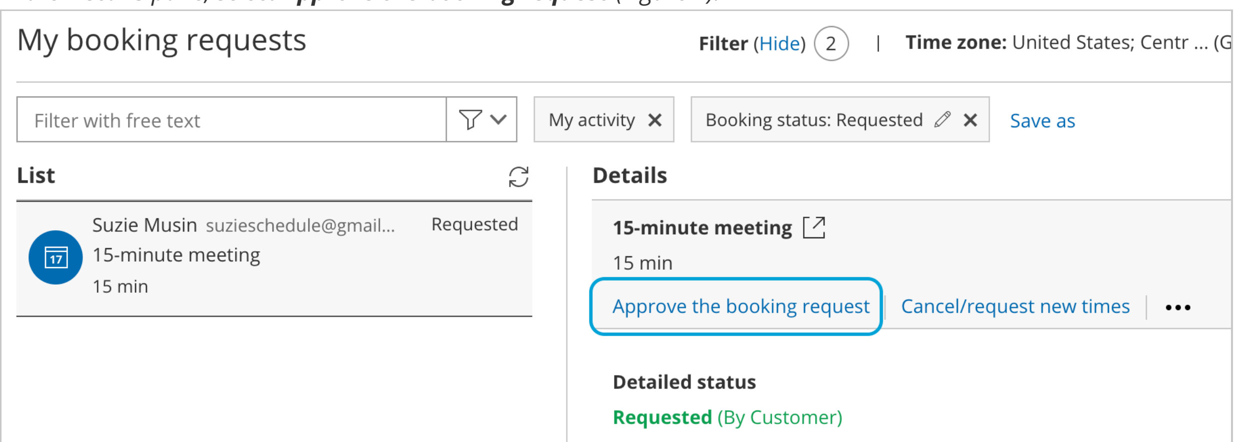

Figure 1: Approve the booking request

3. The **Find a time and schedule** page will open, where you can select a time for the booking and approve it.

To cancel a booking request or request new times

1. Select the activity in the Activity stream.
2. In the **Details** pane, select **Cancel/request new times** (Figure 2).

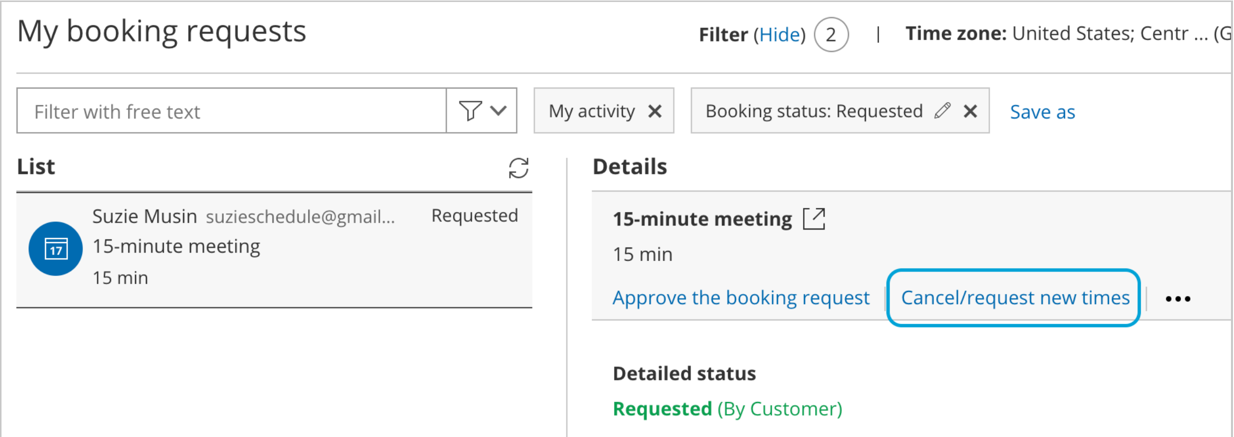

Figure 2: Cancel/request new times

3. The **Cancel/request new times** pop-up will appear.
4. You can then choose to either cancel the booking request, or cancel the booking request and request new times.

Canceling a booking

You can choose to cancel a booking if the booking has a status of **Scheduled**, **Rescheduled**, **Completed**, **No-show**, or **Canceled**.

To cancel a booking, follow these steps:

1. Select the activity in the Activity stream.
2. In the **Details** pane, select **Cancel** (Figure 3).

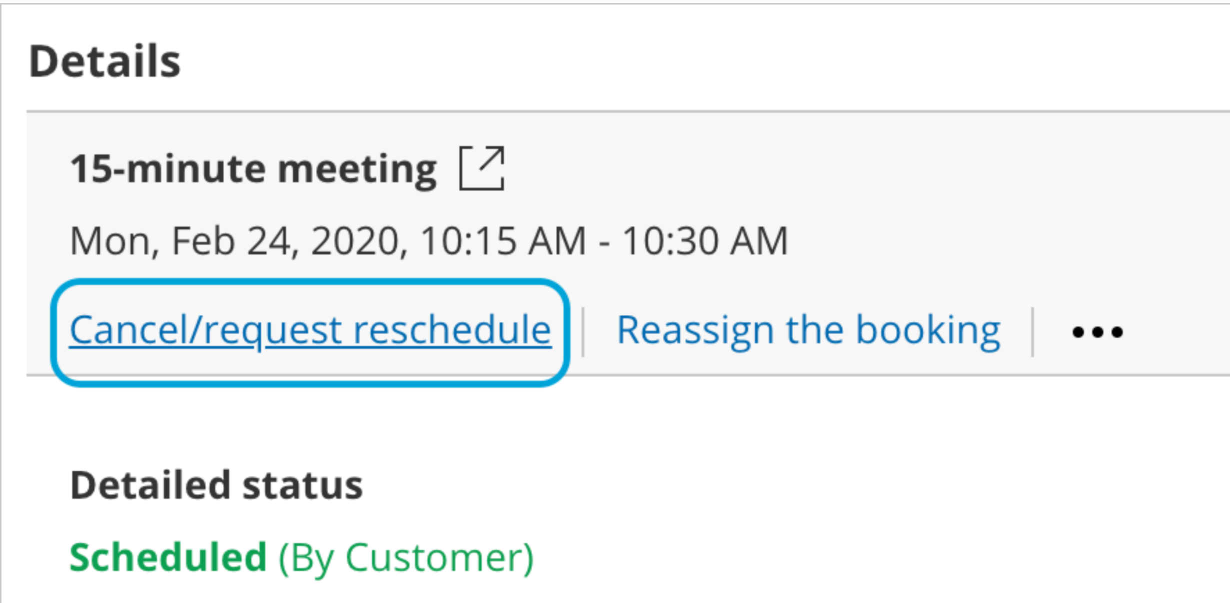

Figure 3: Cancel/request new times button

3. The **Cancel/request reschedule** pop-up will appear.

Reschedule a booking

If you or your customer is unable to make the original booking time, you can reschedule the booking yourself on your customer's behalf. This can be done even if the original meeting time has already passed.

To reschedule a meeting, follow these steps:

1. Find the booking in question in the activity stream.
2. Click **Reschedule**
3. A pop-up will appear, allowing you to choose between rescheduling the meeting yourself, or asking your customer to reschedule. Both of these options cancel the original meeting.
4. On selecting either option, you will be prompted to provide a reason for the rescheduling which will be shared with your customer.
    1. Selecting **Reschedule on behalf of the customer** will direct you to the relevant calendar, and display availability for rescheduling the meeting.
    2. Selecting **Ask the customer** will provide them with the relevant calendar, and allow them to choose a new time for the meeting.
5. Once you have selected a new time, click **Reschedule.** The confirmation will be shared with your customer.

> **Note:**
>
> You can only reschedule a meeting if you are the host or owner of the meeting, or if you are an admin.

Depending on whether the booking page that the booking was made on is associated with Event types or not, the actions available in the **Cancel/request new times** pop-up will change.

Session package statuses

Session packages let you offer your customers the opportunity to schedule multiple sessions at once. This is a great way to entice your customers to make a longer-term commitment. When scheduling with you, your customers will pick a number of different time slots that suit them and will only be required to provide their details once. See a demo.

You can access Session packages in the Activity stream (Figure 1) and see the related sessions that are part of the package.

Session packages have three possible statuses:

- **Created**: The customer has scheduled a Session package.
- **Updated**: When an individual session is canceled or rescheduled, the Session package status will change to **Updated**. In the **Details** pane, you can see the detailed status of each individual session.
- **Completed**: A session package is marked as **Completed** when all individual sessions that are in the package have taken place.

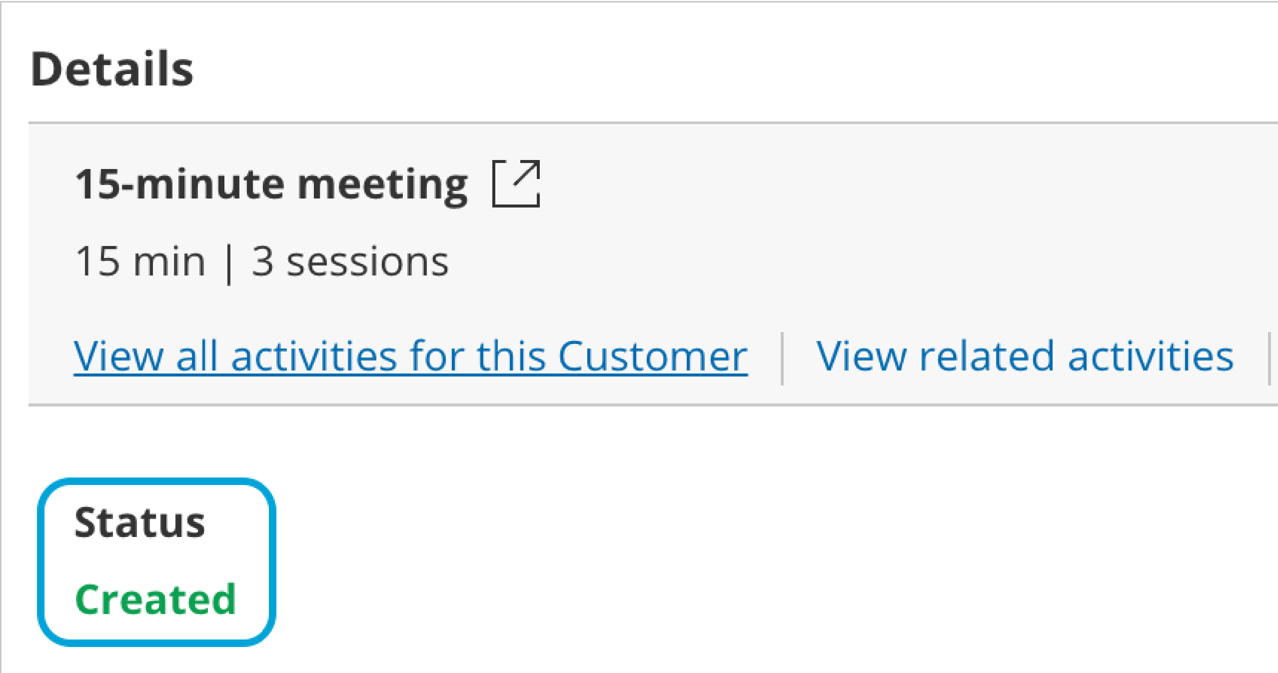

Figure 1: Session package status

Payment transaction types and statuses

OnceHub has partnered with PayPal to offer payment integration through all phases of the booking lifecycle. From the initial booking through to rescheduling and cancellations, you can increase sales, generate additional revenue streams, and reduce administrative overheads.

If you've set up Payment integration, transactions made via OnceHub will appear in the Activity stream with the relevant status and type (Figure 1). Transaction data is also available in the Revenue reports.

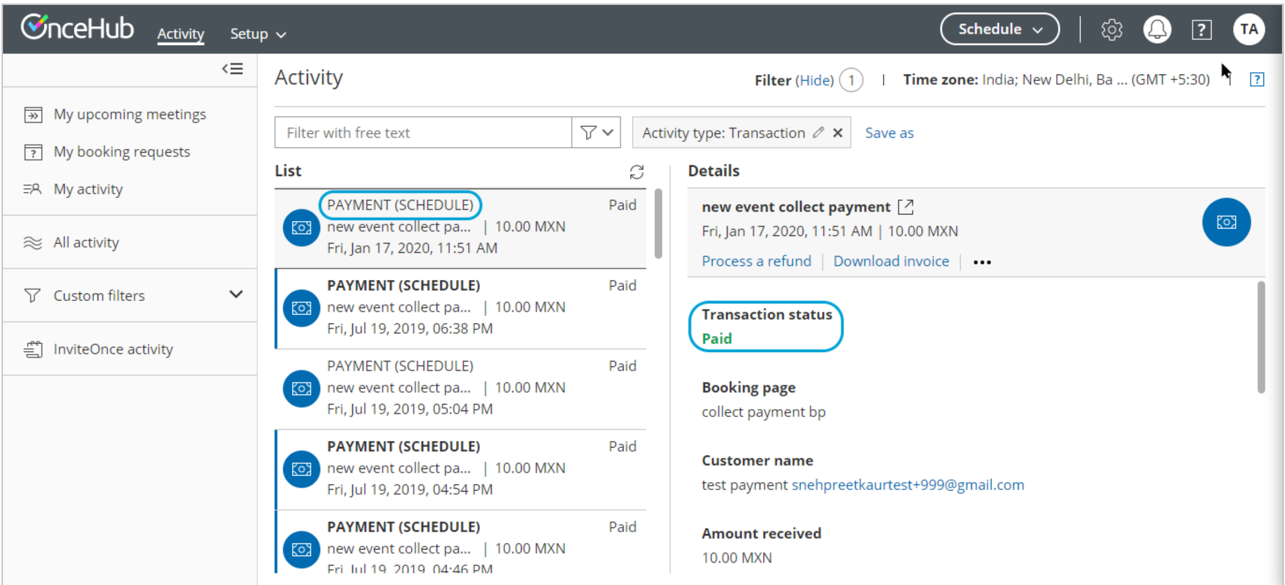

Figure 1: Transactions in the Activity stream

Below is the mapping of the scenarios, Transaction statuses, and Transaction types which are displayed in the Activity stream.

Scenario	Status	Transaction type	Menu actions

Customer schedules a booking and purchases the service	PAYMENT (SCHEDULE)	Paid	Process a refund Download invoice
Customer reschedules the booking and pays the reschedule fee.	PAYMENT (RESCHEDULE)	Paid	Process a refund Download invoice
Customer schedules a booking and purchases the service. The transaction is in a Pending status in PayPal.	PAYMENT PENDING (SCHEDULE)	Pending	Download invoice
Customer cancels the booking and automatically receives the refund for the service.	AUTOMATIC REFUND (CANCELLATION)	Refunded	Download invoice
Customer cancels the booking and automatically receives the refund for the service. The transaction is in a Pending status in PayPal.	AUTOMATIC REFUND PENDING (CANCELLATION)	Refund pending	Download invoice
The user processed a refund directly via OnceHub.	MANUAL REFUND VIA ONCEHUB	Refunded	Download invoice
The user refunded the customer via PayPal. The transaction is reflected in the Activity stream.	MANUAL REFUND VIA PAYPAL	Refunded	

Activity IDs

Activity IDs are unique codes generated for each booking. The three types of Activity IDs are:

- Booking IDs
- Session package IDs
- Transaction IDs

Activity IDs are an invaluable tool for organizing and identifying individual activities. For example, say a customer calls you and wants to know specific information about their meeting or payment. Using the Activity ID, you can immediately pull up the information in the Activity stream and address your customer's request.

Using Activity IDs

To find the Activity ID for an associated booking, panel booking, session package, or transaction, follow these steps:

1. Select the activity in the Activity stream.
2. In the **Details** pane, scroll all the way down to the bottom.
3. The Activity ID is listed in the footer, next to the **Created** and **Updated** dates (Figure 1).

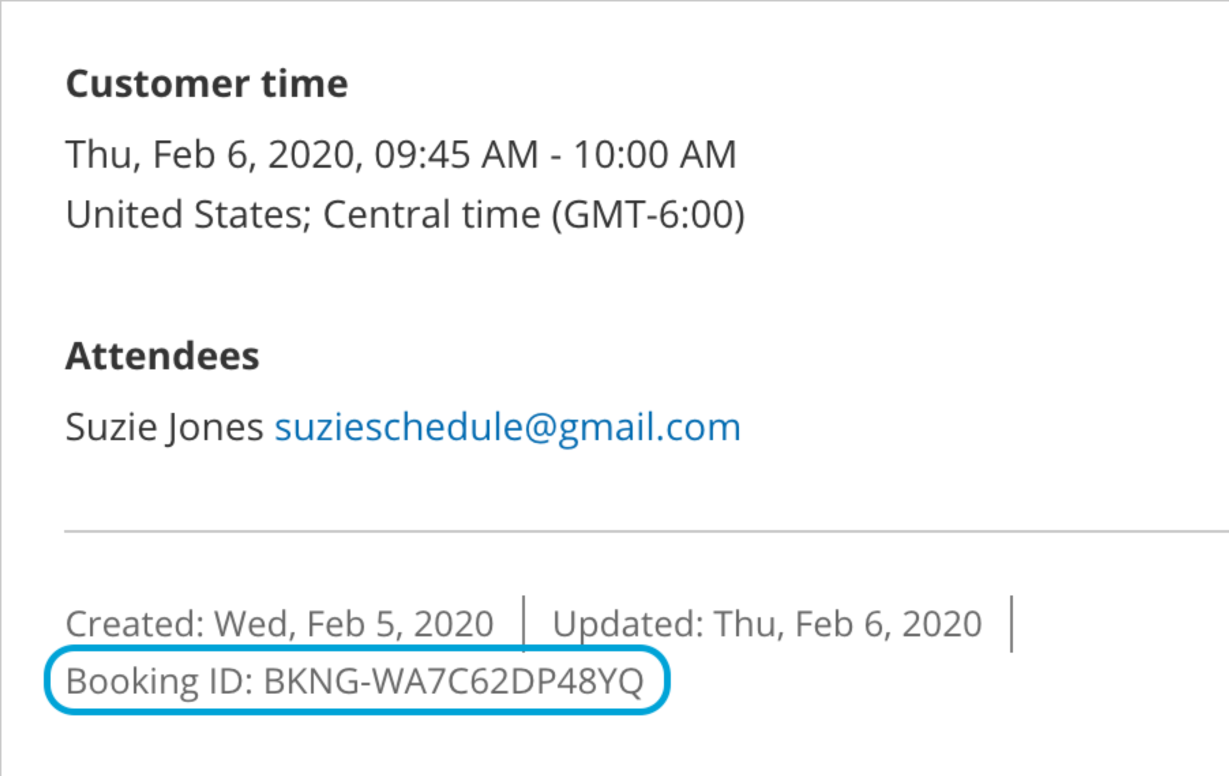

Figure 1: Activity ID

4. To search for a specific activity, enter the Booking ID or Session package ID in the Free text filter above the Activity stream (Figure 2).

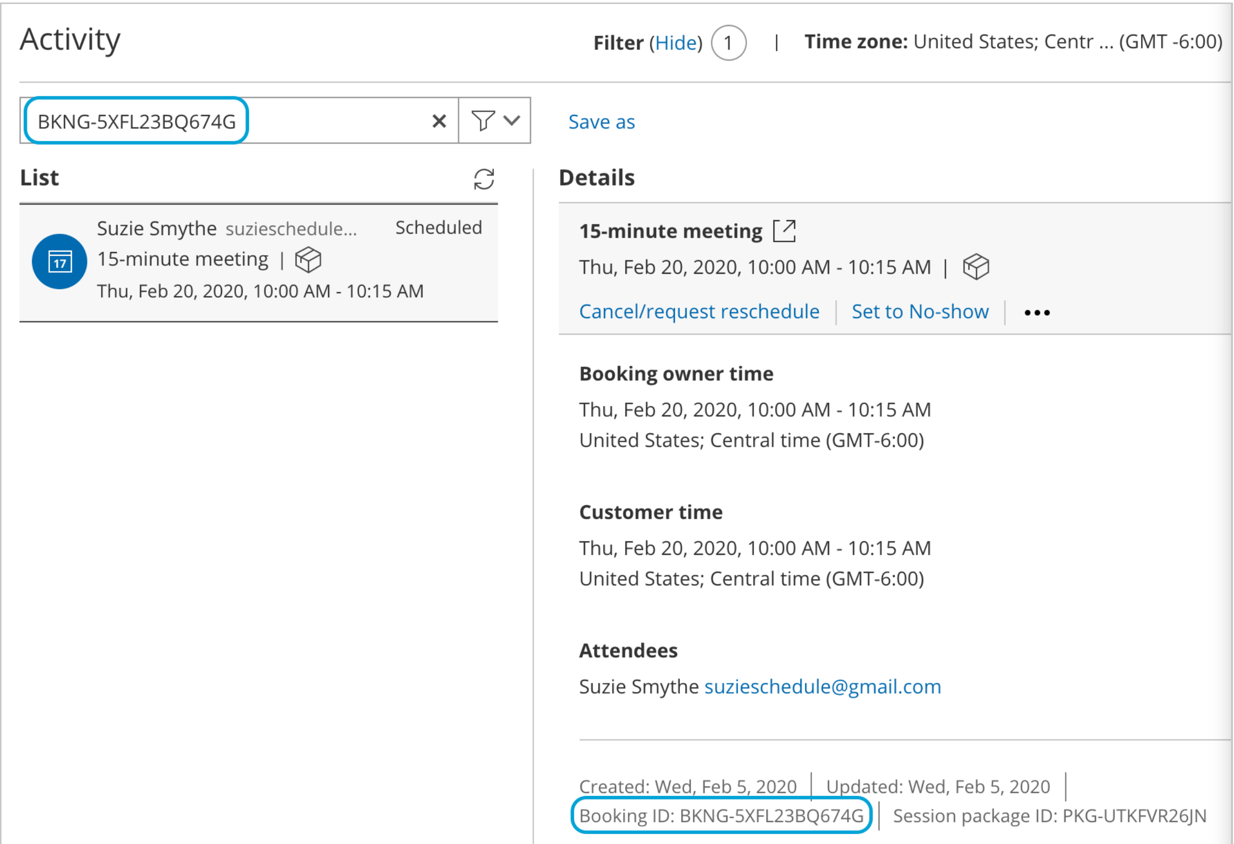

Figure 2: Free text filter with an Activity ID

5. To search for more than one ID, you can use the search operators available with the Free text filter.

Booking ID

All individual sessions booked via OnceHub have a Booking ID, a unique ID code that identifies every booked session; for example, Booking ID: BKNG-5XFL23BQ674G.

The Booking ID of individual bookings appears in a number of locations:

- On each activity's **Details** pane in the Activity stream.
- On the Scheduling confirmation page.
- On calendar events.
- In all email notifications that use Default templates.

The Booking ID is also available as a dynamic field which can be added to OnceHub Detail reports, as well as to our custom notification templates.

If you use Session packages, every package has its own unique Session package ID. Each session within the package also has its own Booking ID. The Booking ID for each session can be found in the specific session's **Details** pane in the Activity stream and in the calendar event (Figure 2 above).

Session package ID

Session packages have a unique Package ID. Unlike Booking IDs, which are used as unique identifiers of individual sessions, Session package IDs identify the entire package. Session package IDs can be differentiated from Booking IDs by the inclusion of the prefix "PKG" before every code rather than BKNG; for example, Session package ID: PKG-UTKFVR26JN

The Session package ID appears in a number of locations:

- In the footer of the **Details** pane in the Activity stream.
- On the Scheduling confirmation page.
- In all email notifications that use the Default templates.

The Session package ID is also available as a dynamic field which can be added to OnceHub detail reports as well as to our custom notification templates.

Transaction ID

Transactions are identified by a unique Transaction ID with the TXN prefix; for example, Transaction ID: TXN-1234DF56

The Transaction ID can be found in the footer of the **Details** pane in the Activity stream. It's also available as a dynamic field that can be added to custom notification templates.

Tracking and reporting No-shows

If your customer didn't show up to a meeting, you may want to keep track of this. This can be done by changing the booking status to **No-show**. Regardless of whether the booking status is **Scheduled**, **Rescheduled**, or **Completed**, you can change it to **No-show**.

The **No-show** status is included in all reports and is part of the activity lifecycle process.

How to change the status to No-show

1. Select the activity in the Activity stream.
2. In the **Details** pane, select **Set to No-show** (Figure 1).

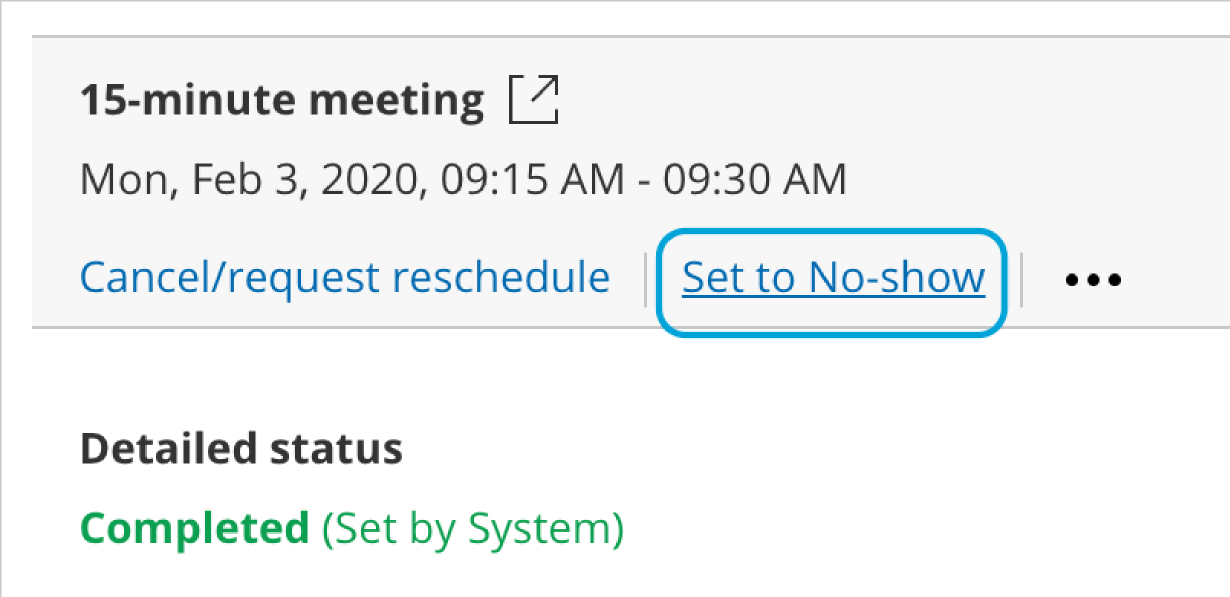

Figure 1: Set to No-show

3. The **No-show status** pop-up will appear.
4. Click **Yes** to set the status to **No-show**.

> **Note:**
>
> You cannot change the status back to **Completed**, so please be sure you want to mark it as **No-show** for your reports.

Where do you track the No-show status?

You can track the **No-show** status of an activity in all OnceHub reports. The status is added to the summary and detail reports, making it possible to see the number of No-shows and their details according to all reporting dimensions.

What happens when an activity status is set to No-show?

When you set up OnceHub to send a follow-up email to customers, you can define when they will receive the email notification. If you changed the status of the activity to **No-show** before the follow-up email event is triggered, the follow-up email will not be sent.

Scheduling on behalf of the customer

If your existing workflow involves making a preliminary phone call with prospects or customers, you can use OnceHub to schedule the session on behalf of your customer.

On the call, you can ask your customer for their preferred time and then use the OnceHub Find by time feature to identify the most appropriate Team member and schedule the meeting.

Using the Salesforce scheduling button

The simplest way to schedule OnceHub bookings on behalf of customers is with our Salesforce scheduling button.

Our Salesforce integration allows you to add a Schedule button to all CRM contacts. When you click the button, OnceHub uses the contact's record to identify the customer, so you don't need to fill in the customer's information. The booking form is skipped, and all you have to do is select a time and a Team member to finalize the appointment.

The booking is then automatically created in all parties' calendars and added to the Contact's CRM record. Learn more about Salesforce Scheduling buttons for contacts, leads and cases

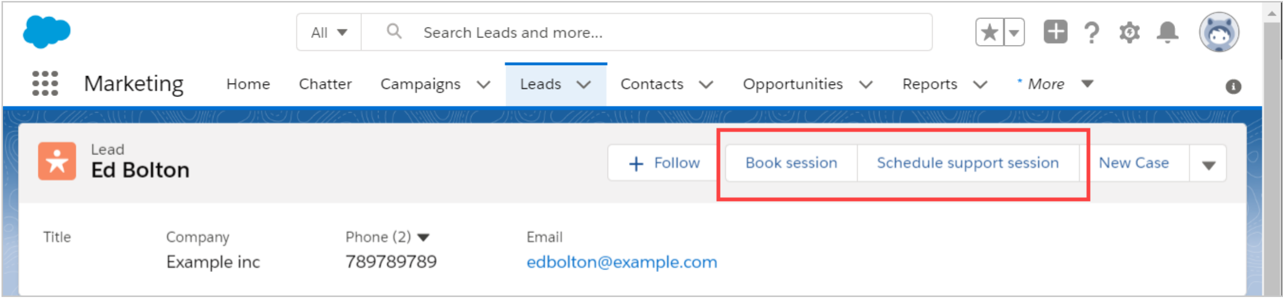

Figure 1: Salesforce scheduling buttons

Manually filling out the booking form

Alternatively, you can manually fill out the Booking form as though you were the customer.

In the booking form, enter the customer's details in the booking form fields. For example, enter the customer's name in the **Your name** field. Then, select a time that works best for your customer, based on the times shown on the relevant booking page.

When you use this method to schedule on behalf of a customer, you do not need to have a user license. The OnceHub administrator, who does have a user license, simply needs to send you or whoever is scheduling the meeting the link for the relevant booking page or Master page configured in the account.

For example, John works in an organization in which the onboarding process requires a preliminary phone call with the customer. John has been assigned to Annette, who is a new customer. John calls Annette and asks her for her preferred time. She asks for 3:30 PM on Tuesday, June 6th and he confirms this time is available. He selects this time, and then asks her to provide the relevant information. John then enters this information on the booking form.

After he clicks **Done**, the appointment is set. Annette will receive confirmation by email and/or SMS of her booking. The person providing the meeting (someone different from John) is a user in the OnceHub account and will also receive notifications.

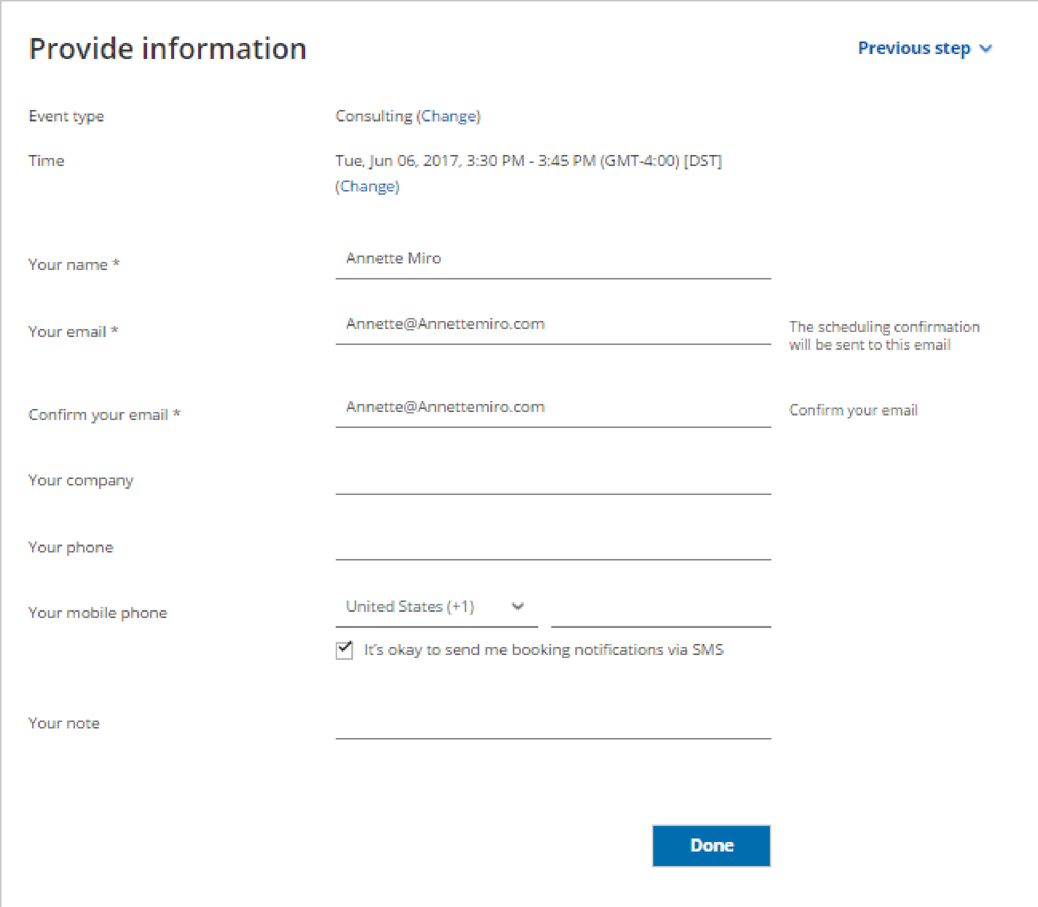

Figure 2: Booking form

Mobile admin interface

Important:

This article is only relevant for users who created their account **before March 2nd 2019**. The Mobile admin interface is not available to users who created accounts after this date.

The Mobile admin interface is available to OnceHub users who created their account before March 2nd 2019, allowing you to manage appointments and approve booking requests through your mobile device.

How do I access the mobile admin interface?

To sign in, go to oncehub.com from your mobile device and sign in to your account.

Which mobile devices are supported?

The mobile admin interface runs on all major browsers and mobile platforms. Since it is a browser application, no download or installation is required. The mobile interface is optimized for both mobile phones and tablets.

The mobile admin interface supports mobile phones and tablets running Android and iOS.

What actions can you perform?

The mobile admin interface allows you to manage appointments and approve booking requests through your mobile device. You can perform the following actions:

1. View the booking details and Payment details of individual bookings in the Activity stream tab.
2. View the booking details and Payment details of Session packages in the Packages tab.
3. Approve booking requests.
4. Reschedule a booking.
5. Cancel a booking.
6. Set a booking to No-show status.
7. Manually process refunds.
8. Share your booking page links.

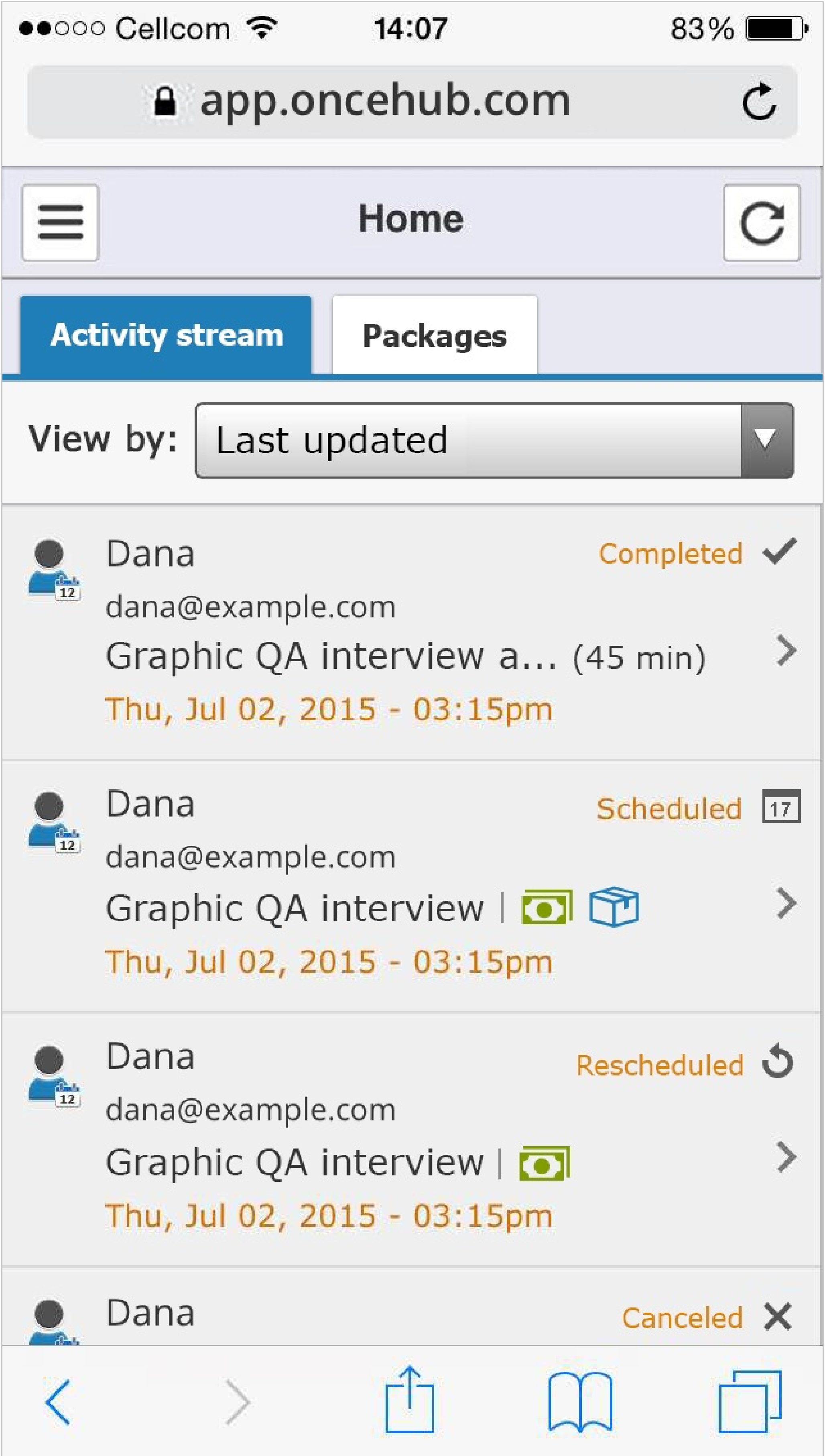

Figure 1: The mobile admin interface for smartphones

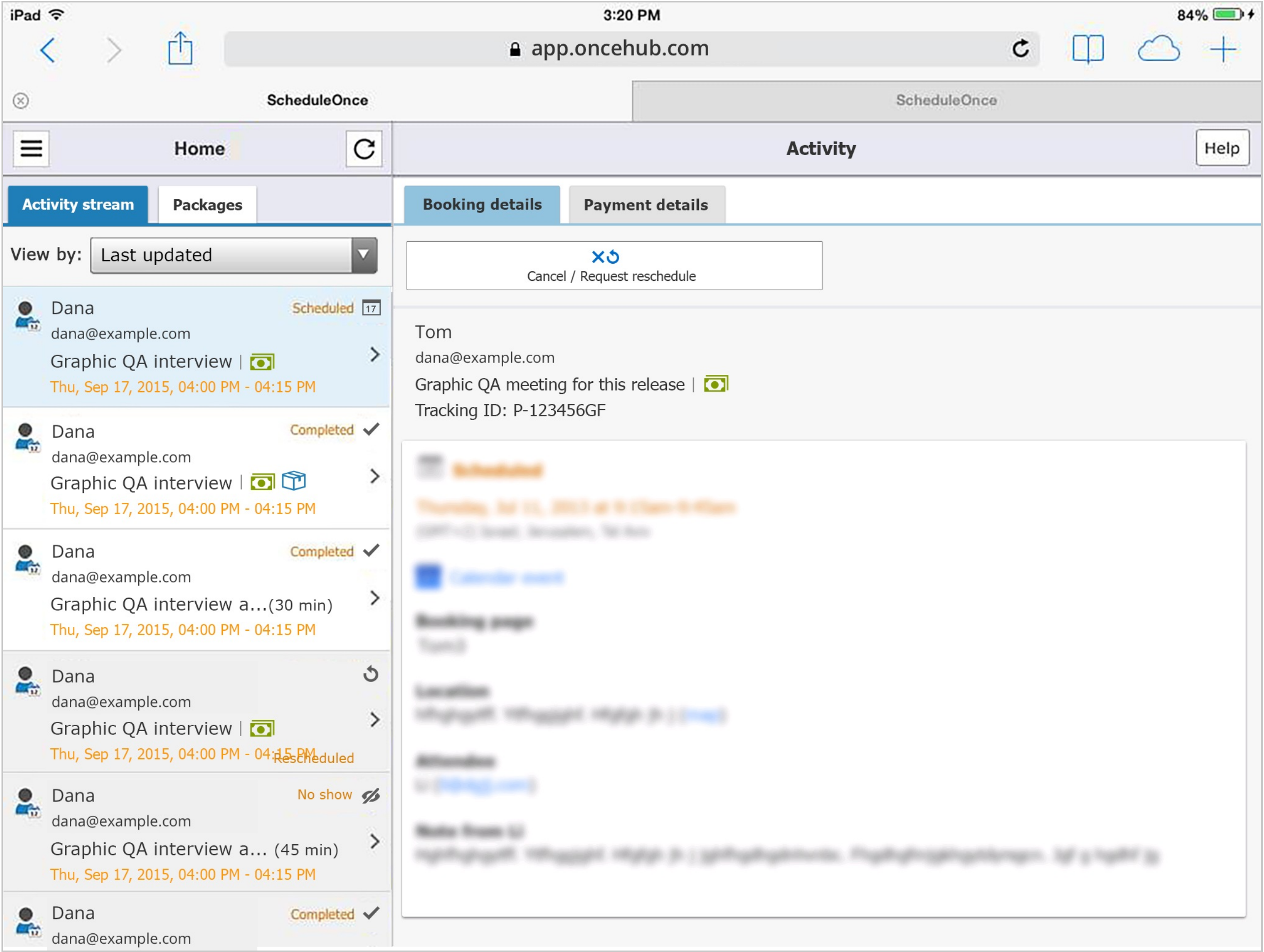

Figure 2: The Mobile admin interface for tablets

Deleting activities from the Activity stream

Stay compliant with data privacy law by managing data deletion requests from your customers. When you delete selected activities in the Activity stream and move these activities to the Trash, they will be deleted permanently after 30 days.

You do not need an assigned product license to access the Activity stream and move activities to the Trash, but you do need to be an administrator. Learn more

Read on to learn about moving activities to Trash, restoring activities, deleting them permanently, and other related changes to your account after deleting activities.

> **Note:**
>
> Deleting activities is a new feature being rolled out gradually. If you do not see this option in your Activity stream and it's necessary for your account management, please contact us and we'd be happy to turn it on for you.

Move activities to Trash

If you'd like to move an activity to the Trash, select the relevant activity in the Activity stream. You will see a menu of three dots. Click on this and select **Move to Trash**. In the pop-up, confirm you want to move it to the Trash.

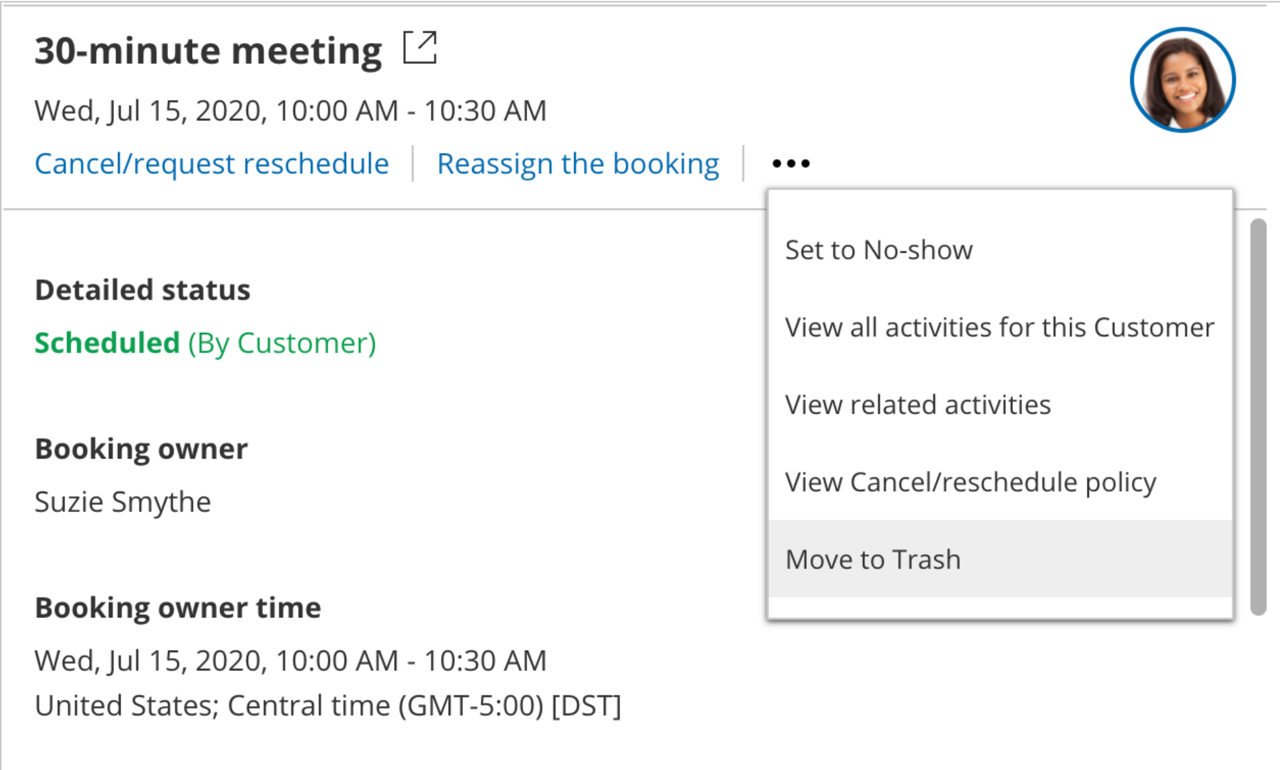

Figure 1: Move to Trash

You will no longer see this activity in your Activity stream, either from default or custom filters. You can only access this activity from the Trash filter, for the next 30 days after moving it to the Trash.

Members, booking page owners, editors, and customers **will not** be notified when their activities are deleted.

Note:

Moving activities to the Trash for permanent deletion is a feature intended for data deletion, to comply with privacy laws.

It is **not intended** for booking cancellation. Deleting an activity does not cancel a future booking. If you move an activity to Trash and permanently delete it, **this does not update any related calendar event in your connected calendar, nor will that time be free for other meetings**.

If you'd like to cancel the meeting, you can do this through the standard cancellation process, which will both cancel the meeting and free that time slot for other meetings.

Bulk deleting activities

You can delete up to 50 activities at one time by selecting each in the activity stream. Click on the Trash icon and you'll be able to delete them all at once, after confirming you want to delete that number of activities.

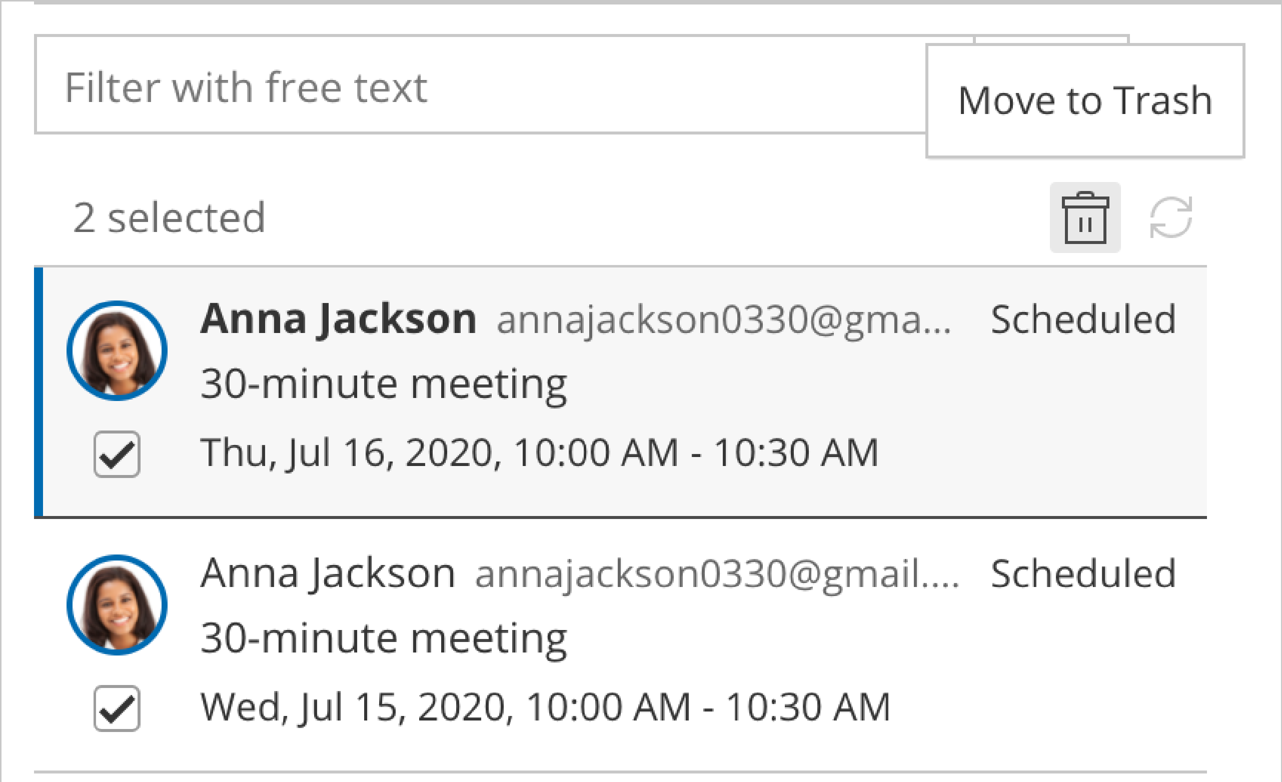

Figure 2: Select multiple activities for moving to trash

The Trash

The Trash holds all deleted activities from the last 30 days.

Only admins can see the Trash. Member users will not be able to see the activities in the Trash.

Restoring activities from Trash

If you sent an activity to the Trash in error, you can restore this activity within 30 days of moving it to the Trash. Find and select that activity in the Trash. Hover over the menu of three dots and select **Restore activity**. The activity will now appear in your active Activity stream filters and will not be deleted permanently.

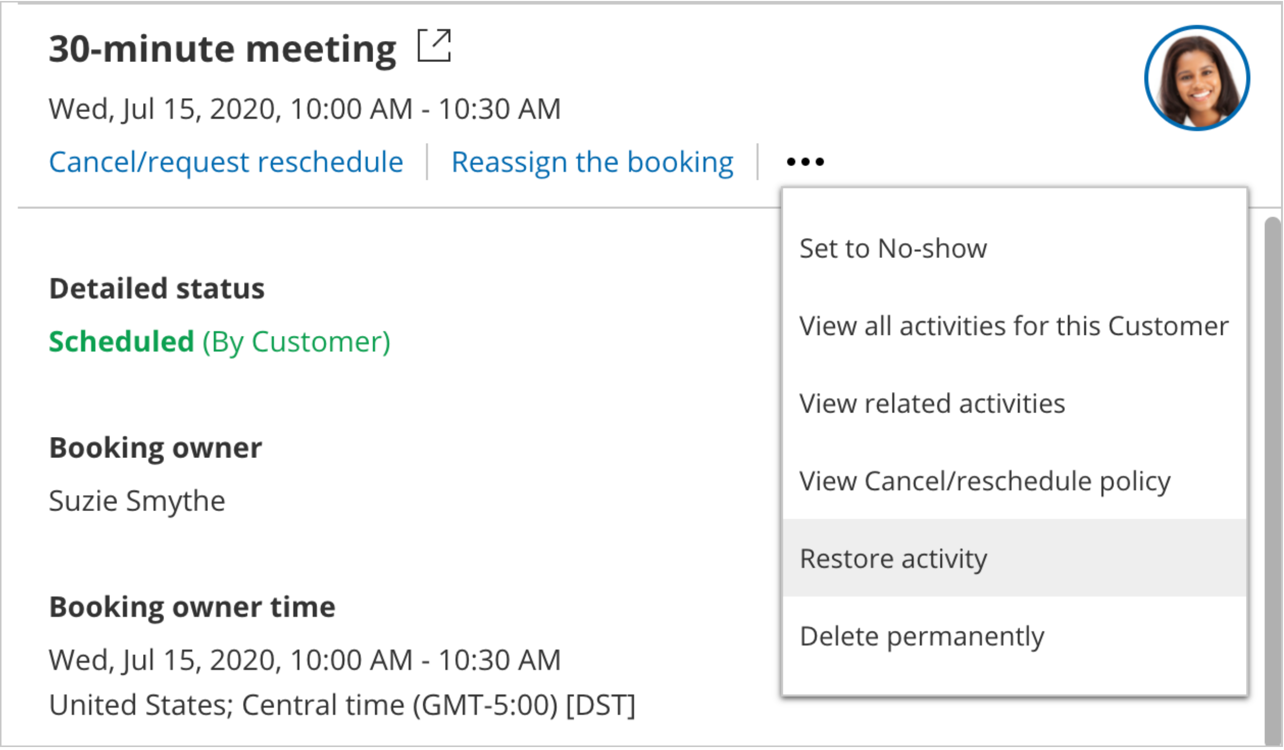

Figure 3: Restore activity

Deleting activities permanently

All activities sent to the Trash delete permanently and automatically after 30 days.

If you wish to delete the activity permanently before 30 days, go to the menu of three dots and select Delete permanently.

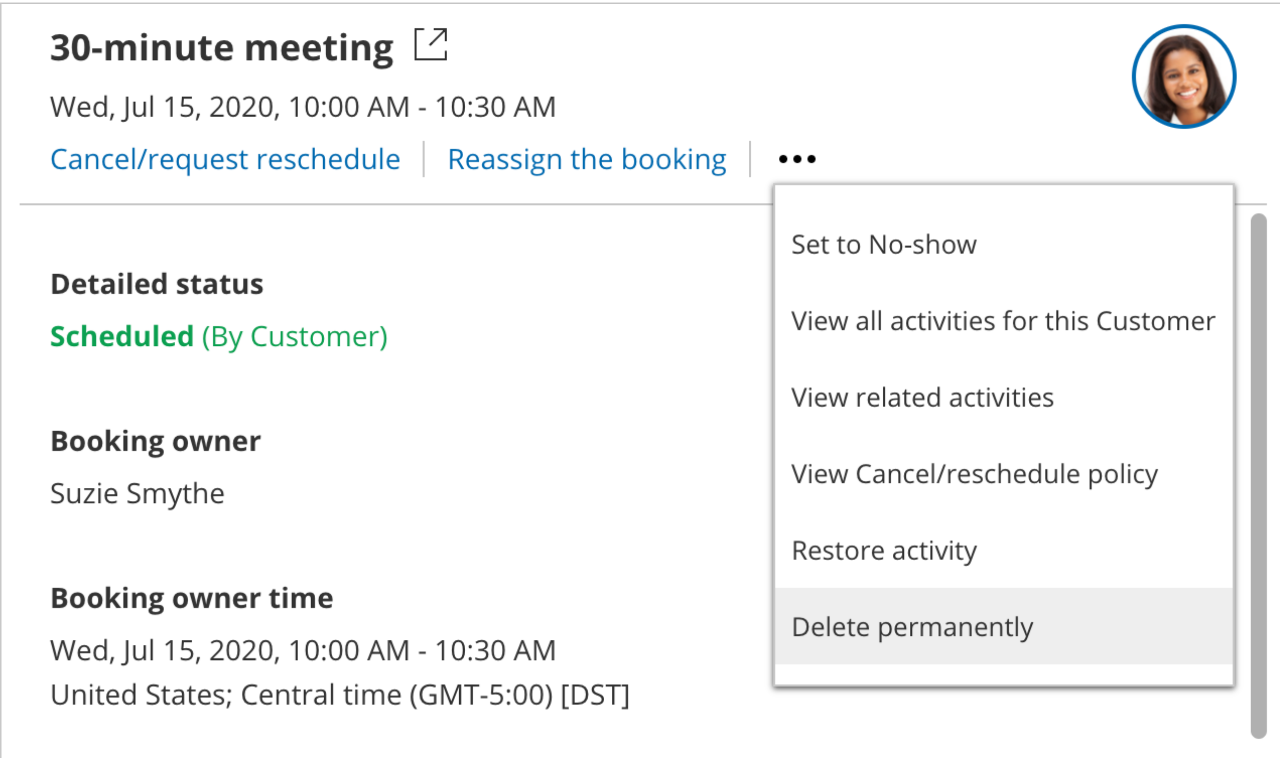

Figure 4: Delete permanently

The permanently deleted data will also be removed from OnceHub's servers within 24 hours of permanent deletion in your account.

If you move something to the Trash on January 1 and don't choose to delete it permanently yourself from the Trash, it will be deleted permanently from your account on January 31. At this time, it will be flagged for deletion from the OnceHub database, which can take up to 24 hours. This data will be completely removed from OnceHub's servers by end of day on February 1.

If you choose to delete it permanently from the Trash before 30 days are complete, it will be removed within 24 hours. This means if you move something to the Trash on January 1 and choose to delete it permanently on January 1, this data will be completely removed from OnceHub's servers by end of day on January 2.

If you'd like to delete all activities permanently, you can select **Empty trash now** in the banner at the top of Trash. This will permanently delete all activities in the Trash.

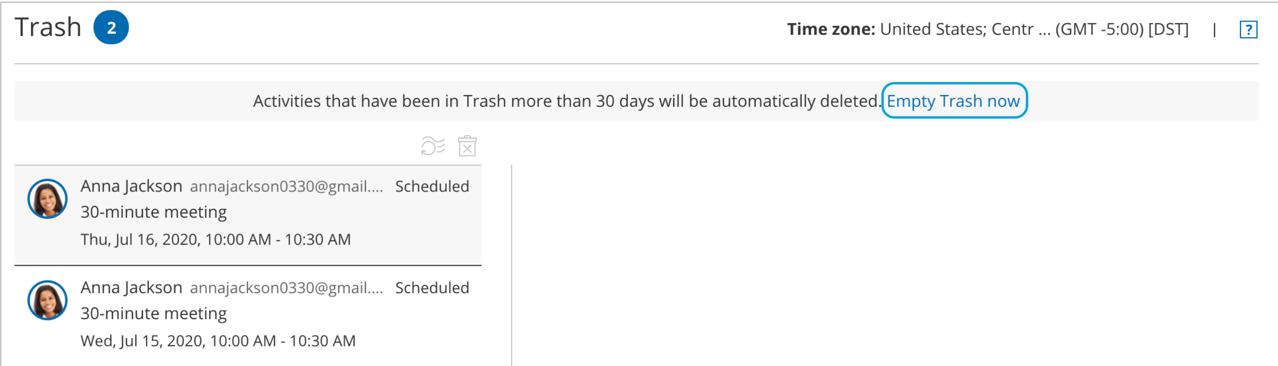

Figure 5: Empty trash now to remove all items in the Trash

Permanently deleted activities **cannot** be restored by any account admin, nor by OnceHub database engineers. This keeps deleted activities compliant with privacy laws.

Deleted activities in reports

Activities in the Trash remain active and will be included in reports until deleted. They will display as being **(In Trash)**.

Subject	Status	Last updated
Booking request	Expired (In Trash)	Fri, Jun 12, 2020, 12:10 PM
Booking request	Completed (In Trash)	Fri, Jun 12, 2020, 12:40 PM
Booking request	Completed (In Trash)	Fri, Jun 12, 2020, 02:40 PM
Booking request	Completed (In Trash)	Fri, Jun 12, 2020, 03:10 PM
Booking request	No-show (In Trash)	Fri, Jun 12, 2020, 02:52 PM

Figure 6: Status displays that the activity is in the Trash

After they are permanently deleted, any fields related to this deleted activity will not show up in reports.

For permanently deleted payment activities, the payment will still be listed as an item on your revenue reports but will not include any personal identifying information for that payment.

Session packages

If you delete a single session in a session package, this deletes only that single session. The session package is otherwise not affected. The reverse is also true: If you delete a session package, the individual sessions in that package will remain active.

If you'd like all sessions in a session package to be deleted, you must delete each individually. We recommend using the bulk select and delete option (see above, **Bulk deleting activities**).

Payment integration

When you delete a payment activity, the following will be removed from its related activity/activities in the Activity stream:

- Option to **Process a refund**
- Option to **Download invoice**
- The relevant booking page
- Ability to **View Cancel/reschedule policy** in the menu with three dots

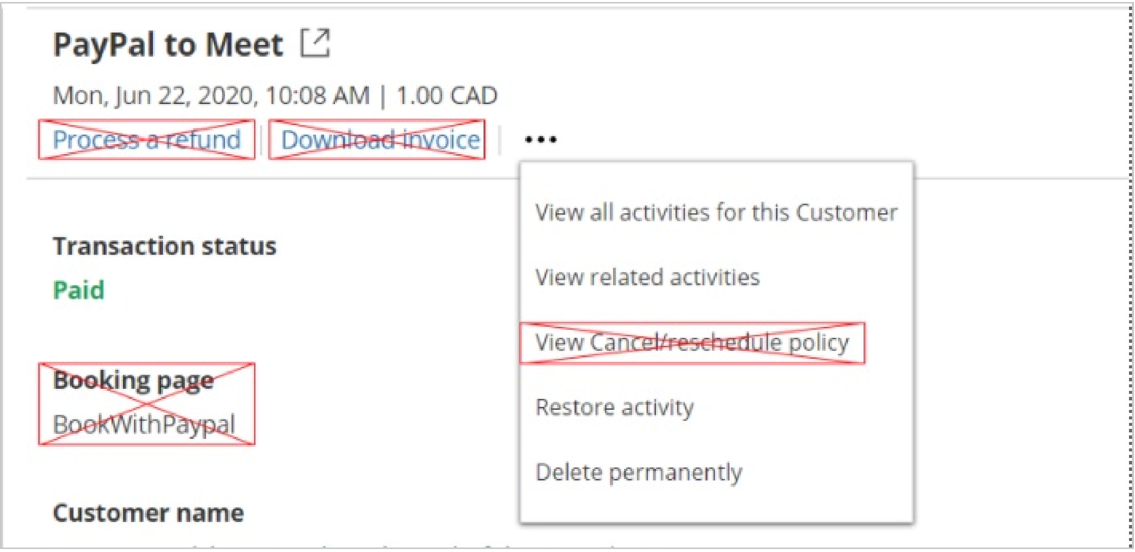

Figure 7: Removed fields with deleted payment activity

The payment will still be listed as an item on your revenue reports but will not include any personal identifying information for that payment.

Third-party integrations

It's important to understand that data from the deleted activities will **only** be removed from OnceHub. Users will need to follow similar deletion protocols in each integrated application that may be connected to OnceHub. When you delete an activity, OnceHub will not remove data related to that deleted activity from your calendar, CRM, video conferencing app, or any other integrated system.

Introduction to billing

Last Modified on Apr 7, 2024

OnceHub seats can be purchased with a monthly or annual subscription, which is always billed in advance.

Seats are used to grant users access to varying functions within OnceHub. You can purchase seats for scheduled meetings or live engagements.

Read on to learn more about how billing for your OnceHub seats work.

Adding and managing seats

Accessing the Billing section

In the top navigation menu, select the gear icon → **Billing**. You must be an administrator to initiate any OnceHub transactions.

OnceHub seats can be purchased with a monthly or annual subscription. When you purchase a seat for the first time, you are immediately billed in advance for the first billing cycle.

- **Monthly subscription:** On each monthly billing date, you'll be charged for the upcoming month's subscription, based on the exact number of user seats in your account.
- **Annual subscription:** On each annual billing date, you'll be charged for the upcoming year's subscription, based on the exact number of user seats in your account.

Adding seats

You can add seats for scheduled meetings or live engagements (live chat, instant calls) at any time. When you add seats, you can determine which users should be assigned seats in your account.

When you add seats during your billing cycle, you'll pay a prorated adjustment for them.

Adding seats to a Monthly subscription

When you add seats to a monthly subscription, you'll only pay for them on your next billing date.

On your next billing date, you'll pay:

- A prorated adjustment for the seats added during the current billing cycle.
- The full amount for the total number of seats in your account for the upcoming month.

Adding seats to an annual subscription

When you add seats to an annual subscription, you'll immediately pay a prorated adjustment for them. On the next billing date, you'll pay:

- The full amount for the total number of seats in your account for the upcoming year.

Removing seats and pausing your subscription

You can remove seats at any time. When you remove seats, they are still available for use in the application until the end of your current billing cycle. This is because you've already paid for all of your seats in advance at the beginning of the current billing cycle.

If you remove all of your seats, you will pause your subscription. This will limit your access to OnceHub functionality. You can resume your subscription and access at any times by adding seats.

Purchasing your first OnceHub product

OnceHub seats can be purchased with a monthly or annual subscription.

To purchase a OnceHub seat, you must be a OnceHub Administrator.

Purchasing a monthly or annual subscription

You can purchase OnceHub seats in your OnceHub account by selecting the gear icon in the top navigation menu → **Billing** → **Seats**.

When you purchase seats for the first time, you are immediately billed in advance for the first billing cycle and an invoice is sent to you. All future recurring payments are charged to your primary payment method.

If your primary payment method doesn't work on your billing date, your secondary payment method will be charged instead. We recommend always having a secondary payment method, to prevent loss of account functionality.

Monthly billing will be selected as the **default subscription**. You can change to an **annual subscription** if you prefer.

Important:

Once you've completed your first purchase, you won't be able to change your billing cycle. If you've already purchased a subscription and would like to change your billing cycle, please contact us.

Monthly subscription

- On each monthly billing date, you'll be billed in advance for the upcoming month.
- You can add or remove seats at any time.
- When you add seats, you'll pay a prorated adjustment for them on the next billing date.

Annual subscription

- On each annual billing date, you'll be billed in advance for the upcoming year.
- You can add or remove seats at any time.
- When you add seats, you'll immediately be charged a prorated adjustment for them.

Note:

The billing date and time for your recurring payment cycle is the exact date and time that you purchase your subscription on. All billing dates and times are based on UTC (Coordinated Universal Time).

For example, if you purchase a monthly subscription at 10:00 am UTC on September 2, your first payment will be made that same day. After that, your monthly recurring payments will be billed on the 2nd day of every month at

10:00 am UTC.

How to purchase a OnceHub seats for the first time

1. Click the **Purchase now** button next to the product you'd like to purchase.

2. In the **Secure checkout** page, add as many seats as your organization requires.

3. The **Order summary** will be updated based on the number of user seats you purchase.

4. The default billing cycle is **Monthly**. If you want to use an annual billing cycle, in the **Order summary** section click **Switch to annual** (Figure 4).

5. Click **Proceed to payment**.

6. On the **Secure payment** page, select your **Payment method**. You can pay using a credit card or a PayPal account.

- **Credit card:** Enter your payment details and click **Submit payment** to complete the purchase.
- **PayPal:** Click the **Pay with PayPal** button. You'll be prompted to log in to your PayPal account and choose a way to pay. Click **Agree & Continue** to create a Billing Agreement and complete the purchase.

Once your purchase is complete:

- You'll immediately be able to assign the seats you have just purchased.
- You'll receive an Order confirmation email with your invoice attached.
- The date and time of your purchase will be the billing date and time for your recurring billing cycle.
- The transaction will be recorded in the **Billing → Transactions** tab.
- The payment method you used to make the purchase will be stored as your primary payment method. This payment method will be used for all future recurring payments. You can change the primary payment method at any time.
- We always recommend you add a secondary payment method, which is charged automatically if your primary payment method doesn't work on your billing date. This ensures your account stays active, without a pause in services.

In order for a user to enjoy full functionality of OnceHub, they must be assigned a seat. For instance, a seat is required to receive scheduled meetings.

Please note they can still use all other functionality in OnceHub and within all products without a seat.

Does my User need an assigned seat?

You can add seats or remove seats during your billing cycle on an as-needed basis.

Tax-exempt status

If your organization is tax-exempt, please reach out to us at **tax@oncehub.com**, including:

1. The email associated with your OnceHub account
2. Your tax-exempt certificate

Buyer details on invoice

You can edit the buyer details that will appear on invoices before you make your first purchase. To edit the buyer details on invoices, in the left navigation bar select **Billing → Transactions**. Then, click the action menu (three dots) next to the **Transactions** heading. Then, select **Buyer details on invoice**.

How to change your billing cycle

All OnceHub payments are recurring.

Your account can be billed on a monthly basis or annually. When you purchase OnceHub for the first time, you will choose your preferred billing cycle. When the annual billing cycle is selected, you get a 10% discount.

How to change your billing cycle

1. Select the gear icon in the top navigation menu → **Billing**.
2. On the right hand side, next to your billing cycle, select to switch your cycle.
3. You will see a popup. Follow the directions to apply the changes to your account.

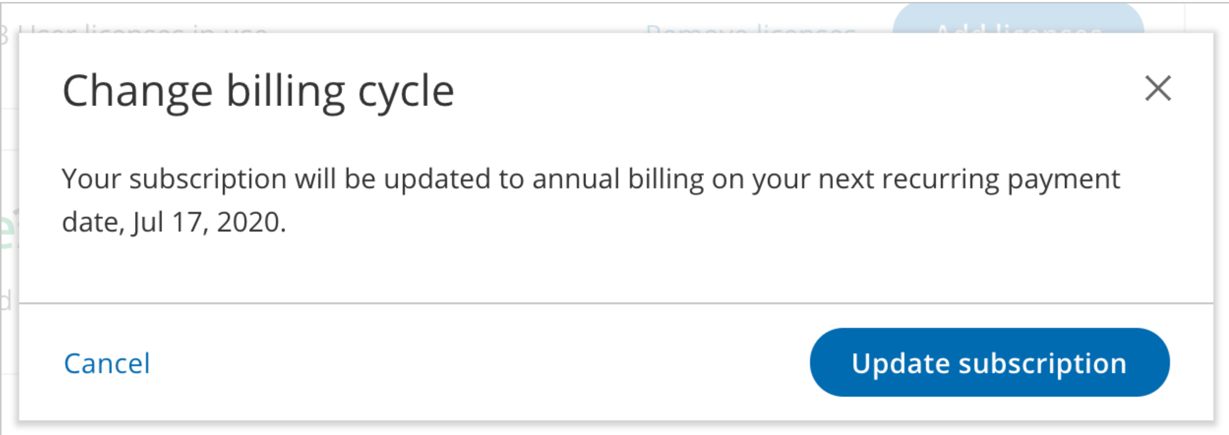

Figure 1: Change billing cycle popup - This example changes the cycle from monthly to annual

How does it work?

1. Changing monthly to annual billing

- When you change to an annual billing cycle, the annual cycle will start only when the current monthly cycle ends and will renew on a yearly basis thereafter. Your account will be charged for the next annual cycle on your next scheduled billing date.
- For example, let's assume that you currently pay $36 for three seats on a monthly basis. You pay on the 1st of each month and your next scheduled billing date is October 1. Today is September 15 and you decide to change your billing cycle to annual billing. You can change your billing cycle to annual billing today in your account and you are not charged. On October 1, your next scheduled billing date, you will be charged $324 for three seats on an annual basis (10% off for annual commitment). Subsequently, you will be charged $324 on October 1 of each year.
- You can revert back to the original billing cycle any time before the new billing cycle is processed on your next scheduled billing date (in the above example, any time between September 15 - October 1).
- If you add seats to your subscription **after** changing your billing cycle but **before**your next scheduled billing date:

- The prorated cost, based on your **current billing cycle,** will be added to your next invoice and charged on the scheduled billing date (in the above example, on October 1).

2. Changing annual to monthly billing

- When you change to a monthly billing cycle, the monthly cycle will start only when the current annual cycle ends and will renew on a monthly basis thereafter. Your account will be charged for the next monthly cycle on your next scheduled billing date.
- For example, let's assume that you currently pay $324 for three seats on an annual basis (twelve months plus 10% off for annual commitment). You pay on December 1 of each year. Today is September 15 and you decide to change your billing cycle to monthly billing. You change your billing cycle to monthly billing today in your account and you are not charged. On December 1, your next scheduled billing date, you will be charged $36 for three seats on a monthly basis. Subsequently, you will be charged $36 on the 1st of each month.
- You can revert back to the original billing cycle any time before the new billing cycle is processed on your next scheduled billing date (in the above example, any time between September 15 - December 1).
- If you add seats to your subscription **after** changing your billing cycle but **before**your next scheduled billing date:
    - The prorated cost will be charged on the day you add the seats (in the above example, on September 15). The charge is based on the **current annual billing cycle**, and **not** the monthly billing cycle starting on your next scheduled billing date.

Purchasing and managing SMS credits

SMS notifications are purchased in packages of credits. You can purchase SMS credits in your OnceHub Account in the **Billing→ Seats** section. Once you've purchased SMS credits, they are immediately available for use by every user with a user seat. SMS credits are deducted per SMS notification sent.

How do SMS credits work?

- SMS credits can be purchased at any time. You pay for SMS credits as you purchase them.
- Once you've purchased SMS credits, they are immediately available for use by every user with a user seat.
- SMS credits are deducted per SMS notification sent.
- SMS pricing is the same for every mobile number globally. We do not charge different prices or deduct more credits based on the destination.
- When you start a OnceHub account, you'll receive 25 free SMS credits to test out this feature. If you run out of credits, you can purchase additional SMS credits in the **Billing→ Seats** section..

SMS Pricing

SMS credits are purchased in packages. Every standard SMS sent requires one SMS credit. A standard SMS is one that is 160 characters or less in length.

SMS credits	Cost	Cost per SMS credit

100	USD 15.00	USD 0.15
200	USD 25.00	USD 0.125
500	USD 50.00	USD 0.10
1000	USD 90.00	USD 0.09
2000 or more	TBD	USD 0.08

Purchasing SMS credits

1. Select the gear icon in the top navigation menu → **Billing→ Seats**.
2. Click the **Add credits** button (Figure 1).

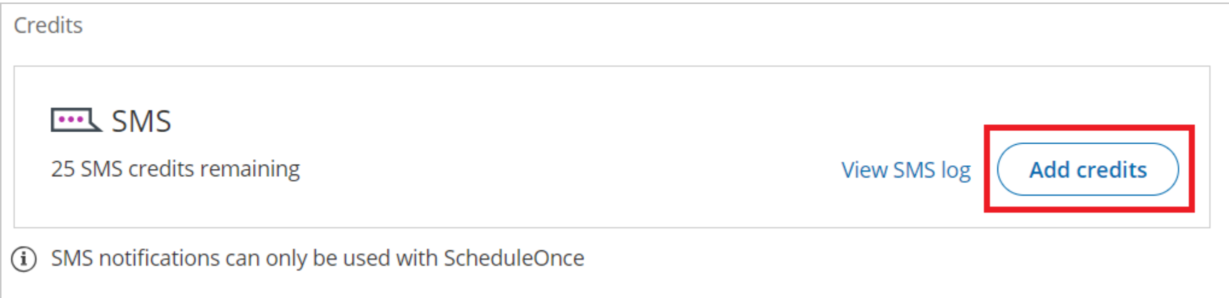

Figure 1: Add SMS credits

3. In the **Secure checkout** page, select the quantity of SMS credits you would like to purchase.
4. Click **Proceed to payment**.
5. Select a payment method. You can choose from payment methods that are already on file or click **use a new payment method** to add and pay with a new payment method. By default, the payment is charged to your primary payment method.
6. Click **Submit payment**.

- Your SMS credits are immediately available for use by any user in your account with a user seat.
- The transaction is recorded in the **Billing → Transactions** tab.
- You will receive an Order confirmation email with your invoice attached.

Understanding the SMS balance

To view your SMS balance, select the gear icon in the top navigation menu → **Billing→ Seats**. Your SMS balance is displayed in the SMS box (Figure 2).

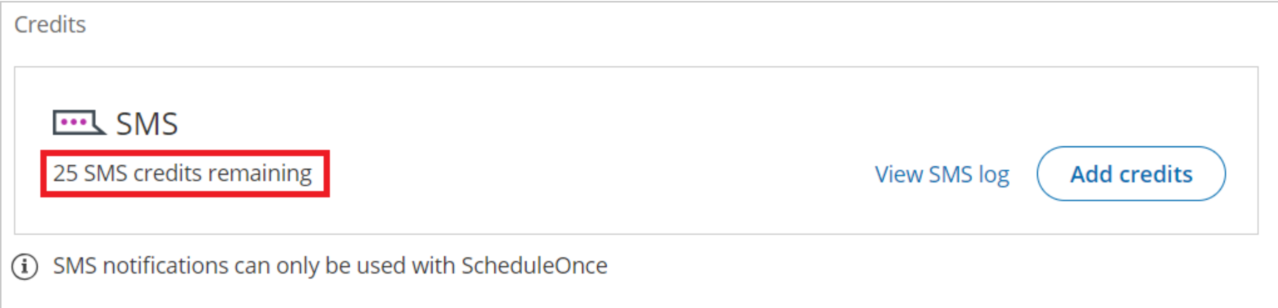

Figure 2: SMS credits remaining

- Every standard SMS sent deducts one SMS credit from the SMS balance. A standard SMS is one that is 160 characters or less in length. SMS notifications that are longer require additional SMS credits.
- SMS credits are charged per SMS notifications sent, not delivered. OnceHub uses a robust stable network with a very high delivery success rate.
- OnceHub Administrators will receive an alert via the Notification center and via email when the SMS balance reaches 25% of the last SMS credits purchase and when the balance reaches zero.

For more information on how to monitor your account's SMS usage, see our SMS log data article.

Tracking SMS usage

The **SMS log** section is where you track SMS notifications sent through your account. Data is recorded for all SMS notifications sent in the following scenarios:

- Customer notifications
- User notifications

You can filter the records by date range or phone number. You can also export them to a spreadsheet.

Accessing your SMS log

1. Select the gear icon in the top navigation menu → **Billing→ Seats** .
2. Then, click **View SMS log** (Figure 1).

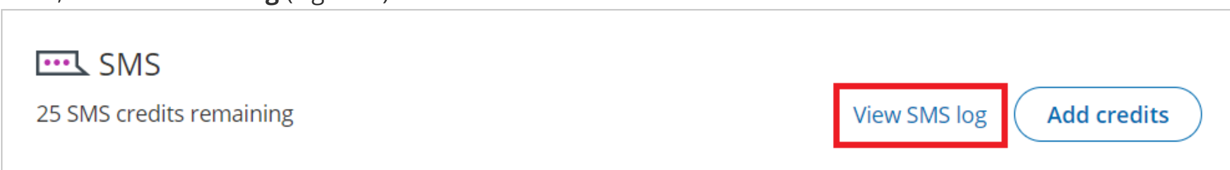

Figure 1: View SMS log

SMS log

The records in the SMS log contain the following information:

Date: The day the SMS was sent.

Booking page: The Booking page associated with the SMS. Test SMS notifications do not have Booking pages associated with them.

To: The number that the SMS was sent to.

Recipient: The name of the Customer or User that the SMS was sent to.

Template: The name of the template that was used to send the SMS.

Characters: The number of characters used in the SMS, including spaces.

SMS credits: The number of SMS credits used.

Status: One of the following delivery statuses will be displayed.

- **Delivered**: The SMS was sent and arrival was confirmed via delivery receipt.
- **Sent:** SMS was sent but a delivery receipt was not received.
- **Rejected:** The phone number was found to be invalid prior to sending.
- **Failed:** The SMS failed to send.

Payment and billing

Last Modified on Aug 6, 2024

The Billing section stores your primary payment method and secondary payment methods.

- OnceHub supports debit cards, credit cards, and PayPal.
- The primary payment method is automatically used for all your transactions.
- You can also store secondary payment methods in your account. These are used if your primary payment method fails. Storing secondary payment methods allows you to conveniently switch payment methods when you make a purchase. It also ensure that your account stays active when there's an issue with your primary payment method by automatically charging the secondary method.

Managing payment methods

Primary payment methods and secondary payment methods are stored in your OnceHub Account in the **Billing → Payment methods** section. You can add or remove payment methods at any time. You can also change the primary payment method as needed.

Read on to learn about managing payment methods in your OnceHub Account.

Requirements

To manage payment methods, you must be a OnceHub Administrator.

OnceHub supports all major credit cards and debit cards. Supported cards include Visa, Mastercard, American Express, Discover, and JCB. OnceHub also supports PayPal.

Primary payment method

When you purchase a product for the first time, the payment method you use is stored as the primary payment method in the **Billing → Payment methods** section of your OnceHub Account. You can only have one primary payment method at a time.

You can also add an additional payment method and then set it as your primary payment method in the **Billing → Payment methods** section.

Secondary payment methods

Secondary payment methods are stored in your OnceHub Account and are only used automatically as a backup method when your primary payment method doesn't work.

Storing secondary payment methods allows you to switch payment methods when making one-off purchases, resume payment after a failed recurring payment, or change the payment method used for recurring payments. You can store as many additional payment methods in your OnceHub Account as you need.

Adding a payment method in the Payment methods section

If you've already purchased a OnceHub product subscription, you can add a payment method at any time.

1. Sign in to your OnceHub Account.
2. Select the gear icon in the top navigation menu → **Billing** → **Payment methods**.

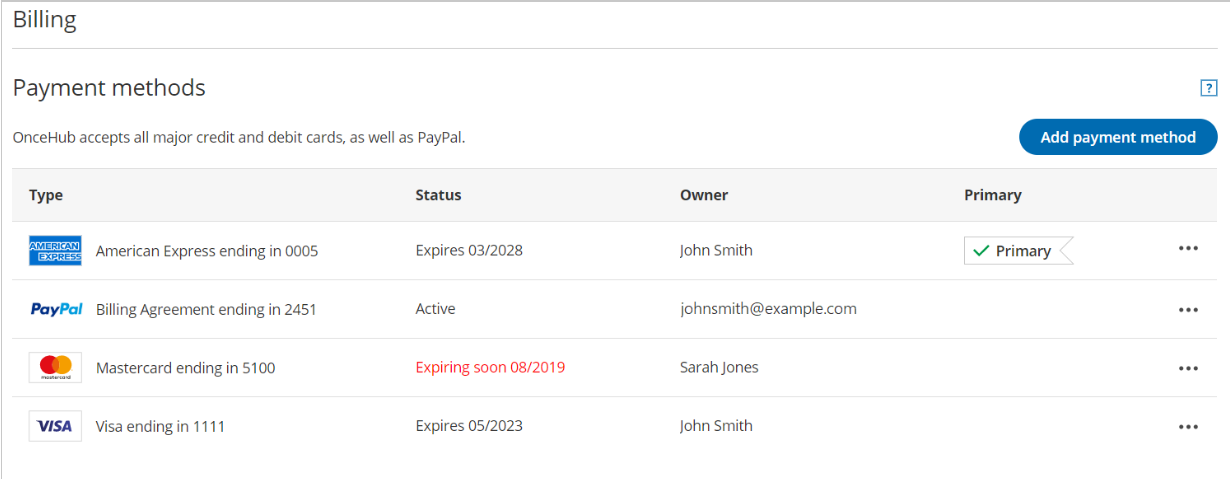

Figure 1: Payment methods section

3. Click the **Add payment method** button.
4. The **Add payment method** pop-up will appear.

You can now decide if you want to add a credit card or a PayPal account.

Adding a credit card

Supported cards

OnceHub supports all major credit cards and debit cards. Supported cards include Visa, Mastercard, American Express, Discover, and JCB.

Primary payment methods and additional payment methods are stored in your OnceHub Account in the **Billing → Payment methods** section. You can add or remove payment methods at any time. You can also change the primary payment method as needed.

You can only add a credit card as a payment method after your first purchase. In the case of a credit card nearing its expiration date, simply add your new card as the primary payment method. Learn how to add a credit card in **Billing → Payment methods**.

Compliance

OnceHub is a PCI DSS level 1 service provider. Our payment security is paramount, and has achieved certified compliance against all PCI DSS version 3.2 requirements. OnceHub strictly adheres to these standards to safeguard your payment data before, during and after purchase. Our ongoing commitment to payment protection includes regular validation by an independent PCI Qualified Security Assessor (QSA). You can rest assured, your organization's payment information is protected by the global standard in payment card security.

For more information, visit our Trust Center.

1. In the **Payment method** section, select **Credit card** (Figure 2).

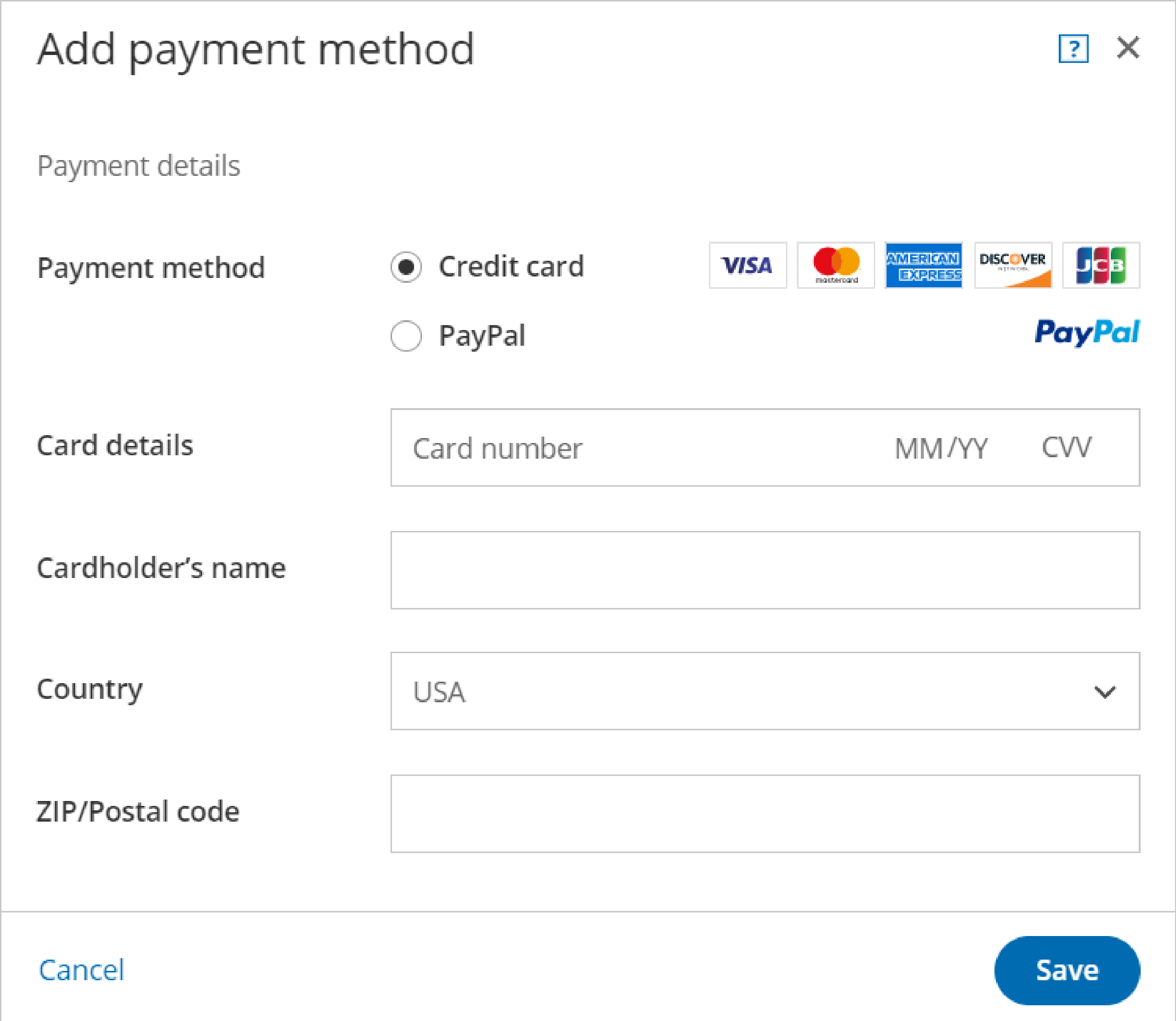

Figure 2: Selecting credit card as the payment method

2. Enter your card information.

3. Click **Add payment method**.

The credit card is added to your OnceHub Account as an additional payment method.

Adding a PayPal Account

The Billing Agreement is an agreement between you and OnceHub which allows OnceHub to automatically charge your PayPal account for purchases made in your OnceHub Account. The Billing Agreement is handled entirely by PayPal.

1. In the **Payment method** section, select **PayPal** (Figure 3).

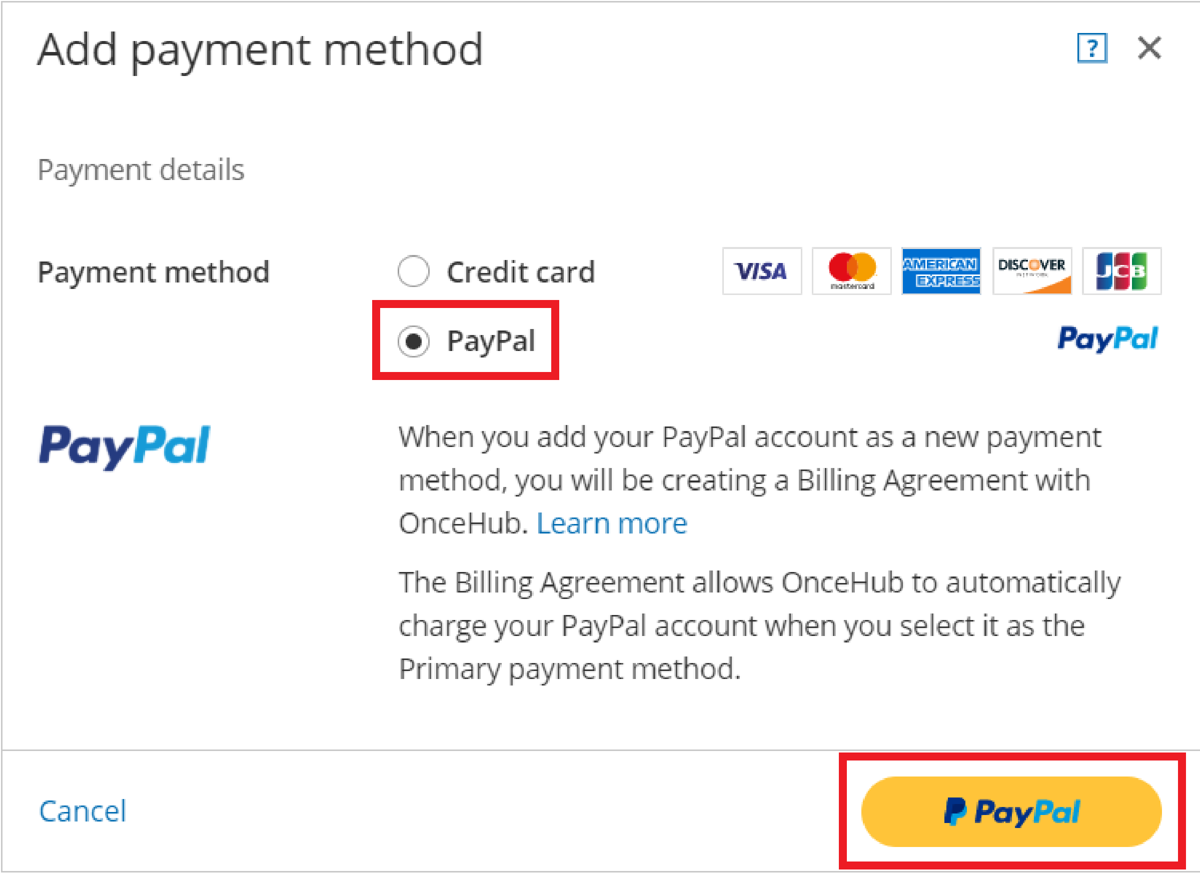

Figure 3: Selecting PayPal as the payment method

2. Click the **PayPal** button (Figure 2).

3. On the PayPal login page, enter your PayPal login details and click **Log In**.

4. Select the card you want to use or add a new card.

1. Click **Continue**.
2. Click **Agree & Continue** to authorize the creation of a Billing agreement between OnceHub and your PayPal account.
   If authorization is successful, the Billing agreement with PayPal is created and added as a payment method.
3. Click **Close** to return to the **Payment methods** section.

The PayPal payment method is added to your OnceHub Account as an additional payment method.

Note:

To remove a payment method, click the action button (three dots) in the row of the specific payment method you want to remove. Then, click **Remove**.

Setting an additional payment method as the primary payment method

1. In your OnceHub Account, go to the **Billing → Payment methods** section.
2. Click on the action menu (three dots) in the row of the card that you want to set as your primary payment

method.

3. Select **Make primary** from the drop-down menu.

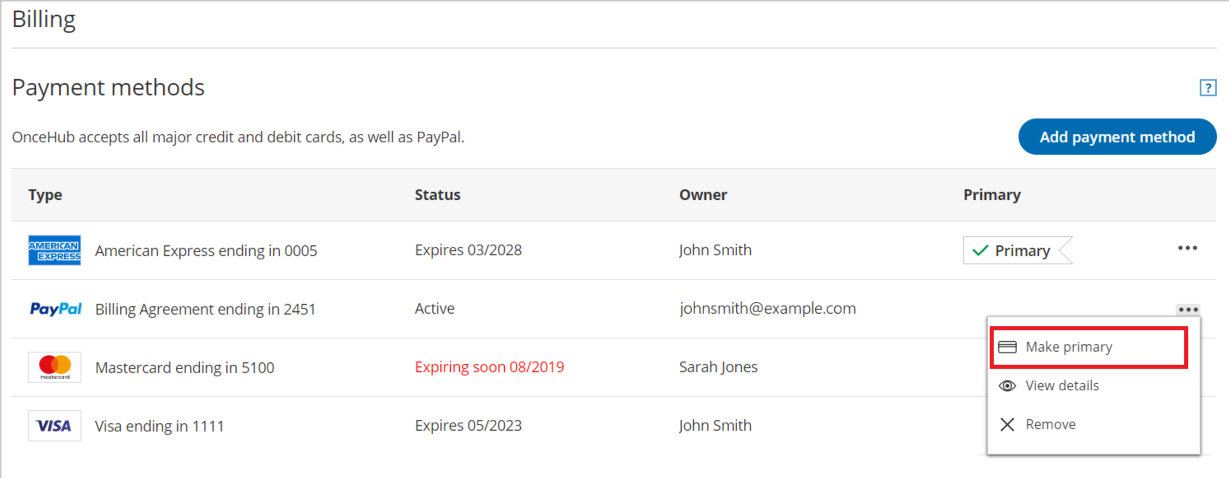

Figure 4: Payment methods action menu

Note:

The previous primary payment method will become an additional payment method.

Changing payment methods

Changing the payment method used for recurring payments

Recurring monthly or annual subscription payments are automatically charged to the primary payment method.

We will select the previously-selected payment method as the default payment method. To use a different payment method for recurring payments, you'll need to add it as an additional payment method and then set it as the primary payment method.

Using a payment method on file to make a one-off purchase

When you make a one-off purchase on your OnceHub Account, such as purchasing SMS credits, you can choose to pay with a payment method you have already added or pay with a new payment method (Figure 4).

- If you choose to pay using an existing additional payment method, the additional payment method automatically becomes your primary payment method. The previous primary payment method will become an additional payment method.
- If you choose to **use a new payment method**, the new payment method will be stored in the **Payment methods** section and become your primary payment method. The previous primary payment method will become an additional payment method.

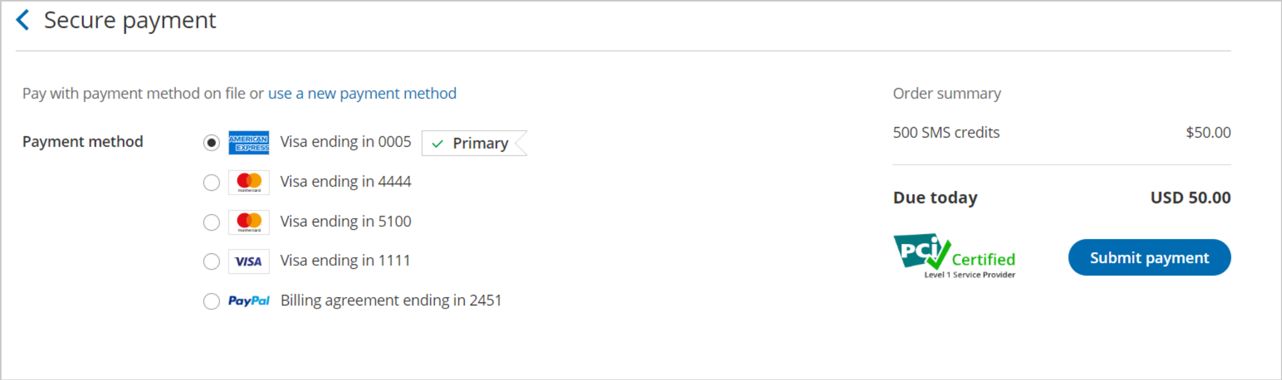

Figure 5: Selecting a payment method when making a one-off purchase

Recovering from a failed recurring payment

If we are unable to process your payment at the start of your billing cycle, you will be prompted to establish a new recurring payment method to settle the outstanding payment and resume your subscription.

The new payment method will be stored in the **Payment methods** section and become your primary payment method. The previous primary payment method will become an additional payment method.

You are charged a recurring monthly or yearly fee for your OnceHub seat subscription(s), always billed in advance. If we are unable to process your payment at the start of your billing cycle, you will immediately receive an email notification. You can define who receives this notification in your billing notification settings.

What happens when my payment cannot be processed?

When your payment cannot be processed, your secondary payment method will be charged automatically. If neither can be charged, or you don't have a secondary payment method, you will have a 7-day grace period to update your payment details. During this time, you can continue to use the application as normal. Customers can still make bookings and chat live with you.

If you do not renew your payment after 7 days, your account will move to account suspension status. This means you will not be able to access your configuration or utilize any features, including scheduling, live chat, or instant calls. You will be able to update your payment information when you sign in.

If you fail to update your payment method within 14 days, your account's seats will be suspended permanently.

All your account's chatbots, booking pages, booking calendars, and forms will be saved. If you would like to resume your account in future, you can repurchase your subscription and reconfigure assignment for live engagements and scheduled meetings.

We'll send you email notifications when your payment cannot be processed, when the account goes into account suspension status, and again once your seats are suspended permanently.

How can I resume payment?

1. Sign in to your OnceHub Account as an Administrator.
2. In the banner below the top navigation bar, click the Resume **payment** link (Figure 1).Figure 1: Payment failure notice
3. You will be prompted to establish a new recurring payment method for your account. Enter your payment details and click **Submit payment**.

Once your payment has been processed successfully, you'll receive your regular recurring payment email notification, as per your billing notification settings.

> **Note:**
>
> Your billing date doesn't change when you resume payment for your subscription. For example, let's say you purchased a monthly subscription and are billed on the 10th of each month. If you resume payment on the 15th of the month, your next billing date will still be the 10th of the following month.

Billing notifications

OnceHub provides billing notifications that alert Users to events throughout the billing lifecycle. Billing notifications are managed in your OnceHub Account in the **Billing → Notifications** section. You have complete control over which billing notifications are sent and who receives them.

In this article, you'll learn about the different types of billing notifications and how to control which notifications are sent to each User.

Who receives billing notifications?

Any User in your OnceHub Account can receive billing notifications. They do not need an assigned product seats. Learn more

OnceHub Administrators can select which Users in the account should receive billing notifications and decide which billing notifications each User will receive. By default, the OnceHub Administrator who made the first purchase on the account will receive all billing notifications.

> **Important:**
>
> At least one User must receive payment failure notifications.

Types of billing notifications

OnceHub provides billing notifications that cover key events throughout the billing lifecycle:

- **Advance billing notice**: Sent 7 days before a recurring subscription payment is due.
- **Payment and invoicing**: Sent when a subscription payment has been completed successfully or when an invoice has been issued.
- **Payment failure notice:**Sent when a recurring subscription payment cannot be processed.
  - The first payment failure notice is sent when your card cannot be processed.
  - The second notice is sent 7 days after your payment could not be processed.
  - The third and final notice is sent 3 days before your account is deleted.
- **Card expiration notice:** Sent 21 days, 11 days, and 1 day before the card used to pay for your OnceHub subscription expires.

Requirements for managing billing notifications

You must be a OnceHub Administrator to manage billing notifications.

Managing billing notifications

1. Sign in to your OnceHub Account.
2. In the top navigation menu, select the gear icon **→ Billing → Notifications** (Figure 1).Figure 1: Billing Notifications section
3. To select Users who should receive billing notifications, click the **Select Users** drop-down.
4. You can decide which billing notifications each User will receive. To opt out of receiving a notification, simply toggle the specific notification **OFF**. To opt in, toggle the notification **ON**.
5. Click **Save**.

Transactions and invoicing

OnceHub provides full access to all of your account's transactions and invoices. You can generate invoices and view your account's paid and pending transactions in your OnceHub Account in the **Transactions** section.

You do not need an assigned product seat to access billing, though you do need to be an Administrator. Learn more

To access the **transactions** section, sign in to your OnceHub Account. In the top navigation menu, select the gear icon → **Billing** → **Transactions**.

Transactions

Each transaction listed includes the following information:

- The date.
- The amount charged on your card.
- The type of the transaction.
- A link to the invoice.

All invoices can be downloaded in PDF. To download an invoice in PDF, click the download icon in the row of the invoice you'd like to download.

Important:

All billing dates and times for transactions and invoices are shown in Coordinated Universal Time (UTC).

There are three types of transaction that generate invoices:

1. **Transactions initiated by a User:** These transactions include first-time product purchases, and SMS credit purchases. These transactions are paid for immediately and are therefore displayed in the transaction history. When you make a first time product purchase or SMS credit purchase, you'll receive an email with an invoice right away.
2. **Recurring transactions initiated by the system:** These are automatic renewal transactions that occur in monthly cycles. These transactions will be displayed both in the **Next payment** box (future recurring transactions yet to be completed) and in the transaction history (past recurring transactions that have already been completed).
3. **OnceHub payment integration transaction fees:** These transactions are only applicable if you are using our Payment integration via OnceHub. OnceHub charges a 1% transaction fee for each payment made via OnceHub, in addition to the fees charged by PayPal. Transaction fees are charged instantly when you collect a

payment from your Customers via OnceHub.

Buyer details on invoice

To edit the buyer details on invoices, click the action menu (three dots) next to the Transactions heading. Then, select **Buyer details on invoice.**

Here, you can customize the buyer's details on the invoice. For example, you can add your company name, company address, tax number, or other data. The changes you make will be dynamically added to all future invoices.

> **Note:**
>
> This field is limited to 200 characters.

OnceHub Payment integration transaction fee invoice

> **Note:**
>
> The information in this article only applies if you are using payment integration with OnceHub.

The Payment integration and transaction fee invoice includes all Payment integration transaction fees incurred by your OnceHub Account for one month. As per the terms agreed, OnceHub charges your PayPal account a 1% transaction fee for accepting payments through OnceHub.

By default, all OnceHub Administrators receive the OnceHub Payment integration transactions fee invoice. You can add additional billing contacts who will be copied on to this invoice. For example, you may wish to add your company's accountant or bookkeeper as an additional billing contact.

When is this invoice issued?

If you received payments via OnceHub during the prior month, the transactions fee invoice will be issued on the first day of the following month. This will include all transaction fees paid for in the previous month. Please note that the Payment integration transaction fee invoice is not related to the monthly or yearly cycle of your Account.

Transaction fees are charged instantly when a payment is collected via OnceHub. The invoice therefore provides a summary of retrospective charges and will always appear in your Transaction history.

If you delete your OnceHub account, an email with the transaction fee invoice attached will be sent to you immediately upon deletion, instead of on the first day of the following month.

What's included in this invoice?

Transaction items are classified by the Event type name and are grouped by the amount paid. The amount paid can either be the Event type price or the reschedule fee. The transactions table consists of four columns (see Figure 1):

1. **Description:** This column provides information about the Event type name and the type of transaction. There are two transaction types: transactions related to scheduling a booking (collection of service fee) and transactions related to rescheduling a booking (collection of reschedule fee).
2. **Transaction fee:** This column specifies the value of the 1% transaction fee for the specific transaction item. For example, if the transaction item is a consultation with a service price of $100, the transaction fee specified

will be $1.

3. **Transactions:** This column specifies the number of transaction items comprised per itemized transaction row.
4. **Total:** This column presents the sum of transaction fees paid for each transaction item (the transaction fee multiplied by the number of transactions). For example, for 500 scheduling transactions with a service price of $100, the transaction fee will be $500 (500*($100*1%).

> **Note:**
>
> If you are receiving payments via OnceHub in multiple currencies, there will be a separate transaction table for each currency. All transactions tables will be displayed one under the other in the monthly invoice.

Refund policy

You can request a refund for any recently renewed account.

We will send you an advance billing notification one week before your next scheduled payment. This will give you a chance to end your subscription before your next billing cycle. You can cancel any time you wish. If you miss this notification and still wish to end your subscription, please let us know. We will be happy to provide a refund to any recently renewed account, no questions asked.

To request a refund of a recently renewed account, please contact us.

Your business contact details in OnceHub

When you pay for your account, OnceHub asks for the following business contact details:

- **Business name**
- **Country**
- **Street address**
- **City**
- **State**
- **ZIP/Postal code**

Depending on your address, you may be charged a sales tax according to regional law.

> **Note:**
>
> Is your organization tax-exempt? Submit your certificate

Updating your business contact details

If you change your residing address, you can update this for accuracy.

In your OnceHub account, go to **Billing → Transactions**. Above the listed invoices, you can see your current business contact details. Select **Edit** to update your account with new contact details.

Payment FAQs

When is a Billing Agreement created?

A Billing Agreement is created between OnceHub and PayPal in the following scenarios:

- When you use PayPal to purchase your first OnceHub product.
- When you make a one-off purchase using a new PayPal payment method (for example, when purchasing SMS credits).
- When you add a new PayPal payment method to your account.
- When your account goes into payment hold and you use a new PayPal payment method to settle the outstanding payment.

Once the Billing Agreement is created, the PayPal account is added as a payment method. To manage your payment methods, go to **Billing → Payment methods.**

Do I need to add my credit card details to PayPal?

In order to have an active billing agreement with OnceHub, PayPal requires that you have a valid debit or credit card in your PayPal account. If your PayPal account has a balance available, it will be charged first. If your PayPal balance is insufficient, the balance will be deducted from your active payment card.

How can I cancel a PayPal Billing Agreement with OnceHub?

When you remove a PayPal payment method from your OnceHub Account, the Billing Agreement is automatically canceled.

You can also cancel a Billing Agreement at any time in your PayPal account. However, if you cancel a Billing Agreement, OnceHub will no longer be able to charge this payment method.

> **Note:**
>
> When you cancel a Billing Agreement, OnceHub will no longer be able to charge this payment method. To avoid issues with your recurring payments, we recommend changing your primary payment method before canceling the Billing Agreement.

OnceHub service and support

Last Modified on Nov 4, 2024

We offer multiple channels of support to assist you in starting and maintaining your OnceHub Account. Read on to learn about how to utilize OnceHub service and support.

Introduction to OnceHub support

Instant answers

Our knowledge base maintains hundreds of articles and a video library, curated to introduce the features available to you and how to use them. If you have a question, there's a high likelihood the answer is in our knowledge base.

New account? Make the most of it!

Just signed up for an account? We hope you enjoy this opportunity to test drive the full functionality of OnceHub. Feel free to play around with Booking pages and Chatbots and get acquainted with no limits and no obligation.

You can also read our Getting started guides for Booking pages and Chatbots, giving you the most important setup information at a glance.

Want step-by-step setup assistance?

If you're interested in having us take you through the process of setting up your account step-by-step, until you are completely configured and ready to start, or training your employees in using OnceHub, we're happy to help. We offer setup assistance packages for step-by-step help and training, priced at $125/hour.

During the session(s), we will discuss your requirements, make suggestions for efficient implementation, and be right there with you as you set up your account, every step of the way.

Do you have security and compliance questions?

OnceHub has a comprehensive security program that meets internationally recognized standards. We're experienced in handling strict security and compliance requirements from corporate organizations and various industry sectors. You can find an overview of our security at the OnceHub Trust Center or contact our security department for additional questions at trust@oncehub.com.

Learn more about Security, Privacy & Compliance

System requirements

OnceHub uses advanced HTML and JavaScript technologies. Therefore, it performs best on modern browsers that support the latest internet standards.

On the desktop

- **Google Chrome:** Latest versions
- **Mozilla Firefox:** Latest versions
- **Microsoft Edge:** Latest versions
- **Apple Safari on a Mac*:** version 5 and above

*We recommend not to use Safari on Windows. Apple has stopped its development and it may contain bugs.

> **Note:**
>
> Microsoft Internet Explorer is not supported.

On mobile devices

- The OnceHub customer application fully supports mobile browsers on iOS and Android devices.
- The OnceHub administration side is limited on mobile. We are currently working on creating a mobile app so that you can stay connected on the go. In the meantime, we recommend you continue using the desktop application.

If you are using a browser that is not on this list, you may still be able to work with OnceHub, but it is not recommended as performance and presentation may not be optimal.

Customer application accessibility

OnceHub is committed to providing a solution that is accessible to everyone. It is our top priority to design and engineer products with a focus on usability and accessibility for all our users and their customers, with or without a disability. Our value for compliance is a differentiating factor in the scheduling market. Organizations that are obligated by law to meet accessibility standards can safely use our products, knowing they meet those requirements.

The standards we meet

- A and AA levels of the Web Content Accessibility Guidelines (WCAG) 2.0
- Section 508 as published in 2017
- ADA Standards for Accessible Design (Americans with Disabilities Act)

The OnceHub Customer application fully meets these standards. Our User application, where account holders setup their accounts, partially meets these standards. We continue to make improvements to the accessibility of our products.

The principles we follow

- **Design best practices** - We follow UX and UI gold standards such as: readability, consistency, structured navigation, orientation order, clear hierarchy, semantic content, code validation and more.
- **Inclusive design approach** - We operate according to the principles of universal design, understood and used by all people regardless of age, ability, or circumstance. From the conceptual mental model to the last tooltip, we always consider equality and diversity.
- **Screen readers** - Users who are blind or visually impaired can make full use of OnceHub thanks to our comprehensive support for screen readers.
- **Keyboard-only usage** - Customers can easily schedule bookings, all with just the use of a keyboard and no mouse.

Learn more in our Accessibility Conformance Report or VPAT (Voluntary Product Accessibility Template).

Setup assistance packages

You have access to our free onboarding webinars which are run daily to provide you with all the training you need to get the most out of the platform. All products also come with a comprehensive getting started guide that includes short videos that give you a full overview of the application and its capabilities. Learn more about Getting started with Chatbots and Getting started guide with OnceHub

If you're interested in having us walk you through setting up your account or require that all your employees will be trained on using OnceHub, we're happy to help. We offer setup assistance packages for step-by-step help and training, priced at $125/hour. Book your session now.

During the session(s), we will discuss your requirements, make suggestions for efficient implementation, and be right there with you as you set up your account, every step of the way.

What will we do during our session(s)?

OnceHub

- Set up multiple Event types
- Implement calendar integration
- Customize email templates
- Set up CRM integration
- Help you add and manage Zaps within OnceHub
- Create multiple User accounts for employees
- An hour or more of training with all your employees on board, learning how to use OnceHub (session can be recorded at request)
- Anything else we've agreed upon after consulting with you

Is a setup assistance package right for you?

Possibly, if you:

- Don't feel comfortable implementing software configurations on your own, without direction from a professional
- Want to save time by paying a professional to configure OnceHub faster than you'd be able to on your own
- Want all your employees to be introduced to OnceHub fast and effectively, providing them with all the resources and knowledge they require to get started

To purchase a setup assistance package, simply book your session(s). You will be required to pay for the package through our PayPal integration in order to submit the booking.

The OnceHub Service Level Agreement (SLA)

At OnceHub, we understand the importance of data access and service availability. Scheduling is a critical business process and there is never a good time for downtime. Built with a top-tier infrastructure, OnceHub provides the reliability and performance our customers have come to expect.

Nonetheless, as with any cloud software, downtime still occurs. There are two types of downtime.

Planned downtime

Planned downtime is typically required for new releases so we can deploy our latest features. Planned downtime is always performed during off-peak hours and published in advance to prepare our customers for the downtime. Planned downtime usually lasts 30 - 60 minutes and typically occurs on Saturdays, between 12:00 AM – 6:00 AM Eastern Time. Planned downtime occurs 6 - 8 times a year in line with the frequency of our releases.

Unplanned downtime

Even with the best intentions, unplanned downtime and service issues can sometimes occur. Unplanned downtime is usually the result of a third-party service failure or unexpected complications in our releases. In these cases, we report such incidents to our customers as quickly as possible (usually within a few minutes) and make every effort to resolve them as fast as we can. During unplanned downtime, we continually update our customers on the progress that is being made towards a resolution.

Not all unplanned downtime is equal. Unplanned downtime varies, depending on how it affects OnceHub Users (severity level) and also its cause.

Severity levels

Unplanned downtime is divided into severity levels. The level of severity depends on the impact to the usability of OnceHub. Each level has its own formal definition.

- **Severity 1:** The service is down, inoperable, inaccessible, or unavailable. The performance or nonperformance of the service prevents all useful work from being accomplished.
- **Severity 2:** The service is severely limited or degraded. Major functions are not performing properly, causing a significant impact to User's operations or productivity.
- **Severity 3:** The service has a minor issue with minimal impact to business operations; the issue is localized or has isolated impact; or the problem is any other issue that is not Severity 1 or 2.

Only Severity level 1 is applicable to the OnceHub SLA commitments.

Force majeure

When unplanned downtime happens due to acts of god, such as earthquakes, fires, or floods, or things like wars, government sanctions, embargos, or riots, this is considered force majeure. Since force majeure can't be anticipated, it is excluded from the OnceHub SLA commitments.

Third-party applications

Occasionally, unplanned downtime is beyond the control of OnceHub. This occurs when a third-party application, such as an integrated calendar or CRM, is not operating at normal service levels. Typically, the effect of this can be quickly worked around by disconnecting the affected system from OnceHub. Since service issues with third-party applications do not affect the functionality of the core OnceHub platform and OnceHub does not have responsibility for external systems, unplanned downtime resulting from third-party integrations is excluded from the OnceHub SLA commitments.

Uptime Service Level Agreement (SLA)

As part of our commitment to customers, we aim to provide 99.9% uptime. The OnceHub SLA only includes unplanned downtime of severity level 1. It does not include other types of downtime—specifically, the following downtime is excluded from the SLA:

- Planned downtime

- Unplanned downtime at severity levels 2 and 3
- Unplanned downtime resulting from force majeure
- Unplanned downtime resulting from third-party applications.

When calculating our monthly uptime, only unplanned downtime of severity level 1 should be considered. Our 99.9% uptime commitment is equivalent to 43.8 minutes per month or 8.76 hours per year of unplanned downtime. As part of our service level commitments, all types of downtime are published. This type of transparency ensures we meet our uptime goals.

To monitor our system status or planned downtime, visit our status page or subscribe to status notifications on our dedicated twitter feed. Learn more about the status page

Understanding the Status page

The Status page provides real time and historic updates on the current status of the Booking pages and Chatbots applications, website and third-party integrations. The Status page reports information for both planned and unplanned downtime. The Status page is located at status.oncehub.com.

Planned downtime
OnceHub may perform planned system maintenance and upgrades for the service from time to time. Typical duration of planned downtime lasts 30 - 60 minutes. Planned downtime will commonly occur on a Saturday, between 1:00 AM – 6:00 AM Eastern Time. Any planned downtime within this maintenance window, as well as any planned downtime outside of it, will be communicated via the Status page.

Unplanned downtime
While extremely rare, OnceHub sometimes experiences unplanned downtime or service disruptions. We report such incidences to our Customers as quickly as possible and make every effort resolve them as quickly as possible. The Status page will always reflect the most up-to-date information available about service disruptions.

Subscribe to updates
You can subscribe to status updates via RSS feed or Twitter. The links to subscribe are located in the upper-right corner of the Status page. The Twitter account is @StatusOnce. All planned and unplanned downtime will be reported simultaneously with the Status page updates.

Understanding service statuses
The Status page displays an overview of OnceHub service performance for the last five days. You can see a full performance history of a service by clicking on the individual service, for example the Corporate website.

The Status page uses icons to communicate if a service is running as normal, if there is an interruption or if a reported incident was resolved:

✓	The service is up and functioning as normal.
⚠	The service is running but not performing optimally. The service can still be used but there may be some limitations.
✕	The service is down and cannot be used.
ℹ	An incident was reported, has been resolved and the service is functioning as normal. If an incident was resolved on the current date, you will see this icon overlapping with the green checkmark above.

Generating your support code

Generating your support code

Read on to learn how to generate your support code.

Your support code enables us to access your account if necessary. All OnceHub accounts have a support code. You may be asked to provide your support code if you contact us through one of our support channels.

Your generated support code is valid for 30 days only. After this, you must generate a new support code if you require further assistance (if account access is required for reviewing and/or resolving the issue).

To generate your support code:

1. In the top right menu, click on the question mark icon.
2. Select **Generate support code**.
3. **Copy**.

Accessing your account with single sign-on (SSO)

Last Modified on Nov 5, 2020

Signing in with single sign-on (SSO) is a feature designed specifically for organizations using an identity provider across their organization to regulate signing into all their third-party apps through SSO. This may include identity providers such as:

- Okta
- OneLogin
- Azure
- G Suite

To use SSO to sign into OnceHub, your OnceHub Administrator must have already configured SSO for your account.

To access your OnceHub account, click the **Sign in with SSO** link at the bottom of the OnceHub sign-in page.

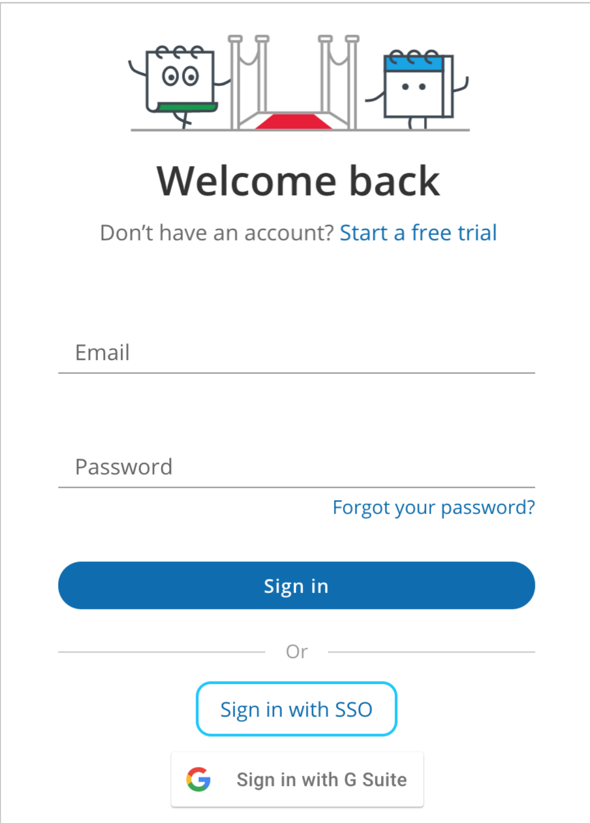

Figure 1: Sign in with SSO

You will provide your email and be redirected to your identity provider. Once authenticated, you'll be returned to your signed-in OnceHub account.

If you're having difficulty signing in, please don't hesitate to contact us for more help.

Configuring single sign-on (SSO) for your account

Last Modified on Nov 5, 2020

Signing in with single sign-on (SSO) is a feature designed specifically for organizations using an identity provider across their organization to regulate signing into all their third-party apps through SSO.

Requirements

To configure SSO in your account, you must be a OnceHub Administrator. However, you do not need a product license. Learn more

You must already have an account through an identity provider (IDP) such as Okta, OneLogin, Azure, or G Suite. You can also configure SSO if you have G Suite, without installing through the G Suite Marketplace.

> **Note:**
>
> If you set up SSO for your OnceHub account, you cannot set session policies or lockout policies. Users also cannot set up 2-factor authentication in OnceHub.

Fields mapped

This article includes guidelines on configuring SSO in OnceHub and your IDP.

Some are grabbed in OnceHub and entered in your IDP's admin area. Others are grabbed from your IDP and added to OnceHub.

From OnceHub to your IDP

Identifier URL

A unique string identifying the provider issuing a SAML request. This is usually in URL format. It is not always required by providers.

Sometimes called the **Entity ID** in various IDPs.

ACS URL

An Assertion Consumer Service (ACS) that provides the location where OnceHub accepts the SAML response, for the purpose of establishing a session based on an assertion.

With some IDPs, such as Okta, you will use the OnceHub **ACS (Assertion Consumer Service) URL** as the value for the **Single sign-on URL** field in your IDP. This could also be called the **Reply URL**.

This same value can also be used for the **Recipient URL** and **Destination URL** in your IDP.

Single sign-on URL

The URL for signing into your OnceHub account.

Sometimes this is called the **Login URL** (Azure)**, Login redirect URL** (Okta), or something similar.

Unique ID

A unique identifier attribute in your IDP.

You will be mapping the attribute **email** (letters all in lower-case) to your employee/user email field.

From your IDP to OnceHub

Entity ID

A unique string identifying the provider issuing a SAML request. This is usually in URL format. It is not always required by providers.

Sometimes called the **Identifier** or **Identifier URL** in your IDP.

IDP single sign-on URL

The URL for signing into your IDP.

Sometimes this is called the **Login URL** (Azure)**, Login redirect URL** (Okta), or something similar.

Public x509 certificate

A digital certificate in the x509 PKI standard, used to sign SAML requests, responses, and assertions between OnceHub and your IDP.

You will copy and paste the certificate in full within OnceHub, including the text for **-----BEGIN CERTIFICATE-----** and **-----END CERTIFICATE-----** .

1. Request access

SSO is intended for accounts with multiple users who take the extra security measure of signing into third-party applications using an identity provider. Please contact us to learn more. OnceHub can enable the SSO functionality in your account manually.

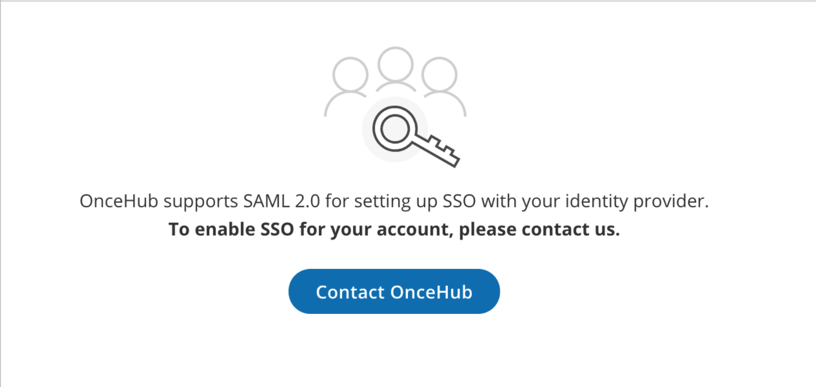

Figure 1: Contact us to enable SSO for your account

2. SAML configuration

You can access SAML configuration at OnceHub **Account settings** -> In the lefthand sidebar, select **Security** -> **SSO**.

OnceHub provides specific field values you can copy and configure within your identity provider.

This includes an **Identifier URL**, **ACS URL**, **Single sign-on URL**, and **Unique ID**.

Next, you will need to map unique ID attributes. The attribute **email** with all lower-case letters should be mapped to your employee/user email field.

3. Required by OnceHub

You will need specific field values from your identity provider you can copy and configure within OnceHub.

This includes an **Entity ID**, **IDP single sign-on URL**, and **Public x509 certificate**.

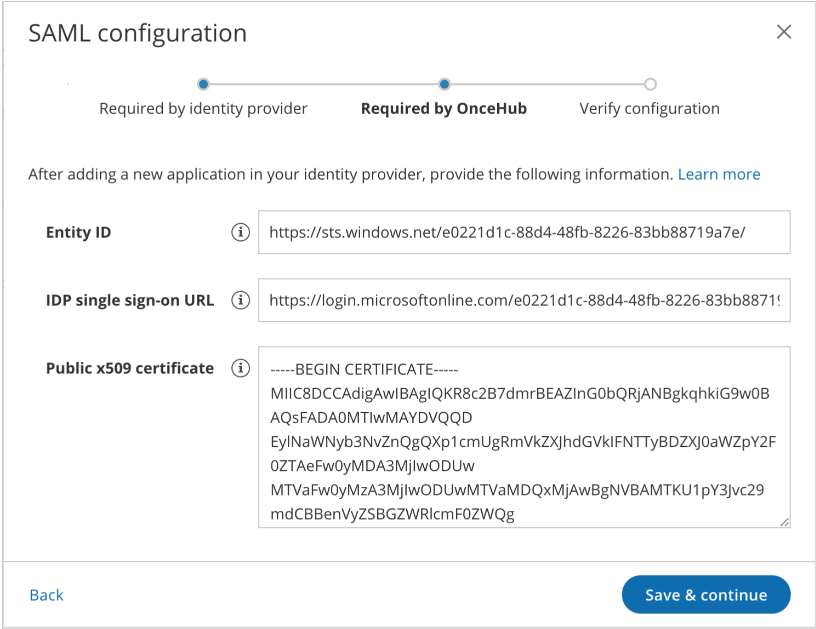

Figure 2: Required by OnceHub - Example uses Azure Active Directory credentials.

4. Verify configuration

OnceHub will speak to your identity provider and verify that the configuration has the correct values on both sides to proceed.

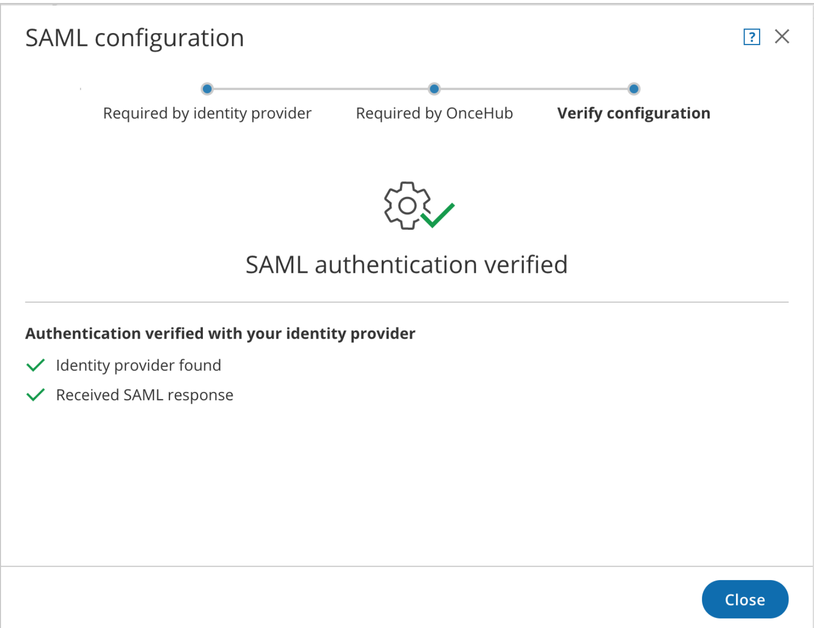

Figure 3: Verify configuration

5. Enable SSO for all users

Once you've verified your SSO configuration, you can select the **Enable SSO for all users** toggle. All Users in your OnceHub account can now access their account using SSO.

Important:

Before you enable the account, make sure all your Users have matching email addresses for their OnceHub User profile and their IDP profile.

Once SSO is enabled, they **will not** be able to change their OnceHub email.

If their OnceHub email does not match the email in their IDP profile, they **will not** be able to log in.

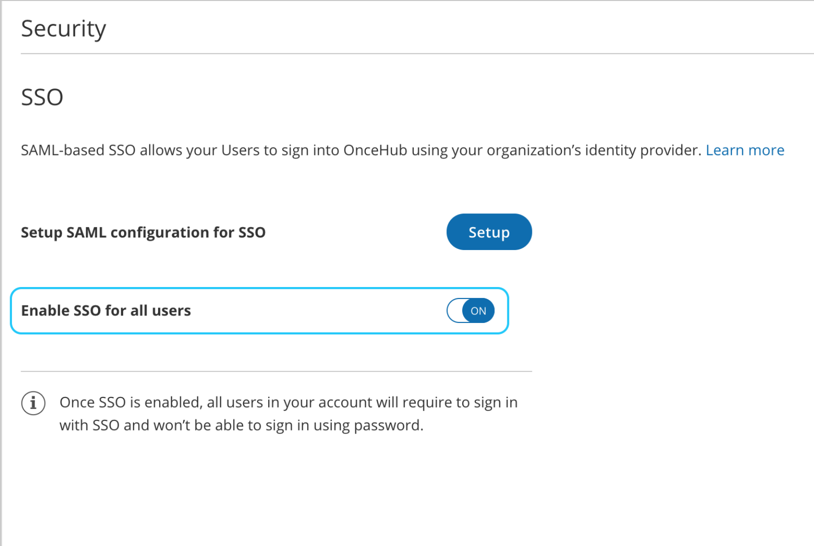

Figure 4: Enable SSO for all users

Note:

If existing Users were already signing into OnceHub using an email and password, they will no longer be able to do so. They will only be able to sign in using SSO.

Configuring SSO with Azure

Last Modified on Oct 26, 2020

This article provides a step-by-step guide to configuring SSO between OnceHub and Azure Active Directory.

Requirements

To configure SSO in your account, you must be a OnceHub Administrator. However, you do not need a product license. Learn more

You must already have an account with Azure AD. The person configuring in Azure AD must be an administrator.

Step-by-step directions

Request access

SSO is intended for accounts with multiple users who take the extra security measure of signing into third-party applications using an identity provider. Please contact us to learn more. OnceHub can enable the SSO functionality in your account manually.

SAML configuration

You can access SAML configuration at OnceHub **Account settings** -> In the lefthand sidebar, select **Security** -> **SSO**.

OnceHub provides specific field values you can copy and configure within Azure AD:

1. In portal.azure.com, go to **Enterprise applications** -> Click on **+ New application**.

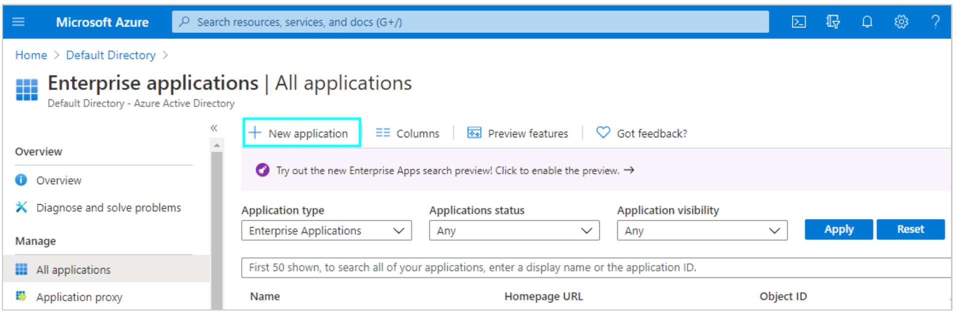

Figure 1: New application

---

2. On the **Add an application** page, select **Non-gallery application**.

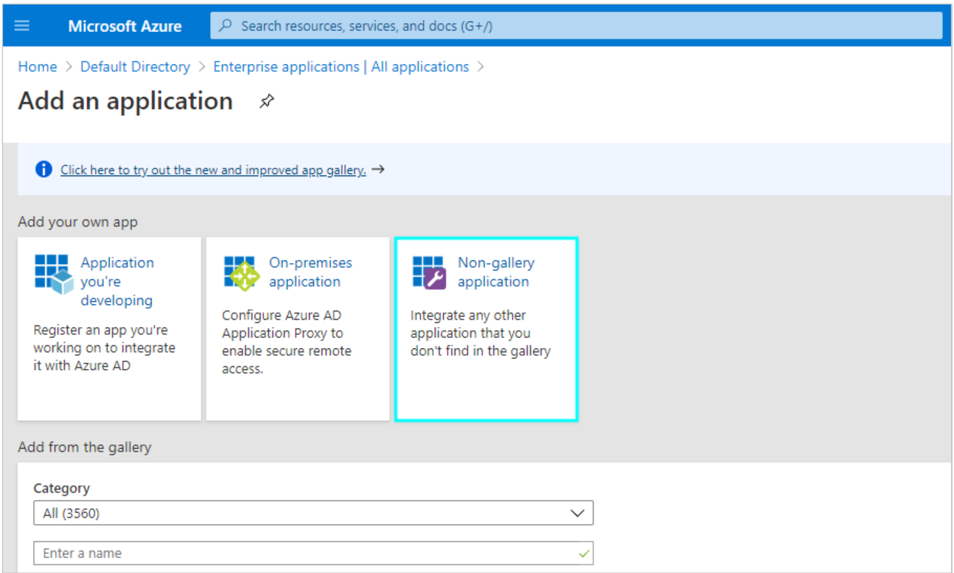

Figure 2: Non-gallery application

3. Add the **Name** (for example, "OnceHub"). Click **Add**.

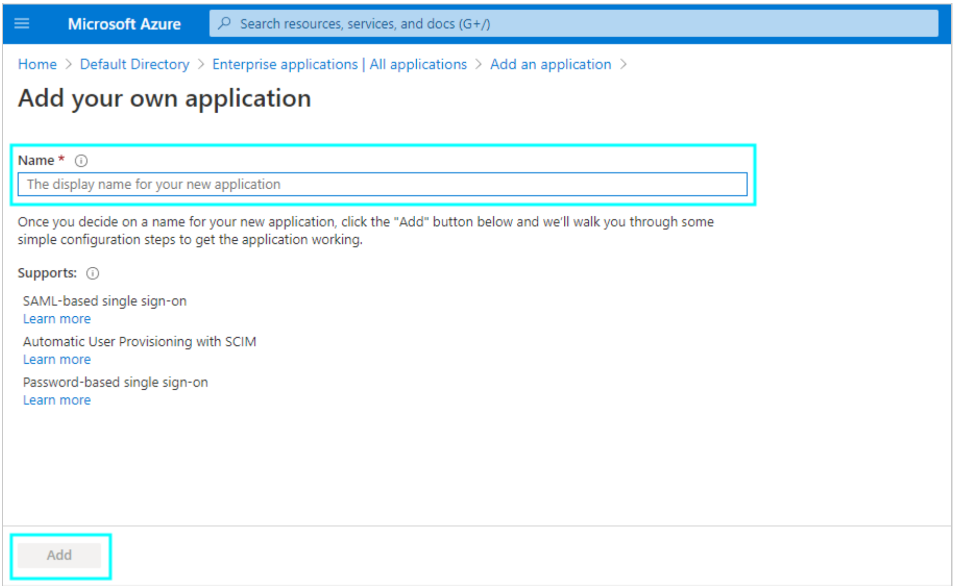

Figure 3: Add name and click Add

4. In the left menu, select **Single sign on**. Click on the **SAML** option.

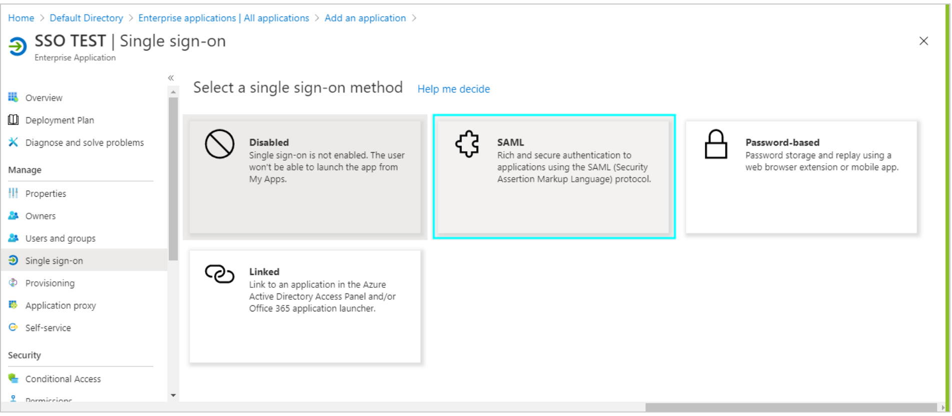

Figure 4: SAML option

---

5. Edit the **Basic SAML Configuration** section.

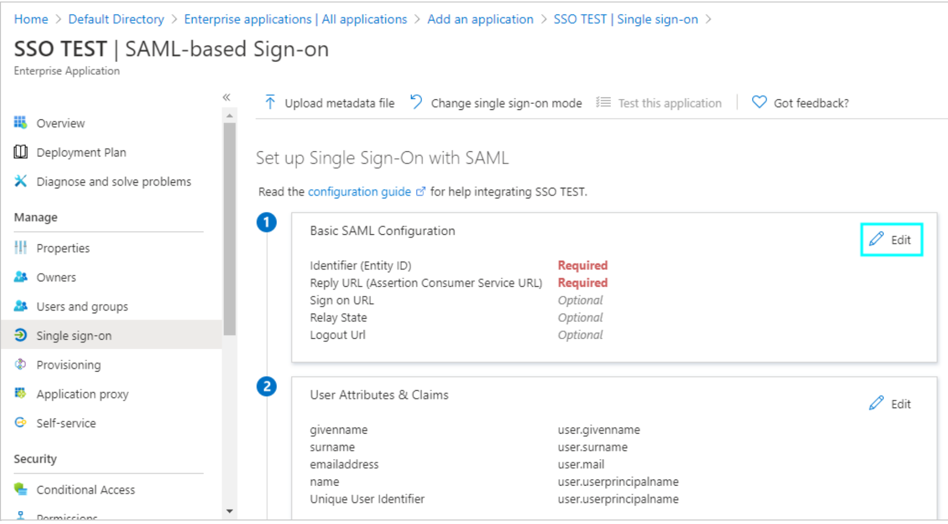

Figure 5: Edit the Basic SAML Configuration section

---

6. On the **Basic SAML Configuration** page, fill in the required fields and save. You can grab these values in OnceHub, on the **Required by entity provider** step.

In Azure AD	In OnceHub
Identifier (Entity ID)	Identifier URL
Reply URL	ACS URL
Sign on URL	Single sign-on URL

These are the only required fields; the rest can be left blank.

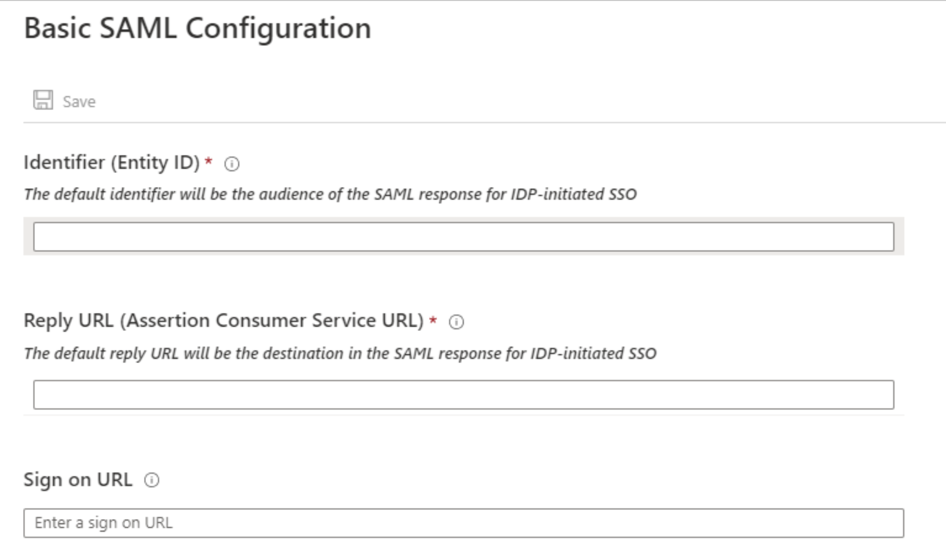

Figure 6: Basic SAML Configuration

7. Edit the **User Attributes & Claims** section**.**

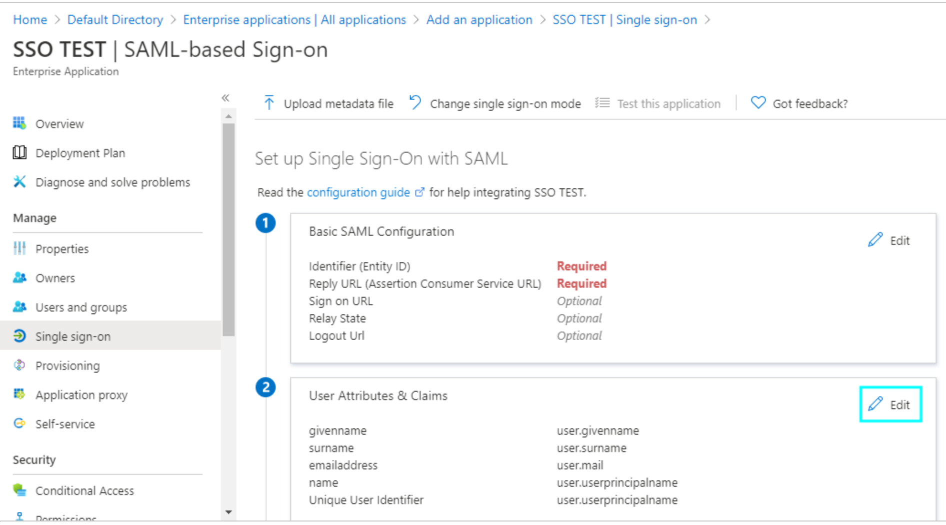

Figure 7: Edit the User Attributes & Claims section

8. Select **+ Add new claim**.

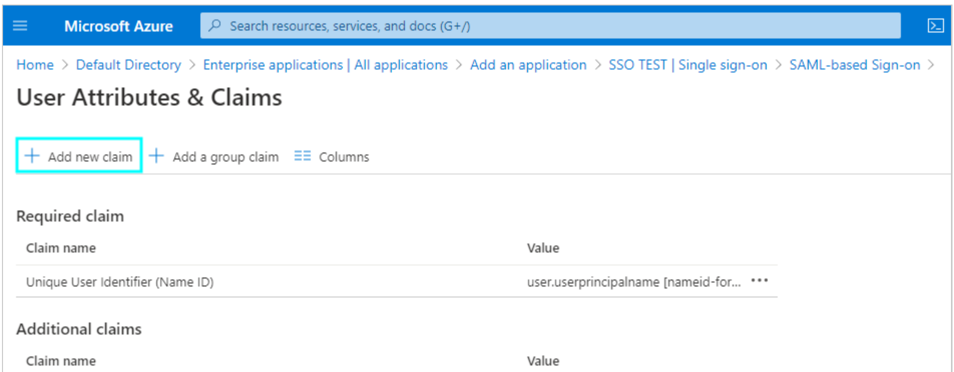

Figure 8: Add new claim

9. On the **Manage claim** page, enter these values:

Name: **email**
Note: Write 'email' in lower-case letters only.

Source: **Attribute**

Source attribute: **user.mail**

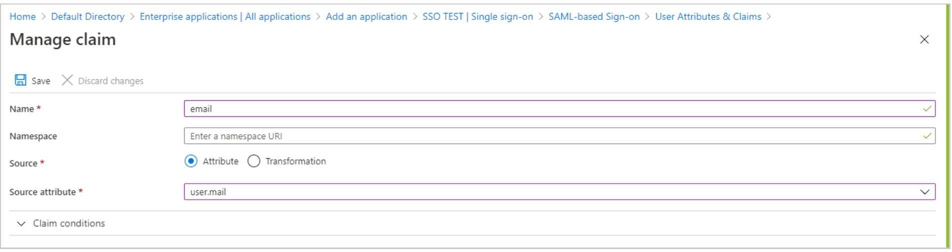

Figure 9: Manage claim

Once you've defined these values, click **Save**.

---

10. Access the SAML Signing Certificate by downloading the **Certificate (Base64)** option.

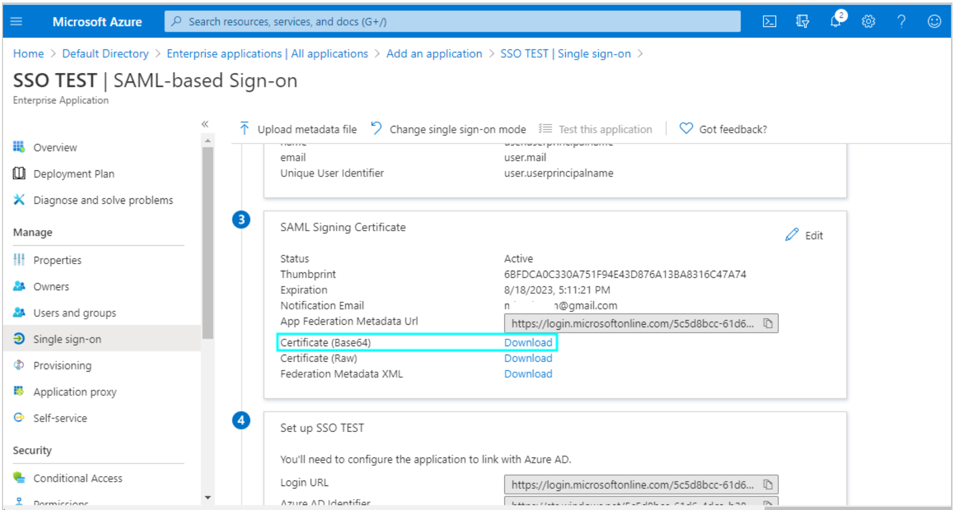

Figure 10: Download certificate

---

11. Go to OnceHub. You've already taken care of the first part, **Required by identity provider**, within Azure AD. In the second part, **Required by OnceHub**, you'll need specific field values from Azure AD that you can copy and configure within OnceHub.

This includes the **Entity ID**, **Single sign-on URL**, and the **Public x509 certificate**. You've already downloaded the certificate. You can grab the other values in Azure AD next to the **4**.

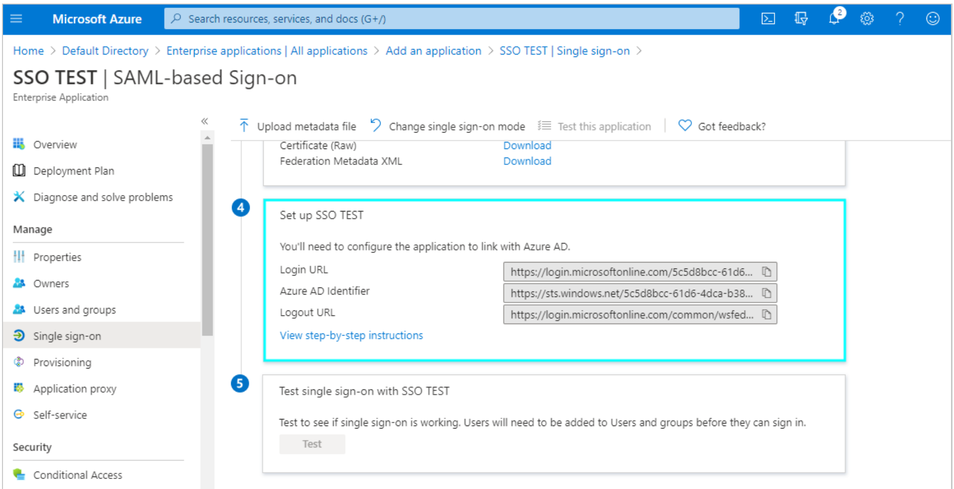

Figure 11: Required by OnceHub step

In Azure AD	In OnceHub
Azure AD Identifier	Entity ID
Login URL	IDP single sign-on URL
Certificate (Base64) - Download and copy/paste whole contents	Public x509 certificate

12. For the certificate field, open the downloaded certificate and copy all contents.

Important:

Include the **-----BEGIN CERTIFICATE-----** and **-----END CERTIFICATE-----** syntax in your selection.

Figure 12: Copy whole contents of certificate text

13. In Azure AD, go to the left menu and select **Users and groups**. On that page, select **+ Add user**.

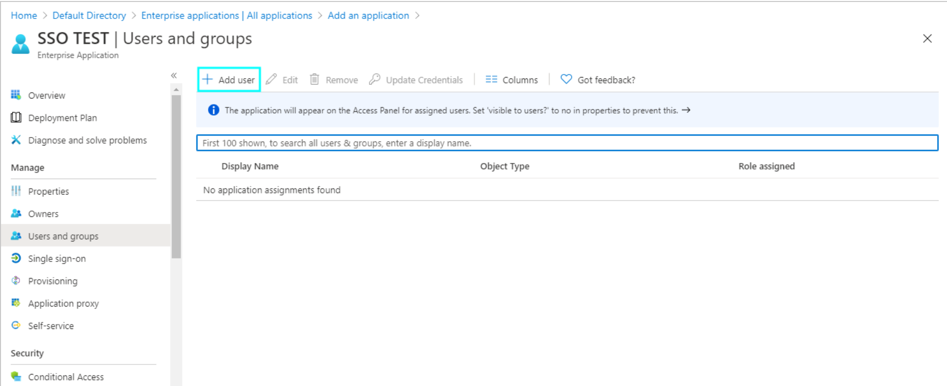

Figure 13: Add user

14. On the **Add Assignment** page, search for relevant users or groups. Select them and click **Assign** when ready.

Verify configuration

OneHub will speak to your identity provider and verify that the configuration has the correct values on both sides to proceed.

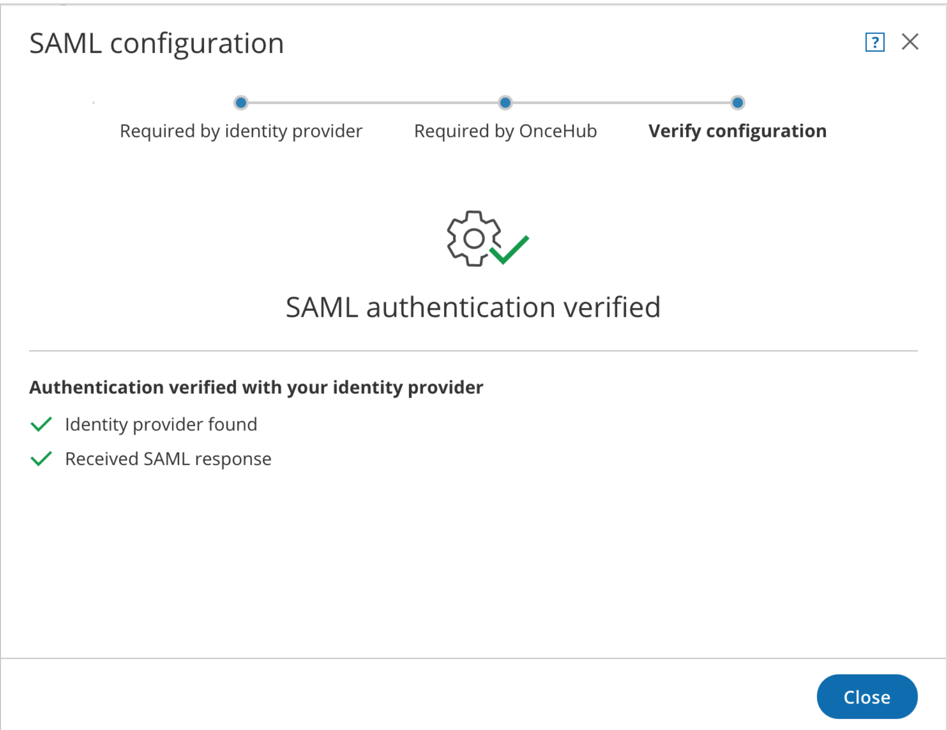

Figure 14: Verify configuration

Enable SSO for all users

Once you've verified your SSO configuration, you can select the **Enable SSO for all users** toggle. All Users in your OnceHub account can now access their account using SSO.

Important:

Before you enable the account, make sure all your Users have matching email addresses for their OnceHub User profile and their Azure profile.

Once SSO is enabled, they **will not** be able to change their OnceHub email.

If their OnceHub email does not match the email in their IDP profile, they **will not** be able to log in.

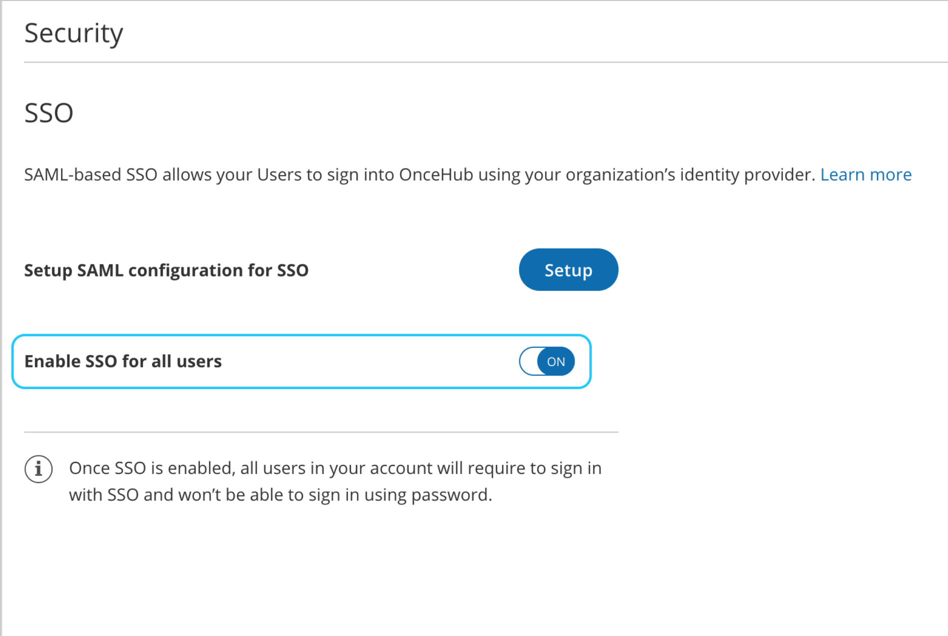

Figure 15: Enable SSO for all users

Note:

If existing Users were already signing into OnceHub using an email and password, they will no longer be able to do so. They will only be able to sign in using SSO.

Configuring SSO with Okta

Last Modified on Oct 26, 2020

This article provides a step-by-step guide to configuring SSO between OnceHub and Okta.

Requirements

To configure SSO in your account, you must be a OnceHub Administrator. However, you do not need a product license. Learn more

You must already have an account with Okta. The person configuring in Okta must be an administrator.

Step-by-step directions

Request access

SSO is intended for accounts with multiple users who take the extra security measure of signing into third-party applications using an identity provider. Please contact us to learn more. OnceHub can enable the SSO functionality in your account manually.

SAML configuration

You can access SAML configuration at OnceHub **Account settings** -> In the lefthand sidebar, select **Security** -> **SSO**.

OnceHub provides specific field values you can copy and configure within Okta.

Make sure you're in the Classic UI. You can select this by going to **Developer Console** -> **Classic UI**.

1. Create a New Application Integration

In Okta, go to **Applications** -> **Create New App**.

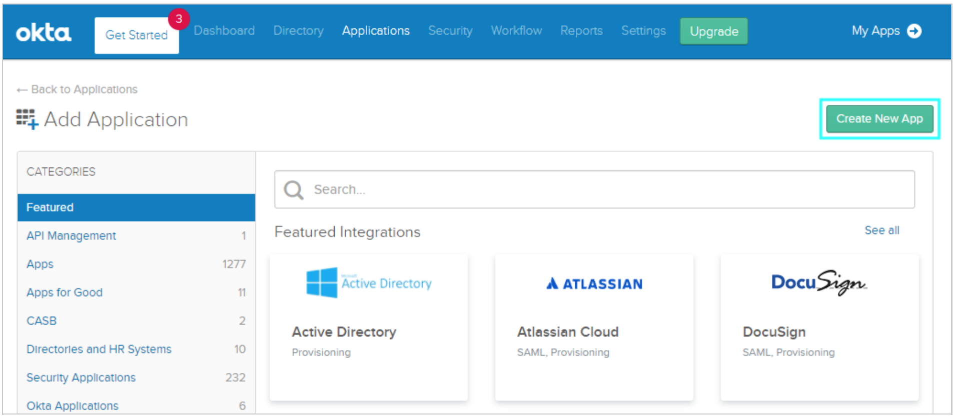

Figure 1: Create New App

In the popup, select **Web**. The sign on method should be **SAML 2.0**. Click **Create**.

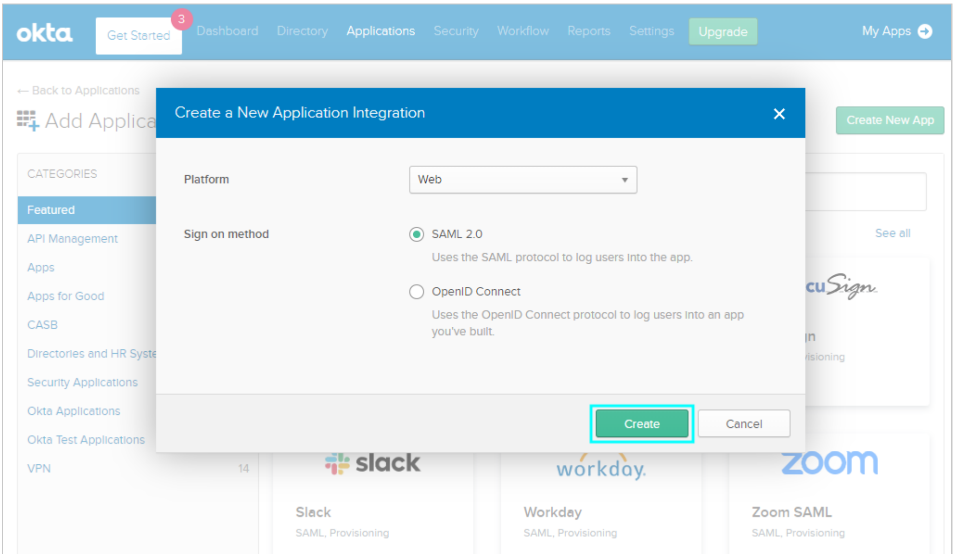

Figure 2: Create a New Application Integration

2. General Settings

On the **Create SAML Integration** page, give the app a name (for instance, OnceHub) and fill out the **General Settings**.

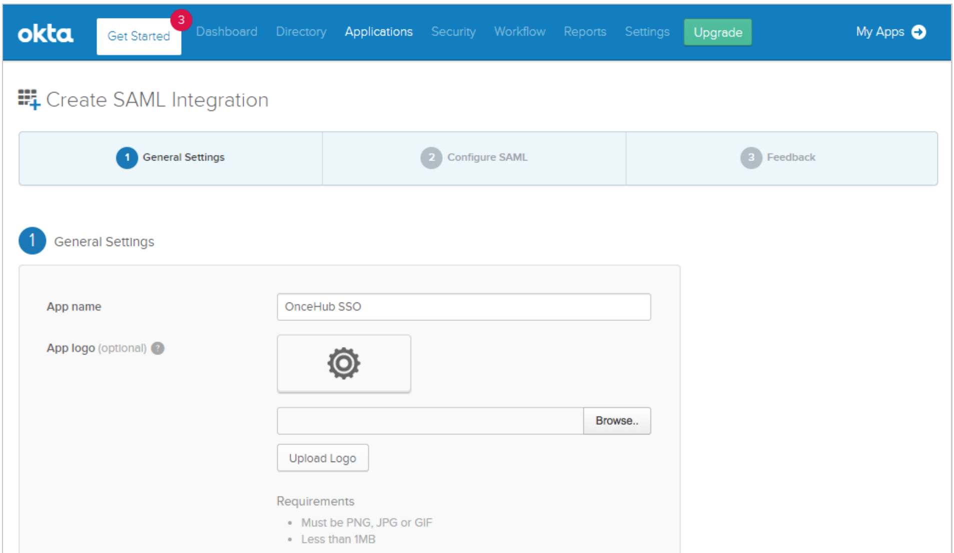

Figure 3: General Settings

3. SAML Settings from OnceHub

On the **Configure SAML** step, fill out the SAML Settings. You can grab these values in OnceHub, on the **Required by identity provider** step.

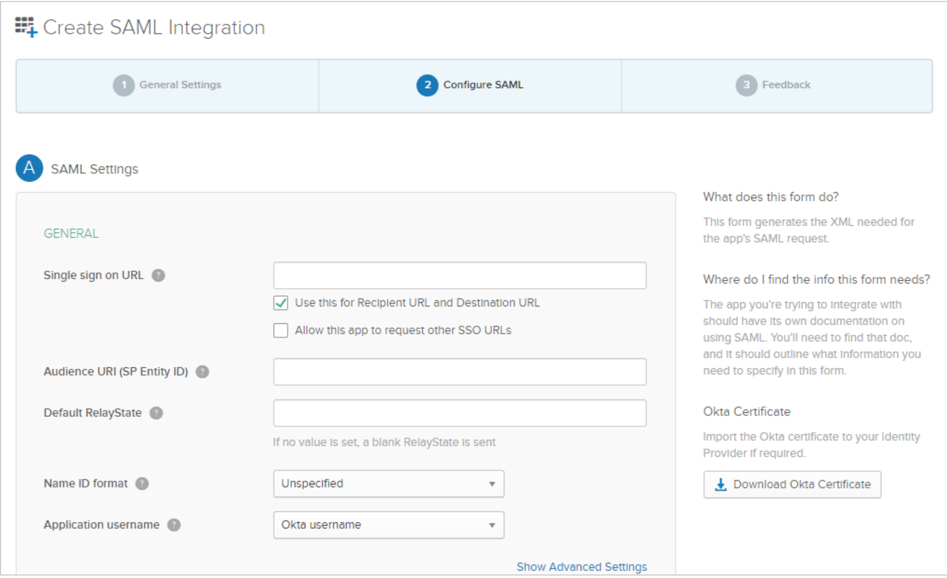

Figure 4: Configure SAML Settings

In Okta	In OnceHub
Audience URI (SP Entity ID)	Identifier URL
Single sign on URL + Select checkbox **Use this for Recipient URL and Destination URL**	ACS URL
[Not required; Okta refers to ACS URL for this function]	~~Single sign-on URL~~

These are the only required fields; the rest can be left blank.

4. Add an Attribute Statement

For the **Name** field, use **email** (in lower case). Map this to the **Value** field **user.email**.

You can keep the **Name format** on **Unspecified**.

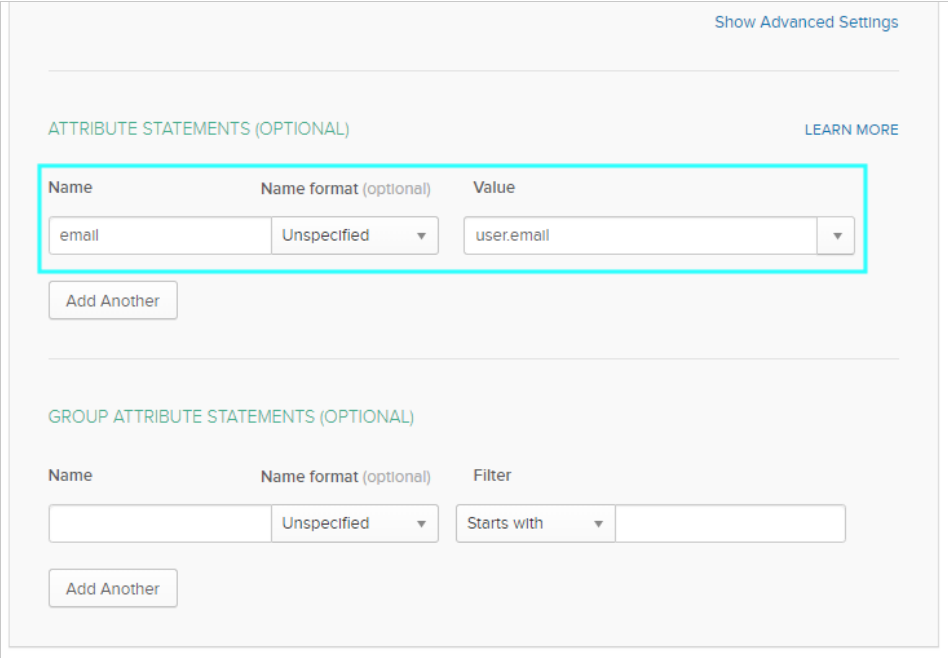

Figure 5: Attribute Statement for email

Once you're ready, click on **Next** and then **Finish**.

5. Grab information from Okta and paste in OnceHub

Click on **View Setup instructions**, which provide the information you will add in OnceHub.

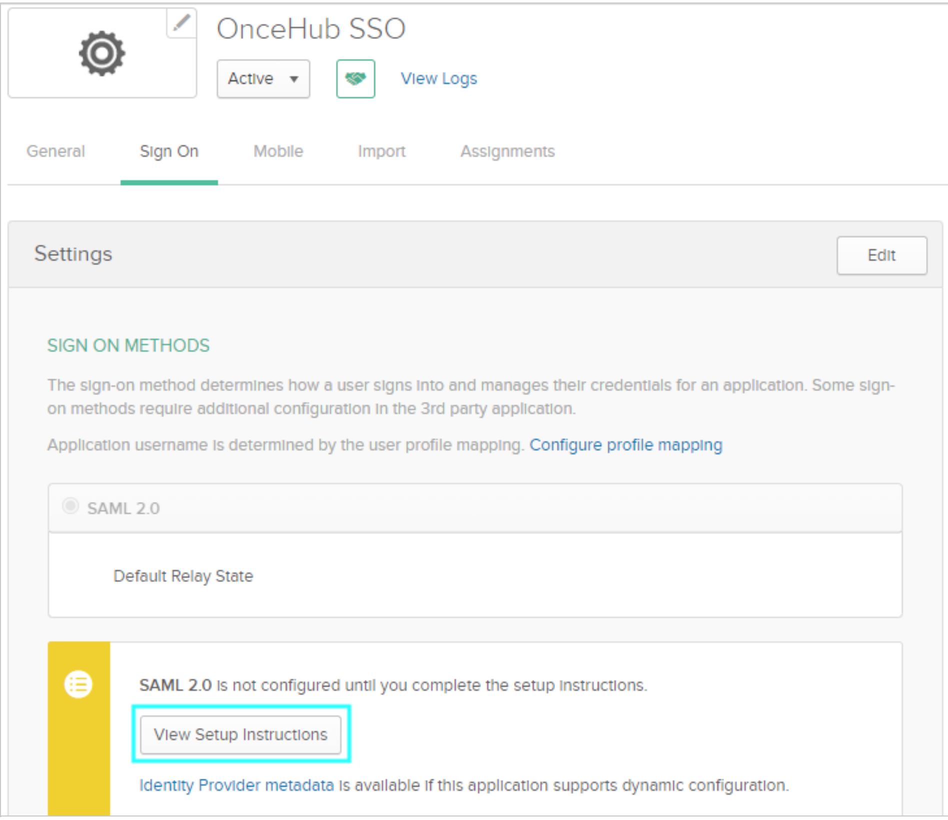

Figure 6: View Setup Instructions

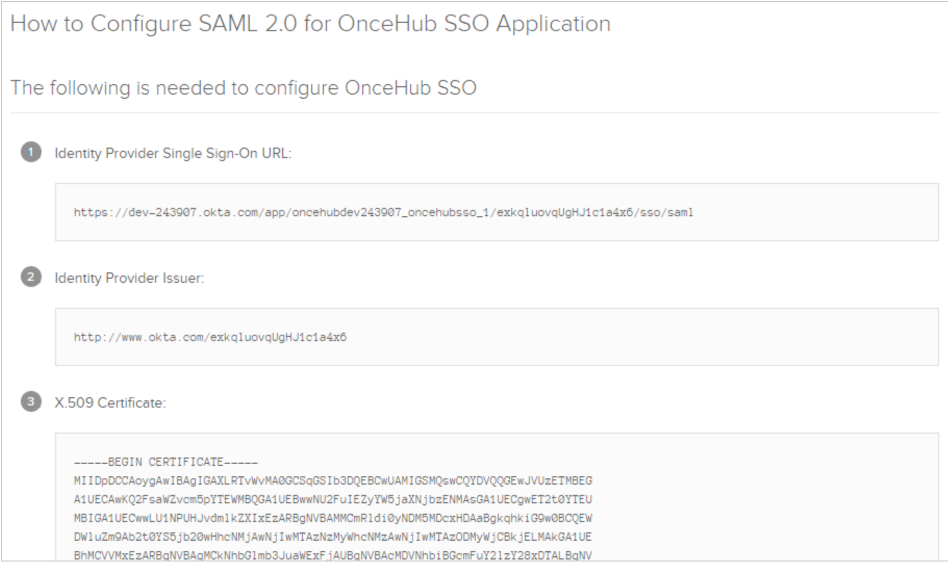

Figure 7: Information from Okta required in OnceHub

In Okta	In OnceHub
Identity Provider Issuer	Entity ID
Identity Provider Single Sign-On URL	IDP single sign-on URL
X.509 Certificate	Public x509 certificate

Important:

For the Public x509 certificate, include the **-----BEGIN CERTIFICATE-----** and **-----END CERTIFICATE-----** syntax in your selection and paste it all into the OnceHub field.

6. Assignments

Before clicking Verify in OnceHub, go back to Okta and access **Assignments**. Click on the **Assign** dropdown and select **Assign to People**.

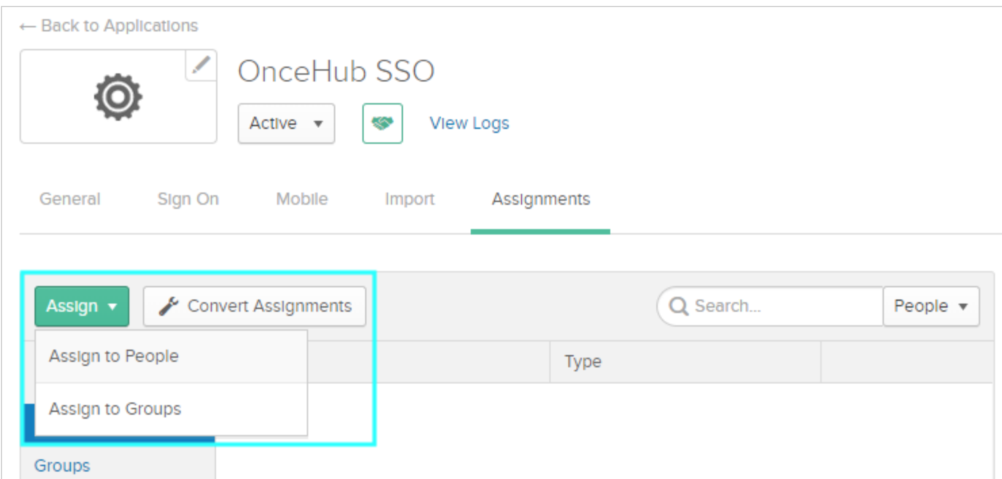

Figure 8: Assign to People

Assign your new OnceHub SAML 2.0 application to the relevant people in Okta.

7. Verify

In OnceHub, click **Verify** to confirm that SAML authentication is verified.

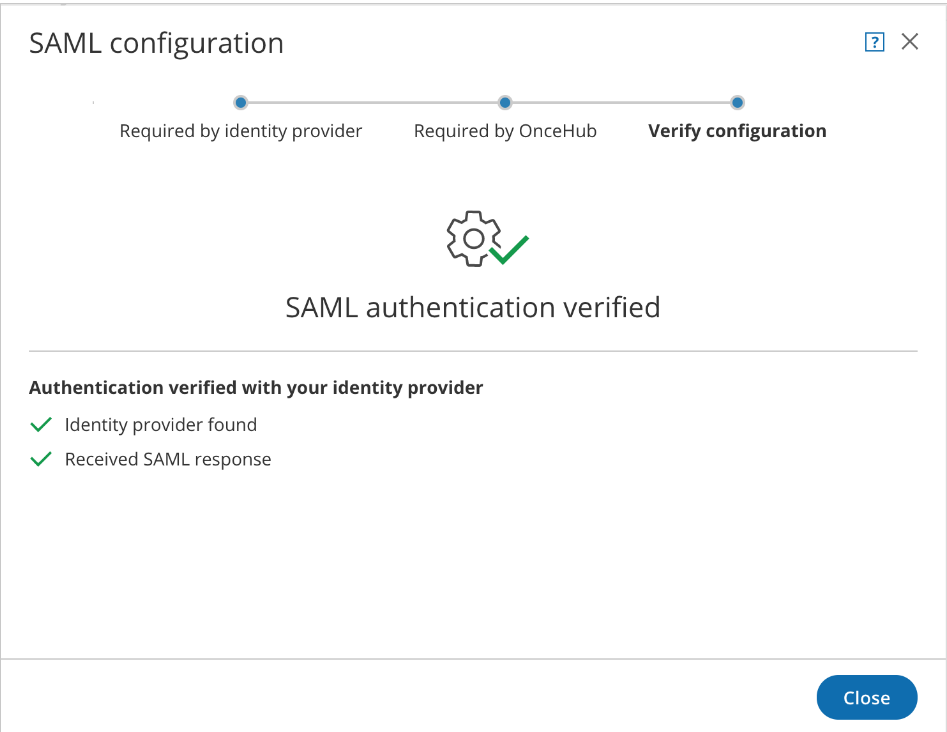

Figure 9: Verify configuration

8. Enable SSO for all users

Once you've verified your SSO configuration, you can select the **Enable SSO for all users** toggle. All Users in your OnceHub account can now access their account using SSO.

Important:

Before you enable the account, make sure all your Users have matching email addresses for their OnceHub User profile and their Okta profile.

Once SSO is enabled, they **will not** be able to change their OnceHub email.

If their OnceHub email does not match the email in their IDP profile, they **will not** be able to log in.

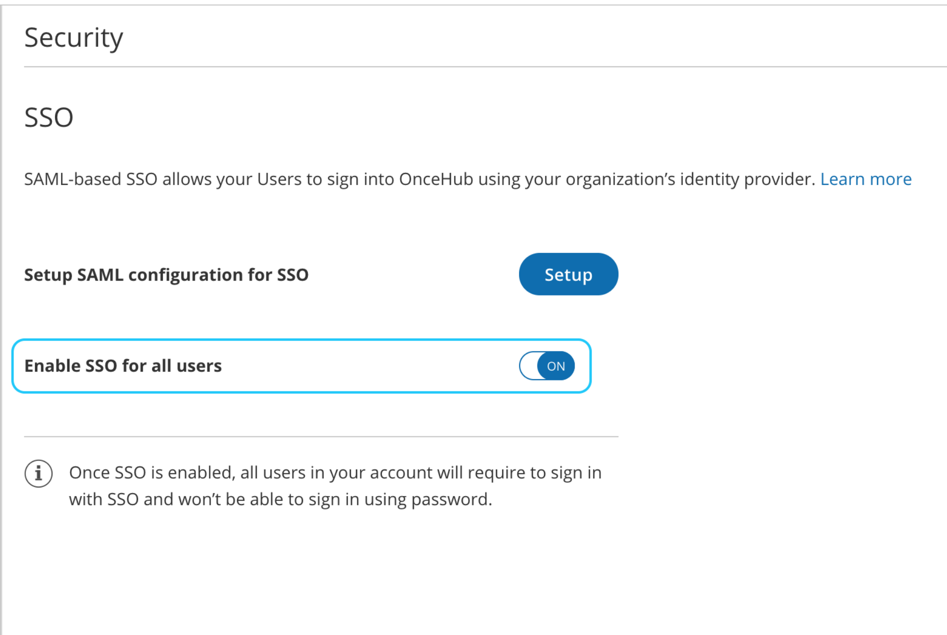

Figure 15: Enable SSO for all users

Note:

If existing Users were already signing into OnceHub using an email and password, they will no longer be able to do so. They will only be able to sign in using SSO.

Configuring SSO with G Suite

Last Modified on Nov 4, 2020

This article provides a step-by-step guide to configuring SSO between OnceHub and G Suite.

Requirements

To configure SSO in your account, you must be a OnceHub Administrator. However, you do not need a product license. Learn more

You must already have an account with G Suite. The person configuring in G Suite must be an administrator with access to the admin portal.

Step-by-step directions

Request access

SSO is intended for accounts with multiple users who take the extra security measure of signing into third-party applications using an identity provider. Please contact us to learn more. OnceHub can enable the SSO functionality in your account manually.

SAML configuration

You can access SAML configuration at OnceHub **Account settings** -> In the lefthand sidebar, select **Security** -> **SSO**.

OnceHub provides specific field values you can copy and configure within G Suite.

1. Create a new SAML app

In G Suite, go to **Apps** -> **SAML apps**.

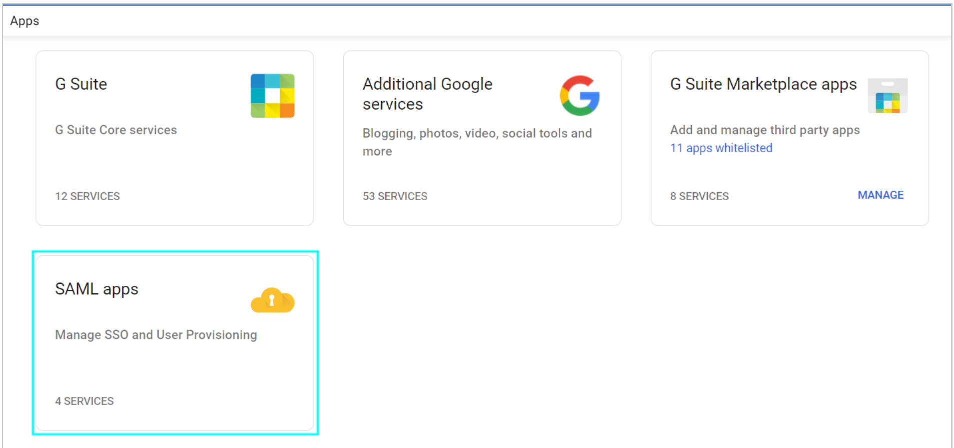

Figure 1: Create new SAML app

On the bottom right, click the **Add +** icon. In the popup, select **Setup my own custom app**.

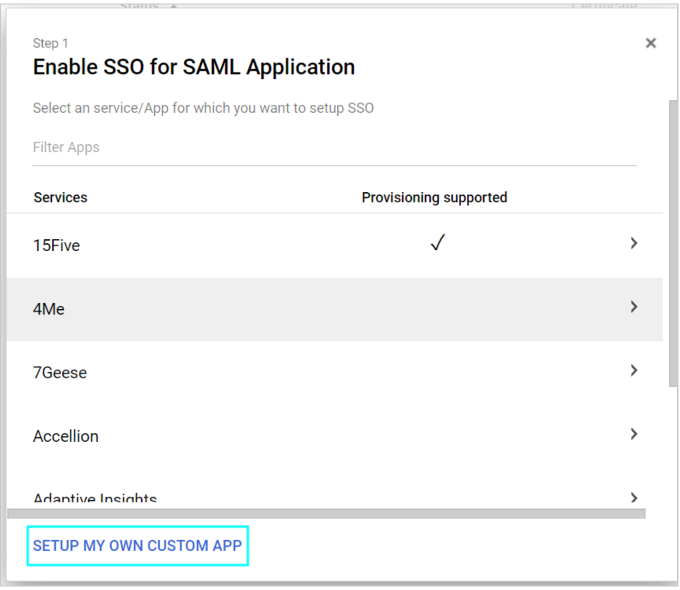

Figure 2: Setup my own custom app

2. Grab information from G Suite

On the **Google IdP Information** step, copy the SSO URL and Entity ID. Paste them into a text document so you can come back to them.

Next, download the **Certificate**. Set these aside for a moment and select **Next** in G Suite.

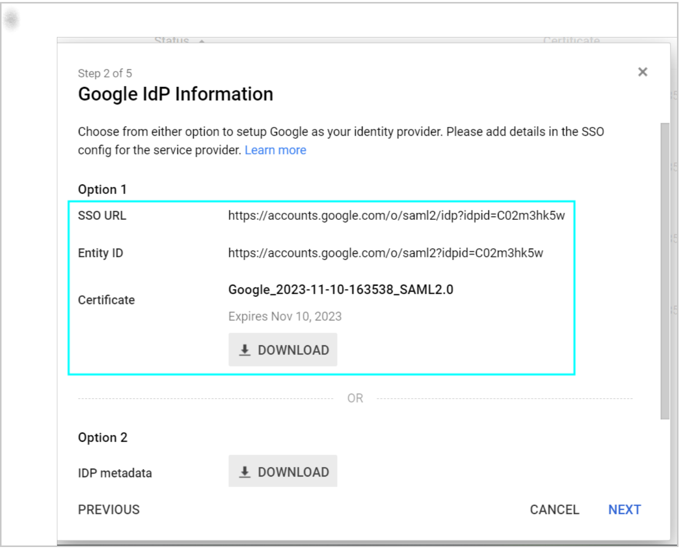

Figure 3: Google IdP Information

3. Basic information

In the **Basic information for your Custom App** step, give the app a name (for instance, OnceHub). When you're satisfied with the basic information, select **Next**.

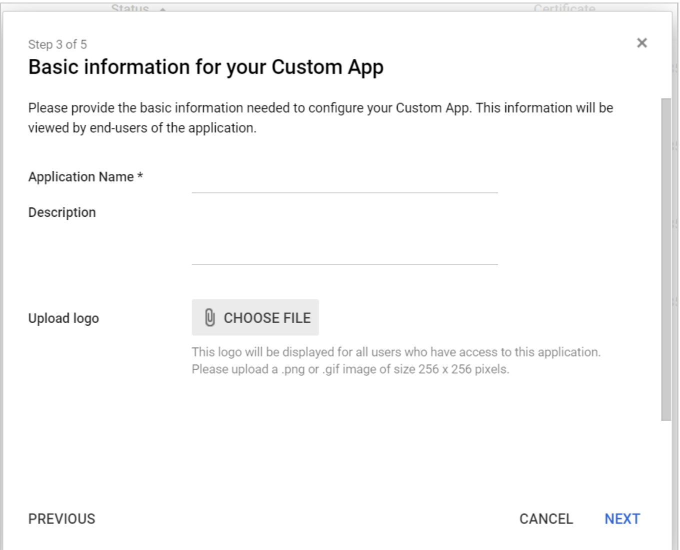

Figure 3: General Settings

3. Service Provider Details from OnceHub

On the **Service Provider Details** step, fill out the settings. You can grab these values in OnceHub, on the **Required by identity provider** step.

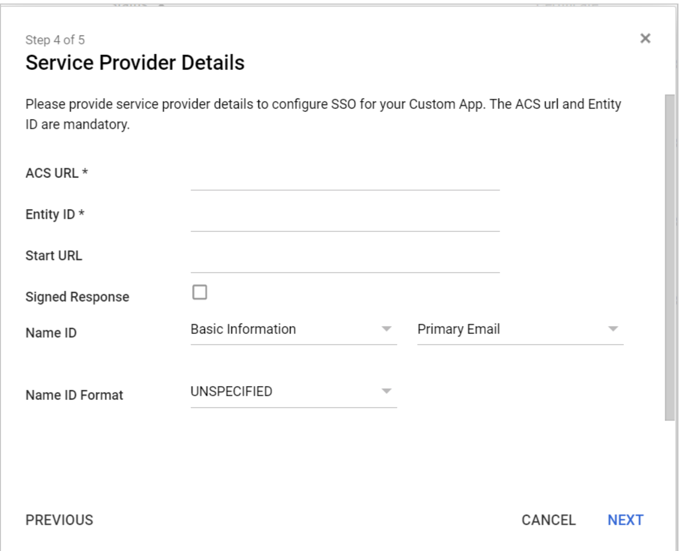

Figure 4: Configure SAML Settings

In G Suite	In OnceHub
Entity ID	Identifier URL
ACS URL	ACS URL
[Not required; G Suite refers to ACS URL for this function]	~~Single sign-on URL~~

4. Attribute mapping

For the **Name ID** field on the same step as above, select **Basic information** and then **Primary Email** (Figure 4).

You can keep the **Name ID Format** on **UNSPECIFIED**.

Once you're ready, click on **Next**. The Attribute Mapping step will display the **Primary Email** field. Add a mapping that maps this to the application attribute **email** (all lower case).

Select **Finish**.

5. Paste G Suite information in OnceHub

Go back to OnceHub and refer to the saved information from the **Google IdP Information** step (step two above). Paste the relevant values in OnceHub

In G Suite	In OnceHub
Entity ID	Entity ID
SSO URL	IDP single sign-on URL
Certificate	Public x509 certificate

Important:

For the Public x509 certificate, include the **-----BEGIN CERTIFICATE-----** and **-----END CERTIFICATE-----** syntax in your selection and paste it all into the OnceHub field.

6. Status in G Suite

Before clicking Verify in OnceHub, go back to G Suite and access the **SAML apps** section again. Make sure the status of the new SAML app is on for all relevant users. This may be **On for everyone** or **On for some** (a specific group you define in G Suite).

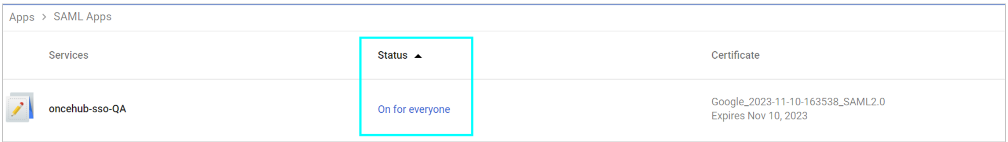

Figure 8: Assign to People

7. Verify

In OnceHub, click **Verify** to confirm that SAML authentication is verified.

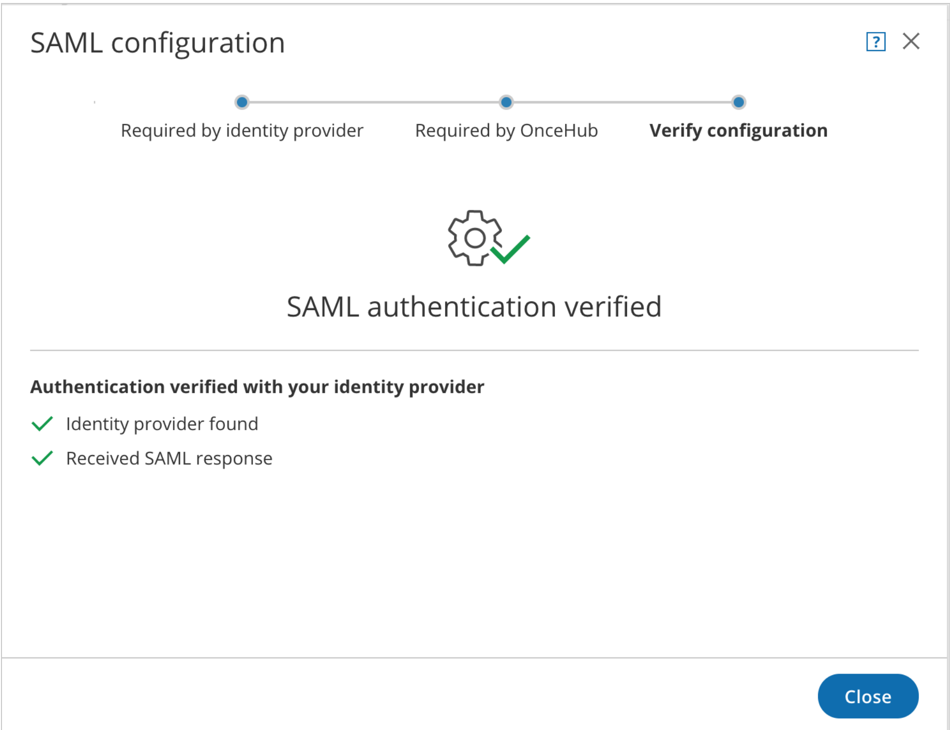

Figure 9: Verify configuration

8. Enable SSO for all users

Once you've verified your SSO configuration, you can select the **Enable SSO for all users** toggle. All Users in your OnceHub account can now access their account using SSO.

Important:

Before you enable the account, make sure all your Users have matching email addresses for their OnceHub User profile and their G Suite profile.

Once SSO is enabled, they **will not** be able to change their OnceHub email.

If their OnceHub email does not match the email in their IDP profile, they **will not** be able to log in.

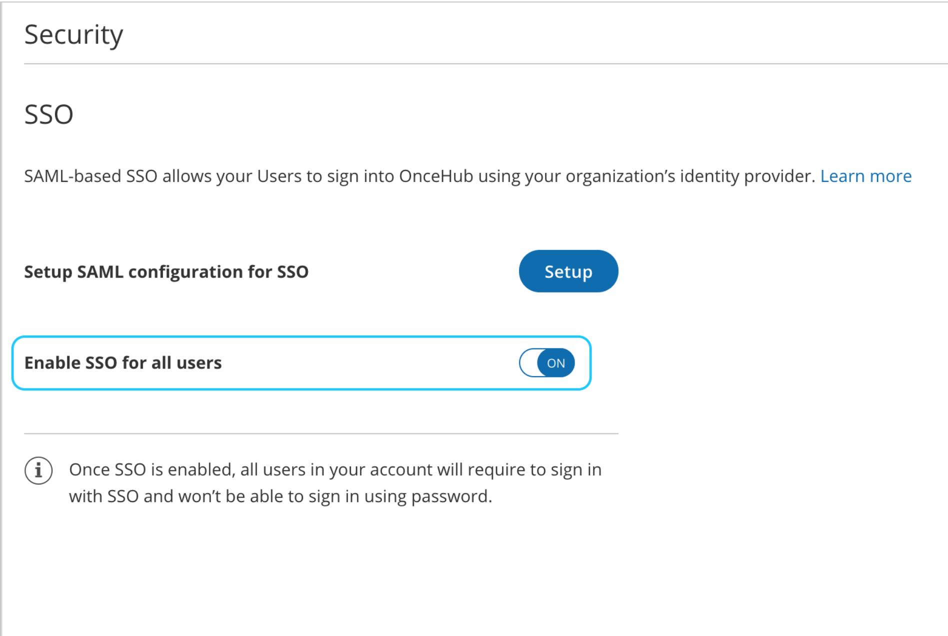

Figure 15: Enable SSO for all users

Note:

If existing Users were already signing into OnceHub using an email and password, they will no longer be able to do so. They will only be able to sign in using SSO.

Configuring SSO with OneLogin

Last Modified on Oct 26, 2020

This article provides a step-by-step guide to configuring SSO between OnceHub and OneLogin.

Requirements

To configure SSO in your account, you must be a OnceHub Administrator. However, you do not need a product license. Learn more

You must already have an account with OneLogin. The person configuring in OneLogin must be an administrator.

Step-by-step directions

Request access

SSO is intended for accounts with multiple users who take the extra security measure of signing into third-party applications using an identity provider. Please contact us to learn more. OnceHub can enable the SSO functionality in your account manually.

SAML configuration

You can access SAML configuration at OnceHub **Account settings** -> In the lefthand sidebar, select **Security** -> **SSO**.

OnceHub provides specific field values you can copy and configure within OneLogin.

1. Add SAML Test Connector (Advanced)

In OneLogin, go to **Administration** -> **Applications**. Search for **SAML Test Connector (Advanced)** and select (making sure to select the SAML 2.0 version).

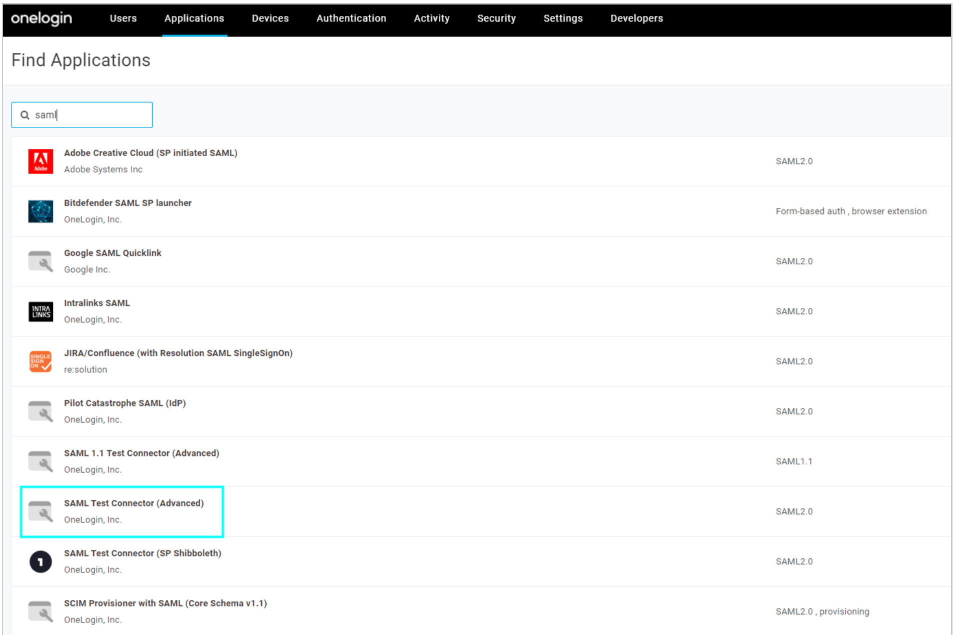

Figure 1: Select SAML Test Connector (Advanced)

2. Configuration

Give the app a name (for instance, OnceHub) and fill out the other settings.

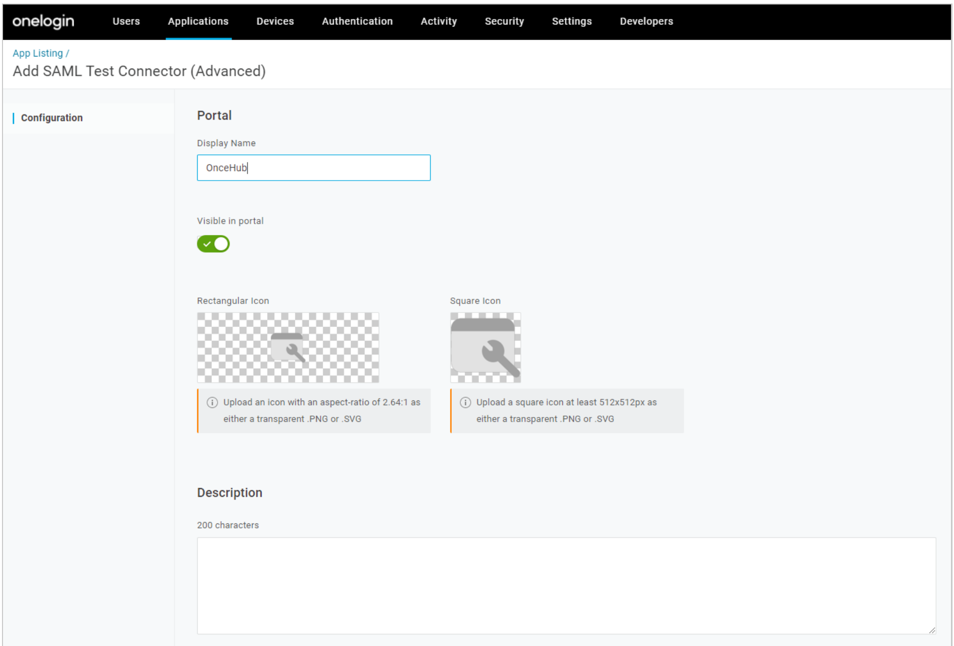

Figure 3: Display Name settings

3. Configuration - Application details

On the **Application details** page, fill out the SAML settings. You can grab these values in OnceHub, on the **Required by identity provider** step.

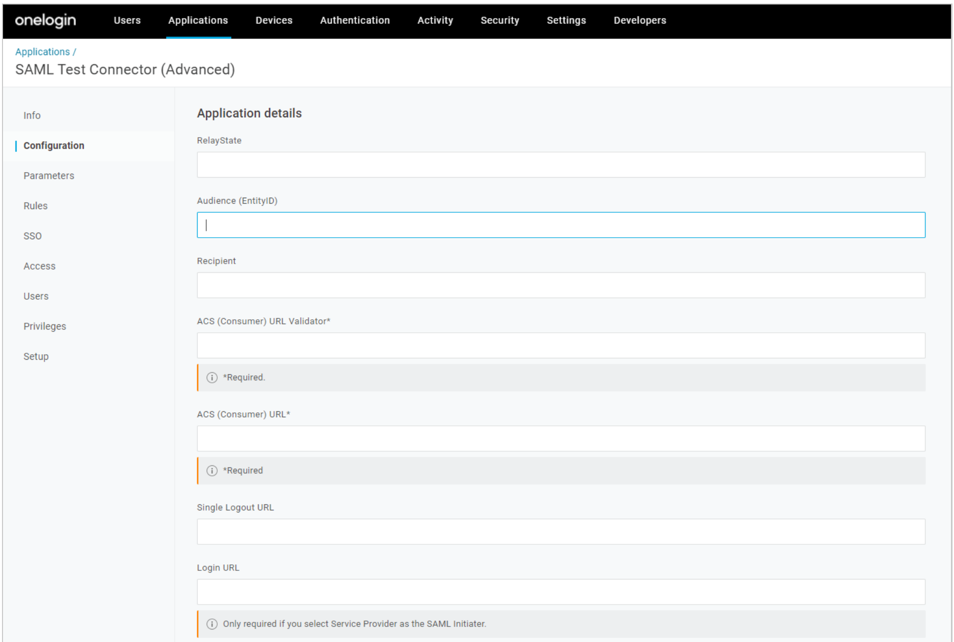

Figure 4: Configure Application details

In OneLogin	In OnceHub
Audience (EntityID)	Identifier URL
ACS (Consumer) URL Validator	ACS URL
ACS (Consumer) URL	ACS URL
[Not required; OneLogin refers to ACS URL for this function]	~~Single sign-on URL~~

These are the only required fields; the rest can be left blank.

4. Parameters

Create a new field by clicking the **+** button. For the **Field name**, use **email** (in lower case). Map this to the **Value** field **Email**. Select **Save**.

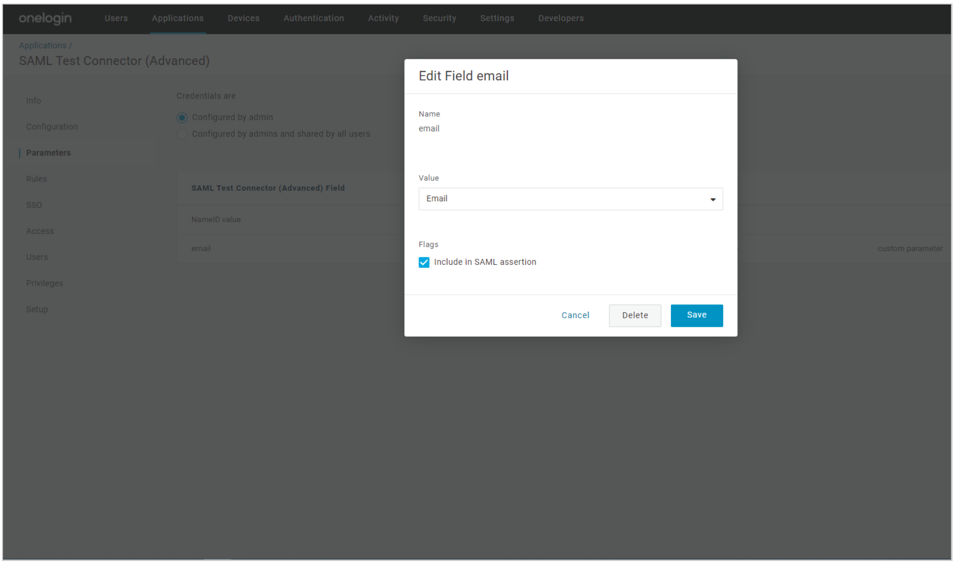

Figure 5: Select Email as the value

5. Grab information from OneLogin and paste in OnceHub

On the **SSO** step, grab the information you will add in OnceHub. Once added, go back to OneLogin before you click **Verify** in OnceHub.

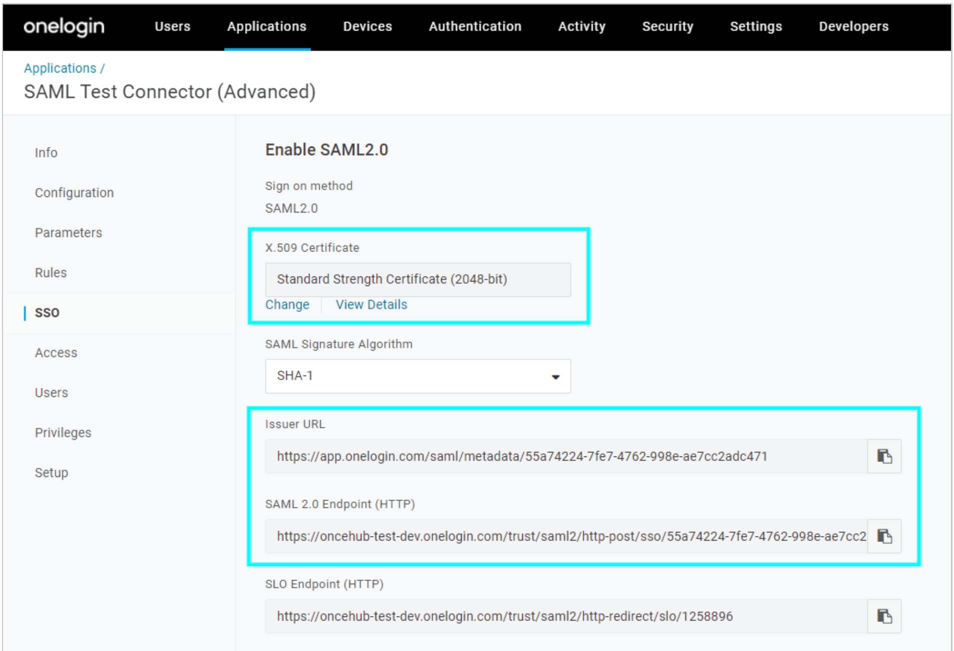

Figure 6:

Enable SAML 2.0 by grabbing information to paste in OnceHub

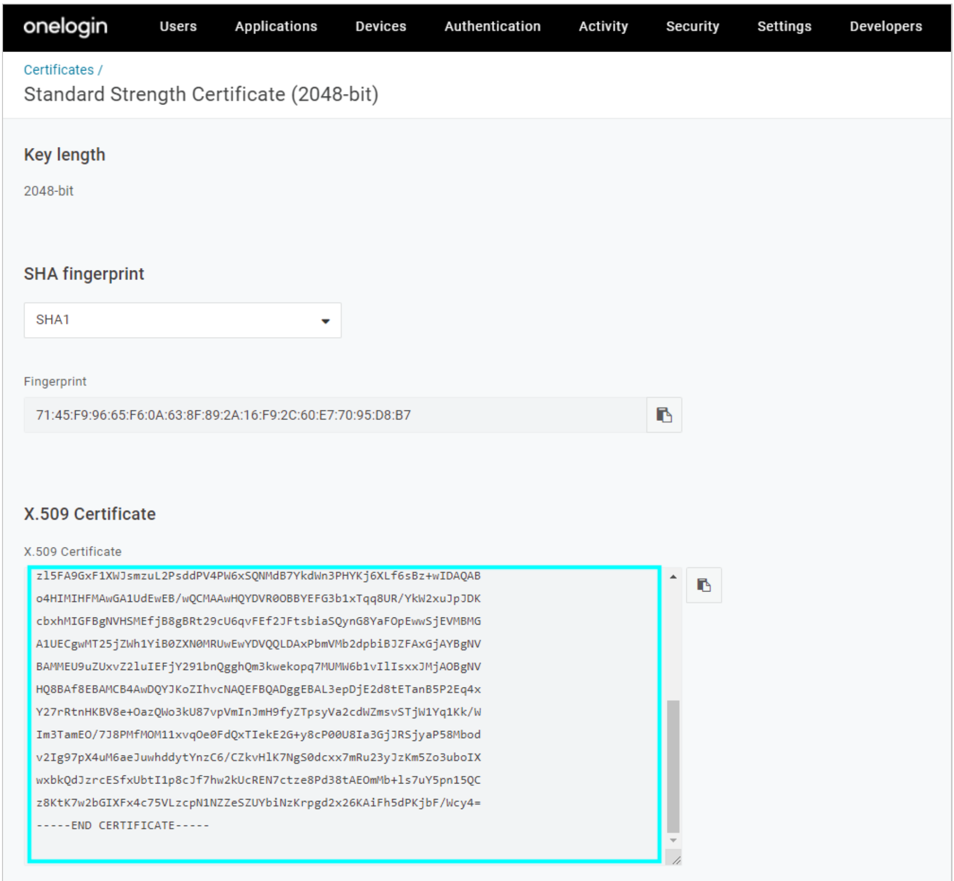

Figure 7: X.509 Certificate

In OneLogin	In OnceHub
Issuer URL	Entity ID
SAML 2.0 Endpoint (HTTP)	IDP single sign-on URL
X.509 Certificate (select **View Details** to copy)	Public x509 certificate

Important:

For the Public x509 certificate, include the **-----BEGIN CERTIFICATE-----** and **-----END CERTIFICATE-----** syntax in your selection and paste it all into the OnceHub field.

6. Add users

On the Users step, add the relevant users in OneLogin to your new app.

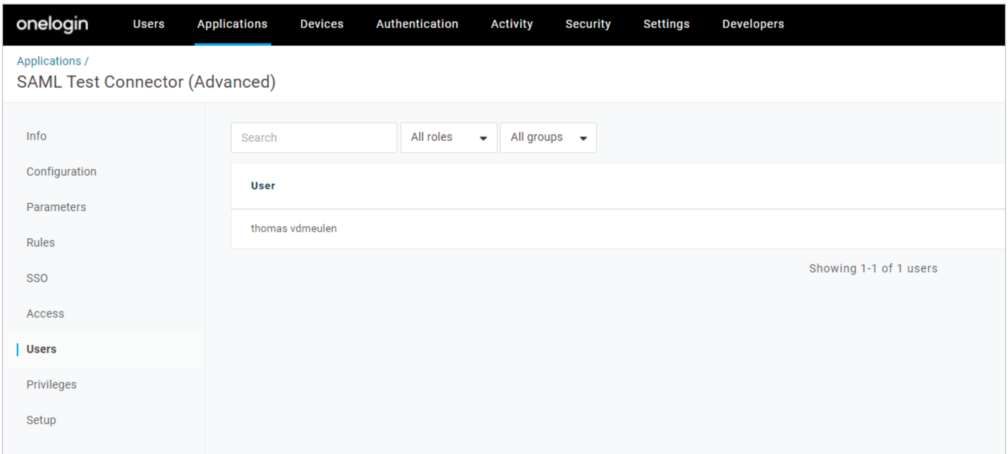

Figure 8: Add users

Follow the rest of the steps in OneLogin to complete setup.

7. Verify

In OnceHub, click **Verify** to confirm that SAML authentication is verified.

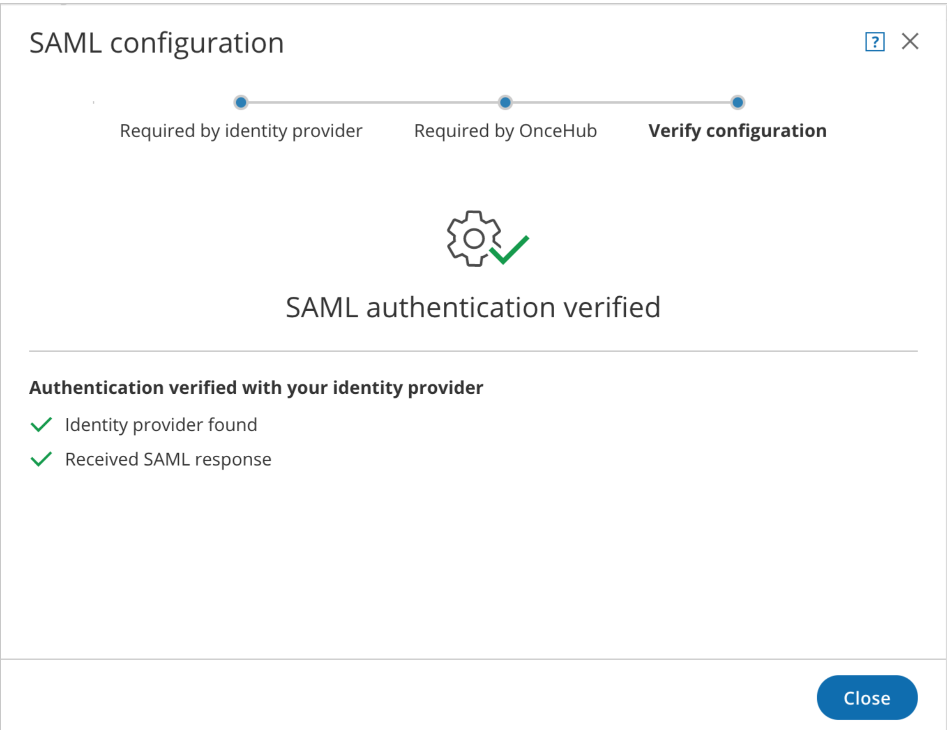

Figure 9: Verify configuration

8. Enable SSO for all users

Once you've verified your SSO configuration, you can select the **Enable SSO for all users** toggle. All Users in your OnceHub account can now access their account using SSO.

Important:

Before you enable the account, make sure all your Users have matching email addresses for their OnceHub User profile and their OneLogin profile.

Once SSO is enabled, they **will not** be able to change their OnceHub email.

If their OnceHub email does not match the email in their IDP profile, they **will not** be able to log in.

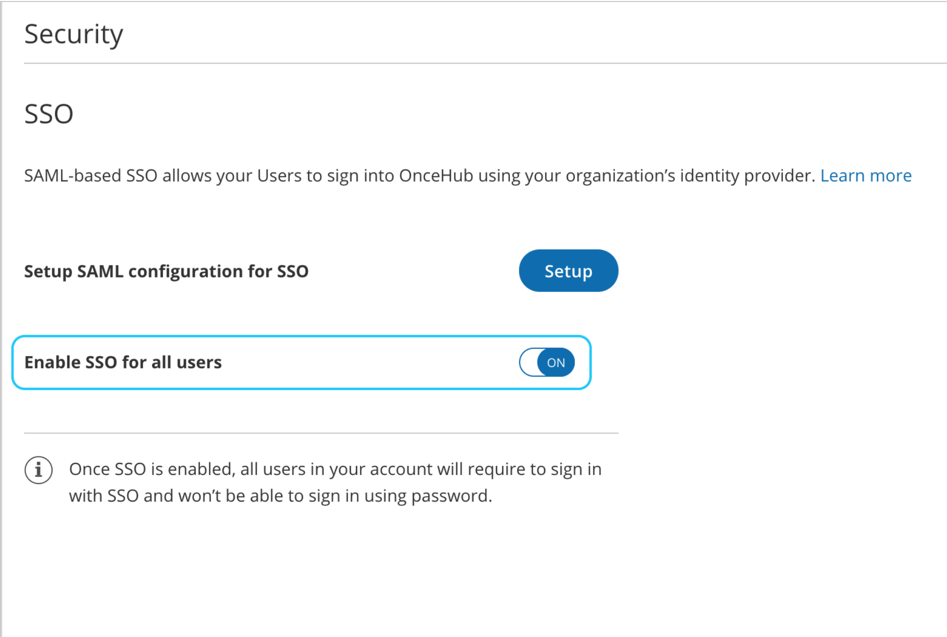

Figure 15: Enable SSO for all users

Note:

If existing Users were already signing into OnceHub using an email and password, they will no longer be able to do so. They will only be able to sign in using SSO.

Contacts in OnceHub

Last Modified on Aug 28, 2024

OnceHub saves customers that schedule meetings with you as contacts.

You can view all information about one of your contacts in the Activity stream, providing you with a full view of information related to each customer or website visitor before taking action.

Each contact has attributes that can be stored in contact fields, which can be customized. You can export all contacts to a CSV file.

How do contacts work in OnceHub?

When a customer books a meeting using Booking pages or a website visitor engages with your chatbot or form, OnceHub creates an activity for them on the Activity screen. OnceHub allows you to see all that contact's activities together, so you'll have a full view of information related to them before taking action.

The contact is identified through their email address, if this is known for them (as it would be for all scheduled bookings and some chatbot conversations and form submissions). OnceHub groups all activities related to that email address together when you go to the three-dots menu for an activity and select **View all activities related to this Customer**.

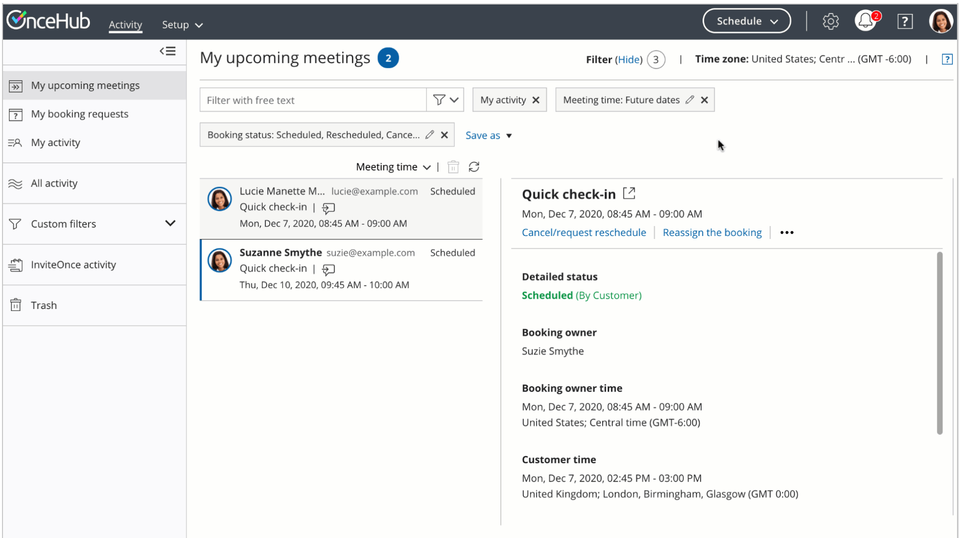

Figure 1: View all activities related to this Customer

In the activity stream, Admins have access to see all contacts in the account. A Member user can view any contacts for which they are the owner.

How to gather contact attributes

Booking pages

When someone books with you, they fill out your booking form. When you create your booking form, you can specify which answers should be mapped to their contact record as saved contact attributes.

Fields mapped by default

Every contact has, at minimum, a first name and email. These two fields are always saved as contact fields. Their mapping cannot be edited.

Other fields are also mapped by default but are optional to include. However, their mapping cannot be edited. For instance, if you opt to use the **Your company** field in your booking form, it will always map to the **Company name** contact field.

Other fields can be mapped to a different contact field, if you prefer.

Booking form field	Mapped to Contact field	Mandatory contact field?	Mapping can be edited?

Your name	First name	Yes	No
Your email	Email address	Yes	No
Your company	Company name	No	No
Your phone	Phone	No	No
Your mobile phone	Mobile phone	No	No

Fields not mapped by default

None of these fields are mandatory and mapping for all can be edited:

- Your company - A second company field that is optional and can be mapped
- Attachment
- Country
- Location
- State
- Terms of service

Custom contact fields

All custom fields in your booking form are optional and entirely flexible for mapping to whichever contact field you prefer.

You will need to create a new contact field before you can map a custom field in your booking form to it. In the top navigation menu, select the gear icon → **Contact fields** → **Add new field** to add a custom contact field.

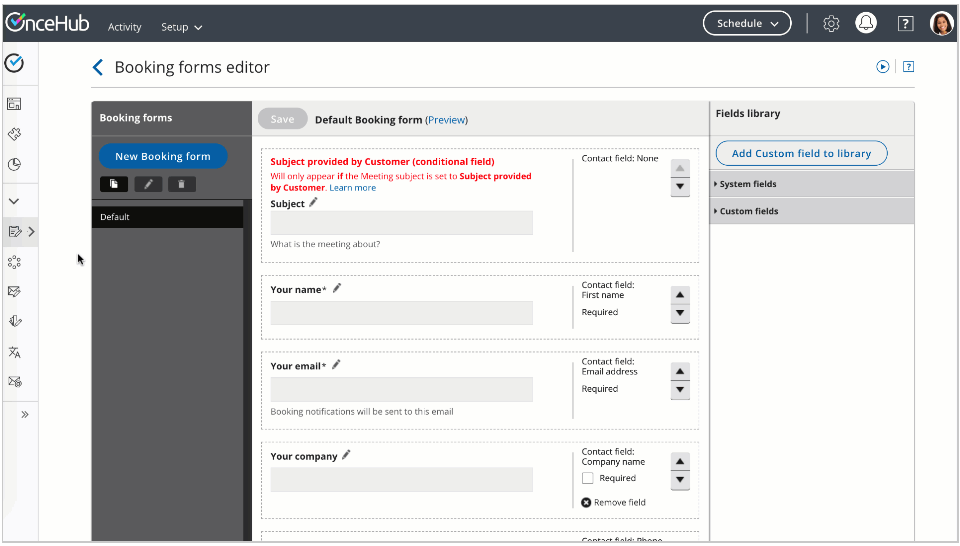

Figure 2: Add new field

Chatbots

Every website visitor who engages with your chatbot has a contact record. This record stores data in fields you've defined in OnceHub, along with system default fields such as name, email, and company.

If their name is unknown because they haven't provided it yet, OnceHub assigns the default contact name **Site visitor**.

Learn more about contact fields using chatbots

Export contacts

To export a CSV file of your contacts, go to the lefthand menu → Contacts icon → Export CSV.

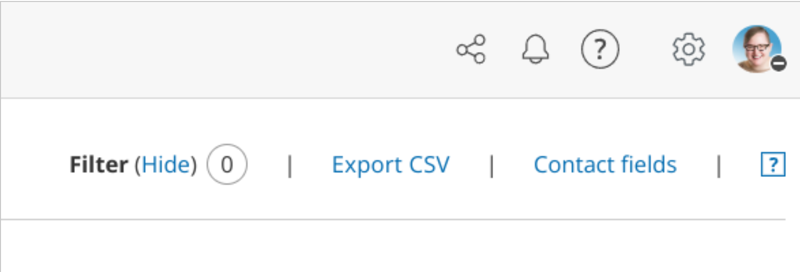

Figure 3: Export CSV

Note:

Only OnceHub administrators can export contacts.

Your OnceHub trial account

Last Modified on Sep 29, 2024

Your 14-day trial helps you understand whether OnceHub is a good fit for your organization. You will have nearly all functionality during the trial. This allows you to explore and utilize the platform's capabilities to meet your scheduling and engagement needs.

What's included

OnceHub's trial period grants you access to a wide range of features. Here's an overview of what to expect:

- **Features**: Many key features, such as scheduling, reminders, video conferencing integration, and calendar integration are fully available. This allows you to test capabilities that align with your business needs. You will also receive 25 SMS credits to test SMS notifications. For more than 25 credits, you must purchase a subscription first.
- **Duration**: The trial lasts for 14 days, giving you ample time to explore the platform, test integrations, and assess how OnceHub can streamline your scheduling and engagement workflows. If you need a bit more time, reach out to us to discuss.
- **Limitations**: While the trial offers broad access, there are some restrictions. The features of the security and compliance add-on are only for paid accounts. This includes email sent from your domain, email notifications BCC'd to an internal address at your organization, single sign-on (SSO), CAPTCHA for booking actions, support for specific industry compliance frameworks, and more.

Setup and support

Getting started with OnceHub is straightforward, thanks to the resources and support available to all trial users.

- **Help center**: OnceHub offers a variety of introductory articles that walk you through setting up your account, creating booking calendars, building chatbots and forms, training an AI chatbot, and more.
- **Support during trial**: Trials for all paid plans include access to a robust support system, including live chat, email support, and detailed help articles. The support team is available to help with any technical questions or issues you encounter as you explore the platform. Contact our support team
- **Purchasing extra support**: For users who want additional guidance, OnceHub offers the option to purchase premium support services, including personalized onboarding sessions and dedicated account managers. These services can help accelerate your setup process and maximize the platform's potential.

End of your trial

At the end of your 14-day trial, your OnceHub account will be paused. To continue using the service, you will need to take action by upgrading your account with a subscription.

- **Billing**: OnceHub provides various billing options tailored to different business sizes and needs. You can review detailed information on pricing and available plans on the pricing page.
- **Upgrade options**: If you decide that OnceHub meets your needs, you can upgrade to a paid plan that fits your organization's requirements. This will unlock any features that may have been restricted during your trial.

Data retention policies

Understanding how your data is managed during and after the trial period is important. Here's what happens to your data:

- **Account trial expires**: If you do not take any action after the trial ends, your account will be paused, and your data will be retained for 180 days from the creation of your account. During this time, you can still purchase a subscription to reactivate your account without losing your information. If you do not purchase a subscription, the data will be deleted 180 days after you created the trial.
- **Account deletion**: If you delete your account, OnceHub will retain your data for a short period according to our data retention policies. However, you will no longer have access to your account or this data. After 30 days, it is deleted from our production databases.

For more details on data management and retention, you can refer to our data privacy policies.

Introduction to Security

Last Modified on Jun 5, 2023

This article describes security processes and features in our application. To learn about all our security processes, visit the OnceHub Trust Center.

OnceHub is a vendor you can trust. Customer trust is earned via the transparency we provide through four guiding principles: Security, Availability, Privacy and Compliance (the OnceHub pillars of trust). By exposing the processes and measures we take to protect your data, we hold ourselves accountable to the highest level. At OnceHub, trust is an ongoing effort to continually evolve, learn and improve in the ever changing security landscape.

We understand that even with the best intentions, security vulnerabilities can exist. We take a multi-tiered approach to reduce the likelihood of a breach, and minimize our exposure to the risks. Through tight controls, good training and secure development we provide the assurance you need to entrust us with your data.

Application security features

As part of our application security we've delivered various security features to meet the requirements of our Customers.

Account security

OnceHub allows you to enforce organizational information security policies through account level security features. You can enforce:

- Two-factor authentication - enable two-factor authentication to add an extra layer of security to your account.
- Password policies - including password length, complexity and expiration.
- Account lockout - enable or disable account lockout and decide how many unsuccessful login attempts result in a lockout.
- Session timeout - enable or disable session timeout and set the timeout time frame.

Learn more about how your sign-in credentials are stored and protected by OnceHub

Third-party integrations security

We understand that third-party systems contain sensitive data you need to protect. Where possible, OnceHub integrations use secure authentication methods such as OAuth 2.0 and data is encrypted at rest using AES with 256 bit keys.

Learn more about how we secure data in our Trust Center

OnceHub Booking page security

The Booking page is a key junction in the data flow into OnceHub. The Booking form automatically operates in a private mode when stored customer data from a database is used to prepopulate the booking. Users are always required to sign in to download secure attachments.

Application security processes and controls

Application security is a core component of the Security Trust pillar. At OnceHub, we consider the security of your data at every stage of the development lifecycle. From concept and design stages to implementation and testing, we make sure that our application keeps your data private and protected.

Privacy and security impact assessments

New features are reviewed by our security manager and executive management. They are assessed for their potential impact on privacy and security. We make sure that settings that potentially expose your data are kept private by default.

Secure development best practices

We work with an experienced development team that is regularly trained on security best practices. We follow OWASP guidelines to ensure we develop secure applications.

Security QA and testing

We take a multi layered approach to testing. Developers perform peer reviews, our QA team performs vulnerability scans and an external team perform periodic penetration testing on the application and infrastructure.

Security best practices

Last Modified on Jun 5, 2023

At OnceHub, the privacy and security of your data matters to us. We employ the latest technologies and have built controls in our platform to ensure that your data is protected. Our security measures are re-enforced when you follow security best practices.

Passwords

If you sign in to OnceHub with an email and password combination, we recommend constructing a strong password. A strong password should:

- Contain 8 or more characters.
- Include a combination of lower case letters and numbers.
- Be changed every 3 - 6 months. Learn more about how to change your password
- Not be used on other systems or accounts.
- Not contain personal information, such as date of birth or name of someone close to you.

A default password policy is set on all OnceHub accounts. The default policy requires that all passwords are at least six characters long and include both letters and numbers.

Custom password policies

Stricter password requirements can be enforced with a custom password policy.

- Password length and complexity can be adjusted.
- Passwords can be set to automatically expire ensuring that they are updated periodically.

Custom password policies are a great way to ensure that password best practices are followed by all Users in your organization. Learn more about Custom password policies

Account lockout

Account lockout provides an additional layer of security for your OnceHub account. It protects against brute force login attempts and automatically suspends account access when multiple failed login attempts have been identified. Learn more about Account lockout policies

Short sessions

Enabling Short sessions protects your OnceHub account from unauthorized access. With Short sessions enabled, an automatic timeout is triggered after a period of inactivity. Learn more about session policies

Least Access principle

When managing multi-user accounts, the Least Access principle ensures that Users see only the data necessary for them to fulfill their role. OnceHub provides various permission levels and User roles to allow for clear and simple management of this.

When using OnceHub, you should ensure that your Users can only access the Booking pages, settings, and meetings that are relevant to them. Where possible, restrict access to Booking pages and use granular-level permissions to prevent editing on Booking page settings that do not require changes. Learn more about Booking page access

Note:

For accounts using a G Suite ID to log in, we authenticate you using the latest OAuth 2.0 technologies. Once you are successfully authenticated by Google, we receive a secure token from them which enables access to your OnceHub account. With Google authentication, securing access to your G Suite account is equivalent to securing your OnceHub account. We recommend enabling 2-step authentication on your G Suite account, as well as following the password policy guidelines recommended by Google.

Password policies

Last Modified on Oct 13, 2022

Using a strong password is an important safety measure that protects your account. Setting a password policy can ensure that Users in your account follow password best practices and organizational guidelines.

You must be a OnceHub Administrator to make changes to password policies. However, you do not need an assigned product license. Learn more

Password policy changes are enforced when the User creates or changes their password. To ensure that new password policies are quickly propagated throughout the account, you should set a seven day expiration time frame. This will force users to comply with your password policy within a week. Then, you can extend the expiration time frame to expire after 6 to 12 months.

In this article, you will learn about customizing the Password policies for your OnceHub account.

Note:

Password policies apply to Users in your OnceHub account that use an email and password combination to login. Passwords for Users with a G Suite login are managed by Google. Learn more about Google password policies

Customizing Password policies

1. In the top navigation menu, click the gear icon → **Security** → **Password policies**.
2. By default, all passwords in OnceHub must be at least six characters long and include both lower case letters and numbers. Adjust your policy to accommodate for stricter requirements and click **Save**.

There are four parameters available to the OnceHub Administrator in the Password policies section:

Password length

This defines the minimum character length for the password. Passwords must contain at least the number of characters defined by the password length. The longer a password, the more secure it is. Enforcing a long password is recommended.

Password complexity

This defines which groups of characters must be used to construct a password. To meet the requirement, a password must contain at least one letter from each of the enabled groups. The “Special characters” group follows best practices and contains the characters recommended by OWASP.

Password expiration

Periodically changing your password is a recommended practice. By default, passwords do not expire in OnceHub. However, enabling password expiration forces Users to change passwords. If a password age is older than the expiration timeframe, your Users will be prompted to select a new password on their next login.

Password history

This section determines whether Users can reuse previous passwords when they change their passwords. Many Users want to reuse the same password for their account over a long period of time, but the longer a password is in use, the less it is secure. If Users are required to change their password, but they can reuse an old password, the effectiveness of a good password policy is greatly reduced. Here you can determine whether Users can reuse previous passwords, and if so, how many times they must change their password before reusing one.

Note :

Users can only edit their own passwords. Administrators cannot edit other passwords of other Users. Learn more about changing your password

Account lockout policies

Last Modified on Oct 13, 2022

Account lockout provides an additional layer of security for your OnceHub account. It protects against brute force login attempts and automatically suspends account access when multiple failed login attempts have been identified.

Locked accounts prevent access to the User application. A locked account is able to accept bookings from Customers and Booking pages function as normal. If a User is locked out of their account, all Administrators receive an email notification advising about the security event.

In this article, you will learn how to customize the Account lockout policies for your OnceHub Account.

Requirements

You must be a OnceHub Administrator to make changes to password policies. However, you do not need an assigned product license. Learn more

Note :

Account lockout applies to all Users on your OnceHub account that use an email and password combination to login. This means if a User signs in through SSO or G Suite, the OnceHub Administrator cannot set account lockout policies for that account.

Account activity for Users with a G Suite login is monitored by Google. Learn more about G Suite activity alerts

Customizing Account lockout policies

1. In the top navigation menu, click the gear icon → **Security** → **Account lockout policies**.
2. By default, account lockout is disabled. Enable the account lockout and define the lockout criteria. Enabling Account lockout is a good security practice. We recommend setting the lockout criteria to five attempts within 30 minutes.
   - **Login attempts allowed** - The number of unsuccessful login attempts required to lock an account.
   - **Lockout timeframe** – The timeframe for counting unsuccessful login attempts.
     The lockout criteria determines the threshold that triggers lockout. Suppose your Account lockout policy is set to allow no more than three attempts in 60 minutes. Three failed login attempts at 09:00 am, 09:30 am and 09:59 am will lockout your account (since all three attempts happened within the lockout timeframe). Three failed login attempts at 09:00 am, 09:30 am and 10:01 am will not lockout the User account (since only two attempts were in the lockout timeframe).
3. Click **Save**.

Note:

When an account is locked, Administrators can unlock all User accounts apart from their own. To unlock a User account, click on your profile image or initials in the top right corner and select **Users**. Select **Unlock account** from the action menu of a specific User. If you are the only Administrator and your account has been locked, please contact us.

Session policies

Last Modified on Oct 13, 2022

OnceHub recommends the implementation of Short sessions. Short sessions are a security feature that protect your OnceHub account from unauthorized access. With Short sessions enabled, an automatic timeout is triggered after a period of inactivity.

By default, OnceHub can automatically keep accounts signed in for up to 14 days. This is a convenience mechanism for Users who typically access their account from home and do not share their devices with other individuals.

If you share your device, or you access your account from a public location, automatic sign-in is not recommended. For example, if you work in an office with heavy footfall and your account remains logged in at an unattended desk, there is a risk that an unauthorized individual could gain access to your computer.

To prevent automatic sign-in, you should enable Short sessions. With Short sessions enabled, your account will automatically timeout after a period of inactivity. We recommend setting the maximum idle session duration to 30 minutes. In this case, any action performed after 30 minutes of inactivity will automatically redirect you to the login page and prompt you for your login details.

In this article, you will learn about customizing the Session policies page for your OnceHub account.

Requirements

You must be a OnceHub Administrator to make changes to password policies. However, you do not need an assigned product license. Learn more

Note:

Session policies are not available for Users signed in via G Suite or SSO.

Customizing Session policies

1. In the top navigation menu, click the gear icon → **Security** → **Session policies**.
2. By default, session timeout is disabled. If a short session duration is part of your organizations information security policy, you can use Short session settings to enforce this for all Users across the account
3. Adjust your policy and click **Save**.

OnceHub Booking page security

Last Modified on Jun 5, 2023

At OnceHub we understand the importance of protecting Customer data. We have taken a comprehensive approach and placed security mechanisms throughout the data lifecycle.

Booking page security protects your data where it is typically created or used. Security mechanisms are built into the core functionality and no action needs to be taken by you to enable them. There are three security controls that protect data on your Booking page:

Encryption in transit (HTTPS)

When new data is collected as part of the Booking process, it needs to be transmitted over public networks to reach our servers. To protect your data, we use encrypted communication via HTTPS connections.

HTTPS is a secure protocol used to transmit data from websites to web servers. HTTPS is the industry standard and is used by military and financial institutions for transmitting sensitive data. You can tell a web page is using HTTPS if there is a lock icon in the browser address bar:

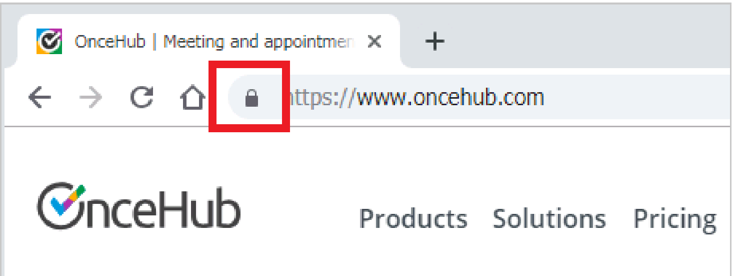

Figure 1: Lock icon in browser address bar

OnceHub is an "HTTPS only" application. OnceHub Booking pages only use HTTPS and automatically redirect to HTTPS if HTTP is manually typed by a User. We support the versions of HTTPS that are accepted across the industry (TLS 1.0 - 1.2).

Bot protection

Some malicious users will use automated tools (bots) to scan public pages and collect information available on the page. To protect our Users we have implemented a blocking system which identifies bots and prevents them from accessing the page in this way.

Privacy protection for stored customer data

We are committed to ensuring that your customer data is kept safe and secure. We have added a layer of security for bookings made with contacts stored in databases, such as your Infusionsoft CRM, Salesforce CRM or your OnceHub app. In these cases, customer information will not be visible on the booking form and we will only indicate that the data is used for making the booking.

Data stored on databases is sensitive and should never be exposed on a public webpage (such as your OnceHub Booking page). To keep your data private, pre-populated Booking forms automatically load in a private mode which prevents data from being displayed. Learn more about pre-populated Booking forms

How your sign-in credentials are stored and protected by OnceHub

Last Modified on Apr 30, 2020

Protecting the confidentiality, integrity, and availability of data processed through our services is a fundamental objective of the OnceHub security program. We employ strong technical safeguards to ensure that data is protected and the risk of exposure is minimized.

Encryption

All data, including sign-in credentials and passwords, are encrypted in transit and at rest using the Transparent Data Encryption service (TDE) provided by Microsoft Azure. TDE uses strong cyphers (AES-256) and the keys are managed by Microsoft Azure Management.

To learn about all our security processes, visit the OnceHub Trust Center.

Cryptographic Hashing

Your OnceHub password is stored in our cloud database using Secure Hash Algorithm 2 (SHA-2), a set of cryptographic hash functions designed by the National Institute of Standards and Technology (NIST) and the National Security Agency (NSA).

Learn more about SHA-2

Third-party integration credentials

When you enter your credentials to connect third-party apps to OnceHub, your password is encrypted with AES-256 (Advanced Encryption Standard) and stored in our cloud database.

Learn more about AES-256 encryption

Security settings

Last Modified on May 31, 2024

Understand all the security settings you can customize for your account.

SSO

Signing in with single sign-on (SSO) is a feature designed specifically for organizations using an identity provider across their organization to regulate signing into all their third-party apps through SSO. This may include identity providers such as:

- Okta
- OneLogin
- Azure
- G Suite

To use SSO to sign into OnceHub, your OnceHub Administrator must have already configured SSO for your account.

To access your OnceHub account, click the **Sign in with SSO** link at the bottom of the OnceHub sign-in page.

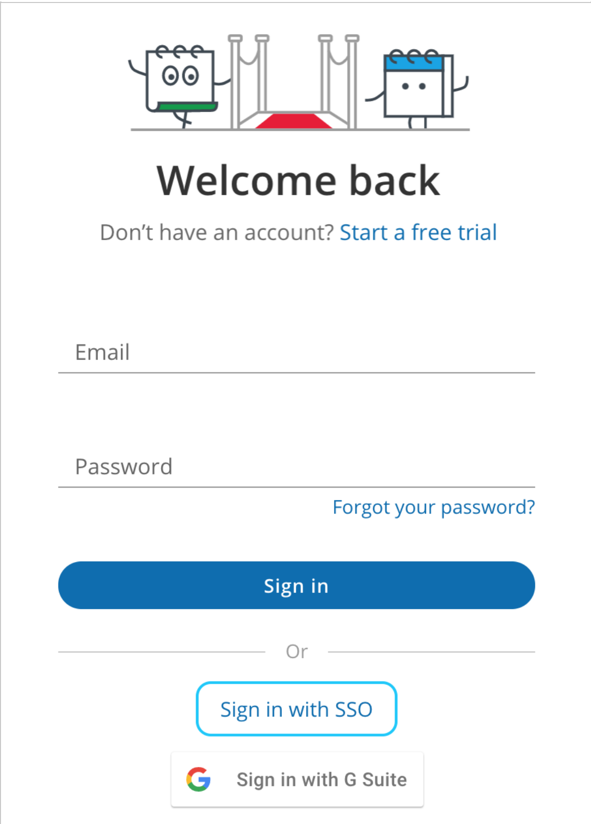

Figure 1: Sign in with SSO

You will provide your email and be redirected to your identity provider. Once authenticated, you'll be returned to your signed-in OnceHub account.

If you're having difficulty signing in, please don't hesitate to contact us for more help.

Password policies

Using a strong password is an important safety measure that protects your account. Setting a password policy can ensure that Users in your account follow password best practices and organizational guidelines.

You must be a OnceHub Administrator to make changes to password policies. However, you do not need an assigned product license. Learn more

Password policy changes are enforced when the User creates or changes their password. To ensure that new password policies are quickly propagated throughout the account, you should set a seven day expiration time frame. This will force users to comply with your password policy within a week. Then, you can extend the expiration time frame to expire after 6 to 12 months.

Note:

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2. By default, all passwords in OnceHub must be at least six characters long and include both lower case letters and numbers. Adjust your policy to accommodate for stricter requirements and click **Save**.

There are four parameters available to an admin:

Password length

This defines the minimum character length for the password. Passwords must contain at least the number of characters defined by the password length. The longer a password, the more secure it is. Enforcing a long password is recommended.

Password complexity

This defines which groups of characters must be used to construct a password. To meet the requirement, a password must contain at least one letter from each of the enabled groups. The special characters group follows best practices and contains the characters recommended by OWASP.

Password expiration

Periodically changing your password is a recommended practice. By default, passwords do not expire in OnceHub. However, enabling password expiration forces Users to change passwords. If a password age is older than the expiration timeframe, your Users will be prompted to select a new password on their next login.

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Session policies

OnceHub recommends the implementation of short sessions, a security feature that protect your account from unauthorized access by triggering an automatic timeout after a period of inactivity.

By default, OnceHub can automatically keep accounts signed in for up to 14 days. This is a convenience mechanism for Users who typically access their account from home and do not share their devices with other individuals.

Requirements

You must be a OnceHub Administrator to make changes to password policies. However, you do not need an assigned product license. Learn more

Note:

Session policies are not available for Users signed in via G Suite or SSO.

Customizing Session policies

1. In the top navigation menu, click the gear icon → **Security** → **Session policies**.
2. By default, session timeout is disabled. If a short session duration is part of your organizations information security policy, you can use Short session settings to enforce this for all Users across the account
3. Adjust your policy and click **Save**.

CAPTCHA

In this section, you can enable CAPTCHA for your account's booking pages. This confirms your page is being booked by a human rather than a bot.

Enabling CAPTCHA adds a strictly necessary cookie named **cf_chl_prog**. This cookie is created and used by Cloudflare to execute Javascript or CAPTCHA challenges, identifying trusted web traffic for your pages. It does not identify the person receiving the cookie on the web application, track them, or store their personal identification details in any way. It is never used beyond the scope of the CAPTCHA challenge.

Learn more: What is a strictly necessary cookie?

OnceHub cookies

Last Modified on Jun 11, 2024

How OnceHub uses cookies with our chatbots, routing forms, booking calendars, and booking pages.

Overview

While engaging with you through OnceHub, two cookies are added to the visitor's browser. They are saved locally to their device.

These cookies are intended to provide a positive experience to your visitors. One allows them to keep their conversation history during an active session. The other manages consent for capturing statistical data about returning visitors.

If the visitor revokes consent through a cookie banner, or cookies are turned off, no cookies or analytics will be generated.

Details

Cookie name	Purpose	Description	Duration
oh_conversation	Keeping track of conversation history	Until the session expires, the visitor can idle or refresh the site without losing their conversation history.	30 minutes
oh_identify	Analytics and anonymous contact identifier	Captures a visitor’s consent for gathering statistical data. Assigns a unique, anonymous contact ID to the visitor until the cookie expires.	90 days

For more details on how we manage and protect your data, see our data privacy section and cookie policy.

GDPR Compliance

Last Modified on Jun 5, 2023

The General Data Protection Regulation (GDPR) is the European Union's new data protection legislation designed to protect the privacy rights of EU individuals. The GDPR aligns fragmented privacy legislation across EU member states and is the most significant regulation to address modern privacy concerns. The regulation replaces the current EU Data Protection Directive (Directive 95/46/EC).

The purpose of the regulation is to strengthen the privacy rights of individuals in regards to how their personal data is being collected, processed, and used.

OnceHub is ready for the changes and here to help our customers comply with the new regulations.

Who does it affect?

The GDPR applies to organizations that process the data of EU individuals (even if the business is not EU-based). GDPR regulated data can be stored outside the EU; however, data exports must meet additional requirements to ensure compliance. For example, there must be assurances that the country of transfer provides adequate protections for the data.

To protect personal data, the GDPR requires organizations to implement operational and technological controls. These controls cover:

1. How data is collected

2. The use of the collected data

3. Storage of the data

4. Individual's rights to their data

GDPR Principles

The GDPR includes key principles for data protection:

- **Fairness and transparency** ensures that data processing is transparent and clearly communicated. For example, the OnceHub privacy policy, which is prominently placed on our website, demonstrates this principle.
- **Purpose limitation** ensures that data is processed for the purpose that was originally intended. For example, at OnceHub, we only use the data we store to provide you with our services. We will never use your data for any other purpose.
- **Data minimization and retention** ensures data is only collected and retained as necessary. For example, OnceHub allows you to configure the data you wish to collect and data is deleted from our databases when you stop using our service.
- **Data security** is a key principle that ensures appropriate technical, administrative and physical safeguards are in place to protect your data from unauthorized access. OnceHub has a comprehensive security program that employs a multi-layered control system, designed to protect your data. For example, we continuously monitor our servers for suspicious activity and use advanced threat detection technologies to secure data.
- **Individual rights** are enforced by the GDPR. An individual has the right to access, retrieve and modify their data. Individuals also have the "right to be forgotten" and for their data to be deleted. OnceHub provides the mechanisms necessary for data subjects and controllers to exercise these rights.

What is OnceHub doing?

The GDPR is a comprehensive regulation and OnceHub is committed to meeting the new requirements. OnceHub is working hard with VeraSafe, privacy experts to ensure we are compliant.

As part of our commitment, we made the Data Processing Addendum (DPA) available to our Customers. The DPA is a contractual obligation to satisfy GDPR requirements such as the breach notification and data security articles.

GDPR regulated businesses must appoint a data privacy officer (DPO) and an EU representative. OnceHub has nominated VeraSafe to represent OnceHub in the EU and we have designated an internal data privacy and security officer to oversee our compliance operations.

We have reviewed our breach notification processes and established controls to ensure data controllers are notified should a privacy incident occur. Notification will be within 72 hours of OnceHub becoming aware of the issue, in line with the GDPR definitions

The DPA will include a reference to the sub-processors used to provide our services. All sub-processors have been reviewed for GDPR compliance and OnceHub will offer data controllers the opportunity to object should a new sub-processor be introduced.

These are just some examples of the efforts we have invested in preparation for the GDPR. We are committed to compliance, and helping our users with their compliance needs.

To learn more about OnceHub's compliance with the GDPR, read our ebook: A practical guide to using OnceHub in a GDPR compliant manner.

Maintaining records of processing under the GDPR

Last Modified on Jun 5, 2023

Under Article 30 of the GDPR, data controllers and data processors are required to maintain appropriate records of processing activities. According to the article, the records that should be kept include:

- The purpose of processing
- A description of the categories of personal data being processed
- A description of the categories of data subjects whose data is being processed
- The contact details for your Data protection officer (if relevant)
- The contact details for your EU representative (if relevant)

Contact information for a Data protection officer (DPO) or an EU representative may not be applicable to your business. For example, some businesses are exempt from the requirement to appoint a DPO. Learn more about whether you need to appoint a DPO.

In the case of an investigation, you may be asked to present this information to the supervisory authority. You should also keep track of any data processors that you have engaged with (such as OnceHub) and ensure that you have the relevant details. You can find our DPO and EU representative details in the OnceHub DPA.

The details should be kept in written form and it is best if they are stored electronically. To ensure compliance, OnceHub requires that you provide and maintain this information in your OnceHub account settings.

Providing OnceHub with records of your processing activities

1. In the top navigation menu, select the gear icon → **Compliance**.
2. Scroll down and fill out the section **Your use of personal data** (Figure 1).

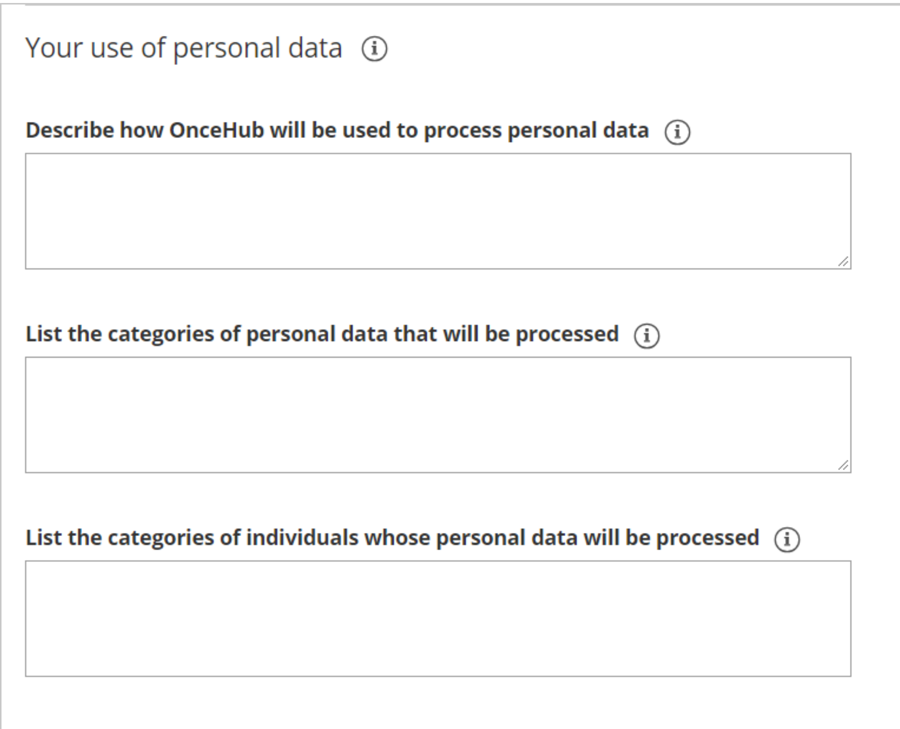

Figure 1: Your use of personal data section

You're all set! You have now provided OnceHub with a record of your processing activities.

Note:

Some of the items may not be required under certain circumstances. For example, if your business is based in the EU, you are not required to have an EU representative. If you have additional questions about Article 30 of the GDPR, contact us for more information.

To learn more about OnceHub's compliance with the GDPR, read our ebook: A practical guide to using OnceHub in a GDPR compliant manner

GDPR data deletion request

Last Modified on Oct 13, 2022

As part of our continuing dedication to data security, customer privacy, and GDPR compliance, OnceHub offers all customers the opportunity to request data deletion for any data associated with their account. Under Article 17 of the GDPR, data subjects have the right to request erasure of personal data if the data is no longer needed or consent has been withdrawn. Learn more about GDPR compliance

Who can request data deletion?

If your customer requests you delete their data, your developers can delete that customer's contact record through the OnceHub API by:

- Requesting a list of contacts ('**List all contacts**')
- Filtering by email
- Once you've identified their ID, you can delete that contact ('**Delete a contact**')

Learn more about deleting contacts through the Developer Center

Next, you can delete their bookings in your Activity stream. If you don't have access to developers, you can start with this step. Learn more

For any other data deletion, any OnceHub User can request data deletion for themselves or their Users, regardless of whether or not they are located in the EU. The request will need to be made from the email address associated with the account and the User will be asked to provide identifying security information to confirm account ownership.

What is the data deletion process?

Once data deletion is requested and account ownership is confirmed, the data deletion request enters our queue. Generally, the data is deleted within 14 calendar days of the initial request. During the deletion process data is securely purged from OnceHub databases and servers. All related backup and log data will be deleted within 30 calendar days. Once data has been deleted it cannot be recovered.

What happens to calendar appointments after activity data is deleted?

The deletion process only removes the data from OnceHub's internal databases and servers. Calendar events in the User's connected calendar will not be modified or deleted.

How will billing and transaction history be affected?

Some monetary amounts shown in the application and invoices will be calculated excluding any amounts related to deleted meetings. This means that the amount shown will not reflect the true amount debited/credited. This applies to the following:

- Monthly sum of Paypal transaction fees: In the top navigation menu, click on the gear icon → **Billing → Transactions**.
- Revenue, Amount received, and Amount refunded: Hover over the lefthand menu and go to the Booking pages icon → In the lefthand side menu, select **Reports** → **Revenue reports**.

How can I request data deletion?

You can submit a data deletion request request in our Trust Center. Please include as much information as possible regarding which data you would like to be deleted. The request will be escalated to the proper team for evaluation and processing. We will reach out every step of the way to keep you updated on the deletion progress.

How can I learn more about OnceHub security and compliance?

To learn more about OnceHub's compliance with the GDPR, read our practical guide to using OnceHub in a GDPR compliant manner or visit our Trust Center.

Data protection officer and EU representative

Last Modified on Oct 13, 2022

Organizations that process data, regardless of whether they are located in the EU, may need to appoint a Data protection officer to monitor internal compliance with the GDPR. Additionally, organizations that are located outside of the EU and are regulated by the GDPR need to appoint an EU representative.

Data protection officer

The GDPR outlines three cases in which controllers need a DPO:

1. The controller is in the public sector

2. The controller regularly or systematically monitors data on a large scale

3. The controller processes sensitive data on a large scale (Article 37).

Having a OnceHub account does not necessarily mean that your organization needs to appoint a DPO. You should examine your organization's core activities to determine whether you meet one of the three cases that would require an appointment of a DPO. That said, appointing a DPO could be very beneficial to your business even if it is not required. As an impartial party, a DPO can help your organization ensure all processing activities are conducted in a GDPR compliant manner. Your DPO can either be an employee of your organization, or be retained as a contracted service.

Do organizations using OnceHub need a DPO?

If your organization is not located in the EU, the GDPR requires that you appoint an EU representative to ensure compliance and represent your organization to the supervisory authority in the EU member states. Your organization may need to appoint an EU representative if you process data on a large scale and are in the private sector (Article 27).

EU representative

The contact details of your DPO and EU representative must be readily available to data subjects, processors and the relevant supervisory authority. To ensure compliance, OnceHub requires that you provide this information in your account settings.

Providing contacts to OnceHub

Steps to add contact information about your DPO and EU representative to your OnceHub account

To provide OnceHub with the contact details of your DPO and EU representative, follow these steps:

1. Sign in to your OnceHub Administrator account. In the top navigation menu, select the gear icon → **Compliance**.

2. Fill in the information regarding your DPO and EU representative.

You're all set! This information can be edited at any time.

Establishing a lawful basis for processing under the GDPR

Last Modified on Jun 5, 2023

Under Article 6 of the GDPR, controllers must have a lawful basis for processing data. There are several methods for establishing a lawful basis for processing under the GDPR. The basis that you use will depend on your use case. With scheduling, establishing a lawful basis for processing depends on who initiates the interaction and what data you require:

- **Scheduling under a generic configuration:** When a Customer initiates scheduling by navigating to your booking page to schedule a meeting.
- **Personalized scheduling:** When you initiate scheduling by sending a personalized link to a prospect or Customer
- **Collection of sensitive data**: When you require sensitive data from Customers during the scheduling process

Scheduling under a generic configuration

This scenario occurs when a Customer schedules from a booking page with a generic configuration. This means that the Customer is not identified in advance, and is therefore required to input their name and email in order to schedule the meeting. This is only relevant if you are using OnceHub. Under the GDPR, you can process information if it is necessary to fulfill a business obligation to a prospect or Customer. In this scenario, when a prospect or Customer inputs their information to schedule a meeting, you need to process their information to fulfill your business obligation. For most organizations, this should be enough to ensure a lawful basis for processing information.

Personalized scheduling

Personalized scheduling is when you input the information of a specific prospect or Customer who you are scheduling with. With OnceHub, you may personalize scheduling by sending personalized links to prospects or Customers. In this scenario, Customer data is pulled from Salesforce, Infusionsoft, or URL parameters. With personalized scheduling, information is processed by OnceHub without any direct input or consent from Customers. While your organization may have a lawful basis for processing this data via other sources, it is recommended that you ensure that you have a basis for processing the information via OnceHub.

Collection of sensitive data

If you are using OnceHub, and require Customers to input sensitive data, it is recommended that you obtain explicit consent at the time of scheduling. This most likely applies to organizations in the healthcare industry, but other organizations may be affected as well. Data that is considered sensitive includes any information related to racial or ethnic origin, political opinions, religious or philosophical beliefs, trade union memberships, genetic or biometric data, health information, or a person's sex life or sexual orientation. Learn more about collecting consent from your data subjects

To learn more about OnceHub's compliance with the GDPR, read our ebook: A practical guide to using OnceHub in a GDPR compliant manner

Collecting consent for processing under the GDPR

Last Modified on Jun 5, 2023

The General Data Protection Regulation (GDPR) requires organizations to establish a lawful basis for processing data. A lawful basis for processing means that your organization has a legal right for collecting, storing, or accessing data belonging to a specific person. Often, a lawful basis for processing relies on consent from the Customer. With online scheduling, you may or may not need to obtain consent from Customers who book with you online.

Scheduling is customarily initiated by Customers. By this nature alone, you may not need consent to process information. However, if your organization processes sensitive data, it is recommended that you obtain explicit consent at the time of scheduling. This most likely applies to organizations in the healthcare industry, but other organizations may be affected as well. Data that is considered sensitive includes any information related to racial or ethnic origin, political opinions, religious or philosophical beliefs, trade union memberships, genetic or biometric data, health information, or a person's sex life or sexual orientation. Learn more about establishing a lawful basis for processing

Obtaining consent

The GDPR defines consent as "freely given, specific, informed, and unambiguous indication of the data subject's wishes by which he or she, by a statement or by a clear affirmative action, signifies agreement to the processing of personal data relating to him or her." Controllers that process on the basis of consent must clearly request consent and enable data subjects to withdraw consent at any time. The GDPR also states that if your request for consent occurs in the context of other matters, you should ensure that the request for consent is distinguishable from the other matters.

In order to obtain clear consent for OnceHub to process the data, it is recommended that you add a field in your OnceHub Booking form to request consent (See Figure 1).

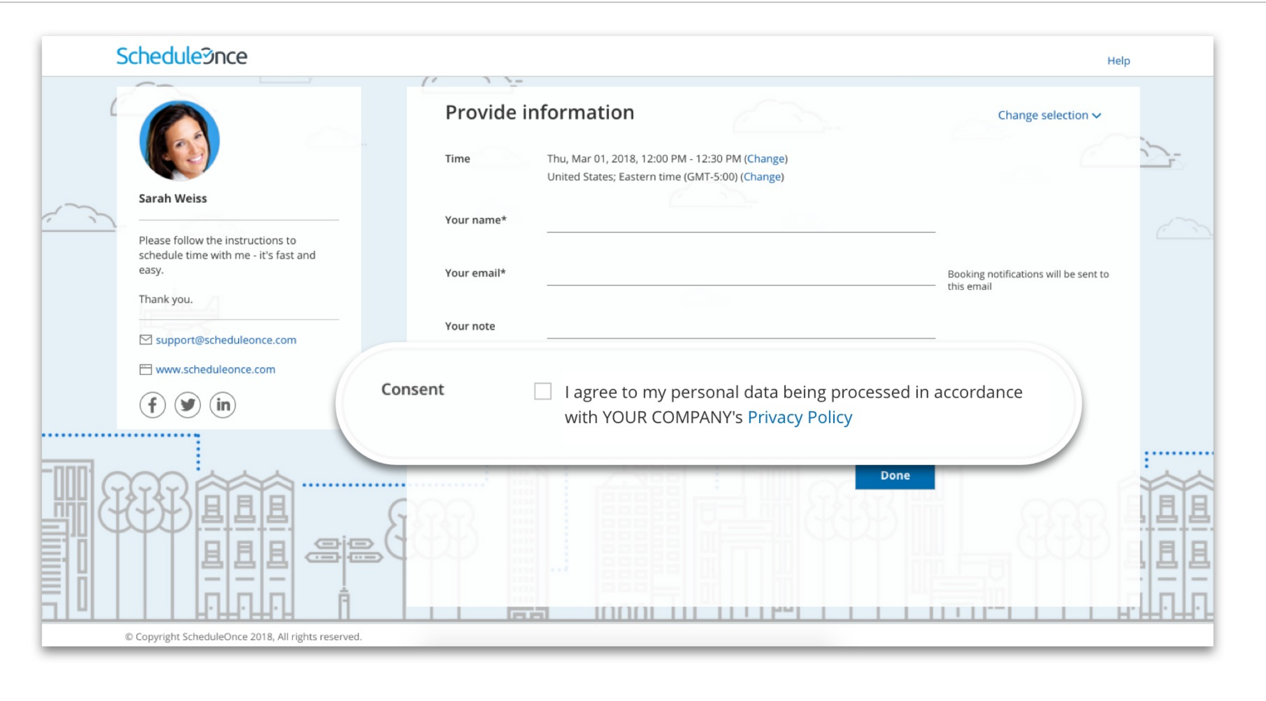

Figure 1: Consent requested in the Booking form

How to add a consent field to your Booking form

1. Go to the Booking forms editor and click **Add Custom field to library** (See Figure 2).

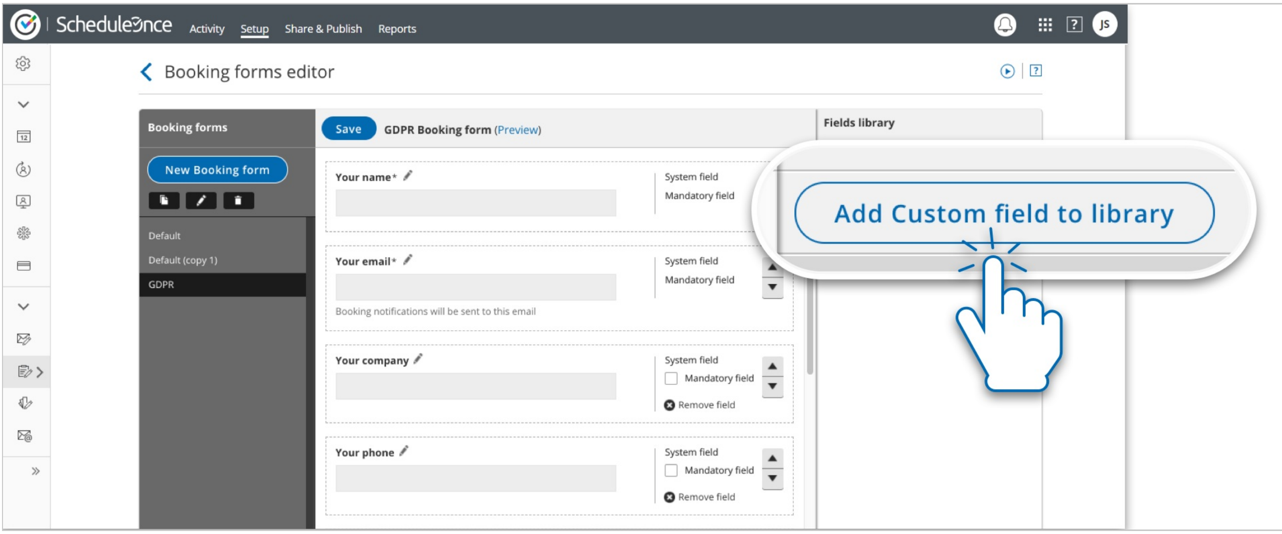

Figure 2: The Booking forms editor

2. Create the Custom field by selecting the **Field type**, **Field name**, **Field title** and **Option**. We recommend using a Checkbox as the Field type, and creating one option allowing users to provide consent (See Figure 3).

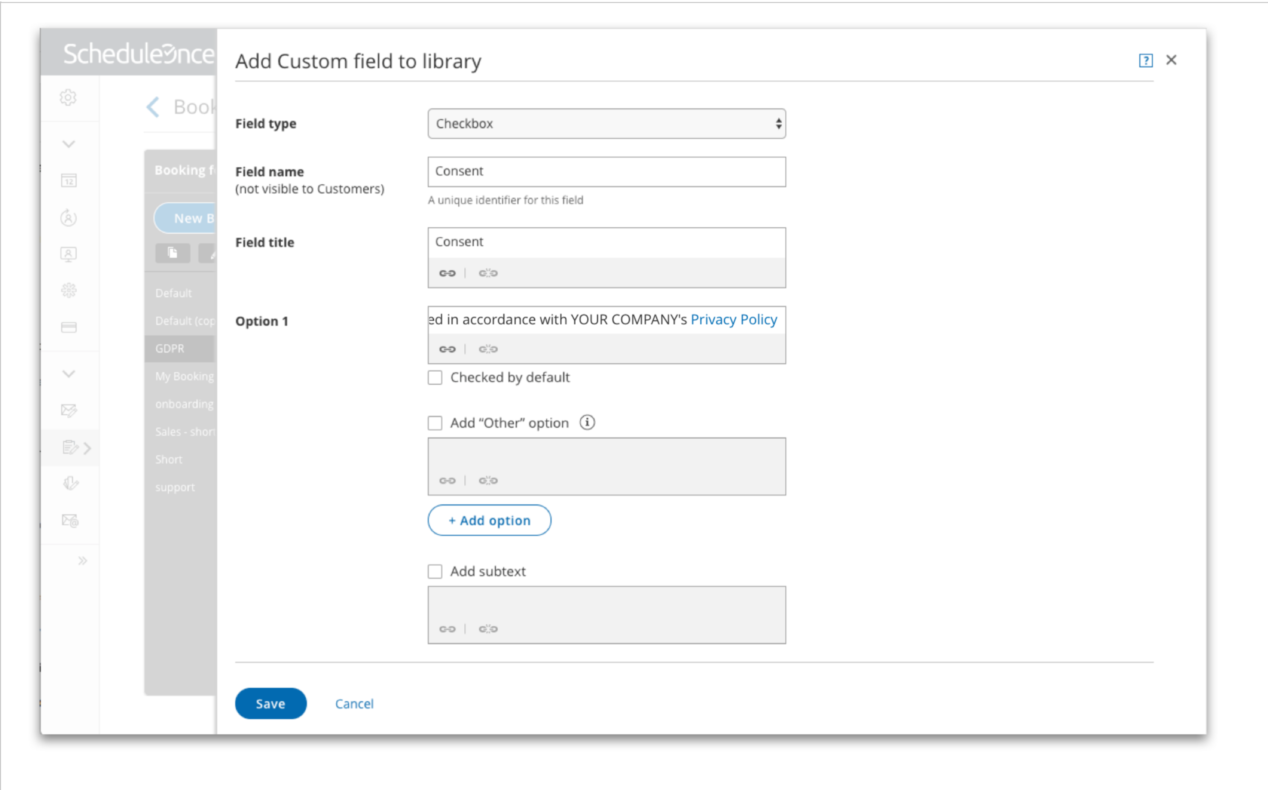

Figure 3: Add Custom field to library

3. When creating your custom field, we recommend linking to your organization's privacy policy. This ensures your Customers understand the processing activities to which they are agreeing. To link to the field, highlight the words you want to link and select the link icon (See Figure 4).

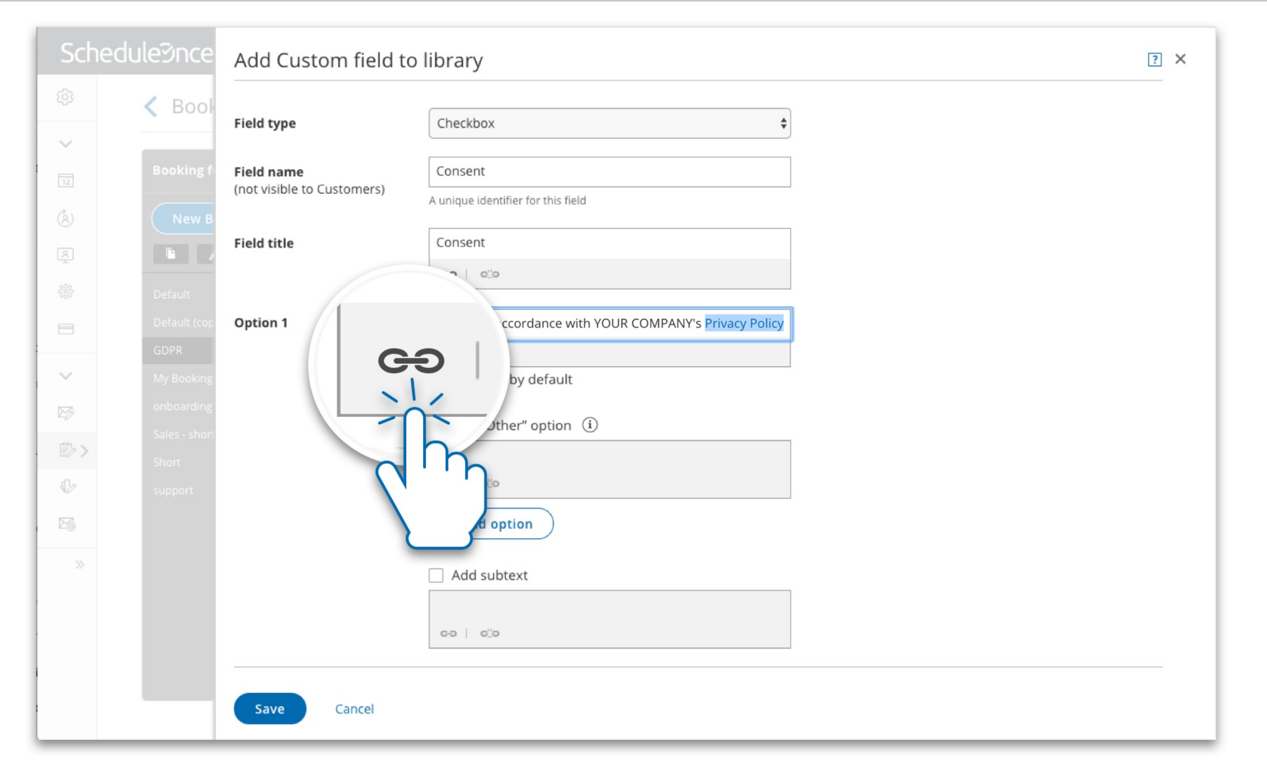

Figure 4: Link to your company's privacy policy

4. Input the link to your privacy policy and press **Save**.

5. Once you have created the field, add it to your Booking form by locating the field in the custom fields library and clicking the arrow to add it to the form (See Figure 5).

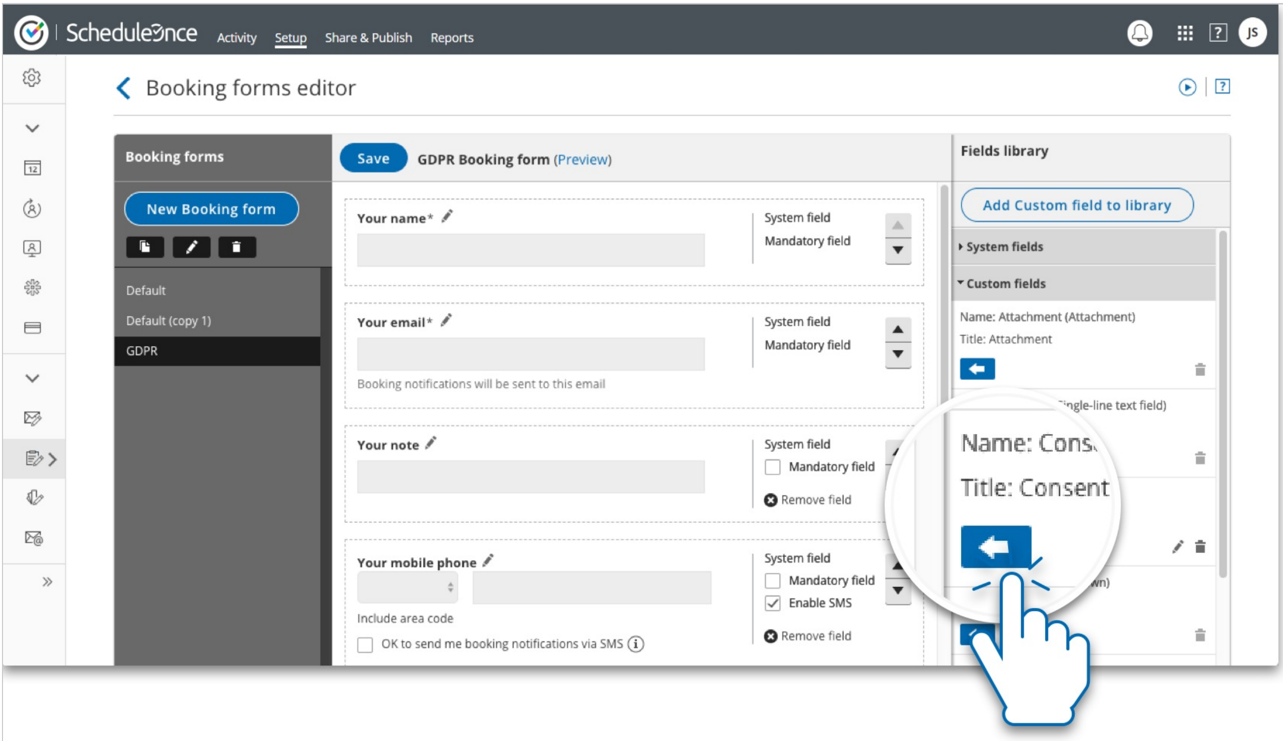

Figure 5: Add the field to the booking form

6. Next, you can determine the position of the field and whether or not it will be mandatory for Customers to check. It is recommended that this field be mandatory (See Figure 6).

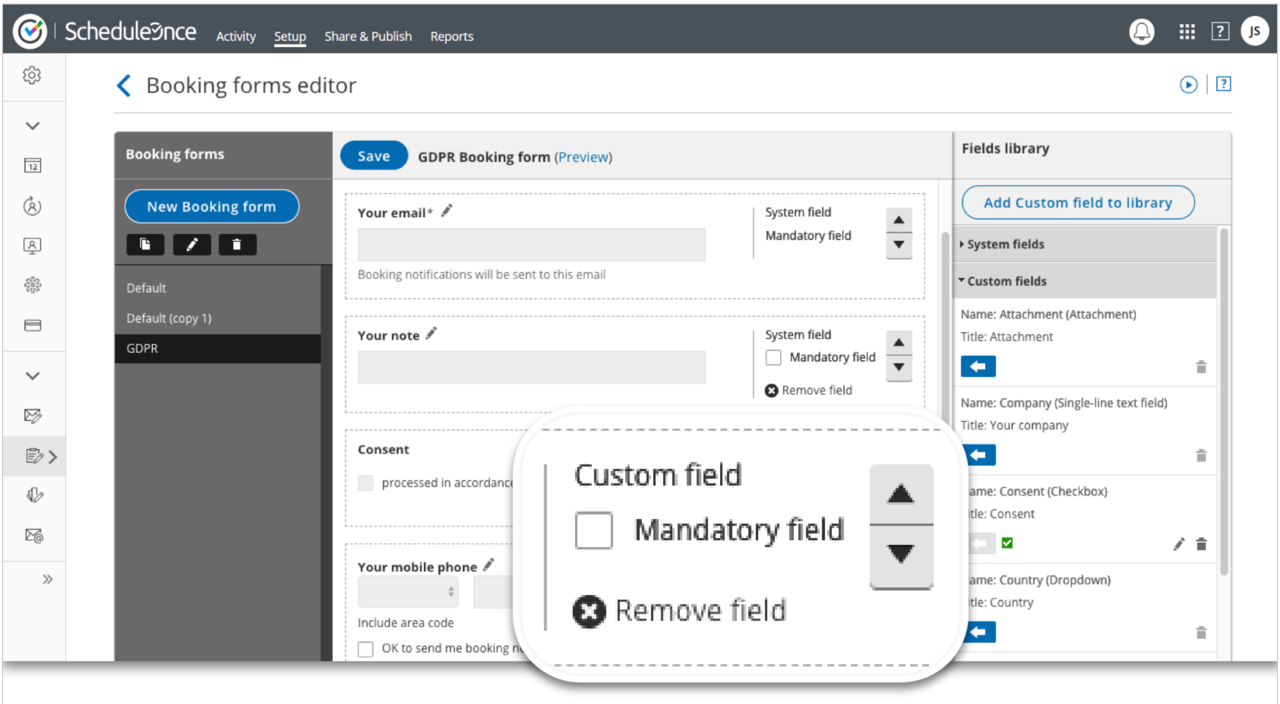

Figure 6: Determine the position and whether the field is mandatory

You are all set! Your Booking form now requests consent for processing data. Be sure to attach this Booking form to the relevant Booking pages or Event types. Learn more about adding the Booking form to your Booking page and Event types

Securing your account according to the GDPR

Last Modified on Jun 5, 2023

Data protection by design and default require controllers to ensure the security of their OnceHub accounts. By default, OnceHub requires Users to use a secure password with at least six characters, including numbers and letters. In addition to our default settings, OnceHub also allows Users to set custom security policies such as stricter password policies, account lockout and short sessions. These additional security policies ensure that you are protecting your account to the highest degree possible.

To update security settings, you must be an Administrator. However, you do not need an assigned product license. Learn more

Configure security settings for your OnceHub account

1. In your OnceHub Administrator account, in the top navigation menu, click the gear icon → **Security** → **Password policies**.

2. Define your password policy. You can set a minimum length, complexity, expiration period, and whether Users can reuse their previous passwords. When finished, press **Save**.

3. Click on the Account lockout policies section (see Figure 2). Click to enable Account lockout. This protects against brute force login attempts and automatically suspends account access when multiple failed login attempts have been identified. Select the number of times a User can unsuccessfully try to login within a specific time frame. When finished, press **Save**.

4. Click on the Session policies section (See Figure 3). Click to enable Short sessions. This setting will automatically sign out Users after a specific period of inactivity. Define the period of time until Users are signed out. When finished, press **Save**.

You're all set! You have now set up custom security policies to protect your OnceHub account. Learn more about security at OnceHub

To learn more about OnceHubs compliance with the GDPR, read our ebook: A practical guide to using OnceHub in a GDPR compliant manner

Data minimization under the GDPR

Last Modified on Jun 5, 2023

Data minimization is a key GDPR principle. Article 5 of the GDPR states that data collection should be adequate, relevant, and limited to what is necessary in relation to the purpose of processing.

The GDPR lays out two principles regarding how organizations should ensure data protection when determining their processes for collecting and storing information:

1. **Data protection by design** states that controllers should "implement appropriate technical and organisational measures" and "integrate the necessary safeguards into the processing." Controllers should consider data protection both when designing procedures to process information, and at the time of the processing itself (Article 25).
2. **Data protection by default** states that controllers should ensure that "by default, only personal data which are necessary for each specific purpose of the processing are processed." This applies to the amount of personal data collected, the extent of the processing, the period of storage, and the accessibility of the data (Article 25).

What data is required to schedule a meeting?

To uphold the principles of data protection by design and default, you should consider what is the minimum data you require to schedule meetings.

	OnceHub
Name and Email address	This information is required in order for Customers to receive confirmation of their booking.
Phone number for sending SMS	It is recommended that this field be optional, allowing individuals to decide whether or not they want to receive SMS notifications.
Information required for providing your service	Depending on the purpose of your meetings, you may require specific information from individuals to ensure you are prepared for your meeting. Only data that is absolutely necessary for conducting a meeting should be collected.

With OnceHub, you do not have the Customer's details and therefore require them to fill out a form. This form can be customized to collect specific information from Customers. When customizing booking forms, you should consider compliance with the GDPR.

Follow these steps to create custom booking forms with OnceHub:

Steps to create a custom booking form in OnceHub

1. Go to the Booking forms editor in your account by expanding the left sidebar and selecting the **Booking forms editor** (see Figure 1).

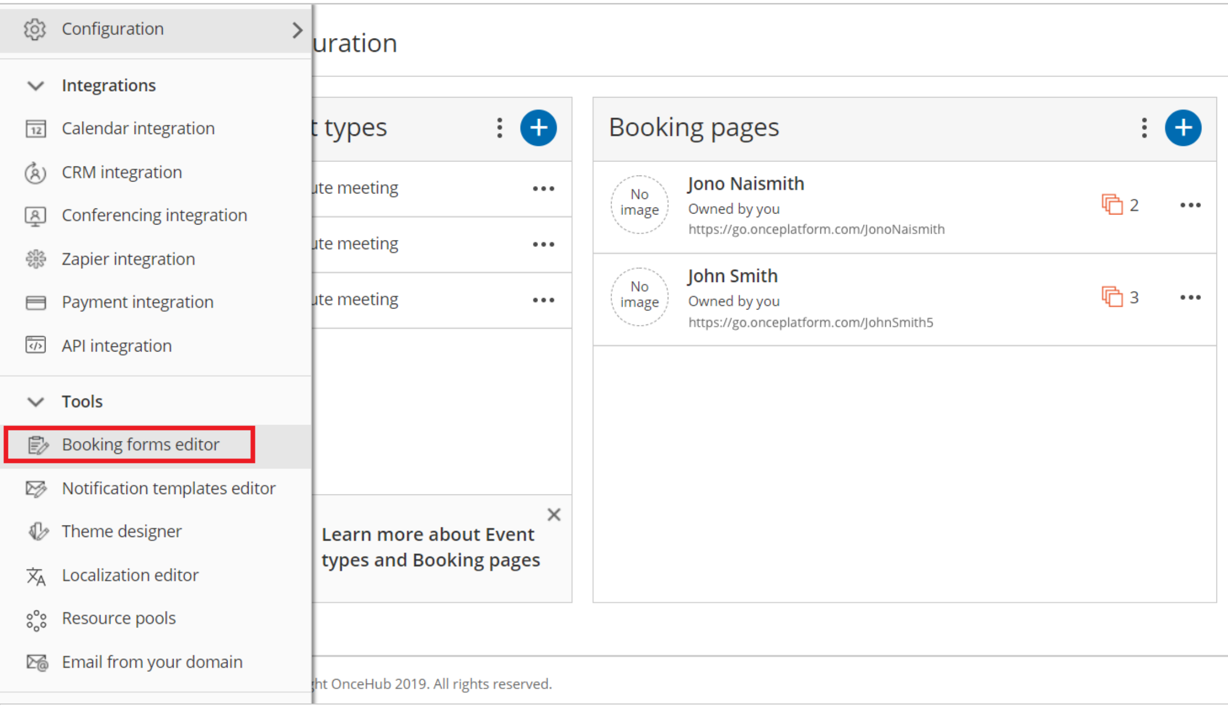

Figure 1: The Booking forms editor in the left sidebar

2. Using the editor, you can determine which fields your customers will need to fill out in order to book a meeting with you (See Figure 2).

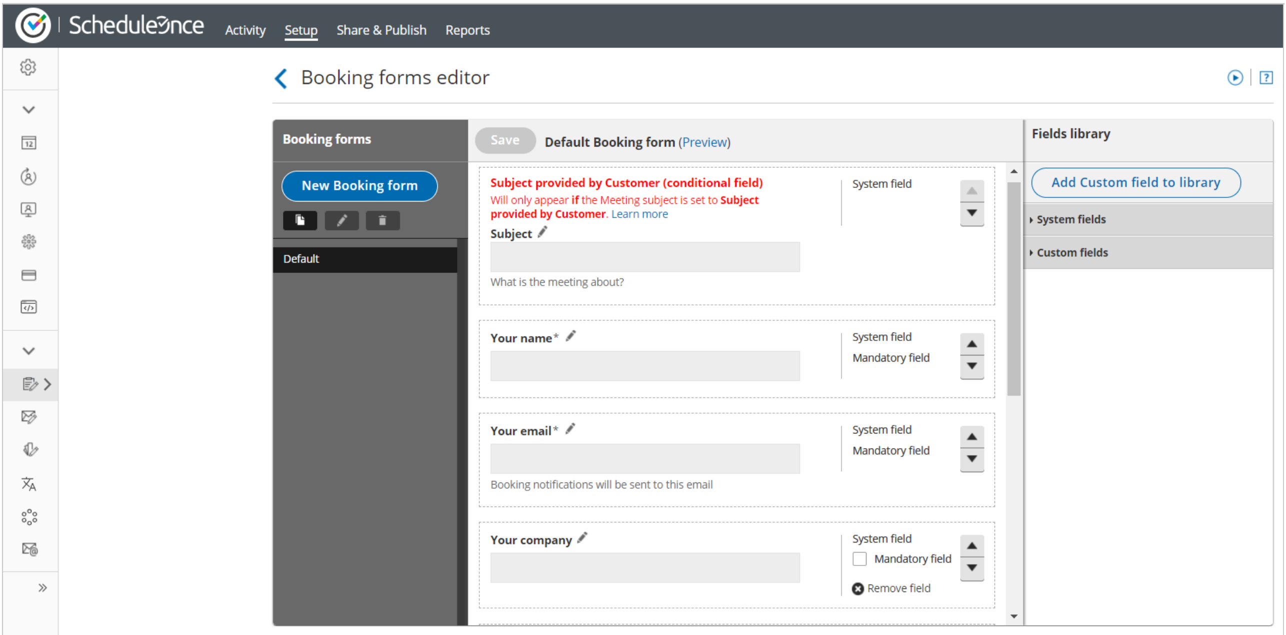

Figure 2: The Booking forms editor

3. Click the **New Booking form** button to create a new form. You can add any fields that you require to your form. OnceHub has a robust library of system and custom fields that you can use. You can also create your own fields if you require other information.

4. Use the **Remove field** link to remove any unnecessary fields.

5. Define which fields will be mandatory for customers to fill out and the order in which fields are presented.

You're all set! Be sure to associate the Booking form with the relevant Booking pages and Event types. Learn more about the Booking forms editor

Accessing Customer Data

The principles of data protection by design and by default require that controllers limit the accessibility to customer data. This is important for OnceHub accounts with multiple Users. If your account has multiple Users, you should limit access to your Customer data by assigning user roles and permissions.

OnceHub has two type of Users: Administrators and Members. Learn more about OnceHub User roles

It is recommended that you limit the amount of Administrators in your OnceHub account. While OnceHub allows you to have multiple Administrators, to comply with the Data protection by design principle, we recommend you only grant the Administrator role to users who configure setup and require access to reports, billing, or other essential Administrator permissions. Users who receive bookings, but do not need to configure scheduling scenarios, should be granted the role of Member.

OnceHub recommends that you only grant Users permission to booking pages they require. By assigning Users roles and permissions, you can limit who has access to data related to OnceHub bookings. This will allow you to ensure that you are compliant with the GDPR principles of data protection by design and default. Learn more about User management

Users will also be assigned a product license or go without a license. The only difference between Users with and without a OnceHub license is that those with a license can accept appointments through an enabled Booking page. Users without a license can do everything else in the account those with a license can do, according to their account role (Member or Administrator).

OnceHub has additional user permissions related to Booking pages. Learn more about Booking page access permissions

There are four access permission levels:

- **Owner:** This is the person receiving the bookings made via that page. There can only be one Owner for each booking page. The Owner has access to all booking and Customer data related to the Booking page. Both Administrators and Members can be Owners of Booking pages.
- **Editor:** Editors do not receive bookings from the Booking page, but have almost complete access to the booking and Customer data related to that booking page. Both Administrators and Members can be Editors of Booking pages.
- **Viewer:** Viewers cannot edit a Booking page, but do have access to the booking and Customer data associated with the booking page. Only Administrators can have the role of a Viewer.
- **No access:** No access means that the Booking page will not show up in the User’s account at all and the User will have no access to the booking or Customer data related to the page. Only members can be assigned no access to Booking pages.

To learn more about OnceHub's compliance with the GDPR, read our ebook: A practical guide to using OnceHub in a GDPR compliant manner

Data subject rights under the GDPR

Last Modified on Jun 5, 2023

The General Data Protection Regulation (GDPR) grants new privacy rights to data subjects. The aim of these rights is to provide transparency to individuals about how their data is being used and to give them control over the use of their own personal data.

Chapter 3 of the GDPR defines the rights of the data subject. Some of the rights should be considered when you are using OnceHub, including:

- The right to access data
- The right to rectification
- The right to erasure

Controllers must be ready to comply with these rights and answer any requests from data subjects. Several of these rights may require you to access, or edit data collected via OnceHub. OnceHub provides tools to help you fulfill these rights, and is available to assist you in fulfilling any requests from data subjects. The following sections explain how to respond to certain data subject rights.

The right to access data

Under the GDPR, data subjects have the right to know what data belonging to them is being processed by the controller (Article 15 of the GDPR). Upon request, controllers must be able to provide data subjects with the following information:

- A report of all processed data
- Purpose of processing
- Categories of personal data
- Recipients or categories of recipients who have, or have had access to the data
- The expected period of time for which the data will be stored
- If the data was not collected from the data subject, the source of the information
- Any information regarding profiling or automated decision-making used upon the data

Should you receive a data access request from a data subject who scheduled with you via OnceHub, you can provide a report of all data processed by OnceHub by using our reports feature.

Create a report for data access requests

1. In **OnceHub**, go to **Reports** and select **Customer reports** (See Figure 1).

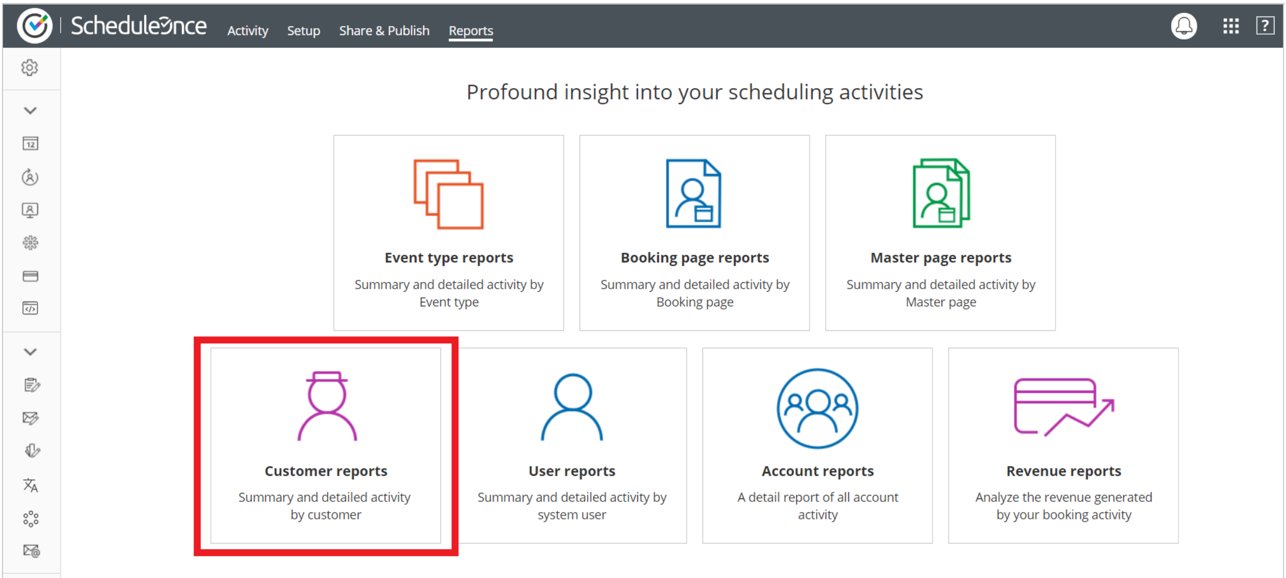

Figure 1: Customer reports

2. Select whether you want the data sorted by by **Meeting time** or **Activity creation** and select the date range of the data you want to view. To ensure you are providing a comprehensive report, your date range should start at the time you started using OnceHub.

3. Next, select the specific Customer to create a detailed report (See Figure 2).

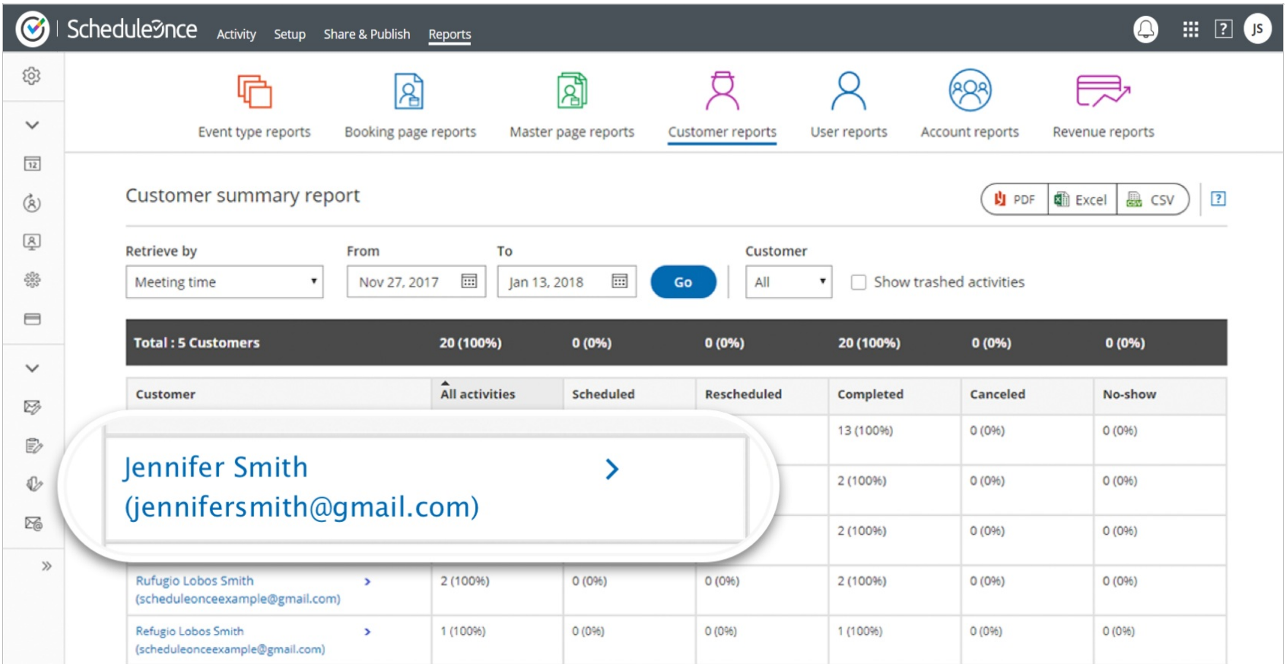

Figure 2: Customer summary report

4. Once you select the customer, you will see a detail report of all the Customer’s booking activity. You can click the **Display columns** button to add any field that you use in your Booking forms to the report (see Figure 3).

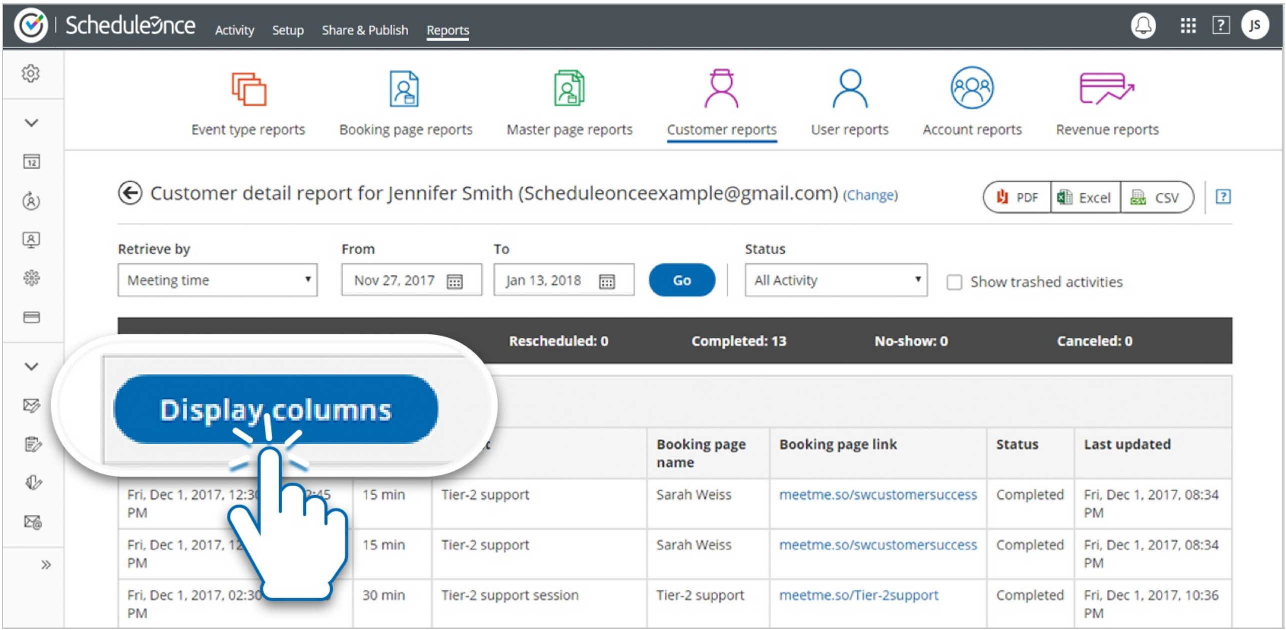

Figure 3: Customer detail report

5. When you have finished defining, you can export the report in order to provide it to your Customers. You can export the report to a PDF, Excel, or CSV file (See Figure 4).

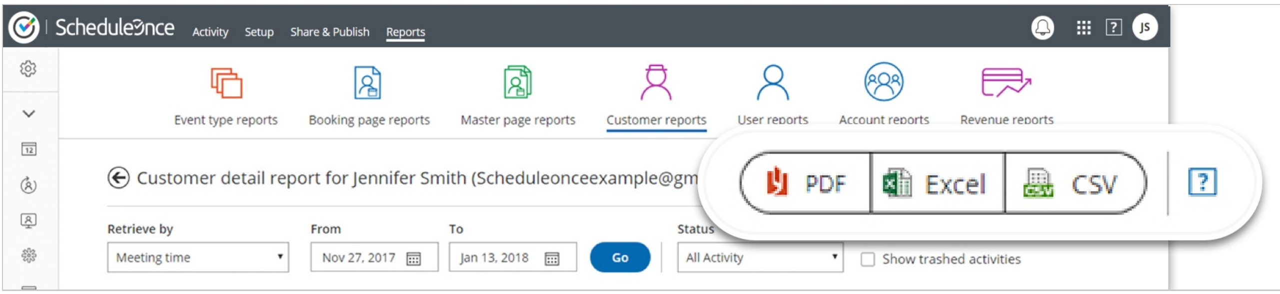

Figure 4: Export the report

You're all set! You have now created a report that you can share with a data subject. Learn more about OnceHub reports

The right to rectification

Data subjects have the right to request that you correct any of their data that is inaccurate or incomplete (Article 16 of the GDPR). Should a data subject exercise their right to rectification, contact OnceHub and we will correct the data as soon as reasonably possible.

The right to erasure

Data subjects may request that their data be erased or deleted (Article 17 of the GDPR). Controllers must comply with this request as long as the data is no longer required for the purpose for which it was collected. Should a data subject exercise their right to erasure, you can do this in the Activity stream. Learn more about deleting activities

To learn more about OnceHub's compliance with the GDPR, read our ebook: A practical guide to using OnceHub in a GDPR compliant manner

FAQs about the GDPR

Last Modified on Apr 30, 2020

The General Data Protection Regulation (GDPR) is the most significant privacy regulation in years. Below we have consolidated some of the most frequently asked questions to help you understand the impact of the regulation.

When did the GDPR come into effect?

The GDPR took effect on May 25, 2018. The legislation was approved and adopted by the European Parliament in April 2016, and is recognized as a law in all EU member states. The two-year transition period was to allow member states to ensure the law is fully implementable at the time it goes into effect.

Who does the GDPR affect?

The GDPR applies to all organizations that offer products or services to, or monitor the data of EU residents. This includes organizations located outside of the EU that may have prospects or customers who are EU residents. Additionally, the regulation applies to B2B service providers that process data on behalf of organizations.

What are the penalties for non-compliance?

Organizations that do not comply can be fined up to 4% of annual global turnover or €20 million, whichever is higher. This is the maximum fine that can be imposed for the most serious infringements. For smaller infringements, the GDPR imposes smaller fines. For example, a company can be fined 2% for not having their records in order, not notifying the supervising authority and data subject about a breach, or not conducting impact assessments.

What constitutes personal data?

Any information that can be used to identify an individual. This includes data directly linked to a person, such as their name, identification number, location, or any online identifier. Personal data can also be indirectly linked to an individual, including physical, physiological, genetic, mental, economic, cultural, or societal information

What is the difference between a data processor and a data controller?

A controller is the entity that determines the purposes, conditions and means of the processing of personal data, while the processor is an entity which processes personal data on behalf of the controller.

Does my business need to appoint a Data protection officer (DPO)?

Your organization may need to appoint a DPO if you are in the public sector, if you regularly and systematically monitor data subjects on a large scale, or if you process sensitive data on a large scale. Your DPO can either be an employee of your organization, or be retained as a contracted service. If your organization doesn't fall into one of these categories, then you do not need to appoint a DPO. Learn more about the requirement to appoint a DPO

Do I have to get explicit consent from my data subjects?

The GDPR requires that you have a "legal basis for processing," meaning a legal right for collecting, storing, or accessing data belonging to a specific person. Explicit consent from the data subject is one way to establish a legal basis for processing. With online scheduling, because the activity is customarily initiated by customers, a lawful basis for processing can usually be obtained without consent. Under the GDPR you can process information if it is necessary to fulfill a business obligation to a prospect or customer. When a prospect or customer initiates scheduling, this creates a business obligation for you to conduct the requested meeting. For most organizations, this should be enough to ensure a lawful basis for processing information via OnceHub without requesting consent. Learn more about lawful bases for processing

To learn more about OnceHub's compliance with the GDPR, read our ebook: A practical guide to using OnceHub in a GDPR compliant manner

GDPR Terminology

Last Modified on Jun 8, 2023

The General Data Protection Regulation (GDPR) uses legal, technical and privacy terminology that might not be clear at first. Below we have outlined some of the key terminology to help you cut through the jargon and understand the GDPR. You can find a nicely formatted and full version of the regulation articles here.

- **OnceHub:** The company that owns and develops the online scheduling products Booking pages and Chatbots. OnceHub is the legal entity that upholds the principles of the GDPR.
- **Controller**: People or organizations that determine the purpose and means of processing personal data. In our case, OnceHub Users are controllers.
- **Processor**: People or organizations that collect, store, or process data on behalf of controllers. In our case, OnceHub is the processor.
- **Sub-processor**: Third-party businesses that perform data processing on behalf of processors. OnceHub uses a number of sub-processors, which are listed in our Data processing addendum.
- **Data subject**: An individual to whom personal data relates. Data subjects must be living, identifiable individuals. In our case, data subjects refer to prospects and Customers who schedule appointments via OnceHub's products.
- **Personal data**: Any information that can be used to identify an individual. This includes data directly linked to a person, such as their name, identification number, location, or any online identifier. Personal data can also be indirectly linked to an individual, including physical, physiological, genetic, mental, economic, cultural, or societal information.
- **Processing**: Any operation performed on personal data. This includes automated and manual operations such as collecting, recording, organizing, structuring, storing, adapting, altering, retrieving, consulting, using, disclosing, disseminating, making available, combining, restricting, erasing or destroying.
- **Data processing addendum (DPA)**: A contractual agreement between two organizations outlining terms and responsibilities for data protection.
- **Data protection officer (DPO)**: A position within an organization responsible for ensuring the security and protection of data. A DPO can be an employee of an organization, or be retained as a contracted service.
- **EU representative**: A person or organization designated by a controller or processor located outside of the EU to represent the controller in EU member states. The EU representative is responsible for GDPR compliance and can act on behalf of the controller. Supervisory authorities may address the EU representative in place of the controller or processor.
- **Supervisory authority**: An independent public authority established by an EU member state to enforce the GDPR. Each member state has its own supervisory authority.

To learn more about OnceHub's compliance with the GDPR, read our ebook: A practical guide to using OnceHub in a GDPR compliant manner

The GDPR's privacy principles

Last Modified on Jun 5, 2023

The General Data Protection Regulation (GDPR) outlines key principles designed to protect the privacy of individuals. It is important that users ensure their use of OnceHub is aligned with these principles.

Lawfulness, fairness, and transparency

Data controllers have certain responsibilities relating to how they collect and process data from customers. Article 5 of the GDPR outlines the principles for processing data:

- **Lawful:** There must be a legal basis for processing. Article 6 of the GDPR outlines several methods for ensuring a legal basis for processing. With online scheduling, you can most likely establish a legal basis on that grounds that processing is necessary for fulfilling a business obligation. Learn more about establishing a lawful basis for processing
- **Fair:** Any processing of data should be in line with the stated purpose for processing. Customers should be aware of the purpose for processing their data.
- **Transparent:** Data subjects should be informed how their data will be processed. For example, you could provide Customers with a link to your privacy policy when you invite them to schedule. Learn how to add a privacy policy to your Booking form

Purpose limitation

Data should only be collected for a "specific, explicit, and legitimate purpose." Any processing of data should be in line with the stated purpose. Data subjects should be aware of the purpose for processing their data, and controllers must obtain consent if the purpose of processing changes. For example, data provided by Customers via OnceHub is processed for scheduling meetings. You shouldn't use this data for marketing unless you have explicitly advised the Customer that you will.

Data minimization

Data collection should be "adequate, relevant, and limited to what is necessary in relation to the purposes for which they are processed." For example, you should configure your OnceHub Booking form to include only fields that are necessary for scheduling the meeting with your client. Learn more about data minimization

Storage limitations

Personal data should only be kept if necessary. For example, OnceHub booking data is kept for the lifetime of your account, allowing you to generate reports and gain insights into your scheduling activity. When you delete you OnceHub account all OnceHub booking data is automatically deleted as well.

To learn more about OnceHub's compliance with the GDPR, read our ebook: A practical guide to using OnceHub in a GDPR compliant manner

Compliance at OnceHub

Last Modified on Jan 23, 2023

The OnceHub security and privacy program is a multi-layered system of controls designed to comply with multiple regulatory frameworks and industry standards. We understand the importance of supporting the regulatory needs of our Customers, and ensuring that you're able to satisfy your compliance obligations.

HIPAA and HITECH

OnceHub is fully compliant with the strict security and privacy policies required in the US healthcare sector. We work with expert consultants to implement the policies and processes required to protect your data and satisfy HIPAA (Health Insurance Portability and Accountability Act) and the HITECH (Health Information Technology for Economic and Clinical Health) Act. All electronic protected health information (ePHI) that is collected, stored, and distributed by OnceHub is encrypted both at rest and in transit, ensuring the highest level of security. Learn more about HIPAA compliance

We sign standard OnceHub Business Associate Agreements (BAAs) with accounts that qualify. If you would like to sign a Business Associate Agreement (BAA) with us, please contact us.

PCI DSS

OnceHub treats payment data security with the utmost importance. The internal payment systems implemented by OnceHub have been designed from the ground up to ensure maximum security and comprehensive compliance with the PCI DSS (Payment Card Industry Data Security Standard) framework.

We work with expert consultants to implement the policies and processes required to protect your data, undergo regular audits, and work to stay up to date with the latest requirements and best practices. All electronic payment card information collected, stored, and distributed by OnceHub is encrypted both at rest and in transit, ensuring the highest level of security.

FERPA

OnceHub provides educators and other members of the education community with all the tools necessary to maintain compliance with FERPA (Family Educational Rights and Privacy Act). All OnceHub data is encrypted at rest and in transit, and protected by the highest level of industry standard and security controls.

We securely back up data in near real time using industry standard tools. Backups are stored in a geographically separate region with multiple levels of redundancy. This means that FERPA-regulated data will always be stored properly and will be accessible when needed.

Commitment to the GDPR

OnceHub is committed to complying with the Global Data Protection Regulation (GDPR). Taking effect in May 2018, the regulation creates a unified privacy framework enforceable by all EU member states. The GDPR applies to organizations that process data associated with identifiable EU individuals, whether or not the business is based in the EU.

We welcome the progress brought forth by this landmark regulation. At OnceHub, we stand by the GDPR's key principles, including breach notification, privacy by design, privacy by default, fairness and transparency. Learn more about the GDPR and the steps we take to stay compliant

What is HIPAA?

Last Modified on Jan 23, 2023

> **Note:**
>
> To comply with HIPAA, you must sign a Business Associate Agreement (BAA) with OnceHub. The standard OnceHub BAA is available for paid accounts that qualify. Contact us to speak more about a HIPAA-compliant account.

The Health Insurance Portability and Accountability Act (HIPAA) is United States legislation that provides data privacy and security provisions for safeguarding medical information.

The act was originally introduced in 1996 to improve transfer of patient data between health insurance providers. Over the years, the legislation expanded to incorporate privacy and security rules that govern transmission of medical data in general.

More recently, the Department of Health and Human Services (HHS) introduced the HITECH Act. This additional legislation, extends the responsibility and liability of Business Associates. For example, rules regarding breach notifications, encryption and fines for non-compliance were introduced.

OnceHub complies with the policies and processes required by (HIPAA) and the Health Information Technology for Economic and Clinical Health Act (HITECH). Learn more about OnceHub compliance with HIPAA privacy and security rules

HIPAA Compliance

Last Modified on Dec 14, 2023

Note:

To comply with HIPAA, you must sign a Business Associate Agreement (BAA) with OnceHub. The standard OnceHub BAA is available for paid accounts that qualify.

To arrange for a signed BAA agreement, email support@oncehub.com

The Health Insurance Portability and Accountability Act (HIPAA) is United States legislation that provides data privacy and security provisions for safeguarding medical information. OnceHub has built the necessary controls to satisfy HIPAA. HIPAA include two sets of rules, the HIPAA privacy rule and the HIPAA security rule.

The HIPAA privacy rule

The HIPAA privacy rule governs the circumstances under which health data can be disclosed. The rule defines to whom the data can be disclosed, how the data can be used, and how long it should be retained. For example, your OnceHub data is permanently deleted when you stop using our service, fulfilling the HIPAA privacy rule.

The HIPAA security rule

The HIPAA security rule governs how patient data is secured. The rule defines three categories of controls designed to protect patient data from unauthorized disclosure:

- Technical safeguards
- Administrative safeguards
- Physical safeguards

OnceHub has a comprehensive security program that employs a multi-layered control system designed to protect patient data. For example, all patient data is encrypted and our servers are continuously monitored with advanced threat detection tools. The OnceHub security program has been audited to ensure that it satisfies the HIPAA security rule.

The OnceHub BAA

Last Modified on Dec 14, 2023

The OnceHub Business Associate Agreement (BAA) is a legal mechanism for ensuring patient data is adequately protected. To be HIPAA compliant, covered entities must sign a BAA with their business associates. View our Business Associate Agreements

To arrange for a signed BAA agreement, email support@oncehub.com

What are my responsibilities?

To comply with the terms of the OnceHub BAA, account holders must use our service in a HIPAA compliant manner. For example, you should enable account security policies to satisfy the requirements of the HIPAA security rule. Users that are not familiar with the HIPAA security rule should follow best practices when securing their OnceHub account. Learn more about securing your account

What is covered?

The OnceHub BAA covers patient data that is stored on our servers. Data that is passed to third-parties via integrations is outside our control and not covered by the BAA. If you are using third-party integrations you should ensure that the receiving party is compliant with HIPAA. For example, if you have a calendar integration with Google, you should make sure that your BAA with Google covers the data transferred from OnceHub.

SMS notifications are not covered by the OnceHub BAA. The SMS service is not HIPAA compliant and should only be used to send OnceHub booking notifications that do not contain patient information.

The OnceHub help desk software is not HIPAA compliant. Support inquiries containing health information should not be sent to the OnceHub support team.

Why can’t I downgrade?

A HIPAA compliant account cannot be reverted to a regular OnceHub account. Patient data is stored for the lifetime of your account, and your patient data is regulated by HIPAA until it is deleted. Patient data stored in OnceHub is only deleted when you stop using our service.

HIPAA compliant accounts require additional security controls. For example, Short session timeouts should be enabled to satisfy the HIPAA security rule. HIPAA compliant accounts must use these security features and can’t be downgraded to a lower plan.

Account troubleshooting: I can't access my account

Last Modified on Jun 12, 2019

This article includes solutions for Users who are unable to access their account.

> **Note:**
>
> If your account has been locked due to your account's security policy, you should contact a OnceHub administrator from your organization. Learn more about Account lockout policies

I've forgotten my password

OnceHub has a quick, easy and secure way to reset your password.

To reset your password:

1. Navigate to the OnceHub sign-in page
2. Click on **Forgot your password?** and enter your registered login email.
3. We will send you a Password reset link which you can use to sign in.
4. Go to the email inbox associated with your sign-in email and open your Password reset link. Clicking on the link will prompt you for a new password and immediately log you into your account.

My password reset link isn't working

For security reasons, Password reset links are sometimes deactivated. If your password reset link isn't working it may be that:

- **The link has expired** - password reset links remain active for 60 minutes from the time they were issued.
- **The link has been used before** - password reset links can only be used once.
- **A newer link has been issued** - only the most recently issued password reset link can be active and older links expire automatically. Make sure you're checking the most recent email for the link.

If you see one of the above errors, you can always start the process again by clicking on **Forgot your password?** link on the sign-in page.

My account has been locked

If your account has been locked, you should contact a OnceHub Administrator from your organization. Administrators can unlock all User accounts apart from their own. To unlock a User account, click on your profile icon on initials in the top right corner and select **Users**. Hover over the Users profile and click on the unlock link.

If you are the only Administrator and your account has been locked, or if you're not sure who the Administrator for your own account is, please contact us.

I've forgotten my login email or my login email is no longer accessible

This is easily rectified. Simply contact us and we will get you back into your account as securely and quickly as we can. We will need to verify you as the account owner to protect your data.

How do you verify me as the account owner?

Each account is evaluated on a case-by-case basis and depends on your specific circumstances. Typically, you will be asked to provide billing details, photographic ID or answers to security questions. You can save time by providing the following information in your initial request:

As a form of ID, send us a photo of one of the following:

- Passport
- Driver's license
- National Identification Card

If you pay by credit card:

- The last 4 digits of your card
- The credit card brand (Visa/MasterCard/AmEx/Discover/JCB)
- The name as it appears on the card
- The registered billing address

If you pay with PayPal:

- The PayPal login email
- The profile ID for the recurring subscription

Where is the PayPal profile ID for my recurring subscription?

1. Login to the PayPal account associated with OnceHub.
2. Navigate to **Settings (gear icon) -> Payments (tab) -> Manage upcoming payments -> Preapproved payments -> My preapproved payments**. Here you should find a recurring payment to "OnceHub Inc". Click into the subscription to see the details.
3. Here you should see the profile ID.

Google Calendar connection troubleshooting

Last Modified on Oct 18, 2022

This article describes potential issues with Google Calendar integration and how these issues can be fixed.

I cannot connect - what should I do?

This may be due to temporary communication problems with the Google Calendar API. Please try the following:

1. Make sure cookies are enabled on your browser
2. Verify that you can log in to your G Suite account
3. Try to connect again from OnceHub. In your OnceHub account, go to **Profile-> Calendar connection** and click the **Renew your Google Calendar connection** button.

Connection errors after a successful connection

> **Important:**
>
> During a connection failure, **OnceHub Booking pages cannot accept bookings**. This measure is taken to prevent the possibility of double bookings.

Once a successful connection was established, it may fail because of Google token expiration. The Google token might expire for one of the following reasons:

- Your password is no longer valid and the token must be renewed. It might be because you updated the password in your Google account.
- There were no activities in the past 6 months with your Google Calendar. As a result, the token wasn't used for 6 months and expired.
- You might have additional tokens used for other applications and your Google account has exceeded the limit of token requests. Therefore, the OnceHub token has expired.

In all cases, the OnceHub access to your Google Calendar has been revoked and you must renew your connection. Sign in to your OnceHub Account, go to the left sidebar and click **Profile -> Calendar connection**, then click the **Reconnect your Google Calendar** button.

Why do my busy times appear in wrong hours?

This might be due to differences between the time zone in your connected Google Calendar and the time zone in the User profile of your OnceHub account. Both must be the same.

In OnceHub, click on your profile image or initials in the top right corner and select **My profile**. In the **Date and time** section, edit the time zone.

In Google Calendar, click the settings icon, then choose Settings. Update the time zone under "Primary time zone".

Configuration issues in OnceHub

Busy time in Google Calendar is not blocking my availability

If busy time is not blocking your availability, you can check the following settings:

- On the relevant Booking page **-> Associated calendars**: Make sure that you're retrieving busy time from this calendar. Learn more about the Associated calendars section
- On the relevant Booking page **-> Scheduling options -> One-on-one or Group sessions**: Make sure you haven't set the option to Group sessions with multiple or unlimited bookings per slot.

> **Note:**
>
> If you're using Event types, the Scheduling options section is located on the Event type. In this case, you will need to review the **One-on-one or Group sessions** setting in all Event types.

- If you are working in Booking with approval mode, make sure that you did not approve two separate bookings in the same time slot.
- In your connected calendar, open the event that is not blocking your availability and check that the status of the event is not set to "Free". Only events with a status of "Busy" block your availability. Learn more about when Google Calendar events are treated as busy time in OnceHub.

New bookings are not added to your Google Calendar

1. Hover over the lefthand menu and go to the Booking pages icon → Booking pages → your Booking page → **Associated calendars**.
2. Make sure your calendar is marked as the **Main booking calendar** or an **Additional booking calendar**. Learn more about the Associated calendars section

I cannot see my scheduled booking in my Google Calendar

In your Google Calendar, make sure that the calendar in which your meeting was scheduled is selected. Find it in the calendar list in the left bar and click it to select it.

In OnceHub, you can also select the activity in the Activity stream, then click the action menu (three dots) in the right-hand pane and select **View Calendar event** (Figure 1).

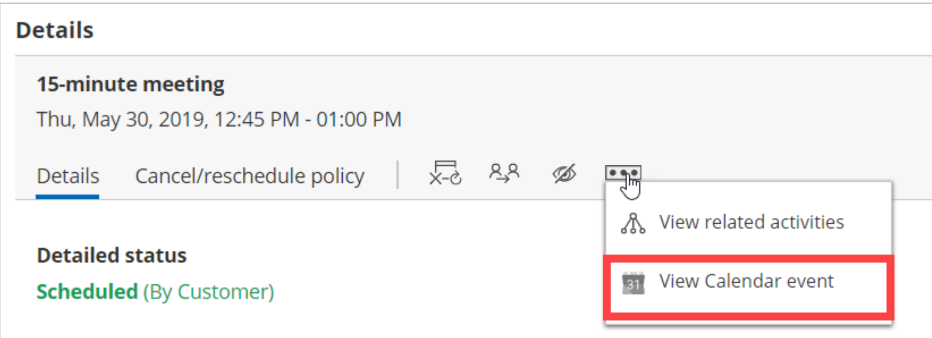

Figure 1: View Calendar event

Why do my busy times appear in wrong hours?

This might be due to differences between the time zone in your connected Google Calendar and the time zone on your Booking page. Both must be the same.

Hover over the lefthand menu and go to the Booking pages icon → Booking pages → your Booking page → **Overview**, and edit the time zone.

In Google Calendar, click the settings icon, then choose Settings. Update the time zone under "Primary time zone".

Microsoft 365 Calendar via OAuth 2.0 connection troubleshooting

Last Modified on Sep 17, 2024

This article describes potential issues with your Office 365 Calendar via OAuth 2.0 connection and how these issues can be fixed. If you're still having problems, please contact us and we will be happy to assist you.

I cannot connect. What should I do?

This may be due to temporary communication problems with the Office 365 API. Please try the following:

1. Make sure cookies are enabled on your browser.
2. Verify that you can log in to your Office 365 account.
3. Try to connect again from your OnceHub account.

If you are still seeing issues, please contact us and we'd be glad to assist. Please also check with your Office 365 admin to ensure that your Office 365 user has access to the Office 365 API.

Connection errors after a successful connection

Once a successful connection was established, it may fail due to reasons described below.

Important:

During a connection failure, **OnceHub Booking pages cannot accept bookings**. This measure is taken to prevent the possibility of double bookings.

To re-enable bookings and meetings, you must either restore the connection by reconnecting, or disconnect your calendar by clicking the **Disconnect** link and then reconnect again.

Possible connection failure reasons include:

- **Change of Office 365 or network configuration:** Your administrator may have changed the Office 365 settings, firewall settings, or access permissions. Contact your IT support to find out about such changes.
- **Temporary disconnection:** Sometimes a connection may be temporarily lost, for example during network maintenance. Once the issue is resolved, the connection is restored automatically.

Configuration issues in OnceHub

Busy time in Office 365 Calendar is not blocking my availability in OnceHub

If busy time is not blocking your availability, you can check the following settings:

- On the relevant Booking page **-> Associated calendars**: Make sure that you're retrieving busy time from this calendar. Learn more about the Associated calendars section
- **On the** relevant Booking page **-> Scheduling options -> One-on-one or Group sessions**: Make sure you haven't set the option to Group sessions with multiple or unlimited bookings per slot.

> **Note:**
>
> If you're using Event types, the Scheduling options section is located on the Event type. In this case, you will need to review the **One-on-one or Group sessions** setting in all Event types.

- If you are working in Booking with approval mode, make sure that you did not approve two separate bookings in the same time slot.
- In your connected calendar, open the event that is not blocking your availability and check that the status of the event is not set to "Free". Only events with a status of "Busy" block your availability. Learn more about when Office 365 Calendar events are treated as busy time in OnceHub.

New bookings are not added to my Office 365 Calendar

1. Hover over the lefthand menu and go to the Booking pages icon → Booking pages → your Booking page → **Associated calendars**.
2. Make sure your calendar is marked as the **Main booking calendar** or an **Additional booking calendar**. Learn more about the Associated calendars section

I cannot see my scheduled meeting in my Office 365 Calendar

In your Office 365 Calendar, make sure that you've selected the calendar that your meeting was scheduled in. Find it in the calendar list in the left bar and click it to select it.

In OnceHub, you can also select the activity in the Activity stream, then click the action menu (three dots) in the right-hand pane and select **View Calendar event** (Figure 1).

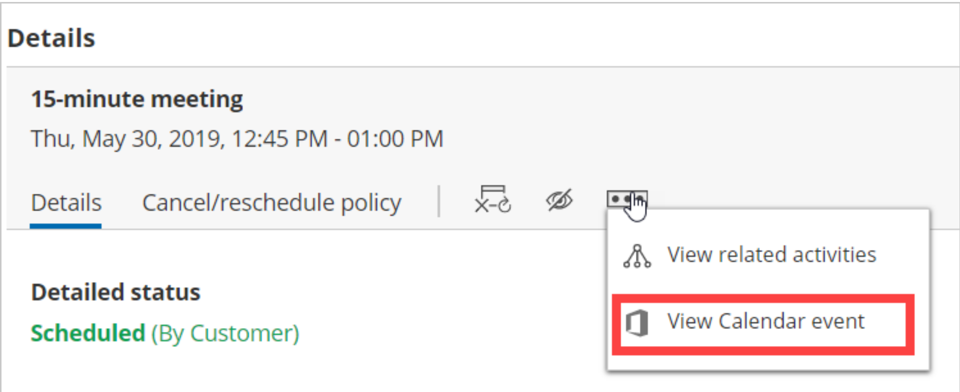

Figure 1: View Calendar event

Exchange/Outlook Calendar connection troubleshooting

Last Modified on Aug 8, 2024

This article describes potential issues with Exchange/Outlook Calendar integration and how these issues can be fixed. If you're still having problems, please contact us and we will be happy to assist you.

Unable to connect to the Exchange server

The Exchange/Outlook Calendar connection wizard will take you through the shortest and easiest way to connection. You will first be asked for your Outlook email and password, and then additional fields may be required.

- **Email:** Verify that you entered your Outlook email address correctly.
- **Password:** Verify that you entered your Outlook password correctly. Test that your password is valid by connecting to your OWA (Outlook Web App) in your browser. The password is correct only if you succeed. If your Exchange account is set up with 2-step verification, you must create an app password first, and then use this special password to connect your OnceHub Account to your Exchange/Outlook Calendar.
- **EWS URL:** Verify that you entered the correct URL. Learn how to determine your EWS URL
- **Domain\UserName:** Depending on the Exchange configuration, this field may be left blank OR require your Windows Domain\UserName:
  - **Domain:** This can be the Windows domain that you log into when entering internal systems or your PC. Try searching your organization's instructions about connecting your email client or mobile phone to your mailbox. It can be any name selected by your system administrators. The domain may not be required, depending on your server's configuration.
  - **Backslash:** Make sure you are using a backslash (the symbol \ and not /) between the domain and the user name. If you don't need to include the domain in your credentials, you won't need a backslash.
  - **User name:** This is usually the ID you use to access internal systems. Use your internal ID, with which you log into internal systems (Windows Active Directory name or User Principal Name).

If you verified that all values are correct and were entered exactly in the required format, and are still not able to connect, this means the connection is failing due to either a firewall issue or some Exchange setting or configuration. Contact your IT support to troubleshoot and resolve the issue.

> **Note:**
>
> You can test your credentials using the Microsoft Remote Connectivity Analyzer. This is a useful tool for verifying the availability of Exchange Web Services (EWS) connection and the connectivity of the Exchange server.

Connection errors after a successful connection

Once a successful connection is established, it may fail due to the reasons described below.

> **Important:**
>
> During a connection failure, **OnceHub Booking pages cannot accept bookings**. This measure is taken to

prevent the possibility of double bookings.

To re-enable bookings and meetings, you must either restore the connection by reconnecting, or disconnect your calendar by clicking the **Disconnect** link and then reconnect again.

Possible connection failure reasons include:

- **Change of password:** If your Exchange/Outlook password was changed or your app password was deleted, you will need to reconnect. Sign in to your OnceHub Account, go to the left sidebar and click **Profile -> Calendar connection**, then click the **Reconnect your Exchange/Outlook Calendar** button.
- **Change of Exchange or network configuration:** Your administrator may have changed the Exchange settings, firewall settings, or access permissions. Contact your IT support to find out about such changes.
- **Temporary disconnection:** Sometimes a connection may be temporarily lost, for example during network maintenance. Once the issue is resolved, the connection is restored automatically.

Configuration issues in OnceHub

Busy time in Exchange/Outlook Calendar is not blocking my availability in OnceHub

If busy time is not blocking your availability, you can check the following settings:

- On the relevant Booking page **-> Associated calendars**: Make sure that you're retrieving busy time from this calendar. Learn more about the Associated calendars section
- On the relevant Booking page **-> Scheduling options -> One-on-one or Group sessions**: Make sure you haven't set the option to Group sessions with multiple or unlimited bookings per slot.

> **Note:**
>
> If you're using Event types, the Scheduling options section is located on the Event type. In this case, you will need to review the **One-on-one or Group sessions** setting in all Event types.

- If you are working in Booking with approval mode, make sure that you did not approve two separate bookings in the same time slot.
- In your connected calendar, open the event that is not blocking your availability and check that the status of the event is not set to "Free". Only events with a status of "Busy" block your availability. Learn more about when Exchange/Outlook Calendar events are treated as busy time in OnceHub

New bookings are not added to my Exchange/Outlook Calendar

1. Hover over the lefthand menu and go to the Booking pages icon → Booking pages → your Booking page → **Associated calendars**.
2. Make sure your calendar is marked as the **Main booking calendar** or an **Additional booking calendar**. Learn more about the Associated calendars section

I cannot see my scheduled booking in my Exchange/Outlook Calendar

In your Exchange/Outlook Calendar, make sure that you've selected the calendar that your meeting was scheduled in. Find it in the calendar list in the left bar and click it to select it.

In OnceHub, you can also select the activity in the Activity stream, then click the action menu (three dots) in the right-hand pane and select **View Calendar event** (Figure 1).

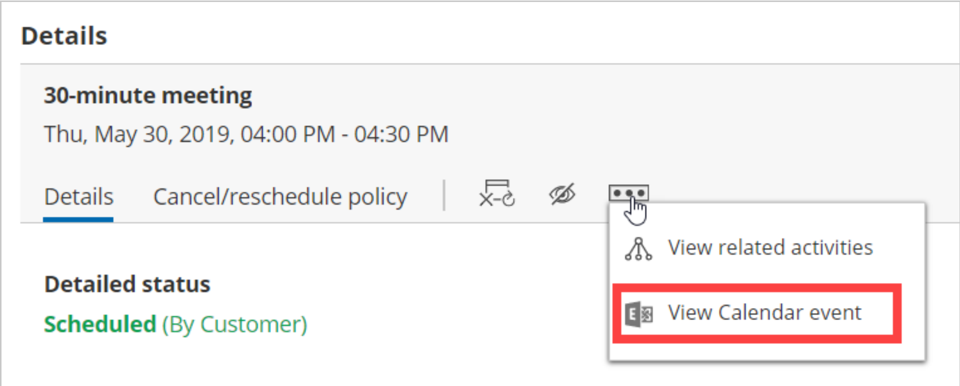

Figure 1: View Calendar event

Other issues

Contact OnceHub support if you experience other issues.

Outlook Calendar troubleshooting - My events are not showing in the expected time zone

Last Modified on Apr 5, 2023

If busy times appear in wrong hours on OnceHub or in your Outlook Calendar, there may be a time zone difference between your Outlook's time zone and the time zone on your Booking page. To change the time zone:

- Go to the relevant Booking page (Figure 1). In the **Overview** section, select the new time zone and save.

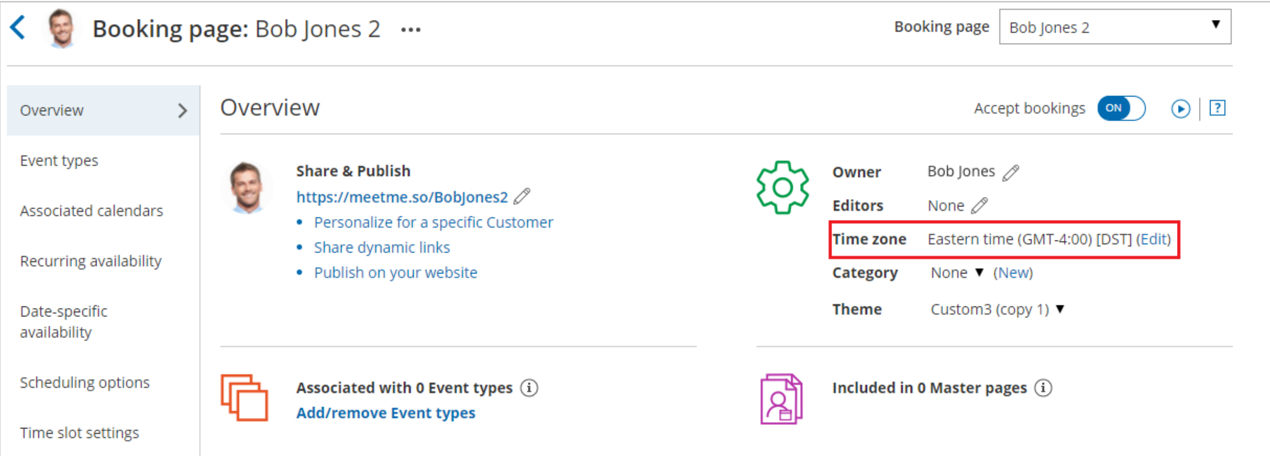

Figure 1: Booking page Overview section

- **In your Outlook client:** To change the time zone in Outlook, click on **File -> Options -> Calendar settings**. In the time zone area, select the new time zone and save. Note: The time zone of Outlook client is the same as your PC. Reload/refresh the OnceHub page to reflect the change.
- **In your web Outlook via the browser** (Figure 2)**:**

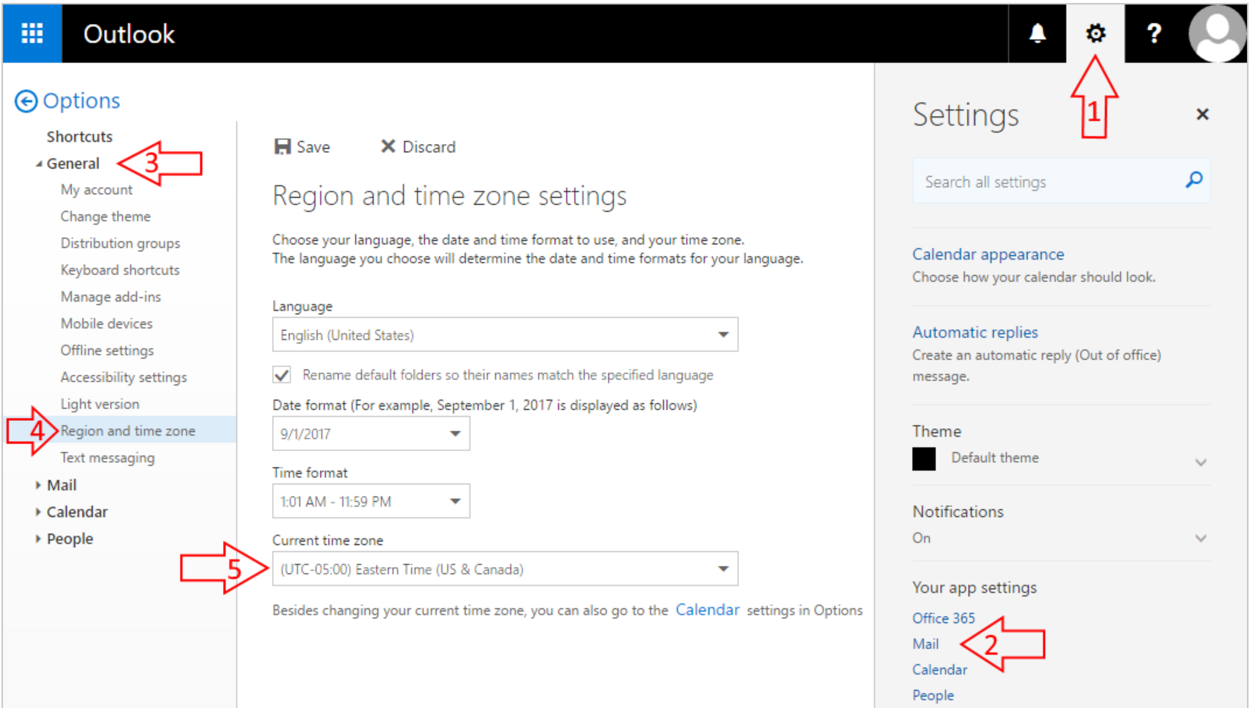

Figure 2: Outlook calendar region and time zone section

- Click **settings icon**.
- Click **Mail**.
- Click **General**.
- Click **Region and time zone**.
- Set **your time zone**.

iCloud Calendar connection troubleshooting

Last Modified on Oct 18, 2022

This article describes potential issues with iCloud Calendar integration and how these issues can be fixed. If you're still having problems, please contact us and we will be happy to assist you.

I cannot connect. What should I do?

This may be due to temporary communication problems with the iCloud API. Please try the following:

1. Make sure you are using an iCloud app-specific password.
2. Make sure cookies are enabled on your browser.
3. Verify that you can log into your iCloud account.
4. Try to connect again from OnceHub.

If you're still having problems, please contact us and we will be happy to assist you.

Connection error after a successful connection

Important:

During a connection failure, **OnceHub Booking pages cannot accept bookings**. This measure is taken to prevent the possibility of double bookings.

Once a successful connection is established, it may fail due to a number of reasons. For example, If you change your primary Apple ID password, all your existing iCloud app-specific passwords are automatically revoked and must be generated again. In this case, your OnceHub Account must be reconnected with a new app-specific password.

To reconnect your iCloud calendar, sign in to your OnceHub Account, go to the left sidebar and click **Profile -> Calendar connection**. Then click the **Reconnect your iCloud Calendar** button. You will need to reconnect your OnceHub account using an app-specific password. Learn more about iCloud app-specific passwords

Configuration issues in OnceHub

Busy time in iCloud Calendar is not blocking my availability in OnceHub

If busy time is not blocking your availability, you can check the following settings:

- On the relevant Booking page **-> Associated calendars**: Make sure that you're retrieving busy time from this calendar. Learn more about the Associated calendars section
- On the relevant Booking page **-> Scheduling options -> One-on-one or Group sessions**: Make sure you haven't set the option to Group sessions with multiple or unlimited bookings per slot.

Note:

If you're using Event types, the Scheduling options section is located on the Event type. In this case, you will need to review the **One-on-one or Group sessions** setting in all Event types.

- If you are working in Booking with approval mode, make sure that you did not approve two separate bookings in the same time slot.
- In your connected calendar, open the event that is not blocking your availability and check that the status of the event is not set to "Free". Only events with a status of "Busy" block your availability. Learn more about when iCloud Calendar events are treated as busy time

New bookings are not added to my iCloud Calendar

1. On the relevant Booking page **-> Associated calendars**.
2. Make sure your calendar is marked as the **Main booking calendar** or an **Additional booking calendar**. Learn more about the Associated calendars section

I cannot see my scheduled booking in my iCloud Calendar

In your iCloud Calendar, make sure that you've selected the calendar that your meeting was scheduled in. Find it in the calendar list in the left bar and click it to select it.

In OnceHub, you can also select the activity in the Activity stream, then click the action menu (three dots) in the right-hand pane and select **View Calendar event** (Figure 1).

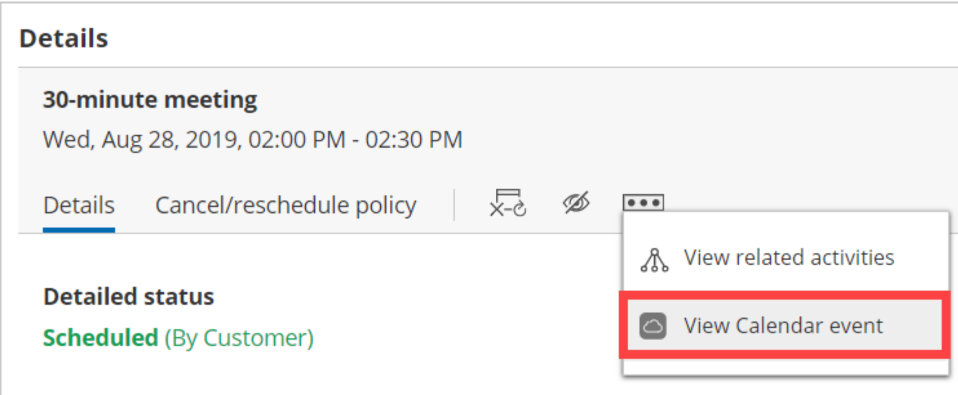

Figure 1: View Calendar event

Pages

Last Modified on Oct 16, 2023

OnceHub pages allow you to customize the design and content of landing pages that include forms, chatbots, and scheduling. You can customize the URL (https://oncehub.com/YOUR-PAGE) and match the design to your branding.

Permissions

By default, all admin users can create and manage pages.

If an admin has allowed member users to create and manage pages, members will be able to do this as well. Turn this permission on or off by selecting the gear icon in the top right corner **→ Settings and permissions → Member permissions**.

Make a new page

You can make a new page from scratch or use one of the provided templates and tweak it to fit your needs.

Figure 1: Select template or create from scratch

If you're making a page from scratch, you can create it in a few quick steps.

Page settings

Layout options

- Modern: Includes area for a picture, page title, and description, along with the chatbot or form (coming soon) included on the page. Header logo at the top.
- Classic: Chatbot or form is the only content included on the page, along with the header logo.

Interaction type

- Chatbot: An interactive, conversational engagement with responses depending on the visitor's answers, using conditional logic to route through the experience. Includes:
  - Live chat
  - Instant meetings
  - Scheduling
- Form: Questions filled out with values, with questions asked depending on the visitor's answers, using conditional logic to route through the form. Includes:
  - Live chat
  - Instant meetings
  - Scheduling

Select the specific chatbot or form you wish to use. If you don't already have a chatbot or form, you can create a new one before creating the page.

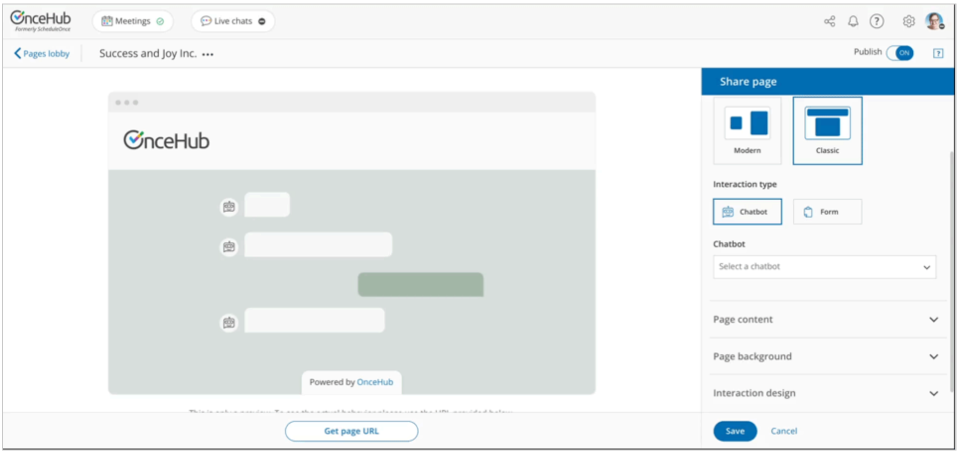

Figure 2: Select chatbot or form

Note:

OnceHub pages use both forms and chatbots. To embed a standalone booking page, so someone schedules with you, a form can help with this. Create a form that includes a scheduling action and ask just the questions you need for the meeting (name, email, etc.). Learn more

You can also use a chatbot for scheduling, if you'd prefer a more dynamic, interactive experience. Learn more

Other settings

- Page content: Customize the header logo and adjust the branding.
- Page background: Adjust the hex code for the solid background or provide your own image.
- Interaction design: Customize the buttons/chatbot interaction color.
    - Just for chatbots: Customize the chatbot icon used during the conversation and choose the name the chatbot displays.

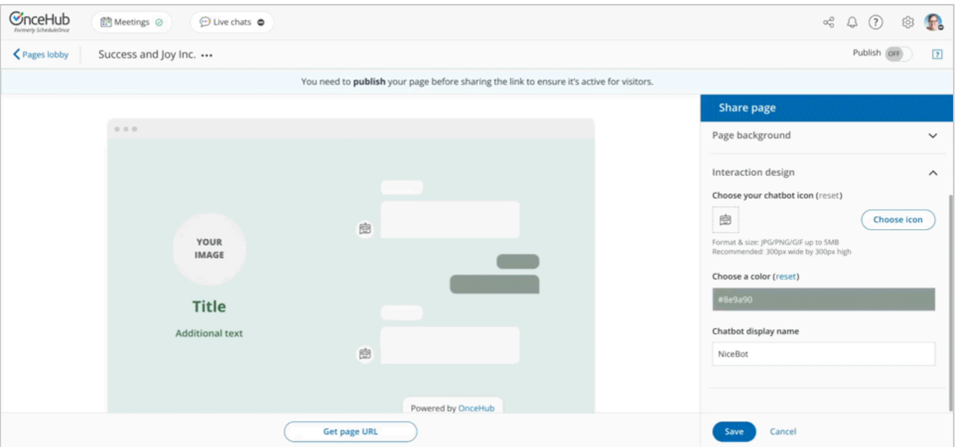

Figure 3: Customize your page

Publish your page

At the top right, you can toggle the Publish setting ON or OFF.

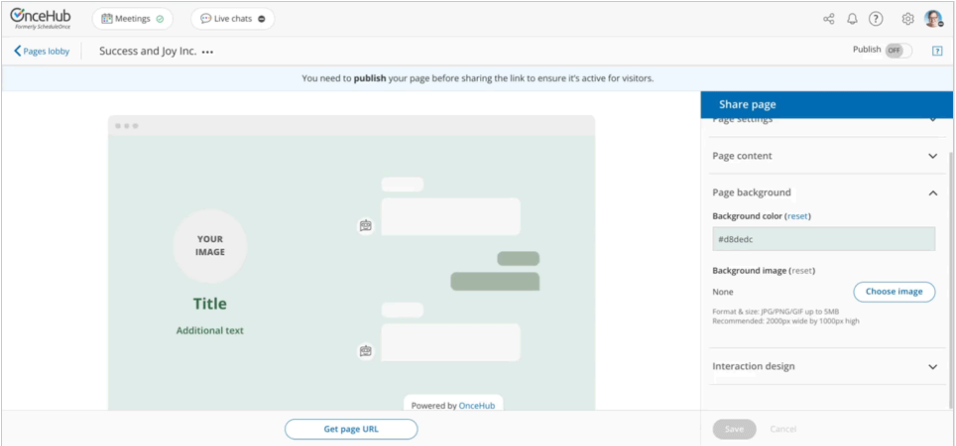

Figure 4: Toggle publish ON

This changes the page to active status, so others can access it and interact with it.

You can grab the page URL using the button on the bottom, **Get page URL**. In the pop-up, click the pencil icon to customize the URL for your organization.

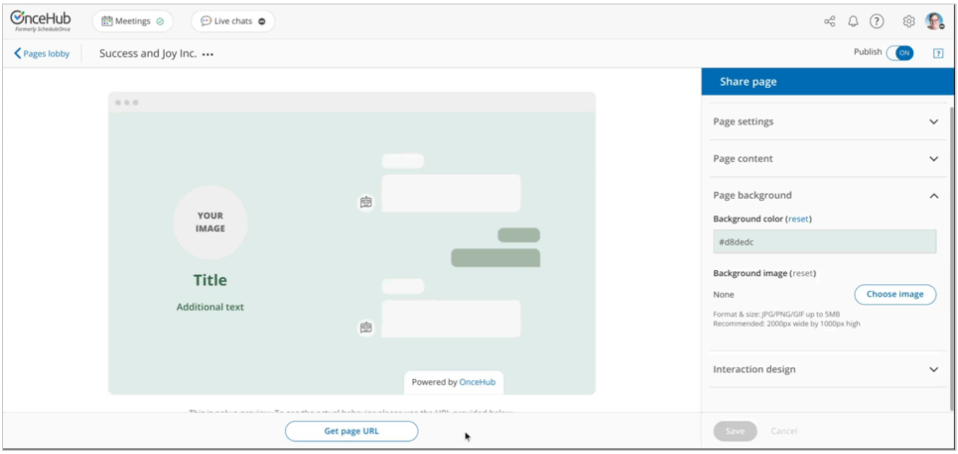

Figure 5: Get page URL and update URL

Important:

Once you change the URL, any former URLs will no longer work for that page. If you've already shared the link, make sure everyone has already accessed the page who needs to.

Troubleshooting CRM Integration Issues

Last Modified on Dec 3, 2024

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Migrating from starter to basic plans

Last Modified on Nov 8, 2024

Overview

As the Starter plan has been discontinued, existing Starter accounts will soon be migrated to OnceHub's free Basic plan. All users with Starter accounts will receive a migration timeline by email.

Users who wish to remain on a free plan will lose access to some features. You'll find a comparison table and summary of changes below to help you identify whether anything you will lose access to is relevant to your organization.

To retain access to the features you require, contact support, and they can assist you with the transition to a Schedule, Route, or Engage plan.

Comparison table

Feature	Starter Discontinued	Basic Free	Schedule $10/seat/month*	Route $19/seat/month*	Engage $39/seat/month*
Booking calendar website embed	✔	Embedded pages will show no available times	✔	✔	✔
Salesforce, HubSpot, Zapier, and API integrations	✔	Integration will disconnect and any field mapping will be lost	✔	✔	✔
Unlimited users			✔	✔	✔
Two-way calendar sync	✔		✔	✔	✔
Additional booking forms	✔		✔	✔	✔

Routing forms	✔	Will no longer appear anywhere they’re embedded		✔	✔
Chatbots	✔	Will no longer appear anywhere they’re embedded			✔
Live engagements	✔				✔
Advanced security features	✔	Security add-on $5/seat/month	Security add-on $5/seat/month	Security add-on $5/seat/month	Security add-on $5/seat/month

*When paying annually. Monthly pricing also available.

Summary of changes

If you want to stay on a free plan, no action is needed. You’ll automatically be switched to the Basic plan on the date specified in your email. Here’s what will happen on that date:

- **User Management**: Unlicensed users will be removed, and the remaining licensed user will become the super administrator/account owner. To keep all users, upgrade to a Schedule plan or higher.
- **Embedded Booking Pages**: Embedded booking pages on your website will display a “no times available” message. Upgrade to a Schedule plan or higher to continue using embedded pages, or remove the embed code if you choose to stay on the free plan. Standalone booking links will still work on the Basic plan.
- **Chatbots and Routing Forms**: These will be unpublished and will no longer appear on your site. Upgrade to a Route plan to use routing forms, or to an Engage plan for chatbots and live interactions.
- **Additional Booking Forms**: Extra booking forms will be removed, reverting your account to the default booking form. To create multiple forms, upgrade to a Schedule plan or higher.
- **Integrations**: All advanced integrations (e.g., Zapier, Salesforce, HubSpot, API) will be disconnected, and mappings will be lost. If you upgrade later, you’ll need to reconnect and reconfigure. To keep these integrations, upgrade to a Schedule plan or higher.
- **Multi-User Features**: Features like panels, teams, and resource pools will no longer work, and master pages will display a “no times available” message. Upgrade to a Schedule plan or higher to use team features.

- **Calendar Sync**: Two-way calendar sync will stop. You'll need to manage meetings directly in OnceHub. Upgrade to a Schedule plan or higher to keep this feature.

- **Security Features**: Advanced security options will be disabled or reset to default, including CAPTCHA and custom password, lockout, and session policies. Upgrade to a paid plan and add the security add-on to access these features.

Your free Basic plan will include one user and one active booking page, similar to the Starter plan.

You can compare each plan's full features and benefits on our pricing page. Contact our support team with any questions or to upgrade your plan.