OnceHub Knowledge Base PDF

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Signing up with OnceHub

There are two ways to sign up using OnceHub:

1. Create Your Own Account

- Go to the OnceHub **signup** page.
- Sign up using your existing GSuite or Office 365 account, or with an email address.
- This automatically starts a 14-day free trial with access to most OnceHub features. **Learn more about what's included in the free trial**.

2. Join Your Organization's Account

If your organization already uses OnceHub, your administrator will create an account for you and send you an email invitation with a link to join.

Follow **Join Your Organizations Account Guide** for step-by-step instructions

Getting Started

Once you've signed up and logged in, we recommend checking out our **Introduction to OnceHub** article. This guide will walk you through the initial setup process and help you get the most out of OnceHub.

Upgrading During the Trial

You can upgrade your trial account to a paid plan at any time during your 14-day free trial.

To upgrade from the trial:

1. Click on **Purchase Now**, located in the top-right corner of your account.
2. Select the plan you'd like to purchase.
3. Customize your upgrade by deciding on the number of seats, billing cycle, and any other preferences.

Please note that once you upgrade to a paid plan you will not be able to downgrade to the free Basic plan.

Switching to the Free Basic Plan

If you prefer to use OnceHub's basic scheduling features without paying for a subscription, you can switch to the free Basic plan at the end of your 14-day trial.

To downgrade from the trial:

1. Click on **See all options** in the popup that appears at the end of your trial.
2. **Select** the Basic plan.
3. Click on **Confirm downgrade**.

Please note that this is the only way to downgrade to the free Basic plan. If you upgrade to a paid plan, you will not be able to downgrade to the free plan in the future.

Let us know if you need additional help!

Introduction to OnceHub

Welcome to **OnceHub**! Our platform simplifies scheduling, streamlines interactions, and boosts productivity by offering tools for booking meetings, engaging visitors, and routing inquiries efficiently. This guide will help you get started with the essential features.

Essential Setup Steps

If you haven't already done so during your onboarding, get started quickly by following these steps:

1. **Connect Your Calendar and Video Conferencing Tools:**
   - Click your **Profile Menu**.
   - Go to **User Integrations** and connect your calendar and video conferencing tools for seamless scheduling.
2. **Set Up Meeting Locations and Availability:**
   - Define meeting locations and availability in the **Scheduled Meeting Availability** section under the Profile Menu.
   - Ensure your correct **Time Zone** is selected by clicking **Edit** in the top-right corner.

Discovering Product Features

When you log in, you'll see that a personalized **Booking Calendar**, **Chatbot**, and **Routing Form** have been auto-created to help you get started.

- **Booking Calendars:** Simplify meeting scheduling by allowing you to customize meeting details such as subject, duration, and host availability.
- **Routing Forms:** Screen and direct visitors based on their responses, improving efficiency and personalization.
- **AI-Driven Chatbots:** Engage dynamically with visitors and provide tailored assistance based on their needs.

We recommend setting up your **Booking Calendar** first, as it serves as the foundation for scheduling and simplifies the onboarding process. For detailed guidance, check out our **Getting Started with Booking Calendars** guide.

Finding Help

Need assistance? Click the **Help Menu** in the top-right corner to access:

- **Support Center:** Browse articles and guides.
- **Chat with Support:** Connect with a live support agent instantly.
- **Contact Support:** Submit a ticket for complex inquiries.

For a more hands-on experience, book a **step-by-step setup call** with our expert support agents. We'll guide you through setting up your account and answer any questions to ensure a smooth start.

Book your session here

You're Ready to Get Started!

You're now ready to explore OnceHub's features! Start with your Booking Calendar for a smooth scheduling experience and explore our other tools for even more ways to engage clients effectively.

Your OnceHub trial account

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**.
- **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.
- **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 from your corporate account, 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.

Getting Started

Getting started with OnceHub is straightforward, thanks to the resources and support available to all trial users.

- **Help center:** OnceHub offers a variety of **getting started articles** that walk you through setting up your account, creating **booking calendars**, **building chatbots** and **routing forms**, and more.
- **Support during trial:** The trial includes 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.
- **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.

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 30 days from the expiration of your trial. During this period, you have the option to downgrade to the free plan or purchase a subscription to reactivate your account while retaining all your information.
- **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.

End of your trial

Your OnceHub account will be paused at the end of your 14-day trial period. To continue using our services, you will need to take action by choosing your desired plan.

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**.

If you need more time to explore our features after your trial has ended, please **contact our sales team** for assistance.

Joining your organization's OnceHub account

Joining your organization's OnceHub account is straightforward. This guide will walk you through every step, explain common pitfalls, and answer frequently asked questions to ensure a smooth onboarding experience.

Step 1: Invitation Email

- Your administrator will send you an email invitation from OnceHub with the subject line "Invitation to Join." This email contains a link to join your organization's OnceHub account.
- If you don't see the email in your inbox, check your spam or junk mail folder, and make sure the invitation was sent to the correct email address.
- If you still can't find it, ask your administrator to resend the invitation.

Step 2: Sign-In Link

- Click the **Sign in to your account** button or link in the invitation email. This opens the OnceHub sign-in page.
- The link works for 24 hours. If it expires, ask your administrator to resend the invitation.

Step 3: Onboarding Process

- After signing in, you'll be guided through an onboarding process where you can set your availability and connect your productivity suites and video conferencing tools.

We recommend checking out our **Introduction to OnceHub** article. This guide will walk you through the initial setup process and help you get the most out of OnceHub.

FAQs

Can someone else set up my profile for me?

An administrator can change your profile settings, but you must connect your productivity suite and any standalone integrations yourself.

We recommend that you complete the onboarding process yourself and then notify your account administrator so that they may make any necessary changes.

Can I delete my profile?

Only an administrator can delete user profiles. Even administrators can't delete their own profiles; another administrator must do it.

My admin is trying to add me to the account, but they see an alert that an account with my email ID already exists.

To use that email ID, you must first delete your existing OnceHub account. Follow these steps:

1. Sign in to OnceHub with that email.
2. Click the gear icon in the top navigation menu.
3. Select **Settings and permissions** and click **Delete account**. This will free up the ID.

Your admin can now invite you to their account. This will send you an email with a sign-up link to join the account.

How to identify your product

Identifying your scheduling product version ensures you can access the correct support resources and receive accurate assistance from our support team. Follow the steps below to determine whether you're using our new product **Booking Calendars**, or our legacy scheduling product **Booking Pages**.

Help articles related to Booking Calendars are clearly labeled as **Booking Calendars [New]** to ensure you're viewing the correct support materials.

Check your account creation date

- If your account was created after January 20, 2025, you are using **Booking Calendars [New]**.
- If your account was created before this date, you are likely using **Booking Pages [Legacy]**.

Tip: You can locate your account creation date in your welcome email. If you did not create the account or cannot find the email, follow the steps below or contact your Account Admin for assistance.

Check your Account

1. Log in to your account.
2. Look at the navigation menu on the left of your screen.

    - If "Booking Calendars" appears in the menu, you're using the new product.
    - If "Booking Pages" appears, you're using the legacy product.

Still Not Sure? Contact Support!

If you're still unsure which product version you're using, our support team can assist you. **Raise a support ticket** or **start a live chat**, and we'll confirm your product version.

Using OnceHub from your mobile

OnceHub provides an easy way to manage your scheduling, meetings, and availability directly from your mobile device. This guide explains how to maximize your mobile experience.

Manage Meetings

- **View Meeting Details:** Access information about canceled, rescheduled, and upcoming meetings, including participant details.
- **Filter Meetings:** Use filters such as:
  - My upcoming meetings
  - All meetings
- **Update Meetings:** Cancel, reschedule, or mark meetings as "no-show" directly from the mobile interface.

Manage Your Availability

- **Weekly Working Hours:** Customize your standard working hours.
- **Date-Specific Overrides:** Adjust availability for specific dates to accommodate changes.
- **Meeting Location Preferences:** Set availability based on meeting type (e.g., video, phone, in-person).

Object Sharing

Easily copy links directly from the Home page for:

- Booking Calendars
- Routing Forms
- Chatbots

Create a Shortcut for Quick Mobile Access

Set up a home screen shortcut for faster access to OnceHub on your mobile device:

- **For Android Devices:**

  1. Open OnceHub in your mobile browser (e.g., Chrome).
  2. Tap the menu (three dots) in the top-right corner.
  3. Select Add to Home Screen.
  4. Name the shortcut and tap Add.

- **For iOS Devices:**

    1. Open OnceHub in Safari.
    2. Tap the Share icon (a square with an upward arrow).
    3. Select Add to Home Screen.
    4. Customize the shortcut name and tap Add.

Introduction to SMS notifications

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 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

The Field Library

Fields are fundamental to organizing and leveraging data, enabling you to store captured information from various interactions and seamlessly send it to third-party integrations. This capability streamlines data management and ensures that valuable insights are consistently available across your platforms.

This article will guide you through understanding what system and custom fields are, what field types are, creating new custom fields, and saving guest information to custom fields.

System Fields

These are created by OnceHub when a new account is established and are available for use automatically in all accounts.

- Cannot be archived
- Directly accessible on Meeting and Contact objects in **API, webhooks**, and **Zapier**
- Can be used to **automatically update CRM records**

Custom Fields

These are user-created fields, allowing you to create fields that suit your organization's specific needs.

- Can be archived
- Allows you to define both a field label and a field name (within established naming conventions)
- Available via **API, webhooks**, and **Zapier** within the custom_fields[] array on the corresponding object type
- Can be used to **automatically update CRM records**

Understanding Field Types

To effectively use fields, it's important to understand the difference between Meeting fields, which store data for specific meetings, and Contact fields, which are for Contact records. Here's how they differ and when to use each:

Meeting Fields

Meeting Fields are designed for storing information specific to a particular meeting. Use this field type when the information you’re collecting is unique to one event or interaction, rather than the individual attending it, such as:

- Reason for scheduling
- What they would like to accomplish in the meeting
- Any additional information needed to prepare for the meeting

Contact Fields

Contact Fields are used for information that identifies or provides details about an individual regardless of the meetings they attend. Use this field type to capture and maintain data that remains consistent across all interactions with the individual, such as

- Company name

- Job title
- Home address

How to Create a New Custom Field

Accessing the Library

1. Click on the gear icon in the top right.
2. Select **Field Library** from the dropdown.

Creating a new field

1. Click on **Create field** in the top right in the Field Library.
2. Enter the field details:
    - **Object Type:** Choose what type of guest information the field will capture.
    - **Field Label:** Label for referring to this field within OnceHub.
    - **Data Type:** Choose the type of data the field will capture.
    - **Field Name:** A distinct identifier for the field, used for API and integration purposes.
    - **Description:** Description of what the field is for (**Optional**).
3. Click on **Save**.

How to Save Guest Information to Custom Fields

Guest data can be saved into custom fields across all our products, such as Booking Calendars, Routing Forms, Chatbots, and Booking Pages. For a detailed guide on mapping to custom fields based on your product, please refer to the following articles.

- **Mapping Chatbot Questions to Custom Fields**
- **Mapping Routing Form Questions to Custom Fields**
- **Mapping Booking Calendar Questions to Custom Fields**
- **Mapping Booking Page Custom Fields to Contact Fields**

What you need to know before Disconnecting Your Calendar

Disconnecting your calendar is a significant action that may impact your ability to manage bookings effectively. It can prevent updates to calendar events of existing bookings, such as cancellations or reschedules. Because of this, it is not a recommended step for troubleshooting calendar issues.

If you're experiencing problems with your calendar, it's better to **contact customer support** for assistance instead of disconnecting.

Effects of Disconnecting Your Calendar

When you disconnect your calendar, it's important to be aware of the following impacts:

Existing Bookings

For all calendar types, your previously scheduled bookings will remain on your calendar, but they will no longer be updated if changes, such as cancellations or reschedules, occur.

Calendar Settings

All settings related to your calendar will be reset to default. This means that if you decide to reconnect a calendar in the future, you will need to reconfigure these settings.

How to Disconnect Your Calendar

If you still choose to disconnect your calendar, here's how to do it:

Accessing Your Calendar Integration

1. Click on your profile picture in the top right-hand corner.
2. Select **User Integrations**.
3. Click on your connected calendar integration.

Disconnecting Your Calendar

1. Click the **Disconnect** link displayed next to your email address.
2. Click on **Disconnect**.

If you are using Booking Calendars [New]

If you use **Booking Calendars**, you have the additional feature of a Secondary Calendar, which you can also disconnect. Disconnecting your Primary Calendar will automatically disconnect your Secondary Calendar as well.

How Busy Time from Your Connected Calendar is Used to Manage Availability

OnceHub uses busy time from your connected calendars to automatically determine when you're unavailable, ensuring your guests can only schedule time with you when you're free. Here's a breakdown of what is considered "busy" time in each case.

Google Workspace

OnceHub retrieves busy times from:

- The Main calendar of the connected account.
- Sub-calendars you've created within your Google Workspace account.
- Calendars shared with you, provided you have at least Read-only permissions.

Calendar Event Statuses:

- **Busy**: These events block your availability in OnceHub.
- **Free**: These times are not considered busy and remain available for scheduling.

Please take a look **at this article** if you need any additional information on managing the OnceHub integration with Google Workspace.

Office 365

OnceHub retrieves busy times from:

- The Main calendar of the connected account.
- Sub-calendars created within your Microsoft 365 account.
- Shared calendars with at least Read-only permissions.

Calendar Event Statuses:

- **Working Elsewhere, Tentative, Busy, and Away**: These events block availability in OnceHub.
- **Free**: These times are available for scheduling.

Please take a look **at this article** if you need any additional information on managing the OnceHub integration with Office 365.

Microsoft Exchange

OnceHub retrieves busy times from:

- The Main calendar of the connected account.

- Sub-calendars created in your Exchange account.
- Shared calendars with at least Read-only permissions.

Calendar Event Statuses:

- **Working Elsewhere, Tentative, Busy, and Away**: These events block availability in OnceHub.
- **Free**: These times remain available for scheduling.

Please take a look **at this article** if you need any additional information on managing the OnceHub integration with Microsoft Exchange.

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iCloud Calendar

OnceHub retrieves busy times from:

- The Main calendar of the connected account.
- Sub-calendars in your iCloud account.
- Shared calendars, as long as you have at least Read-only permissions.

Calendar Event Statuses:

- **Busy**: These events block availability in OnceHub.
- **Free**: These times remain available for scheduling.

Important Note for iCloud Users: All-day iCloud events cannot be marked as "Busy." To block out an entire day, create a specific event that spans your working hours.

Please take a look **at this article** if you need any additonal information on managing the OnceHub integration with iCloud Calendar.

Key Points to Remember

- The **Busy Time Is Retrieved From** setting allows you to include or exclude specific sub-calendars or shared calendars.

If you are using Booking Calendars [New]

- You can connect additional secondary calendars to retrieve busy times. For step-by-step guidance, refer to the **Connecting a Secondary Calendar article**.

Connect OnceHub to Your Google Workspace

Connecting OnceHub to your Google Workspace account allows you to integrate with your Google suite to effortlessly sync your calendar, send email notifications, and schedule video meetings.

Why Connect to Google Workspace?

Connecting your **Google Workspace** account provides essential features that enhance your schedule and notification management, such as:

- **Google Calendar integration:** Automatically sync your booking events with your Google Calendar, ensuring your availability is always up-to-date.
- **Gmail connectivity:** Send booking notifications directly from your Gmail address, providing a consistent and professional communication experience (this feature is optional).
- **Google Meet integration:** Connect Google Meet to OnceHub to easily schedule video meetings.

How to Connect to Your Google Workspace

Follow these steps to connect your Google Workspace account:

Navigating to User Integrations

1. Click on your profile picture in the top right-hand corner.
2. Select **User Integrations**.

Connecting to Your Google Workspace

1. Click on the **Google Workspace** tile.
2. Click on **Connect**.
3. Follow the instructions in the pop-up, to allow OnceHub to connect to your Google Workspace.

When connecting to your Google Workspace account, you might see an alert about the browser's pop-up blocker blocking the Google connection window.

There are two possible ways in which this can be fixed:

- Create an exception for https://app.oncehub.com/. This will whitelist OnceHub with your browser and pop-ups from OnceHub will not be blocked.
- 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**

Managing Your OnceHub Integration With Google Workspace

This guide explains how to navigate your Google Workspace integration in OnceHub and manage related scheduling features effectively. Each section details specific functionality and provides instructions for customizing your workflow.

Accessing the OnceHub Integration with Google Workspace

To manage your Google Workspace integration:

1. Click on your profile picture in the top right.
2. Select **User Integrations** from the dropdown.
3. Click on the **Google Workspace** tile.

Offering Google Meet to Guests

You can toggle whether your guests can choose Google Meet as a video conferencing method when booking meetings with you.

Sending Emails from Your Mailbox

You can toggle whether scheduled meeting emails to guests should:

- Be sent from your connected Google Workspace mailbox.
- Or, use the default sending address (mailer@oncehub.com).

Adjust this setting to align email communications with your organization's branding.

Retrieving Busy Time from Google Calendars

You can use the **Busy Time Is Retrieved From** option to determine how OnceHub retrieves your busy time. This option lets you choose one or more sub-calendars, including:

- Sub-calendars you've created within your Google Workspace account.
- Calendars shared with your Google Workspace account, as long as they have at least Read-only permissions.

When are Google events treated as busy in OnceHub?

- **Free:** OnceHub will not read this time as busy.
- **Busy:** OnceHub reads this time as busy and blocks availability.

If you are using Booking Calendars [New]

You can connect additional secondary calendars to retrieve busy times. For step-by-step guidance, refer to the **Connecting a Secondary Calendar article**.

Copying Meetings to Sub-Calendars

If you are using Booking Calendars [New]

You can use the **Meetings Are Copied To** option to automatically copy meetings to specific sub-calendars. Whenever a meeting is scheduled, the specified sub-calendar(s) will be added as guests to the calendar event.

This option lets you choose one or more sub-calendars, including:

- Sub-calendars you've created within your Google Workspace account.
- Calendars shared with your Google Workspace account, as long as they have at least Read-and-write permissions.

Cancelling and Updating OnceHub Bookings Directly in Google Calendar

With the Two-Way Sync toggles, you can easily update bookings directly from your Google Calendar. The two toggles allow you to do the following:

1. **Cancel Meetings:** Cancel bookings by simply deleting the corresponding calendar event.
2. **Update Meetings:** Easily make adjustments to existing bookings directly from your Google Calendar.
    - **Reschedule Meetings:** Change the time of a booking by moving it's calendar event.
    - **Allow Meeting Overlap:** Change your calendar event status to free or busy to define whether meetings can overlap.

Please see our article on **Allowing for Meeting Overlaps with Booking Calendars** if you would like to know how it works.

Caching Busy Time for Faster Scheduling

When you enable this option, OnceHub stores your busy time temporarily, so it doesn't need to fetch updates from your calendar in real-time every time someone interacts with your booking links. This allows OnceHub to provide a faster and smoother scheduling experience.

Note: We only retrieve whether you're marked as **busy** or **free** on your calendar and do not access any event details, ensuring your privacy.

How to Workaround the Google Calendar Quota

Google imposes a quota on the number of bookings that can be created in its calendar over a rolling 24-hour period. The exact calculation method for this quota is unknown and Google has not provided a definitive threshold after which the quota activates. While some published numbers exist, they don't consistently correlate with the activation of the quota.

What Happens When You Hit the Quota?

If the quota is exceeded:

- Booking links associated with the affected User and Google Calendar account will stop accepting bookings for up to 24 hours. When this happens the error message **A temporary connection error has occurred** will be displayed whenever a guest tries to confirm their booking.
- The quota operates on a rolling 24-hour window. Activity from exactly 24 hours prior ceases to count toward the quota at the same time it occurred.

Example Scenario:

- If a large number of bookings were made at 3:00 PM yesterday, those bookings will stop contributing to the quota at exactly 3:00 PM today.
- Once these bookings are excluded from the past 24 hours, your booking links may become active again

Please note that if a large number of appointments are immediately created soon after, the quota can be triggered again.

What to Do If You Hit the Quota

If your booking links are not working and you suspect that you hit the quota we recommend that you turn off calendar guest invites to ensure you won't be affected by the quota.

If you are using Booking Calendars [New]

You will need to turn it off in each Booking Calendar you use:

1. Click on **Booking Calendars** in the lefthand panel
2. Click on the Booking Calendar you want to edit.
3. Select the **Notifications Tab**.
4. Check the box for **Exclude guests**.
5. Click **Save**.

If you are using Booking Pages [Legacy]

You will need to turn it off in each Event type you use:

1. Click on **Booking Pages** in the lefthand panel
2. Click on the **Event type** you want to edit.
3. Select the **Customer notifications Tab** on the left.
4. Expand the **Calendar Event** section.
5. Uncheck the box for **Add Customer to Calendar event**.
6. Click **Save**.

Please **contact support** if you are still unable to receive bookings, or have any questions.

Connect OnceHub to your Microsoft Office 365

Connecting OnceHub to your **Microsoft Office 365** account allows you to integrate with your Microsoft suite to effortlessly sync your calendar, send email notifications, and schedule video meetings.

Why Connect to Microsoft Office 365?

Connecting your Microsoft Office 365 account gives you access to important features that improve how you manage your schedule and notifications:

- **Microsoft 365 Calendar integration:** Automatically sync your booking events with your Microsoft 365 Calendar, ensuring your availability is always up-to-date.
- **Outlook connectivity:** Send booking notifications directly from your Outlook email address, providing a consistent and professional communication experience (this feature is optional).
- **Microsoft Teams integration:** Connect Microsoft Teams to OnceHub to easily schedule video meetings.

How to Connect to Your Microsoft Office 365

Follow these steps to connect your Microsoft Office 365 account:

Navigating to User Integrations

1. Click on your profile picture in the top right-hand corner.
2. Select **User Integrations**.

Connecting to Your Microsoft Office 365

1. Click on the **Microsoft 365** tile.
2. Click on **Connect**.
3. Follow the instructions in the pop-up, to allow OnceHub to connect to your Microsoft Office 365 account.

When connecting to your Microsoft Office 365 account, you might see an alert about the browser's pop-up blocker blocking the connection window.

There are two possible ways in which this can be fixed:

- Create an exception for https://app.oncehub.com/. This will whitelist OnceHub with your browser and pop-ups from OnceHub will not be blocked.
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Accessing the OnceHub Integration with Microsoft 365

To manage your Microsoft 365 integration:

1. Click on your profile picture in the top right.
2. Select **User Integrations** from the dropdown.
3. Click on the **Microsoft 365** tile.

Offering Microsoft Teams to Guests

You can toggle whether your guests can choose Microsoft Teams as a video conferencing method when booking meetings with you.

Sending Emails from Your Mailbox

You can toggle whether scheduled meeting emails to guests should:

- Be sent from your connected mailbox.
- Or, use the default sending address (mailer@oncehub.com).

Adjust this setting to align email communications with your organization's branding.

Retrieving Busy Time from Outlook

You can use the **Busy Time Is Retrieved From** option to determine how OnceHub retrieves your busy time. This option lets you choose one or more sub-calendars, including:

- Sub-calendars you've created within your Microsoft 365 account.
- Calendars shared with your Microsoft 365 account, as long as they have at least Read-only permissions.

When are Outlook events treated as busy in OnceHub?

- **Free:** OnceHub will not read this time as busy.
- **Working elsewhere:** OnceHub reads this time as busy.
- **Tentative:** OnceHub reads this time as busy.
- **Busy:** OnceHub reads this time as busy.

- **Away:** OnceHub reads this time as busy.

If you are using Booking Calendars [New]

You can connect additional secondary calendars to retrieve busy times. For step-by-step guidance, refer to the **Connecting a Secondary Calendar article**.

Copying Meetings to Sub-Calendars

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You can use the **Meetings Are Copied To** option to automatically copy meetings to specific sub-calendars. Whenever a meeting is scheduled, the specified sub-calendar(s) will be added as guests to the calendar event.

This option lets you choose one or more sub-calendars, including:

- Sub-calendars you've created within your Microsoft 365 account.
- Calendars shared with your Microsoft 365 account, as long as they have at least Read-and-write permissions.

Cancelling and Updating OnceHub Bookings Directly in Outlook

With the Two-Way Sync toggles, you can easily update bookings directly from your Outlook Calendar. The two toggles allow you to do the following:

1. **Cancel Meetings:** Cancel bookings by simply deleting the corresponding calendar event.
2. **Update Meetings:** Easily make adjustments to existing bookings directly from your Outlook calendar.
    - **Reschedule Meetings:** Change the time of a booking by moving it's calendar event.
    - **Allow Meeting Overlap:** Change your calendar event status to free or busy to define whether meetings can overlap.

Please see our article on **Allowing for Meeting Overlaps with Booking Calendars** if you would like to know how it works.

Caching Busy Time for Faster Scheduling

When you enable this option, OnceHub stores your busy time temporarily, so it doesn't need to fetch updates from your calendar in real-time every time someone interacts with your booking links. This allows OnceHub to provide a faster and smoother scheduling experience.

Note: We only retrieve whether you're marked as busy or free on your calendar and do not access any event details, ensuring your privacy.

Configuring Default Microsoft 365 Calendar Reminders

You can customize how far in advance reminders should trigger for your Microsoft 365 calendar events. Use the **Default Microsoft 365 Calendar Reminders** drop-down list to select a time interval that fits your preferences.

Approving permissions for Microsoft 365 administrators

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:
   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 OnceHub to your Exchange/Outlook Calendar

Connecting OnceHub to your Exchange/Outlook Calendar ensures a real-time integration between your calendar and OnceHub.

How to Connect Your Exchange/Outlook Calendar

Follow these steps to connect your Exchange/Outlook Calendar account:

Navigating to User Integrations

1. Click on your profile picture in the top right-hand corner.
2. Select **User Integrations**.

Connecting Your Microsoft Exchange Calendar

1. Click on the **Microsoft Exchange Calendar** tile.
2. Click on **Connect**.
3. Follow the instructions in the pop-up, to allow OnceHub to connect to your Exchange/Outlook Calendar.

When connecting to your Microsoft Exchange account, you might see an alert about the browser's pop-up blocker blocking the connection window.

There are two possible ways in which this can be fixed:

- Create an exception for https://app.oncehub.com/. This will whitelist OnceHub with your browser and pop-ups from OnceHub will not be blocked.
- 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**

Connecting Using Advanced Settings

If your email and password alone do not successfully connect your Exchange calendar, the issue may be due to your Exchange server's unique configuration.

Follow these steps to provide the additional details needed for a successful connection:

Entering EWS URL

1. Expand **Advanced Settings** in the connection pop-up.
2. Enter your **EWS URL**.

Note: If you do not know your EWS URL, please refer to our **How to Determine the EWS URL article**.

Entering your User name

Next, you'll need to complete the User name field. Depending on your Exchange server's configuration, use one of the following options:

- **Leave Blank:** This field is often optional for many Exchange servers; therefore, leaving it blank may work.
- **Enter Your Email Address:** Some Exchange servers accept your email address as the username.
- **Enter Your Full Domain\UserName:** If the above options do not work, try using your domain credentials in the following format: domain\username.

Confirming the Connection

1. Click on Connect once all the details are entered.

Note: If you are unable to connect, we recommend reaching out to your IT team for assistance.

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.

Obtain your EWS URL by logging into your 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

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.
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.
3. Check the "**I understand...**" checkbox).
4. Complete the verification test and click **Verify** (Figure 3).
5. Click the **Perform Test** button.
6. Wait for the results and verify that the connectivity icon is green.
7. Click **Expand All**.
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.
11. Go back to your OnceHub Account and paste the EWS URL in the appropriate field in the connection box.

Managing Your OnceHub Integration With Microsoft Exchange Calendar

This guide explains how to navigate your Microsoft Exchange Calendar integration in OnceHub and manage related scheduling features effectively. Each section details specific functionality and provides instructions for customizing your workflow.

Accessing the OnceHub Integration with Microsoft Exchange

To manage your Microsoft Exchange integration:

1. Click on your profile picture in the top right.
2. Select **User Integrations** from the dropdown.
3. Click on the **Microsoft Exchange Calendar** tile.

Retrieving Busy Time from Exchange

You can use the **Busy Time Is Retrieved From** option to determine how OnceHub retrieves your busy time. This option lets you choose one or more sub-calendars, including:

- Sub-calendars you've created within your Exchange account.
- Calendars shared with your Exchange account, as long as they have at least Read-only permissions.

When are Exchange events treated as busy in OnceHub?

- **Free:** OnceHub will not read this time as busy.
- **Working elsewhere:** OnceHub reads this time as busy.
- **Tentative:** OnceHub reads this time as busy.
- **Busy:** OnceHub reads this time as busy.
- **Away:** OnceHub reads this time as busy.

If you are using Booking Calendars [New]

You can connect additional secondary calendars to retrieve busy times. For step-by-step guidance, refer to the **Connecting a Secondary Calendar article**.

Copying Meetings to Sub-Calendars

If you're using Booking Calendars

You can use the **Meetings Are Copied To** option to automatically copy meetings to specific sub-calendars. Whenever a meeting is scheduled, the specified sub-calendar(s) will be added as guests to the calendar event.

This option lets you choose one or more sub-calendars, including:

- Sub-calendars you've created within your Exchange account.
- Calendars shared with your Exchange account, as long as they have at least Read-and-write permissions.

Cancelling and Updating OnceHub Bookings Directly in Exchange

With the Two-Way Sync toggles, you can easily update bookings directly from your Exchange Calendar. The two toggles allow you to do the following:

1. **Cancel Meetings:** Cancel bookings by simply deleting the corresponding calendar event.
2. **Update Meetings:** Easily make adjustments to existing bookings directly from your Exchange calendar.
   - **Reschedule Meetings:** Change the time of a booking by moving it's calendar event.
   - **Allow Meeting Overlap:** Change your calendar event status to free or busy to define whether meetings can overlap.

Please see our article on **Allowing for Meeting Overlaps with Booking Calendars** if you would like to know how it works.

Caching Busy Time for Faster Scheduling

OnceHub stores your busy time temporarily, so it doesn't need to fetch updates from your calendar in real-time every time someone interacts with your booking links. This allows OnceHub to provide a faster and smoother scheduling experience.

Note: We only retrieve whether you're marked as busy or free on your calendar and do not access any event details, ensuring your privacy.

Configuring Default Exchange Calendar Reminders

You can customize how far in advance reminders should trigger for your Microsoft 365 calendar events. Use the **Default Exchange/Outlook Calendar Reminders** drop-down list to select a time interval that fits your preferences.

Connect OnceHub to Your iCloud Calendar

Connecting OnceHub to your iCloud Calendar ensures a real-time integration between your calendar and OnceHub.

How to Connect to Your iCloud Calendar

Follow these steps to connect your iCloud Calendar account:

Navigating to User Integrations

1. Click on your profile picture in the top right-hand corner.
2. Select **User Integrations**.

Connecting to Your iCloud Calendar

1. Click on the **iCloud Calendar** tile.
2. Click on **Connect**.
3. Enter your Apple ID and an App-specific password in the pop-up.
4. Click on **Connect**.

Note: An iCloud app-specific password is a unique password generated for third-party applications like OnceHub, which require access to your Apple ID.

To learn how to generate this password, refer to Apple's **Sign into apps with your Apple Account using app-specific passwords** article.

When connecting to your iCloud Calendar account, you might see an alert about the browser's pop-up blocker blocking the connection window.

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**

Managing Your OnceHub Integration With iCloud Calendar

This guide explains how to navigate your iCloud Calendar integration in OnceHub and manage related scheduling features effectively. Each section details specific functionality and provides instructions for customizing your workflow.

Accessing the OnceHub Integration with iCloud Calendar

To manage your iCloud Calendar integration:

1. Click on your profile picture in the top right.
2. Select **User Integrations** from the dropdown.
3. Click on the **iCloud Calendar** tile.

Retrieving Busy Time from iCloud Calendar

You can use the **Busy Time Is Retrieved From** option to determine how OnceHub retrieves your busy time. This option lets you choose one or more sub-calendars, including:

- Sub-calendars you've created within your iCloud Calendar account.
- Calendars shared with your iCloud Calendar account, as long as they have at least Read-only permissions.

When are iCloud Calendar events treated as busy in OnceHub?

- **Free:** OnceHub will not read this time as busy.
- **Busy:** OnceHub reads this time as busy.

Note: All-day events in iCloud do not have the option to be set as Busy. Instead of using an all-day event, we recommend creating a calendar event that's duration blocks out your working hours if needed.

If you are using Booking Calendars [New]

You can connect additional secondary calendars to retrieve busy times. For step-by-step guidance, refer to the **Connecting a Secondary Calendar article**.

Caching Busy Time for Faster Scheduling

OnceHub stores your busy time temporarily, so it doesn't need to fetch updates from your calendar in real-time every time someone interacts with your booking links. This allows OnceHub to provide a faster and smoother scheduling experience.

Note: We only retrieve whether you're marked as busy or free on your calendar and do not access any event details, ensuring your privacy.

Configuring Default iCloud Calendar Reminders

You can customize how far in advance reminders should trigger for your iCloud Calendar events. Use the **Default iCloud Calendar Reminders** drop-down list to select a time interval that fits your preferences.

Connect Your Video Conferencing App

Easily integrate video conferencing apps with your account to help automate your online meetings. This article outlines which apps can be connected and provides step-by-step guidance on how to connect.

Supported Video Conferencing Apps

Some video conferencing apps are automatically connected through your productivity suite, while others can be integrated as standalone tools depending on your needs.

Productivity Suite-Based Apps

These apps are automatically connected by integrating your productivity suite with OnceHub:

- **Google Meet (Google Workspace)**
- **Microsoft Teams (Office 365)**
- **Skype (Office 365)**

Standalone Video Conferencing Apps

These apps can be connected directly:

- Zoom
- GoToMeeting
- Webex

How to Connect Your Video Conferencing App

Navigating to User Integrations

1. Click on your profile picture in the top right-hand corner.
2. Select **User Integrations**.

Connecting Your Video Conferencing App

1. Click on the tile of the video conferencing app you want to connect.
2. Click on **Connect**.
3. Follow the instructions in the pop-up.

When connecting to your video conferencing app, you might see an alert about the browser's pop-up blocker blocking the connection window.

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**

Zoom: Custom dial-in numbers

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.
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.
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

Google Meet security best practices

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.

GoTo Meeting security best practices

At OnceHub, we designed our native GoTo Meeting 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 GoTo Meeting 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 GoTo Meeting, creating the meeting, and sending a separate email with the conferencing information. When a customer books with you, OnceHub automatically creates a meeting in GoTo Meeting 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 GoTo Meeting 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 GoTo Meeting'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.

Microsoft Teams security best practices

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.

Webex Meetings security best practices

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 **User Integrations** and then click on Webex.
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.

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 security best practices

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.

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.

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.

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.

Introduction to Booking Calendars [New]

Booking Calendars in OnceHub simplify scheduling by allowing you to share your availability so customers and prospects can easily book time with you - eliminating back-and-forth coordination.

What is a Booking Calendar?

A **Booking Calendar** lets you share your availability, allowing customers or colleagues to schedule meetings with you based on your predefined schedule. Whether you're coordinating with team members or scheduling client appointments, it simplifies complex scheduling needs.

For example:

- A consultant can share their **Booking Calendar** instead of exchanging multiple emails.
- Customers can choose a time slot based on real-time availability, reducing scheduling delays.

Key Benefits of Using Booking Calendars

- **Simplify Scheduling:** Allow customers to self-book based on your availability.
- **Prevent Scheduling Conflicts:** Sync with tools like Google Calendar and Microsoft 365 to avoid overlapping meetings.
- **Enhance Professionalism:** Provide a polished booking experience with customizable forms and automated notifications.

Core Features of Booking Calendars

- **Availability Management:** Set working hours and location preferences to control when clients can book meetings.
- **Customizable Booking Forms:** Collect essential details from clients before meetings.
- **Automated Notifications:** Send email and SMS reminders to keep clients informed.
- **Seamless Integrations:** Sync with tools like **Google Calendar**, **Zoom**, and **CRM platforms** for efficient scheduling.

Common Scheduling Scenarios

- **Single-User Scheduling:** Ideal for solo professionals where clients book directly with one person.
- **Team Scheduling:** Share a calendar for multiple team members or distribute meetings evenly across your team.

Get Started with Booking Calendars Today

Booking Calendars offer a streamlined way to manage meetings while ensuring professionalism and efficiency. Explore OnceHub's scheduling tools to enhance productivity and provide a seamless experience for your clients.

Configuring Your First Booking Calendar [New]

Booking Calendars simplify scheduling by letting you manage and share your availability, making it easy for guests to book time with you. This guide covers how to create, edit, and share your **Booking Calendar**, including embedding it on your website for client access.

As part of the onboarding process, a **personal Booking Calendar** is automatically created for you on your Home page. You can:

- **Use the Personal Calendar:** Customize the existing calendar to match your preferences.
- **Create a New Calendar:** Create a fresh calendar from the Booking Calendar Lobby.

The Booking Calendar Lobby also allows you to rename, duplicate, or delete calendars as needed.

Configure Basic Settings

To configure your Booking Calendar:

1. Open the Booking Calendar Lobby from the left-hand menu.
2. Select your existing calendar or click **Create booking calendar** on the right to start a new one.

Begin by setting up essential details for your calendar:

- **Set the Subject:** Enter a descriptive name for your **Booking Calendar** that reflects the type of meeting you're offering, such as "Client Consultations" or "Team Sessions."
- **Meeting Duration:** Choose the duration of the meeting (e.g., 15, 30, or 60 minutes).

The remaining settings in the **Booking Settings Tab** are configured automatically:

- **Hosts and Co-hosts:** You are automatically assigned as the host of the **Booking Calendar**.
- **Availability and location:** By default, your availability and location is pulled from your profile settings:
  - **Default Availability:** Initially, your calendar matches the availability set in your profile.
  - **Customizing Booking calendar-Specific Availability:** If the **Booking Calendar** requires unique availability, you can customize these settings directly within the calendar.
- **Time Slot Settings:** Define the spacing between available timeslots, choose how much advance notice you need, and how far in advance guests can book.

Default Booking Form Fields

Each Booking Calendar includes a customizable **Booking Form** with default fields to collect guest information. You can add additional fields in the **Booking Form Tab** as needed.

By default, the following fields are included in the **Booking Form**:

- **Full Name:** Collects the guest's name.

- **Email Address:** Used for sending booking confirmations and notifications.
- **Meeting Location:** If multiple meeting locations are set up in your account, guests will see options such as in-person, video, or phone during booking.
- **SMS Notifications:** If SMS notifications are enabled for the Booking Calendar, guests can opt in to receive booking-related messages during the scheduling process.

Default Guest Notifications

Each **Booking Calendar** comes with these standard guest notifications:

- **Meeting Confirmation**: Sent upon successful booking.
- **Meeting Reminder:** Reminds your guests of the upcoming meeting, sent by default 1 hour before the scheduled meeting.
- **Meeting Rescheduled:** Alerts guests of schedule changes.
- **Meeting Reassigned:** Notifies guests of a new host.
- **Meeting Cancellation:** Confirms meeting cancellations.

These notifications are configured automatically, but you can set up advanced notification workflows with additional options. For more on customizing customer notifications, see **Booking Calendar Guest Notifications**.

You can also configure the notifications you receive as a host or co-host in the **User Notifications** section of your profile.

Sharing Options

Make it easy for clients to schedule with you using these sharing options:

- **Share a Link:** Generate a direct link for clients or add it to your email signature.
- **Embed on Website:** Place the calendar on your website, allowing clients to book directly from your page.

For detailed instructions on how to share or embed your **Booking Calendar**, refer to the **Sharing and embedding your Booking calendar** help page.

Connecting Your Productivity Suite and Standalone Integrations [New]

Connecting your **Booking Calendars** to your productivity suites and standalone integrations is key to creating an efficient and streamlined scheduling experience. OnceHub integrates with Google Workspace, Office 365, and various standalone tools, ensuring all your systems work together smoothly.

Productivity Suites: Google Workspace and Office 365

Integrating with Google Workspace and Office 365 connects your scheduling tools to two of the most popular productivity platforms. These integrations allow you to:

- **Synchronize Calendars:** Automatically sync your availability and prevent double-booking across your calendars.
- **Send Booking Emails:** Use your personal email address to send booking notifications directly from your mailbox.
- **Generate Meeting Links:** Create and share virtual meeting links automatically for scheduled appointments.

How to Connect Your Suite:

- During the onboarding process, connect Google Workspace or Office 365 as prompted.
- If you skipped this step, navigate to your **Profile menu** in the top-right corner and select **User Integrations** to set it up.

By connecting your productivity suite, you ensure smooth communication and calendar management for every meeting.

Standalone Integrations

In addition to productivity suites, OnceHub offers integrations for calendars and video conferencing tools, helping you manage bookings across various platforms.

Calendar Integrations

Syncing your personal calendar with OnceHub ensures organized scheduling and avoids conflicts.

Benefits of Calendar Integration:

- **Real-Time Sync:** Bookings are automatically added to your connected calendar.
- **Conflict-Free Scheduling:** Retrieves busy times from your calendar to prevent overlapping bookings.

Supported Calendar Platforms:

- Exchange
- iCloud

Video Conferencing Integrations

Integrating third-party video conferencing tools simplifies the setup of virtual meetings.

These integrations save time by automatically generating and sharing meeting links for every appointment, while also improving communication by delivering meeting details directly to guests.

Supported Video Platforms:

- Zoom
- GoTo Meeting (GTM)
- Webex

How to Connect Standalone Integrations

1. Click on your profile picture in the top-right corner.
2. Click on **User Integrations**.
3. Select the desired integration and follow the provided step-by-step instructions.

Share and Embed Your Booking Calendar [New]

Once your **Booking Calendar** is set up, you can either **embed** it directly on your website, or you can use our **Page Designer** to customize and brand your own **standalone booking page** which you can then share with your customers.

Sharing Your Booking Calendar

You can use the **Page Designer** of your **Booking Calendar** to create a standalone page that you can customize and distribute via various channels.

When to Share as a Page:

Share your **Booking Calendar** as a standalone page if you want to:

- Share the calendar link via email, social media, or newsletters.
- Include the link to your email signature for quick access.
- Provide access outside your website, such as in PDFs or digital campaigns.
- Use the link for targeted campaigns, like webinars or consultations.

For a unified experience, you can group multiple Booking Calendars into a **Booking Hub**, allowing guests to access various calendars from a single location.

Key Features

Customization Options:

- Adjust background, text, and button colors to match your branding.
- Add images, logos, and a custom welcome message.
- Include links in the footer or welcome message for navigation or additional resources.

Live Preview (WYSIWYG): View real-time previews for both desktop and mobile as you design your Booking Calendar page.

Sharing Options:

- Customize the calendar URL to reflect your brand.
- Generate one-time or single-use links for added security.
- Create a QR code for business cards, flyers, or other promotional materials.

Personalization and Tracking:

- **Add UTM parameters** to track booking activity and campaign performance.
- **Pre-fill guest information** manually or via third-party tools.

Social Links:

- Add your social media links to dedicated clickable icons, allowing guests to easily navigate to platforms like your website, X (formerly Twitter), YouTube, and others.

Embedding

Embedding your **Booking Calendar** directly on your website allows clients to schedule appointments without leaving your site.

When to Embed on Your Website:

Embedding is ideal if you want to:

- **Enable direct booking:** Let clients schedule appointments directly on your website without being redirected.
- **Maintain a unified experience:** Display your services and booking options on the same page.
- **Boost engagement:** Keep visitors on your site longer by simplifying the scheduling process.
- **Streamline service-based journeys:** Perfect for businesses where scheduling is a core part of the user journey, such as salons, fitness centers, or consulting services.

Embedding helps service-based businesses create a smooth, professional booking experience while keeping clients engaged on their site.

How to Embed

1. Go to the **Embed Designer Tab** of the **Booking Calendar** you wish to embed.
2. Select a color scheme that matches your website's branding.
3. Click **Get the Code** (bottom right) to generate the embed code.

Creating Booking Calendar Booking Hubs [New]

Booking Hubs streamline scheduling by offering guests a single, centralized location to choose from multiple services or team members. This streamlined approach makes booking easier and enhances the guest experience, whether you're managing complex scheduling needs or providing flexible service options.

What Are Booking Hubs?

A **Booking Hub** combines multiple **Booking Calendars** into a single, easy-to-navigate interface for your guests. This unified display allows visitors to choose from multiple services or team members, making the scheduling process more versatile and intuitive.

Key Features of Booking Hubs

- **Centralized Scheduling:** Combine multiple **Booking Calendars** in one hub for easy guest access.
- **Customizable Branding:** Adjust the appearance to match your brand's style.
- **Flexible Sharing Options:** Share the hub via direct link, QR code, or embed it on your website.

Creating a Booking Hub

Follow these steps to create a **Booking Hub:**

1. Click on **Booking Hubs** in the left-hand menu.
2. Click on **Create booking hub**.
3. Enter a **Name** for the hub and assign an **Owner**, then click **Create**.
4. Choose the **Booking Calendars** you want to include and click **Apply** to begin customizing your hub.

Customizing Your Booking Hub

In the **Build Tab**, you can:

- **Add or Remove Calendars:** Click **Select items** to adjust the included calendars.
- **Reorder Calendars:** Drag and drop calendars to change the display order.
- **Edit Descriptions and Images:** Click each calendar to add a **Description** and **Image** in the right panel.

Sharing Your Booking Hub

Once your **Booking Hub** is ready, you can share it using:

- **Direct Link (Page Designer tab):** Share the link via email or social media for direct access.
- **QR Code (Page Designer tab):** Generate a scannable **QR code** for easy guest access.
- **Website Embedding (Embed Designer tab):** Embed the **Booking Hub** directly on your website, allowing

guests to book without leaving the page.

Get Started with Booking Hubs Today

Booking Hubs offer a powerful way to streamline scheduling for multiple services or team members. Customize your hub to match your brand, simplify scheduling, and provide a seamless booking experience for your clients.

Using Booking Calendars with Chatbots and Routing Forms [New]

Integrating your **Booking Calendar** with **Chatbots** and **Routing Forms** streamlines scheduling by asking relevant screening questions to qualify leads before committing your time and resources.

Benefits of Using Booking Calendars with Chatbots and Routing Forms:

- **Lead Qualification:** Ask tailored questions to identify the client's needs and route them to the appropriate **Booking Calendar** for scheduling.
- **Streamlined Scheduling Experience:** Clients can book appointments directly within the **Chatbot** or **Routing Form**, reducing friction and improving convenience.

Setting Up Booking Calendars in Chatbots

1. Click **Chatbots** in the left-hand menu.
2. Select the **Chatbot** you want to edit.
3. In the right-hand menu, scroll down to **Booking Calendar Action**.
4. Drag the **Booking Calendar Action** into your Chatbot workflow.
5. Use the **Select a booking calendar** dropdown to choose the desired calendar.
6. Click **Save**.

Setting Up Booking Calendars in Routing Forms

1. Click **Routing Forms** in the left-hand menu.
2. Select the **Routing Form** you want to edit.
3. In the right-hand menu, scroll down to **Booking Calendar Action**.
4. Drag the **Booking Calendar Action** into your Routing Form workflow.
5. Use the **Select a booking calendar** dropdown to choose the desired calendar.
6. Click on **Save**.

Image Gallery [New]

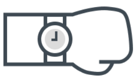
How to use the image gallery

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 so that you can use it when selecting an image for your OnceHub product features.

> **Note:**
>
> All images in this gallery are property of OnceHub and are protected under copyright law. Use is permitted for your OnceHub product features only.

Image gallery

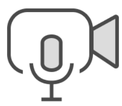
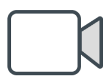
Duration

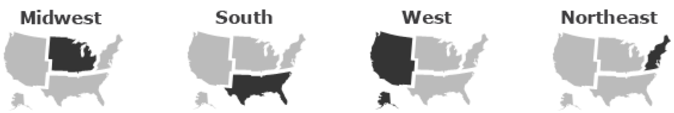


Location







Business

Services

Support

Queries

General

Are you looking for other icons? Please let us know.

Pre-filling Guest Information in Your Booking Calendar [New]

Pre-filling guest information on your Booking Calendar streamlines the process for both you and your guests. By reducing manual data entry, it saves time, minimizes errors, and enhances the overall booking experience.

Before starting, make sure you've mapped your Booking Calendar Questions to Fields. For guidance on mapping, refer to our **Mapping Booking Calendar Questions to Fields article**.

Enabling Personalization and Tracking

To create a pre-filled booking form link, follow these steps:

1. Click on **Booking Calendars** in the lefthand navigation menu.
2. Click on **Share** next to the Booking calendar you want to get a link for.
3. Check **Personalization and Tracking** in the popup.

Adding Tracking (Optional)

Under **UTM parameters** you can add your various UTMs that you use for tracking.

Configuring your pre-fill options

Under **Booking Form URL Parameters** you have 2 options for how you would like to pre-fill the booking form:

- **For a specific guest:** Manually enter guest information to populate the booking form when they use the shared link. Use this option if you already have the guest details available.
- **Via third-party tool:** Generate a booking link with placeholder text. Use this option if you want to populate guest information using third-party tools such as CRMs.

Finalizing the Link:

Once you have configured the parameters, click **Copy & Close** to generate and copy your pre-filled booking link.

Pre-filling the Booking Form for a Specific Guest

This method allows you to input a guest's information directly into the text fields representing your booking form's specific fields.

- Example: Enter details like **Name**, **Email Address**, or **Phone Number**.
- Once the guest uses the shared link to schedule an appointment, their pre-entered details will be auto-filled in the booking form.

Pre-filling the Booking Form Dynamically via Third party tools

For more dynamic needs, you can use the booking links with third-party tools like CRMs or marketing platforms:

1. Enable toggles for the fields you'd like to populate dynamically (e.g., Name, Email, etc.).

2. A placeholder (e.g., **Name=XXXX**) will appear in the generated booking URL.
3. Use automation in your third-party tool, such as a mail merge feature, to replace placeholders (**XXXX**) with actual guest data.
4. Deploy the customized booking link in your campaigns or workflows.
    - Once a guest clicks the link, their information will automatically populate the booking form.

Booking Calendar availability and location options [New]

With **Booking Calendars**, you have the flexibility to define when and where you're available to meet. This configuration can be tailored to suit different scenarios, ranging from simple weekly schedules to complex, multi-location setups. This guide will walk you through how availability and locations are managed in OnceHub.

Where Availability is Pulled From

Availability settings can be managed at two levels:

1. **Profile-Level Availability:**
   - By default, **Booking Calendars** use the availability set at the user profile level. This reflects your regular working hours and standard meeting locations.
   - To adjust profile availability, click your profile picture in the top-right corner and select **Scheduled meeting availability**.
2. **Booking Calendar-Level Availability:**
   - Each **Booking Calendar** can either inherit profile availability or be customized for specific needs.
   - This is useful for unique scenarios, such as accommodating different time zones, VIP clients, or team events.

Configuring Locations

OnceHub allows you to define meeting locations as:

1. **Virtual:** Video conferencing through connected tools like Zoom or Google Meet.
2. **Physical:** Specific addresses, office spaces, or meeting rooms.
3. **By Phone:** Where you initiate a phone call with the number they provided.

Combining Location Options

OnceHub lets you tailor meeting locations to suit different scheduling needs.

You can set up a hybrid approach with specific locations assigned to different days of the week or give your guests the flexibility to choose their preferred meeting type.

Hybrid Setup

Assign different location types to specific days of the week to accommodate a flexible work schedule.

- Example: A financial advisor could schedule in-office consultations from Monday to Wednesday, and then host virtual meetings via Zoom on Thursday and Friday.

Guest Choice

Allow your guests to select their preferred meeting location for the same time slot.

- Example: A consultant could offer the option of a virtual meeting on Google Meet or an in-person session at their office.
- Example: A therapist might let clients choose between a phone call or an in-person appointment at the clinic.

These approaches help you align your availability with your guests' preferences while accommodating a flexible work schedule.

Physical Locations and Resource Scheduling

Physical locations provide flexibility to accommodate simple setups, such as a single address, or more complex configurations with multiple rooms or resources.

Here are examples of how to use physical locations effectively:

Single Location

Set a single physical address as the meeting location. This option is ideal for businesses operating from one office or storefront.

- Example: A therapist schedules all in-person sessions at their main clinic address.

Dedicated Meeting Rooms

Assign multiple rooms within a physical location to efficiently manage your resources. Appointments are automatically booked in the next available room using pooled availability.

- Example: A co-working space allows clients to book private offices, shared desks, or conference rooms based on availability.

You can also include additional information such as parking instructions, building access codes, or directions, which will be shared with guests in their booking confirmation.

To learn more about using resource scheduling, please see **Booking Calendar room and resource scheduling**.

Date-Specific Overrides

Once you've established recurring availability and meeting locations, you can use **date-specific overrides** to manage unique scenarios. These overrides allow you to customize availability or locations for specific dates.

Examples of when to use Date-Specific Overrides:

1. **Time Off:** Remove availability for a week while you're on vacation.
2. **Temporary Location Changes:** Exclude a physical location if you're working remotely or traveling.
3. **Special Events:** Add a new physical location for meetings at a business convention.

You set this by clicking your profile picture in the top-right corner and then **Scheduled meeting availability**.

Customizing Availability and Locations for Multi-Host Booking Calendars

For **Booking Calendars** with multiple hosts, you can define shared or individual settings by selecting the **Customize availability and locations** option in the **Booking Settings Tab:**

- **For All Hosts:** Set unified availability and locations for all hosts and co-hosts.
- **For Some Hosts:** Customize availability and locations for each host individually.

Configuring Profile-Level Availability for Booking Calendars [New]

Control when clients can schedule meetings by defining your availability. This feature integrates with your connected calendar, and coordinates with Meeting Locations to specify when and where meetings can be scheduled.

For a guide on Meeting Locations, please see our **Meeting Locations for Booking Calendars article**.

Availability can be configured at two levels.

Availability can be retrieved from your user profile settings or customized on your Booking Calendar.

- **Profile-Level Availability:** Simplifies availability management when multiple Booking Calendars share the same schedule.
- **Booking Calendar-Level Availability:** Allows for unique schedules for individual Booking Calendars.

Each **Booking Calendar** can be configured to use either its own unique availability, or to inherit the availability defined in your profile.

Setting up Profile-Level Availability

When first setting up your availability, we recommend starting by configuring your default, recurring availability under your profile settings.

Accessing Your Scheduled Meeting Availability:

1. Click on the **profile icon** located in the top-right corner.
2. Select **Scheduled Meeting Availability** from the dropdown.

OnceHub offers two methods to manage your availability:

- **Weekly Working Hours:** Your default, recurring booking times.
- **Date-Specific Overrides:** Override your default availability for specific dates, such as for vacation days or special events.

Setting Your Weekly Working Hours:

Your account is preconfigured with default time slots from 09:00 to 17:00, Monday through Friday.

To modify these settings:

1. Click the **Edit weekly working hours** button.
2. Adjust the preset hours using the Add and Remove icons within the **Weekly Working Hours** tab.
3. For each time block, define the corresponding meeting location(s) by highlighting the location icon.

Customizing with Date-Specific Overrides (optional)

1. Navigate to the **Date-Specific Overrides** tab, accessible from either the **Weekly Working Hours** popup or the **Scheduled Meeting Availability** section.
2. Choose the date you wish to modify from the calendar on the left.
   - **Adjust Time Blocks:** Add or remove time blocks to override your standard hours.
   - **Change your Meeting Location:** Select or deselect location icons to override your meeting location.

To remove all availability for a specific day, simply remove all time blocks.

Saving Your Profile Settings

1. Once your availability is configured, click **Apply** to save the changes.

If you would like to set availability for specific Booking Calendar, please take a look at our **Configuring Availability for Specific Booking Calendars article**.

Configuring Availability for Specific Booking Calendars [New]

You can configure the availability settings for each Booking Calendar to either inherit your default user profile availability or define unique availability specific to that Booking Calendar.

We recommend that you set your profile availability as your standard availability for all Booking Calendars, making it easier to adjust if your regular work schedule changes. Then use Booking Calendar-specific availability to offer certain meeting types during unique hours that differ from your usual schedule.

In this article we will be covering how you can customize the availability for a specific Booking Calendar.

How to Access Your Booking Calendar Settings:

1. Click **Booking Calendars** in the left-hand menu.
2. Select the Booking Calendar you want to modify.
3. Navigate to the **Availability and Location** section from the **Booking Settings** tab.
   (Note: At least one host must be assigned to the Booking Calendar before this section is visible).

Customizing your Booking Calendar Availability

By default, your Booking Calendar inherits availability settings from your user profile.

To customize the availability for this specific calendar:

1. Select the **Customize availability and location** radio button.
   Upon selection, you will see two tabs:
   - **Weekly Working Hours:** Define your standard, recurring booking times here.
   - **Date-Specific Overrides:** Use this section to adjust your typical availability for specific dates.

NOTE: Remember that any availability settings you specify here for this Booking Calendar will override the default availability you've set in your user profile.

Defining Your Weekly Working Hours

The **Weekly Working Hours** tab allows you to define your standard booking schedule and the locations where those bookings will occur for this Booking Calendar.

How to modify your weekly working hours:

1. Click the **Edit** link in the **Weekly Working Hours** tab.
2. Use the Add and Remove icons to adjust the preset time blocks.
3. Define the **meeting location(s)** for each time slot by clicking the corresponding meeting location icon.
   (For more information on Meeting Locations, see the **Meeting Locations for Booking Calendars article**).
4. Click **Apply** to save the changes.

Customize with Date-Specific Overrides

The Date-Specific Overrides feature allows you to adjust your standard availability for specific dates. This is useful for accommodating events, holidays, or other instances where your regular schedule may not apply.

Learn more about date-specific overrides:

For detailed instructions on how to use this feature, see the following articles:

- **How to Extend your availability**

How to Extend Your Availability for One-Time Events [New]

To accommodate periods of high demand, such as seasonal peaks, you might need to temporarily offer more meeting availability than your usual schedule allows.

Booking Calendars allows you to easily extend your availability as needed. The following steps will guide you through the process.

Step 1: Determine Your Availability Level

First, determine whether your Booking Calendar is using your profile availability or whether availability is set directly on the Booking Calendar.

Follow these steps to identify where your availability is configured:

1. Open **Booking Calendars** from the left-hand menu.
2. Select the specific **Booking Calendar** you want to modify.
3. Locate the **Availability and Location** section under the **Booking Settings** tab.
   (This will indicate whether the Booking Calendar retrieves availability from the user profile settings or its own customized availability.)

Step 2: Access Date-Specific Overrides and Add Availability

Once you've identified where your availability is retrieved from, you can add extra meeting slots for specific dates using the **Date-Specific Overrides** feature.

If your availability is set at the Booking Calendar level:

1. Click on the **Date-Specific Overrides** tab.
2. Click **Add date override**.
3. Adjust your additional availability using the popup window.
   (This allows you to set specific times outside your regular schedule for the chosen dates.)
4. Click **Apply** to save and close the popup.
5. Click **Save** at the bottom of the Booking Calendar to save your changes.

If your availability is retrieved from the user profile settings:

Open the **Date-Specific Overrides** feature by following these steps:

1. Click on your **profile picture** in the top-right corner of your screen.
2. Select **Scheduled Meeting Availability** from the dropdown menu.

From here, the process for creating additional availability is the same as when managing it at the Booking Calendar level.

For more detailed instructions for managing or changing availability settings, refer to our **Availability for Booking**

Calendars article.

How to Block Availability for One-Time Events [New]

Sometimes, unexpected events like business travel or personal time off require you to block your usual meeting availability. With Booking Calendars, OnceHub makes it easy to adjust your schedule temporarily, so your availability reflects your current commitments.

There are **two simple methods** to block your availability:

1. **Using Your Connected Calendar**
   Create "Busy" events in your connected calendar (like Google or Outlook) to automatically block out your availability in OnceHub. **Learn how to block availability using your connected calendar**.
2. **Setting a Date-Specific Override in OnceHub**
   Customize availability directly in OnceHub for specific dates or times when you'll be unavailable. **Find out how to set up a date-specific override**.

Both options allow you to maintain control over your schedule and ensure a smooth booking experience for your invitees. Choose the method that best fits your needs, and reclaim your time when you need it most!

How to Block Availability for One-Time Events From Your Calendar [New]

There may be situations when you need to block off your usual meeting availability. For instance, you might be traveling for business or taking personal time off.

With Booking Calendars, blocking your availability from your connected calendar is simple.

Blocking Availability Using Your Connected Calendar

You can easily block availability using either your default connected calendar or a sub-calendar

Using Your Default Calendar

Blocking availability on your default calendar is straightforward:

1. Open your calendar application linked to your account.
2. Create a **"Busy"** event for the specific time slots you want to block.

By using your default calendar in this way, it will immediately block off your availability in OnceHub.

Using a Sub-Calendar

If you prefer not to clutter your default calendar, you can utilize an existing sub-calendar or create a new one specifically for blocking availability.

1. Create or designate a sub-calendar on your calendar application.
   - For example, name it "Blocked Availability".
2. Go to **User Integrations** in OnceHub.
3. Find the option labeled **Busy Time Is Retrieved From** and update this to use your sub-calendar.
   - This step ensures that the system retrieves availability information from the correct calendar.

Once set up, you can create **"Busy"** events on the sub-calendar just as you would on the default calendar. This method keeps your main calendar tidy and separates blocked time from other events.

Additional Help

If you need more detailed instructions for managing or changing availability settings, refer to our **Availability for Booking Calendars article** for further guidance.

How to Block Availability for One-Time Events in OnceHub [New]

There may be situations when you need to block off your usual meeting availability. For instance, you might be traveling for business or taking personal time off.

With Booking Calendars, you can easily block availability directly within OnceHub in just a few steps:

Step 1: Determine Your Availability Level

First, determine whether your Booking Calendar is using your profile availability or whether availability is set directly on the Booking Calendar.

Follow these steps to identify where your availability is configured:

1. Open **Booking Calendars** from the left-hand menu.
2. Select the specific **Booking Calendar** you want to modify.
3. Locate the **Availability and Location** section under the **Booking Settings** tab.
   (This will indicate whether the Booking Calendar retrieves availability from the user profile settings or its own customized availability.)

Step 2: Access Date-Specific Overrides and Remove Availability

Once you've identified where your availability is retrieved from, you can remove availability for specific dates using the Date-Specific Overrides feature.

If your availability is set at the Booking Calendar level:

1. Click on the **Date-Specific Overrides** tab.
2. Click **Add date override**.
3. Adjust your availability using the popup window.
   (This allows you to override specific times for the chosen dates.)
4. Click **Apply** to save and close the popup.
5. Click **Save** at the bottom of the Booking Calendar to save your changes.

If your availability is retrieved from the user profile settings:

Access the Date-Specific Overrides feature by following these steps:

1. Click on your **profile picture** in the top-right corner of your screen.
2. Select **Scheduled Meeting Availability** from the dropdown menu.

From here, the process for removing availability is the same as when managing it at the Booking Calendar level.

Note: To completely remove all availability for a specific day, simply remove all time slots.

Additional Help

If you need more detailed instructions for managing or changing availability settings, refer to our **Availability for Booking Calendars article** for further guidance.

Meeting Locations for Booking Calendars [New]

Meeting locations define where your guests can meet with you when scheduling an appointment. These options integrate with your availability settings, ensuring that the offered meeting locations are relevant for the selected time slots.

Meeting Location Types

You can offer three types of meeting locations:

Video Conferencing:

- Use connected tools like Zoom or Google Meet to conduct virtual meetings.
- Choose the type of video link you would like to use based on your preferences:
  - **Unique Links for Each Booking**: Generate a unique video link for every individual booking, ensuring each meeting has its own dedicated space.
  - **Static Link for All Bookings**: Use a single, pre-defined video link provided by your video conferencing tool for all meetings.
- Video links will automatically be added to both the calendar event, as well as the notification emails sent to you and your guest.

Phone:

- Initiate a phone call with your guest using their provided phone number.
- Guests will automatically be prompted to enter their phone number during booking.

Physical Location:

- Specify an address, office, or meeting room for in-person meetings.

Defining Availability for Locations

Meeting locations are set up along with your weekly recurring, or date specific availability, by selecting the location icon next to each availability time slot.

For detailed steps, see the **Configuring Availability for Booking Calendars article**.

Learn more about Physical Locations and Resource Scheduling

Physical meeting locations can be set up to accommodate various scenarios, ranging from a straightforward configuration using a single office calendar room to more complex setups involving shared workspaces.

To learn more about these options and how to manage resource scheduling, read the **Booking Calendar Room and Resource Scheduling article**.

Booking Calendar Room and Resource Scheduling [New]

Integrating **Booking Calendars** with your productivity suite's room directory simplifies the process of managing physical meeting spaces, such as meeting rooms or conference rooms. OnceHub allows you to connect room workspaces, ensuring that bookings align with room availability while eliminating scheduling conflicts.

Supported Platforms

- Microsoft 365 Room Workspaces.
- Google Workspace Room Workspaces.

How to Connect Your Room Workspace

Follow these steps to integrate room scheduling with your OnceHub account:

1. Click the gear icon in the top-right corner and then **Locations and Rooms**.
2. If no Location exists, click **Add location** and provide the address.
3. Select **Add rooms** and choose the workspace you wish to connect.
4. Click **Connect** and follow the on-screen instructions to complete the process.

How It Works

Once connected, you can create a **Location** in OnceHub and designate specific rooms for scheduling. Depending on your configuration:

- **Single Room:** Bookings are assigned to a specific room, with events automatically added to its calendar.
- **Multiple Rooms:** Bookings are dynamically allocated to any available room from the selected pool.

Key features include:

- **Conflict-Free Scheduling:** OnceHub reads busy times from the connected room calendars to prevent overlapping bookings.
- **Automated Updates:** Calendar events are created directly in the selected room's calendar for better coordination.

Using Rooms with Booking Calendars

After creating a **Location** and assigning its associated rooms, they will be available for use as physical meeting locations in **Booking Calendars**.

- **Access for Users:** All users can assign these Locations to their **Booking Calendars**.
- **Admin Management:** Only administrators can manage the Locations and Rooms lobby to configure room resources.

Benefits of Room and Resource Scheduling

1. **Optimized Resource Usage:** Dynamically allocate rooms to ensure efficient use of meeting spaces.
2. **Accurate Availability:** Prevent double bookings by automatically syncing room schedules with calendar events.
3. **Time-Saving Automation:** Eliminate manual room allocation with automatic booking and calendar updates.
4. **Customizable Configurations:** Tailor room setups for single or multiple resource scenarios based on your needs.

Connecting a Secondary Calendar [New]

Connecting a secondary calendar allows you to pull busy time from additional calendars, ensuring events like personal appointments are considered when managing bookings. For example, connecting your personal calendar as a secondary calendar can prevent bookings from overlapping with events such as doctor appointments or family commitments.

How to Connect a Secondary Calendar

Follow these steps to connect a secondary calendar:

Accessing User Integrations

1. Click on your profile icon located in the top-right corner of the screen.
2. Select **User Integrations** from the dropdown menu.

Connecting Your Calendar

1. Select the type of calendar you want to connect under **Available Integrations** (e.g., Google Calendar, iCloud Calendar).
2. Click on **Connect a secondary calendar**.
3. Follow the on-screen prompts to complete the calendar connection process.

Managing Your Secondary Calendar

Secondary calendars are used exclusively to retrieve busy time—OnceHub bookings can not be created in them directly. If your connected secondary calendar includes multiple sub-calendars, you can specify which sub-calendars should be used to pull busy time.

Follow these steps to manage your secondary calendar:

Accessing User Integrations

1. Click on your profile icon located in the top-right corner of the screen.
2. Select **User Integrations** from the dropdown menu.

Managing Your Secondary Calendar

1. Click on the tile representing the secondary calendar you want to manage.
2. Click **Edit** next to the option labeled **Busy Time Is Retrieved From**.
3. Use the checkboxes to choose which sub-calendars should be used to pull events indicating busy time.
4. Click **Save** to confirm your changes.

Additional Actions:

Disconnecting a Secondary Calendar: If you no longer wish to use the secondary calendar, you can disconnect it:

- Click **Disconnect** to remove the secondary calendar.
- Remember, disconnecting a secondary calendar will stop busy time retrieval.

Frequently Asked Questions (FAQs)

Can I connect more than one secondary calendar?

Yes, multiple secondary calendars can be connected as long as they are supported.

Can I connect different types of calendars, such as Google and Microsoft 365?

Yes, you can connect calendars of mixed types to pull busy time.

What happens if there's a connection issue with my secondary calendar?

If a connection error occurs:

- Busy time from the secondary calendar will temporarily not be retrieved.
- Bookings may overlap with events on the secondary calendar since only busy time from your primary calendar will be used.
- You will receive an email alert and see an in-app notification to help you reconnect the secondary calendar.

What happens if I disconnect my primary calendar?

If your primary calendar is disconnected, all secondary calendar connections will automatically be disconnected. You will need to reconnect both the primary and secondary calendars to resume pulling busy time.

Can I use this feature with Booking Pages?

No, the secondary calendar feature can only be used with Booking Calendars.

Booking Calendar Meeting Types [New]

Booking Calendars offer flexible meeting types to accommodate a range of scheduling needs, including **single-host**, **multi-host**, and **multi-guest** setups. Whether you're scheduling one-on-one meetings, team collaborations, or group sessions, these options ensure you can customize the booking experience for your requirements.

Meeting Types Overview

- **Single-Host Meeting (Pre-Assigned):** A specific host is designated upfront.
- **Single-Host Meeting (Dynamic):** The host is selected dynamically from a predefined Team.
- **Multi-Host Meeting (Pre-Assigned):** Specific hosts and co-hosts are assigned upfront.
- **Multi-Host Meeting (Dynamic):** Hosts and co-hosts are selected dynamically from a predefined Team.
- **Multi-Guest Meeting:** Allows additional guests to be included during booking.

Meeting availability and locations can be customized individually for each **Booking Calendar** or pulled directly from the host's profile settings, ensuring flexibility across all meeting scenarios.

Single-Host Meeting Types

Single-Host Meetings are ideal for sessions requiring only one host. These meeting types fall into two categories:

Pre-Assigned Single-Host Meetings:

A single designated host manages all meetings, ideal for solo professionals or service providers managing their own schedules.

Examples:

- **Consultations with a Specialist:** A fitness trainer offering one-on-one sessions.
- **Client Appointments:** A lawyer scheduling legal consultations.
- **Interview Scheduling:** A recruiter conducting candidate interviews.

Dynamic Selection Single-Host Meetings:

Dynamic selection single-host meetings use **Teams** to assign meetings to available team members based on predefined distribution methods, such as round-robin or load balancing.

Examples:

- **Customer Support Sessions:** Assign the next available support agent to a client query.
- **Sales Demos:** Rotate available sales representatives for product demonstrations.
- **Onboarding Calls:** Distribute new clients among onboarding specialists.

Multi-Host Meeting Types

Multi-Host Meetings are ideal for sessions requiring multiple hosts or co-hosts. These meeting types also fall into two categories:

Pre-Assigned Multi-Host Meetings:

Specific hosts and co-hosts are permanently assigned to a **Booking Calendar**, ensuring the same team members attend every meeting.

Examples:

- **Group Interviews:** A hiring committee interviewing a candidate together.
- **Customer Success Calls:** A customer success manager and sales development representative hosting a success call.

Dynamic Selection Multi-Host Meetings:

Hosts and co-hosts are dynamically selected from predefined teams using distribution methods based on availability or workload. Each **Booking Calendar** can assign multiple teams and distribution methods simultaneously.

Examples:

- **Technical Support Calls:** Assign both support agents and developers for advanced client queries.
- **Sales and Onboarding:** Schedule meetings with both a salesperson and an onboarding specialist.
- **Recruitment and Onboarding:** Schedule sessions with both a recruiter and an HR coordinator.

Multi-Guest Meeting Types

Multi-Guest Meetings allow clients to invite additional participants, such as colleagues, partners, or family members, during the booking process. This feature can be enabled using the **Additional Guests** option in the **Booking Form** settings.

Examples:

- **Couples Therapy Sessions:** A therapist hosting sessions for couples.
- **Family Consultations:** A school counselor meeting with parents and students.
- **Wedding Planning Meetings:** A planner meeting with a couple and their family.

By leveraging these **Booking Calendar Meeting Types**, you can create a tailored scheduling experience for any scenario—whether managing solo meetings, team collaborations, or group sessions. Customize your **Booking Calendar** settings to maximize flexibility, efficiency, and client satisfaction.

Setting up Booking Calendar Team Scheduling Scenarios [New]

Host and Co-Host(s) (Panel Meeting)

In a panel meeting setup, guests book a session where the host and co-hosts participate together in the same meeting.

Availability is determined by the time slots where all assigned users are available simultaneously.

How to set up a panel meeting

1. Open the Booking Calendars lobby by clicking on **Booking Calendars** in the lefthand side menu.
2. Click on the **Booking Calendar** you want to edit.
3. Use the **Add host and co-hosts** dropdown to select all users or **Teams** that should attend the booking, then click on **Add**.
    - If the Booking Calendar did not have a host before, a pop-up will appear to confirm who the host should be.
    - The email settings and **Meeting locations** that will be available for your guests to choose from is determined by the host you select.
    - You can change the host at any time in the **Host and co-hosts** section by clicking on the three dots to the right of the users added to the Booking Calendar and clicking **Set as host**.

After assigning your hosts, review the **Availability and Location** settings to ensure they align with your scheduling needs.

Distributed Meeting (Dynamic Host Selection)

Dynamic host selection uses a pre-created **Team** to distribute meetings among available members based on a chosen distribution method:

How to set up dynamic host meeting types

1. Open the Booking Calendars lobby by clicking on **Booking Calendars** in the lefthand side menu.
2. Click on the **Booking Calendar** you want to edit.
3. Use the **Add host and co-hosts** dropdown to the **Team** that should be used for bookings, then click on Add.
    - The email settings and **Meeting locations** that will be available for your guests to choose from is determined by the member of the **Team** that is being booked with.
4. Next you can choose the distribution method of the bookings for the **Team** right beneath the **Add host and co-hosts** dropdown.
    - **Any Available Team Member:** Ideal for offering guests the widest range of available time slots to choose from.
    - **Round Robin (Equal Distribution):** Perfect for ensuring an even distribution of meetings across your team.
5. Next you can click on **Manage** next to **Workload** to define a maximum number of bookings that a team

member can accept

These scenarios offer flexibility to match a variety of team structures and scheduling needs. Whether you’re managing a collaborative meeting, balancing team workloads, or providing centralized scheduling options, multi-host setups ensure a seamless experience for both guests and hosts.

Booking Calendar Meeting Distribution Options [New]

OnceHub Teams allows you to distribute meetings among team members, helping you:

- **Optimize Scheduling Efficiency:** Evenly distribute meetings without conflicts.
- **Balance Workloads:** Prevent overbooking for individual team members.
- **Enhance Guest Flexibility:** Allow guests to book based on shared team availability.
- **Improve Resource Management:** Tailor meeting distribution based on meeting type and team capacity.

Meeting Distribution Methods

Booking Calendars offers two primary distribution methods:

Any Available Team Member:

- Displays the combined availability of all team members in a single calendar view.
- Guests can select the time that best suits them from the shared availability.
- Assign priority levels so team members with higher priority are booked first when multiple members share the same time slot.

Round Robin (Equal Distribution):

- Automatically assigns meetings to team members in a balanced rotation.
- Only one team member's availability is shown at a time.
- Once a guest books with a team member, the system rotates to the next available member.

Creating Teams

You can create teams through the **Account Menu** or directly within a **Booking Calendar**.

From the Account Menu:

1. Click the **gear icon** in the top-right corner and select **Teams**.
2. Click **Add Team**.
3. Enter a **Team Name**, assign members, and click **Save**.

From a Booking Calendar:

1. Open the desired **Booking Calendar**.
2. Click the **Host and Co-Hosts** dropdown and select **Create New Team**.
3. Name the team, add members, and click **Save**.

Selecting Distribution Methods for Individual Booking Calendars

Once a team is created, you can customize the **Meeting Distribution Method** for each **Booking Calendar**:

1. Open the desired **Booking Calendar**.
2. Go to the **Host and Co-Hosts** dropdown.
3. Select the team and choose the preferred distribution method:

- **Any Available Team Member**
- **Round Robin (Equal Distribution)**

This flexibility ensures the meeting distribution aligns with the specific scheduling needs of each calendar.

Choose the set up that best aligns with your team's structure and scheduling needs for a more efficient, client-friendly booking experience.

Booking Calendar Time Slot Settings [New]

Time slot settings control how your availability is presented to clients, including when bookings can be made, how often time slots appear, and how far in advance meetings can be scheduled. Properly configuring these settings helps you manage availability effectively and avoid overbooking.

Accessing Time Slot Settings

1. Click **Booking Calendars** in the left-hand menu.
2. Select the **Booking Calendar** you want to edit.
3. Scroll to the bottom and click **Time Slot Settings**.

Lead Time

Lead Time determines how much advance notice is required before a meeting can be booked. This setting ensures you have enough time to prepare before each meeting.

Example: If you set a lead time of 1 day, clients will only see available slots starting 24 hours from the current time.

Timeframe Window

Timeframe Window controls how far in the future clients can book appointments, restricting availability to a specific time range.

This setting is useful when you want to avoid long-term bookings that may require adjustments closer to the meeting date, such as in industries where demand fluctuates.

- You have the option to set the window as a sliding window. This can be configured based on either a specified number of calendar days or bookable days in the future.
- Or, you can set a specific date range for once off timeframe windows.

Example: If you set a 30-day limit, clients can only schedule meetings up to 30 days from the current date. Beyond this period, no time slots will be available.

Time Slot Display

Time Slot Display determines the minimum gap between available booking times, as well on which minute marks slots should appear. For example, available time slots can be set to appear every 15 minutes, 45 minutes, or 2 hours.

It is useful when you have a large amount of availability and want to space out how often slots appear in the calendar. Note that it does not account for existing calendar events (see **Buffer Time** below).

Example: If you set the increment to 15 minutes and the start times to HH:00 & HH:15, available slots will appear at 9:00 AM, 9:15 AM, 10:00, 10:15 AM, and so on.

Buffer Time

Buffer Time adds a gap before and after each booked meeting to prevent back-to-back scheduling and allow preparation or travel between meetings.

Example: If you set a 30-minute buffer before and after each meeting, a 1-hour meeting scheduled at 10:00 AM will block availability from 9:30 AM to 11:30 AM.

Booking Calendar Workload Management [New]

Workload Management prevents team members from becoming overwhelmed by limiting the number of bookings they can receive per day, week, or month. This helps maintain productivity while ensuring a balanced workload.

How Workload Management Works

- **Set Booking Limits:** Specify the maximum number of bookings a team member can accept per day, week, or month.
- **Independent Per Calendar:** Each **Booking Calendar** has its own separate booking limit. Bookings made with **Calendar A** will not affect the limit for **Calendar B**, even if the same host is used in both calendars.

Where to Find the Setting

To Manage Workload Limits:

1. Click **Booking Calendars** in the left-hand menu.
2. Select the **Booking Calendar** you want to edit.
3. Navigate to the **Host and Co-Hosts** section in the **Booking Settings Tab**.
4. Click **Manage** next to **Workload** and adjust the limit as needed.

By setting workload limits, you can ensure that your team remains productive without becoming overburdened, creating a balanced and efficient scheduling process.

Booking Calendar Booking Forms [New]

The **Booking Form** gathers essential guest information to streamline the scheduling process. By default, it includes fields for **Full Name** and **Email**, as well as conditional fields for **Meeting Location** and **SMS notifications**. The form is also highly customizable, allowing you to collect additional information from guests.

Customizing Field Order and Labels

You can customize the **Booking Form** to better suit your needs by:

- **Editing Field Labels:** Change both the internal and guest-facing labels to clarify the type of information required.
- **Reordering Fields:** Drag and drop fields to rearrange their order.
- **Marking Required Fields:** Mark fields as required, which will display an asterisk (*) next to the field to indicate it must be completed.

Conditional Questions

Conditional Questions only appear on the Booking Form when specific settings are enabled in your account or Booking Calendar.

- **Location:** Appears when multiple meeting location options (e.g., physical address, phone call, virtual meeting) are configured for the host.

  You have the option to present these choices to your guests as either a dropdown list or radio buttons while they complete the booking form.

- **SMS Notifications:** Displays when **SMS notifications** are enabled, giving guests the option to opt in for text message updates.

Adding Additional Guests

You can allow guests to add up to 10 additional guests during the booking process. These additional guests will receive guest notification emails and be invited to the meeting.

To Enable Additional Guests:

1. Open the **Booking Calendar** you wish to edit.
2. Select the **Booking Form Tab**.
3. Drag the **Additional guests** question from the toolbar on the right into the form section.
4. In the right toolbar, choose which information should be entered when an additional guest is added.
   - Email address (Required)
   - Full name
   - Relationship

Adding Custom Questions

You can add extra fields to collect more information from your guests.

To Add a Question:

1. Open the **Booking Calendar** you wish to edit.
2. Go to the **Booking Form Tab**.
3. Drag the desired question type from the toolbar on the right into the form section.
4. Alternatively, click on a question in the toolbar to automatically add it to the bottom of the form.
5. Configure the question's settings and click **Save**.

Custom Question Options

You can add as many questions as needed and customize each one using the following settings:

- **Internal Label:** Only visible to internal users for organizational purposes.
- **Question Text:** The visible text displayed to guests on the **Booking Calendar**.
- **Answer Storage:** Choose whether the response is stored only in the booking details or **stored to a specific Custom Field** for use with downstream integrations.
- **Answer Required:** Decide if the question must be answered before the booking can be completed.

Question Types and Customization

- **Text Question:**
  - **Character Limit:** Set the maximum number of characters allowed in the answer.
  - **Hidden Field**: **Configure the question to be hidden from guests**, enabling you to pass internal information without exposing it to your guests.
- **Single Select and Multi-Select:**
  - **Answer Options:** Provide a list of options for guests to choose from.
  - **Question Style:** Choose whether the options appear as a **Dropdown List** or **Buttons**.
- **Phone:**
  - **Number capture:** Allows you to capture the guest's phone number without needing to enable SMS notifications.

Redirecting Guests to an External URL After Booking

You can redirect clients to an external URL after they complete their booking, which can be useful for:

- **Thank You Pages:** Redirect clients to a confirmation or thank you page.

- **Payment Pages:** Direct clients to complete payment after booking.
- **Survey Forms:** Collect feedback or additional details through a post-booking survey.

For steps on how to redirect to an external URL, please **click here**.

Mapping Booking Calendar Questions to Custom Fields [New]

In this guide, you will learn how to efficiently map questions in your Booking Calendar to save data in custom fields, as well as pre-fill your Booking Calendar with guest information using booking links.

For information on creating custom Contact Fields, please take a look at our **Fields Library article**.

Understanding Field Types

When mapping questions in your Booking Calendar, it's crucial to determine whether the data should be stored in a **Meeting field** or a **Contact field**. Here's how they differ and when to use each:

Meeting Fields

Use Meeting Fields for information that is unique to a specific meeting, such as:

- Details about the purpose or context of the meeting.
- Mapping data to **Salesforce Event** and **Case** fields.
- Mapping data to **Hubspot Meeting** fields.

Contact Fields

Use Contact Fields for information that identifies or describes the individual, such as:

- Personal details, like name and email.
- Mapping data to **Salesforce Contact** or **Lead** fields.
- Mapping data to **Hubspot Contact** fields.

How to Map a Question to a Field

Each Booking Calendar allows you to configure which Questions will be saved into a custom field using the following steps:

1. Open the **Booking Form Tab** of the Booking Calendar.
2. Select the **Question** you want to save to a custom field.
3. Select the field you want to map to using the **Field Mapping** dropdown in the pane on the right.
4. Click on **Save**.

Once completed, the responses to the mapped questions will be automatically saved in OnceHub and can be included in integrations with tools like Salesforce, Hubspot, or Zapier.

Pre-filling Information in Your Booking Calendar

After mapping your questions to fields, you can create customized booking links to pre-fill your guests' details. Pre-filled booking forms save time and reduce errors by avoiding the need for manual data entry. Within OnceHubyou have 2 options for how to pre-fill Booking Calendars for your guests:

- **For a specific guest:** Manually enter guest information into the booking link. Use this option if you already have the guest details available.
- **Via third party tool:** Toggle on placeholders for specific fields in the booking link. Then, use a mail merge or similar feature in your third-party tool (e.g., a CRM or email platform) to dynamically insert guest details.

Please take a look at our **Pre-filling Guest Information in Your Booking Calendar article** for a detailed guide.

How to Pass Booking Data using Hidden Fields [New]

Hidden fields in Booking Calendars allow you to add invisible text questions to your booking form. These fields are never shown to guests filling out the form, enabling you to pass internal data like campaign sources, tags, or known customer details discreetly.

This feature is particularly valuable for campaign tracking, lead tagging, and integrating customer information seamlessly into your workflows.

Key Benefits of Hidden Fields

- **Discreet Data Handling:** Pass internal data without displaying it to guests or relying on URL parameters.
- **Enhanced Tracking:** Simplify campaign tracking and lead tagging for marketing and operational needs.

How Hidden Fields Work

With any **Free Text** question in your booking form, you can enable the **Hide this question from visitors** toggle. This ensures that:

- The question will not be visible to guests filling out the form.
- The field remains hidden in the transcript in the guest's notification emails and the calendar event associated with the booking.

When you enable the **Hide this question from visitors** toggle, you can populate the hidden field data in two ways:

1. **Pre-Fill via URL:** Use the pre-fill feature to populate the hidden field dynamically through the URL. If data is pre-filled via URL, it will override any set fallback value.
2. **Fallback Value:** Set a default value that will be used if no data is provided via URL.

Note: When you toggle **Hide this question from visitors**, the **Answer required** toggle becomes unavailable. Since the question is hidden from guests, it's not possible to require an answer.

How to Create a Hidden Field

Here's how you can set up a hidden field in your booking form:

Navigating to the Booking Form Tab

1. Click on **Booking Calendars** in the left-hand side menu.
2. Select the Booking Calendar you want to modify.
3. Go to the **Booking Form** tab.

Creating the Hidden Field

1. Select **Free Text** in the **Add Questions** pane on the right.
2. Provide an internal label and enter the question text.
3. **Map the question to a field** using the **Field Mapping** dropdown.
4. Toggle on **Hide this question from visitors**.
5. (**Optional**) Enter a **Fallback value** to use in case no pre-fill data is provided.
6. Click **Save**.

Pre-Fill Hidden Fields Using a URL

You can pass information through a URL without displaying it to your guests.

To achieve this, first **map the question to a Field**. Once mapped, you can utilize our **Pre-fill feature to construct a URL** that includes the data you wish to capture in the hidden field, and then share this URL with your guests.

Sending Hidden Field Data to Third-Party Tools

Hidden field data can be mapped to Fields for integration with third-party tools like CRMs or automation platforms (e.g., Zapier).

To achieve this, first **map the question to a Field**. Once mapped, you can set up mapping for the third-party tool that includes the hidden field. For guides on setting up mapping for various third-party tools, please take a look at the following articles:

- **Integrating OnceHub with Salesforce**
- **Integrating OnceHub with HubSpot**
- **Automate Your Scheduling Workflow by using Zapier**
- **Automate Your Scheduling Workflow with Our API**

Using hidden fields enables you to pass valuable data silently while maintaining a clean and distraction-free experience for your guests. By combining fallback values, URL pre-filling, and third-party integrations, you unlock powerful possibilities for tracking, segmentation, and workflow automation.

Booking Calendar Guest Notifications [New]

Guest notifications in **Booking Calendars** keep clients informed by automatically sending confirmation and reminder messages related to their appointments. This guide explains how to configure standard notifications and create custom workflows for more personalized communication.

Default Guest Notifications

Each **Booking Calendar** includes standard notifications that are automatically set up to keep guests informed about their bookings. These default notifications ensure that guests receive essential updates without requiring additional setup.

Standard Notifications (Automatically Enabled):

- **Meeting Confirmation:** Sent immediately after a booking is made to confirm appointment details.
- **Meeting Reminder:** Sent, by default, 1 hour before the scheduled meeting.
- **Meeting Rescheduled:** Notifies clients when the meeting date or time is changed.
- **Meeting Reassigned:** Alerts clients when the meeting host changes.
- **Meeting Cancellation:** Informs clients when a meeting has been canceled.

These default notifications provide a consistent client experience, ensuring that clients stay updated throughout the booking process. You can customize these notifications or create advanced workflows for more tailored communication.

Creating a Custom Notification Template

For more control over the timing and content of notifications, you can create a **Custom Notification Template**. This allows you to set multiple notifications at different stages of the booking lifecycle, including multiple reminders.

To Create a Custom Notification Template:

1. Click the gear icon in the top-right.
2. Select **Guest Notifications** from the dropdown**.**
3. Click **+ New notifications template**.
4. Enter a **Template Name** and click **Create**.
5. Choose your notification types: **Email**, **SMS**, or both by checking the appropriate boxes for each stage of the booking lifecycle.

Adding Meeting Reminders:

- Add up to **3 reminders** for both **Email** and **SMS** by clicking **+ Add reminder**.
- Specify the reminder timing using the dropdown menu.

SMS Consent:

If you include **SMS notifications** in your notification template, a consent checkbox will automatically appear on the **Booking Form** to collect the guest's phone number and consent. Without consent, SMS notifications will not be sent.

Your new account comes with 25 complimentary SMS credits, and additional credits can be purchased in the billing section as needed.

Customizing Emails:

- Click **Customize email** to personalize the subject line and message body.
- Align the content with your brand's tone and style.

Note: Only account administrators can create or edit **Custom Notification Templates**. Member users can apply existing templates to their **Booking Calendars** but cannot modify them.

Email Customization Options

Personalizing your notification content ensures guests receive relevant information in a professional format aligned with your brand.

You Can Customize:

- **Text Formatting:** Font size, Bold, Italics, Underline, Strikethrough, Font Color
- **Layout Formatting:** Content Align, Bulleted List, Numbered List
- **Free Text Sections:** Add custom messages, instructions, and images.
- **Variables:** Insert dynamic details like guest names, meeting times, or rescheduling links.

Using Variables in Guest Notifications:

When customizing the email template, simply type **@** to access a list of available variables. From this list, you can select a variable to automatically populate the email with the relevant guest or meeting details. Both **system fields** (predefined fields) and **custom fields** (fields you've created) can be used as variables.

Please read our **Mapping Booking Calendar Questions to Fields article** if you want to learn how to map questions from your Booking Calendars to Fields so that they can be used in your guest notifications.

Examples of Variables:

- **Contact Data:** Full name, Email address, Phone number
- **Meeting Data:** Date, Time, Reschedule link

Testing and Activating Your Notifications

To ensure your notifications work correctly, test them before applying them to live calendars.

To Activate and Test Notifications:

1. Click **Booking Calendars** in the left-hand menu.
2. Select the **Booking Calendar** where you want to apply the workflow.
3. Go to the **Notifications Tab**.
4. Select your custom template from the dropdown menu and click Save.

5. **Test Your Setup:** Create a test booking to verify notifications are received as expected.

Booking Calendar User Notifications [New]

User notifications, help hosts stay informed about booking-related events. Notifications can be sent via SMS or email. This guide explains how to configure your notifications to suit your preferences and manage them effectively.

What Are User Notifications in OnceHub?

User notifications are alerts sent to hosts to inform them about important booking events, such as scheduled meetings, cancellations, or reminders. Notifications are customized for each host in their Profile to ensure they only receive relevant updates.

Notification Methods: SMS and Email

Notifications can be sent using the following methods:

1. **Email Notifications (Primary Method):**
   - Email is the default and primary method for sending notifications.
   - Hosts can receive detailed updates directly in their inbox, ensuring they stay informed even without access to their phone.
2. **SMS Notifications (Optional):**
   - SMS can be enabled as a supplementary method to ensure urgent notifications are received promptly.
   - SMS messages will be sent to the mobile number provided in your profile.

Customizing Your Notification Preferences

Tailor your OnceHub notifications to stay informed about your scheduled events.

To customize your notifications:

1. **Go to your Notification Settings:**
   - Click your profile icon in the top right corner.
   - Select **User Notifications** from the dropdown.
2. **Choose your notification methods:**
   - Use the checkboxes to select email, SMS, or both for each notification type.
   - Notification types include:
     - Meeting scheduled

- Meeting rescheduled
- Meeting reminder
- Meeting reassigned
- Meeting canceled

3. **Set up SMS notifications:**
   - Enter your mobile number in the **Mobile Number** field at the bottom of the **User Notifications** section to receive SMS alerts.

Creating Booking Notifications for Your Team

Stay informed about booking activities across your team using the **Alert Center**. This feature lets you create alerts for specific booking lifecycle events, such as confirmations, cancellations, or reschedules. You can also choose who receives these alerts, ensuring key updates are delivered to the right team members.

To learn about setting up and managing alerts, visit the **Alert Center Help Article**.

Important Notes

- **Email Priority:** Email notifications are the preferred method and are typically used for detailed updates.
- **SMS Notifications:** Enabling SMS notifications requires SMS credits, which can be purchased separately. To learn more, visit our **SMS Credits in OnceHub article**.
- **Flexibility**: Hosts can choose the combination of notification methods that work best for their needs.

Calendar Events in Booking Calendars [New]

Calendar events are an indispensable tool for keeping your bookings organized and professional. They save time, ensure attendees have all the critical details, and enhance your workflow.

With OnceHub, every booking automatically generates a calendar event in the User's connected calendar, while also adding the guest, as well as any other attendees, for a smooth scheduling experience.

If your calendar is not yet connected to OnceHub, we recommend reviewing our **guide** for detailed instructions on how to set it up.

Customizing Calendar Events in Booking Calendars

Customizing calendar events ensures that your bookings include clear, personalized details for you and your guests. Whether you need to make adjustments to event titles, add dynamic information, or exclude specific details, **Booking Calendars** provides versatile options to manage event notifications effectively.

1. **Accessing the Booking Calendars Section**
    - Navigate to **Booking Calendars** in the left-hand menu.
2. **Selecting a Calendar**
    - Choose the specific Booking Calendar you want to edit.
3. **Customizing the Template**
    - Open the **Notifications** tab to control and customize how calendar events are generated. Within this tab, you have two key options:
        - **Exclude Guests:** Check the **Exclude guests** box to exclude guests from the calendar event when necessary.
        - **Customize the Calendar Event:** Click **Customize** to modify the calendar event to better suit your needs.
4. **Saving Your Updates**
    - After completing your changes, click **Save** to confirm and apply the updates.

Customization Options

Booking Calendars allows you to tailor calendar events with a range of options for adding context and relevant details to every booking notification.

What You Can Customize

- **Free Text Sections:** Include custom messages or instructions tailored to the event.

- **Variables:** Use variables to dynamically populate event details such as guest names, booking times, or rescheduling links.

Using Variables in Calendar Events

When customizing your calendar template, simply type **@** to access a list of available variables. From this list, you can select a variable to automatically populate the calendar event with the relevant guest or meeting details. Both **system fields** (predefined fields) and **custom fields** (fields you've created) can be used as variables.

Please read our **Mapping Booking Calendar Questions to Fields article** if you want to learn how to map questions from your Booking Calendars to Fields so that they can be used in your guest notifications.

Examples of Variables:

- **Contact Data:** Full name, Email address, Phone number
- **Meeting Data:** Date, Time, Reschedule link

Booking Calendar Redirect [New]

The **Booking Calendar redirect** feature allows you to redirect guests to an external URL after they complete a booking. This is useful for:

- **Thank You Pages:** Redirect guests to a confirmation page after booking.
- **Payment Pages:** Direct guests to complete payment after booking.
- **Survey Forms:** Collect feedback or additional information post-booking.

How to Set Up Redirects

To Set Up a Redirect After Booking:

1. Click **Booking Calendars** in the left-hand menu.
2. Select the **Booking Calendar** you want to edit.
3. Go to the **Booking Form Tab**.
4. Scroll to the bottom and locate **Redirect to an External URL**.
5. Toggle the option **On** to enable redirection.

Specify a Custom URL for Each Scenario:

In the right-side toolbar, you can specify unique URLs for the following actions:

- **After guest schedules:** Direct guests to a confirmation page.
- **After guest reschedules:** Redirect guests to a page confirming the updated meeting time.
- **After guest cancels:** Guide guests to a cancellation confirmation page.

Send Meeting Information to the Redirected Page

You can use the **Include mapped fields data on redirect page** toggle in the right-side toolbar to send the following data via URL to the page that is redirected to:

- Booking Calendar ID
- Meeting subject
- Meeting status
- Meeting creation time
- Meeting starting time
- Guest name and email
- **Questions mapped to fields**

By using **Booking Calendar redirects**, you can guide guests seamlessly to the next steps after booking, improving the overall scheduling experience and ensuring follow-up actions are completed smoothly.

Adding UTMs to Your Booking Calendar [New]

UTM parameters are tags added to your booking links to track booking sources, refine marketing, and boost bookings. By understanding where your bookings originate, you can tailor your marketing strategies for maximum effectiveness.

Add UTMs to your Booking link when sharing as a Page

Follow the steps below to add UTM parameters when sharing your **Booking Calendar** as a standalone page:

1. **Navigate to the Booking Calendar Lobby:**
   - Open the **Booking Calendars Lobby**.
   - Locate the **Booking Calendar** you wish to share.
   - Click the **Share** button associated with that calendar.
2. **Enable UTM Parameters:**
   - In the pop-up window, check the **UTM Parameters** checkbox.
3. **Enter Your UTM Values:**
   - Enter the appropriate values for each UTM parameter (e.g., utm_source, utm_medium, and utm_campaign).
4. **Copy and Share:**
   - Click **Copy & close** to copy the URL with UTM parameters to your clipboard.

You can now share this URL with your guests.

Adding UTMs to your personal webpage where you have an embedded Booking Calendar

Follow the steps below to add UTM parameters to your **Booking Calendar** which is embedded directly on your website:

1. **Begin UTM Parameters:**
   - Add a question mark (?) to the end of your webpage URL. This marks the beginning of your UTM parameters.
2. **Enter UTM Parameters:**
   - Add your desired UTM parameters immediately after the question mark.
   - Format each parameter as parameter=value.
   - Example: utm_source=LinkedIn.
3. **Include Additional UTM Parameters (if applicable):**
   - If you need to add more UTM parameters, separate them with an ampersand (&).
   - Example: &utm_medium=Social&utm_campaign=JanuaryPromo.

- The resulting URL will resemble: https://yourwebsite.com?utm_source=LinkedIn&utm_medium=Social&utm_campaign=JanuaryPromo.

Use this full URL to direct visitors to your site with the added UTM tracking.

Key Points to Remember:

- **Consistency is Key:** Maintain consistent naming conventions for your UTM parameters across all campaigns
- **Accurate Values:** Ensure the values you enter accurately reflect the source, medium, and campaign of your link.
- **Testing:** Always test your UTM parameters by clicking on the generated URL and verifying the data is being recorded correctly in your analytics platform.

Adding UTM parameters provides vital data that helps you understand the effectiveness of your marketing efforts. This data enables you to make informed decisions, optimize your campaigns, and ultimately drive more bookings.

Managing Guest Activities [New]

Activities is the centralized hub where you can manage all guests' activities. It provides advanced filtering options to quickly locate the information you need and create valuable datasets that can serve as the foundation for creating comprehensive reports.

Furthermore, **Activities** allows you to execute various actions, including managing meetings, reviewing chatbot conversations, and viewing routing form responses.

Accessing Activities and Viewing Details

To access **Activities** click on **Activities** in the left-hand navigation menu.

Once inside the **Activities** section, you'll see a list of all guest interactions. Each activity contains details such as activity type, time, and status.

- By clicking on any activity, you'll open the Details pane, which shows all information captured for that specific activity.
- The Contact Details pane on the right displays a summary of the guest's information along with their recent activity history.

Viewing Related Activities

Sometimes you'll need to trace how an interaction evolved, such as seeing a rescheduled meeting or a cancellation associated with a specific activity. Here's how to do that:

1. Click on the activity you'd like to investigate.
2. Click on the three-dot menu at the top of the activity's Details pane .
3. Select **View related activities** from the dropdown menu.

This will display any connected activities, providing you with a clearer context of the guest's interaction timeline.

Managing Meetings in Activities

Activities allows you to take several important actions to manage your meetings efficiently. For more information about each action, please take a look at the articles linked below:

- **Cancel Meetings:** Cancel a meeting directly from the Activities section if the meeting is no longer needed.
- **Reschedule Meetings:** Either reschedule a meeting on behalf of the guest or send them a request to choose a new time.
- **Reassign Meetings:** Assign the meeting to another user on your account to ensure the right team member handles the interaction.
- **Allow Meeting Overlap:** Select whether a specific meeting can be scheduled over to accommodate double bookings.
- **Mark Meetings as No-Show:** If a guest misses a meeting, you can mark it as a no-show to maintain accurate

attendance and reporting records.

Using Activities for Reporting

Activities isn't just for managing interactions, it's also a powerful tool for reporting. Make use of the following features to generate and export data:

- **Advanced Filtering:** Apply filters to narrow down activities based on criteria like meeting type, date range, or status. This helps you focus on specific data quickly.
- **Export Datasets:** After applying filters, export a dataset containing all the relevant activities. You can use this for reports, record-keeping, or sharing with team members.

Cancelling Meetings Made with Booking Calendars [New]

Managing meeting cancellations effectively ensures that all parties are informed and updated. This article will help you to understand the effects of cancelling meetings and how to properly cancel them.

Effects of Cancelling a Meeting

When a meeting that was made using a Booking Calendar is cancelled:

- **Calendar Update:** The calendar event's status changes to **free**, and **CANCELLED** is added to the event title for easy identification.
- **Guest Notification:** Cancelation notifications are sent to the guest based on the **Guest notification template** that was used by the Booking Calendar.
- **User Notification:** Cancellations notifications are sent to the hosts based on their **User Notifications** settings.

How to Cancel a Meeting from Your Connected Calendar Application

If you are using the Two-Way Sync feature found within **User Integrations** in your account, you can cancel a meeting directly from your connected calendar.

1. Open your calendar application.
2. Locate the scheduled event for the meeting.
3. Delete the event to cancel the meeting.

Once deleted, the cancellation will sync automatically with OnceHub and notify the relevant parties.

Note: This feature is not available for hosts that make use of iCloud Calendars.

How to Cancel a Meeting from Within OnceHub

You can also cancel a meeting directly in OnceHub through the following steps:

Navigating to the Meeting

1. Click on **Activities** in the left-hand navigation menu.
2. Select the meeting you want to cancel from your list of activities.

Canceling the Meeting

1. Click the **Cancel** button near the top of the meeting information pane.
2. Enter a **Cancellation Reason** in the pop-up.
3. Click **Cancel the meeting** to confirm.

Reassigning Meetings Made with Booking Calendars [New]

Managing meeting reassignments effectively ensures that all parties are informed and updated. This article will help you to understand the effects of reassigning meetings and how to properly reassign them.

Note: Meeting reassignment is only available on selected plans..

Effects of Reassigning a Meeting

When you reassign a meeting that was made using a Booking Calendar, several updates occur automatically. Here's what to expect:

- **Calendar Update:** The original calendar event is deleted, and a new calendar event is created using the new host's integrated calendar.
- **Guest Notification:** Reassignment notifications are sent to the guest based on the **Guest notification template** that was used by the Booking Calendar.
- **User Notification:** Reassignment notifications are sent to the hosts based on their **User Notifications** settings.

How to Reassign a Meeting to a New Host

Follow these steps to smoothly reassign a meeting to a new host while ensuring all relevant details are updated.

Navigating to the Meeting

1. Click on **Activities** in the left-hand navigation menu.
2. Select the meeting you want to reassign from your list of activities.

Reassigning the Meeting to a new Host

1. Click the **Reassign** button near the top of the meeting information pane.
2. Select the new host in the pop-up.
3. Click on **Next**.

Updating the Meeting Location

When reassigning you can decide how to manage the Meeting location:

- Keep the original location
- Generate a new meeting link using the new host's video conferencing integrations.

Confirming the Reassignment

Once you've selected your preferred location option, click **Reassign** to confirm the changes.

Rescheduling Meetings Made with Booking Calendars [New]

Managing meeting reschedules effectively ensures that all parties are informed and updated. This article will help you to understand the effects of rescheduling meetings and how to properly reschedule them.

Effects of Rescheduling a Meeting

When you reschedule a meeting that was made using a Booking Calendar, several updates occur automatically. Here’s what to expect:

- **Calendar Update:** The calendar event is updated to the new time slot.
- **Guest Notification:** Notifications about the reschedule are sent to the guest based on the **Guest notification template** that was used by the Booking Calendar.
- **User Notification:** Notifications are sent to the hosts based on their **User Notifications** settings.

How to Reschedule a Meeting on Behalf of the Guest

OnceHub simplifies rescheduling meetings. If you've already discussed a new time or are currently on a call with your guest, you can easily reschedule on their behalf.

Rescheduling a Meeting from Within OnceHub

You can reschedule a meeting directly in OnceHub by following these steps:

Navigating to the Meeting

1. Click on **Activities** in the left-hand navigation menu.
2. Select the meeting you want to reschedule from your list of activities.

Rescheduling the Meeting

1. Click the **Reschedule** button near the top of the meeting information pane.
2. Select **Reschedule on behalf of the guest**.
3. Click on **Next**.
4. Select the new date and time for the meeting.
5. Provide the **Reschedule reason**.
6. Click on **Reschedule** to confirm.

Rescheduling a Meeting from Your Connected Calendar Application

If you are using the Two-Way Sync feature found within **User Integrations** in your account, you can reschedule a meeting directly from your connected calendar.

1. Open your calendar application.
2. Locate the scheduled event for the meeting.
3. Move the event to the desired time slot to update the meeting.

The change will sync automatically with OnceHub and notify the relevant parties.

Note: This feature is not available for hosts that make use of iCloud Calendars.

How to Send a Reschedule Request to your Guest

Should you need to reschedule a meeting with your guest and are unsure of their availability, you can send them a reschedule request, allowing them to choose a new time at their convenience.

Navigating to the Meeting

1. Click on **Activities** in the left-hand navigation menu.
2. Select the meeting you want to reschedule from your list of activities.

Rescheduling the Meeting

1. Click the **Reschedule** button near the top of the meeting information pane.
2. Select **Ask the guest to reschedule**.
3. Click on **Next**.
4. Provide the **Reschedule Reason**.
5. Click on **Cancel and request reschedule** to send the request to them.

After the request is sent, the original meeting will be cancelled and the calendar event updated. A new meeting will be created once the guest books using the request notification that was sent to them.

Allowing for Meeting Overlaps with Booking Calendars [New]

The **Meeting Overlap** feature empowers you to accept new meetings, even if they occur simultaneously with existing scheduled meetings. This functionality provides enhanced flexibility, productivity, and booking efficiency. Below, we outline the benefits, functionality, and steps to enable meeting overlaps either directly within OnceHub or through your connected calendar.

Benefits of Meeting Overlap

- **Maximize Productivity and Revenue:** Keep your calendar optimized by addressing no-shows and increasing the number of qualified meetings you conduct.
- **Enhanced Flexibility:** Dynamically manage your schedule by accepting meetings, even when slots are occupied.
- **Increased Booking Capacity:** By freeing up overlapping time slots, you can boost the total meetings booked.
- **Seize Opportunities:** Never miss a potential meeting simply because a time slot appears occupied.

How it works

The Meeting Overlap feature gives you control over whether already existing scheduled meetings can be booked over or not. This setting determines if new meetings can be scheduled during overlapping time slots.

- You can configure overlap settings on a per-meeting basis within the **Activities** section in OnceHub.
- If your account uses the **Two-Way Sync** integration with a connected calendar, status updates (such as marking an event as Free or Busy) will be automatically synced to OnceHub.

Note: This feature only works with one-on-one Meetings.

How to Allow for Meeting Overlaps from Within OnceHub

You can easily allow for meeting overlaps directly in OnceHub through the following steps:

Navigating to the Meeting

1. Click on **Activities** in the left-hand navigation menu.
2. Select the meeting you want to reschedule from your list of activities.

Setting the Overlap Meeting preference

Use the **Meeting Overlap** feature within the meeting's details pane to choose if the overlap is allowed.

- **Not Allowed:** Disallow meetings from overlapping with the existing meeting.
- **Allowed:** Allow new meetings to be scheduled even if they overlap with the existing meeting.

How to Allow for Meeting Overlaps from Your Connected Calendar Application

If you are using the Two-Way Sync feature found within **User Integrations** in your account, you can allow for overlaps directly from within your connected calendar.

Toggling on Two-Way Sync in OnceHub

1. Click on the gear icon in the top-right.
2. Select **User Integrations** from the dropdown.
3. Click on your primary calendar integration tile.
4. In the **Two-Way Sync** section, toggle on **Updating the meeting in [calendar application] updates the meeting in OnceHub**.

Updating the Event in Your Calendar Application

1. Open your calendar application.
2. Locate the scheduled event for the meeting.
3. Change the event's status to update the meeting.
   - **Busy:** Disallow meetings to overlap with the existing meeting.
   - **Free:** Allow new meetings to be scheduled even if they overlap with the existing meeting.

The change will sync automatically with OnceHub.

Note: This feature is not available for hosts that make use of iCloud Calendars.

Filtering Your OnceHub Activities [New]

OnceHub provides a powerful filtering feature that enables you to easily find and analyze the activities of your guests who have interacted with your OnceHub products. Use filters to narrow down your search and save time by focusing on the most relevant activities.

Activities can be accessed by clicking on **Activities** in the left-hand navigation menu

Free Text Filter

The Free Text filter, located in the top-left corner of the **Activities**, allows you to search for activities like meetings or form submissions that include specific text.

How to Use the Free Text Filter

- Simply type any text into the filter box to find activities that match your query.
- For more precise filtering, use specific search operators as described below:

Search Operators for Free Text Filter:

- **OR Operator:** Use **OR** to search for multiple terms. Results will include activities containing either or both terms.

  Example: “John@example.com **OR** Bob@example.com” will return matches for activities involving either email address.

- **AND Operator:** Use **AND** to combine filters and retrieve activities that meet all specified conditions.

  Example: “Scheduled **AND** Reassigned” will return activities that are both scheduled and reassigned.

Advanced Filter Options

Advanced filters offer more specific criteria to narrow down your search.

How to Use Advanced Filters

1. Click the filter box next to the Free Text filter.
2. Select one or more filters to limit the results according to the chosen parameters.

Note: You can further refine your search by combining multiple advanced filters or applying the Free Text filter alongside them.

Custom Filters

If you frequently use certain filter combinations, you can save them as Custom Filters for quick access in the future. Saved filters allow you to reproduce the same search criteria without needing to manually re-enter the details every time.

Saving a Custom Filter:

1. Apply the desired filters in Activities.
2. Click the **Save as** link next to the applied filters.
3. Enter a name for your new filter in the pop-up window.
4. Click **Save new filter** to finalize.

Accessing Custom Filters:

Your saved filters are stored in the Custom Filters section on the left-hand menu of the Activities page.

Exporting Your OnceHub Activities [New]

Our export feature allows you to generate a dataset of all guest activities in your account, with optional filtering to help you refine the data as needed. This guide will detail the export process, providing you with a valuable dataset that can serve as the foundation for creating comprehensive reports.

Available Export Formats

Reports can be exported in the following formats:

- CSV
- Excel

Refining Your Dataset Before Exporting

To ensure your exported dataset includes only the data you need, you can apply filters to narrow down the records. For more details on filtering options, refer to our **Filtering Your OnceHub Activities article**.

How to Export Activities

Navigating to the Activities

1. Click on **Activities** in the left-hand navigation menu

Applying Filters (Optional)

1. Apply filters or select a Custom filter as required.

Exporting the Activities

1. Click on **Export** in the top-right corner.
2. Select your preferred export format from the dropdown menu (e.g., CSV or Excel).

Automate Your Scheduling Workflow by using Zapier [New]

Automating your workflow with Zaps can save you time and reduce repetitive tasks. By connecting OnceHub to Zapier, you can transfer Booking Calendar data to your preferred applications effortlessly. Depending on how you collect and manage guest information, you can set up Zaps using either **Meeting Fields** or **Contact Fields**. Here's how to get started:

What Are Zaps?

Zaps are automation workflows that link different apps through Zapier. For OnceHub users, Zaps allow the automatic transfer of guest information to your tools of choice, ensuring efficient data management.

Automating with Meeting Fields

Meeting Fields are specific to a meeting that was booked during the scheduling process, like meeting details or preferences. If you're looking to automate data from these fields, please see our guide on **Setting up a Zap for Booking Calendars Using Meeting Fields**.

Automating with Contact Fields

Contact Fields contain guest-specific information, such as names and email addresses, rather than details tied to a single meeting. To automate processes using Contact Fields, please see our guide on **Setting up a Zap for Booking Calendars Using Contact Fields**.

Setting up a Zap for Booking Calendars Using Contact Fields [New]

In this guide, you will learn how to automate guest information transfer from Booking Calendar Contact fields to your preferred applications via a Zap.

For information on how to capture guest data in Contact Fields, please take a look at our **Mapping Booking Calendar Questions to Global Fields article**.

Setting up the Zap

After mapping your data in OnceHub, follow these steps to create a Zap that retrieves the correct contact when a guest interacts with you.

Step 1: Opening the Zapier pop-up

1. **Navigating to Zapier Settings:**
   - Click the gear icon located in the top-right corner of the page.
   - Select **Zapier** from the dropdown menu.
2. **Initiating Zap Creation:**
   - Go to the **Add Zaps** section.
   - Search for the application with which you want to create a Zap.

Step 2: Choosing a Template

1. A list of Zapier templates will appear below. Select the one that best fits your needs.
2. Click **Add Zap** to use your chosen template.

Step 3: Configuring the Trigger Step

1. Confirm the **Trigger event** and OnceHub account that should be used.
   - For example, you can use the **Booking Lifecycle Event** trigger to have the Zap trigger whenever a change to a booking is made.
2. Complete the test step to ensure the trigger functions correctly.

Step 4: Adding a New Zap Step

1. In the flowchart, click on the **+** (Add step) button to introduce a new step.
2. Choose **OnceHub** from the list of applications.

Step 5: Adding the Find Contact Action

1. Select **Find Contact** from the Action event dropdown.
2. Click **Continue** to proceed to the Configure step.
3. Select **Contact email** from the **Find Contact by** dropdown.
4. Click the **+** and select **Contact - Email** for the **Value** field.
5. Complete the test step to verify the action.

Step 6: Mapping Data to Your Application

1. In the Action for the destination application, proceed to its **Configure** step.
2. Add values to required fields by clicking the **+**.
   - Select **Find Contact in OnceHub**, to map data from the corresponding OnceHub contact fields.
   - Or **Booking Scheduled in OnceHub**, to map booking related data such as Meeting time.
3. Click **Continue** once you are done mapping data to your application.
4. Complete the test step to ensure the data is successfully sent to your application.

Step 5: Publishing the Zap

Once you are happy with your configuration, click on **Publish** to turn on the Zap.

Setting Up a Zap for Booking Calendars Using Meeting Fields [New]

In this guide, you will learn how to automate guest information transfer from Booking Calendar Meeting fields to your preferred applications via a Zap.

For information on how to capture guest data in Meeting Fields, please take a look at our **Mapping Booking Calendar Questions to Custom Fields article**.

Setting up the Zap

After mapping your data in OnceHub, follow these steps to create a Zap that retrieves the correct contact when a guest interacts with you.

Step 1: Opening the Zapier pop-up

1. **Navigating to Zapier Settings:**
    - Click the gear icon located in the top-right corner of the page.
    - Select **Zapier** from the dropdown menu.
2. **Initiating Zap Creation:**
    - Go to the **Add Zaps** section.
    - Search for the application with which you want to create a Zap.

Step 2: Choosing a Template

1. A list of Zapier templates will appear below. Select the one that best fits your needs.
2. Click **Add Zap** to use your chosen template.

Step 3: Configuring the Trigger Step

1. Confirm the **Trigger event** and OnceHub account that should be used.
    - For example, you can use the **Booking Lifecycle Event** trigger to have the Zap trigger whenever a change to a booking is made.
2. Complete the test step to ensure the trigger functions correctly.

Step 4: Mapping Data to Your Application

1. In the Action for the destination application, proceed to its **Configure** step.
2. Add values to required fields by clicking the **+** to insert data.
    - Meeting fields that you created will be labeled as **Custom Fields** and at the bottom of the list in the pop-up.
3. Click **Continue** once you are done mapping data to your application.

4. Complete the test step to ensure the data is successfully sent to your application.

Step 5: Publishing the Zap

Once you are happy with your configuration, click on **Publish** to turn on the Zap.

Getting started with Booking pages [Classic]

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**.

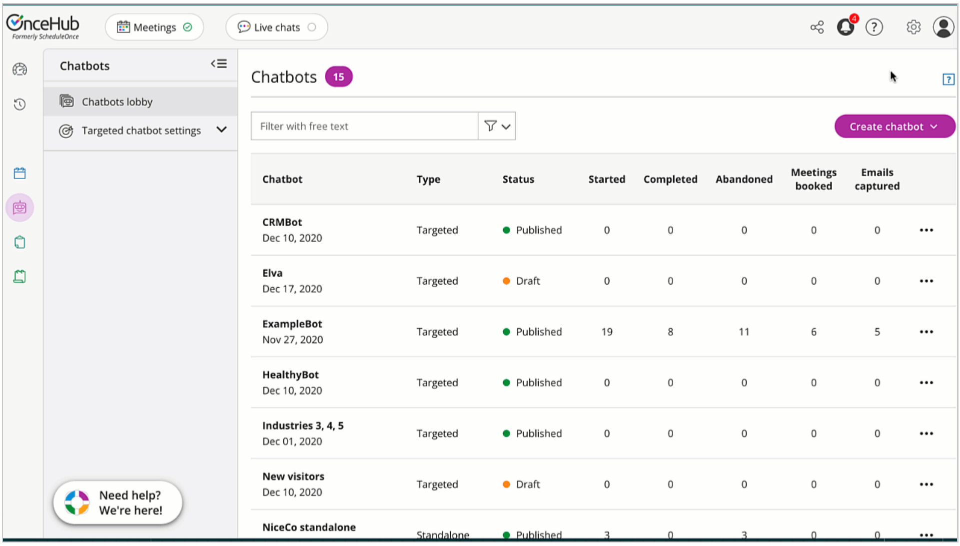


Figure 1: Update your availability

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**.

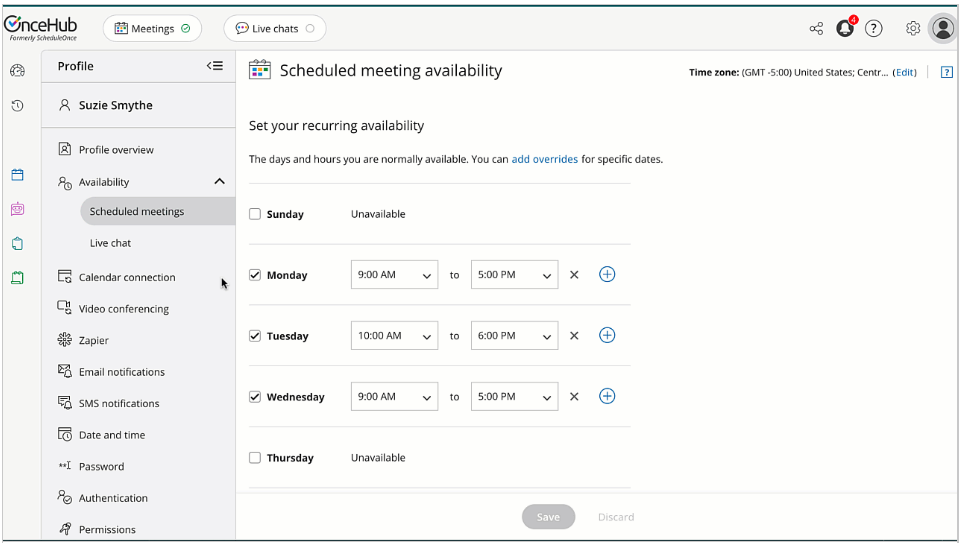


Figure 2: Connect your calendar

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.

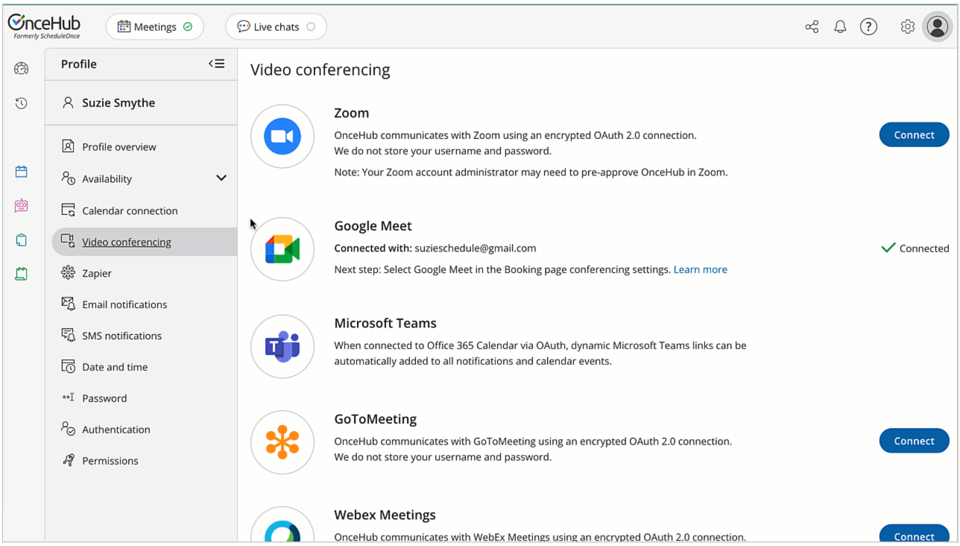


Figure 3: Associated calendars retrieving busy time

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.

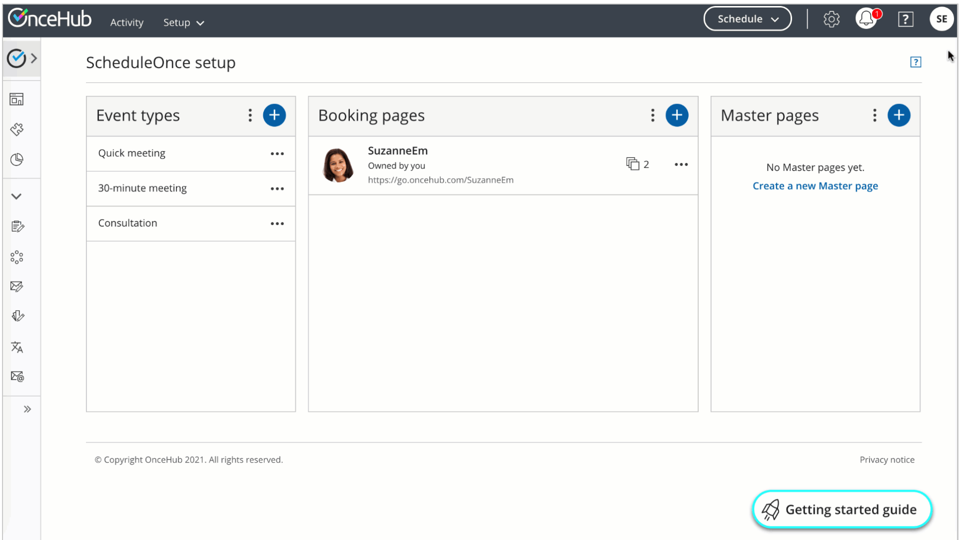


Figure 4: Connect to video conferencing

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

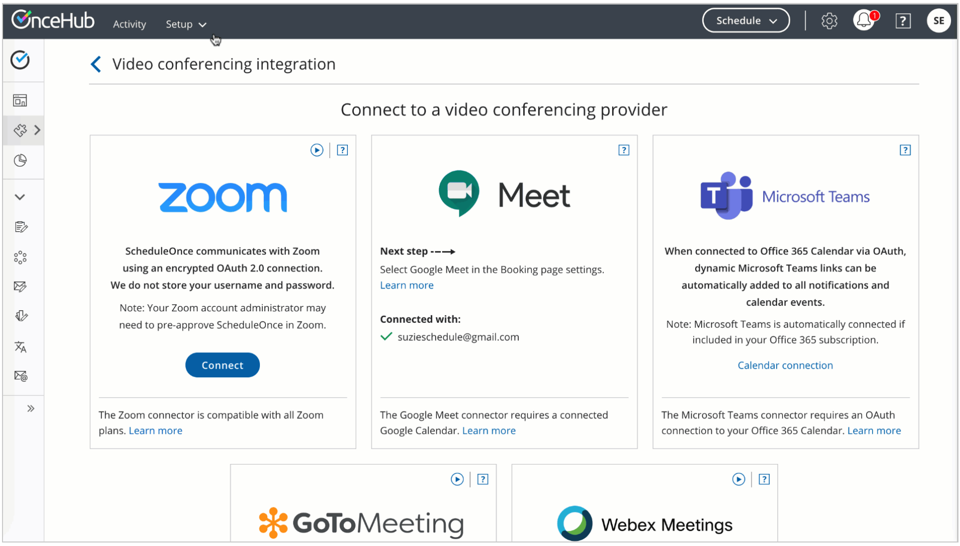


Figure 5: Add video conferencing to your Booking page location

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**.

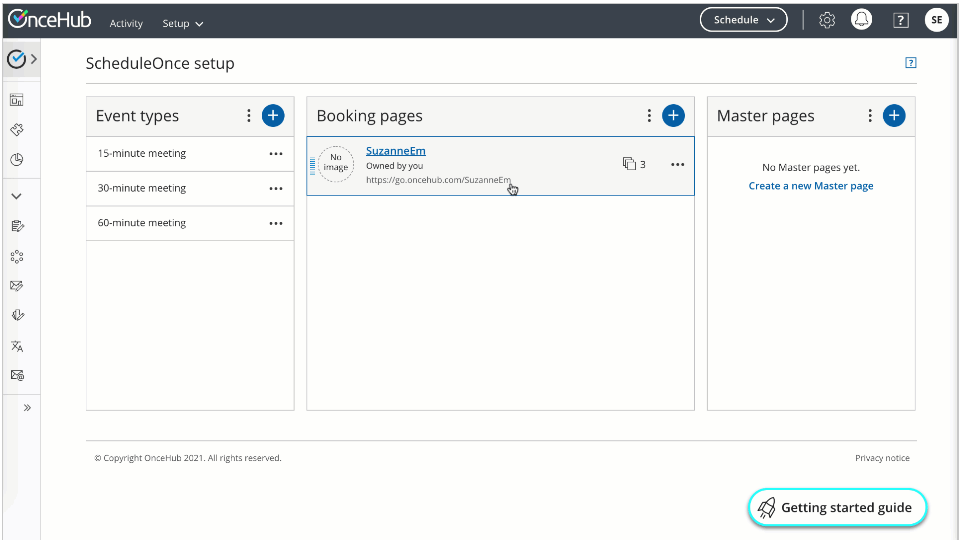


Figure 6: Adjust your Event types

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**.

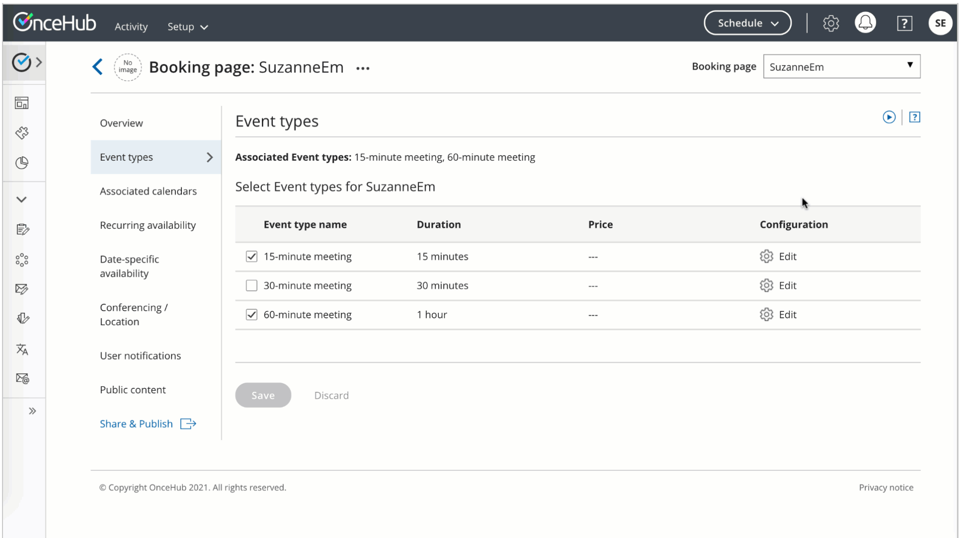


Figure 7: Update your Event type settings

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**.

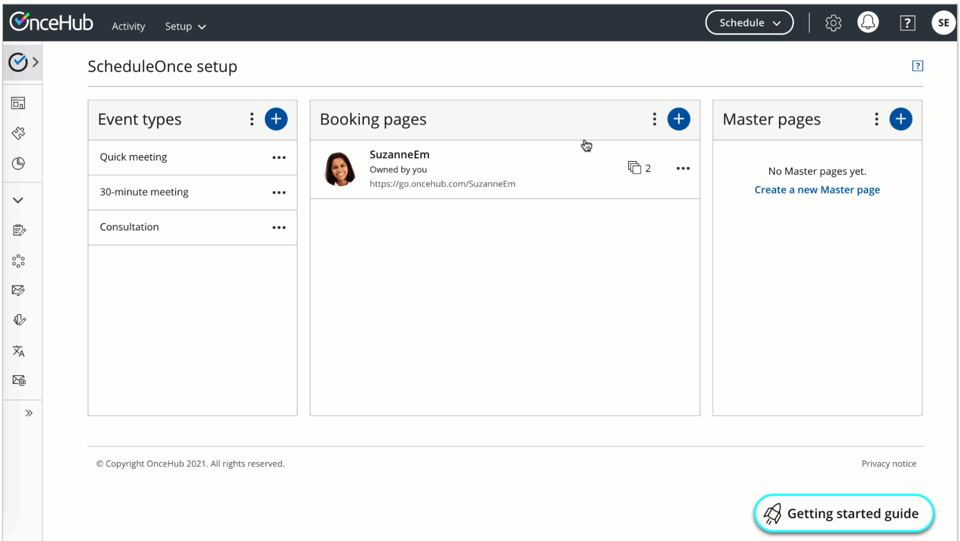


Figure 8: Add customer-facing details

Step 3. Share your link

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

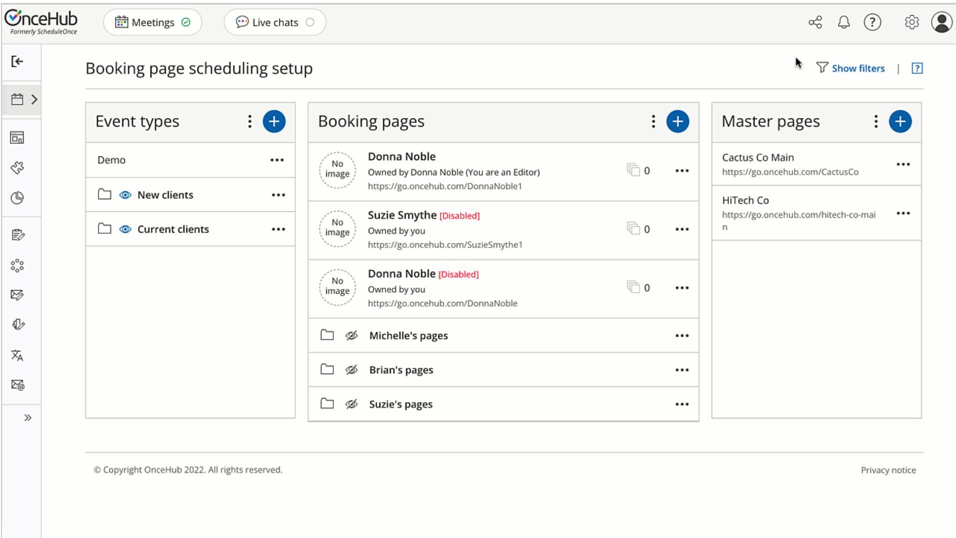


Figure 9: Share your link

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

Working With vs. Without a Connected Calendar [Classic]

When using OnceHub, you have the option to operate with or without connecting your personal calendar. While it's possible to accept bookings without a connected calendar, integrating your calendar is strongly recommended to improve the efficiency and accuracy of your scheduling process.

Recommendation

Using OnceHub without connecting a calendar may be suitable for simple use cases or one-off scenarios where you don't need to integrate with a personal schedule. However, for a more automated and convenient booking experience, we strongly recommend adding a connected calendar. This ensures accurate, real-time availability management and reduces the risk of scheduling conflicts.

To make an informed decision, it's important to understand how working with a connected calendar compares to working without one. Here's what happens in both scenarios.

Working With a Connected Calendar

When you connect a personal calendar to OnceHub, you enjoy several benefits that make managing your bookings more efficient:

Automated User Calendar Events

OnceHub automatically adds new bookings as events to your connected calendar. This saves you time and ensures your calendar always reflects your updated schedule.

Automated Guest Calendar Events

Oncehub automatically adds the guest to the user's calendar event. This helps keep the guest up to date and reduces the risk of no-shows.

Shared Busy Time Across Booking Pages

Busy time from your calendar blocks availability across your Booking Pages, preventing double bookings or scheduling conflicts.

Advanced Integration Features

With a connected calendar, you can reschedule OnceHub bookings directly by adjusting the relevant event in your calendar. The changes are automatically updated in OnceHub.

Note: This feature is not supported for iCloud calendars.

Working Without a Connected Calendar

You can still use OnceHub without connecting a personal calendar, but there are some important limitations to consider:

Independent Busy Times on Booking Pages

Each Booking Page operates in isolation, meaning bookings made on one page will not block availability on others.

If you manage multiple Booking Pages, you must manually monitor and avoid overlapping bookings.

Manual Calendar Updates

OnceHub provides ICS file links in scheduled meeting emails. These files allow you to create calendar events manually for each booking. While functional, this requires extra effort to keep your schedule synchronized.

Using Booking pages with your video conferencing app [Classic]

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).

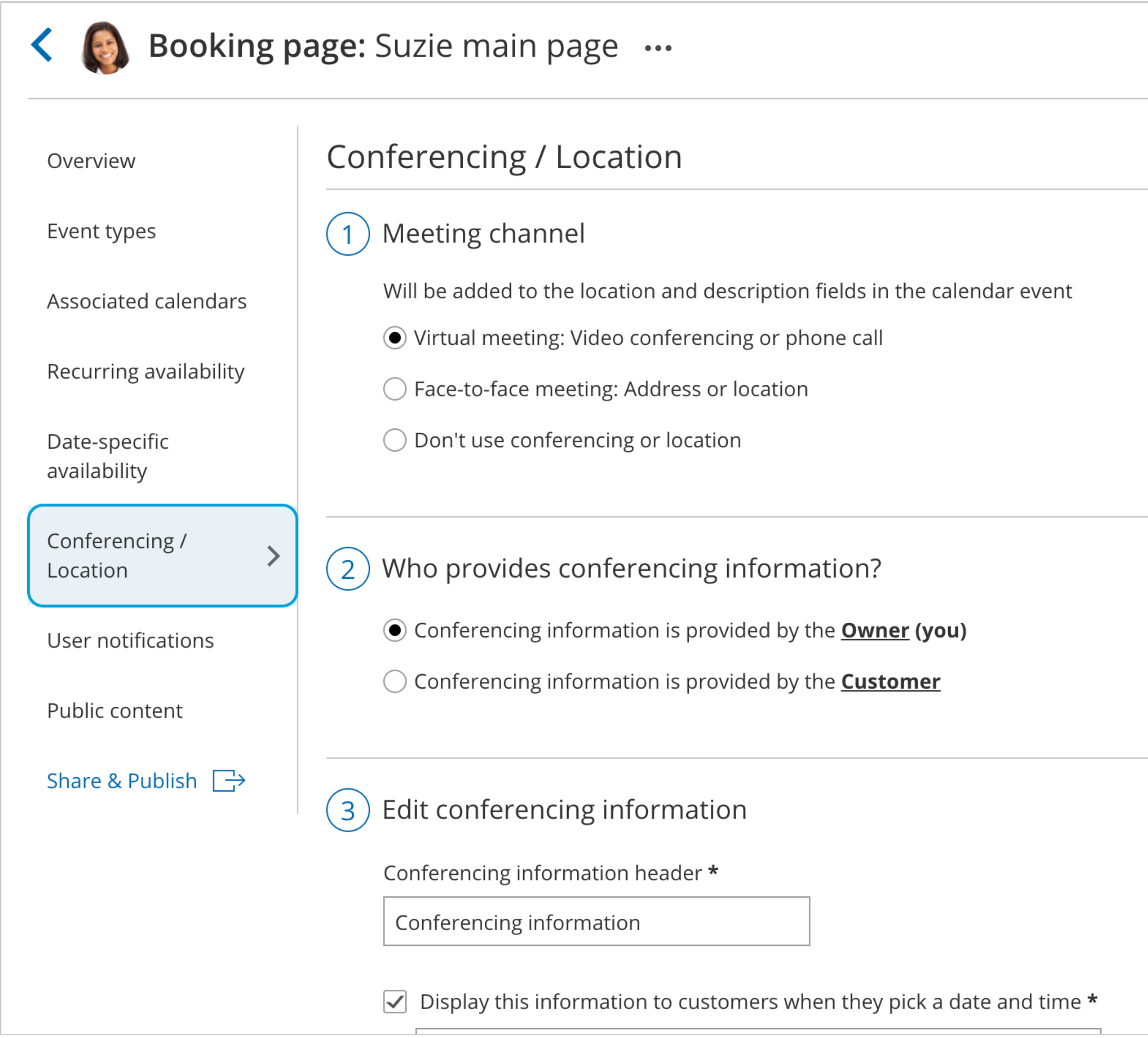


Figure 1: Conferencing / Location section

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).

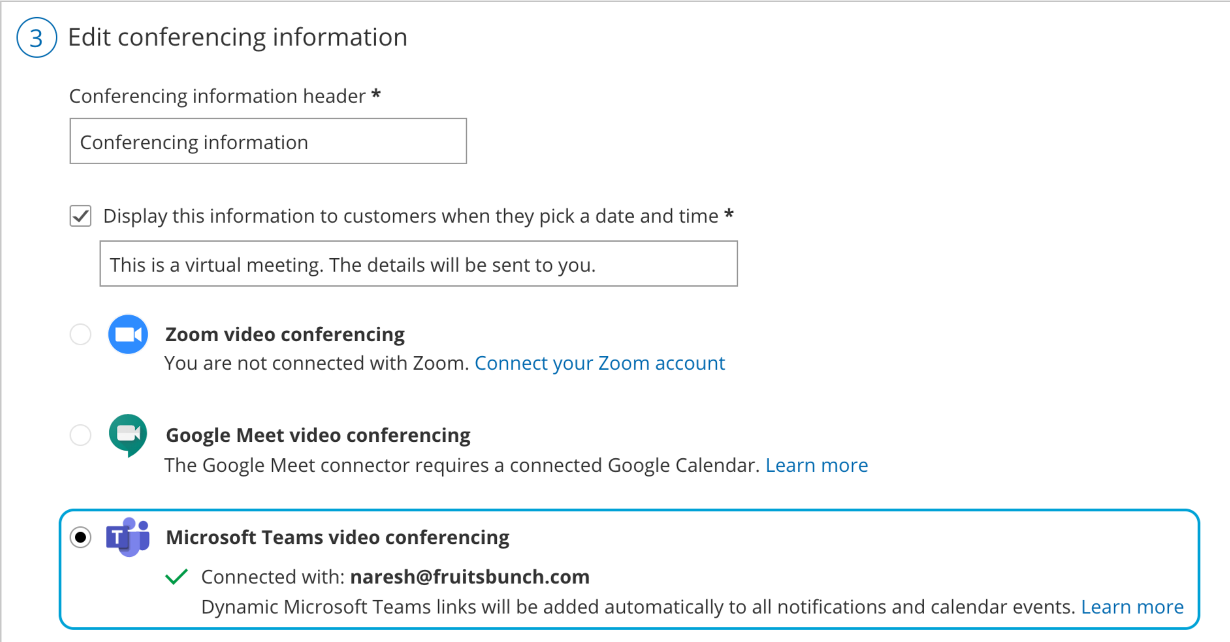


Figure 2: Available video conferencing apps with Microsoft Teams video conferencing selected.

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

Using Profile-level Availability with Booking Pages [Classic]

To simplify scheduling across multiple Booking Pages with various meeting locations (e.g., Zoom, in-person), you can define your availability at the profile level. This ensures all Booking Pages share the same settings, eliminating the need for individual configurations.

Types of Availability Settings

Profile availability is set using two methods:

- **Weekly Working Hours:** Define your standard, default recurring availability for each week.
- **Date-Specific Override:** Adjust your availability for particular dates by adding or removing time slots.

How to Use Profile-Level Availability for Booking Pages:

To use profile availability for Booking Pages, you will need to:

1. Set up your availability directly within your profile settings.
2. Configure each Booking Page to use your profile's availability instead of using their own.

Step 1: Set up your availability directly within your profile settings.

Accessing Your Profile Settings

1. Click on the profile icon located in the top-right corner.
2. Select **Scheduled Meeting Availability** from the dropdown.

Setting Your Weekly Working Hours

1. Define your default, recurring availability for each week on the left.

Adding Date-Specific Overrides (optional)

1. Modify your availability for specific dates by adding or removing time slots on the right.

Saving Your Settings

1. Click **Save** to apply your changes.

Step 2: Configuring Booking Pages to use your profile's availability instead of using their own.

After defining your profile-level availability, you can enable Booking Pages to adopt these settings automatically.

Accessing Booking Page Configuration

1. Open the **Booking Page** scheduling setup from the left-hand menu.

2. Select the specific Booking Page you want to configure.

Using Weekly Working Hours

1. Click on **Recurring availability** in the left-hand menu.
2. Select **Use recurring availability from [Your Name] profile**.

Using Date-Specific Overrides (optional)

1. Click on **Date-specific availability** from the left-hand menu.
2. Select **Use date-specific overrides from [Your Name] profile**.

If you would prefer to set availability for each Booking Page individually, please see our **Booking pages: Recurring availability article**.

Zoom: Dynamic or static passcodes [Classic]

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.

Introduction to Booking pages [Classic]

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 [Classic]

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).

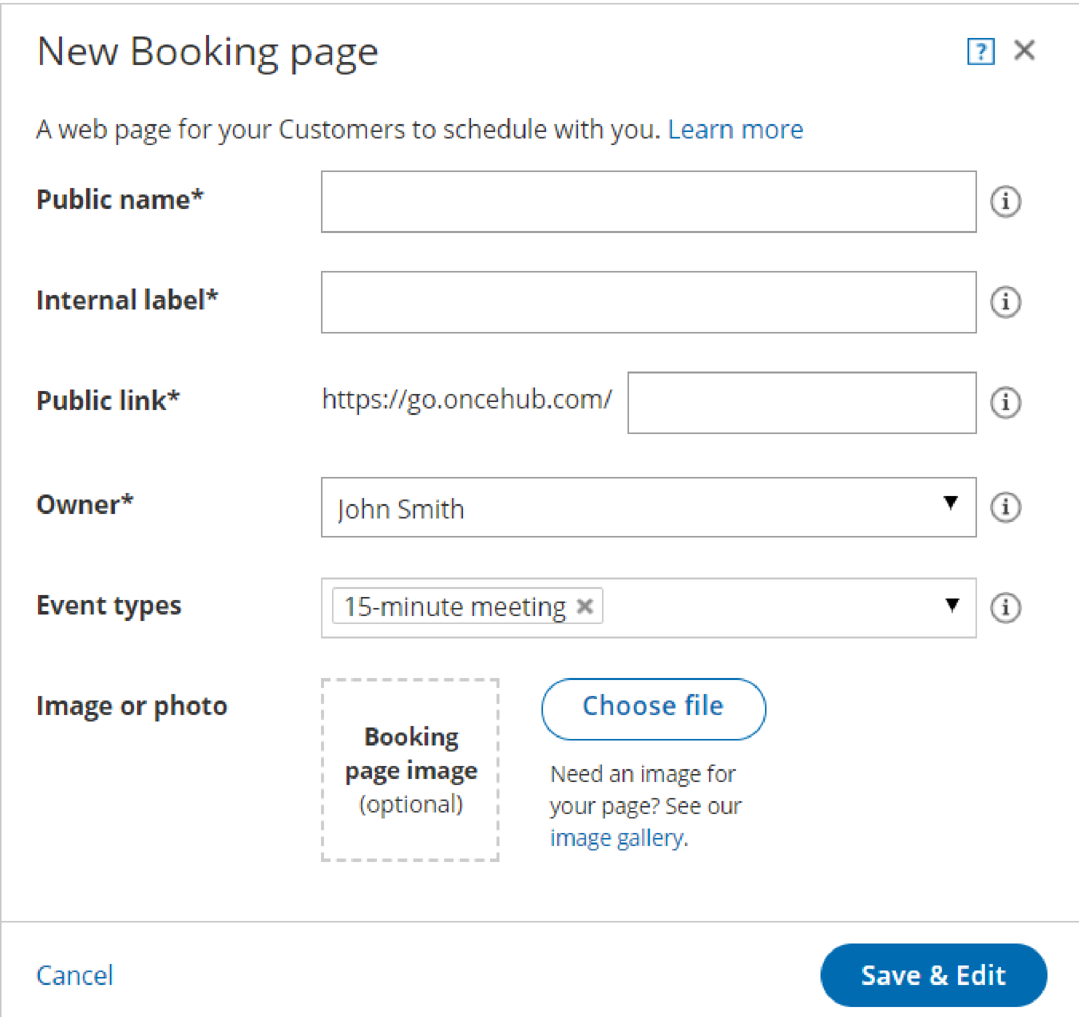


Figure 1: New Booking page pop-up

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 [Classic]

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**.

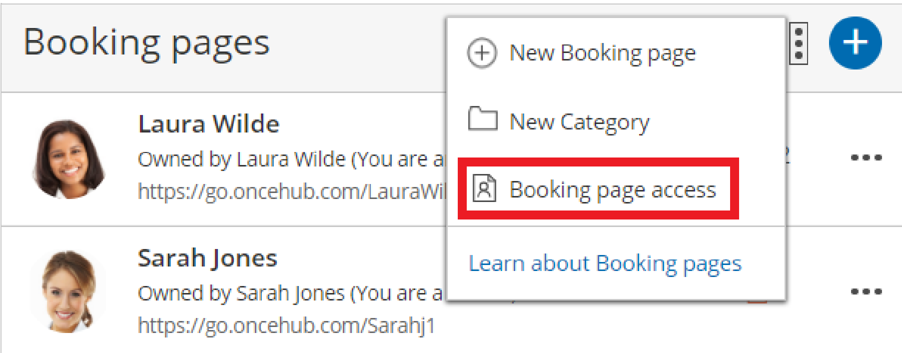


Figure 1: Booking page action menu

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.

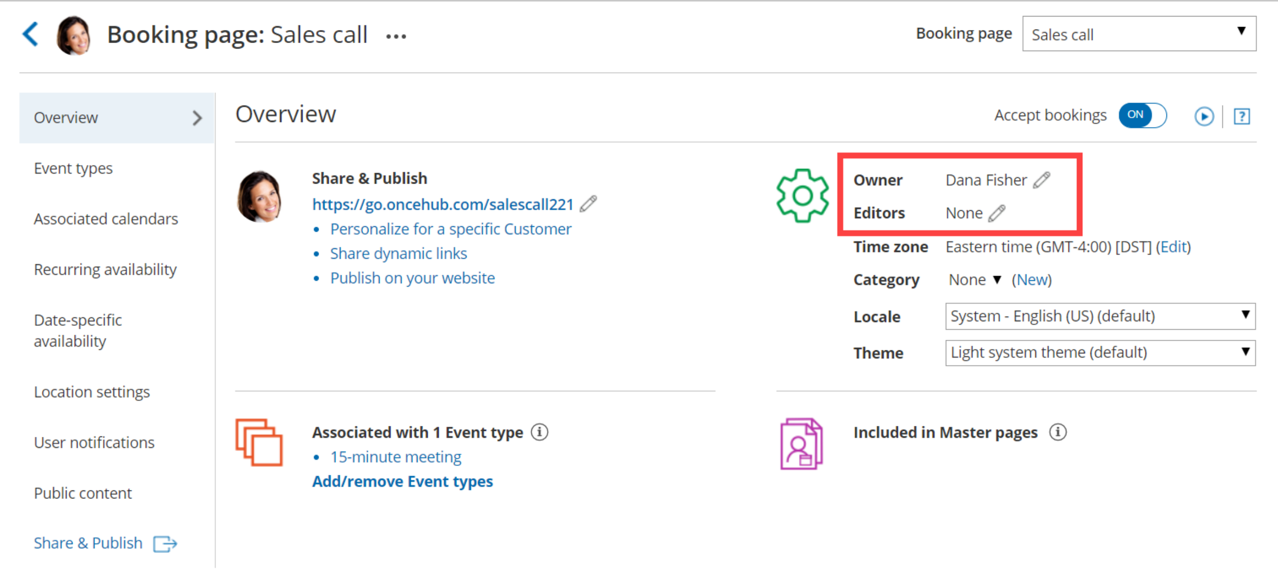


Figure 3: Edit the Owner and Editors in the Booking page Overview section

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.

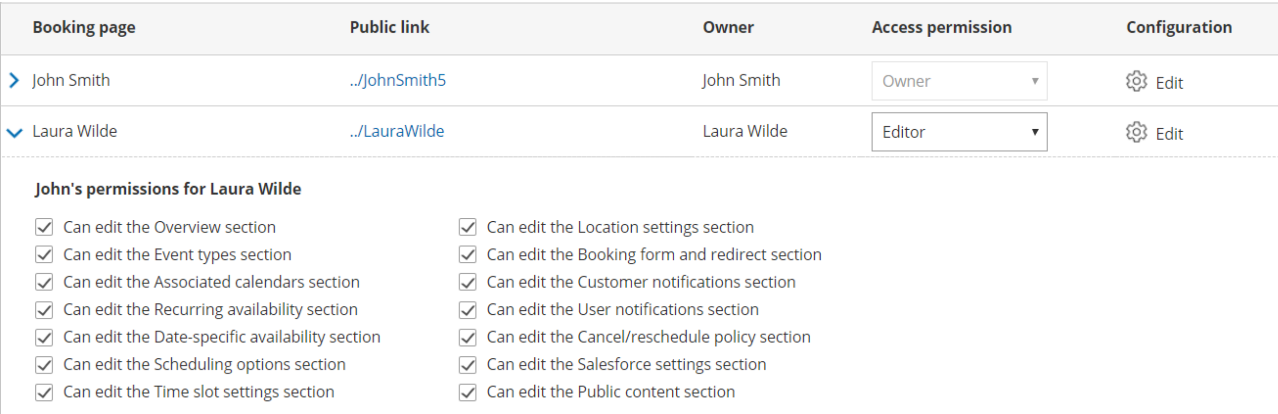


Figure 4: Granular permissions

Adding Event types to Booking pages [Classic]

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).

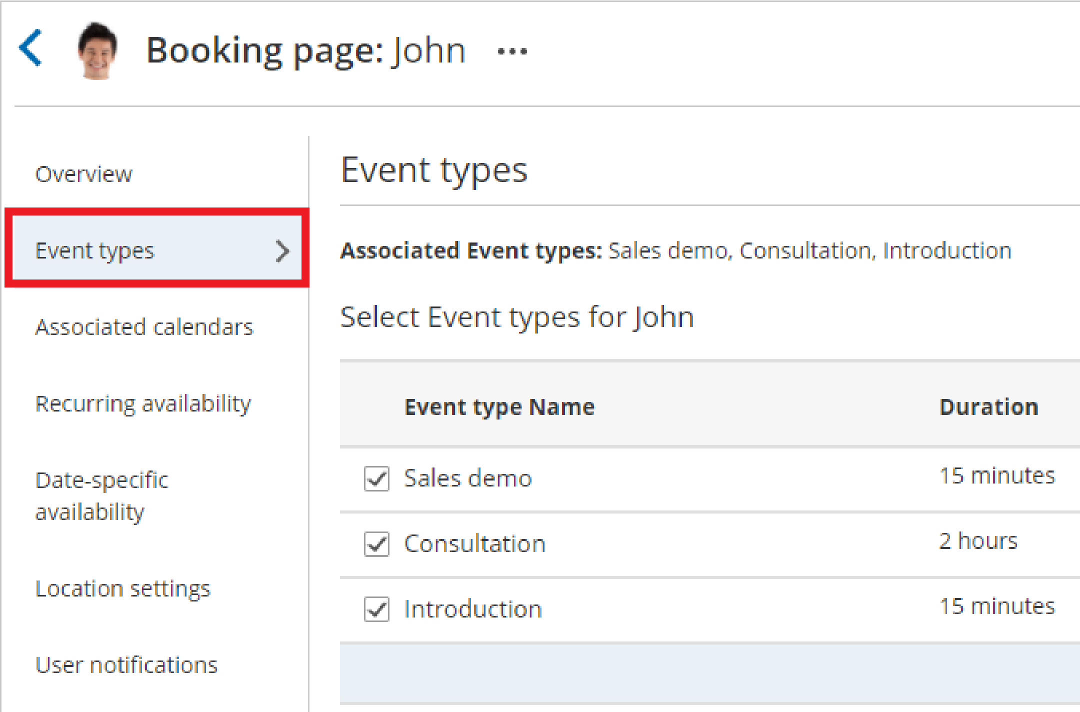


Figure 1: Event type section

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

Booking pages Overview [Classic]

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.

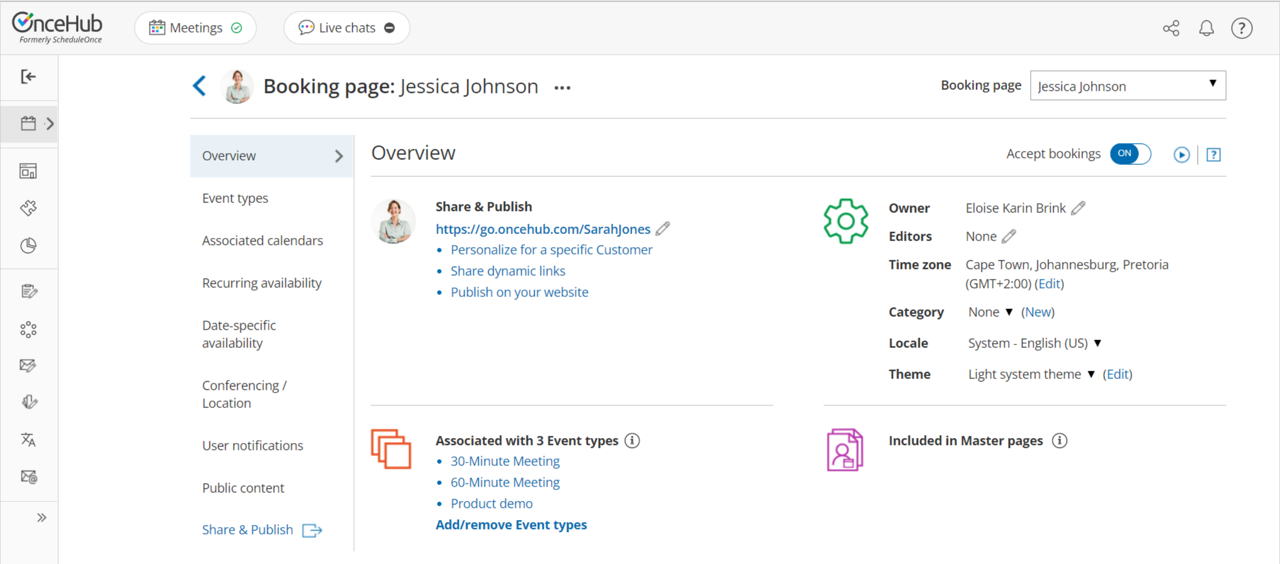


Figure 1: Booking page Overview section

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

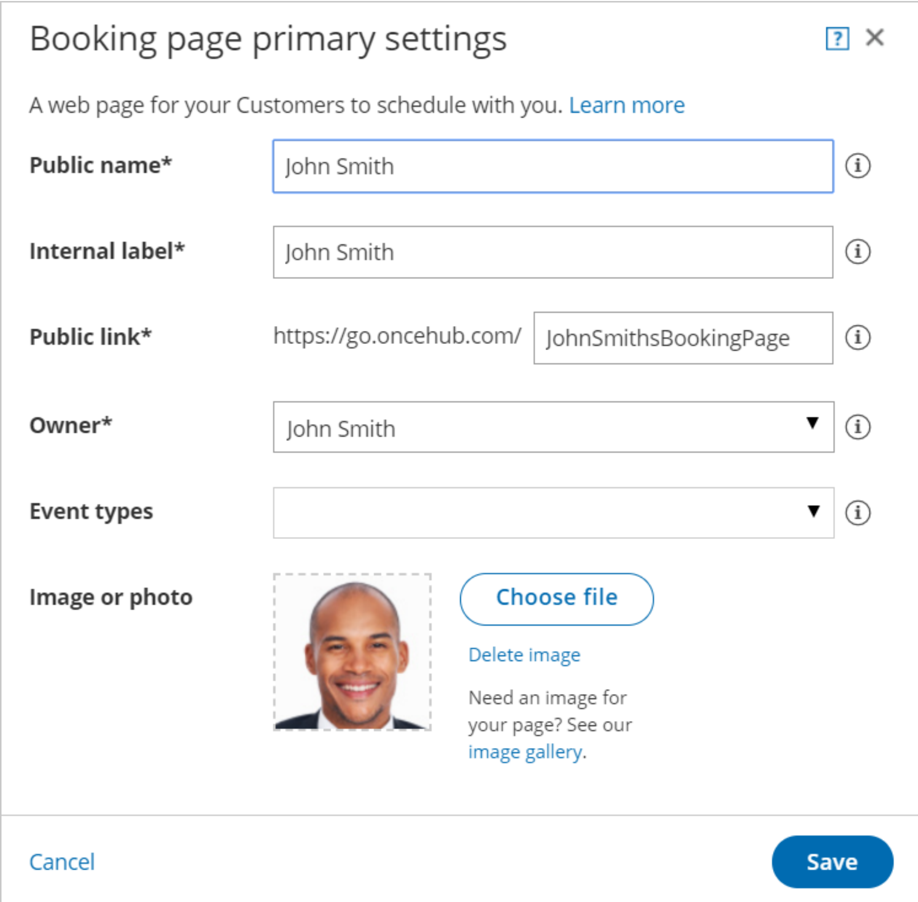


Figure 2: Booking page primary settings

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

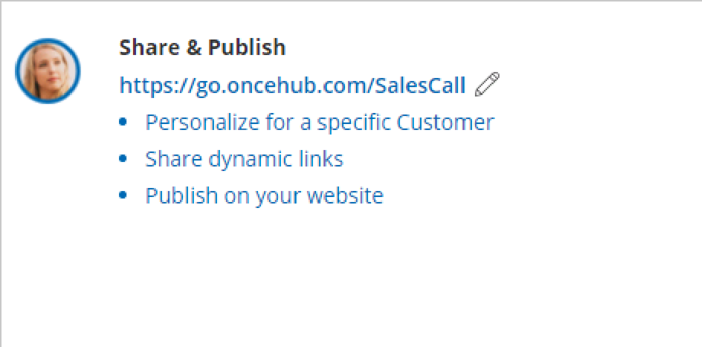


Figure 2: Share & Publish section

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

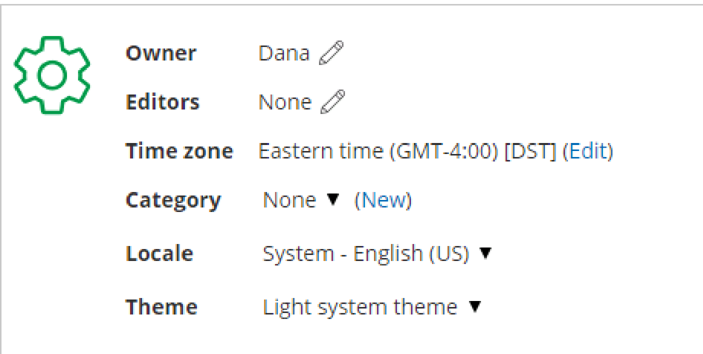


Figure 3: Main settings section

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

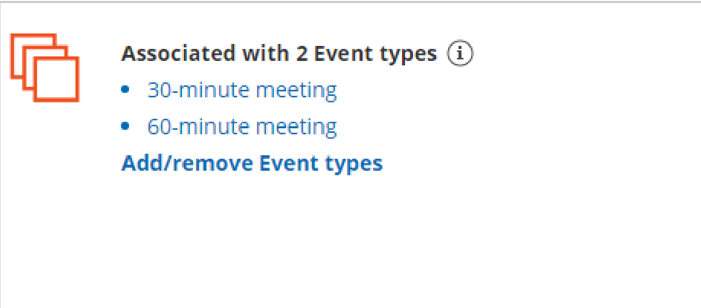


Figure 4: Associated Event types

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

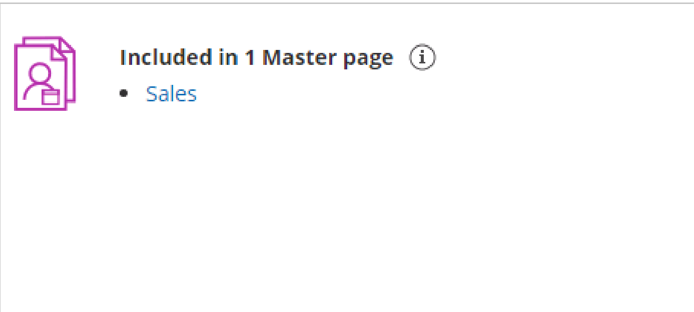


Figure 5: Included in Master pages

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 pages: Associated calendars [Classic]

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.

Location of the Associated calendars section

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

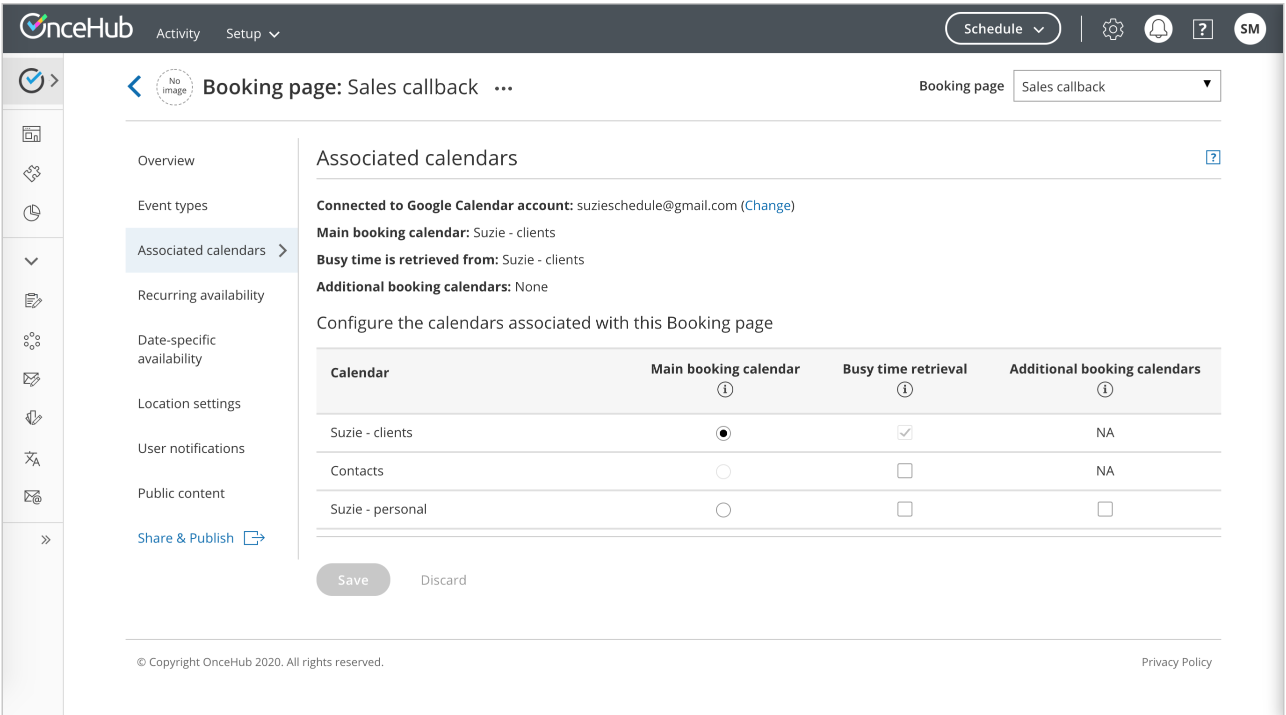


Figure 1: Booking page: Associated calendars section

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.

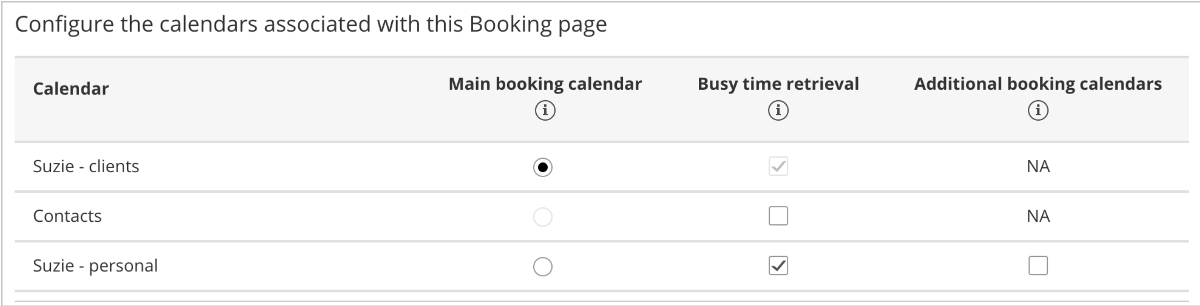


Figure 2: Choosing your associated calendars

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.
- **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 pages: Recurring availability [Classic]

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.

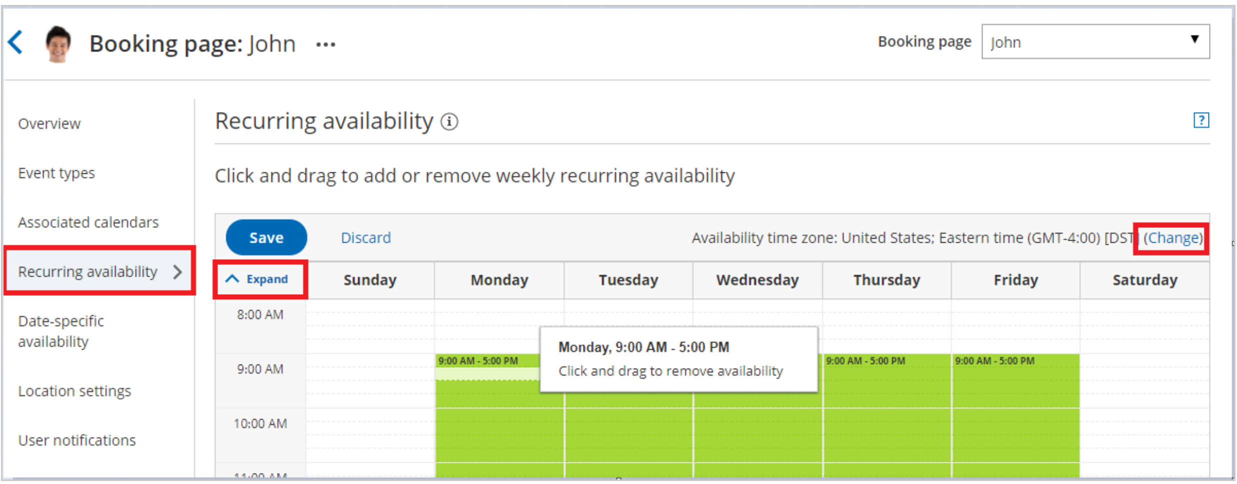


Figure 1: Recurring availability section

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.

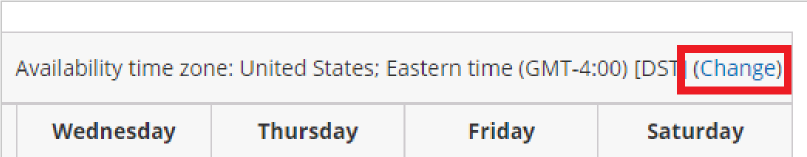


Figure 2: Change time zone

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

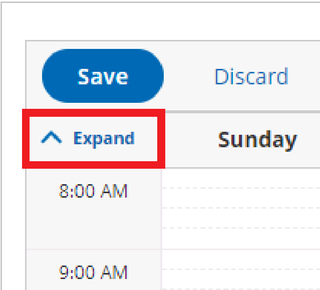


Figure 3: Expand hours

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.

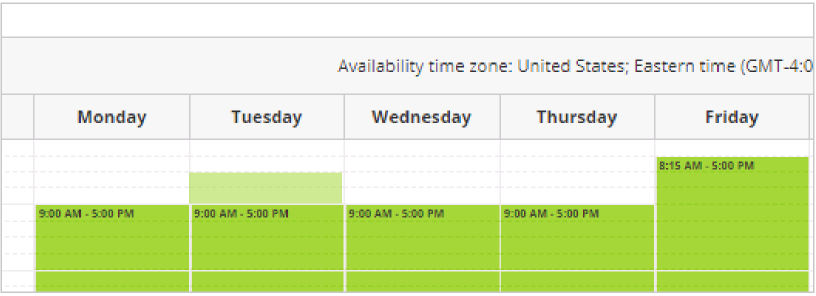


Figure 4: Adding availability

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.

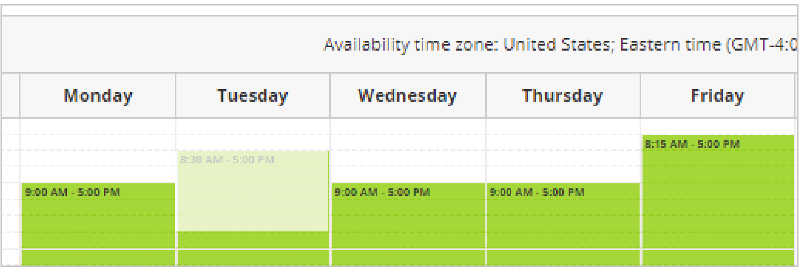


Figure 5: Removing availability

8. Click **Save**.

Booking pages: Date-specific availability [Classic]

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.

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.

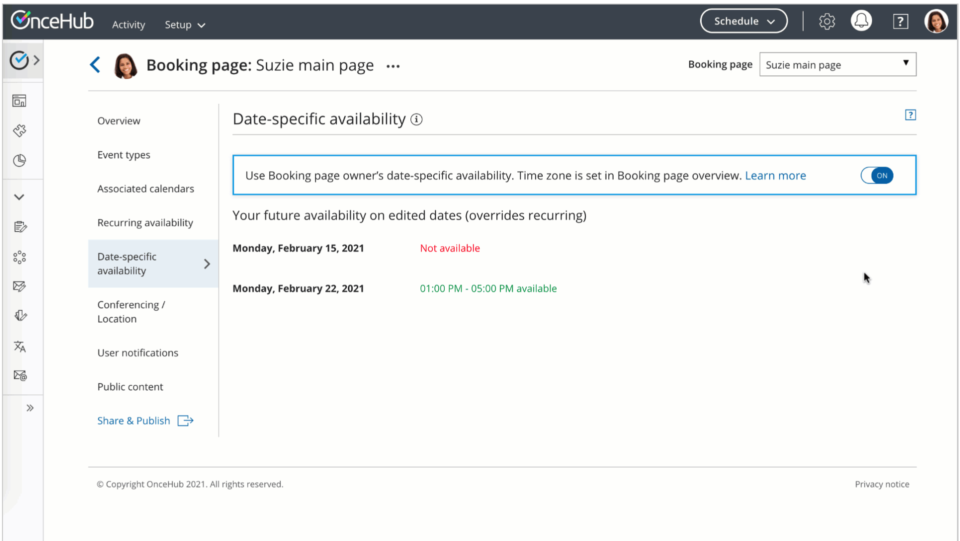


Figure 1: Toggle off User availability

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.

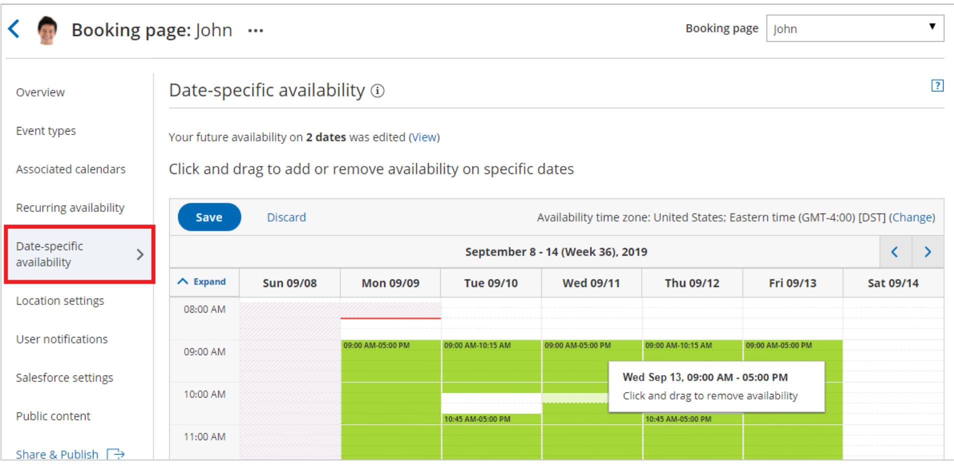


Figure 2: Date-specific availability section

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.

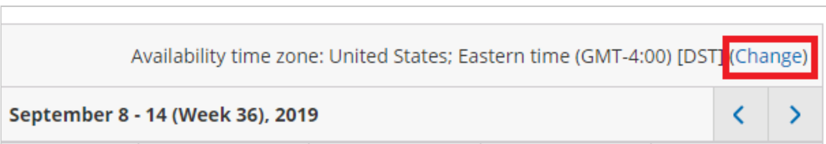


Figure 3: Change time zone

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

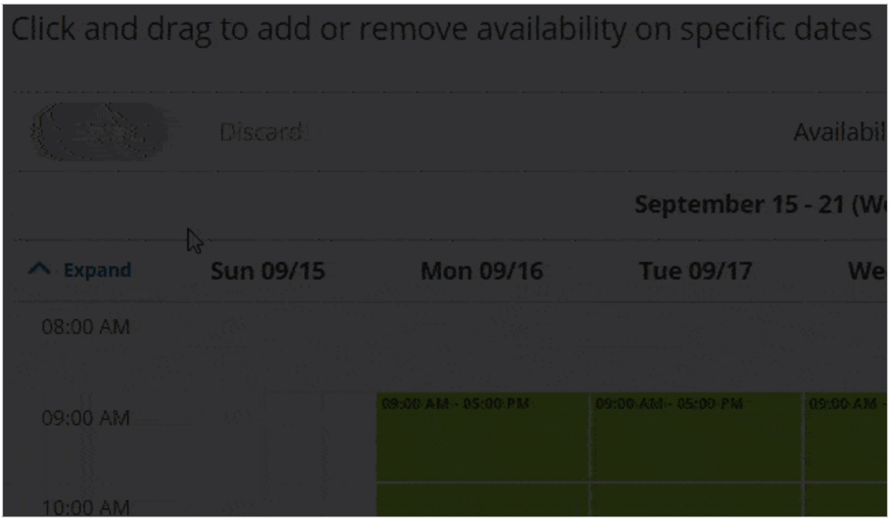


Figure 4: Expand hours

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

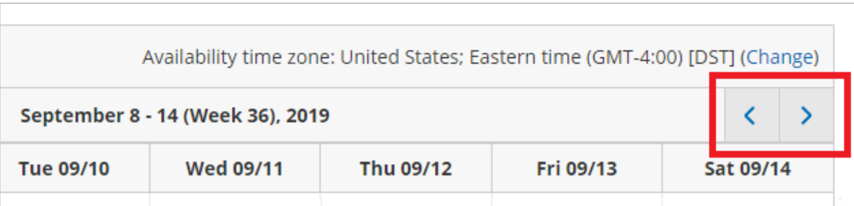


Figure 5: Select week

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.

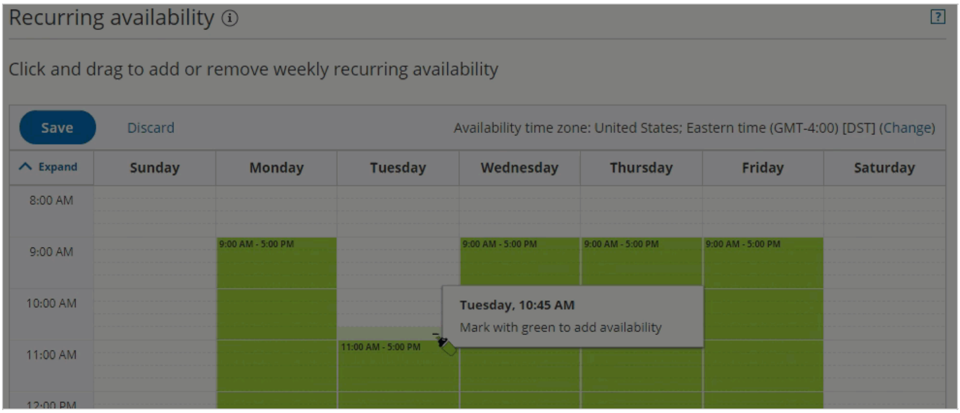


Figure 6: Adding availability

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.

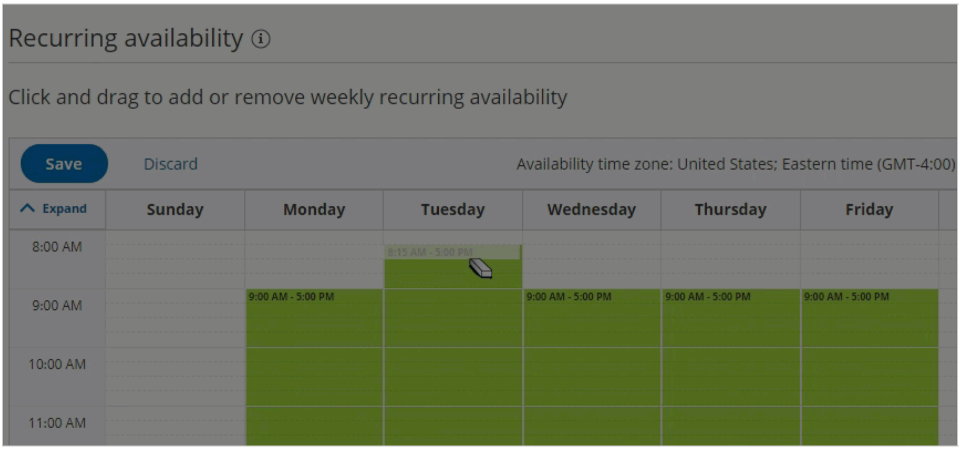


Figure 7: Removing availability

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

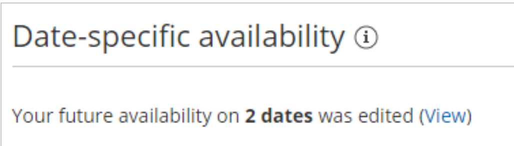


Figure 8: View link

10. Click **Save**.

Booking pages: Location settings [Classic]

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).

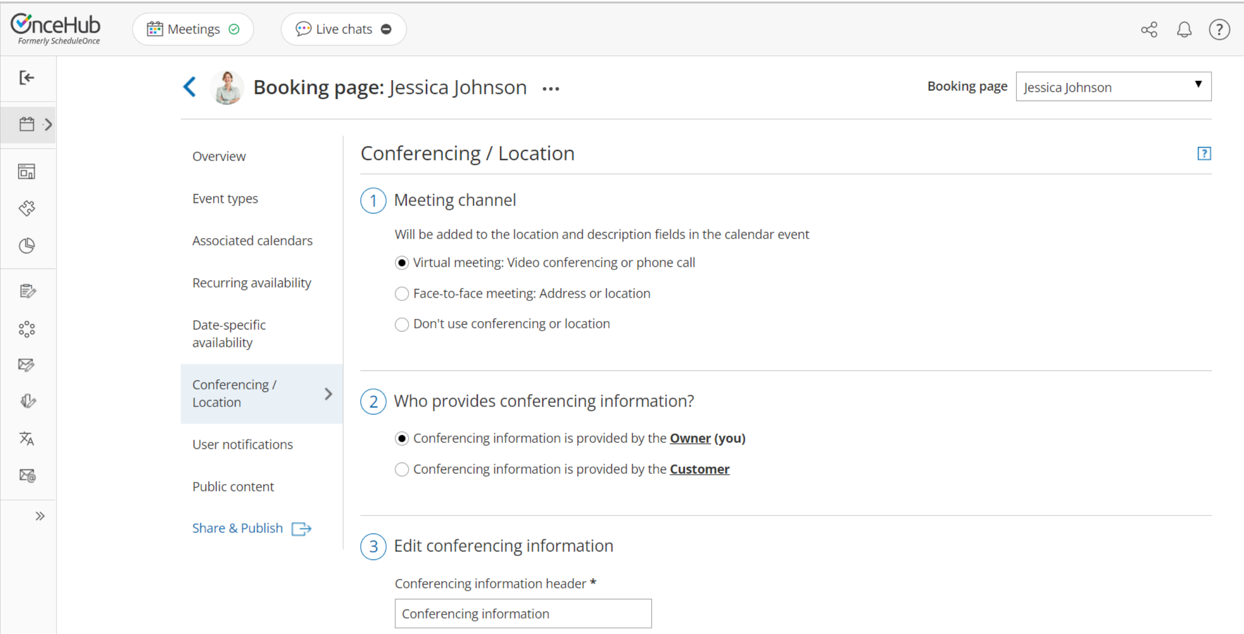


Figure 1: Conferencing / Location section

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).

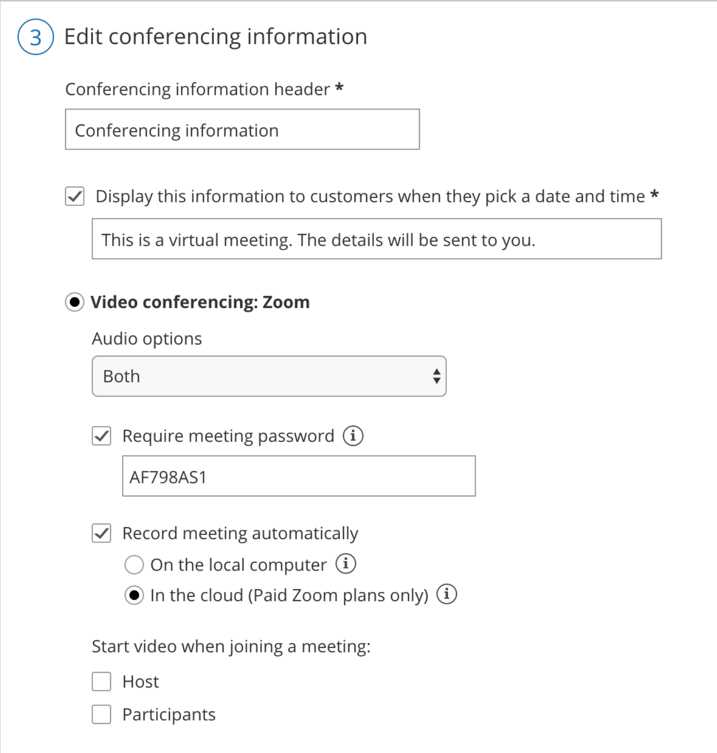


Figure 2: Edit conferencing information

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.

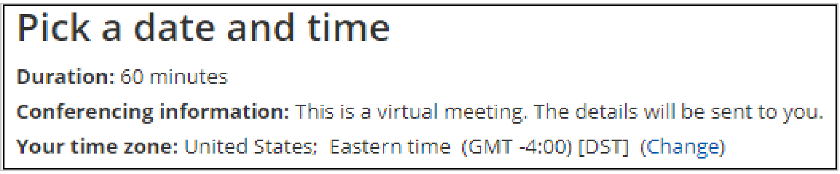


Figure 3: Conferencing information when a virtual location provided by you

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.

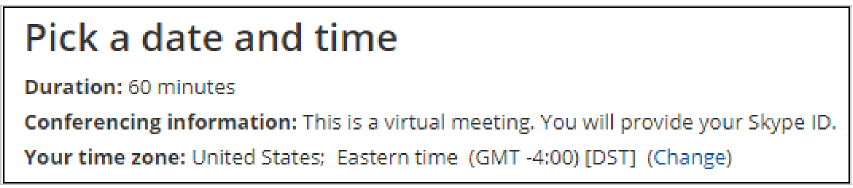


Figure 4: Conferencing information when virtual location provided by the Customer

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.

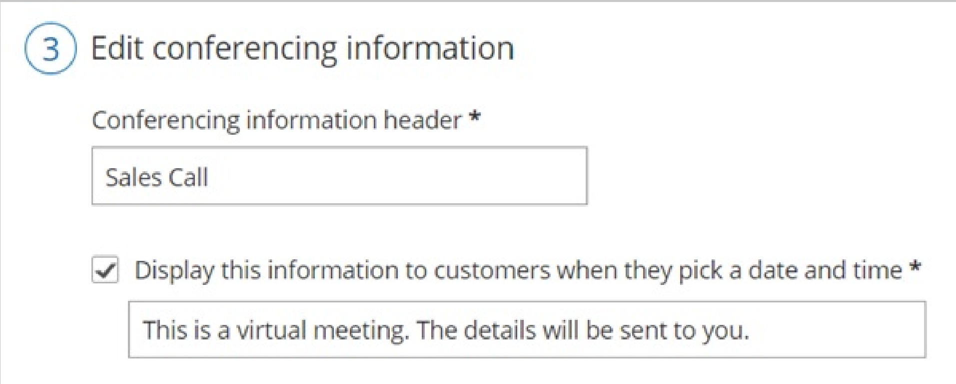


Figure 5: Date and time information

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

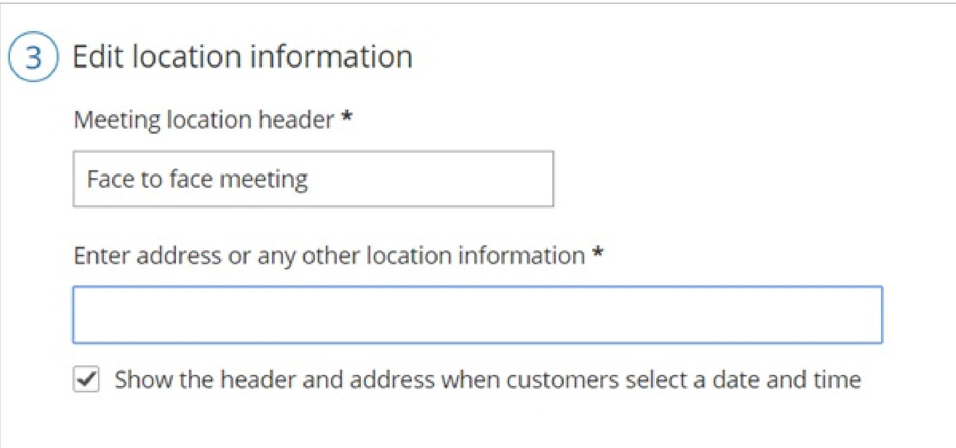
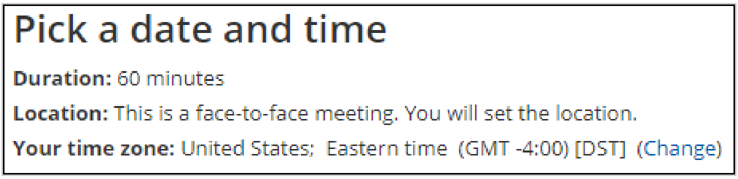


Figure 7: Entering the physical meeting information

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

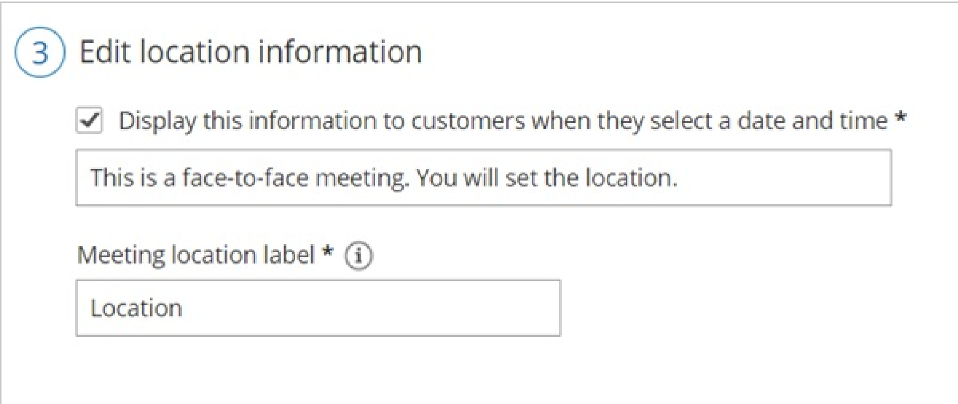


Figure 9: Location information when the Customer provides the location

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 pages: Public content [Classic]

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).

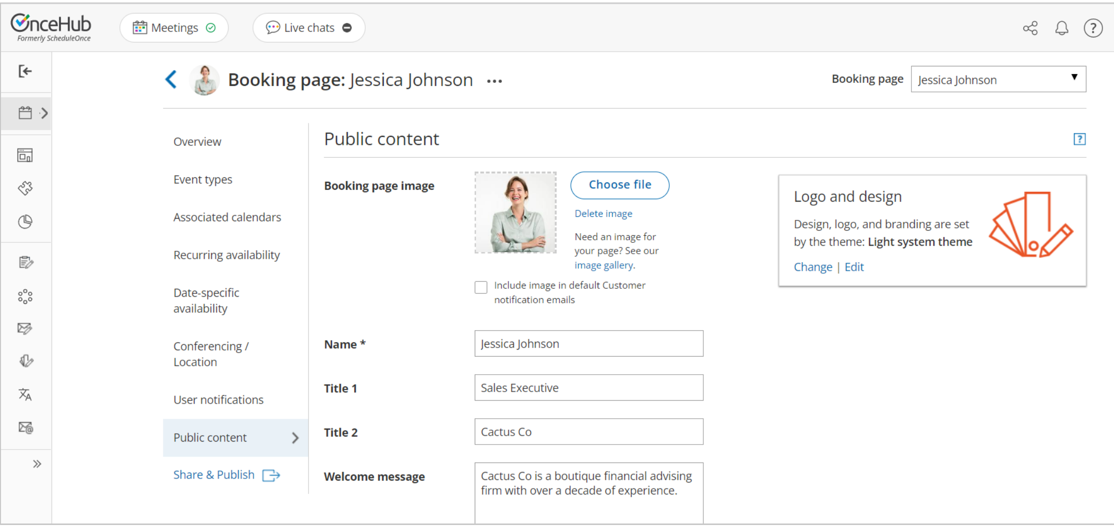


Figure 1: Public content section

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).

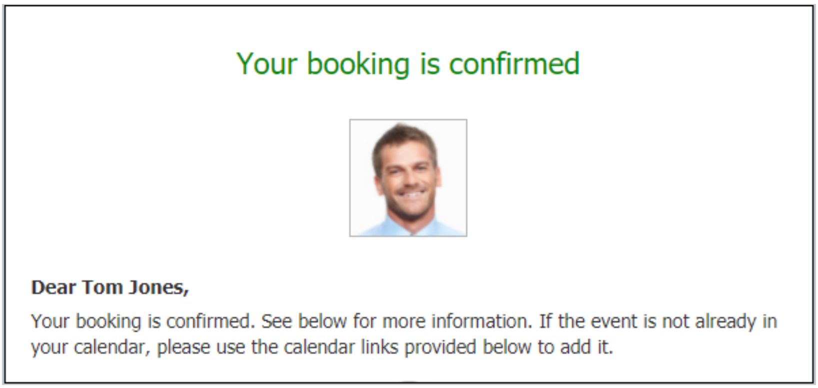


Figure 2: Customer notification email

> **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:

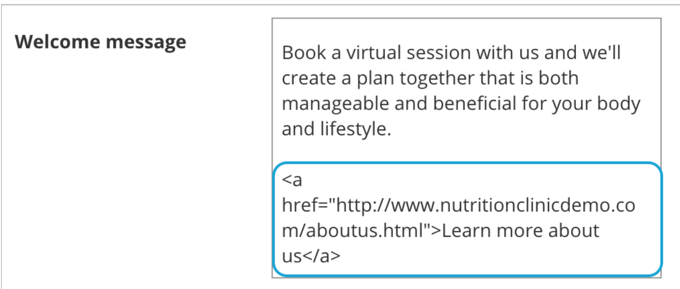


Figure 3: HTML link in the Event type description

> **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:

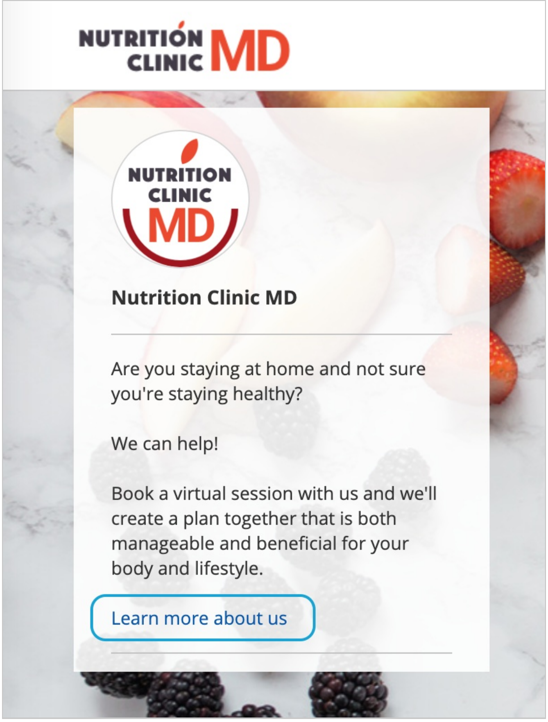


Figure 4: Event type description including HTML link

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/

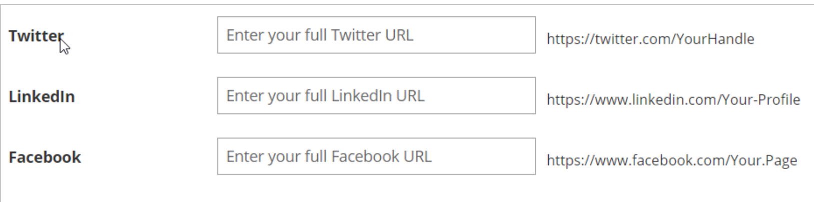


Figure 5: Social media options

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.

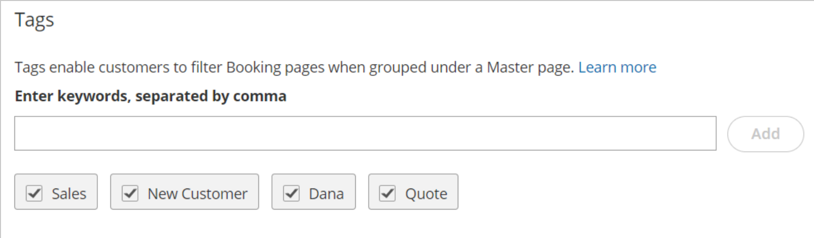


Figure 6: Using tags

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.

Booking pages: Time zone settings [Classic]

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.

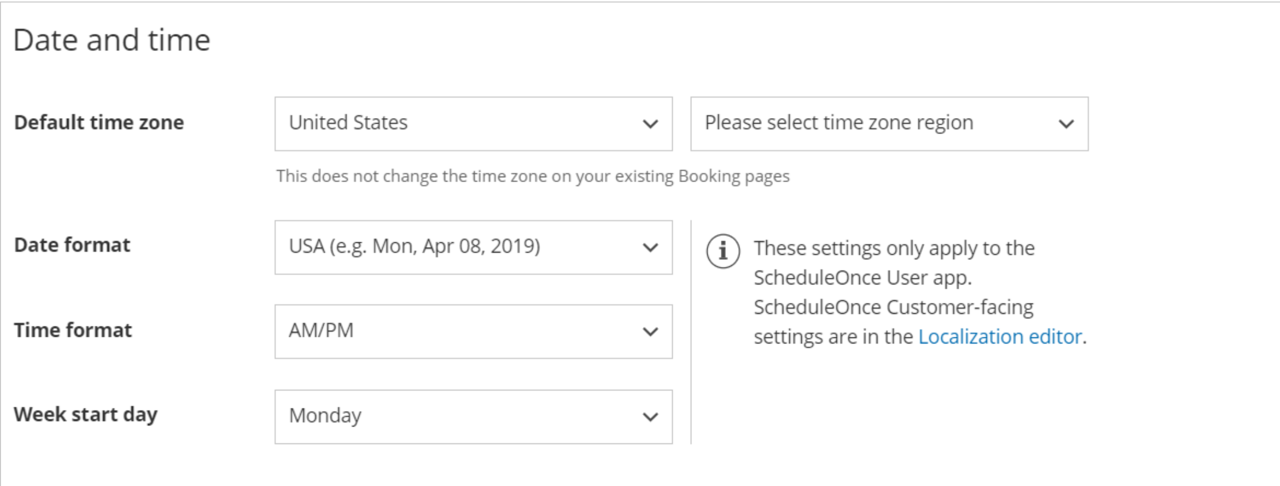


Figure 1: Date and time section

- 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 [Classic]

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.

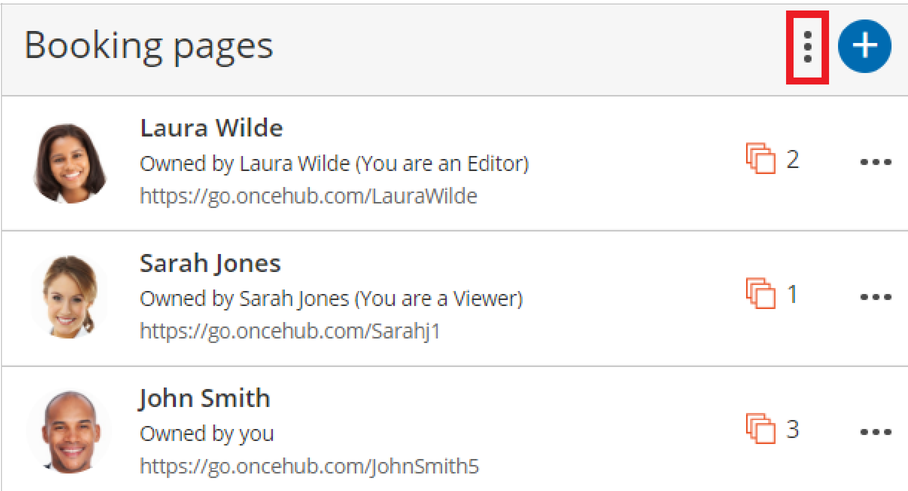


Figure 1: Booking page action menu

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.

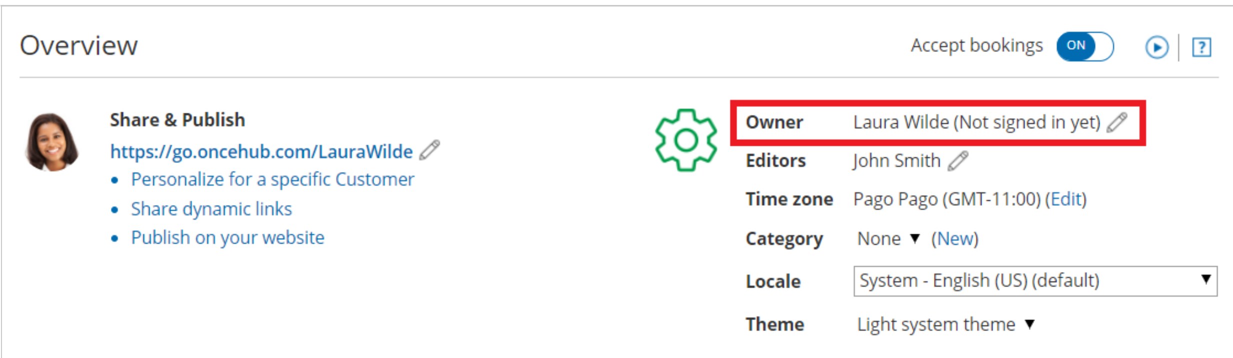


Figure 2: Booking page Overview section

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.

Duplicating a Booking page [Classic]

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).

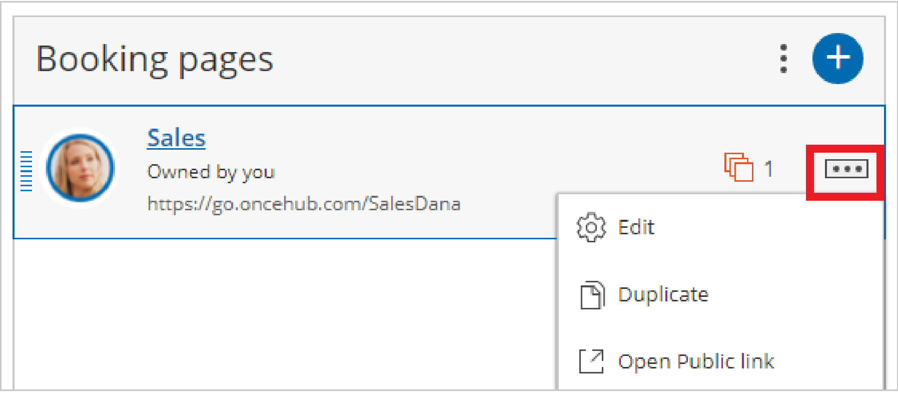


Figure 1: Individual Booking page action menu

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.

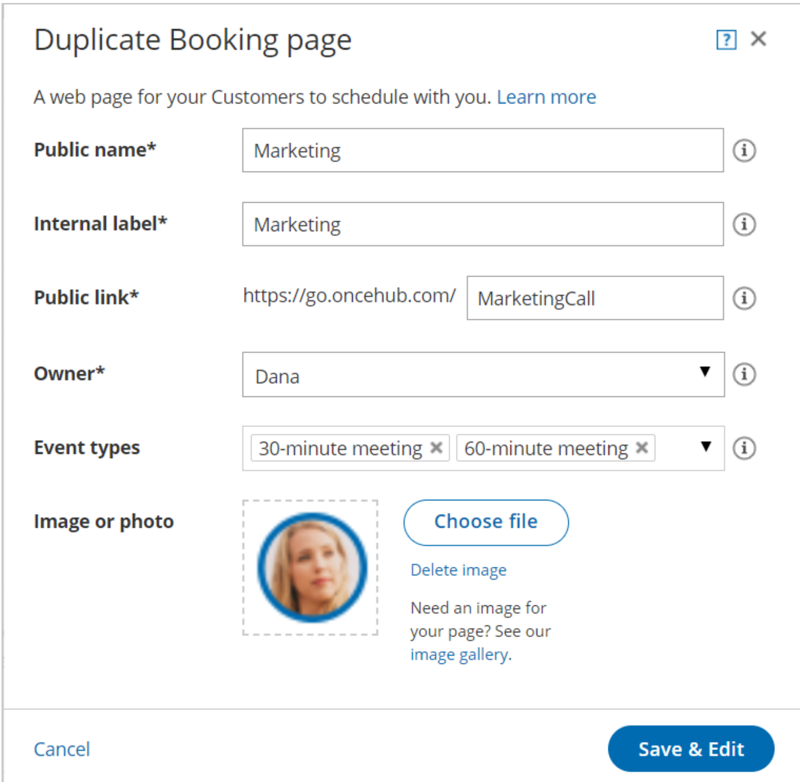


Figure 2: Duplicate Booking page popup

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.

Disabling your Booking page [Classic]

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).

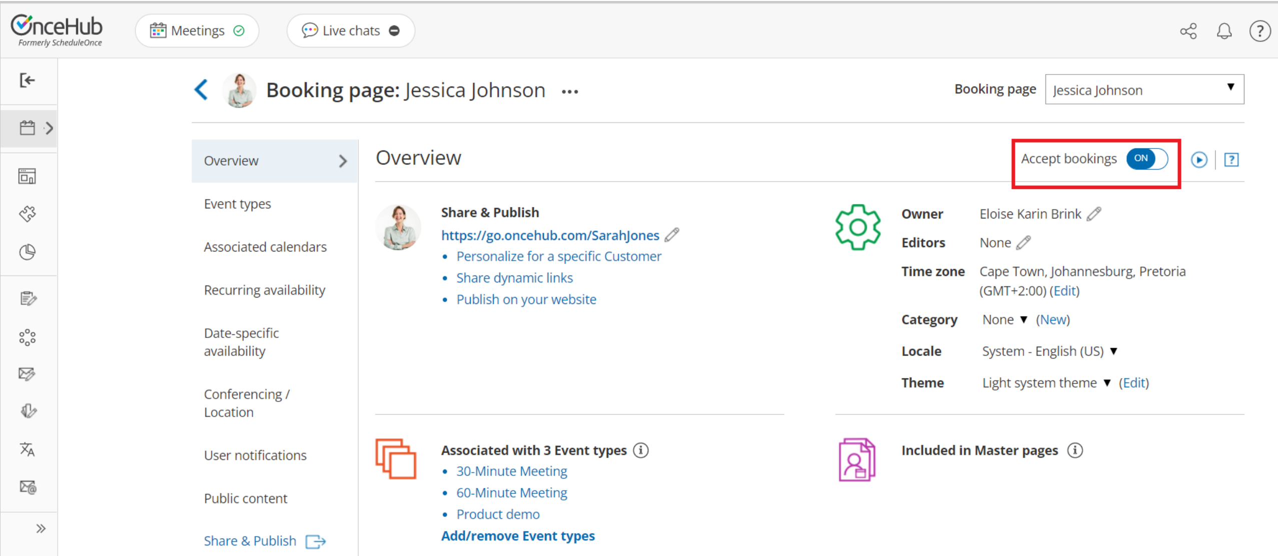


Figure 1: Booking page Enable/Disable toggle

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**.

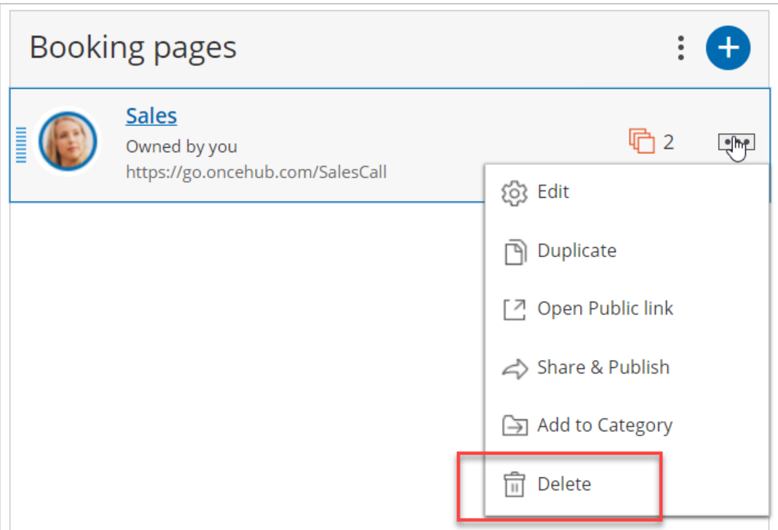


Figure 2: Deleting a Booking page

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.

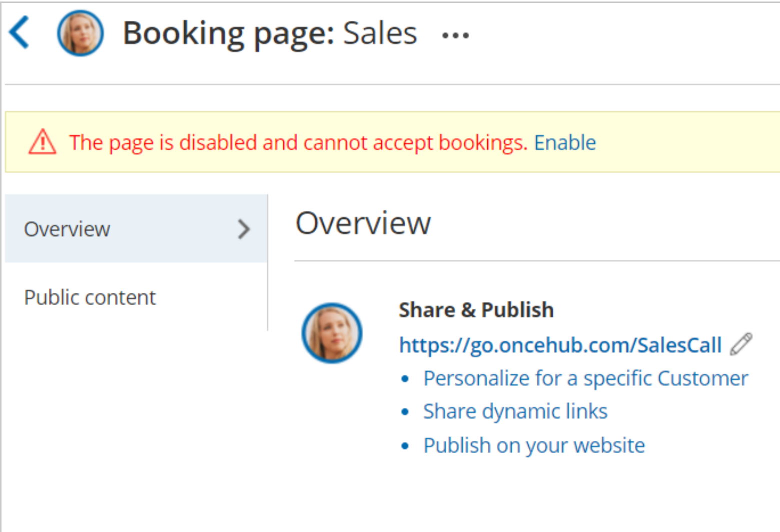


Figure 3: Booking page Enable link

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

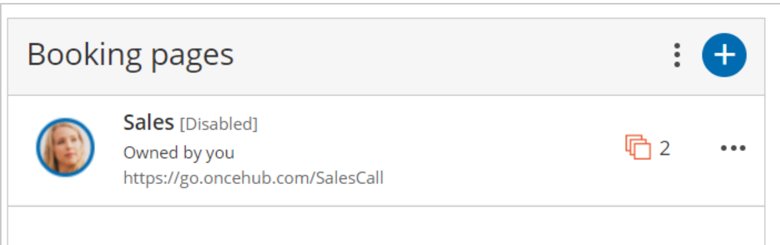


Figure 4: Disabled Booking page

- A **No times are currently available** message will show on your Booking page when Customers try to book with

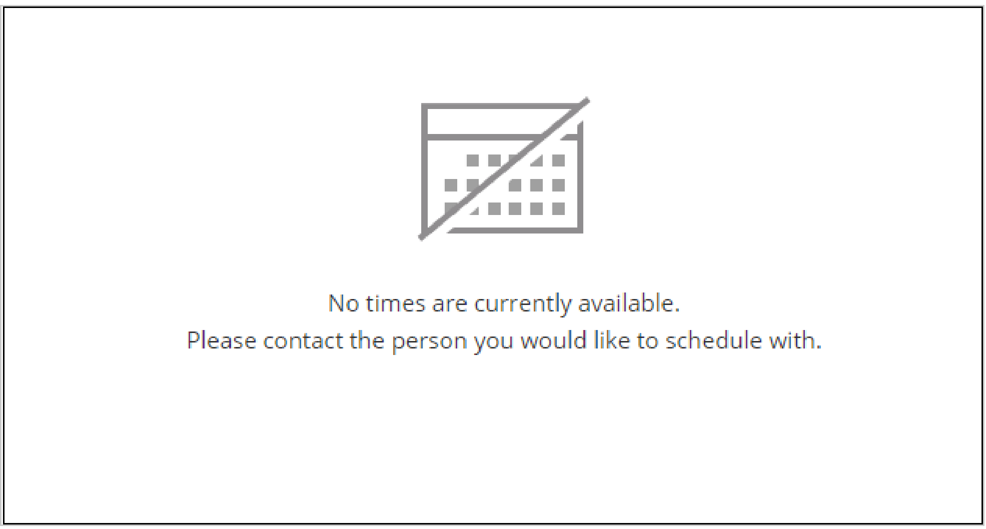


Figure 5: No times are currently available message

you (Figure 5).

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

Ensuring Customers reschedule with the same Booking page [Classic]

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 Booking pages only

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).

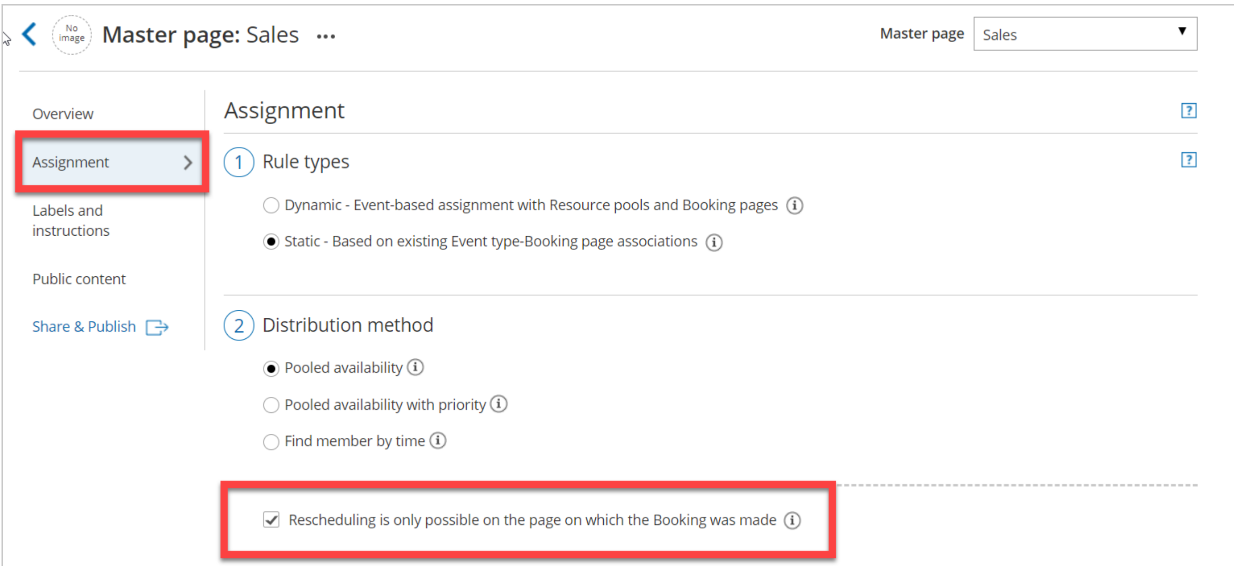


Figure 1: Limiting rescheduling on a Master page which uses Static rules

> **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).

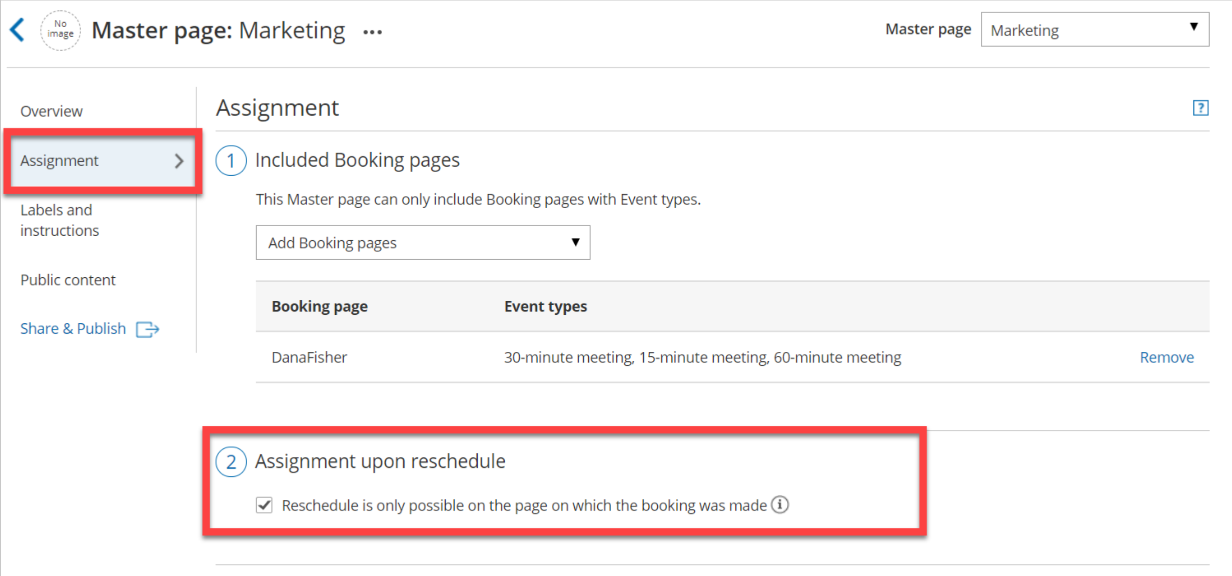


Figure 2: Limiting rescheduling on a Master page using Event types first or Booking pages first

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

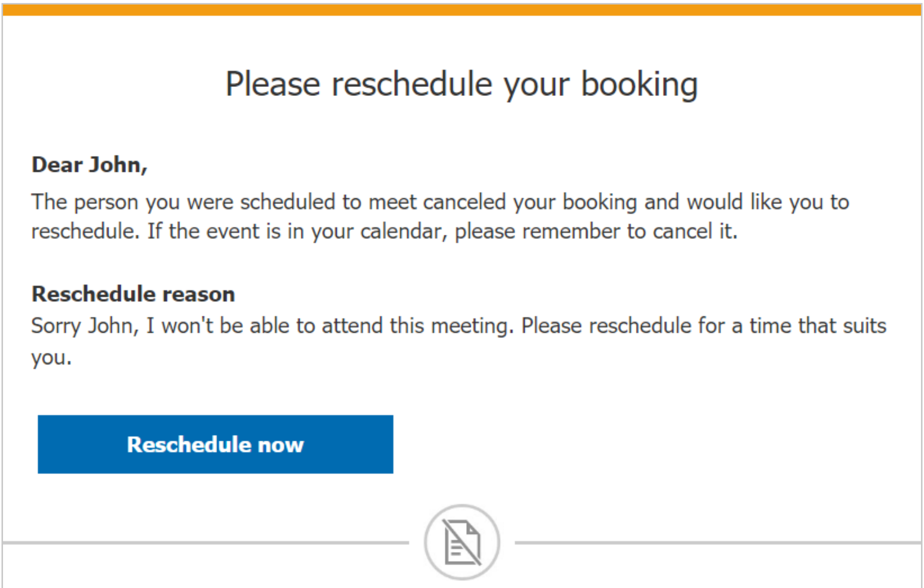


Figure 3: Reschedule request email notification to Customer

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

Introduction to Event types [Classic]

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 [Classic]

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).

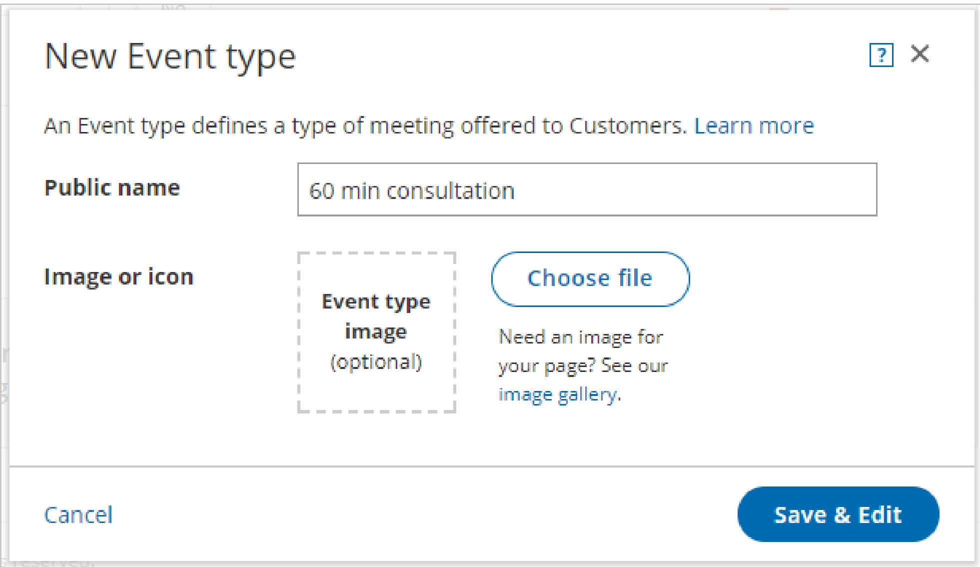


Figure 1: New Event type pop-up

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 Types Overview [Classic]

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).

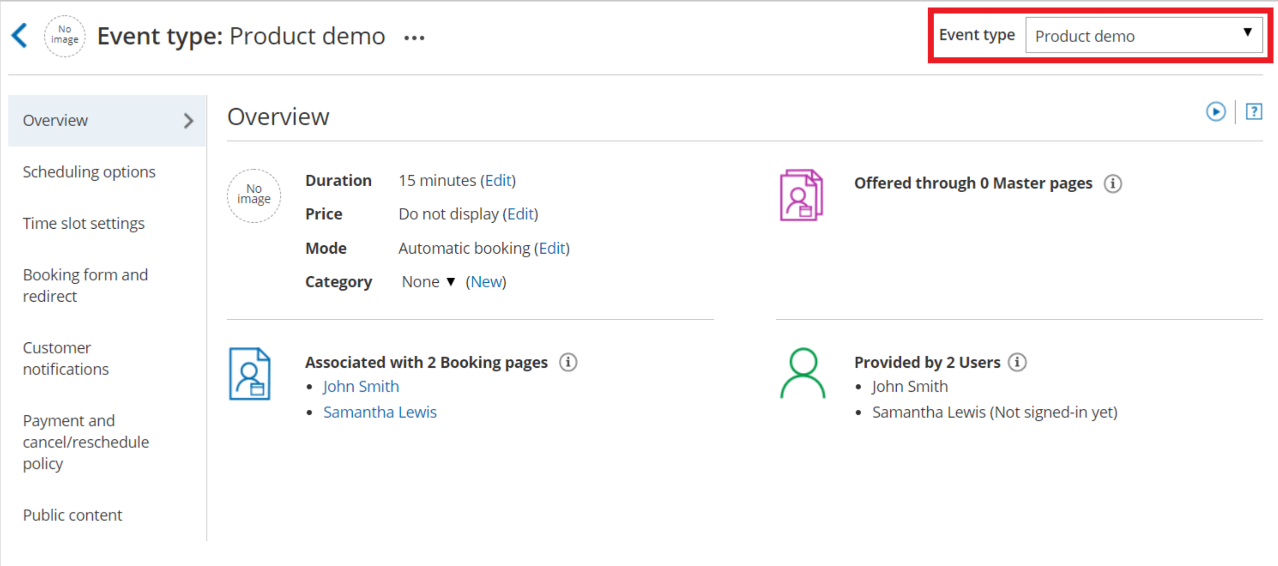


Figure 1: Event type Overview section

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.

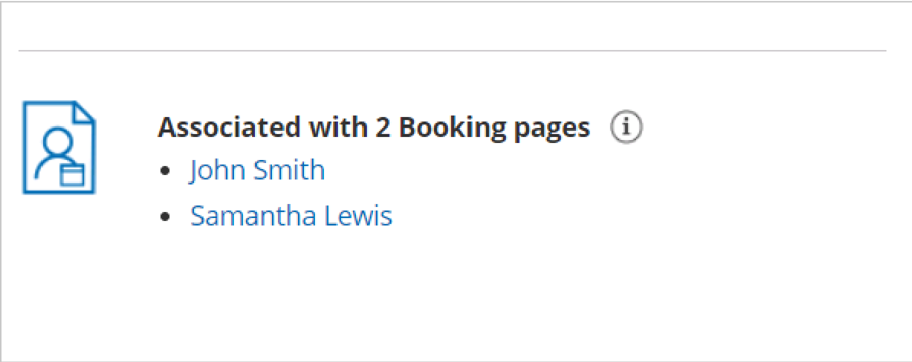


Figure 2: Associated Booking pages

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.

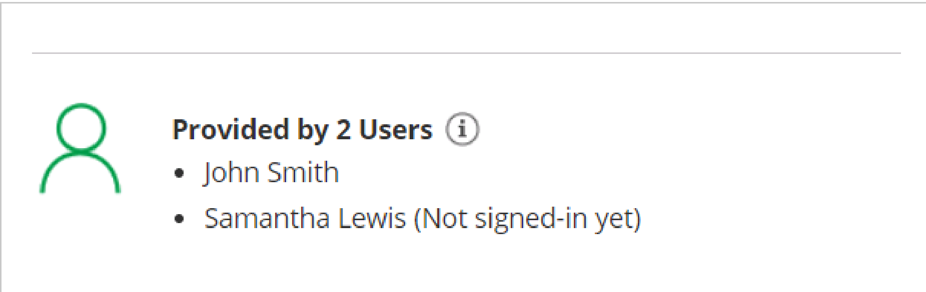


Figure 3: Users that provide the Event type

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.

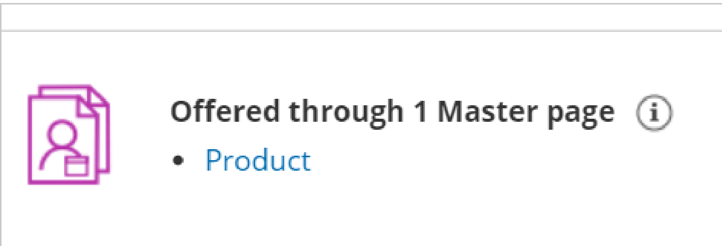


Figure 4: Master pages that offer the Event type

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 Booking pages only, 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

Public content [Classic]

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

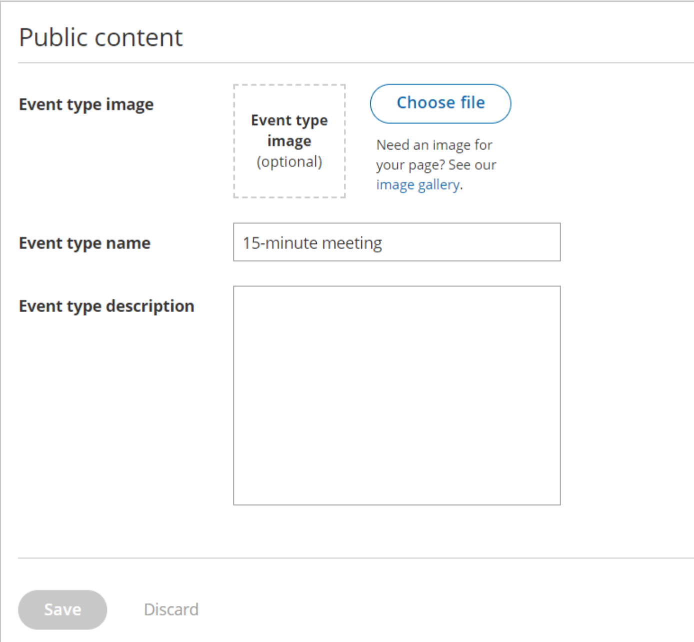


Figure 1: Public content section

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:

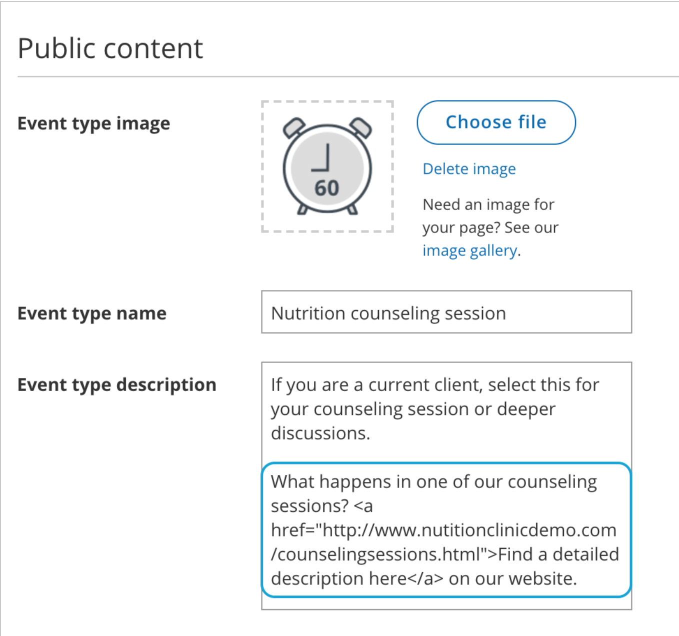


Figure 2: HTML link in the Event type description

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:

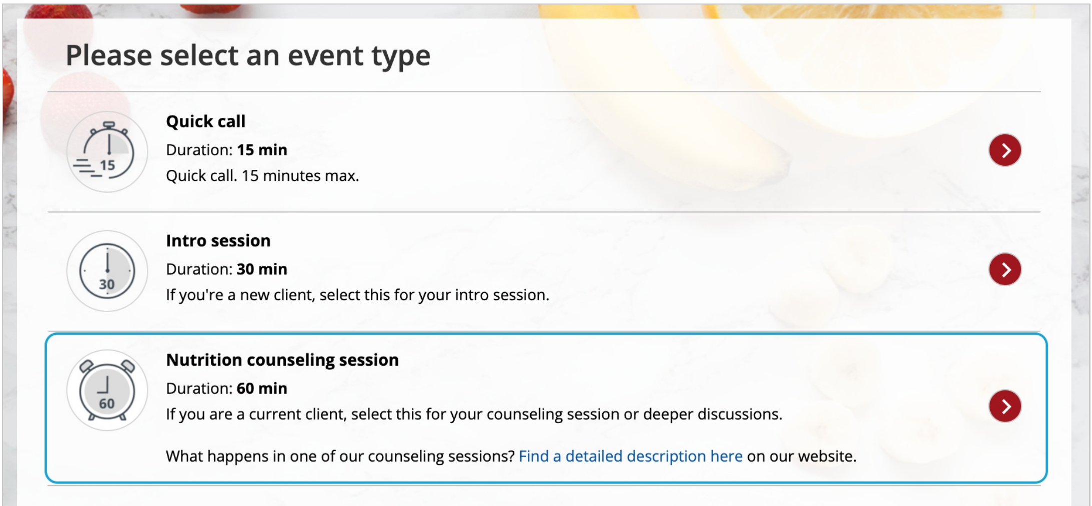


Figure 3: Event type description including HTML link

Payment and rescheduling [Classic]

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).

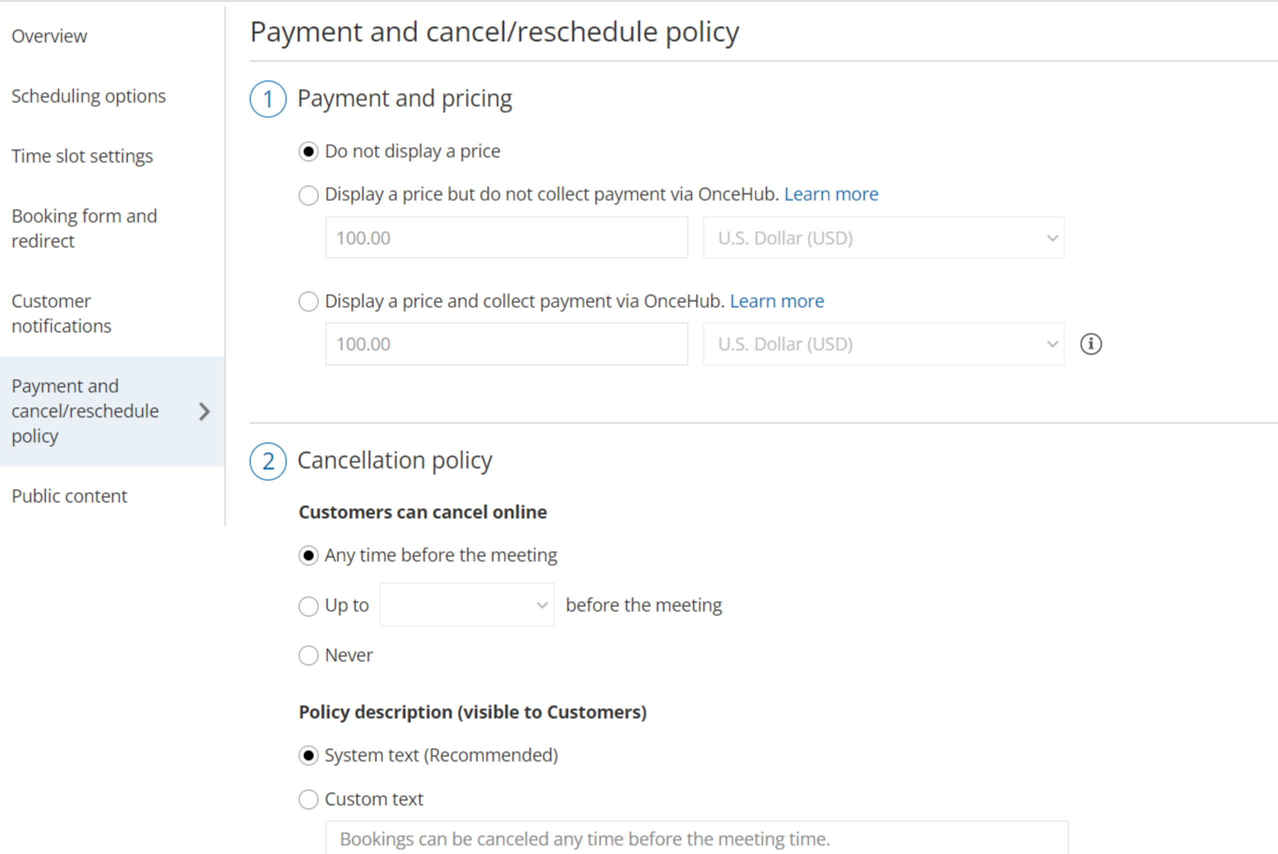


Figure 1: Payment and cancel/reschedule policy section

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

Payment and rescheduling: payment is collected [Classic]

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).

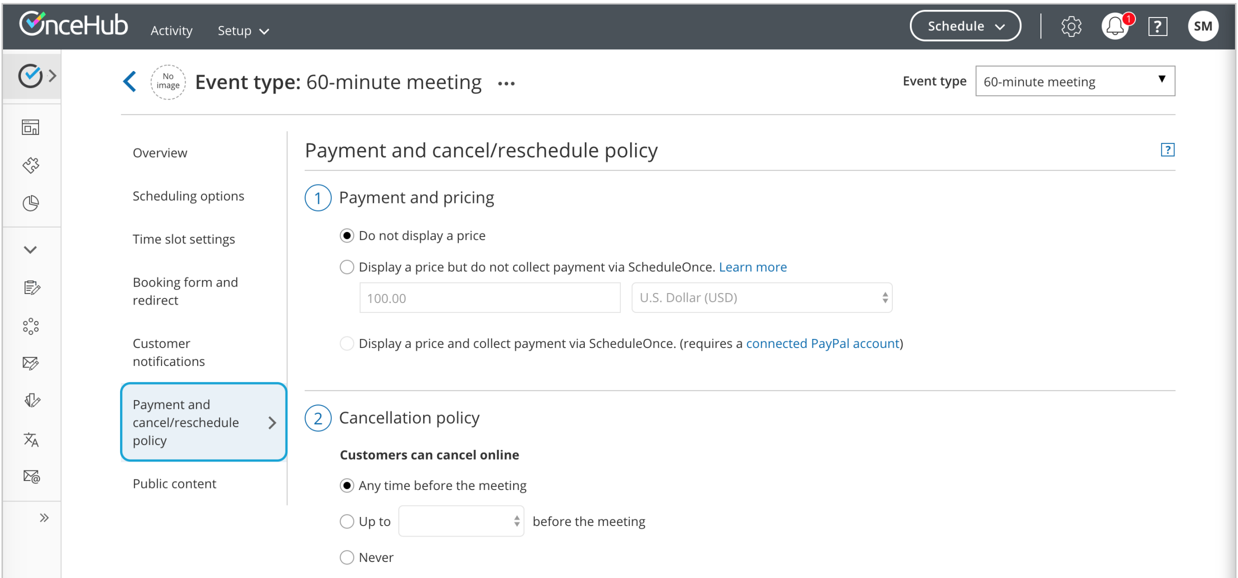


Figure 1: Payment and cancel/reschedule policy

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

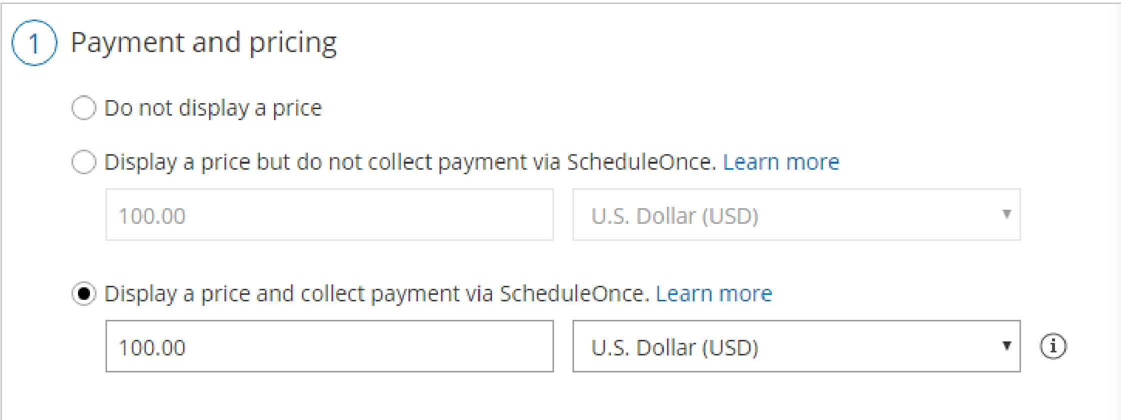


Figure 2: Payment and pricing step

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

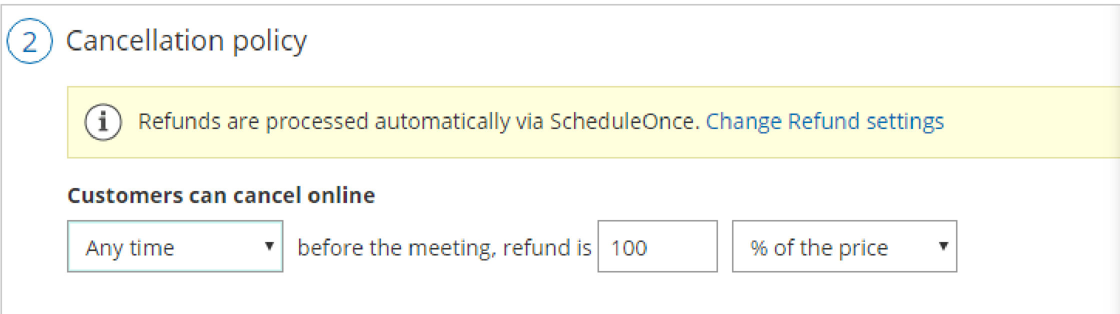


Figure 2: Cancellation policy

- **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**.

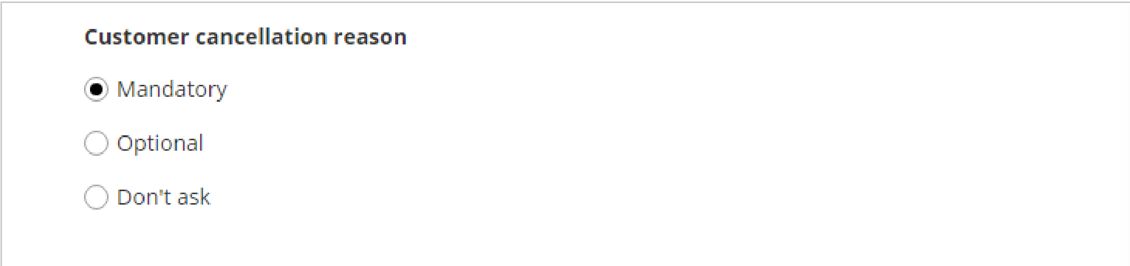


Figure 4: Customer cancellation reason

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

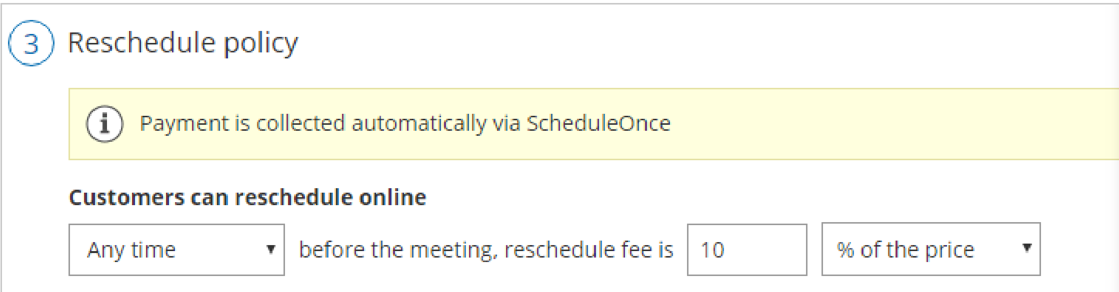


Figure 5: Reschedule policy

- **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**.

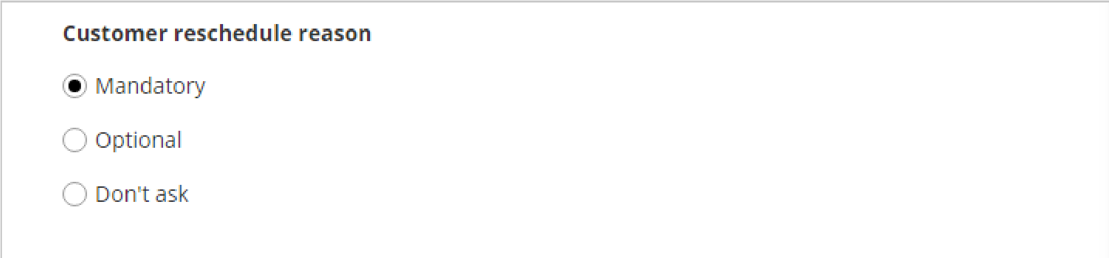


Figure 6: Customer reschedule reason

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.

Payment and rescheduling: price is displayed [Classic]

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).

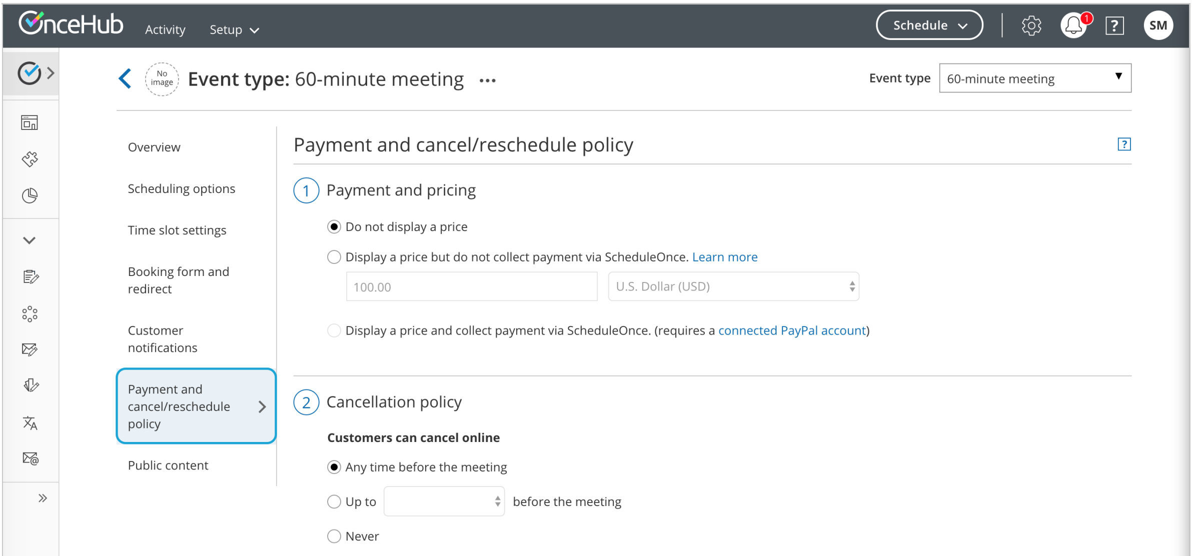


Figure 1: Payment and cancel/reschedule policy

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

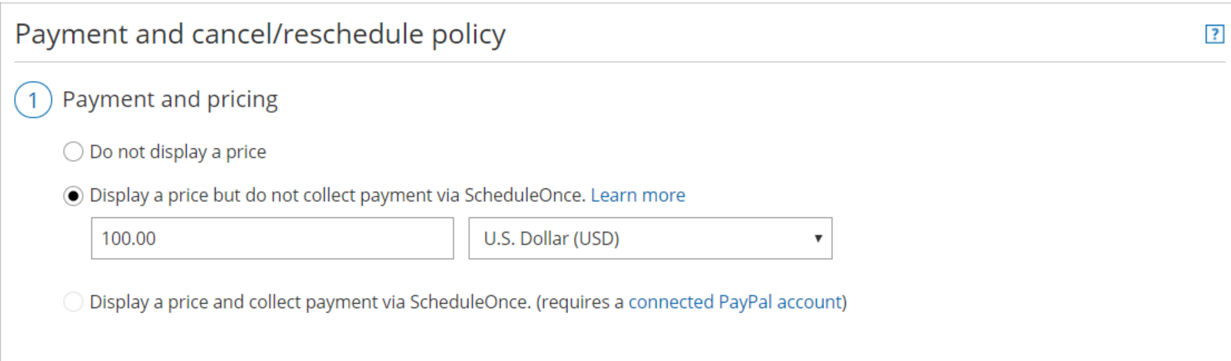


Figure 2: Payment and pricing

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

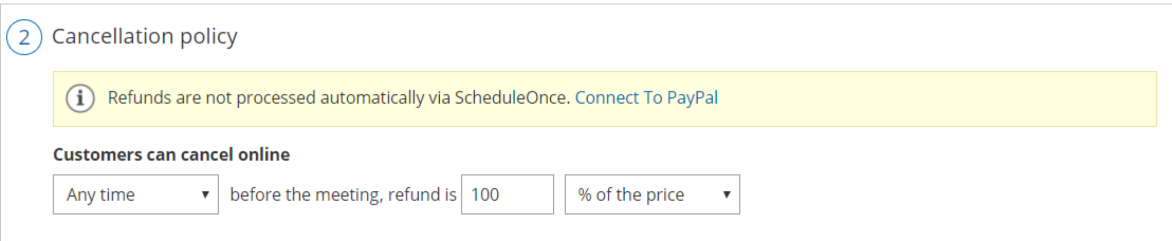


Figure 3: Cancellation policy

- **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**.

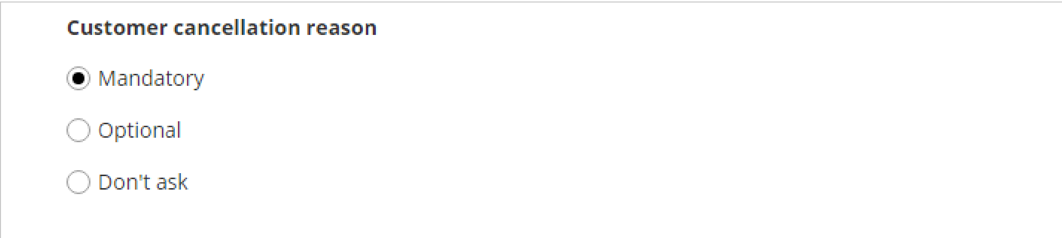


Figure 4: Customer cancellation reason

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

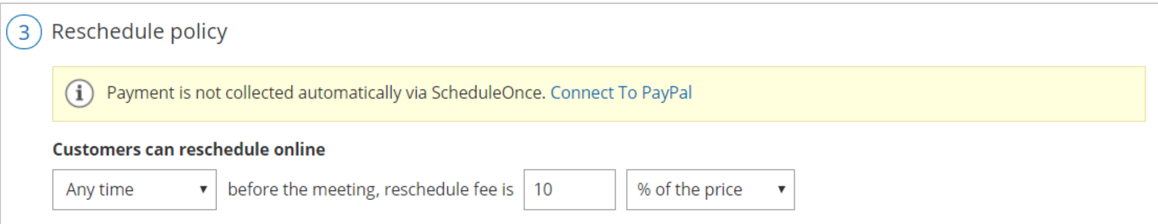


Figure 5: Reschedule policy

- **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**.

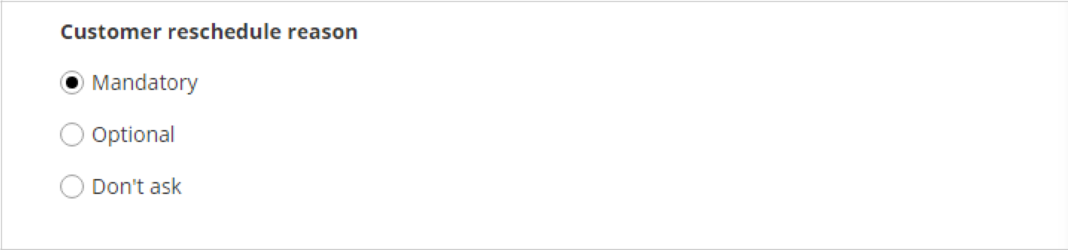


Figure 6: Customer reschedule reason

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

Payment and rescheduling: price is not displayed [Classic]

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).

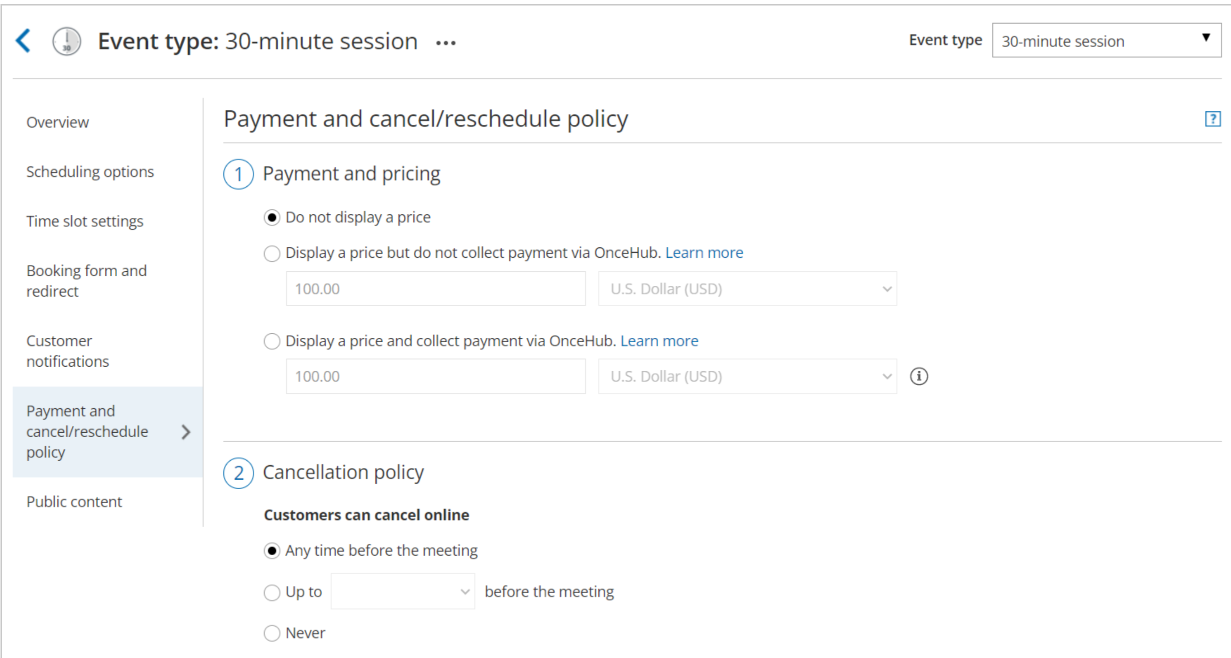


Figure 1: Payment and cancel/reschedule policy

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

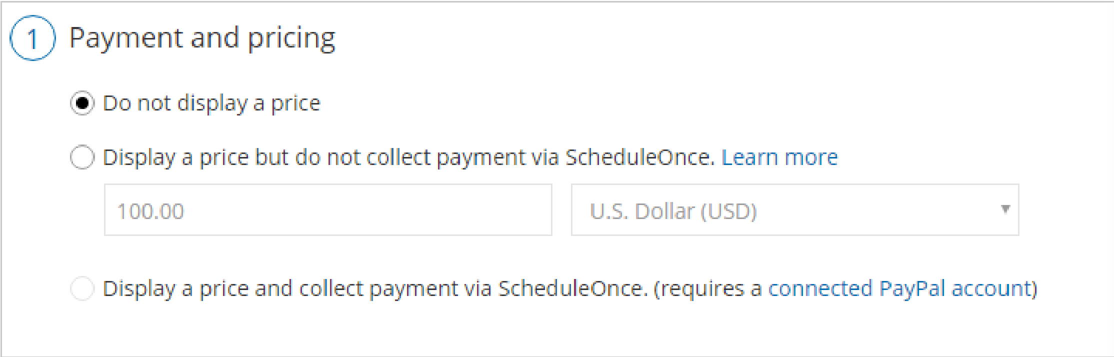


Figure 2: Payment and pricing step

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

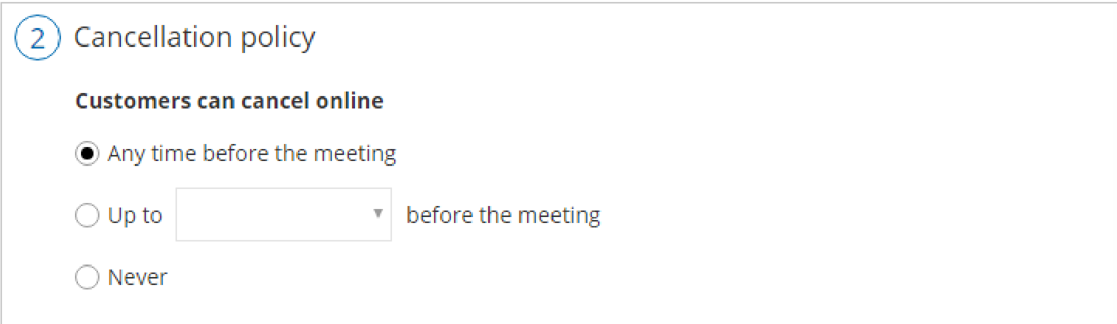


Figure 3: Cancellation policy

- **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**.

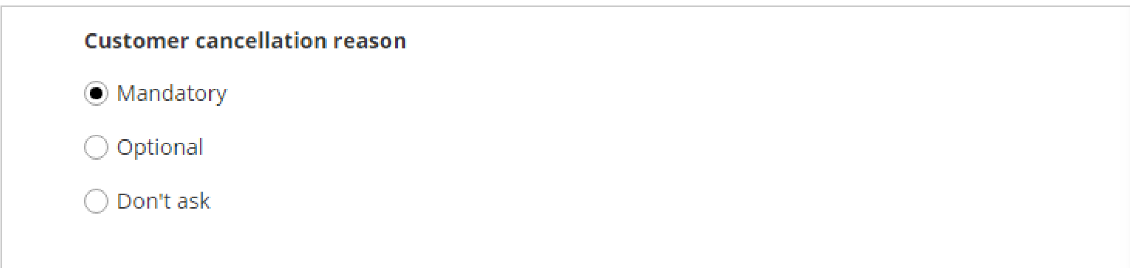


Figure 4: Customer cancellation reason

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

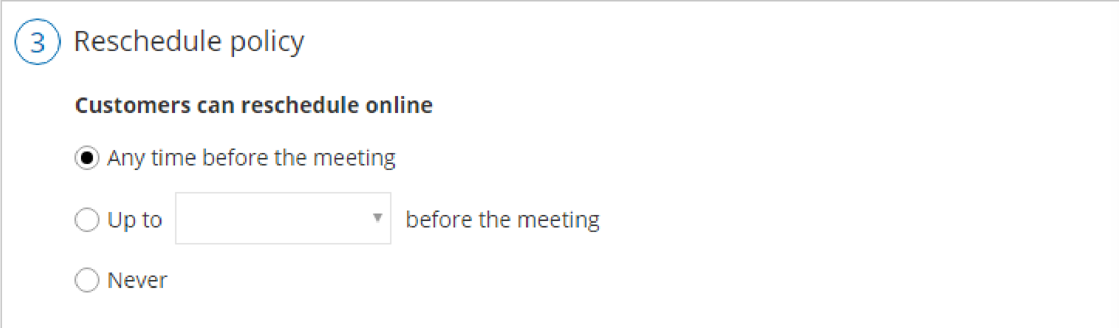


Figure 5: Reschedule policy

- **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**.

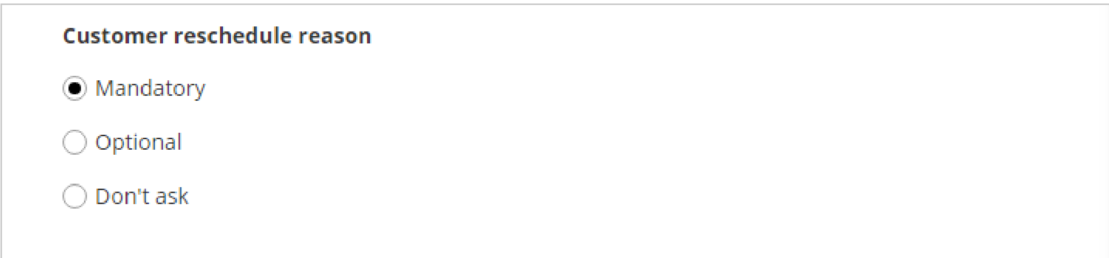


Figure 6: Customer reschedule reason

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

Booking form and Customer notifications [Classic]

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).

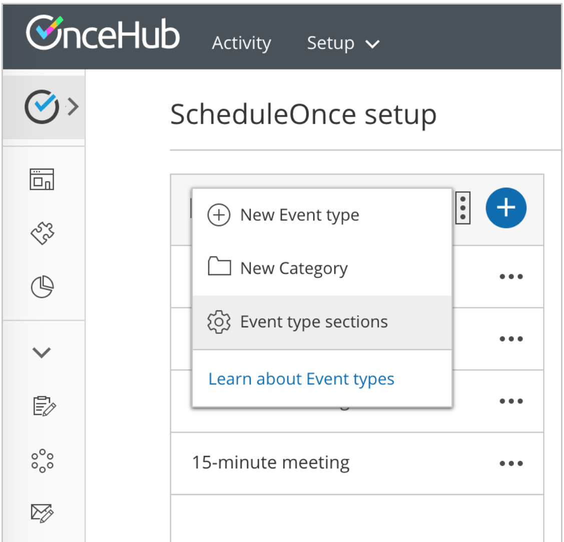


Figure 1: Event types action menu

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.

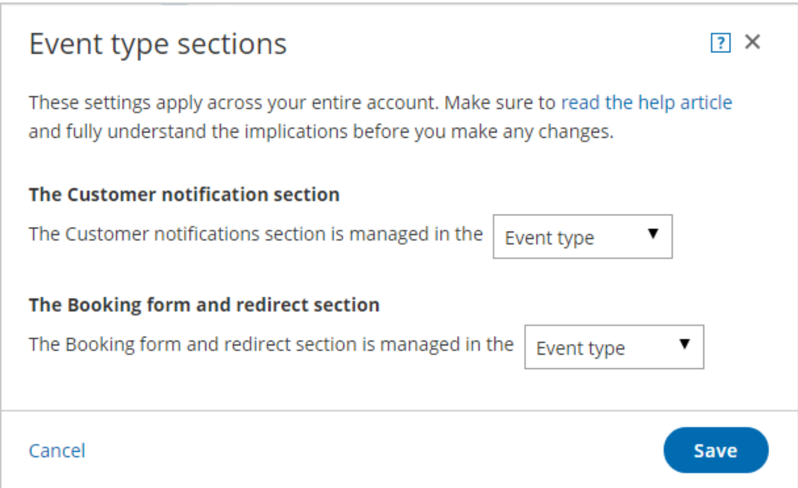


Figure 2: Event types sections popup

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.

Duplicating an Event type [Classic]

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).

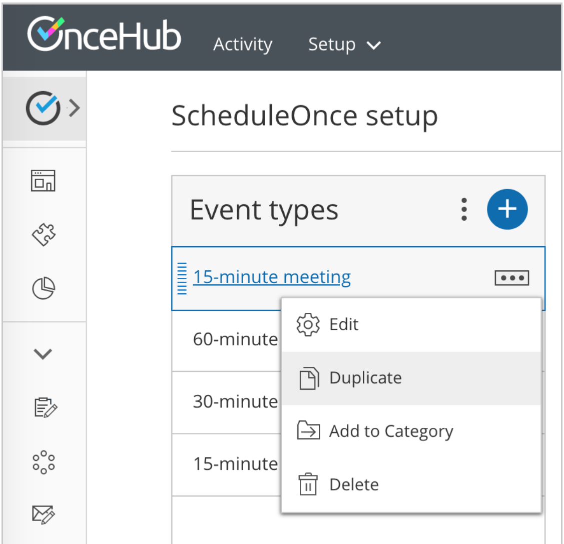


Figure 1: Individual Event type action menu

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.

Introduction to the Scheduling options [Classic]

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 [Classic]

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).

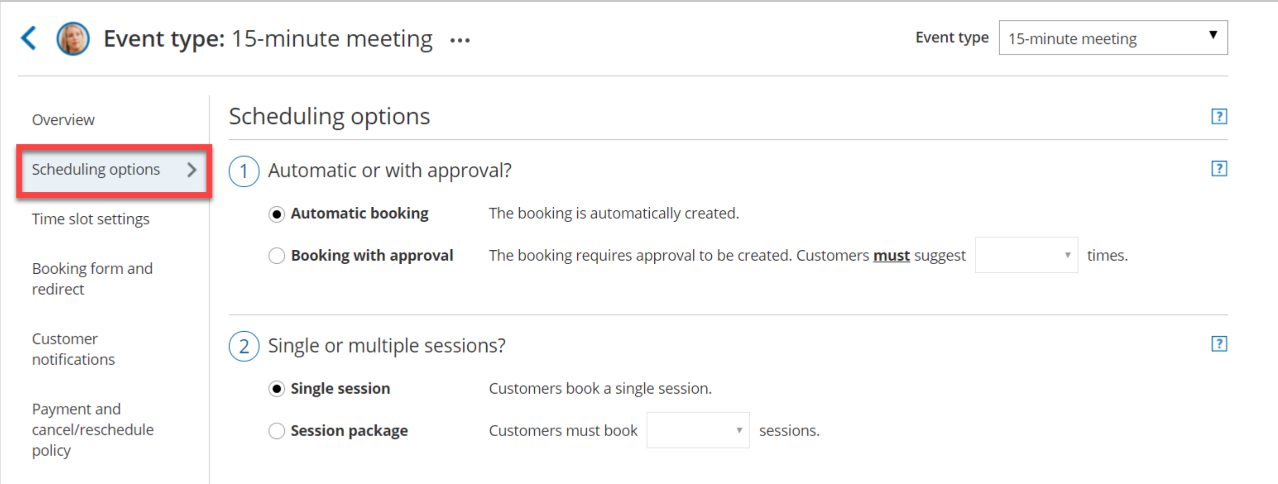


Figure 2: Scheduling options section when your Booking page is not associated with Event types

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).

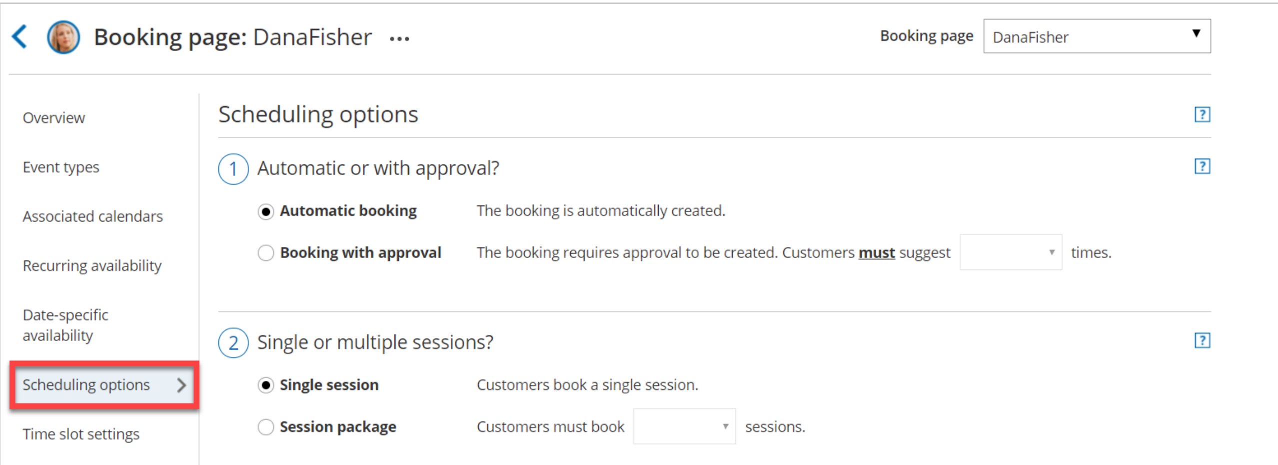


Figure 1: Scheduling options section when your Booking page has associated Event types

One-on-one or Group sessions [Classic]

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.

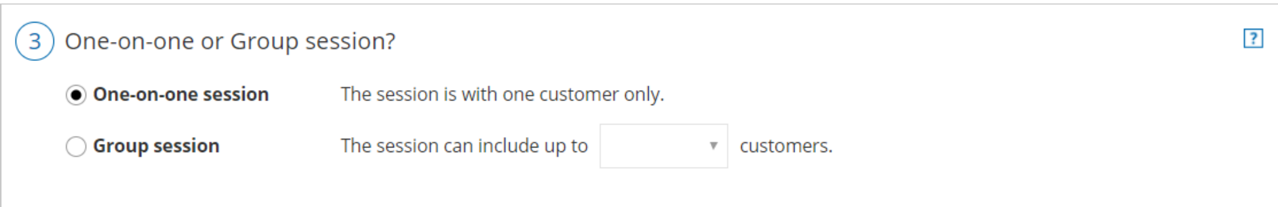


Figure 1: Scheduling options section

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 [Classic]

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.

Session packages [Classic]

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.

Conflicting settings when using Session packages [Classic]

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, or Pooled availability with priority. 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

Automatic booking or Booking with approval [Classic]

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.

Introduction to Time slot settings [Classic]

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 [Classic]

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).

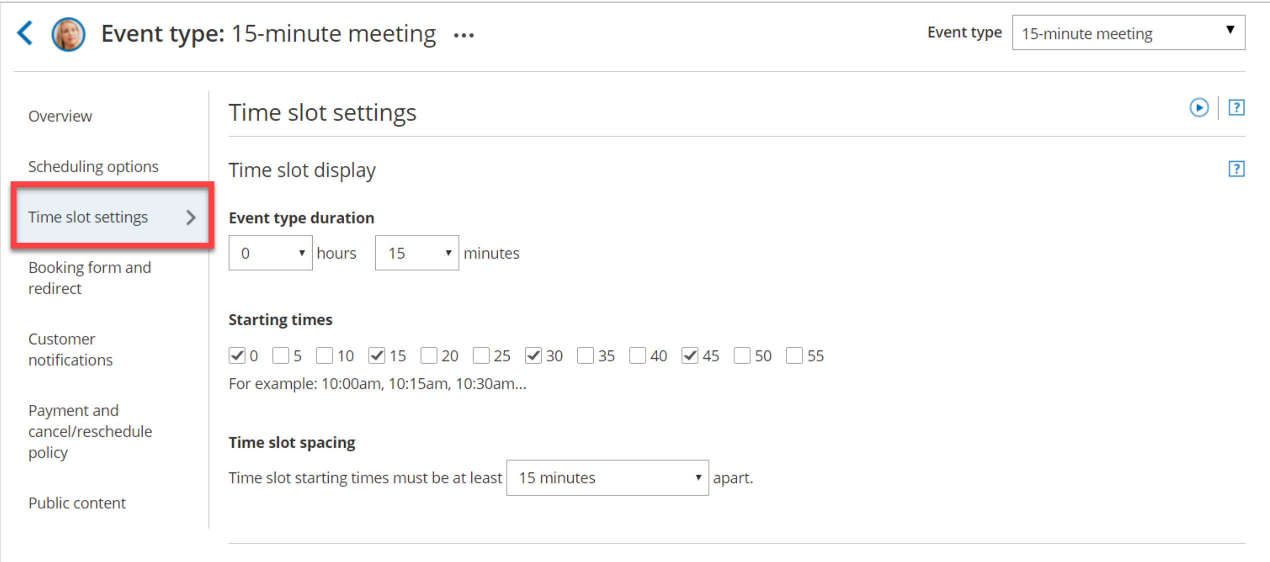


Figure 1: Time slot settings when your Booking page has associated Event types

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).

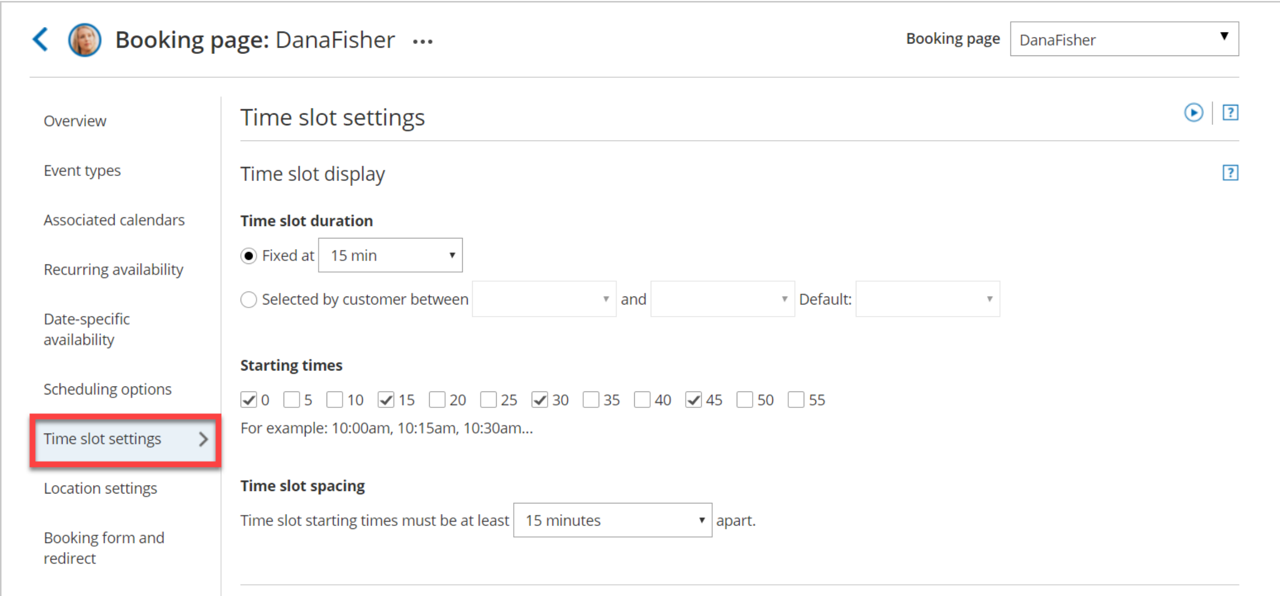


Figure 2: Time slot settings when your Booking page is not associated with Event types

Time slot display [Classic]

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.

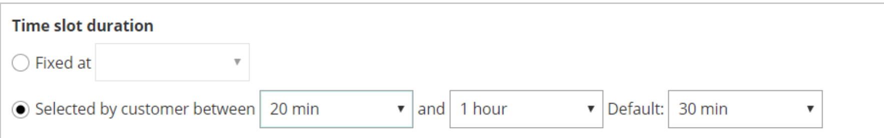


Figure 1: Time slot duration

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.

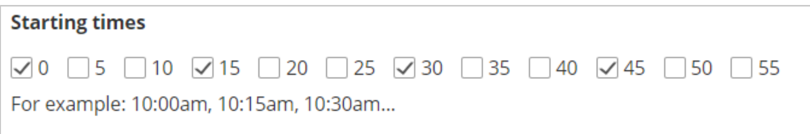


Figure 2: Starting times

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.

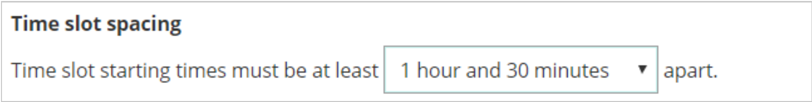


Figure 3: Time slot spacing

Workload rules [Classic]

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.

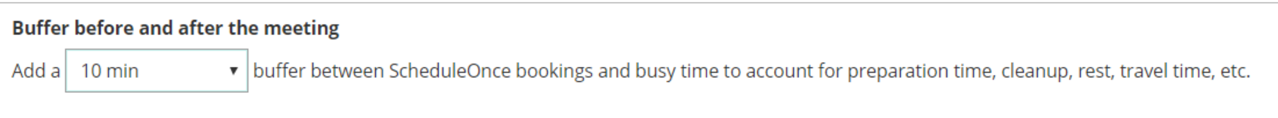


Figure 1: Buffer before and after the meeting

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

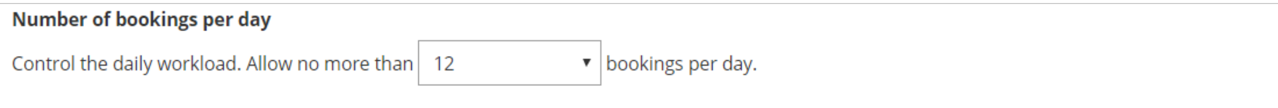


Figure 2: Number of bookings per day

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

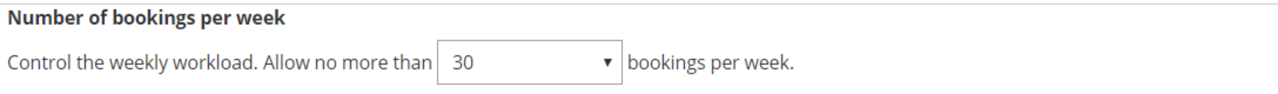


Figure 3: Number of bookings per week

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 [Classic]

Timeframe rules allow you to limit the timeframe for accepting bookings **Before an event** and **Into the future**.

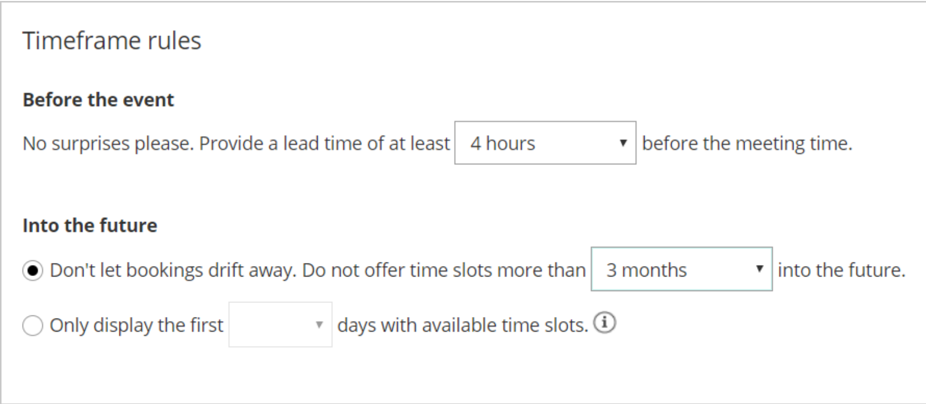


Figure 1: Timeframe rules section

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

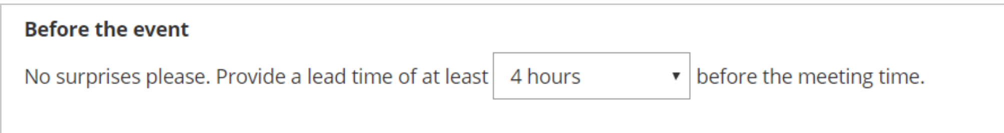


Figure 4: Before the event drop-down

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

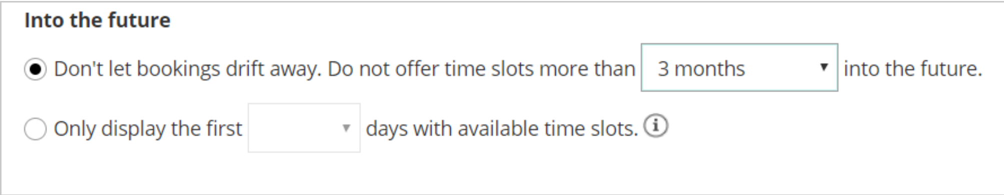


Figure 5: Into the future options

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 [Classic]

If you're offering bookings to Customers in multiple time zones, you can use Time zone conversion settings when they book with you.

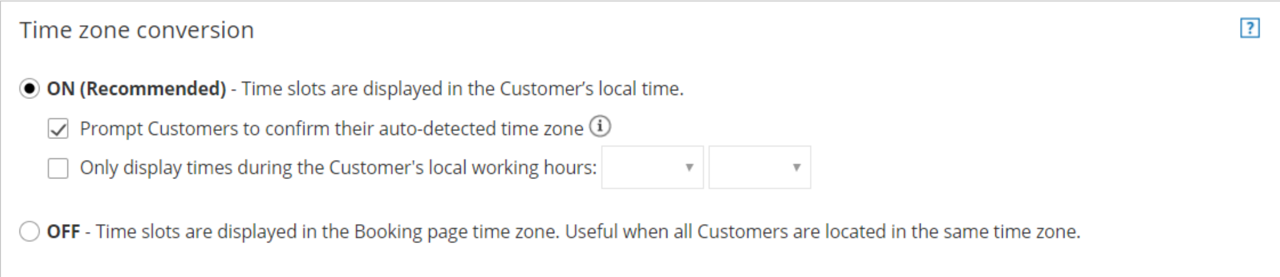


Figure 1: Time zone conversion

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.

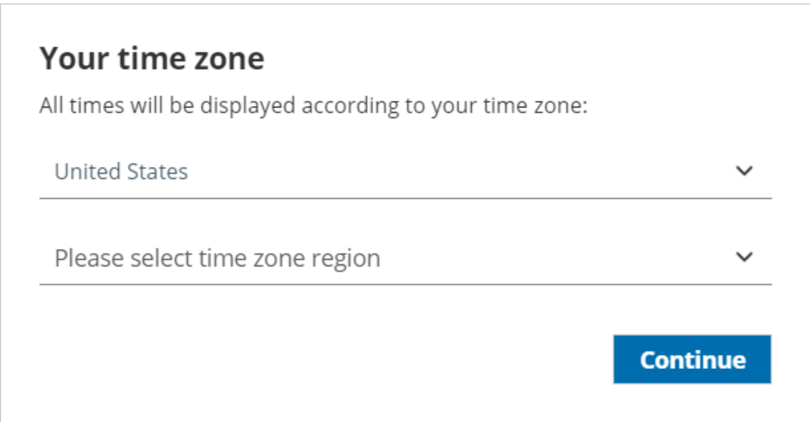


Figure 2: Time zone confirmation pop-up

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 [Classic]

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).

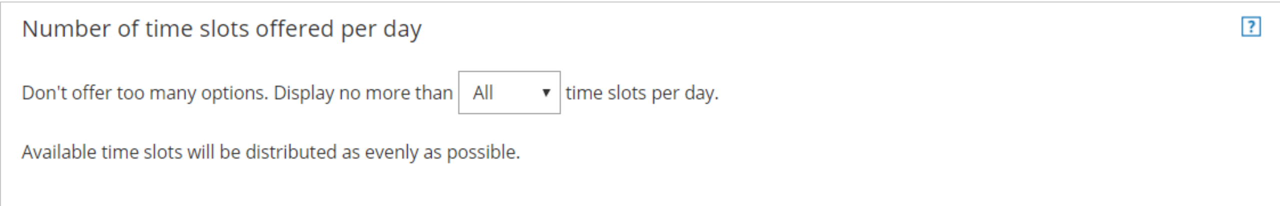


Figure 1: Number of time slots offered per day

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 [Classic]

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 [Classic]

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).

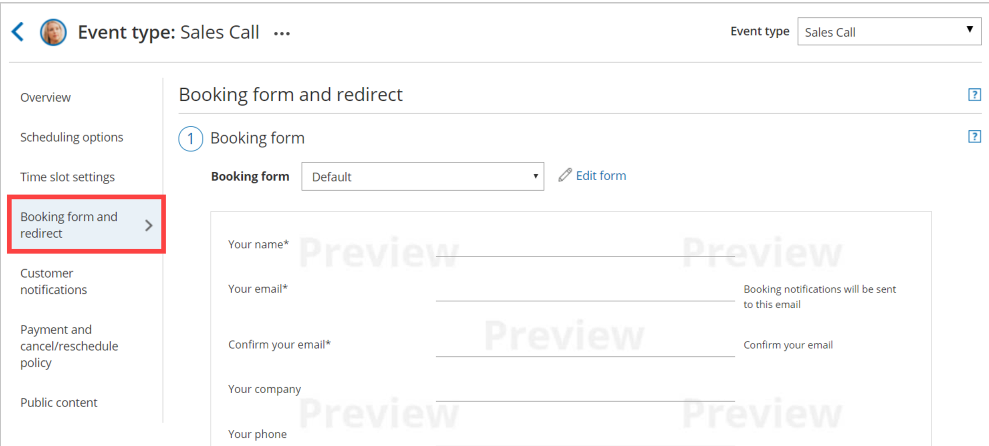


Figure 1: Booking form and redirect section on Event type

- 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).

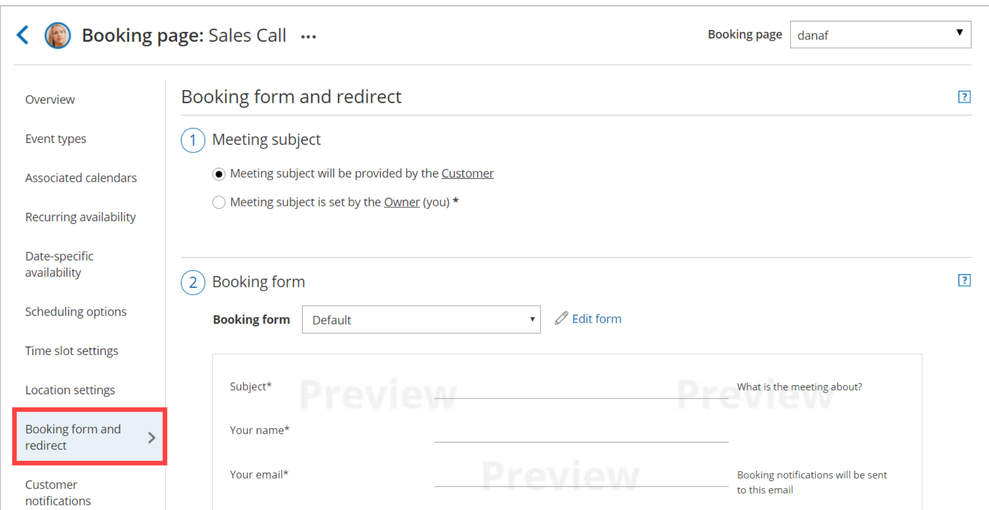


Figure 2: Booking form and redirect section on Booking page

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.

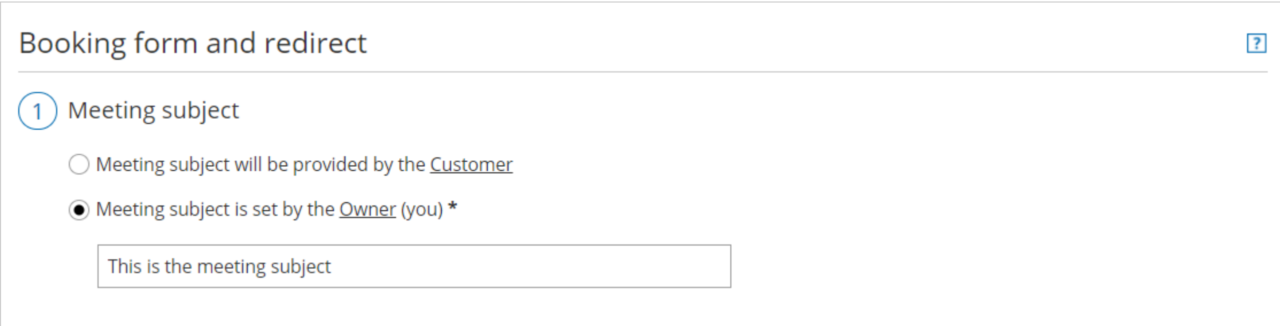


Figure 1: Meeting subject

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

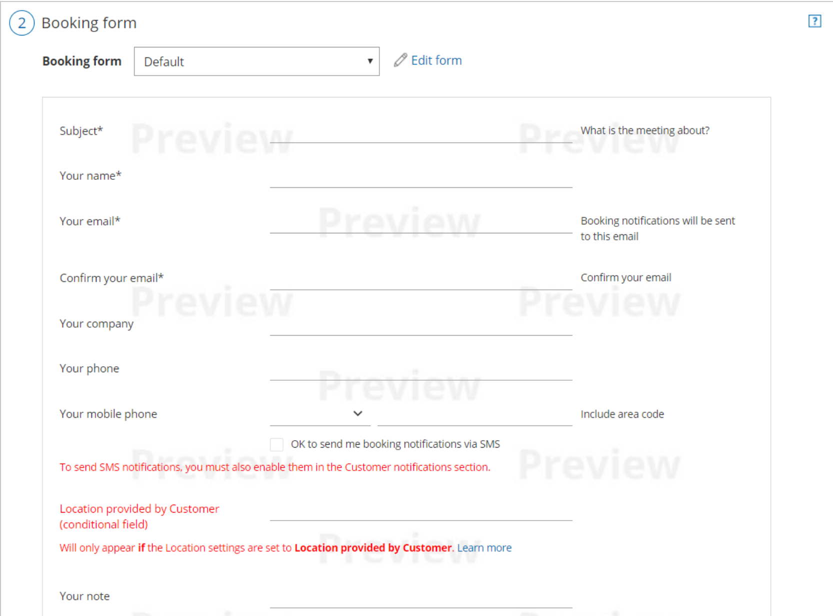


Figure 2: Booking form

Automatic redirect

This setting allows you to decide what will happen after your Customers complete the booking process.

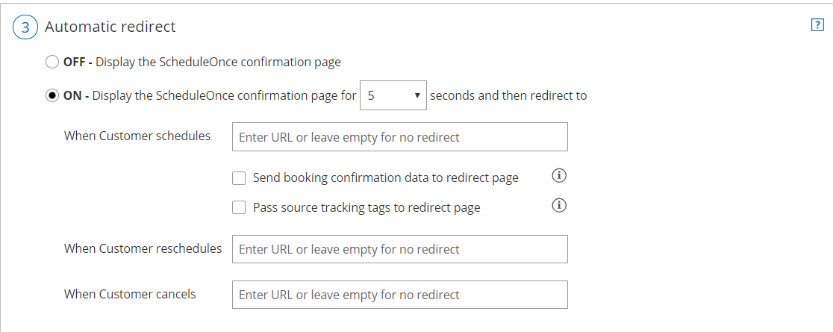


Figure 3: Automatic redirect

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 [Classic]

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.

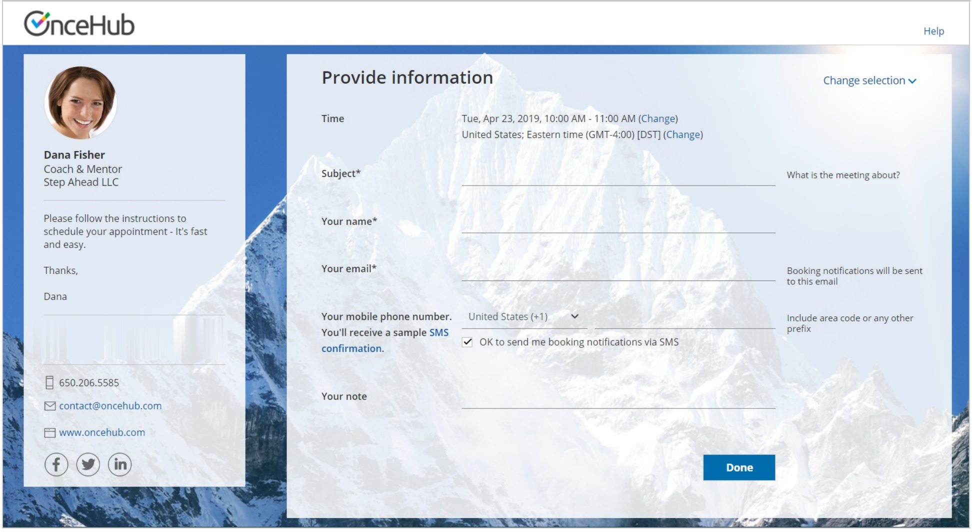


Figure 1: Sample Booking form

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 [Classic]

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.

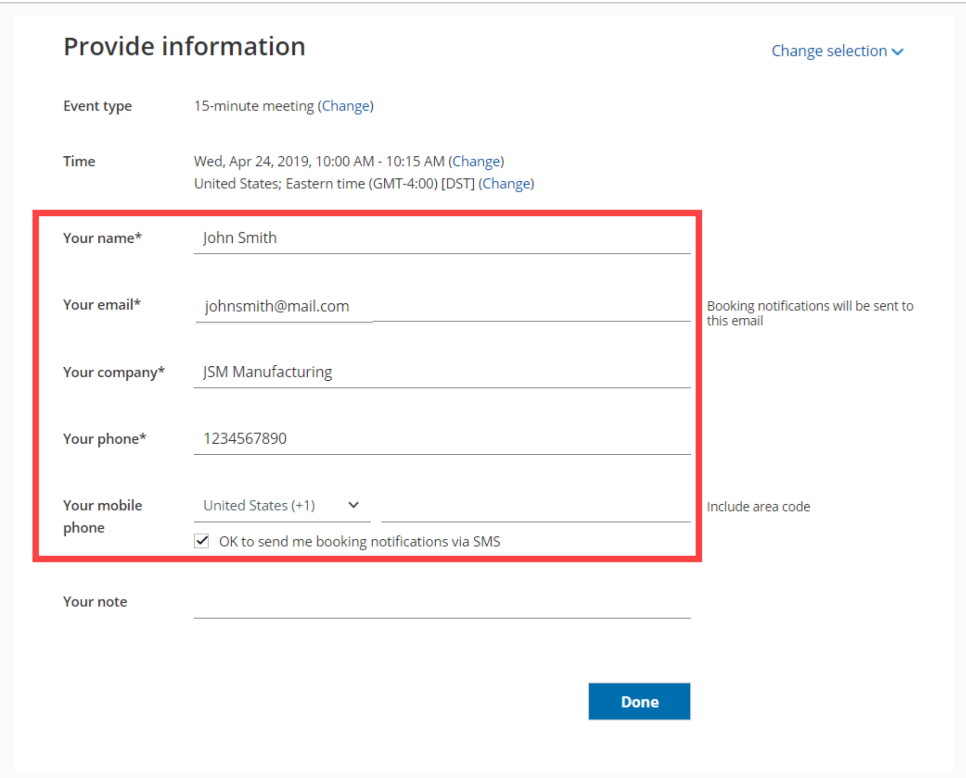


Figure 1: Booking form with data prepopulated from URL parameters

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.

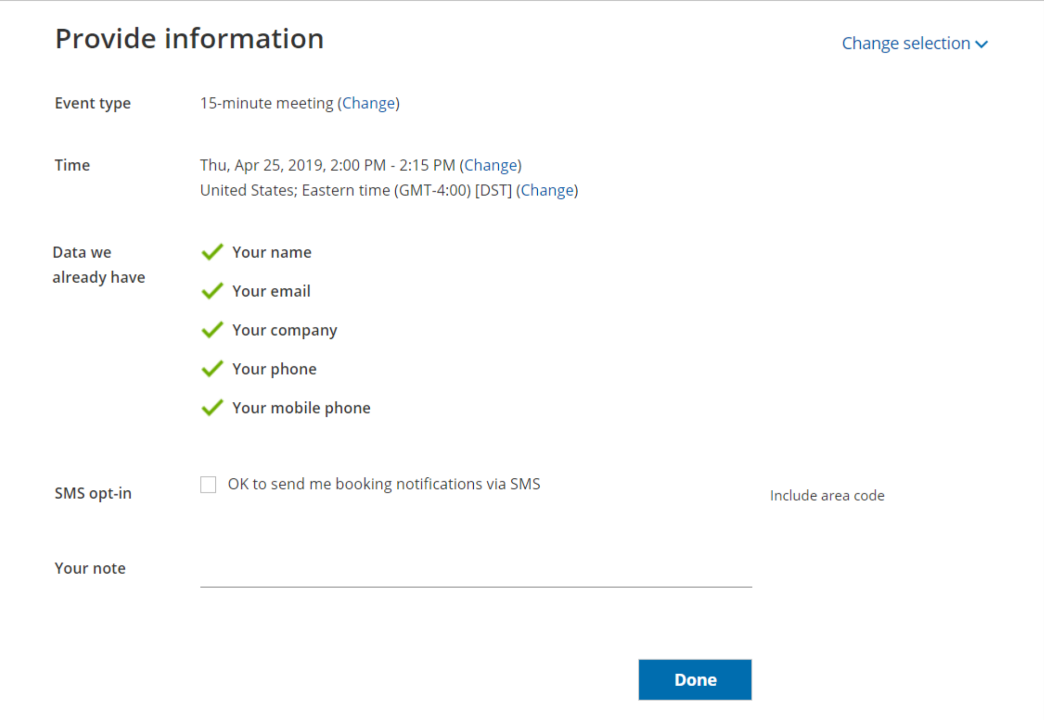


Figure 2: Data prepopulated from a database

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 [Classic]

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.

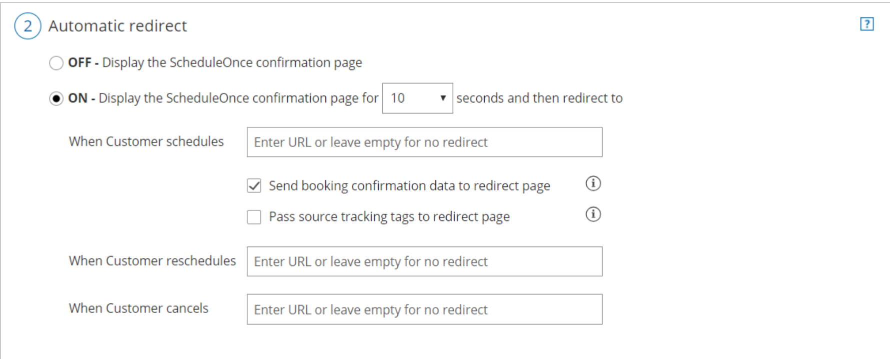


Figure 1: Automatic redirect settings

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 [Classic]

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).

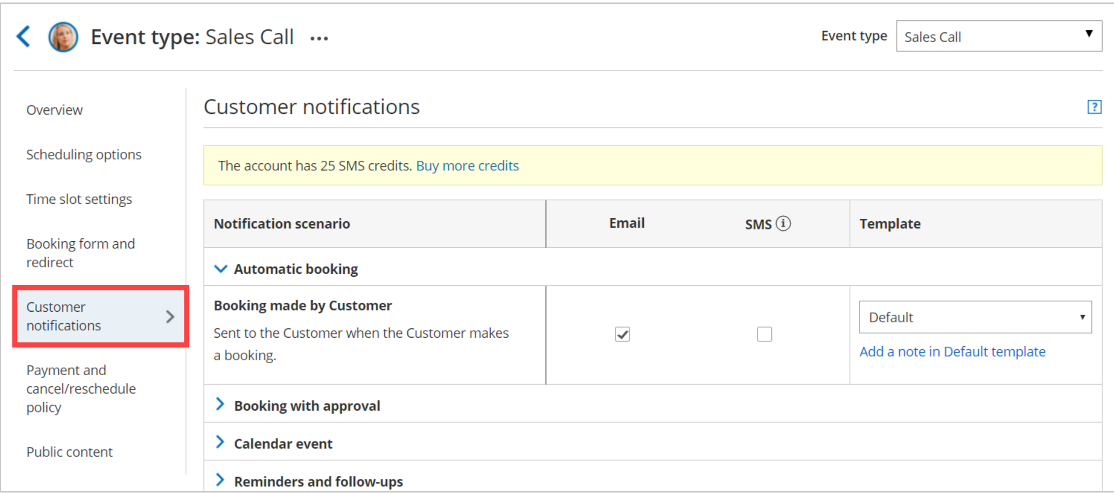


Figure 1: Customer notifications section on Event type

- 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).

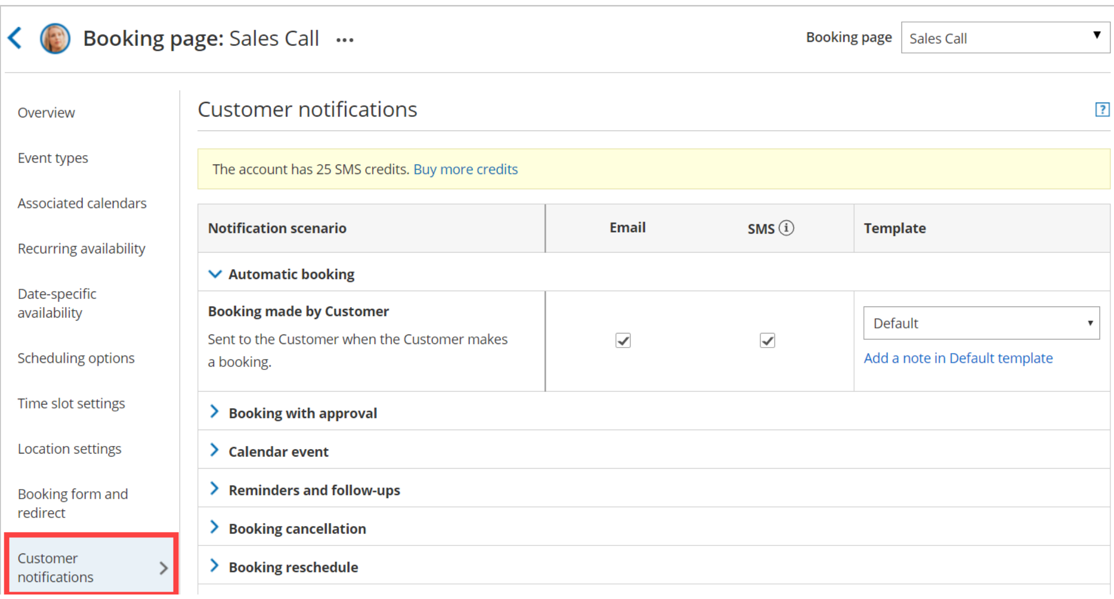


Figure 2: Customer notifications section on Booking page

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).

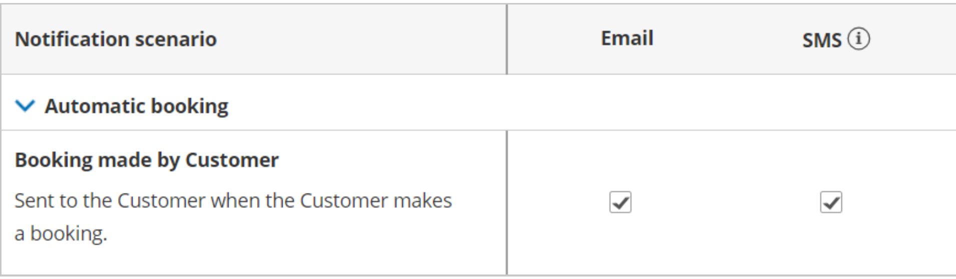


Figure 3: Email notification and SMS notification selected

The exception is the Calendar event scenario, which has no SMS notification option (Figure 4).

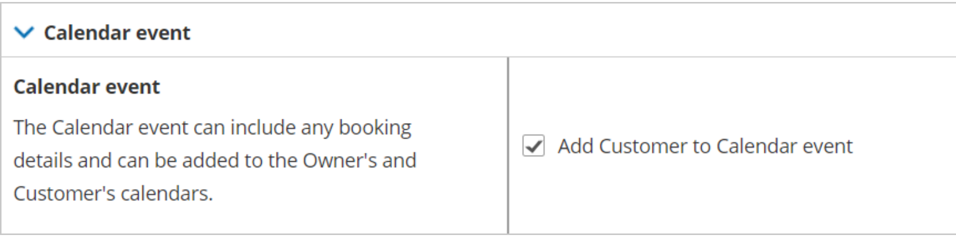


Figure 4: Calendar event notification option

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.

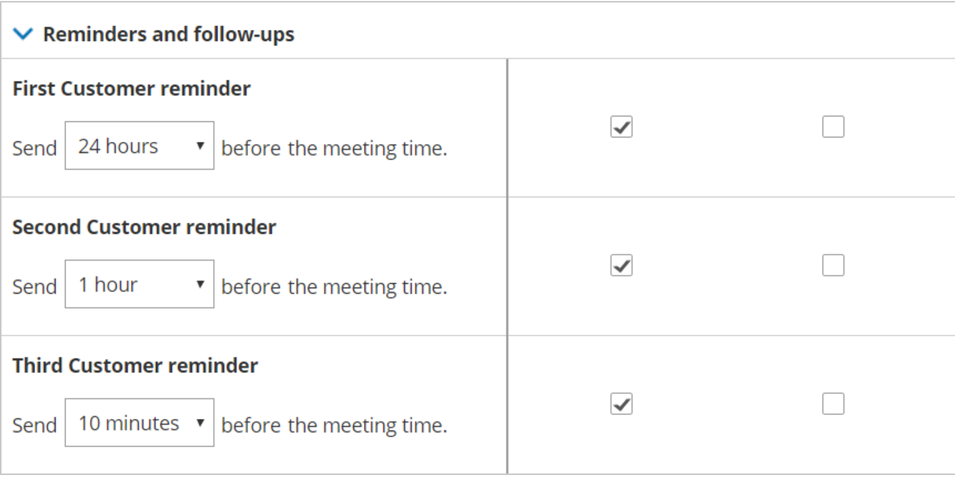


Figure 5: Customer reminder options

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).

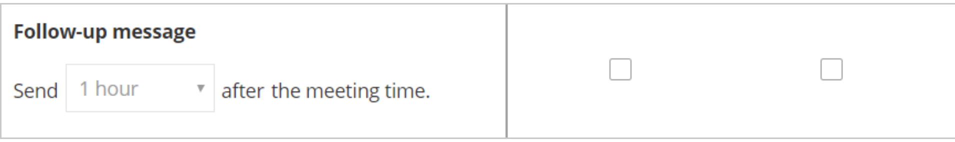


Figure 6: Follow-up message option

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).

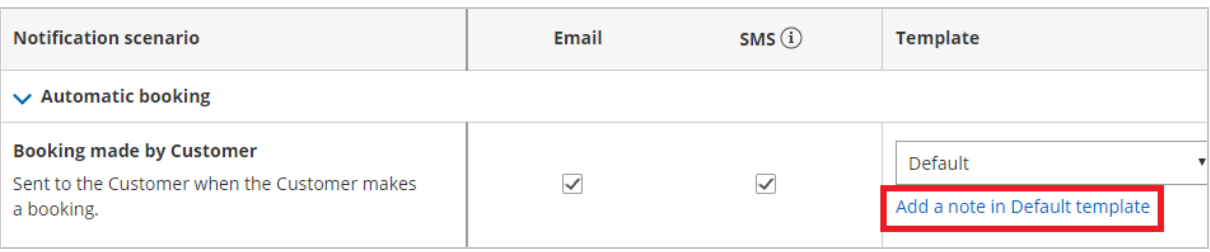


Figure 7: Add a note to your notification email

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

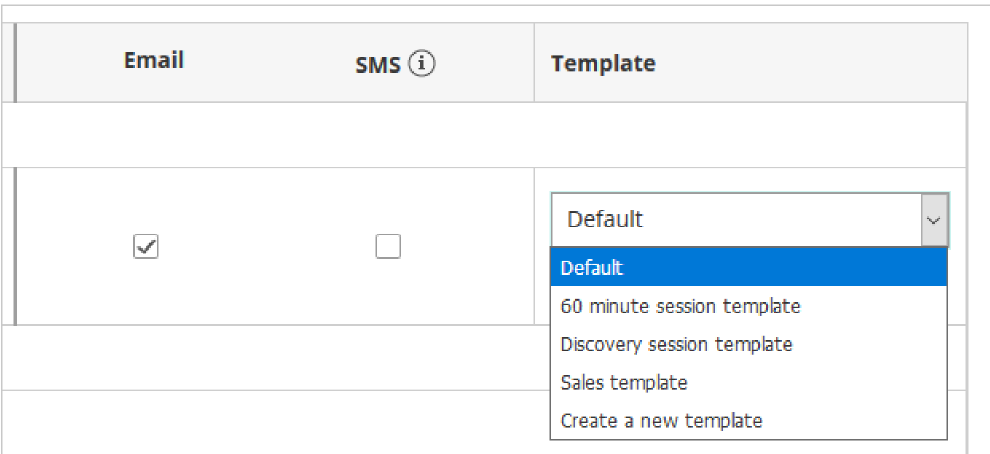


Figure 9: Choosing a custom template

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).

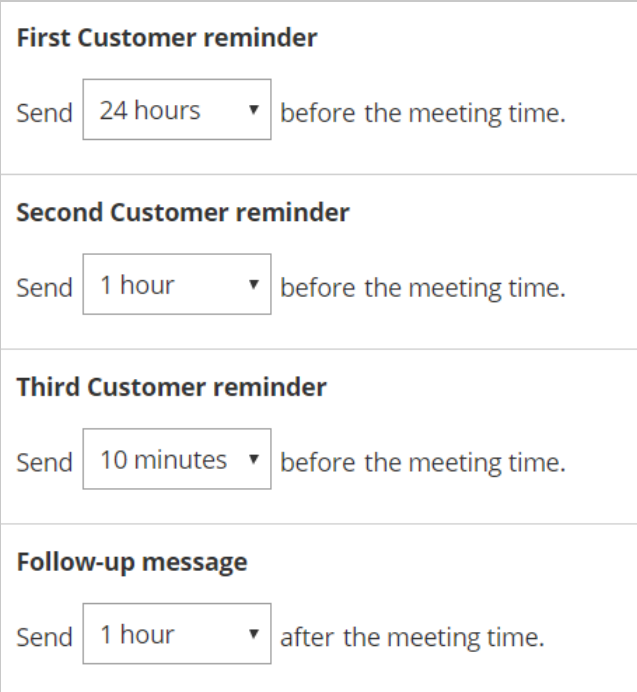


Figure 10: Timing option menus

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 [Classic]

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.

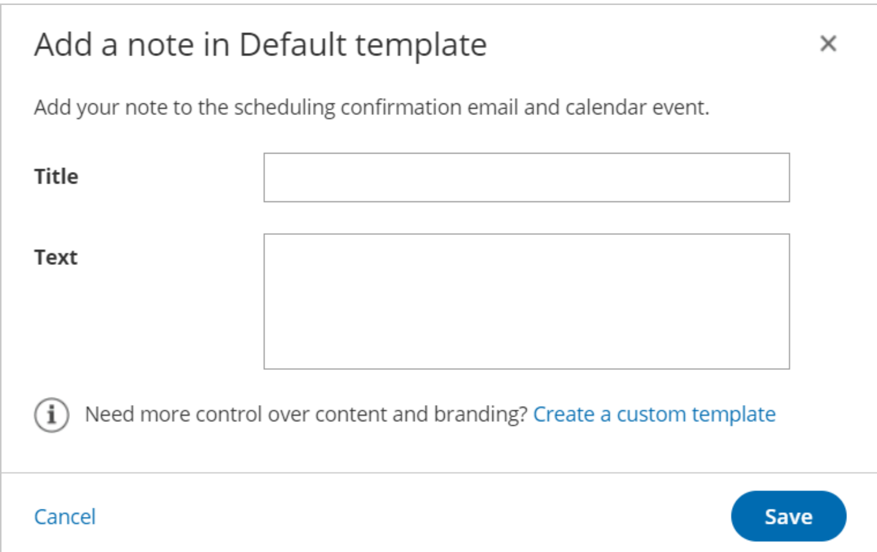


   Figure 1: Add a note to a Default template

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 calendar event options [Classic]

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).

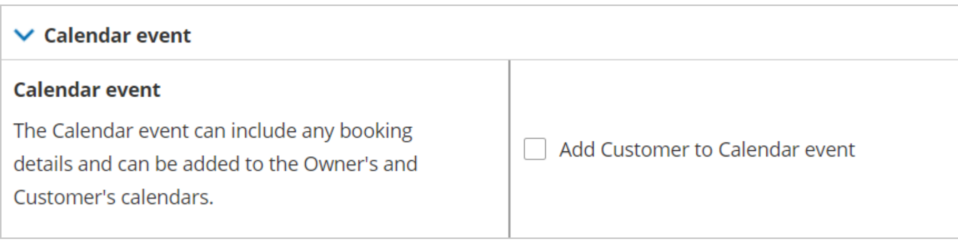


Figure 1: Calendar event option in the Customer notifications section

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.

Customer notification scenarios [Classic]

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

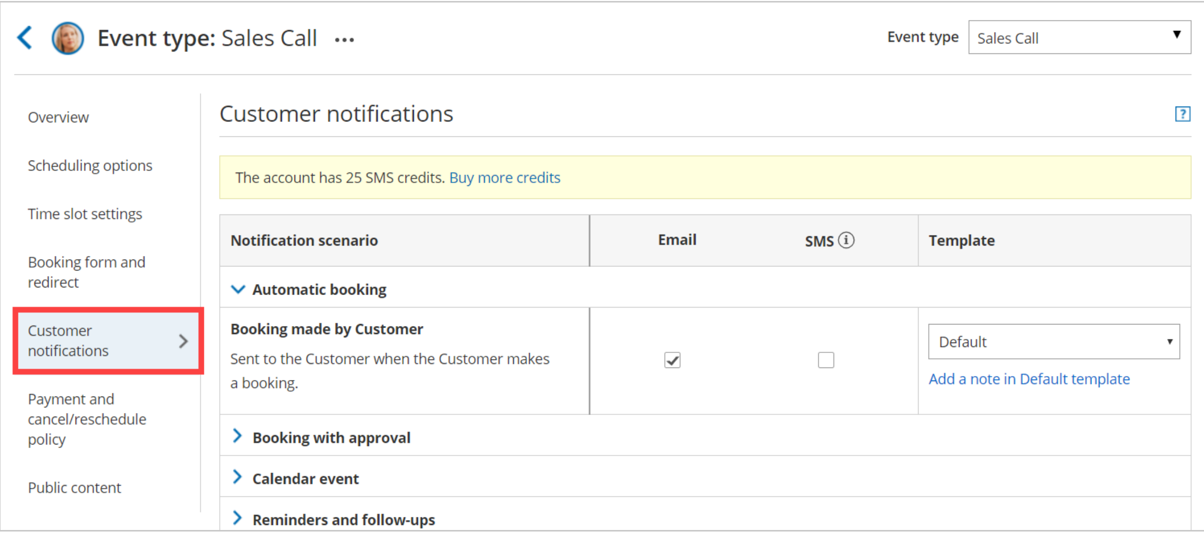


Figure 1: The Customer notifications section on an Event type

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.

Introduction to User notifications [Classic]

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**.

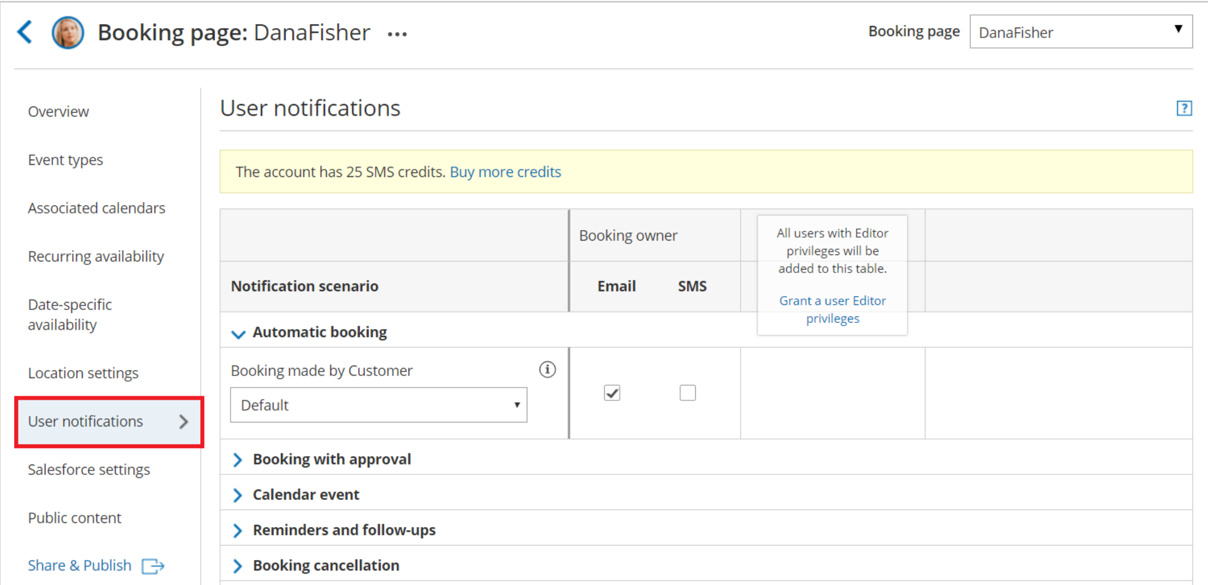


Figure 1: User notifications section

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).

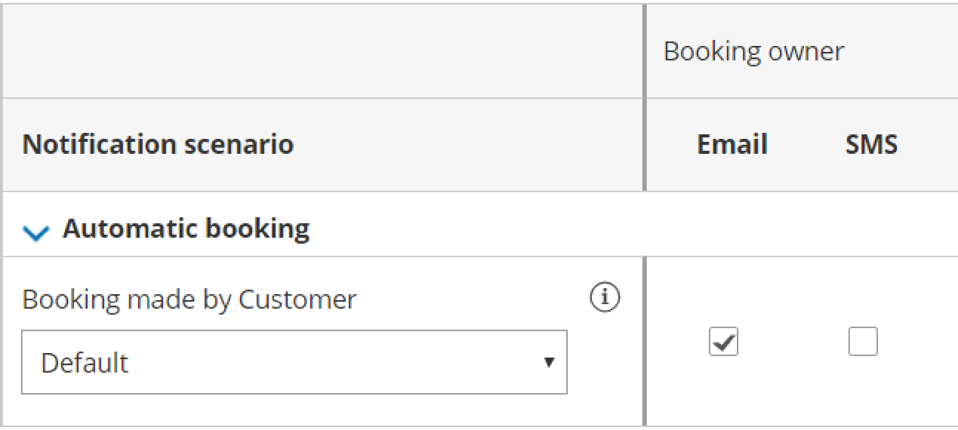


Figure 2: Automatic booking scenario

The exception is the Calendar event scenario, which has no SMS notification option (Figure 4).

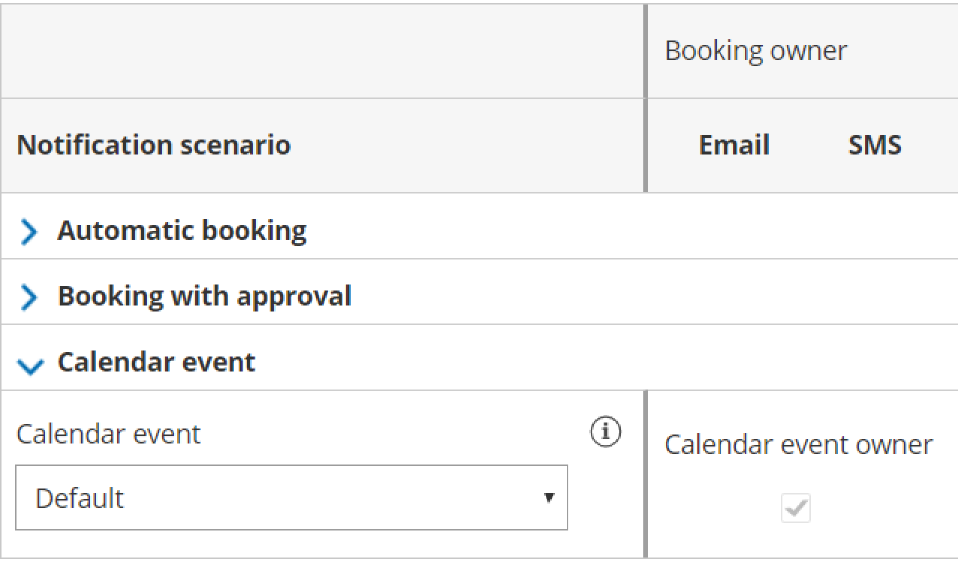


Figure 3: Calendar event scenario

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.

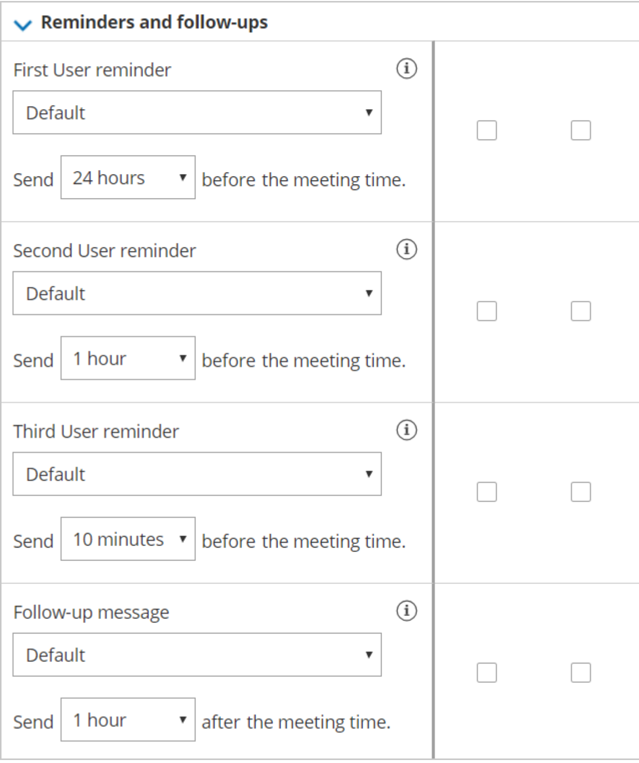


Figure 4: Reminder and Follow-up message scenarios

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).

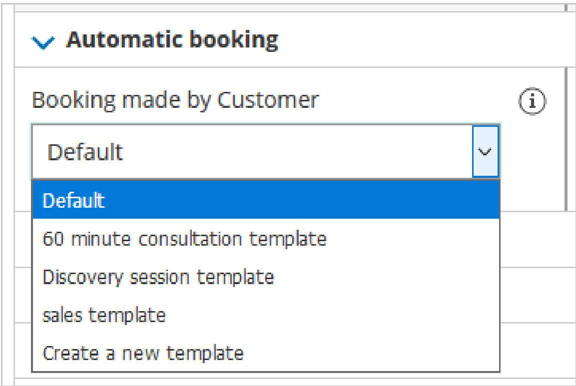


Figure 5: Notification templates drop-down

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).

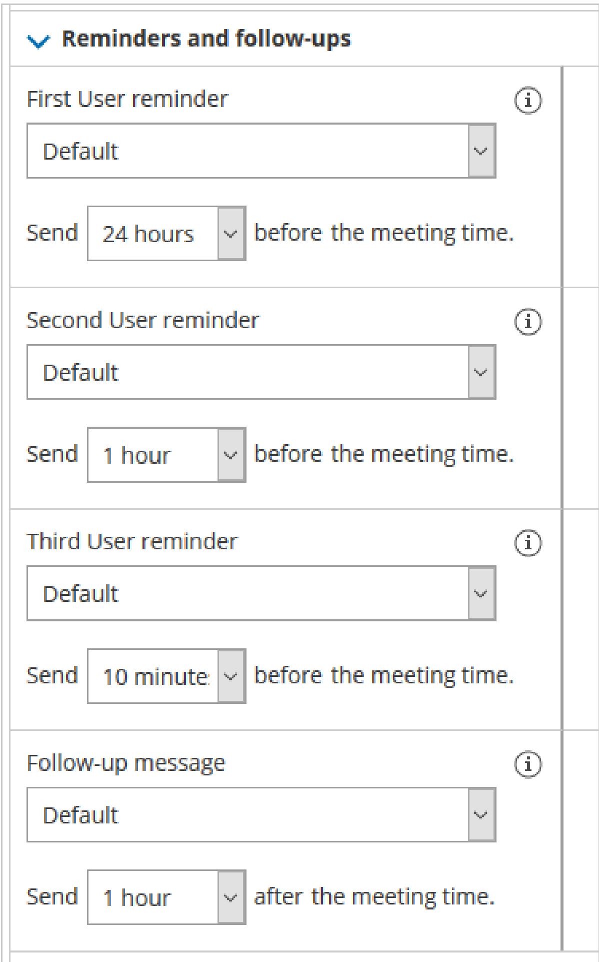


Figure 6: Timing option menus

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 [Classic]

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

Subscribing to Booking notifications [Classic]

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

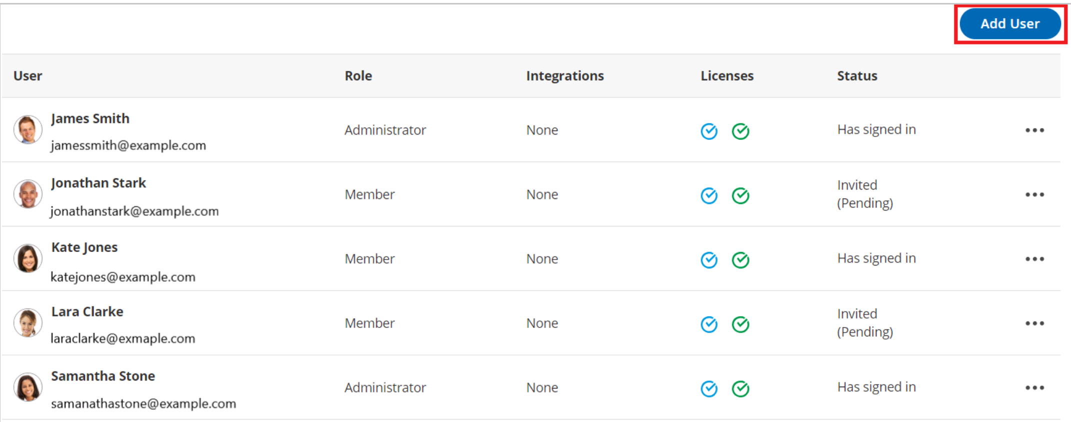


Figure 1: Users lobby

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.

User notification scenarios [Classic]

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.

Opting in and out of SMS Notifications [Classic]

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

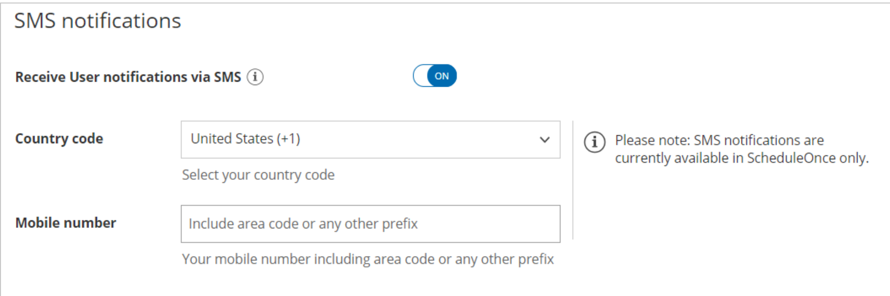


Figure 1: SMS notifications section

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

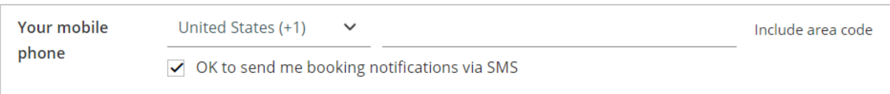


Figure 2: Booking form

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.

Sending SMS notifications to Customers [Classic]

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.

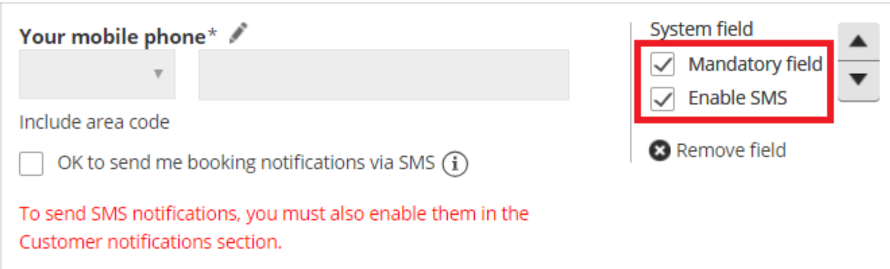


Figure 1: Enable SMS in the Booking forms editor

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).

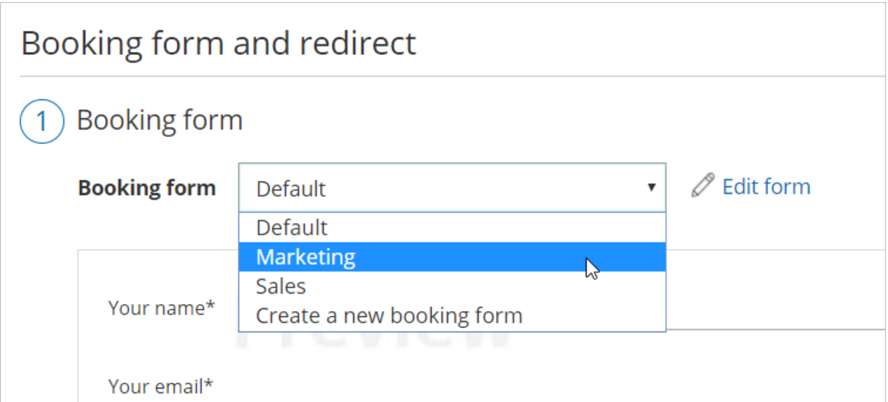


Figure 3: Select a Booking form

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.

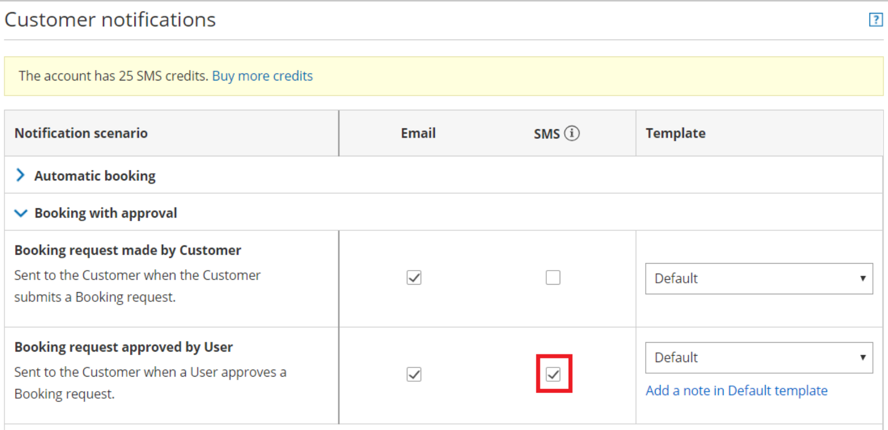


Figure 3: Customer notification scenarios

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 [Classic]

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).

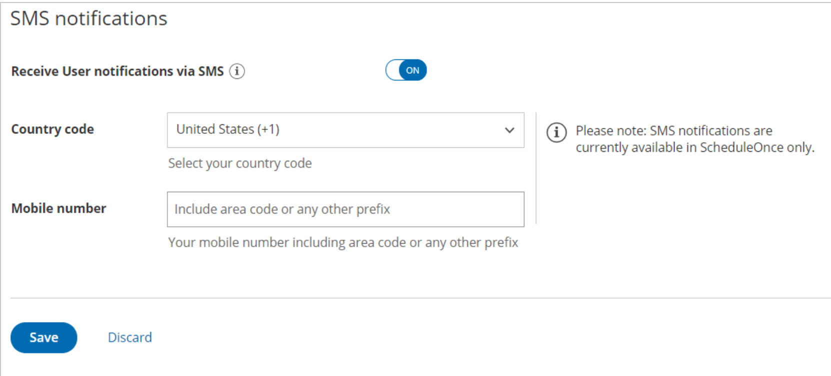


Figure 1: SMS Notifications

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.

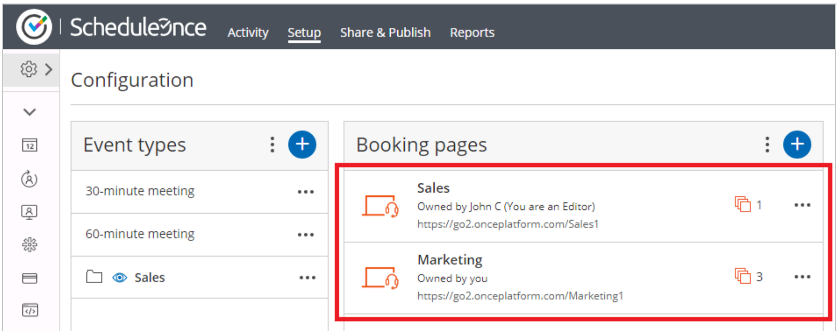


Figure 2: An Admin's setup page

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).

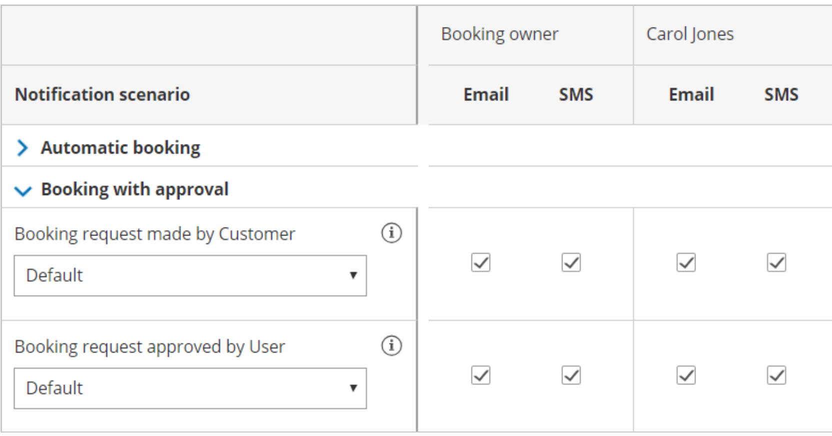


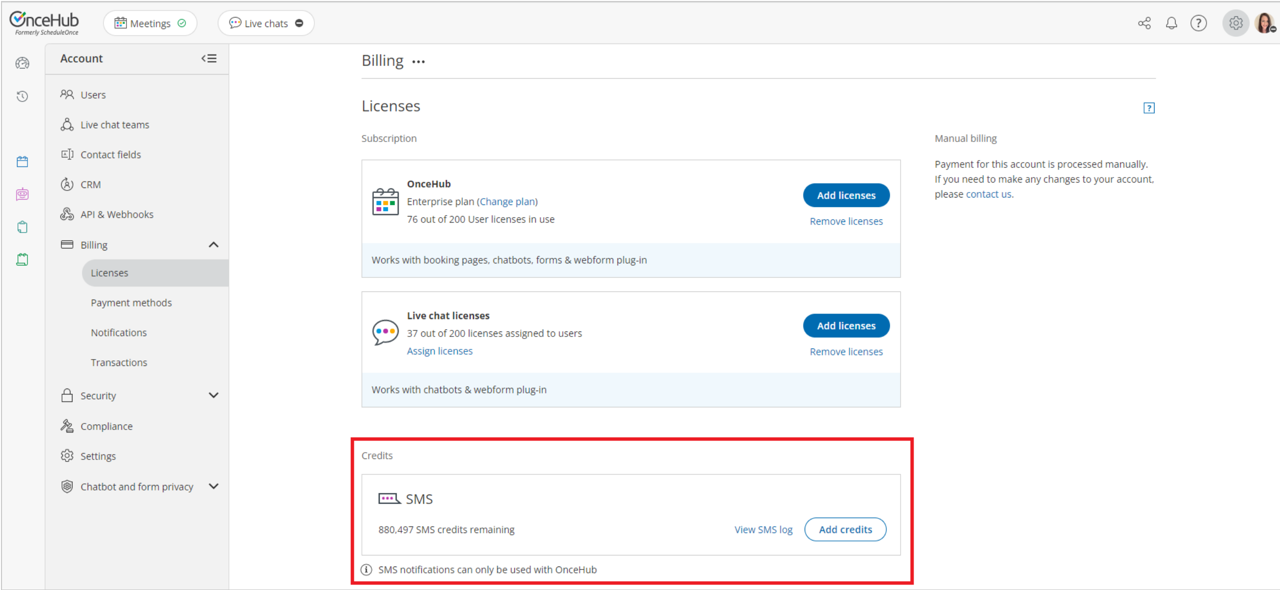
Figure 3: Selecting User notifications

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
Formerly ScheduleOnce
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

Introduction to categories [Classic]

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 [Classic]

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.

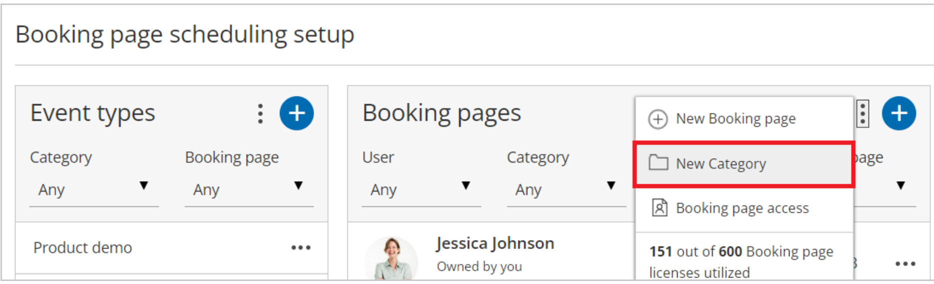


Figure 1: Booking page scheduling setup

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

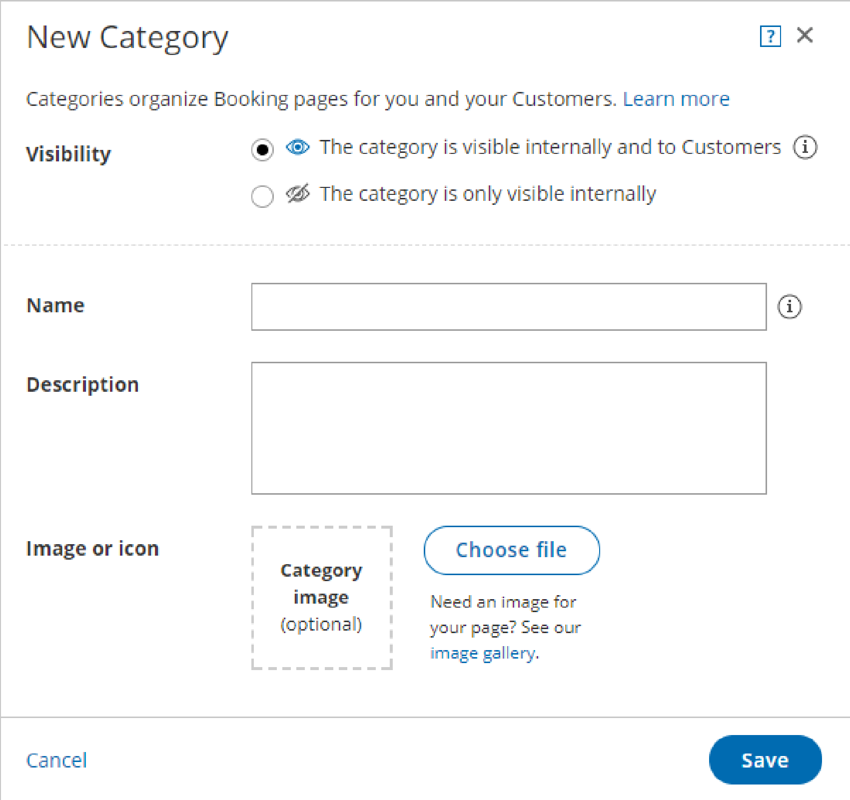


Figure 2: New Category pop-up

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.

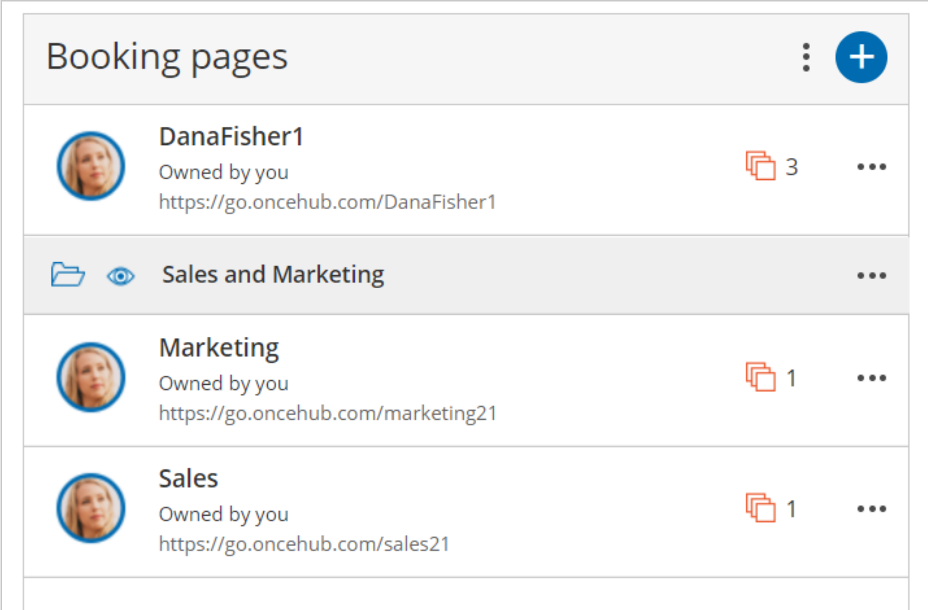


Figure 3: Drag and drop Booking pages into a category

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.

Categorized items in Master pages [Classic]

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."

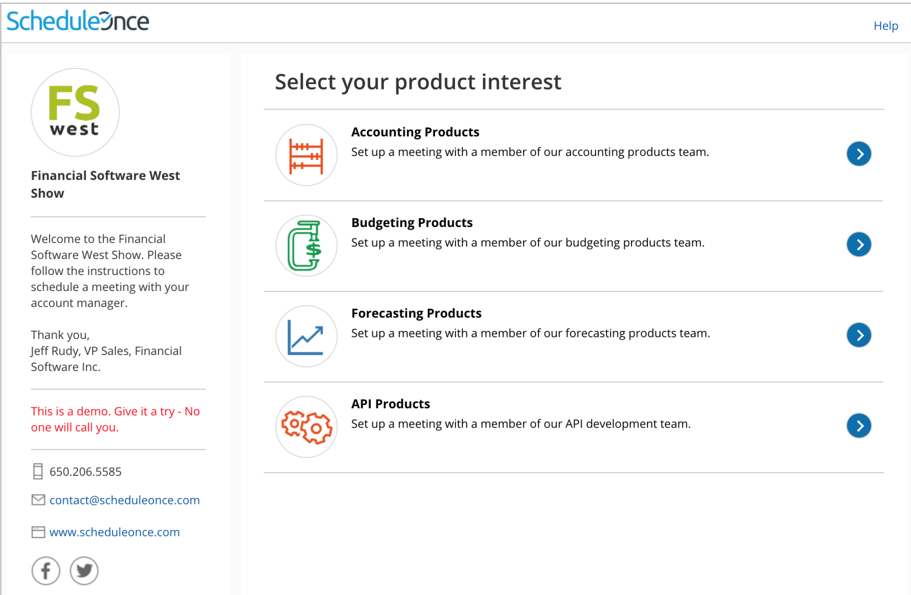


Figure 1: Category selection step

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.

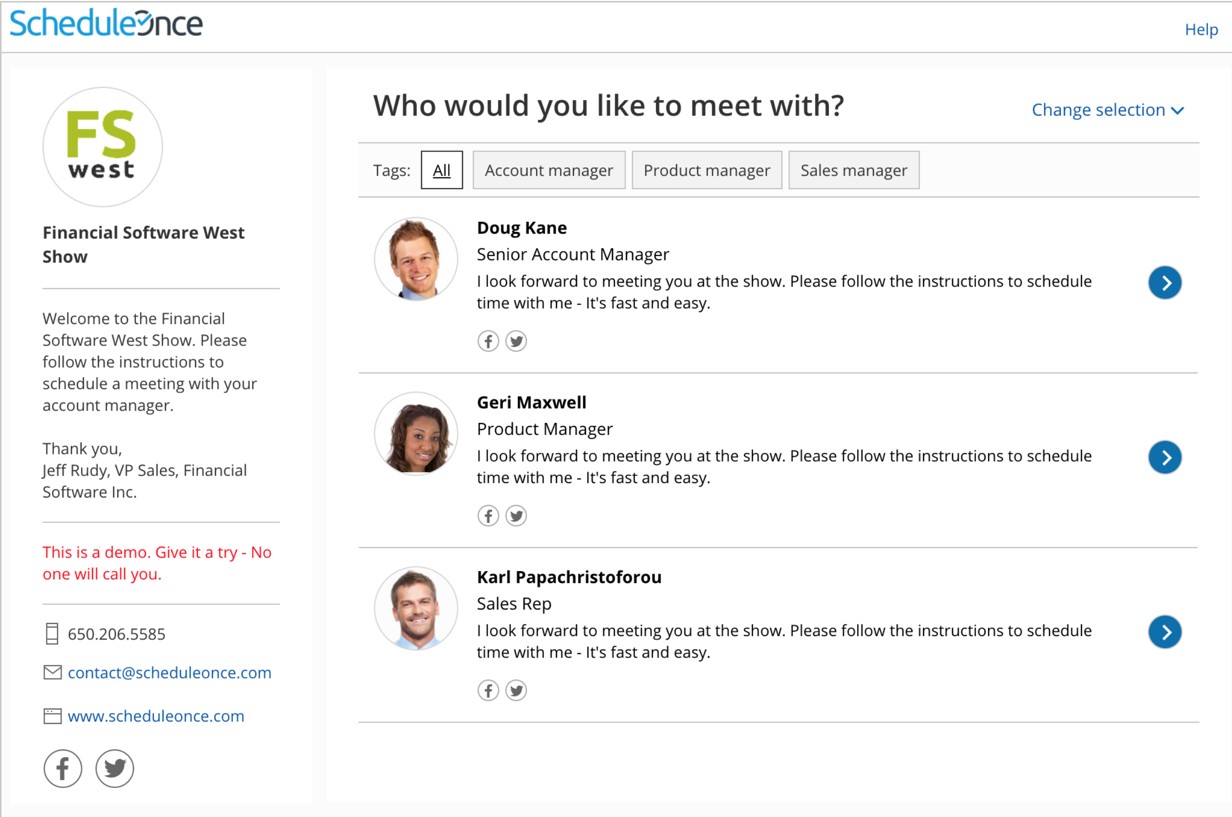


Figure 2: Booking page selection step

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.

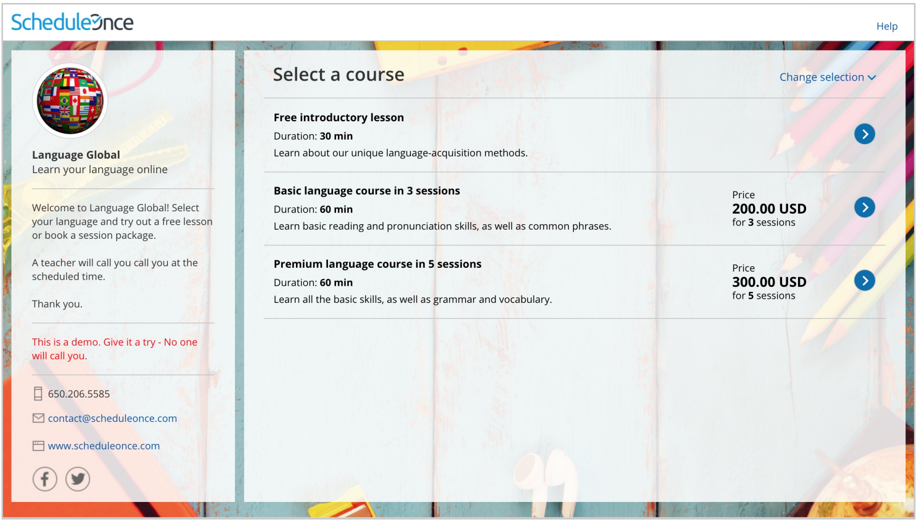


Figure 4: Event type selection step

> **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.

Categorized Event types in Booking pages [Classic]

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.

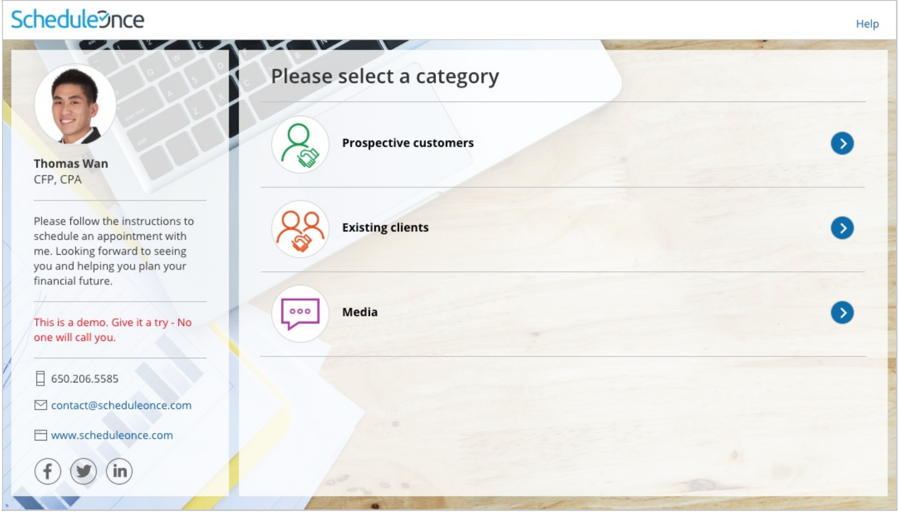


Figure 1: Category selection step

> **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.

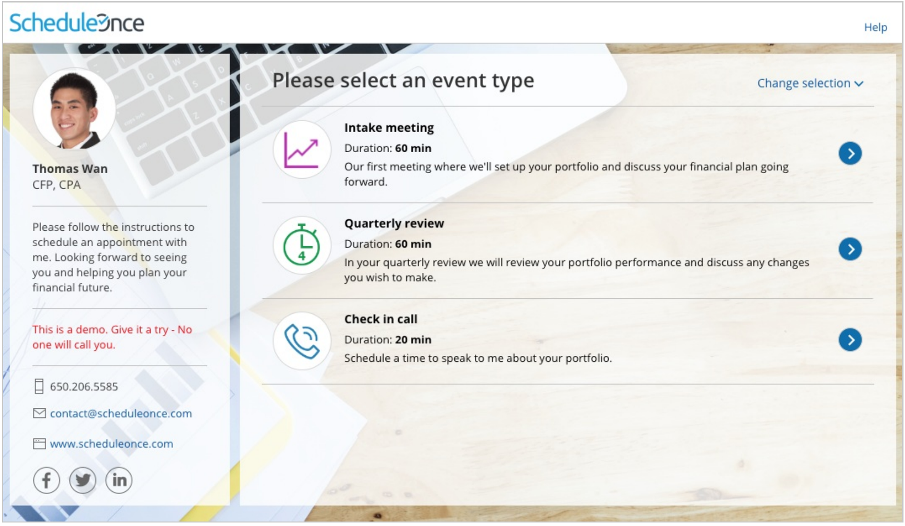


Figure 2: Event type selection

> **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 [Classic]

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 [Classic]

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.

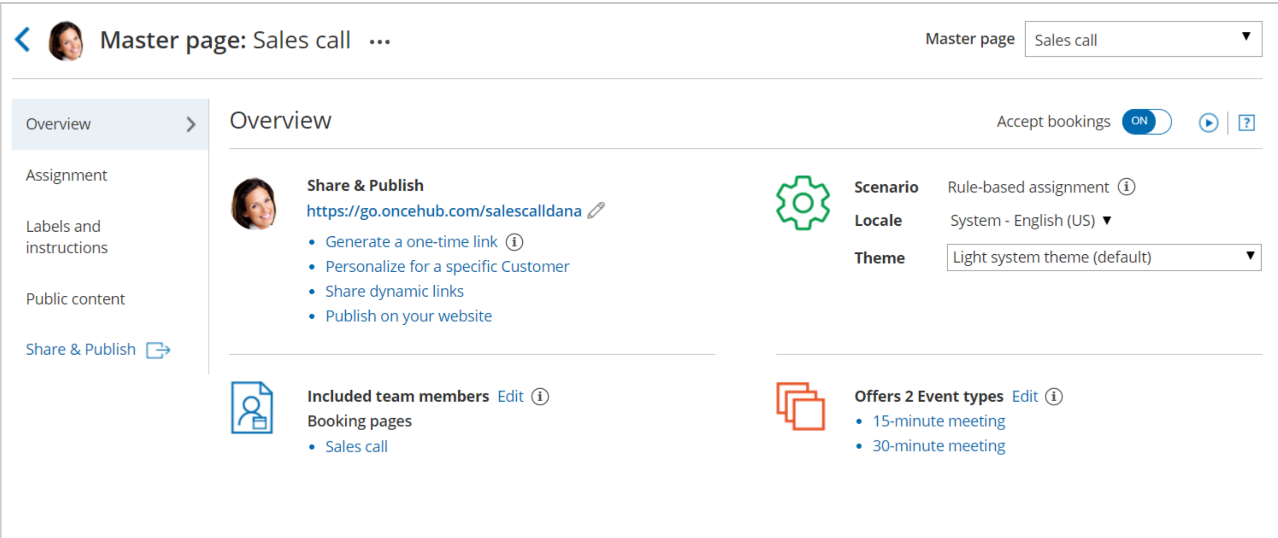


Figure 1: Master page Overview

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).

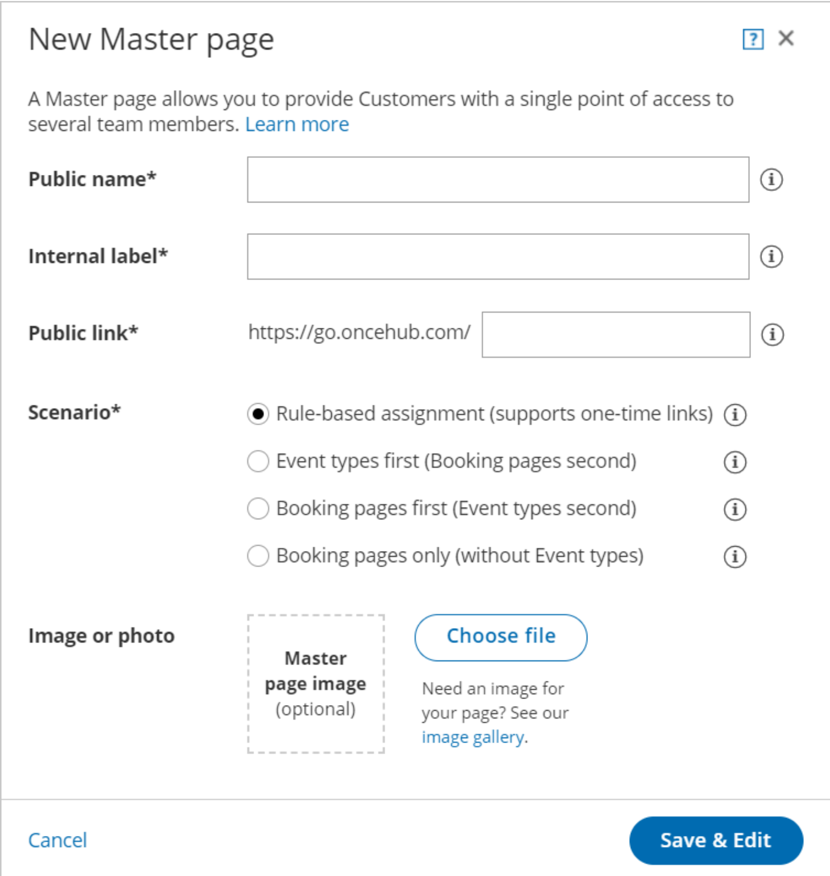


Figure 2: New Master page pop-up

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 pages: Overview [Classic]

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.

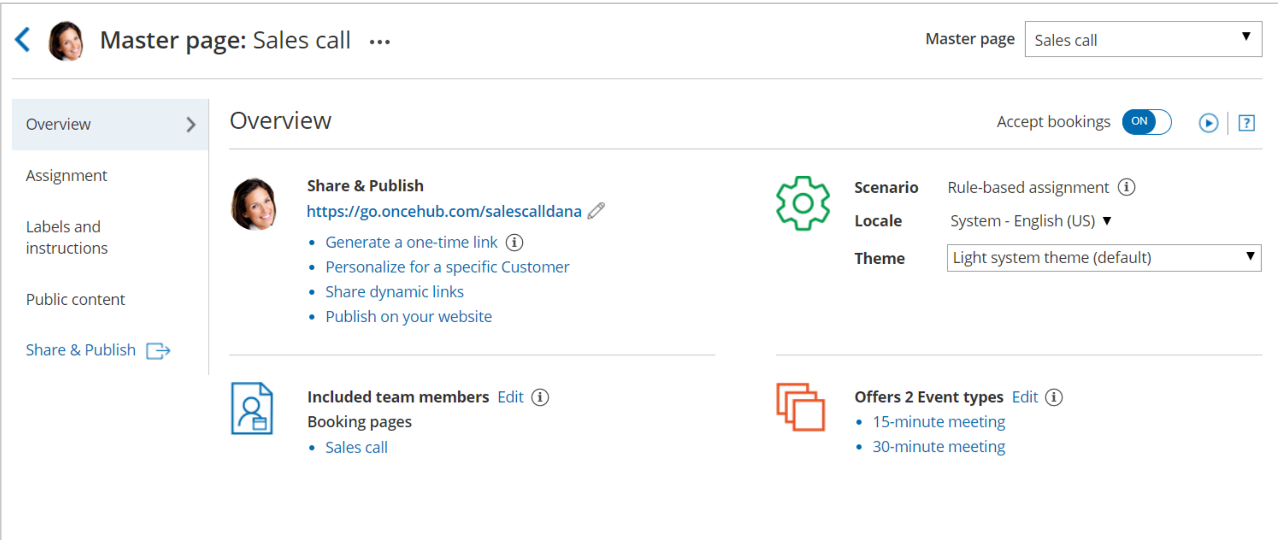


Figure 1: Master page Overview section

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

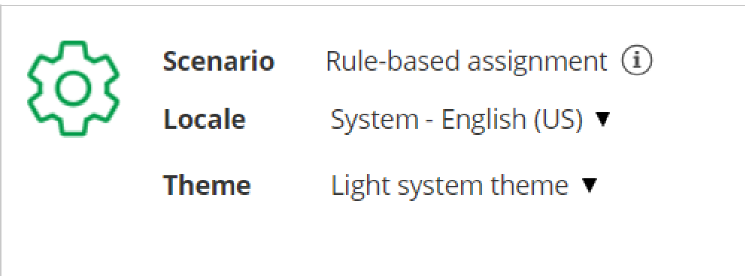


Figure 2: Main settings section

- **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

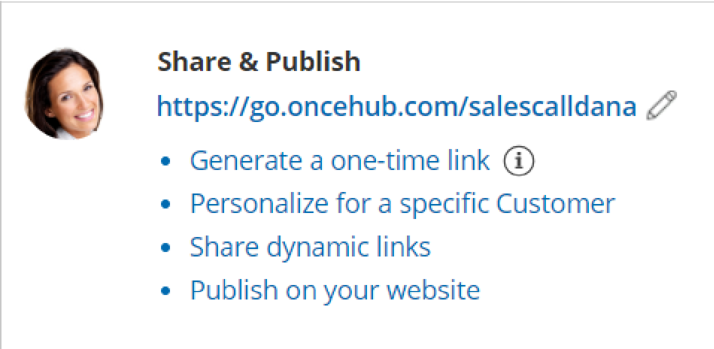


Figure 3: Share & Publish section

- **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

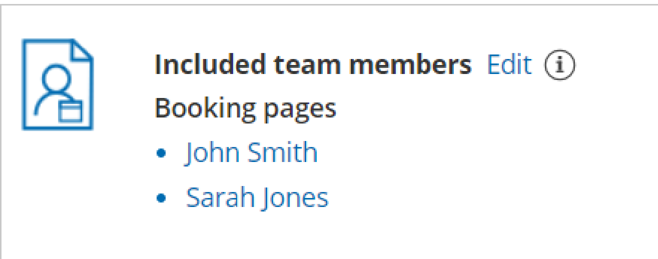


Figure 4: Included team members

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

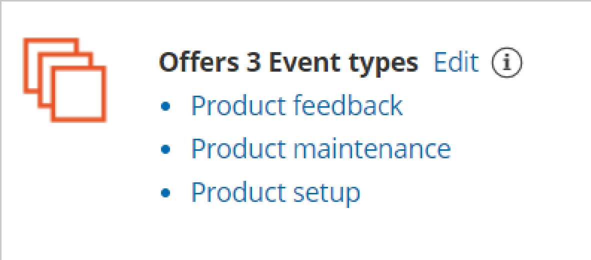


Figure 5: Event types offered by the Master page

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 pages: Event types and assignment [Classic]

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**.

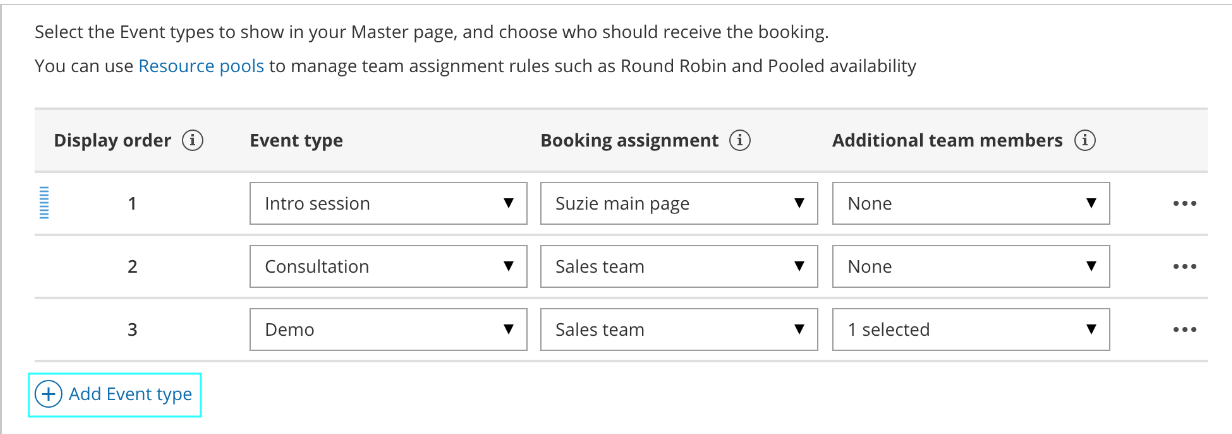


Figure 1: Add an Event-based rule

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).

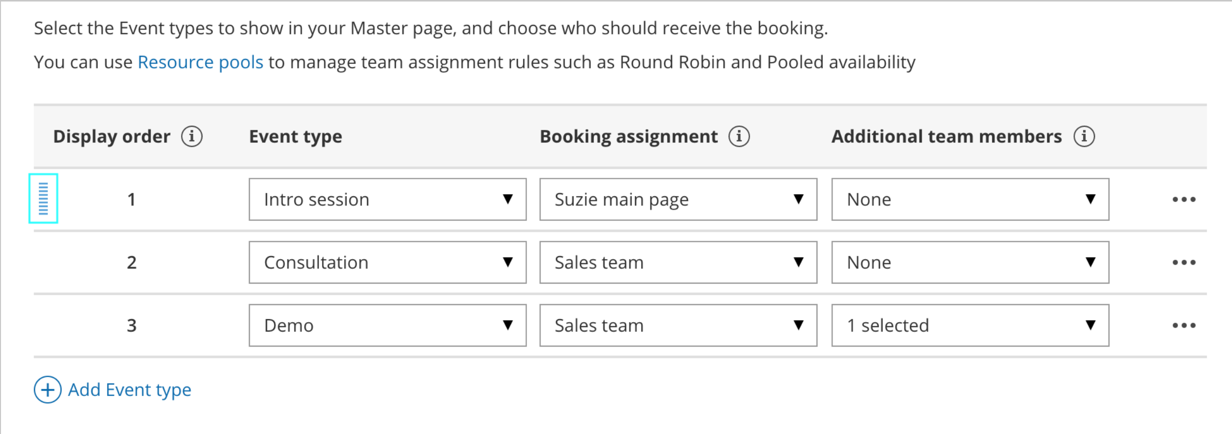


Figure 2: Click and drag a row to reorder

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.

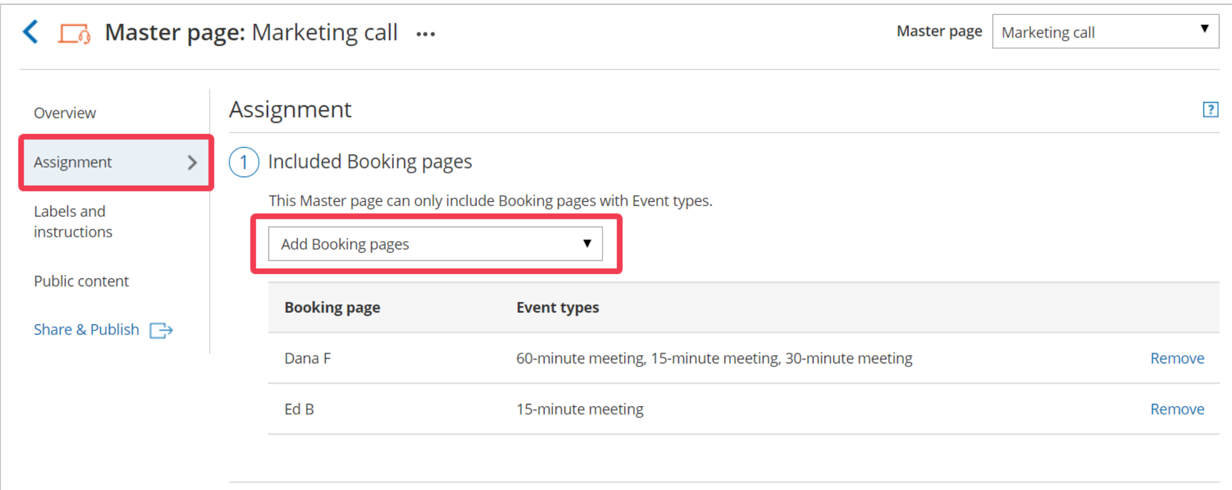


Figure 3: Adding Booking pages to your Master page

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.

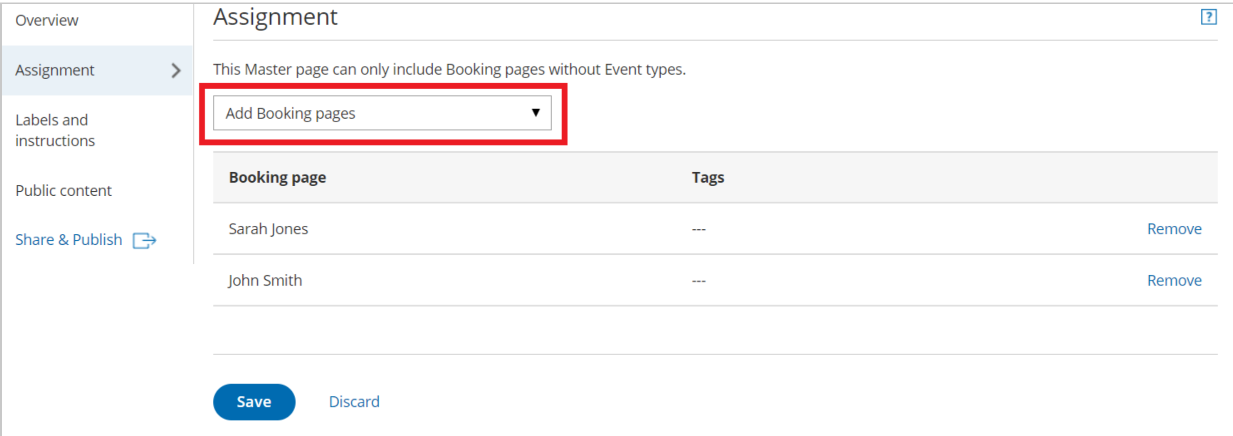


Figure 4: Adding Booking pages to your Master page

4. Click **Save**.

Master pages: Labels and instructions [Classic]

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).

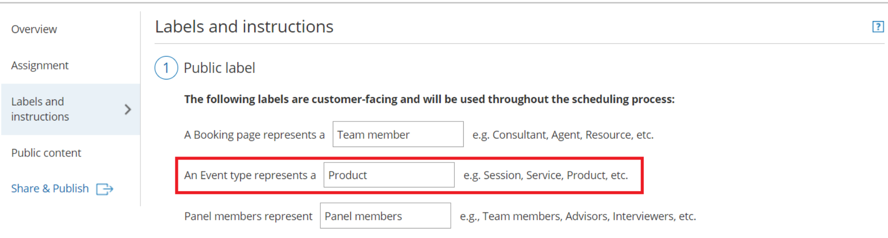


Figure 1: Adding a public label to an Event type

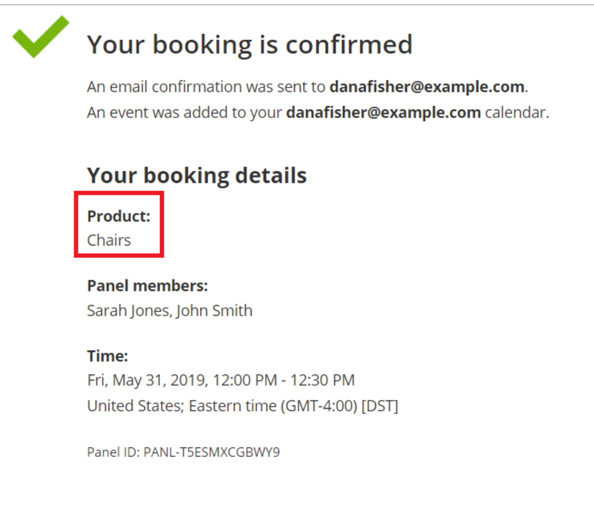


Figure 2: Booking confirmation page

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).

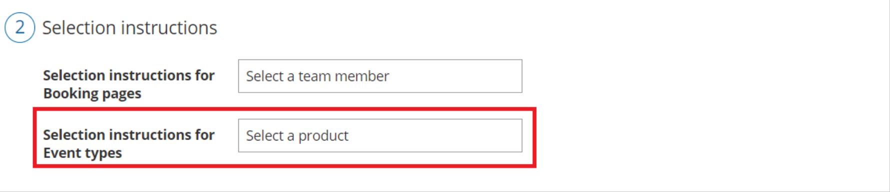


Figure 3: Selection instructions section

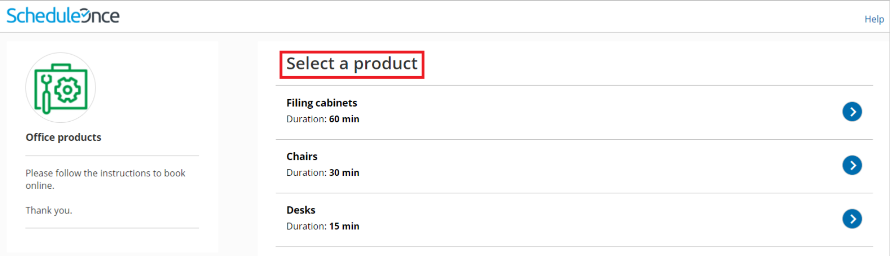


Figure 4: Event type selection

Master pages: Public content [Classic]

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).

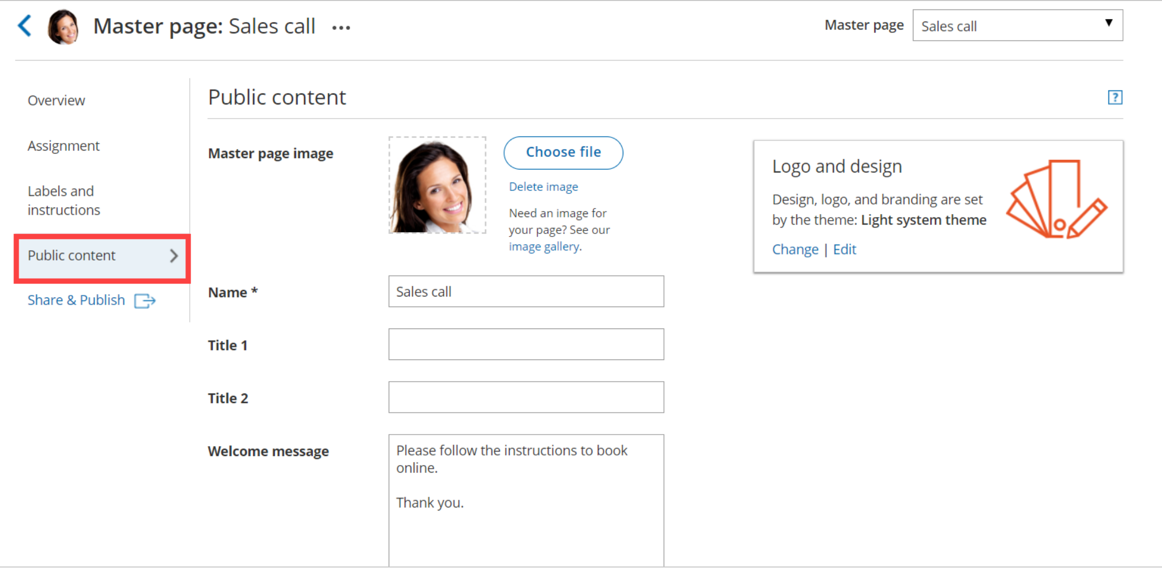


Figure 1: Master page Public content section

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:

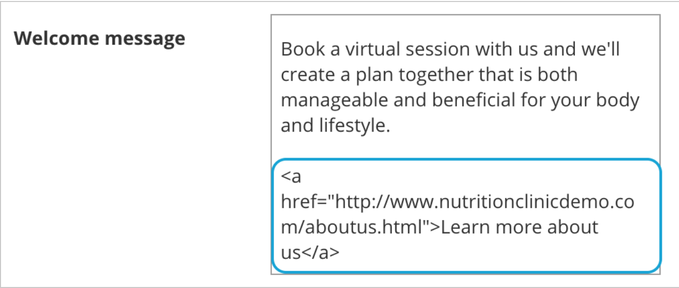


Figure 2: HTML link in the Event type description

> **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:

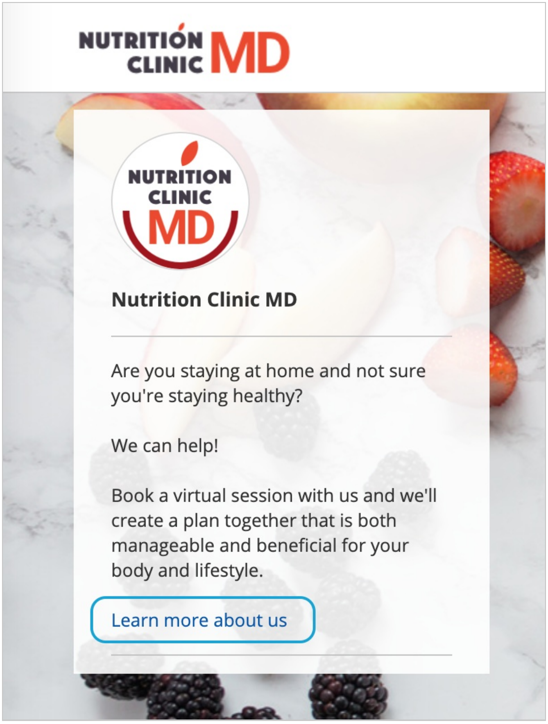


Figure 3: Event type description including HTML link

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.

Assignment with team or panel pages [Classic]

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).

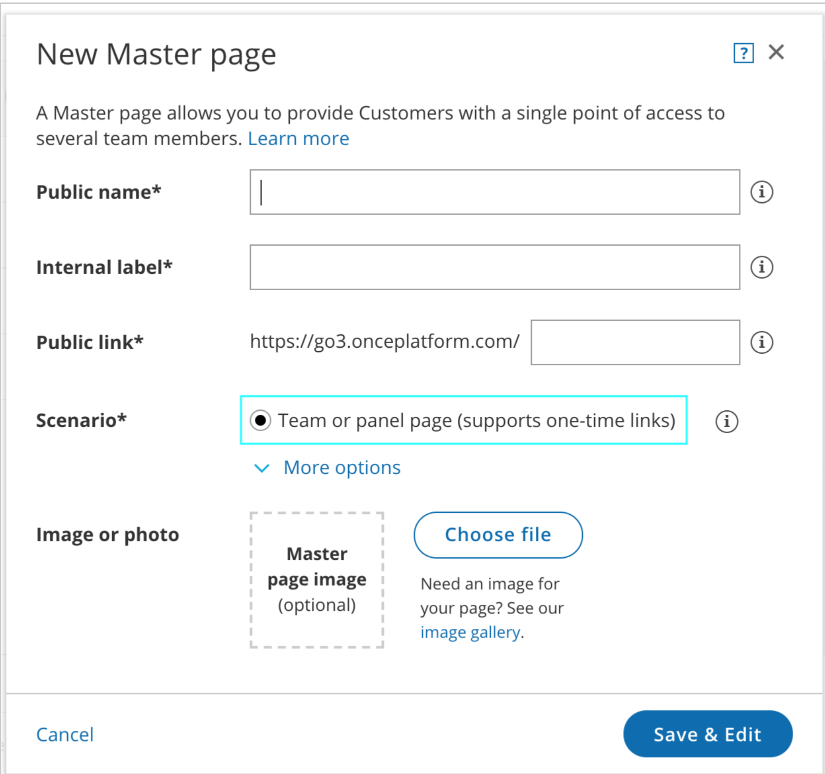


Figure 1: New Master page pop-up

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**.

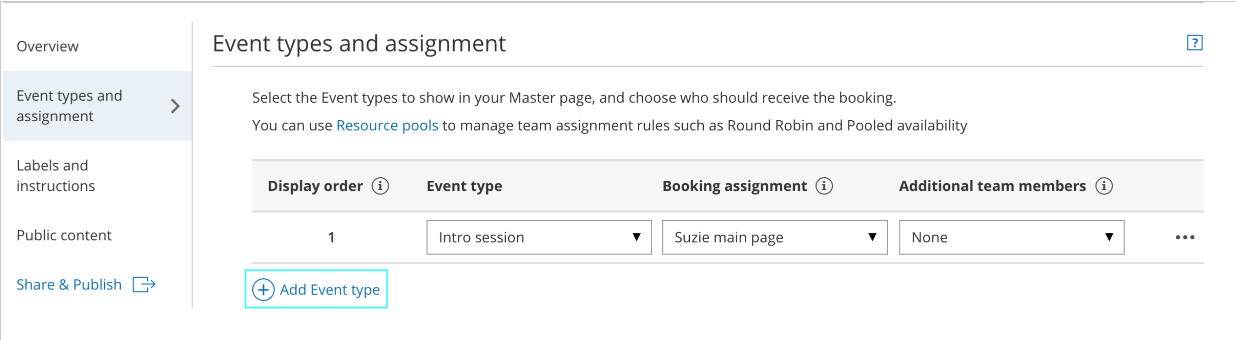


Figure 2: Add Event type to a Master page

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).

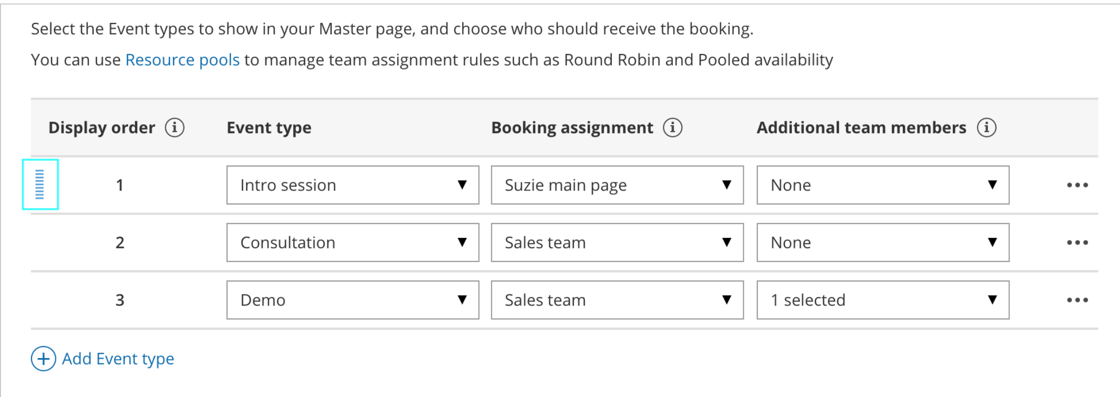


Figure 3: Click and drag a row to reorder

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

Conflicting settings when using team or panel pages [Classic]

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.

Event types first (Booking pages second) [Classic]

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

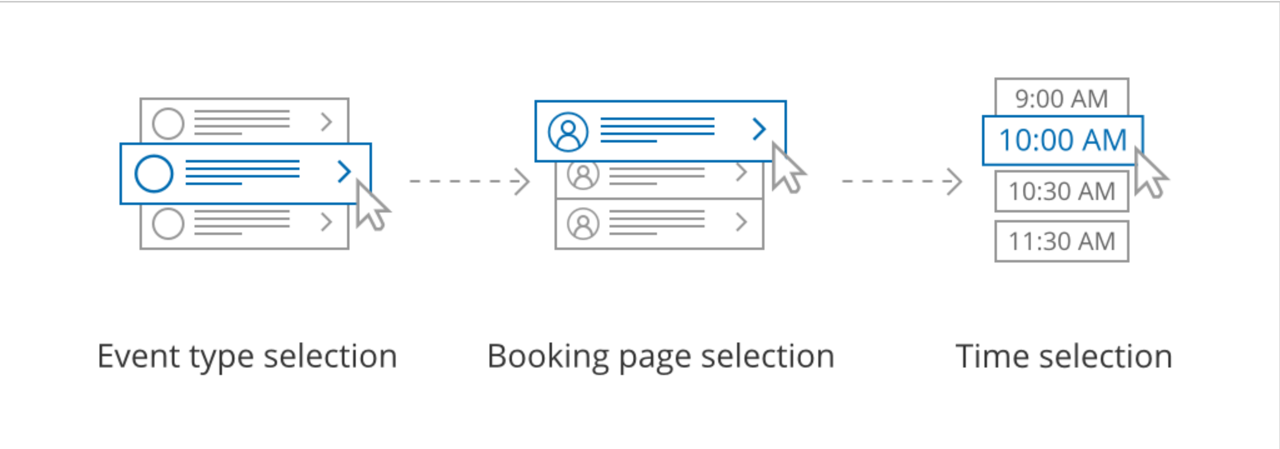


Figure 1: Customer flow for Event types first

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**.

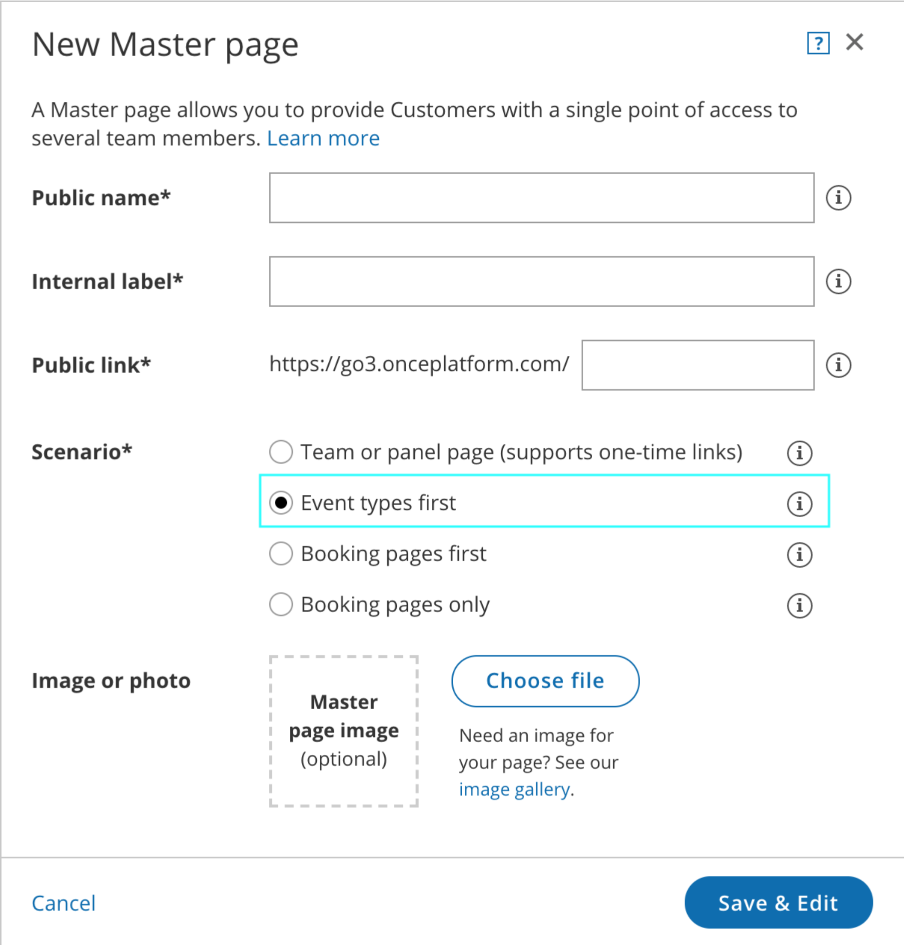


Figure 2: New Master page pop-up

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.

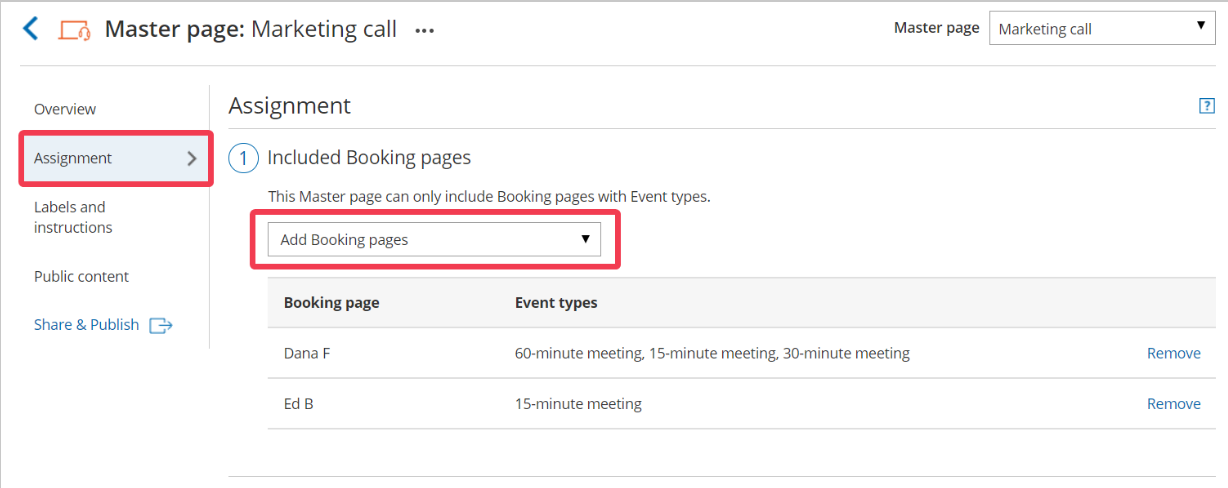


Figure 3: Add Booking pages to your Master page

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**.

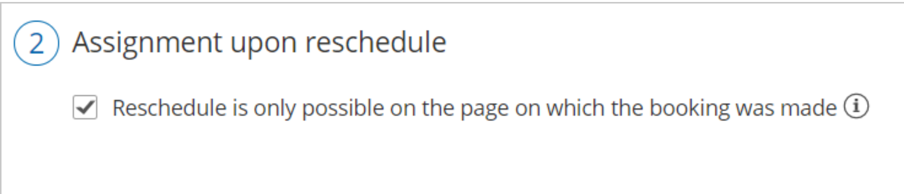


Figure 4: Assignment upon reschedule enabled

7. Click **Save**.

Booking pages first (Event types second) [Classic]

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

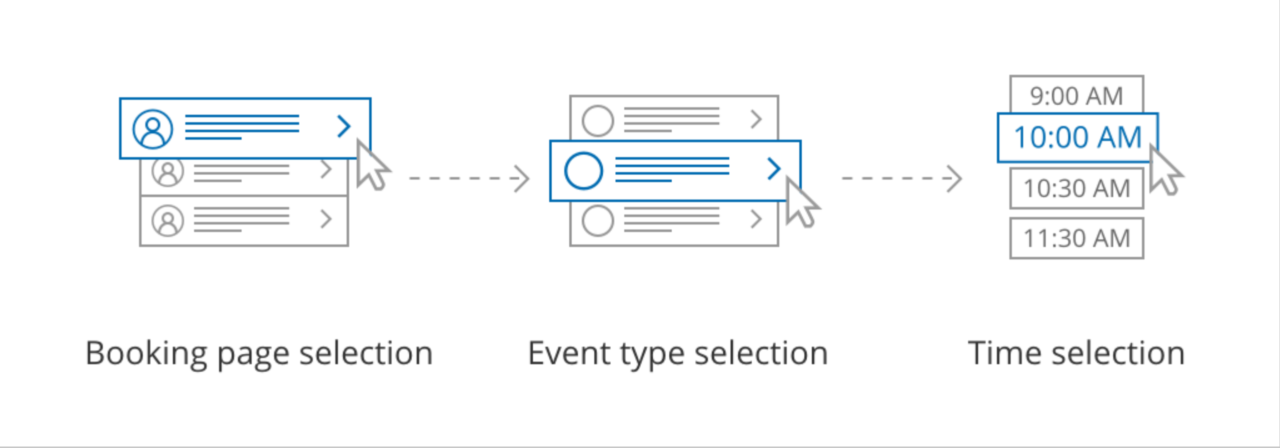


Figure 1: Customer flow for Booking pages first.

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)**.

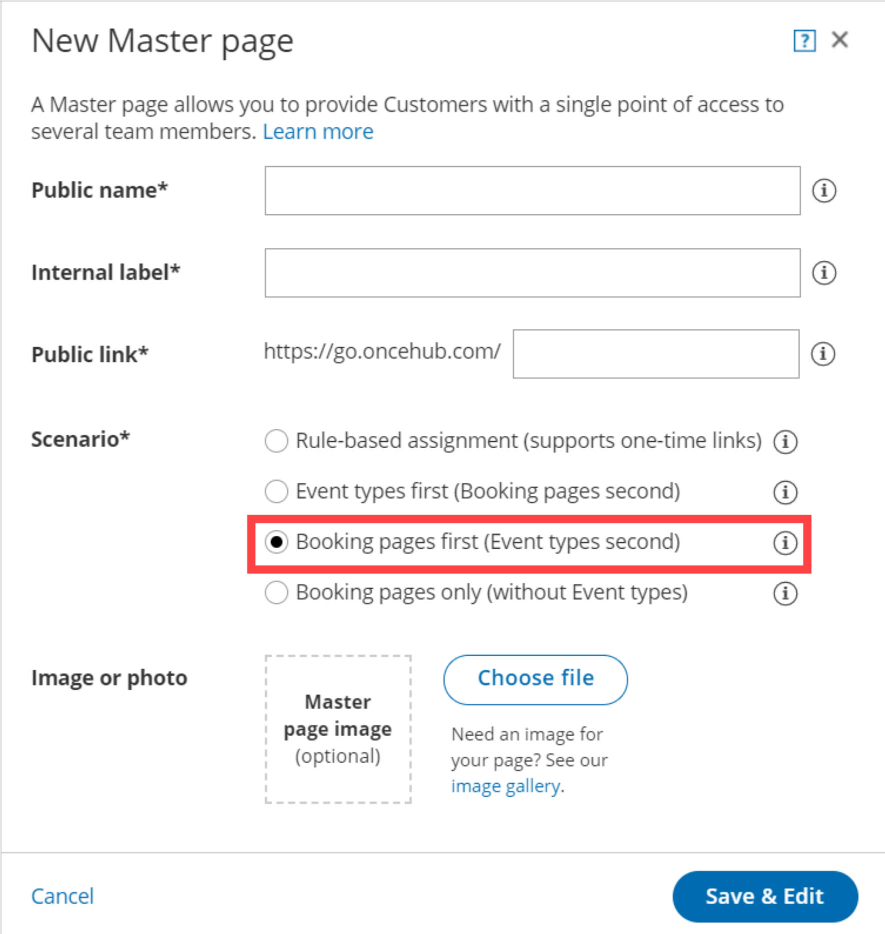


Figure 2: New Master page pop-up

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.

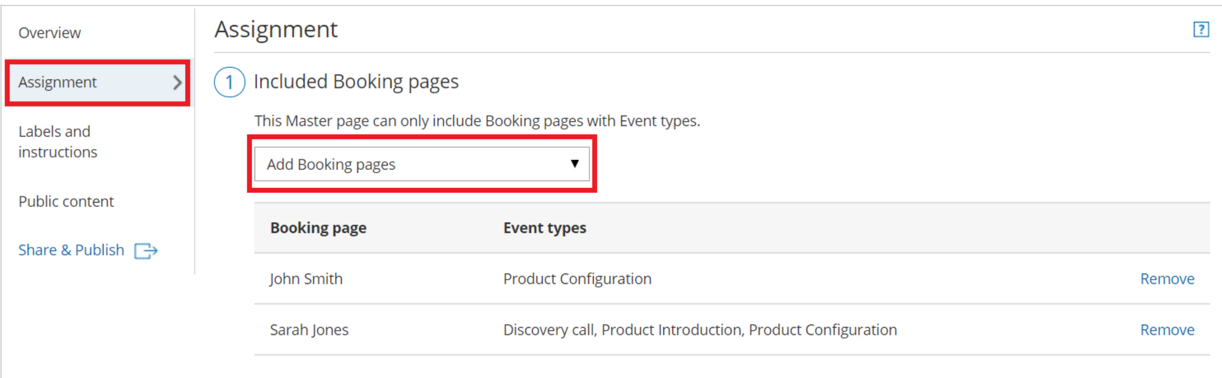


Figure 3: Add Booking pages

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**.

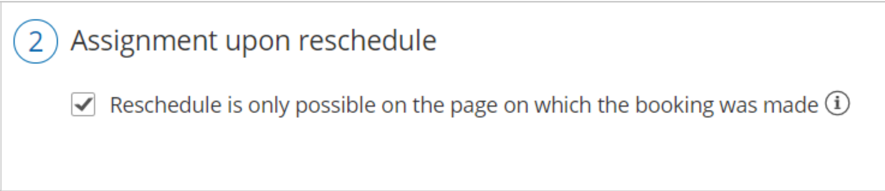


Figure 4: Assignment upon reschedule enabled

7. Click **Save**.

Booking pages only (without Event types) [Classic]

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

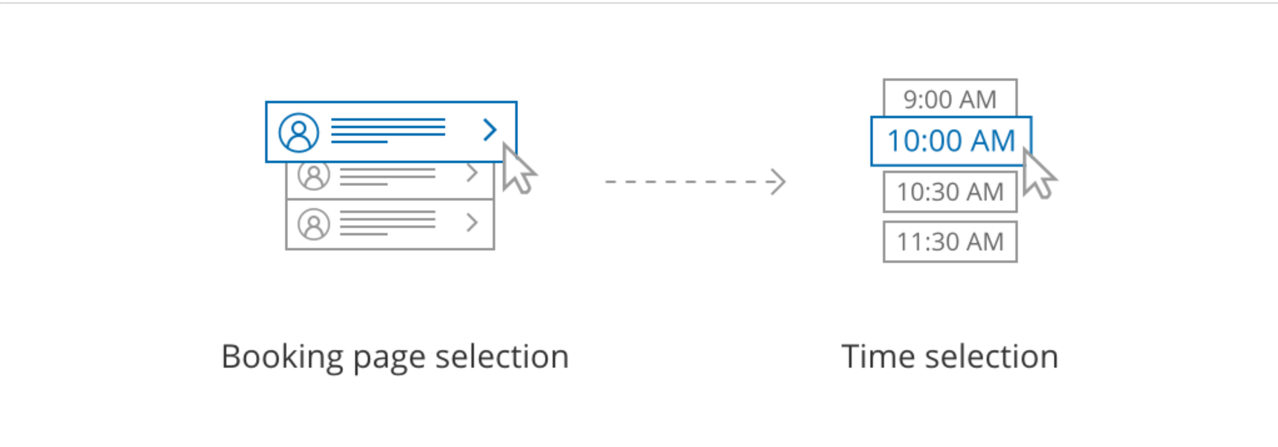


Figure 1: Customer flow for Booking pages only

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)**.

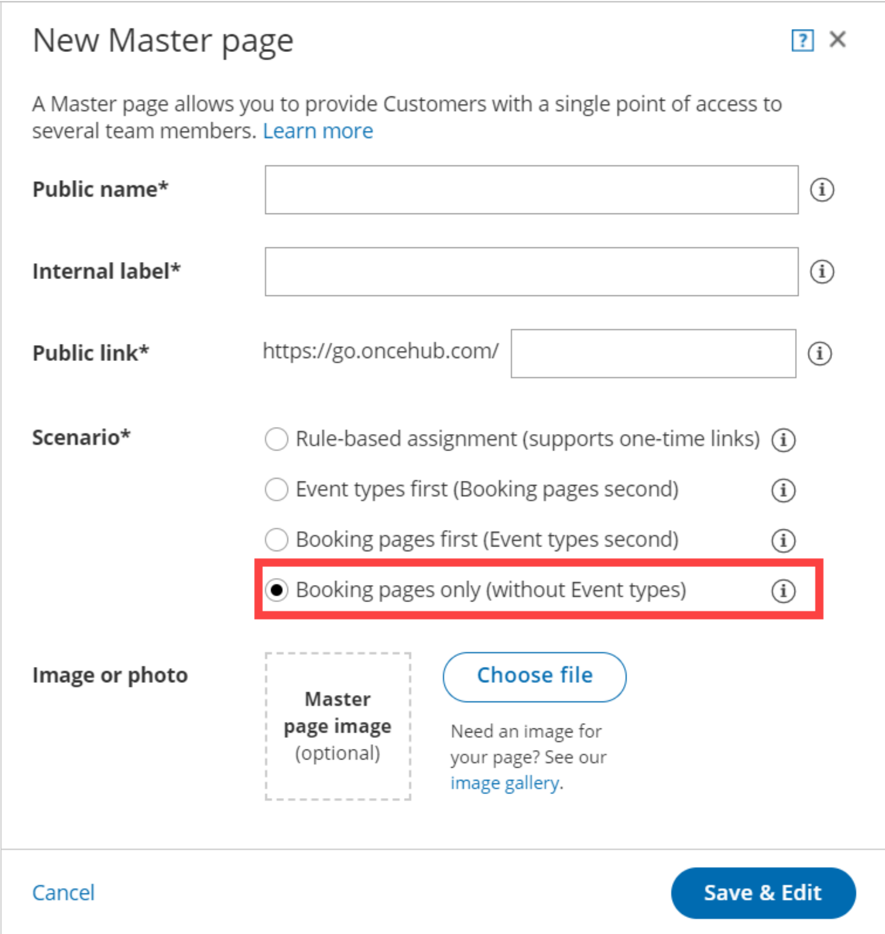


Figure 2: New Master page pop-up

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.

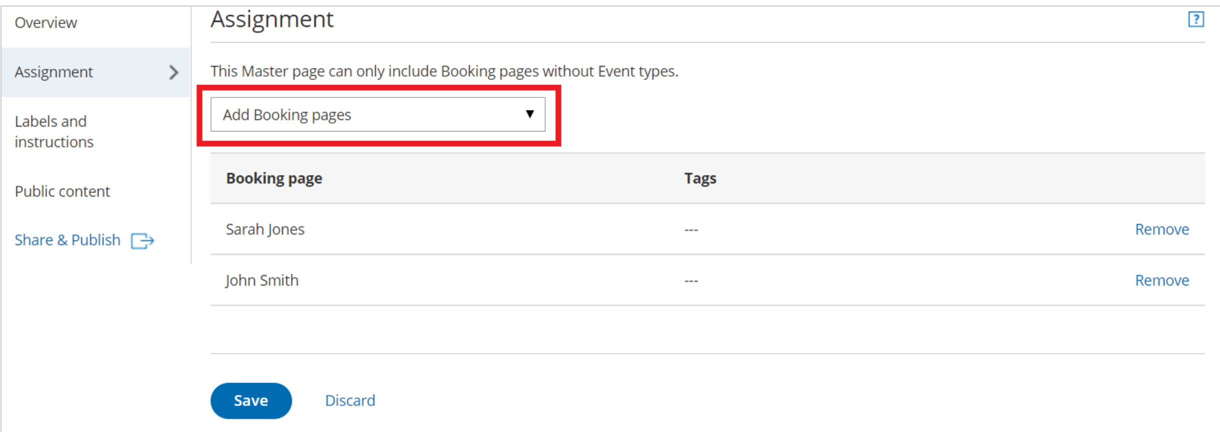


Figure 3: Add Booking pages to your Master page

6. Click **Save**.

Using Booking page tags in Master pages [Classic]

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.

Disabling your Master page [Classic]

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).

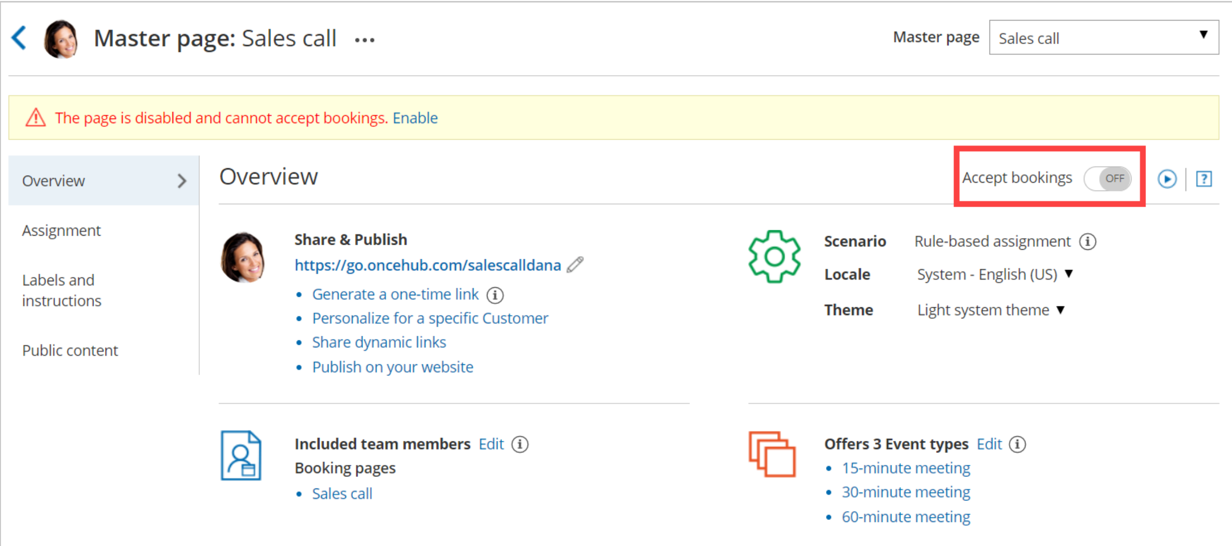


Figure 1: Accept bookings toggle set to OFF

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).

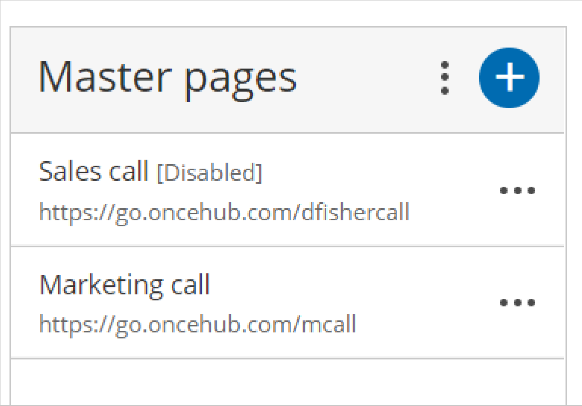


Figure 2: Master page list

- The following message is shown to Customers when they try to scheduling a booking using the Master page (Figure 3).

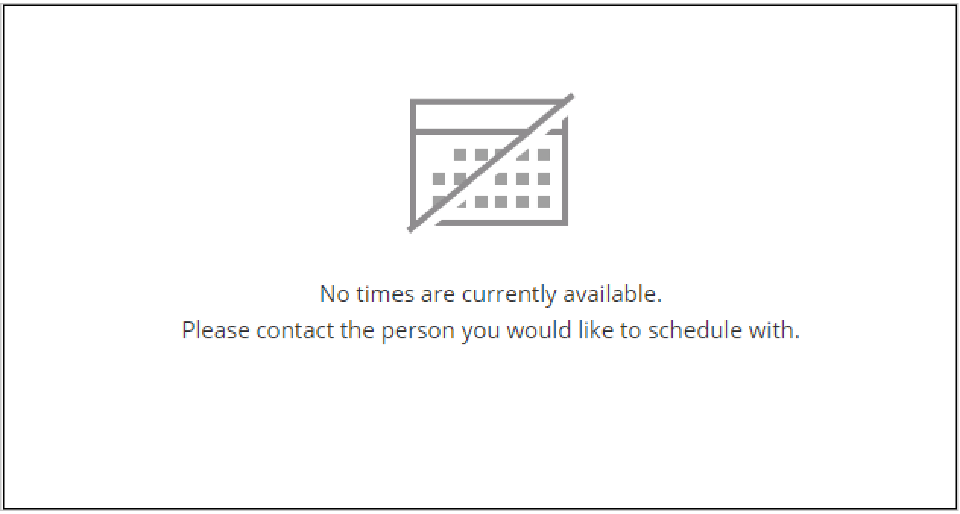


Figure 3: No times are currently available message

Master page scenarios [Classic]

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

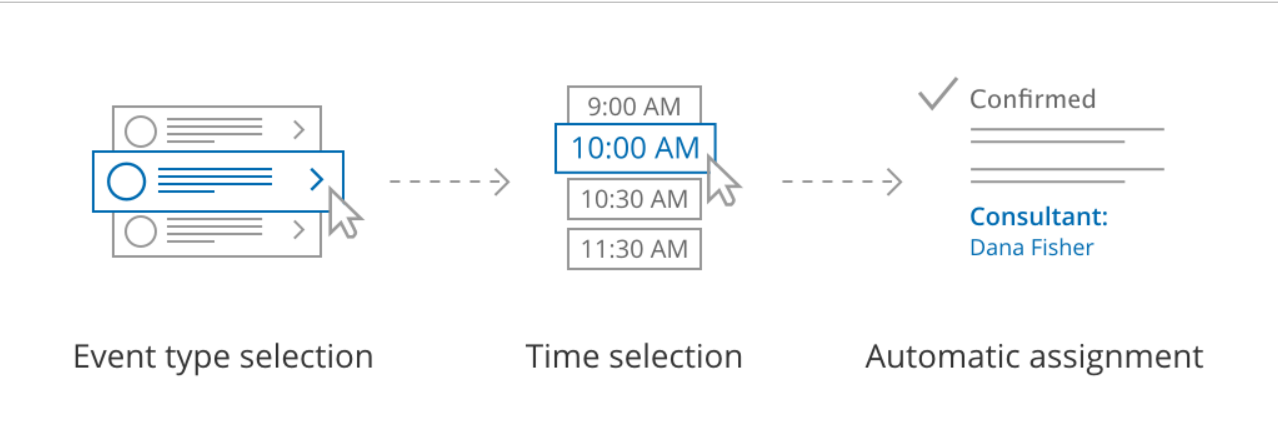


Figure 1: Rule-based assignment

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

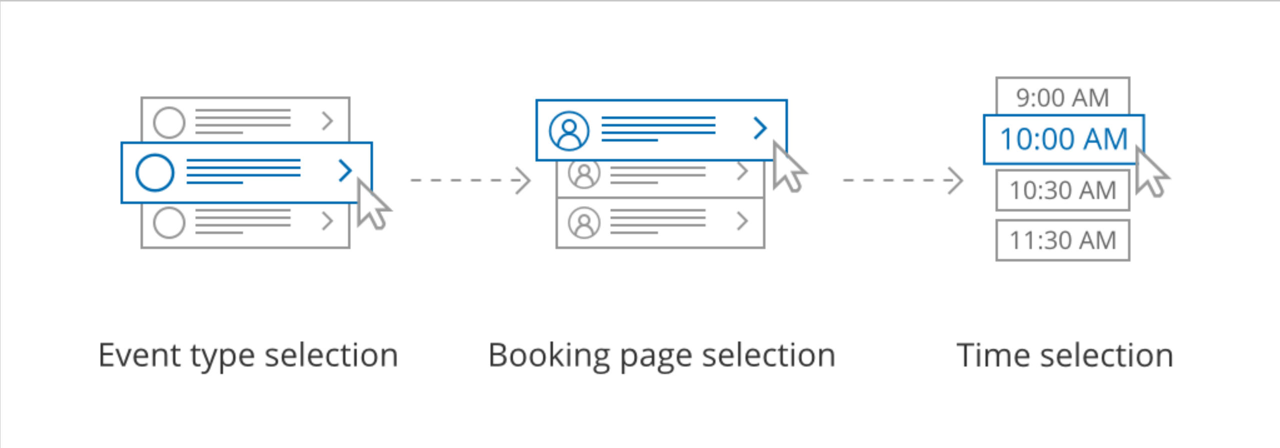


Figure 2: Event types first

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

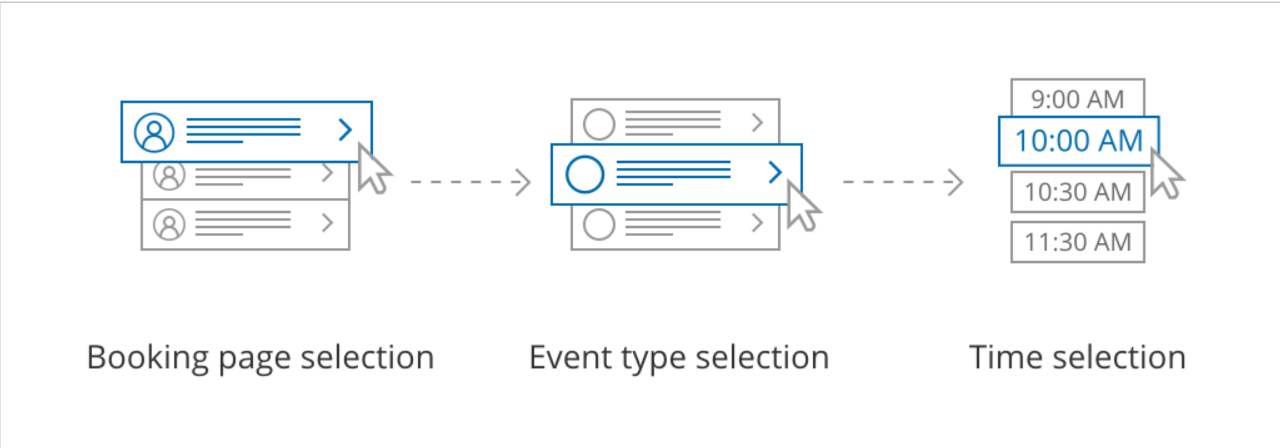


Figure 3: Booking pages first

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

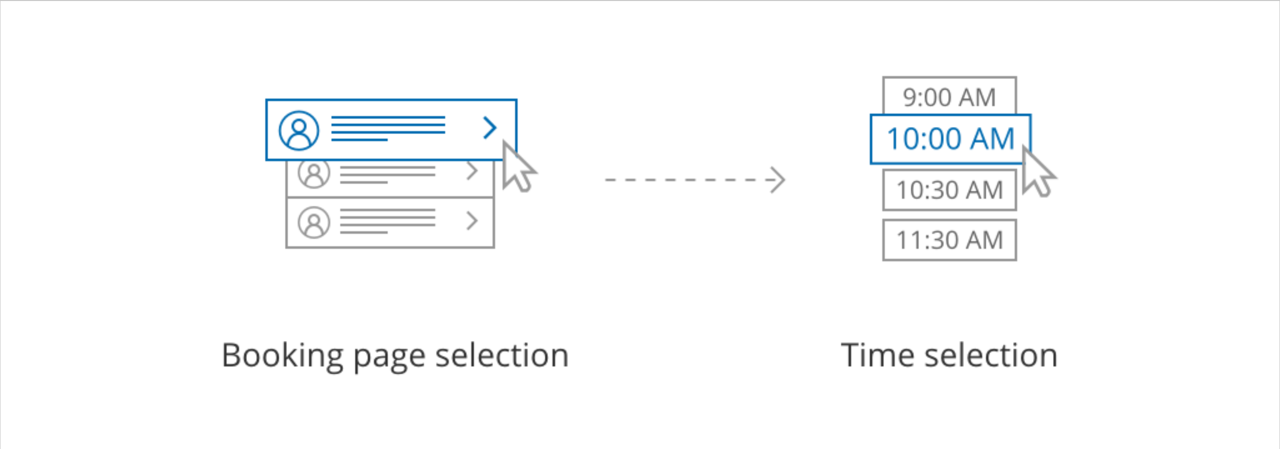


Figure 4: Booking pages only

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 [Classic]

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

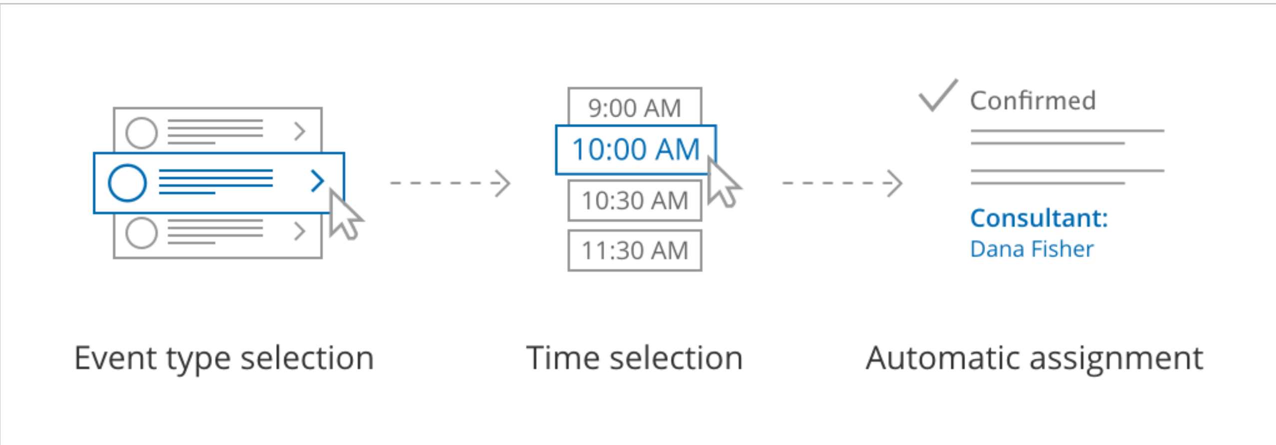


Figure 1: Team or panel pages

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.

Introduction to Resource pools [Classic]

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 [Classic]

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.

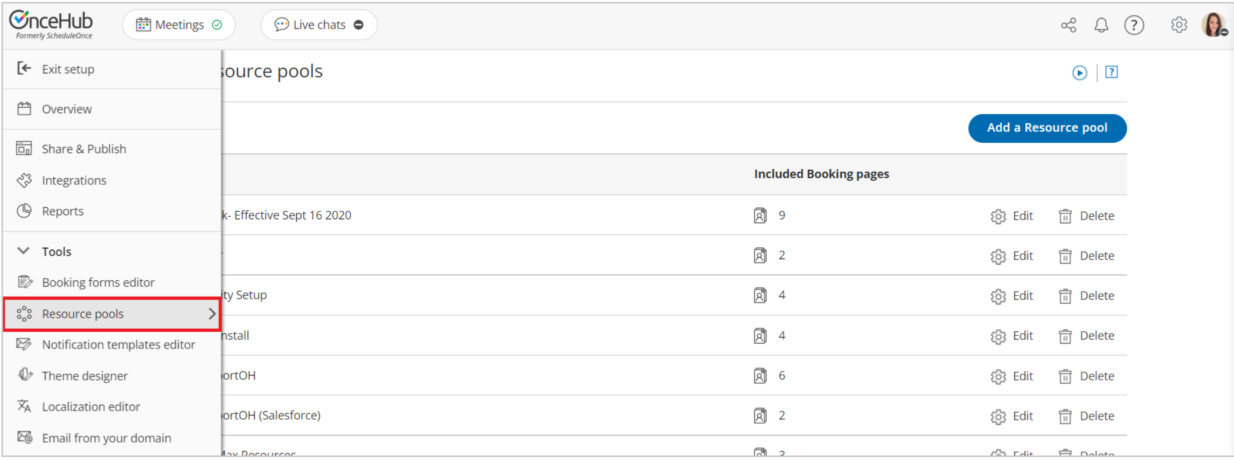


Figure 1: Resource pools in the Tools section

3. Click the **Add a Resource pool** button on the right.
4. The **New Resource pool** pop-up appears (Figure 2).

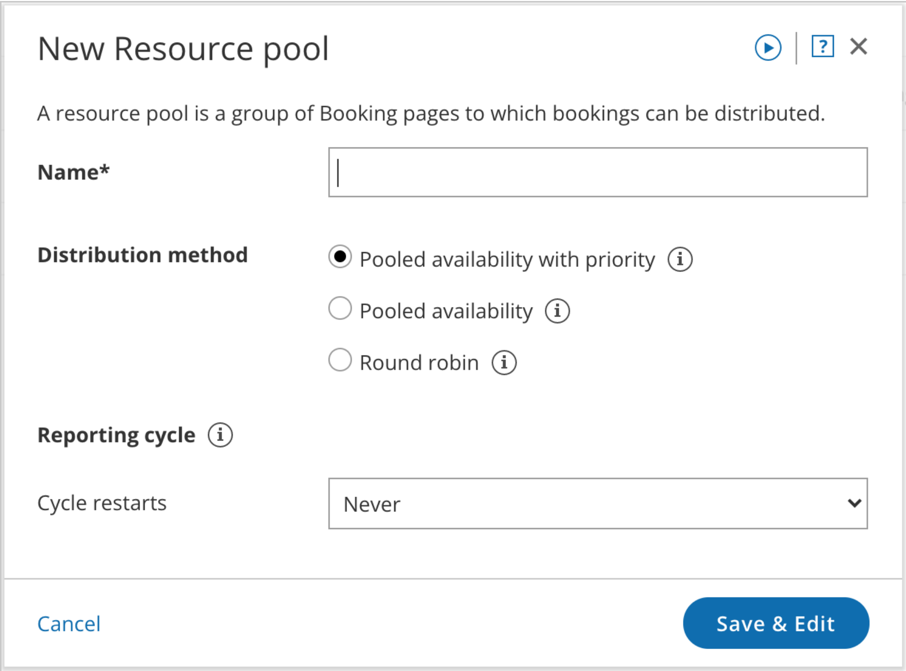


Figure 2: New Resource pool pop-up

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).

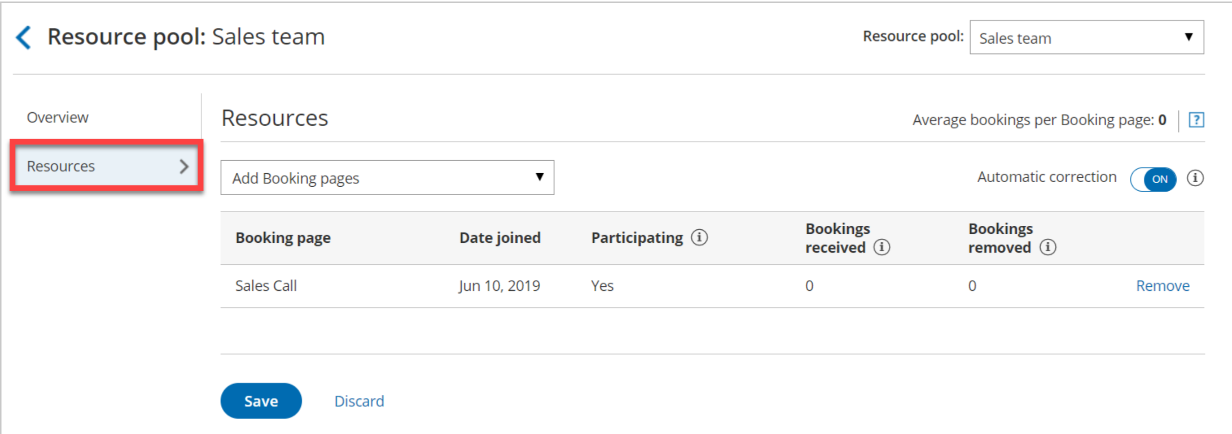


Figure 3: Resource pool Resources section

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.

Round robin distribution method [Classic]

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).

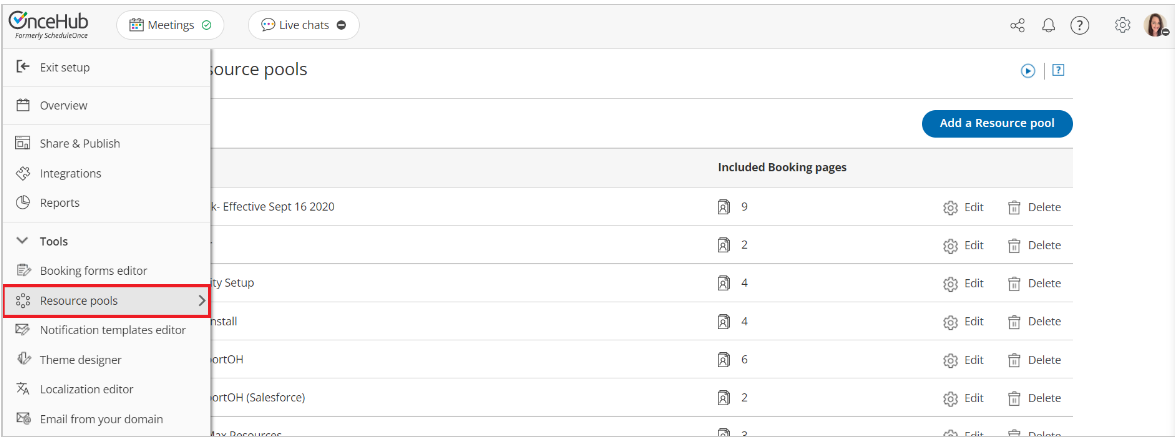


Figure 1: Resource pools in the Tools section

3. Click the **Add a Resource pool** button to create a new Resource pool.
4. The **New Resource pool** pop-up appears (Figure 2).

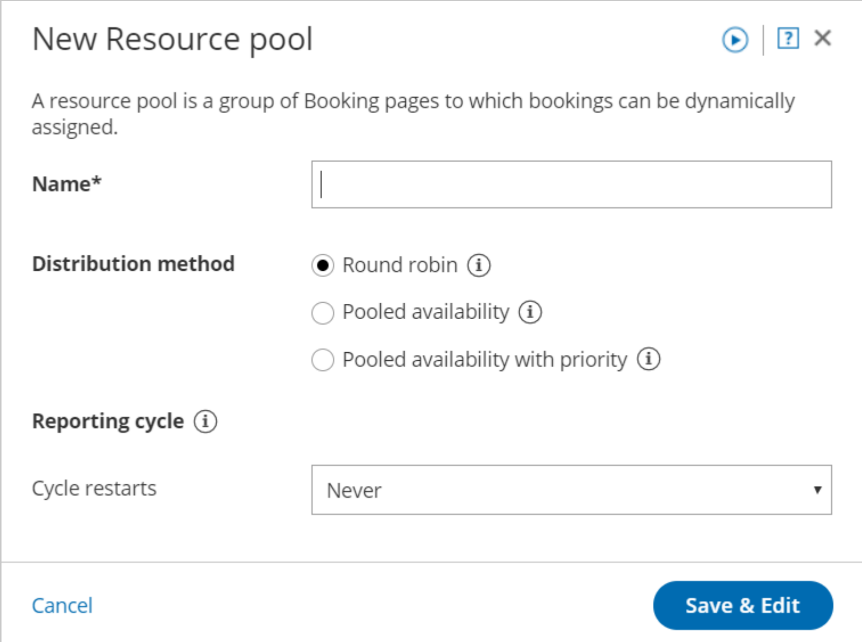


Figure 2: New Resource pool pop-up

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**.

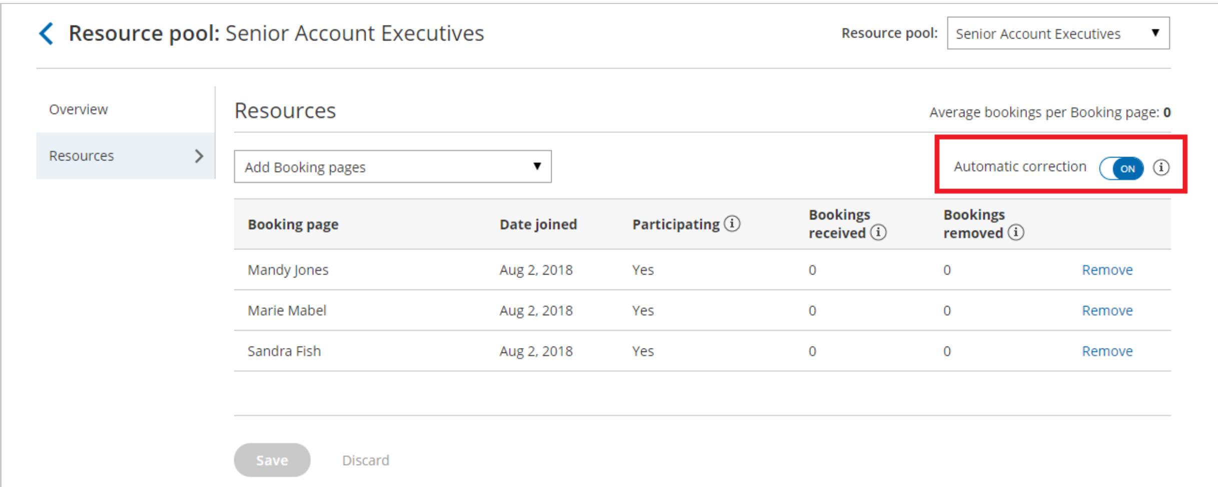


Figure 3: Automatic correction

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.

Pooled availability distribution method [Classic]

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).

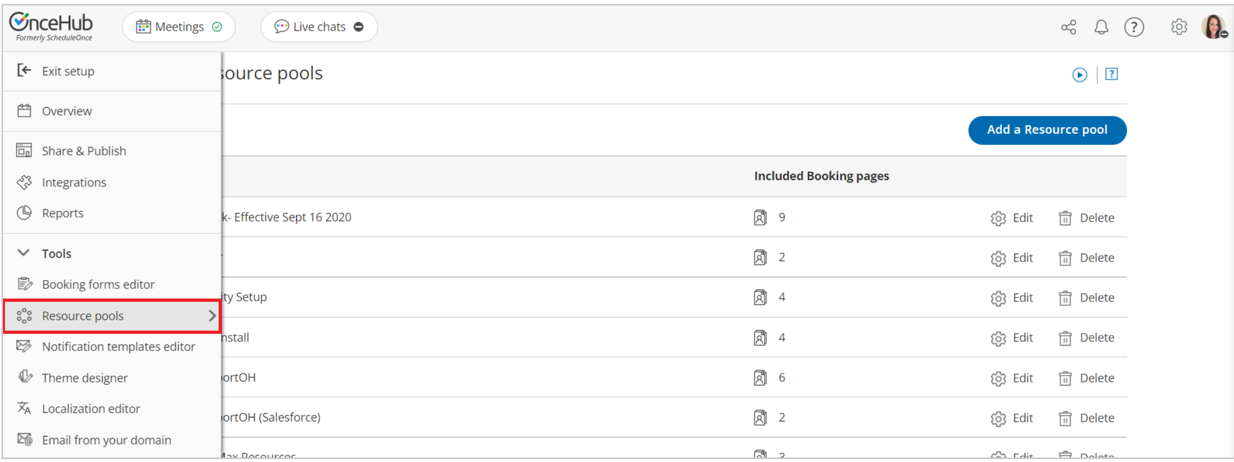


Figure 1: Resource pools

3. Click the **Add a Resource pool** button to create a new Resource pool.
4. The **New Resource pool** pop-up appears (Figure 2).

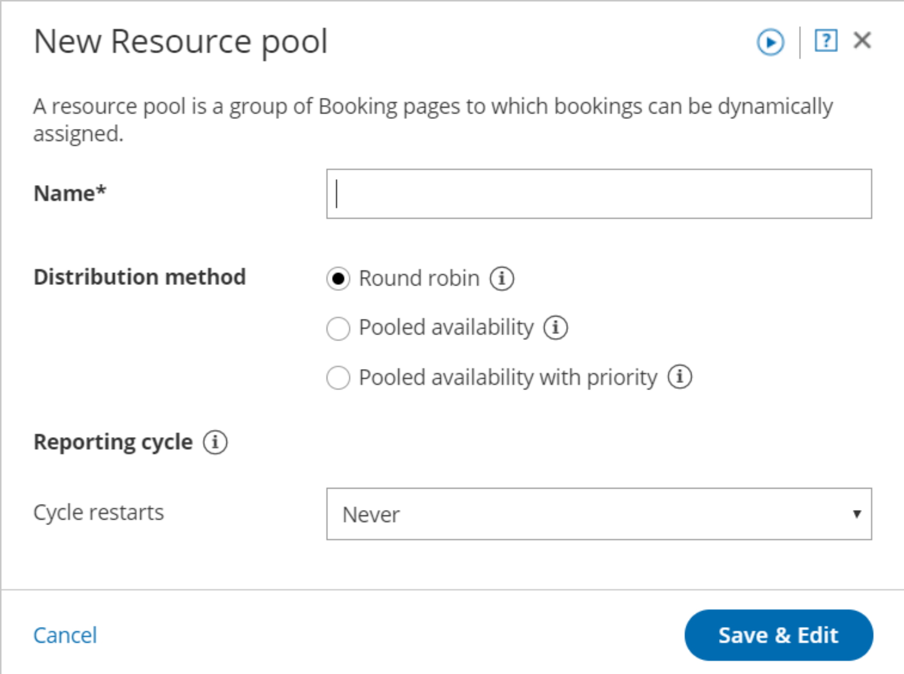


Figure 2: New Resource pool pop-up

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 [Classic]

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).

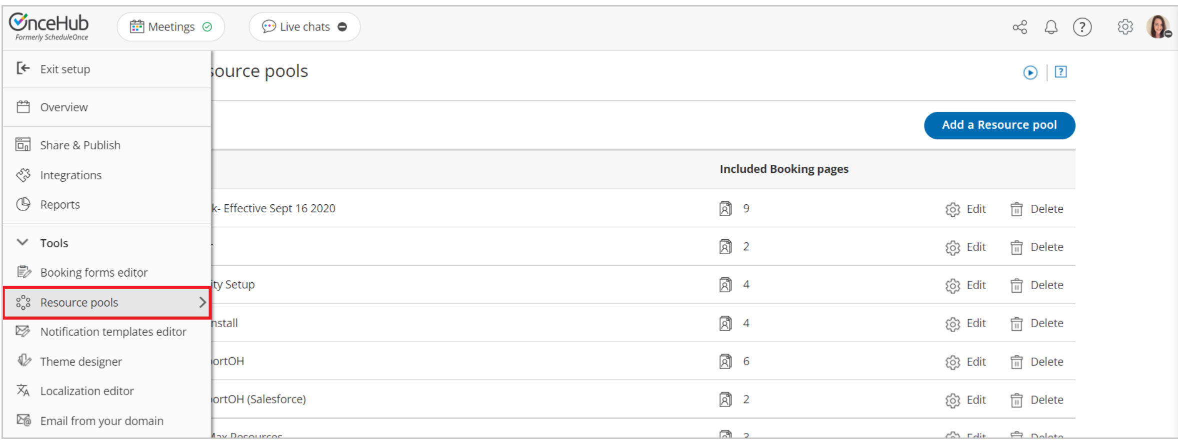


Figure 1: Resource pools

3. Click the **Add a Resource pool** button to create a new Resource pool.
4. The **New Resource pool** pop-up appears (Figure 2).

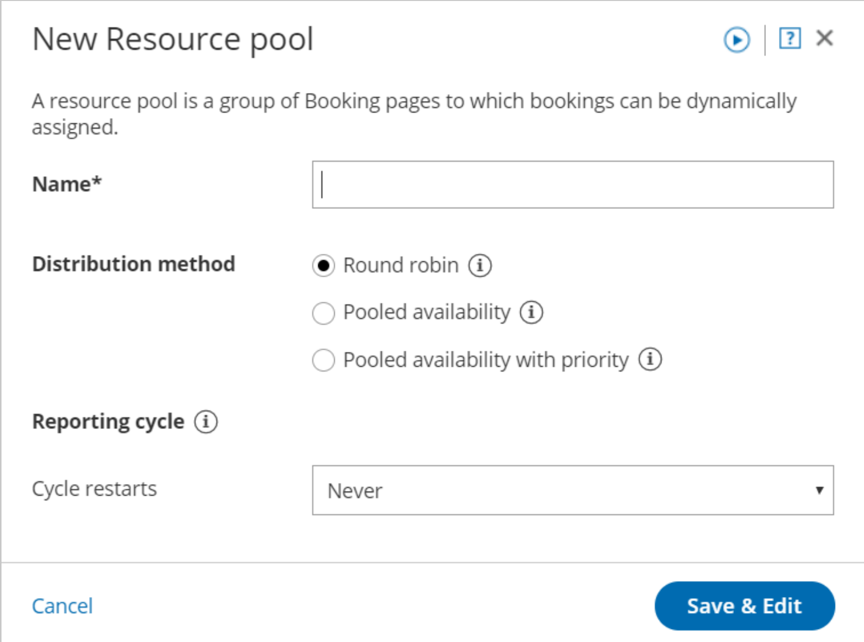


Figure 2: New Resource pool pop-up

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).

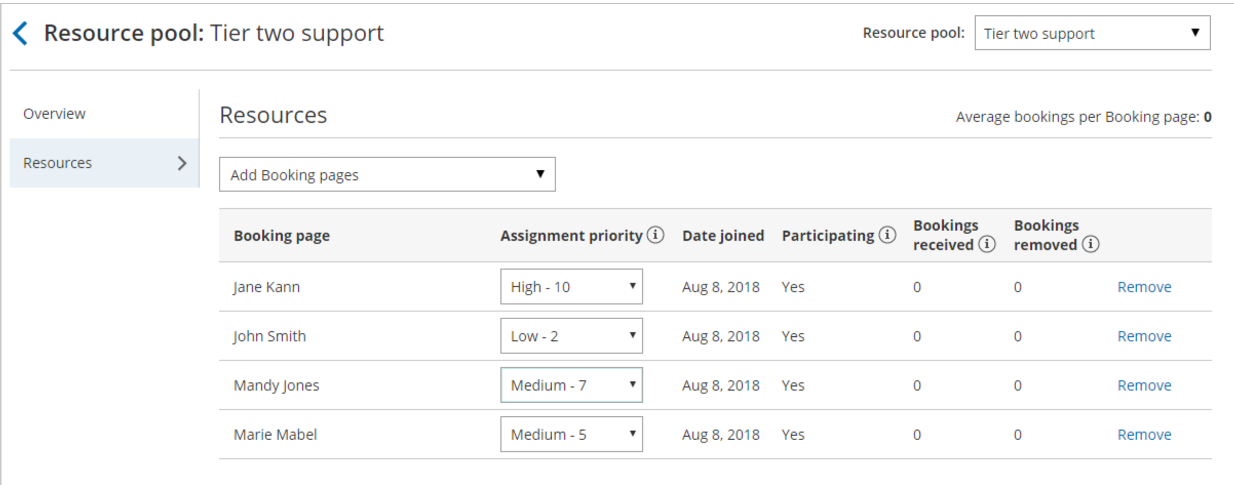


Figure 3: Resource section

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.

Introduction to Pooled availability [Classic]

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

Pooled availability with priority [Classic]

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.

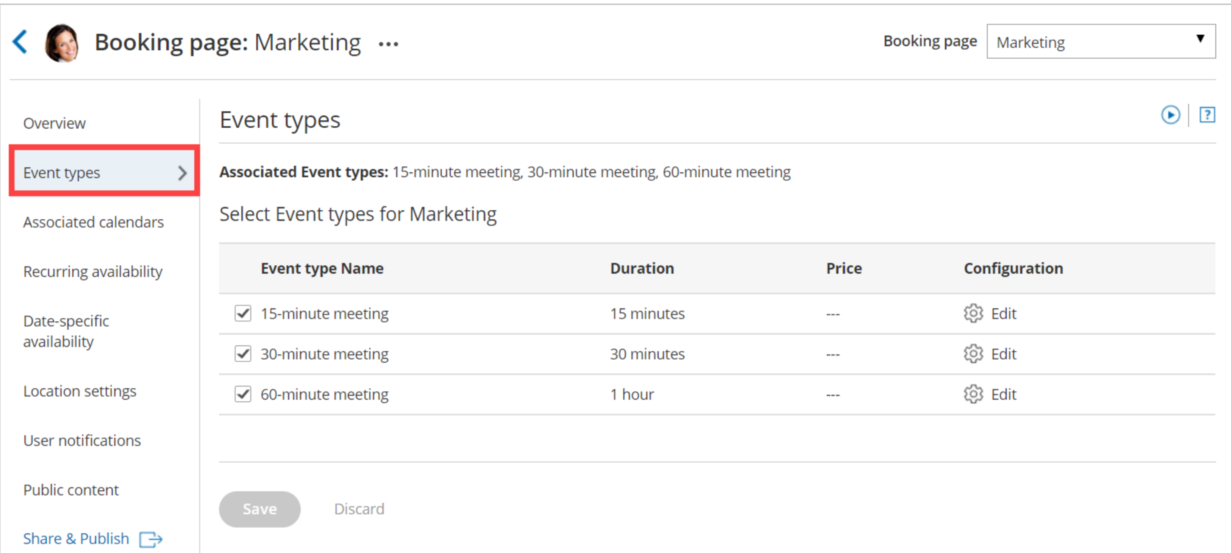


Figure 1: Event types section

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).

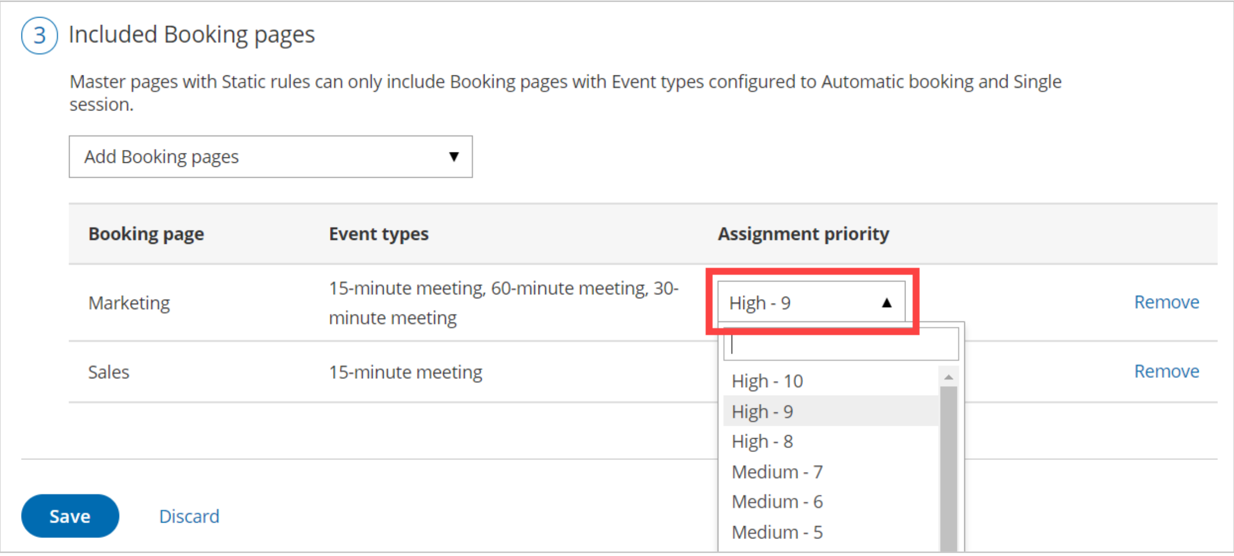


Figure 2: Assignment priority drop-down menu

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

Pooled availability algorithm: Longest idle time [Classic]

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.

Adding Resource pools to Master pages [Classic]

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).

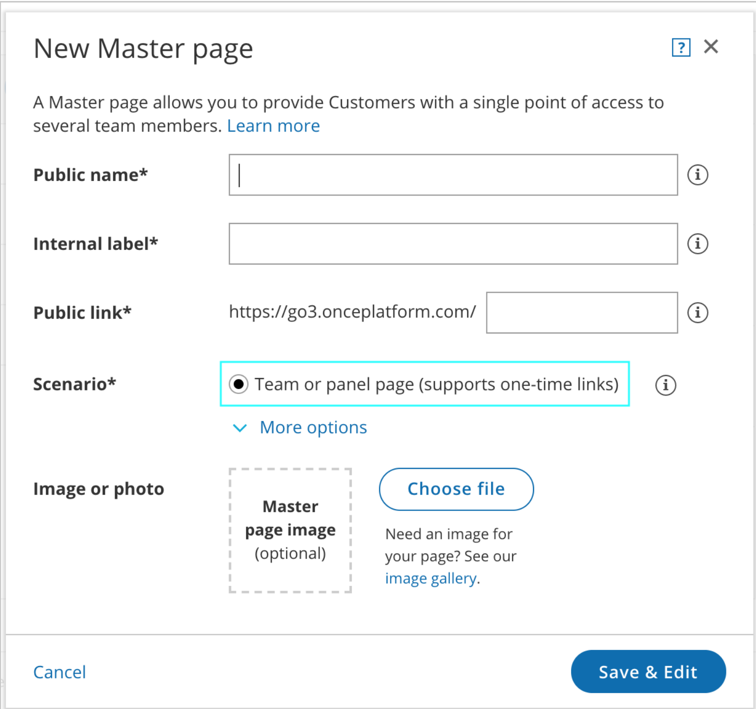


Figure 1: New Master page pop-up

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

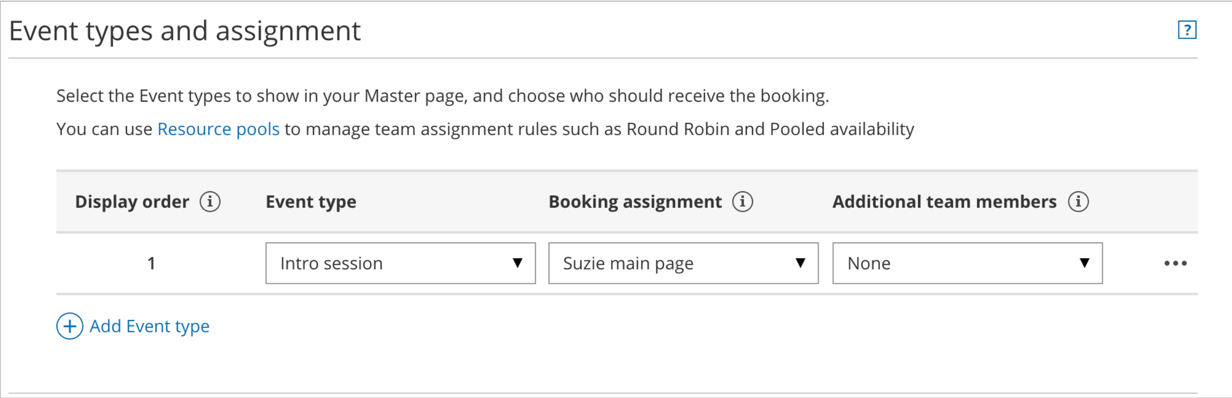


Figure 3: Add Event types and assignment

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).

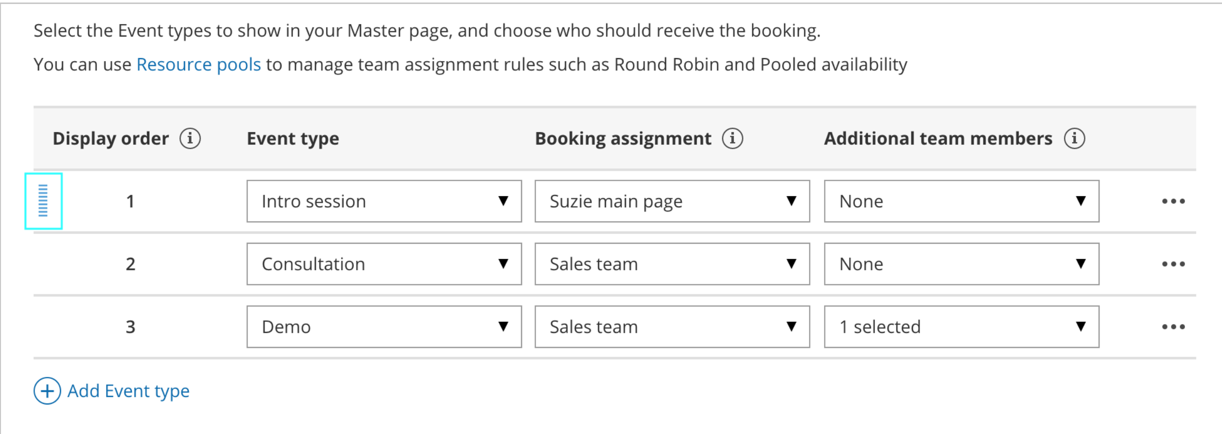


Figure 4: Click and drag a row to reorder

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 pools: Overview [Classic]

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.

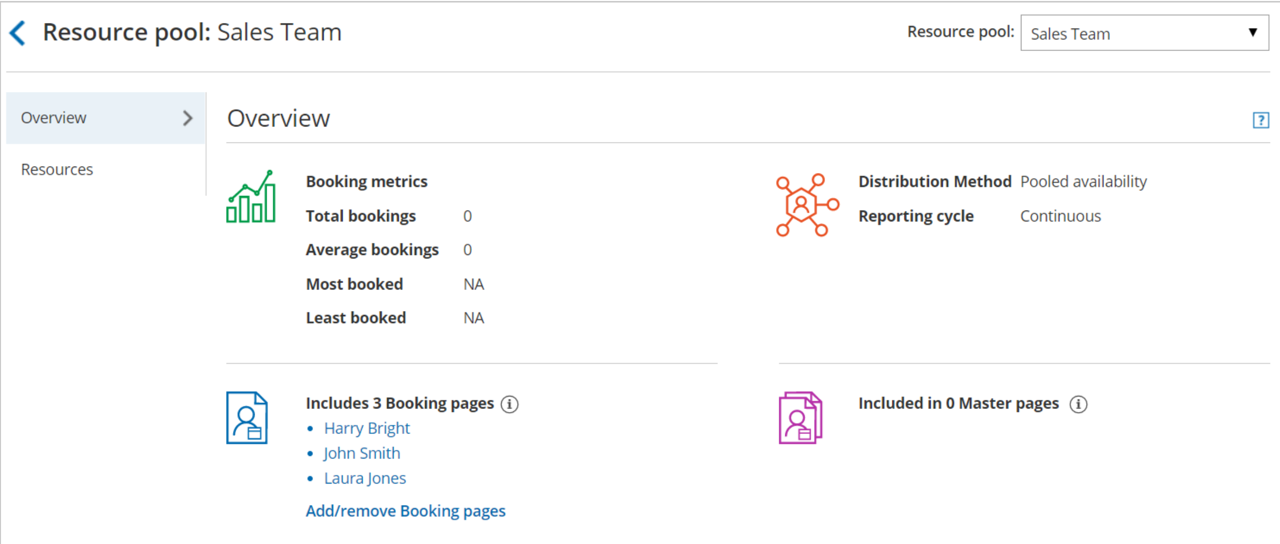


Figure 1: Resource Pool Overview section

Booking metrics

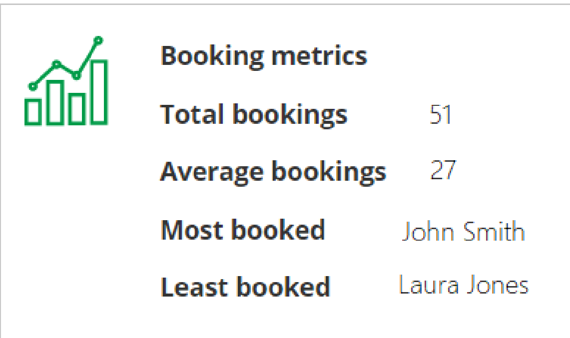


Figure 2: Booking metrics

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

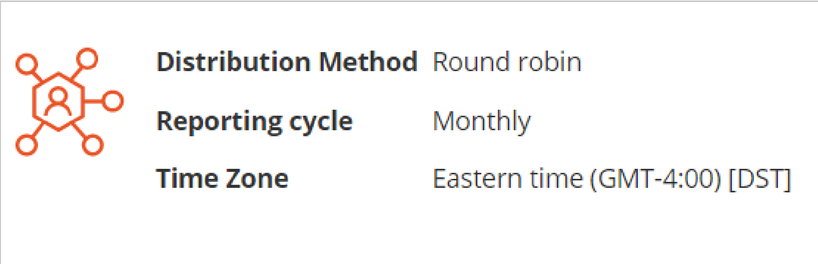


Figure 3: Resource pool main settings

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

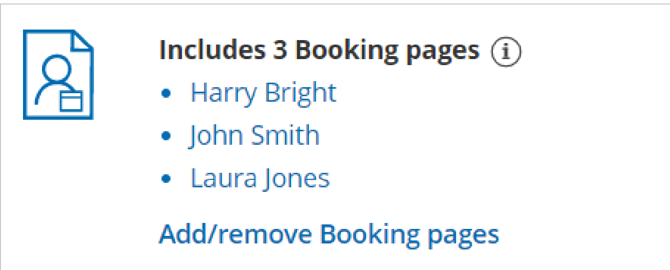


Figure 4: Booking pages included in the Resource pool

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

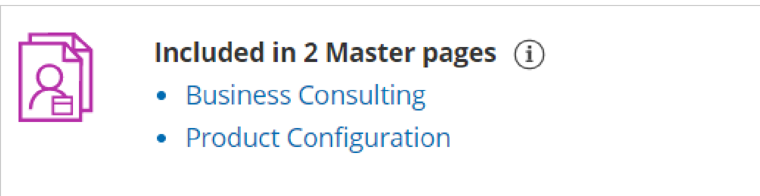


Figure 5: Master pages that the Resource pool is included in

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: Reporting cycle [Classic]

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).

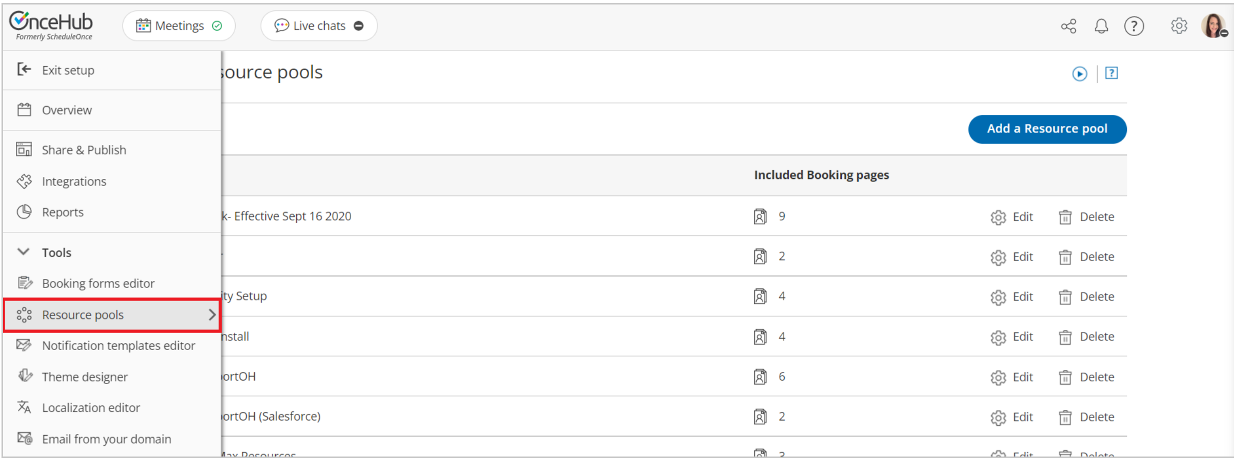


Figure 1: Resource pools

3. Click the **Add a Resource pool** button to create a new Resource pool.
4. The **New Resource pool** pop-up appears (Figure 2).

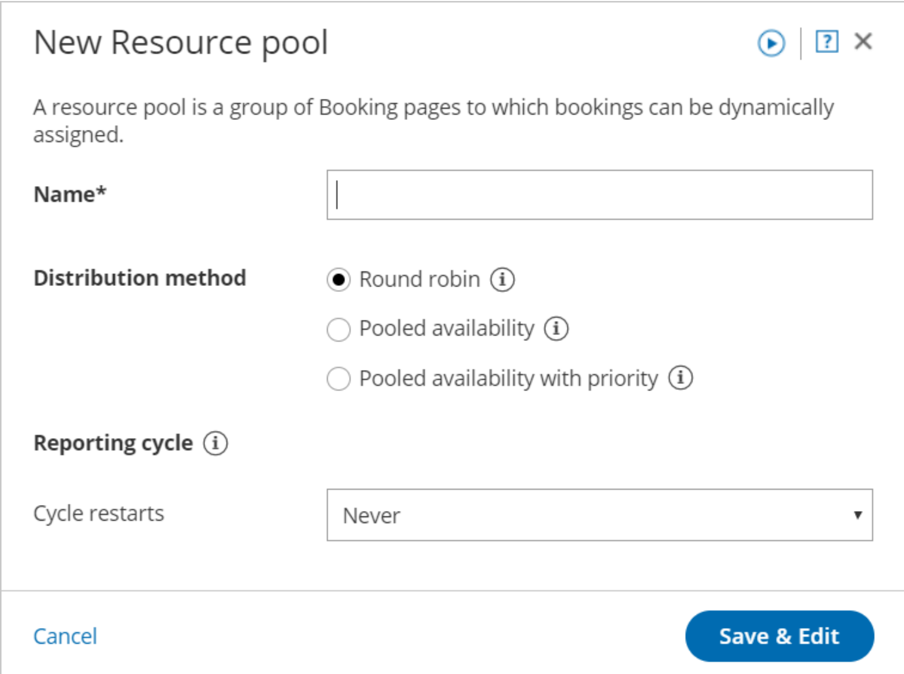


Figure 2: New Resource pool pop-up

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.

Resource pools: Resources [Classic]

[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.

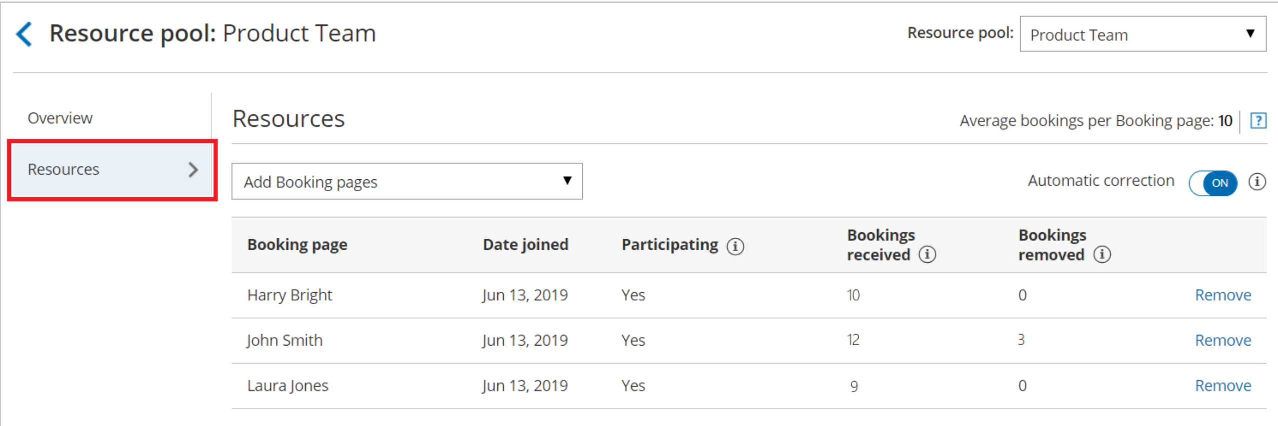


Figure 1: Resource pool Resources section

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).

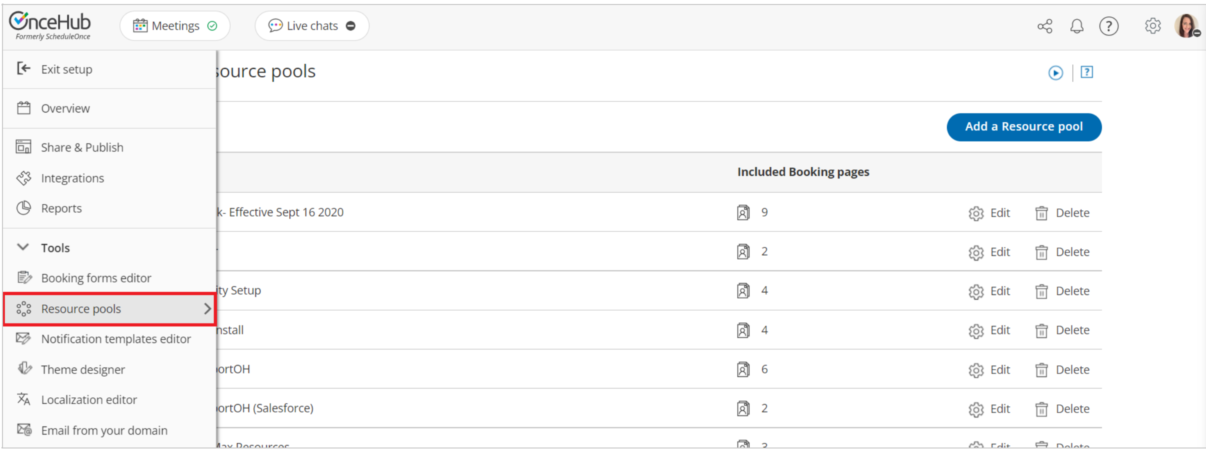


Figure 1: Resource pools

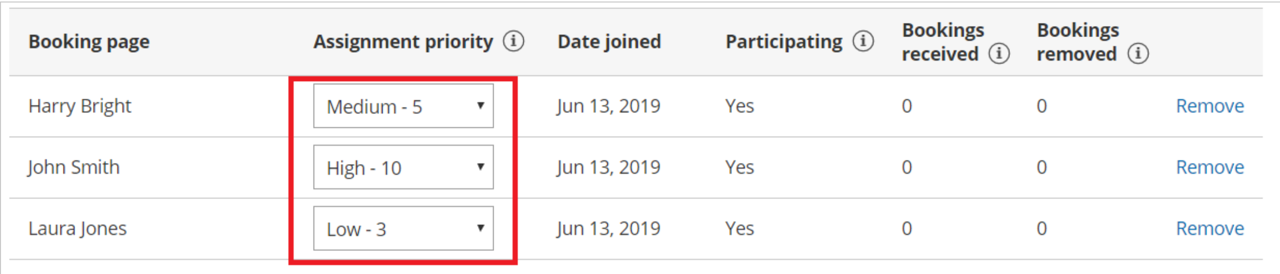
3. Select the Resource pool that you'd like to add Booking pages to.
4. Go to the **Resources** section.
5. Using the **Add Booking pages** drop-down menu, select the Booking pages you would like to be part of this Resource pool. You can add as many Booking pages as you like. All types of Booking pages 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



Booking page	Assignment priority	Date joined	Participating	Bookings received	Bookings removed	
Harry Bright	Medium - 5	Jun 13, 2019	Yes	0	0	Remove
John Smith	High - 10	Jun 13, 2019	Yes	0	0	Remove
Laura Jones	Low - 3	Jun 13, 2019	Yes	0	0	Remove

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

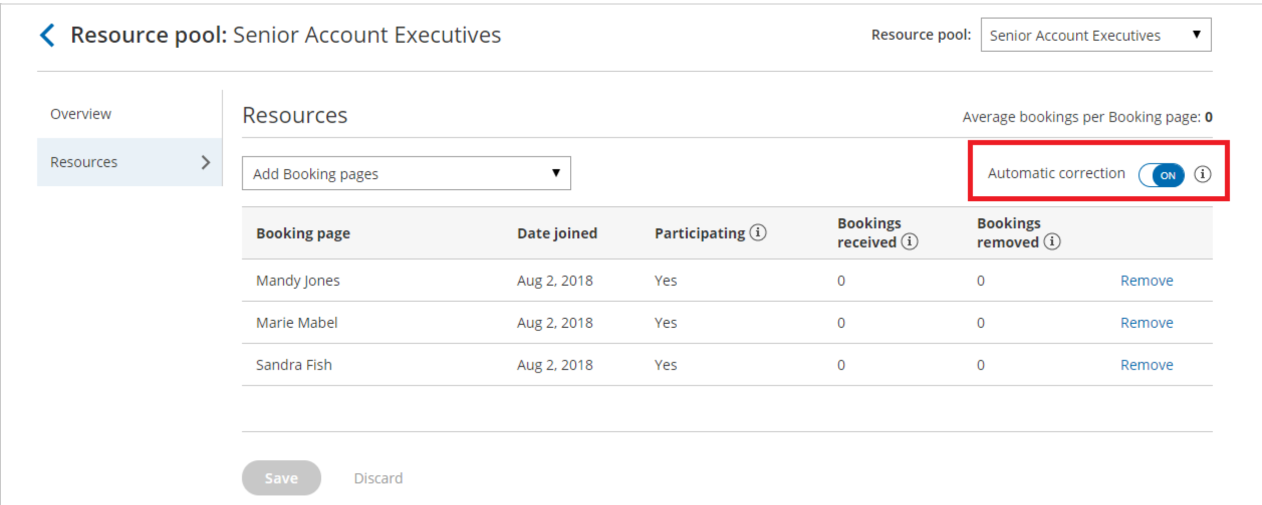


Figure 3: Automatic correction

Resource pools: Assignment priority [Classic]

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.

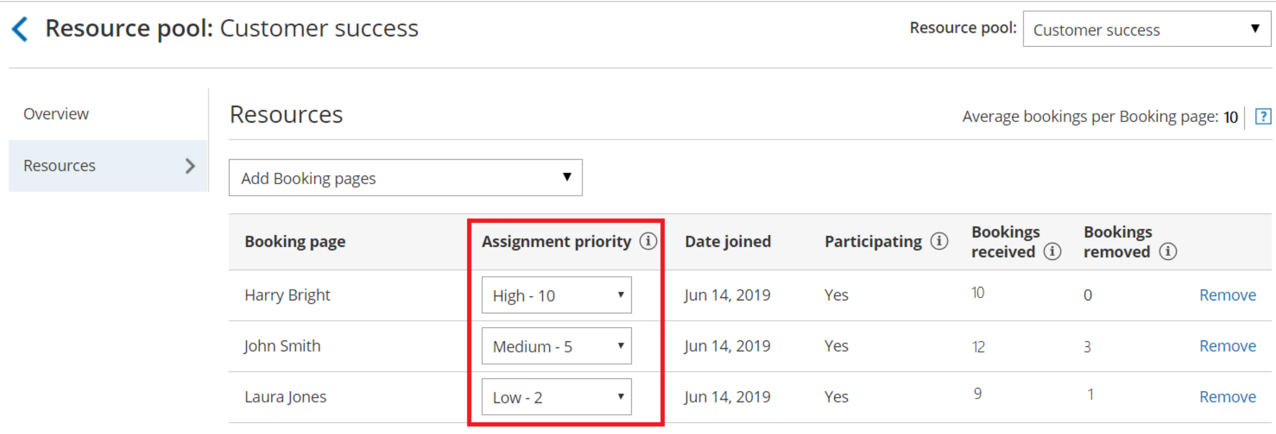


Figure 1: Resource pool Assignment priority

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

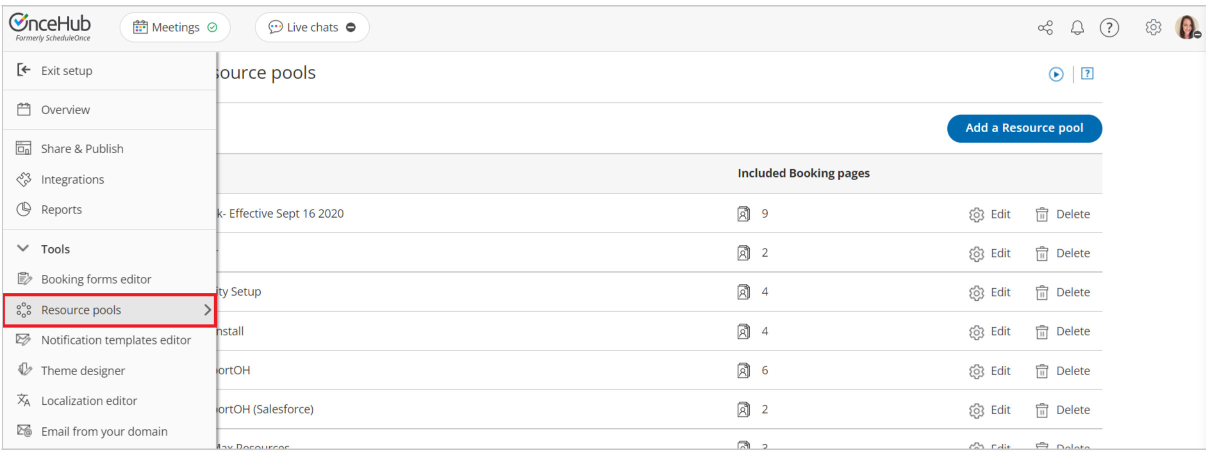
1. Go to **Booking pages** in the bar on the left.
2. Select **Resource pools** on the left (Figure 1).
3. 

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 [Classic]

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.

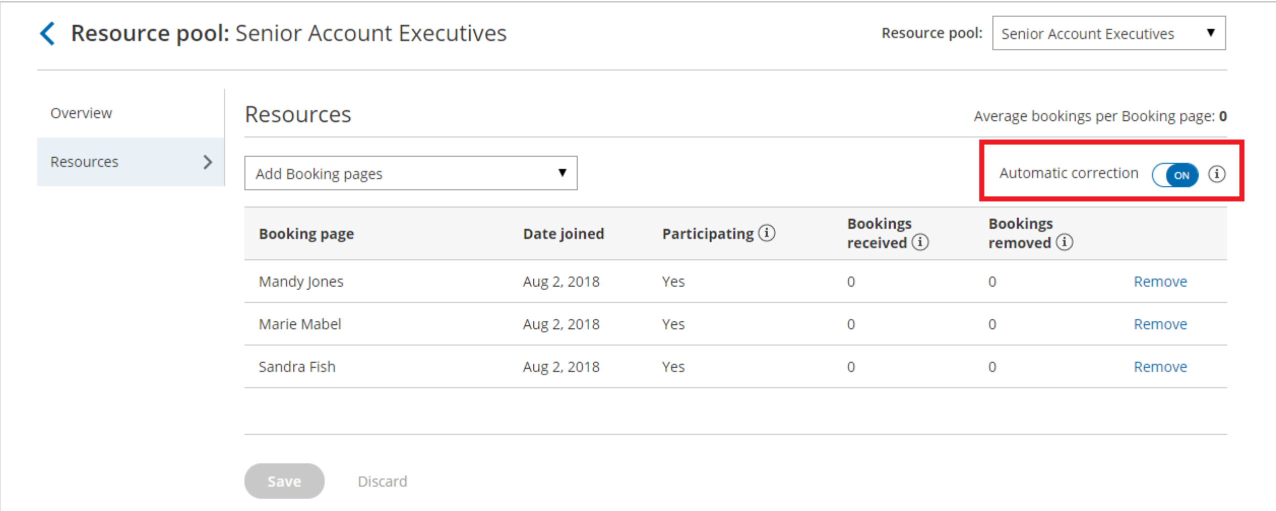


Figure 1: Round robin Resource pool with Automatic correction

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).

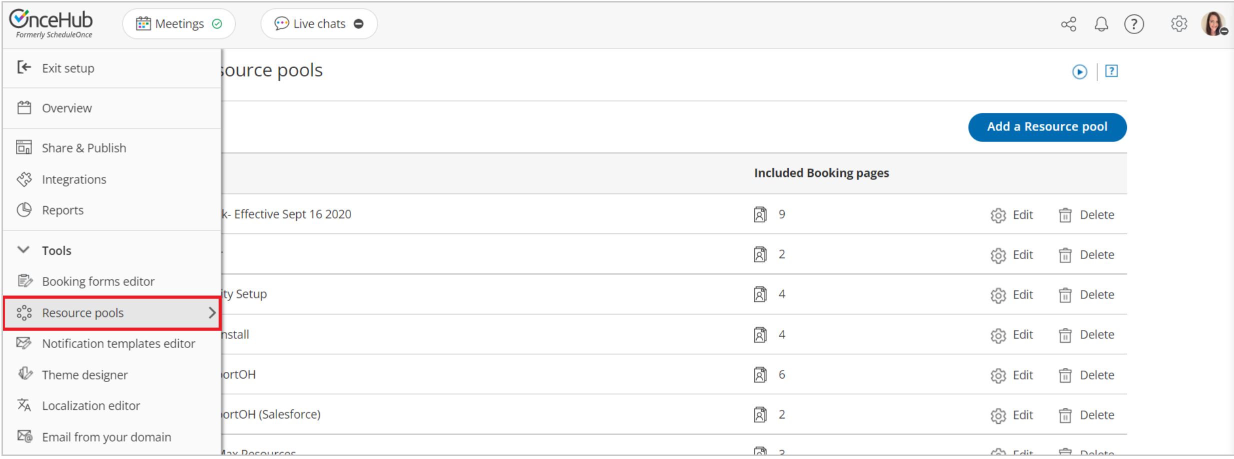


Figure 2: Resource pools

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.

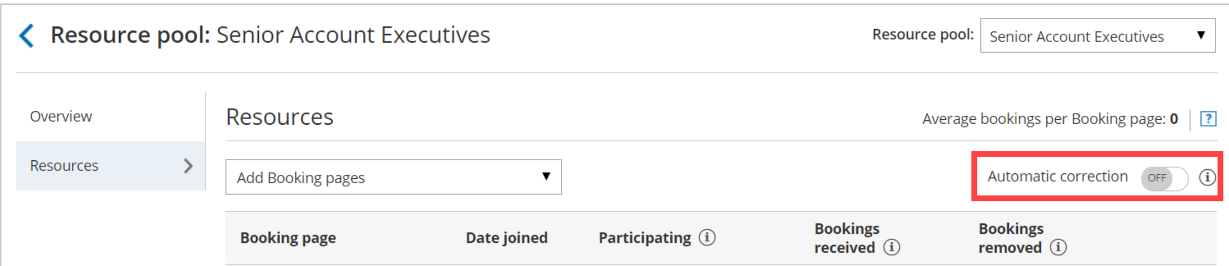


Figure 3: Set Automatic correction to OFF

Resource pool statistics: Bookings received [Classic]

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).

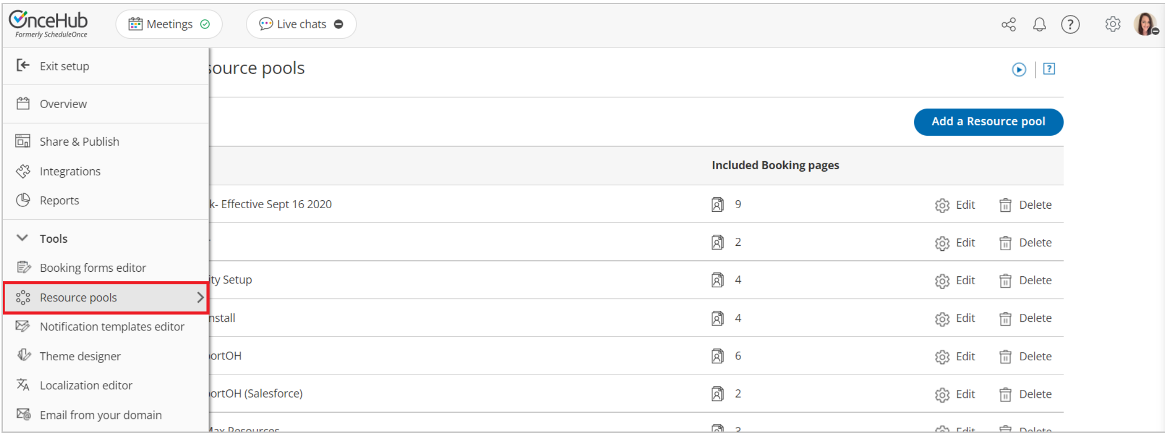


Figure 2: Resource pools

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).

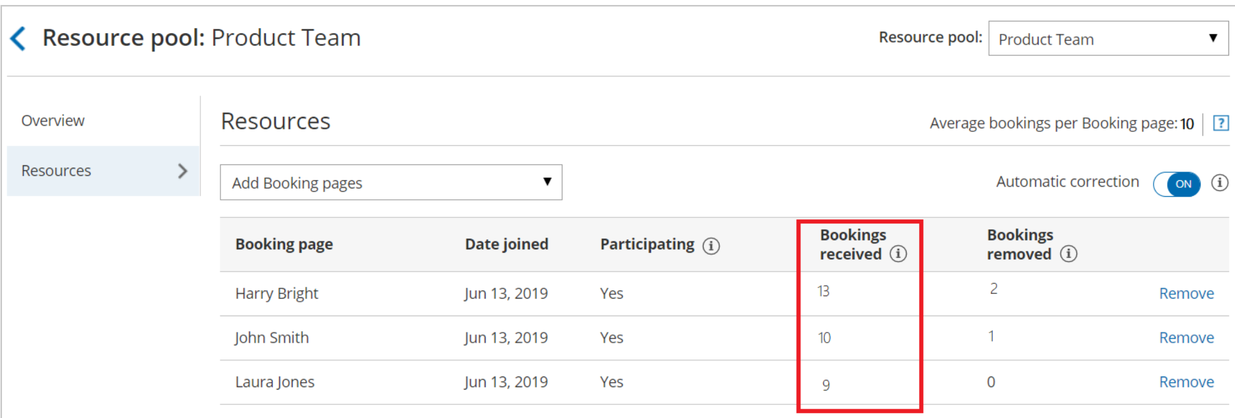


Figure 2: Bookings received

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 [Classic]

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).

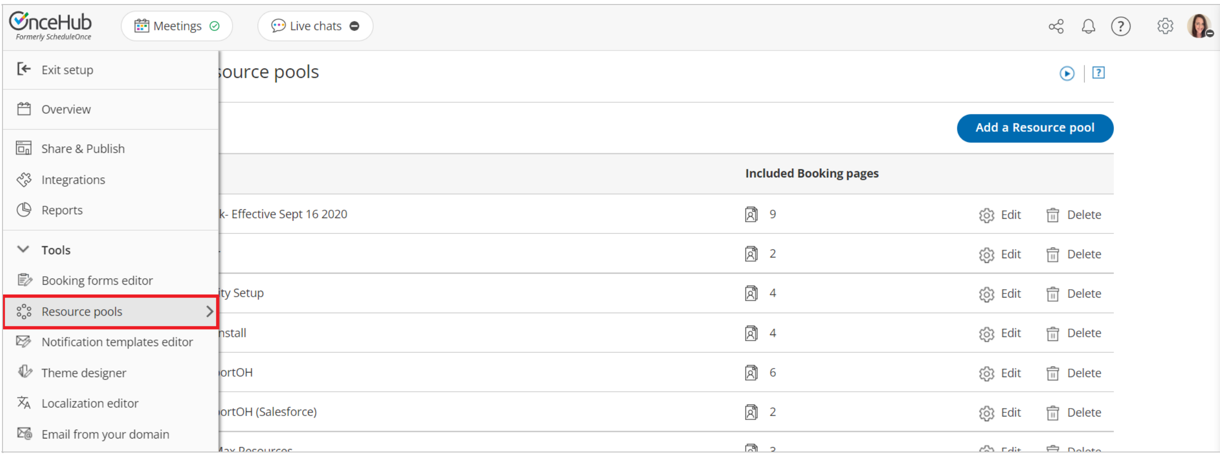


Figure 1: Resource pools

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).

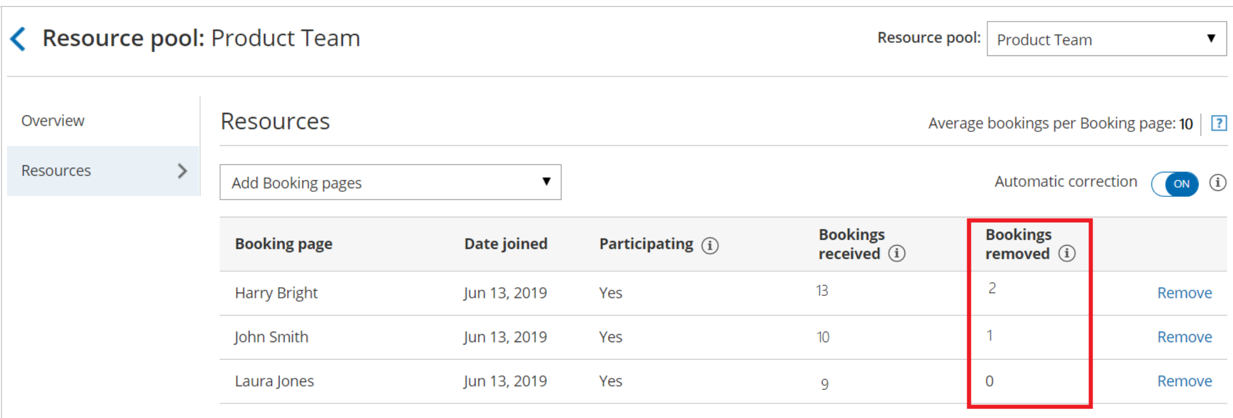


Figure 2: Bookings removed in the Resource pool's Resources section

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.

Introduction to Panel meetings [Classic]

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 [Classic]

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).

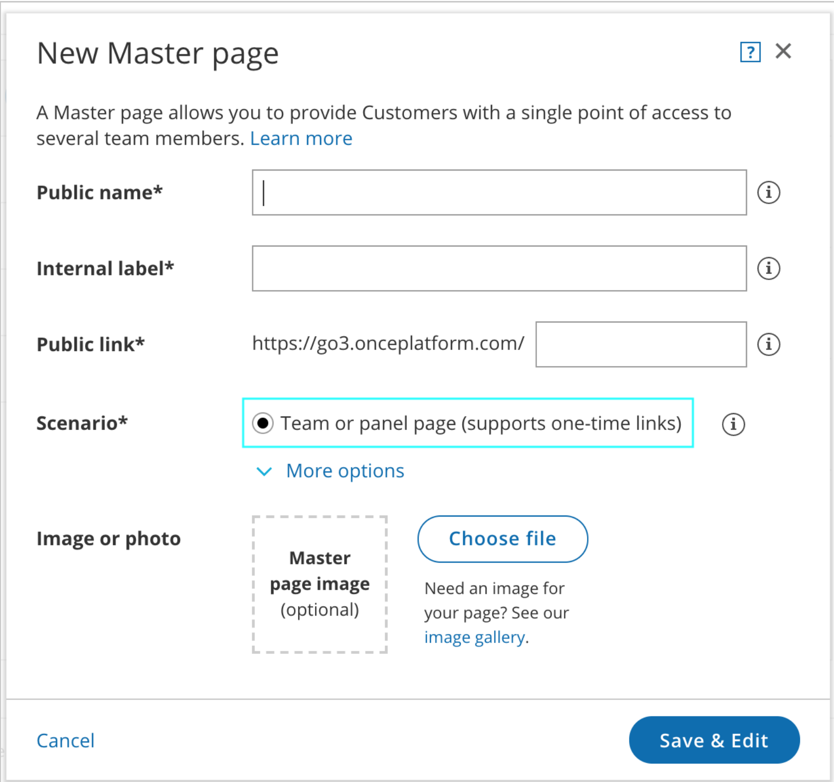


Figure 1: New Master page pop-up

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).

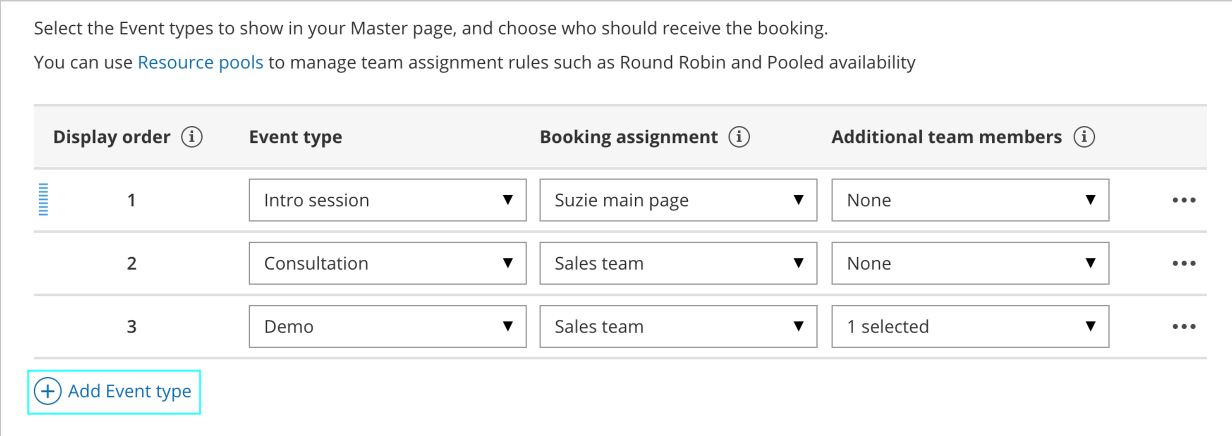


Figure 3: Event-based rules step

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 [Classic]

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).

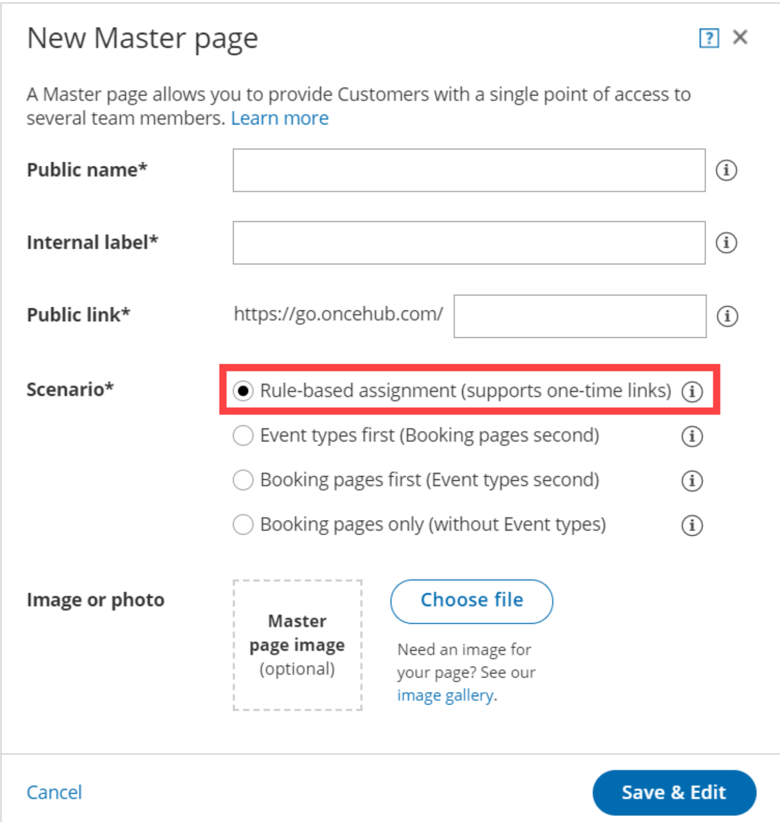


Figure 1: New Master page pop-up

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).

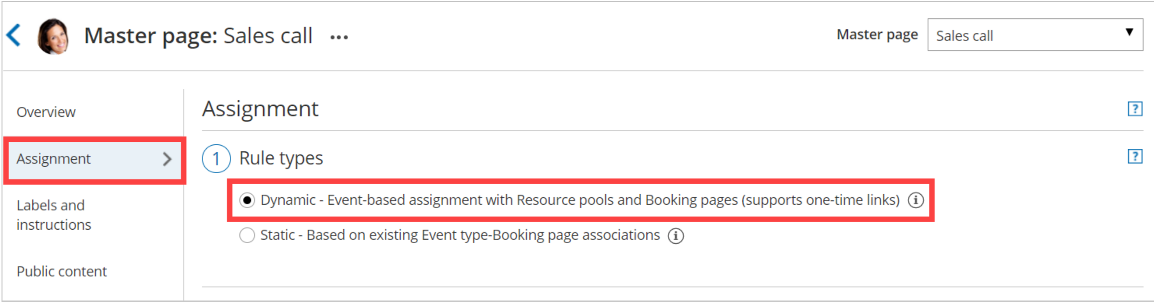


Figure 2: Select Dynamic as the Rule type

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

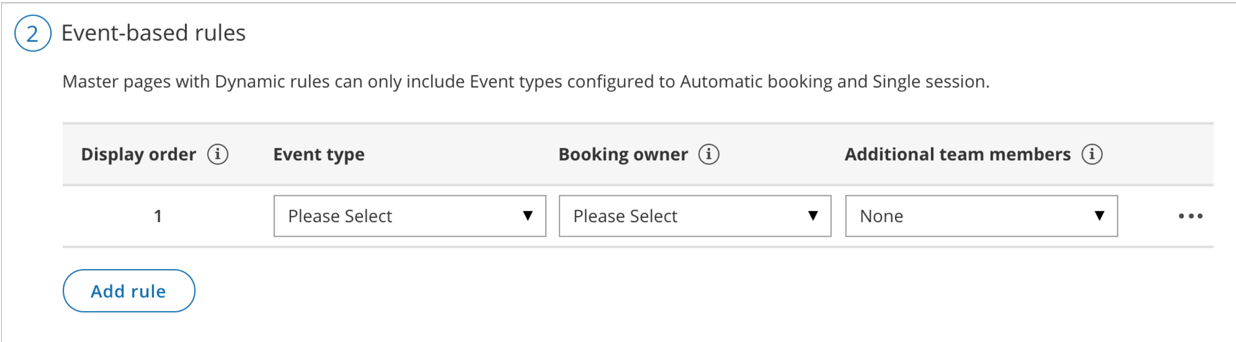


Figure 3: Add an event-based rule

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 [Classic]

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 :

When determining busy time for an Additional team member, the system uses the Main calendar specified on their assigned Booking Page. However, any calendar event created during the booking process is saved to their default connected calendar.

To ensure consistency, we recommend setting the default connected calendar as the Main calendar on their Booking Page whenever they are assigned as an Additional team member.

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).

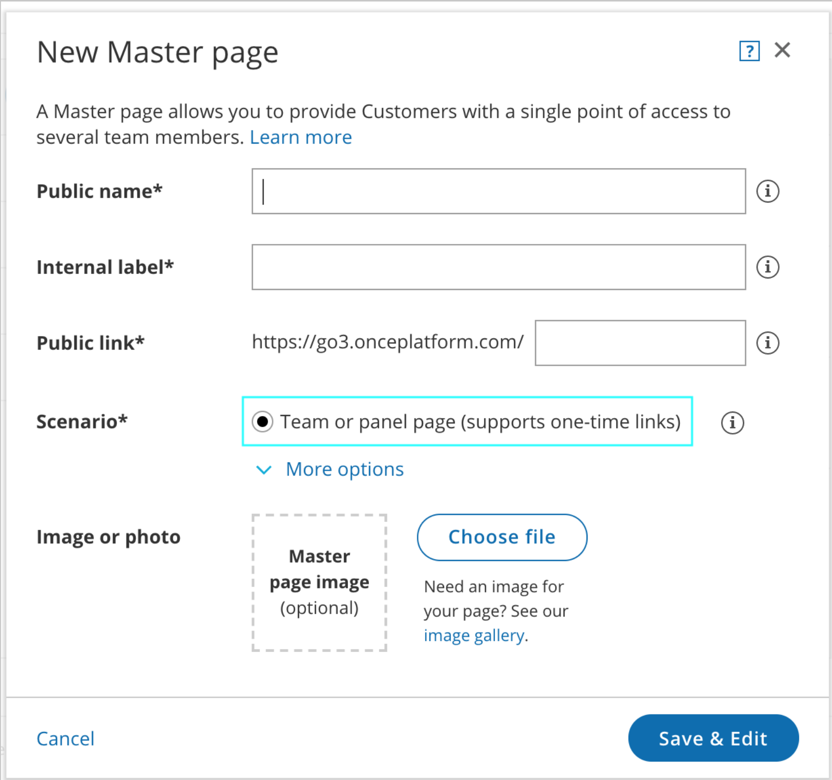


Figure 1: New Master page pop-up

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

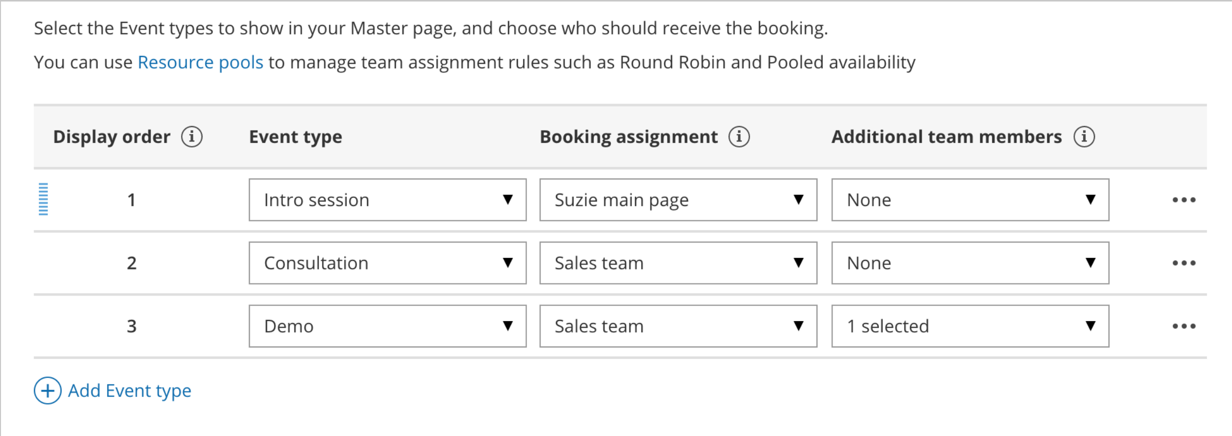


Figure 2: Add Event types

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.

Introduction to the Theme designer [Classic]

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).

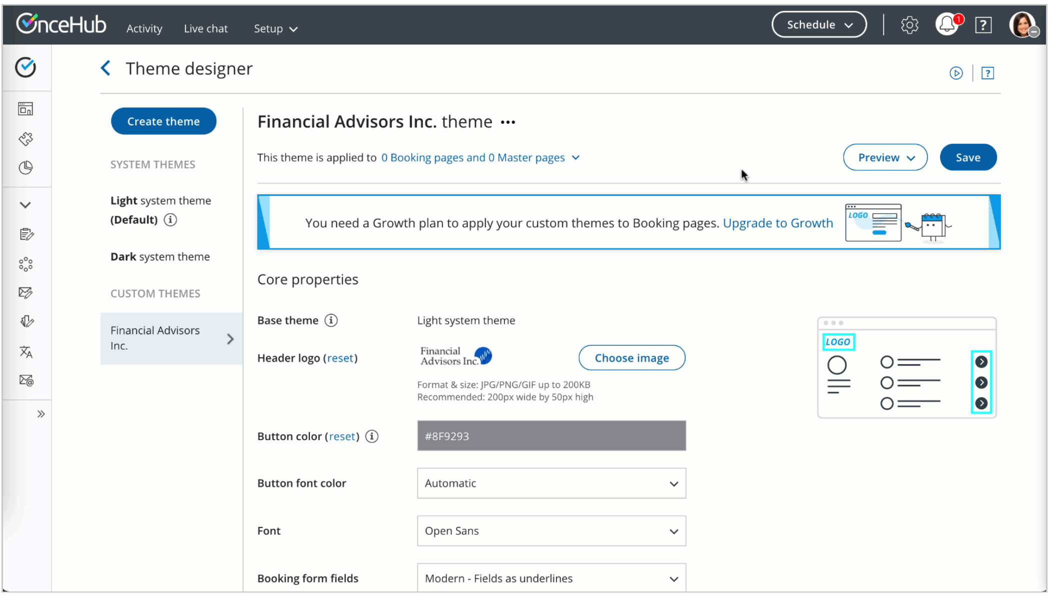


Figure 1: Previewing a theme

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).

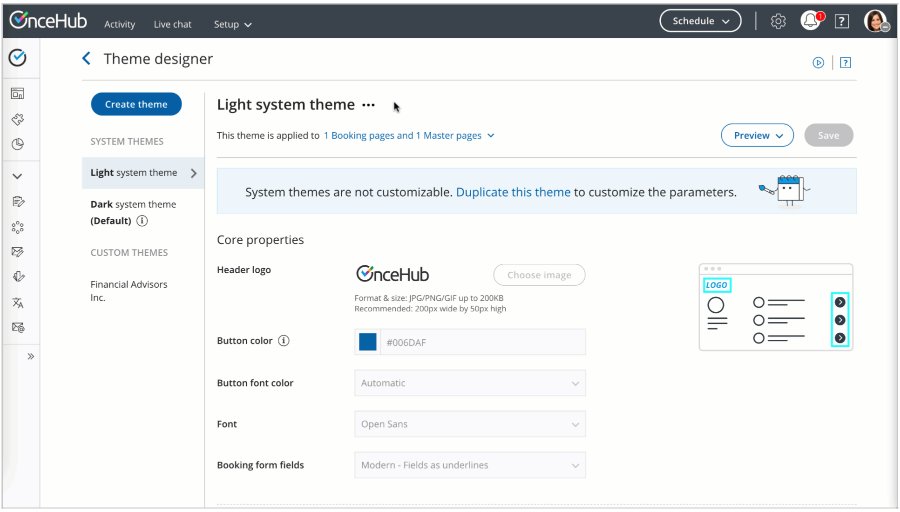


Figure 2: Set as default theme

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 [Classic]

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).

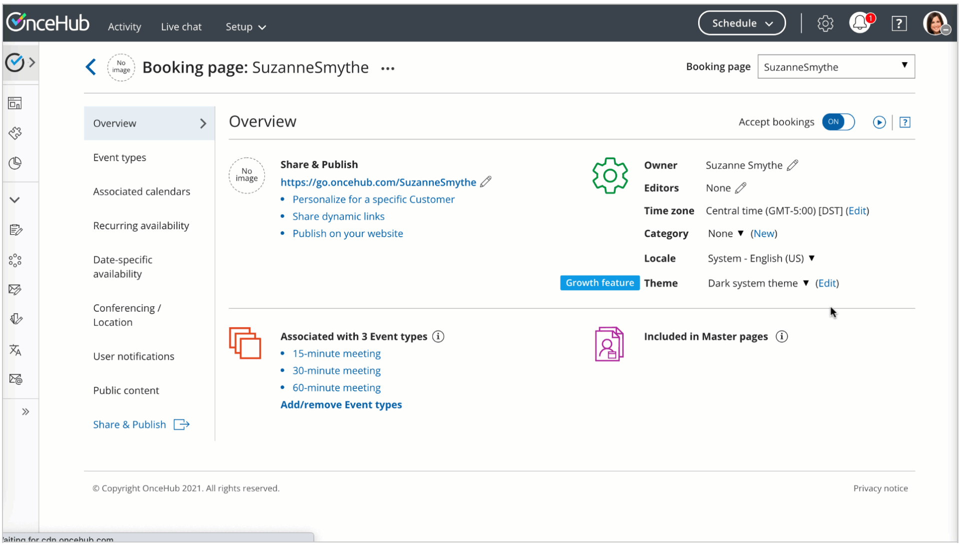


Figure 1: Apply a theme directly to a page

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.

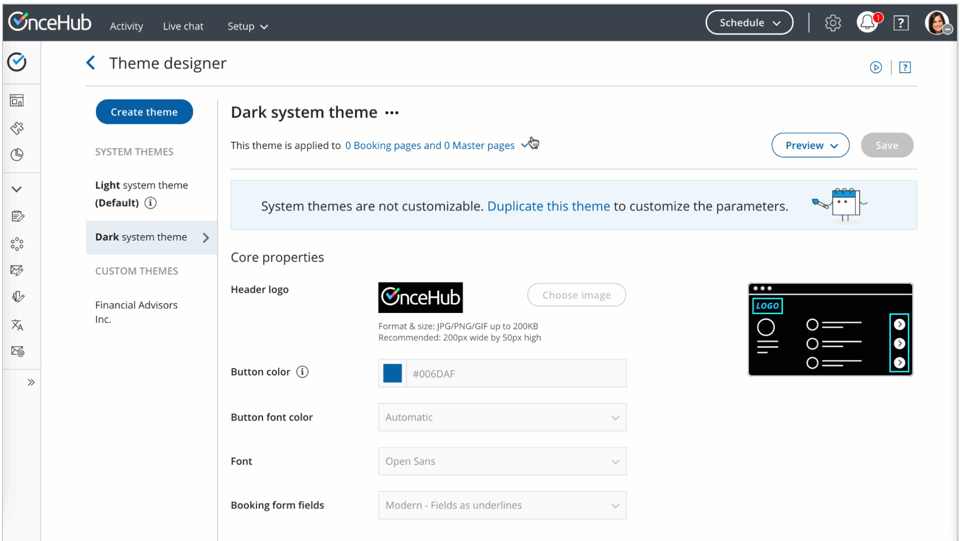


Figure 2: Apply a theme

Your default theme

In the Theme designer, you can set a default theme that applies to any newly created Booking page or Master page.

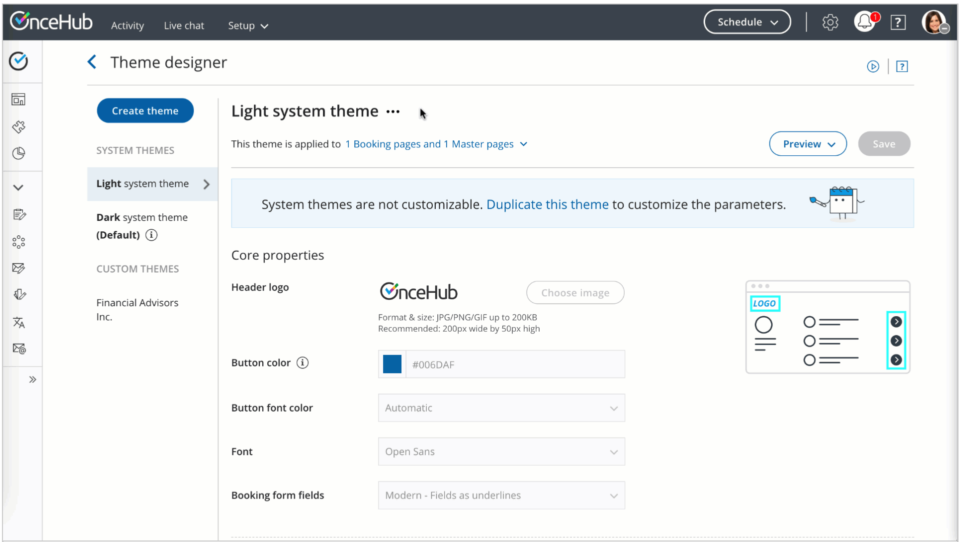


Figure 3: Apply a default theme

System themes [Classic]

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).

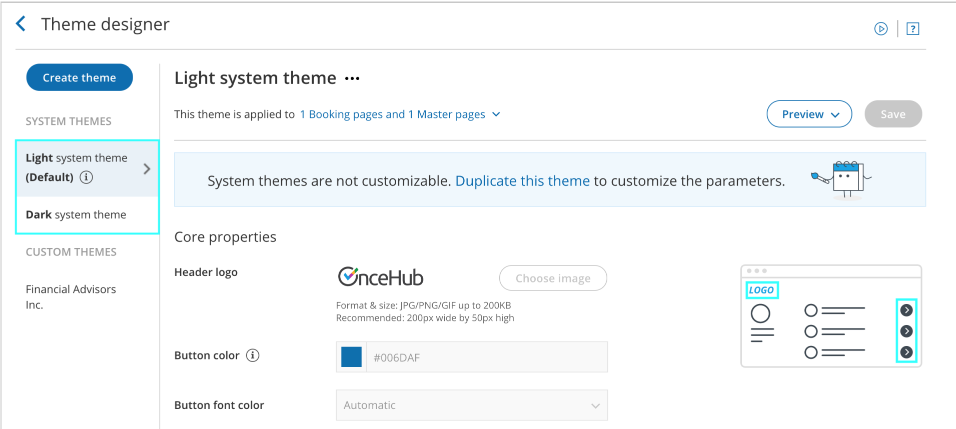


Figure 1: Select a System theme

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.

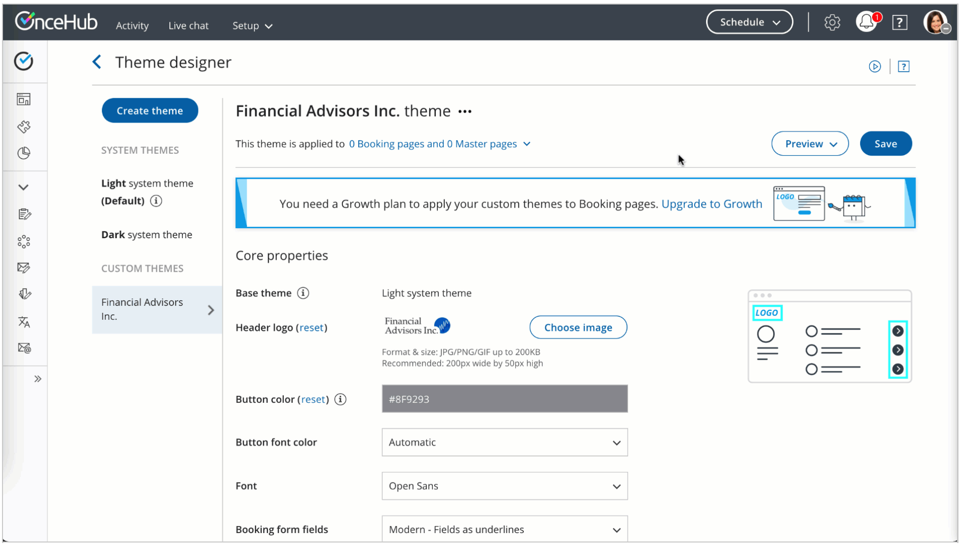


Figure 2: Preview a System theme

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.

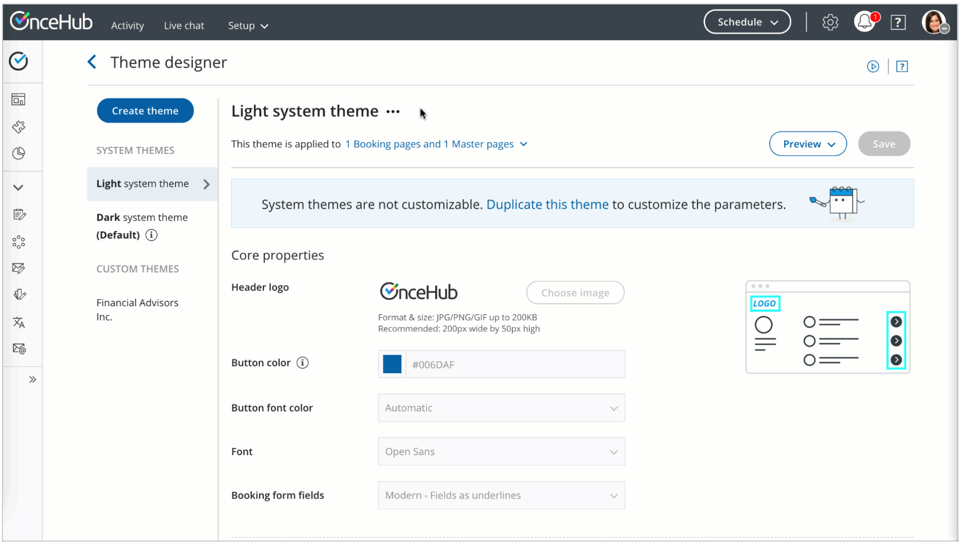


Figure 3: Set as default theme

Available System themes

- **Light** (This is the default theme)

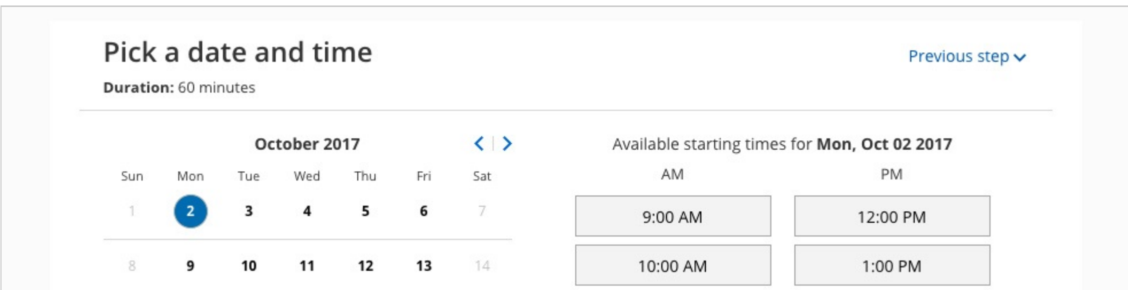


Figure 4: Light system theme

- **Dark**

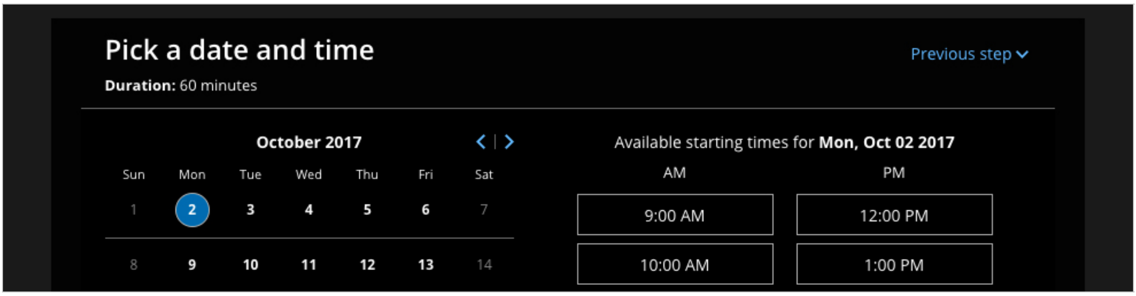


Figure 5: Dark system theme

Custom themes [Classic]

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).

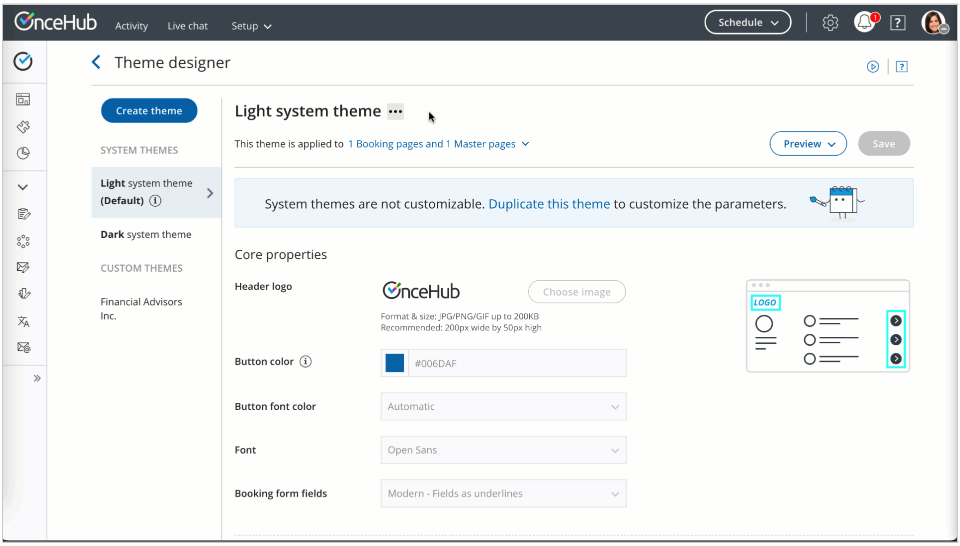


Figure 2: Duplicate theme button

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

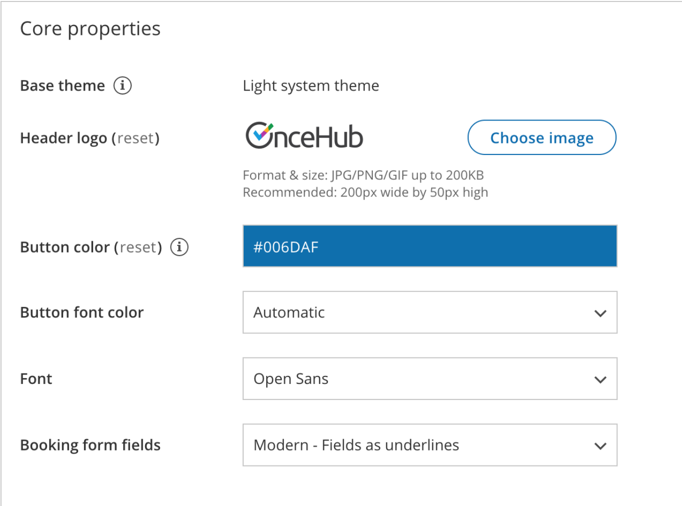


Figure 3: Core properties

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.

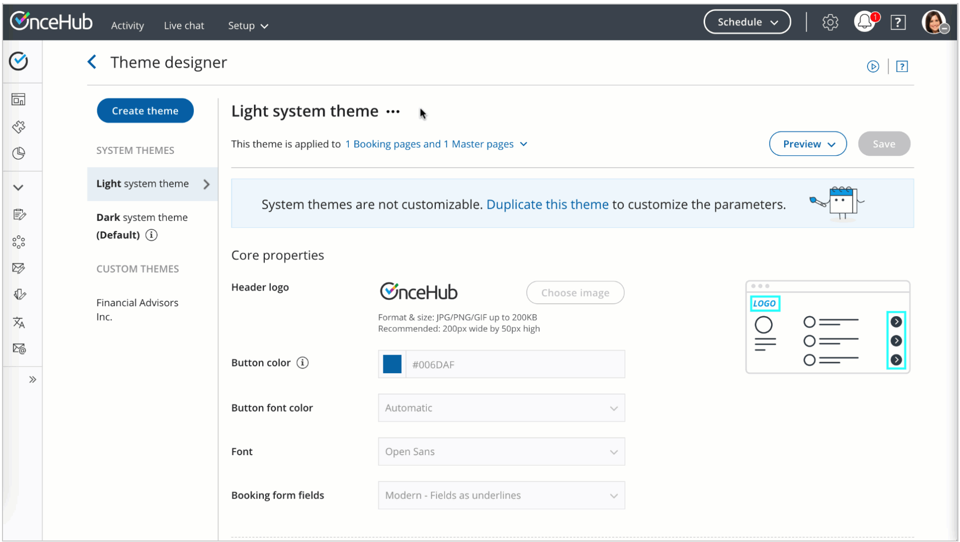


Figure 4: Default theme

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.

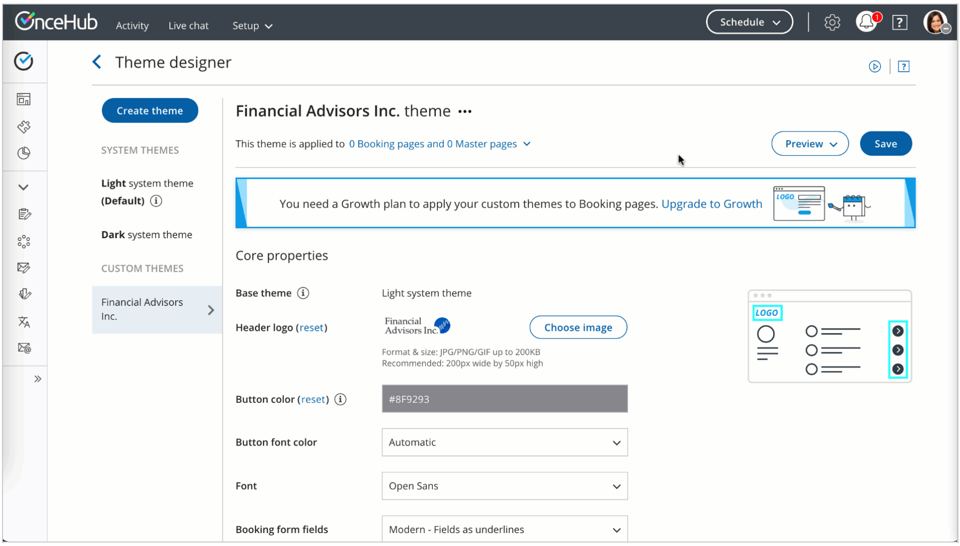


Figure 5: Previewing a theme

Once you're happy with it, you can apply the theme.

Theme properties [Classic]

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

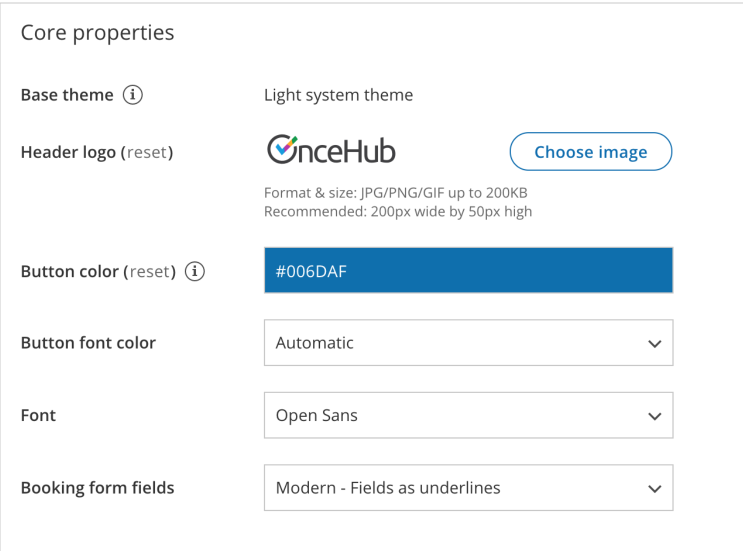


Figure 1: Core properties for a Custom theme

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

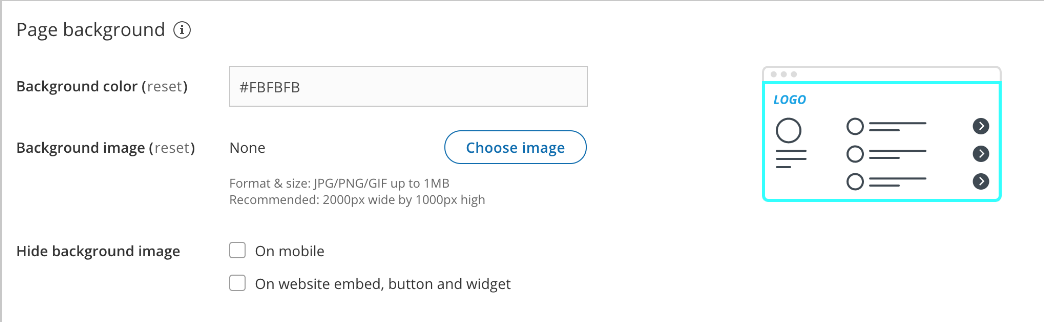


Figure 2: Page background properties

- **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

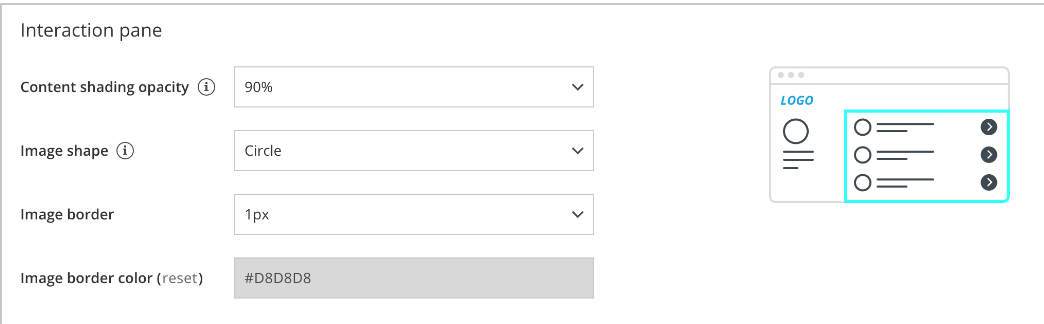


Figure 3: Interaction pane properties

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

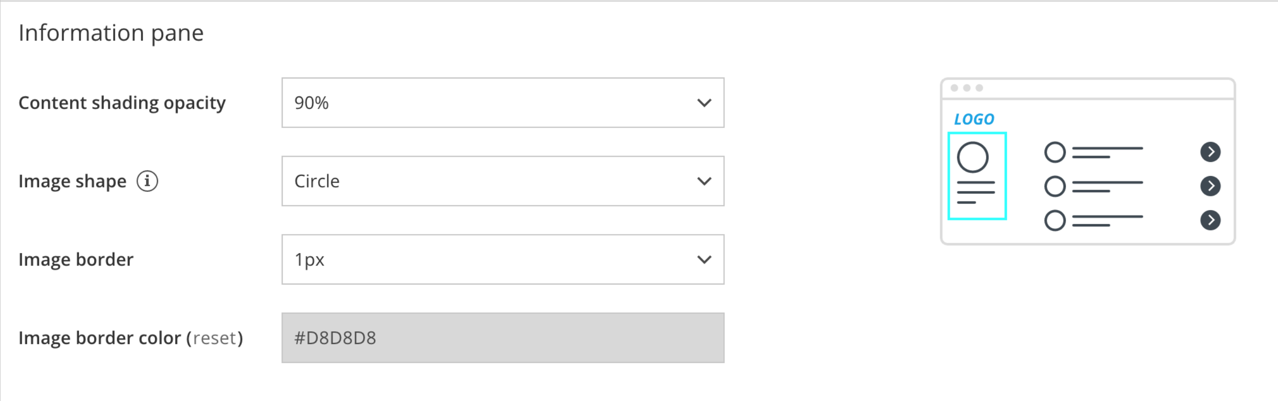


Figure 4: Information pane properties

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 [Classic]

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

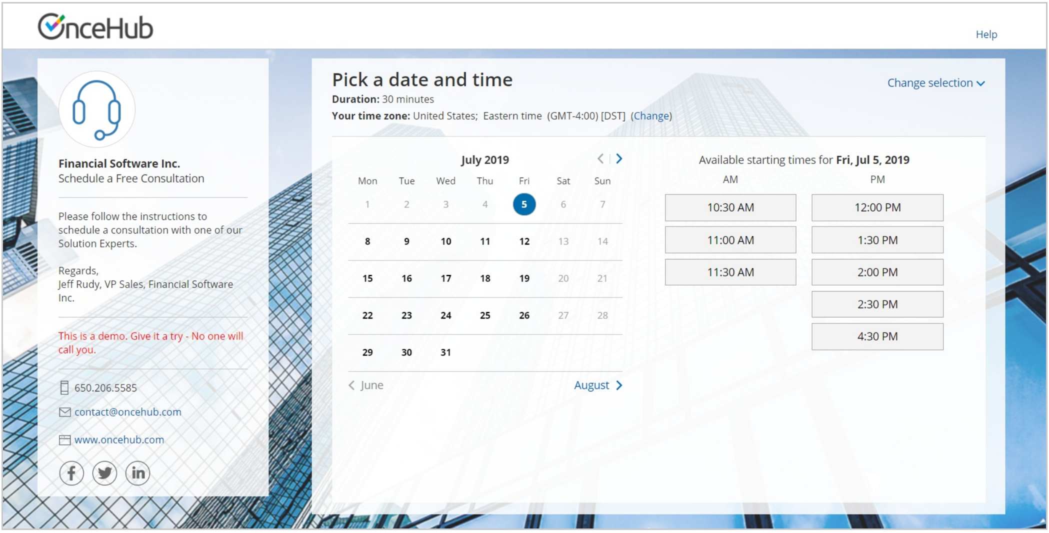


Figure 1: Booking page with OnceHub logo

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).

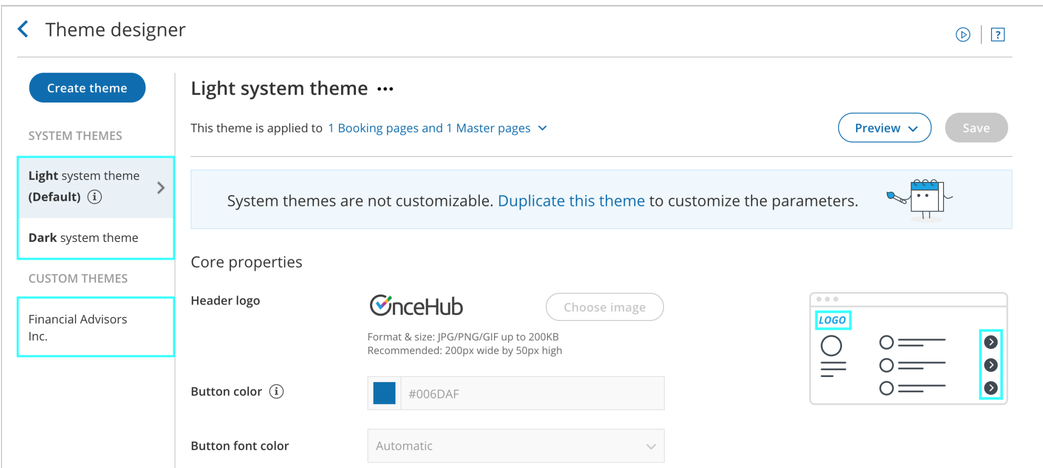


Figure 1: Selecting a theme

4. In the **Core properties** section, click the **Choose image** button (Figure 2).

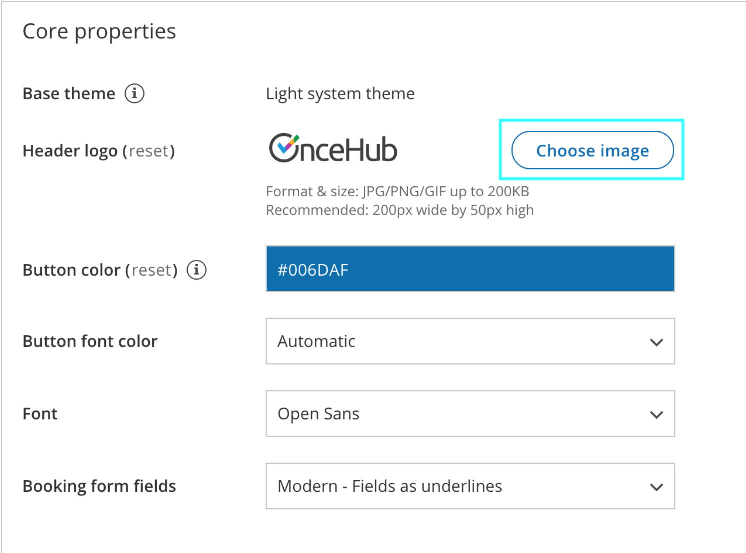


Figure 2: Choose an image for your Header logo

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 [Classic]

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).

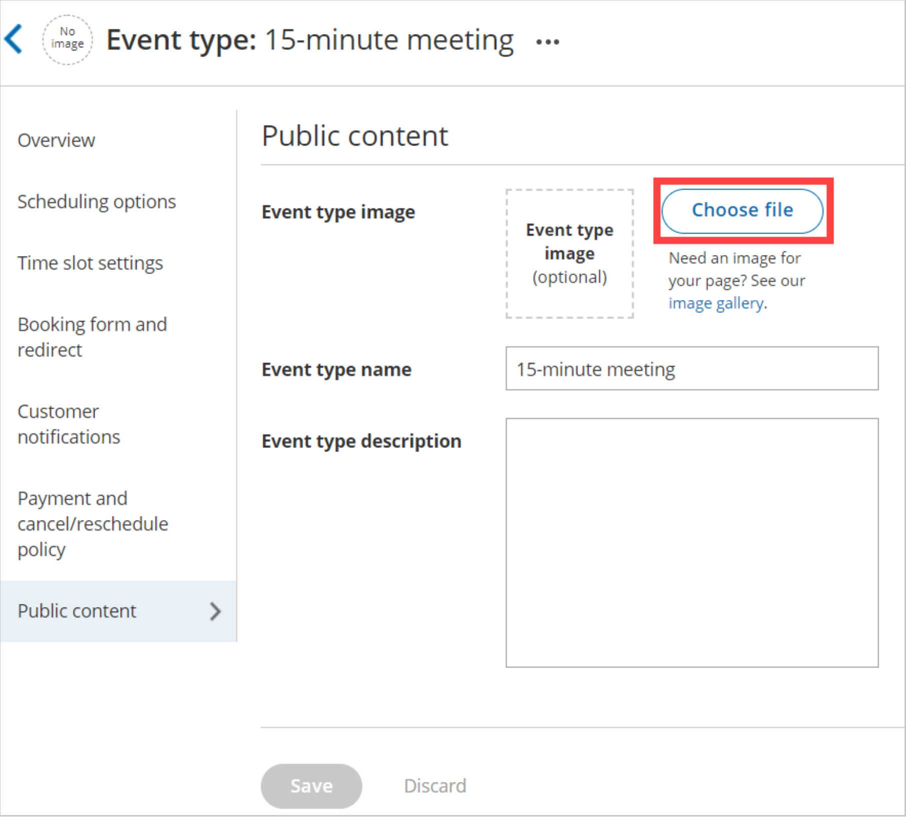
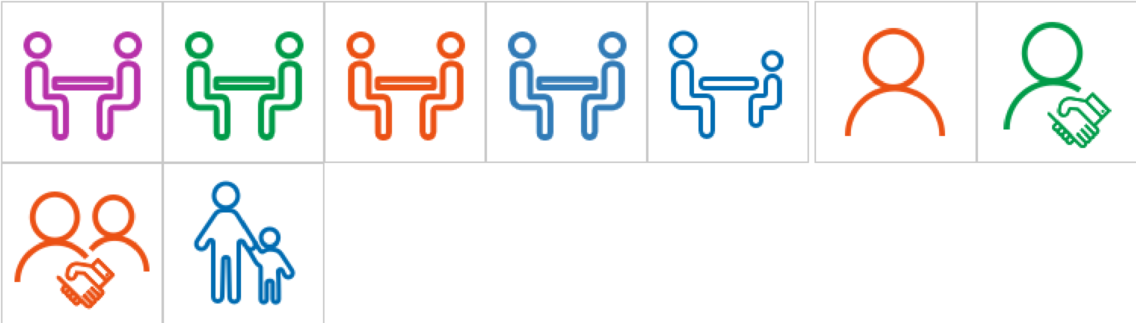


Figure 1: Event types Public content section

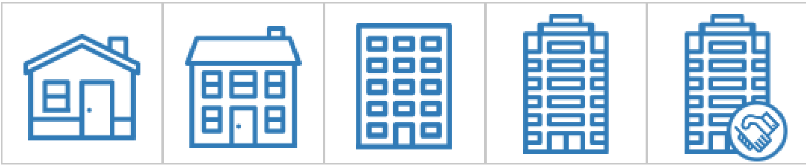
Image gallery

Phone meeting

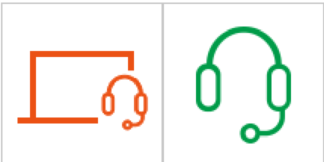

Face-to-face meeting



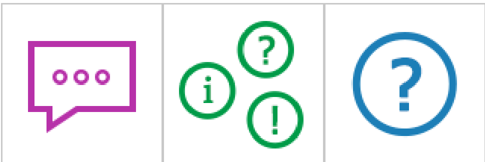
Office meeting



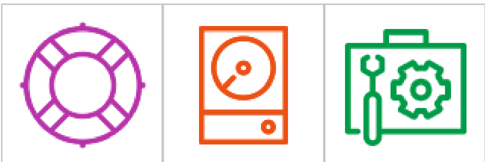
Web conference



Inquiries

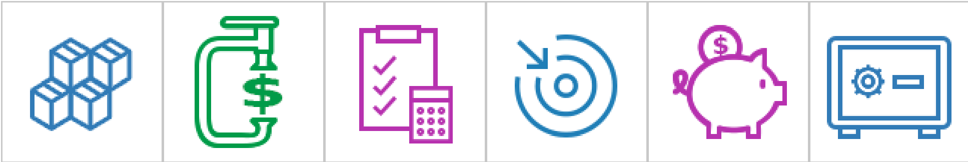


Technical Support



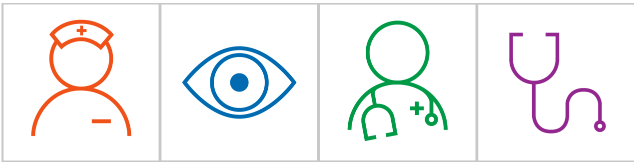
Coaching

Sales/Financial



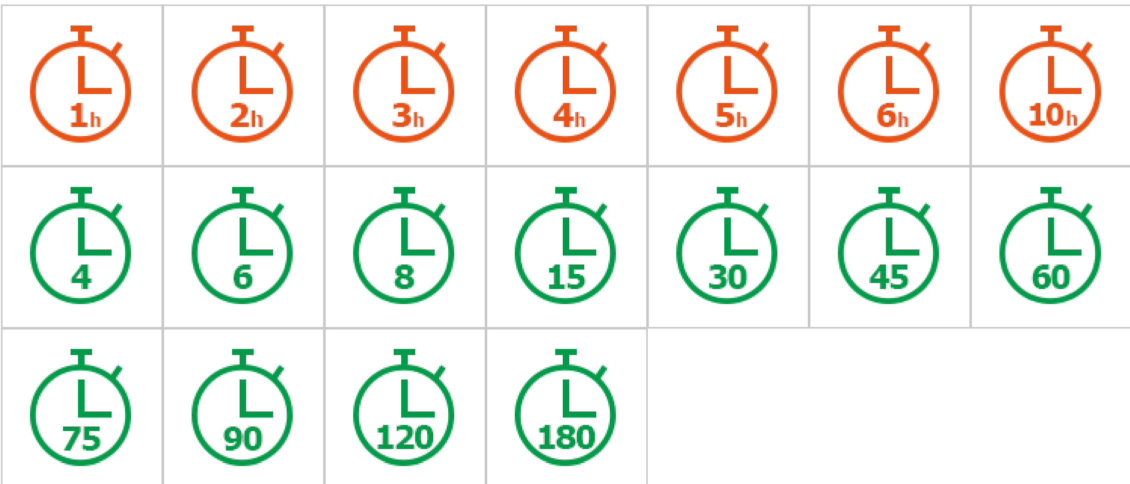
Education/eLearning

Health and medical

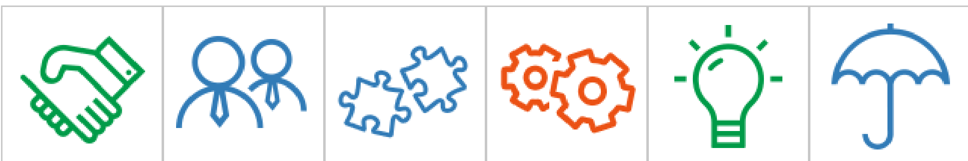


Geographic regions

Duration



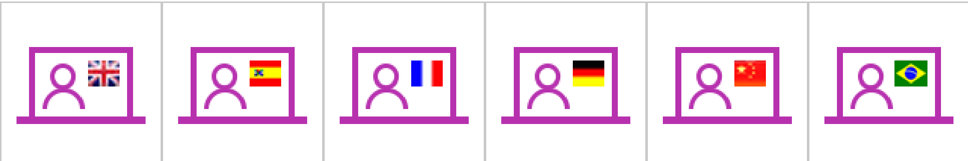
Miscellaneous



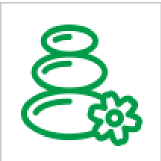
Legal

Conference rooms

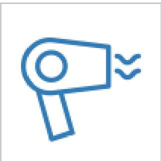
Language tutoring



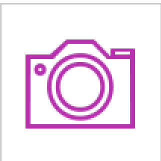
Massage



Hair Salon



Photographer



Are you looking for other icons for your Booking or Master pages? Please let us know.

Introduction to the Booking forms editor [Classic]

Booking forms allow you to collect information from your Customers when they make a booking. You can use the Booking forms editor to customize the information that you want to collect from your Customers during the booking process.

The Booking forms editor is an advanced WYSIWYG (What You See Is What You Get) editor. You can choose the questions on the Booking form and the order that they're presented in, giving you complete control over your Customer's booking experience.

Creating and editing Booking forms

All OnceHub Administrators can access the Booking forms editor. On the **Booking page** on the left, select the **Booking forms editor** on the left.

You can edit the Default Booking form (Figure 1), create a new Booking form, or copy and edit an existing Booking form. When you create a Booking form, you can edit, add, and remove the content in the middle editing pane.

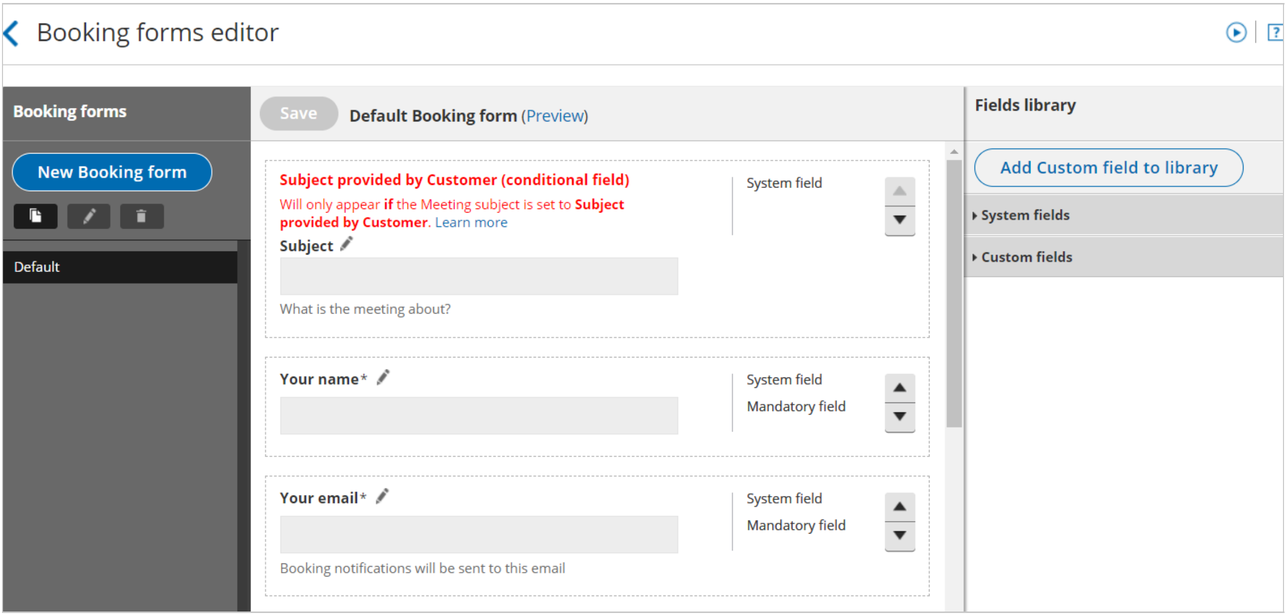


Figure 1: The Booking forms editor

Learn more about creating and editing a Booking form

The Fields library

The Fields library pane contains all of the fields available to be used on the Booking form. This is where you add fields to your Booking form and create your own Custom fields.

- **System fields:** System fields include seven standardized fields that are included on every new Booking form by default. Learn more about System fields
- **Custom fields:** If you want to collect information that isn't covered in the System fields, you can use one of OnceHub's out-of-the-box Custom fields, or create your own Custom field. Learn more about Custom fields

Using information collected on your Booking form

The information you collect on the Booking form can be used in the following ways.

Personalize email and SMS notifications to Users and Customers

When a Customer makes a booking, an email is sent to you with the Customer's name, their email address, and any other information from other fields that you chose to include on the Booking form.

The Customer will receive a personalized confirmation email with the details of the appointment they've just made. You can use data collected on the Booking form to create custom notifications.

Learn more about creating custom email or SMS templates

Customize reports

All data collected via the Booking form is available in your reports. You can select the fields you want to display in any Detail report in the **Reports** section of the left.

Updating your CRM by mapping specific System or Custom fields to your CRM's fields

If you use our Salesforce or Infusionsoft integration, you can map System and Custom fields to the corresponding fields in your CRM.

Learn more about viewing collected information from your Booking form

Creating and editing a Booking form [Classic]

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).

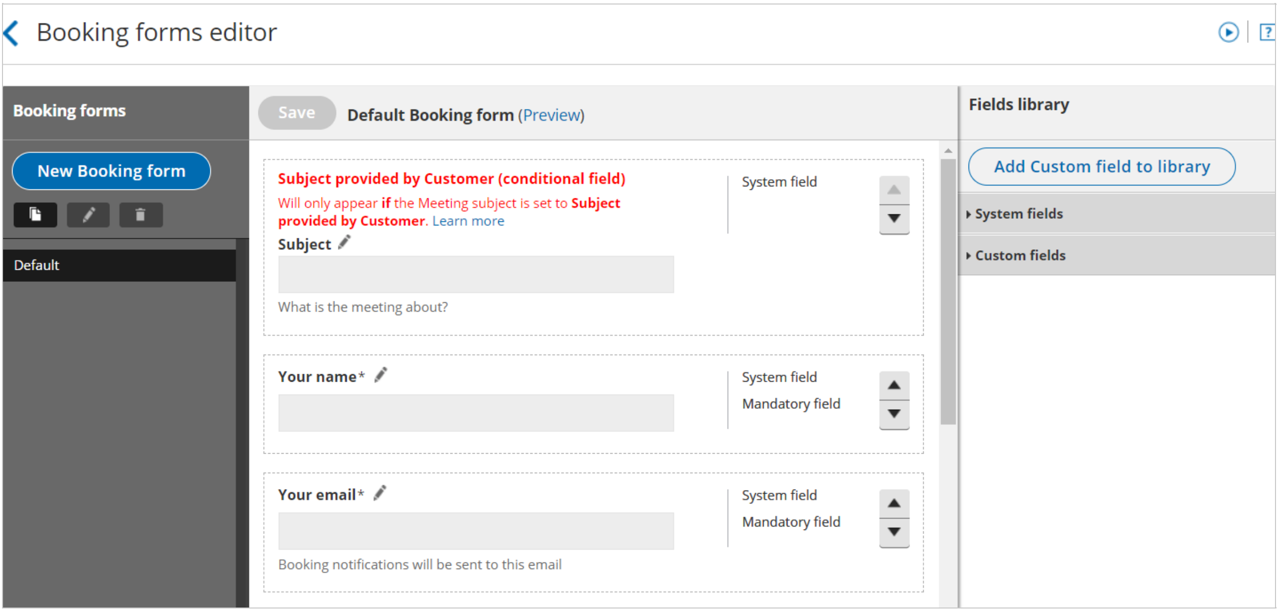


Figure 1: Default Booking form

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.

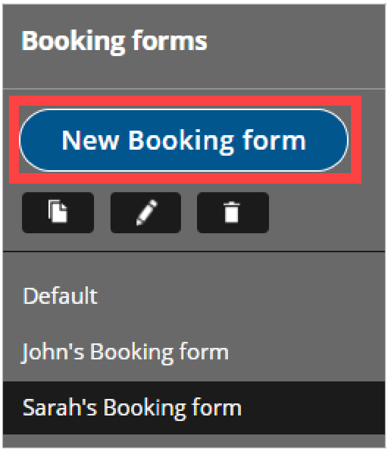


Figure 2: New Booking form button

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.

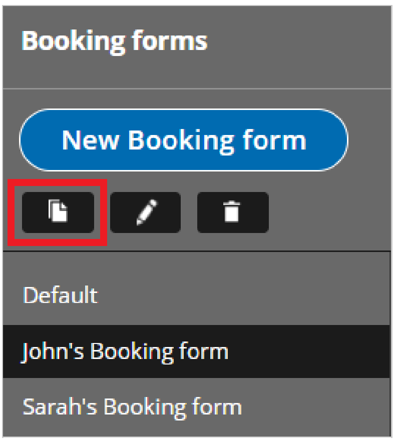


Figure 3: Copy an existing Booking form

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).

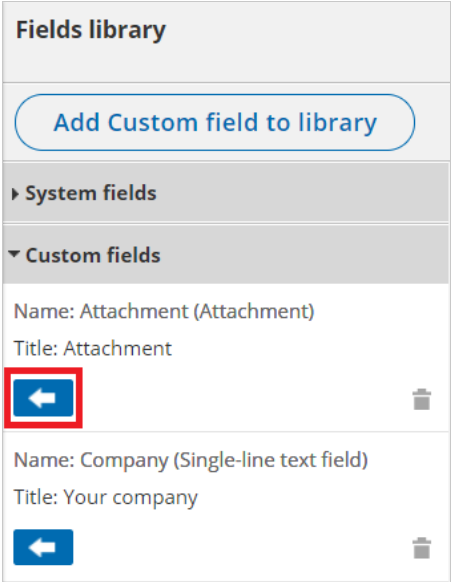


Figure 4: Add fields to your Booking form

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).

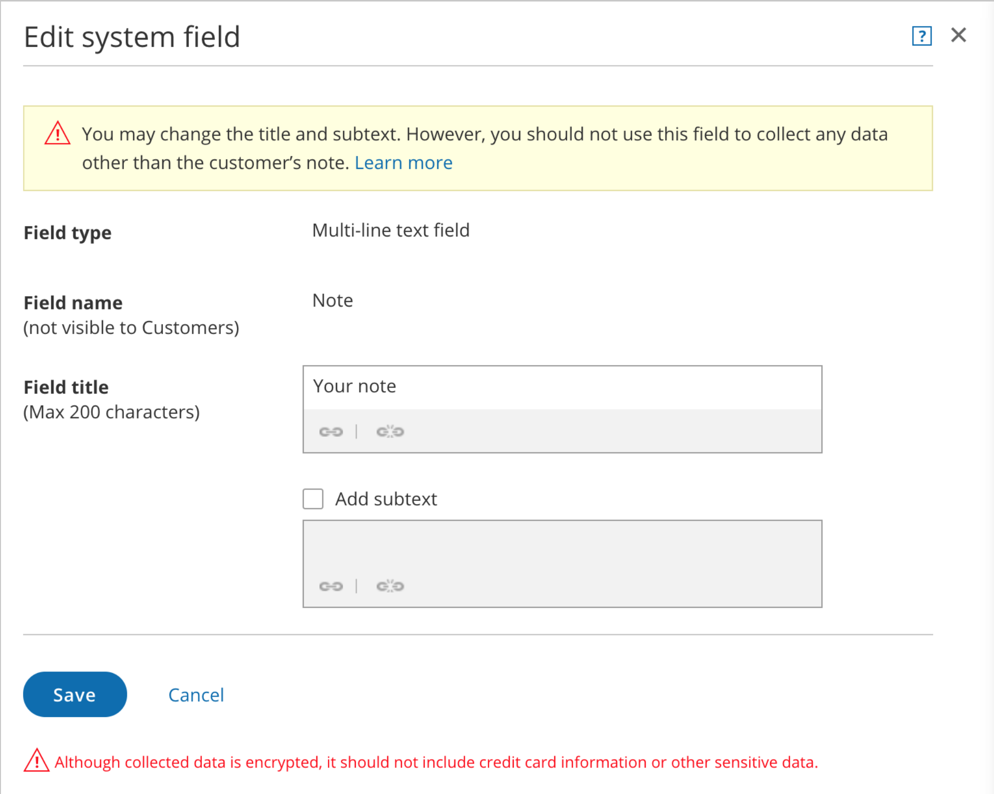


Figure 7: Edit field pop-up

- **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).

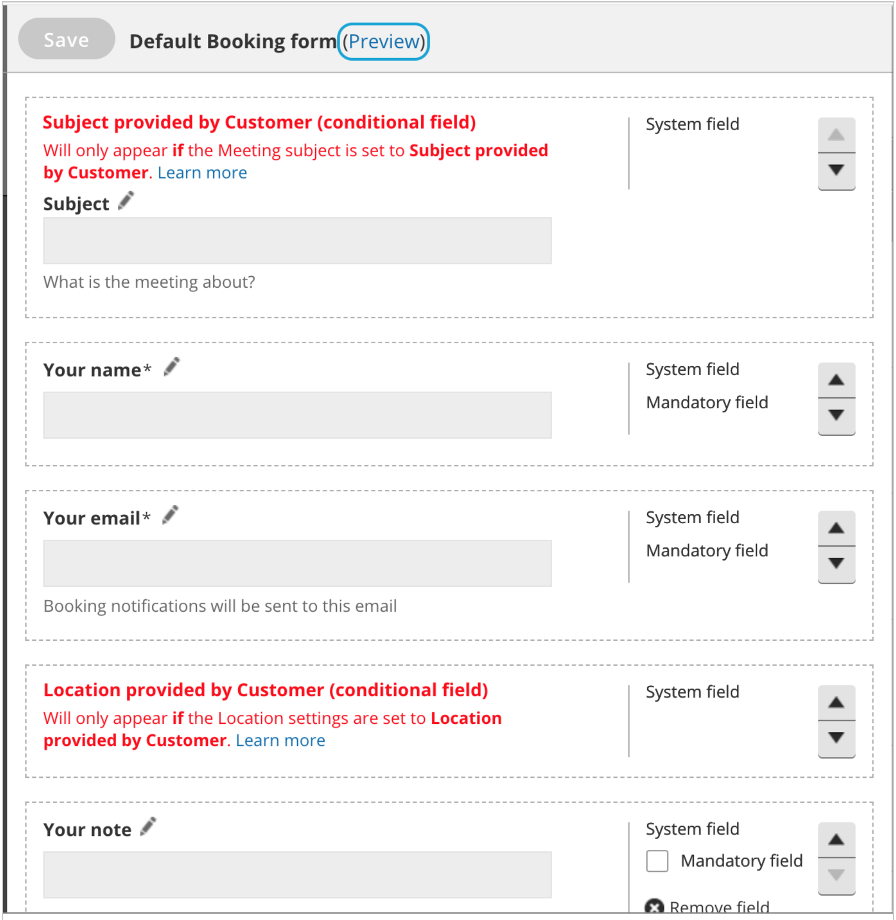


Figure 9: Click Preview to see a preview of your Booking form

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.

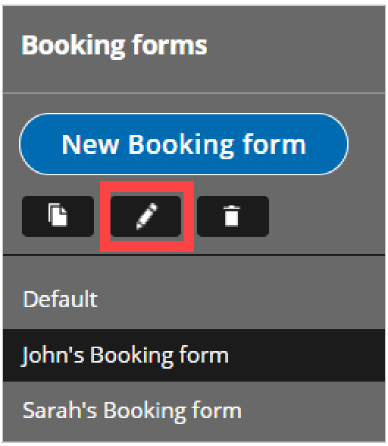
  

  Figure 10: Rename button

- **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.

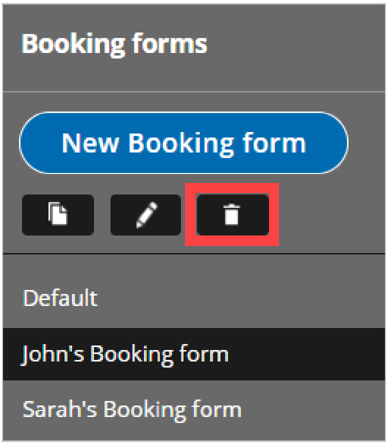


Figure 11: Delete button

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.

Editing System fields [Classic]

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

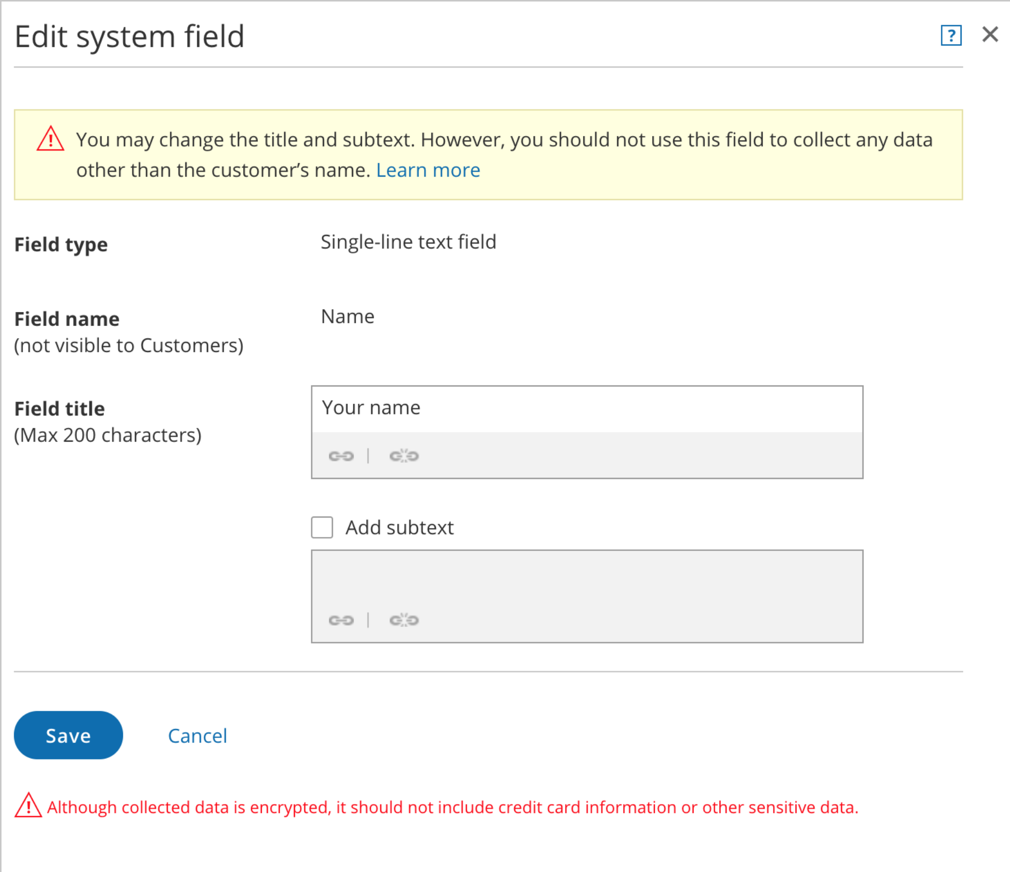


Figure 2: Edit system field pop-up

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.

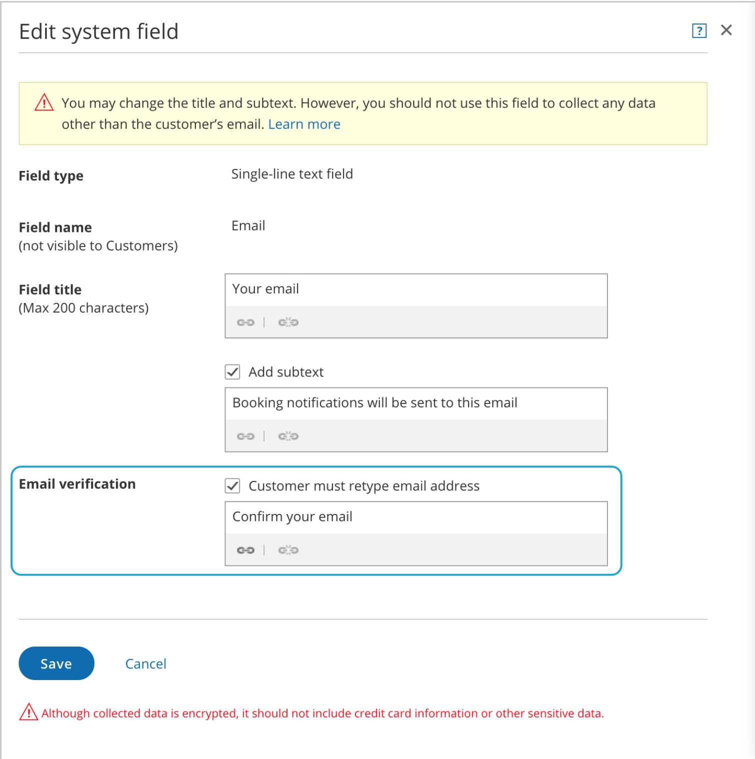


Figure 3: Require email verification for the email System field

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.

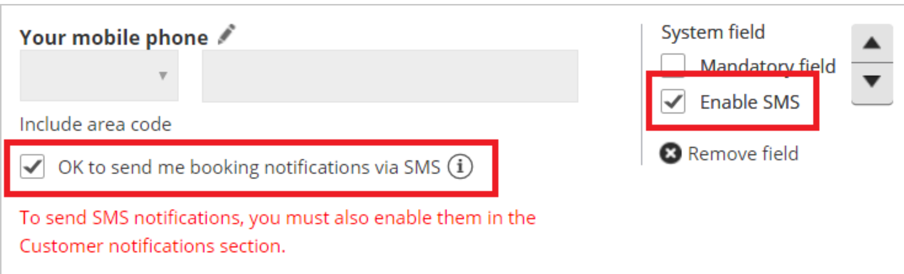


Figure 3: Enable SMS notifications for the Mobile phone System field

When you enable this option, your Customers will be asked to opt-in to receiving SMS notifications in the Booking form.

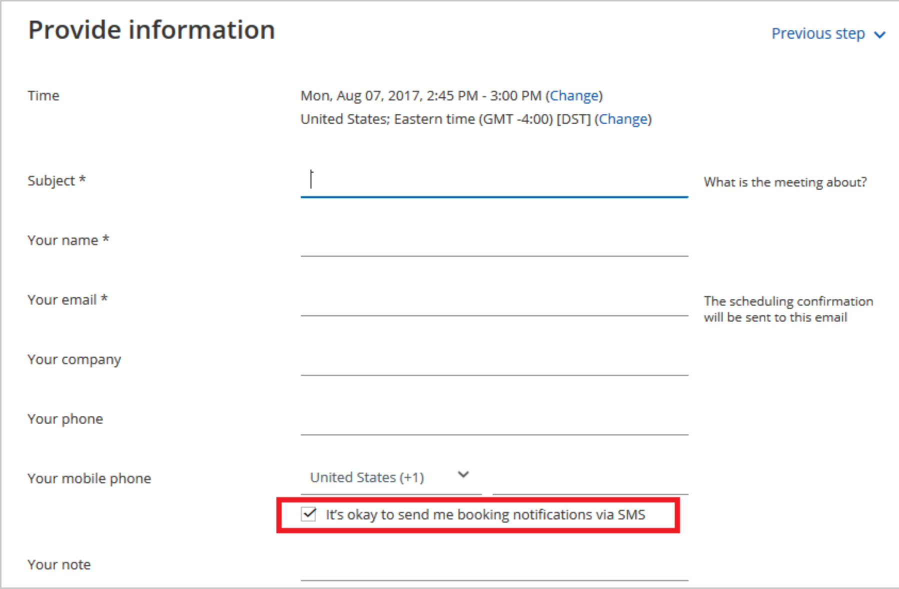


Figure 4: Customers opt-in to receiving SMSs in the Booking form

When this option is enabled and your Booking form is skipped, the checkbox will appear in the date and time selection step.

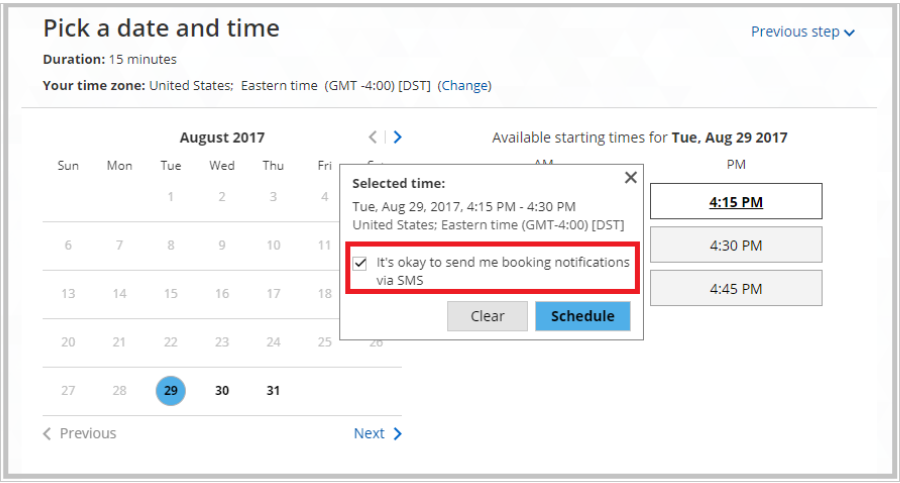


Figure 4: Opt-in to receive booking notifications via SMS

Creating and editing Custom fields [Classic]

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).

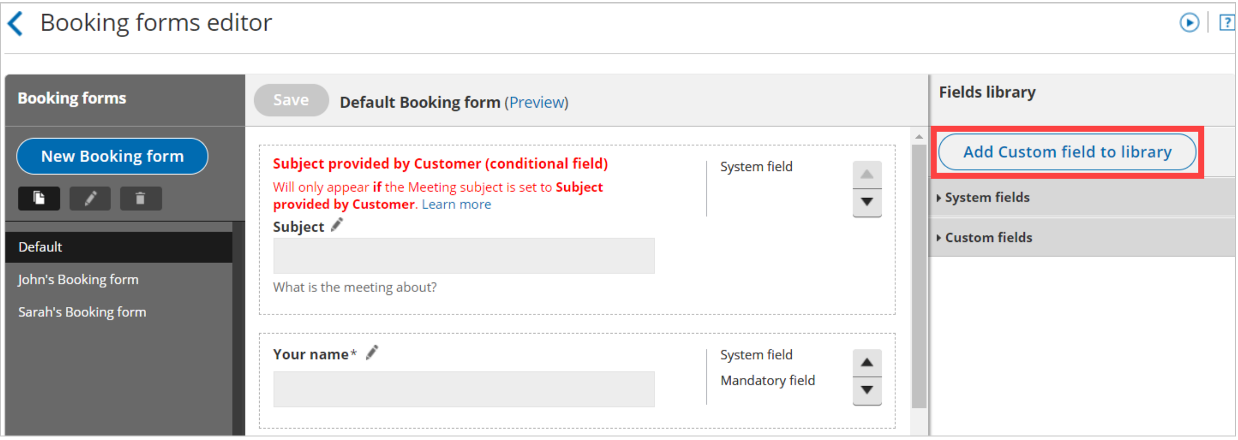


Figure 1: Add Custom field to library button

4. The **Add Custom field to library** pop-up will open (Figure 2).

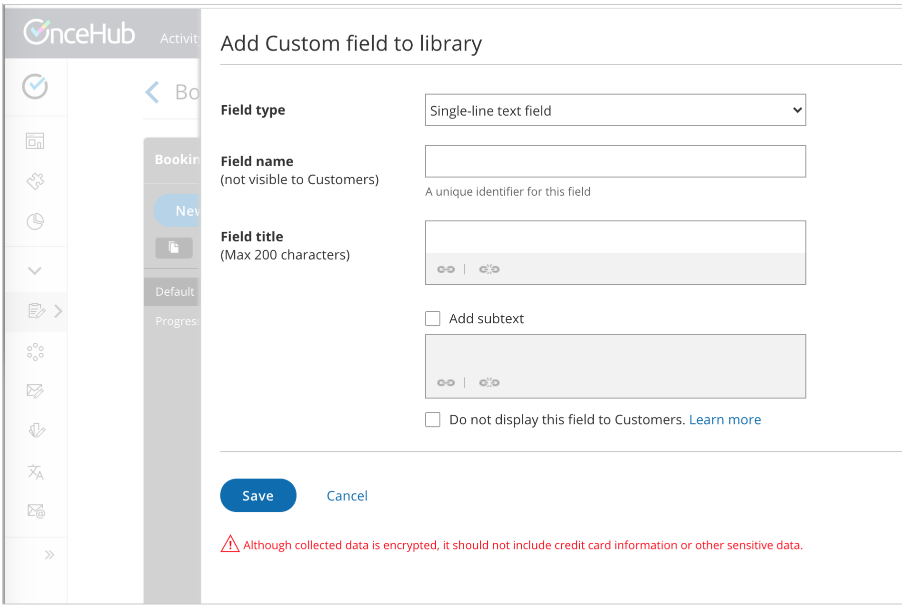


Figure 2: Adding a Custom field

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.

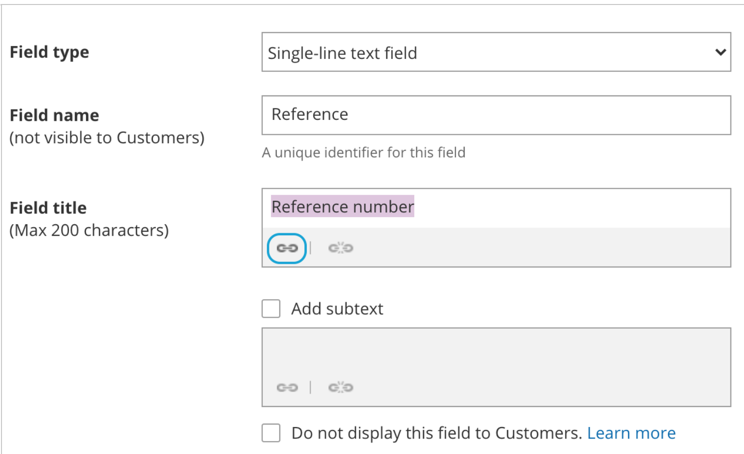


Figure 3: Link icon

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).

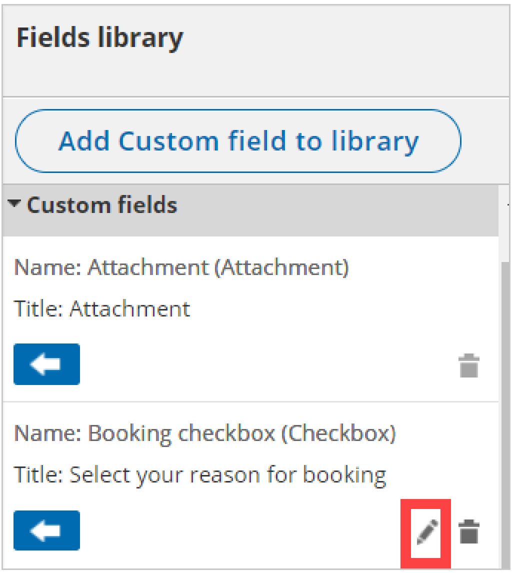


Figure 4: Edit icon next to your Custom field

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.

Conditional fields [Classic]

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**.

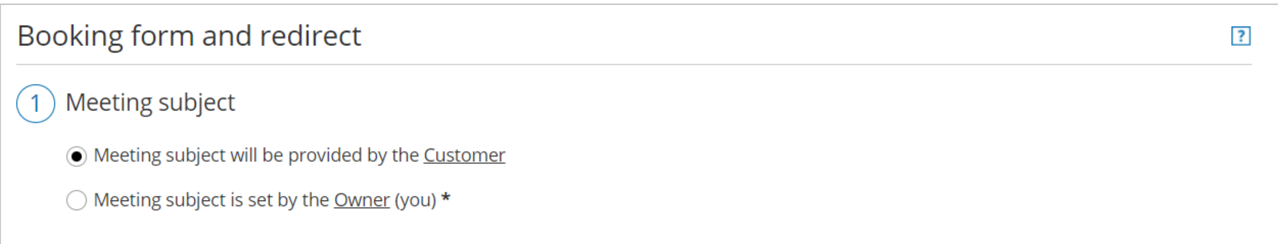


Figure 1: Meeting subject will be provided by the Customer

Location

You can customize the location of your meeting in the **Conferencing / Location** section of your Booking page (Figure 2).

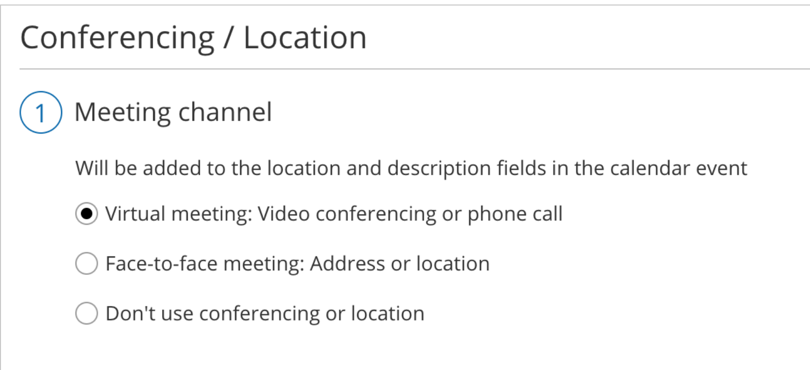


Figure 2: Booking page Conferencing / Location section

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 [Classic]

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).

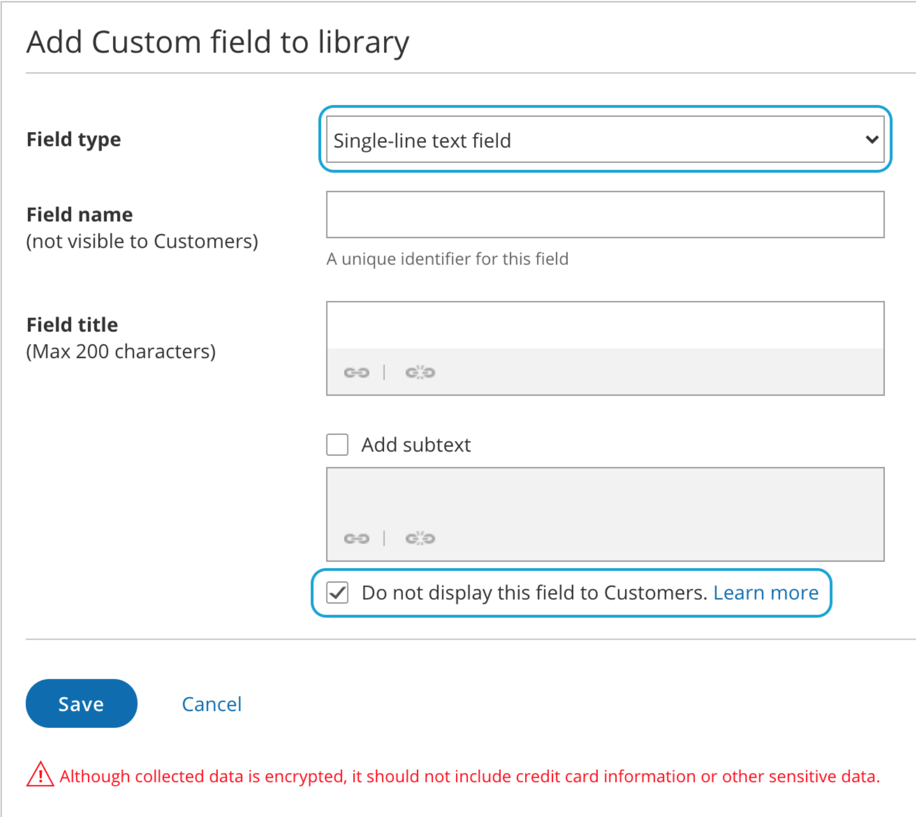


Figure 1: Creating a hidden Custom field

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

Secure attachments [Classic]

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.

The Fields library [Classic]

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

Mapping Booking Page Custom Fields to Contact Fields [Classic]

Each Custom field that you create for your Booking Forms can be mapped to a Contact field to save the corresponding guest responses within a OnceHub Contact.

For information on creating Contact Fields, please take a look at our **Contacts in OnceHub article**.

Mapping a Question to a Contact Field

Define which fields in a Booking Form should save to a Contact field, and these preferences will be carried over to all Booking Pages and Event Types using it.

1. Open the **Booking forms editor** on the left hand panel.
2. Expand **Custom fields** on the right hand side.
3. Click the pencil icon of the custom field you want to save to a Contact field
4. Select **In the booking and as a contact field**.
5. Click on **Save**.

Introduction to the Notification templates editor [Classic]

When a Customer makes a booking, both the Customer and User receive notifications relevant to that booking. The Notification templates editor allows you to edit notifications so that Customers and Users receive fully customized email notifications and SMS notifications.

The Notification templates editor is an advanced WYSIWYG (What You See Is What You Get) editor that allows you to:

- Review the structure of default templates (when no customization is required).
- Edit the content and look and feel of notifications.
- Create new Custom templates.
- Add a logo to your notifications.
- Translate a Custom template to another language as part of localization.

When your templates are ready, you can use them for Customer and User communications. The templates can be used for:

- Customer notifications
- User notifications
- Sending invitations to new Users

Selecting a notification scenario

When you open the Notification templates editor, you'll be asked to select a notification scenario. Notification scenarios are events that take place during a booking lifecycle which trigger emails and SMS to be sent.

You can also use the **Notification scenario** dropdown menu (Figure 1) to select the notification scenario you want to edit.

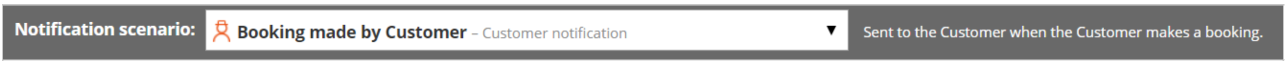


Figure 1: Notification scenario dropdown menu

There are different scenarios for Users and Customers, each with their own templates. OnceHub provides out-of-the-box templates for more than 30 different notification scenarios.

Learn more about notification scenarios

Creating or editing a notification template

All OnceHub Administrators can access the Notification templates editor. Go to **Booking pages** in the bar on the left. Select the **Notification templates editor** on the left.

Learn more about creating custom email and SMS templates

You can edit default notifications templates (Figure 1), create a new Custom notification template, or copy and edit an existing notification template. When you create a Custom notification template, you can edit, add, and remove the content in the middle editing pane.

Learn more about default vs. custom templates

Note:

Default templates cannot be edited, but they can be copied.

Email and SMS tabs

Under most scenarios there is an email tab and SMS tab. You can use these to choose which notification type you wish to work on.

- If you see a **blue icon** with a **D**, it means you are viewing the default template.
- If you see a **red icon** with **C**, it means you are viewing a Custom template.

The default template cannot be edited; the Custom templates can be.

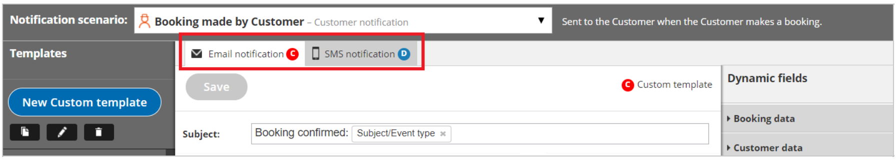


Figure 2: Email notification and SMS notification tabs

Dynamic fields pane

This is where you can find the Dynamic fields to add variable content to your template. Dynamic fields are used in emails and SMS to personalize the message for the User or Customer and to give booking-specific information.

Dynamic fields will be automatically populated with the data generated throughout the booking process and from your booking settings. For example, if you want to include the name of your Customer in the greeting of your Customer emails, insert the Dynamic field “Customer name” and the greeting field will always start with “Dear <Customer name>”, inserting your Customer’s actual name.

Learn more about Dynamic fields

Note:

Dynamic fields such as time zone, country, and location, are shown in English in all notifications except Customer notifications based on custom templates - in this case these Dynamic fields are shown in the locale selected on the Booking page.

Should I use a Default or Custom template? [Classic]

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 [Classic]

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.

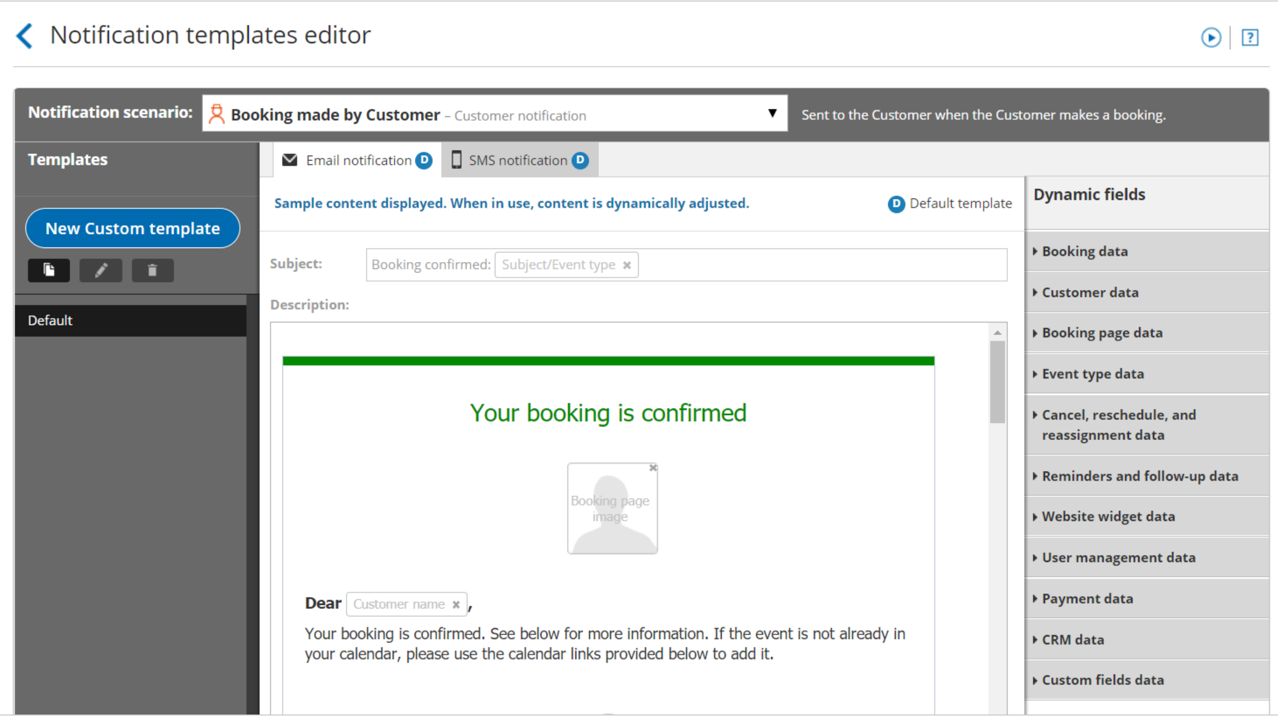


Figure 1: Notification templates editor

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

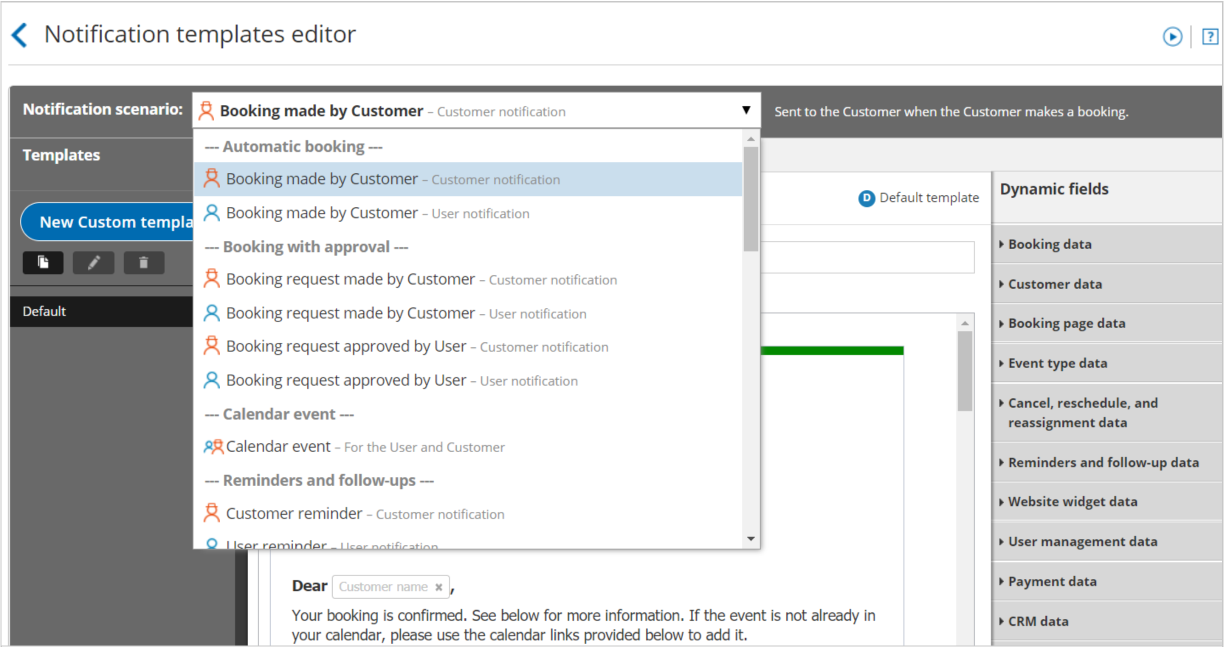


Figure 2: Notification scenarios drop-down menu

2. Click the **New Custom template** button in the left pane (Figure 3).

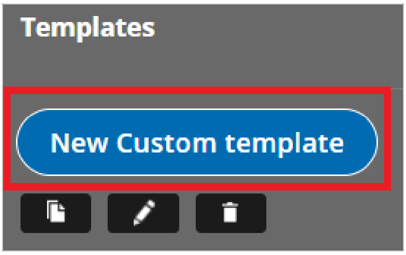


Figure 3: Click the New Custom template button

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).

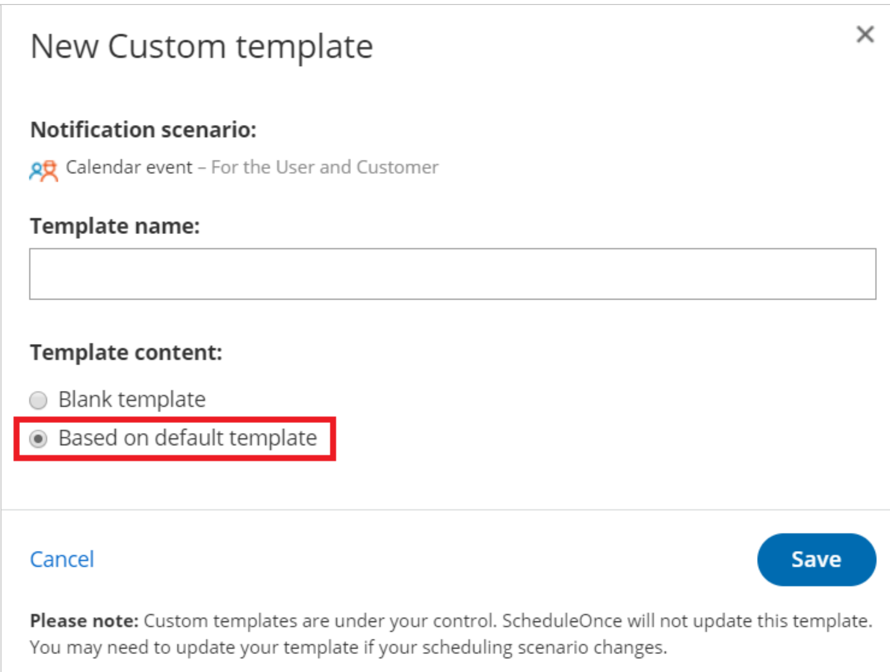


Figure 4: New Custom template pop-up

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).

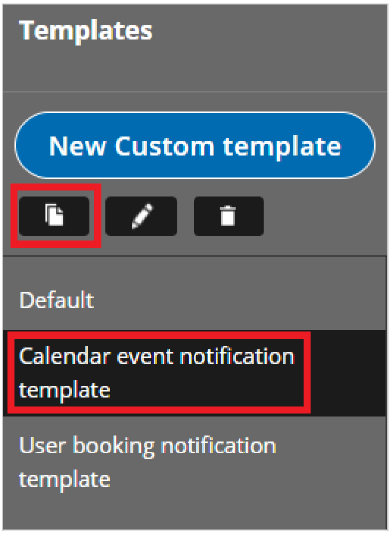


Figure 5: Copy an existing template

3. In the **Copy template** pop-up, use the drop-down menu to select the Notification scenario you want to use the template for.

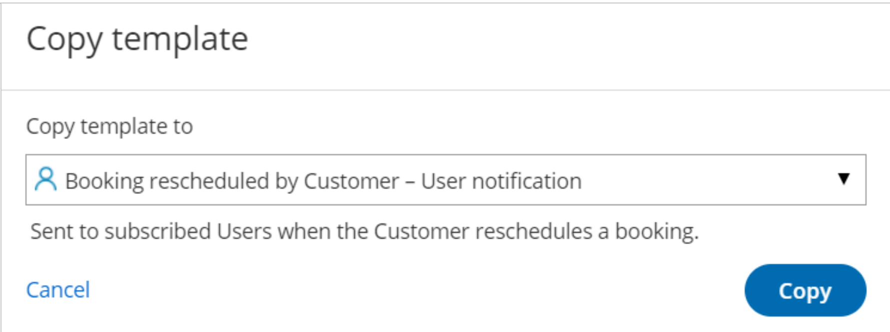


Figure 3: Copy template pop-up

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**.

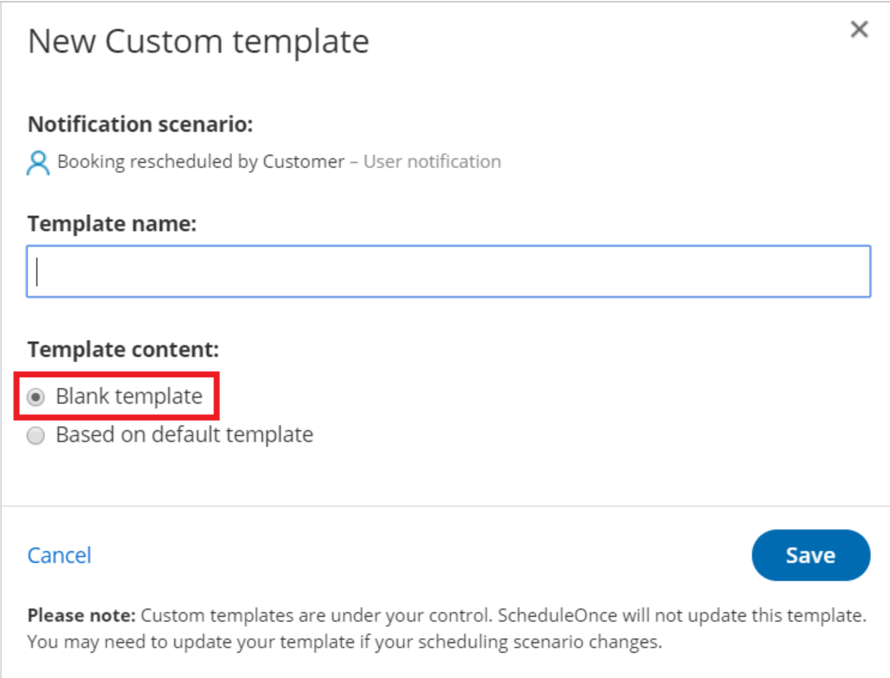


Figure 4: New Custom template pop-up

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).

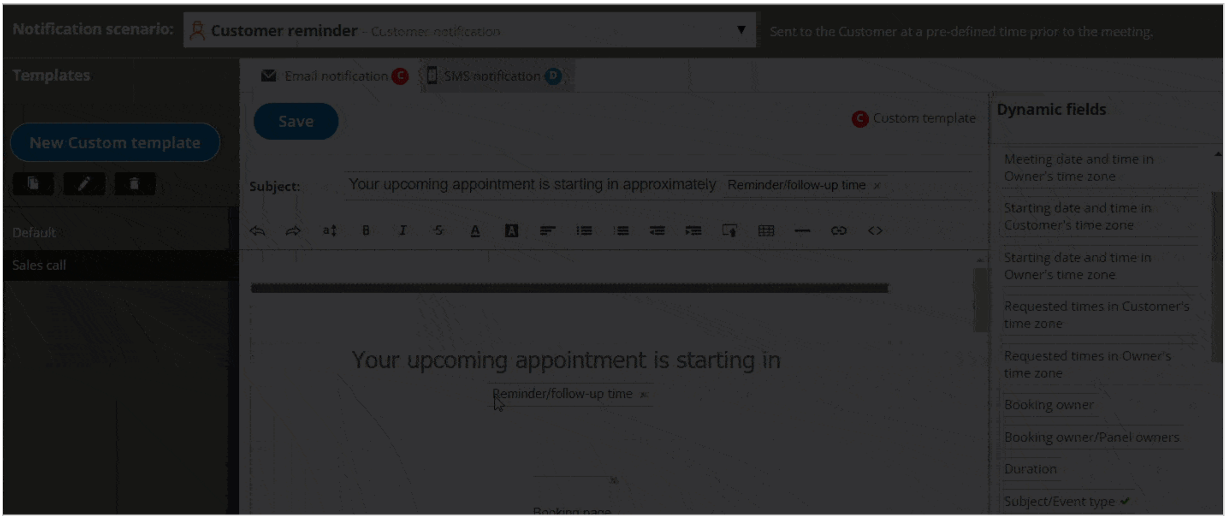


Figure 5: Place the cursor in the template editor text box

2. In the **Dynamic Fields** column on the right, click the Dynamic field you want to add (Figure 6).

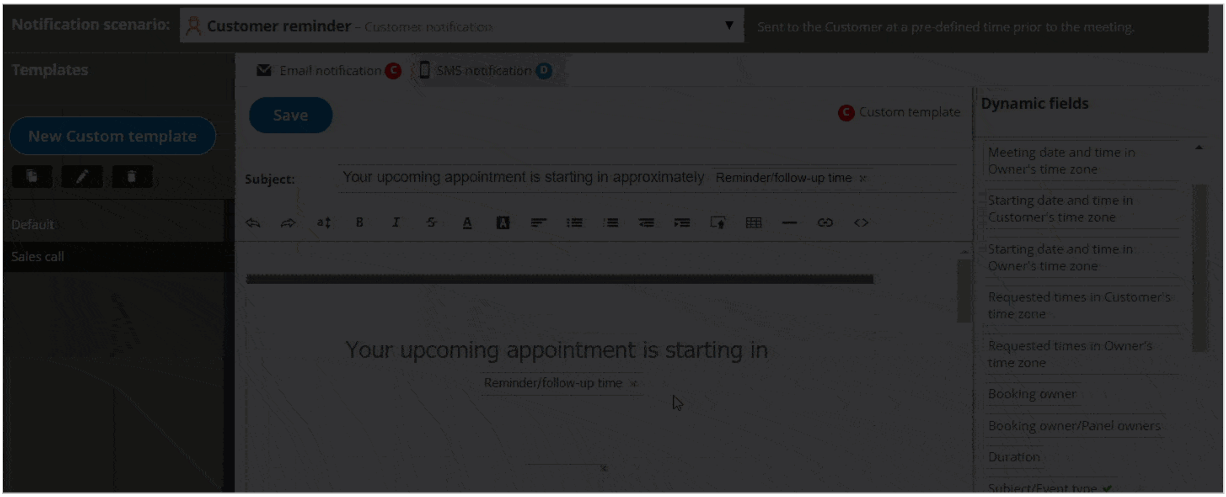


Figure 6: Add a Dynamic field

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.

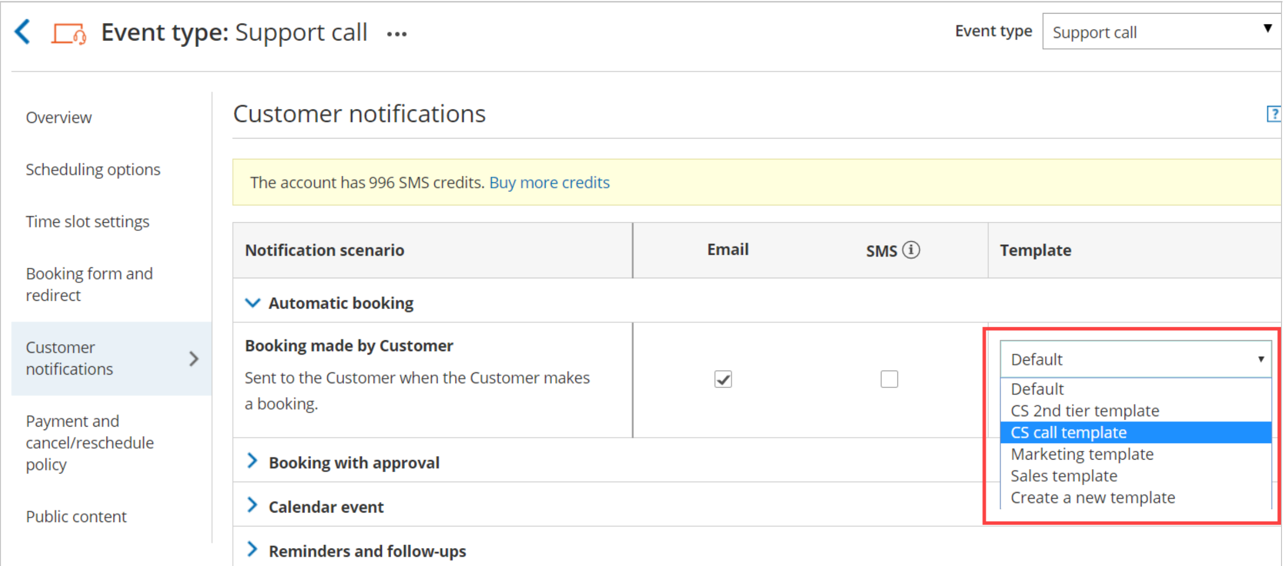


Figure 6: Template drop-down menu

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).

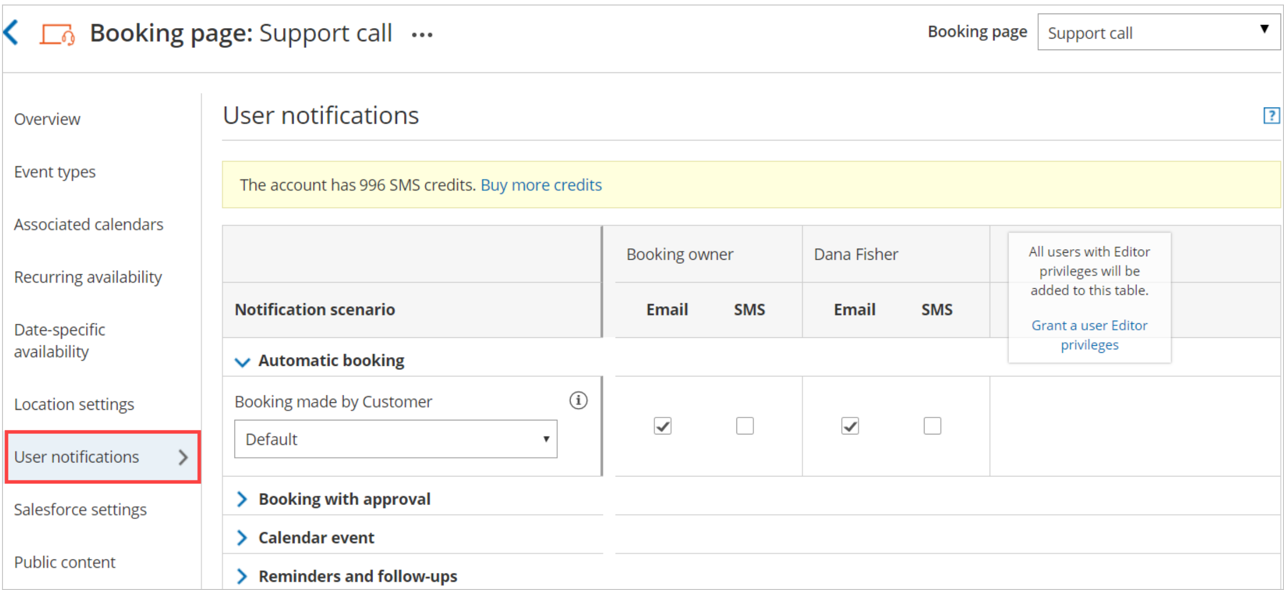


Figure 7: User notifications section

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**.

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**.

The WYSIWYG mode of the Notification templates editor [Classic]

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

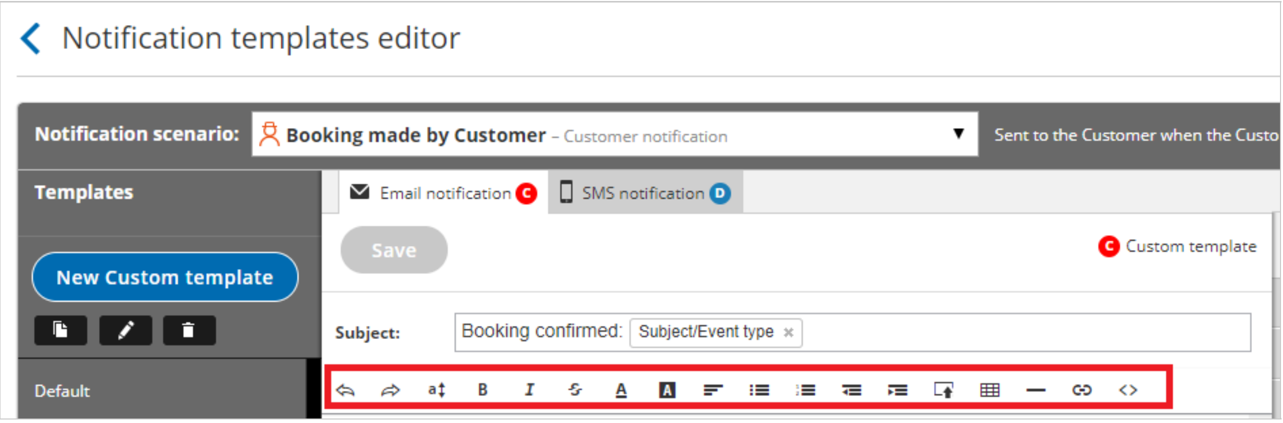


Figure 1: Edit functions in the Notification templates editor

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.

How to test a Custom notification template [Classic]

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).

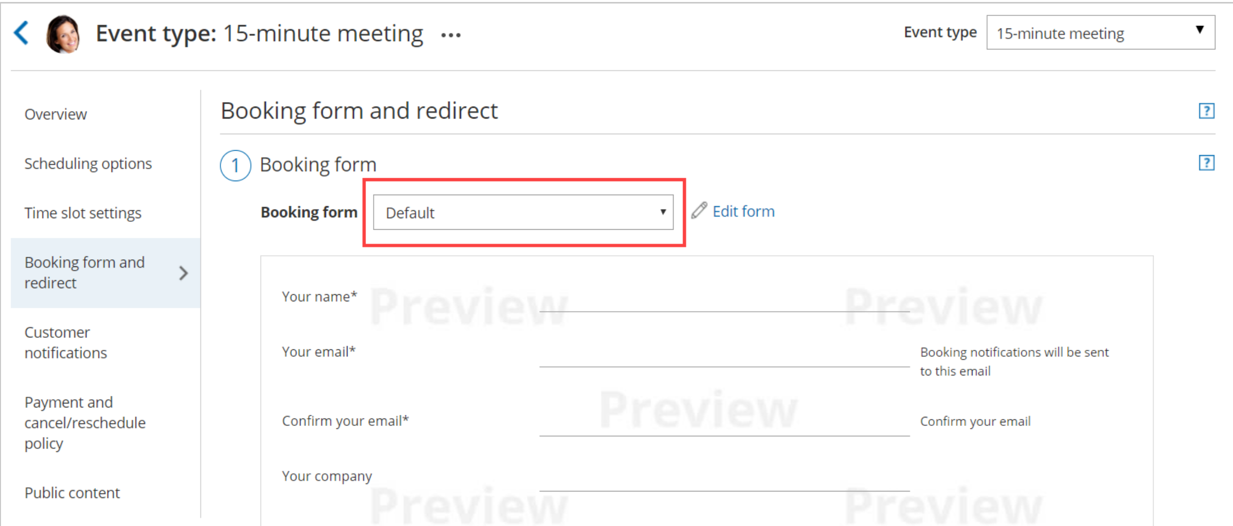


Figure 1: Selecting a Booking form template

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).

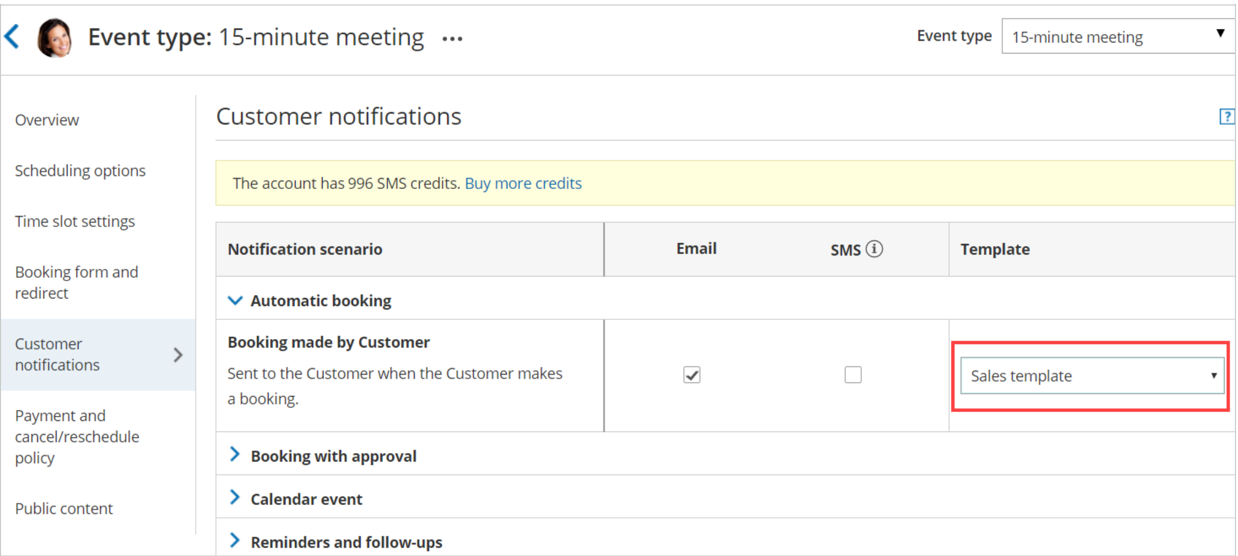


Figure 2: Choosing a Custom notification template for each Notification scenario

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).

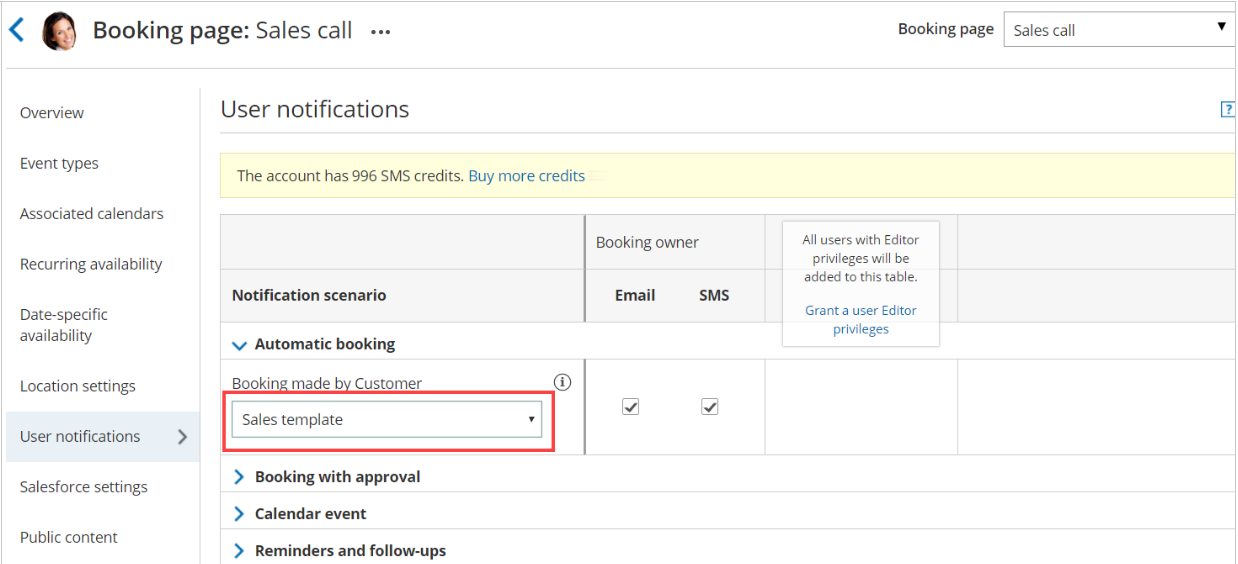


Figure 3: Choosing a Custom notification template for each Notification scenario

> **Note:**
>
> If you want to receive User SMS notifications, you'll need to enter a phone number in your Profile's SMS notifications section.

4. In the Booking page Overview section of your Booking page, click on the public link in the **Share & Publish** section.

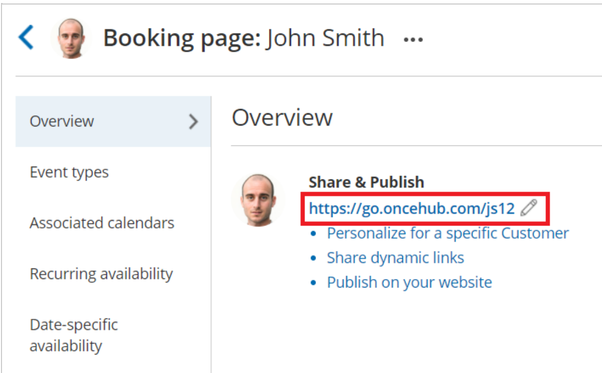


Figure 4: Booking page public link

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.

Dynamic fields [Classic]

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).

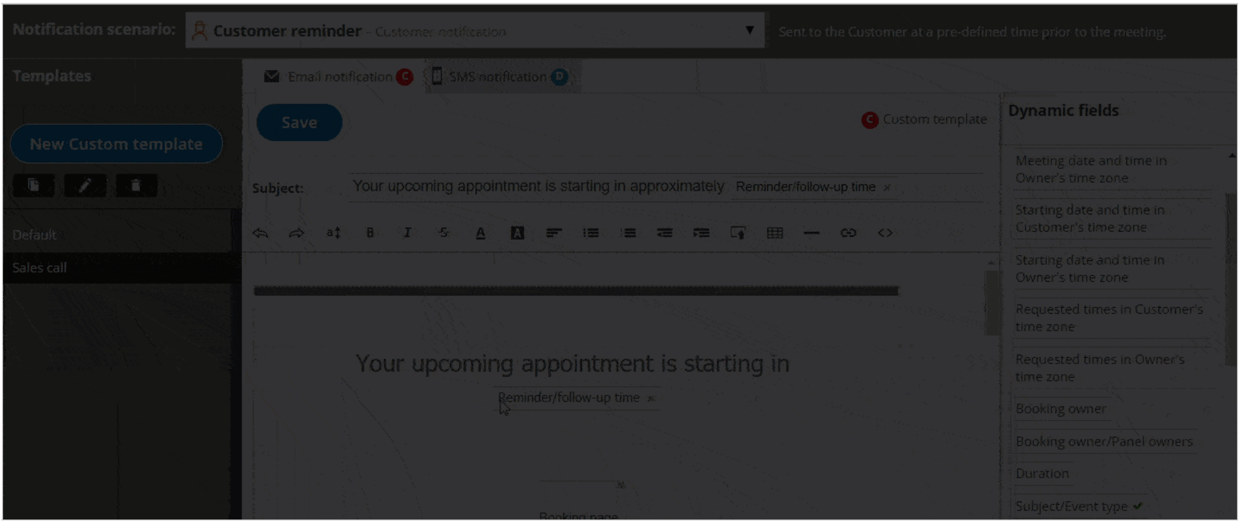


Figure 5: Place the cursor in the template editor text box

3. In the **Dynamic Fields** column on the right, click the Dynamic field you want to add (Figure 2).

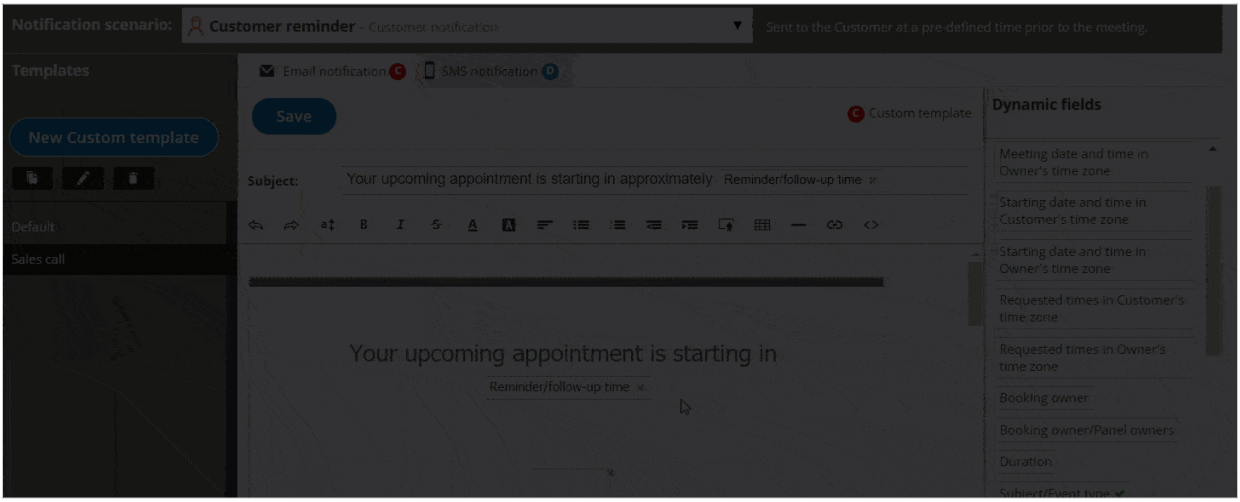


Figure 2: Add a Dynamic field

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.

Notification scenarios [Classic]

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.

Best practices for creating HTML templates [Classic]

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).

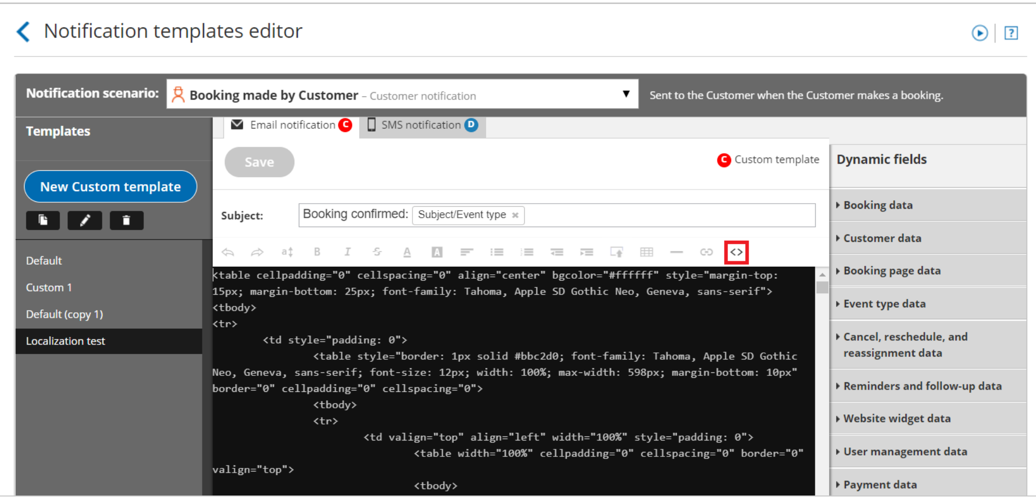


Figure 1: Accessing HTML mode

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.

Understanding localization and Customer interface text [Classic]

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

Editing Customer interface text [Classic]

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).

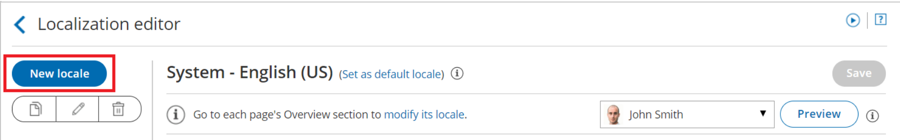


Figure 1: New locale button

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).

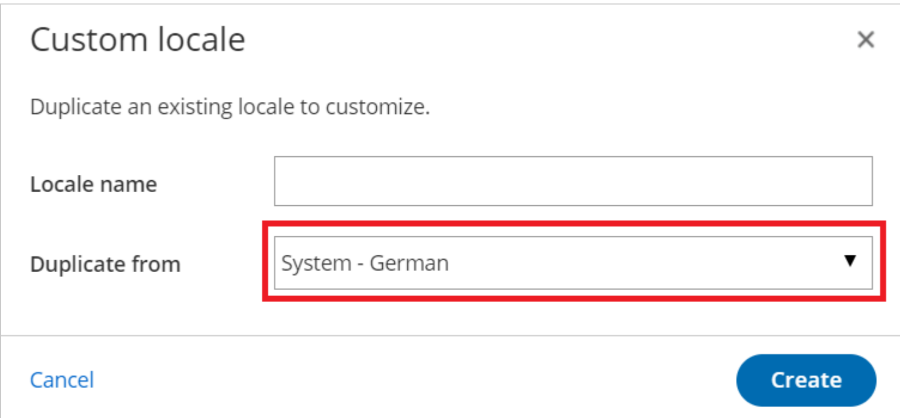


Figure 2: Custom locale pop-up

> **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.

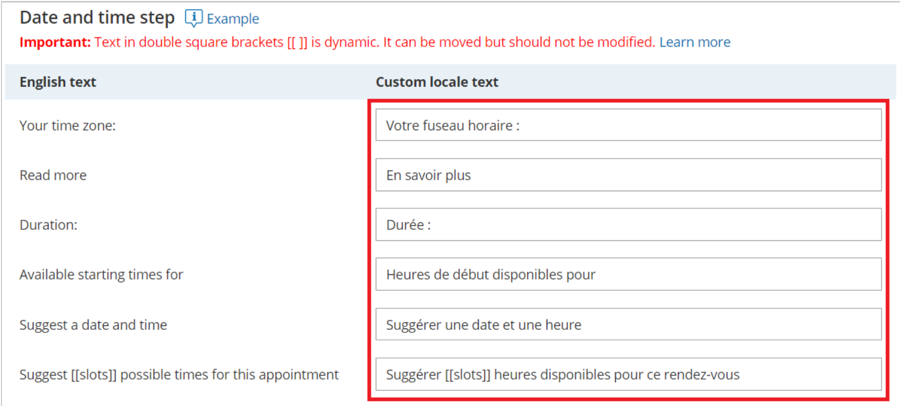


Figure 3: Custom locale text column

> **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.**

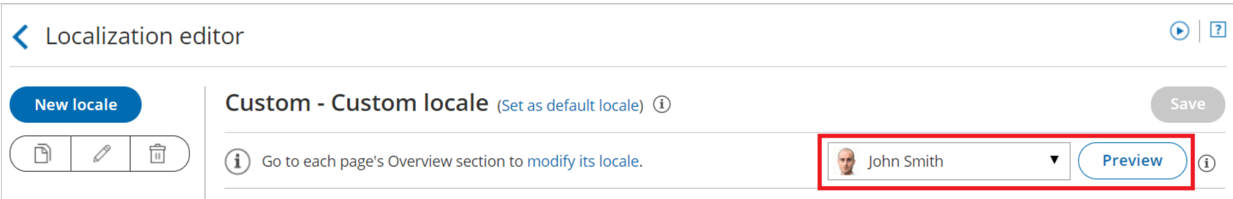


Figure 4: Locale Preview button

> **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

The Localization editor [Classic]

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).

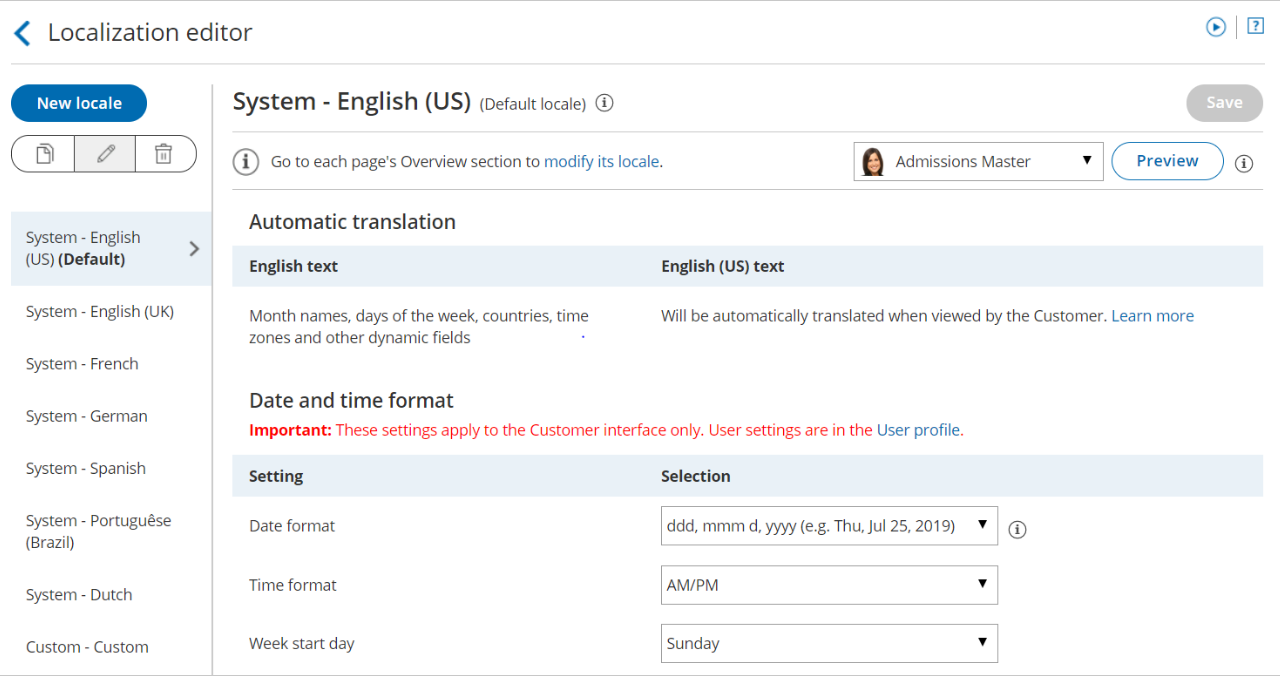


Figure 1: The Localization editor

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).

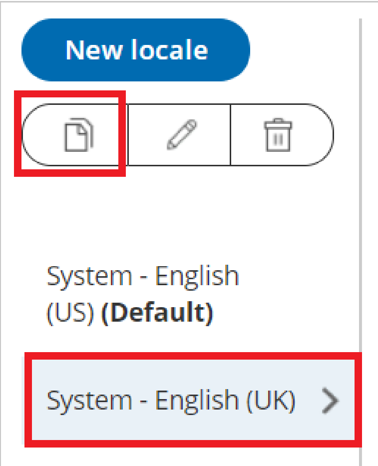


Figure 2: Click the Duplicate icon to duplicate a locale

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.

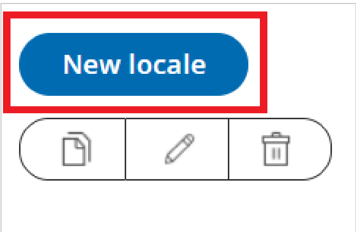


Figure 3: New Locale button

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).

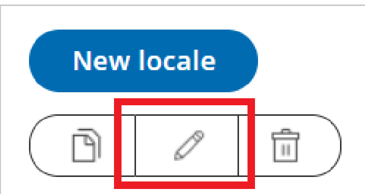


Figure 4: Rename locale button

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).

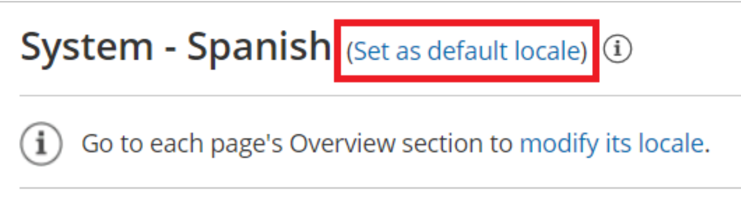


Figure 6: Set your default locale

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).

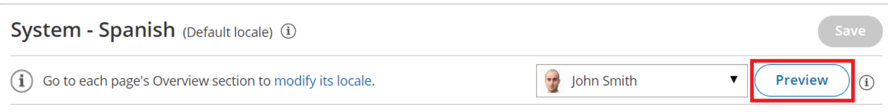


Figure 7: Preview button

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.

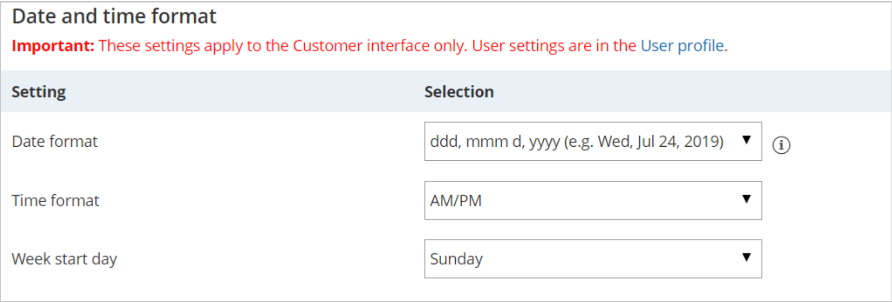


Figure 8: Date and time format settings

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 [Classic]

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).

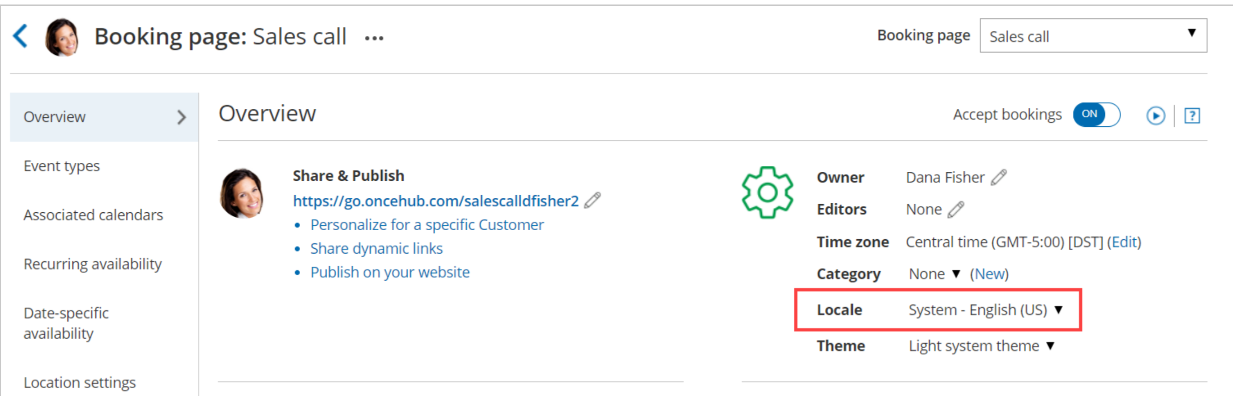


Figure 1: Selecting a Locale in the Booking page Overview section

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) .

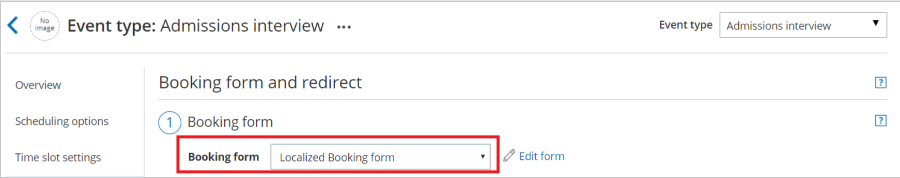


Figure 2: Selecting the edited Booking form

11. In the Payment and cancel/reschedule policy section, select the **Custom text** option and enter your policy in the appropriate language (Figure 3).

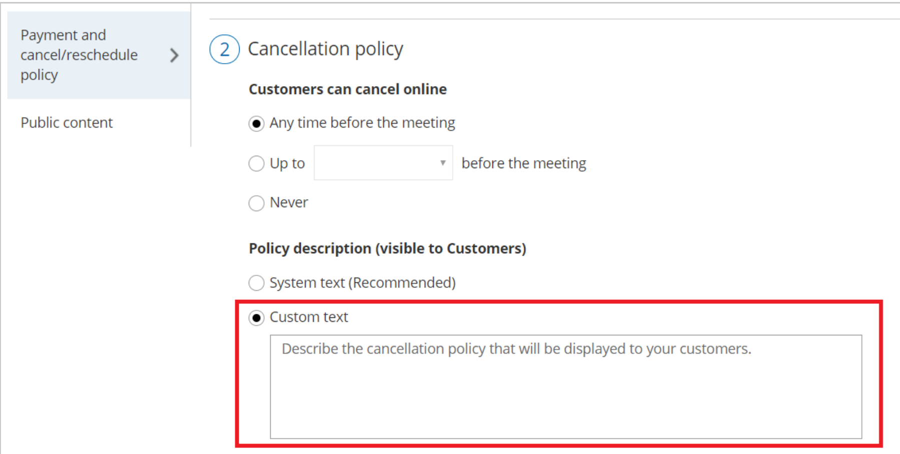


Figure 3: Entering Custom text for the Payment and cancel/reschedule policy

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).

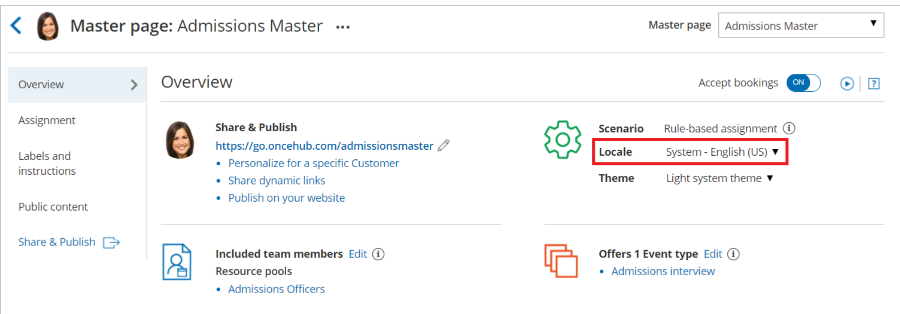


Figure 4: Selecting a Locale in the Master page Overview section

> **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.

Applying a Locale [Classic]

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.

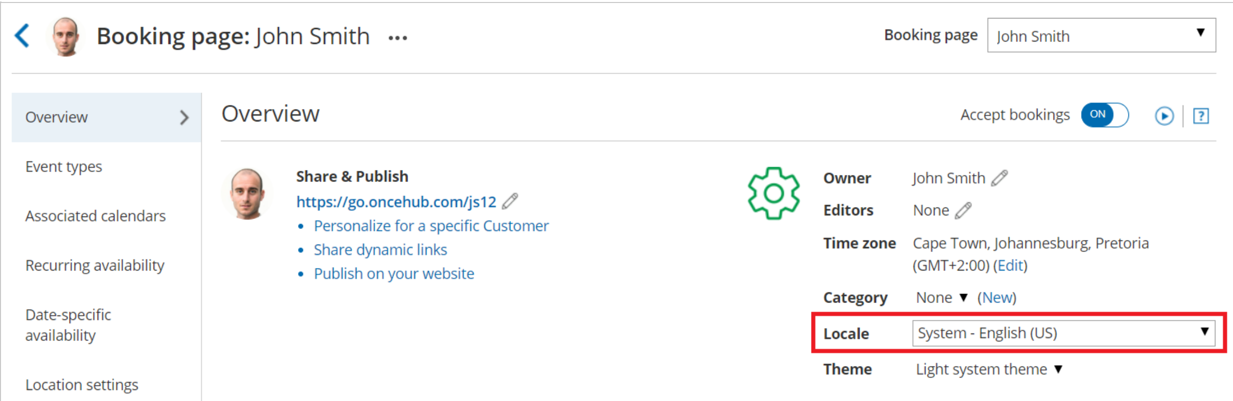


Figure 1: Booking page Overview section

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).

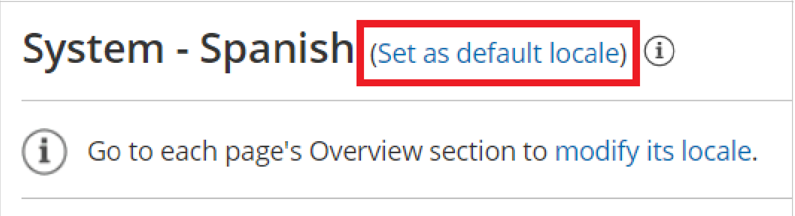


Figure 2: Set your default locale

The default locale will be automatically applied to any newly created page, but existing pages will not be affected.

System and Custom locales [Classic]

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).

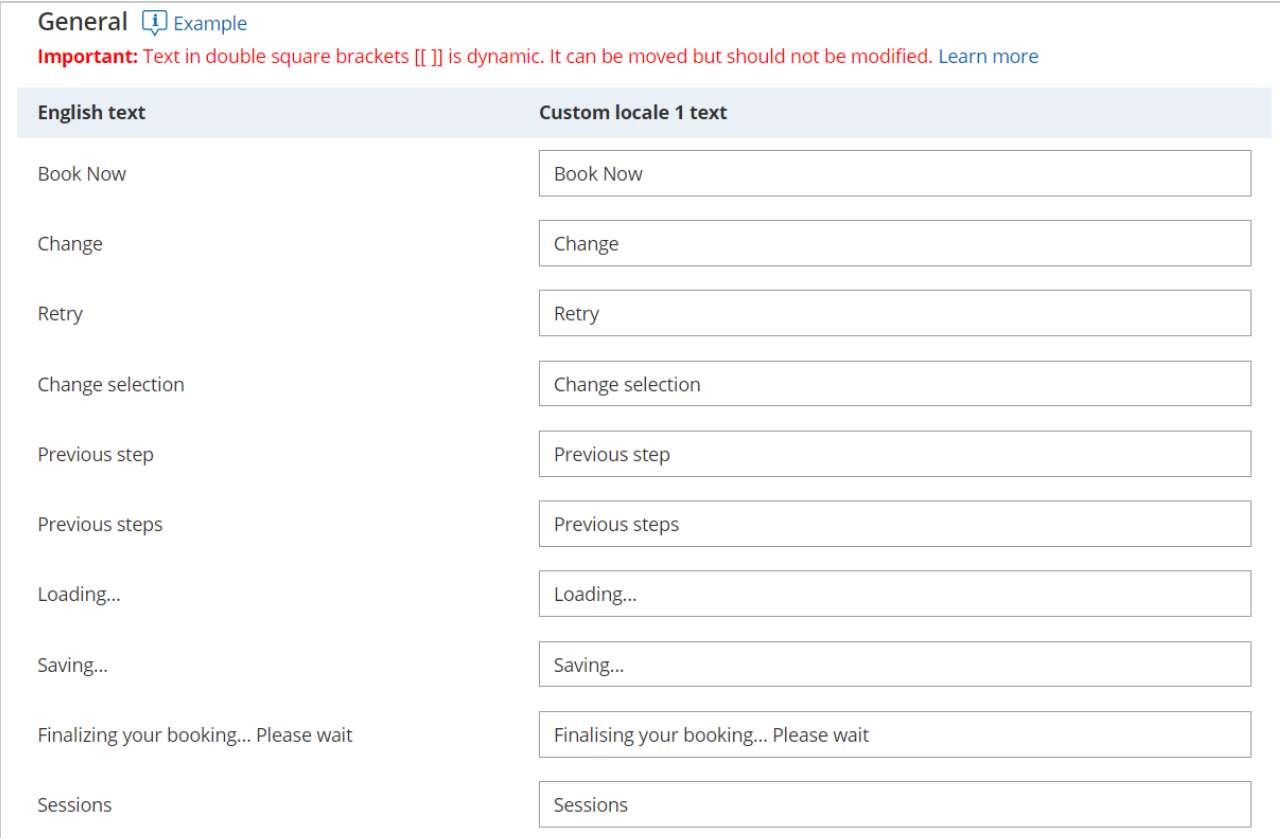


Figure 1: General section of the Localization editor

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.

Introduction to general and one-time links [Classic]

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 following the steps below:

1. Click on **Booking Pages** in the left-hand menu.
2. Click on **Share** near the top-right.
3. Select the Booking page or Master page you want to share from the dropdown menu.
4. Click on **Copy & close** to save it to you clipboard.

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 [Classic]

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 following the steps below:

1. Click on **Booking Pages** in the left-hand menu.
2. Click on **Share** near the top-right.
3. Select the Booking page or Master page you want to share from the dropdown menu.
4. Click on **Copy & close** to save it to you clipboard.

You can also change the link for your Booking page or Master page in the page's Overview section. 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 [Classic]

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

You generate a one-time link for your booking links by following the steps below:

1. Click on **Booking Pages** in the left-hand menu.
2. Click on **Share** near the top-right.
3. Select the Booking page or Master page you want to share from the dropdown menu.
4. Toggle the **One-time link** option to ON
5. Click on **Copy & close** to save it to you clipboard.

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 1).

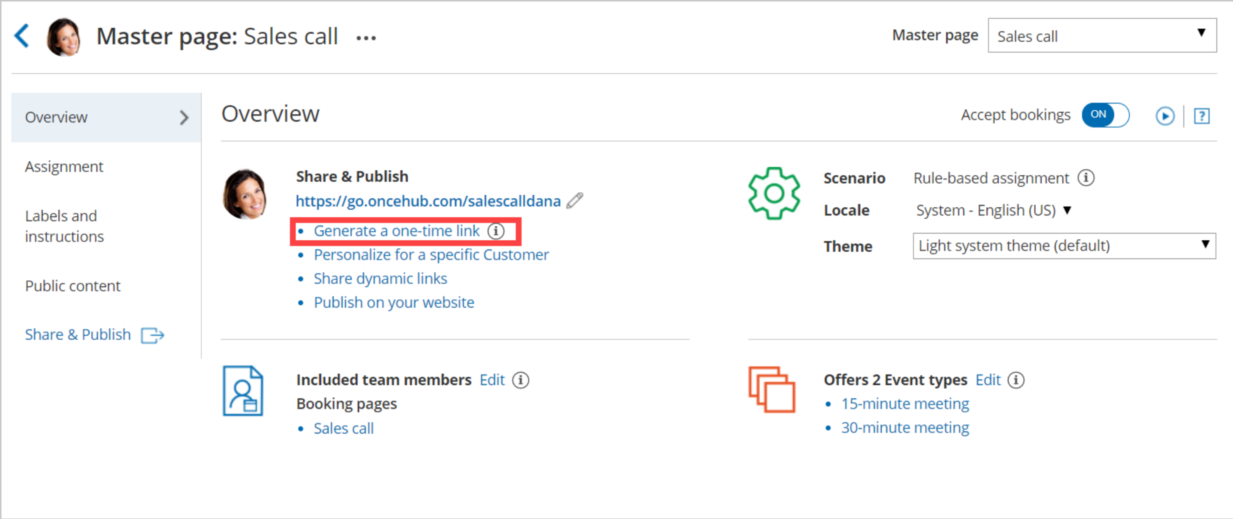


Figure 1: Generating a one-time link in the Master page Share & Publish section

4. The **One-time link** pop-up will appear (Figure 2).

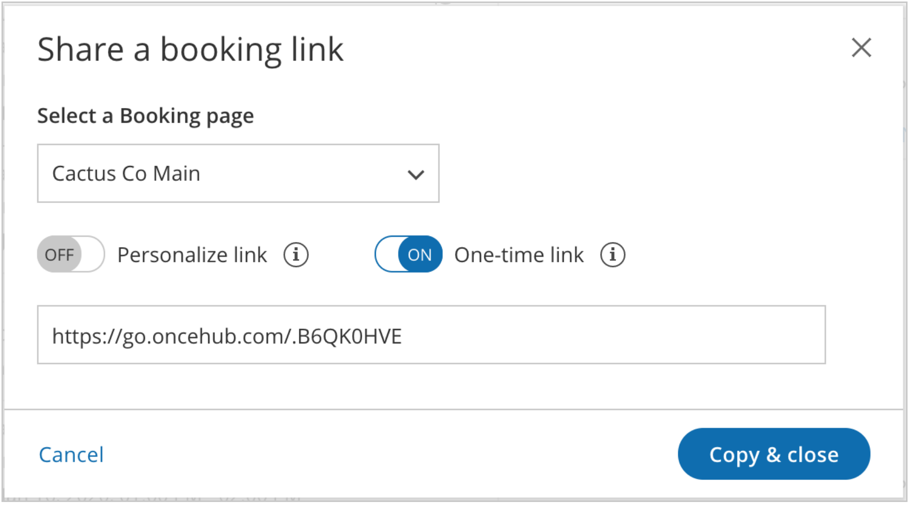


Figure 2: One-time link pop-up

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**.

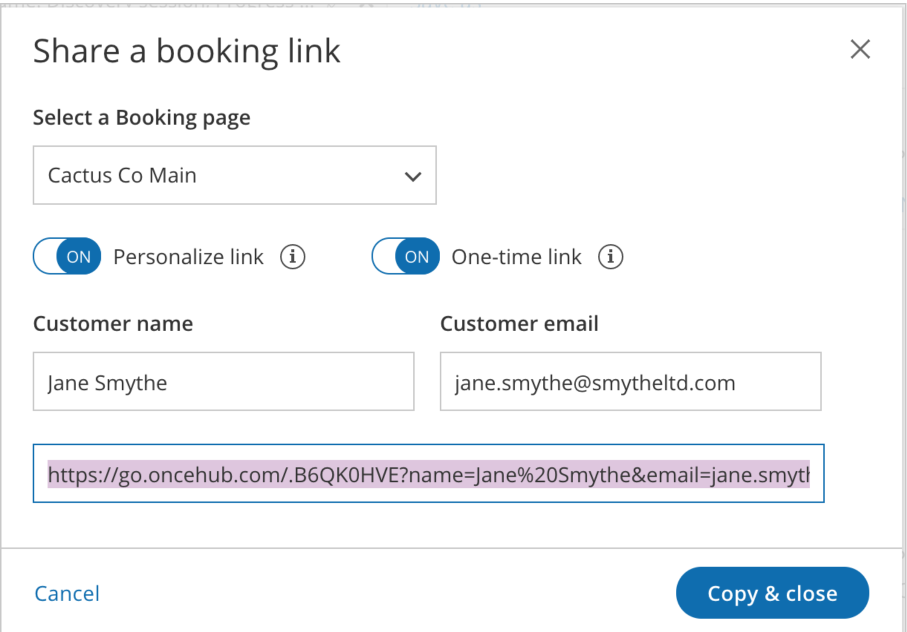


Figure 3: Personalize link enabled

> **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 4). 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.

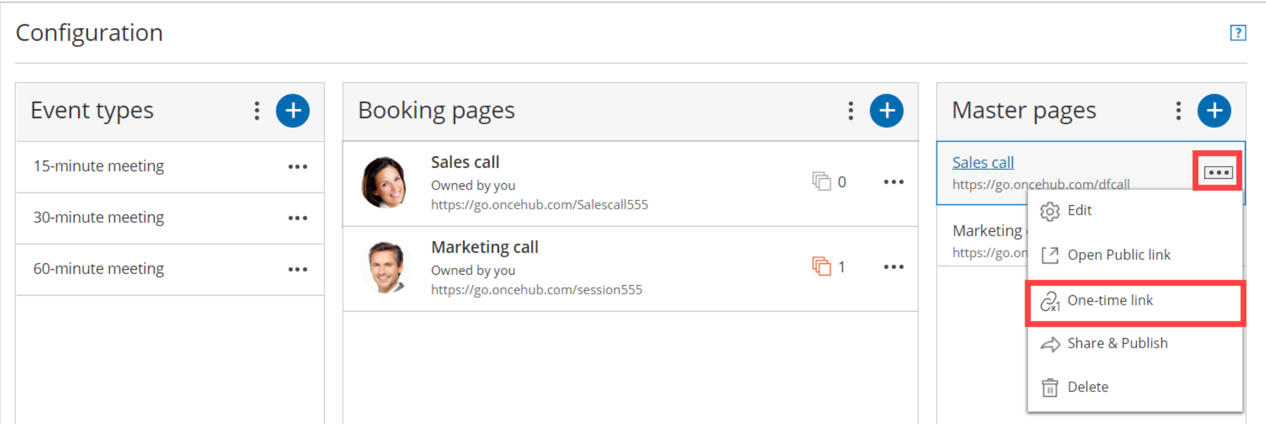


Figure 4: Generating a one-time link from the Booking page scheduling setup

> **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 [Classic]

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).

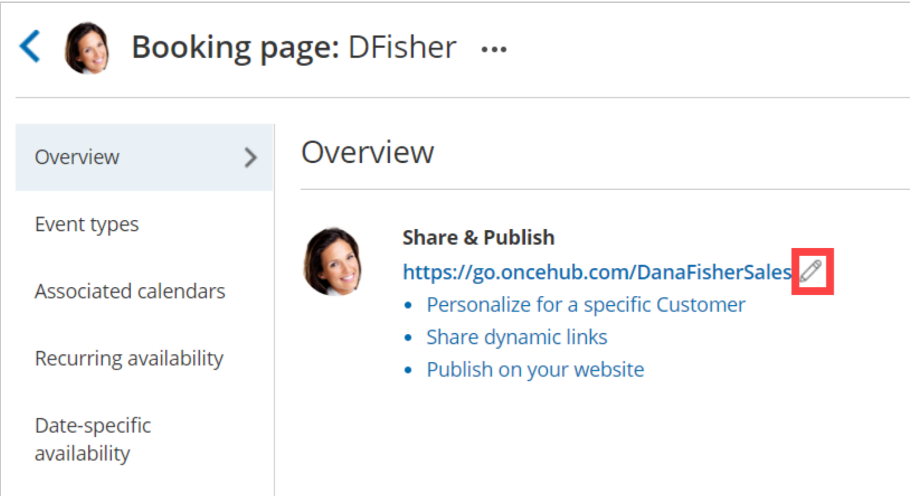


Figure 1: Booking link edit icon

4. The Booking page or Master page **Primary settings** pop-up will open (Figure 2).

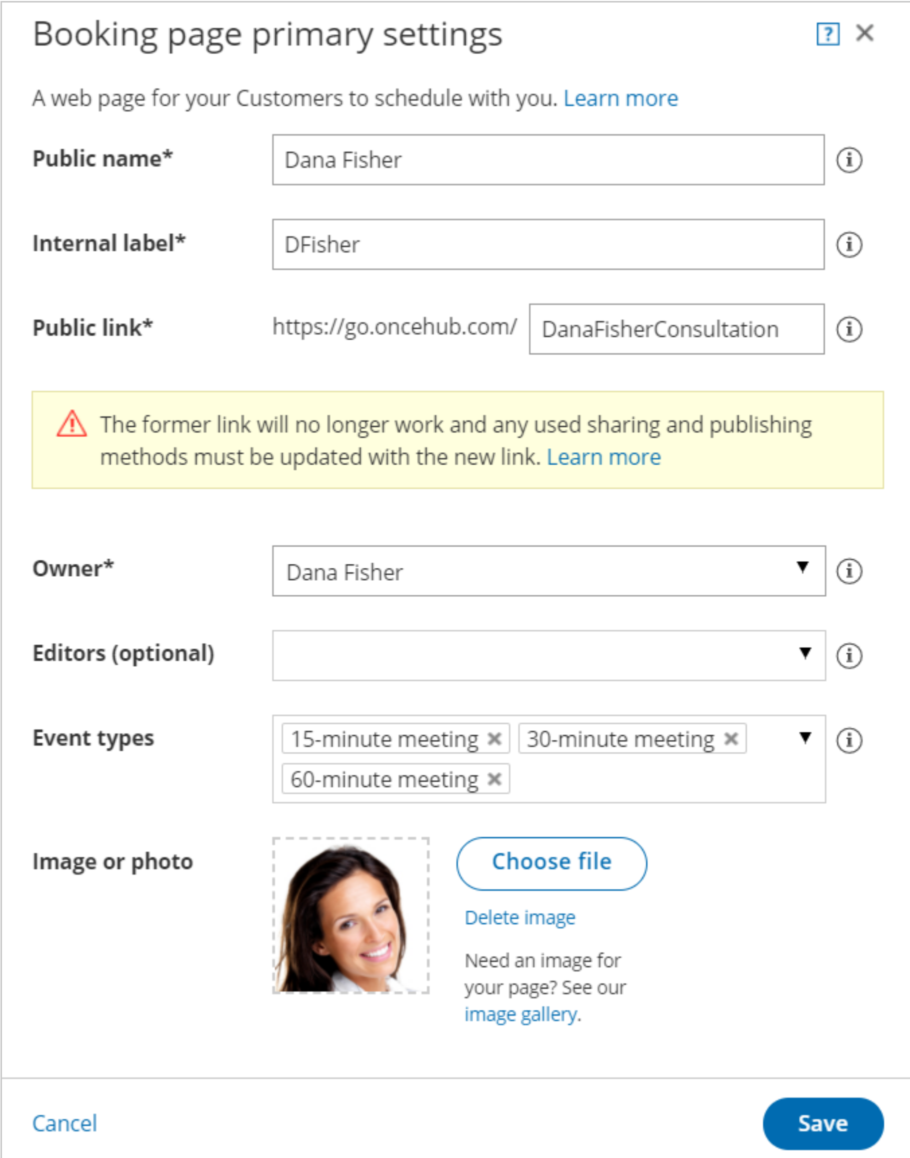


Figure 2: Booking page primary settings pop-up

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**.

Add a Scheduling button to your email signature [Classic]

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.

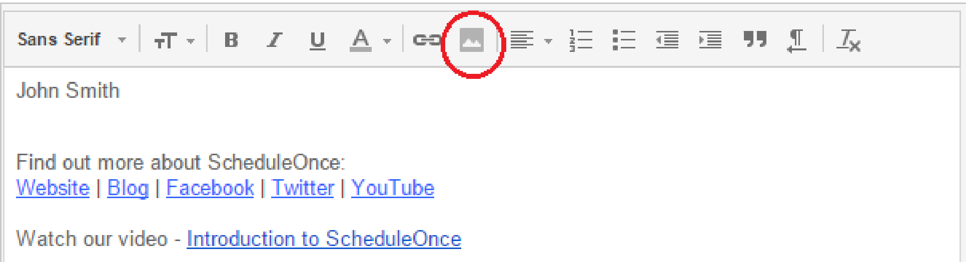


Figure 1: Picture icon in email signature editor

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).

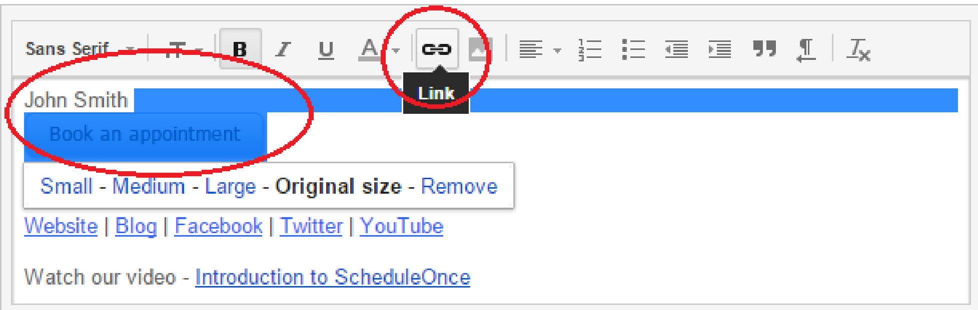


Figure 2: Add a link to your button

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.

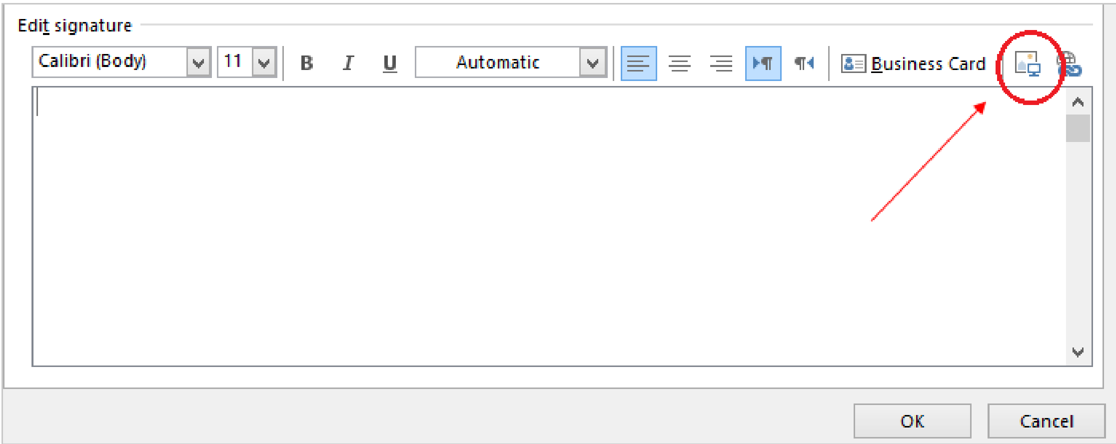


Figure 3: Upload image icon

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.

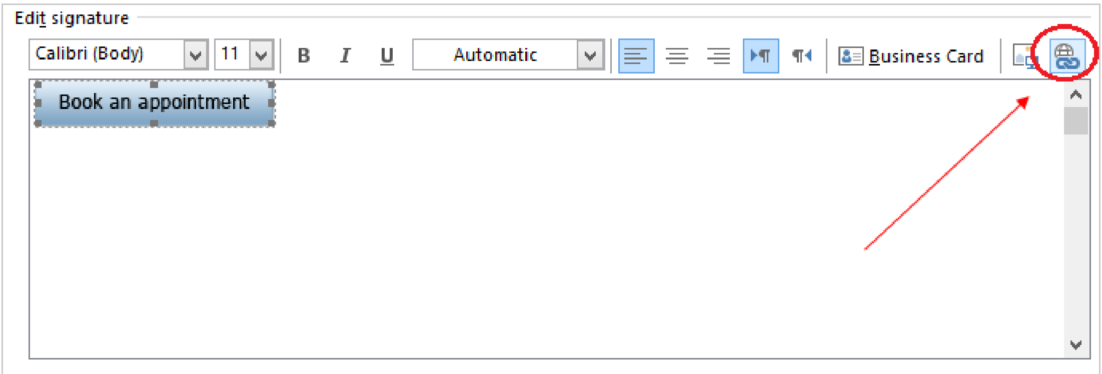


Figure 4: Add link icon

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 [Classic]

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

Introduction to Personalizing links with static parameters [Classic]

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:

1. Click on **Booking Pages** in the left-hand menu.
2. Click on **Share** near the top-right.
3. Select the Booking page or Master page you want to share from the dropdown menu.

4. Toggle the **Personalize link** option to ON.
5. Enter the customer's name and email address.
6. Click on **Copy & close** to save it to you clipboard.

You can also navigate to the Overview section of the selected page, and click **Personalize for a specific Customer** (Figure 1).

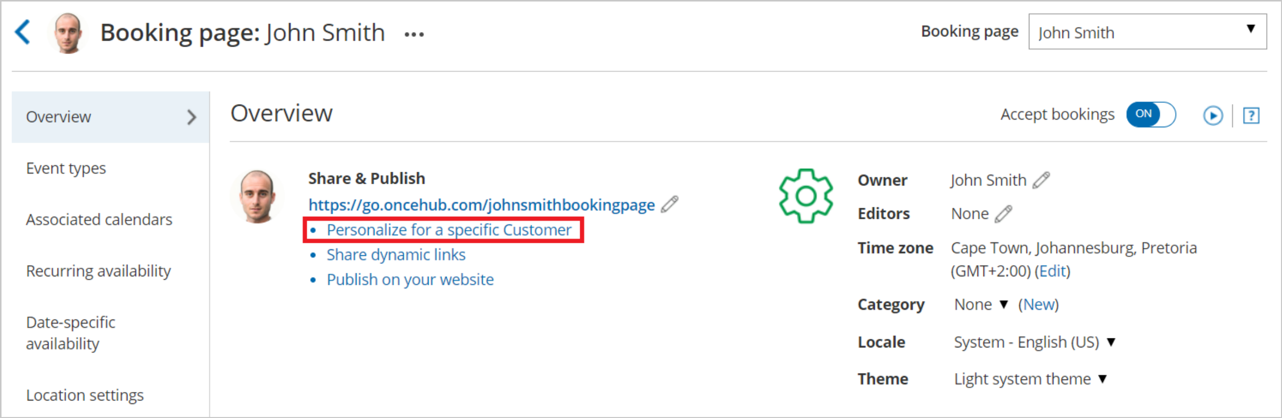


Figure 1: Booking page Overview section

Learn more about Creating a Personalized link for a specific Customer

Using Personalized links [Classic]

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 by selecting the **Share icon** in your top navigation bar:

1. Click on **Booking Pages** in the left-hand menu.
2. Click on **Share** near the top-right.
3. Select the Booking page or Master page you want to share from the dropdown menu.
4. Toggle the **Personalize link** option to ON.
5. Enter the customer's name and email address.
6. Click on **Copy & close** to save it to you clipboard.

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 1).

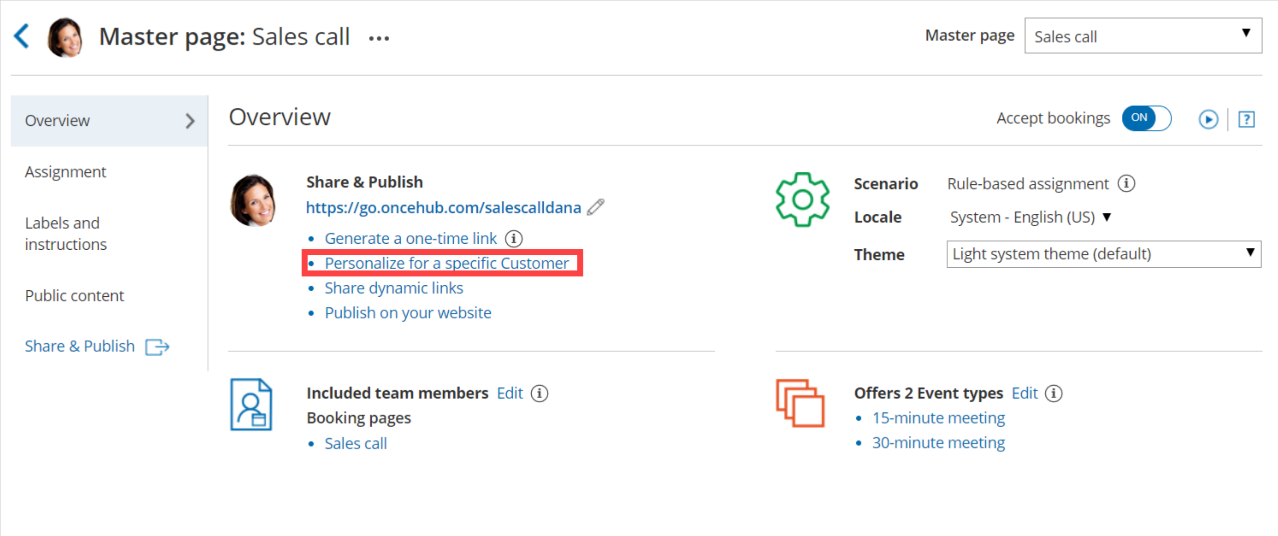


Figure 1: Personalize for a specific Customer

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 2).

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

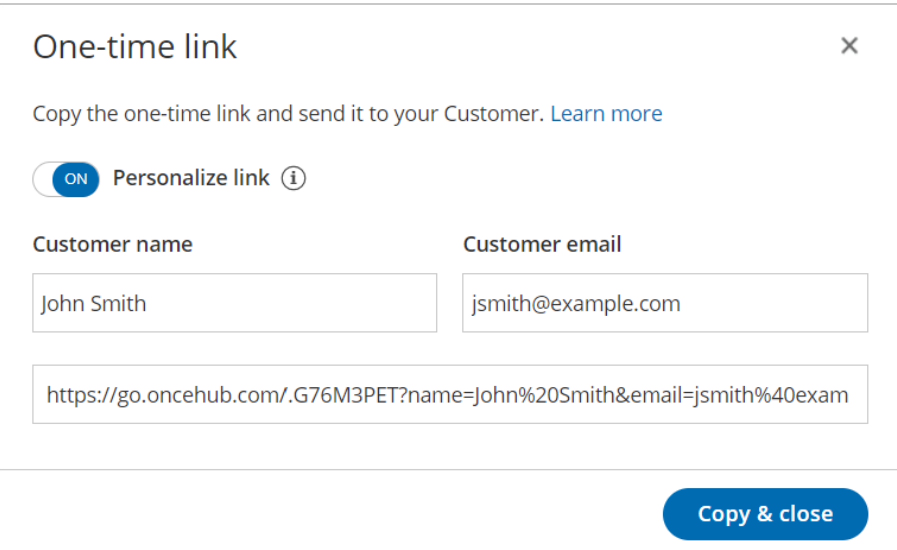


Figure 2: Personalizing a one-time link

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

Creating a Personalized link for a specific Customer [Classic]

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).

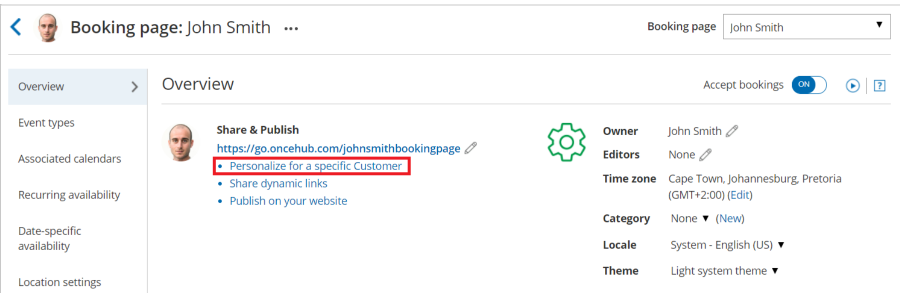


Figure 1: Booking page Overview section

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**.

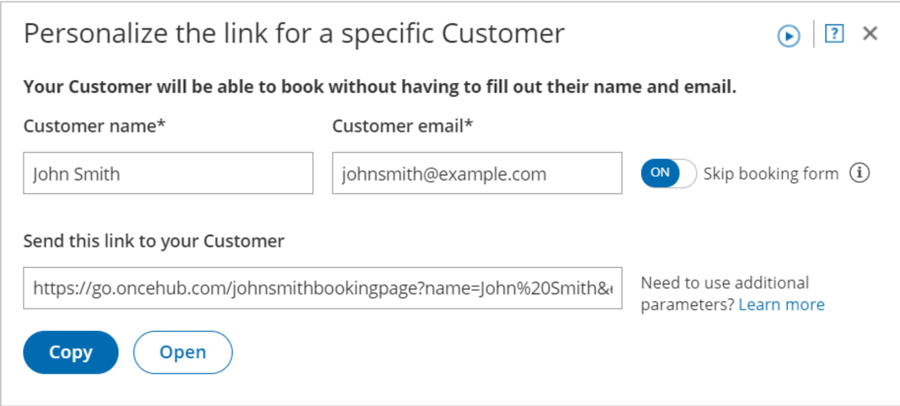


Figure 2: Personalize the link for a specific Customer pop-up

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 [Classic]

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 [Classic]

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).

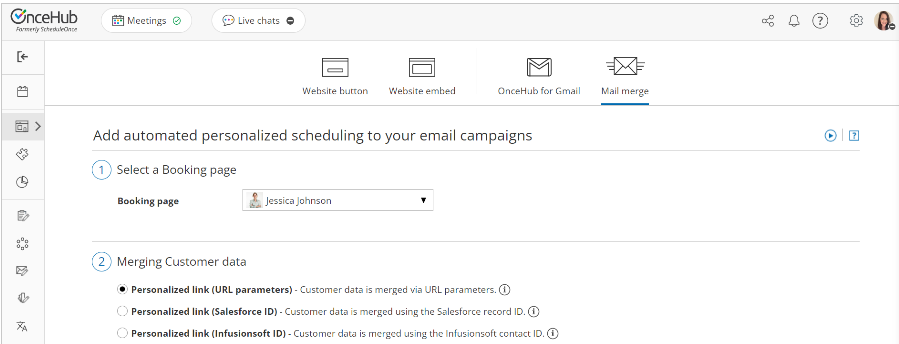


Figure 1: Select a Booking page drop-down menu

4. In the **Customer data** step (Figure 2), select **Personalized link (URL parameters)**.

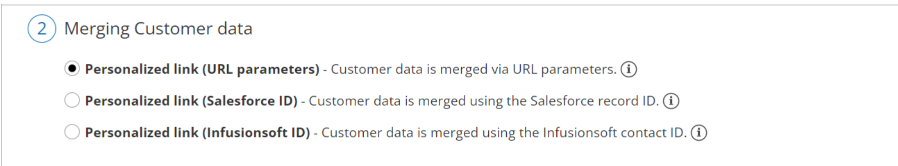


Figure 2: Customer data step

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).

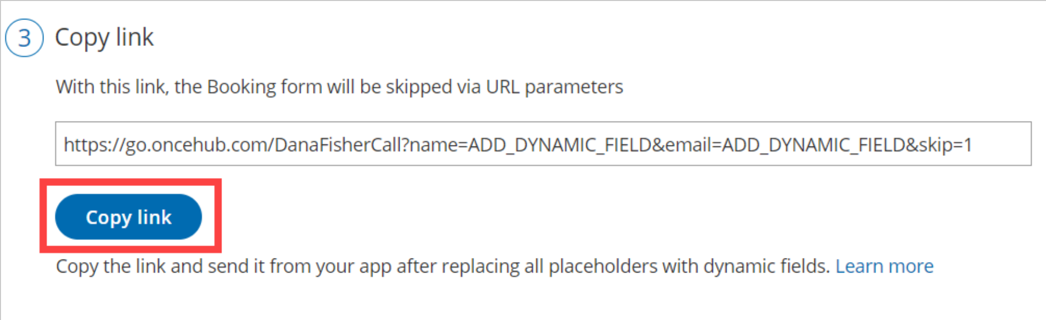


Figure 3: Copy link step

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.

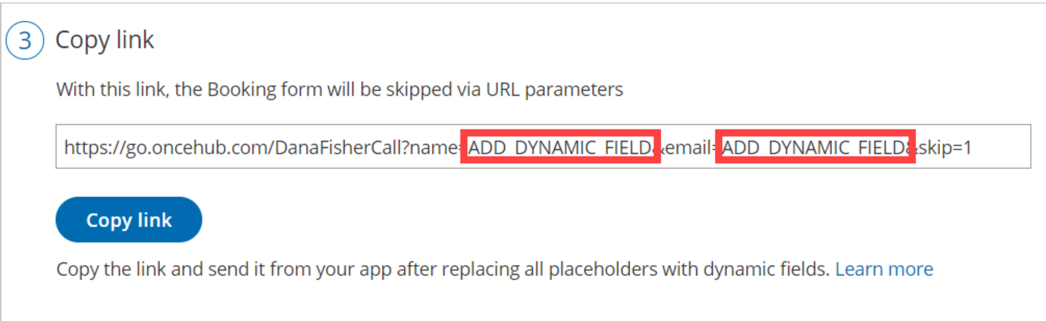


Figure 4: ADD_DYNAMIC_FIELD placeholders

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.

Personalized links in email marketing apps [Classic]

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.

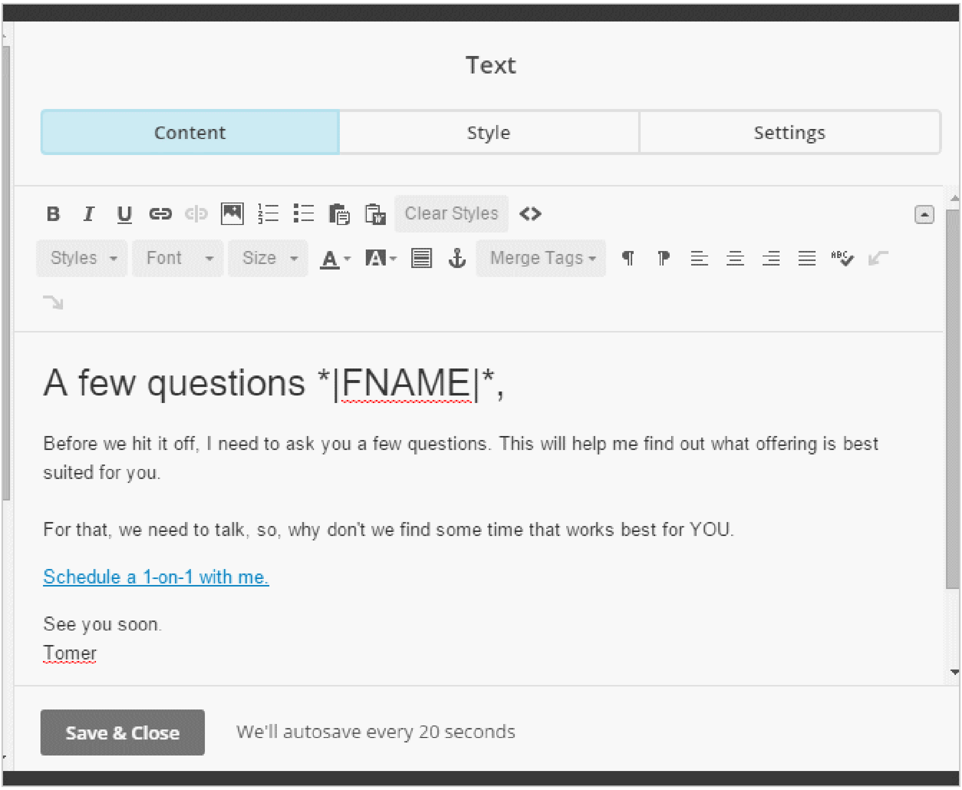


Figure 1: Mailchimp email editor

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 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?

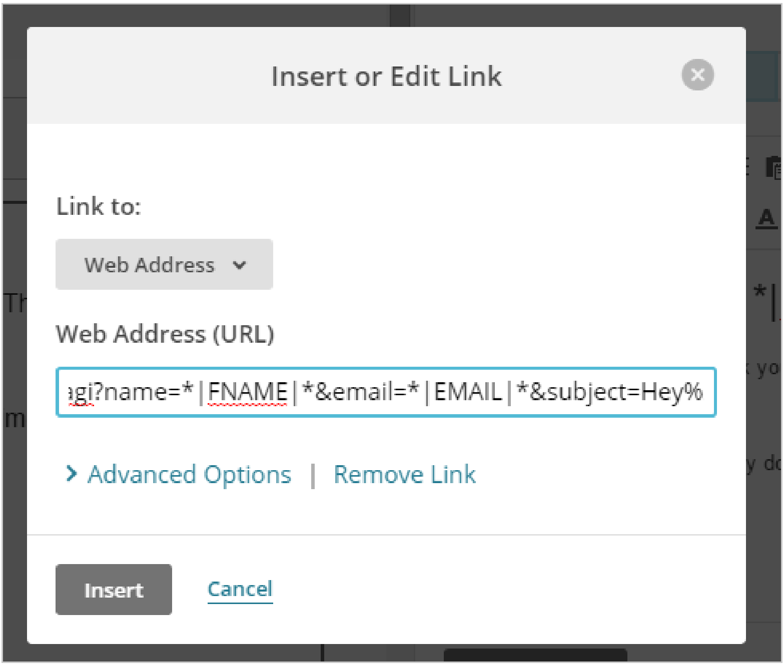


Figure 2: Insert or Edit Link

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.

URL parameters syntax and processing rules [Classic]

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).

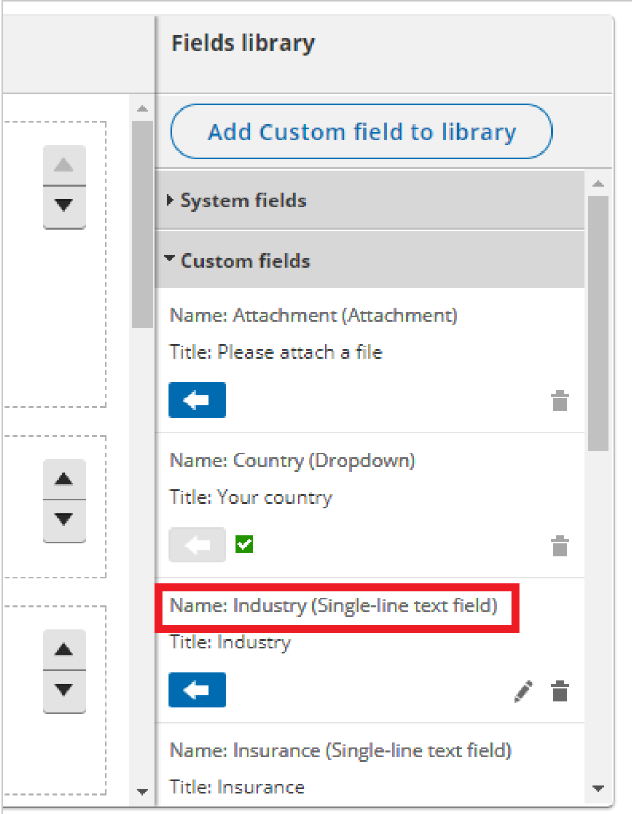


Figure 1: Custom field in the Booking forms editor

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.

Personalizing with dynamic CRM record IDs [Classic]

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

Configuring your booking page for maximizing booking rates in marketing campaigns [Classic]

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.

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 one of our native CRM integrations, read the maximizing booking rates in Salesforce campaigns article or the maximizing booking rates in Infusionsoft campaigns article.

Sharing your booking links in emails and other apps [Classic]

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**.

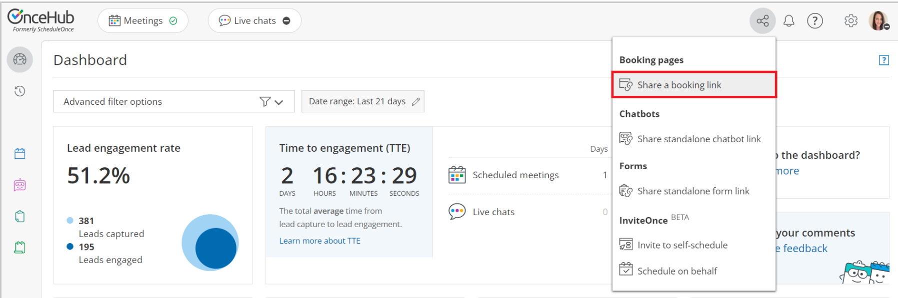


Figure 1: Schedule button

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).

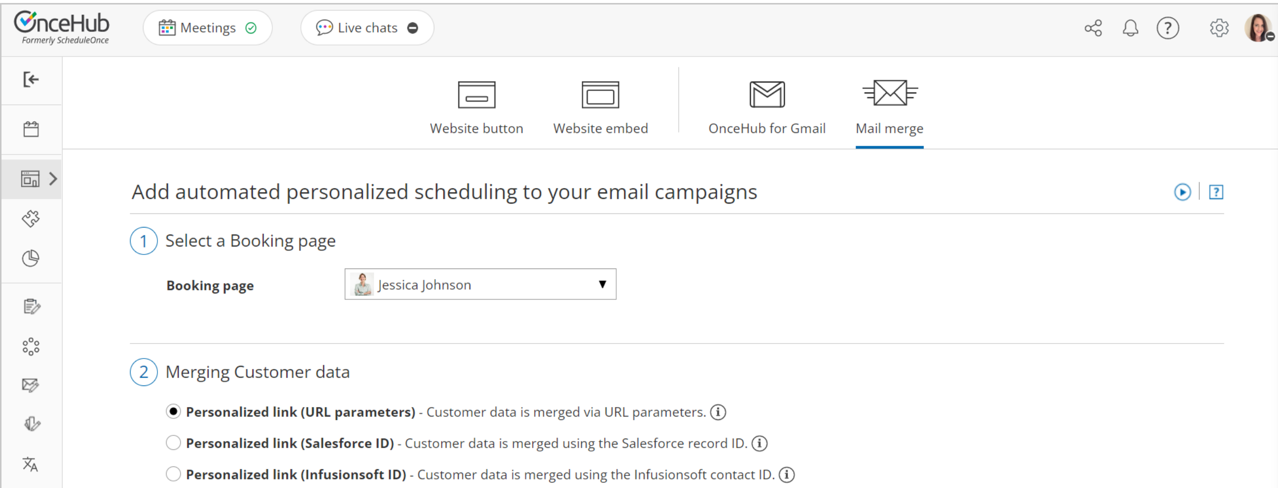


Figure 2: Links on the Mail merge tab

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

Website embed [Classic]

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).

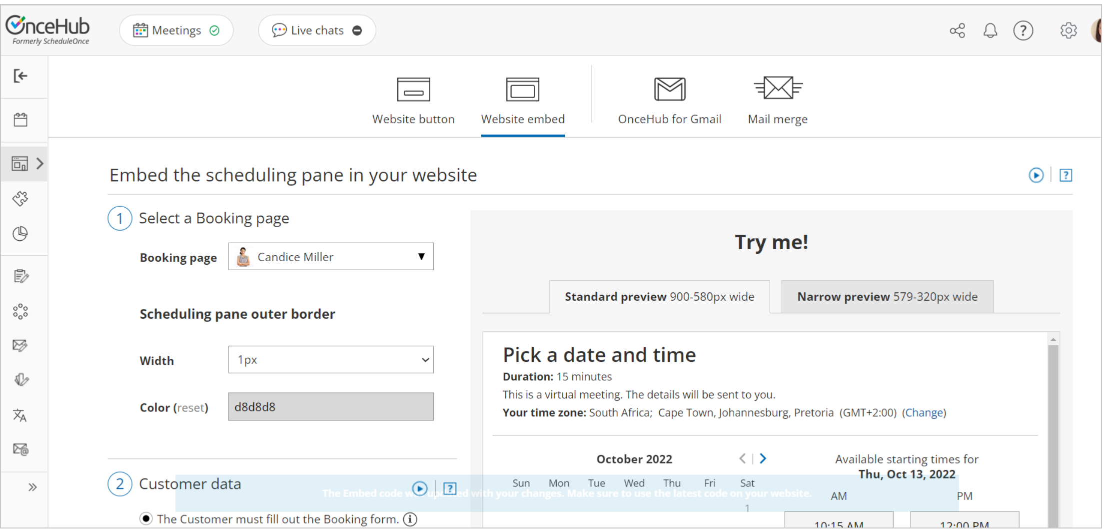


Figure 1: Website embed

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

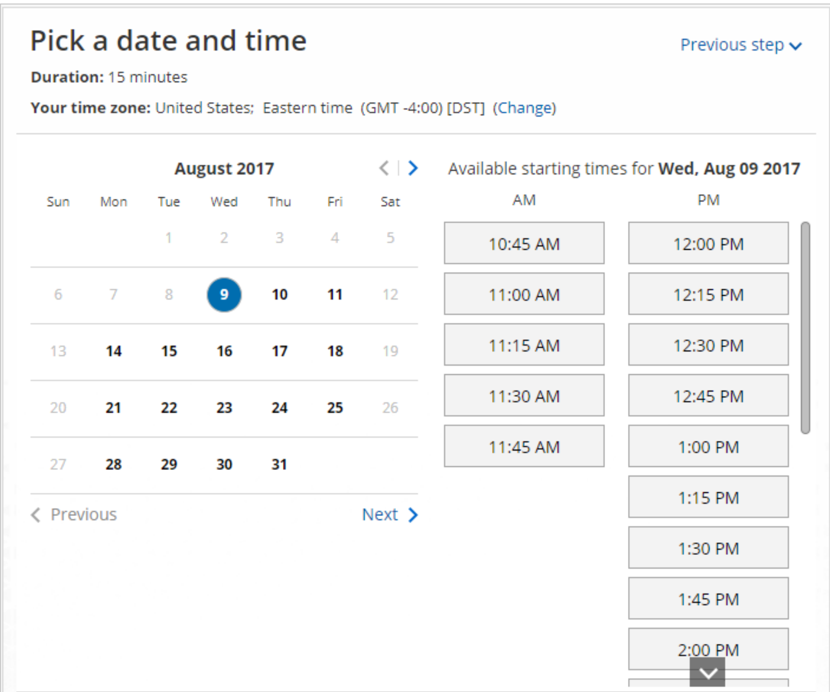


Figure 4: Embedded frame layout when width is between 900–541 pixels

The embedded frame layout when width is between 540–320 pixels

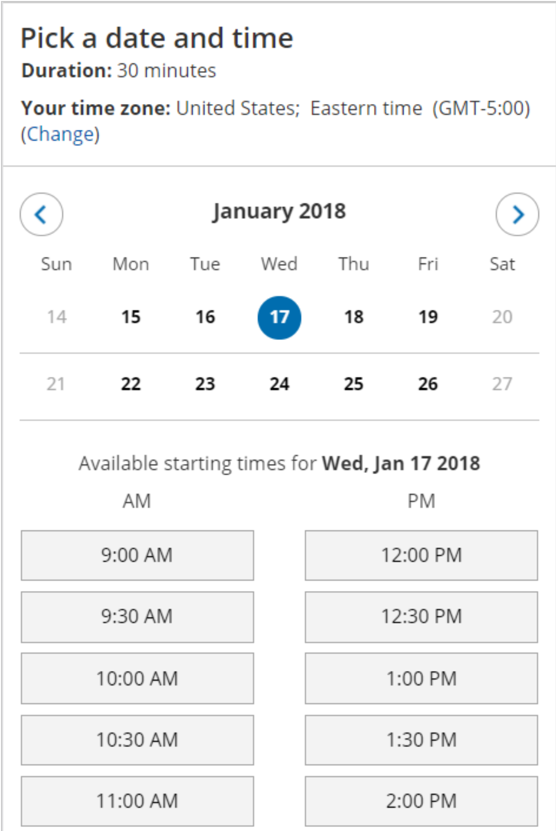


Figure 5: Embedded frame layout when width is between 540–320 pixels

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 [Classic]

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).

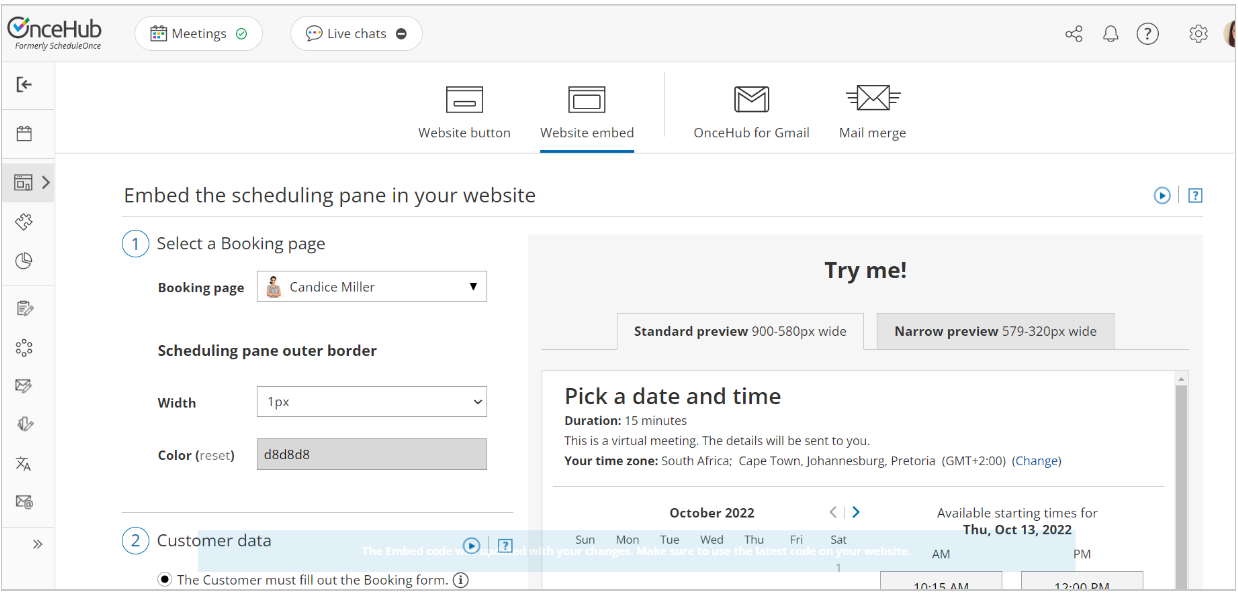


Figure 1: Website button tab

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.

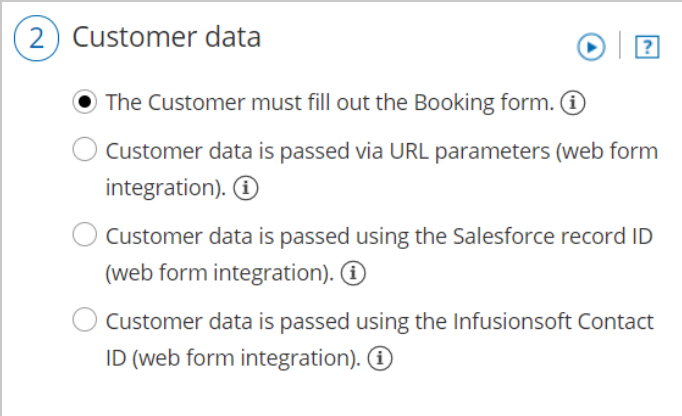


Figure 2: Customer data step

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.
  Please note that this **does not effect** the time slot selection step of the booking process. This means that a vertical scroll bar will be added automatically if you have a large amount of times slots available for a given day.

```
<!-- 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 [Classic]

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

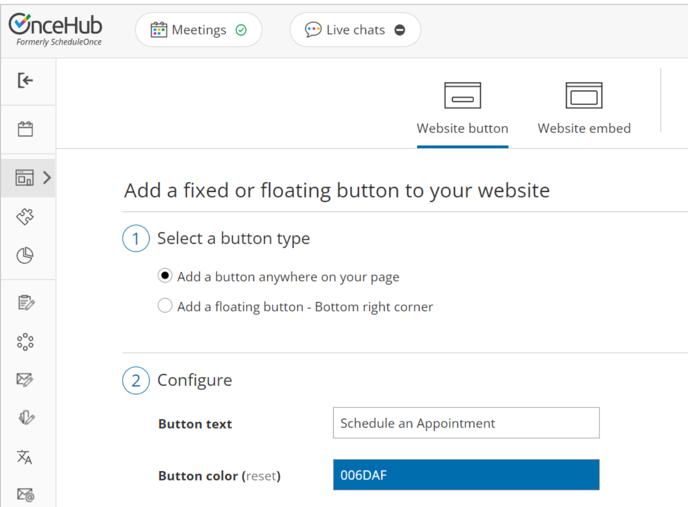
1. Go to **Booking pages** in the bar on the left → **Booking page → Share & Publish**.
2. Select the **Website button** tab (Figure 1).
3. 

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.

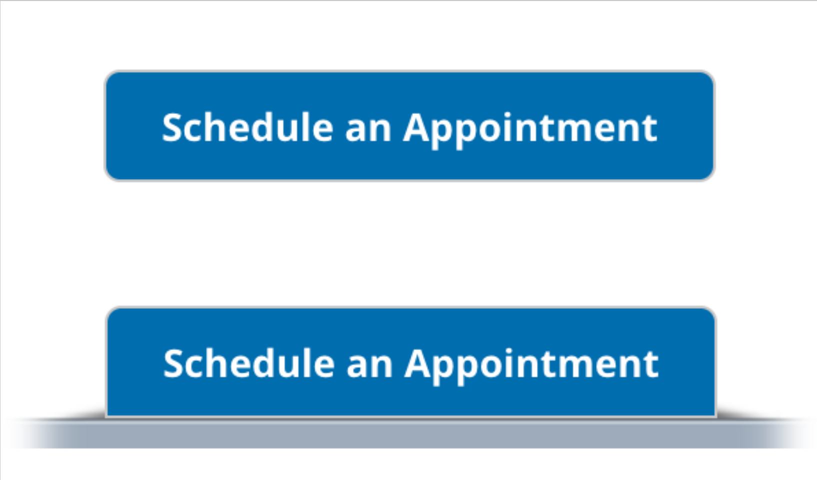


Figure 3: Standard button and floating button

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**.

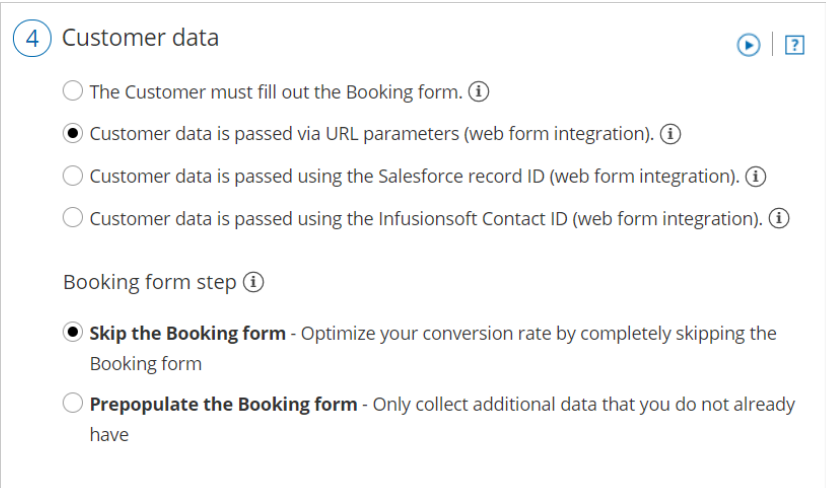


Figure 4: Customer data step

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 [Classic]

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).

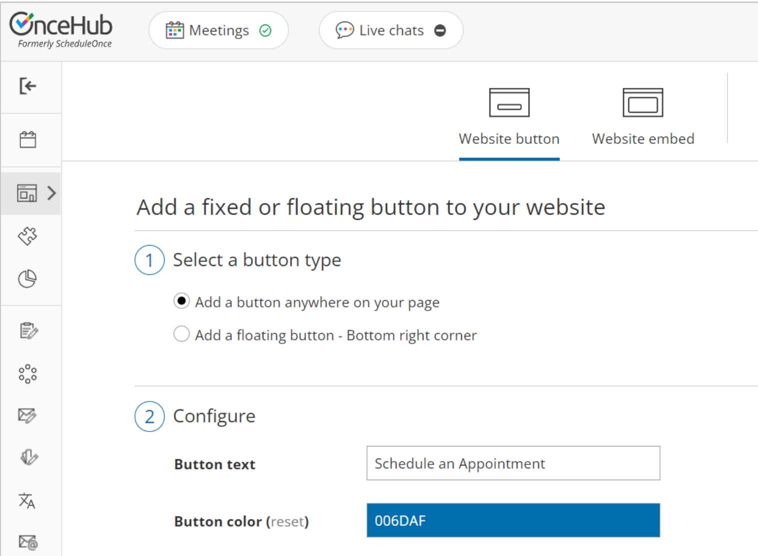


Figure 1: Website button tab

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

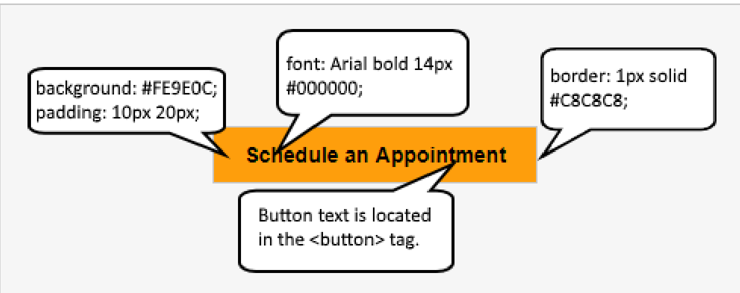


Figure 2: Modifiable button properties

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.

Add a button to Wordpress [Classic]

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).

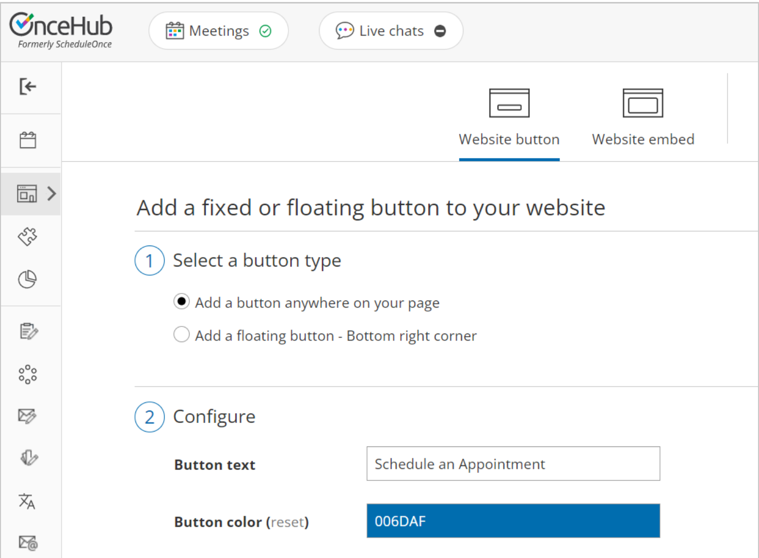


Figure 1: Website button tab

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.

Solutions for Customer onboarding [Classic]

Once a prospect has become a Customer, a smooth onboarding process can secure their long-term trust and loyalty. With OnceHub, scheduling setup sessions, training sessions, and installation sessions become an integral part of your workflow. You'll conduct more sessions, reduce time to implementation, and increase Customer satisfaction.

Here are some ways that you can use OnceHub in common onboarding scenarios.

Scheduling onboarding sessions from your portal or app

If you offer online products and services, strategically placing a call-to-action to schedule an onboarding session within your password-protected portal or app is a great way to help Customers learn about your product and how to maximize its benefits.

- The call-to-action to schedule can be placed in multiple places in your software. You can use our Website embed or Website buttons to integrate OnceHub with your app or portal.
- As your Customers are already logged in, these options can be offered only to specific Customer segments who meet certain criteria. For example, you can decide to offer these sessions only to premium users, within a certain time frame from registration, or any other relevant Customer criteria.
- Additionally, the Customer's profile data can be passed to OnceHub. Login integration will allow Customers to be recognized when they make a booking. It will ensure that Customers make the booking with the same email address that they have used to register for your portal, allowing you to relate the booking to your Customer records.

Offering onboarding sessions via personal invitations

Your onboarding Team members might find it useful to send Customers individual email invitations with

Personalized links. All your Customers need to do is select a time. There is no need for them to provide personal information or update any information that you already have.

This can be done both for specific Customers, or on a larger scale as part of your automated onboarding process. You can decide to offer this to all of your Customers, or only to those on higher service plans.

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

Integrating scheduling into your online training catalog

Beyond onboarding sessions, you can also use online scheduling together with our Payment integration features to build online training catalogs. You can start by defining training courses consisting of single sessions or multiple sessions, in private or in group format.

You can include a link to your training catalog within your emails or within your portal or app. Your Customers will be able to select from the available training courses, pay for their session, and receive immediate confirmation of their booking and payment in one single action. Using our Payment integration features, all payment activities including payments, invoicing, and reporting are automated.

Login integration for Customer onboarding [Classic]

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**
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.

Website embed: Business scenarios [Classic]

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 button: Business scenarios [Classic]

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

Introduction to web form integration [Classic]

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 web forms using URL parameters [Classic]

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).

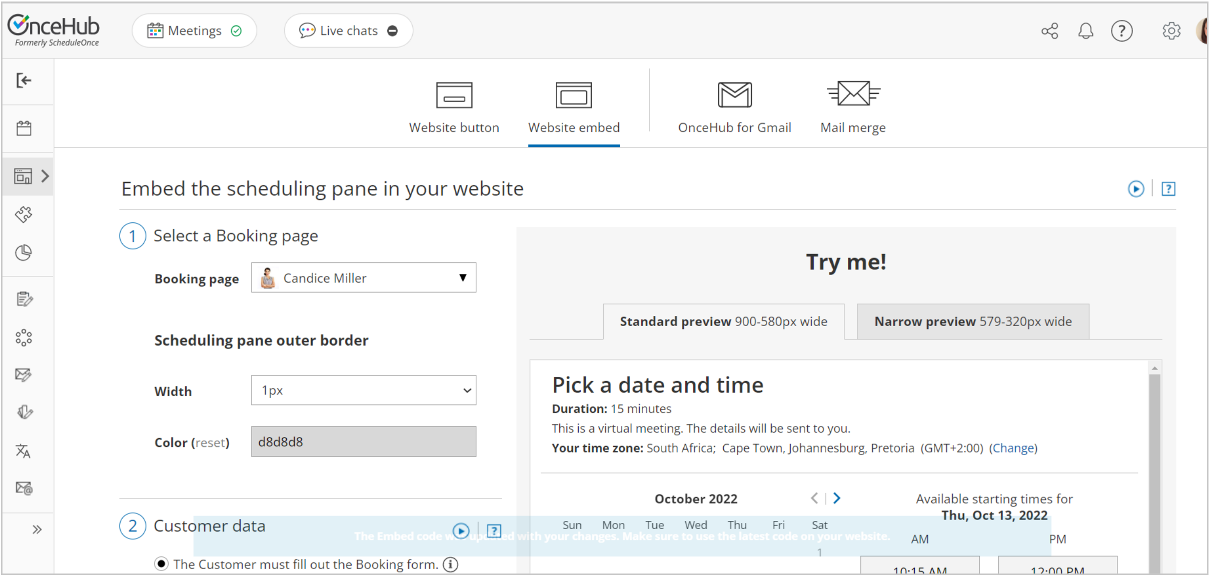


Figure 1: Select a Booking page step

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.

Integrating web forms with Salesforce and OnceHub [Classic]

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 [Classic]

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).

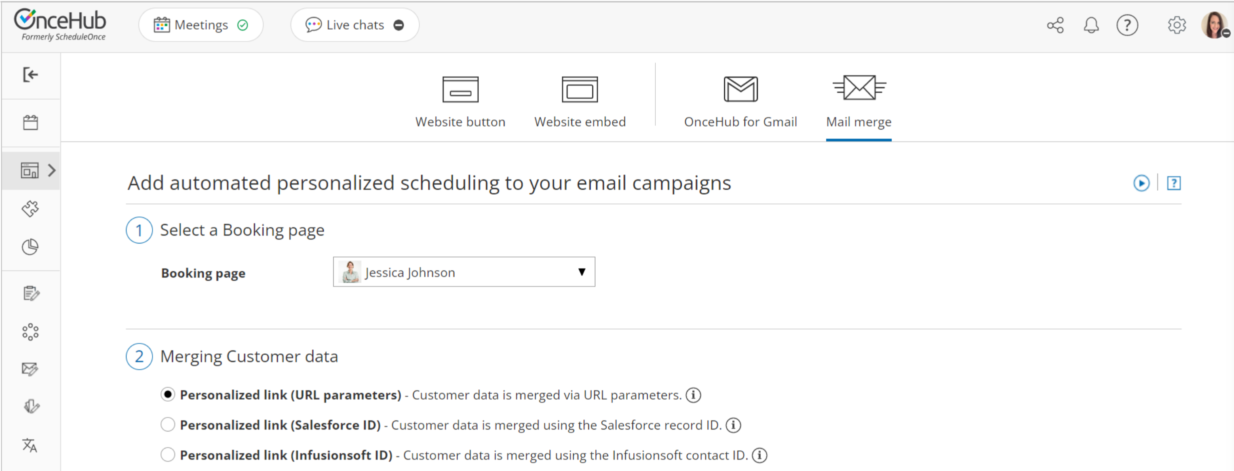


Figure 1: Select Booking page

3. In the **Customer data** step, select **Personalized link** (Figure 2).

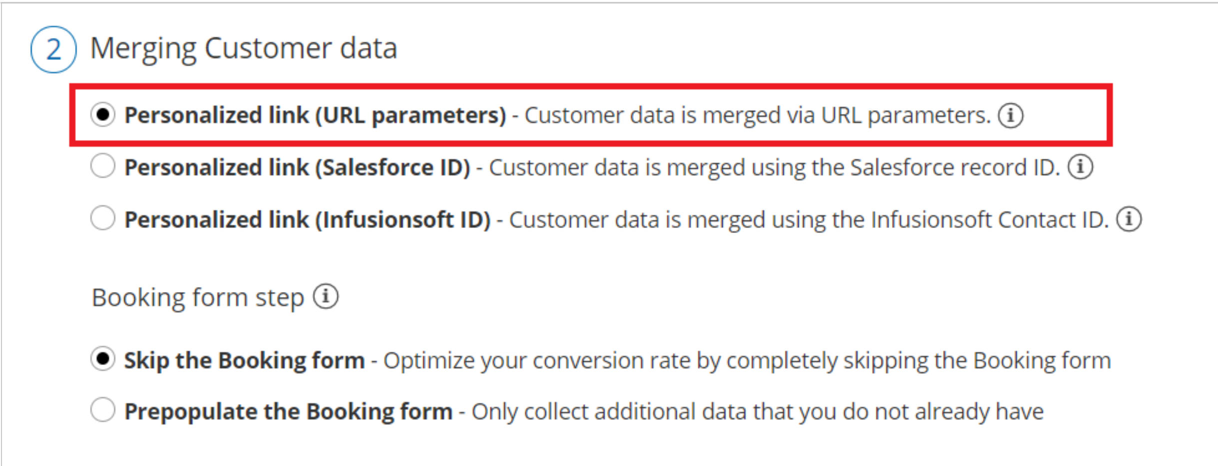


Figure 2: Customer data step

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.

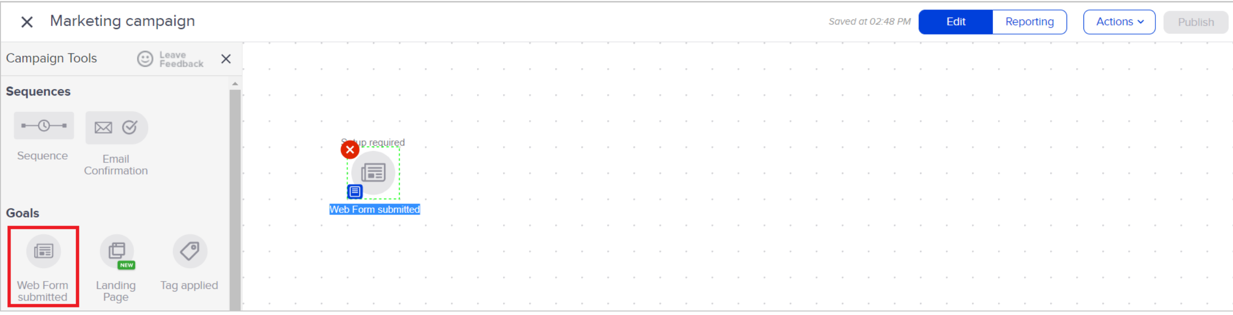


Figure 4: Infusionsoft campaign builder canvas

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).

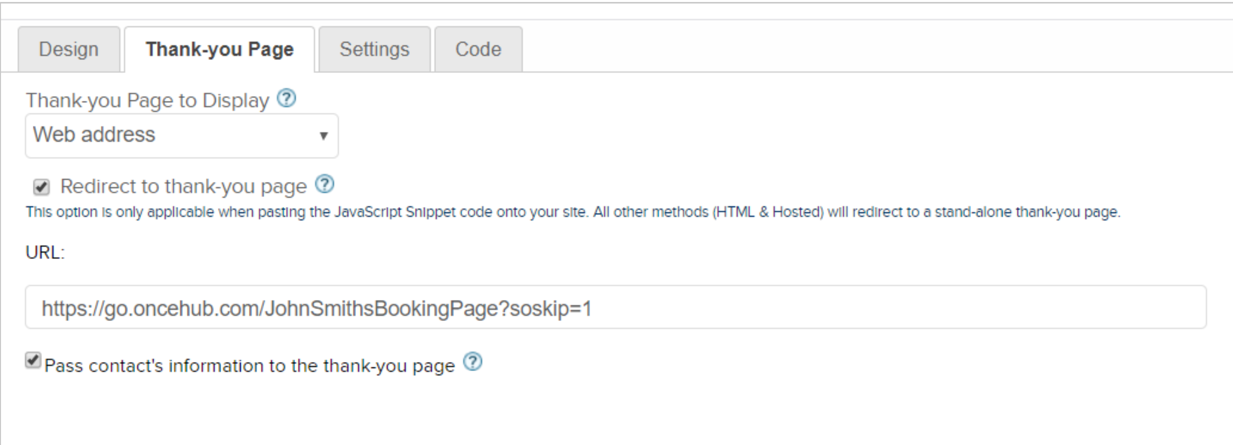


Figure 5: Thank-you page tab

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).

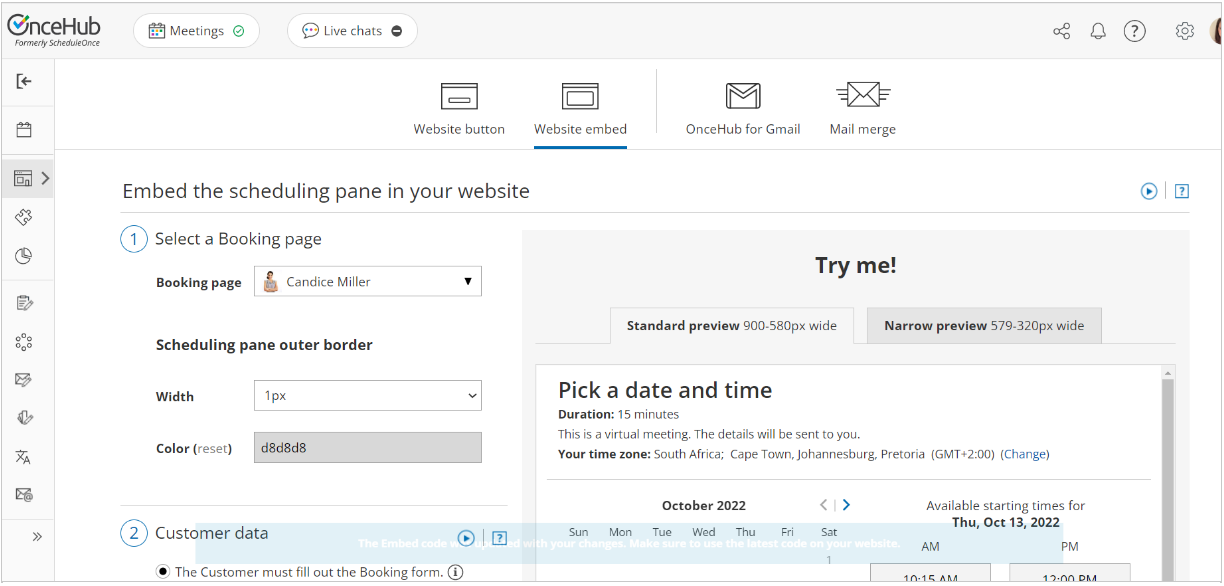


Figure 6: Select a Booking page step

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 **.**

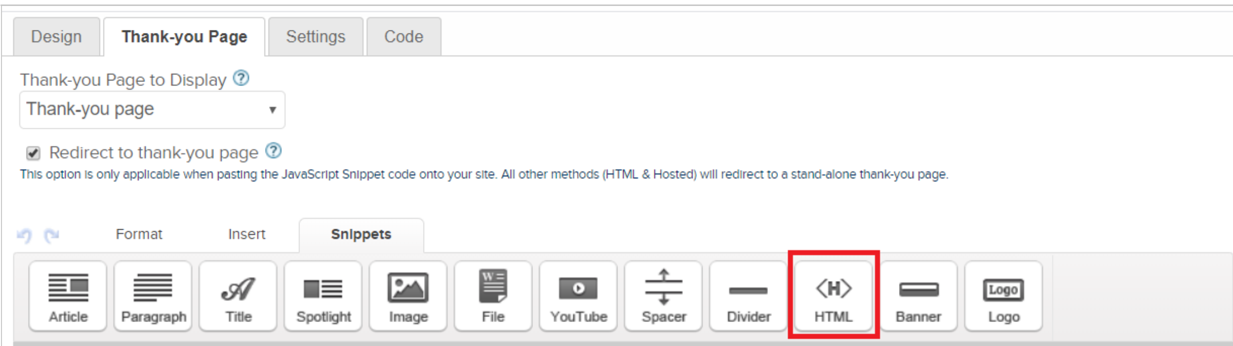


Figure 7: Thank-page Snippets tab

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 [Classic]

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 [Classic]

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).

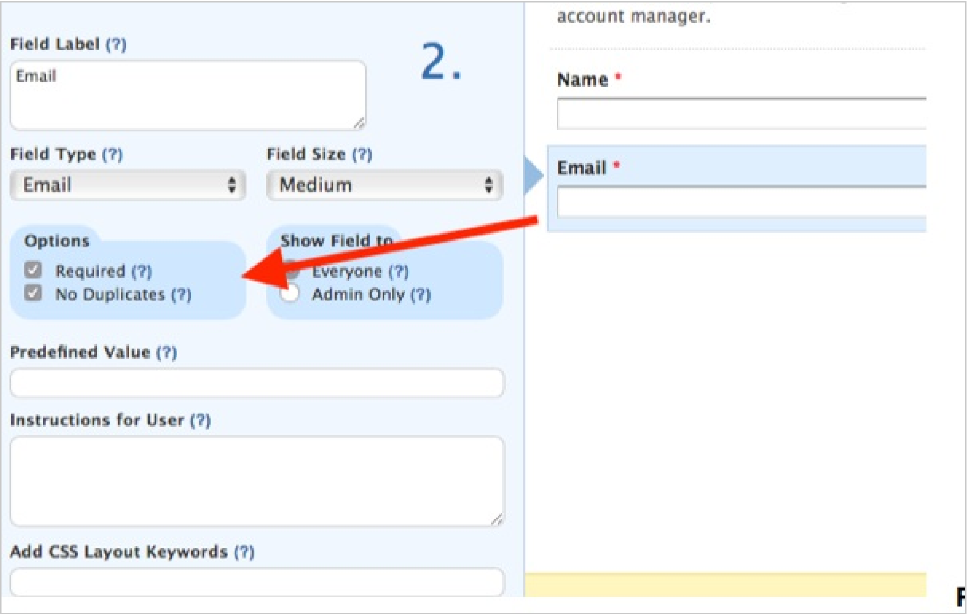


Figure 1: No Duplicates option

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).

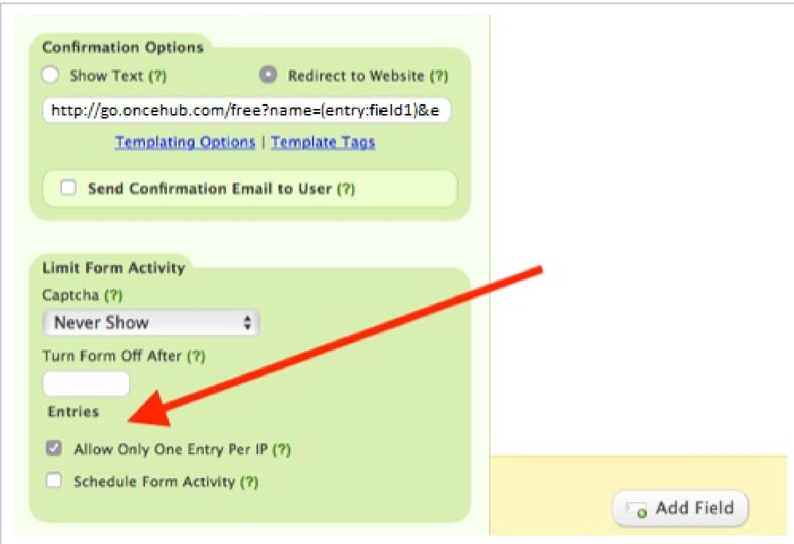


Figure 2: Allow Only One Entry Per IP option

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.

Creating a password-protected Booking page [Classic]

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).

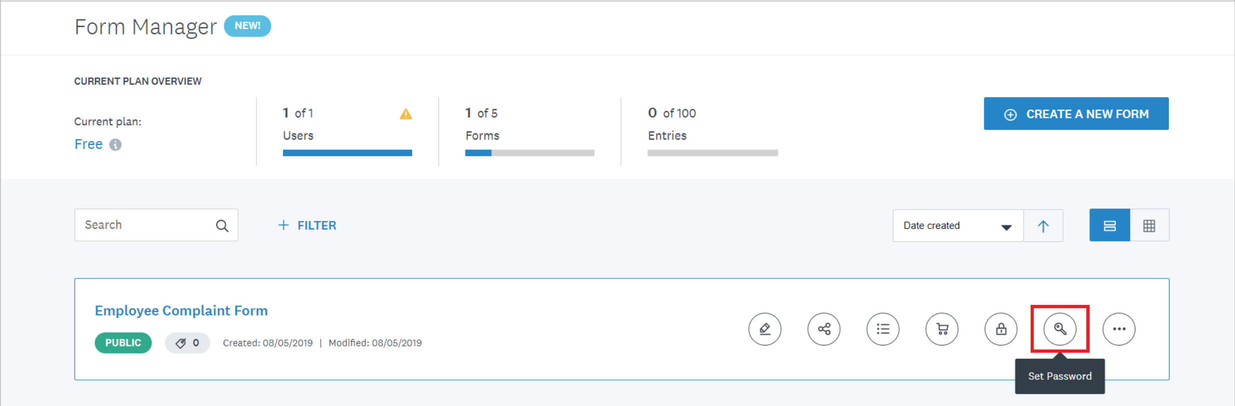


Figure 1: Wufoo Form Manager

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 [Classic]

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).

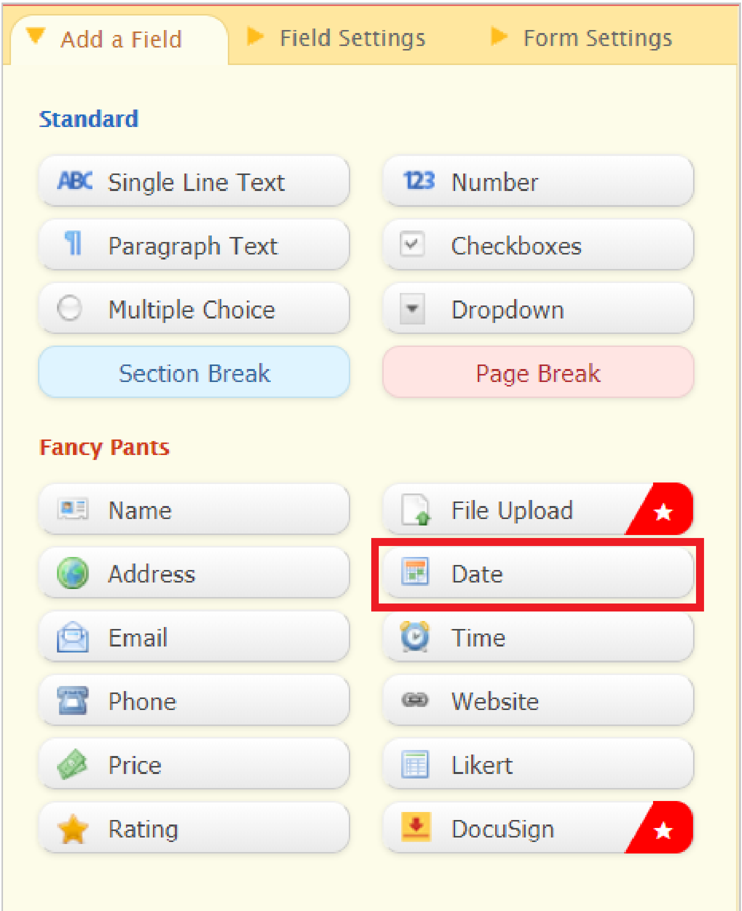


Figure 1: Add a Field tab

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.

Using OnceHub for lead generation [Classic]

Online scheduling helps you minimize lead spillage and maximize engagement with serious leads and prospects. With OnceHub, you can offer online scheduling directly on your website. This gives your website visitors a quicker, easier way to interact with your organization. Prospects who are ready to engage can schedule a guaranteed time with you then and there.

In this article, you'll learn about using OnceHub for lead generation.

Offering online scheduling to selected prospects who fill out your web form

You can use web form integration to offer scheduling only to selected prospects who fill out your web form. Not all prospects who fill out your web form are alike. Handling each prospect segment in an optimal manner can save you time and resources, increase conversion rates, and result in more deals. You can integrate calls to action for scheduling with your web form using either our Website embed or Website buttons.

You might decide that top leads, who represent the highest perceived value to your organization, will be given the opportunity to book an appointment with your organization after they submit the web form, whereas other less promising leads will not.

To identify the different lead segments, you could ask differentiating questions in your web form (for example, how many people are in your business?). You could then display different Thank you pages accordingly, some with a Booking page link and some without. Leads who are offered the opportunity to book an appointment with your organization can select a time without needing to fill out any information they have already provided.

Offering scheduling to selected prospects will both further qualify them as top leads who have shown interest, and save time for your Sales team who will not have to chase down leads for follow-up. Booking form data will be passed from your web form to OnceHub via the URL, either using URL parameters or using a CRM contact ID when integrating with Salesforce or Infusionsoft.

Learn more about using the web form as a filter

Offering online scheduling to all prospects who fill out your web form

You can use web forms on their own to capture Customer data. However, web forms do not actively assist in establishing contact with your prospects. So, you can offer scheduling to all prospects once they submit your web form. This call to action for scheduling can be integrated with your web form using either our Website embed or Website buttons.

Since prospects have already filled out their personal details, they won't have to provide them again when they make a booking. The Booking form page can be either prepopulated or skipped altogether. The Booking form information can be passed to OnceHub either using URL parameters or a CRM contact ID when integrating with Salesforce or Infusionsoft.

Offer online scheduling to any website visitor

When you offer online scheduling to anyone who visits your website, scheduling is not integrated into the web form submission process. Instead, scheduling is made readily available on your website to any website visitor. Scheduling can be integrated into any page on your website using either our Website embed, or Website buttons.

For example, presenting visitors with a button which says "Free 1-on-1 consultation" may attract more passive visitors and offer them a quick and easy way to interact with you without having to fill out your web form. This scenario can be used to implement a BOLD lead generation strategy or sell more of your time if you are a service business.

Implement a BOLD lead generation strategy

Online scheduling can help you deliver on an open door policy for website visitors who want to engage and interact with your organization.

Offering any website visitor the opportunity to schedule a meeting with your organization can be used as a BOLD marketing strategy. It's the ideal solution for small businesses who want to create and reinforce a caring image with a message that they're willing to engage unconditionally with anyone who is interested. This strong statement can be used to increase your volume of interactions with Customers and improve your chances of converting them.

Sell more of your time if you're a service business

Allowing any website visitor to book an appointment with your organization is likely to increase your future sales. If the majority of your revenue is coming from paid sessions, you want to ensure that you are reaching out to as wide an audience as possible.

With OnceHub payment integration, you can schedule and collect payments in one flow. We also take care of rescheduling and cancellations for you, including collecting additional rescheduling fees and crediting refunds for cancellations.

Learn more about Payment integration

OnceHub for lead qualification [Classic]

You've worked hard to generate leads and obtain their contact details. Now the question is **how do you qualify them in the quickest and most efficient manner?**

With online scheduling, you can spend your time qualifying leads, not chasing them down. By adding a personalized invitation into your drip campaigns, lead nurturing activities, and personal communications, you enable your prospects to book demos, consultations, or discovery sessions at a time of their choosing.

They don't need to provide any information that is already known to you. They simply click on the link, pick a time, and it's done. The Booking form can either be prepopulated with their details or skipped altogether. By minimizing the data required from your prospects to the absolute bare minimum, you'll maximize your booking rates and ultimately increase your conversion rates.

To get started, ask yourself which of the following scenarios is right for you.

Offering scheduling in your mass email campaigns and nurturing programs

If your marketing team is running mass email campaigns in which prospects are invited to sign up for a free online demo or a 1-on-1 consultation, the need to add a scheduling link is obvious. Serious leads who are ready to engage will be filtered out for you and you'll find that they've already scheduled a time for you to call them. Continue this offer in follow-up emails throughout your drip campaign to increase conversions even further.

You can also include a Personalized link for scheduling in your nurturing programs as an additional call-to-action. Replacing traditional contact information in your outbound emails with the possibility to schedule a call directly is a great way to fast track prospects to qualified status. Your content remains the center of attention, but when prospects are ready to engage, the process is instantaneous, eliminating lengthy back-and-forth communications.

How to implement this

- With your email marketing apps, you can use Dynamic fields to populate the URL parameters. This will generate a uniquely Personalized link to each recipient.
- If you use our Salesforce or Infusionsoft native integrations, you can create a Personalized link using the CRM record ID.

When you use dynamic links, you'll be sending the email directly from your marketing automation or integrated CRM system and the lead record's data will be used to prepopulate or skip the Booking form altogether.

Offering scheduling via personal invitations

If leads are directly assigned to your Sales or Sales development teams for qualification, rather than calling prospects or sending back-and-forth emails, you can send prospects individual emails with a link that is specifically customized for that Customer.

This solution offers your Sales team a quick and efficient way to establish contact with their assigned leads. From the prospect's perspective, they'll click on the link and select a time. The scheduling process will only take a few seconds to complete and the appointment with all relevant details will be automatically added to the calendars of your Sales team member and the Customer.

How to implement this

- As a Sales representative, you can create a Personalized link for a specific Customer. Learn more about creating a Personalized link for a specific Customer
- Alternatively, if you're sending many personal emails, it might be easier to personalize links with email plugins that offer dynamic email templates, such as Yesware and Marketo Sales Connect.

Scheduling and responding to booking requests [Classic]

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.

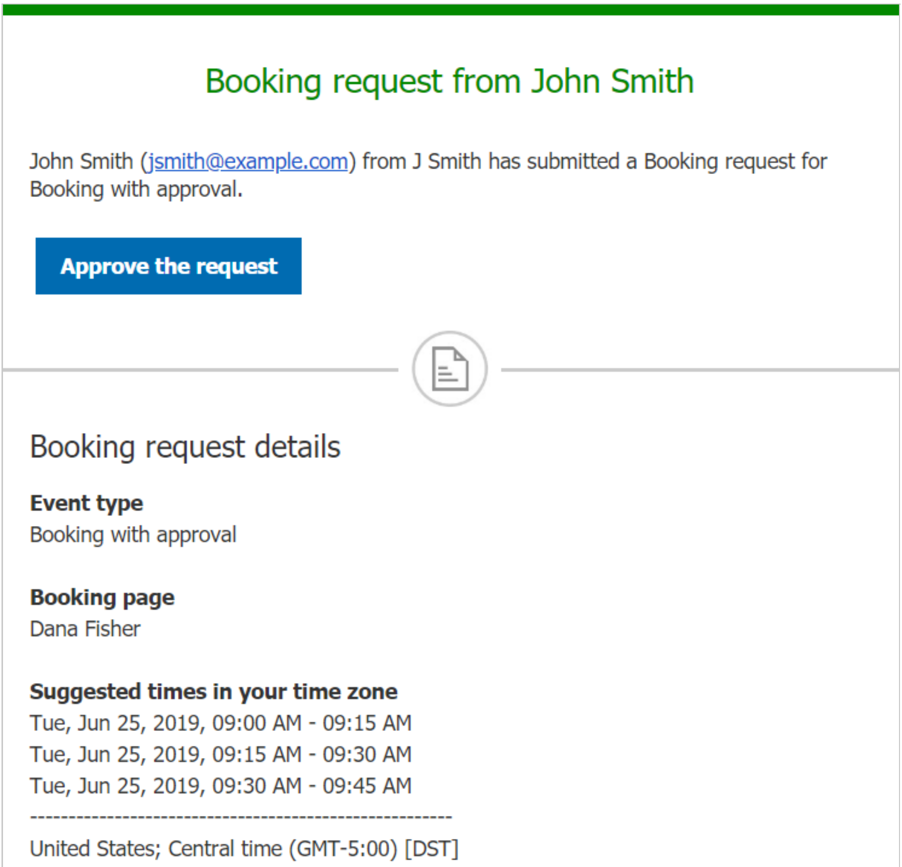


Figure 1: Booking request notification email

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.

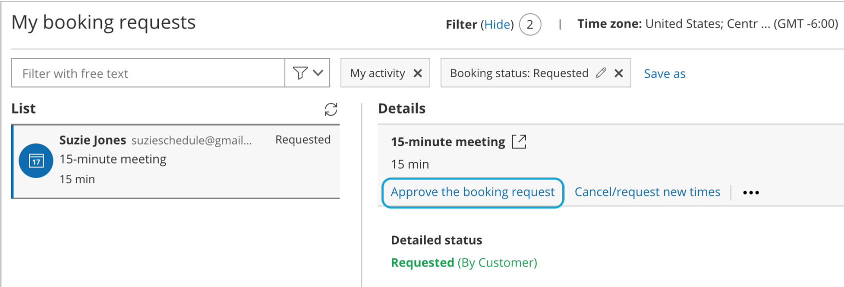


Figure 2: Schedule a booking button

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).

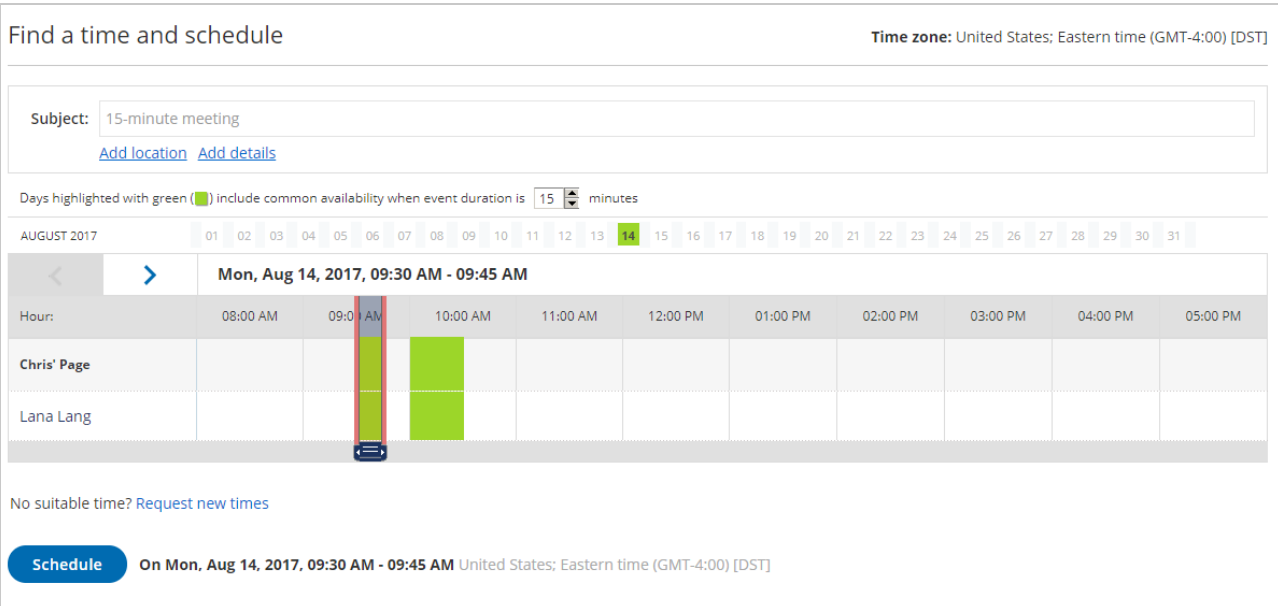


Figure 3: Find a time and schedule

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

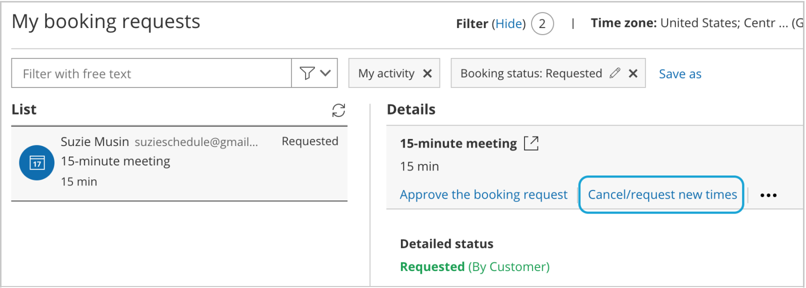


Figure 4: Cancel/request new times button

Learn more about canceling a booking request and requesting new times

User action: Cancelling a booking request [Classic]

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).

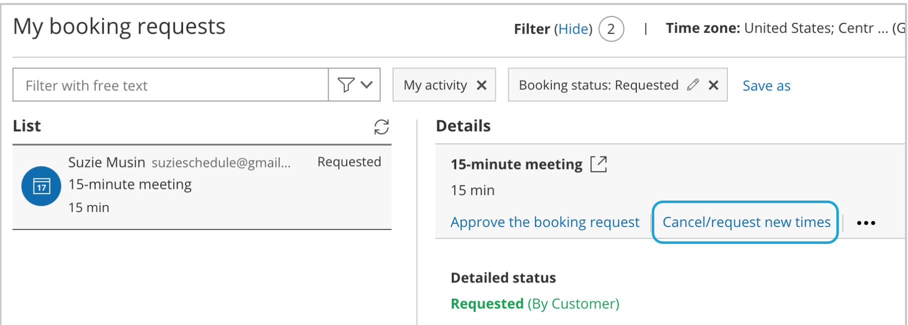


Figure 1: Cancel/request new times button

3. The **Cancel/request new times** pop-up will appear.
4. Select **Cancel the booking request and request new times** (Figure 2).

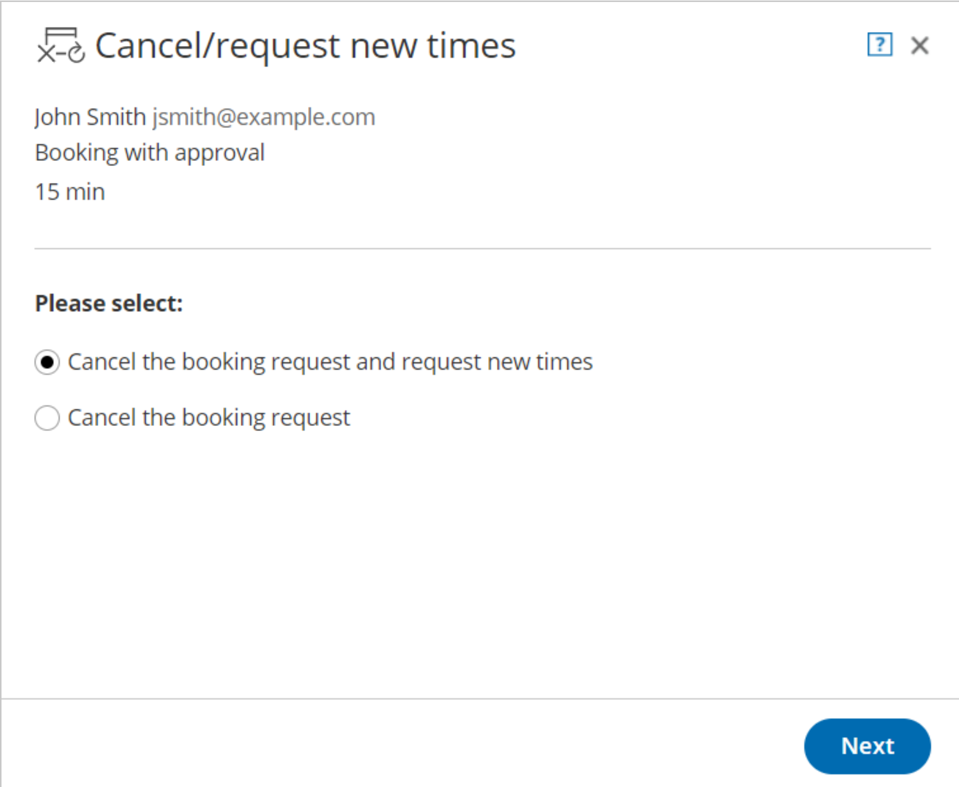


Figure 2: Cancel/request new times pop-up—selection step

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).

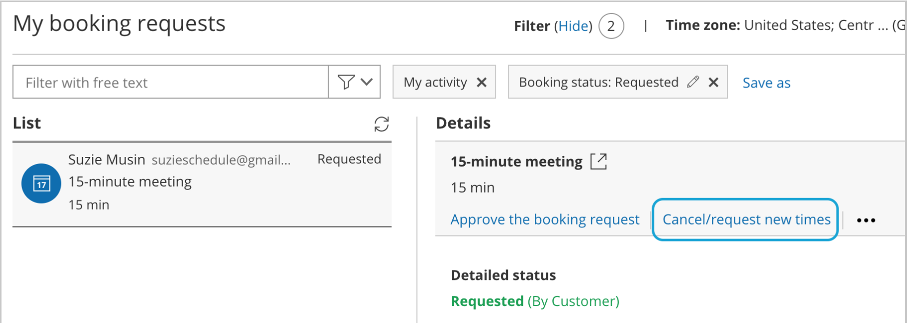


Figure 3: Cancel/request new times button

3. The **Cancel/request new times** pop-up will appear.
4. Select **Cancel the booking request** (Figure 4).

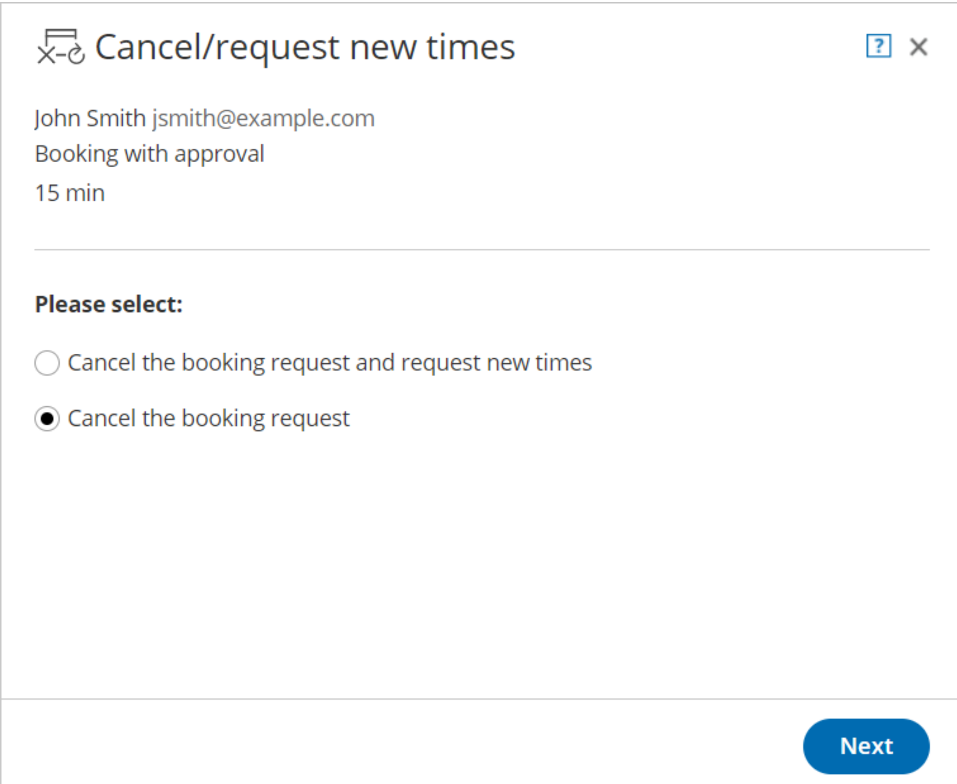


Figure 4: Cancel/request new times pop-up—selection step

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: Cancelling a booking request [Classic]

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).

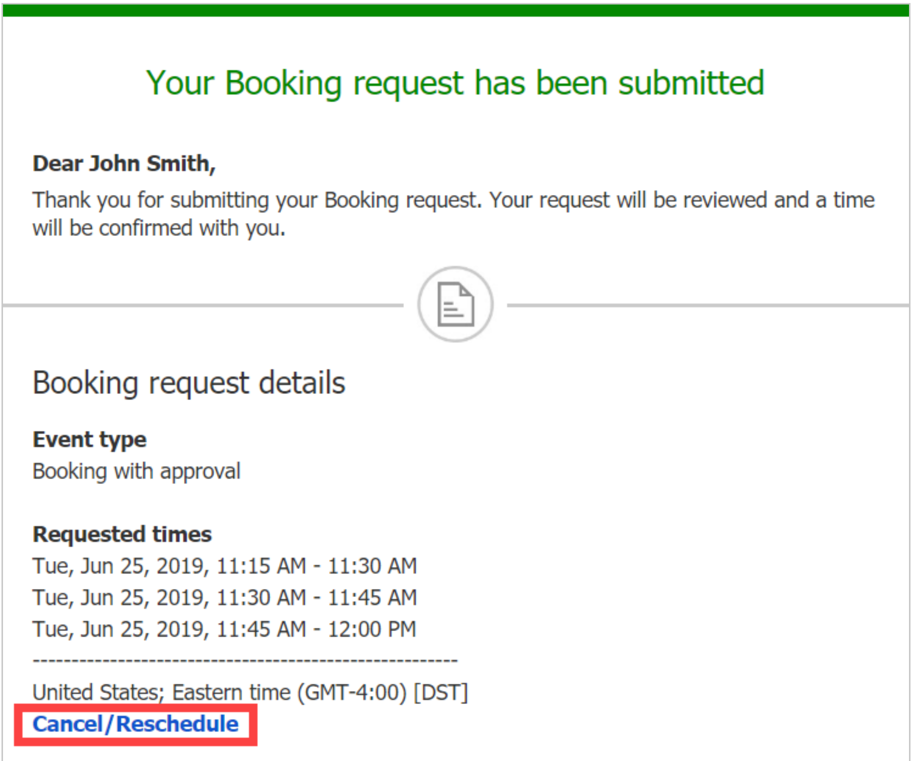


Figure 1: Booking request confirmation email

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.

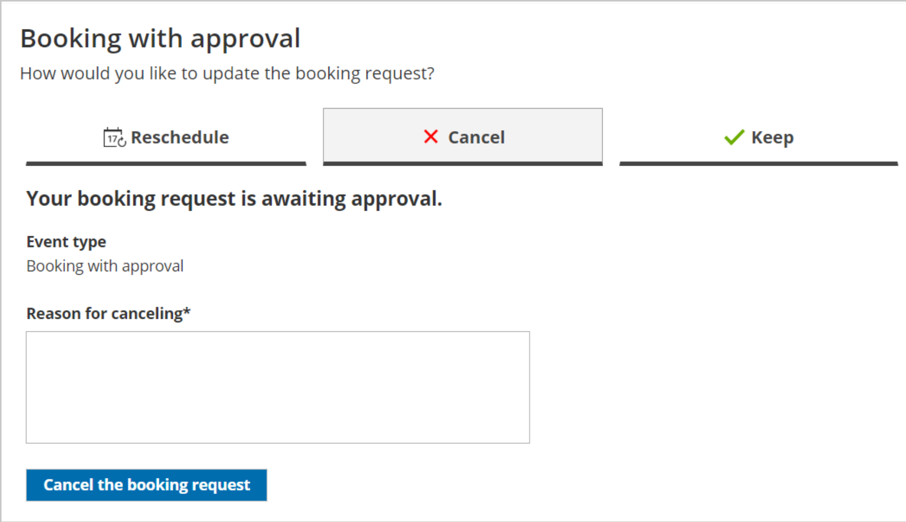


Figure 2: Cancel tab

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 [Classic]

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).

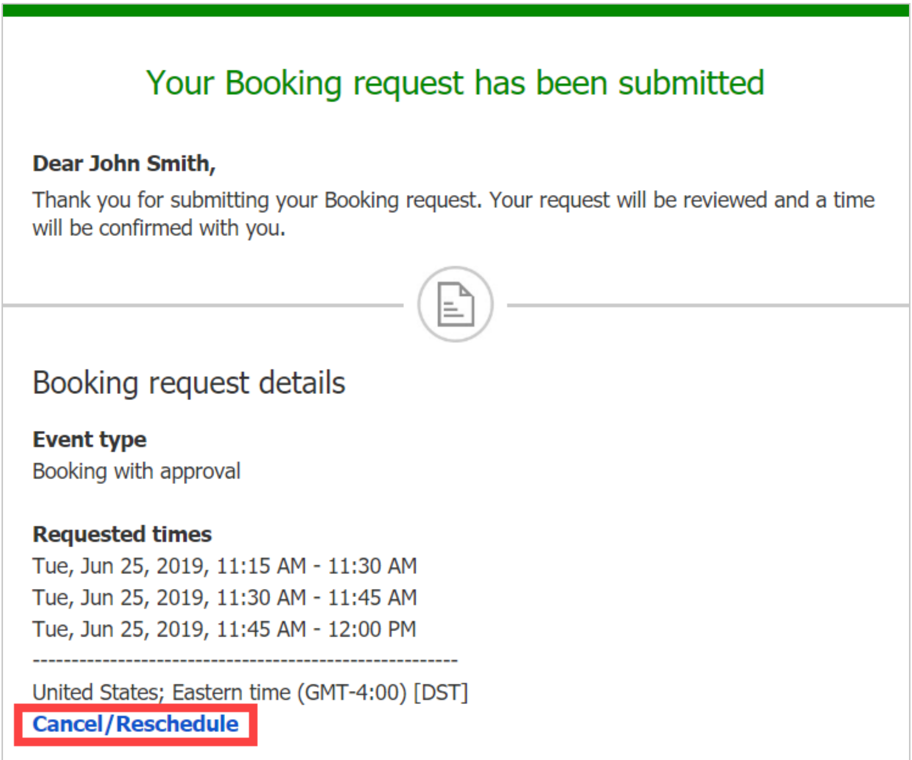


Figure 1: Booking request confirmation email

2. The Cancel/reschedule page will open.
3. On the **Reschedule** tab, the Customer clicks the **See available times** button (Figure 2).

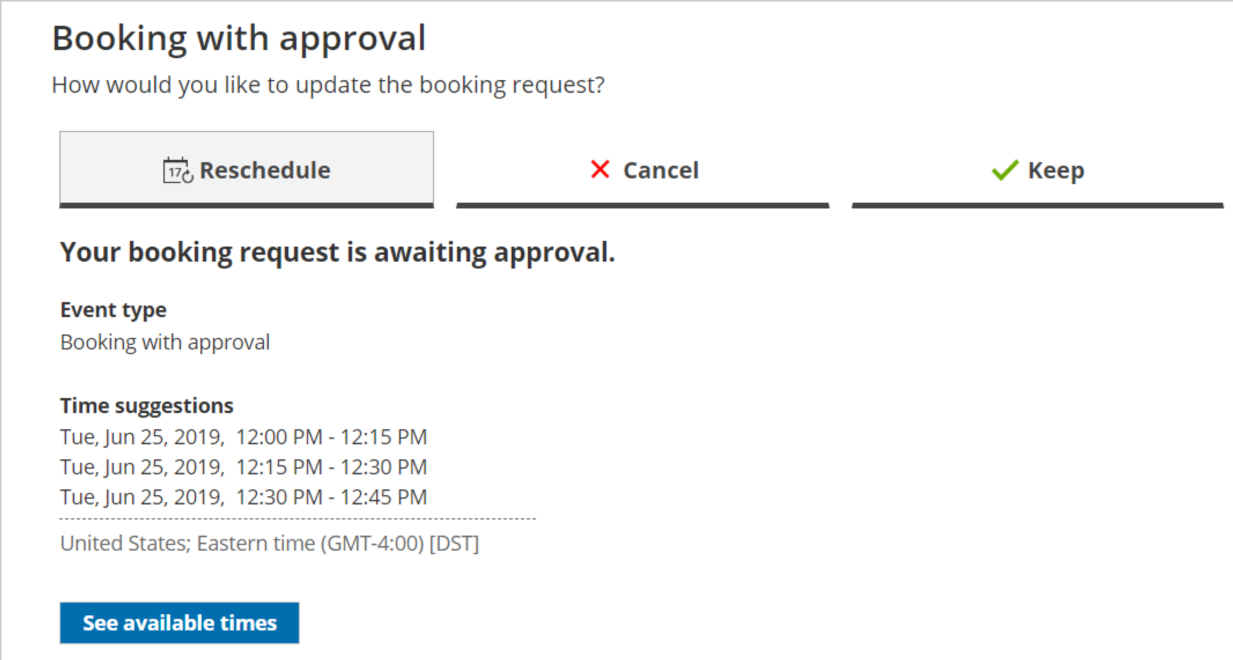


Figure 2: Reschedule tab

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 [Classic]

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

Effects of cancellation [Classic]

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.

Effects of rescheduling [Classic]

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).

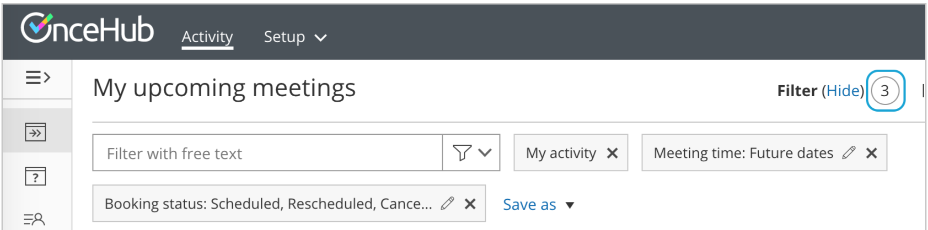


Figure 1: Stream activity counter

- 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.

Reschedule on the Same Booking Page [Classic]

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 Booking pages only

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).

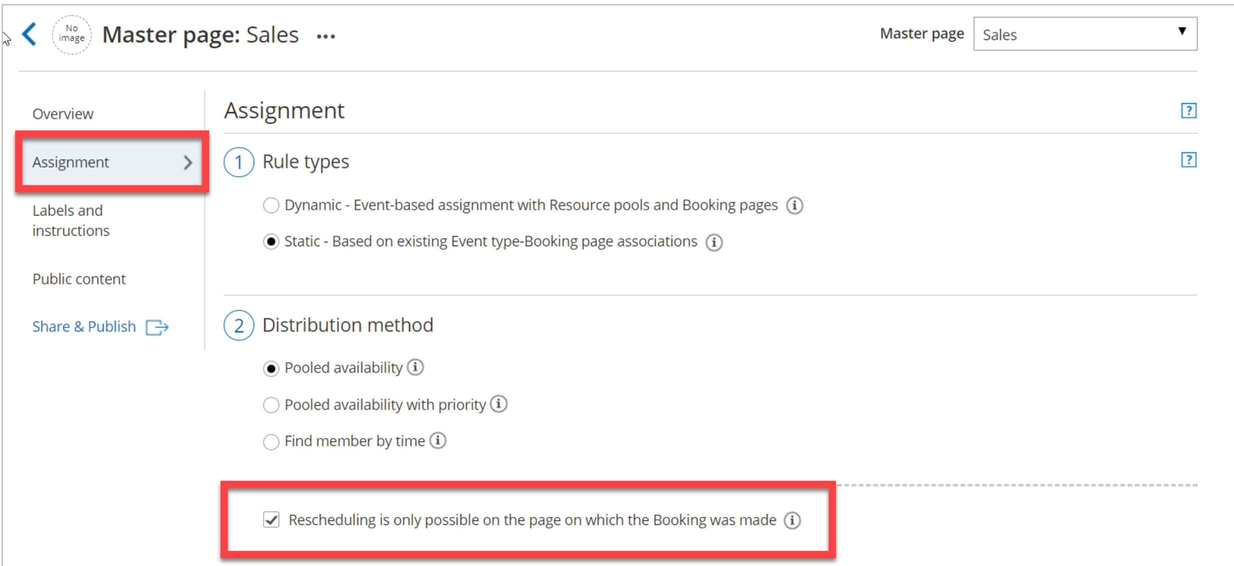


Figure 1: Limiting rescheduling on a Master page which uses Static rules

> **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).

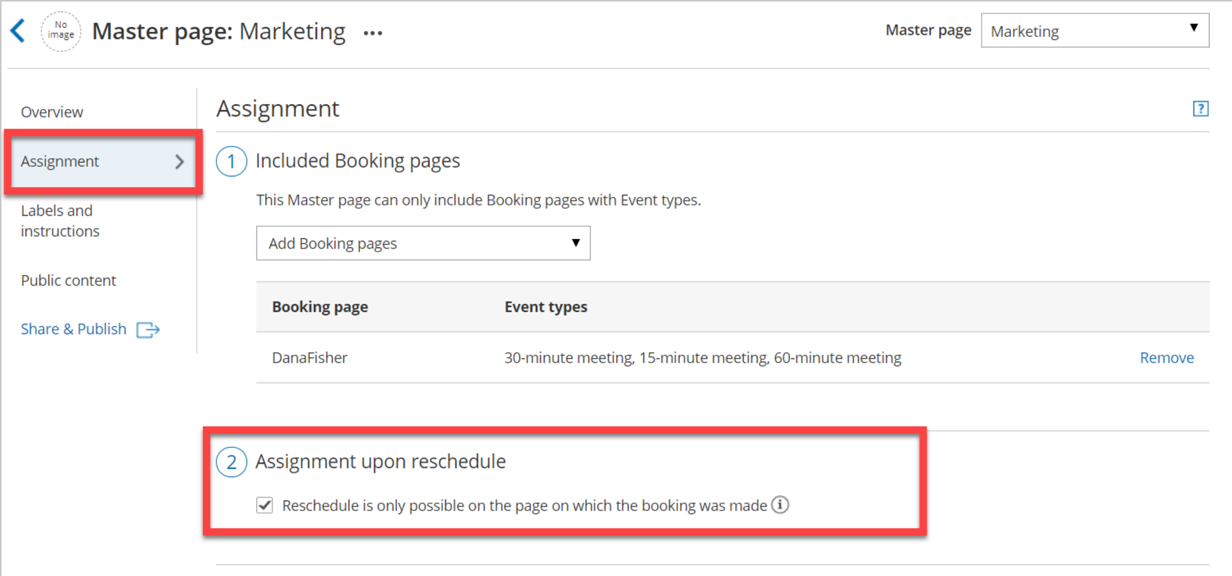


Figure 2: Limiting rescheduling on a Master page using Event types first or Booking pages first

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

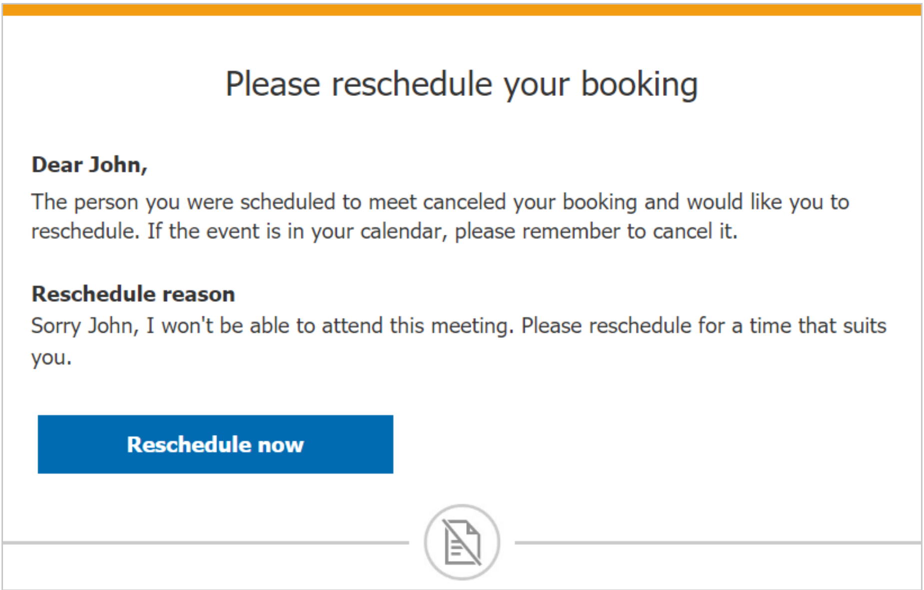


Figure 3: Reschedule request email notification to Customer

Important:

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

The Customer cancel/reschedule page [Classic]

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.

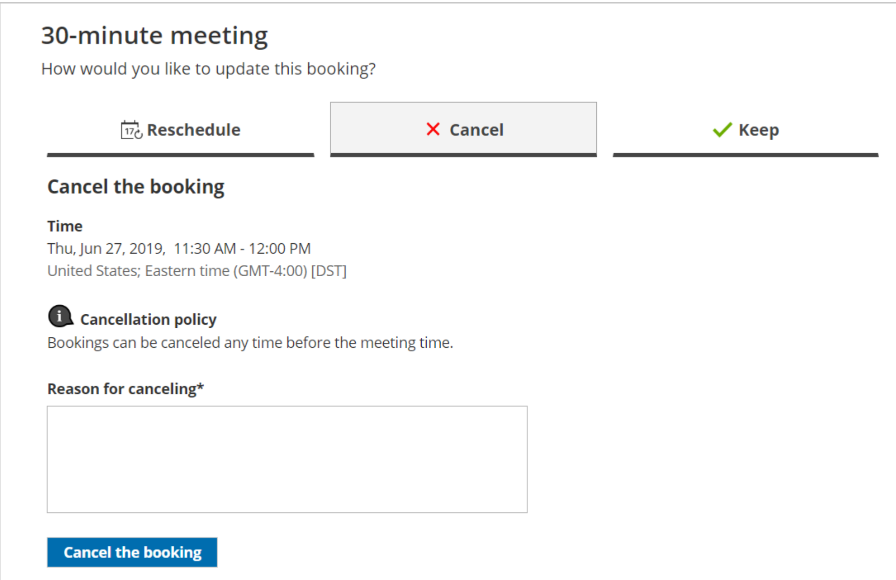


Figure 1: Canceling a booking

> **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).

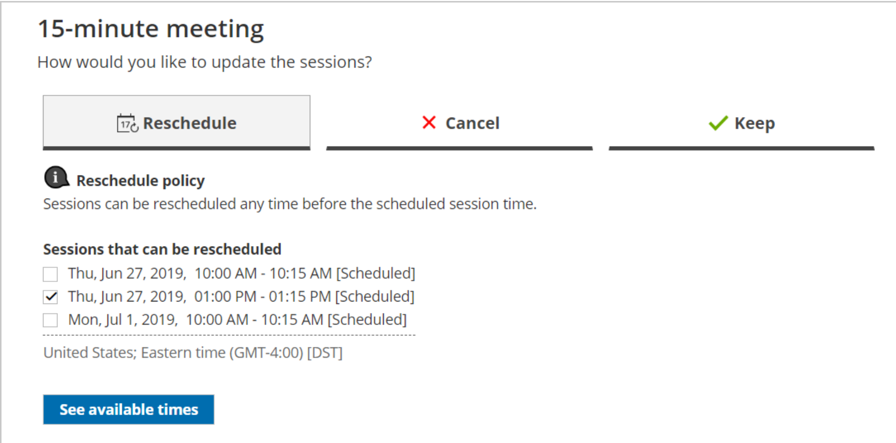


Figure 2: Rescheduling sessions in a package

> **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.

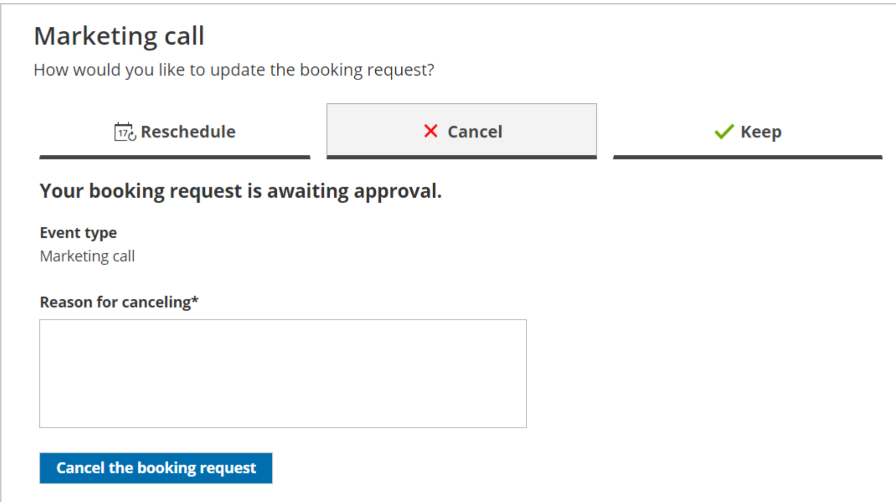


Figure 3: Cancel a booking request

The Customer cancel/reschedule policy [Classic]

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

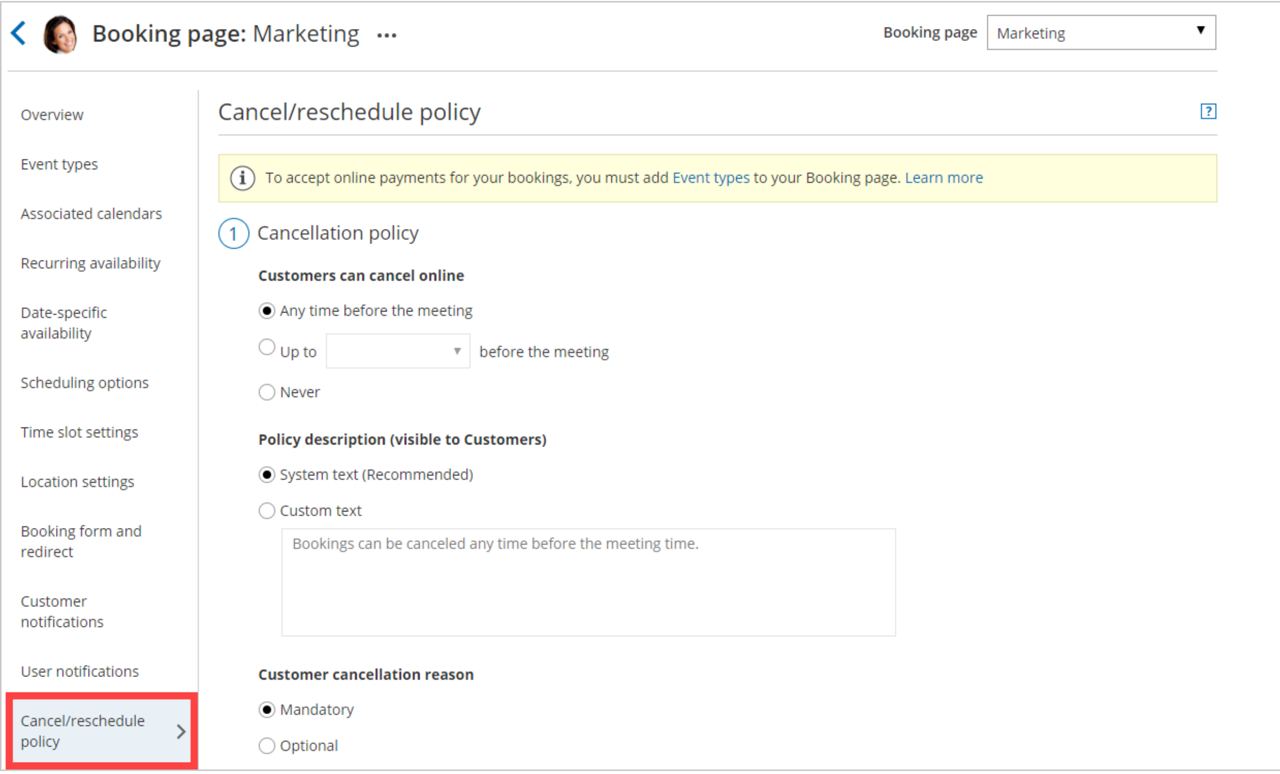


Figure 1: Cancel/reschedule policy on a Booking page not associated with Event types

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

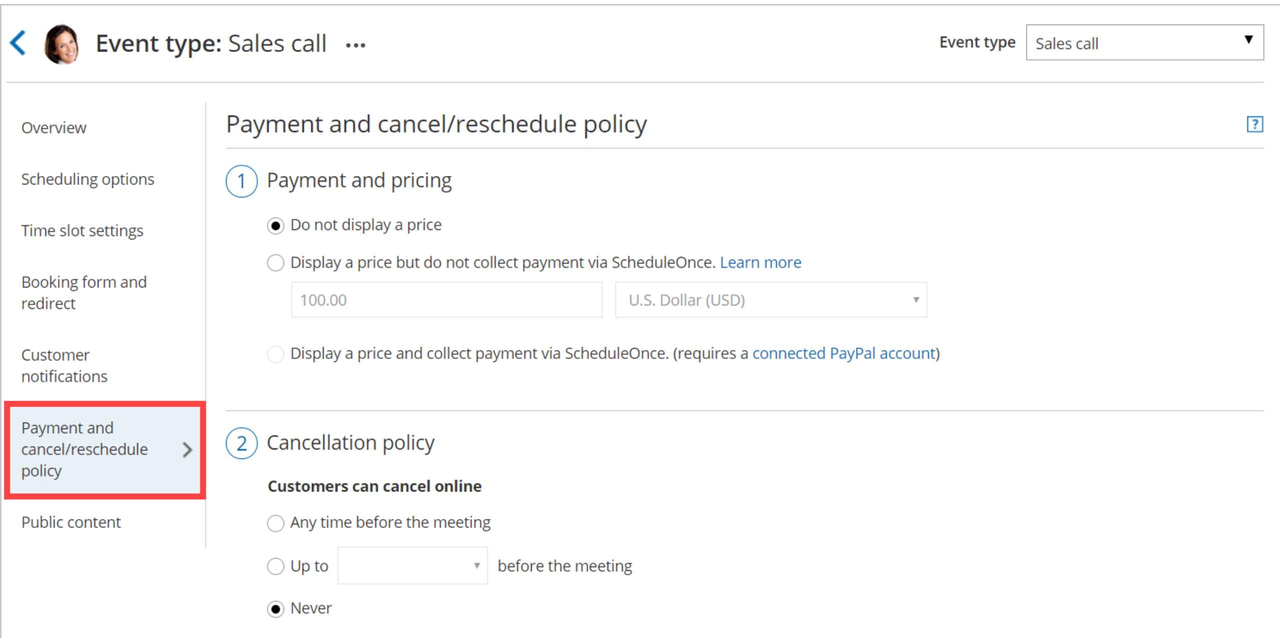


Figure 2: Payment and cancel/reschedule policy section

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

Customer action: Cancel a single booking [Classic]

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.

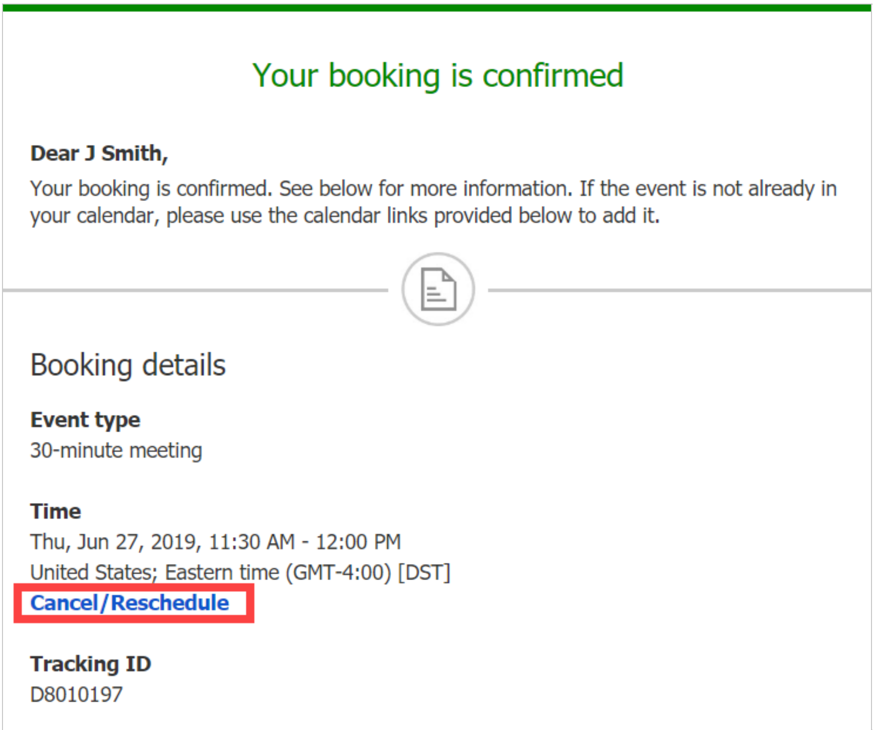


Figure 1: Booking confirmation email

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.

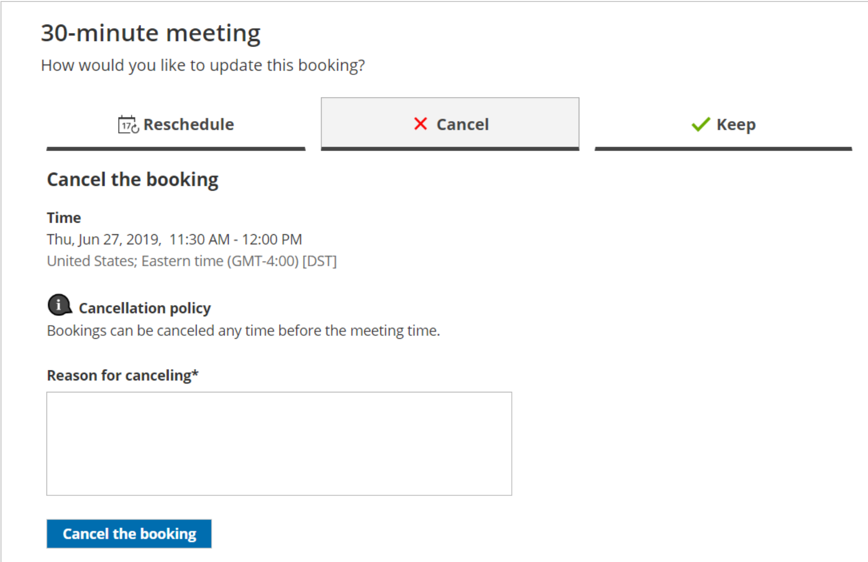


Figure 2: Canceling a booking

> **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 [Classic]

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.

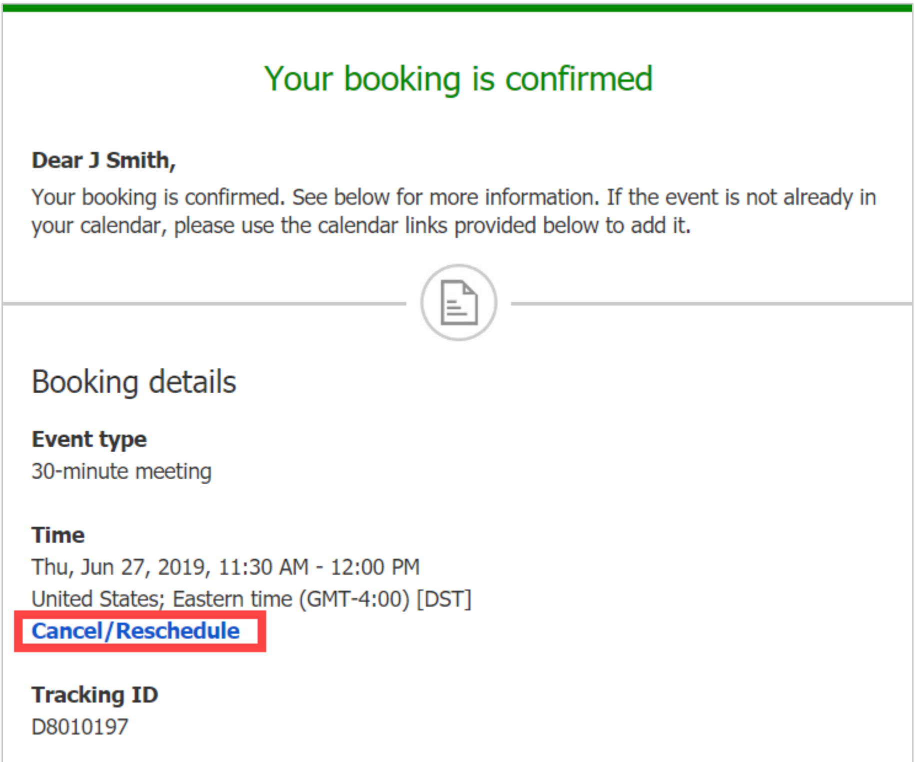


Figure 1: Booking confirmation email

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.

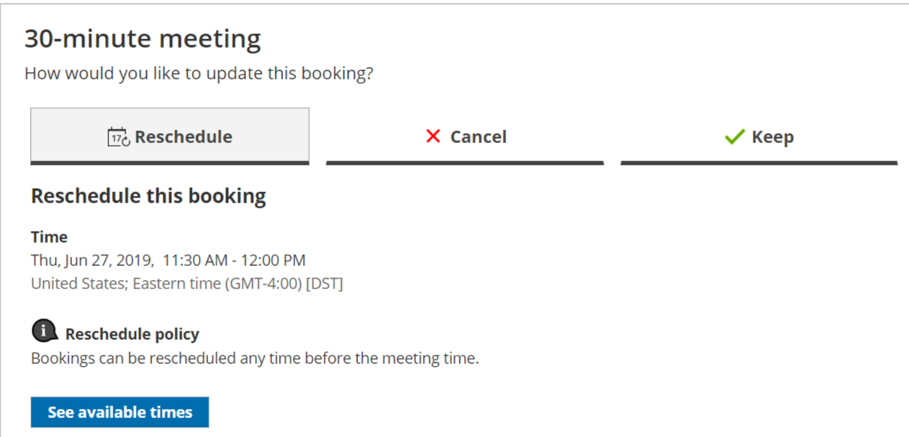


Figure 2: Reschedule tab

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 [Classic]

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.

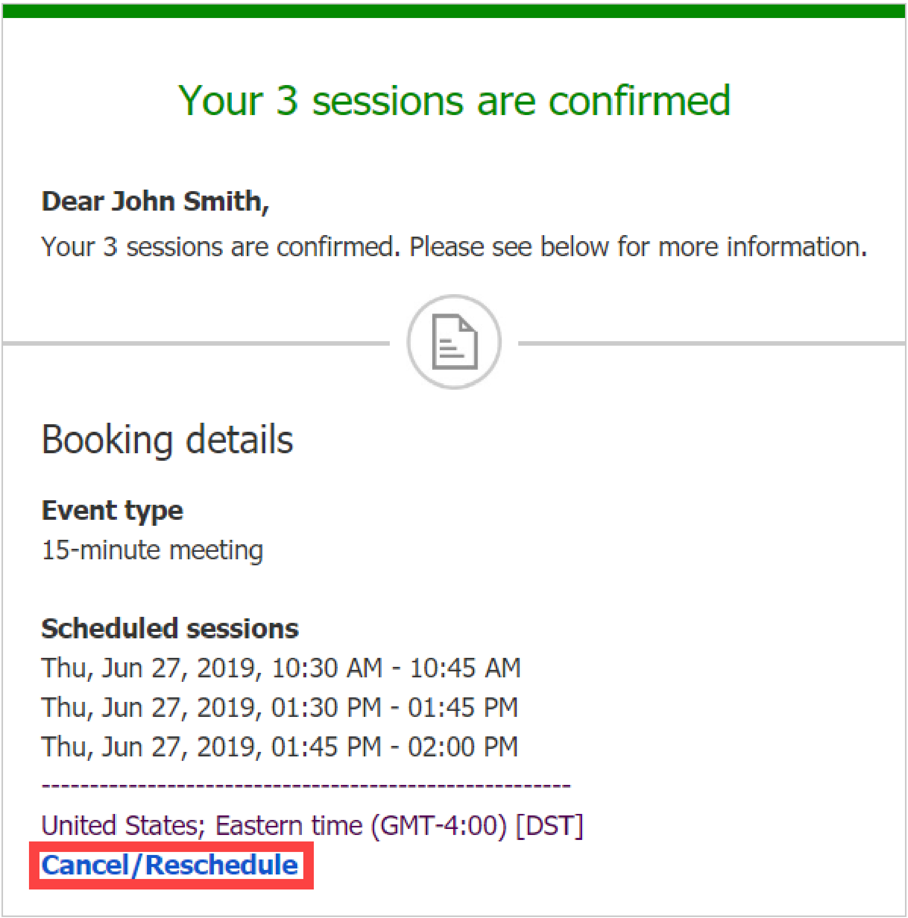


Figure 1: Booking confirmation email

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.

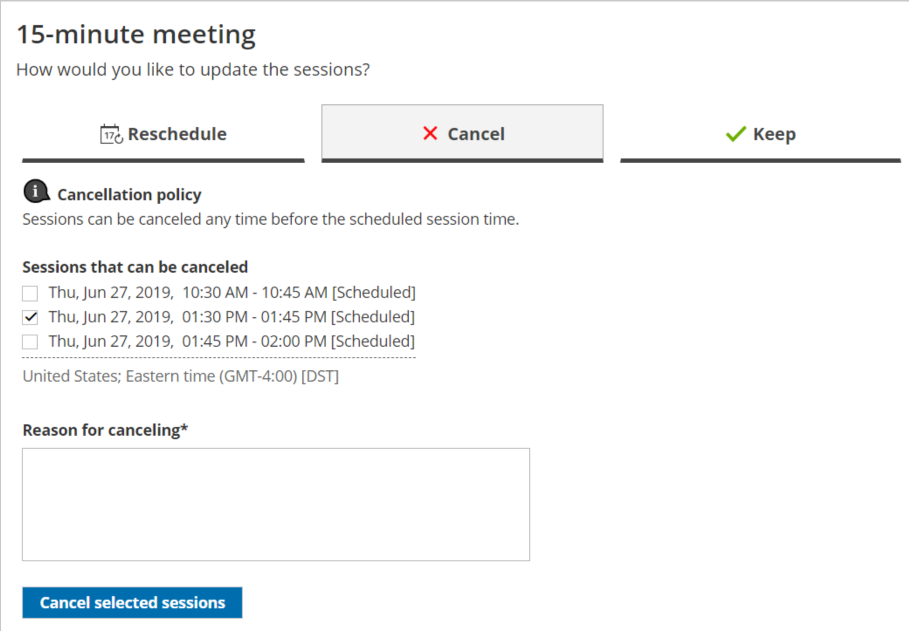


Figure 2: Cancel tab

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 [Classic]

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.

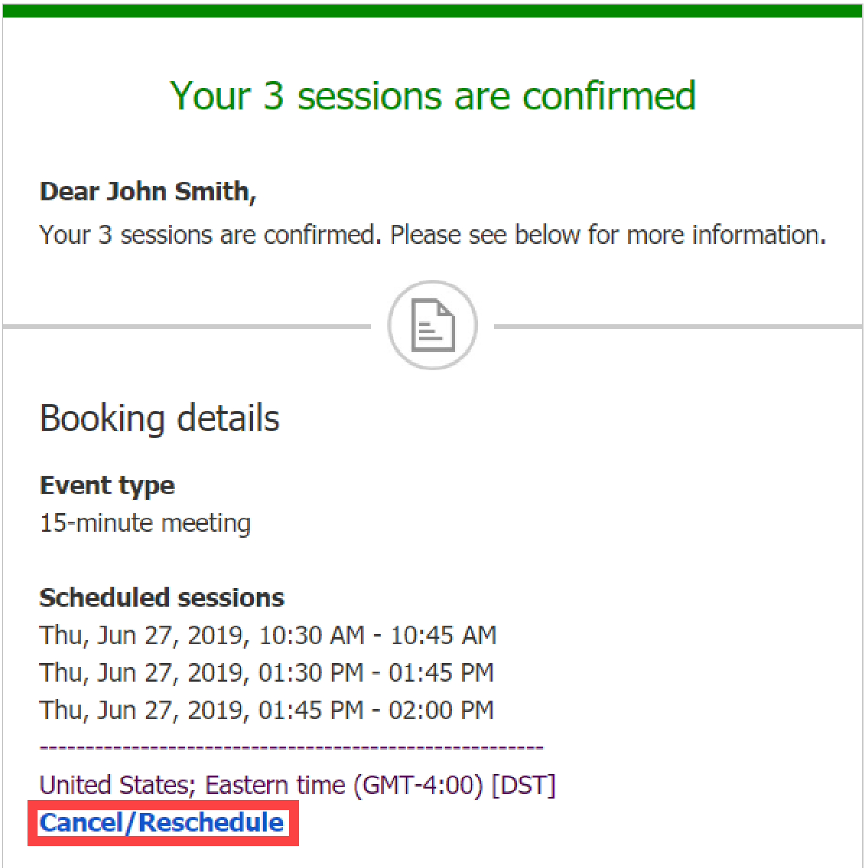


Figure 1: Booking confirmation email

2. The Cancel/reschedule page will open.
3. In the **Reschedule** tab, the Customer selects the sessions to be rescheduled (Figure 2).

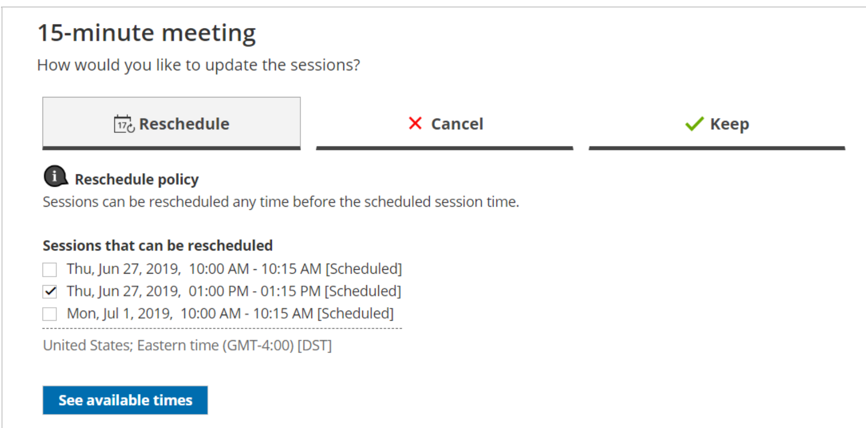


Figure 2: Rescheduling sessions in a package

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 [Classic]

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.

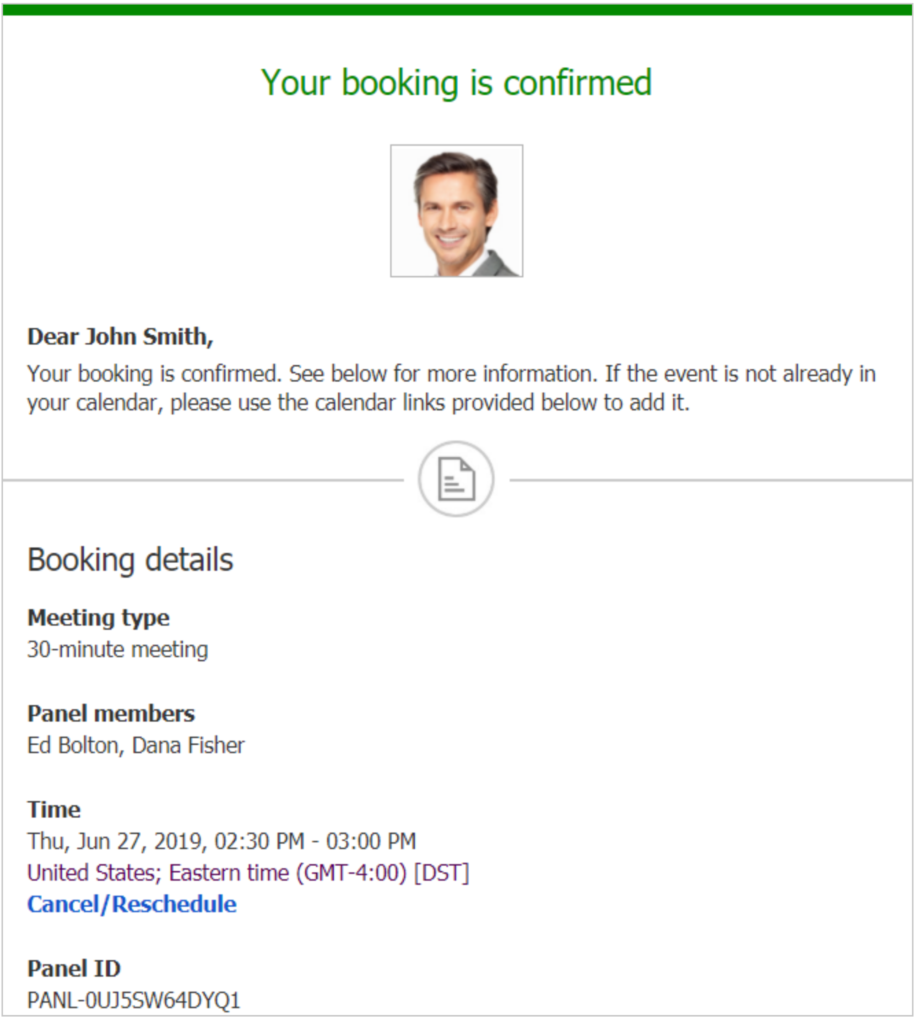


Figure 1: Booking confirmation email

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.

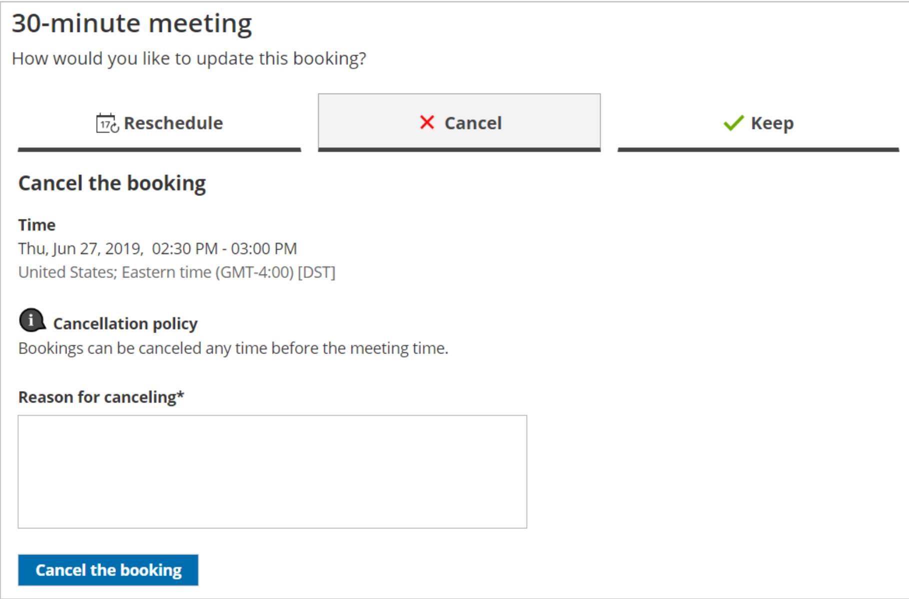


Figure 2: Cancel tab

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 [Classic]

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.

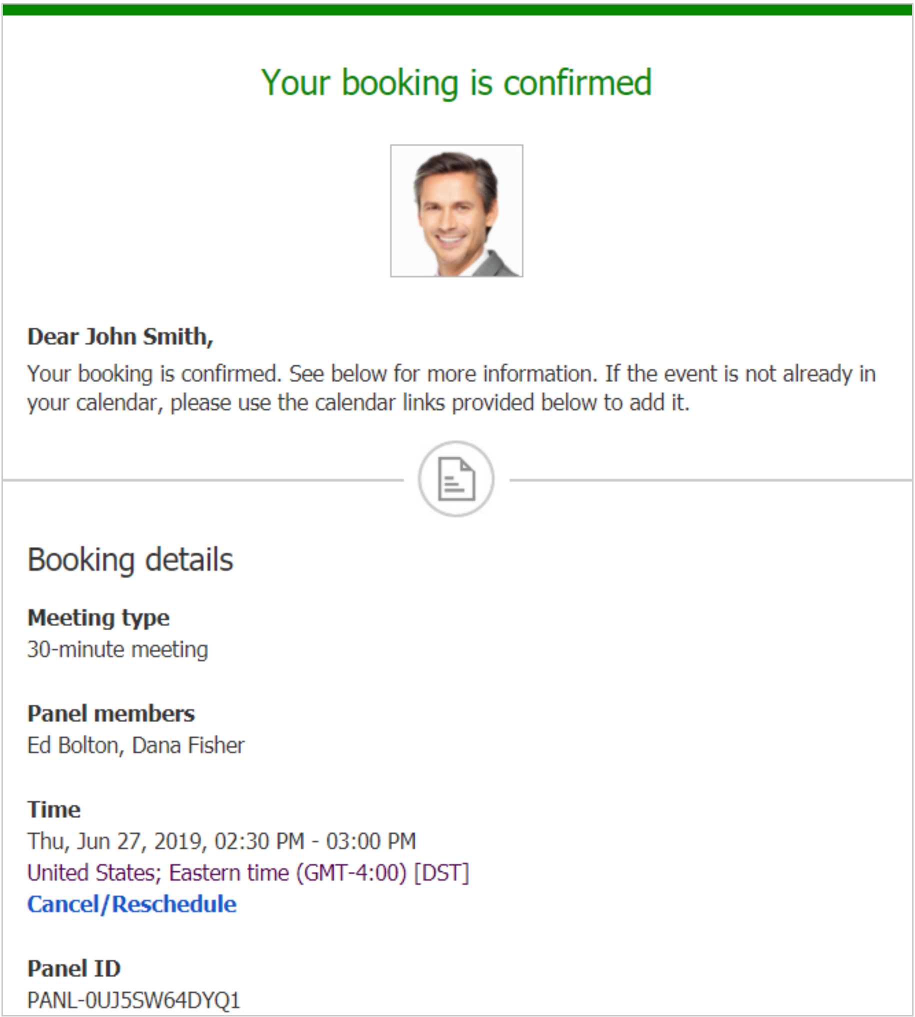


Figure 1: Booking confirmation email

2. The Cancel/reschedule page will open.
3. In the **Reschedule** tab, the Customer clicks the **See available times** button (Figure 2).

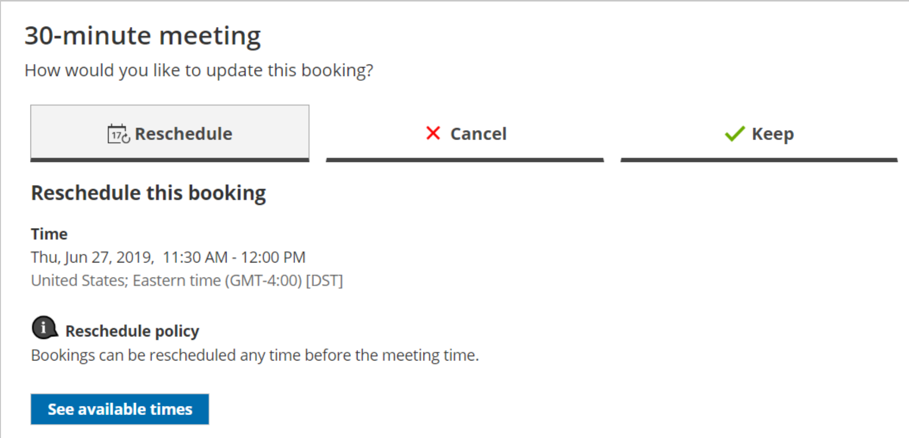


Figure 2: Reschedule tab

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/reschedule for Booking pages with Event types [Classic]

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).

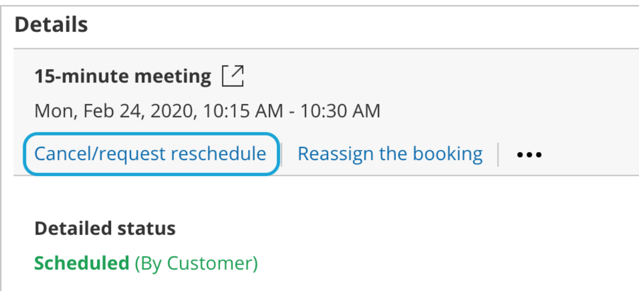


Figure 1: Cancel/request reschedule button

3. The **Cancel/request reschedule** pop-up will appear (Figure 2).

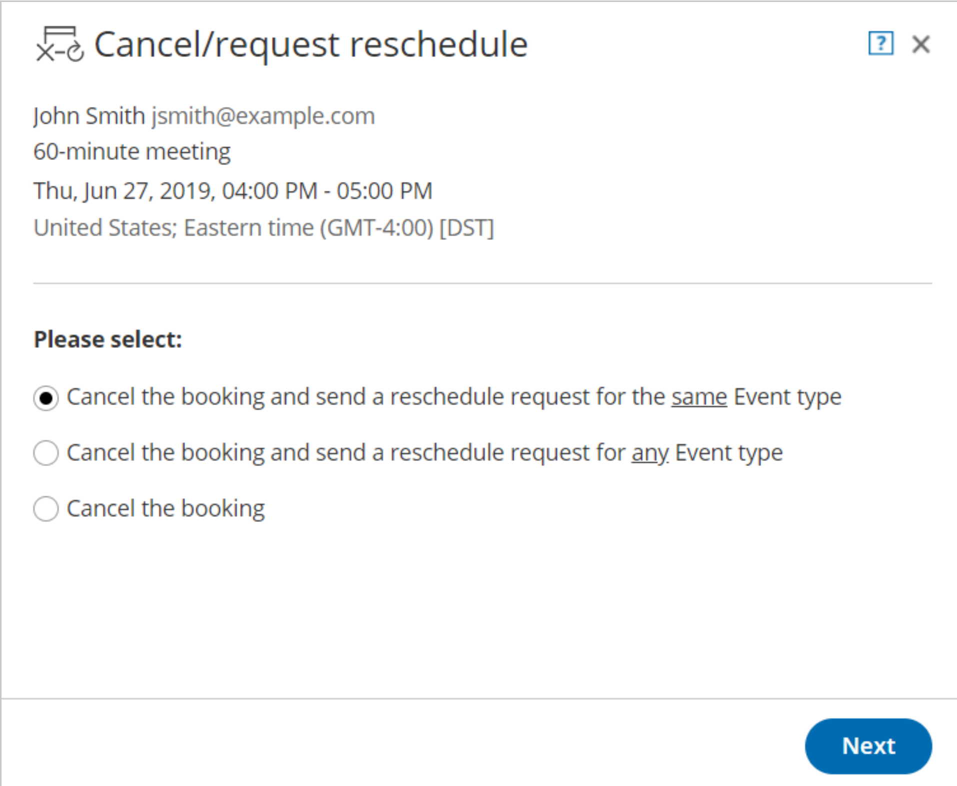


Figure 2: Cancel/request reschedule pop-up—Selection step

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.

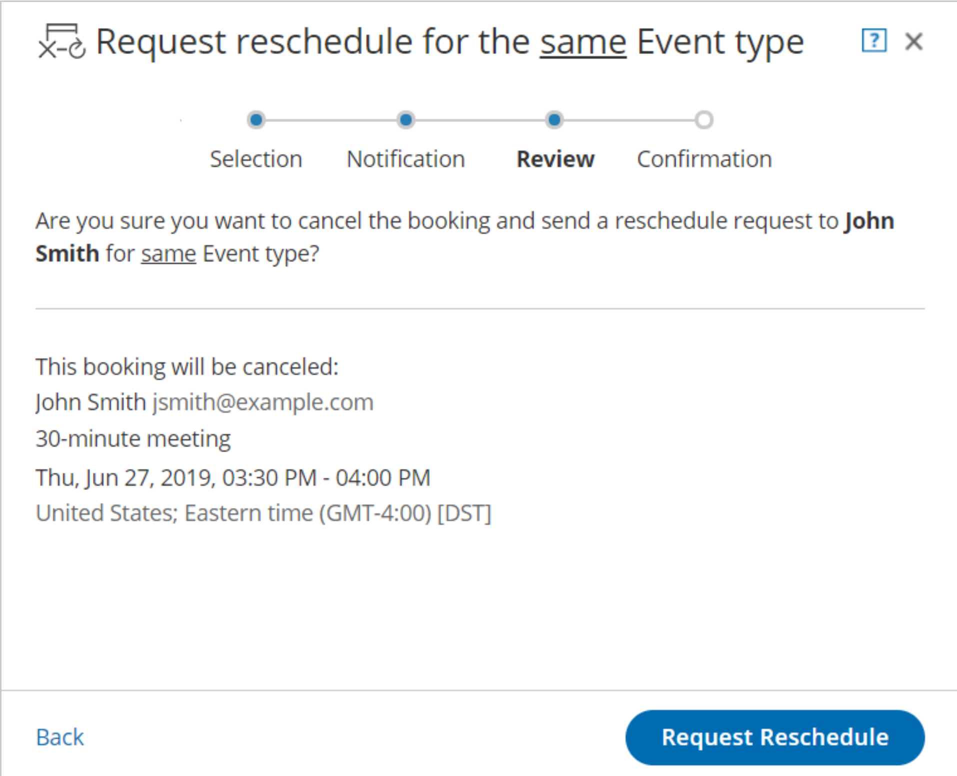


Figure 3: Cancel/request reschedule pop-up—Review step

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).

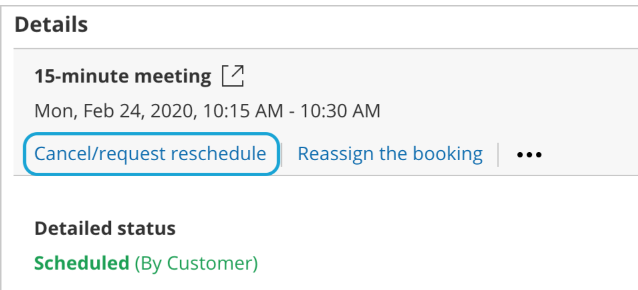


Figure 4: Cancel/request reschedule button

3. The **Cancel/request reschedule** pop-up will appear.

4. Select **Cancel the booking** (Figure 5).

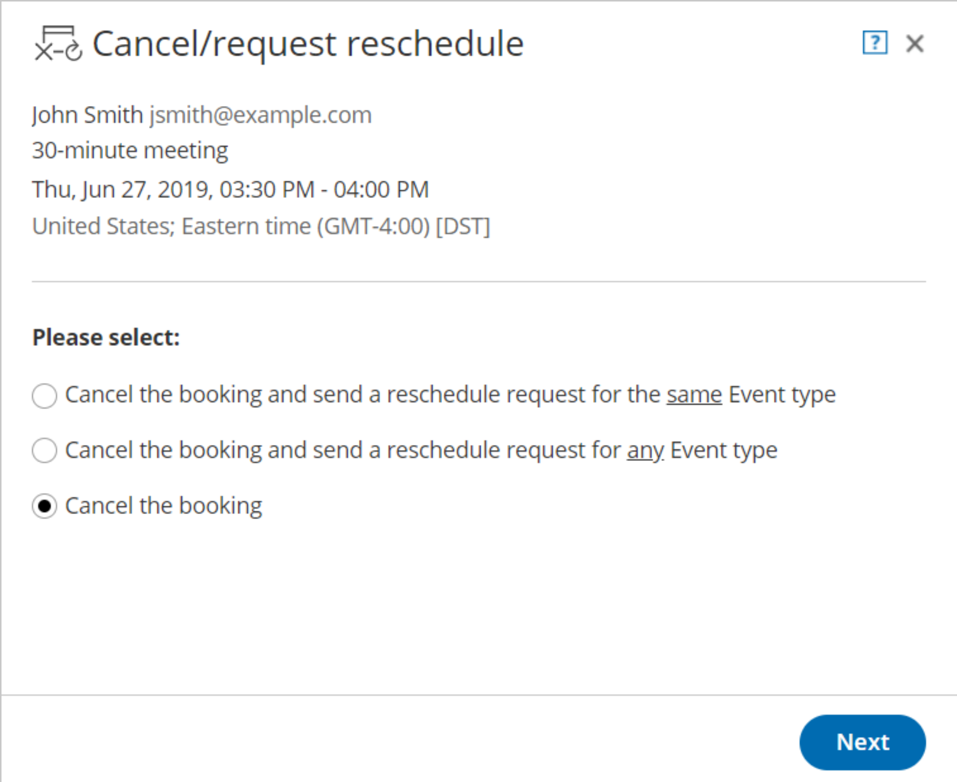


Figure 5: Cancel/request reschedule pop-up—Selection step

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/reschedule for Booking pages without Event types [Classic]

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).

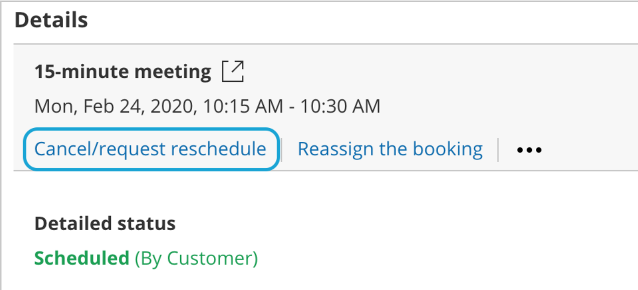


Figure 1: Cancel/request reschedule button

3. The **Cancel/request reschedule** pop-up will appear (Figure 2).

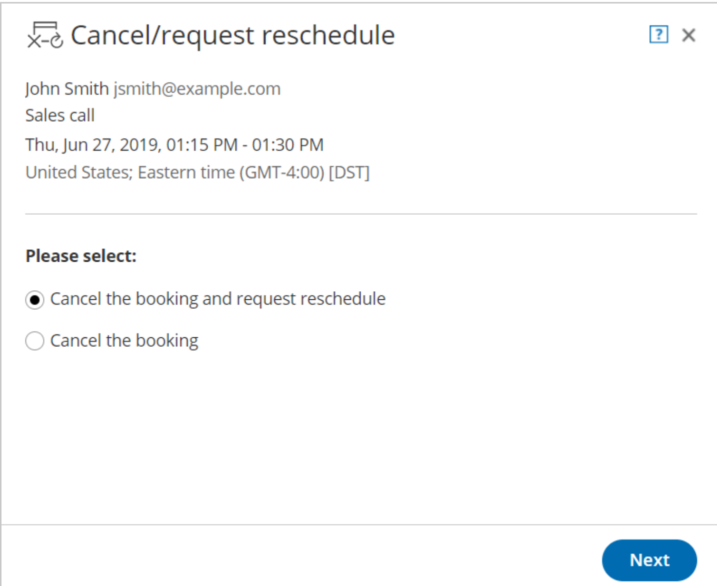


Figure 2: Cancel/request new times pop-up

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.

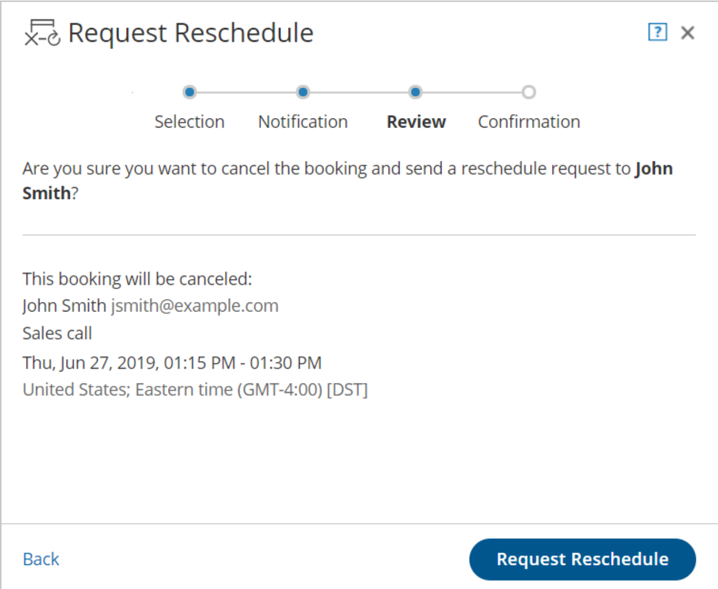


Figure 3: Cancel/request reschedule pop-up—Review step

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).

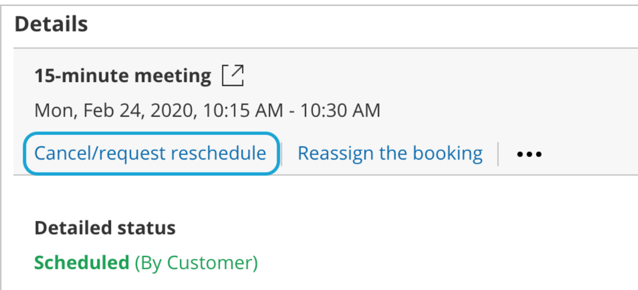


Figure 4: Cancel/request new times button

3. The **Cancel/request reschedule** pop-up will appear.
4. From the **Cancel/request reschedule** pop-up, select **Cancel the booking** (Figure 5).

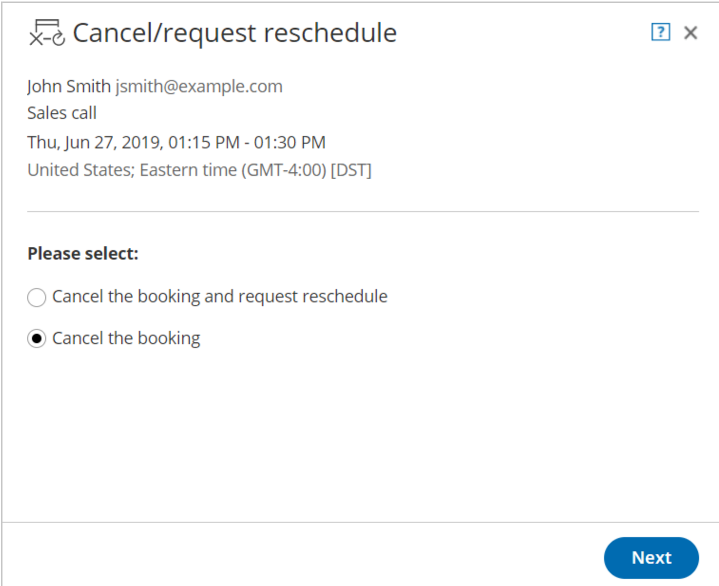


Figure 5: Cancel/request reschedule pop-up

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 [Classic]

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).

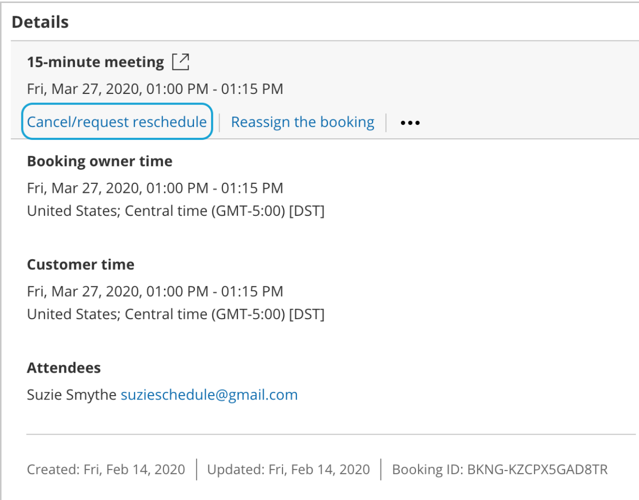


Figure 1: Cancel/request reschedule button

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.

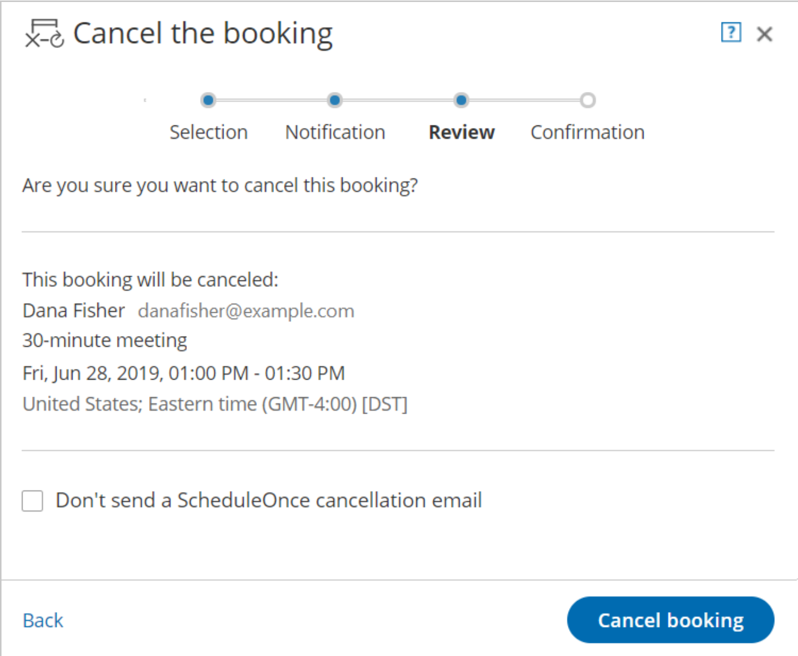


Figure 3: Cancel/request reschedule pop-up—Review step

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: Reschedule a Panel meeting [Classic]

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).

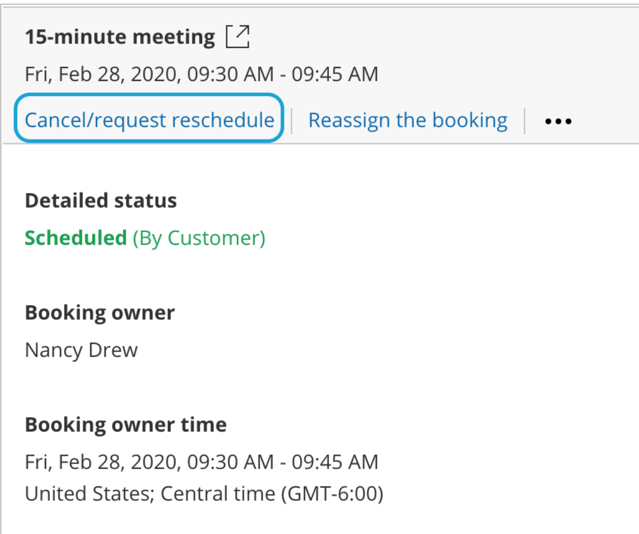


Figure 1: Cancel/request new times button

3. The Cancel/request reschedule pop-up appears (Figure 2). Select **Cancel the booking and send a reschedule request for the same Event type.**

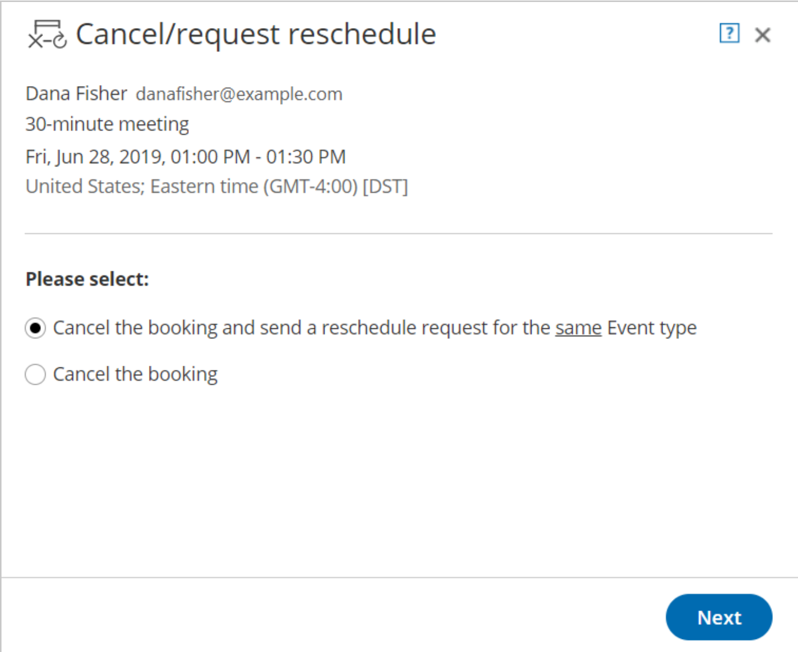


Figure 2: Cancel/request reschedule pop-up—Selection step

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.

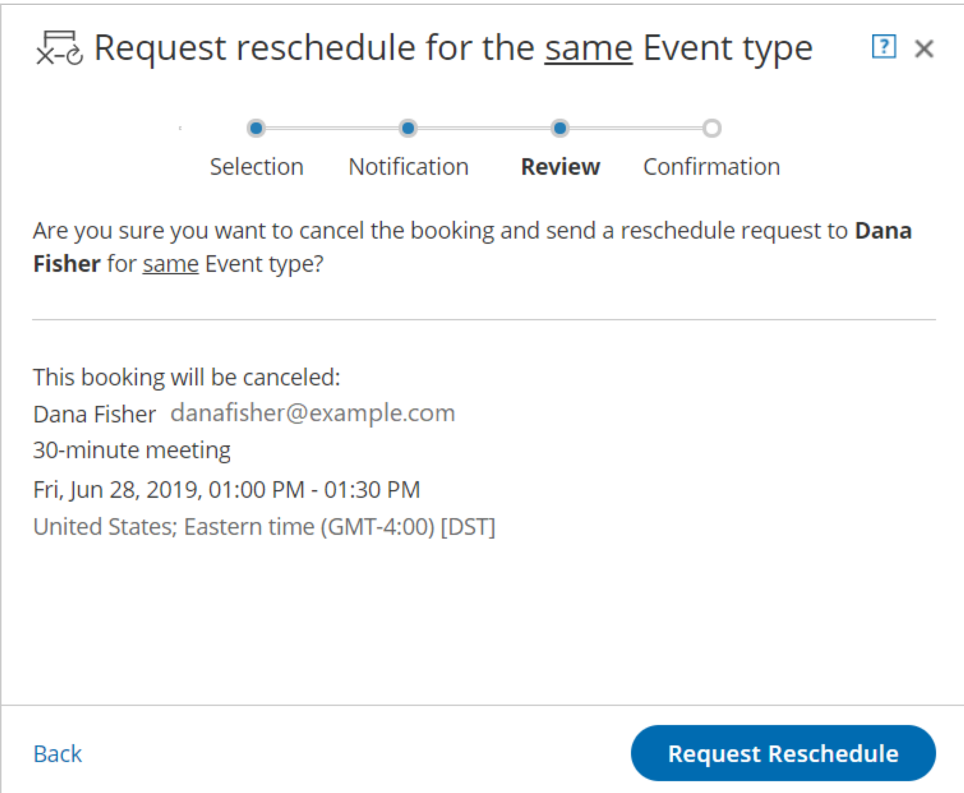


Figure 3: Cancel/request reschedule pop-up—Review step

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/reschedule in Google Calendar [Classic]

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**.

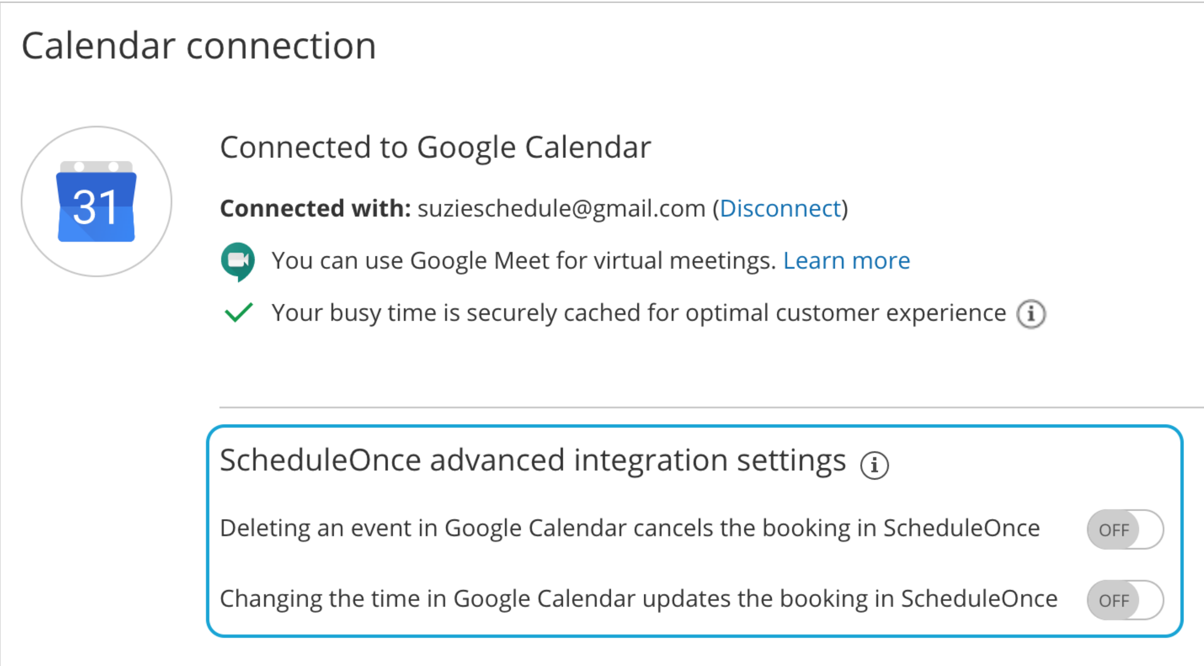


Figure 1: Calendar connection—OnceHub advanced integration settings

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

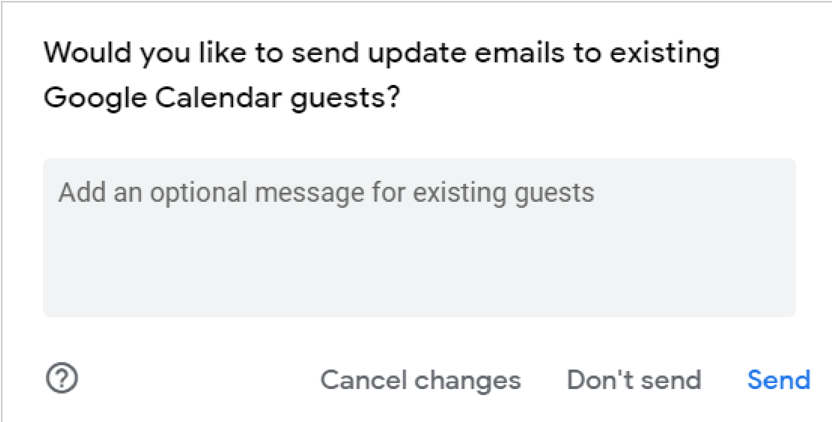


Figure 2: Send updates to Calendar guests

User action: Cancel/reschedule in Office 365 Calendar [Classic]

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**.

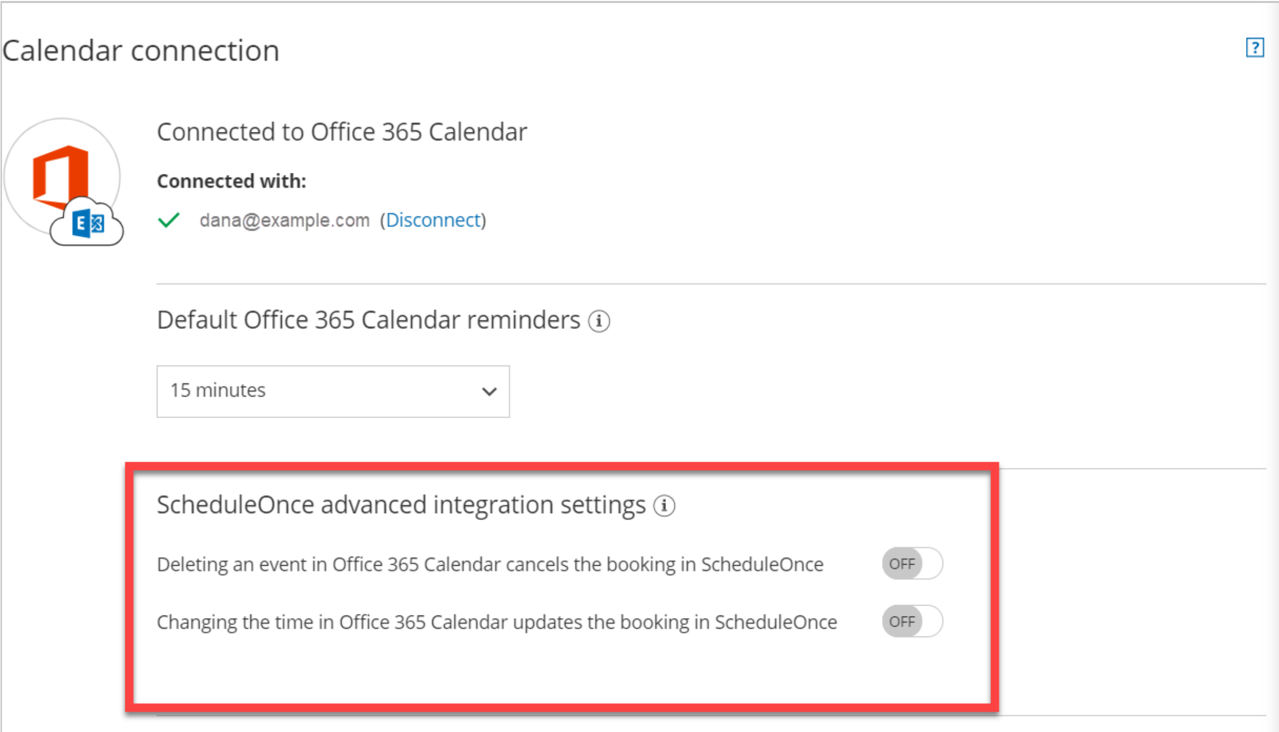


Figure 1: Calendar connection—OnceHub advanced integration settings

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/reschedule in Exchange/Outlook Calendar [Classic]

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**.

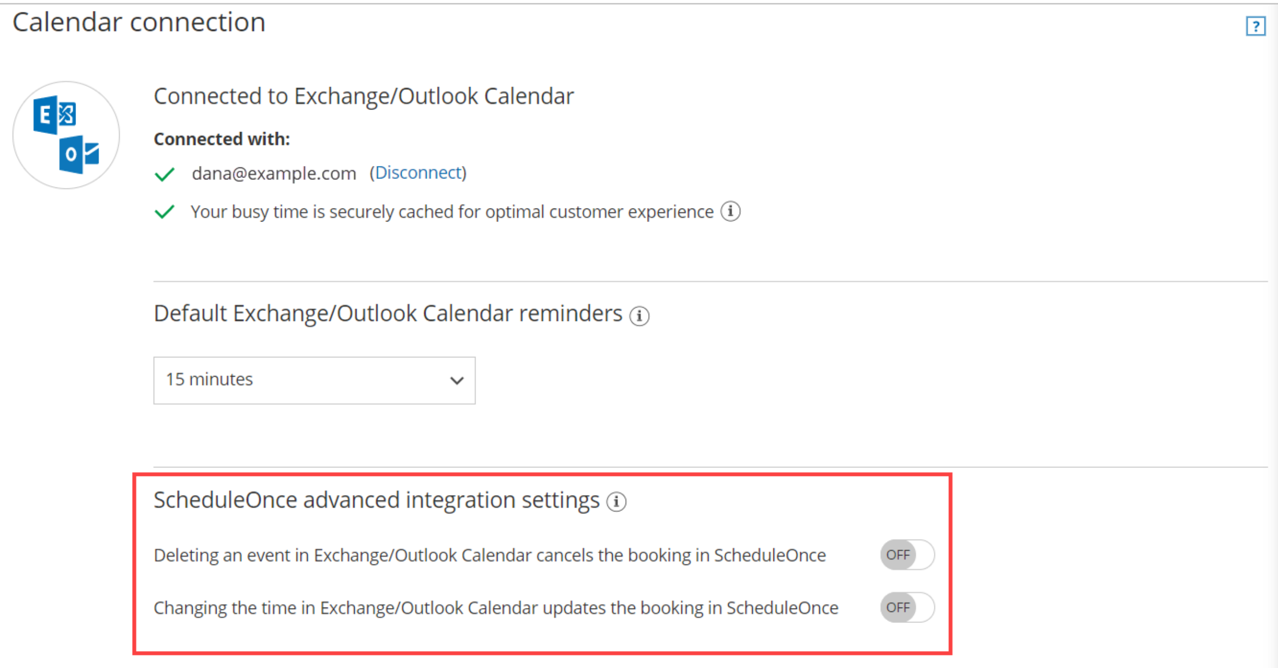


Figure 1: Calendar connection—OnceHub advanced integration settings

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.

Introduction to Booking reassignment [Classic]

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

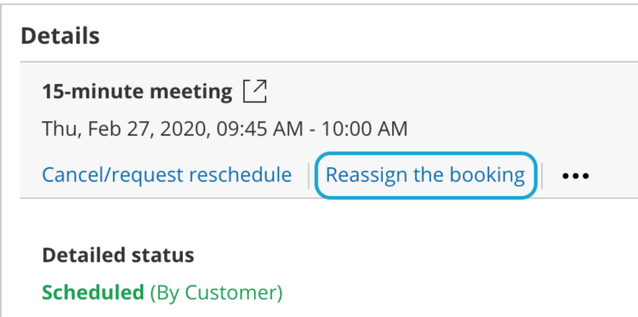


Figure 1: Reassign the booking

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.

Effects of Booking reassignment [Classic]

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.

User action: Reassign a booking [Classic]

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).

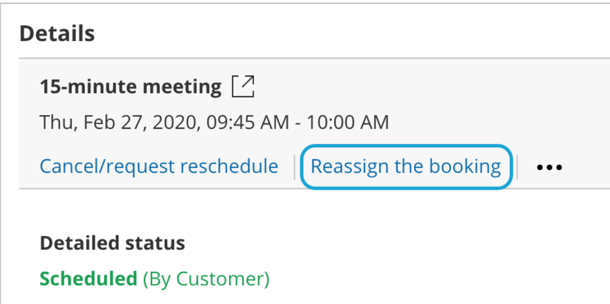


Figure 1: Reassign the booking

> **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.

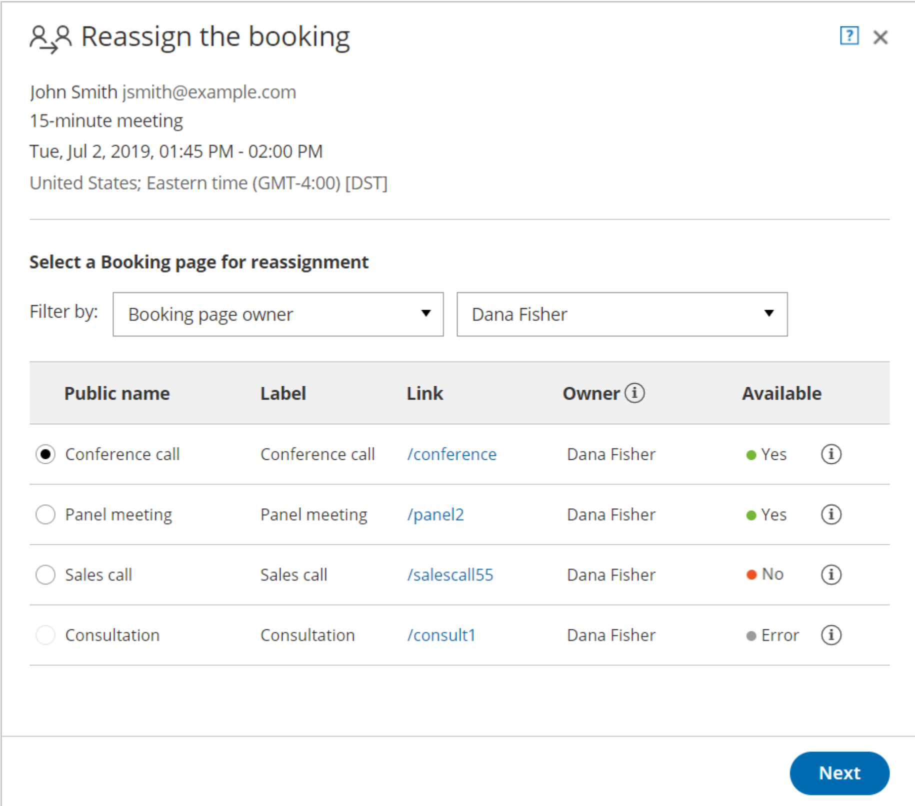


Figure 2: Reassign the booking pop-up

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 [Classic]

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.

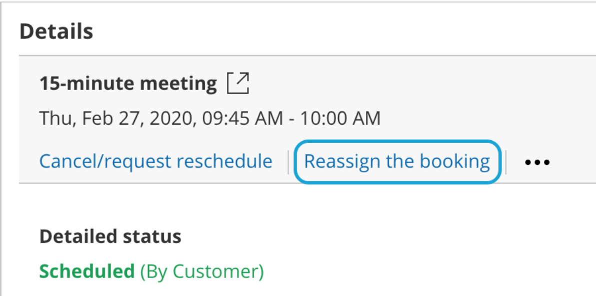


Figure 1: Reassign the booking

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.

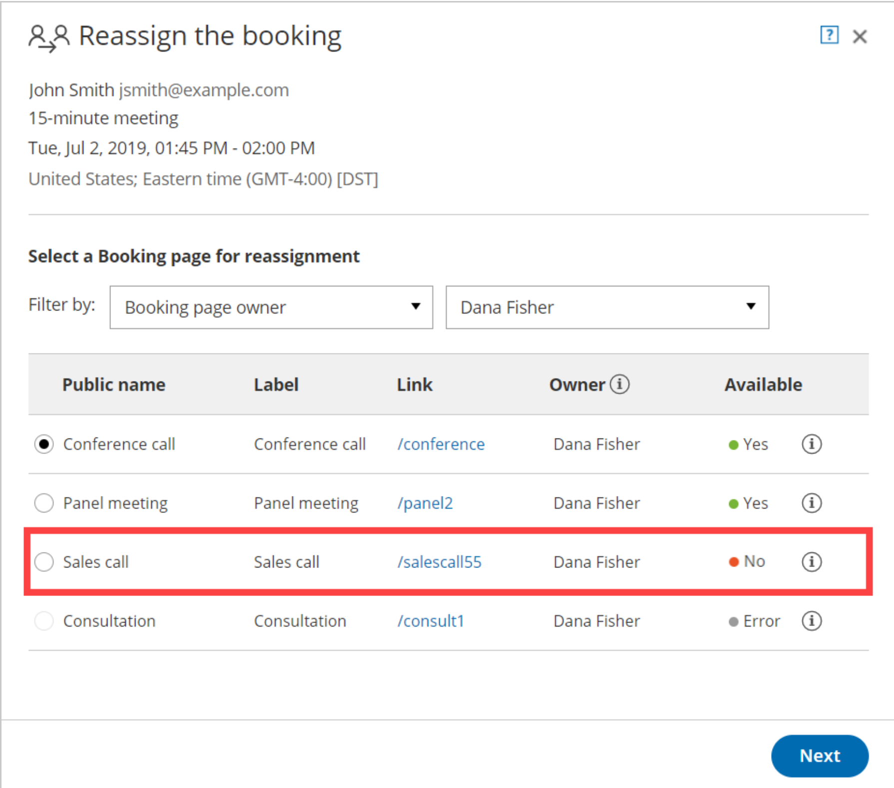


Figure 2: Reassign the booking pop-up

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.

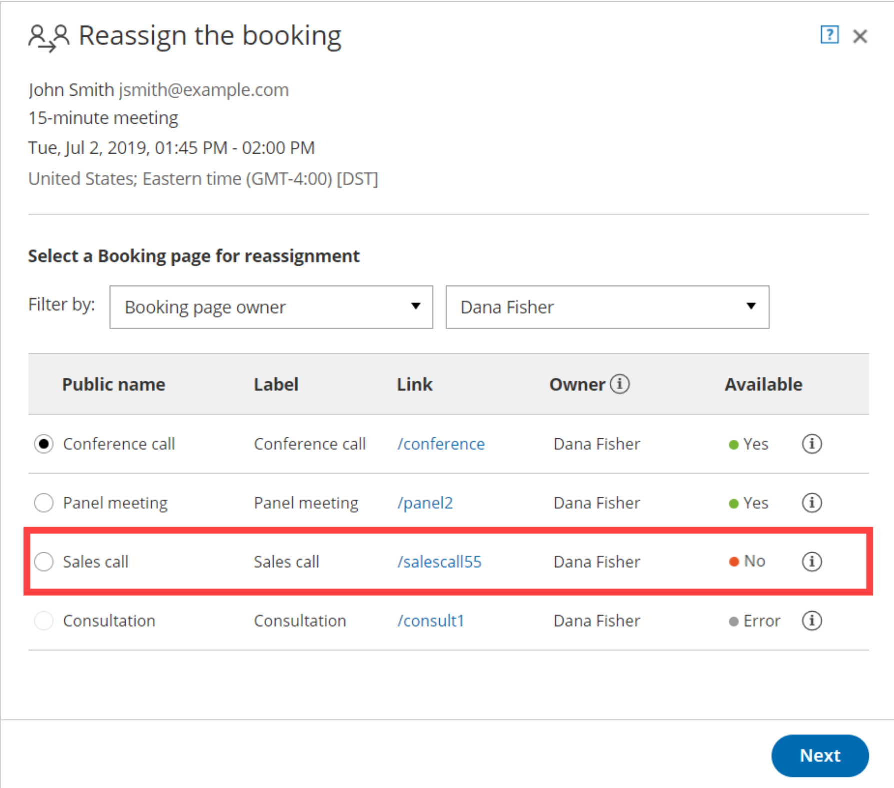


Figure 3: Reassign the booking pop-up

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).

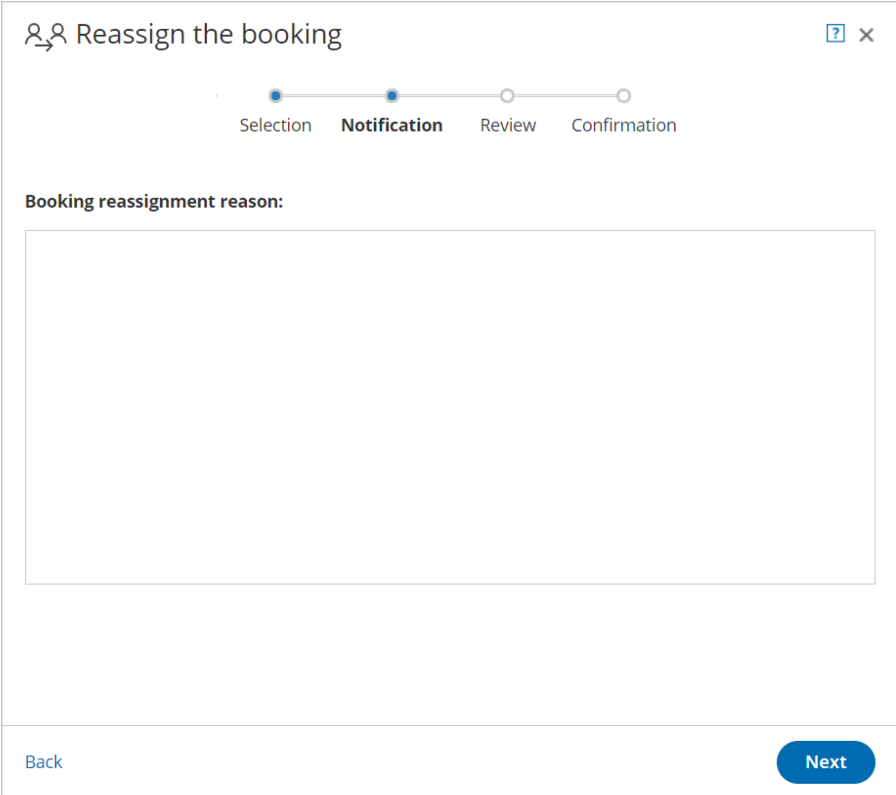


Figure 4: Reassign the booking pop-up—Notification step

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 [Classic]

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.
- The Booking page has no Booking with approval Event types associated with it.

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.

The Activity stream: Viewing activities [Classic]

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 rescheduled bookings, and cancellations. You can also perform actions such as cancelling a booking 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.

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.

The Details pane of each activity allows you to access additional information about the activity. 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.

The Free text filter

The Free text filter allows you to find activities by typing in any information included in the activity details. For example, you could search by a Customer's name, a Customer's email address, or an Activity ID.

Advanced filter options

Advanced filter options allow you to filter according to specific parameters. The list of parameters appears when you click the drop-down arrow next to the Free text filter box.

Custom filters

Custom filters allow you to create and save a selection of filters for quick and convenient access.

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.

Booking pages with and without Event types

Booking pages with and without Event types

If you are using Booking Pages [Legacy]

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 are using Booking Pages [Legacy]

And 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.
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.**
3. The **Reassign the booking** pop-up will appear.
4. Select the Booking link 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.**
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.

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**.

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. 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**. You can also access additional filter options by selecting **Bookings**, **Session packages**, or **Transactions**.

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. For example, you could filter by using the name of a Booking 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.

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.
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 link 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 links 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 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.

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 guest 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**.
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.

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**.
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.

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**. You can also access additional filter options by selecting **Bookings**, **Session packages**, or **Transactions**. 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.

Tip:

You can share filters between members of your organization.

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. To share this filtered view, copy the page URL and send it to another team member via email.

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.

The Activity stream: Managing activities [Classic]

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).

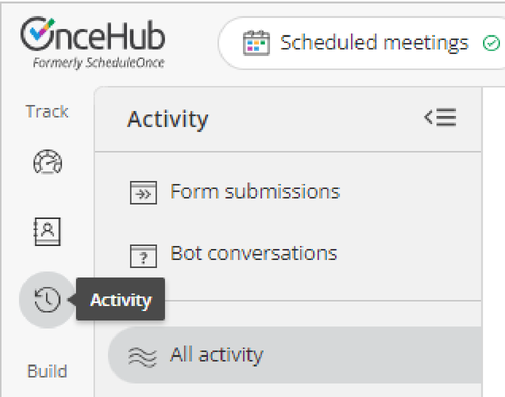


Figure 1: The activity stream icon

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).

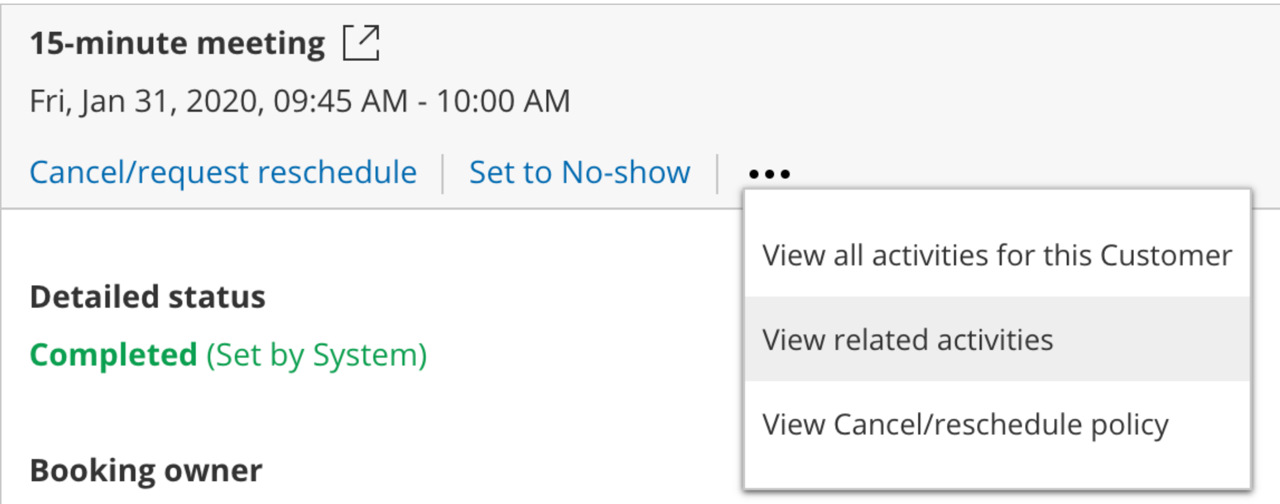


Figure 1: View related activities

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.

If you are using Booking Pages [Legacy]

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.

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 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.	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 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

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.

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).

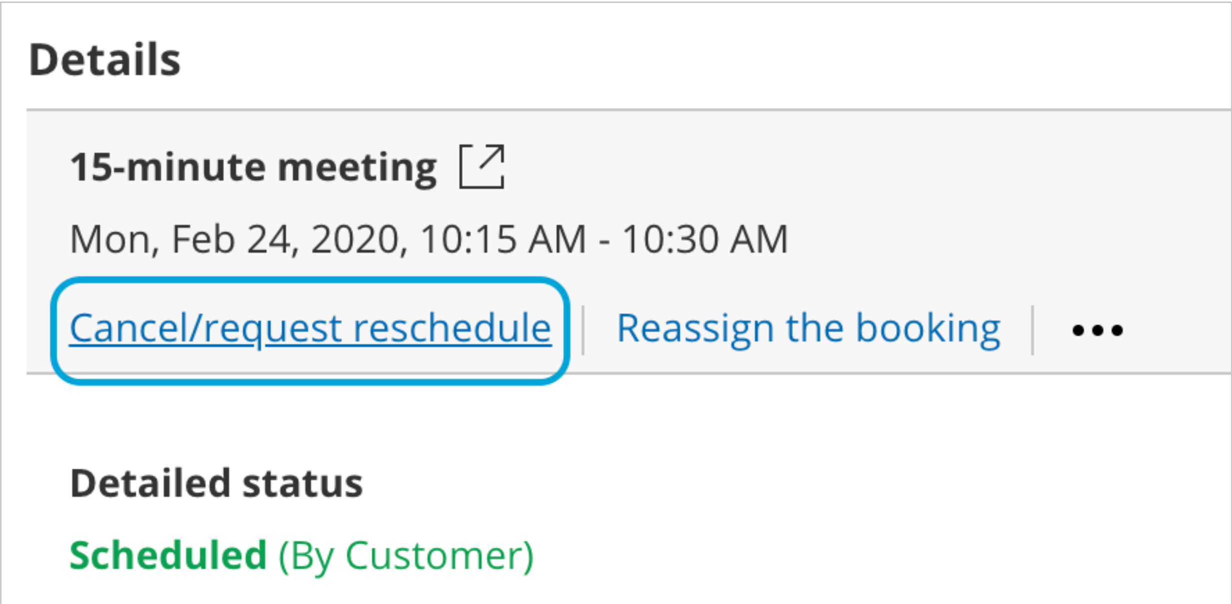


Figure 3: Cancel/request new times button

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.

Payment transaction types and statuses

If you are using Booking Pages [Legacy]

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.

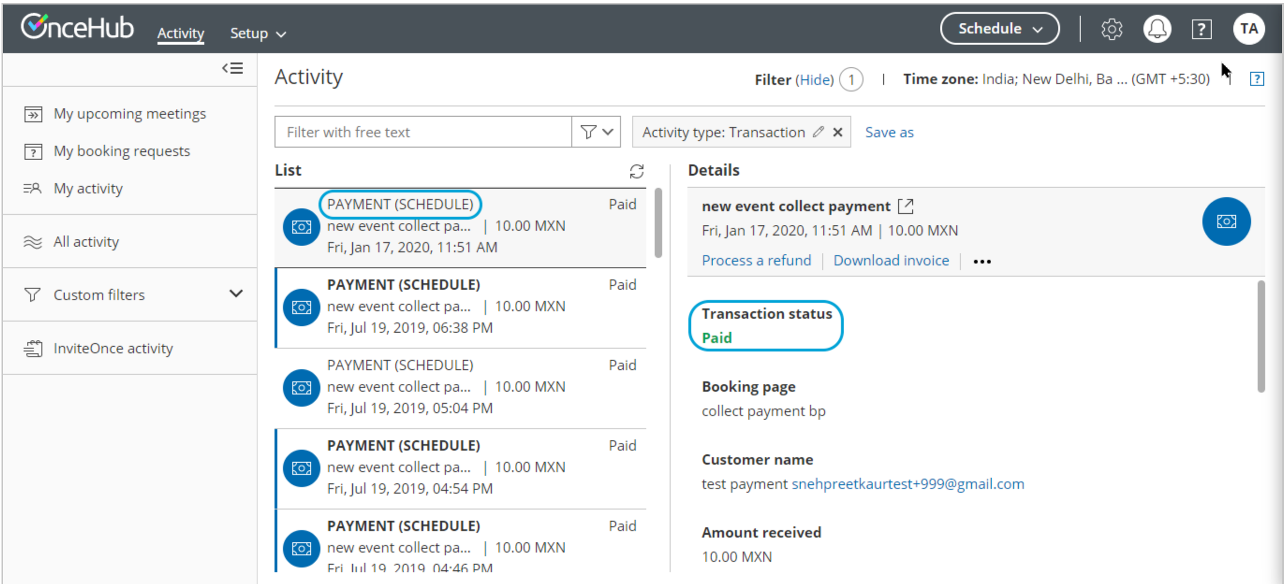


Figure 1: Transactions in the Activity stream

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.

They 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).

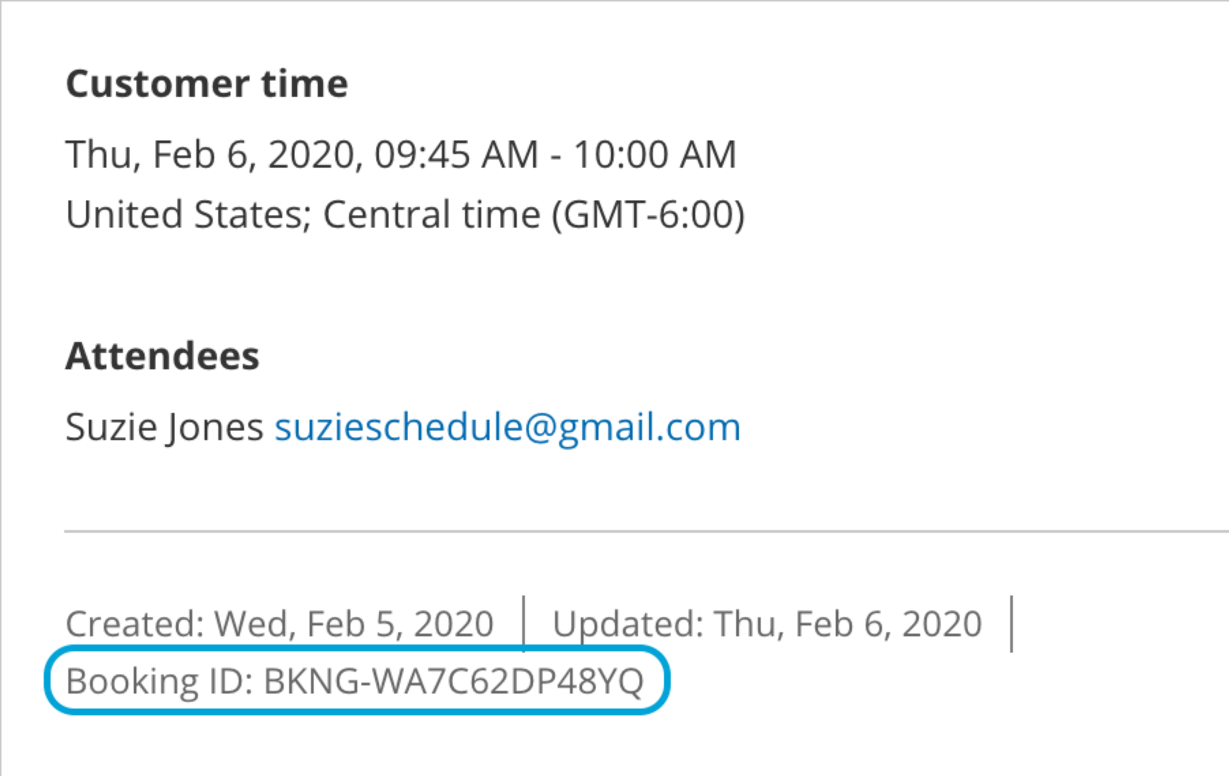


Figure 1: Activity ID

4. To search for a specific activity, enter the Activity ID in the Free text filter above the Activity stream (Figure 2).

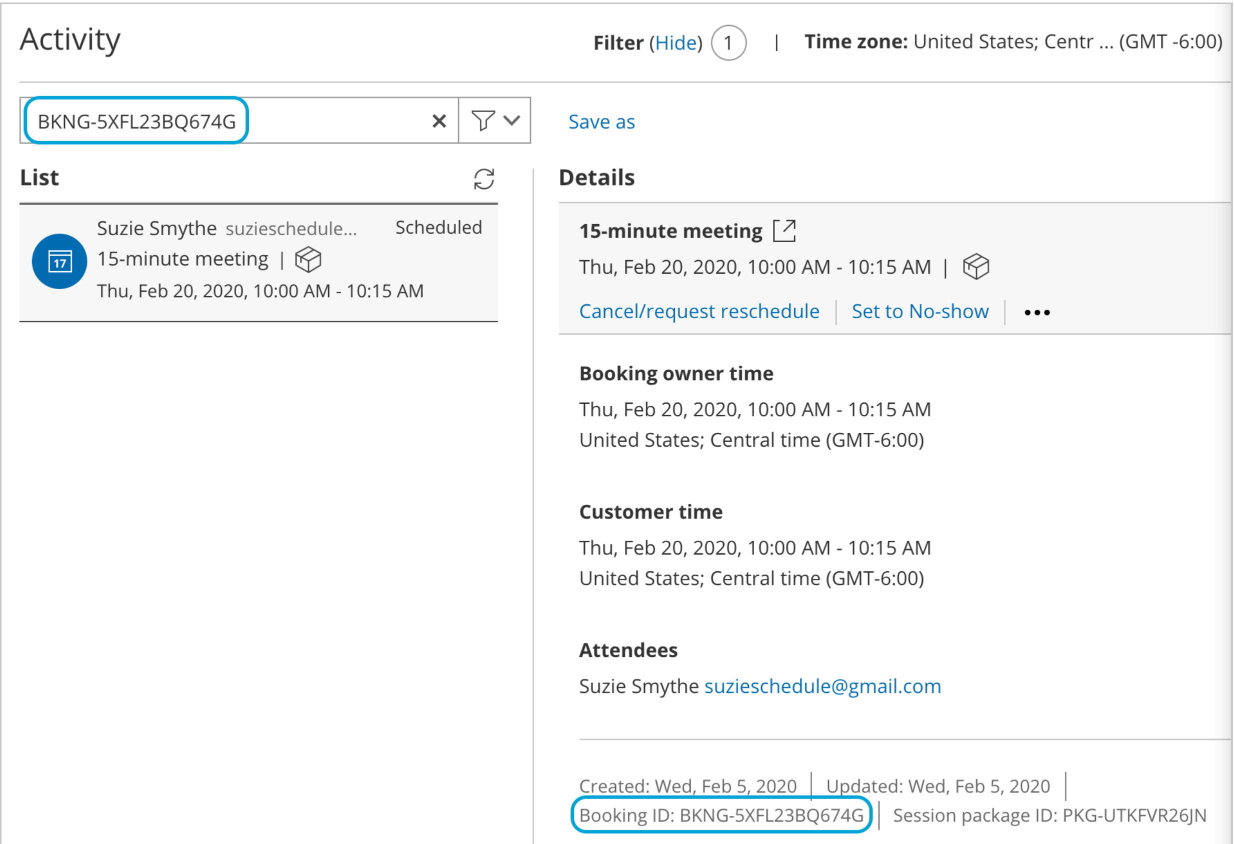


Figure 2: Free text filter with an Activity ID

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 are using Booking Pages [Legacy]

Booking page users also have two additional Activity IDs:

- Session package ID
- Transaction ID

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).

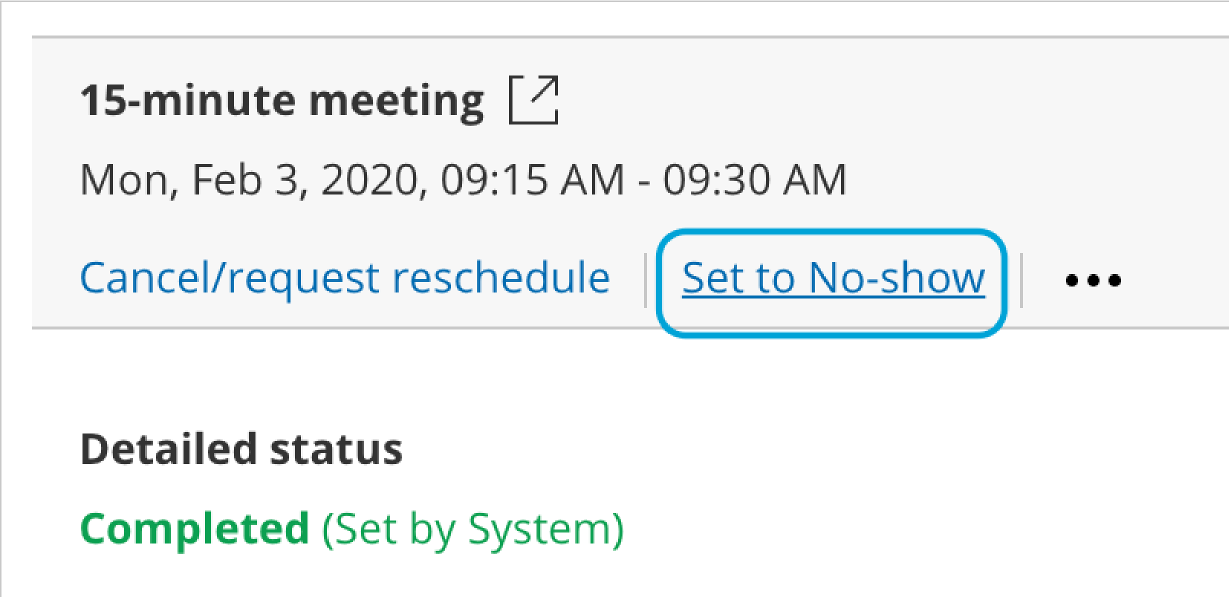


Figure 1: Set to No-show

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.

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.

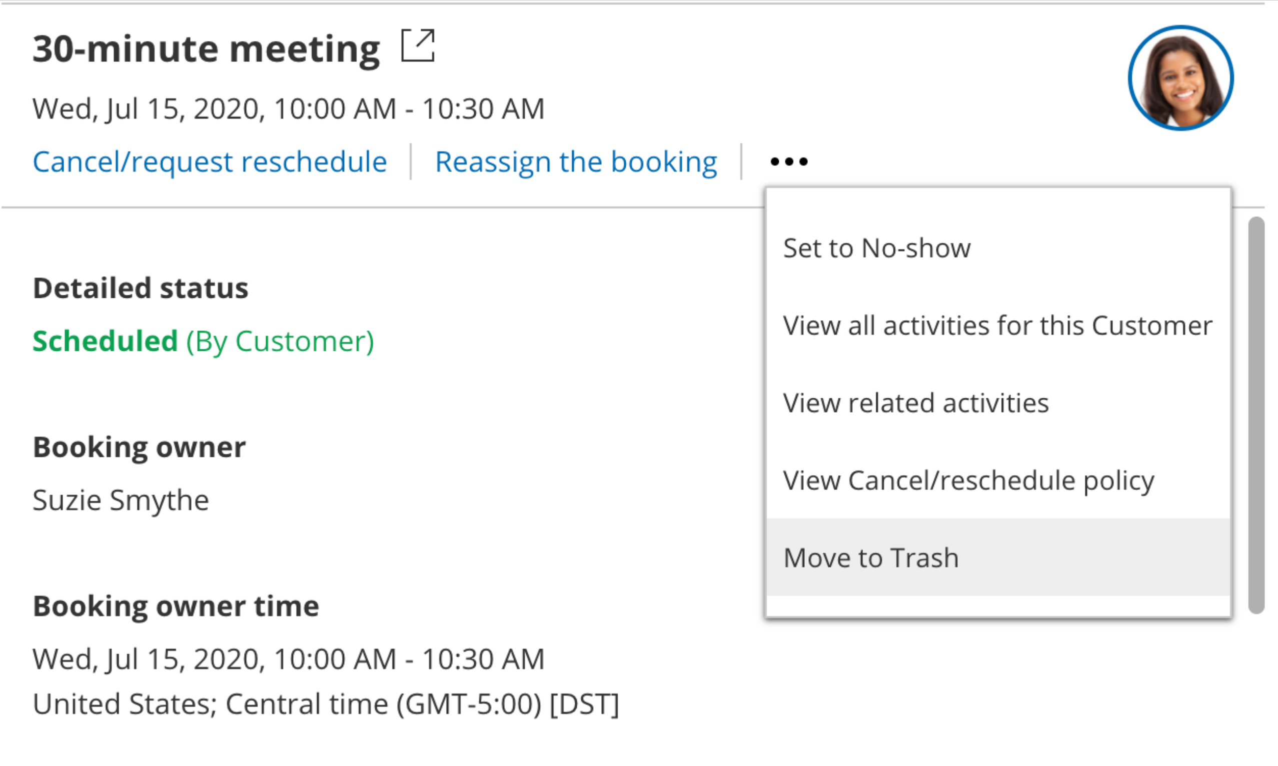


Figure 1: Move to Trash

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.

Users **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.

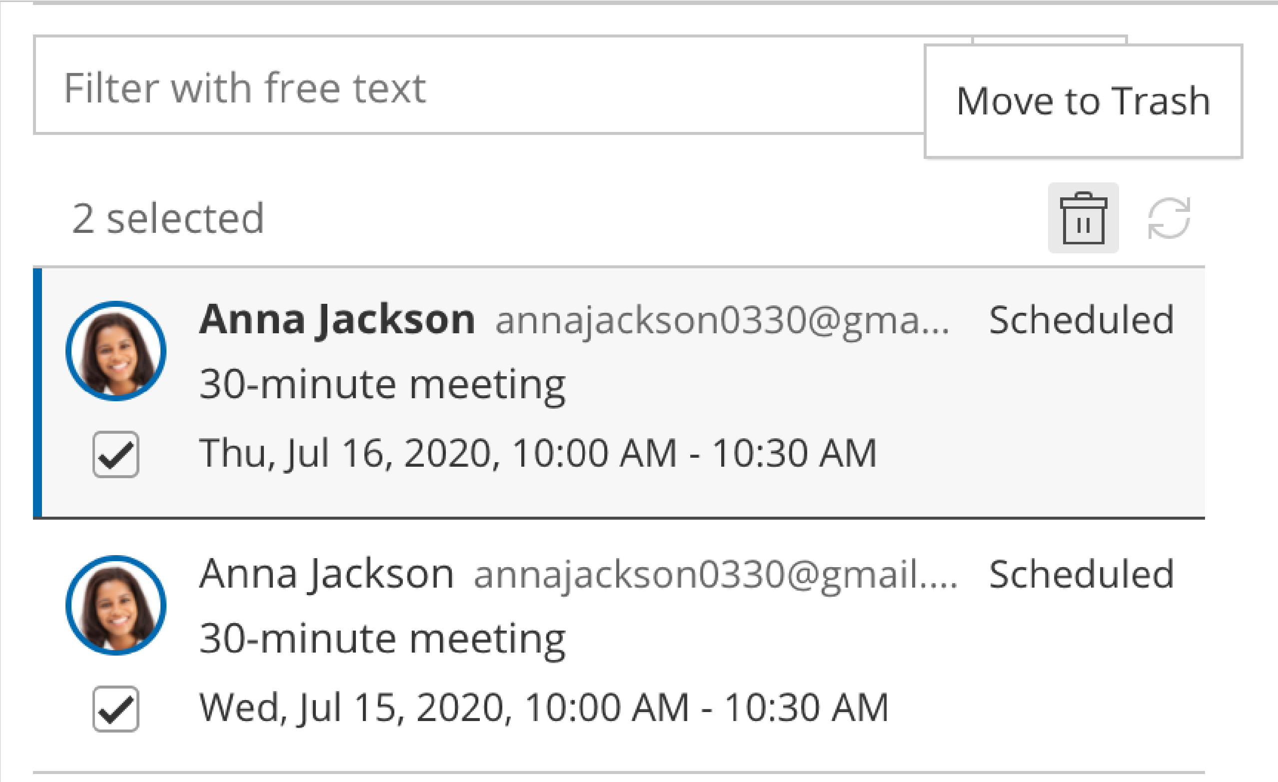


Figure 2: Select multiple activities for moving to trash

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.

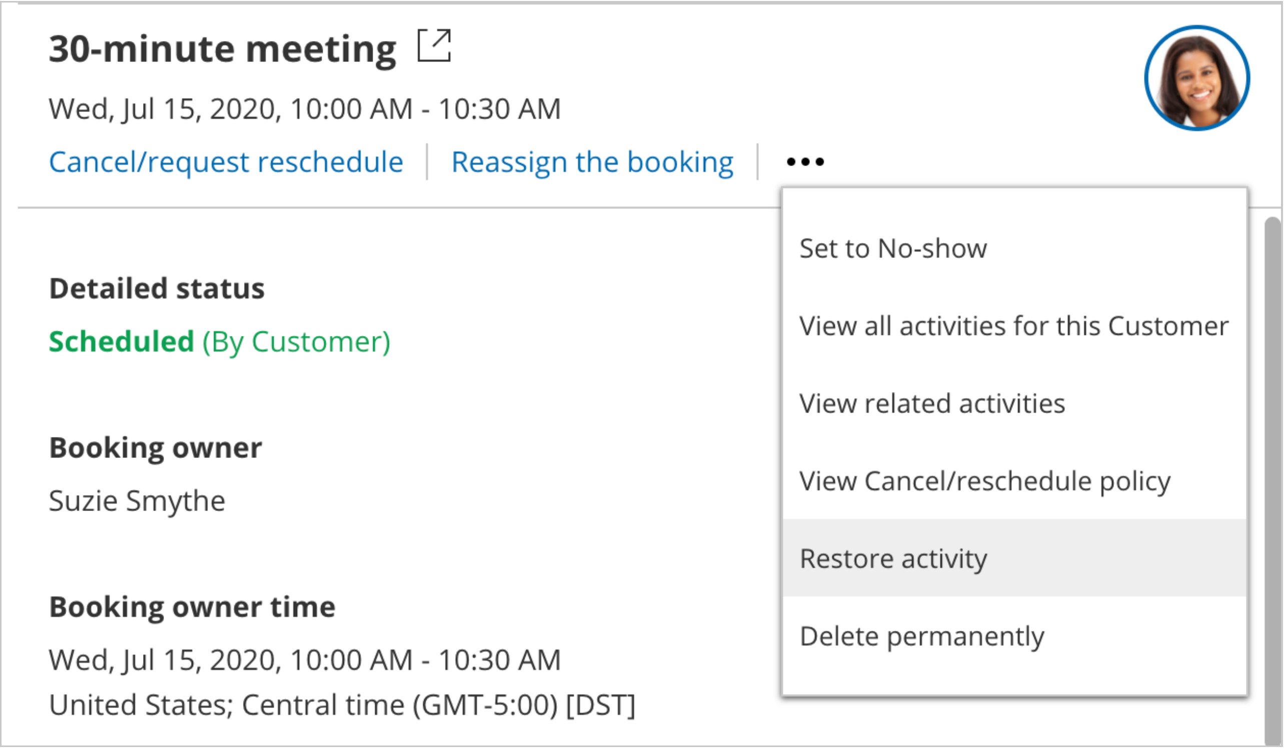


Figure 3: Restore activity

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.

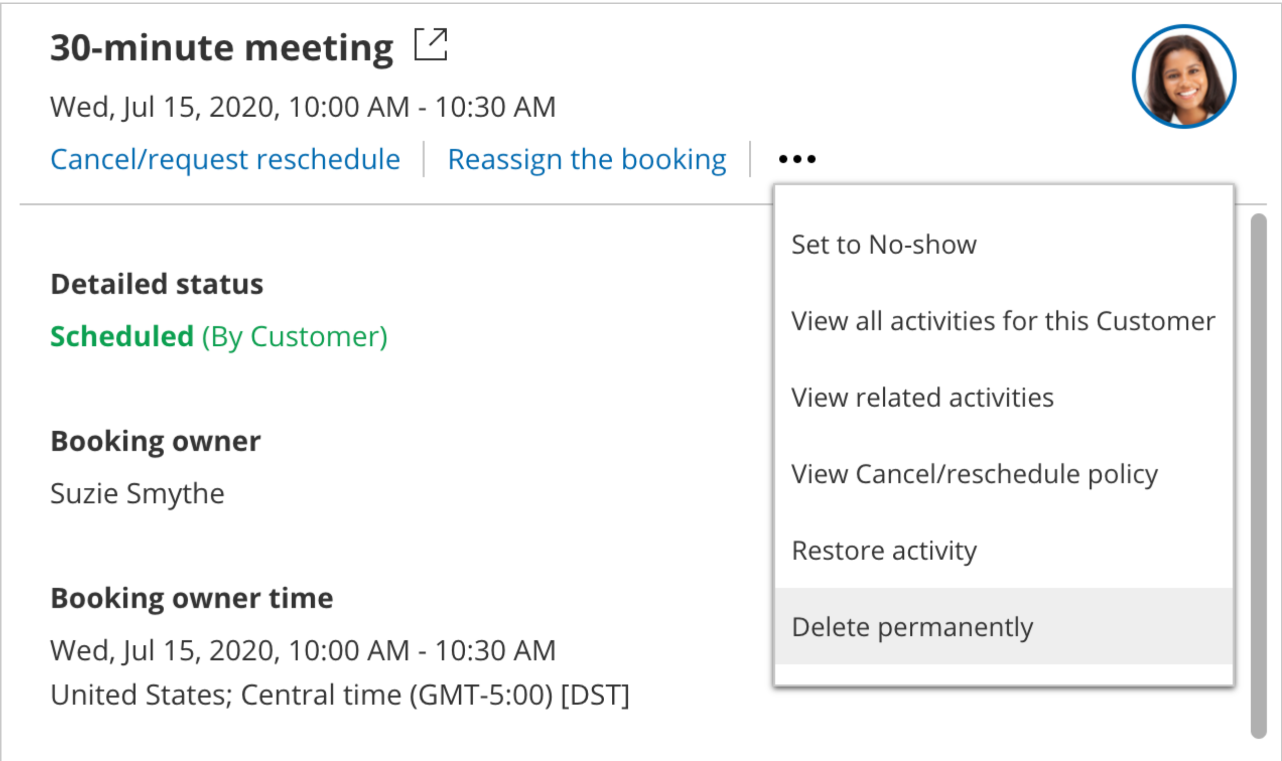


Figure 4: Delete permanently

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.

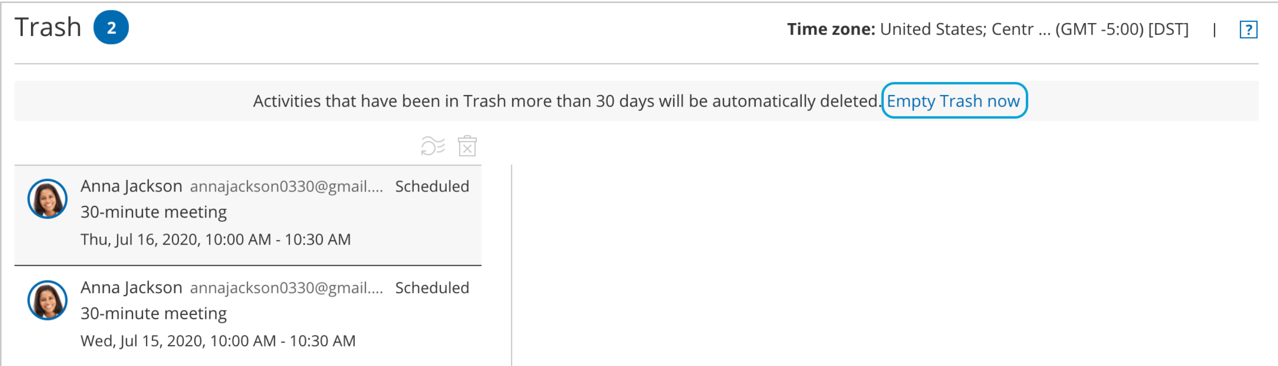


Figure 5: Empty trash now to remove all items in the Trash

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

If you are using Booking Pages [Legacy]

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

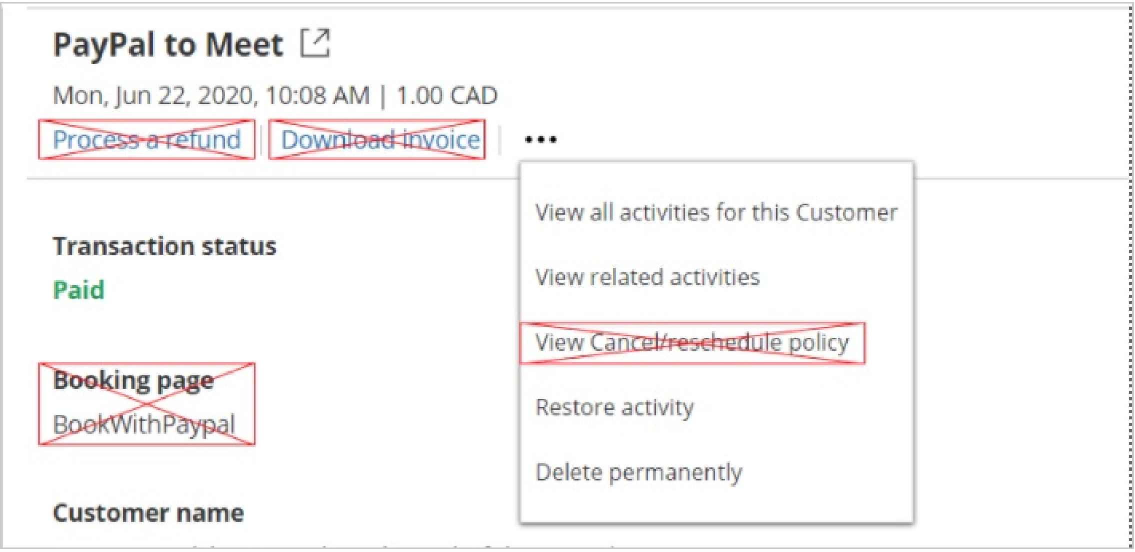


Figure 7: Removed fields with deleted payment activity

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 Analytics and Source tracking [Classic]

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 UTM tracking [Classic]

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).

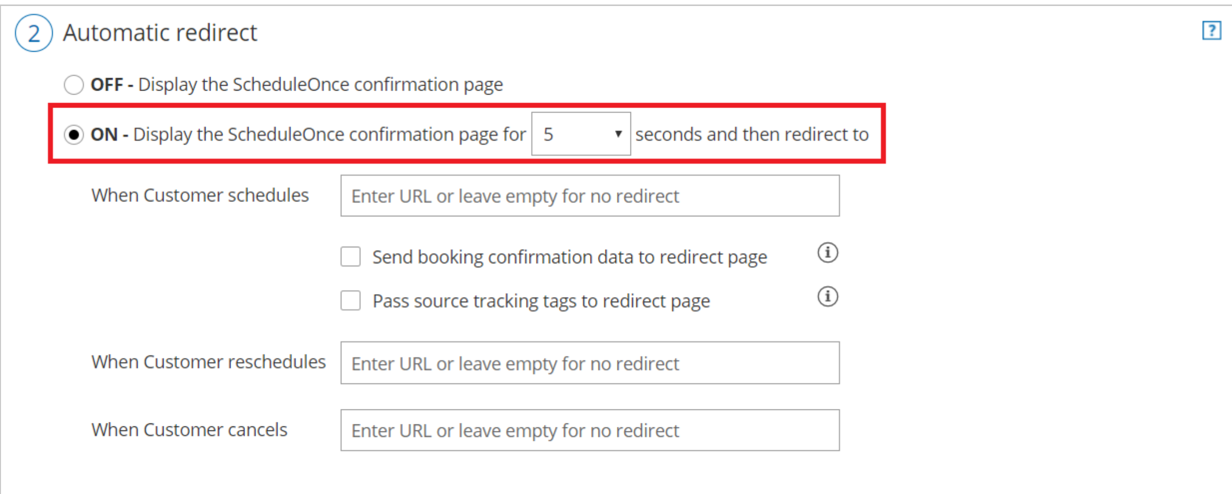


Figure 1: Booking form and redirect section

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.

Introduction to reports [Classic]

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).

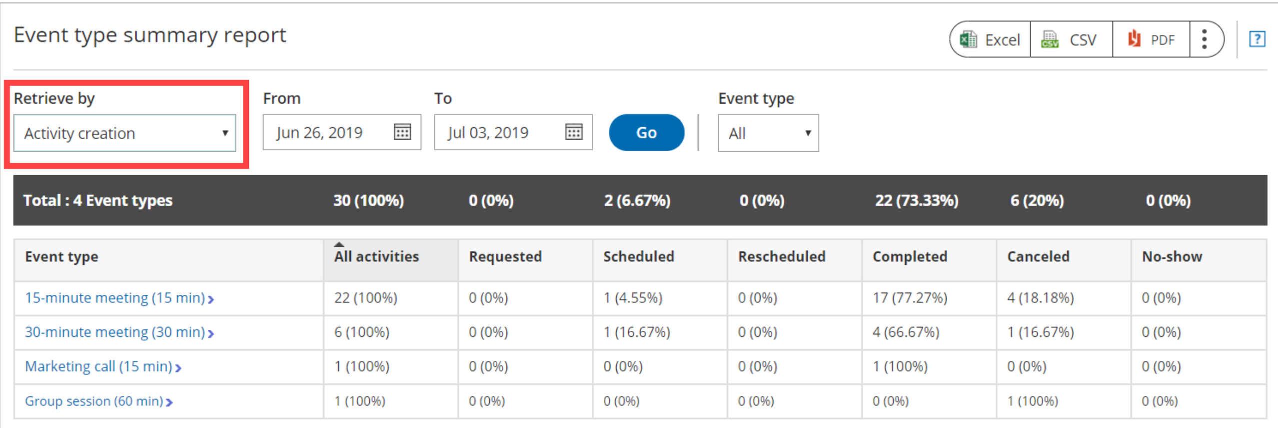


Figure 1: Retrieve by drop-down menu

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 [Classic]

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).

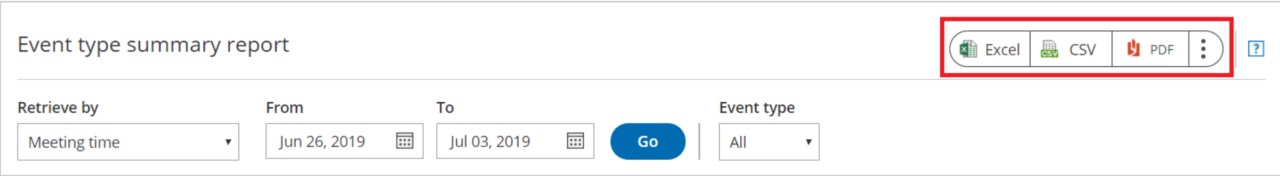


Figure 1: Export report buttons

Booking page reports [Classic]

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).

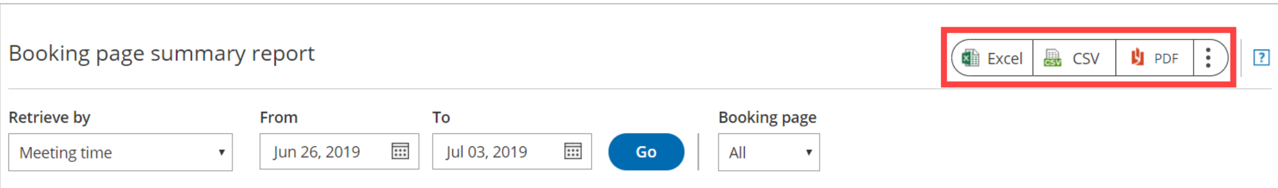


Figure 1: Export report buttons

Master page reports [Classic]

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 [Classic]

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

Using booking pages with web analytics [Classic]

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).

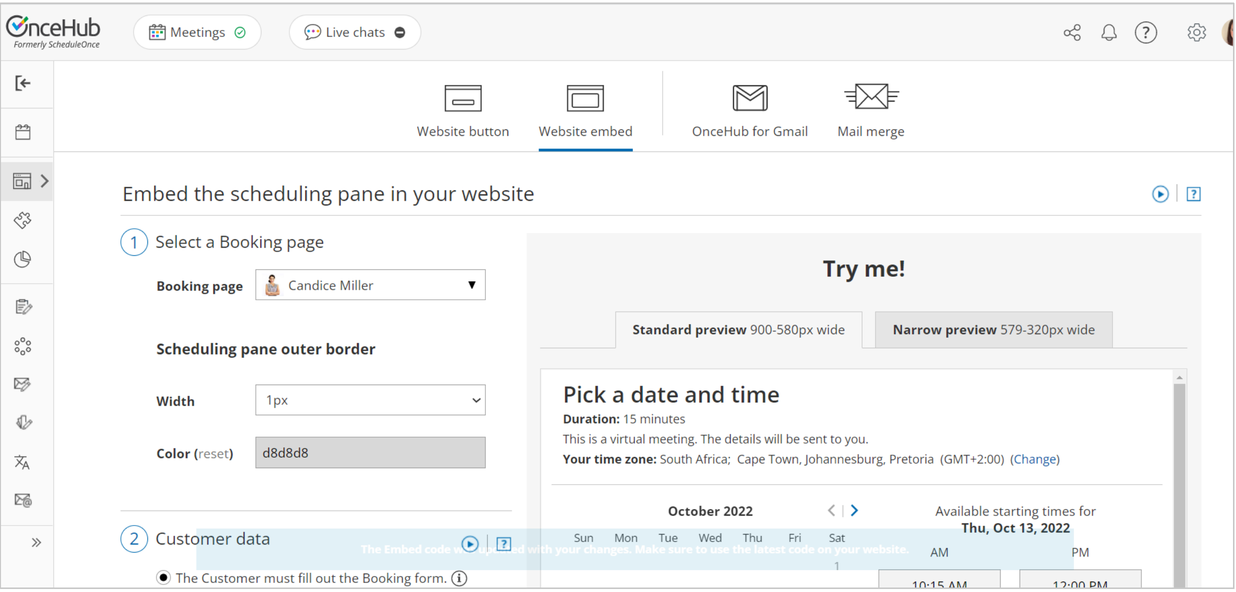


Figure 1: Website button tab

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.

User reports [Classic]

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).

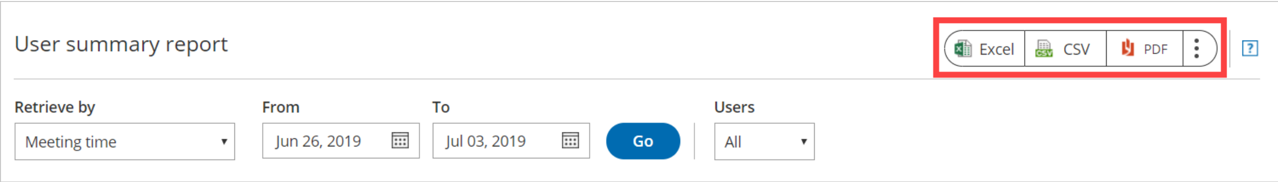


Figure 1: Export report buttons

Account reports [Classic]

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 [Classic]

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.

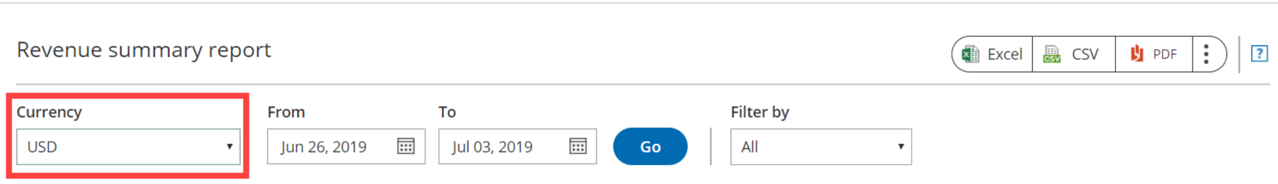


Figure 1: Currency drop-down menu

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).

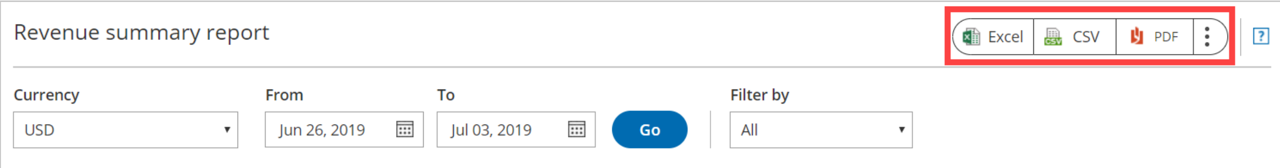


Figure 1: Export report buttons

Report header [Classic]

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).

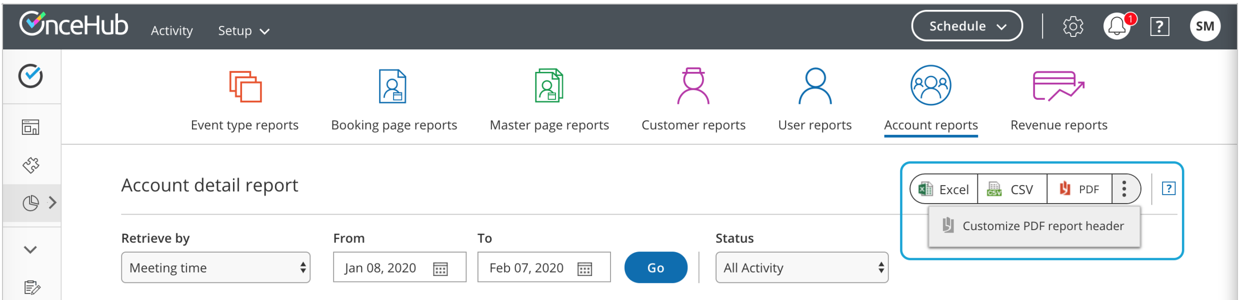


Figure 1: Customize PDF report header option

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 [Classic]

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.

Viewing collected information from your Booking form [Classic]

OnceHub allows you to use System fields and Custom fields to create Booking forms customized for your needs. The data you collect can be used to learn more about your Customers and enhance their overall scheduling experience.

The information collected from Booking forms is available in reports, the Activity stream, calendar events, and in Dynamic fields which can be used in Custom email and SMS templates.

Reports

Detail reports can be customized with the exact data that you collected from your Booking forms. For example, if your Booking form includes a Custom field where the Customer fills out their location, you can analyze your geographic reach with a Customer report that includes the location information.

All reports can be exported as Excel, CSV, or PDF files. This allows you to further analyze the data and share professional reports with your stakeholders.

For example, you can export a list of your scheduled Customers with their emails and phone numbers. Alternatively, if you're running an event, you can provide attendees with a branded PDF report that includes their meetings for the day and all of the relevant details they filled out at the time of booking.

The Activity stream

The Activity stream is where you have access to all of the activities in your OnceHub account. When you select an activity, you can see information collected from the Booking form in the **Details** pane on the right-hand side (Figure 1). The bottom section displays the information collected via the Custom fields.

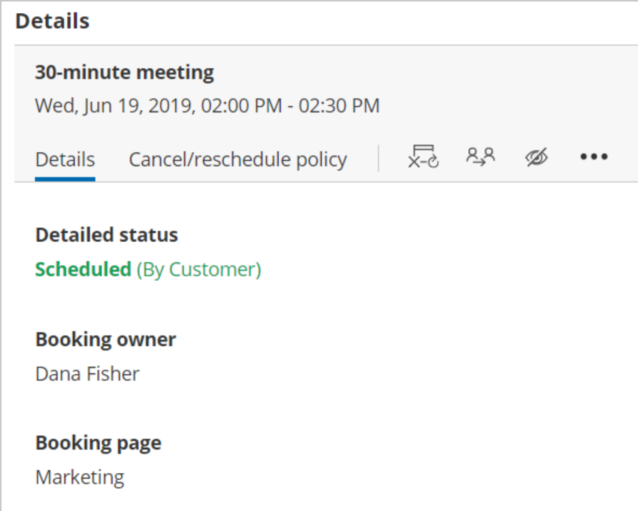


Figure 1: Details pane

Notifications by email and SMS

User notification emails, Customer notification emails, and SMS notifications are automated messages sent by the system when scheduling events are triggered. These events can be booking requests, scheduled bookings, reminders, rescheduled bookings, requests to schedule a new time, and cancellations.

The templates include the scheduling details, calendar invitation and information gathered via the Booking form.

Learn more about email and SMS templates

Introduction to single-user scenarios [Classic]

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

Using Booking pages for multiple meeting types [Classic]

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.

Offering different appointment types on your Booking page [Classic]

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).

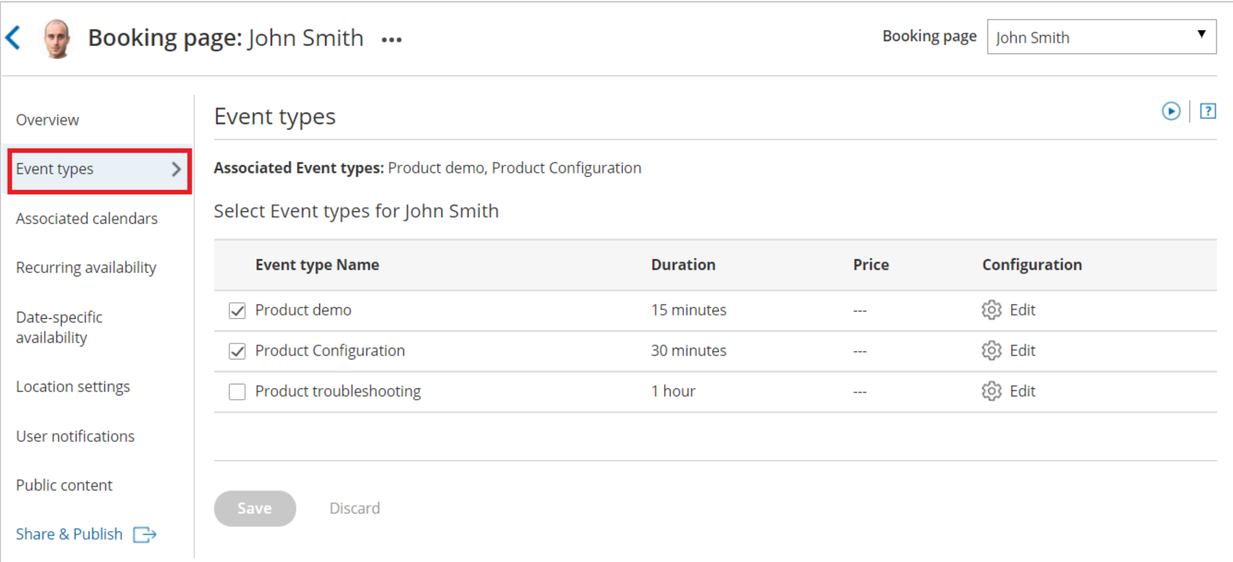


Figure 1: Event types section of the Booking page

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

Accepting appointments for yourself using Event types [Classic]

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.

Accepting appointments for yourself without Event types [Classic]

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 [Classic]

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

Supporting different locations or times [Classic]

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.

Configuring your booking page for scheduling meetings for a business trip [Classic]

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

Introduction to multi-user scenarios [Classic]

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.

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 [Classic]

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).

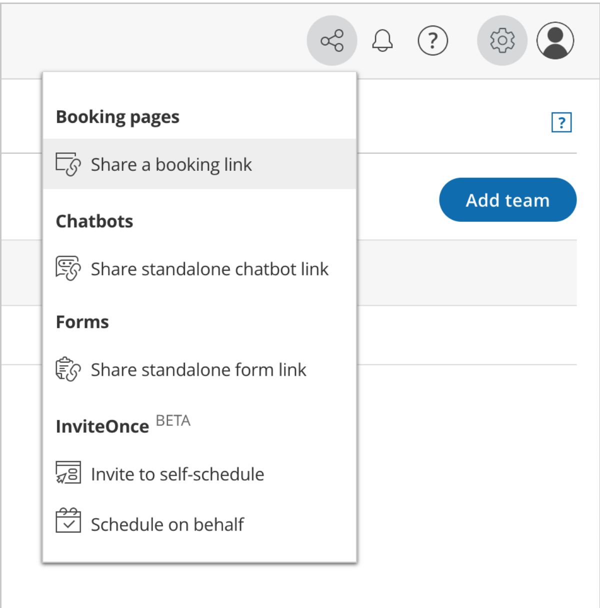


Figure 1: Quick share icon

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

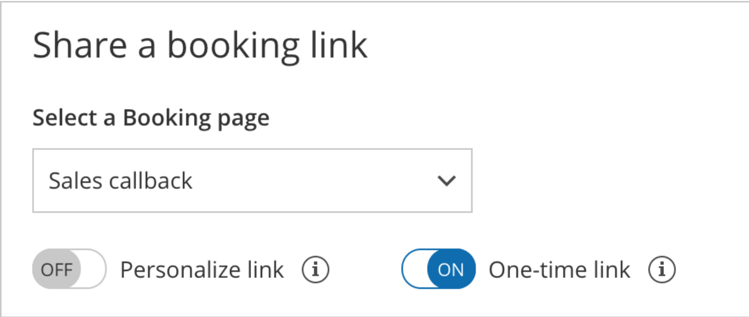


Figure 2: One-time link toggle ON/OFF

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).

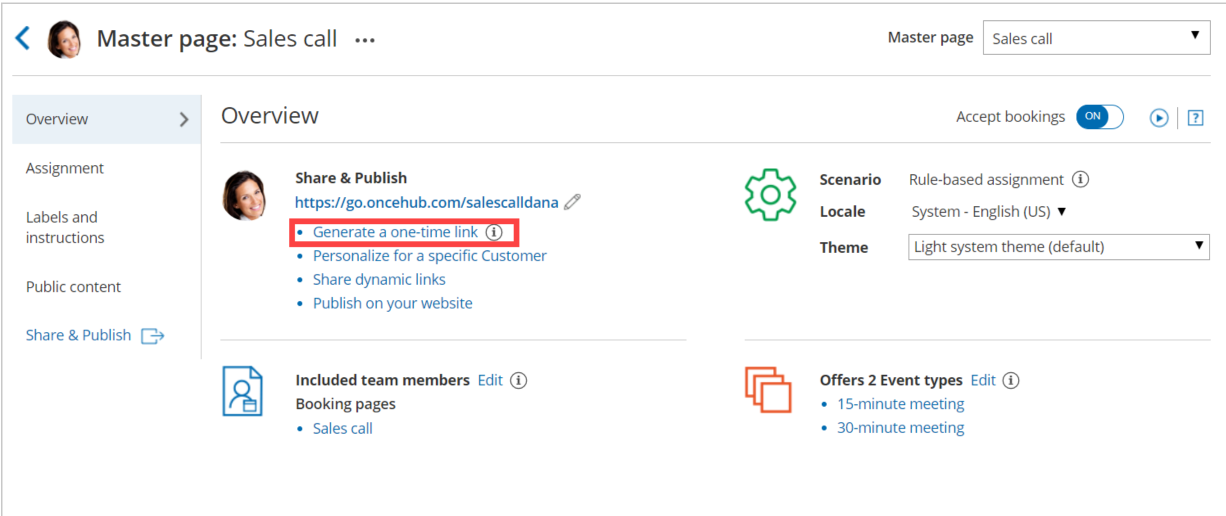


Figure 3: Generating a one-time link in the Master page Share & Publish section

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

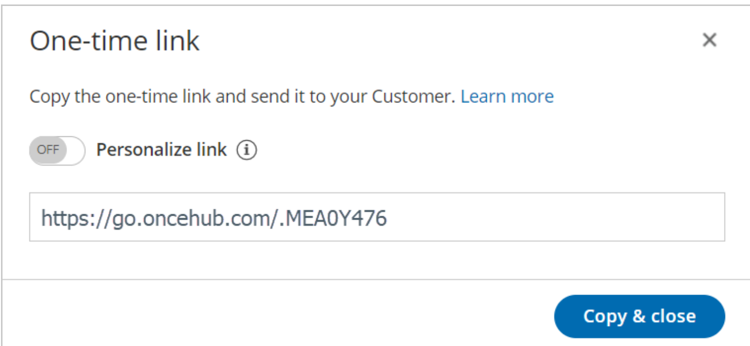


Figure 4: One-time link pop-up

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).

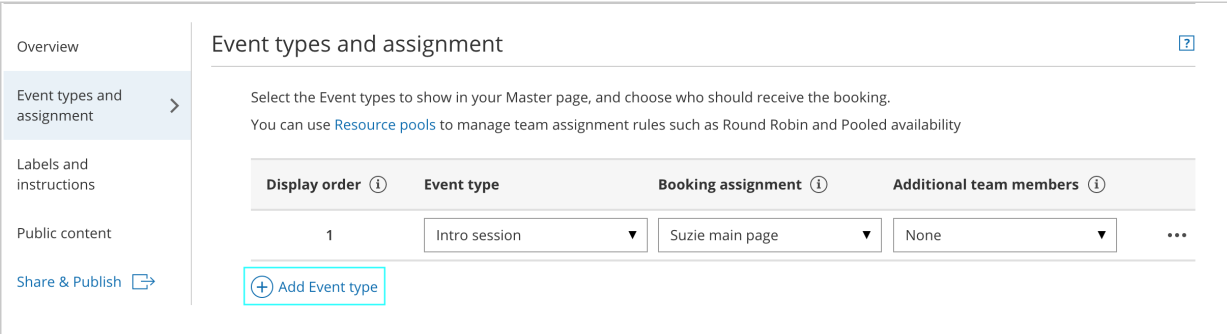


Figure 5: Add Event type

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.

Room and resource scheduling with team or panel pages [Classic]

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:

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).

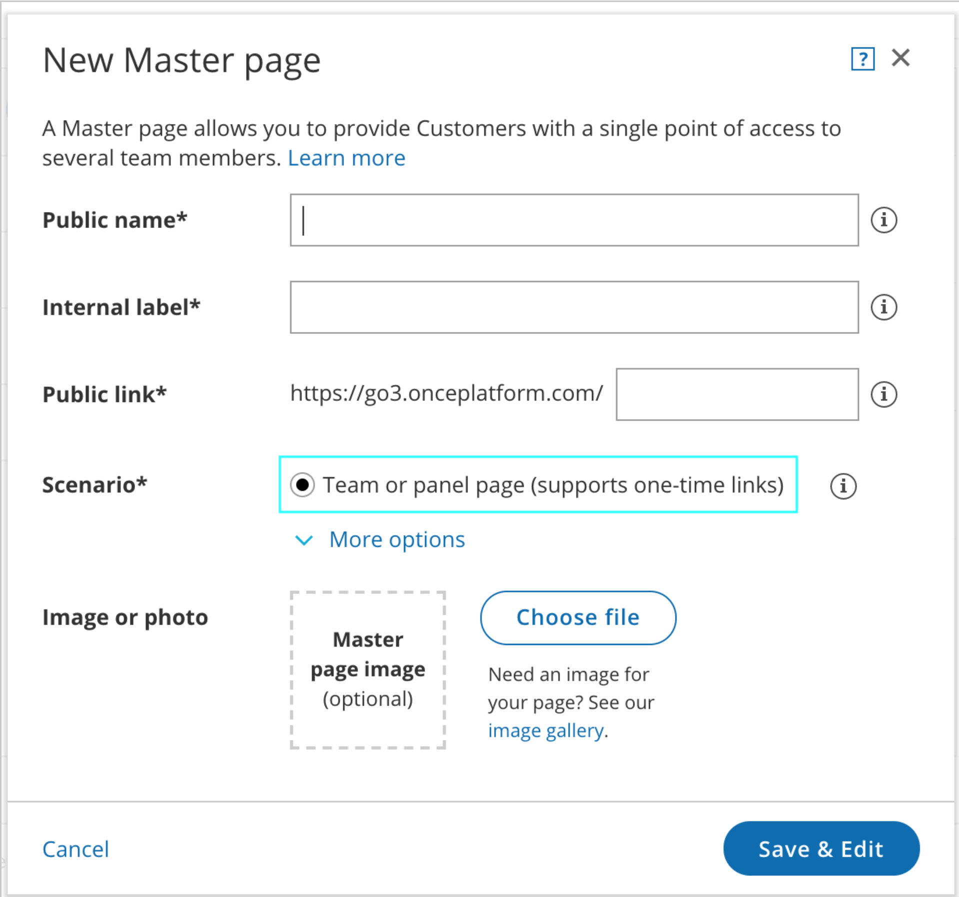


Figure 1: New Master page pop-up

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.

Room and resource scheduling without rule-based assignment [Classic]

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.

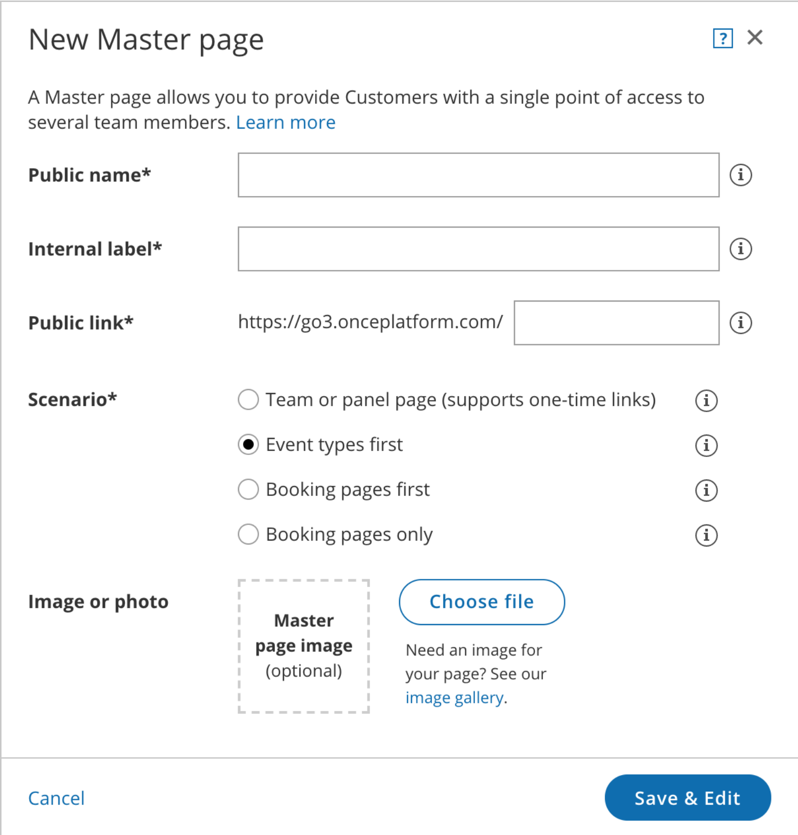


Figure 1: New Master page popup

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.

Booking conditional on the availability of a single resource [Classic]

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 [Classic]

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

Team Scheduling with Event Types: With Team or Panel Pages [Classic]

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).

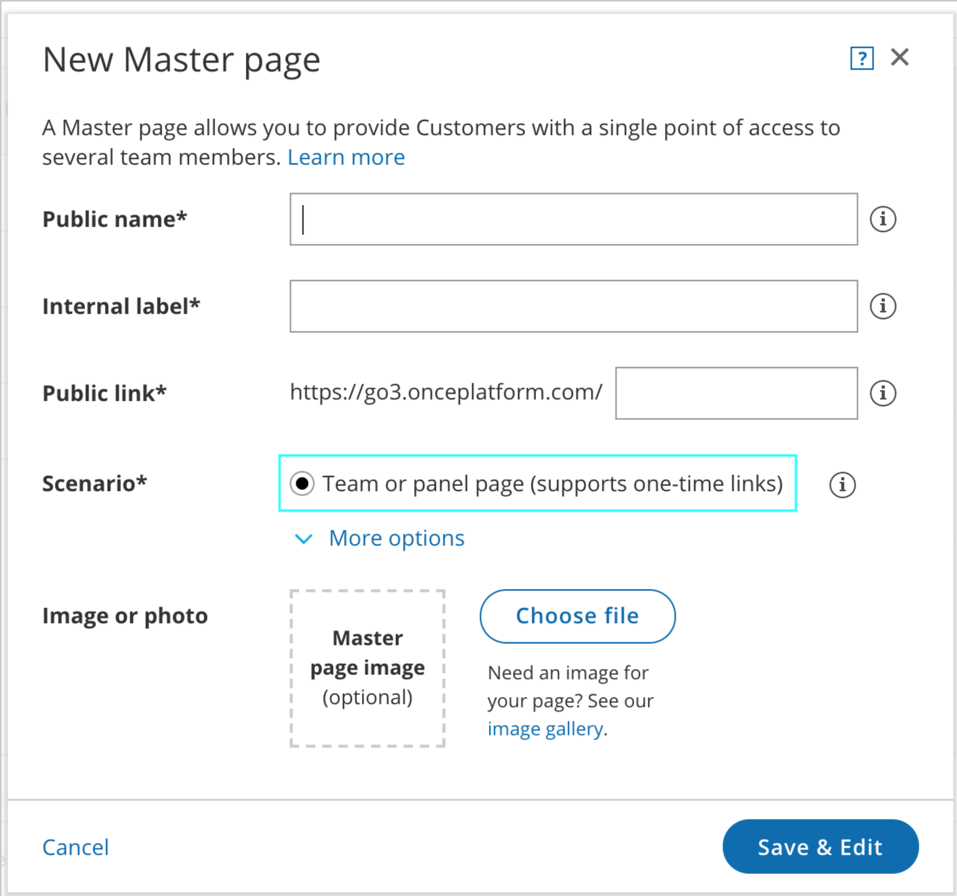


Figure 1: New Master page pop-up

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

Team Scheduling with Event Types: Without Team or Panel Pages [Classic]

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.

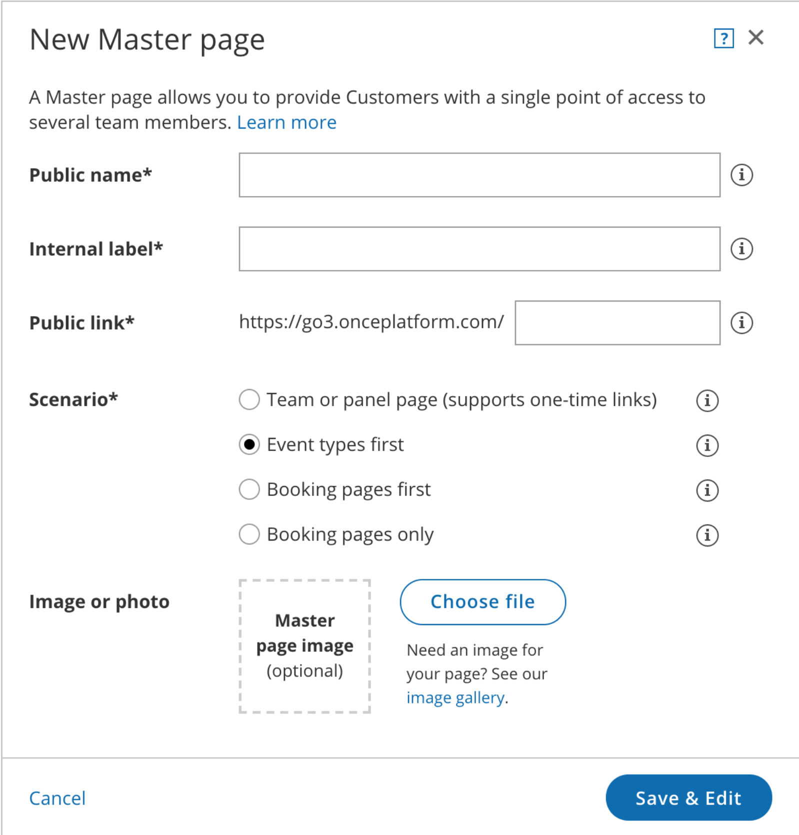


Figure 1: New Master page popup

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.

Team Scheduling without Event Types [Classic]

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.

Configuring your booking page for scheduling conferences, trade shows and other events [Classic]

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.

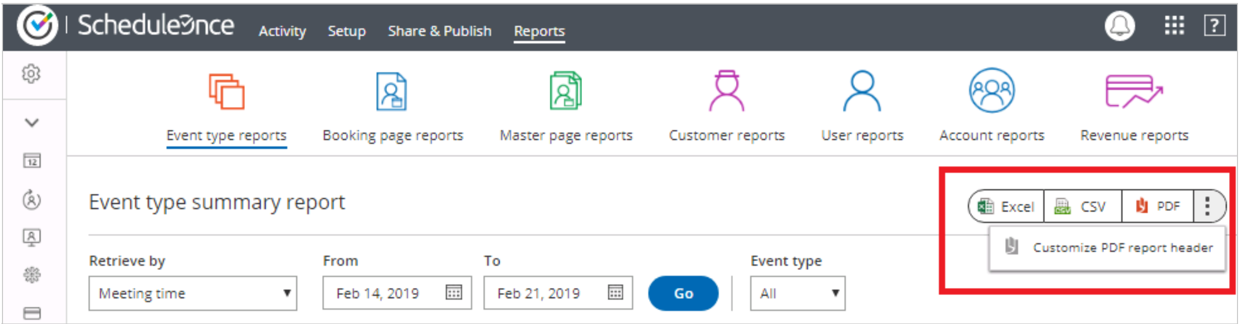


Figure 1: Reports page

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**.

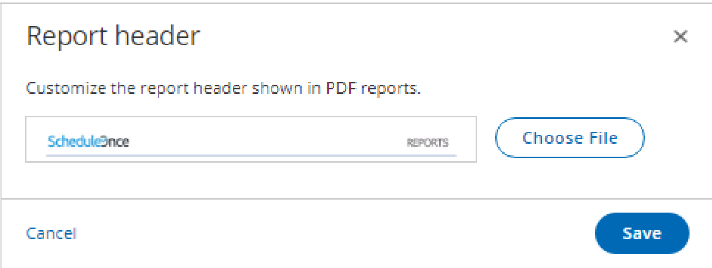


Figure 2: Report header pop-up

Note:

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

Introduction to multiple attendee scenarios [Classic]

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 with a connected calendar [Classic]

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 group sessions without a connected calendar [Classic]

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.

Using OnceHub to accept bookings for classes [Classic]

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 [Classic]

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.

Can Customers invite Guests to a booking? [Classic]

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 OnceHub for Gmail [Classic]

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.

Uninstalling OnceHub for Gmail

Read our instructions for uninstalling the OnceHub for Gmail Extension article.

Installing OnceHub for Gmail [Classic]

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).

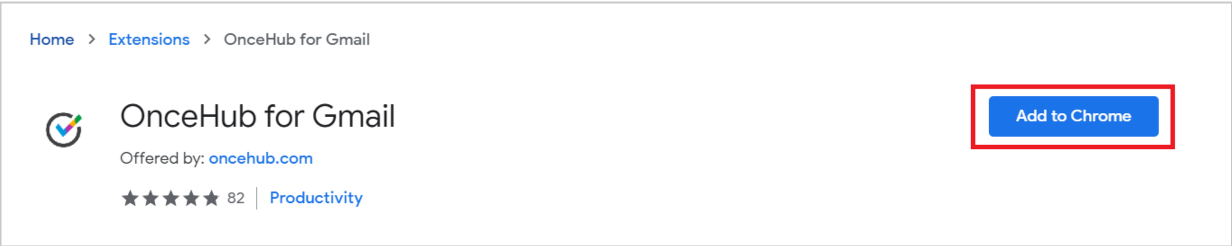


Figure 1: Add to Chrome

3. The installation permissions pop-up will appear.
4. Click **Add Extension** (Figure 2).

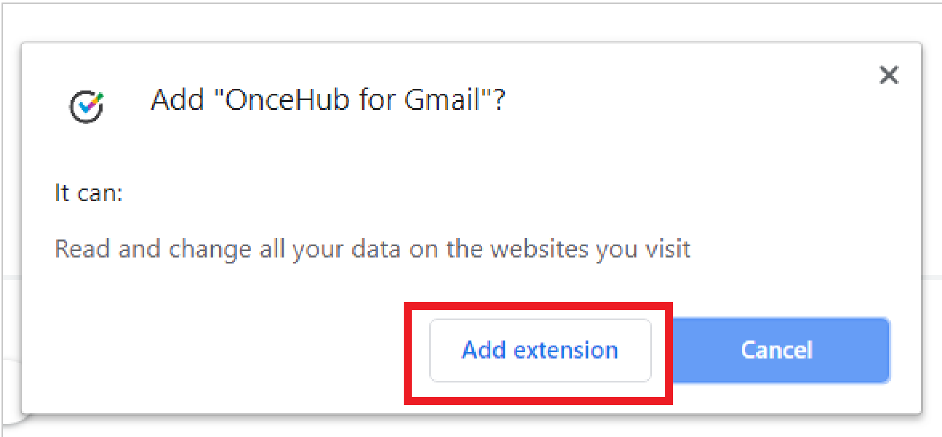


Figure 2: Add Extension

5. Once installed, you will see the OnceHub for Gmail confirmation screen. **(Figure 3)**

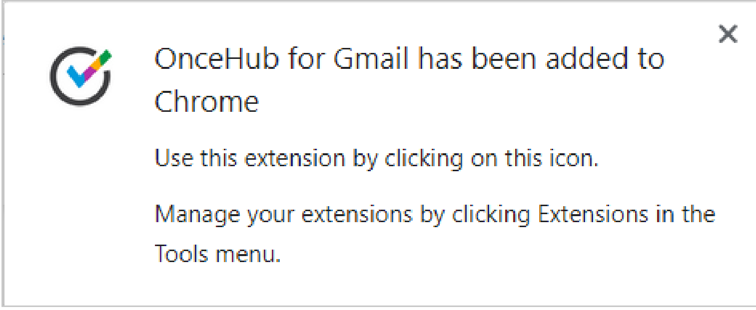


Figure 3: Confirmation

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.

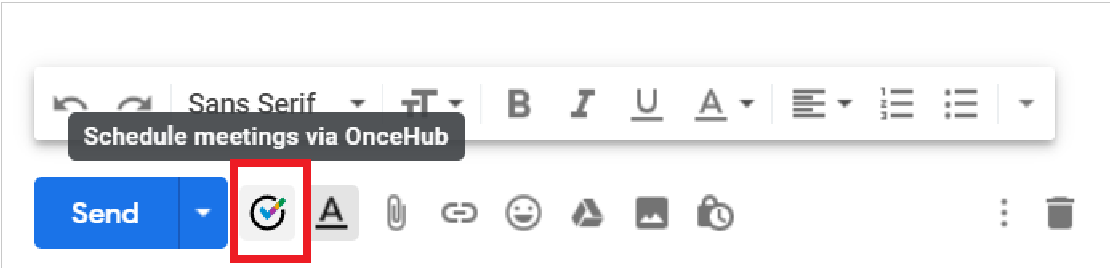


Figure 4: OnceHub for Gmail icon in your email

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

Uninstalling OnceHub for Gmail [Classic]

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).

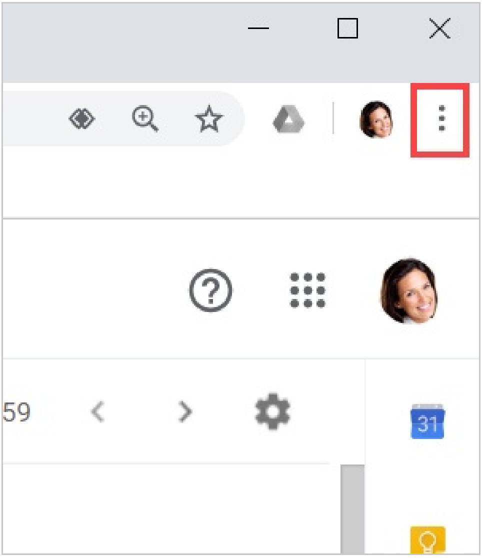


Figure 1: Chrome browser three dots (action menu)

2. In the drop-down menu, select **More tools -> Extensions**.
3. In the **OnceHub for Gmail** box, click **Remove** (Figure 2).

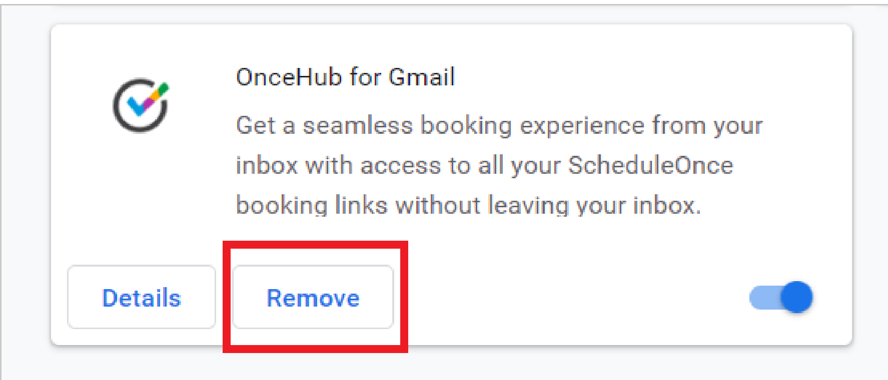


Figure 2: OnceHub for Gmail options in extensions menu.

4. Once you click **Remove**, you will see a confirmation screen (Figure 3). Click **Remove.**

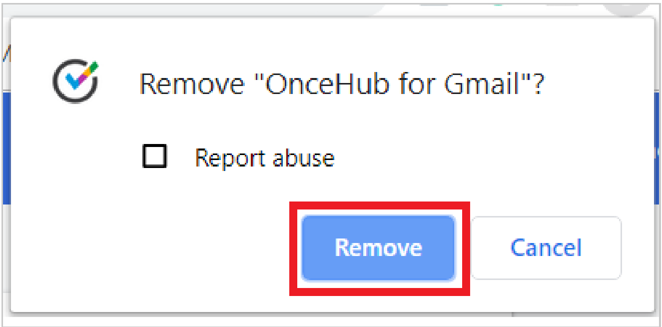


Figure 3: Removal confirmation.

From Chrome Web Store

1. Go to the Chrome Web Store listing for OnceHub for Gmail.
2. Click **Remove from Chrome** (Figure 4).

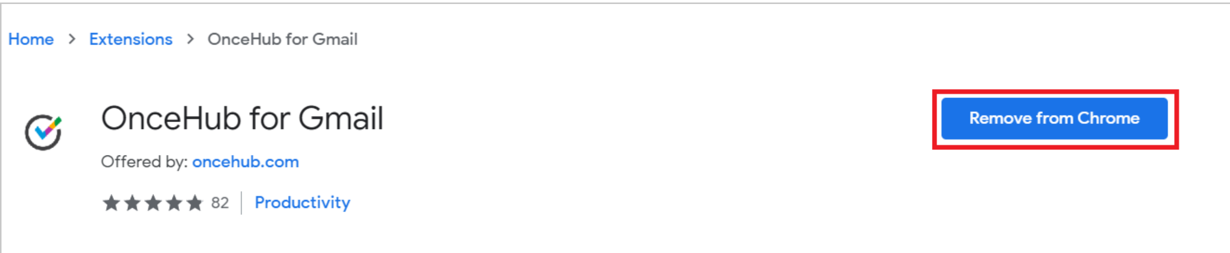


Figure 4: Removing OnceHub for Chrome in Chrome Web Store.

Sending Personalized links using OnceHub for Gmail [Classic]

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.

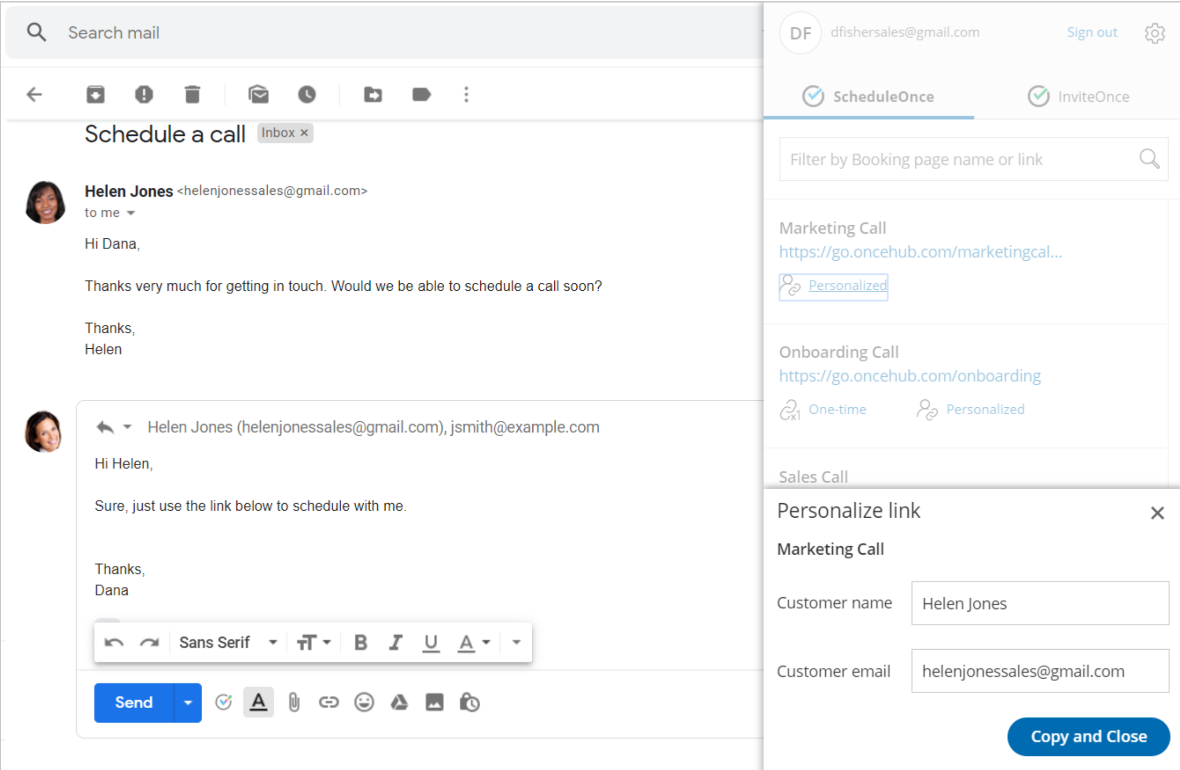


Figure 1: Confirming the details of a Personalized link

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).

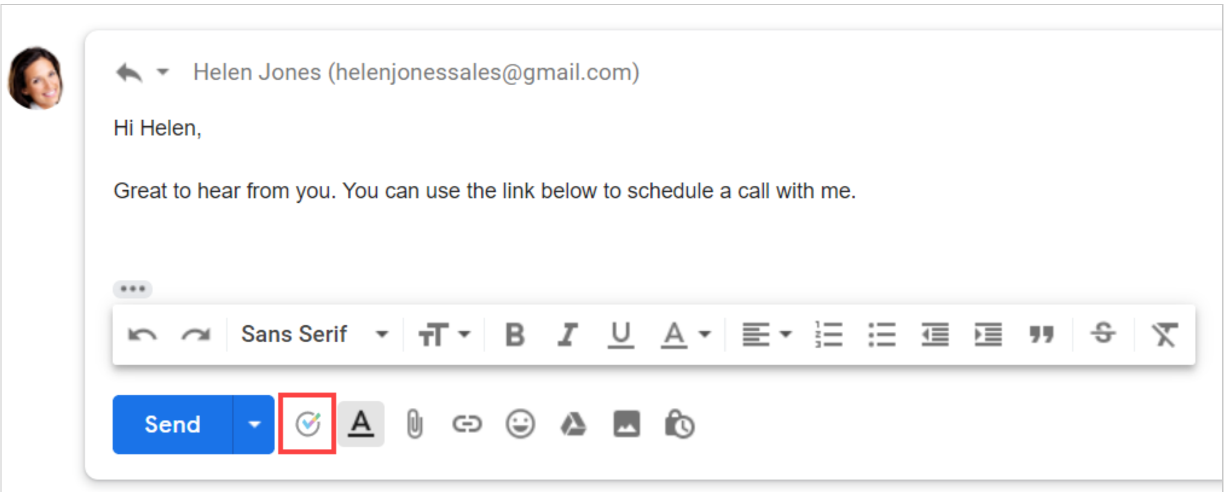


Figure 2: OnceHub for Gmail icon

5. The OnceHub for Gmail extension window will open (Figure 3).

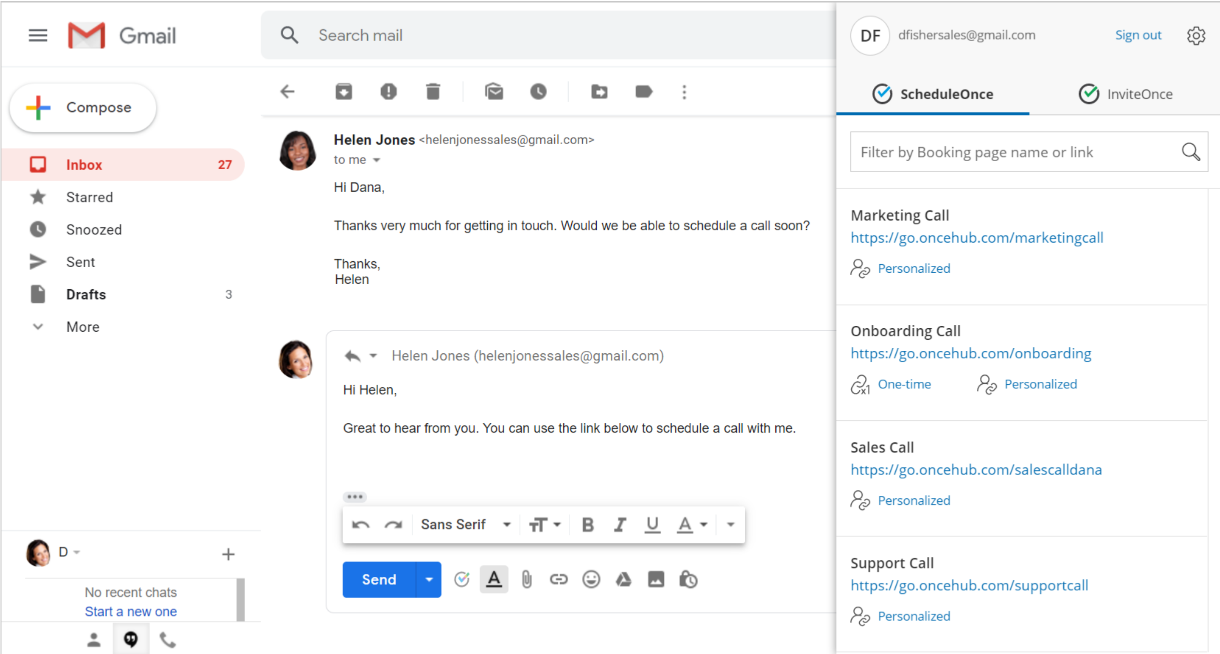


Figure 3: OnceHub for Gmail extension window

6. Click **Personalized** next to the Booking page you want to share (Figure 4).

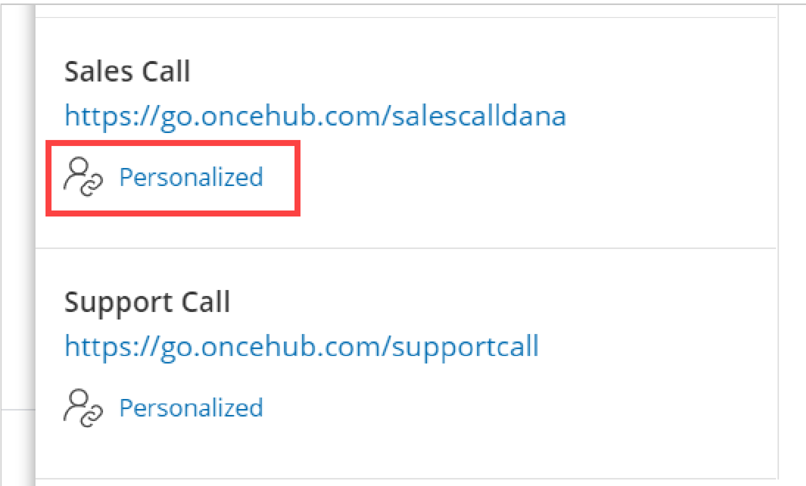


Figure 4: Generating a Personalized link

7. You will see the **Copied** confirmation when the link has been generated and copied to your clipboard (Figure 5).

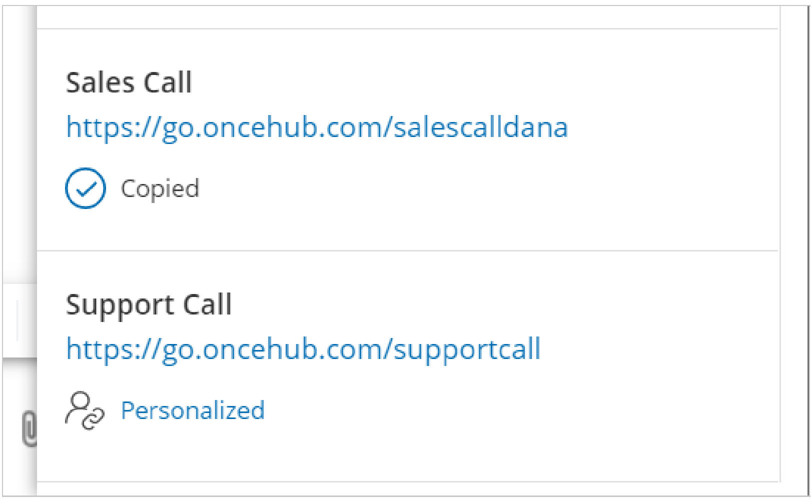


Figure 5: Personalized link copied

8. Paste the Personalized link into your email (Figure 6).

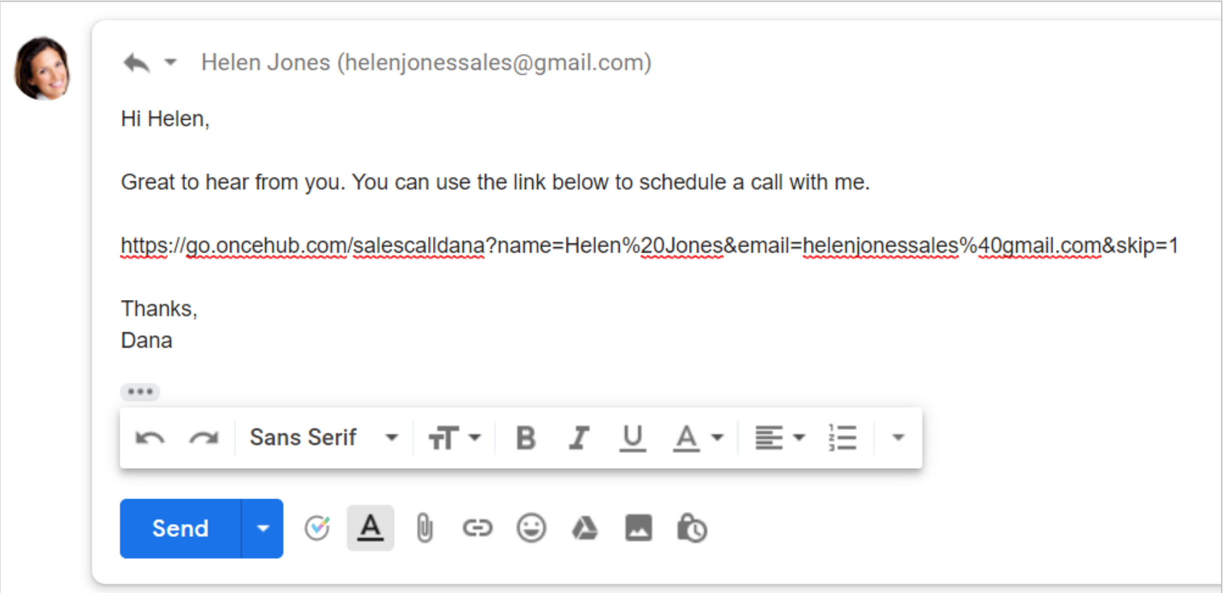


Figure 6: Pasting the Personalized link into your email

9. To turn your booking link into a customized html link, click the Insert Link button on the bottom email menu. (Figure 7).

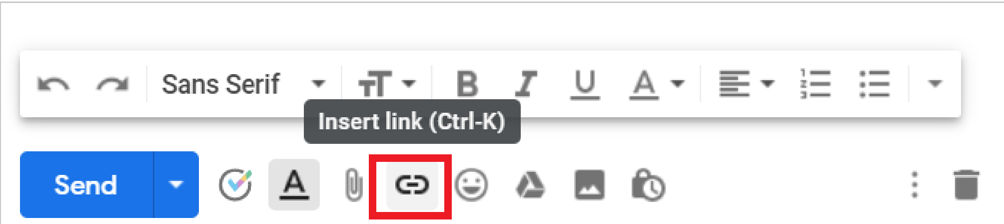


Figure 7: Insert Link button in Gmail.

10. A window will appear (Figure 8). Insert your booking link and the text you would like to display. Click OK.

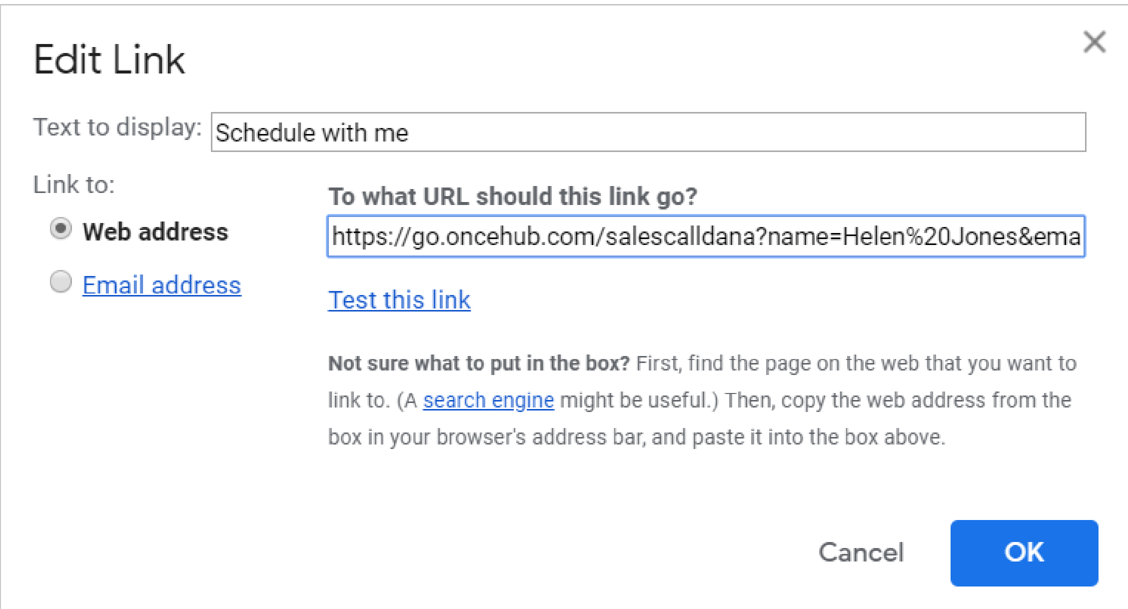


Figure 8: Insert Link window

11. Your booking link now will now appear as an html link. (Figure 9).

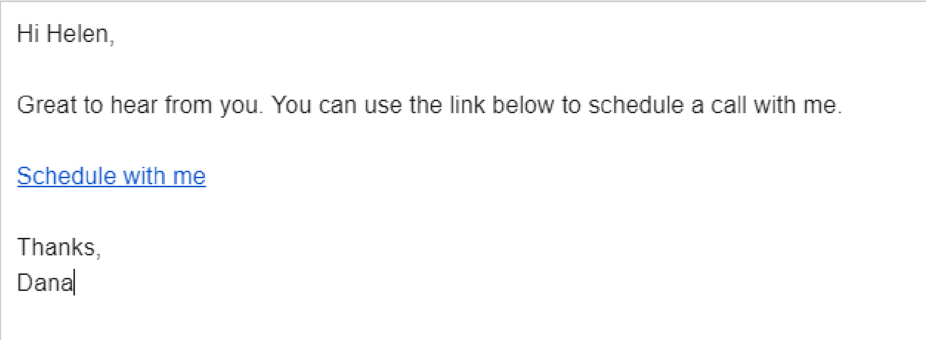


Figure 9: Html link in your email.

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).

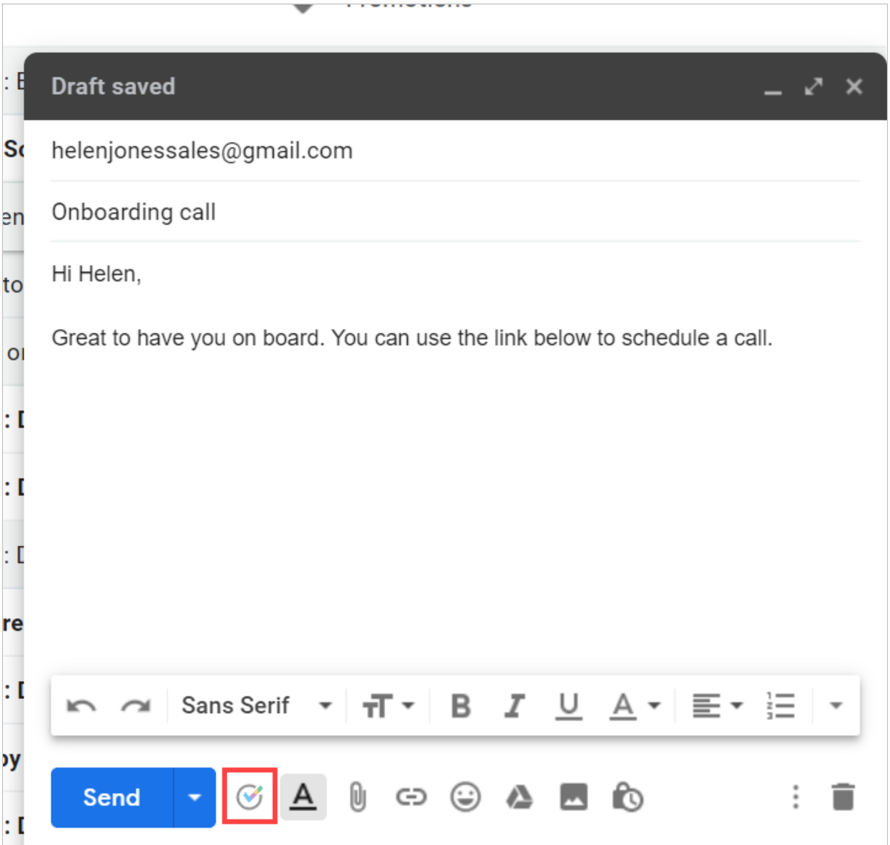


Figure 10: OnceHub for Gmail icon

5. The OnceHub for Gmail extension window will open (Figure 11).

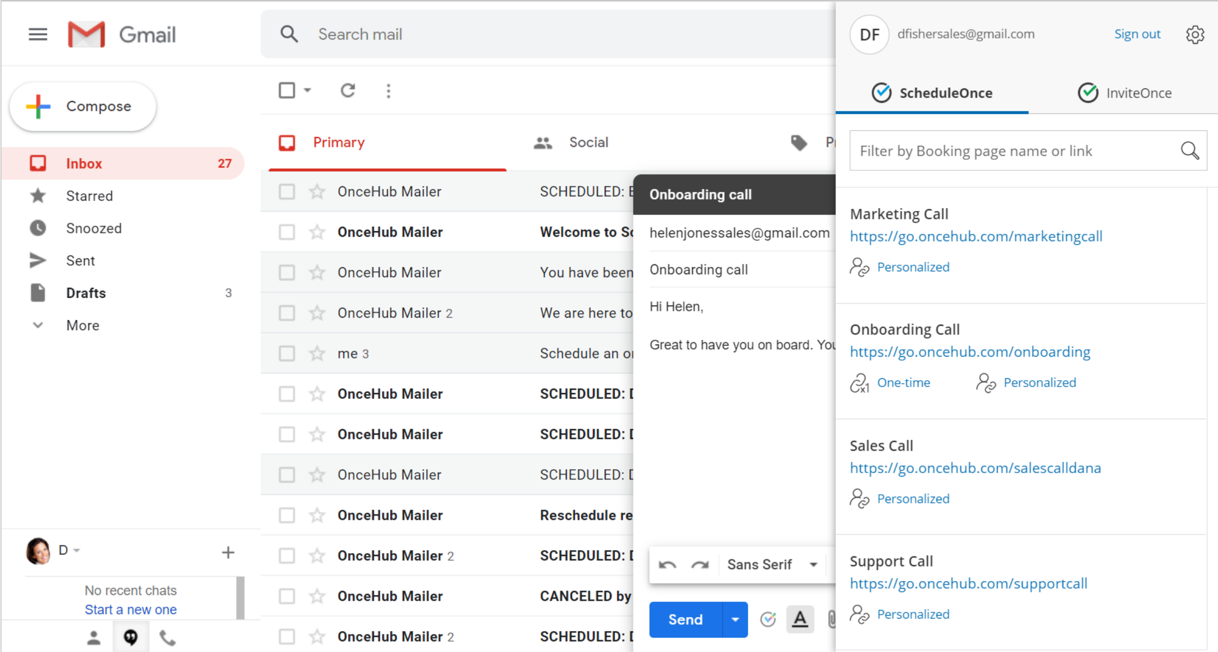


Figure 11: OnceHub for Gmail extension window

6. Click **Personalized** next to the Booking page you want to share (Figure 12).

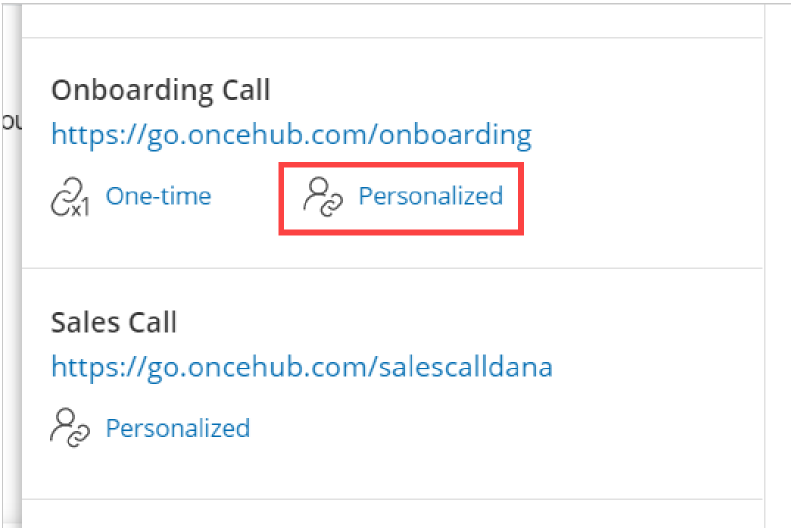


Figure 12: Generating a Personalized link

7. You will see the **Copied** confirmation when the link has been generated and copied to your clipboard (Figure 10).

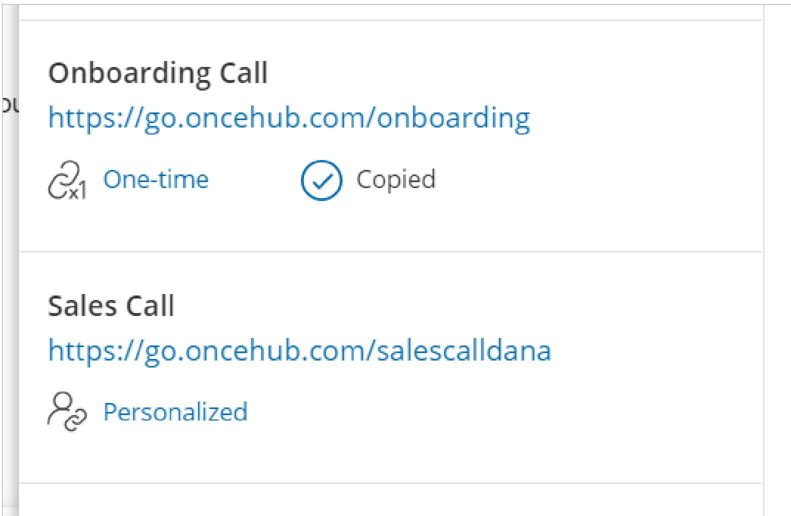


Figure 13: Personalized link copied

8. Paste the Personalized link into your email (Figure 14).

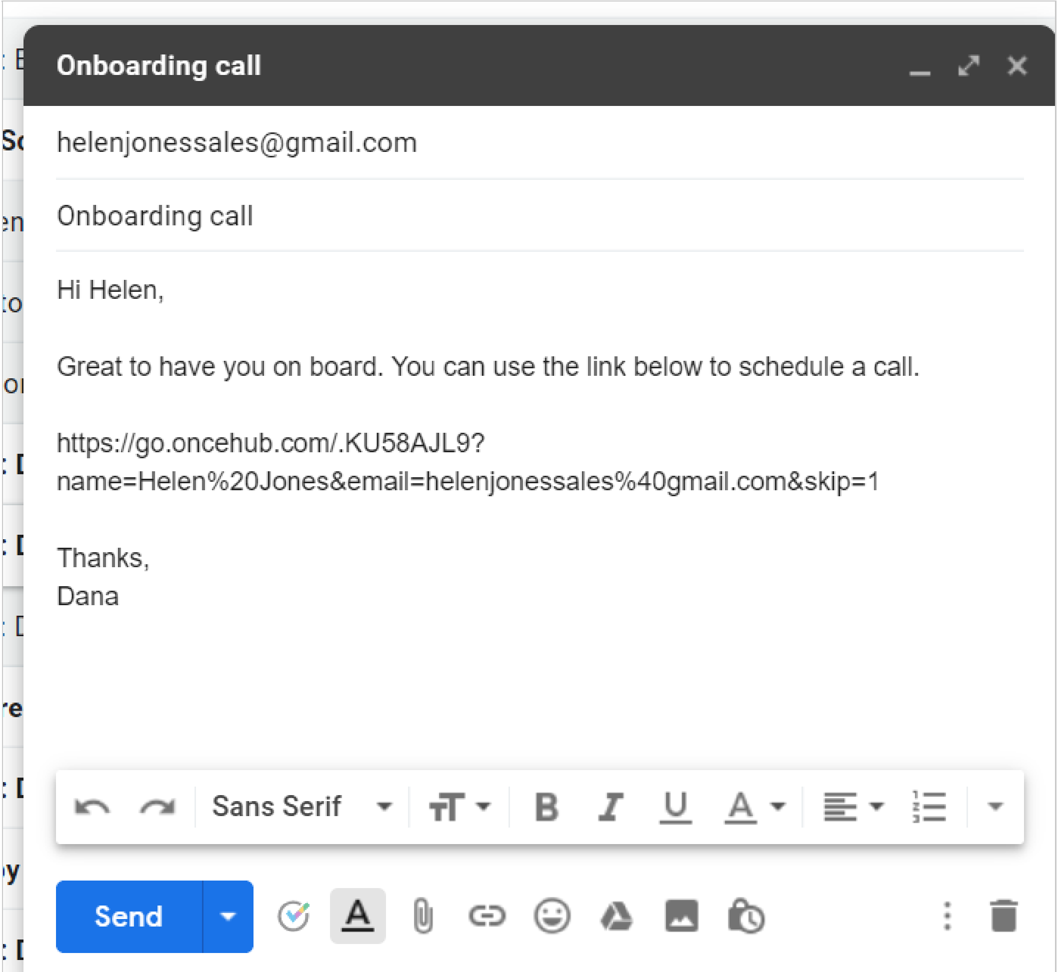


Figure 14: Pasting the Personalized link into your email

9. To turn your booking link into a customized html link, click the Insert Link button on the bottom email menu. (Figure 15).

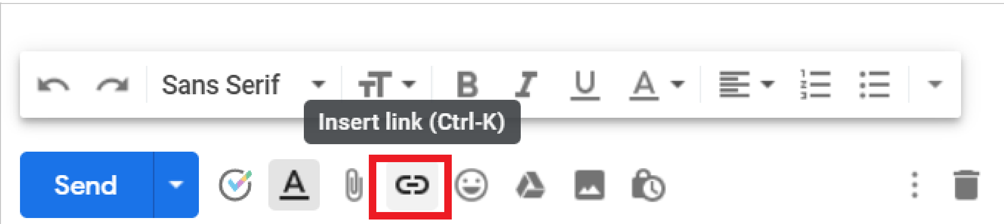


Figure 15: Insert Link button in Gmail.

10. A window will appear (Figure 16). Insert your booking link and the text you would like to display. Click OK.

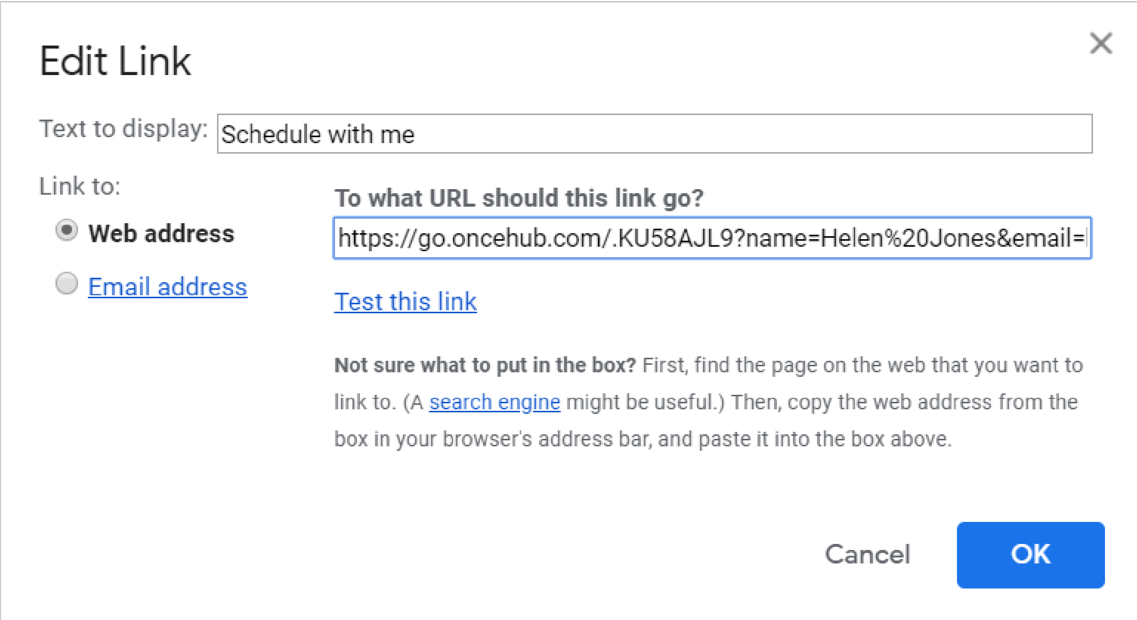


Figure 16: Insert Link window

11. Your booking link now will now appear as an html link. (Figure 17).

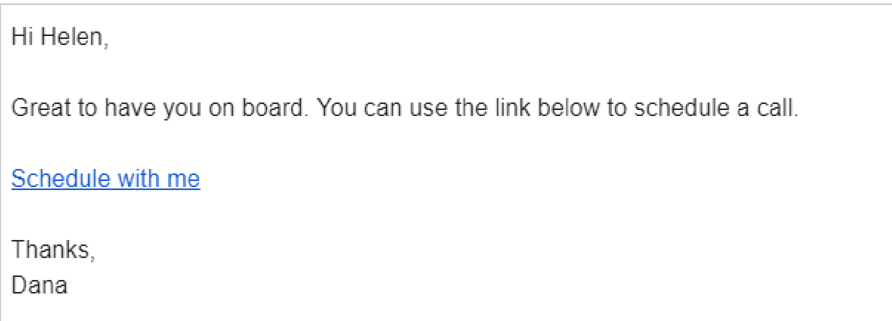


Figure 17: Html link in your email.

Sending one-time links using OnceHub for Gmail [Classic]

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).

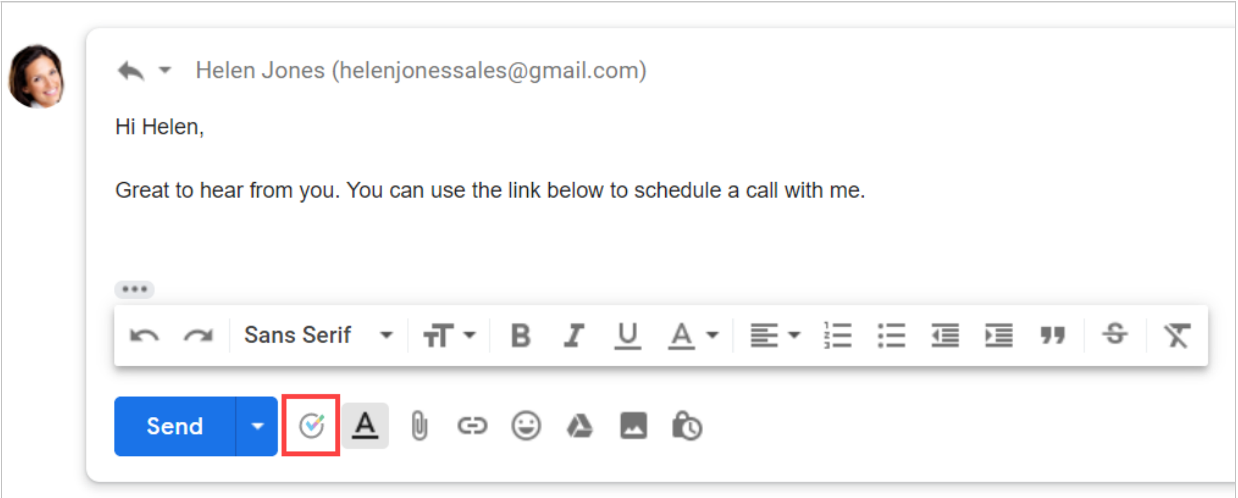


Figure 1: OnceHub for Gmail icon

5. The OnceHub for Gmail extension window will open (Figure 2).

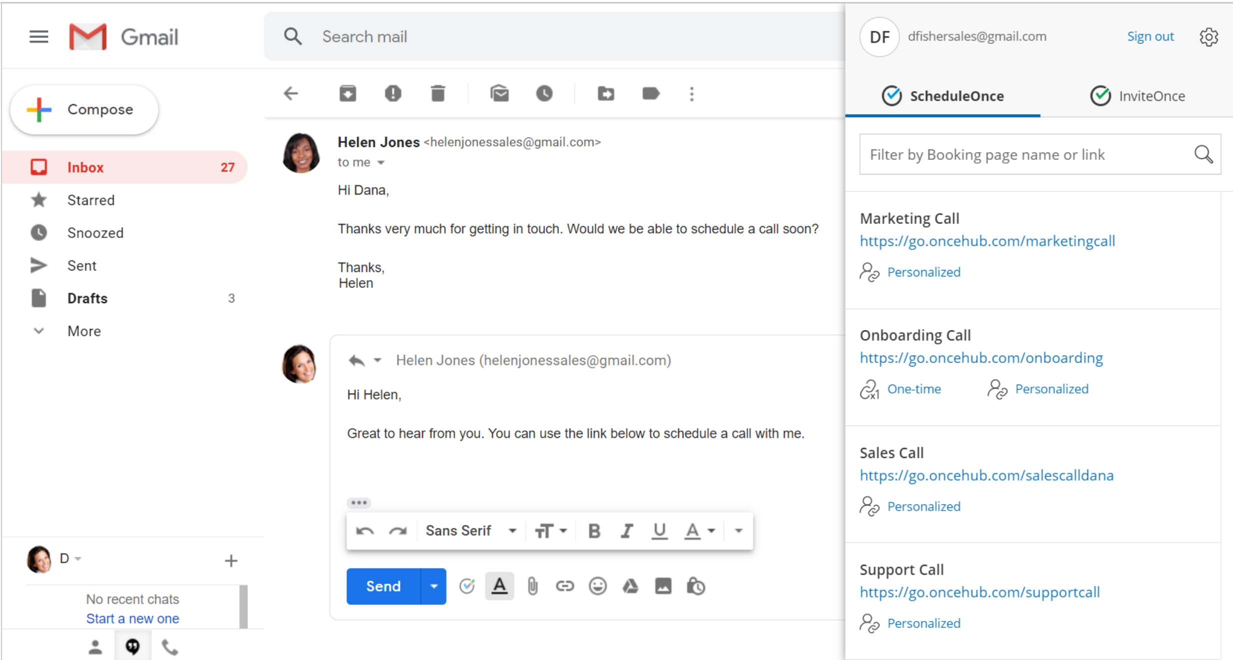


Figure 2: OnceHub for Gmail extension window

6. Click **One-time** next to the Master page you want to share (Figure 3).

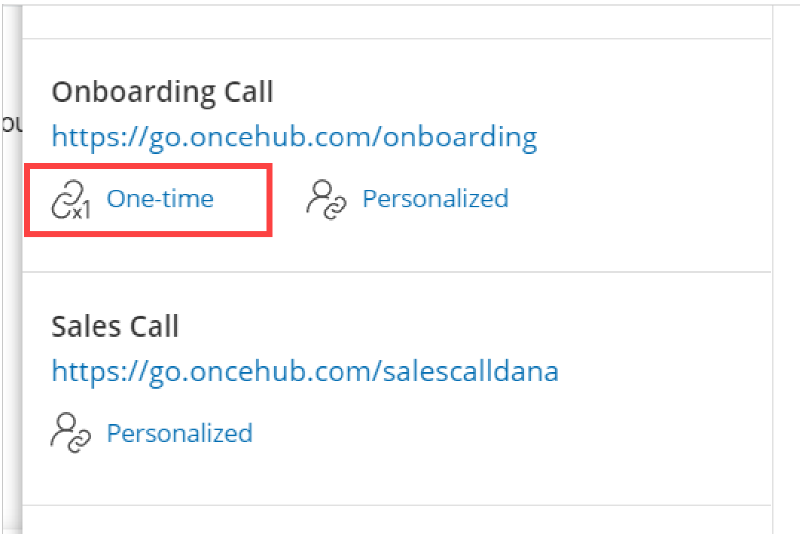


Figure 3: Generating a one-time link

7. You will see the **Copied** confirmation when the link has been generated and copied to your clipboard (Figure 4).

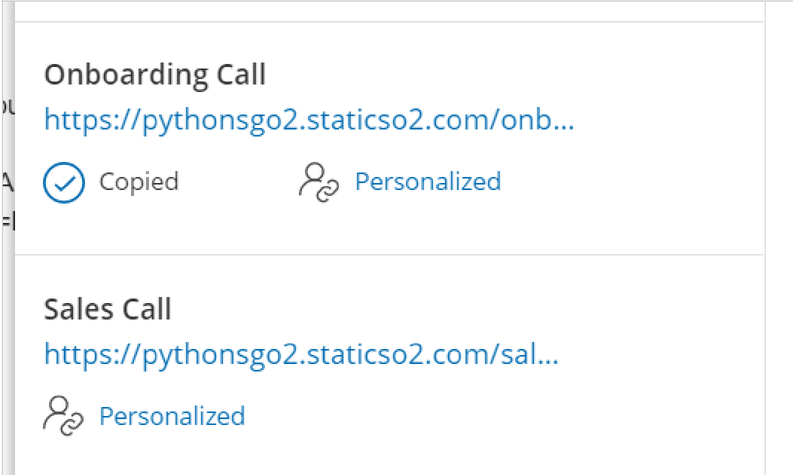


Figure 4: One-time link copied

8. Paste the one-time link into your email (Figure 5).

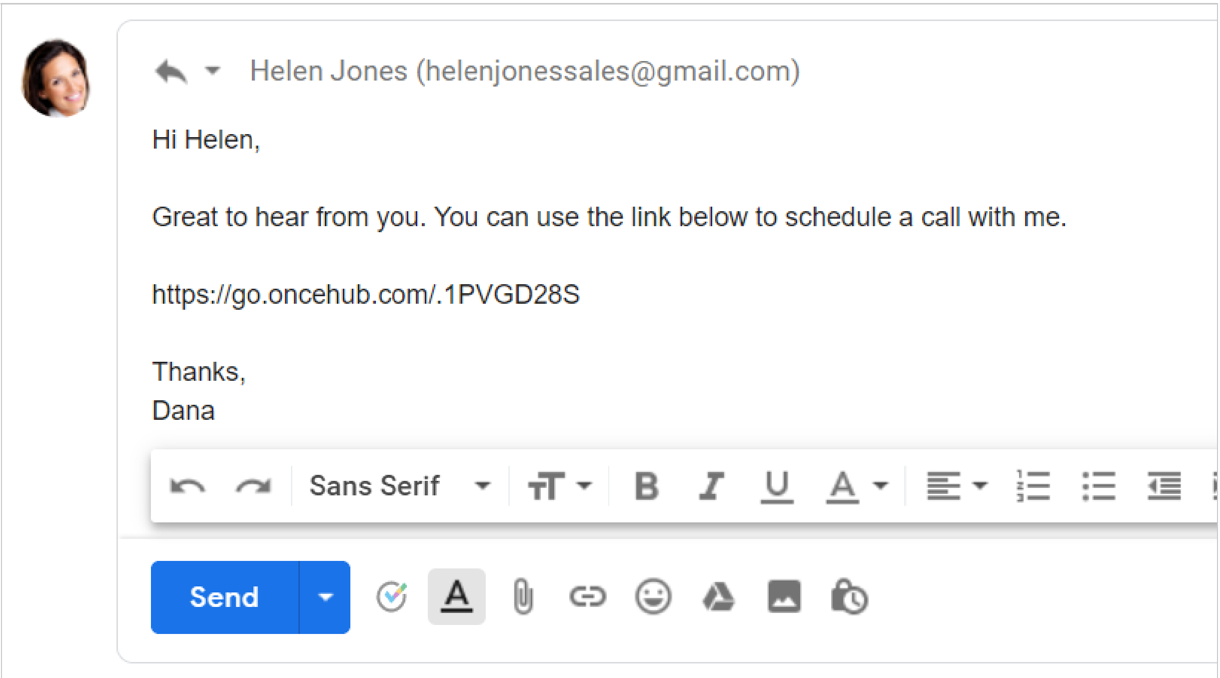


Figure 5: Pasting the one-time link into your email

9. To turn your booking link into a customized html link, click the Insert Link button on the bottom email menu. (Figure 6).

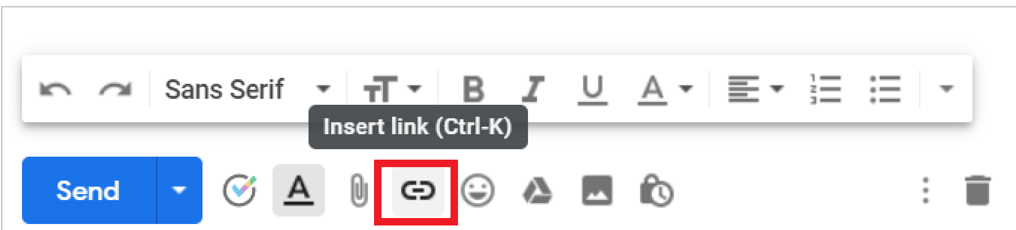


Figure 6: Insert Link button in Gmail.

10. A window will appear (Figure 7). Insert your booking link and the text you would like to display. Click OK.

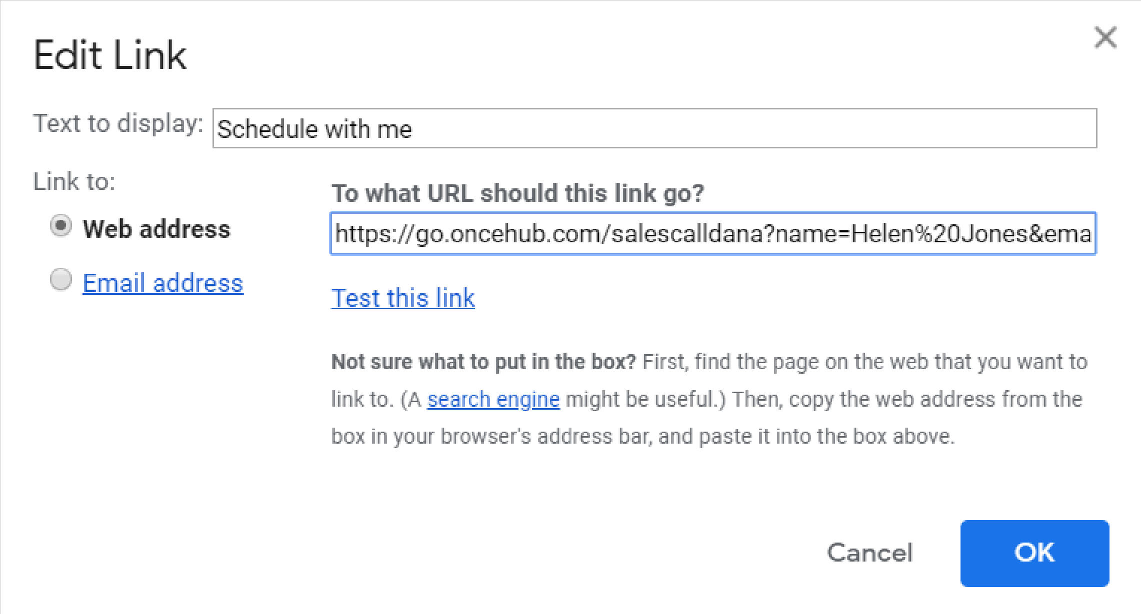


Figure 7: Insert Link window

11. Your booking link now will now appear as an html link. (Figure 8).

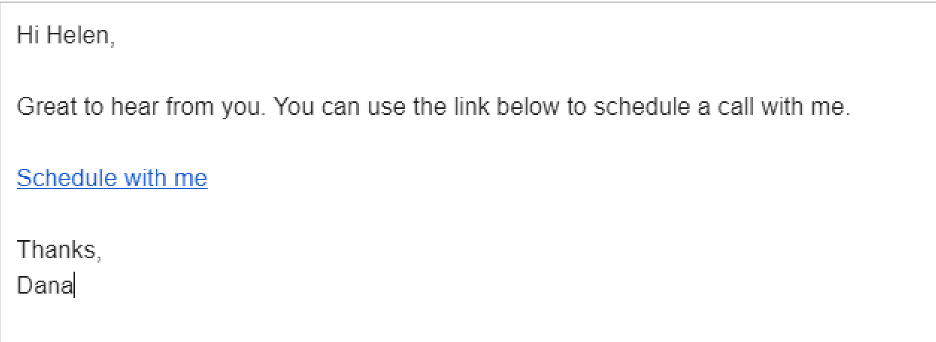


Figure 8: Html link in your email.

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).

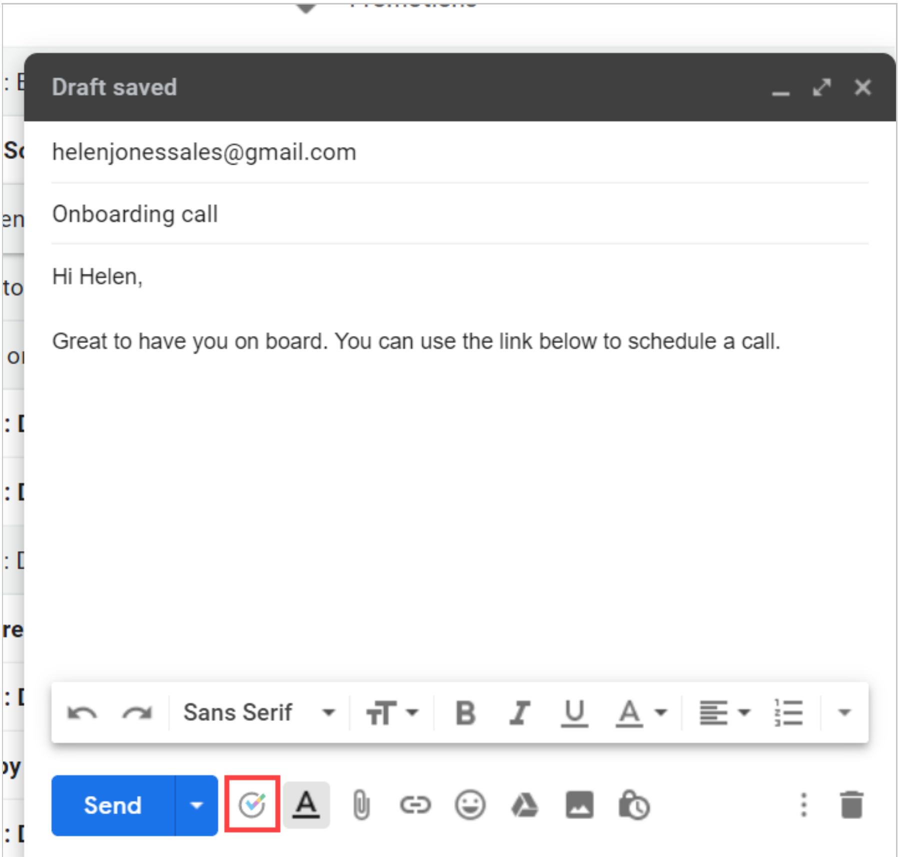


Figure 9: OnceHub for Gmail icon

5. The OnceHub for Gmail extension window will open (Figure 10).

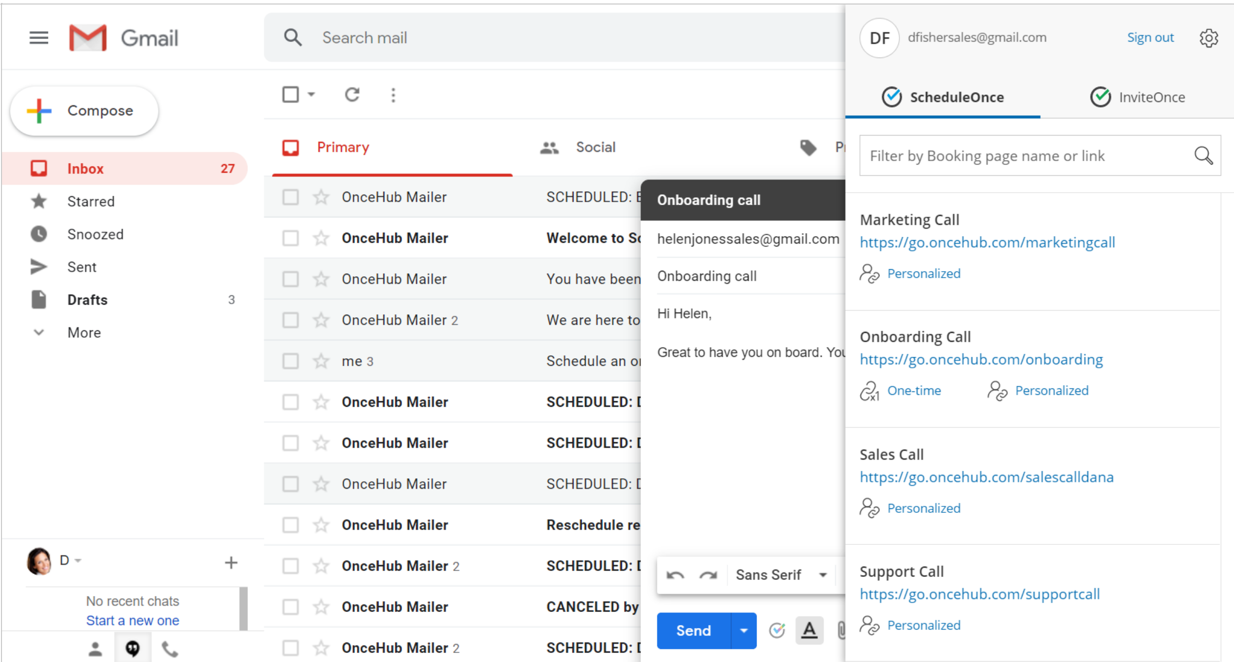


Figure 10: OnceHub for Gmail extension window

6. Click **Personalized** next to the Booking page you want to share (Figure 11).

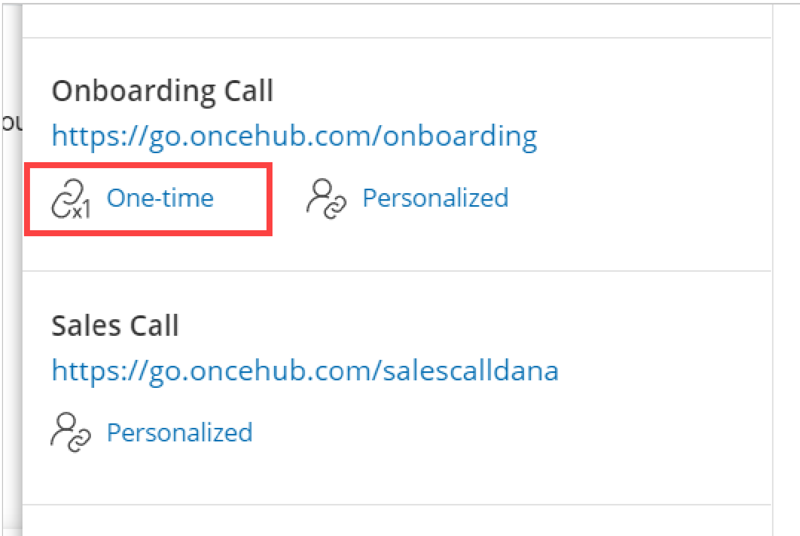


Figure 11: Generating a one-time link

7. You will see the **Copied** confirmation when the link has been generated and copied to your clipboard (Figure 12).

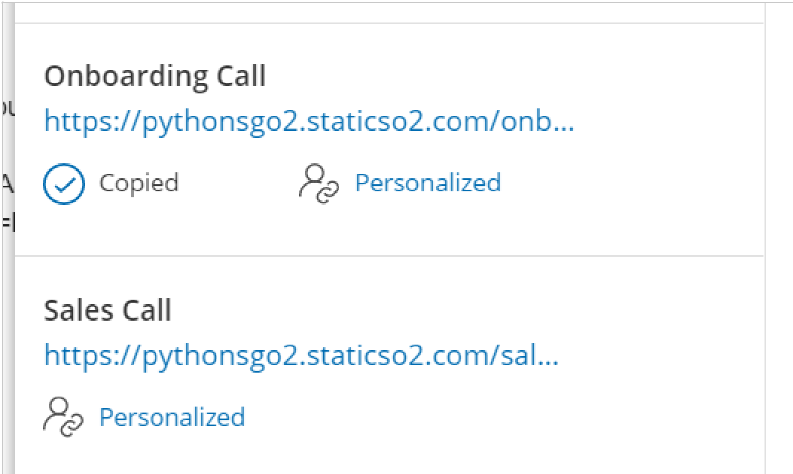


Figure 12: One-time link copied

8. Paste the one-time link into your email (Figure 13).

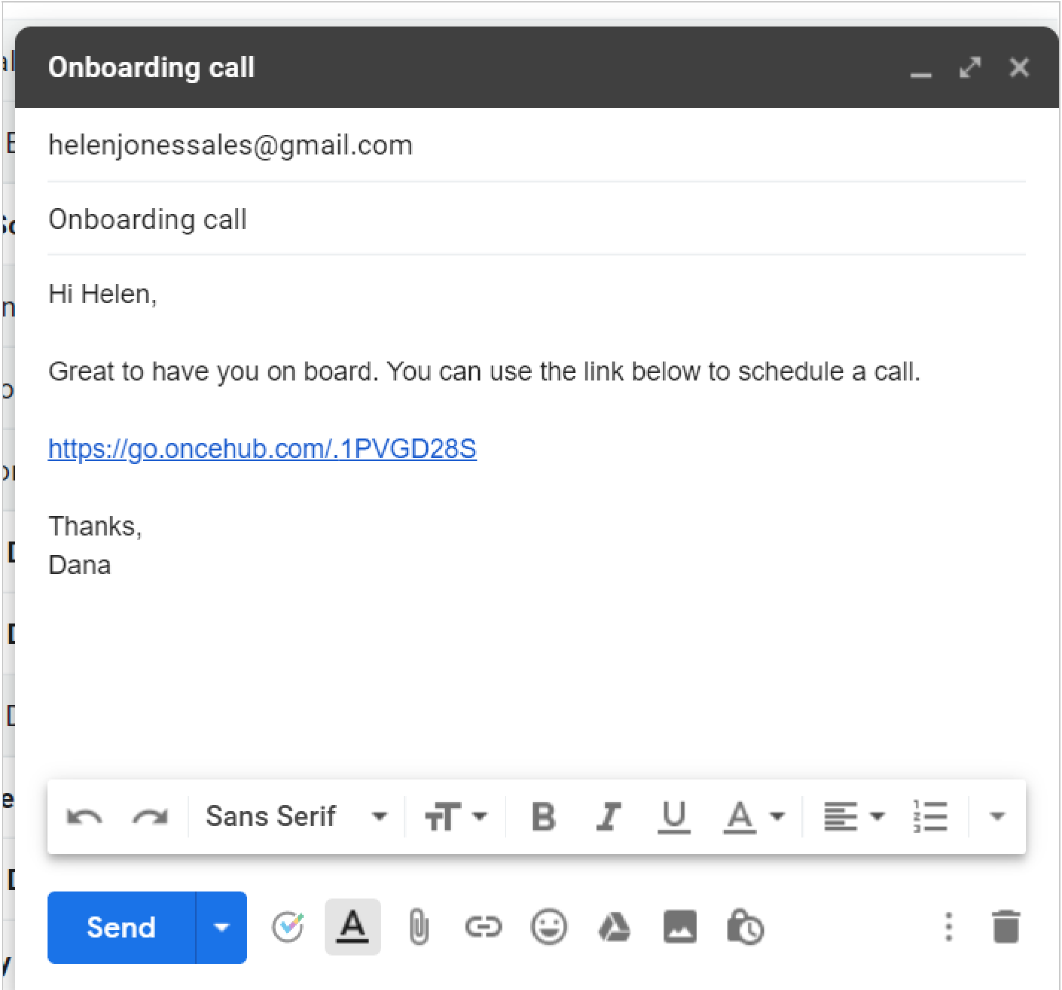


Figure 13: Pasting the one-time link into your email

9. To turn your booking link into a customized html link, click the Insert Link button on the bottom email menu. (Figure 14.)

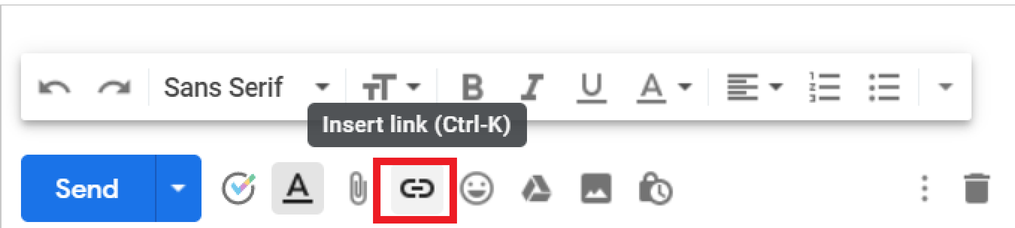


Figure 14: Insert Link button in Gmail.

10. A window will appear (Figure 15). Insert your booking link and the text you would like to display. Click OK.

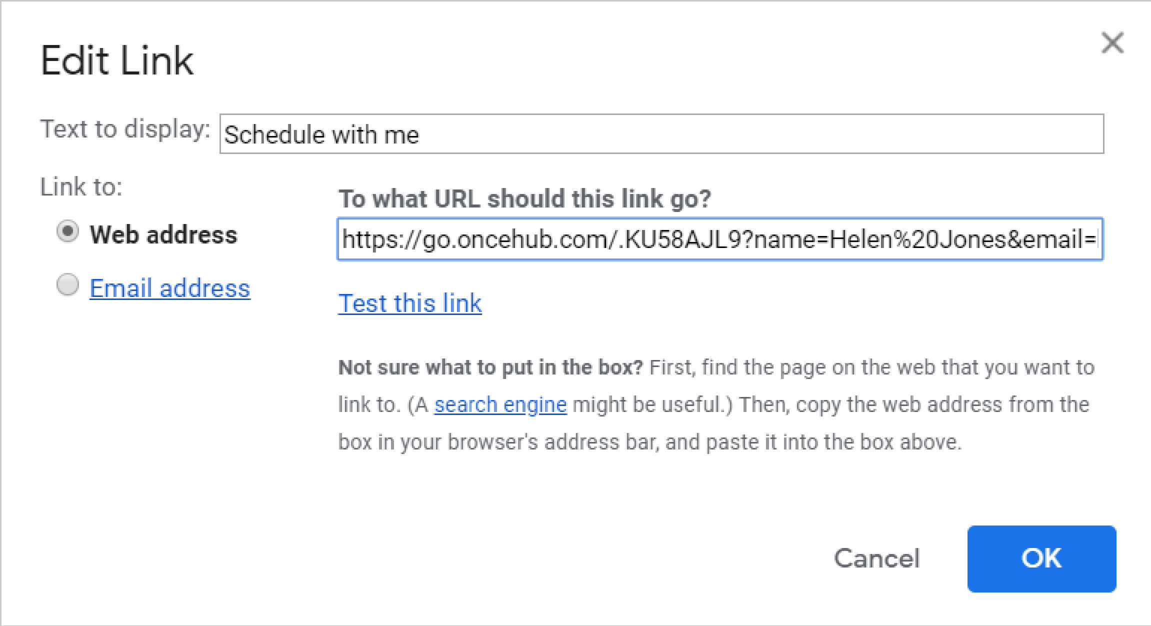
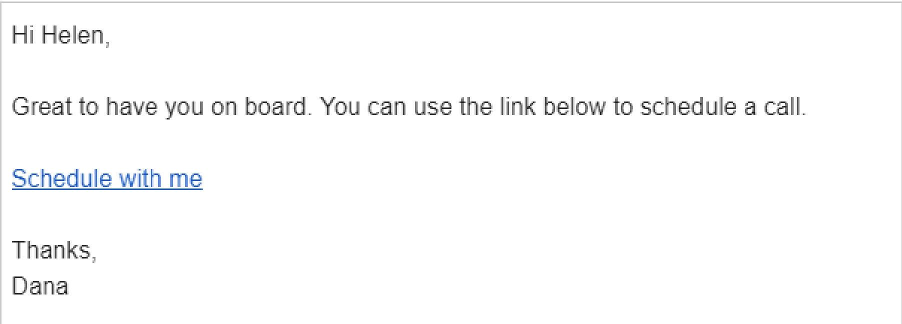


Figure 15: Insert Link window

11. Your booking link now will now appear as an html link. (Figure 16).


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.

OnceHub for Gmail FAQs [Classic]

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).

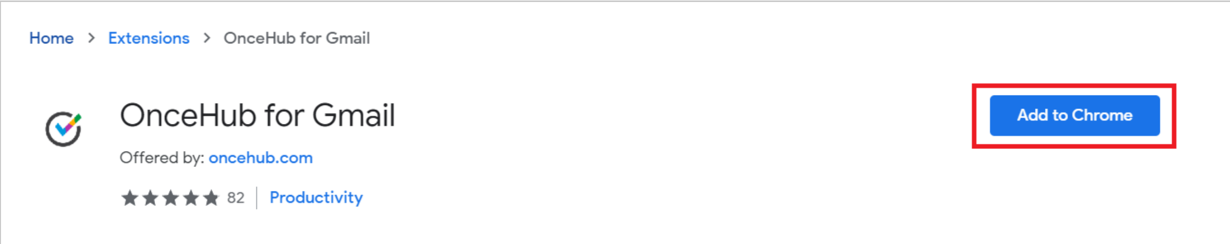


Figure 1: Add to Chrome

3. The installation permissions pop-up will appear.
4. Click **Add Extension** (Figure 2).

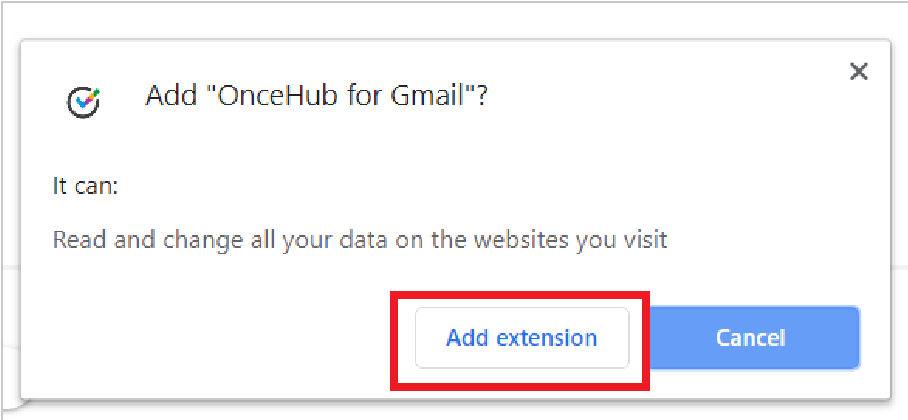


Figure 2: Add to Chrome confirmation

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).

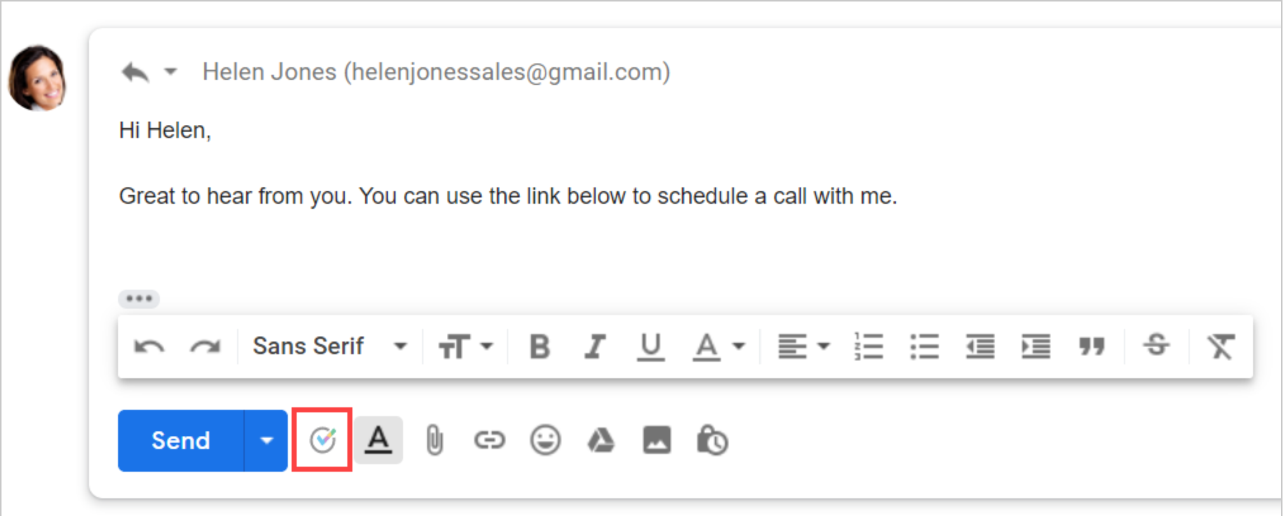


Figure 3: OnceHub for Gmail icon

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).

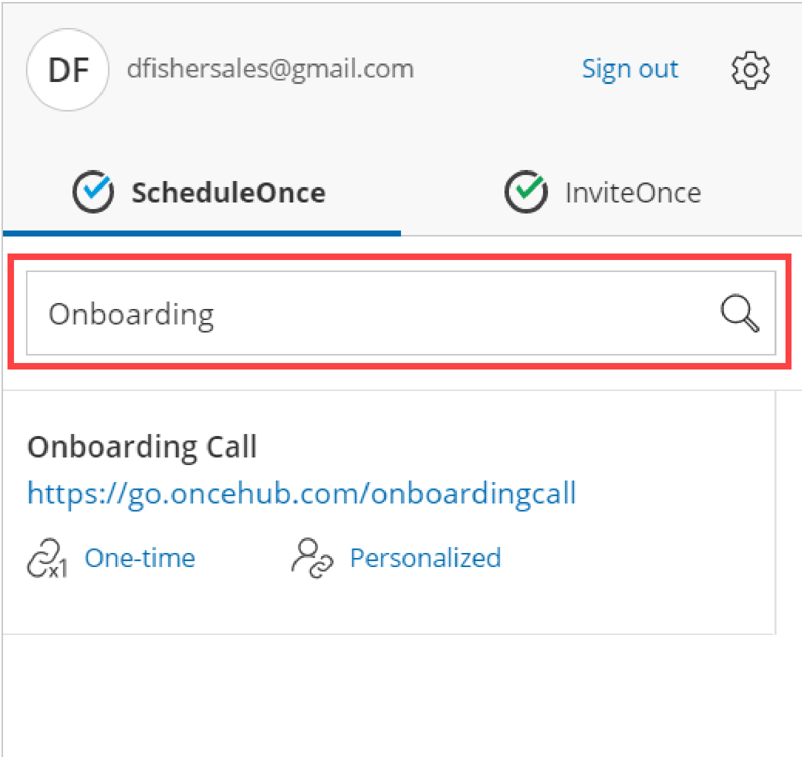


Figure 4: Filter by Booking page name or link

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).

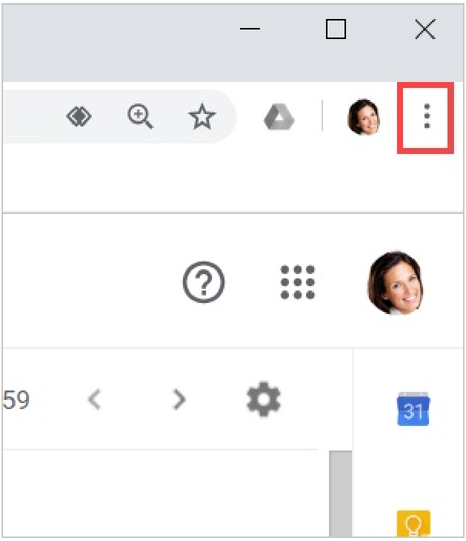


Figure 5: Chrome browser three dots (action menu)

2. In the drop-down menu, select **More tools -> Extensions**.
3. In the **OnceHub for Gmail** box, click **Remove** (Figure 6).

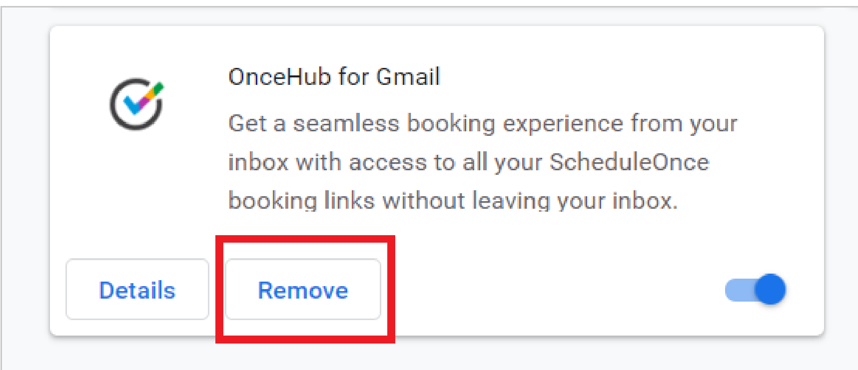


Figure 6: OnceHub for Gmail options in extensions menu.

4. Once you click **Remove**, you will see a confirmation screen (Figure 7). Click **Remove.**

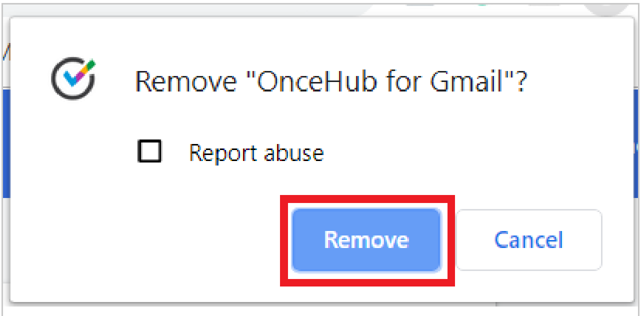


Figure 7: Removal confirmation.

The OnceHub connector for PayPal [Classic]

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 [Classic]

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).

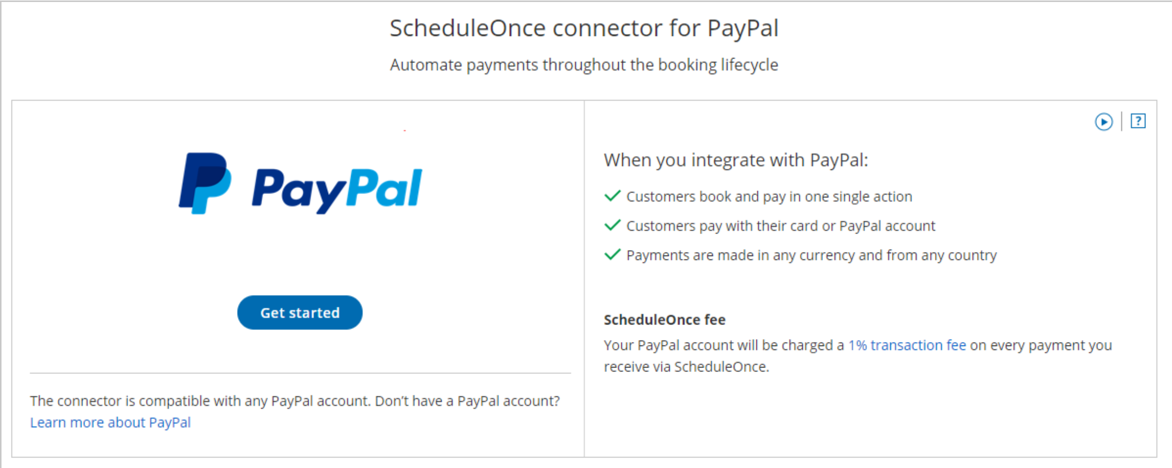


Figure 1: Paypal integration

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.

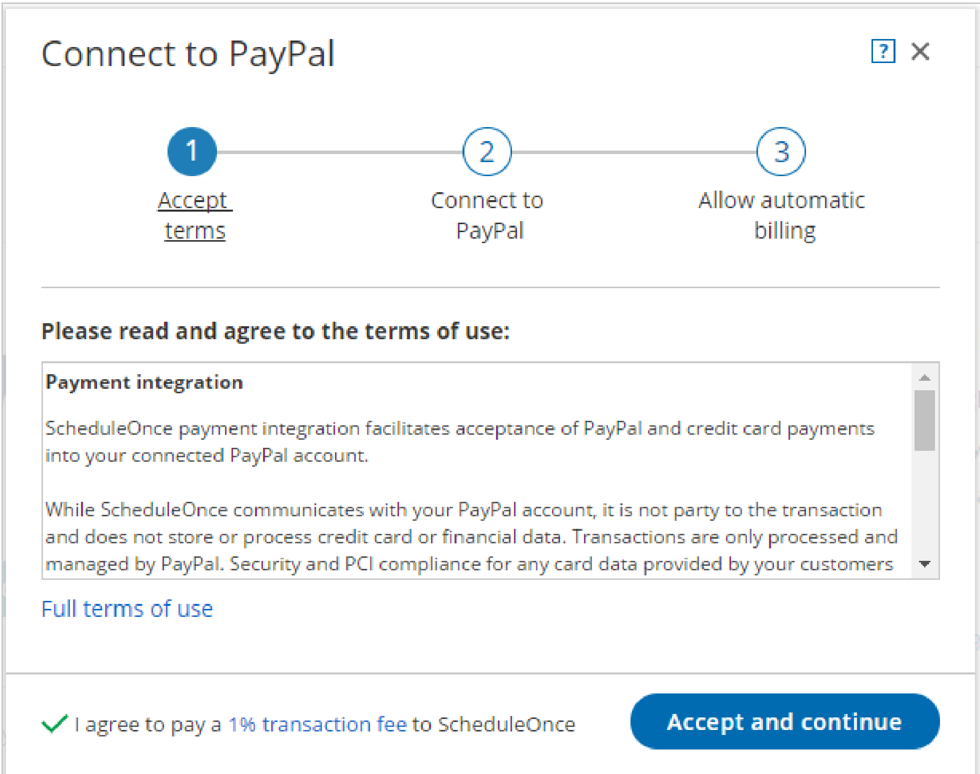


Figure 2: Accept terms

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

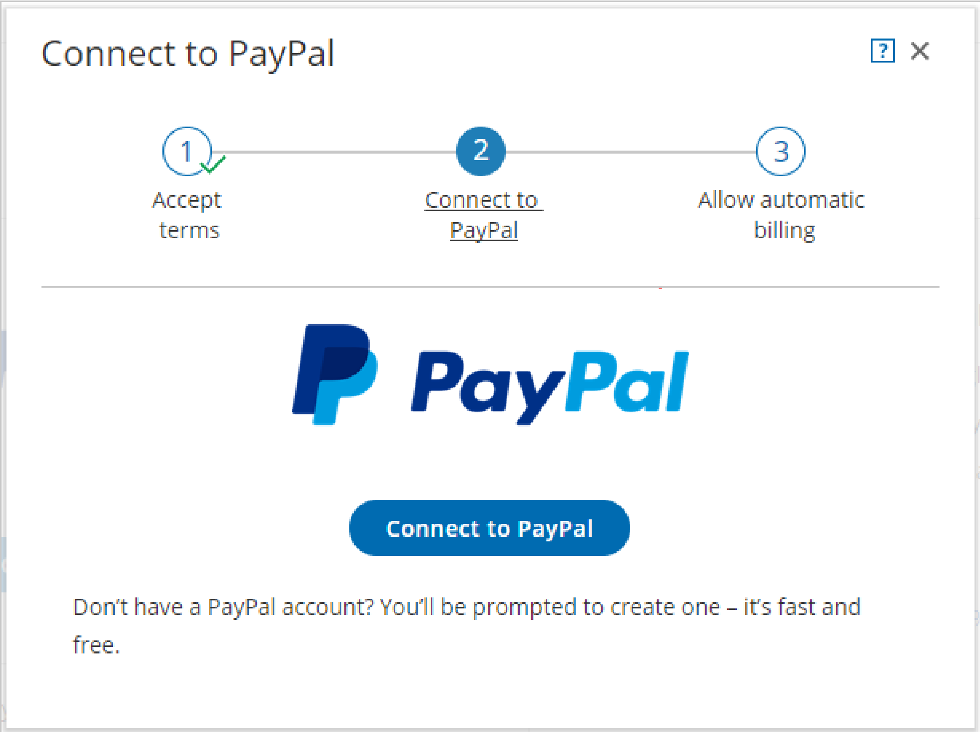


Figure 3: Connect to PayPal

> **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.

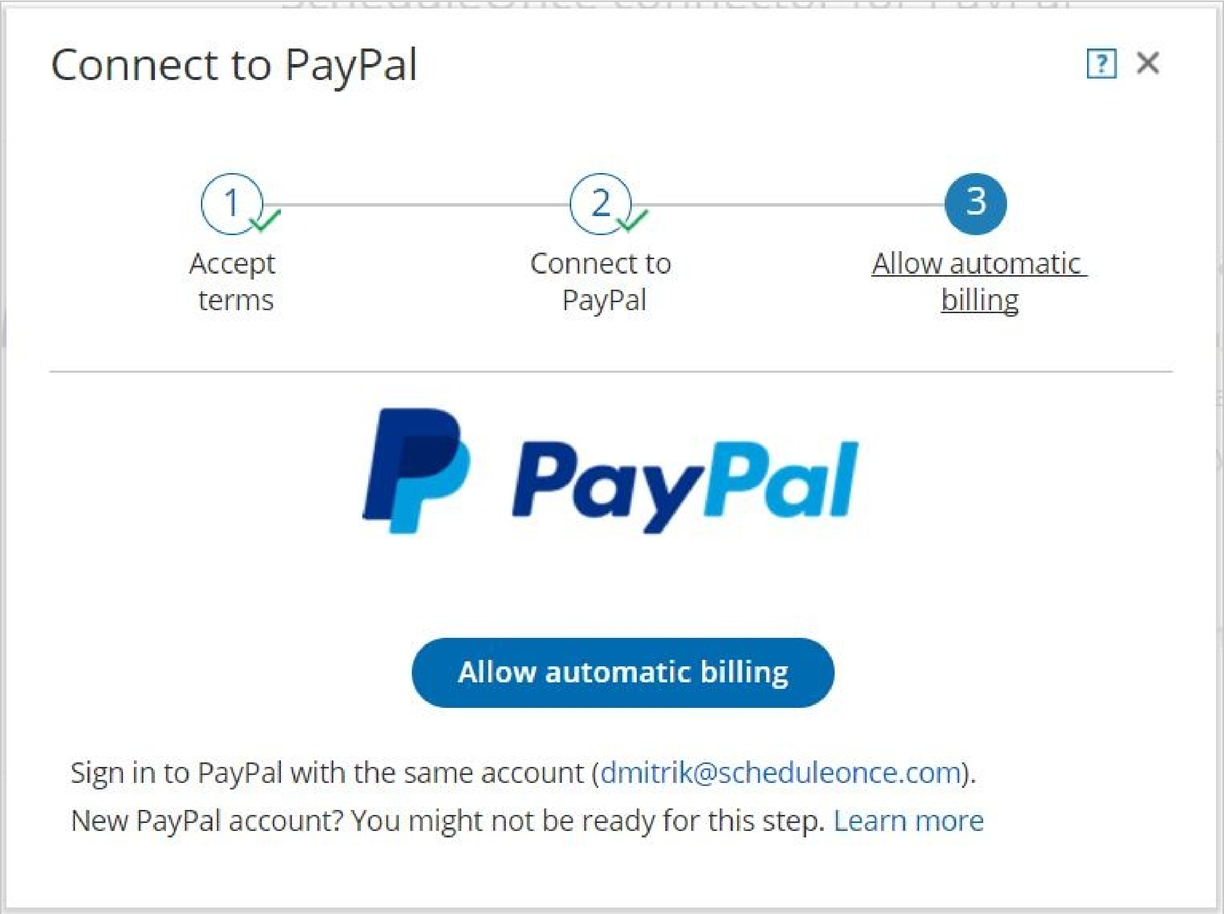


Figure 4: Allow automatic billing

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).

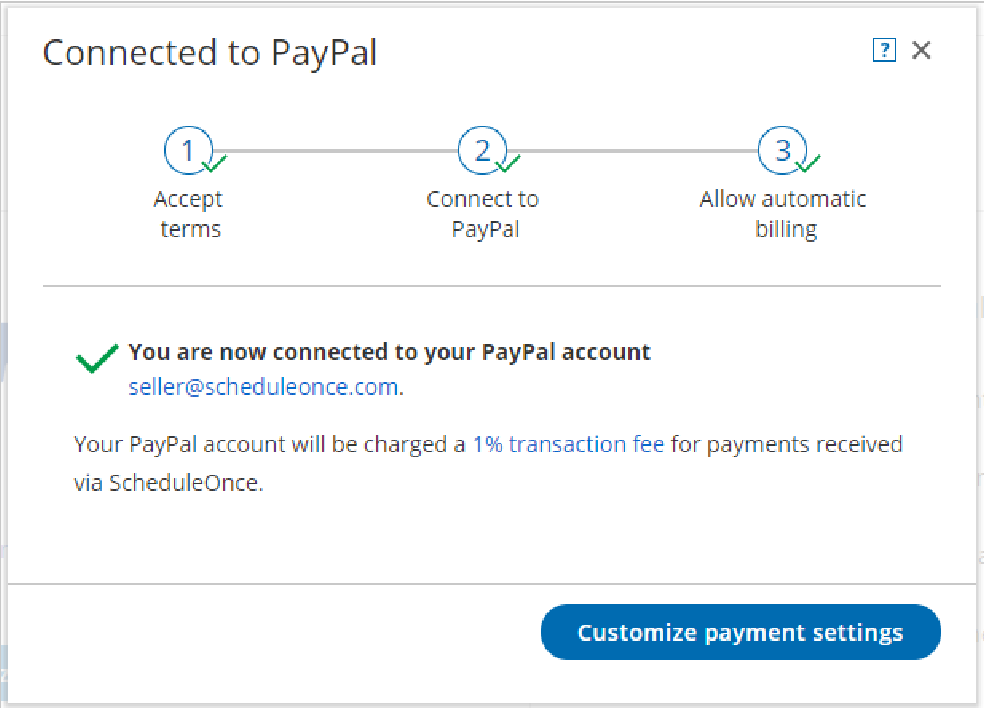


Figure 5: Confirmation message

Congratulations! Your OnceHub User app is now connected to your PayPal account. Next you can customize the payment settings for your account.

Testing the OnceHub connector for PayPal [Classic]

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. To set up the connector, all you need to do is connect your PayPal account and configure payment settings. Once that's done, OnceHub takes care of all payment activities for you in an automated and secure manner.

In this article, you'll learn how to test transactions before introducing payment integration to your Customers.

Requirements

To test the OnceHub connector for PayPal, you must:

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

Configuring Payment integration

1. Hover over the lefthand menu and go to the Booking pages icon → open the lefthand sidebar → **Integrations** → **Payment**.
2. In the Payment settings, enable the manual and automatic processing of refunds option for your OnceHub

app.

3. In the lefthand side menu, select the Booking page icon.
4. Create a test Booking page and an Event type. Associate the Event type with the Booking page.
5. On the Event type, edit the **Payment and cancel/reschedule policy** section.
6. In the **Payment and pricing** step, select the **Display a price and collect payment via OnceHub** option and set the price to *1.00 USD.* Note that you can use any currency that your PayPal account accepts.
7. In the **Cancellation policy** setting, select the option for your policy and set a refund amount. For example, the refund amount can be *50% of the Event type price.*
    - **Anytime**: This means that Customers can cancel right before the scheduled meeting time. This can be in a matter of minutes.
    - **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. Values range from 15 minutes to 14 days.
8. In the **Reschedule policy** setting, select the option for your policy and set a reschedule fee. For example, the reschedule fee can be *10% of the Event type price.*
    - **Anytime**: This means that Customers can reschedule right before the scheduled meeting time. This can be in a matter of minutes.
    - **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. Values range from 15 minutes to 14 days.
9. Save the **Payment and cancel/reschedule** settings.

Make a test booking and accept payment via OnceHub

1. In the lefthand side menu, select the Booking page icon.
2. Open your test Booking page's action menu (...), select **Open Public link** and make a test booking.
3. For testing purposes, pay for the service with a credit card that is not used in your PayPal account. This will allow you to see the card transactions in your PayPal account.
4. Go to the Activity stream in your OnceHub account and check the activity created. The **Payment details** tab includes the paid transaction. In addition, you can also check your PayPal account to view the paid transaction.

Reschedule a test booking and accept payment via OnceHub

1. From the test email account, open the scheduled email notifications and click the Cancel/reschedule link.
2. On the Cancel/reschedule page, check the Reschedule policy description and click **Reschedule**.
3. Reschedule the booking and use the same **credit/debit card** you used previously to pay for the reschedule fee.
4. Go to the **Activity stream** in OnceHub, check the activity that is rescheduled. The **Payment details** tab includes the rescheduled fee transaction. In addition, you can also check your PayPal account to view the paid transaction.

Cancel a test booking and issue automatic refund

1. From the test email account, open the scheduled email notifications and click the Cancel/reschedule link.

2. On the Cancel/reschedule page, check the Cancellation policy description and click **Cancel the booking**.
3. Go to the **Activity stream** in OnceHub, check the activity that is canceled. The **Payment details** tab includes the refund transaction. In addition, you can also check your PayPal account to view the refund transaction.

Congratulations! You're done. Now you can refine your settings and make payment integration available to your Customers.

Payment integration throughout the booking lifecycle [Classic]

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).

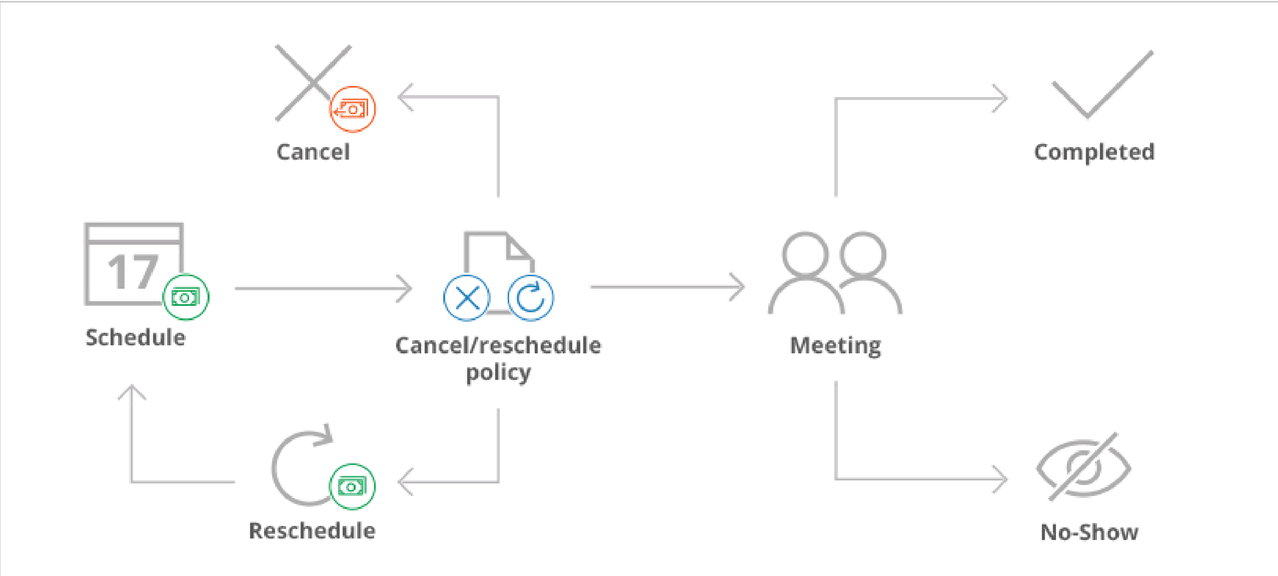


Figure 1: Payment integration throughout the booking lifecycle

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.

Granting permissions to OnceHub [Classic]

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).

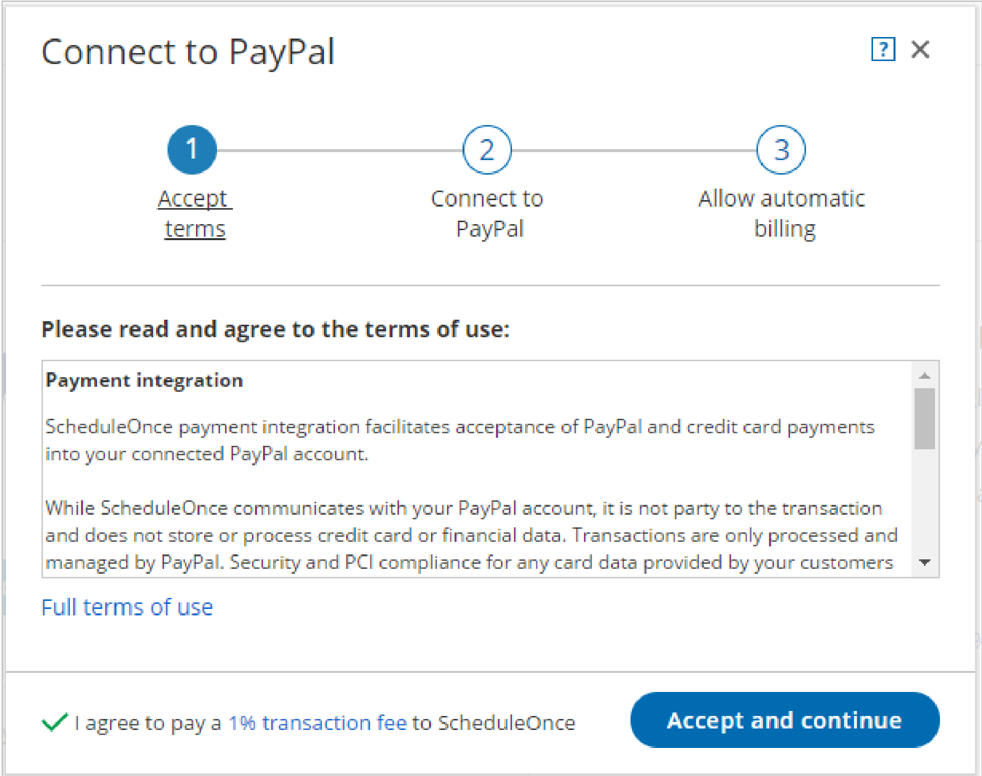


Figure 1: Accept Terms

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.

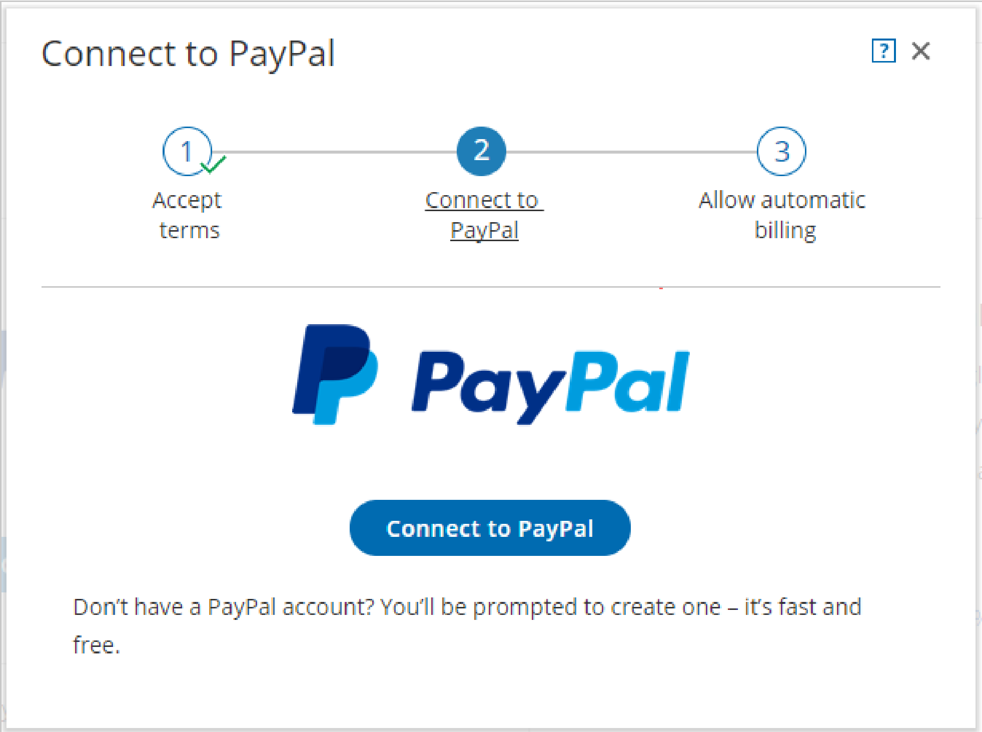


Figure 2: Connect to PayPal

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

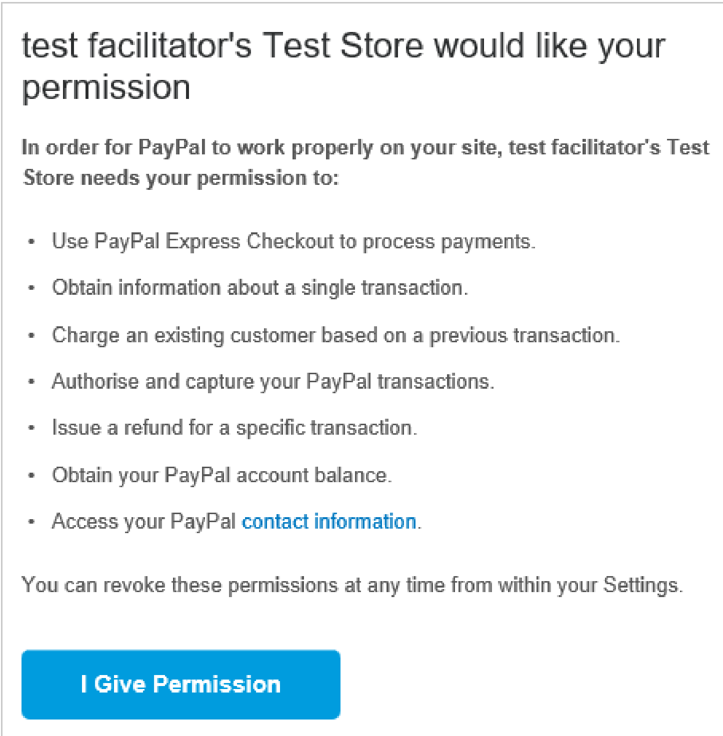


Figure 3: Granting permissions

(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.

OnceHub transaction fee [Classic]

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.

Allowing automatic billing [Classic]

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).

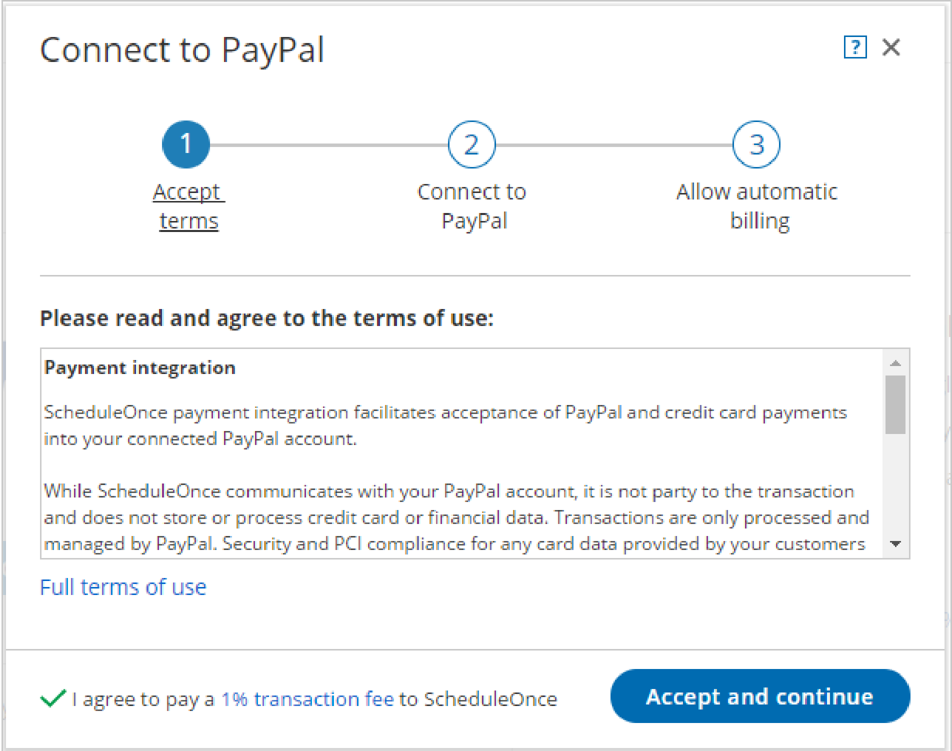


Figure 1: Accept terms

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

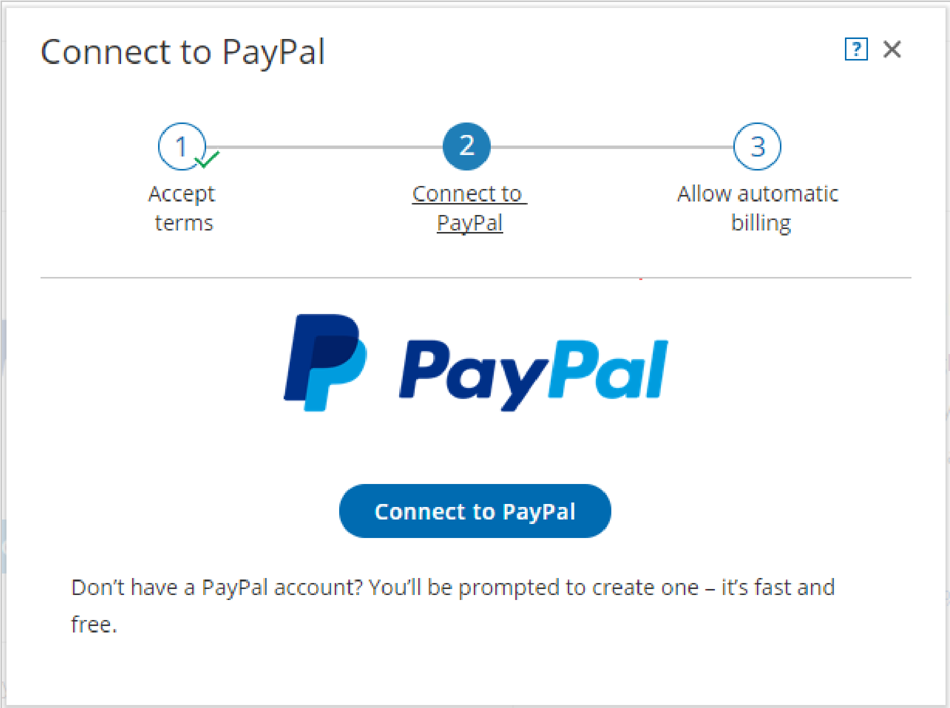


Figure 2: Grant permissions

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.

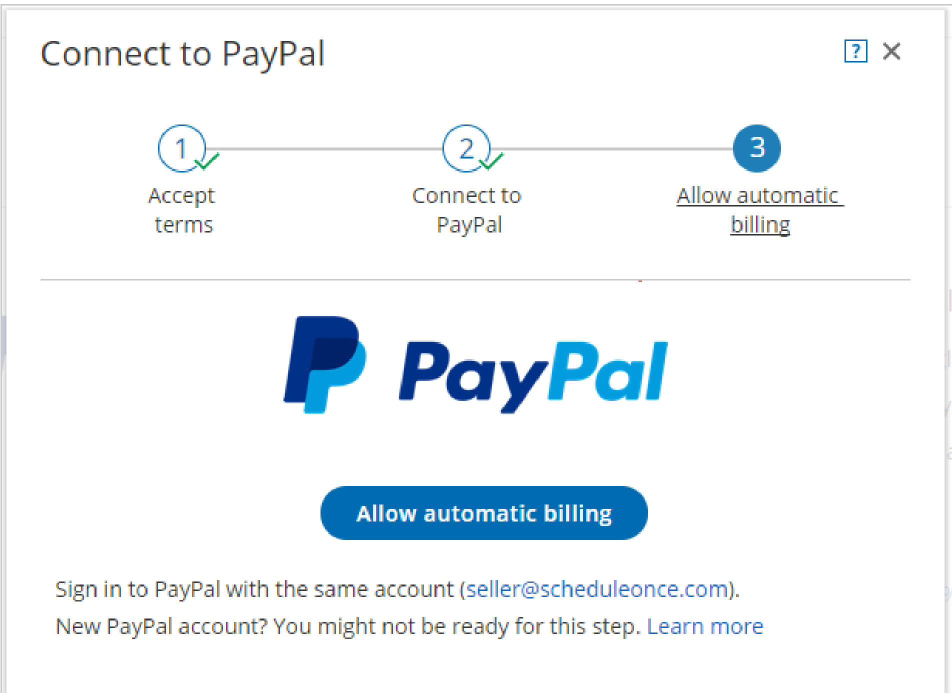


Figure 3: Allow automatic billing

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).

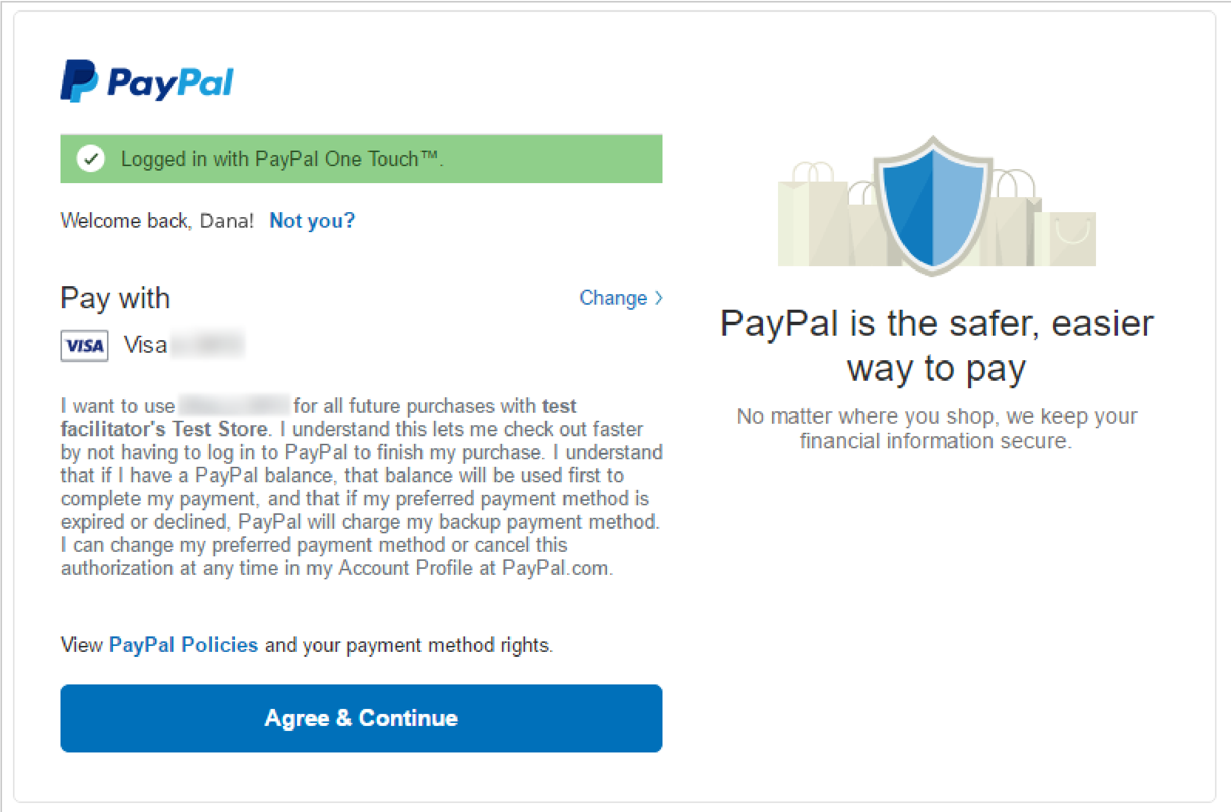


Figure 4: PayPal automatic billing

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 [Classic]

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 currency settings [Classic]

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

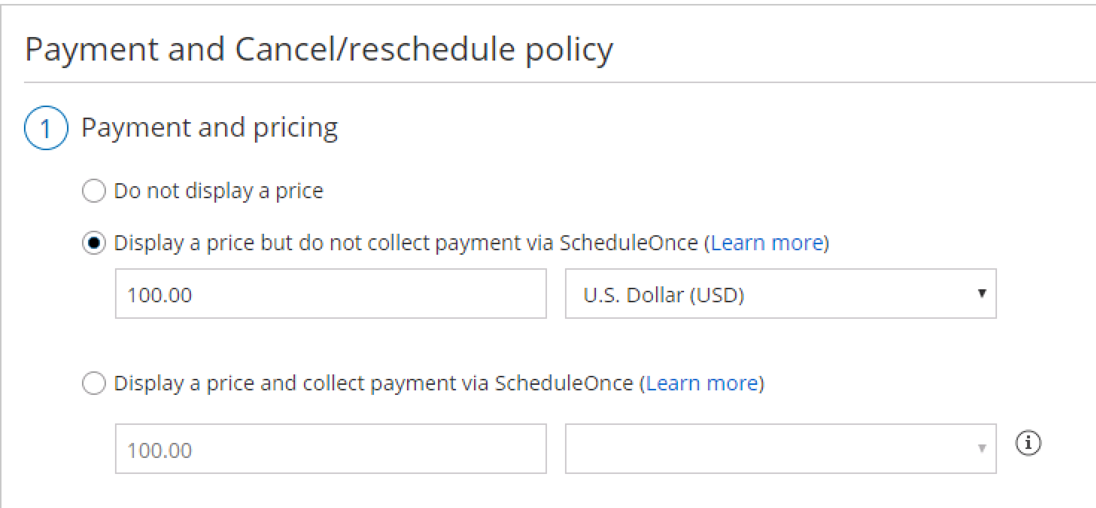


Figure 1: Payment settings in Event types

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

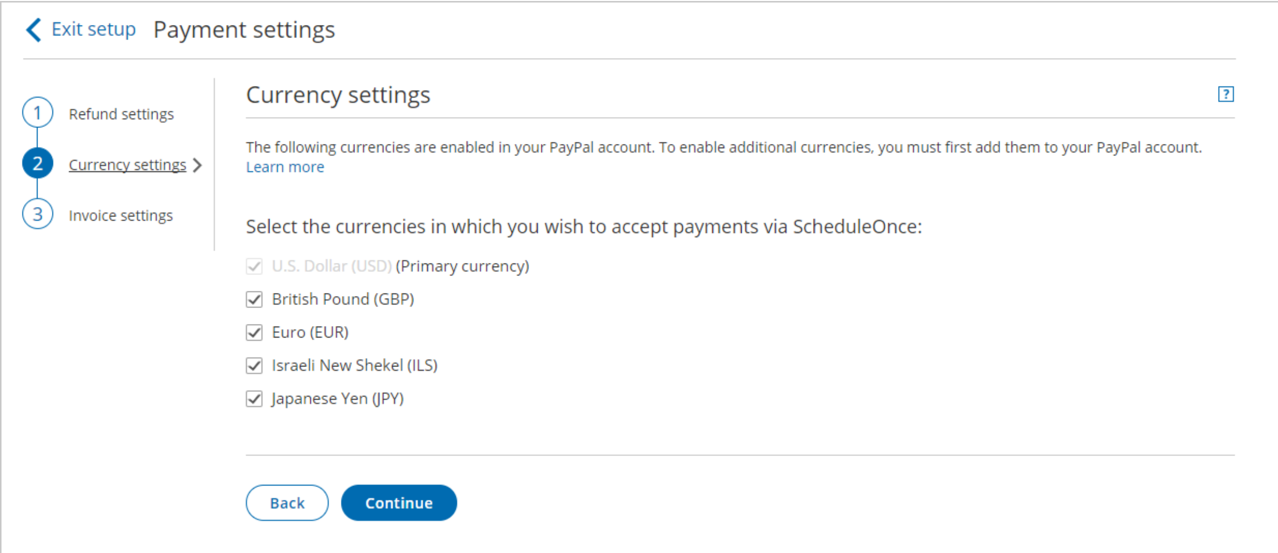


Figure 2: Currency tab

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 [Classic]

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).

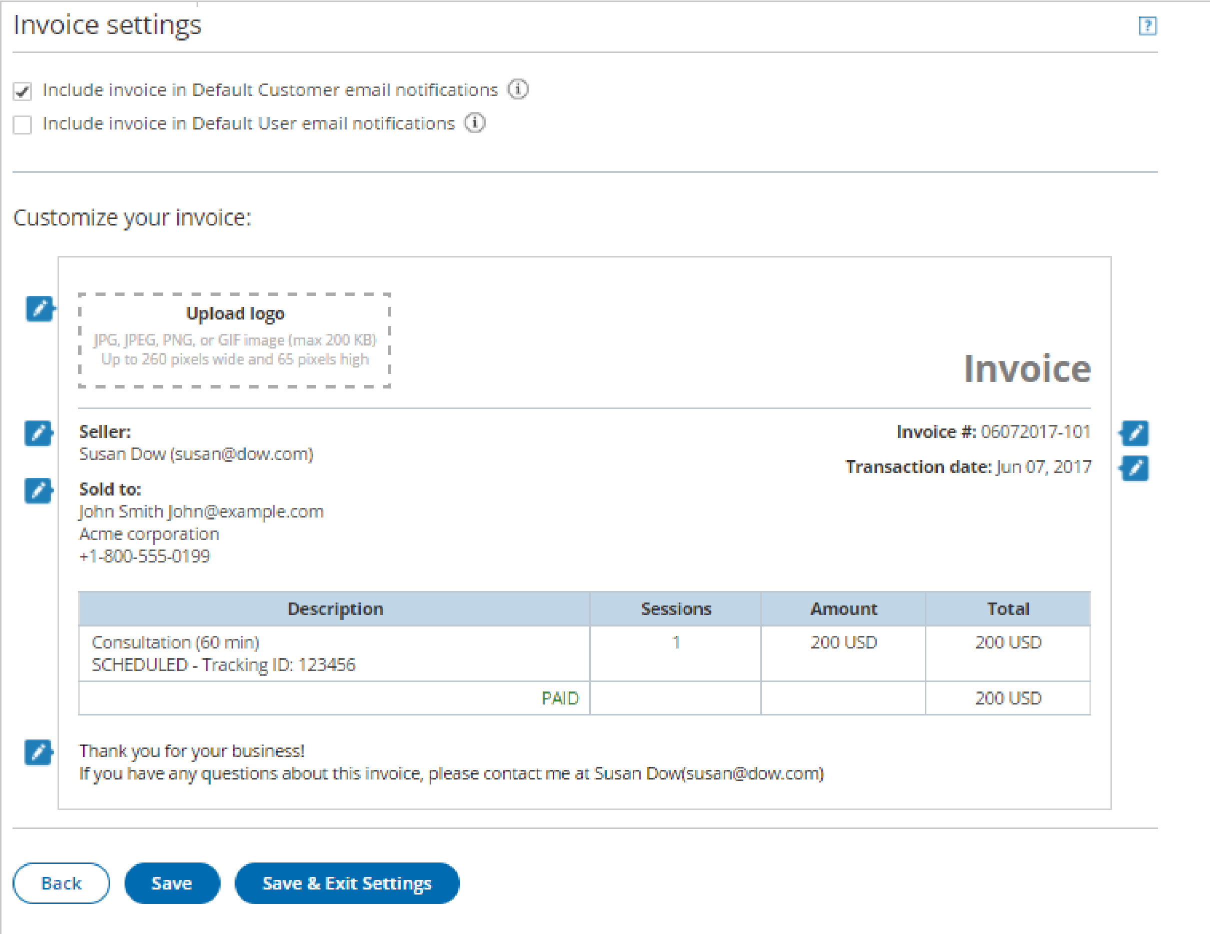


Figure 1: Invoice settings

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).

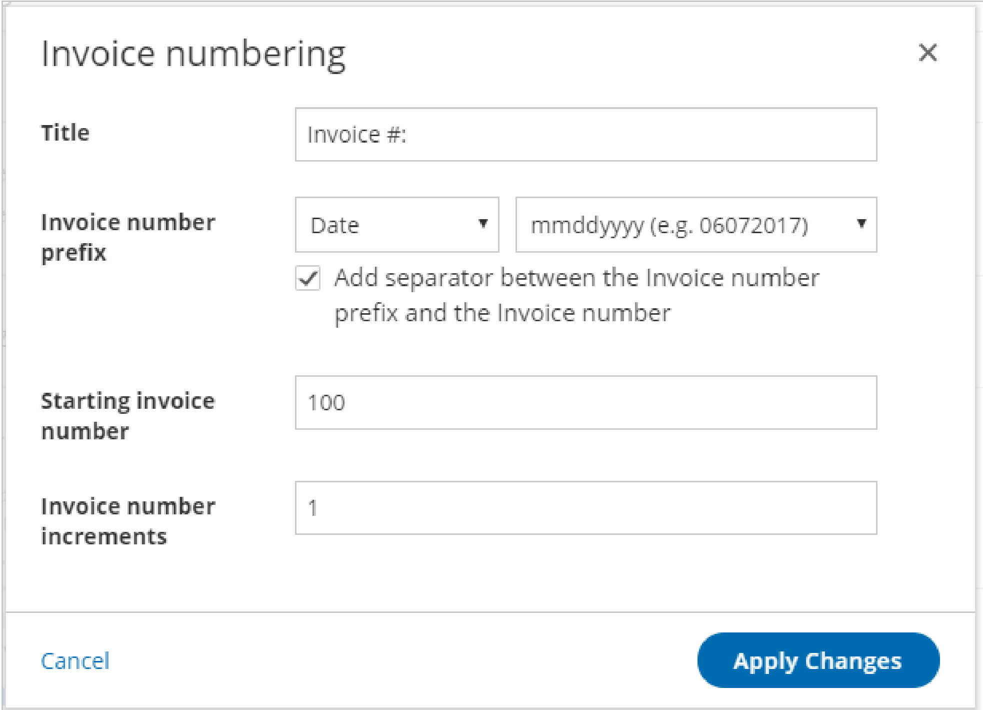
- **Invoice prefix:** The Invoice prefix can be a date or a custom text. Custom text can be a maximum of ten characters: 0 to 9 and can only contain alphanumeric characters: 0-9 a-z A-Z. It does not in include special characters such as *space,\,’,”,/,&,<.>,=,[,].*
- **Separator**: You can add a separator 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

Customizing refund settings [Classic]

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).

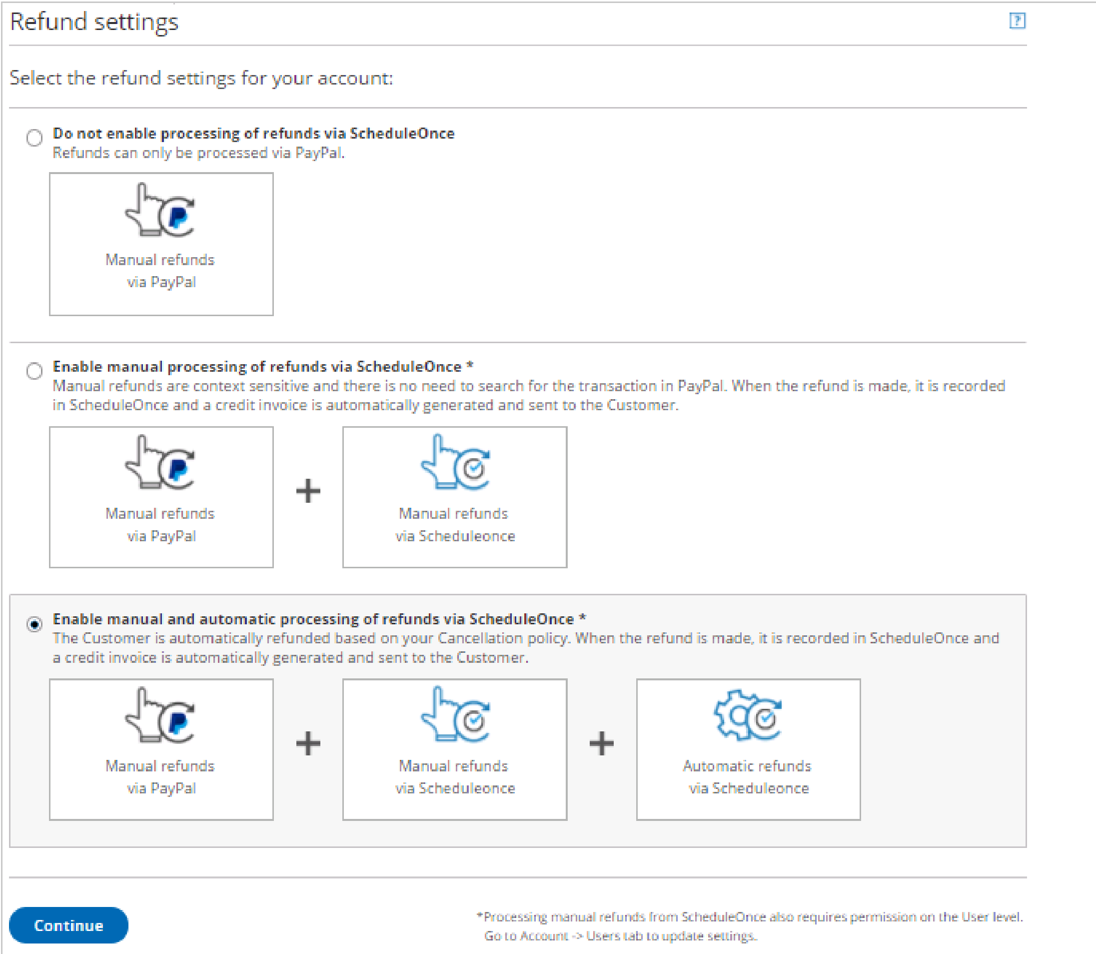


Figure 1: Refund settings

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

Automatic refunds via OnceHub [Classic]

> **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

Manual refunds via OnceHub [Classic]

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).

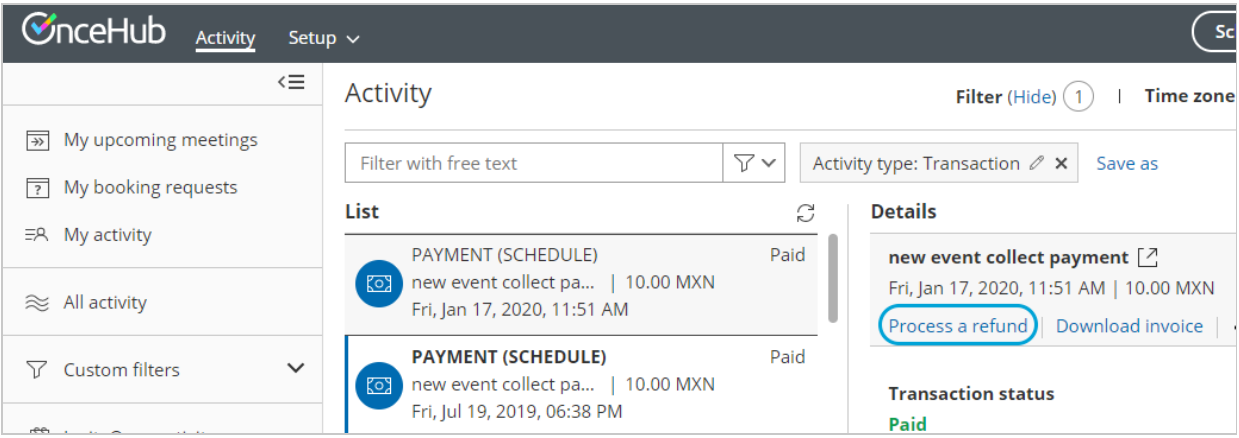


Figure 1: Issuing a manual refund

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.

Conflicting settings [Classic]

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.

Disconnecting OnceHub from PayPal [Classic]

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.

Salesforce integration [Classic]

Our Salesforce integration enables complete scheduling integration through all phases of the customer lifecycle.

You do not need an assigned product license to install and update Salesforce account settings, though you do need to be an administrator. Learn more

Note:

The integration is available to Salesforce plans at Professional level or higher, so long as they include API access. Please note Professional Salesforce plans may need to purchase API access from their Salesforce account executive, separate from their plan. Learn more

Setting up the Salesforce integration

Before you can begin sending your booking data to Salesforce, you must set up the connector. This first step of the setup process is connecting the API User. The API User in Salesforce ensures that all API calls between OnceHub and Salesforce have the required permissions.

Once you have connected to Salesforce using the API User, you can install the OnceHub connector for Salesforce.

Note:

You can test the OnceHub connector for Salesforce with a Salesforce Sandbox environment. The setup will be kept when you switch back to your production environment.

To test the connector in your Sandbox environment, connect OnceHub to an API User created in your Salesforce Sandbox environment and complete the connector setup. Then disconnect and connect to an API User created in your production environment. Learn more about connecting to a Salesforce Sandbox environment

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, the API User you create must be granted the appropriate permissions. This is done by assigning the OnceHub permission set.

Salesforce Activity Events

When a booking is made, a Salesforce Activity Event is always created and related to a Salesforce Lead, Contact, Person Account, or Case record. 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** (which indicates the current phase of the booking in the booking lifecycle) and the **Cancel/reschedule reason** fields are provided with the OnceHub connector for Salesforce and are mapped to OnceHub data. You can track the **Event Status** and the **Cancel/reschedule reason** by adding these fields to the Activity Event layout.

Configuring the connector

There are two types of mapping which must be created between OnceHub and Salesforce:

- Universally required Salesforce fields: Universally required fields that do not have a default value in Salesforce must receive a value for an object to be created. For example, if **Company** is a universally required field for a Lead record, the record cannot be created via the Salesforce API unless a value is provided for the **Company** field. If it has not been mapped in the field validation step, OnceHub will pass a default value to this field.
- Non-mandatory Salesforce fields: Non-mandatory fields can contain additional Customer data and booking data, some of which is mapped to non-mandatory Salesforce fields by default. You can use these to pass any other optional data to Salesforce.

> **Note :**
>
> There are some restrictions on the type of data which can be passed between OnceHub and Salesforce. See Supported and non-supported field types in the Salesforce integration for full details.

After configuring the field validation mapping and field mapping, you must define your creation rules. Here you can specify what happens when a new Lead, Contact, Person Account, or Case is created from a booking or when it is updated.

For example, you can decide whether a booking should override an existing Salesforce Lead or update it and who it should be assigned to.

Using the Salesforce integration

After you've completed the connector setup process, you'll need to connect your OnceHub User account to Salesforce in order to use the Salesforce integration. Each User connects to their own personal Salesforce Account. If you're an Administrator, you can also make changes to the connector setup after connecting to your Salesforce Account.

In the **Salesforce settings** section of your Booking page, you can map Salesforce Record Types to the Lead, Contact, Account, Event, and Case records, add an Event to the Salesforce calendar, and select which type of records should be created when you use General links.

Learn more about configuring Salesforce connector settings on your Booking page

When scheduling with existing Salesforce Leads, Contacts, Person Account, or Case records, you can either use our Personalized links (Salesforce ID) for your Salesforce email templates or Salesforce emails, use Salesforce scheduling buttons, or use the Salesforce Record ID to identify Customers during the booking process.

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.

Salesforce integration security [Classic]

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 IDs to Identify Customers during booking [Classic]

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

Prepopulate or skip the Booking form step in Salesforce integration [Classic]

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.

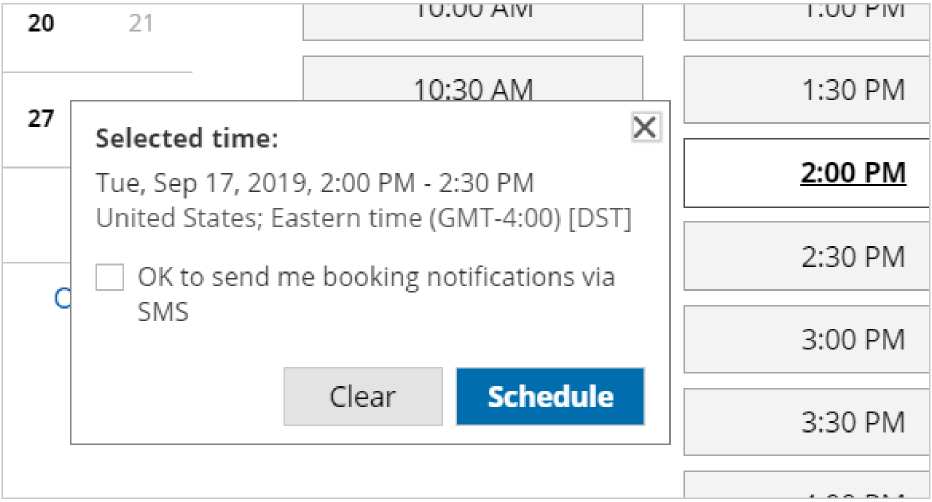


Figure 1: SMS notification opt-in

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) [Classic]

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:

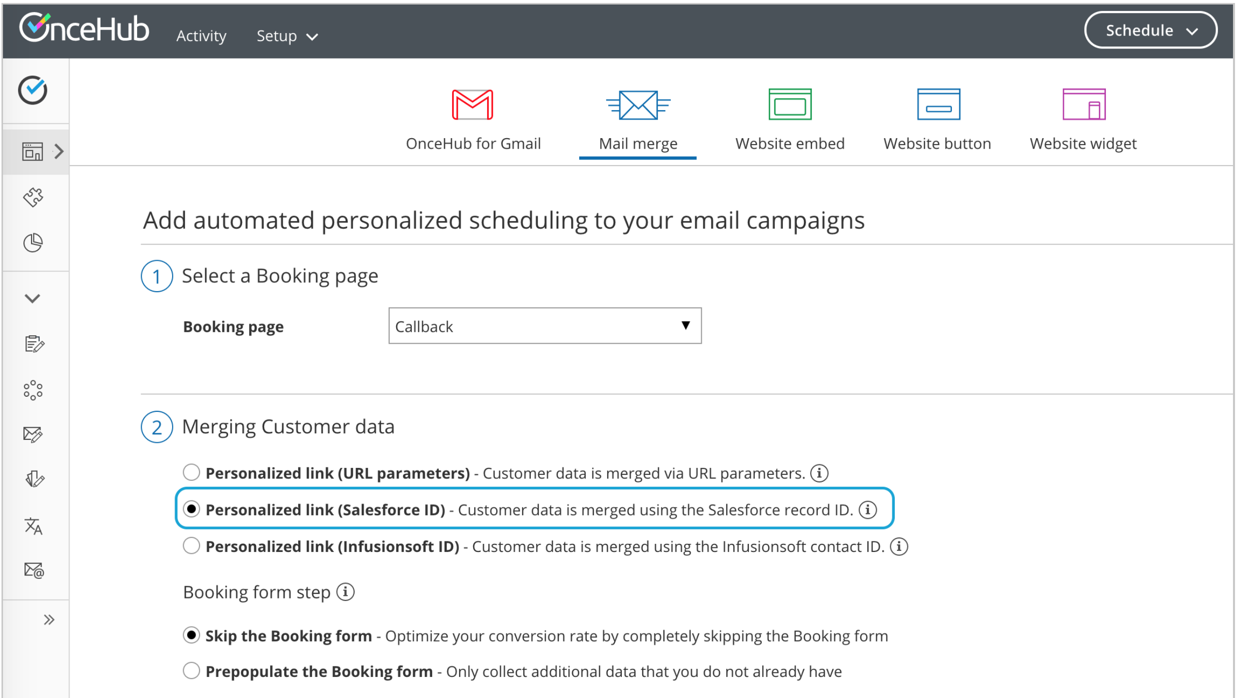
For security and privacy reasons, using CRM record IDs to skip or prepopulate the Booking form is not compatible with collecting data from an embedded Booking page or redirecting booking confirmation data.

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 [Classic]

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.

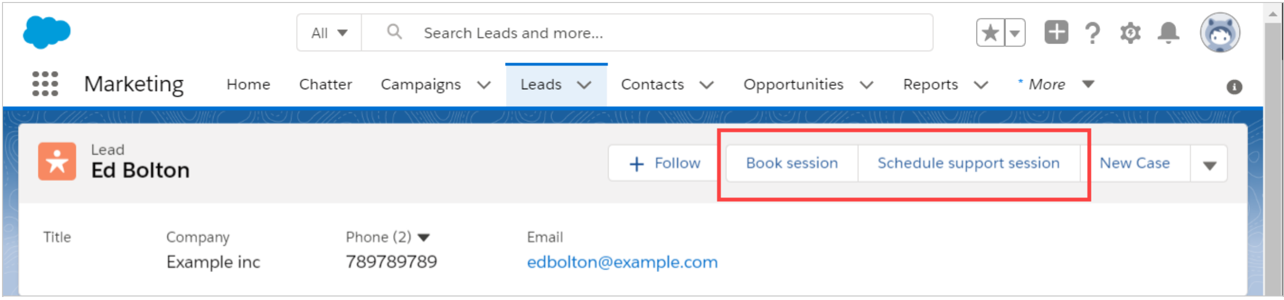


Figure 1: Salesforce scheduling buttons

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 [Classic]

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.

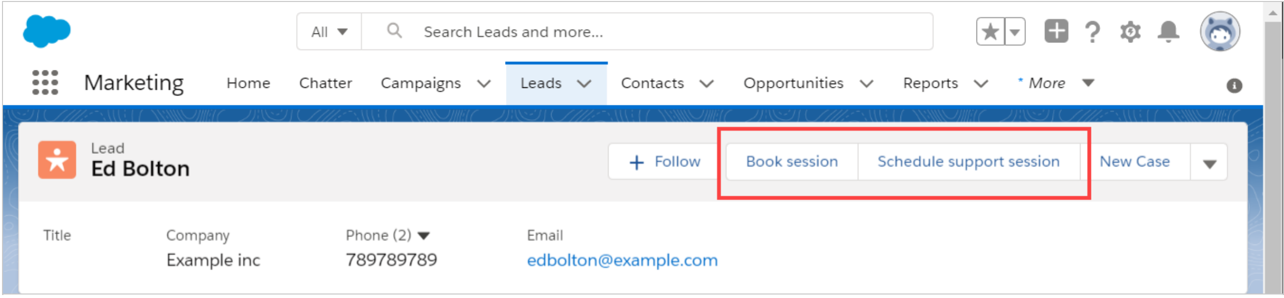


Figure 1: Salesforce scheduling buttons

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).

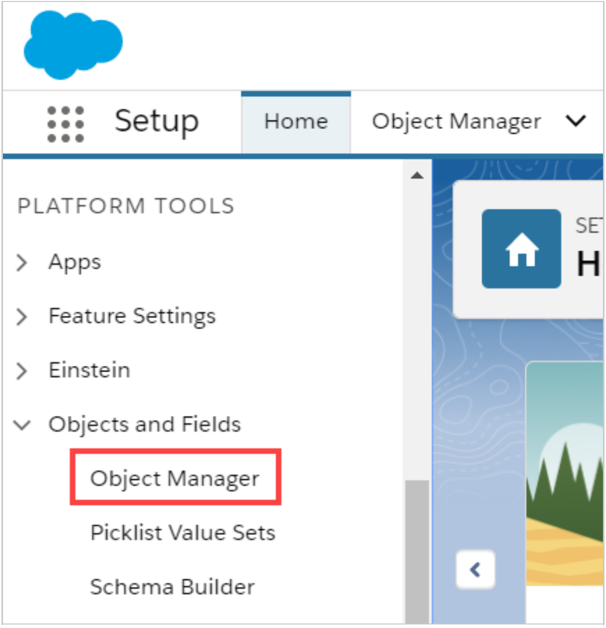


Figure 2: Object Manager in the Objects and Fields menu

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).

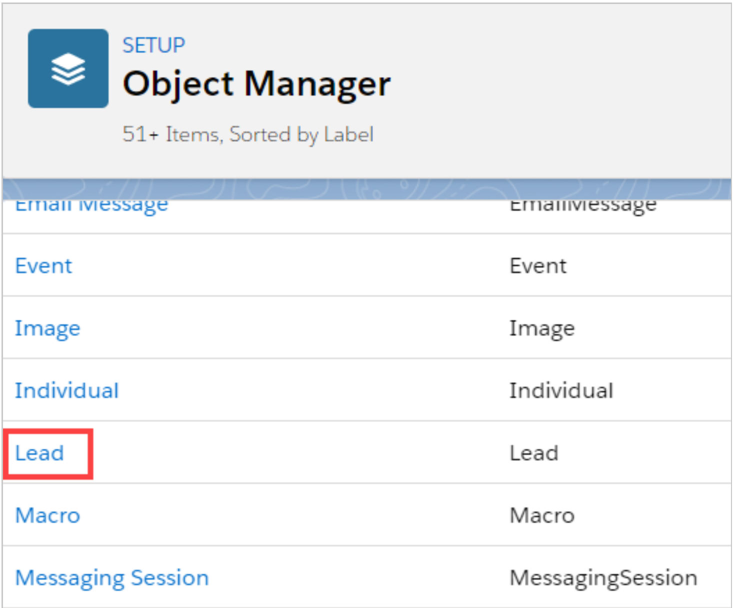


Figure 3: Lead in the Object Manager list

5. Select **Buttons, Links, and Actions -> New Button or Link** (Figure 4).

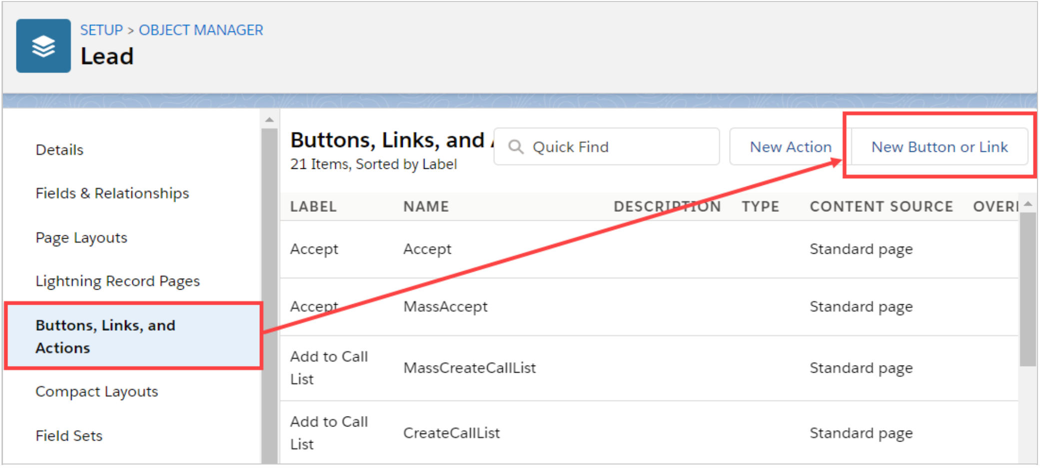


Figure 4: New Button or Link

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**.

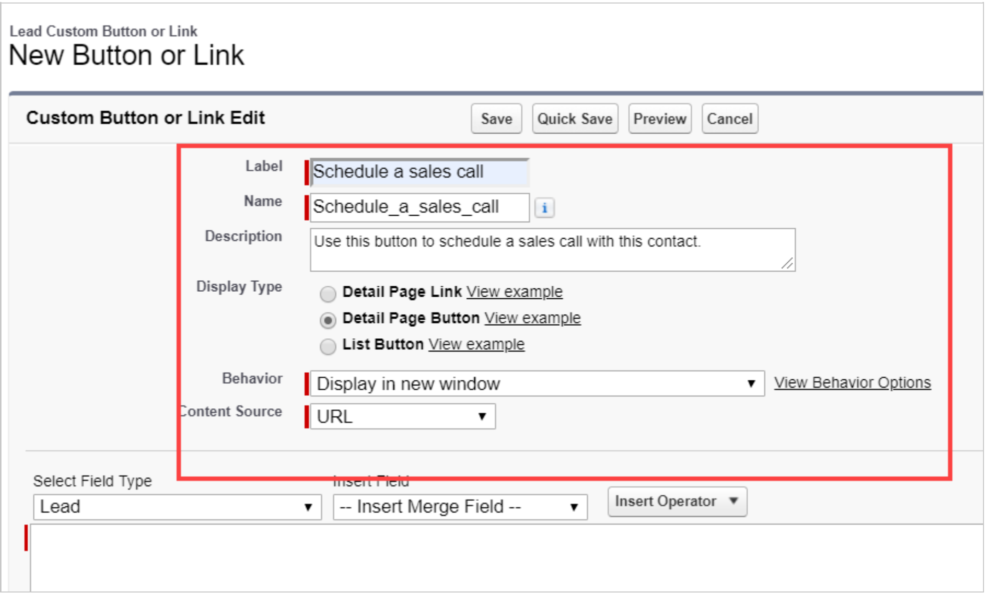


Figure 5: New Button or Link pane

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}

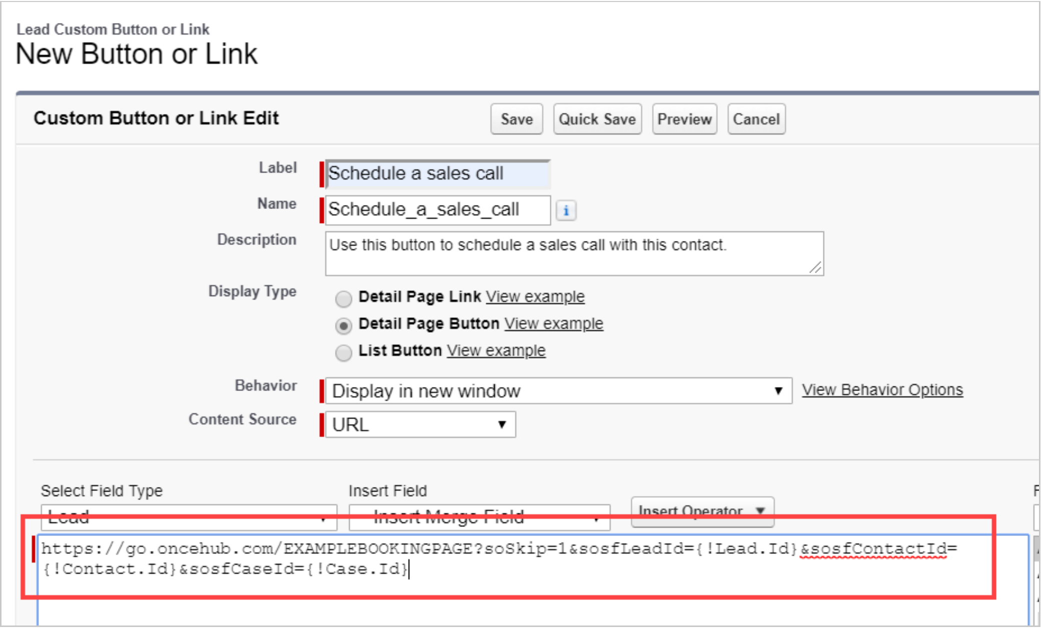


Figure 6: Paste link in the large text box

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.

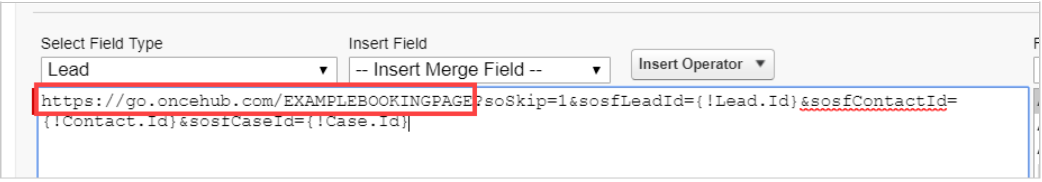


Figure 7: Placeholder URL text

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).

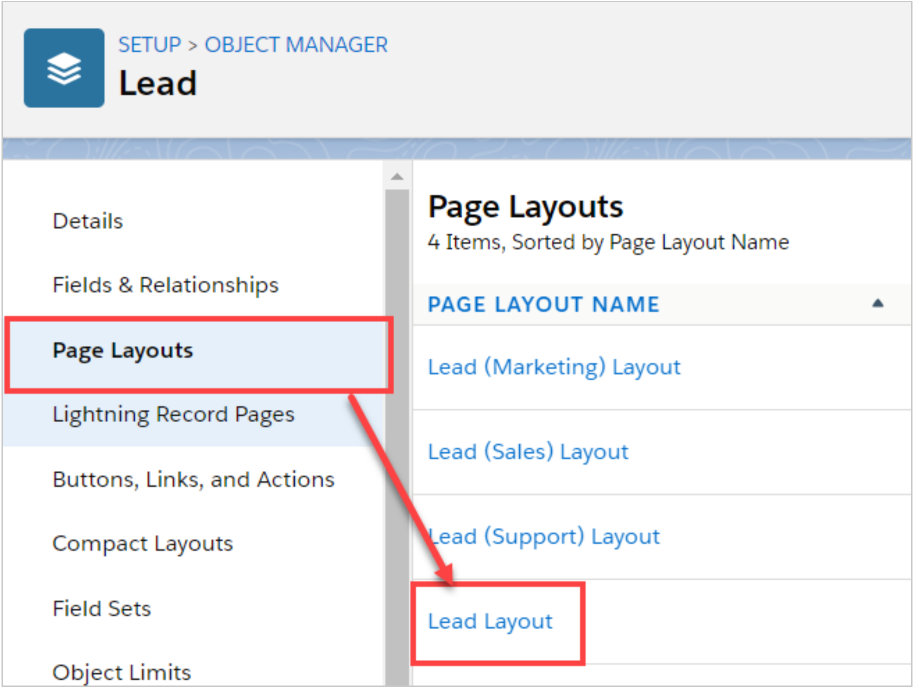


Figure 8: Page Layouts

2. In the Lead Layout editor, select **Mobile & Lightning Actions** (Figure 9).

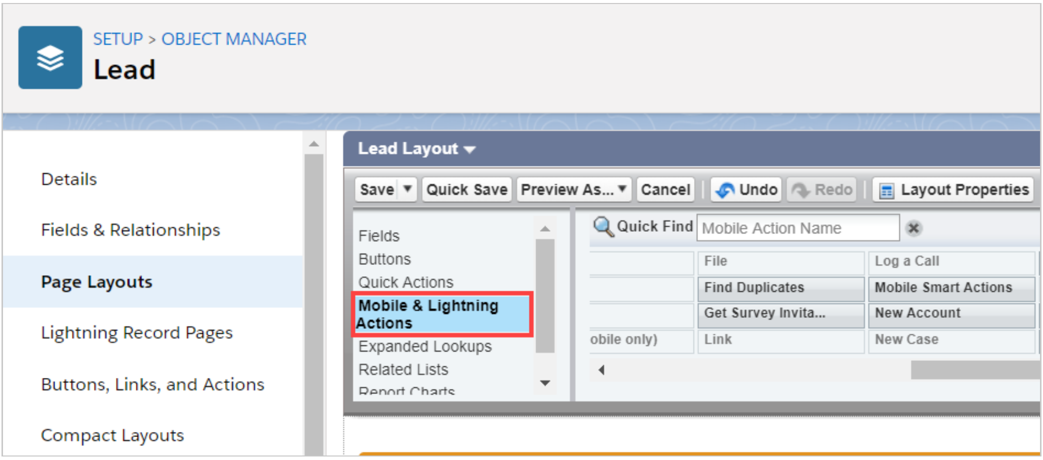


Figure 9: Mobile and Lightning Actions

3. Click and drag the button that you want to add to the **Salesforce Mobile and Lightning Experience Actions** section (Figure 10).

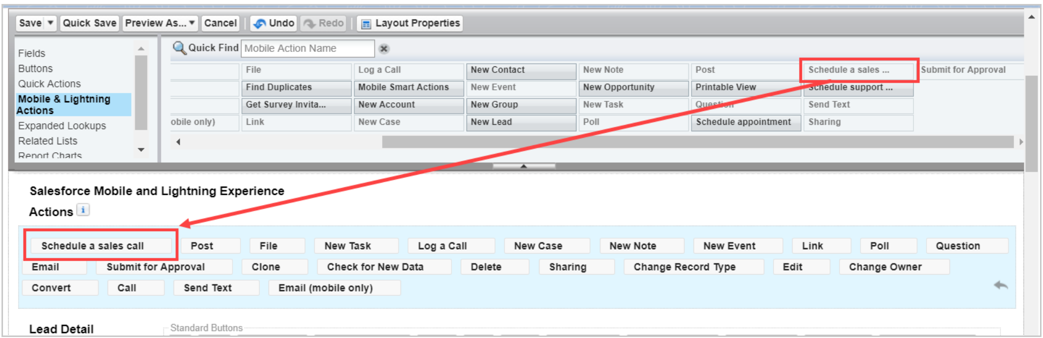


Figure 10: Add button to Salesforce Mobile and Lightning Experience Actions section

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 [Classic]

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).

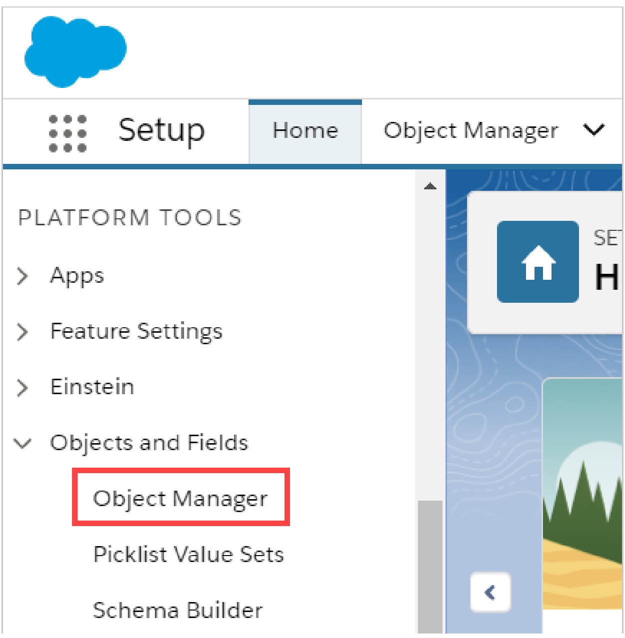


Figure 1: Object Manager in the Objects and Fields menu

4. In the **Object Manager** list, select the **Account** object (Figure 2).

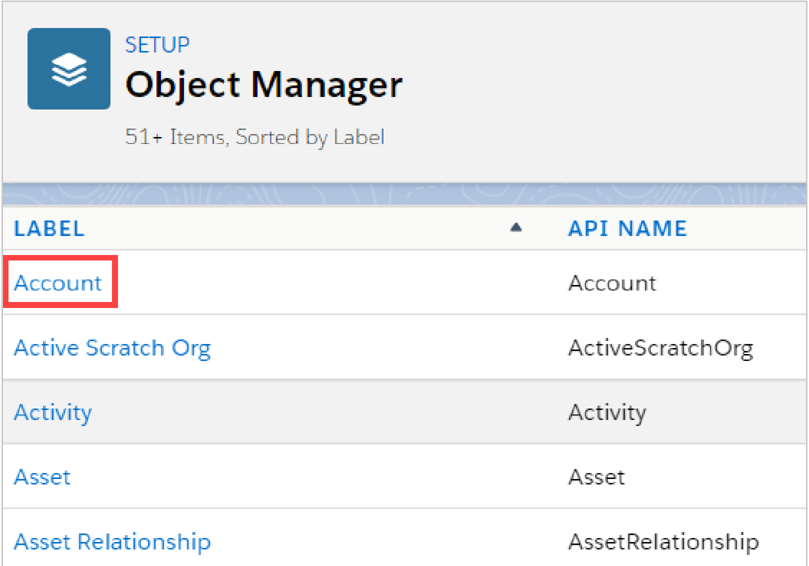


Figure 2: Account object in the Object Manager list

5. Select **Field & Relationships -> New** (Figure 3).

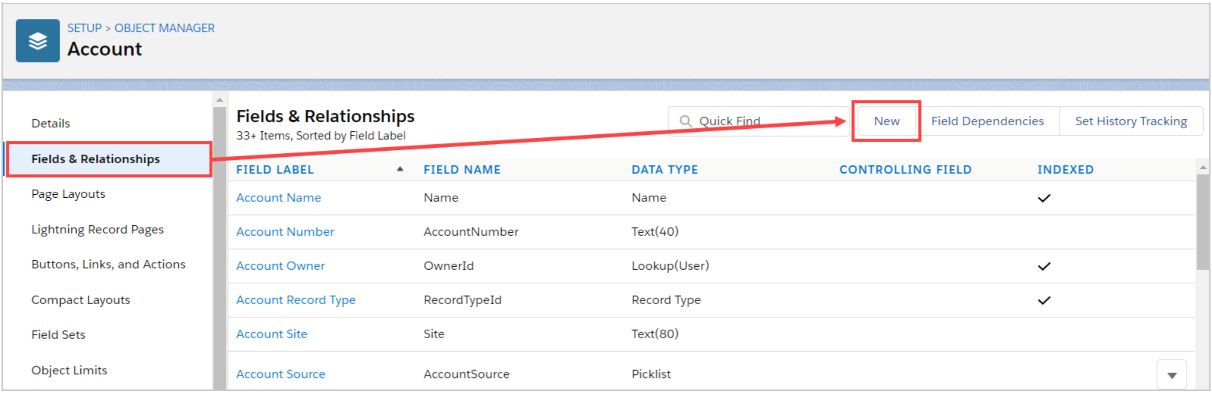


Figure 3: Fields & Relationships

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**

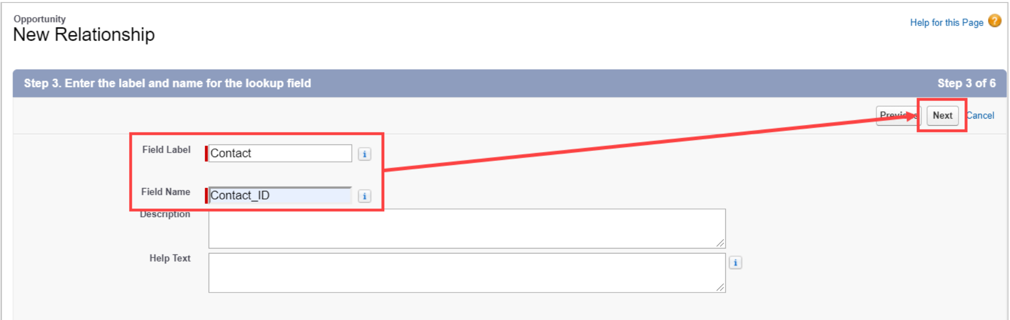


Figure 5: New Relationship

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).

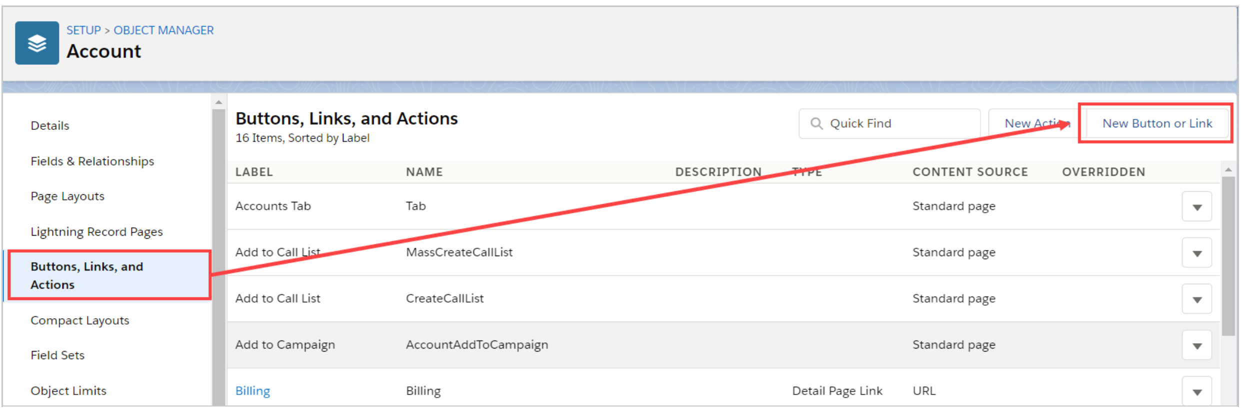


Figure 6: New Button or Link

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}

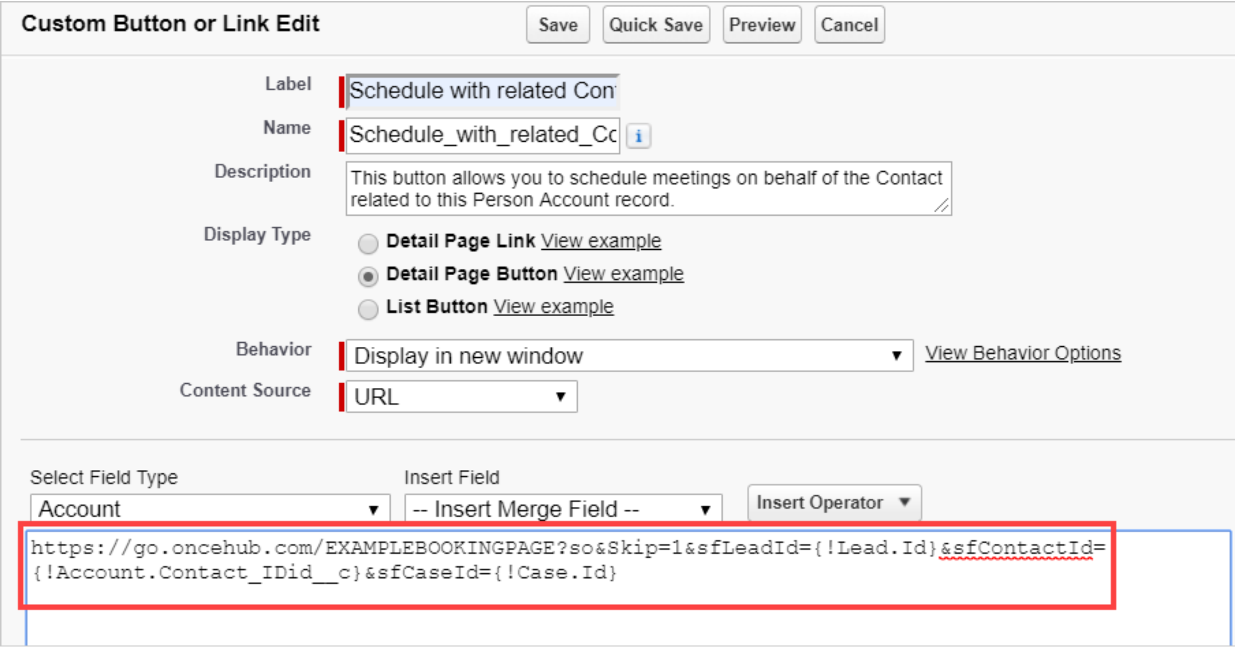


Figure 7: Paste link in the large text box

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.

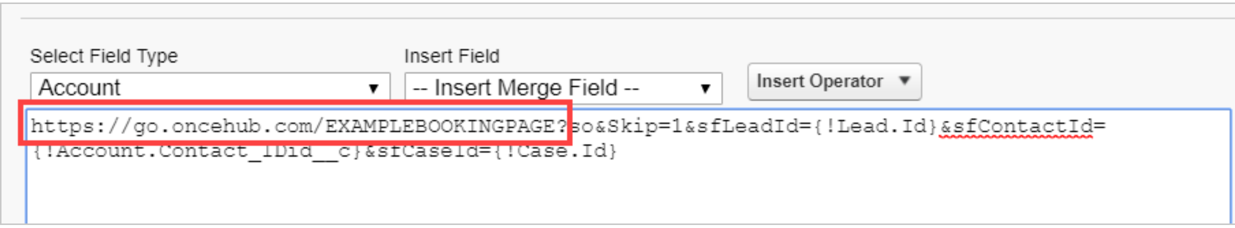


Figure 8: Placeholder URL text

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 [Classic]

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.

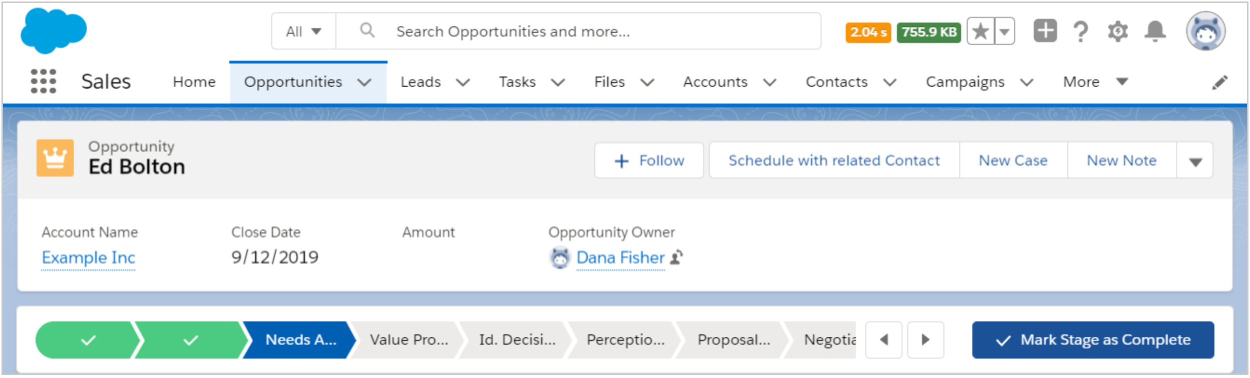


Figure 1: Schedule with related Contact button

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).

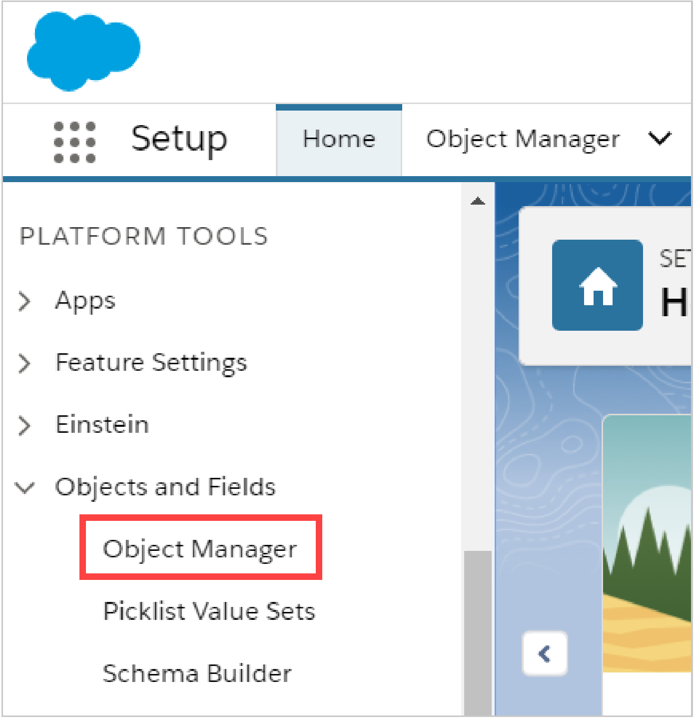


Figure 2: Object Manager in the Objects and Fields menu

4. In the **Object Manager** list, select the **Opportunity** object (Figure 3).

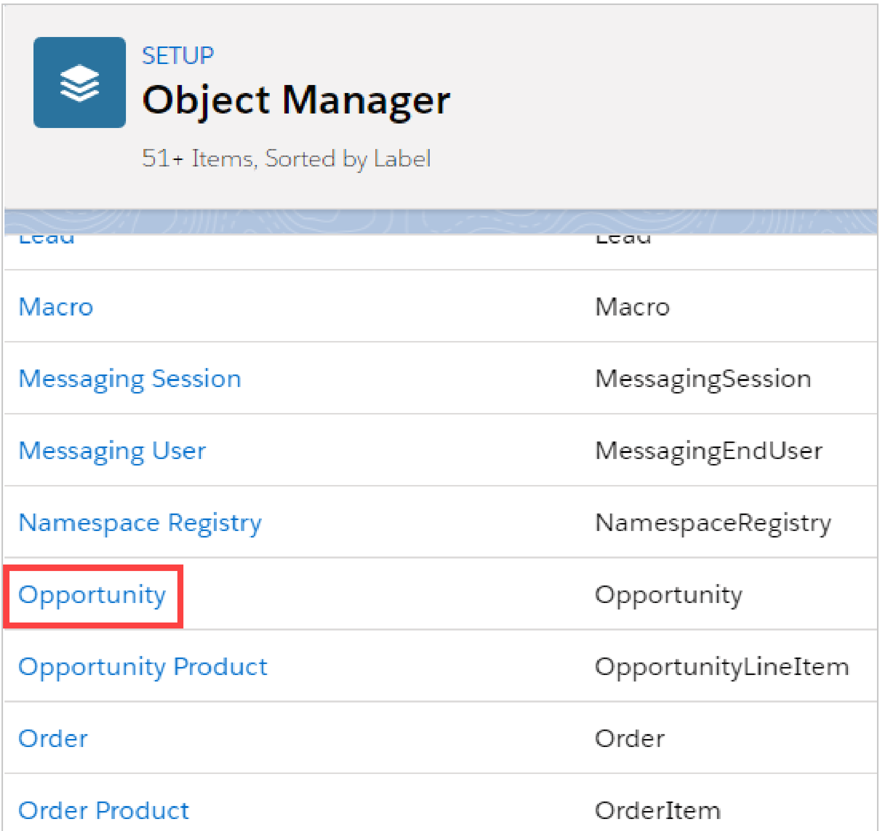


Figure 3: Opportunity in the Object Manager list

5. Select **Field & Relationships -> New** (Figure 4).

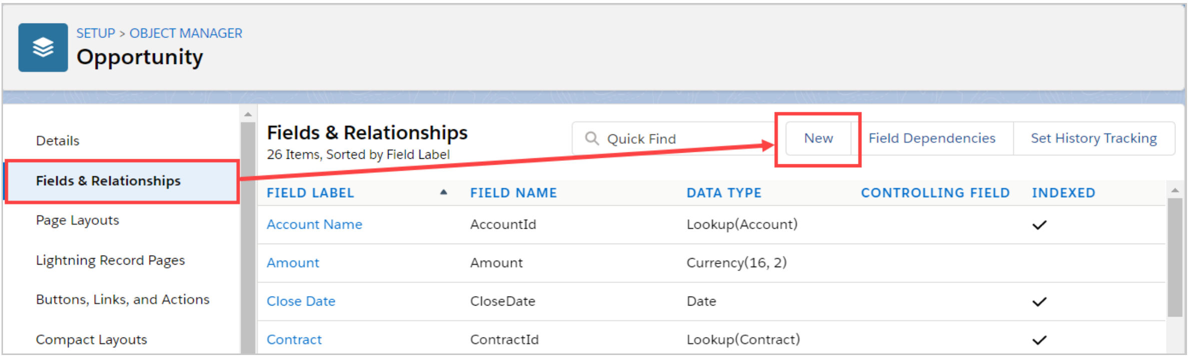


Figure 4: Fields & Relationships

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**

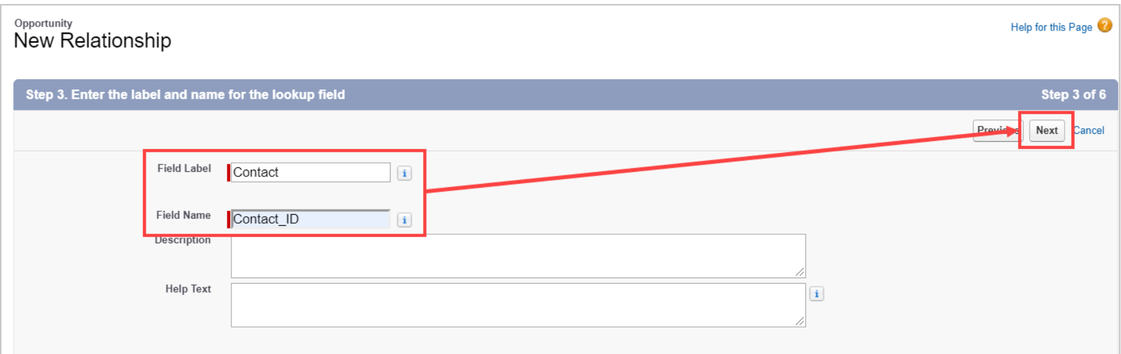


Figure 6: New Relationship

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).

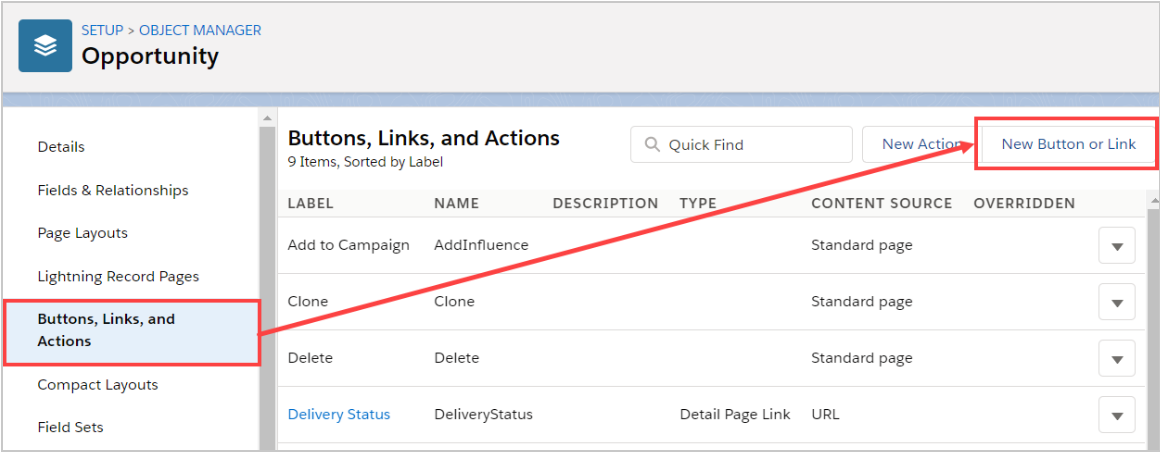


Figure 7: New Button or Link

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}
```

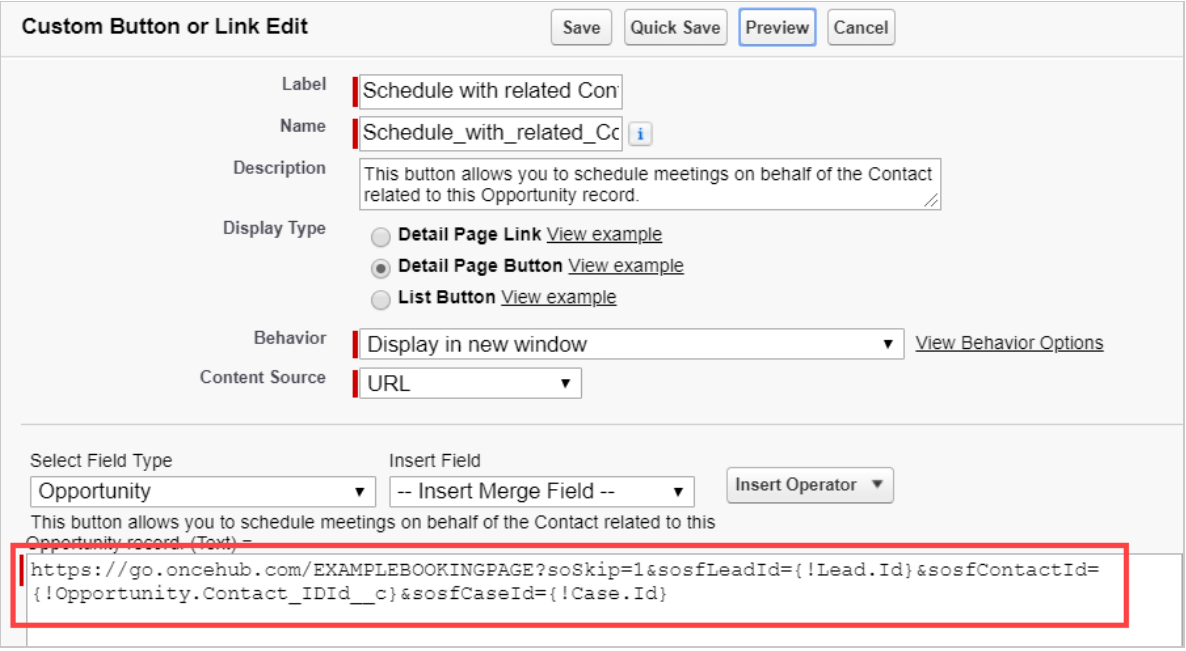


Figure 8: Paste link in the large text box

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).

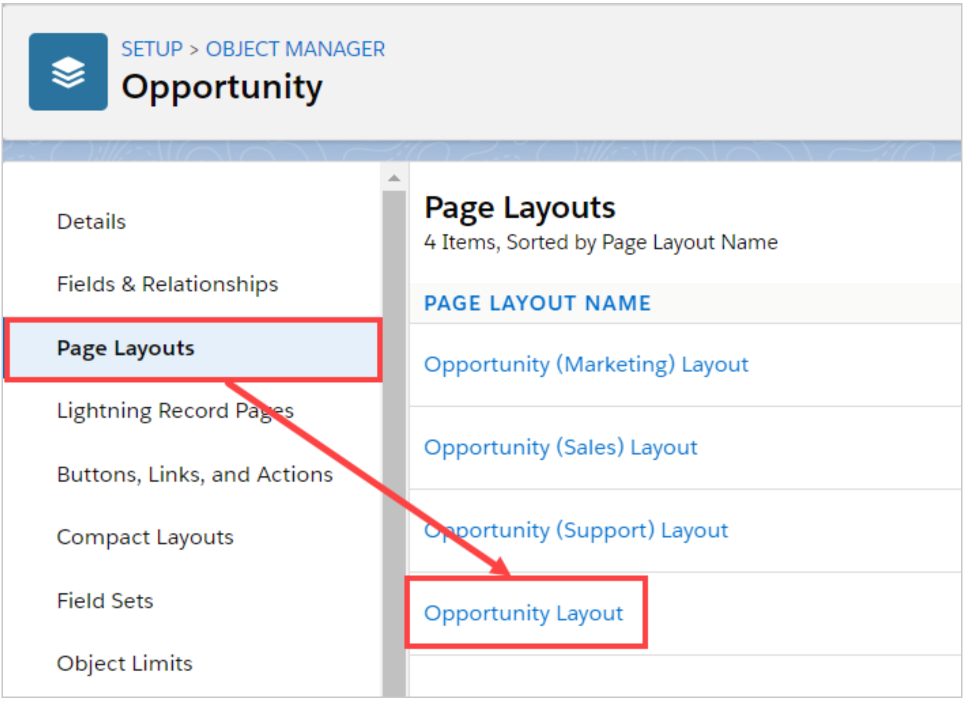


Figure 10: Page Layouts

2. In the Opportunity Layout editor, select **Mobile & Lightning Actions** (Figure 11).

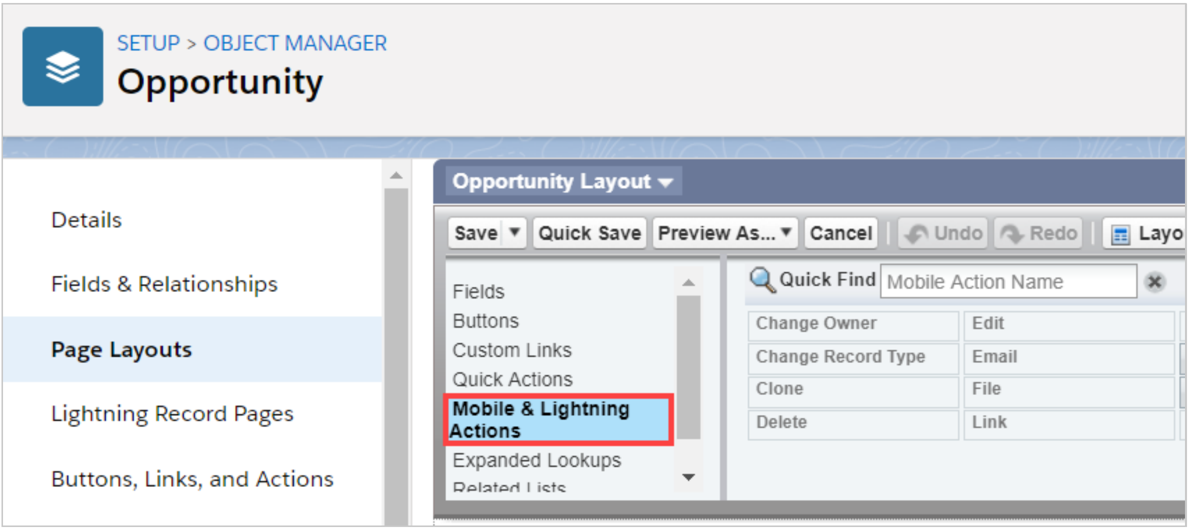


Figure 11: Mobile & Lightning Actions

3. Click and drag the **Schedule with related Contact** button to the **Salesforce Mobile and Lightning Experience Actions** section (Figure 12).

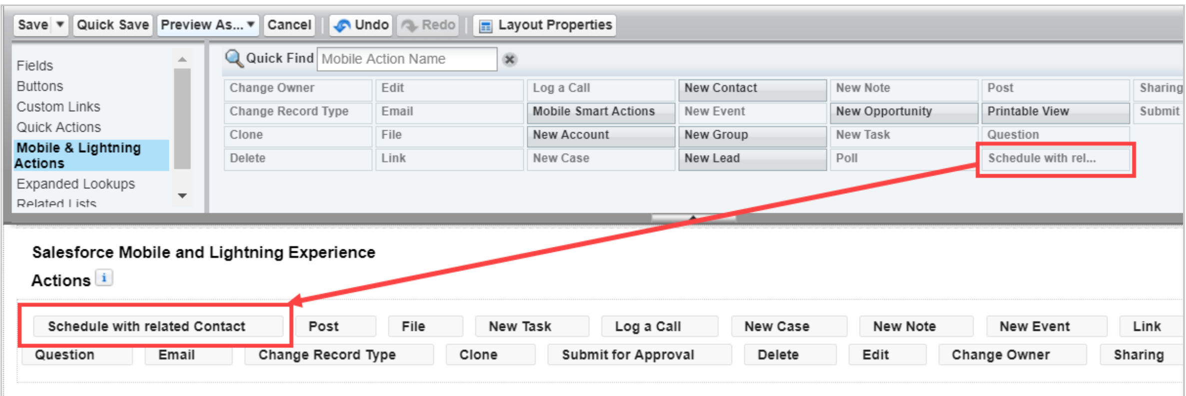


Figure 12: Add button to Salesforce Mobile and Lightning Experience Actions section

4. Click **Save**.

You're all set! Your button is now ready to use on your Opportunity pages.

Personalizing scheduling on landing pages with Salesforce IDs [Classic]

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.

Maximizing booking rates in Salesforce Campaigns [Classic]

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).

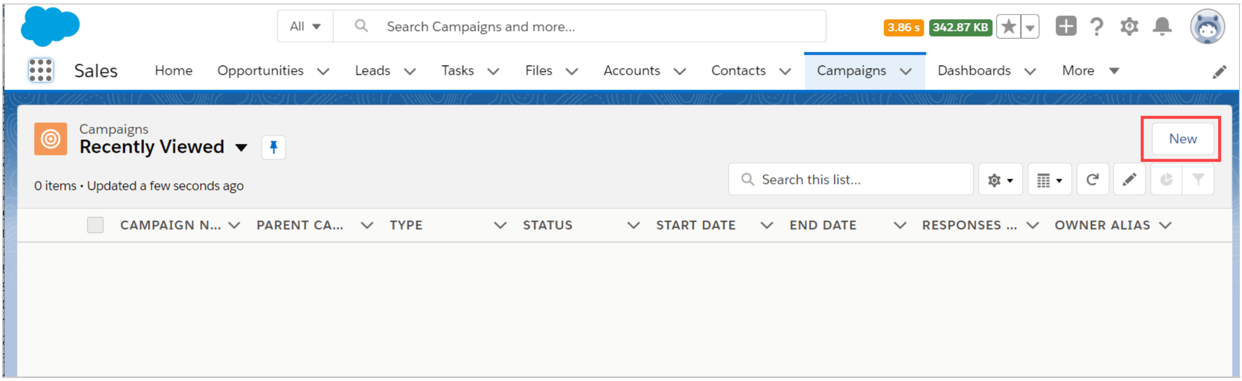


Figure 1: Create a new Campaign

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).

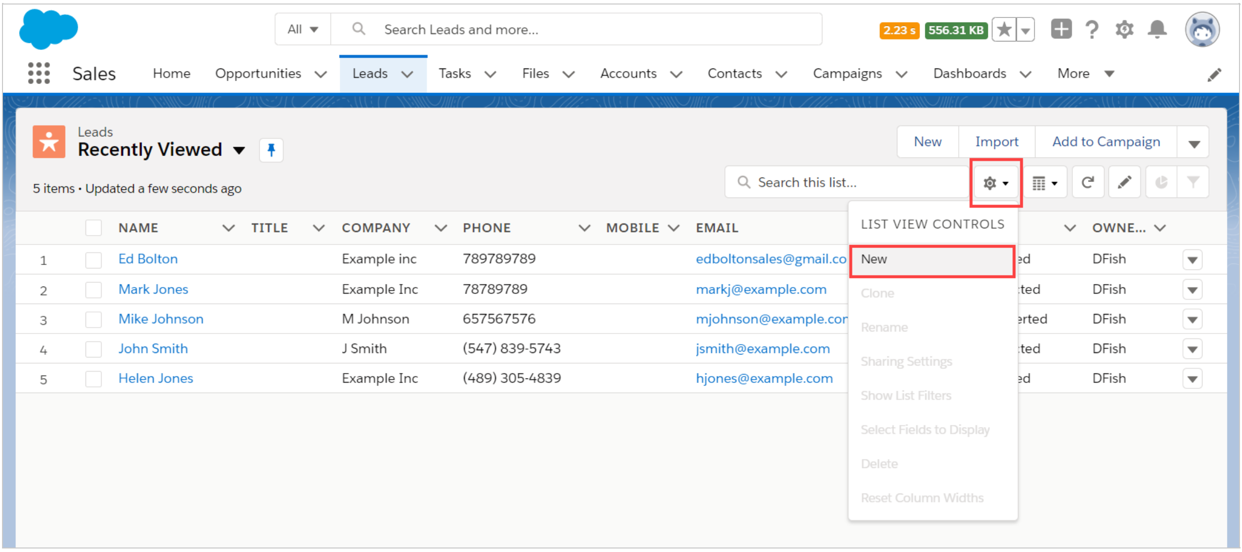


Figure 2: List View Controls

10. In the **New List View** pop-up, give the list a name and select who can view this list (Figure 3).

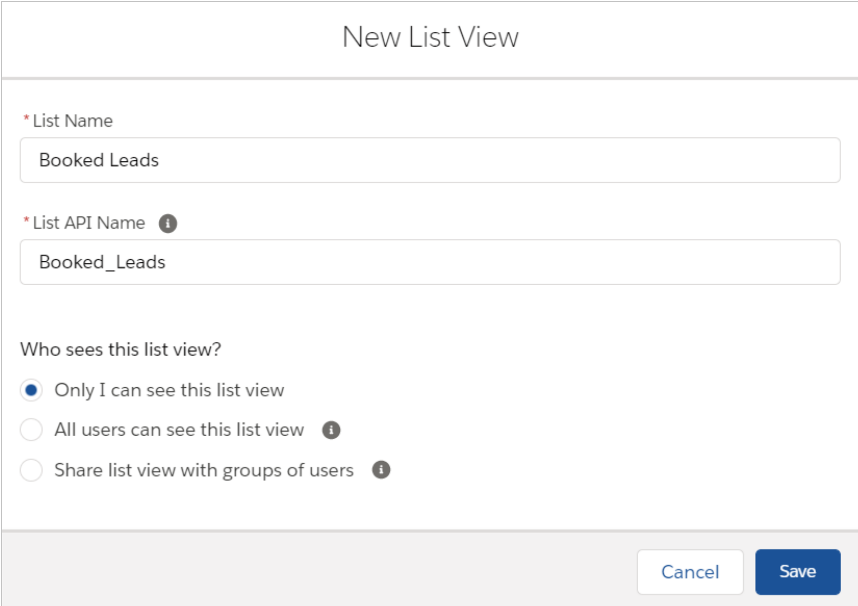


Figure 3: New List View pop-up

11. In the **Filters** sidebar, click **Add Filter** (Figure 4).

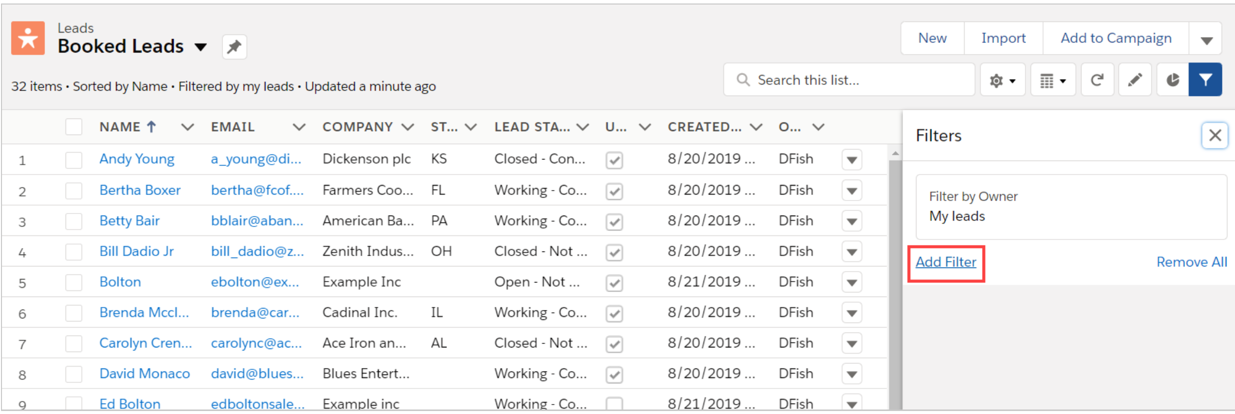


Figure 4: Add Filter

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**.

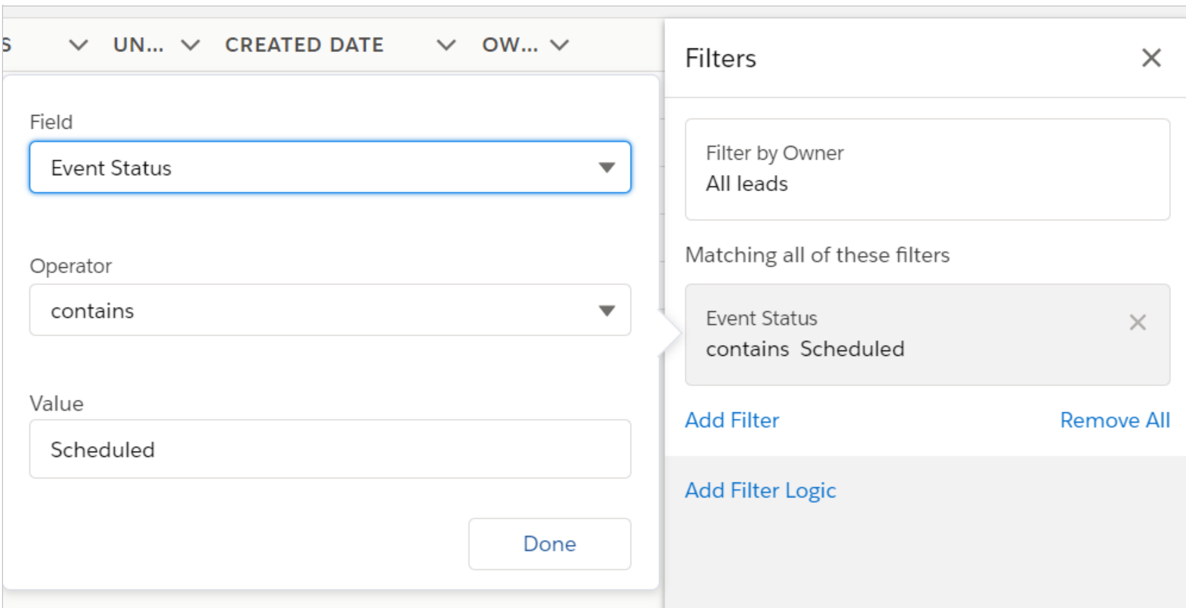


Figure 5: Event Status contains Scheduled

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).

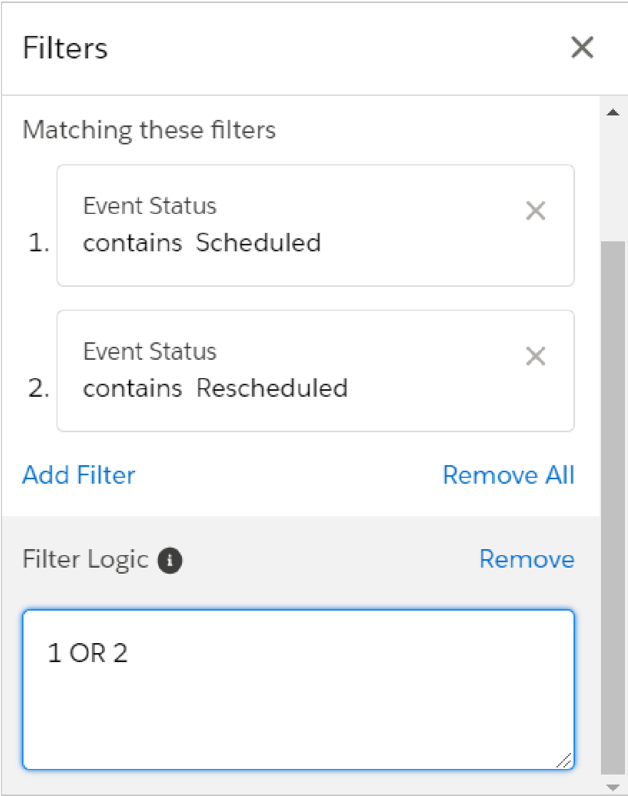


Figure 6: Edit Filter Logic

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.

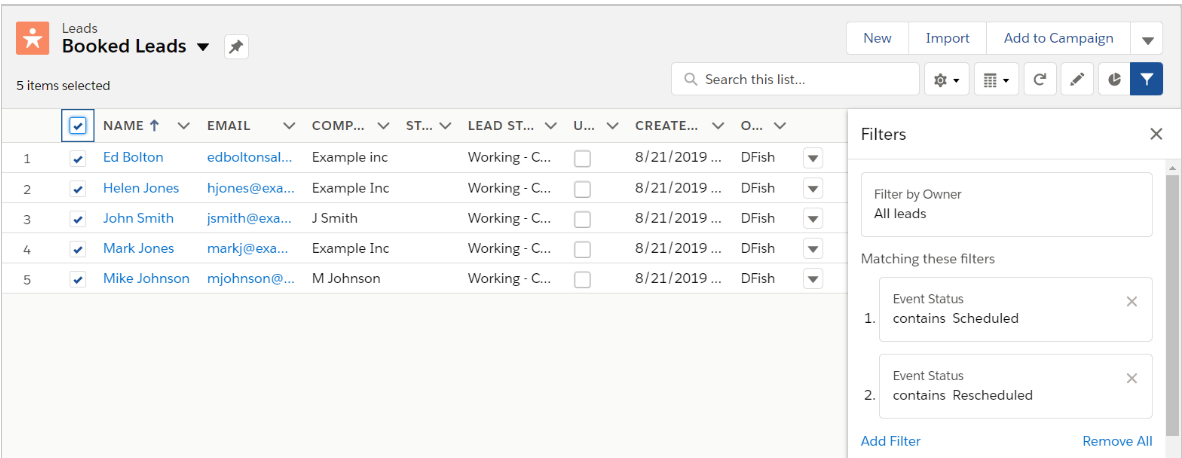


Figure 7: Select Members

20. In the **Add to Campaign** pop-up, select the campaign you created (Figure 8).

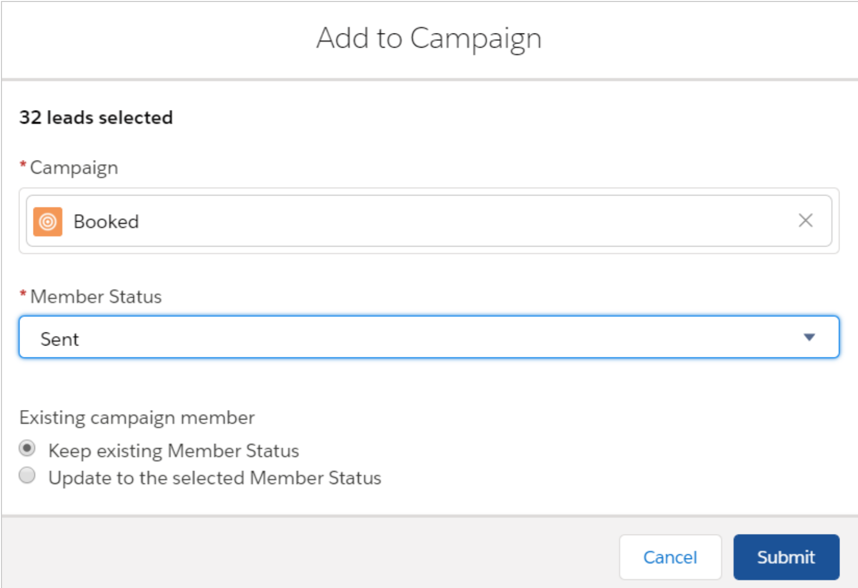


Figure 7: Add to Campaign pop-up

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).

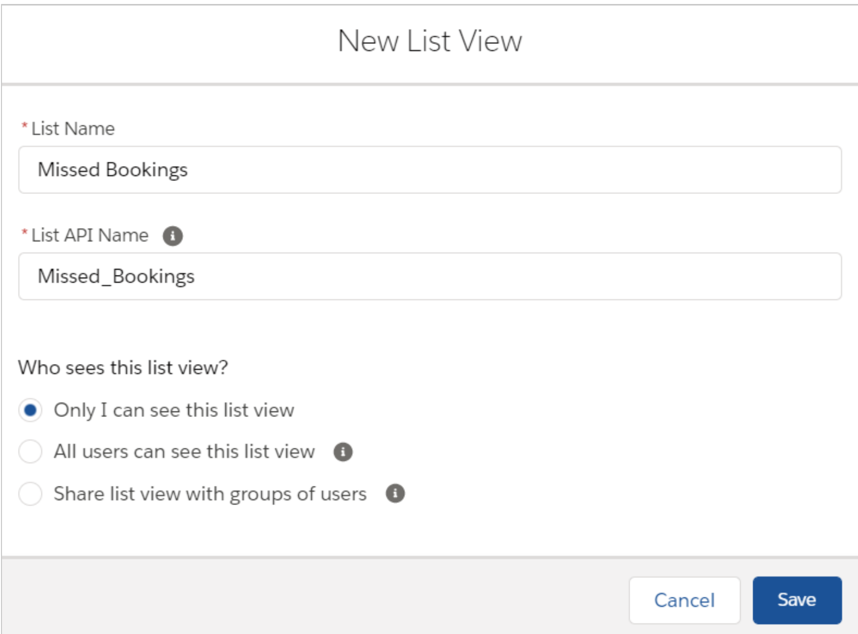


Figure 8: New List View pop-up

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**.

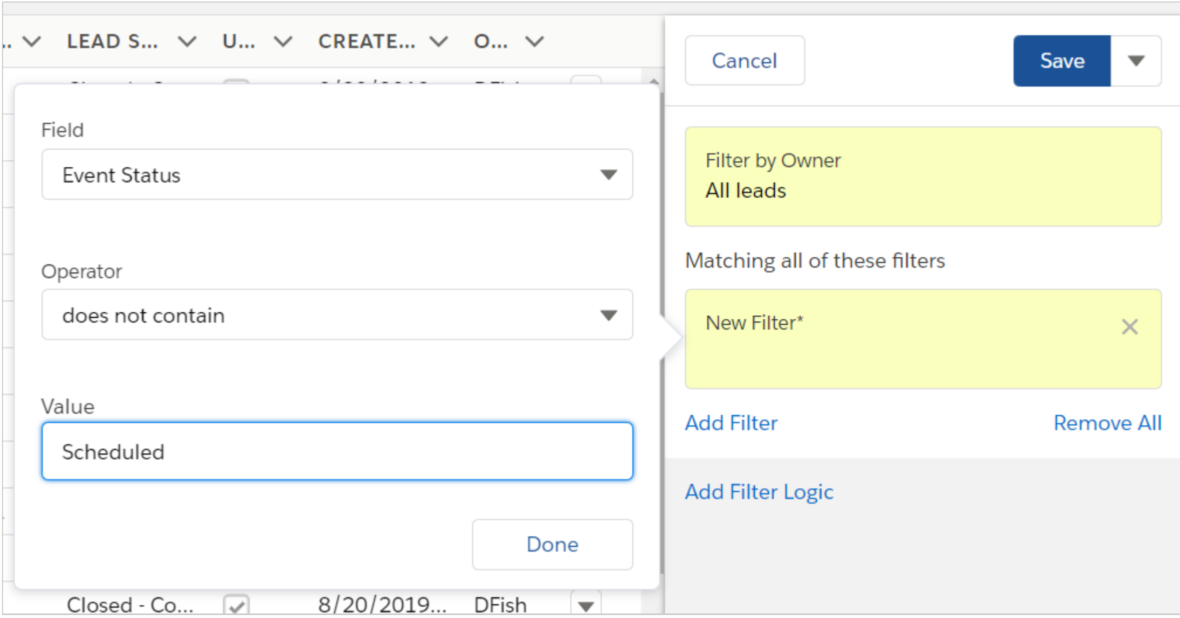


Figure 9: Event Status does not contain Scheduled

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.

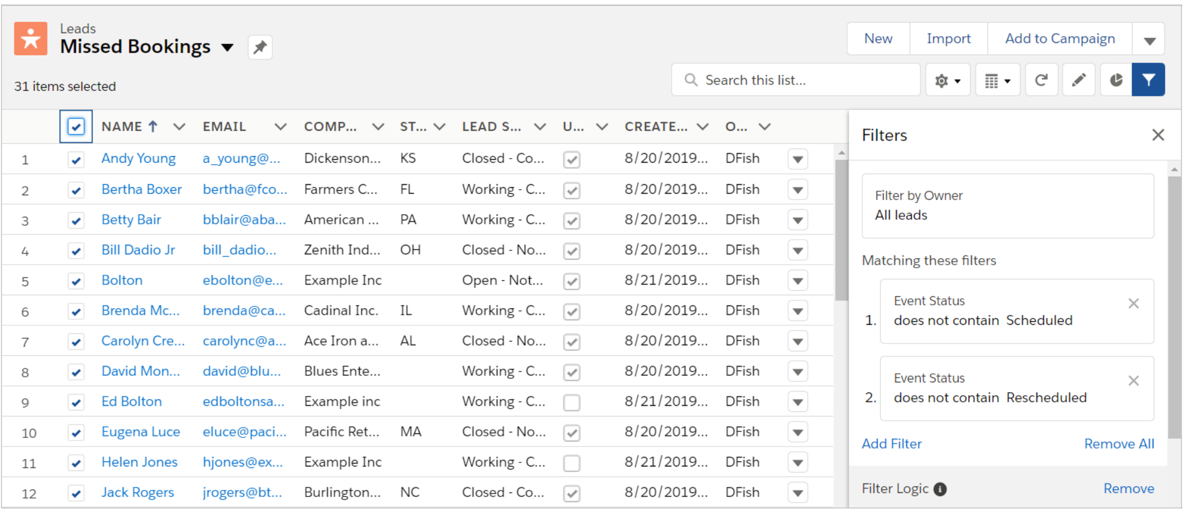


Figure 10: Select Members

20. In the **Add to Campaign** pop-up, select the campaign you created (Figure 11).

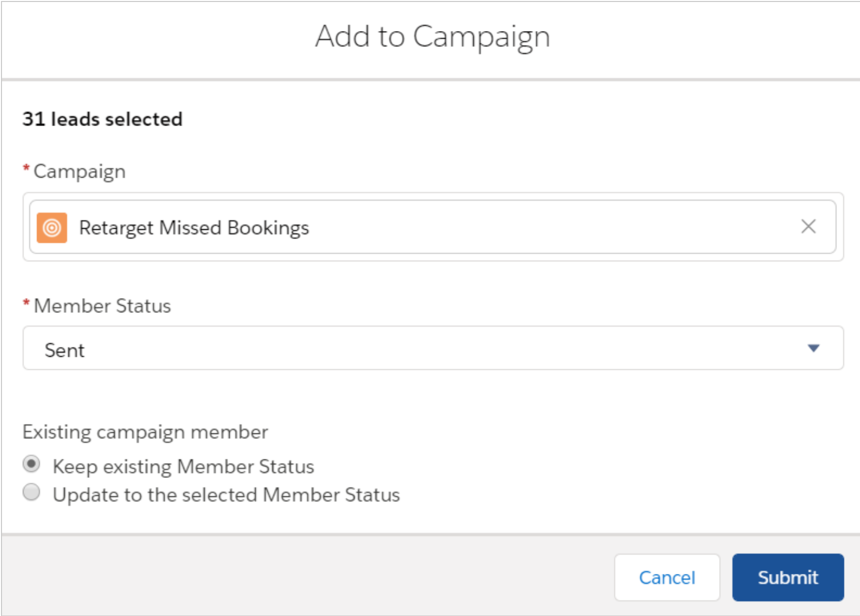


Figure 11: Add to Campaign pop-up

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 [Classic]

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. Click on the gear icon in the top right.
2. Select **CRM** from the dropdown.
3. Click on the tile for **Booking Pages and Master Pages**.
4. In 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.

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 connector settings on a Booking page [Classic]

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).

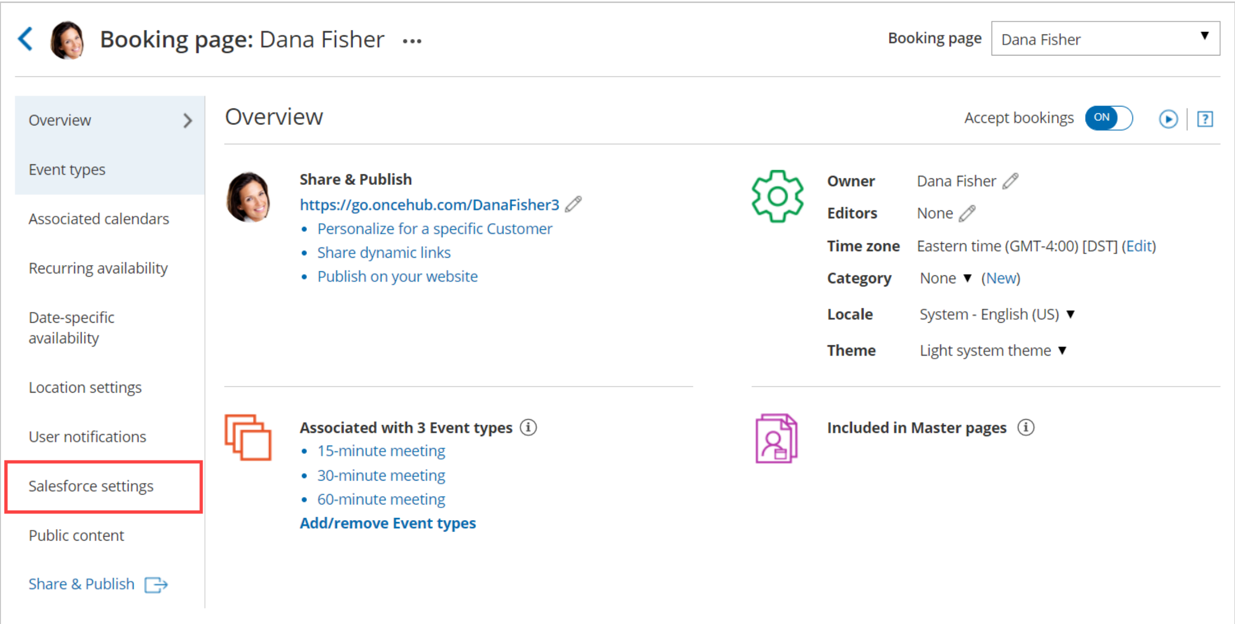


Figure 1: Salesforce settings on a Booking page

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.

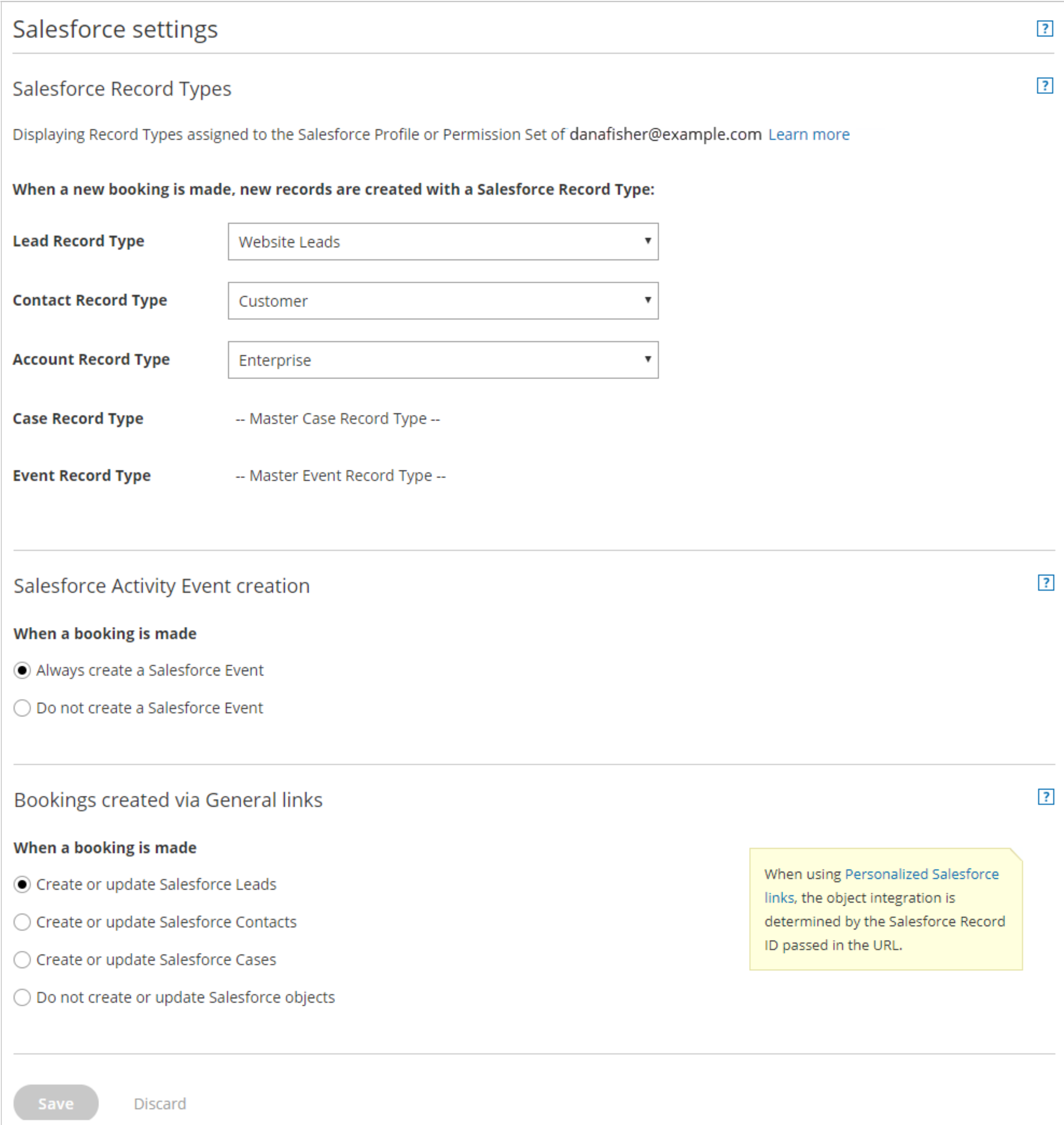


Figure 2: Salesforce settings

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 [Classic]

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 [Classic]

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

Connecting a Salesforce API User [Classic]

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).

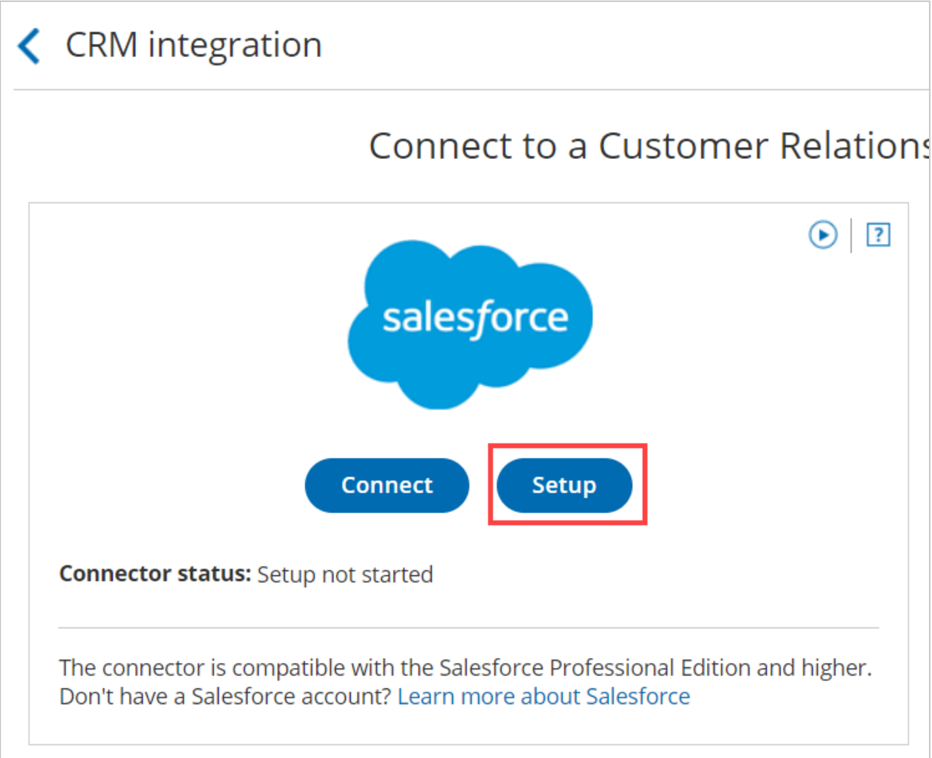


Figure 1: Set up API Connection in OnceHub

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).

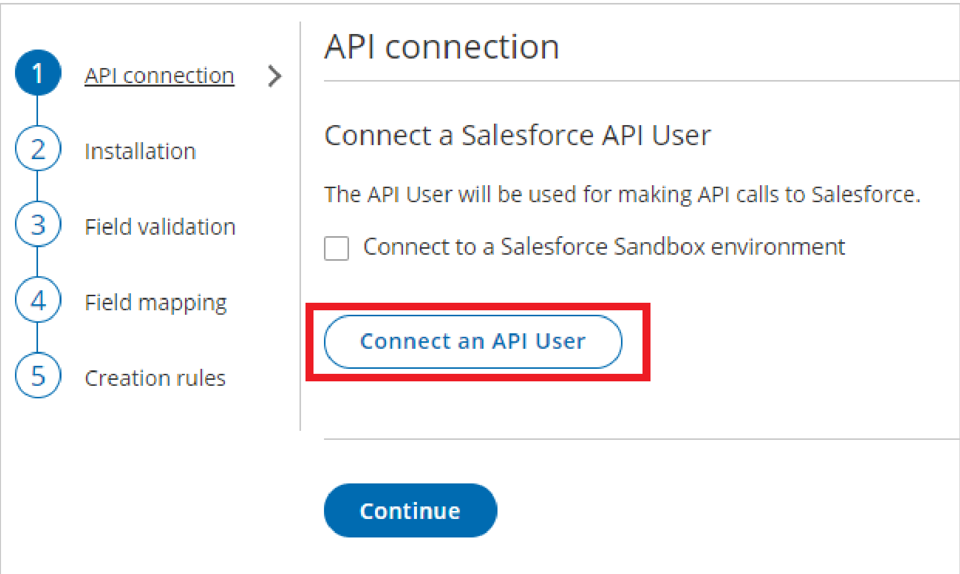


Figure 2: Connect an API User

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).

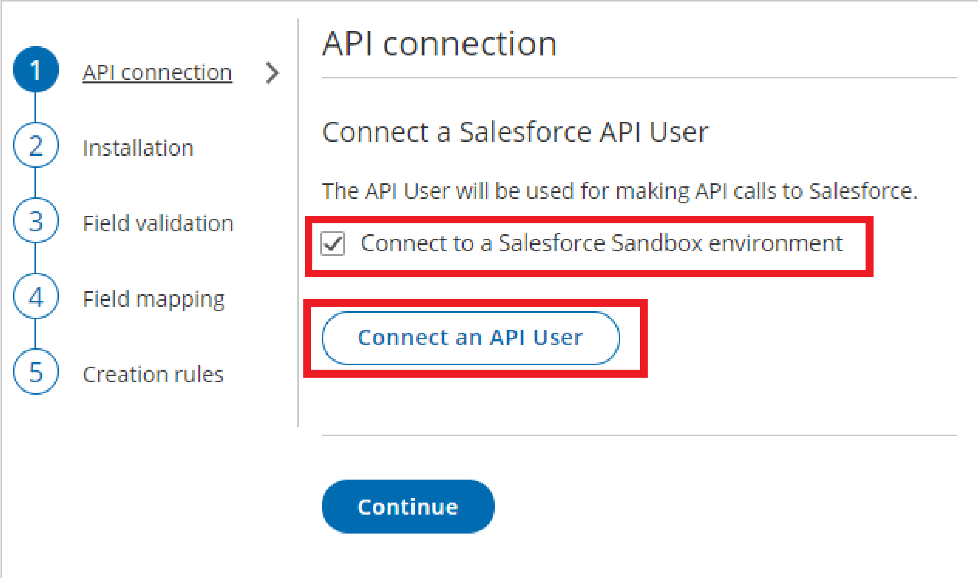


Figure 3. Connect to a Salesforce Sandbox environment

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).

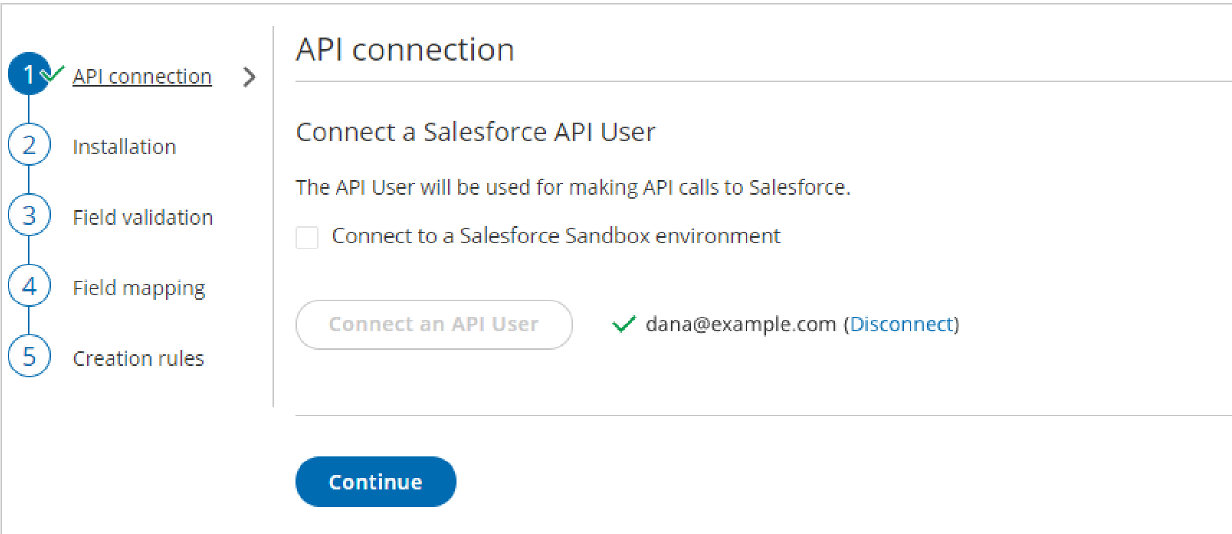


Figure 5: API User is connected

8. Click **Continue** to begin the installation.

Connecting to a Salesforce Sandbox environment [Classic]

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).

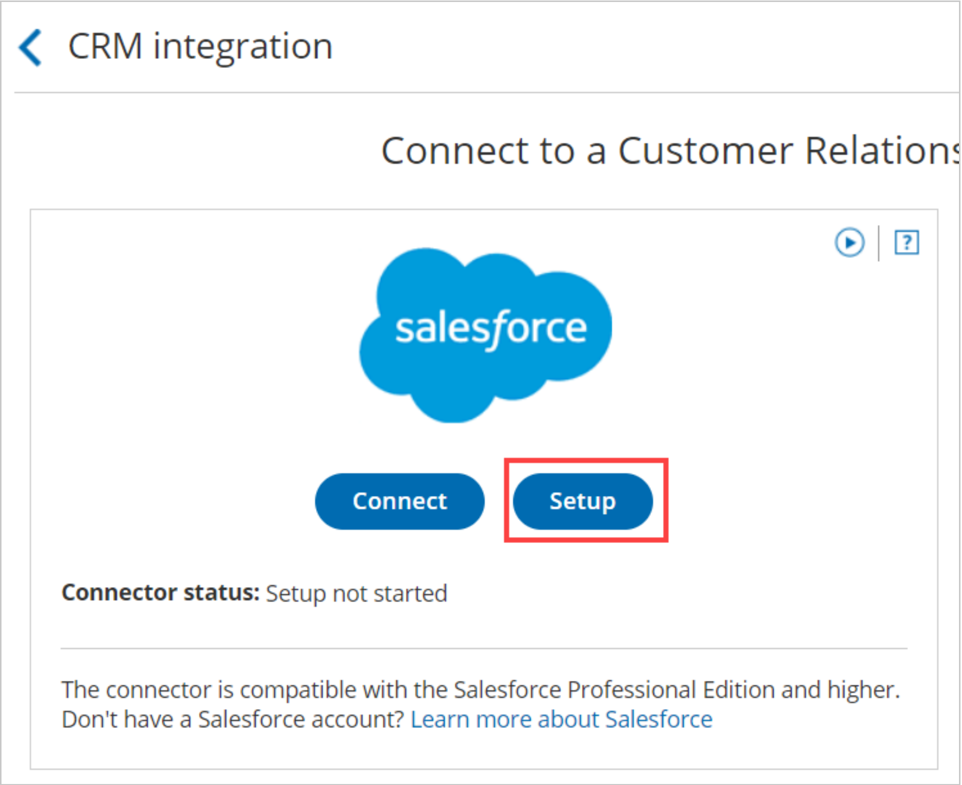


Figure 1: Set up API Connection in OnceHub

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

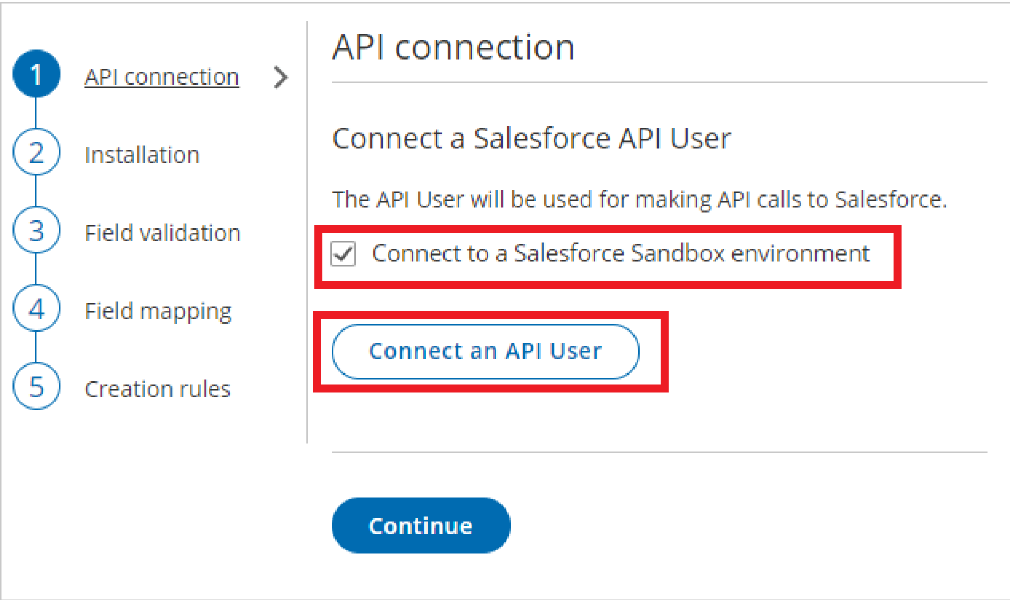


Figure 2: Connect to a Salesforce Sandbox environment

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.

Installing the OnceHub connector for Salesforce [Classic]

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).

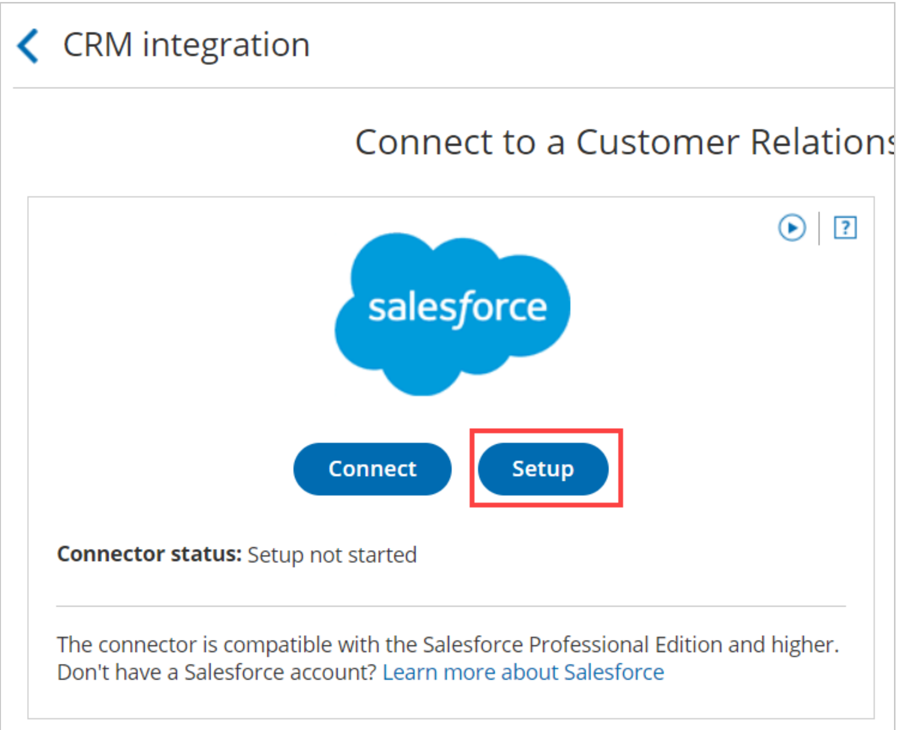


Figure 1: Set up API Connection in OnceHub

3. On the **Installation** tab, click the **Install connector** button (Figure 2).

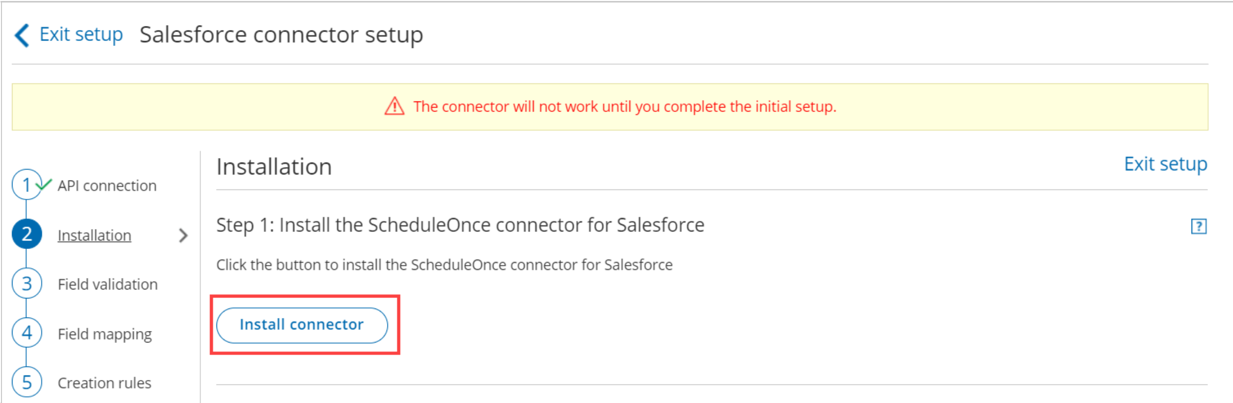


Figure 2: Install connector

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).

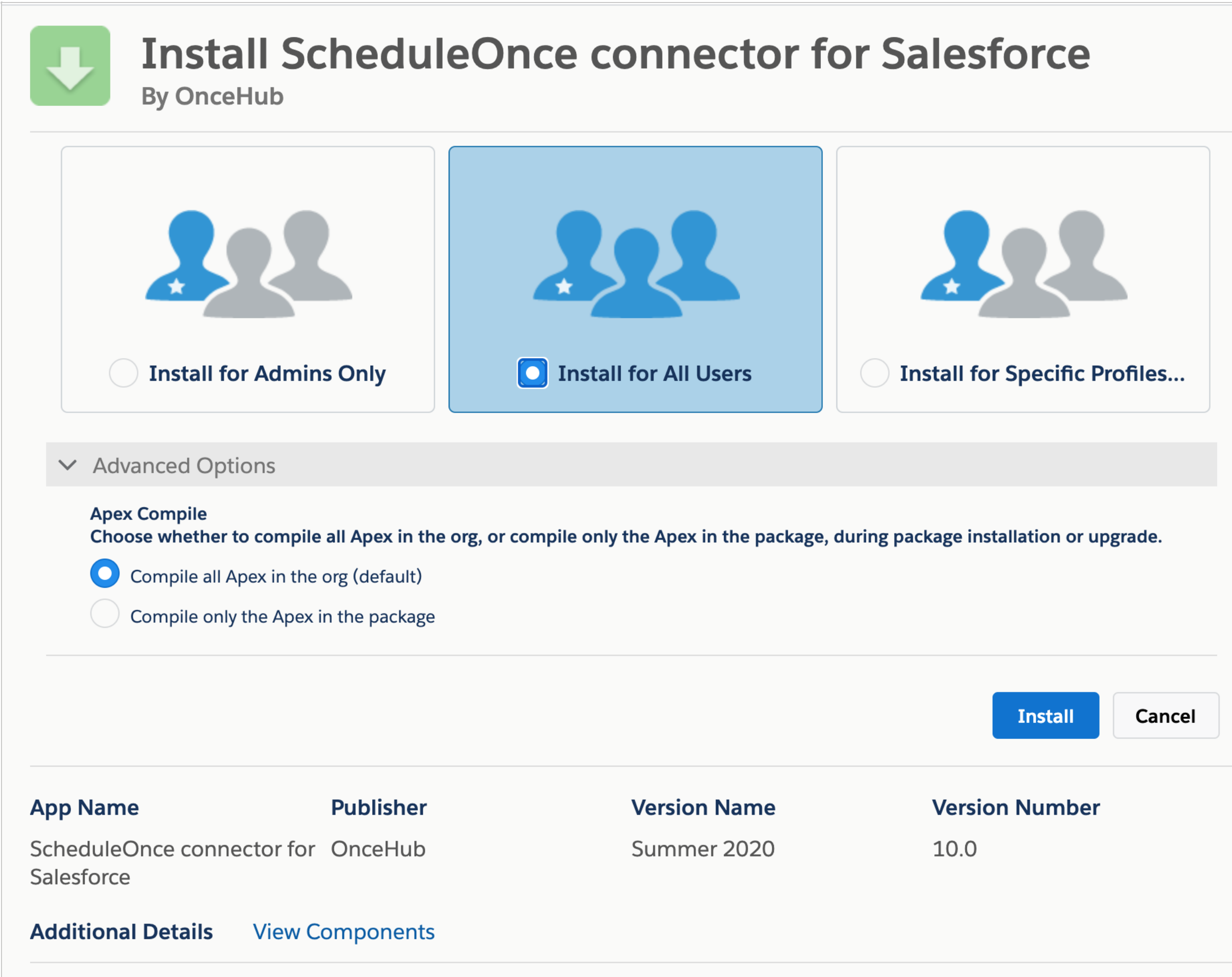


Figure 3: Install for All Users

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).

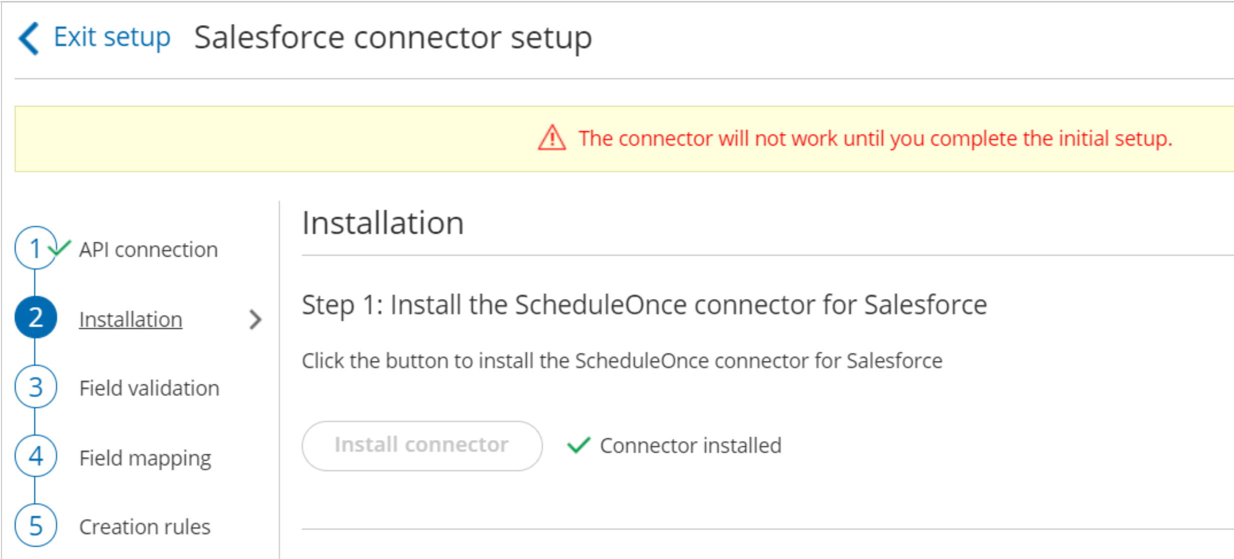


Figure 4: Connector installed

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.

Assigning the OnceHub permission set to the Salesforce API user [Classic]

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).

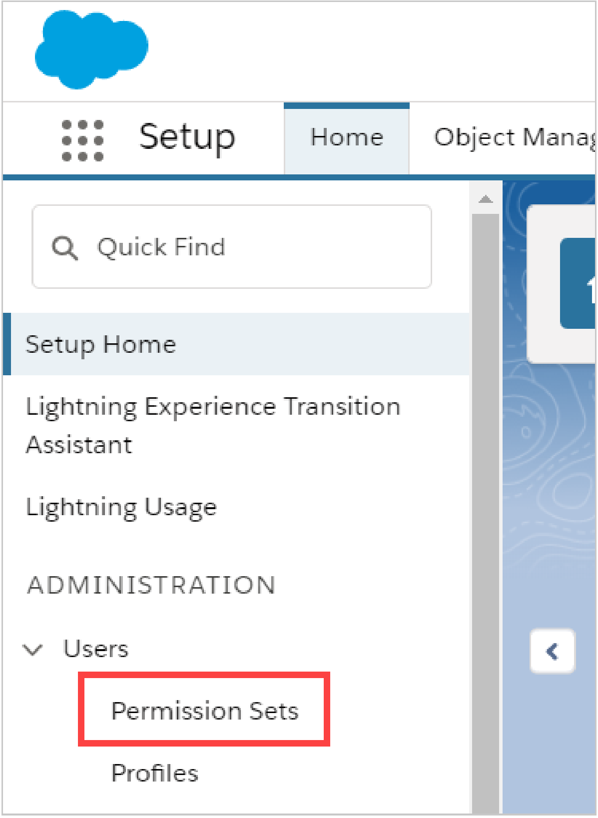


Figure 1: Permission Sets in the Users menu

4. In the **Permission Sets** pane, click **OnceHub connector for Salesforce permission set** (Figure 2).

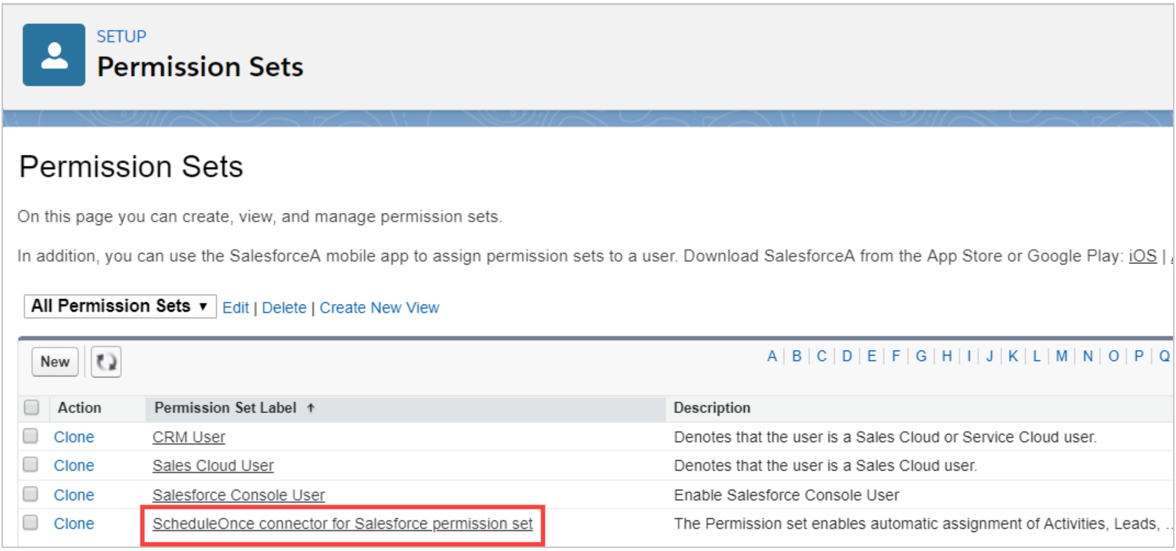


Figure 2: OnceHub connector for Salesforce permission set

5. On the **OnceHub connector for Salesforce** permission set page, click the **Manage Assignments** button (Figure 3).

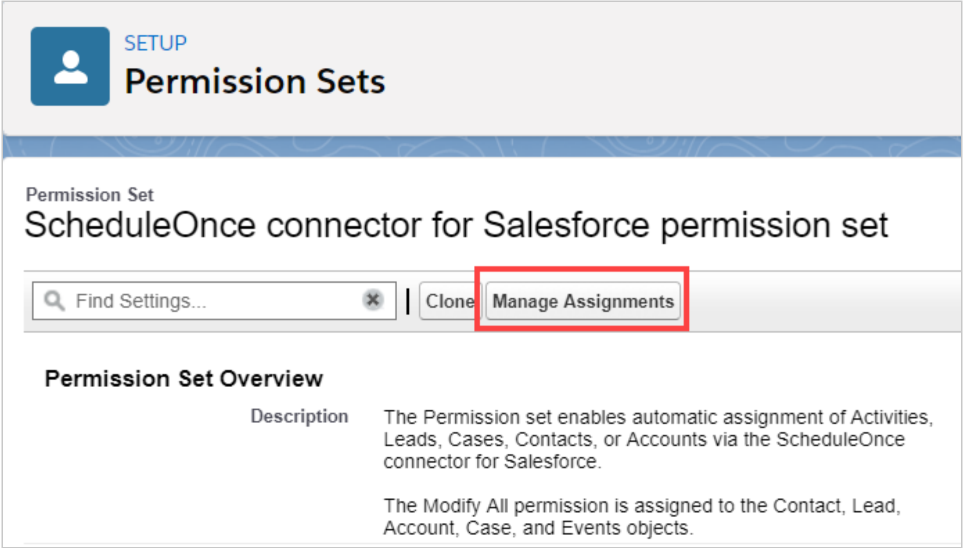


Figure 3: Manage Assignments

6. On the **Assigned Users** page, click the **Add Assignments** button (Figure 4).

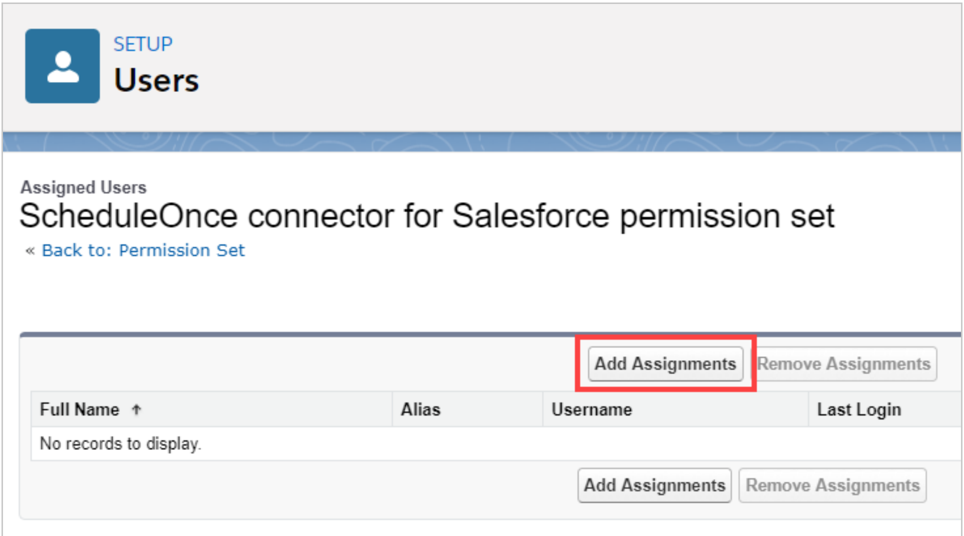


Figure 4: Add Assignments

7. In the **All Users** list, check the box next to your API User and click **Assign** (Figure 5).

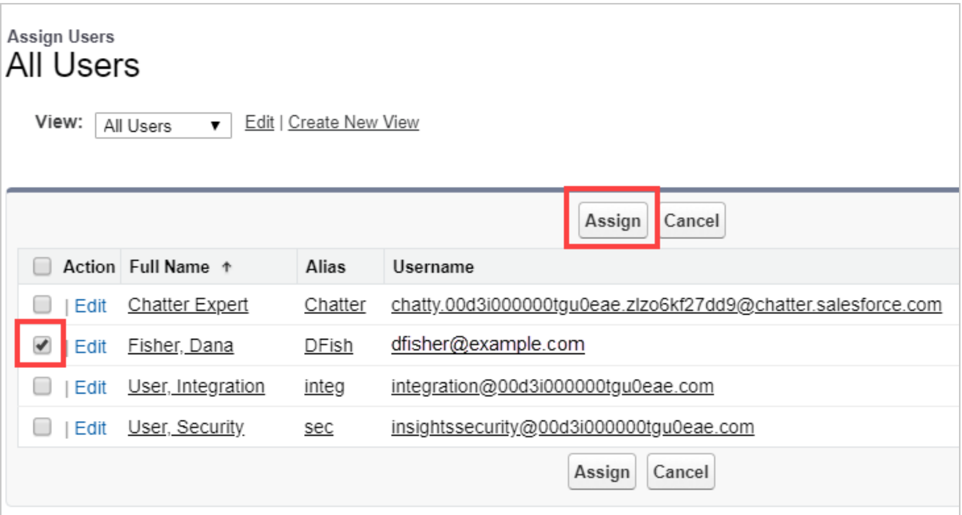


Figure 5: Assign API user

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.

Adding Custom fields to the Salesforce Activity Event Page Layout [Classic]

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).

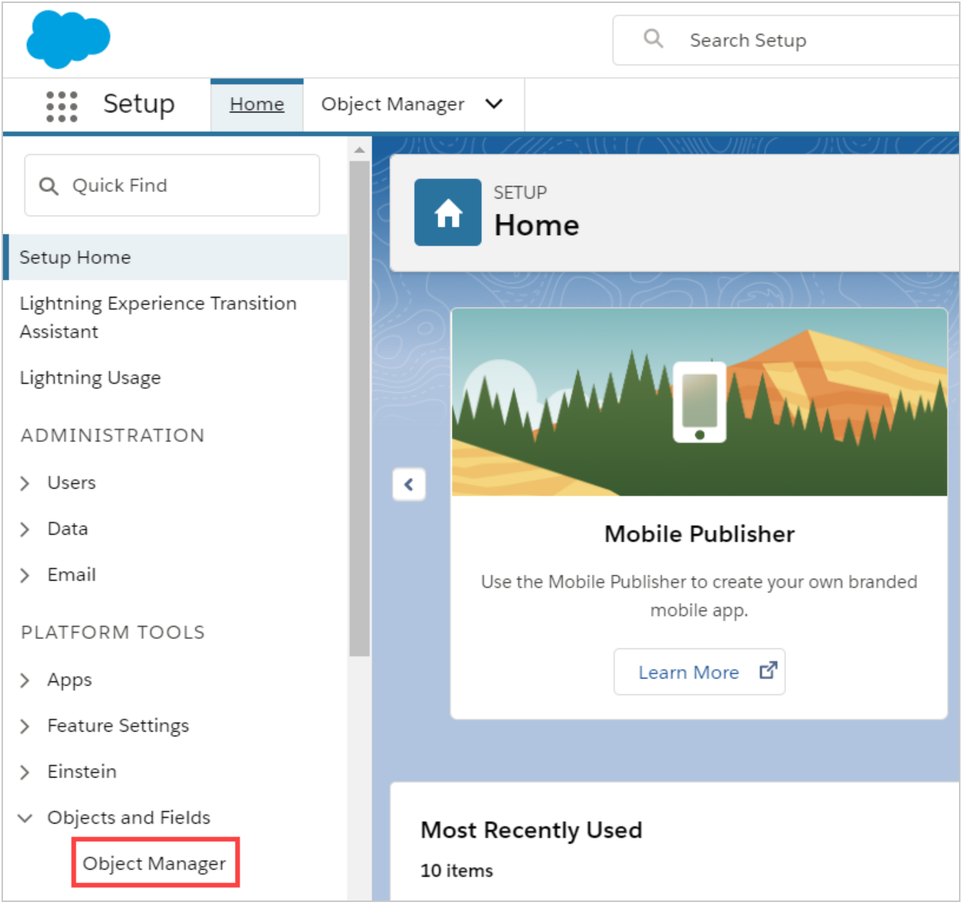


Figure 1: Object Manager in the Objects and Fields menu

4. In the **Object Manager** list, select **Event** (Figure 2).

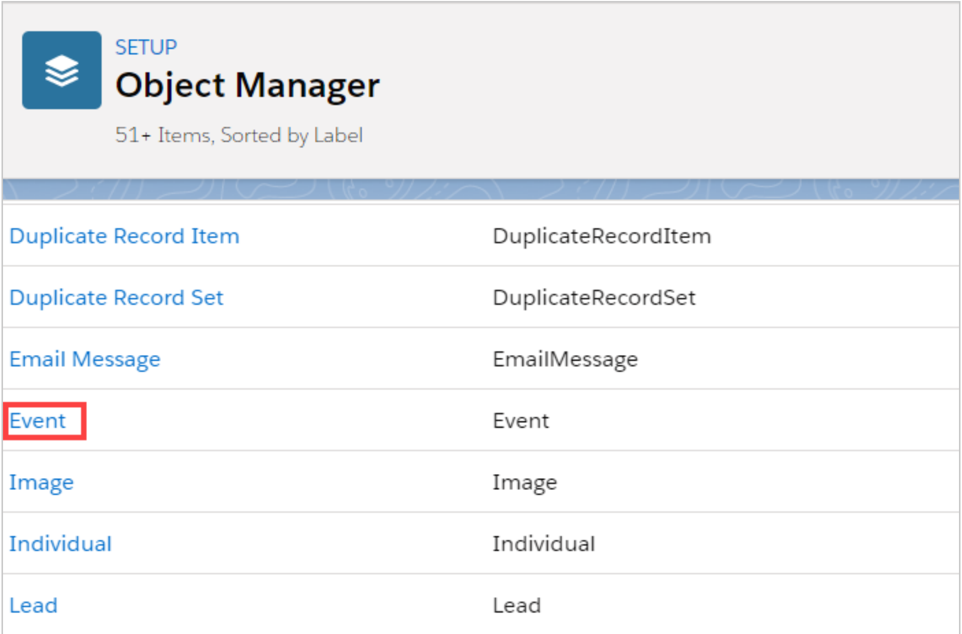


Figure 2: Event in the Object Manager list

5. On the **Event** page, select **Page Layouts -> Event Layout** (Figure 3).

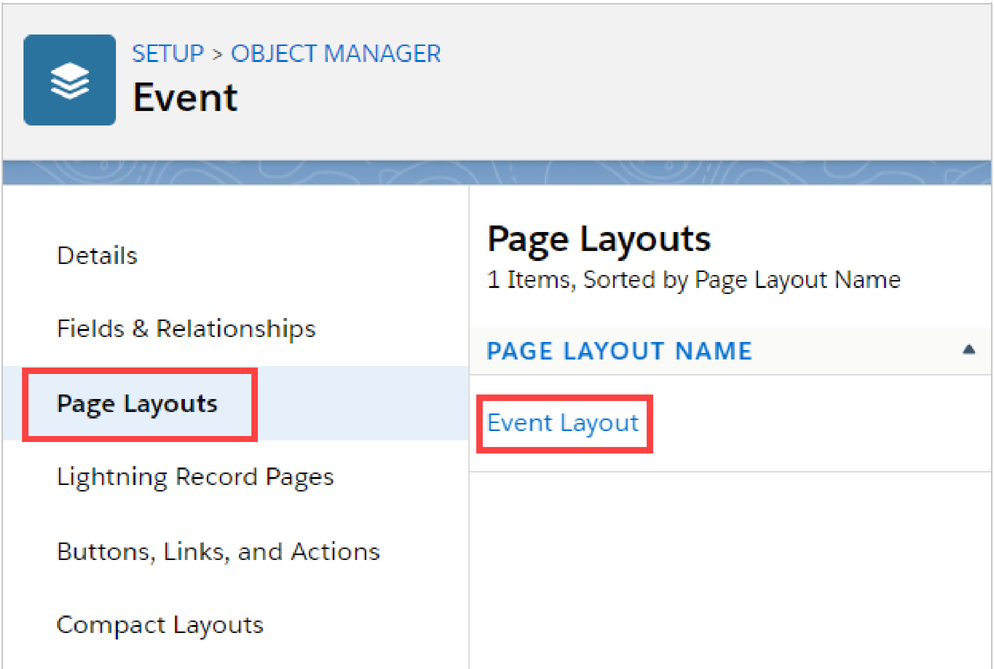


Figure 3: Event layout

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.

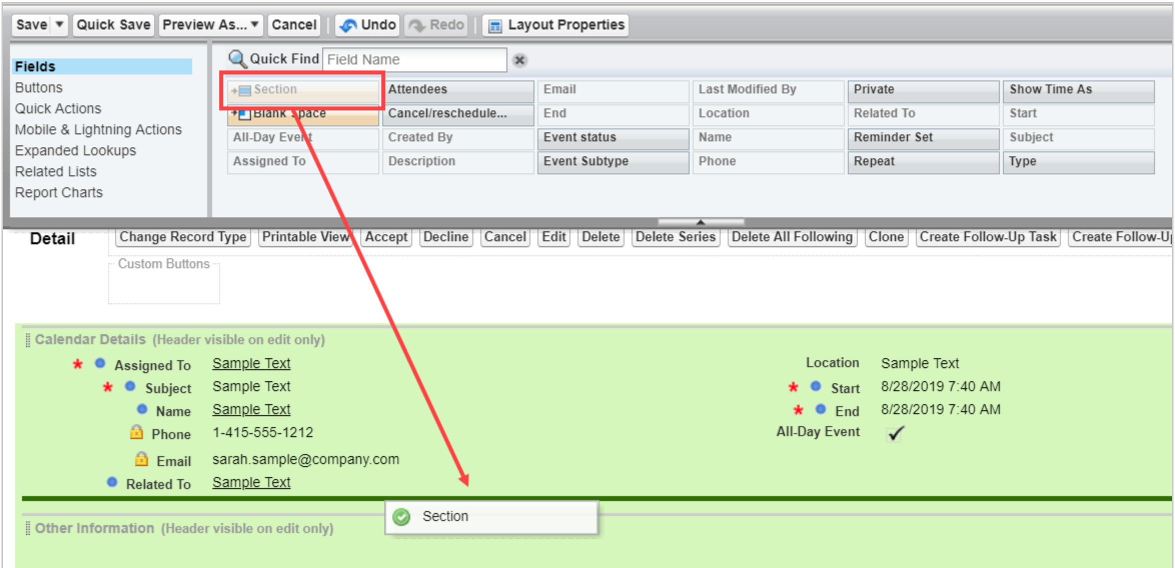


Figure 4: Add a new section

7. In the **Section Properties** pop-up, enter a **Section Name** and click **OK** (Figure 5).

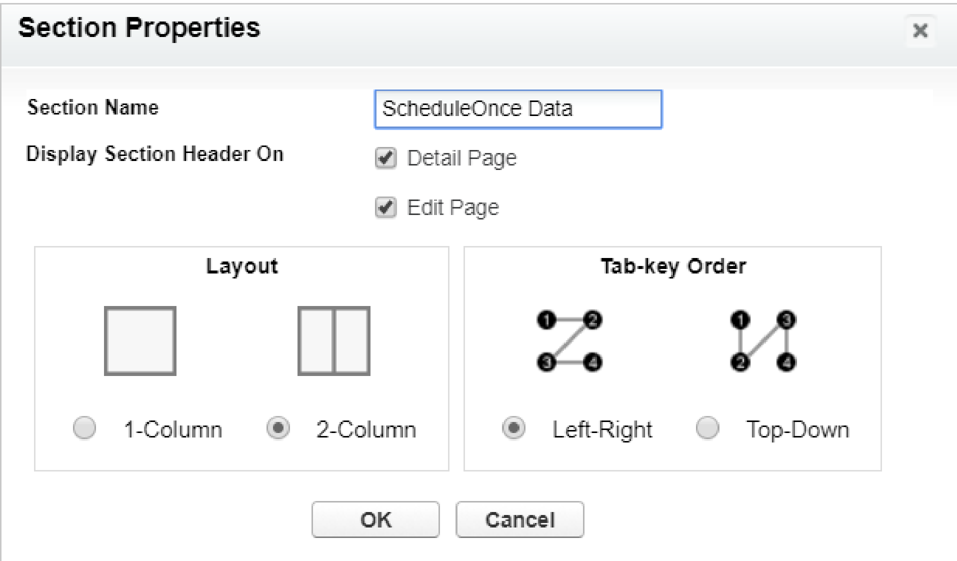


Figure 5: Section Properties pop-up

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).

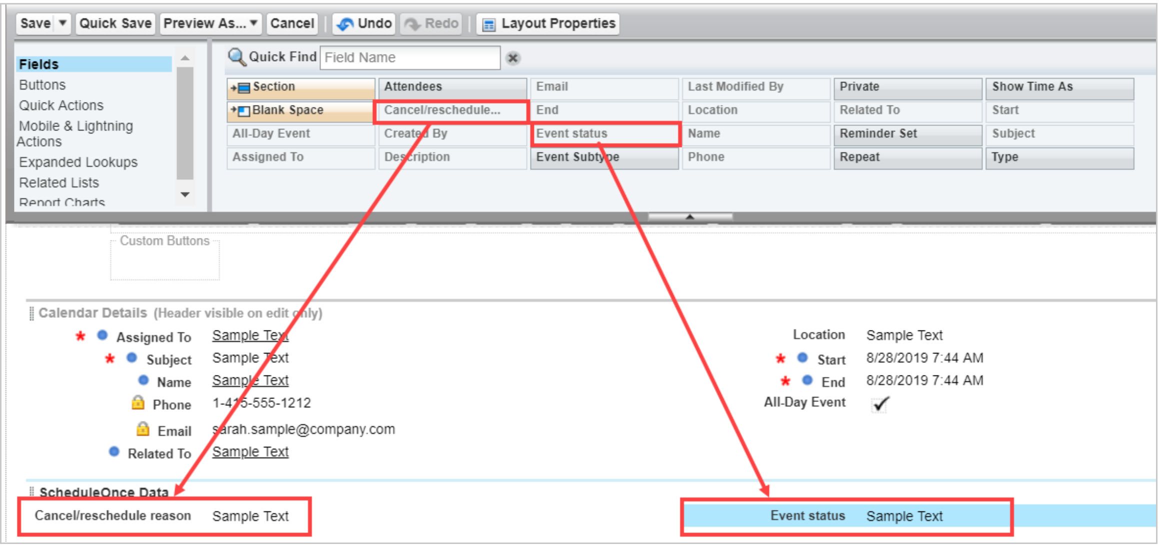


Figure 6: Add elements to new section

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).

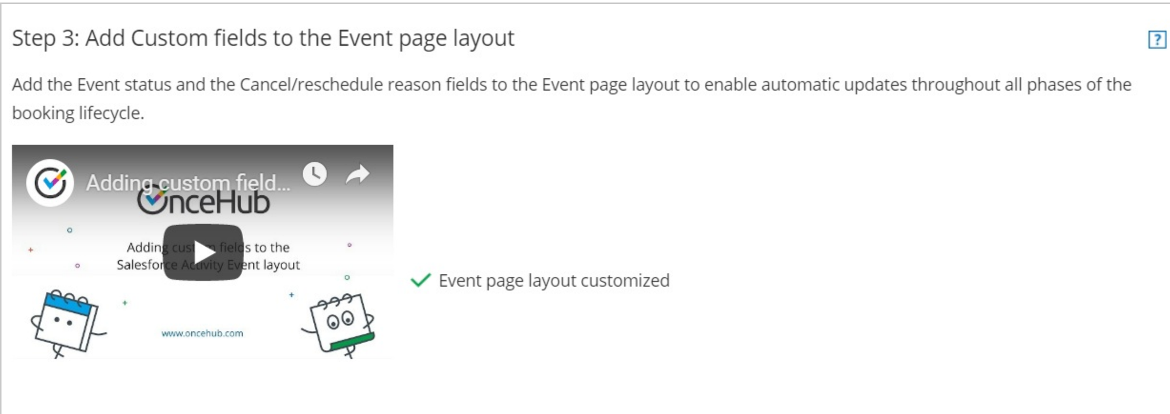


Figure 7: Event page layout customized

> **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 [Classic]

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).

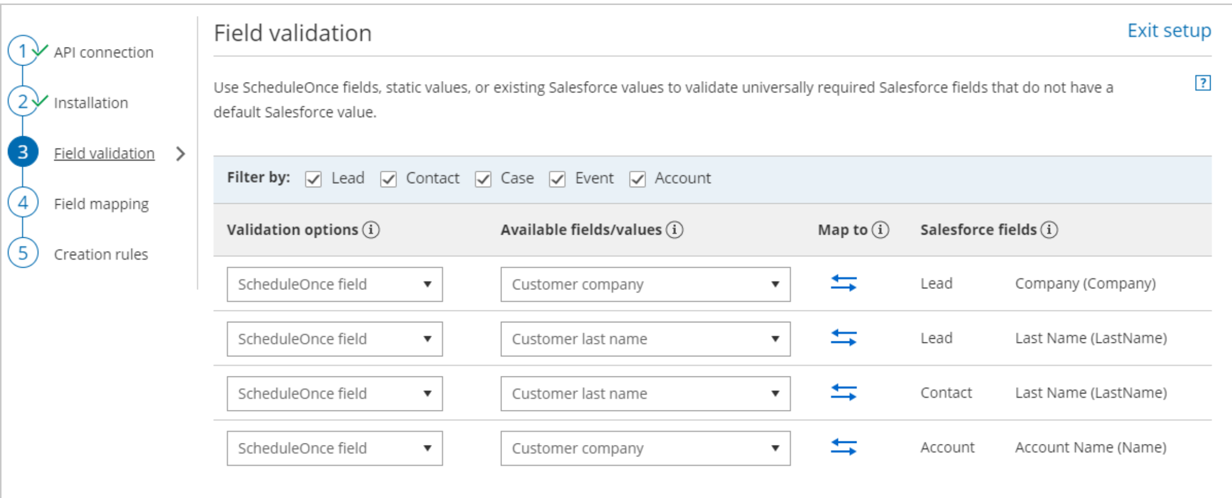


Figure 1. Validation field mapping.

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 [Classic]

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.

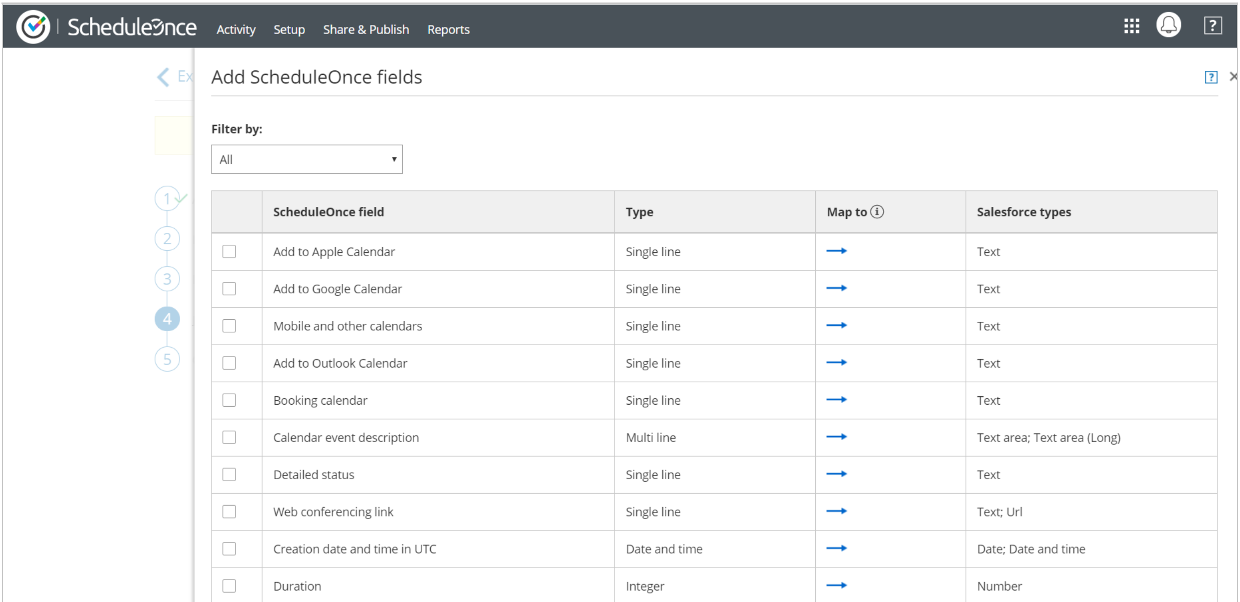


Figure 1: Add OnceHub fields pop-up

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 [Classic]

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).

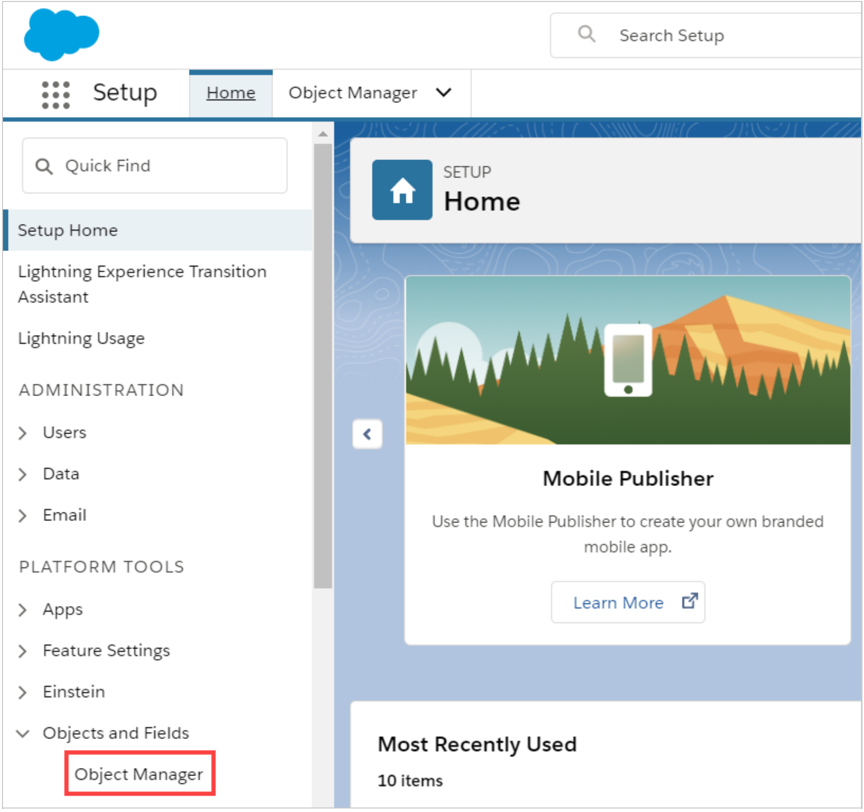


Figure 1: Object Manager in the Objects and Fields menu

4. In the **Object Manager** list, select **Lead** (Figure 2).

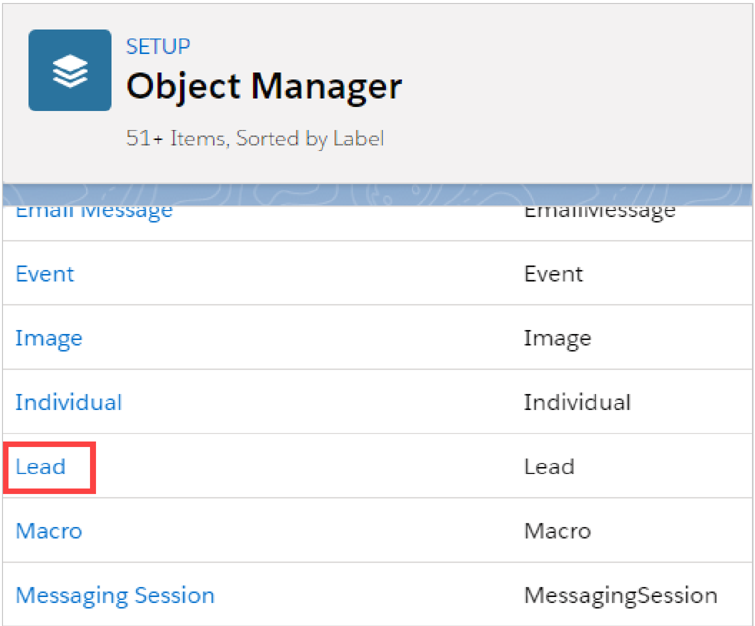


Figure 2: Lead in the Object Manager list

5. Select **Field & Relationships -> New** (Figure 3).

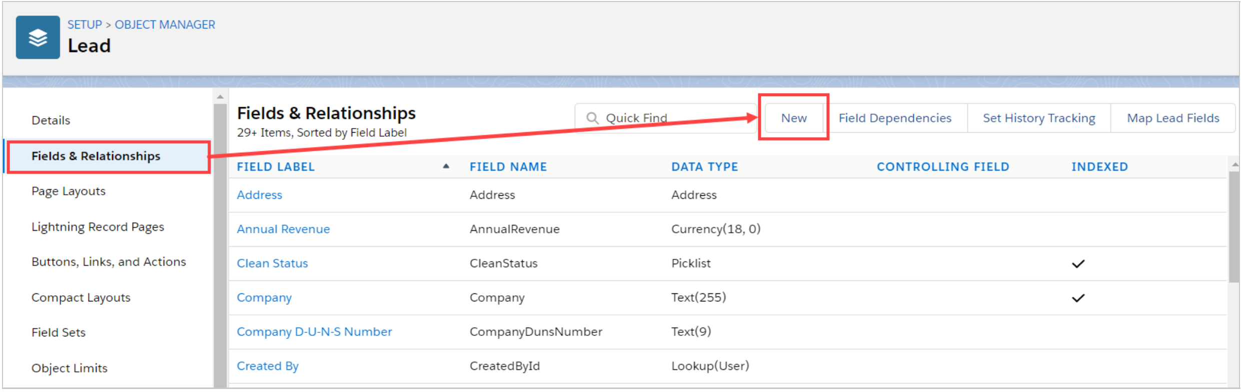


Figure 3: Fields & Relationships

6. In the **New Custom Field** pane, select **Text** and click **Next** (Figure 4).

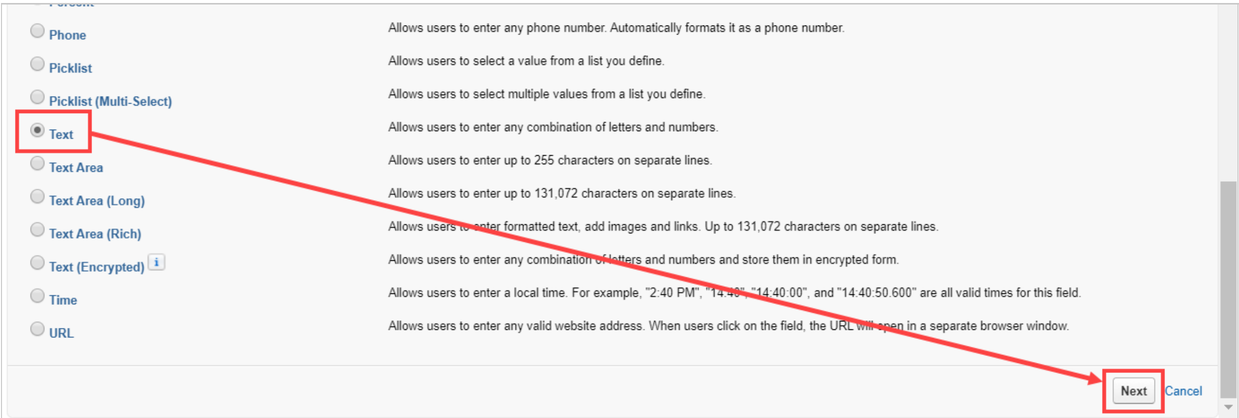


Figure 4: Text field

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

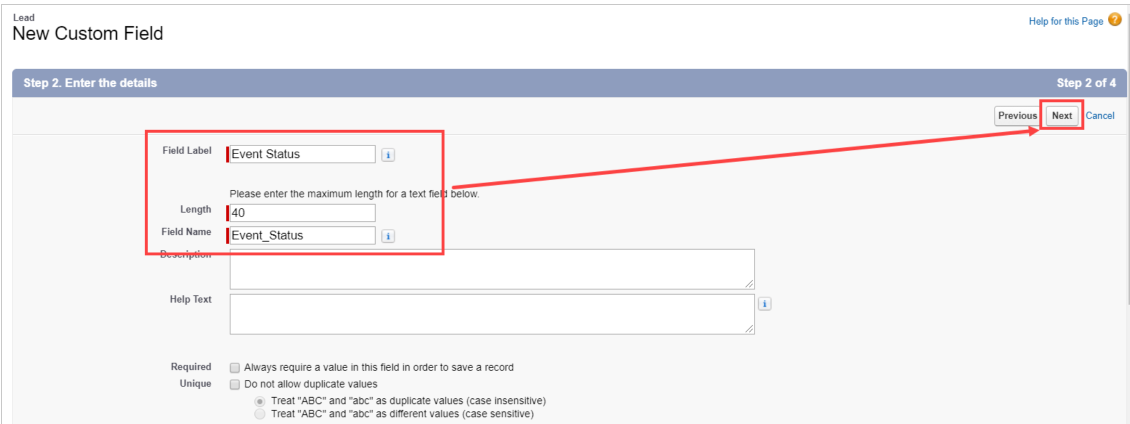


Figure 5: Step 2 Enter the details

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).

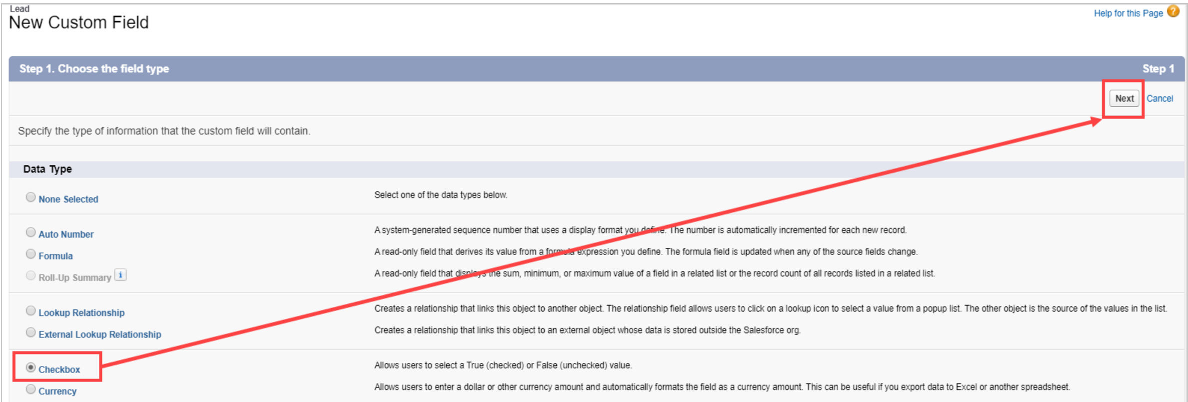


Figure 6: Checkbox

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

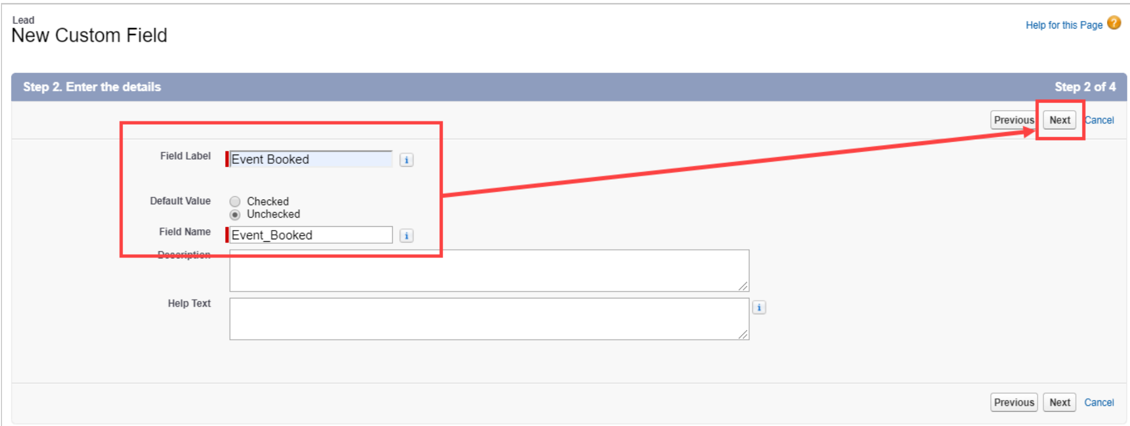


Figure 7: Step 2 Enter the details

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).

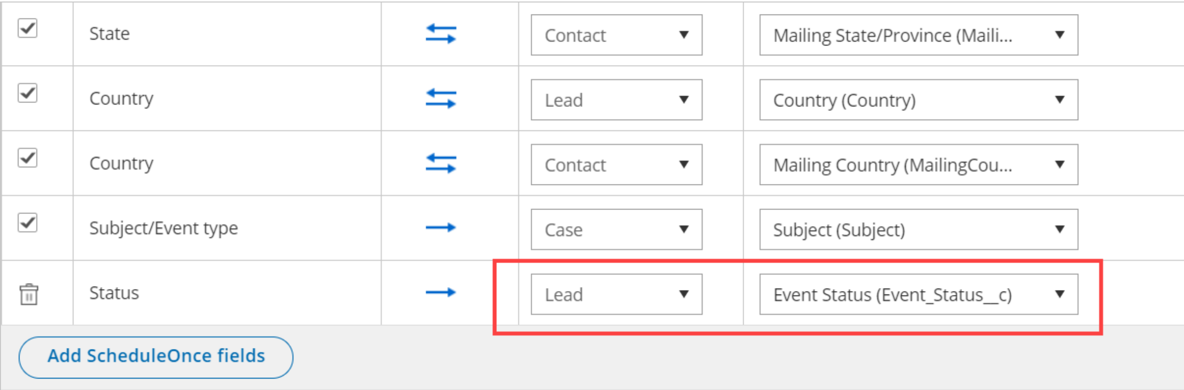


Figure 8: Map the Status field

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).

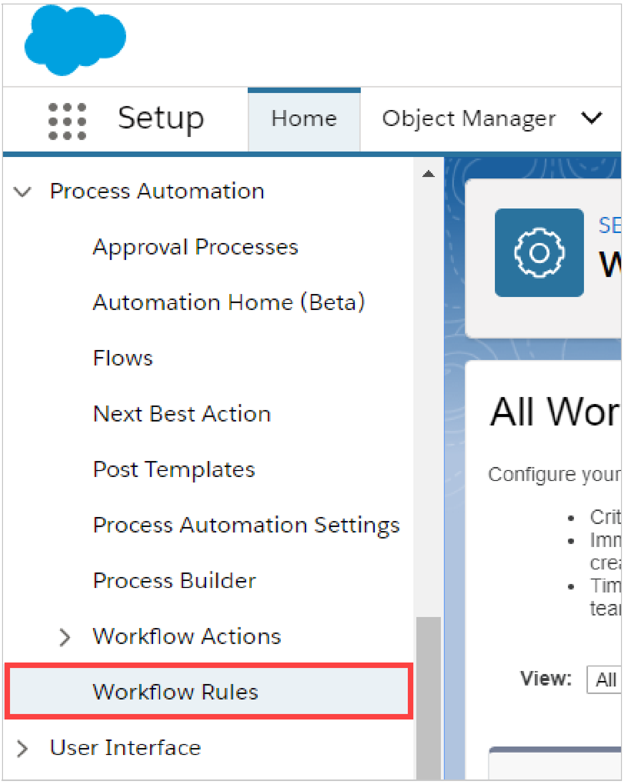


Figure 9: Workflow Rules

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

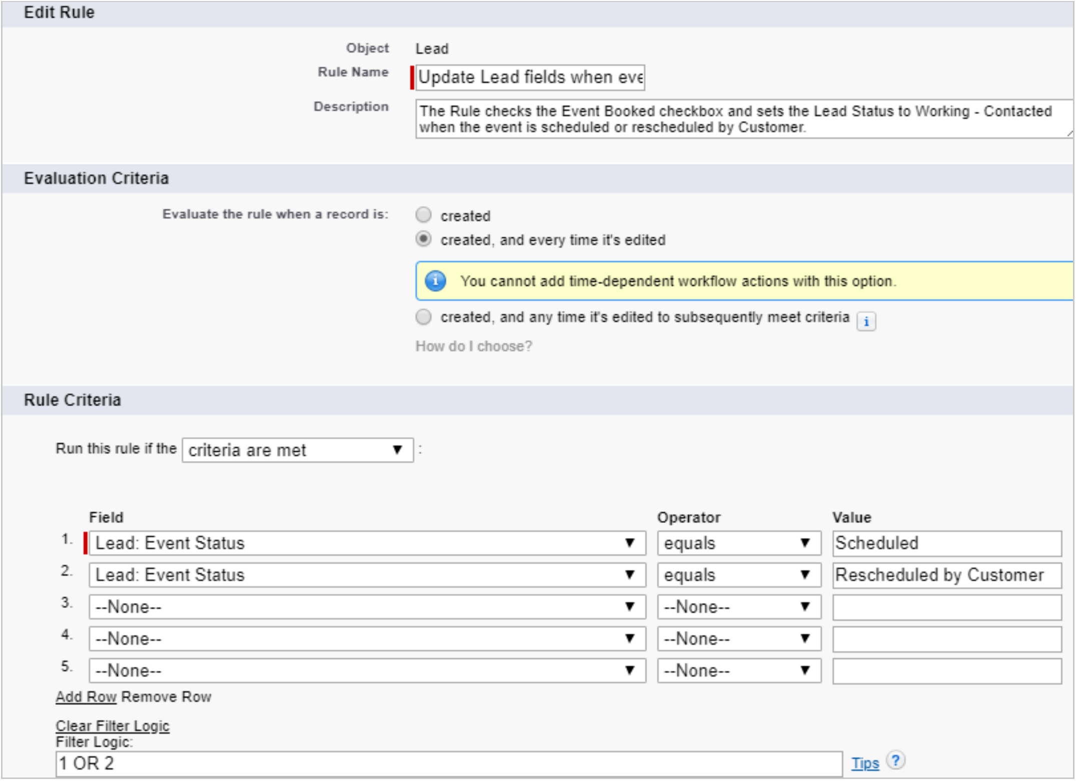


Figure 10: Update Lead fields when event is scheduled or rescheduled by Customer

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

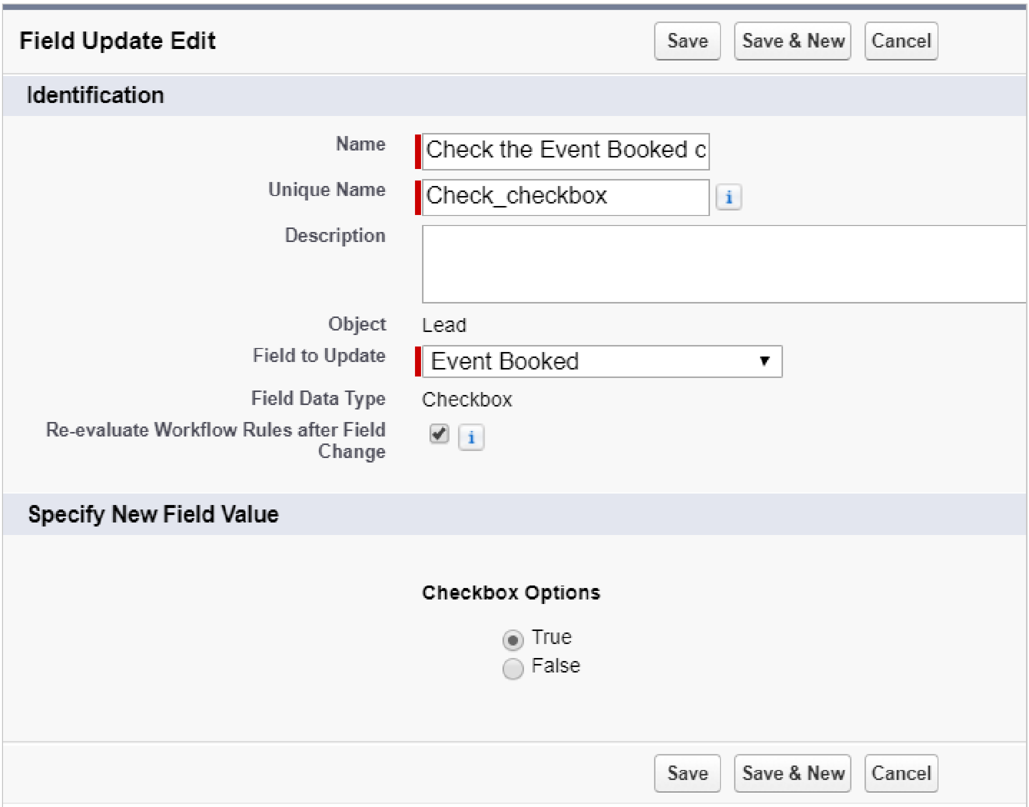


Figure 11: Automatically check the Event Booked checkbox

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

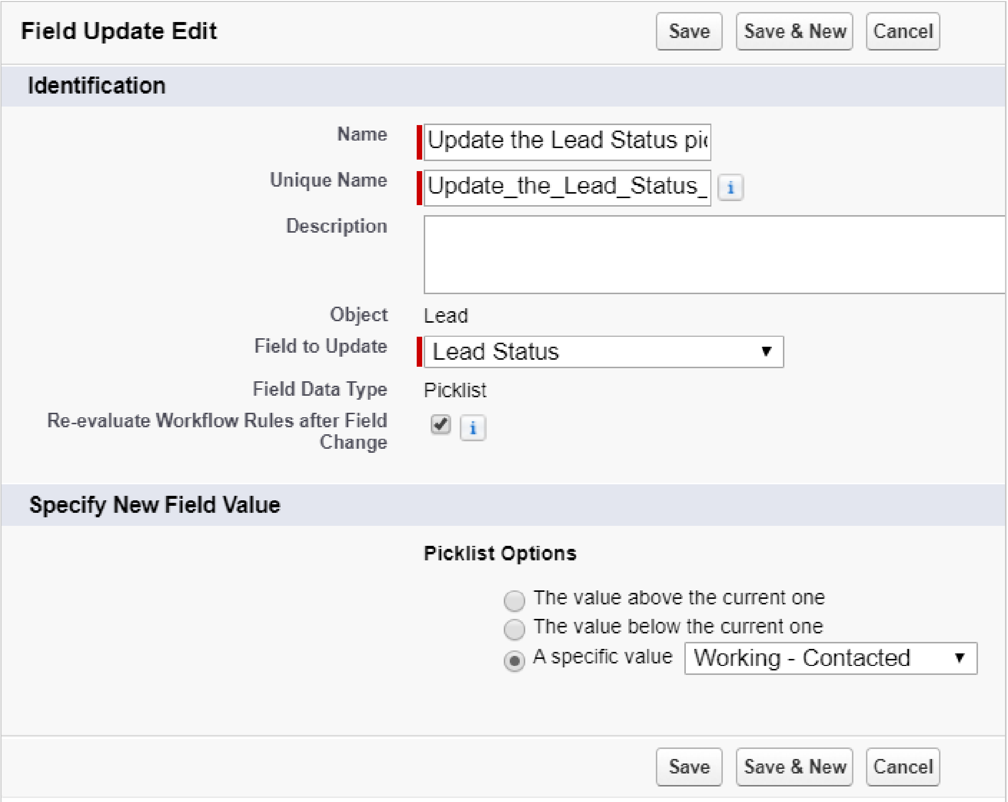


Figure 12: Update the Lead Status picklist to Working - Contacted

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 [Classic]

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).

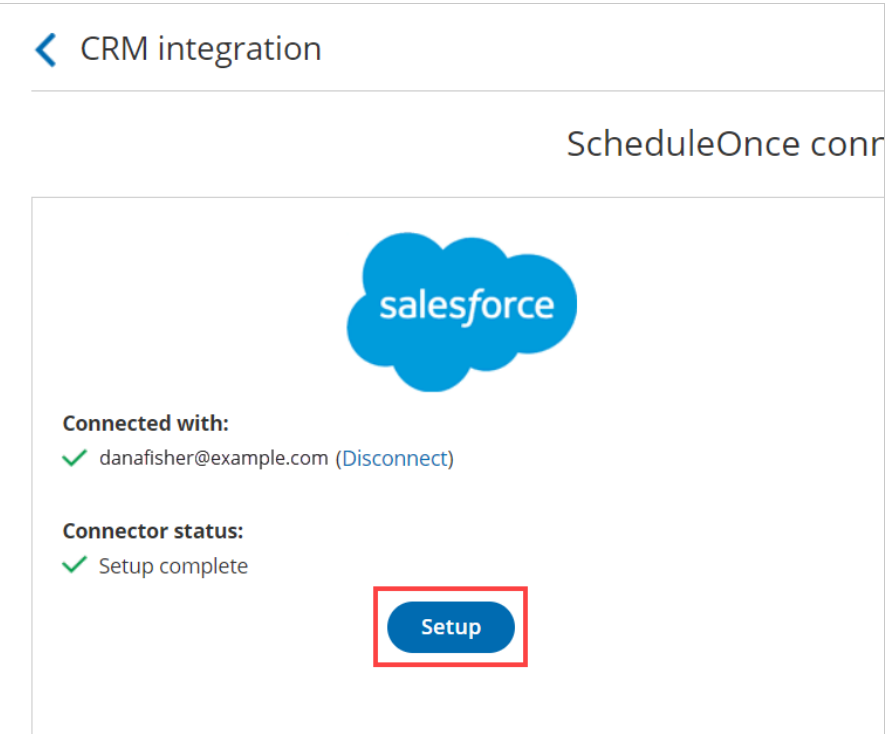


Figure 1: Salesforce setup

On the **Salesforce connector setup** page, select **Creation rules** (Figure 2).

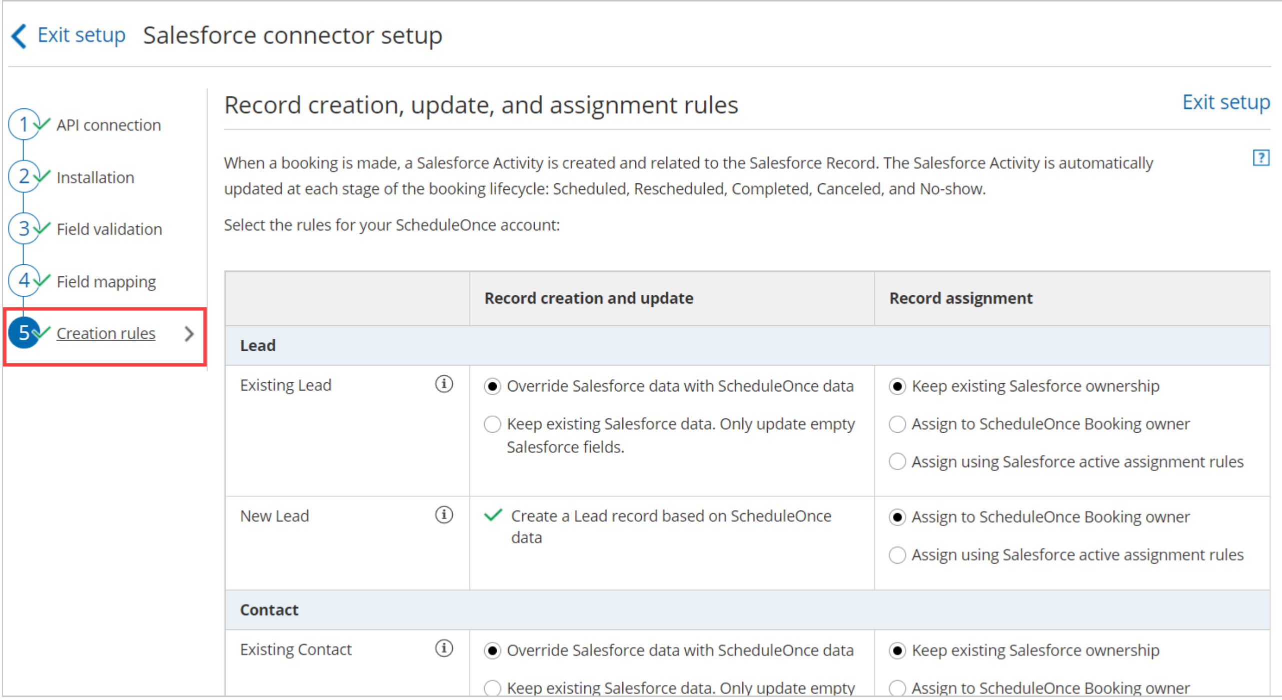


Figure 2: Creation rules

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

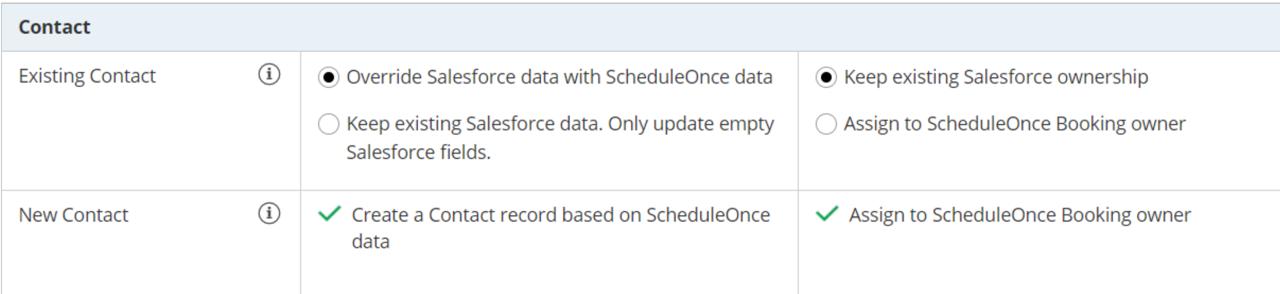


Figure 4: Contact records

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

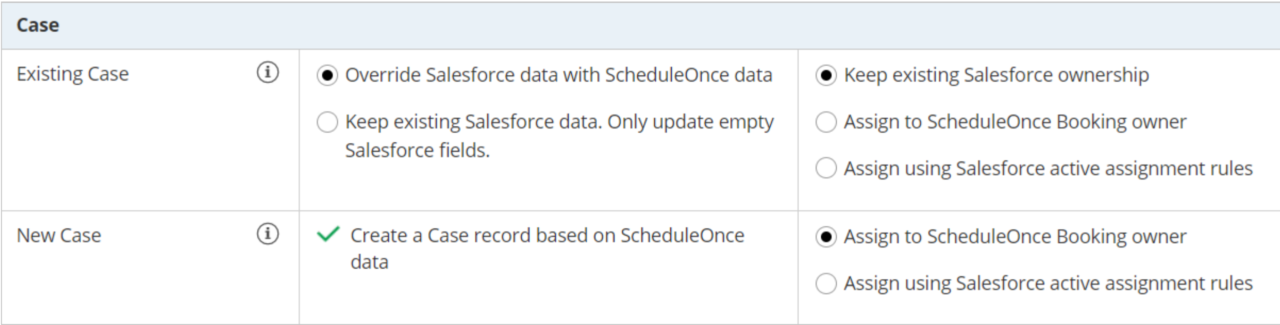


Figure 5: Case records

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 [Classic]

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 [Classic]

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 [Classic]

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).

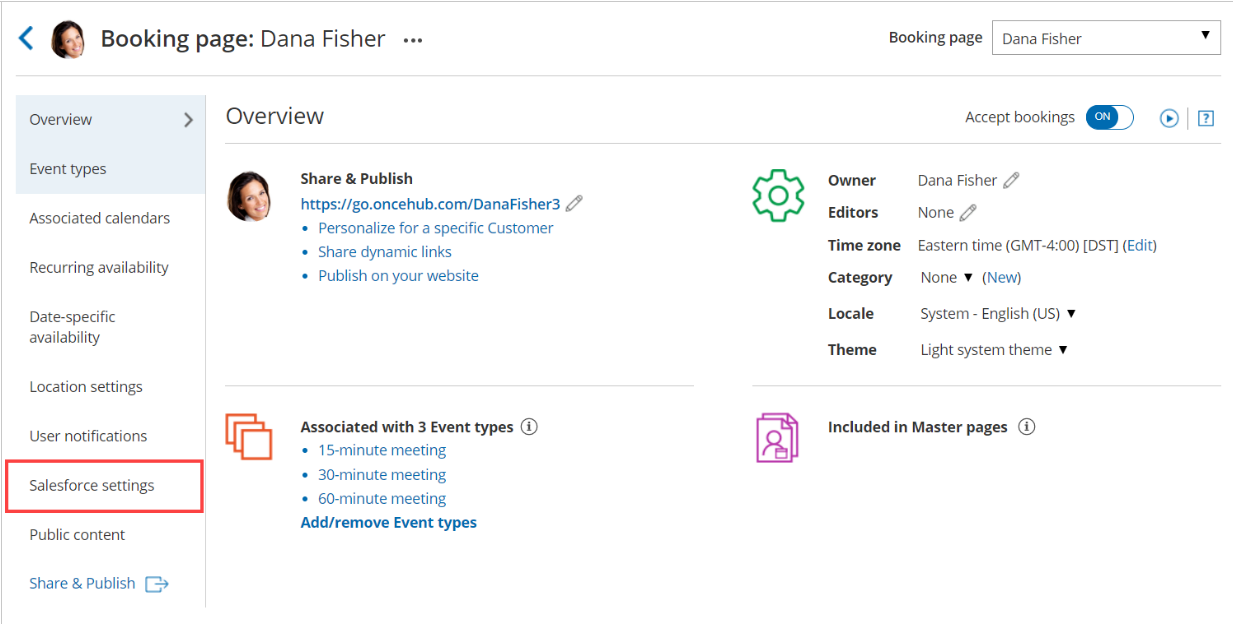


Figure 1: Salesforce settings on a Booking page

2. Select the Record Type that should be assigned to the Lead, Account, Contact, Event, and Case objects (Figure 2).

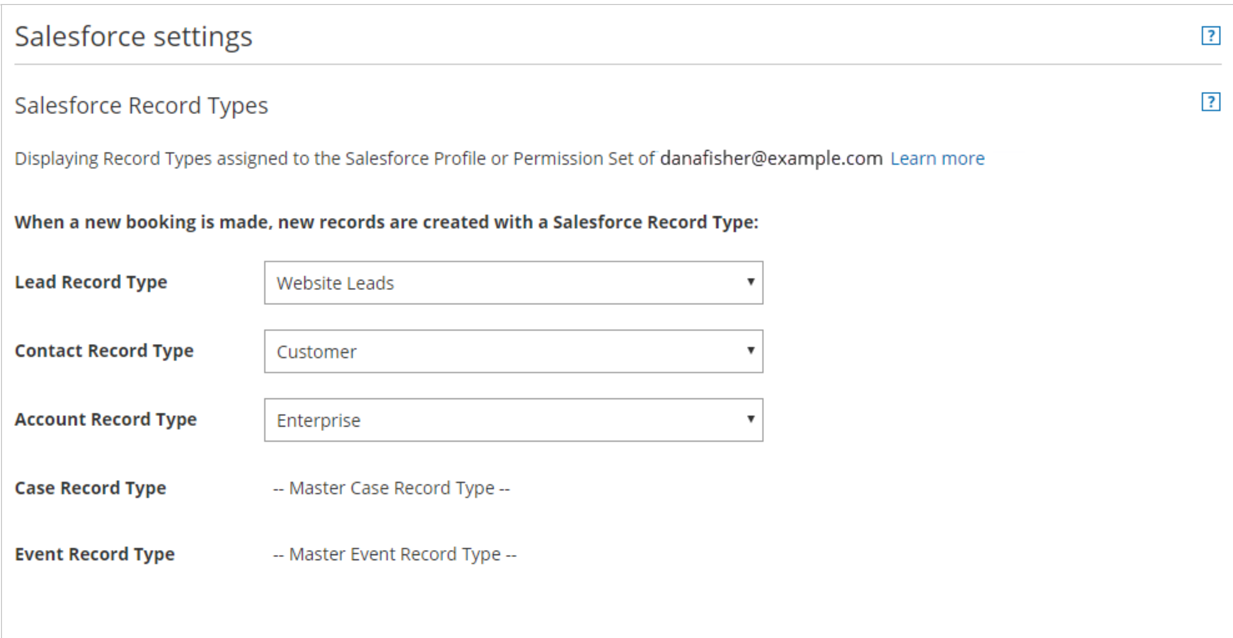


Figure 2: Salesforce Record Types settings

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).

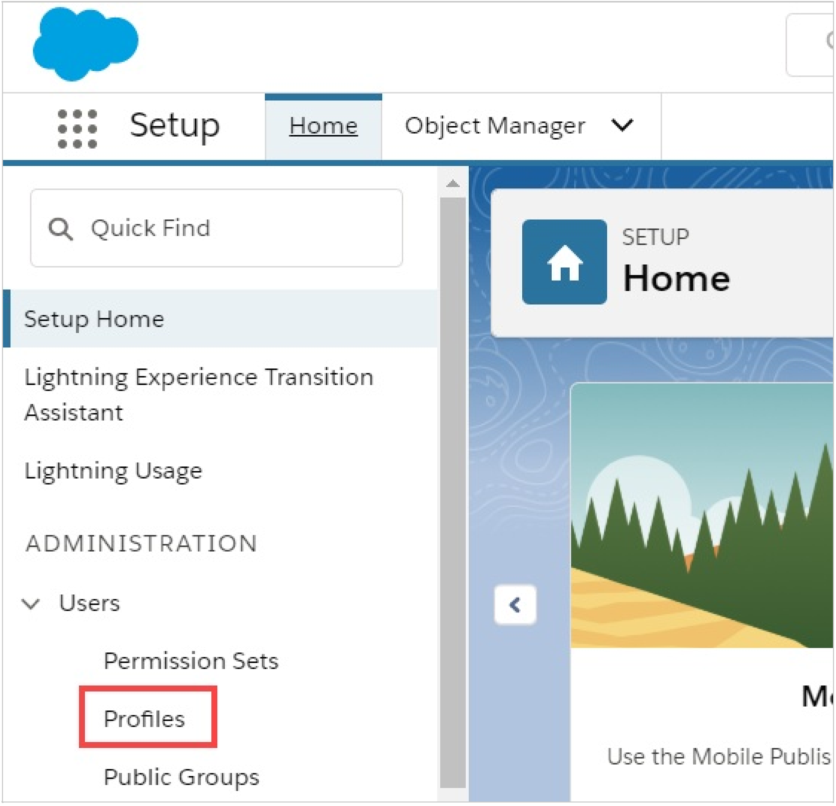


Figure 3: Profiles in the Users section

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 [Classic]

Our Infusionsoft integration makes OnceHub an integral part of your Infusionsoft solution, integrating your bookings with your Infusionsoft account.

Note: You need to be a OnceHub Administrator to set up and manage the Infusionsoft integration.

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.

Click on the gear icon in the top-right → **CRM**.

Once a User with Administrator privileges has connected, OnceHub Members simply need to sign in to their OnceHub accounts.

They should click on the gear icon in the top-right → **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.

Connecting to Infusionsoft [Classic]

In this article, you will learn how to connect to your Infusionsoft account. Each OnceHub User should connect to his/her own Infusionsoft account.

Note: Only OnceHub Administrators can set up and manage the Infusionsoft Integration in OnceHub.

Connect to Infusionsoft

1. Click on the gear icon in the top right.
2. Select **CRM** from the dropdown.
3. Click on the tile for **Booking Pages and Master Pages**.
4. In the **Infusionsoft** box, click the **Connect** button.
5. 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.
6. On the CRM page, you will see the Infusionsoft application name, your connected username, and the Infusionsoft connector status.
7. If you are a OnceHub administrator, you will also have the option to configure your Infusionsoft connector by clicking the **Setup** button.

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 steps are completed, you can enjoy the full benefits of Infusionsoft integration.

Prepopulate/skip Booking form step in Infusionsoft integration [Classic]

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 booking [Classic]

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) [Classic]

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)?

You can find **Personalized links (Infusionsoft ID)** in the **Share & Publish** section by following the steps below:

Note:

To use data from Infusionsoft 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).

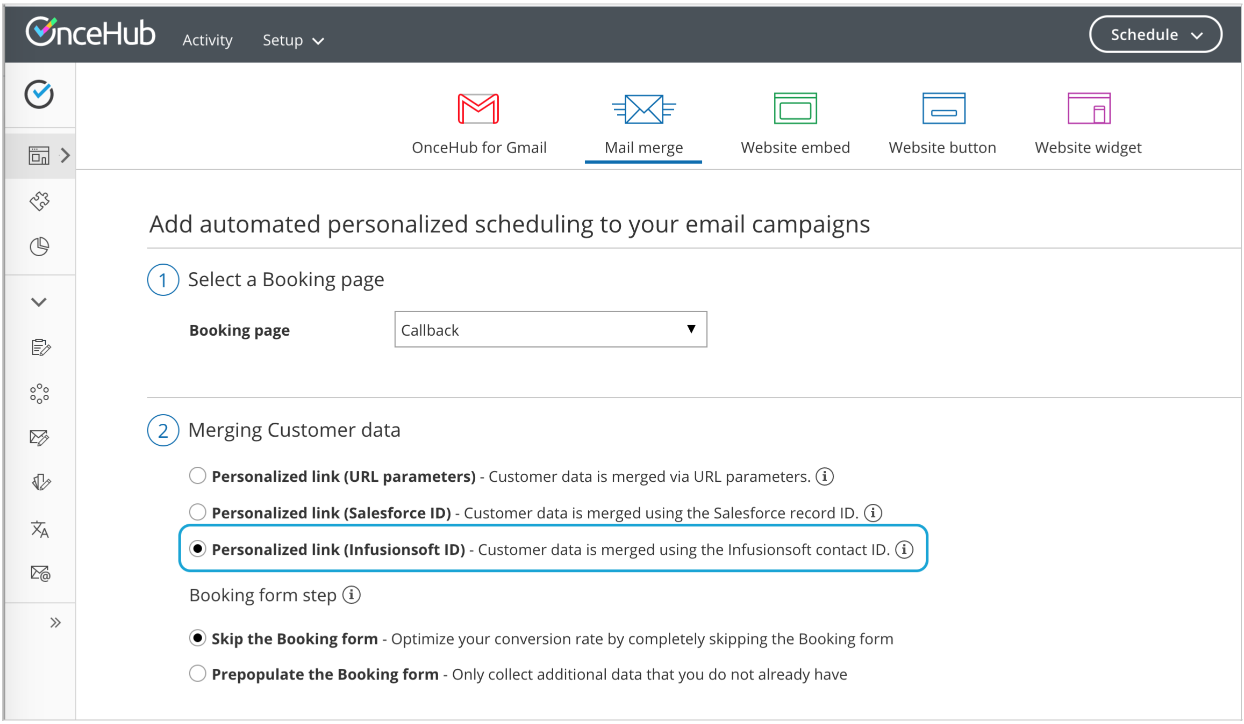


Figure 1: Selecting the Infusionsoft ID personalized link option

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).

Personalizing scheduling on landing pages with InfusionSoft Contact IDs [Classic]

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.

Maximizing booking rates using Infusionsoft campaigns [Classic]

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)

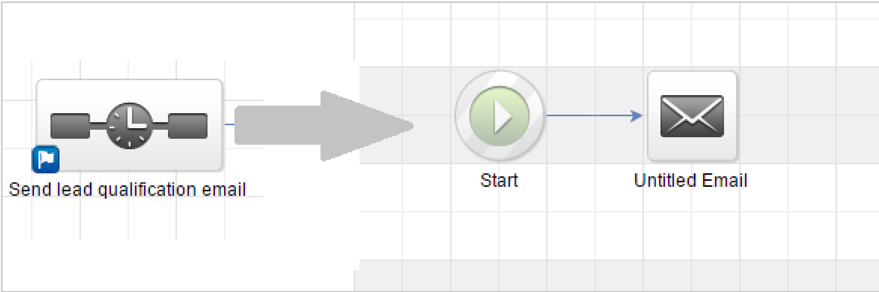


Figure 1: Send qualification Email

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.

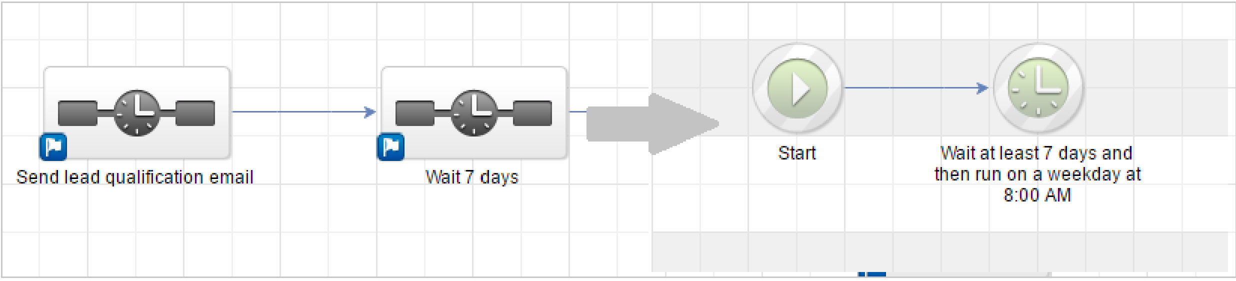


Figure 2: Delay Timer

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 , or button placed in a landing webpage.

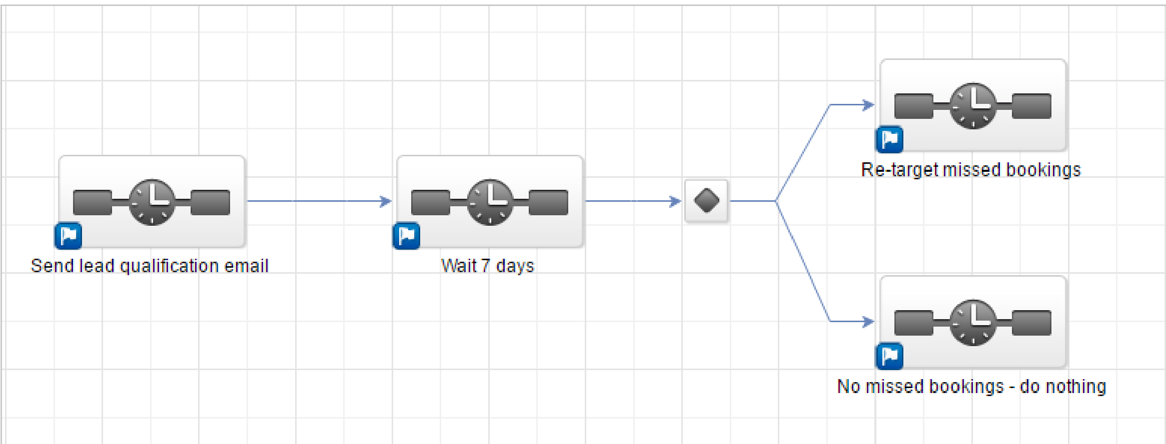


Figure 3: Connection of two sequences

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"

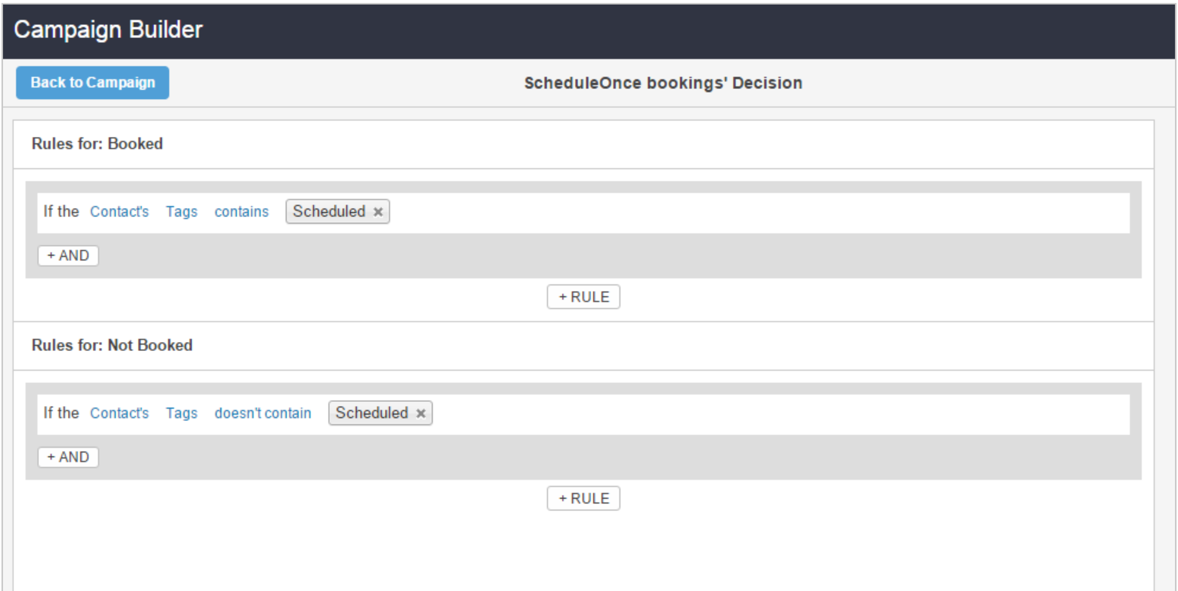


Figure 4: Rules

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 [Classic]

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:

- To 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.

How to add 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.

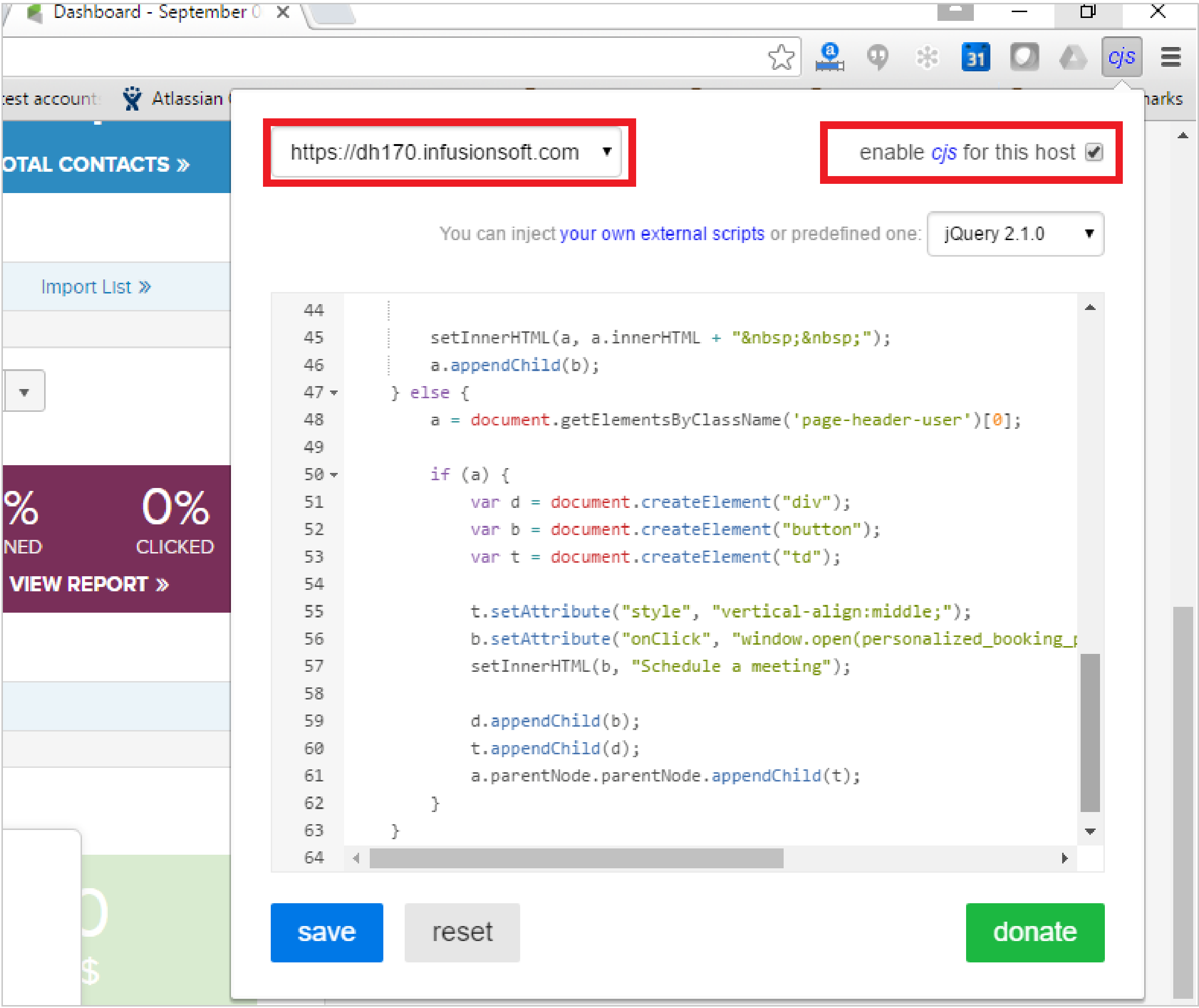


Figure 1: Custom JavaScript extension

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).

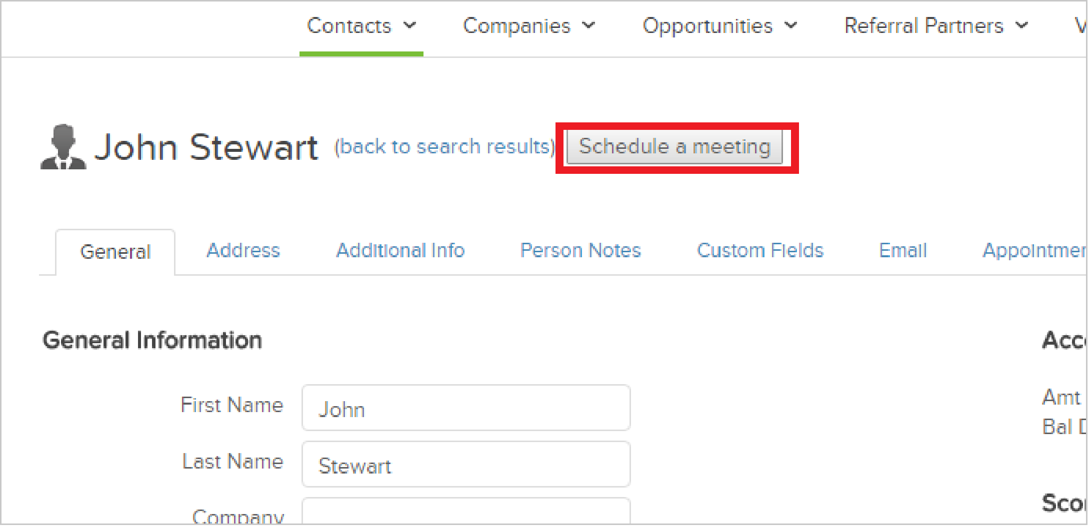


Figure 2: Infusionsoft Scheduling button

Infusionsoft record classification [Classic]

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. Any new Infusionsoft Contact that is created because of a booking made through OnceHub will automatically be 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.

Infusionsoft record creation, update, and assignment rules [Classic]

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 in various cases. 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.

Tagging Infusionsoft Contact records with Lifecycle tags [Classic]

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 [Classic]

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 Customer** - 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 [Classic]

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.

Embedding Infusionsoft tracking code to your Booking forms [Classic]

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.

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 [Classic]

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 [Classic]

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*).

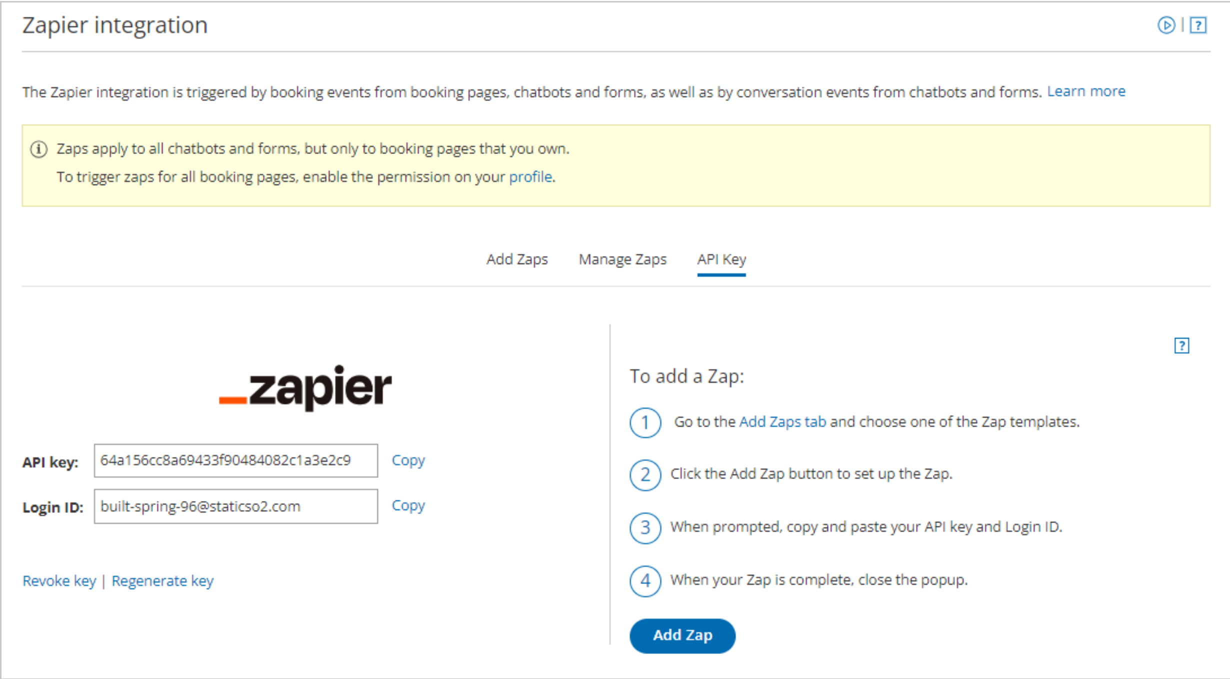


Figure 1: API key generated

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 [Classic]

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).

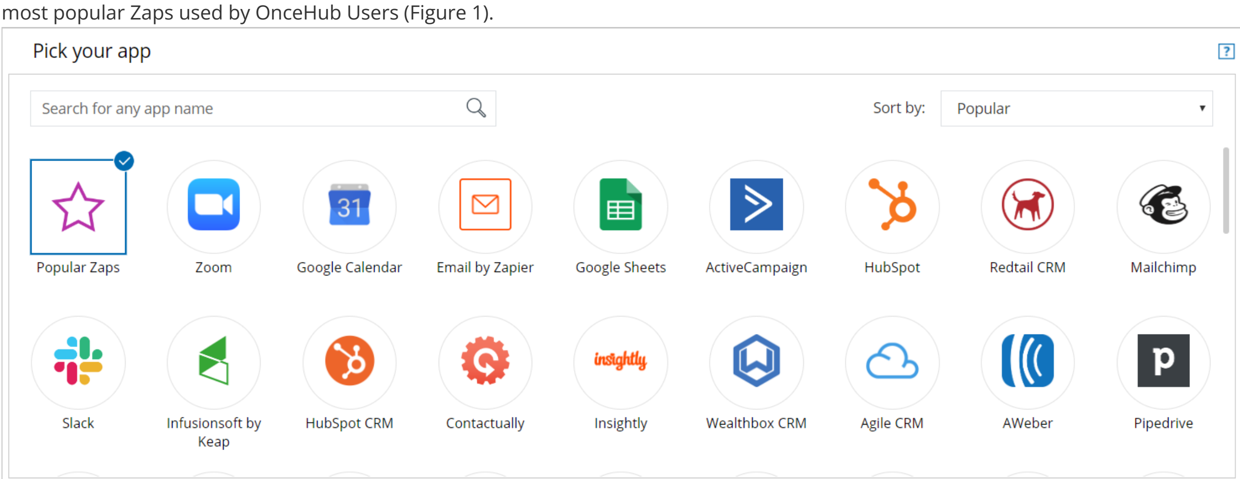


Figure 1: The Add Zaps tab with the Popular Zaps category selected

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).

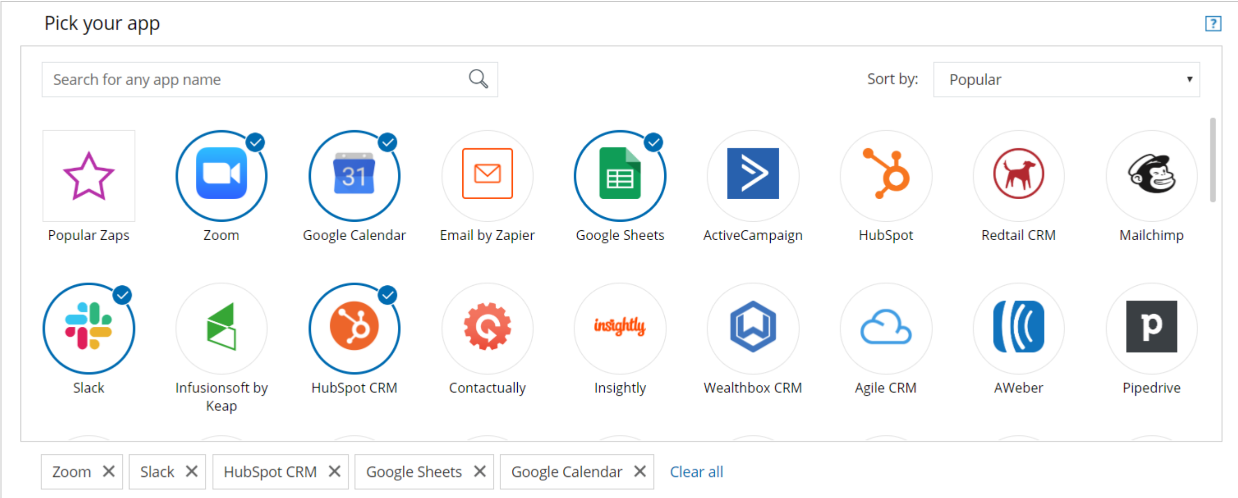


Figure 2: Selecting specific apps

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).

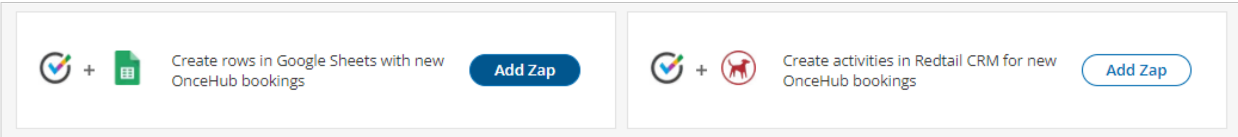


Figure 3: The Add Zap button

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.

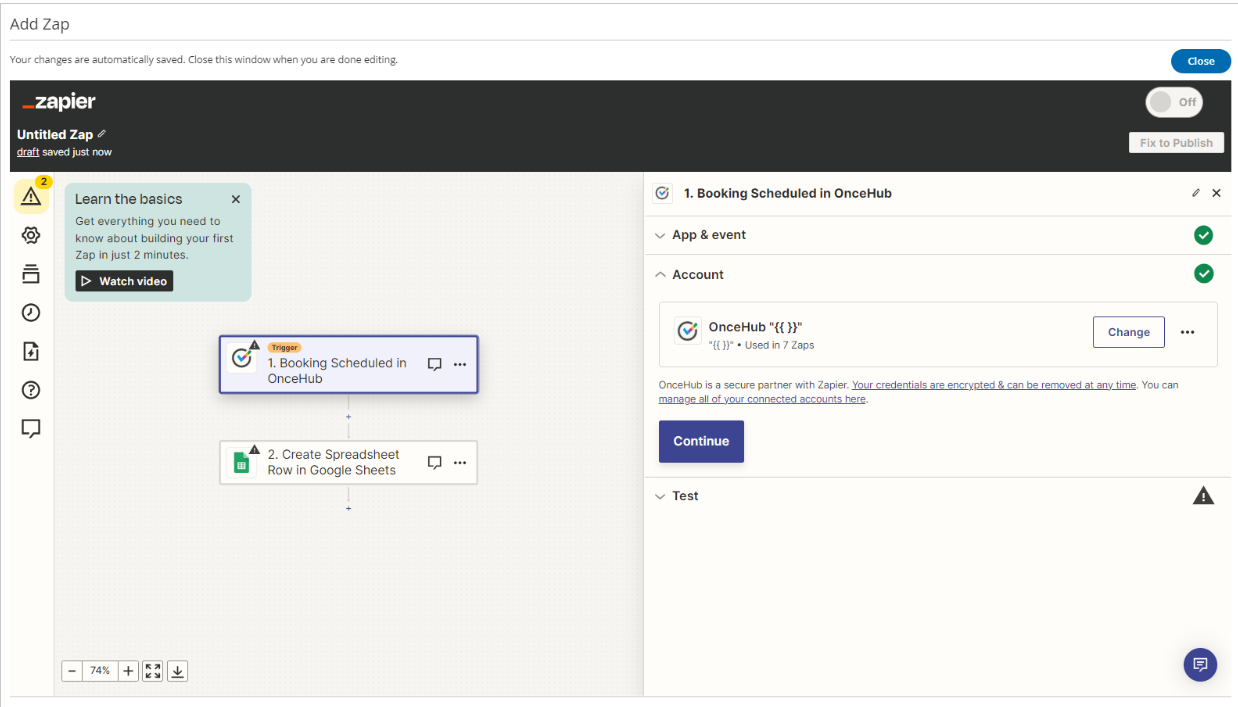


Figure 4: The Zap editor

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).

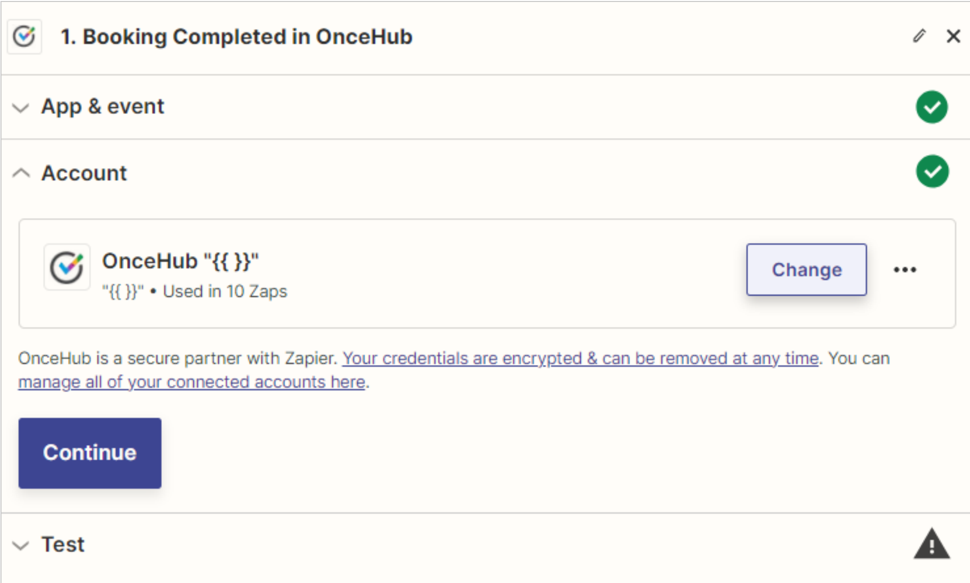


Figure 5: Selecting your OnceHub account

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**.

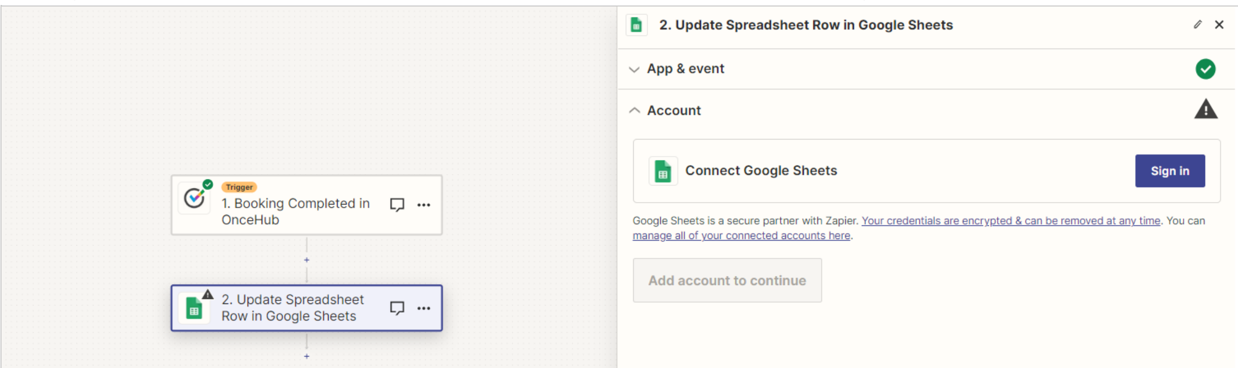


Figure 7: Selecting an account for the Action app

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.

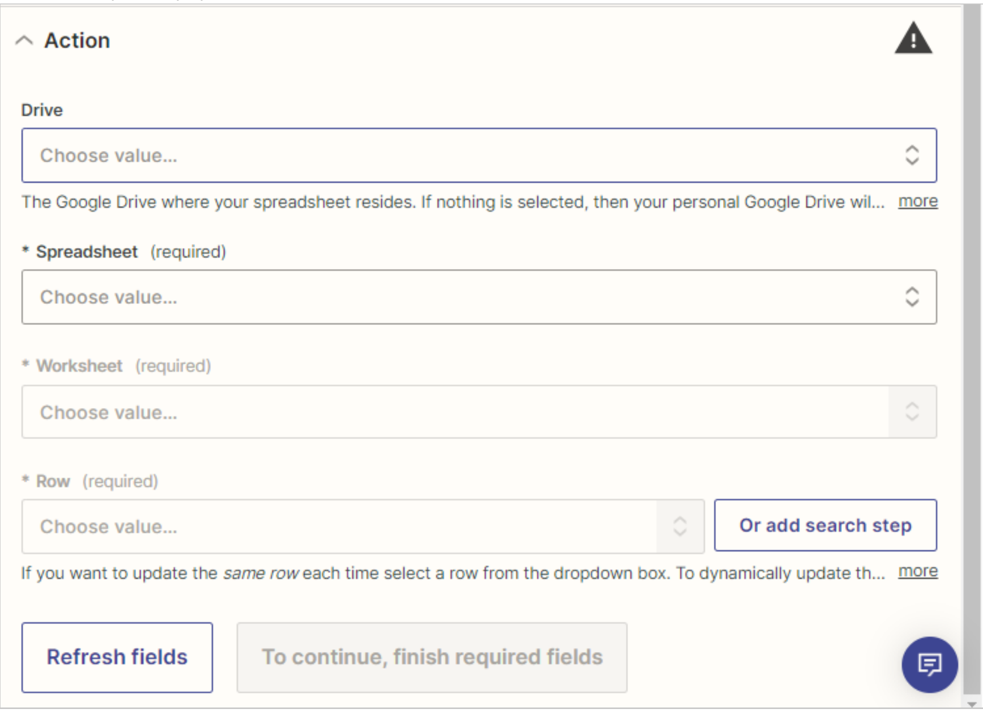


Figure 8: Filling in the Action fields

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).

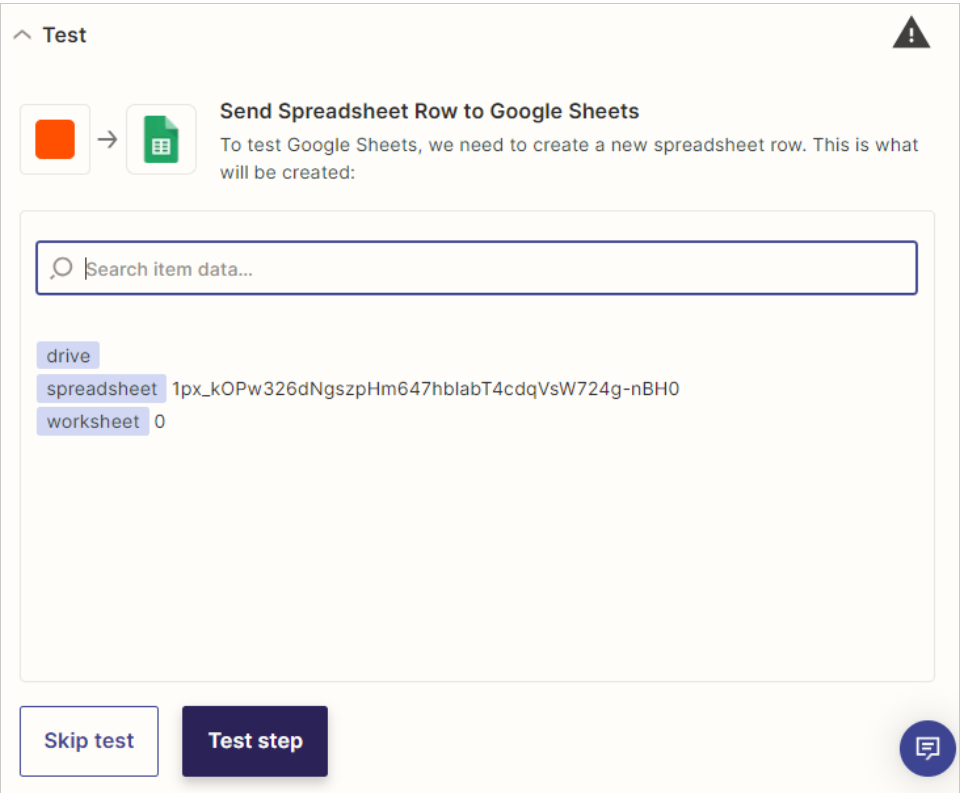


Figure 9: Testing the Action step

15. Publish your Zap (see Figure 10).

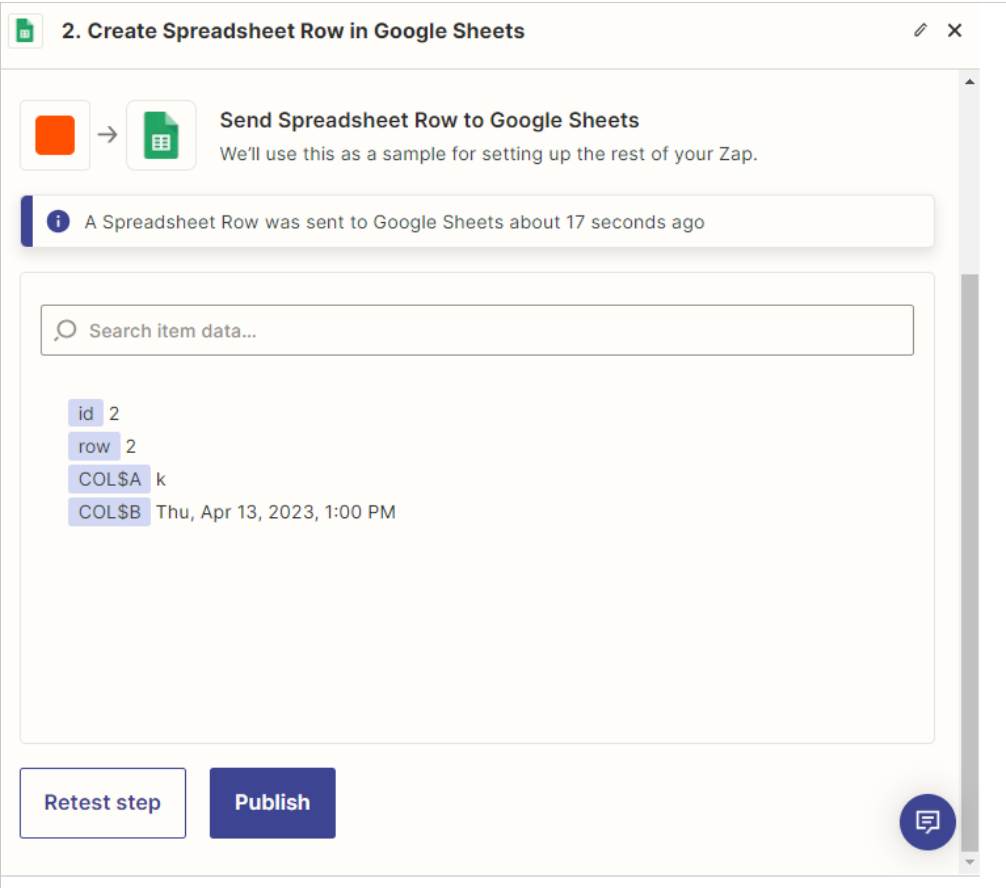


Figure 10: Publishing your Zap

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*).

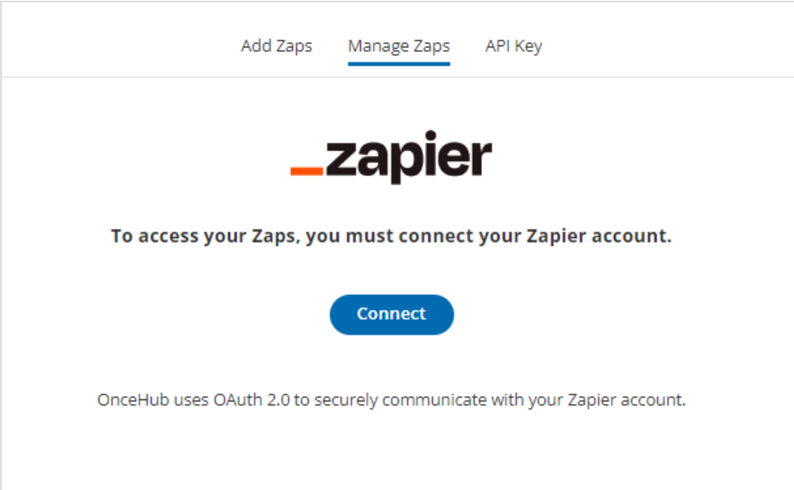


*Figure 1: The **Manage Zaps** tab*

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.

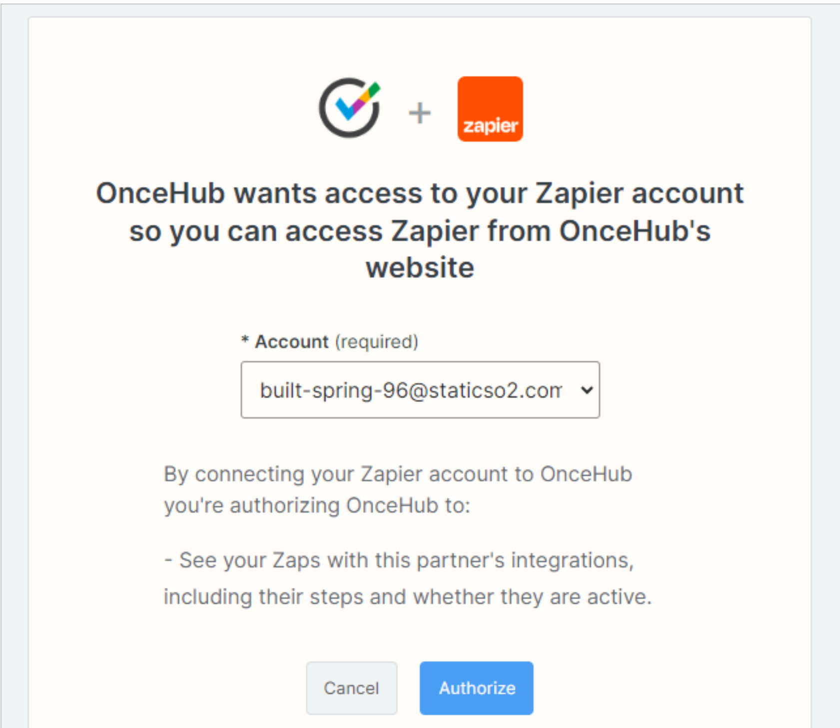


Figure 2: Zapier consent screen

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.

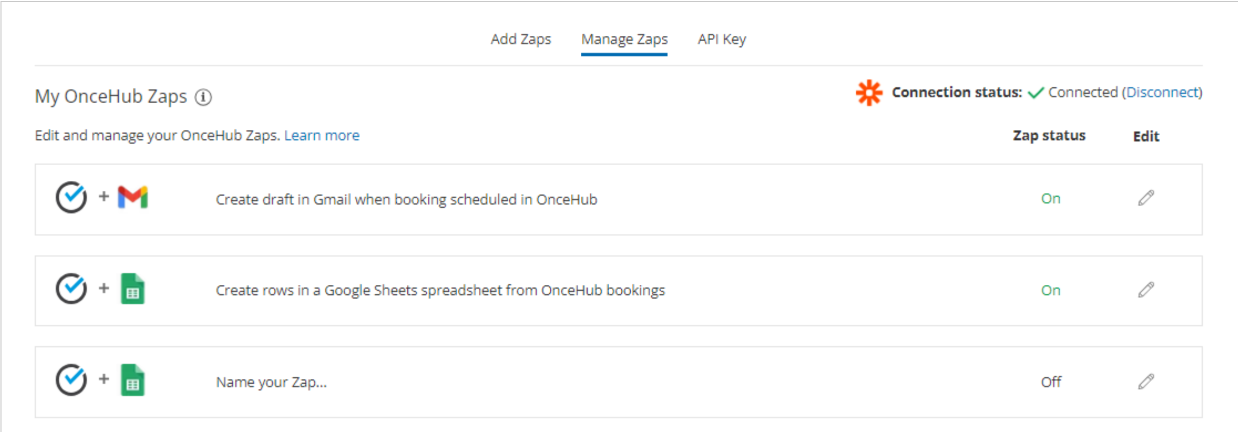


Figure 3: Your OnceHub Zaps

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.

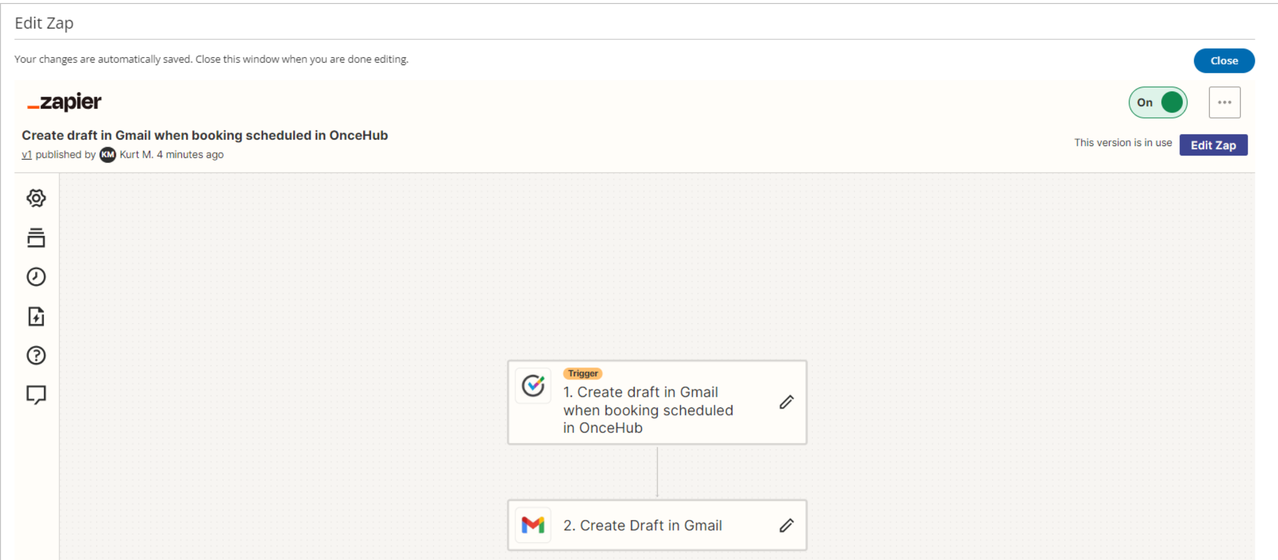


Figure 4: The Zap Editor from within OnceHub

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.

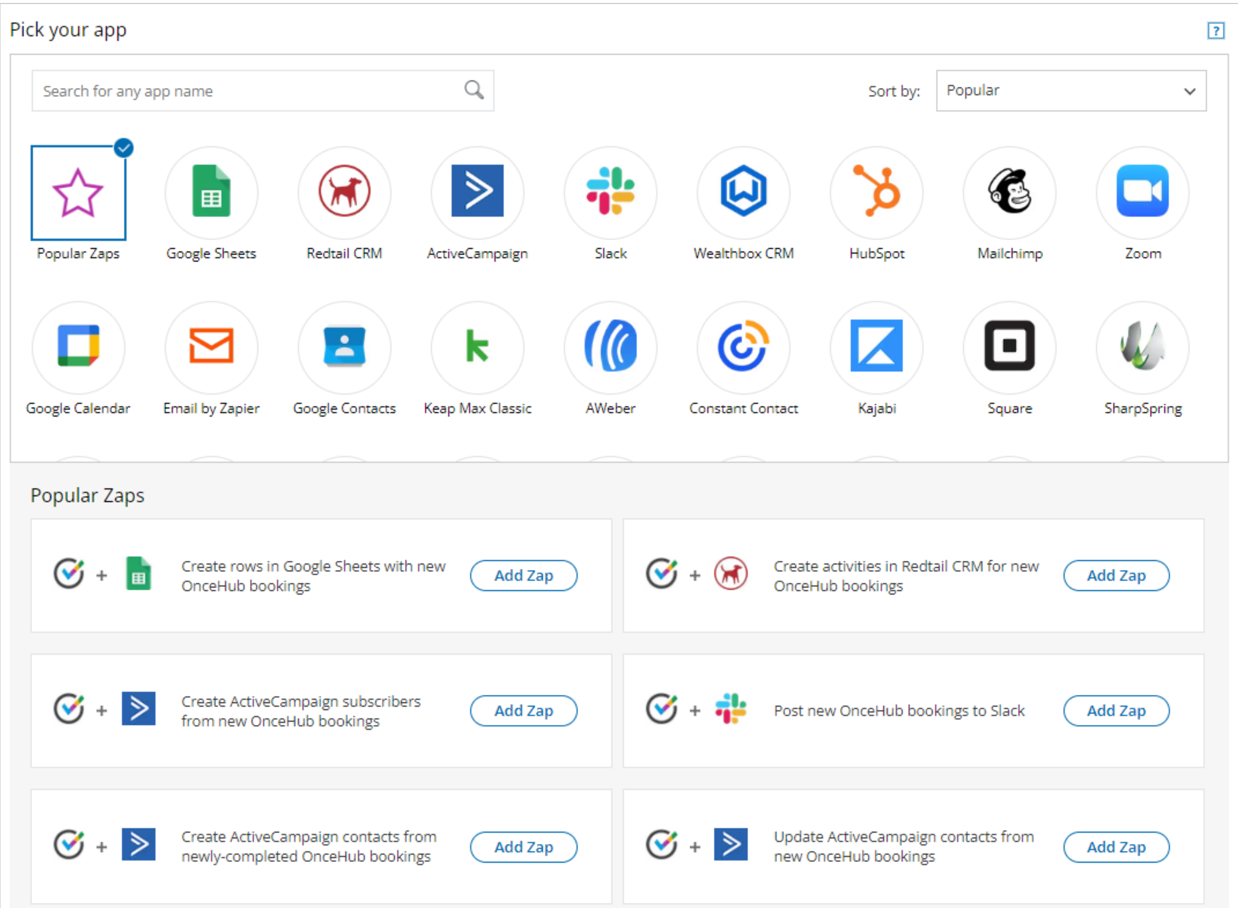


Figure 1: Add Zaps within OnceHub

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.

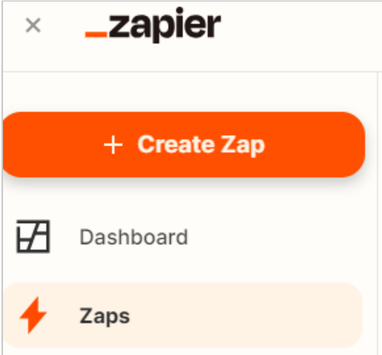


*Figure 2: Click **Create Zap** to create a Zap from scratch*

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).

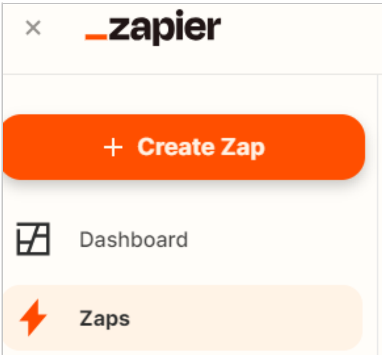


Figure 1: Click the Create Zap button

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).

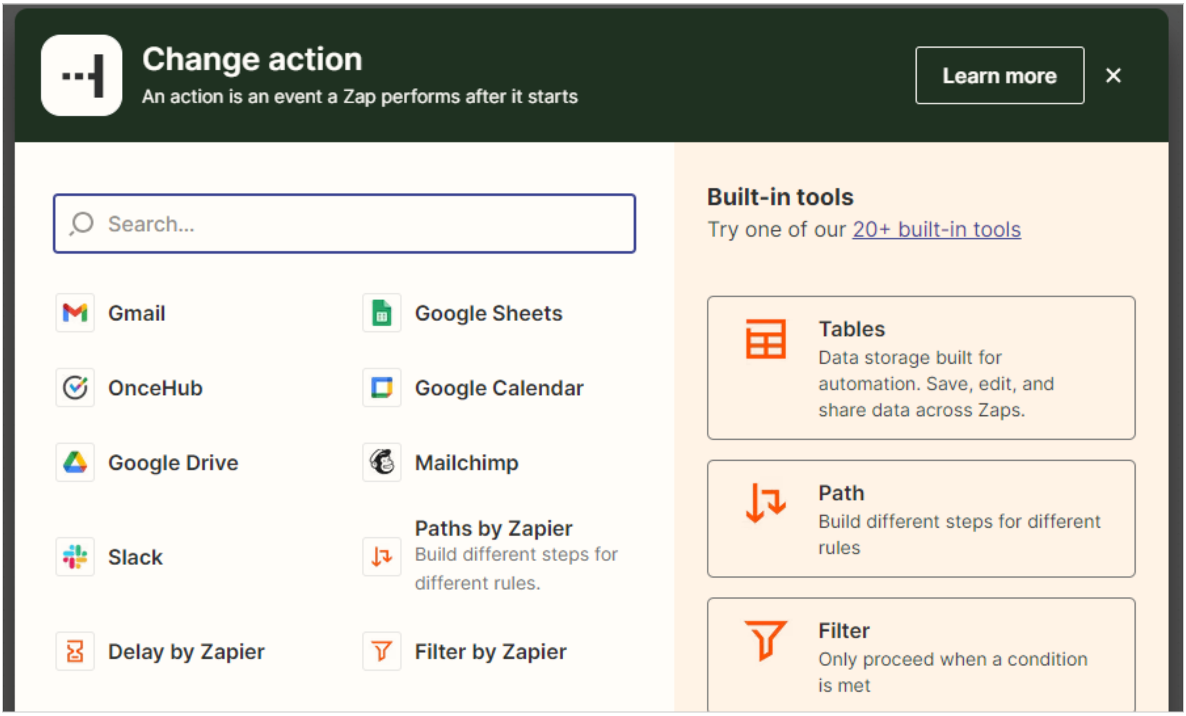


Figure 3: Choose an Action App

11. Select the Action you want to occur when the Zap is triggered and click **Continue** (see Figure 4).

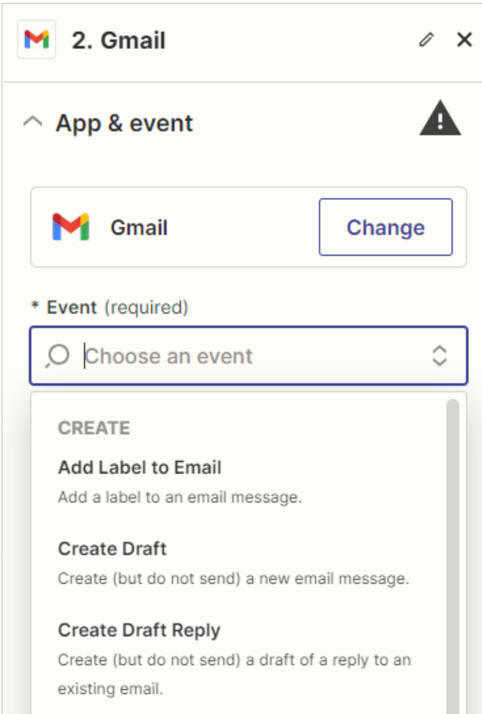


Figure 4: Select the Action

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).

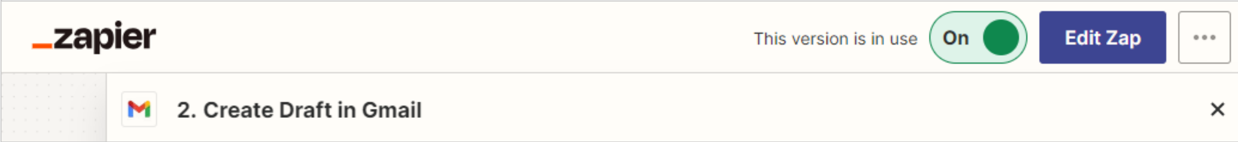


Figure 5: Editing/publishing your Zap

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).

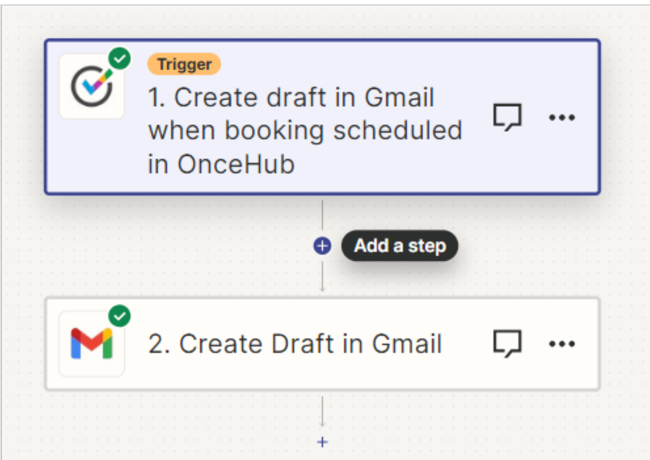


Figure 1: Add a Filter step

3. Click on the **Filter** button to add the Filter (see Figure 2).

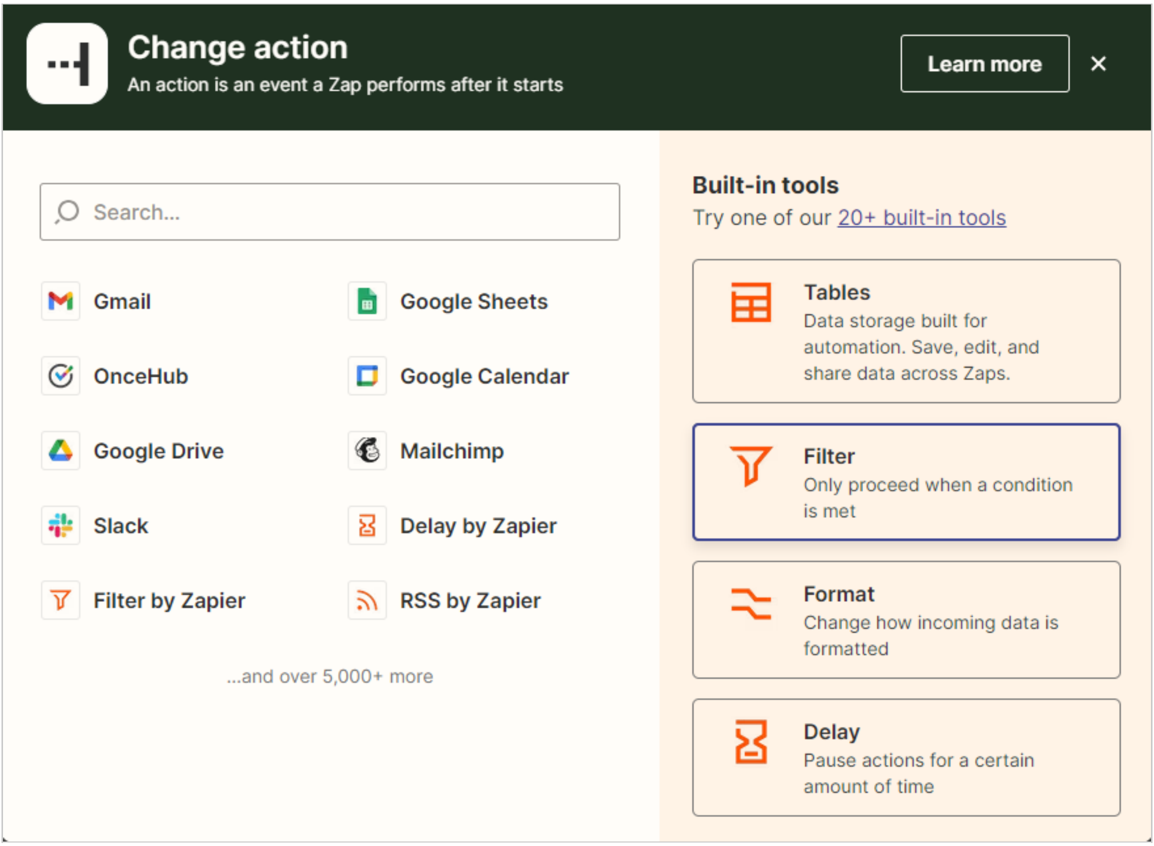


Figure 2: Click on the **Filter** button

Click **Continue** (see Figure 3).

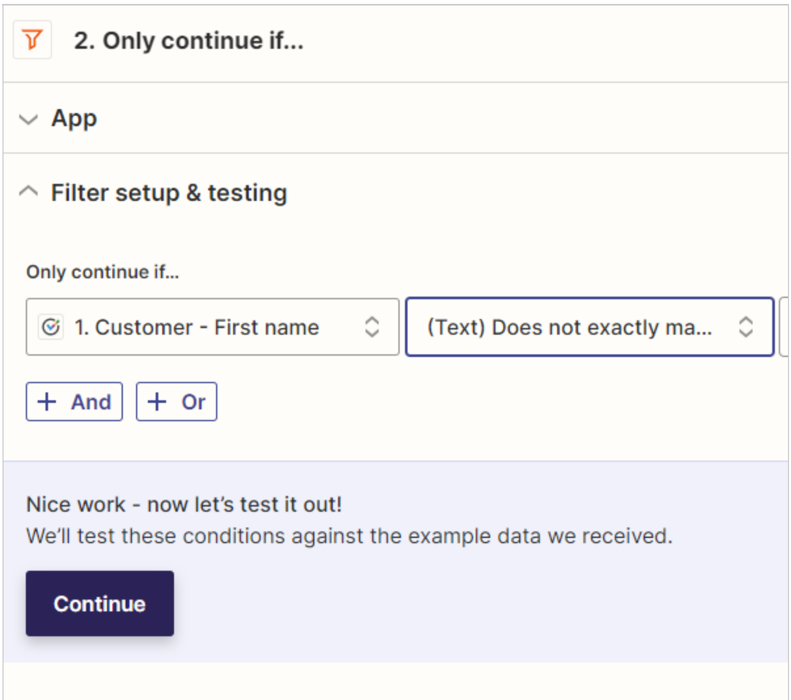


*Figure 3: Click **Save + Continue***

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).

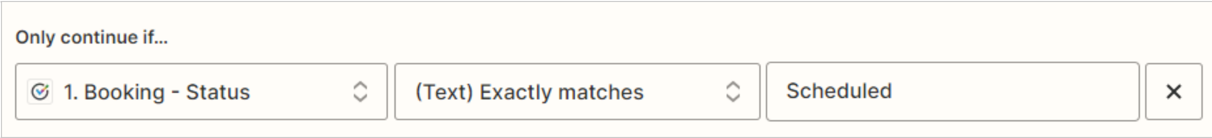


Figure 4: Example

> **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).

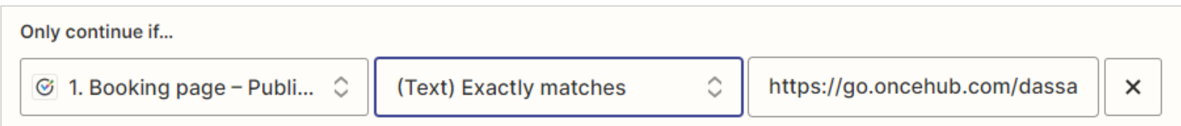


Figure 6: Filter setup

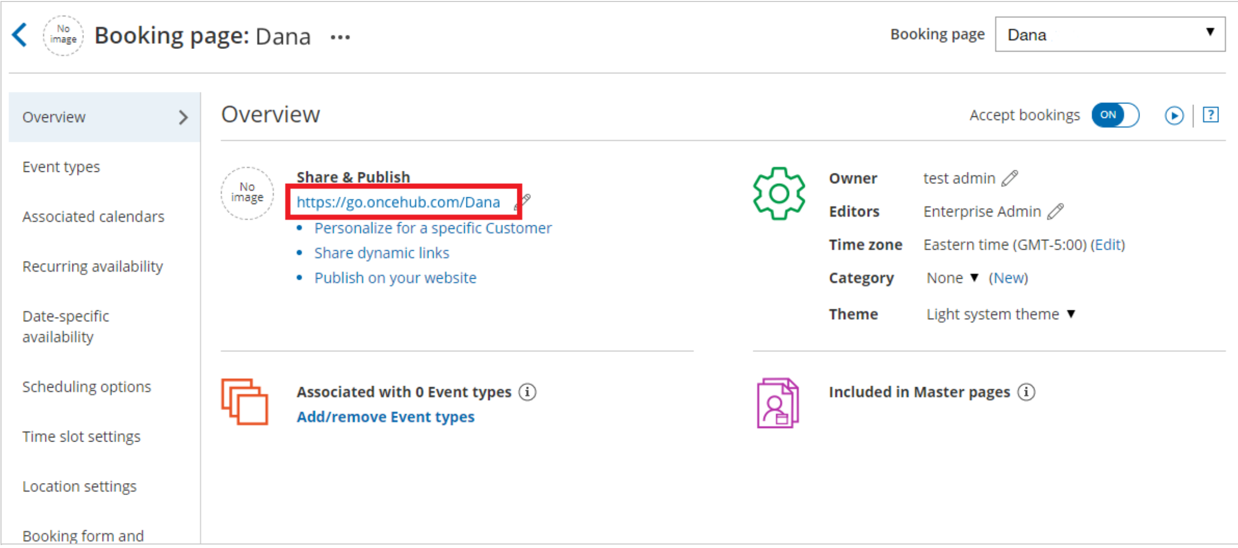


Figure 7: Overview section in the Booking page settings

OnceHub fields and triggers available in Zapier [Classic]

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
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

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
Customer - First name	X	X	X	X	X	X	X

Field name in Zapier	Scheduled	Rescheduled	Canceled	Canceled (Rescheduled)	Completed	No-Show	Booking Lifecycle Event
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
Event type - Category	X	X	X	X	X	X	X

Field name in Zapier	Scheduled	Rescheduled	Canceled	Canceled (Rescheduled)	Completed	No-Show	Booking Lifecycle Event
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,

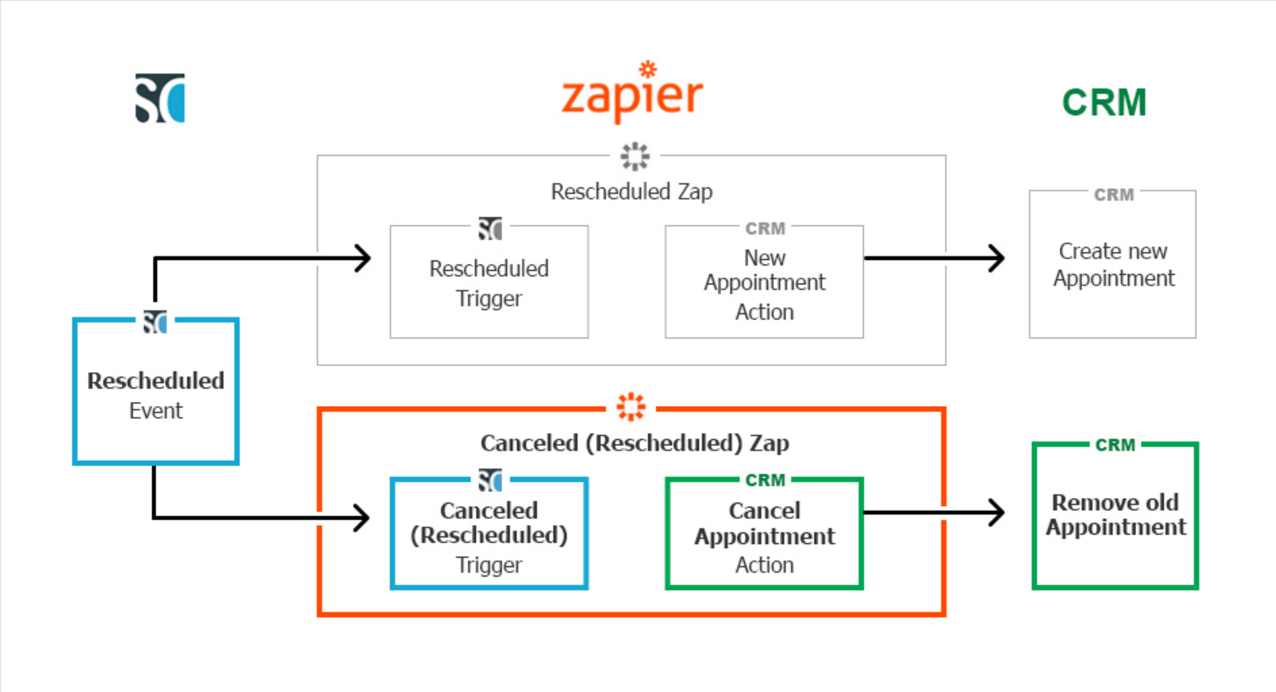
the **Canceled Booking (Rescheduled)** trigger is fired instantly as the original booking is no longer valid. The **Reschedule Booking** trigger is fired only after the Customer had rescheduled the booking. Below is a table outlining the triggers and attributes used in this scenario.

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

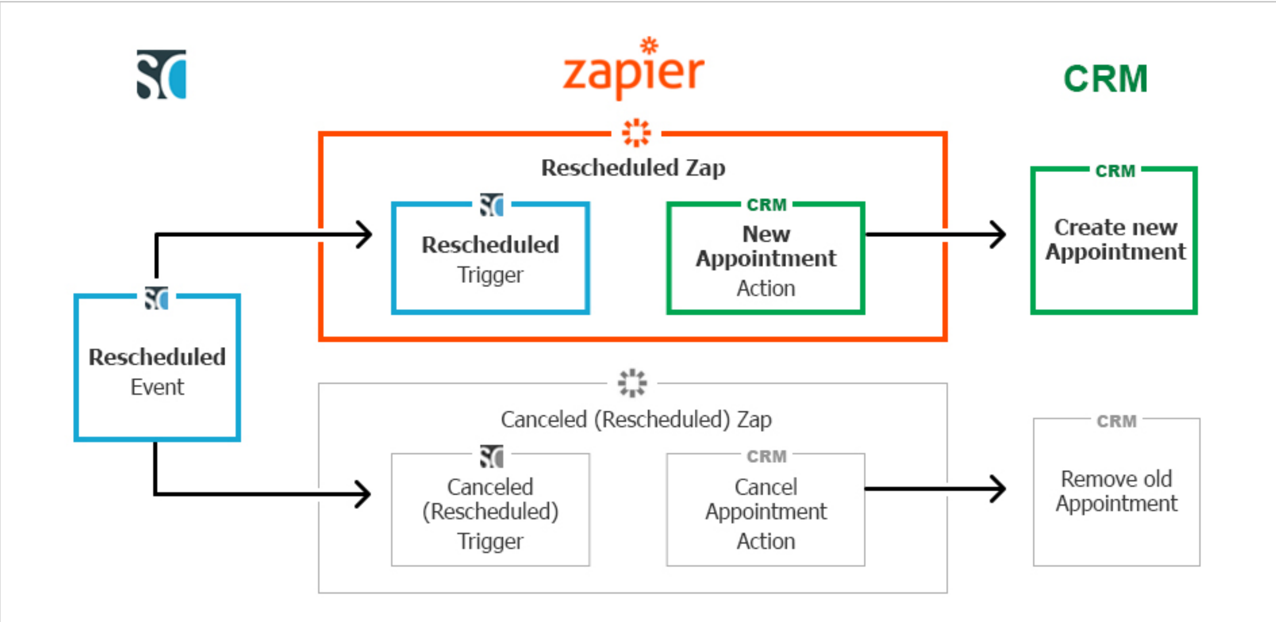
4. **User reschedules from a connected Google Calendar or Outlook Calendar.**
   When the setting to Changing the time in Google updates the booking in OnceHub is enabled, moving events in your calendar also updates the event in OnceHub. The **Rescheduled Booking** trigger is fired, when the User changes 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.

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

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.

Custom integrations with the OnceHub API [Classic]

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**

A User is not receiving SMS notifications [Classic]

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**.

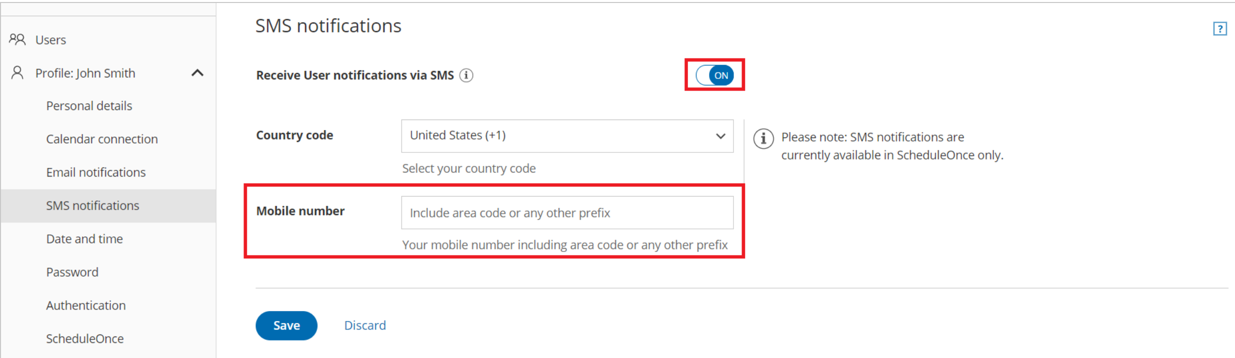


Figure 3: SMS notifications section

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.

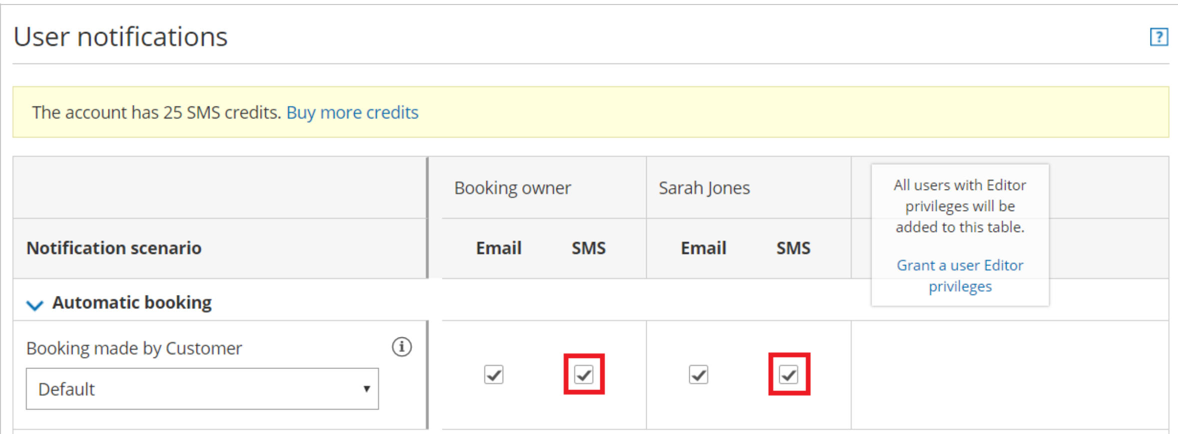


Figure 2: User notifications section

[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).

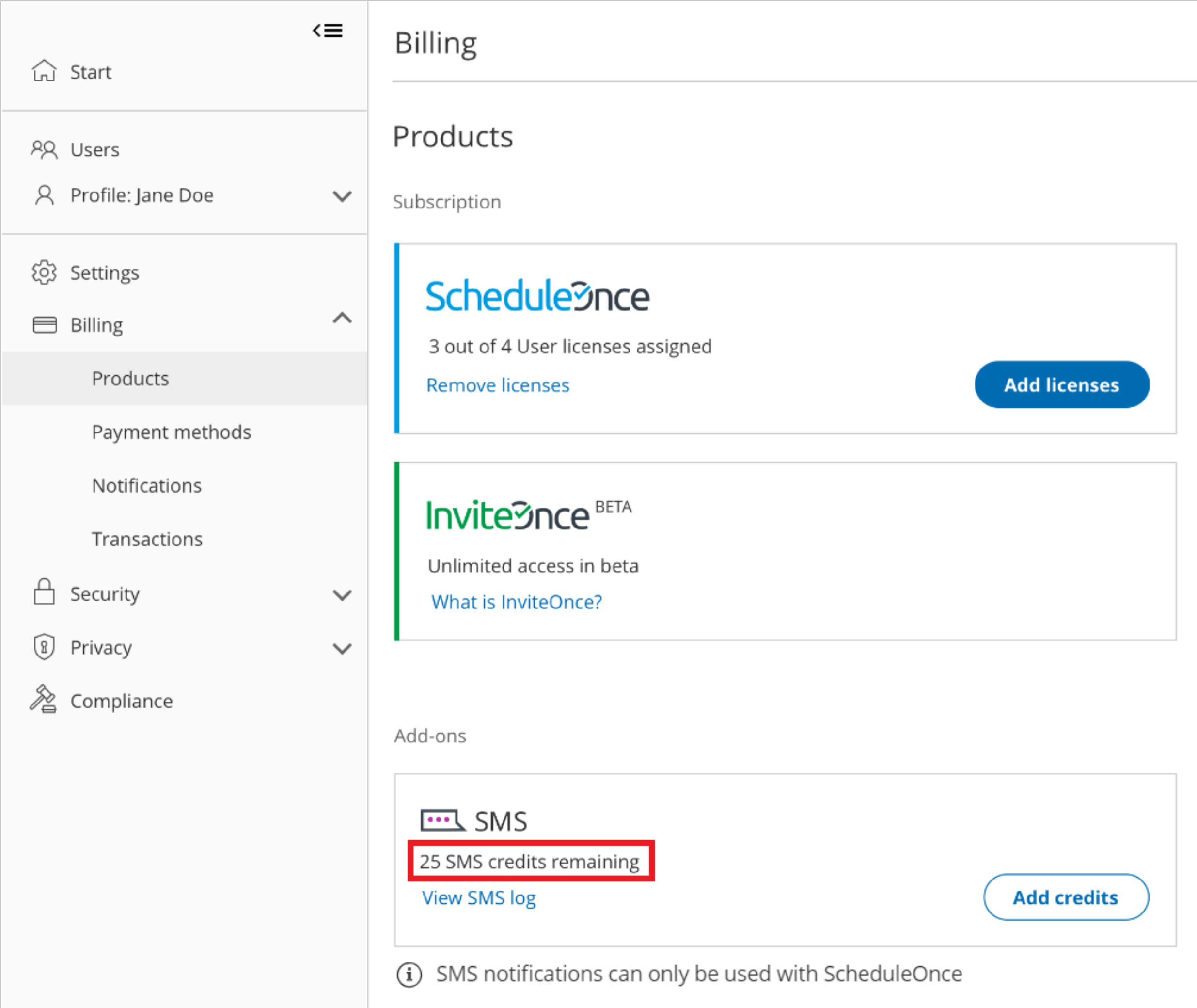


Figure 1: SMS credits

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.

A User is not receiving email notifications [Classic]

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).

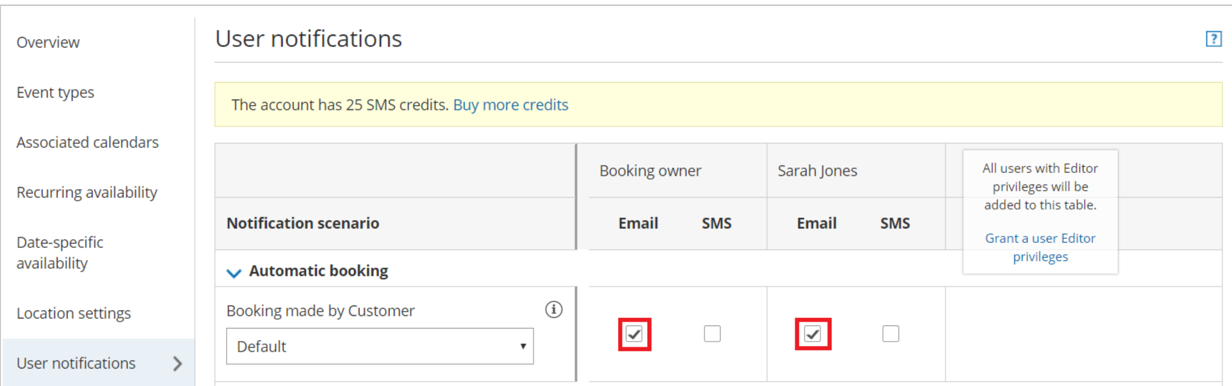


Figure 1: User notifications section

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).

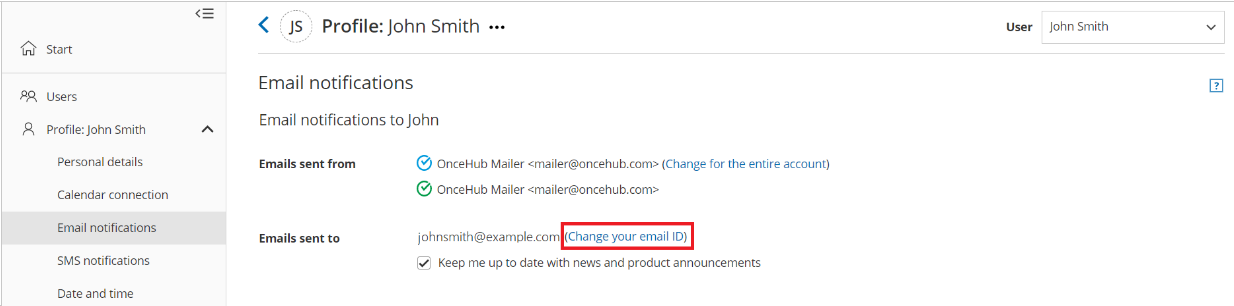


Figure 2: Email notifications section

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.

Google Calendar connection issues [Classic]

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).

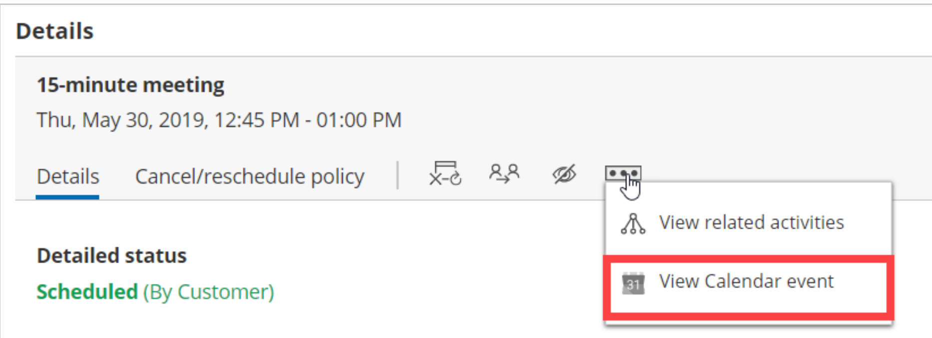


Figure 1: View Calendar event

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".

A Customer is not receiving SMS notifications [Classic]

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).

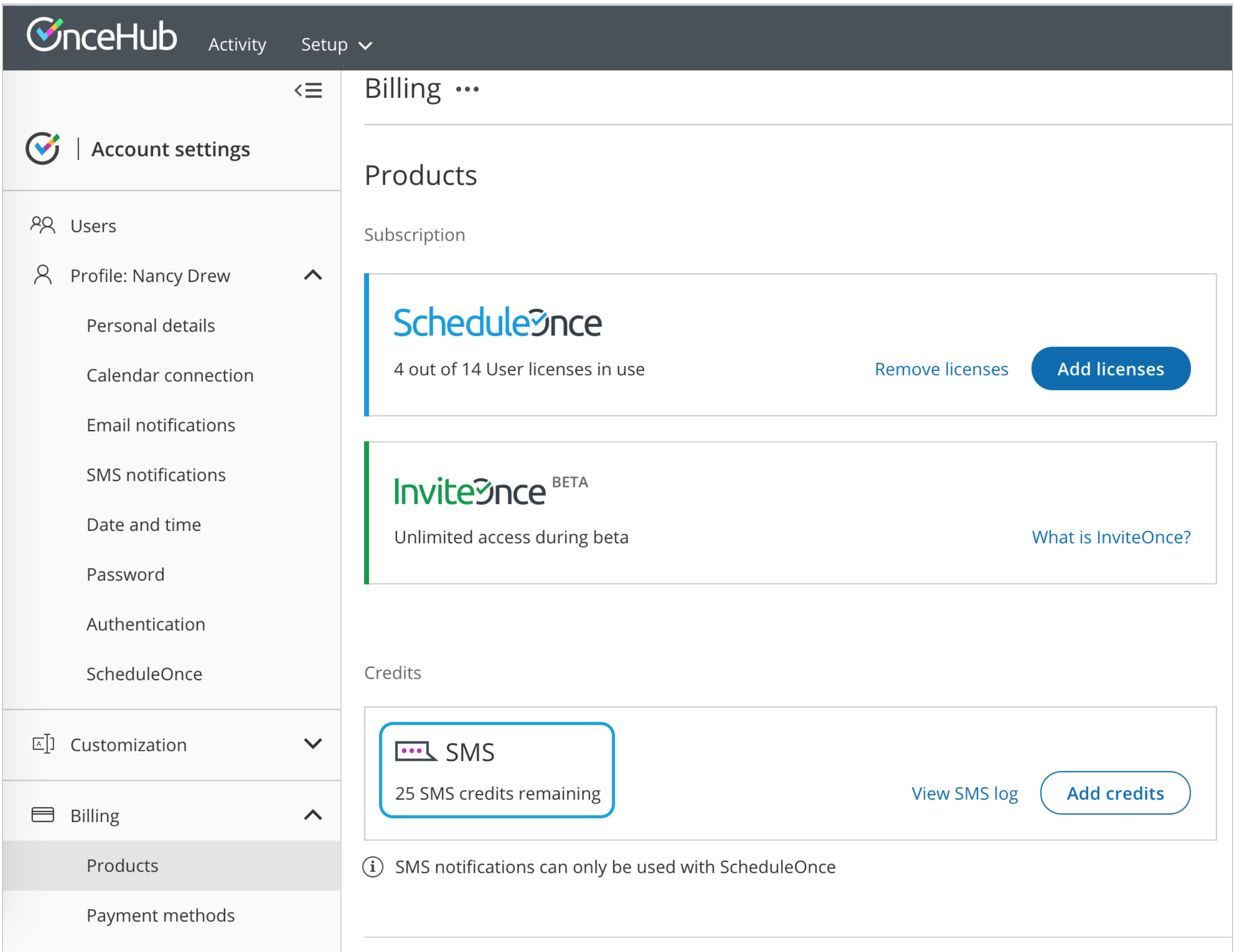


Figure 1: SMS Credits

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).

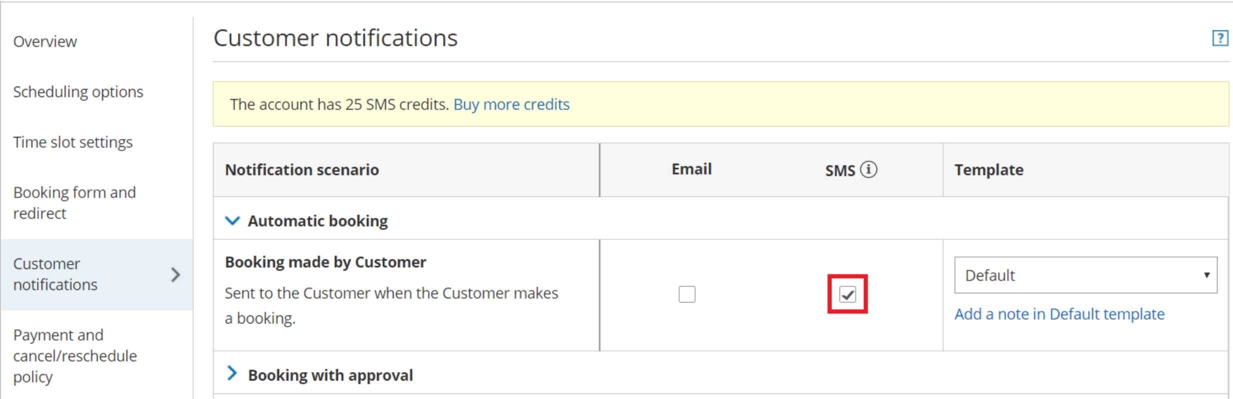


Figure 2: Customer notifications section

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).

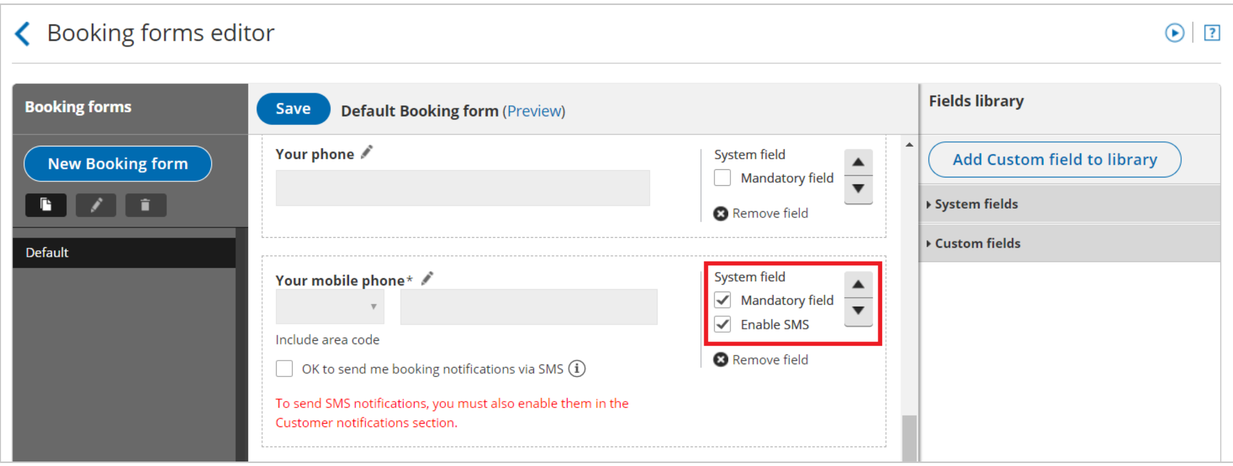


Figure 3: Booking forms editor

> **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 Booking 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.

Exchange/Outlook Calendar connection issues [Classic]

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).

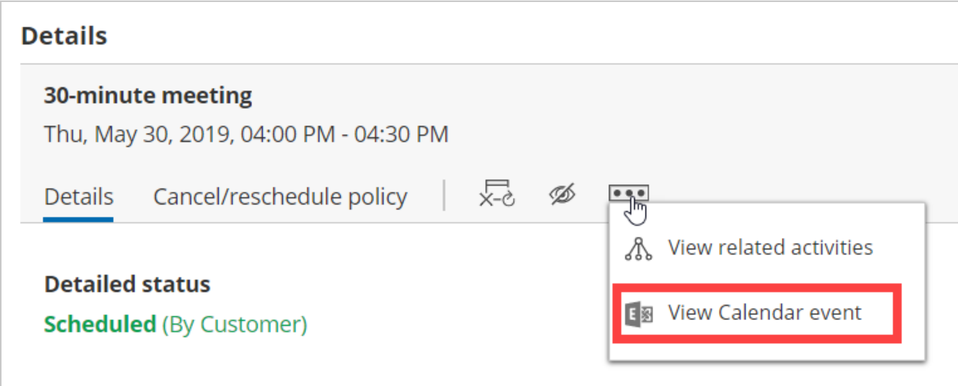


Figure 1: View Calendar event

Other issues

Contact OnceHub support if you experience other issues.

iCloud Calendar connection issues [Classic]

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).

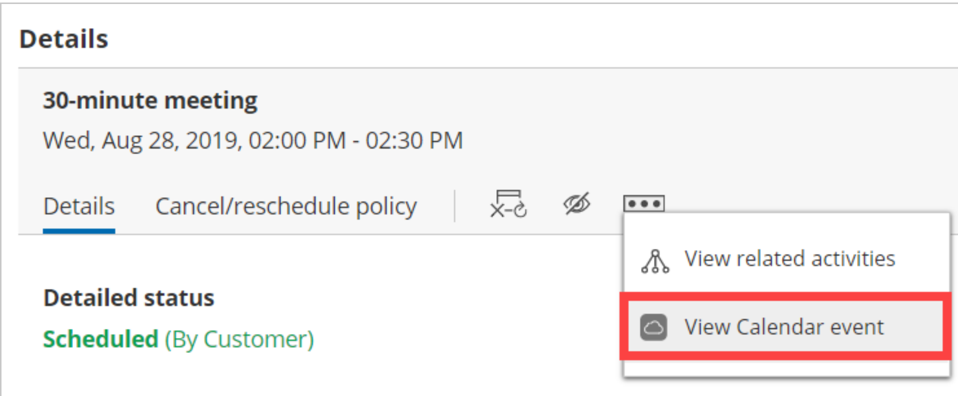


Figure 1: View Calendar event

Outlook Calendar: Events not showing in the expected time zone [Classic]

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. In the **Overview** section, select the new time zone and save.

- **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)**:**

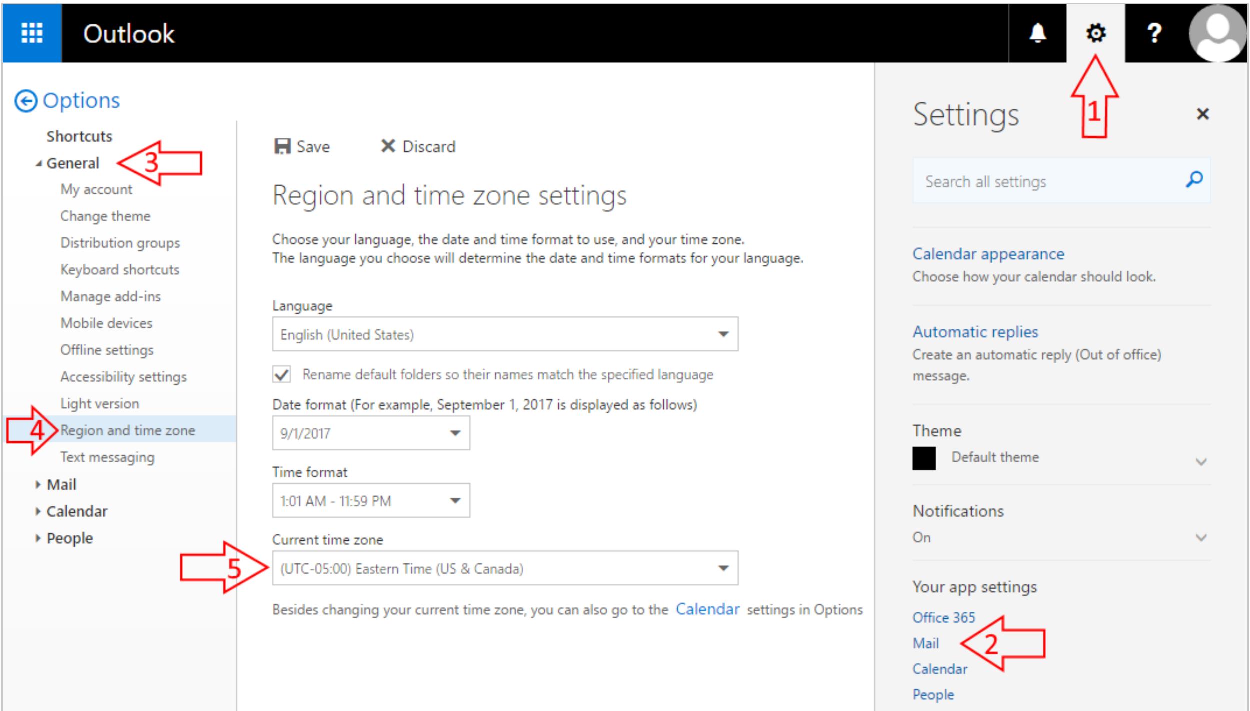


Figure 2: Outlook calendar region and time zone section

  - Click **settings icon**.
  - Click **Mail**.
  - Click **General**.
  - Click **Region and time zone**.
  - Set **your time zone**.

'No Times Available' Troubleshooting [Classic]

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).

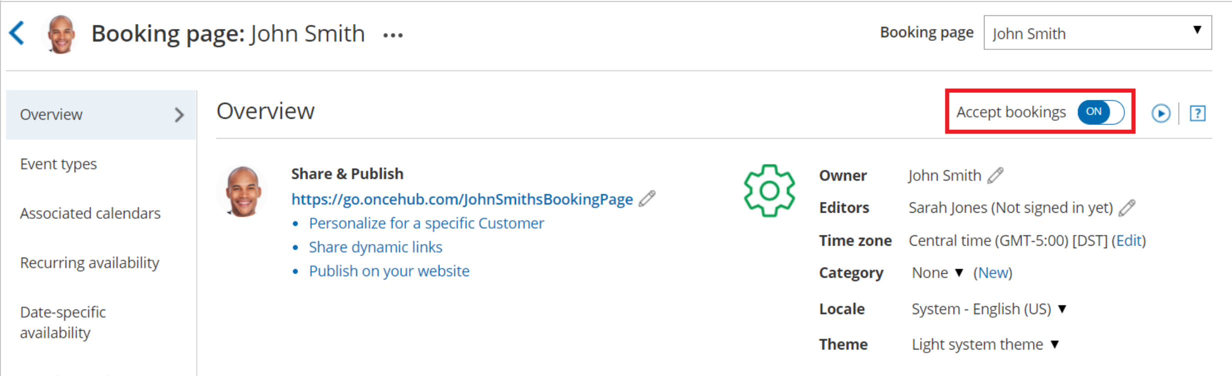


Figure 1: Booking page Overview section

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).

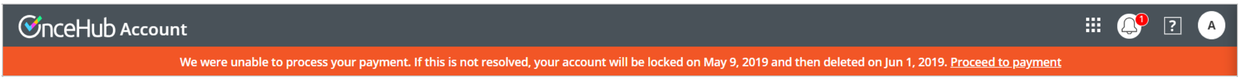


Figure 2: Payment failure notice

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.

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.

Microsoft 365 Calendar via OAuth 2.0 connection issues [Classic]

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).

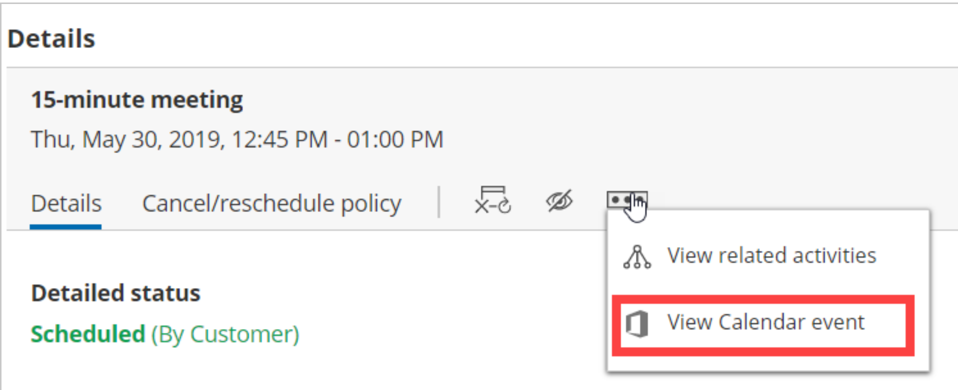


Figure 1: View Calendar event

Domain Email Connection Issues [Classic]

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

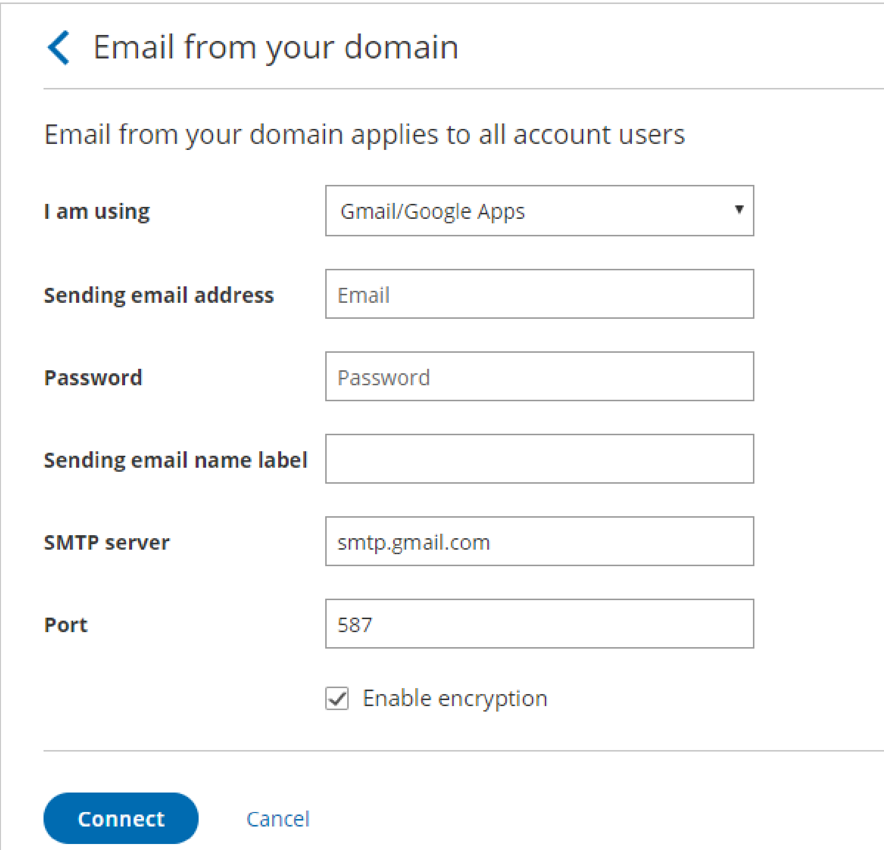


Figure 1: Connecting Email from your domain

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.

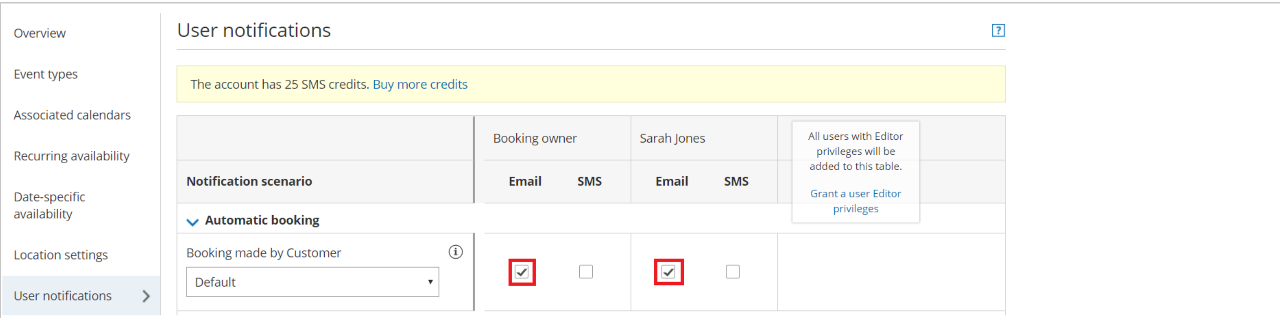


Figure 2: User notifications section

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).

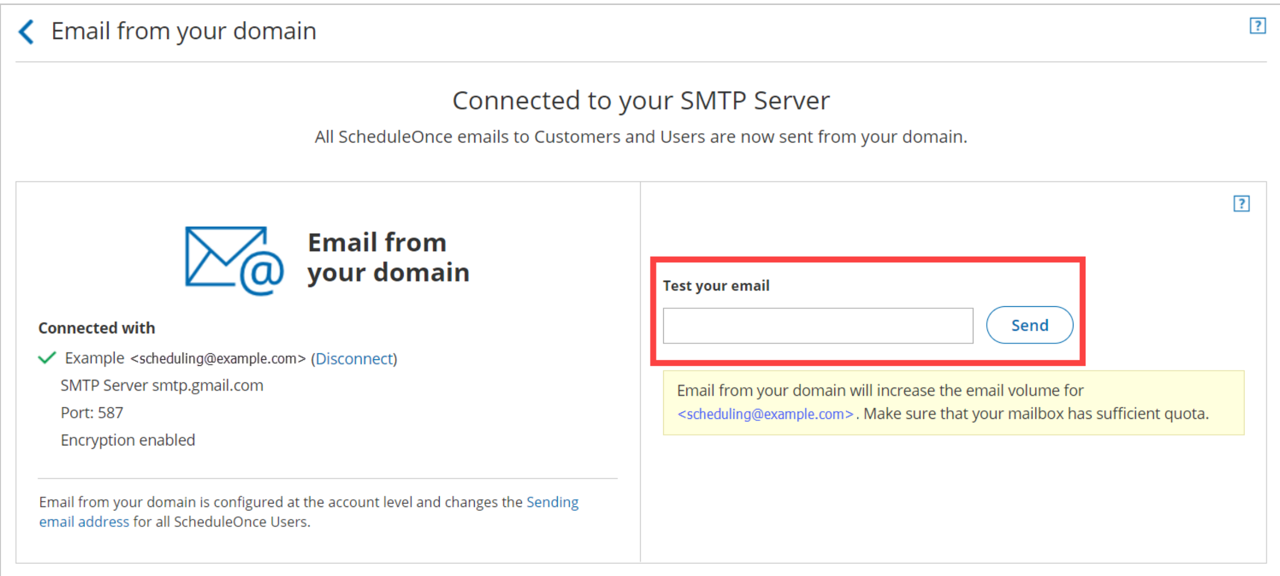


Figure 3: Email from your domain

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.

Busy times not blocking availability [Classic]

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.

Connection Error: Email from Your Domain with Google Server [Classic]

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

Payment integration issues [Classic]

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.

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 connector issues [Classic]

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).

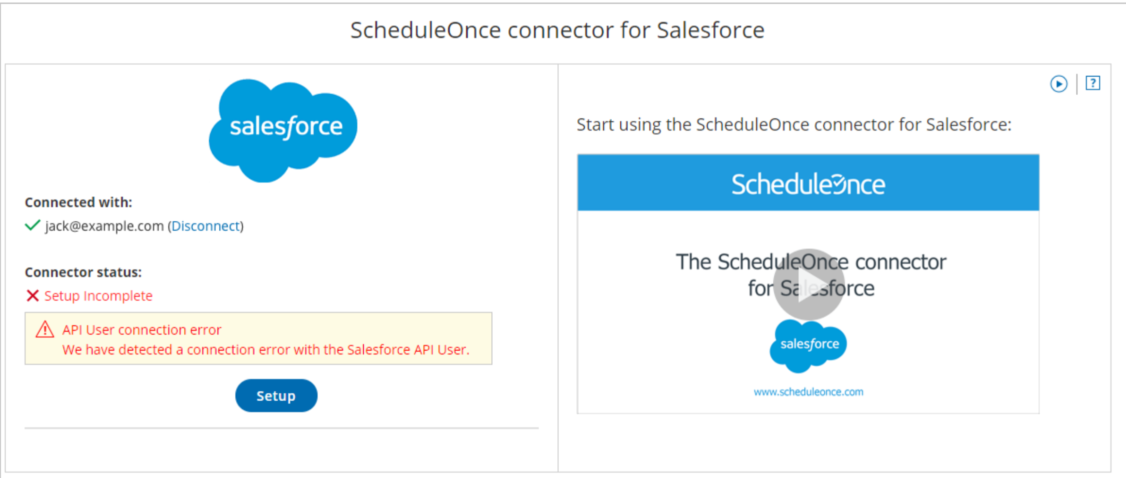


Figure 1: Salesforce API User Disconnected

2. Click the **Reconnect the API User** button (Figure 2).

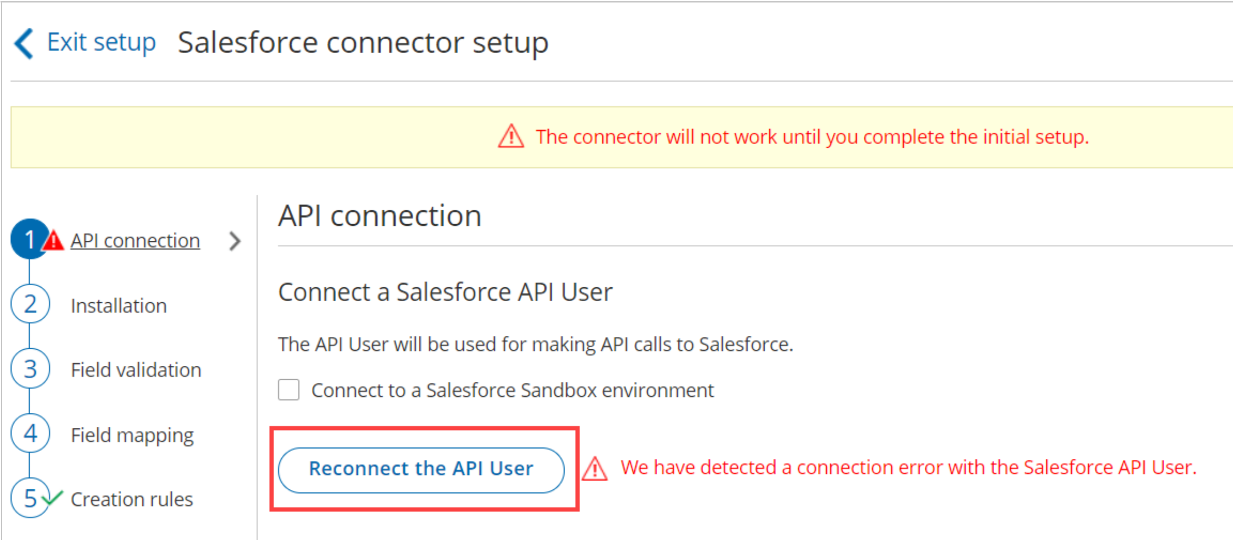


Figure 2: Reconnect the API User

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 Integration issues [Classic]

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

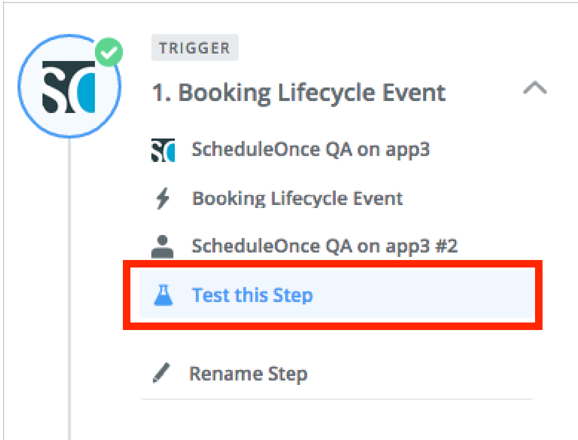
1. Select your profile picture or initials in the top right-hand corner → **Profile settings** → **Zapier**.
2. In the **Manage Zaps** tab, find the specific Zap and click the pencil icon to open the Zap Editor.
3. 

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.

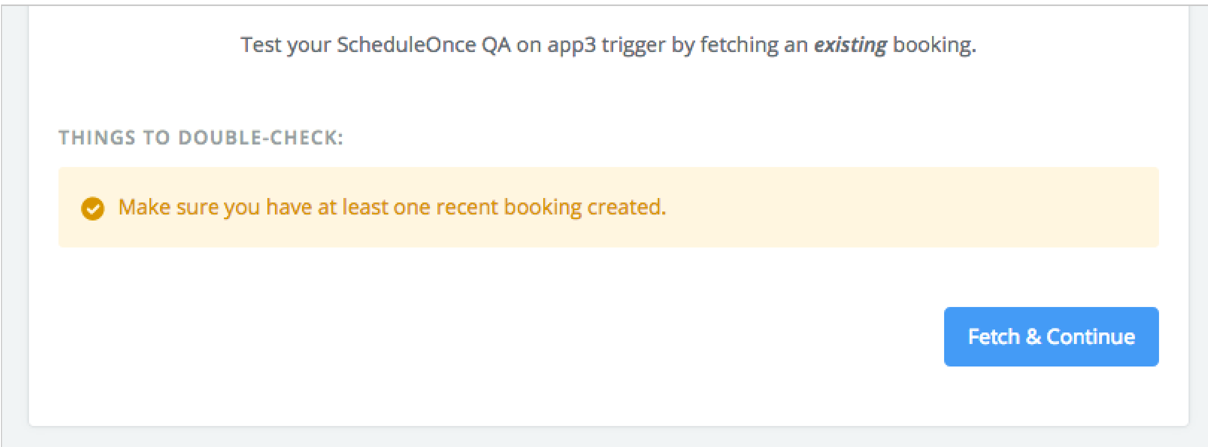


Figure 2: Fetch data

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.

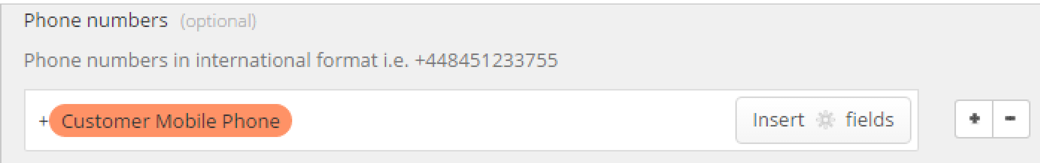


*Figure 3: Mapping **Customer - Mobile phone** field in Zapier*

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.

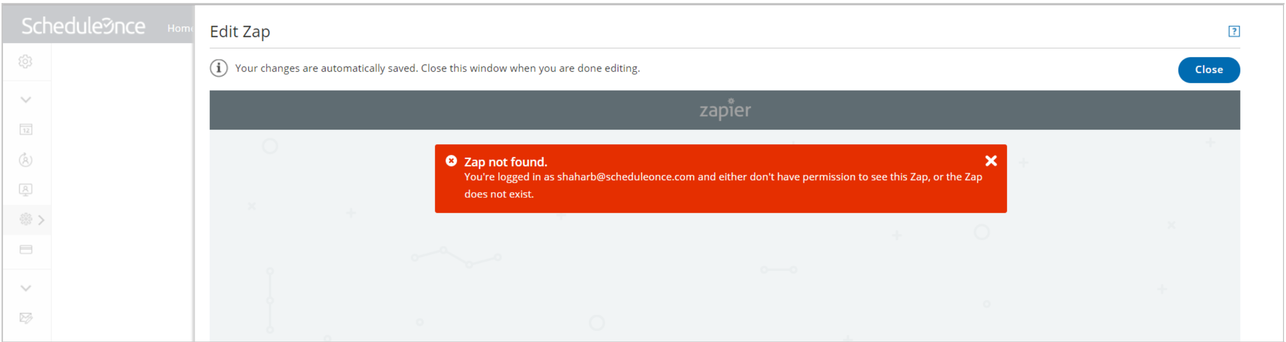


Figure 4: Zap not found

Introduction to Chatbots

Chatbots in OnceHub streamline the qualification process by asking your guests tailored questions and directing them to specific actions based on their responses.

What is a Chatbot?

A Chatbot helps you qualify guests by guiding them through customized paths based on their answers to specific questions. These paths, or "routes," can lead to various outcomes, such as:

- Scheduling a meeting directly within the bot.
- Connecting with a live sales agent via chat.
- Qualifying leads for immediate live video calls.

The flexibility of Chatbots ensures that your guests receive a tailored experience that aligns with their needs, helping you nurture valuable leads more effectively.

Key Benefits of Using Chatbots

- **Efficient Lead Qualification:** Instantly identify and qualify leads through conditional routing.
- **Engage High-Value Leads:** Offer live engagement options directly to qualified leads within the bot itself, streamlining the conversion process.
- **Customized Data Collection:** Tailor the information you gather to align with the type of meetings or interactions your business offers.
- **AI Conversation:** AI conversations accelerate guest engagement, offering a more satisfying experience than standard chatbots.

Core Features of Chatbots

Chatbots come equipped with powerful features designed for flexibility and effectiveness:

- **Conditional Routing:** Direct guests to the next appropriate step based on their bot responses.
- **Customizable Bots:** Collect only the information you need for better qualification and reduced friction.
- **In-Bot Scheduling and Live engagements:** Enable guests to set up meetings, initiate a chat or offer a video call, all without leaving the bot.
- **AI Conversation:** Allow for a more dynamic experience by making use of AI to serve your guests.
- **Standalone Page Sharing:** Provide guests with a direct link to access your bot.
- **Website Embedding:** Easily integrate the bot into your website for a smoother customer journey.
- **Automatic Reach Out:** Target website visitors with chatbots based on their needs.

Adding Questions to Your Chatbot

The Flow Builder for Chatbots is a flexible tool designed to enhance the user experience by allowing you to add questions to gather information, set conditional routing based on guest responses, and set actions for the bot to take.

In this article we will focus on the various questions that you can add to your bot within the Flow Builder.

How to Access the Flow Builder

1. Click on **Chatbots** in the left-hand navigation menu.
2. Select the Chatbot you want to edit.

Once here you can drag and drop questions from the **Add Interaction** pane on the right into your Chatbot.

Types of Questions Available

The Flow Builder provides a variety of question types to help you collect and qualify information. Below are the available question types and their purposes:

- **Single select:** Guests choose one answer from multiple options. Ideal for straightforward selection questions.
- **Free text:** Allow guests to provide written responses in their own words. Useful for open-ended questions.
- **Email:** Collect email addresses from your guests. Perfect for contact information needs.
- **Phone:** Request your guest's phone number for outreach purposes.
- **Multi select:** Guests can select multiple options. Great for surveys or multi-choice scenarios.
- **Number:** Gather numerical values. This works well for quantities or measurements.
- **Date & time:** Guests can enter date and time values. Great for capturing event timing details.
- **Date:** Allow guests to select a date. Great for capturing information such as date of birth.
- **Time:** Allow the guest to select a time as a response.

Saving Guest Responses to OnceHub Contact Fields

Once responses are collected, you have the option to save them to existing Contact fields within OnceHub. This feature is particularly useful for sending guest information to third-party integrations, such as CRM systems.

To learn more about Contacts, please check out our **Contact Fields Library article**.

Saving a Response to a Contact Field

1. Select the Question you want to save to a Contact.
2. Select **In the conversation and as a contact field** in the Interaction Pane on the right.
3. Select the field from the **Contact Field** dropdown.
4. Click **Save**.

What’s Next?

After adding your questions, consider configuring routing settings to direct interactions based on guest responses. Check out our **Routing your Interactions article** for more information.

Adding Messages to Your Chatbot

The Flow Builder for Chatbots is a flexible tool designed to enhance the user experience by allowing you to add messages to provide information, share documents, and more with your guests while they are interacting with the bot.

In this article we will focus on the various messages that you can add to your bot within the Flow Builder.

How to Access the Flow Builder

1. Click on **Chatbots** in the left-hand navigation menu.
2. Select the Chatbot you want to edit.

Once here you can drag and drop messages from the **Add Interaction** pane on the right into your Chatbot.

Types of Messages Available

The Flow Builder provides a variety of message types to help you collect and qualify information. Below are the available question types and their purposes:

- **Text message:** This message displays simple, plain text within the bot.
- **URL:** Add a clickable link that guests can use to access webpages or resources.
- **Image:** Insert an image to visually engage guests or share visual guides.
- **Video:** Add a video for guests to watch. Note that the maximum file size is 250 MB.
- **Document:** Upload a document, such as a PDF, for guests to download.

Routing Your Interactions in Chatbots

The Flow Builder for Chatbots is a flexible tool designed to enhance the user experience by allowing you to add questions to gather information, set conditional routing based on guest responses, and set actions for the bot to take.

This article focuses on the routing you can configure for your bot within the Flow Builder.

How to Access the Flow Builder

1. Click on **Chatbots** in the left-hand navigation menu.
2. Select the bot you want to edit.

Once here you can click on the Interaction you want to define routing for. Then, on the right-hand side of the screen you will see the **Routing pane**.

How does routing work?

Routing allows you to control the flow of guest interactions within your chatbot by determining what happens after each response. For every interaction, you can choose to:

- **Route to the next interaction in order:** Proceeds to the next interaction in sequential order.
- **Always route to a specific interaction:** Routes the guest to the specified Interaction, no matter their response.
- **Route to interactions based on rules:** Routes based on the guest’s responses and predefined rules.

Routing to Interactions Based on Rules

Using rules for routing enables you to create dynamic flows that adapt to the responses or data provided by your guests. Here's how to design effective rules:

What makes up a Rule?

Each rule comprises two core components:

1. **Conditions:** These are criteria that must be met to activate the rule. Conditions can be based on:
   - The guest’s response in the current interaction.
   - Responses from previous interactions.
   - Information stored in a contact field.
2. **Routing Action:** This determines the interaction to route the guest to when the conditions of the rule are met.

Using Multiple Rules

You can include multiple rules within a single interaction for a more nuanced routing process. The Chatbot will evaluate the rules in order, starting from the top. When a condition is met, the guest will be routed to the designated interaction for that rule.

If the top rule's conditions are not met, the Chatbot will proceed to test the next rule, working its way down the list until a condition is satisfied.

Note: Always use the **Otherwise** option at the bottom of the **Routing pane** as a fallback. This ensures that, if none of the specified rule conditions are met, the Chatbot will still guide the guest to a predefined interaction or endpoint.

Sharing Your Chatbot as a Standalone Page

You can easily share your Chatbot with customers by generating a unique link. The Chatbot will display on a standalone page that you can customize to align with your branding. Follow this guide to design and share your Chatbot page.

Design the Standalone Page

Use the Page Designer to create a visually appealing standalone page for your Chatbot using the steps below:

Navigating to the Page Designer

1. Click on **Chatbots** in the left-hand navigation menu.
2. Select the bot you want to design a standalone page for.
3. Click on the **Page Designer** tab at the top.

Designing the Page

The Page Designer provides a live preview (WYSIWYG editor), allowing you to see real-time updates for both desktop and mobile views as you design your page.

Here are the key customization options available:

- **Customize the URL:** Create a unique and easy-to-share URL for the page.
- **Branding Adjustments:** Match your brand's style by adjusting background, text, and button colors.
- **Add Visuals and Messaging:** Upload custom images, logos, and a personalized welcome message.
- **Incorporate Links:** Add helpful links in the footer or welcome message for navigation or valuable resources.
- **Social Media Integration:** Include clickable social media icons for platforms such as your website, X (formerly Twitter), YouTube, and others.

Once your design is complete, you can generate a sharable link by clicking **Share Your Page**.

Share your Chatbot as a Standalone Page

Navigating to the Chatbots lobby

1. Click on **Chatbots** in the left-hand navigation menu.

Sharing the link

1. Click on the **Share** button for the Chatbot you want to share as a page.
2. Click on **Copy & close** in the pop-up.
3. Paste the link wherever needed.

Building a chatbot

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.

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.

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**.

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.

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)

You can access your routing by selecting a specific interaction and clicking on 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.).

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.

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

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.

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.

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 in the top-right.

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

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).

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 Chatbots lobby using the left-hand menu.
2. Click on **Automatic reach out** icon in the top-right below the gear icon.
3. To build an audience, click on **Audiences** at the menu on the left.
4. Build out the targeting rules you want. You can customize these rules and add multiple flows to help with specific targeting.

You can create one or more rules for each audience you create, based on multiple parameters.

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.

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.

Sharing your chatbot

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.

Learn more about using targeted chatbots and automatic reach out here.

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**

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.

Creating a Chatbot

Creating a Chatbot in OnceHub is simple. You can start with a blank bot, duplicate an existing bot, or use a pre-designed template to get started.

Navigating to the Chatbots Lobby

1. Click on **Chatbots** in the left-hand navigation menu.

Create a New Blank Chatbot

If you prefer to design your Chatbot entirely from scratch, follow these steps:

Creating a Blank Chatbot

1. Click on **Create chatbot** in the top right of the Chatbots Lobby.
2. Click on **Start from scratch** in the top right.
3. Provide a name and select the Owner of the bot.

You are now ready to start creating your Chatbot. We recommend taking a look at our **Adding Questions to Your Routing Form article** to get started.

Create a New Chatbot from a Template

Templates can save you time by providing a pre-built structure that you can customize. If you prefer to start off with a template, follow these steps:

Creating a Chatbot using a Template

1. Click on **Create chatbot** in the top right of the Chatbots Lobby.
2. Select the template you wish to use.
3. Provide a name and select the Owner of the bot.

Your bot will be created based on the chosen template. Afterward, you can learn about customizing the questions by checking out our **Adding Questions to Your Routing Form article**.

Duplicate an Existing Chatbot

If you have an existing Chatbot you'd like to use as a starting point, you can duplicate it and modify the copy to suit your needs:

Creating a New Chatbot by Duplicating an Existing Bot.

1. Click on the three dots to the right of the **Share** button of the Chatbot you want to duplicate.
2. Select **Duplicate**.
3. Provide a name and select the Owner of the bot.

Your Chatbot will be created using the existing one as a template. From there, you can make any changes or updates you need.

Embedding Your Chatbots on Your Website

Embedding a Chatbot directly on your website ensures that guests can complete it without navigating away. Follow the steps below to integrate your Chatbot into your site easily.

Embed Your Chatbot on Your Website

Use the Embed Designer to match your Chatbot to your websites branding using the steps below:

Navigating to the Embed Designer

1. Click on **Chatbots** in the left-hand navigation menu.
2. Select the bot you want to embed.
3. Click on the **Embed Designer** tab at the top.

Choosing the Embed Option

Choose how your chatbot should load on your website:

- **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.

Designing the Bot

The Embed Designer provides a live preview (WYSIWYG editor), allowing you to see real-time updates of what your bot will look like.

Here are the key customization options available:

- **Theme Color:** Adjusts the overall color design of the bot.
- **Chatbot Icon:** Image displayed at the top of the bot and next to its messages.
- **Company Name:** Name displayed at the top of the bot.
- **Chatbot Name:** Name displayed next to each of the bot’s messages.
- **Launcher shapes and icons:** Adjust what the launcher button looks like.

Embedding the Code

1. Click **Get the code** (bottom right) to generate the embed code.
2. Click on **Copy & close** to copy the embed code.
3. Add the code on your website.

Offering Scheduling in Your Chatbot

Including scheduling within your Chatbot enables you to qualify your guests and ensure they schedule the appropriate type of meeting or connect with the correct host based on their specific needs. This feature not only improves meeting accuracy but also enhances the guest experience during scheduling.

Benefits of Offering Scheduling within a Chatbot

Integrating scheduling into your Chatbot provides several advantages:

- **Improved Guest Qualification:** Determines the right type of meeting or host for your guests, ensuring their needs are met effectively.
- **Dynamic Information Collection:** Captures relevant and tailored information based on the meeting type being scheduled, making it more targeted and efficient.
- **Enhanced Routing Precision:** Leverages the chatbot's routing capabilities to direct guests to the most suitable scheduling option, saving time for both parties.

How to Add Scheduling to Your Chatbot

Follow the steps below to integrate scheduling into your Chatbot:

Navigating to the Flow Builder

1. Click on **Chatbots** in the left-hand navigation menu.
2. Select the bot you want to add scheduling to.

Adding the Schedule Action

1. Add the **Schedule** action from the **Add Interaction** pane on the right.
2. Select what should be used to offer scheduling using the dropdown menu.
3. Click on **Save**.

Advanced Options for Scheduling

- You can include multiple Schedule actions within your Chatbot to accommodate different guest needs.
- Pair scheduling actions with the chatbot's conditional routing feature to guide your visitors to the most relevant scheduling option based on their inputs, preferences, or other qualifying criteria.

For example:

If a guest selects "Sales Inquiry" in the bot, the system can route them to schedule a call with a sales representative. Alternatively, if "Customer Support" is chosen, they can be directed to book a support meeting.

For more details on setting up routing conditions, refer to our **Routing Your Interactions article**.

Offering Live Chat with Your Chatbot

Including live chat within your Chatbot enables you to qualify your guests and ensure they connect with the correct user based on their specific needs.

Benefits of Offering Live Chat within a Chatbot

Integrating scheduling into your Chatbot provides several advantages:

- **Dynamic Information Collection:** Captures relevant information before the live chat to ensure your users have all the information they need to assist your guests.
- **Enhanced Routing Precision:** Leverages the bot's routing capabilities to direct guests to the most suitable Live chat team, ensuring their needs are met effectively.

How to Add Live Chat to Your Chatbot

Follow the steps below to integrate live chat into your Chatbot:

Navigating to the Flow Builder

1. Click on **Chatbots** in the left-hand navigation menu.
2. Select the bot you want to add live chat to.

Adding the Live chat Action

1. Add the **Live chat** action from the **Add Interaction** pane on the right.
2. Select which team the live chat should **Broadcast to**.
3. Enter a **Handoff Message** that will display while connecting the guest to your team.
4. Adjust the **Timeout Settings** to set how long it should try to connect with your team before timing out.
5. Click on **Save**.

How to Accept Live Chats

To accept live chat requests from guests who engage with your chatbot, you need to ensure that you are online and ready within the OnceHub application.

This can be done by following the steps below:

1. Click on your profile picture in the top right.
2. Toggle **Accept calls and chats** to on.

You can also set your working hours from here to automatically become available for live chats based on the availability you set up, as well as the busy time pulled from your connected calendar.

All requests can be seen by clicking on **Live Engagements** in the top navigation bar.

Advanced Options for Live Chats

- You can include multiple live chat actions within your Chatbot to accommodate different guest needs.
- Pair live chat actions with the Chatbot's conditional routing feature to guide your visitors to the most relevant live chat team based on their inputs, preferences, or other qualifying criteria.
- Consider routing to a scheduling action after the live chat in case your team is not able to accept the chat.

For example:

If a guest selects "Sales Inquiry" in the bot, the system can route them to chat with a sales representative. Alternatively, if "Customer Support" is chosen, they can be directed to chat with a support agent.

For more details on setting up routing conditions, refer to our **Routing Your Interactions article**.

Offering Instant Video Calls with Your Chatbot

Including instant video calls within your Chatbot enables you to qualify your guests and ensure they connect with the correct user based on their specific needs.

Benefits of Offering Instant Calls within a Chatbot

Integrating scheduling into your Chatbot provides several advantages:

- **Dynamic Information Collection:** Captures relevant information before the call to ensure your users have all the information they need to assist your guests.
- **Enhanced Routing Precision:** Leverages the bot's routing capabilities to direct guests to the most suitable team, ensuring their needs are met effectively.

How to Add Instant Calls to Your Chatbot

Follow the steps below to integrate instant calls into your Chatbot:

Navigating to the Flow Builder

1. Click on **Chatbots** in the left-hand navigation menu.
2. Select the bot you want to add instant calls to.

Adding the Instant Call Action

1. Add the **Instant Call** action from the **Add Interaction** pane on the right.
2. Select which team the instant call should **Broadcast to**.
3. Enter a **Handoff Message** that will display while connecting the guest to your team.
4. Adjust the **Timeout Settings** to set how long it should try to connect with your team before timing out.
5. Click on **Save**.

How to Accept Instant Calls

To accept instant call requests from guests who engage with your chatbot, you need to ensure that you are online and ready within the OnceHub application.

This can be done by following the steps below:

1. Click on your profile picture in the top right.
2. Toggle **Accept calls and chats** to on.

You can also set your working hours from here to automatically become available for instant calls based on the availability you set up, as well as the busy time pulled from your connected calendar.

All requests can be seen by clicking on **Live Engagements** in the top navigation bar.

Advanced Options for Instant Calls

- You can include multiple instant call actions within your Chatbot to accommodate different guest needs.
- Pair instant call actions with the Chatbot's conditional routing feature to guide your visitors to the most relevant team based on their inputs, preferences, or other qualifying criteria.
- Consider routing to a scheduling action after the instant call action in case your team is not able to accept the call.

For more details on setting up routing conditions, refer to our **Routing Your Interactions article**.

Frequently Asked Questions

Q: Do I need to have an integrated video conferencing option to offer instant calls?

A: Yes, the Instant Call feature makes use of your integrated video conferencing options. If nothing is connected, it will appear as if you are offline.

Setting Up Alerts in Your Chatbot

Adding alerts to your Chatbot can help keep your team informed when important interactions occur. For instance, if a visitor reaches a specific part of the bot or answers a key question that suggests they are a strong lead, you can trigger an internal email to notify the relevant team members. This allows your sales or other teams to take timely action, even if the visitor doesn't complete the bot or book directly.

Internal email alerts are fully team-facing, meaning visitors won't know about these notifications or receive any emails related to them. The alerts are strictly for internal updates.

Why Use Alerts in Your Chatbot?

Adding alerts ensures that:

- Your team is notified of high-priority developments immediately.
- No important leads slip through the cracks.
- Team members can take proactive steps based on key visitor interactions.

How to Add Alerts in Your Chatbot

Follow the steps below to add alerts in your Chatbot:

Navigating to the Flow Builder

1. Click on **Chatbots** in the left-hand navigation menu.
2. Select the bot you want to set up alerts for.

Setting up the Alert

1. Add the **Email alert** action from the **Add Interaction** pane on the right.
2. Provide the **Subject** line for the email that will be sent (**Optional**).
3. Provide a **Description** to be included in the email (**Optional**).
4. Select who should get the alert from the **Recipients** dropdown menu.
5. Click on **Save**.

Updating The Status of Contacts Captured Through Your Chatbot

When using Contact Statuses in OnceHub, you can dynamically update a contact's status based on their interactions with your Chatbots. This enables you to track a contact's journey and categorize them effectively based on their actions, such as scheduling or answering specific questions.

This feature works best when used with the routing capabilities of Chatbots. For more details on routing, refer to our **Routing Your Interactions article**.

What Are Contact Statuses?

Contact Statuses allow you to segment and label contacts as they move through your Chatbot. The available statuses are:

- **Qualified:** The contact meets your basic criteria.
- **Marketing Qualified:** The contact is ready for further engagement by your marketing team.
- **Sales Qualified:** The contact is ready for outreach by your sales team.
- **Disqualified:** The contact does not meet qualifications for further engagement.

How to Update Contact Statuses in Your Chatbot

Follow the steps below to update contact statuses in your Chatbot:

Navigating to the Flow Builder

1. Click on **Chatbots** in the left-hand navigation menu.
2. Select the bot you want to update Contact statuses for.

Updating the Contact status

1. Add the **Contact status** action from the **Add Interaction** pane on the right.
2. Select the status it should update to using the dropdown menu.
3. Click on **Save**.

Assigning Contacts Captured Through Chatbots to Users

This guide explains how to assign contacts captured via Chatbots to specific users. By following these steps, you can ensure your contacts are distributed efficiently and accurately to the right team members.

How to Assign Contact Captured Through Chatbots to Users

Follow the steps below to assign new Contacts captured in your Chatbots to Users:

Navigating to the Settings Tab

1. Click on **Chatbots** in the left-hand navigation menu.
2. Select the bot you want to assign Contacts in.
3. Click on the **Settings** tab at the top.

Assigning the Contact

New contacts can be assigned to users in two ways:

- **Round-robin distribution:** Select users from the dropdown menu for this assignment method.
- **Assign to meeting host:** Check the **Assign new contact to the meeting host** box to assign contacts to the host they scheduled a meeting with via the Chatbot, overriding the round-robin method.

Mapping Chatbot Questions to Fields

Each Question in your Chatbot can be mapped to a Contact field to save their responses within a OnceHub Contact, as well as use it to send the data to third party integrations such as CRMs and Zapier.

For information on creating Contact Fields, please take a look at our **Fields Library article**.

Mapping a Question to a Contact Field

Each Chatbot allows you to configure which Questions will be saved into a Contact field using the following steps:

1. Open the **Flow Builder Tab** of the Chatbot.
2. Select the **Question** you want to save to a Contact field.
3. Select **In the conversation and as a contact field** in the pane on the right.
4. Select the desired **Contact Field** from the dropdown.
5. Click on **Save**.

Enabling Slack Notifications for Live Engagements in Chatbots

When a guest requests a live chat or instant call, you can receive notifications in Slack via webhooks.

Key Benefits of Slack Notifications for Live Engagements

- **Real-time Alerts:** Get instantly notified when guests request live assistance.
- **Customizable Channels:** Route notifications to specific channels to better organize your team.

Step 1: Create a Workflow in Slack

To enable notifications, start by creating a Workflow in Slack. Slack will generate a unique request URL for your workflow once you publish it that you will need to paste in OnceHub.

For more information on this, we recommend taking a look at **Slack’s help center**.

Step 2: Add the Webhook in OnceHub

Now, add your request URL from Slack to OnceHub to start receiving notifications:

Navigating to the Flow Builder

1. Click on **Chatbot** in the left-hand navigation menu.
2. Select the bot you want to get Slack notifications for.

Adding the Webhook URL

1. Select the **Live chat** or **Instant call** action.
2. Add the URL to **Webhook Notifications**.
3. Click on **Save**.

Step 3: Test the Integration

Once everything is set up:

1. Click the **Test** button in OnceHub's Live chat action settings to send a test notification to your Slack channel.
2. Confirm that the Slack channel receives the test message to ensure the integration is working.

Enabling Microsoft Teams Notifications for Live Engagements in Chatbots

When a guest requests a live chat or instant call, you can receive notifications in Microsoft Teams via webhooks.

Key Benefits of Microsoft Teams Notifications for Live Engagements

- **Real-time Alerts:** Get instantly notified when guests request live assistance.
- **Customizable Channels:** Route notifications to specific channels to better organize your team.

Step 1: Create an Incoming Webhook in Microsoft Teams

To enable notifications, start by creating an incoming webhook in Microsoft Teams. Microsoft Teams will generate a unique webhook URL that you will need to paste in OnceHub.

For more information on this, we recommend taking a look at **Microsoft's help center**.

Step 2: Add the Webhook in OnceHub

Now, add your webhook URL from Microsoft Teams to OnceHub to start receiving notifications:

Navigating to the Flow Builder

1. Click on **Chatbot** in the left-hand navigation menu.
2. Select the bot you want to get Microsoft Teams notifications for.

Adding the Webhook URL

1. Select the **Live chat** or **Instant call** action.
2. Add the URL to **Webhook Notifications**.
3. Click on **Save**.

Step 3: Test the Integration

Once everything is set up:

1. Click the **Test** button in OnceHub's Live chat action settings to send a test notification to Microsoft Teams.
2. Confirm that you received the test message to ensure the integration is working.

Enabling Google Chat Notifications for Live Engagements in Chatbots

When a guest requests a live chat or instant call, you can receive notifications in Google Chat via webhooks.

Key Benefits of Google Chat Notifications for Live Engagements

- **Real-time Alerts:** Get instantly notified when guests request live assistance.
- **Customizable Channels:** Route notifications to specific channels to better organize your team.

Step 1: Create an Incoming Webhook in Google Chat

To enable notifications, start by creating an incoming webhook in Google Chat. Google Chat will generate a unique webhook URL that you will need to paste in OnceHub.

For more information on this, we recommend taking a look at **Google's help center**.

Step 2: Add the Webhook in OnceHub

Now, add your webhook URL from Google Chat to OnceHub to start receiving notifications:

Navigating to the Flow Builder

1. Click on **Chatbot** in the left-hand navigation menu.
2. Select the bot you want to get Google Chats notifications for.

Adding the Webhook URL

1. Select the **Live chat** or **Instant call** action.
2. Add the URL to **Webhook Notifications**.
3. Click on **Save**.

Step 3: Test the Integration

Once everything is set up:

1. Click the **Test** button in OnceHub's Live chat action settings to send a test notification to Google Chat.
2. Confirm that you received the test message to ensure the integration is working.

Contacts

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.

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.

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.

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.

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

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.

Scheduling and live engagements with chatbots

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

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.

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.

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.

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.

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 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.

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.

Legal and compliance

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

Automatically Reach Out to Your Website Visitors with a Chatbot

Enable your chatbot to directly identify and interact with website visitors who meet specific criteria. This feature, called Automatic Reach Out ensures that your website visitors receive personalized engagement, enhancing their experience and increasing the likelihood of conversion.

Automatic Reach Out consists of two main components:

- **Audience:** A defined group of website visitors who match specific criteria set by you (e.g., location, behavior, or other parameters).
- **Targeting:** The ability to focus on the created audiences with chatbots that appear automatically when the criteria are met.

Why Use Automatic Reach Out?

This feature allows you to proactively engage visitors by:

- Connecting with the right audience at the right time.
- Delivering tailored messages for better interactions.
- Automating the interaction process to save valuable time while enhancing visitor experience.

How to Access Automatic Reach Out

To enable and configure Automatic Reach Out, follow these steps:

1. Click on **Chatbots** in the left-hand navigation menu.
2. Click on the blue target with an arrow in the top-right.

Steps to Set Up Automatic Reach Out on Your Website

Ready to engage your website visitors automatically? Follow these steps to set up Automatic Reach Out. Each step links to a detailed guide that walks you through the setup process:

1. **Define Audiences for your website visitors**.
2. **Target the Audiences with chatbots**.
3. **Assign Contacts captured through chatbots to users**.
4. **Customize the design of your Automatic reach out bots**.
5. **Install Automatic reach out on your website**.

Defining Audiences for Your Website Visitors

Audiences allow you to group website visitors based on specific criteria you set. By defining audiences, you can personalize interactions to suit the visitor's characteristics or behavior, such as their location, campaign source, website activity, or engagement with chatbots.

This guide explains what an audience is, how to define one, and how rules work to make targeting more effective.

What is an audience?

An **Audience** is a group of website visitors who share common traits determined by rules you set. By defining audiences, you can tailor your outreach efforts to visitors based on:

- Their geographic location (using their IP address).
- The marketing campaign that brought them to your site (measured by UTM codes or landing pages).
- Their prior website activity (e.g., number of visits or chatbot engagements).

For example, you could create an audience of website visitors from a specific country or those arriving via a promotional campaign. Targeting these groups ensures more relevant and engaging website interactions.

How to Define an Audience

Navigating to Automatic reach out

1. Click on **Chatbots** in the left-hand navigation menu.
2. Click on the blue target with an arrow in the top-right.

Creating an Audience

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.

1. Click on **Create Audience** in the top-right
2. Choose which template to use.
3. Provide a name for the audience.
4. Define rules to identify website visitors that will be included in the audience.
5. Click on **Save**.

What makes up a Rule?

Rules are the foundation of audiences. A rule includes one or more conditions that must be met for a visitor to belong to the audience. Below are the types of conditions you can add:

- **Country:** The country of the visitor, based on their IP address.
- **UTM campaign:** Arriving at 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 of 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

Using Multiple Rules

You can include multiple rules for a single audience. If multiple rules are used, the visitor will be included in the audience if any of the rules are true.

Targeting an Audience with Chatbots

When a visitor lands on your website, OnceHub assesses whether they meet the defined parameters for a specific audience. Each visit initiates a new session, which automatically resets 30 minutes after the visitor's last page view.

Based on the targeting rules you've set up, a chatbot may be triggered to display on the webpage, engaging the visitor proactively.

Target Your Audiences with Chatbots

Targeting an audience involves setting specific parameters that decide when your chatbots will engage website visitors. Follow these steps to define which chatbots will target your audiences:

Navigating to Automatic reach out

1. Click on **Chatbots** in the left-hand navigation menu.
2. Click on the blue target with an arrow in the top-right.

Targeting an Audience

1. Click on **Targeting** in the lefthand menu.
2. Click on an **Audience** to target.
3. Define rules to determine which chatbot will appear.
4. Click on **Save**.

What makes up a Rule?

Each rule comprises 3 core components:

- **Conditions:** These are criteria that must be met to activate the rule. Conditions can be based on:
  - Time on the website.
  - The Url of the page they are currently on.
- **Targeted bot:** This determines which chatbot will appear if the conditions of the rule are met.
- **Advanced settings:** Lets you choose how often the chatbot will reach out to a website visitor.

Using Multiple Rules

You can include multiple rules when targeting an Audience. If multiple rules are used, the visitor will be included in the audience if any of the rules are true.

You can include multiple rules when targeting an Audience. The OnceHub will evaluate the rules in order, starting from the top. When the conditions for a rule is met, the chatbot designated in that rule will appear for the website visitor.

If the top rule's conditions are not met, then OnceHub will proceed to test the next rule. If no rules are met, no chatbots will appear for your visitor.

Customizing the Design of your Automatic Reach Out Bots

Customize the design of the chatbots that will appear to your website visitors to match your branding using the steps below:

Navigating to the Automatic reach out Design Page

1. Click on **Chatbots** in the left-hand navigation menu.
2. Click on the blue target with an arrow in the top-right.
3. Click on **Design** in the left-hand menu.

Designing the Bot

The Embed Designer provides a live preview (WYSIWYG editor), allowing you to see real-time updates of what your bot will look like.

Here are the key customization options available:

- **Theme Color:** Adjusts the overall color design of the bot.
- **Chatbot Icon:** Image displayed at the top of the bot and next to its messages.
- **Company Name:** Name displayed at the top of the bot.
- **Chatbot Name:** Name displayed next to each of the bot's messages.
- **Launcher shapes and icons:** Adjust what the launcher button looks like.

Embedding the Code

1. Click **Get the code** (bottom right) to generate the embed code.
2. Click on **Copy & close** to copy the embed code.
3. Add the code on your website.

Installing Automatic Reach Out on Your Website

Once you have finished defining your Audiences and set up which bots should target them, you are ready to install the Automatic Reach Out Embed on your website.

Navigating to the Embed Code

1. Click on **Chatbots** in the left-hand navigation menu.
2. Click on the blue target with an arrow in the top-right.
3. Click on the **Installation** in the left-hand menu.

Embedding the Code

1. Click **Copy code** to generate the embed code.
2. Add the code on your website.
3. Add the code inside of the header on each webpage you want to chatbots to potentially appear based on your setup.
4. Use the **Verify installation** link to check if we successfully detect the code on your website (**Optional**).

Adding chatbots to your Squarespace website

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

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

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_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 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

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_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 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

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

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_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 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

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_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 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

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

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.

Engage with visitors using an AI conversation

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

Here is a list of instruction templates for various fields that you can use to get started with to design your own AI conversation:

- Generic template
- Finance template
- Business consulting template
- Coaching template
- Education template
- Wellness template
- Real estate template

Generic AI Instruction Template

Use this template as a starting point to design clear and effective instructions for the AI Conversation action in your chatbot.

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

AI Instruction Template for Finance

Use this template as a starting point to design clear and effective instructions for the AI Conversation action in your chatbot.

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

If: Total amount of assets under management or portfolio is greater than $1 million

Then route to: Normal meeting

If: Total amount of assets under management or portfolio is greater than $5 million

Then route to: VIP Meeting

If: Total amount of assets under management or portfolio is less than $1 million

Then route to: Email

AI Instruction Template for Business Consulting

Use this template as a starting point to design clear and effective instructions for the AI Conversation action in your chatbot.

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

If: The visitor has a budget for consultancy services of $1000 or less

Then route to: Email

If: The visitor has a budget for consultancy services of $5000 or more

Then route to: Meeting

AI Instruction Template for Coaching

Use this template as a starting point to design clear and effective instructions for the AI Conversation action in your chatbot.

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

AI Instruction Template for Education

Use this template as a starting point to design clear and effective instructions for the AI Conversation action in your chatbot.

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

AI Instruction Template for Wellness

Use this template as a starting point to design clear and effective instructions for the AI Conversation action in your chatbot.

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

If: The visitor is interested in mental healthcare
Then route to: Meeting

If: The visitor is interested in wellness coaching
Then route to: Meeting

AI Instruction Template for Real Estate

Use this template as a starting point to design clear and effective instructions for the AI Conversation action in your chatbot.

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.

Introduction to Routing Forms

Routing Forms in OnceHub streamline the qualification process by asking your guests tailored questions and directing them to specific actions based on their responses.

What is a Routing Form?

A Routing Form helps you qualify guests by guiding them through customized paths based on their answers to specific questions. These paths, or "routes," can lead to various outcomes, such as:

- Scheduling a meeting directly within the form.
- Connecting with a live sales agent via chat.
- Redirecting to a specific page on your website that provides personalized information.

The flexibility of Routing Forms ensures that your guests receive a tailored experience that aligns with their needs, helping you nurture valuable leads more effectively.

Key Benefits of Using Routing Forms

- **Efficient Lead Qualification:** Instantly identify and qualify leads through conditional routing.
- **Engage High-Value Leads:** Offer scheduling options directly to qualified leads within the form itself, streamlining the conversion process.
- **Customized Data Collection:** Tailor the information you gather to align with the type of meetings or interactions your business offers.

Core Features of Routing Forms

Routing Forms come equipped with powerful features designed for flexibility and effectiveness:

- **Conditional Routing:** Direct guests to the next appropriate step based on their form responses.
- **Customizable Forms:** Collect only the information you need for better qualification and reduced friction.
- **In-Form Scheduling and Live Chat:** Enable guests to set up meetings or initiate a chat, all without leaving the form.
- **Standalone Page Sharing:** Provide guests with a direct link to access your form.
- **Website Embedding:** Easily integrate the form into your website for a smoother customer journey.

Creating a Routing Form

Creating a Routing Form in OnceHub is simple. You can start with a blank form, duplicate an existing form, or use a pre-designed template to get started.

Navigating to the Routing Forms Lobby

1. Click on **Routing Forms** in the left-hand navigation menu.

Create a New Blank Routing Form

If you prefer to design your Routing Form entirely from scratch, follow these steps:

Creating a Blank Routing Form

1. Click on **Create routing form** in the top right of the Routing Forms Lobby.
2. Click on **Start from scratch** in the top right.
3. Provide a name and select the Owner of the form.

You are now ready to start creating your Routing Form. We recommend taking a look at our **Adding Questions to Your Routing Form article** to get started.

Create a New Routing Form from a Template

Templates can save you time by providing a pre-built structure that you can customize. If you prefer to start off with a template, follow these steps:

Creating a Routing Form using a Template

1. Click on **Create routing form** in the top right of the Routing Forms Lobby.
2. Select the template you wish to use.
3. Provide a name and select the Owner of the form.

Your form will be created based on the chosen template. Afterward, you can learn about customizing the questions by checking out our **Adding Questions to Your Routing Form article**.

Duplicate an Existing Routing Form

If you have an existing Routing Form you'd like to use as a starting point, you can duplicate it and modify the copy to suit your needs:

Creating a New Routing Form by Duplicating an Existing Form.

1. Click on the three dots to the right of the **Share** button of the Routing Form you want to duplicate.
2. Select **Duplicate**.
3. Provide a name and select the Owner of the form.

Your Routing Form will be created using the existing one as a template. From there, you can make any changes or updates you need.

Adding Questions to Your Routing Form

The Flow Builder for Routing Forms is a flexible tool designed to enhance the user experience by allowing you to add questions to gather information, set conditional routing based on guest responses, and set actions for the form to take.

In this article we will focus on the various questions that you can add to your form within the Flow Builder.

How to Access the Flow Builder

1. Click on **Routing Forms** in the left-hand navigation menu.
2. Select the Routing Form you want to edit.

Once here you can drag and drop questions from the **Add Interaction** pane on the right into your Routing Form.

Types of Questions Available

The Flow Builder provides a variety of question types to help you collect and qualify information. Below are the available question types and their purposes:

- **Single select:** Guests choose one answer from multiple options. Ideal for straightforward selection questions.
- **Free text:** Allow guests to provide written responses in their own words. Useful for open-ended questions.
- **Email:** Collect email addresses from your guests. Perfect for contact information needs.
- **Phone:** Request your guest's phone number for outreach purposes.
- **Multi select:** Guests can select multiple options. Great for surveys or multi-choice scenarios.
- **Number:** Gather numerical values. This works well for quantities or measurements.

Saving Guest Responses to OnceHub Contact Fields

Once responses are collected, you have the option to save them to existing Contact fields within OnceHub. This feature is particularly useful for sending guest information to third-party integrations, such as CRM systems.

To learn more about Contacts, please check out our **Contact Fields Library article**.

Saving a Response to a Contact Field

1. Select the Question you want to save to a Contact.
2. Select **In the conversation and as a contact field** in the Interaction Pane on the right.
3. Select the field from the **Contact Field** dropdown.
4. Click **Save**.

What's Next?

After adding your questions, consider configuring routing settings to direct interactions based on guest responses.

Check out our **Routing your Interactions article** for more information.

Routing Your Interactions in Routing Forms

The Flow Builder for Routing Forms is a flexible tool designed to enhance the user experience by allowing you to add questions to gather information, set conditional routing based on guest responses, and set actions for the form to take.

This article focuses on the routing you can configure for your form within the Flow Builder.

How to Access the Flow Builder

1. Click on **Routing Forms** in the left-hand navigation menu.
2. Select the Routing Form you want to edit.

Once here you can click on the Interaction you want to define routing for. Then, on the right-hand side of the screen you will see the Routing pane.

How does routing work?

Routing allows you to control the flow of guest interactions within your form by determining what happens after each response. For every interaction, you can choose to:

- **Route to the next interaction in order:** Proceeds to the next interaction in sequential order.
- **Always route to a specific interaction:** Routes the guest to the specified Interaction, no matter their response.
- **Route to interactions based on rules:** Routes based on the guest's responses and predefined rules.

Routing to Interactions Based on Rules

Using rules for routing enables you to create dynamic flows that adapt to the responses or data provided by your guests. Here's how to design effective rules:

What makes up a Rule?

Each rule comprises two core components:

1. **Conditions:** These are criteria that must be met to activate the rule. Conditions can be based on:
   - The guest's response in the current interaction.
   - Responses from previous interactions.
   - Information stored in a contact field.
2. **Routing Action:** This determines the interaction to route the guest to when the conditions of the rule are met.

Using Multiple Rules

You can include multiple rules within a single interaction for a more nuanced routing process. The Routing Form will evaluate the rules in order, starting from the top. When a condition is met, the guest will be routed to the designated interaction for that rule.

If the top rule's conditions are not met, the Routing Form will proceed to test the next rule, working its way down the list until a condition is satisfied.

Note: Always use the **Otherwise** option at the bottom of the **Routing** pane as a fallback. This ensures that, if none of the specified rule conditions are met, the Routing Form will still guide the guest to a predefined interaction or endpoint.

Sharing Your Routing Form as a Standalone Page

You can easily share your Routing Form with customers by generating a unique link. The Routing Form will display on a standalone page that you can customize to align with your branding. Follow this guide to design and share your Routing Form page.

Design the Standalone Page

Use the Page Designer to create a visually appealing standalone page for your Routing Form using the steps below:

Navigating to the Page Designer

1. Click on **Routing Forms** in the left-hand navigation menu.
2. Select the form you want to design a standalone page for.
3. Click on the **Page Designer** tab at the top.

Designing the Page

The Page Designer provides a live preview (WYSIWYG editor), allowing you to see real-time updates for both desktop and mobile views as you design your page.

Here are the key customization options available:

- **Customize the URL:** Create a unique and easy-to-share URL for the page.
- **Branding Adjustments:** Match your brand's style by adjusting background, text, and button colors.
- **Add Visuals and Messaging:** Upload custom images, logos, and a personalized welcome message.
- **Incorporate Links:** Add helpful links in the footer or welcome message for navigation or valuable resources.
- **Social Media Integration:** Include clickable social media icons for platforms such as your website, X (formerly Twitter), YouTube, and others.

Once your design is complete, you can generate a sharable link by clicking **Share Your Page**.

Share your Routing Form as a Standalone Page

Navigating to the Routing Forms lobby

1. Click on **Routing Forms** in the left-hand navigation menu.

Sharing the link

1. Click on the **Share** button for the Routing Form you want to share as a page.
2. Click on **Copy & close** in the pop-up.
3. Paste the link wherever needed.

Embedding Your Routing Form on Your Website

Embedding a Routing Form directly on your website ensures that guests can complete it without navigating away. Follow the steps below to integrate your Routing Form into your site easily.

Embed Your Routing Form on Your Website

Use the Embed Designer to match your Routing Form to your websites branding using the steps below:

Navigating to the Embed Designer

1. Click on **Routing Forms** in the left-hand navigation menu.
2. Select the form you want to embed.
3. Click on the **Embed Designer** tab at the top.

Choosing the Form Color

1. Choose a color for your form that matches your website

Embedding the Code

1. Click **Get the code** (bottom right) to generate the embed code.
2. Click on **Copy & close** to copy the embed code.
3. Add the code on your website where you want the form to appear.

Building a routing form

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.

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.

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.

Setting your routing form interactions

You can route your interactions by choosing conditions and deciding what to jump to 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).

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.

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**.

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.

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**).

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.

Offering Scheduling In Your Routing Form

Including scheduling within your Routing Form enables you to qualify your guests and ensure they schedule the appropriate type of meeting or connect with the correct host based on their specific needs. This feature not only improves meeting accuracy but also enhances the guest experience during scheduling.

Benefits of Offering Scheduling within a Routing Form

Integrating scheduling into your Routing Form provides several advantages:

- **Improved Guest Qualification:** Determines the right type of meeting or host for your guests, ensuring their needs are met effectively.
- **Dynamic Information Collection:** Captures relevant and tailored information based on the meeting type being scheduled, making it more targeted and efficient.
- **Enhanced Routing Precision:** Leverages the form's routing capabilities to direct guests to the most suitable scheduling option, saving time for both parties.

How to Add Scheduling to Your Routing Form

Follow the steps below to integrate scheduling into your Routing Form:

Navigating to the Flow Builder

1. Click on **Routing Forms** in the left-hand navigation menu.
2. Select the form you want to add scheduling to.

Adding the Schedule Action

1. Add the **Schedule** action from the **Add Interaction** pane on the right.
2. Select what should be used to offer scheduling using the dropdown menu.
3. Click on **Save**.

Advanced Options for Scheduling

- You can include multiple Schedule actions within your Routing Form to accommodate different guest needs.
- Pair scheduling actions with the Routing Form's conditional routing feature to guide your visitors to the most relevant scheduling option based on their inputs, preferences, or other qualifying criteria.

For example:

If a guest selects "Sales Inquiry" in the form, the system can route them to schedule a call with a sales representative. Alternatively, if "Customer Support" is chosen, they can be directed to book a support meeting.

For more details on setting up routing conditions, refer to our **Routing Your Interactions article**.

Offering Live Chat In Your Routing Form

Including live chat within your Routing Form enables you to qualify your guests and ensure they connect with the correct user based on their specific needs.

Benefits of Offering Live Chat within a Routing Form

Integrating scheduling into your Routing Form provides several advantages:

- **Dynamic Information Collection:** Captures relevant information before the live chat to ensure your users have all the information they need to assist your guests.
- **Enhanced Routing Precision:** Leverages the form's routing capabilities to direct guests to the most suitable Live chat team, ensuring their needs are met effectively.

How to Add Live Chat to Your Routing Form

Follow the steps below to integrate live chat into your Routing Form:

Navigating to the Flow Builder

1. Click on **Routing Forms** in the left-hand navigation menu.
2. Select the form you want to add live chat to.

Adding the Live chat Action

1. Add the **Live chat** action from the **Add Interaction** pane on the right.
2. Select which team the live chat should **Broadcast to**.
3. Enter a **Handoff Message** that will display while connecting the guest to your team.
4. Adjust the **Timeout Settings** to set how long it should try to connect with your team before timing out.
5. Click on **Save**.

Advanced Options for Live Chats

- You can include multiple live chat actions within your Routing Form to accommodate different guest needs.
- Pair live chat actions with the Routing Form's conditional routing feature to guide your visitors to the most live chat team based on their inputs, preferences, or other qualifying criteria.
- Consider routing to a scheduling action after the live chat in case your team is not able to accept the chat.

For example:

If a guest selects "Sales Inquiry" in the form, the system can route them to chat with a sales representative. Alternatively, if "Customer Support" is chosen, they can be directed to chat with a support agent.

For more details on setting up routing conditions, refer to our **Routing Your Interactions article**.

Redirecting Guests to an External Website from Routing Forms

Redirecting guests to another website after they complete a routing form can help guide them to additional resources, such as product information or a support page. With Routing Forms, you can easily configure this redirection process.

How to Redirect Guests from Your Routing Form

Follow the steps below to redirect guests after they complete your Routing Form:

Navigating to the Flow Builder

1. Click on **Routing Forms** in the left-hand navigation menu.
2. Select the form you want to set up to redirect to another website to.

Setting up the Redirect

1. Add the **End** action from the **Add Interaction** pane on the right.
2. Toggle **Redirect Visitor** to **ON**.
3. Add the **Redirect URL**.
4. Choose if the redirect should happen automatically, or if a redirect button should be provided to them.
5. Click on **Save**.

Setting Up Alerts in Your Routing Form

Adding alerts to your Routing Form can help keep your team informed when important interactions occur. For instance, if a visitor reaches a specific part of the form or answers a key question that suggests they are a strong lead, you can trigger an internal email to notify the relevant team members. This allows your sales or other teams to take timely action, even if the visitor doesn't complete the form or book directly.

Internal email alerts are fully team-facing, meaning visitors won't know about these notifications or receive any emails related to them. The alerts are strictly for internal updates.

Why Use Alerts in Your Routing Form?

Adding alerts ensures that:

- Your team is notified of high-priority developments immediately.
- No important leads slip through the cracks.
- Team members can take proactive steps based on key visitor interactions.

How to Add Alerts in Your Routing Form

Follow the steps below to add alerts in your Routing Form:

Navigating to the Flow Builder

1. Click on **Routing Forms** in the left-hand navigation menu.
2. Select the form you want to set up alerts for.

Setting up the Alert

1. Add the **Email alert** action from the **Add Interaction** pane on the right.
2. Provide the **Subject** line for the email that will be sent (**Optional**).
3. Provide a **Description** to be included in the email (**Optional**).
4. Select who should get the alert from the **Recipients** dropdown menu.
5. Click on **Save**.

Updating The Status of Contacts Captured Through Your Routing Form

When using Contact Statuses in OnceHub, you can dynamically update a contact's status based on their interactions with your Routing Forms. This enables you to track a contact's journey and categorize them effectively based on their actions, such as scheduling or answering specific questions.

This feature works best when used with the routing capabilities of Routing Forms. For more details on routing, refer to our **Routing Your Interactions article**.

What Are Contact Statuses?

Contact Statuses allow you to segment and label contacts as they move through your Routing Form. The available statuses are:

- **Qualified:** The contact meets your basic criteria.
- **Marketing Qualified:** The contact is ready for further engagement by your marketing team.
- **Sales Qualified:** The contact is ready for outreach by your sales team.
- **Disqualified:** The contact does not meet qualifications for further engagement.

How to Update Contact Statuses in Your Routing Form

Follow the steps below to update contact statuses in your Routing Form:

Navigating to the Flow Builder

1. Click on **Routing Forms** in the left-hand navigation menu.
2. Select the form you want to update Contact statuses for.

Updating the Contact status

1. Add the **Contact status** action from the **Add Interaction** pane on the right.
2. Select the status it should update to using the dropdown menu.
3. Click on **Save**.

Assigning Contacts Captured Through Routing Forms to Users

This guide explains how to assign contacts captured via Routing Forms to specific users. By following these steps, you can ensure your contacts are distributed efficiently and accurately to the right team members.

How to Assign Contact Captured Through Routing Forms to Users

Follow the steps below to assign new Contacts captured in your Routing Forms to Users:

Navigating to the Settings Tab

1. Click on **Routing Forms** in the left-hand navigation menu.
2. Select the form you want to assign Contacts in.
3. Click on the **Settings** tab at the top.

Assigning the Contact

New contacts can be assigned to users in two ways:

- **Round-robin distribution:** Select users from the dropdown menu for this assignment method.
- **Assign to meeting host:** Check the **Assign new contact to the meeting host** box to assign contacts to the host they scheduled a meeting with via the Routing Form, overriding the round-robin method.

Mapping Routing Form Questions to Fields

Each Question in your Routing form can be mapped to a Contact field to save their responses within a OnceHub Contact, as well as use it to send the data to third party integrations such as CRMs and Zapier.

For information on creating Contact Fields, please take a look at our **Fields Library article**.

Mapping a Question to a Contact Field

Each Routing form allows you to configure which Questions will be saved into a Contact field using the following steps:

1. Open the **Flow Builder Tab** of the Routing Form.
2. Select the **Question** you want to save to a Contact field.
3. Select **In the conversation and as a contact field** in the pane on the right.
4. Select the desired **Contact Field** from the dropdown.
5. Click on **Save**

Enabling Slack Notifications for Live Chats in Routing Forms

When a guest requests a live chat, you can receive notifications in Slack via webhooks.

Key Benefits of Slack Notifications for Live Chats

- **Real-time Alerts:** Get instantly notified when guests request live assistance.
- **Customizable Channels:** Route notifications to specific channels to better organize your team.

Step 1: Create a Workflow in Slack

To enable notifications, start by creating a Workflow in Slack. Slack will generate a unique request URL for your workflow once you publish it that you will need to paste in OnceHub.

For more information on this, we recommend taking a look at **Slack's help center**.

Step 2: Add the Webhook in OnceHub

Now, add your request URL from Slack to OnceHub to start receiving notifications:

Navigating to the Flow Builder

1. Click on **Routing Forms** in the left-hand navigation menu.
2. Select the form you want to get Slack notifications for.

Adding the Webhook URL

1. Select the **Live chat** action.
2. Add the URL to **Webhook Notifications**.
3. Click on **Save**.

Step 3: Test the Integration

Once everything is set up:

1. Click the Test button in OnceHub's Live chat action settings to send a test notification to your Slack channel.
2. Confirm that the Slack channel receives the test message to ensure the integration is working.

Enabling Microsoft Teams Notifications for Live Chat in Routing Forms

When a guest requests a live chat or instant call, you can receive notifications in Microsoft Teams via webhooks.

Key Benefits of Microsoft Teams Notifications for Live Chats

- **Real-time Alerts:** Get instantly notified when guests request live assistance.
- **Customizable Channels:** Route notifications to specific channels to better organize your team.

Step 1: Create an Incoming Webhook in Microsoft Teams

To enable notifications, start by creating an incoming webhook in Microsoft Teams. Microsoft Teams will generate a unique webhook URL that you will need to paste in OnceHub.

For more information on this, we recommend taking a look at **Microsoft's help center**.

Step 2: Add the Webhook in OnceHub

Now, add your webhook URL from Microsoft Teams to OnceHub to start receiving notifications:

Navigating to the Flow Builder

1. Click on **Routing Forms** in the left-hand navigation menu.
2. Select the form you want to get Microsoft Teams notifications for.

Adding the Webhook URL

1. Select the **Live chat** action.
2. Add the URL to **Webhook Notifications**.
3. Click on **Save**.

Step 3: Test the Integration

Once everything is set up:

1. Click the Test button in OnceHub's Live chat action settings to send a test notification to Microsoft Teams.
2. Confirm that you received the test message to ensure the integration is working.

Enabling Google Chat Notifications for Live Chat in Routing Forms

When a guest requests a live chat or instant call, you can receive notifications in Google Chat via webhooks.

Key Benefits of Google Chat Notifications for Live Chats

- **Real-time Alerts:** Get instantly notified when guests request live assistance.
- **Customizable Channels:** Route notifications to specific channels to better organize your team.

Step 1: Create an Incoming Webhook in Google Chat

To enable notifications, start by creating an incoming webhook in Google Chat. Google Chat will generate a unique webhook URL that you will need to paste in OnceHub.

For more information on this, we recommend taking a look at **Google's help center**.

Step 2: Add the Webhook in OnceHub

Now, add your webhook URL from Google Chat to OnceHub to start receiving notifications:

Navigating to the Flow Builder

1. Click on **Routing Forms** in the left-hand navigation menu.
2. Select the form you want to get Google Chat notifications for.

Adding the Webhook URL

1. Select the **Live chat** action.
2. Add the URL to **Webhook Notifications**.
3. Click on **Save**.

Step 3: Test the Integration

Once everything is set up:

1. Click the Test button in OnceHub's Live chat action settings to send a test notification to Google Chat.
2. Confirm that you received the test message to ensure the integration is working.

Send a link to a form

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.

Adding routing forms to your Squarespace website

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.

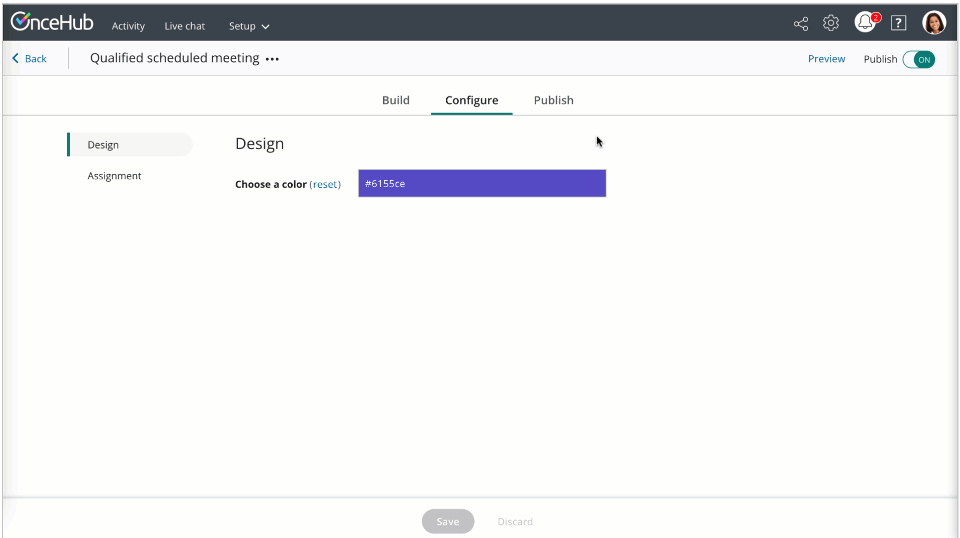


Figure 1: Copy the embed code

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

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.

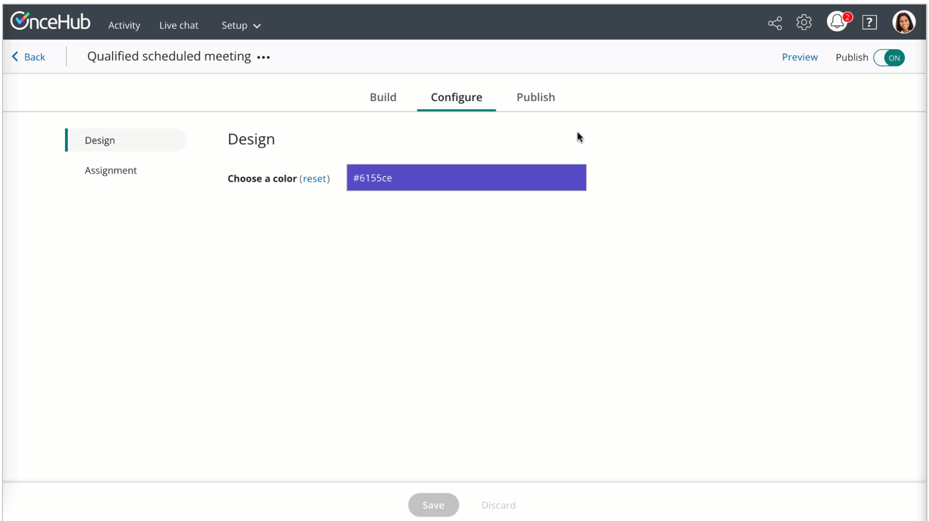


Figure 1: Copy the embed code

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

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.

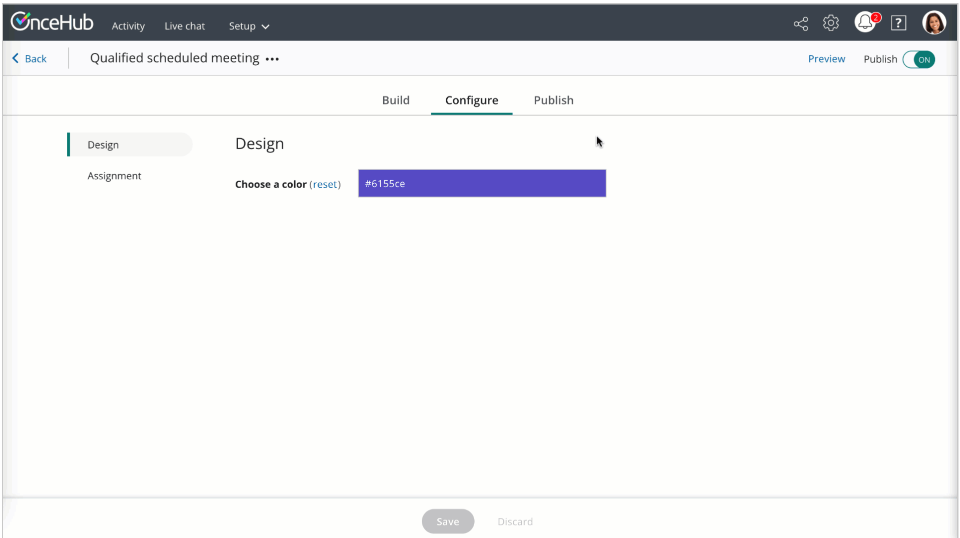


Figure 1: Copy the embed code

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

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.

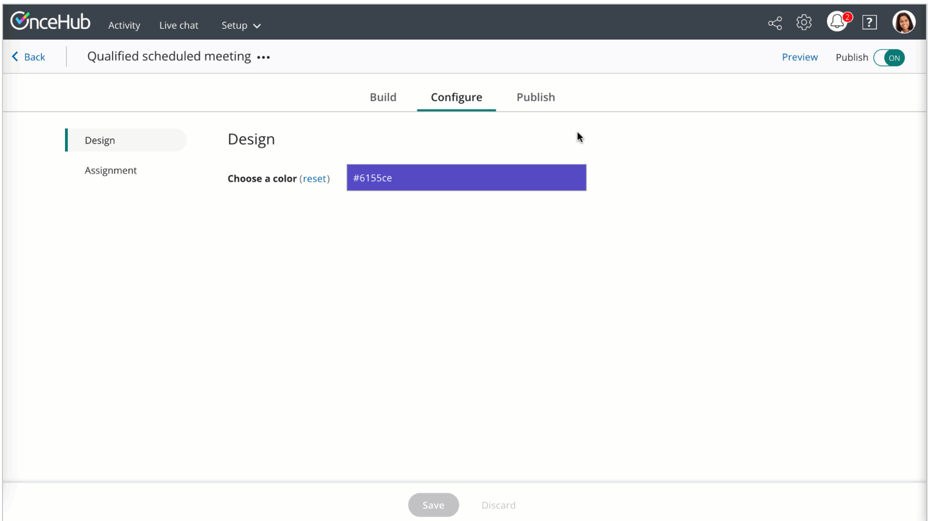


Figure 1: Copy the embed code

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

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.

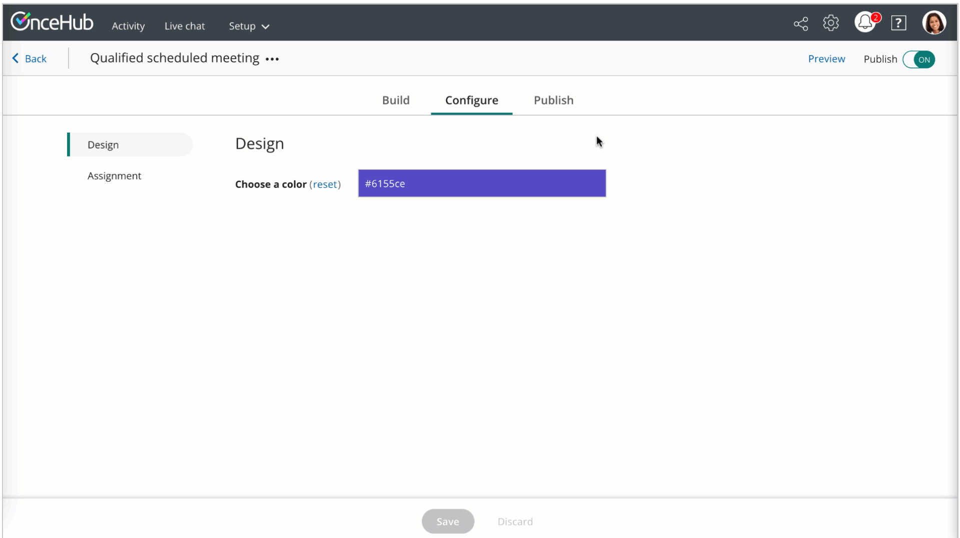


Figure 1: Copy the embed code

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

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.

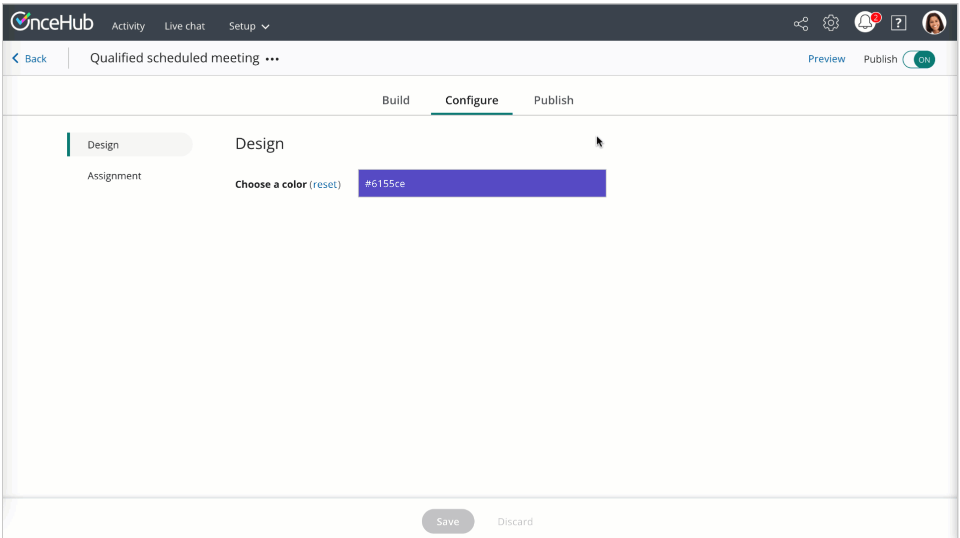


Figure 1: Copy the embed code

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

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.

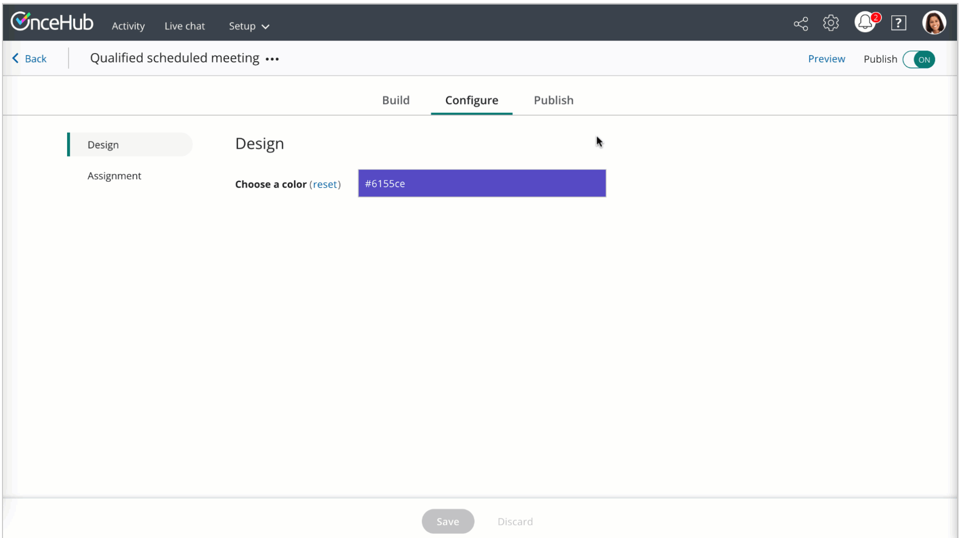


Figure 1: Copy the embed code

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

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.

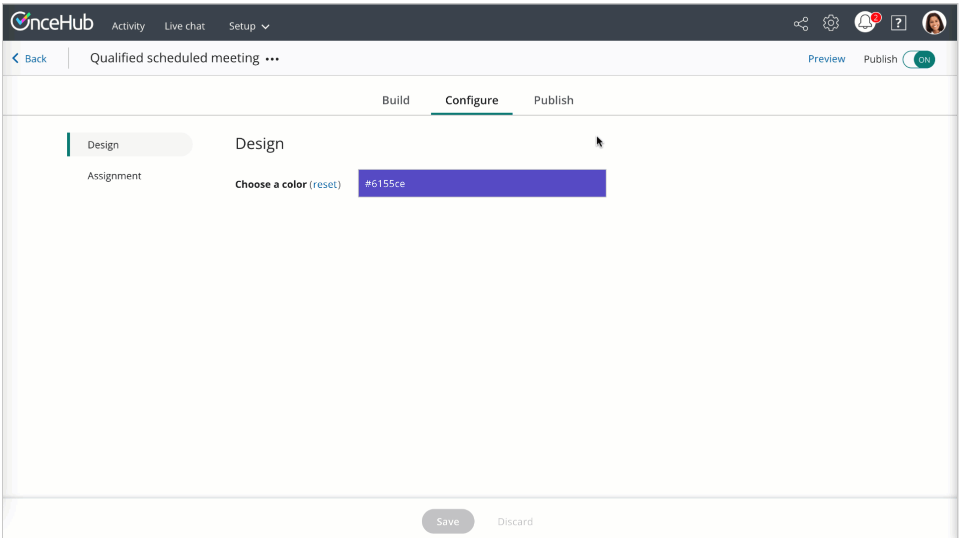


Figure 1: Copy the embed code

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

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.

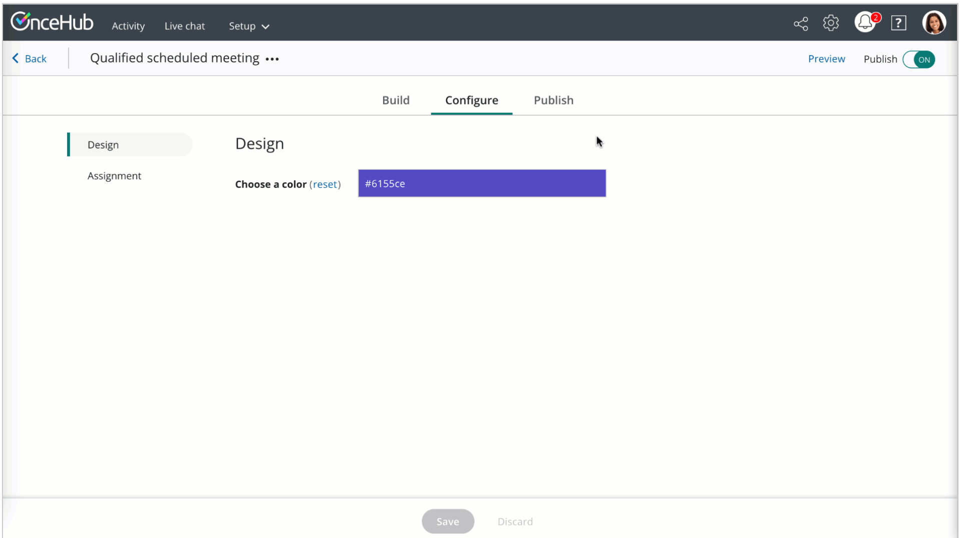


Figure 1: Copy the embed code

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.

Setting up a Zap for Routing Forms and Chatbots

Setting up a Zap can help automate your workflows by connecting your Chatbots and Routing Forms with other applications. Follow the instructions below to set up your Zap efficiently:

Saving Routing Form and Chatbot data to a Contact

To ensure your guests' data is passed to Zapier, you must first map each Interaction to a specific **Contact field**. Follow these steps to configure it properly:

Step 1: Access the Flow Builder

- Open the **Routing Forms/Chatbots Lobby** by using the left-hand navigation.
- Edit the relevant **Routing Form** or **Chatbot** and navigate to the **Flow Builder** tab.

Step 2: Save the Data to a Contact Field

- Select the specific **Interaction** you want to map.
- In the panel on the right:
  - Choose the option to save the data **In the conversation and as a contact field**.
  - Select the appropriate contact field from the dropdown menu for storing the data.

By completing these steps, your guests' data will be properly mapped and ready to flow into Zapier for seamless automation.

Setting up the Zap

After mapping your data in OnceHub, follow these steps to create a Zap that retrieves the correct contact when a guest engages with you.

Step 1: Open the Zapier pop-up

1. **Navigate to Zapier Settings:**
   1. Click the gear icon located in the top-right corner of the page.
   2. Select **Zapier** from the dropdown menu.
2. **Initiate Zap Creation:**
   1. Go to the **Add Zaps** section.
   2. Search for the application with which you want to create a Zap.

Step 2: Choose a Template

1. A list of Zapier templates will appear below. Select the one that best fits your needs.

2. Click **Add Zap** to use your chosen template.

Step 3: Configure the Trigger Step

1. Confirm the **Trigger event** and OnceHub account that should be used.
   - For example, you can use the **Conversation Closed** trigger to have the Zap trigger whenever a guest is finished engaging with a Routing Form.
2. Complete the test step to ensure the trigger functions correctly.

Step 4: Add a New Zap Step

1. In the flowchart, click on the + (Add step) button to introduce a new step.
2. Choose **OnceHub** from the list of applications.

Step 5: Add the Find Contact Action

1. Select **Find Contact** from the Action event dropdown.
2. Click **Continue** to proceed to the Configure step .
3. Select **Contact ID** from the Find Contact by dropdown.
4. Click the **+** and select **Conversation Contact** for the **Value** field.
5. Complete the test step to verify the action.

Step 6: Mapping Data in the Final Action

1. In the Action for the app where you're sending the contact data, go to its Configure step .
2. Add values to any fields you need by clicking the **+**.
3. Select **Find Contact in OnceHub**, then map the data to the corresponding OnceHub contact fields.

Completion

By following these steps, you'll successfully connect your Routing Forms and Chatbots so that you can use the retrieved contact data to streamline your workflows in Zapier.

Getting started with instant calls

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.

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.

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.

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.

Integrating with your CRM [New]

Integrating your CRM with OnceHub ensures that as soon as a guest has interacted with any of our product features, a contact is created/updated in OnceHub with their captured information. This is then used to automatically update the corresponding record in your CRM.

By integrating your CRM, you can streamline data management and enhance the accuracy of your records.

Benefits of CRM Integration

By integrating your CRM with OnceHub, you can:

- **Centralize Data Management:** Automatically sync booking details, keeping all client information in one place.
- **Update Contact Records:** Enrich CRM profiles with new bookings to provide a comprehensive view of client interactions.
- **Automate Lead Tracking:** Create or update leads automatically whenever a guest books a meeting.
- **Save Time:** Eliminate manual data entry by syncing OnceHub data to your CRM effortlessly.

Integrating OnceHub with your CRM not only streamlines data flow but also ensures your team has the latest client insights at their fingertips.

Supported CRMs

OnceHub offers native integrations with two leading CRMs:

- **Salesforce**
- **HubSpot**

If you're using a different CRM, you can still connect OnceHub via **Zapier** or the **OnceHub API**. These options let you automate workflows and push booking data directly to your system.

Integrating OnceHub with HubSpot [New]

Using OnceHub's native integration with HubSpot saves you time, ensures accurate data transfer, and enhances your team's ability to manage customer relationships effectively. Here's what this integration helps you achieve:

- **Send Data Effortlessly:** Automatically send information captured in OnceHub (such as from booking calendars, routing forms, or chatbots) to Contacts in your HubSpot database.
- **Track Meetings Automatically:** Ensure that any meeting booked through OnceHub is automatically recorded in HubSpot under the associated Contact.

How to integrate OnceHub with HubSpot

To begin using HubSpot with OnceHub, you'll need to integrate by following these steps:

1. Click the gear icon in the top-right corner, then select **CRM**.
2. Click on the **HubSpot** tile.
3. Click **Connect** and follow the instructions in the pop-up to complete the integration process.

Note: The integration must be completed by the Super Administrator of your HubSpot account. Only users with this role have the necessary permissions to authorize and configure the integration between HubSpot and OnceHub.

Mapping OnceHub Fields to HubSpot

Click on **Configure field mapping** to begin configuring how OnceHub fields are mapped to HubSpot.

Contacts

In the **Contacts Tab**, use the dropdown menus to map OnceHub Contact fields to the corresponding HubSpot contact fields.

- Add fields by clicking the **+ Add mapping** icon.
- Remove fields by clicking the **X** icon next to the field you want to delete.
- Use the **Overwrite** toggle to choose whether existing HubSpot data should be overwritten.

To send responses collected from booking calendars, routing forms or chatbots, you will need to specify that responses should be saved to a specific contact field. This can be done in the settings for questions in your booking calendar forms, routing forms and chatbots.

Note: Only HubSpot contact fields compatible with the specific OnceHub Contact fields you select will be available in the dropdown for mapping.

Meetings

In the **Meetings Tab** you will see to which fields the details from any meeting made in **Booking Calendars** are mapped to.

Integrating OnceHub with Salesforce [New]

Using OnceHub's native integration with Salesforce saves you time, ensures accurate data transfer, and enhances your team's ability to manage customer relationships effectively. Here's what this integration helps you achieve:

- **Send Data Effortlessly:** Automatically send information captured in OnceHub (such as from booking calendars, routing forms, or chatbots) to contacts and leads in Salesforce.
- **Track Meetings Automatically:** Ensure that any meeting booked through OnceHub is automatically recorded in Salesforce as an event or case.

How to Integrate OnceHub with Salesforce

To begin using Salesforce with OnceHub, you'll need to integrate by following these steps:

1. Click the gear icon in the top-right corner, then select **CRM**.
2. Click on the **Salesforce** tile.
3. Click **Connect** and follow the instructions in the pop-up to complete the integration process.

Note: The integration must be completed by the System Administrator of your Salesforce account. Only users with this role have the necessary permissions to authorize and configure the integration between salesforce and OnceHub.

New Contacts and Meetings in OnceHub

Within the Salesforce integration you can choose what should happen whenever new Contacts and meetings are created in OnceHub

Accessing the integration

1. Click the gear icon in the top-right corner, then select **CRM**.
2. Click on the **Salesforce** tile.

Choosing what happens for new Contacts.

Under the **When New Contacts are Created In OnceHub** section you can choose whether new OnceHub Contacts create or update a **lead** or **contact** in Salesforce.

Choosing what happens for new Meetings

Under the **When New Meetings are Scheduled in OnceHub** section you have the following options for what should happen when a new meeting is booked:

- Create events in Salesforce for all Meetings
- Create cases in Salesforce for meetings booked from specific Booking Calendars. You can use the dropdown to select which Booking Calendars this should apply for.

Mapping OnceHub Fields to Salesforce

Click on **Configure field mapping** to begin configuring how OnceHub fields are mapped to Salesforce.

Contacts and Leads

In the **Contacts** and **Leads Tabs** you can use the dropdown fields to map the OnceHub Contact fields to the relevant Salesforce fields.

- Add fields by clicking the **+ Add mapping** icon.
- Remove fields by clicking the **X** icon next to the field you want to delete.
- Use the **Overwrite** toggle to choose whether existing Salesforce data should be overwritten.

To send responses collected from booking calendars, routing forms or chatbots, you will need to specify that responses should be saved to a specific contact field. This can be done in the settings for questions in your booking calendar forms, routing forms and chatbots.

Note: Only Salesforce fields compatible with the specific OnceHub Contact fields you select will be available in the dropdown for mapping.

Events and Cases

In the **Events** and **Cases Tabs**, you can use the dropdown fields to map meeting details to the relevant Salesforce fields.

- Add fields by clicking the **+ Add mapping** icon.
- Remove fields by clicking the **X** icon next to the field you want to delete.

Note: Only Salesforce fields compatible with the specific OnceHub Meeting fields you select will be available in the dropdown for mapping.

Using Fallback Values in CRM Field Mapping

Fallback values in OnceHub field mapping help ensure your Salesforce records stay complete and reliable, while also preventing any interruptions in the integration process due to missing booking data.

How Fallback Values Work

When your Salesforce instance includes required fields, OnceHub automatically identifies them and lets you assign a fallback value during the mapping setup. This ensures all necessary fields in Salesforce are populated, avoiding errors or incomplete records while maintaining consistent workflows.

Integrating with Zapier

OnceHub utilizes Zapier, an Integration Platform as a Service (iPaaS), to automate data movement between your essential applications. By connecting OnceHub to Zapier's extensive network of over 1,000 apps, including CRM, invoicing, and marketing platforms, you can seamlessly integrate OnceHub's functionalities into your daily workflows.

This integration simplifies processes and ensures data consistency, enhancing your overall operational efficiency.

Understanding Zapier's Automated Workflows (Zaps)

Zaps are automated workflows that connect two or more applications through Triggers and Actions:

- **Trigger:** An event in one app that initiates the Zap.
- **Action:** The task Zapier performs in a second app using data from the Trigger.

For example, you can create a Zap that automatically adds or updates a contact in your CRM every time a new booking is made, or a visitor engaged with a chatbot.

Connecting OnceHub with Zapier

1. **Navigate to Zapier Settings:**
    - Click the gear icon located in the top-right corner of the page.
    - Select **Zapier**.
2. **Link Your Zapier Account:**
    - Go to the **Manage Zaps** tab.
    - Click **Connect** to link your Zapier account.

Key Features of Zapier Integration

- **Comprehensive Triggers:** Automate workflows based on lifecycle events, such as booking scheduling, completion, rescheduling, or cancellations.
- **Wide App Ecosystem:** Integrate with tools across categories like CRM (e.g., Salesforce, HubSpot), invoicing (e.g., QuickBooks), and marketing (e.g., Mailchimp).
- **Flexible Automation:** Create multi-step Zaps to handle complex workflows, linking multiple apps in one automation.
- **Dynamic Updates:** Ensure real-time synchronization of booking data across all integrated tools.

- **Customizable Workflows:** Tailor Zaps to suit unique operational needs, from simple tasks to advanced multi-app processes.

Recommended Zapier Triggers for OnceHub

Zapier offers a variety of Triggers to meet your specific needs:

- **Booking Triggers:** Use these to initiate Actions based on Booking Lifecycle events, such as bookings scheduled or canceled.
- **Conversation Triggers:** Use these to trigger Actions when someone interacts with your Routing Forms or Chatbots.

Setting up Zaps for OnceHub Features

Each OnceHub feature requires a tailored Zap setup process. Refer to these guides for specific instructions:

- **Creating Zaps for Booking Calendars**
- **Creating Zaps for Routing Forms and Chatbots**
- **Creating Zaps for Booking pages [Classic]**

Custom Booking Calendar integrations with webhooks and APIs [New]

The OnceHub API and webhook features empower developers and technically skilled users to create custom integrations for **Booking Calendars**, allowing seamless integration with third-party applications and services.

OnceHub API

The OnceHub API provides direct and reliable access to your booking data, enabling advanced integrations. With the API, you can:

- **Access Booking Details:** Retrieve information such as meeting times, guest details, and locations.
- **Retrieve Booking Calendars:** Obtain a list of all your **Booking Calendars** for management or reporting.
- **Manage the Meeting Lifecycle:** Create or cancel meetings programmatically to maintain control over bookings.
- **Generate One-Time Links:** Create unique booking links for specific use cases.
- **Pre-Populate Booking Forms:** Use URL parameters to fill in guest details automatically for a faster booking process.

For more details, visit the **OnceHub Developer Center**.

Webhooks

Webhooks provide automatic data delivery whenever a booking lifecycle event occurs, such as a new meeting, reschedule, or cancellation.

Examples of What You Can Do with Webhooks:

- **Send Guest Details:** Automatically transmit guest details to your server when a booking is made.
- **Integrate with Other Systems:** Support integrations with applications, services, or data warehouses to streamline and automate processes.

To explore webhook setup, check out the **Webhooks documentation**.

Why Use APIs and webhooks?

Custom integrations using the OnceHub API, webhooks, enhance flexibility and functionality, enabling you to do things like:

- Add full scheduling capabilities to your apps or agents
- Automation of marketing and sales campaigns
- Automation of customer support workflows
- Reporting and analysis of activity
- Integrate event triggers into workflows

- Develop custom CRM integrations

Troubleshooting CRM Integration Issues [New]

CRM integrations play a crucial role in ensuring seamless data synchronization between systems. When issues arise, they can disrupt workflows and affect productivity. Addressing these issues promptly helps ensure your data sync is smooth and uninterrupted.

Token Expired

Symptoms:

- The integration stops syncing.
- You may see an error message indicating the token has expired.

Resolution:

1. Navigate to the **CRM integrations page** in OnceHub.
2. Click the **Reconnect** button.
3. Follow the authentication process as prompted to reestablish the connection.

Access Revoked

Symptoms:

- The integration stops syncing.
- An error message states that access has been removed or revoked.

Resolution:

1. Log in to your CRM account.
2. Check your admin settings or permissions to ensure the integration has the **required access rights**.
3. Reauthorize the integration connection through OnceHub.

Too Many Accounts Connected (Salesforce-specific)

Symptoms:

- Error message about exceeding the 5-account limit in Salesforce.

Resolution:

1. Review the connected accounts in Salesforce.
2. Disconnect unnecessary accounts to free up a slot for OnceHub.

Click **here** to learn more about this restriction in Salesforce.

API Access Disabled (Salesforce-specific)

Symptoms:

- Error message indicating API access is not enabled.

Resolution:

1. Verify that the connected Salesforce account has API access enabled.
2. If API access is not available, connect a different Salesforce account that includes this permission.

Field Mapping Errors

Symptoms:

- Data sync fails due to missing or incorrect field mapping.

Resolution:

1. Navigate to the field mapping section in OnceHub.
2. Review and adjust the mappings to align with your CRM’s fields.
3. Save changes and test the connection.

Best Practices for CRM Integration Maintenance

To prevent integration issues from occurring in the future, follow these best practices:

- **Use a dedicated admin account:** Always use an admin account for integrations to avoid permission conflicts.
- **Monitor integration logs regularly:** These logs can help you identify and address potential issues early on.
- **Keep your CRM updated:** Ensure that your CRM version and permissions are compatible with OnceHub.

Frequently Asked Questions

Here are answers to some of the most common questions about CRM integrations:

- **What should I do if my integration is still not working?** Double-check that both your CRM and OnceHub configurations are correct. If problems persist, please **reach out to our support team** to assist.
- **How do I find out if my Salesforce account has API access?** Salesforce API access is typically included with Enterprise Editions and higher. You can verify this in your Salesforce account under "System Administrator" permissions.
- **Can I connect multiple CRM accounts to OnceHub?** Yes, OnceHub supports multiple CRM integrations, provided the correct permissions and account configurations are in place.

Managing Your Profile in OnceHub

Your OnceHub profile serves as the central hub for customizing settings, updating personal information, and managing preferences to optimize your user experience. This guide provides detailed instructions for navigating and updating various aspects of your profile.

Accessing Your User Profile

1. Click the profile icon located in the top-right corner of your screen.
2. Select **Profile Overview** from the dropdown menu.

Understanding Your Profile Overview

The Profile Overview section provides a concise summary of your OnceHub account, including:

- Your current OnceHub subscription plan.
- Your assigned role within OnceHub.
- All Booking links associated with your profile.
- A list of connected calendars and integrations.
- Your basic personal account information.

Updating Personal Account Information

1. Click the three dots (...) to the right of your name.
2. Choose from the following options:
   - Change your name and profile picture.
   - Edit your email ID.
   - Choose whether to receive product announcements.

Note: Administrators can edit another user's email ID but must enter their own password to confirm the changes.

Managing Your Availability in OnceHub

Effectively managing your availability is essential for maximizing client engagement.

OnceHub offers various interaction methods, but configuring availability settings is important for both Live Engagements and Scheduled Meetings interactions, ensuring a superior client experience. Each option allows you to control your availability for different interaction types.

Scheduled Meeting Availability

Control when clients can book meetings by setting recurring availability or date-specific overrides. This ensures bookings occur only during your specified working hours.

Configuring scheduled meeting availability in your profile differs depending on whether you are using **Booking Calendars [New]** or **Booking Pages [Classic]**.

If you are using Booking Calendars [New]

You can configure when and where you're free to meet directly within your profile settings, by setting recurring working hours and utilizing multi-location availability.

For detailed instructions, see the **Booking Calendar availability and location options** article.

If you are using Booking Pages [Classic]

You will set your availability within your profile settings, while meeting locations are configured within each individual Booking Page.

Live Engagements

Enable real-time interactions, such as instant chats or calls, by toggling your live engagement availability on or off manually or setting automatic availability based on your working hours.

User Integrations

Enhance scheduling workflows by **connecting to productivity suites and third-party apps**, such as calendars and video conferencing tools.

View or Update Integrations

The **User Integrations** section displays all third-party services linked to your profile. You can disconnect or reconnect integrations by clicking on the integration tile.

Notifications

If you are using Booking Calendars [New]

You will configure your personal booking notification preferences within the **User Notifications** section of your profile.

For a detailed guide, please see our **User Notifications for Booking Calendars article**.

If you are using Booking Pages [Classic]

You will configure your personal booking notification preferences within the **User Notifications** section of each individual Booking page.

To receive SMS booking notifications:

1. Add your mobile number to the **SMS Notifications** section of your Profile.
2. Enable SMS notifications within the **User Notifications** section of the applicable Booking Page.

Customizing Your Date and Time Settings

Personalize how dates and times appear within your account:

- Set the Default Time Zone to be used alongside your availability settings.
- Select your preferred date format.
- Choose between a 24-hour or 12-hour clock.
- Define the start day of the calendar week.

Changing your Password

Update your OnceHub password in the **Password** section. Passwords must be at least six characters long and include lowercase letters and numbers.

Learn more about OnceHub password policies

Enabling Two-Factor authentication

Two-factor authentication (2FA) adds a vital security layer to your OnceHub account. You can select your preferred verification method by toggling it on or off within the Two-Factor Authentication section.

With 2FA enabled, logging in requires two steps:

1. Your OnceHub account password.
2. A unique verification code which will be sent to your chosen method:
    - **Email:** Receive codes via email.
    - **SMS:** Receive codes via text message.
    - **Authenticator App:** Use an app like Google Authenticator for codes.

Defining Permissions

Under Permissions the Account owner and Administrators can choose if Member users are allowed to edit their own availability.

Account Access and Password Recovery

We understand that accessing your account is crucial. This article provides clear instructions to help you regain access, whether you've forgotten your password, your account is locked, or your trial has expired.

Password Recovery

Forgotten Password

If you have forgotten your password, you can reset it by clicking on the **Forgot your password?** link on the sign-in page and follow the instructions.

Password Reset Link Issues

If you have followed the **Forgot your password?** instructions provided above and have not received an email with the reset link, please ensure that you check all of your email folders, including your spam folder, for an email from mailer@oncehub.com.

If you are still unable to locate the email, please **contact our support team** for assistance.

Account Login

Forgotten or Inaccessible Login Email

If you've forgotten your login email or no longer have access to it, **contact our support team** and we will get you back into your account as securely and quickly as we can.

Account Locked

If your account has been locked, contact a OnceHub Administrator from your organization. Administrators can unlock user accounts by:

- Clicking the gear icon in the top-right corner.
- Selecting **Users**.
- Clicking the three horizontal dots next to the user's profile.
- Selecting **Restore access**.

If you are the sole Administrator and your account has been locked, or if you’re not sure who the Administrator for your own account is, please **contact us**.

Account locked due to payment failure

If your account has been locked while attempting to pay for your subscription, please **contact us** for assistance.

Trial Expiration

If your trial has expired and you need a bit more time to fully explore the features and capabilities of our products, **let our sales team know** and we'd be happy to assist.

Managing your account

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

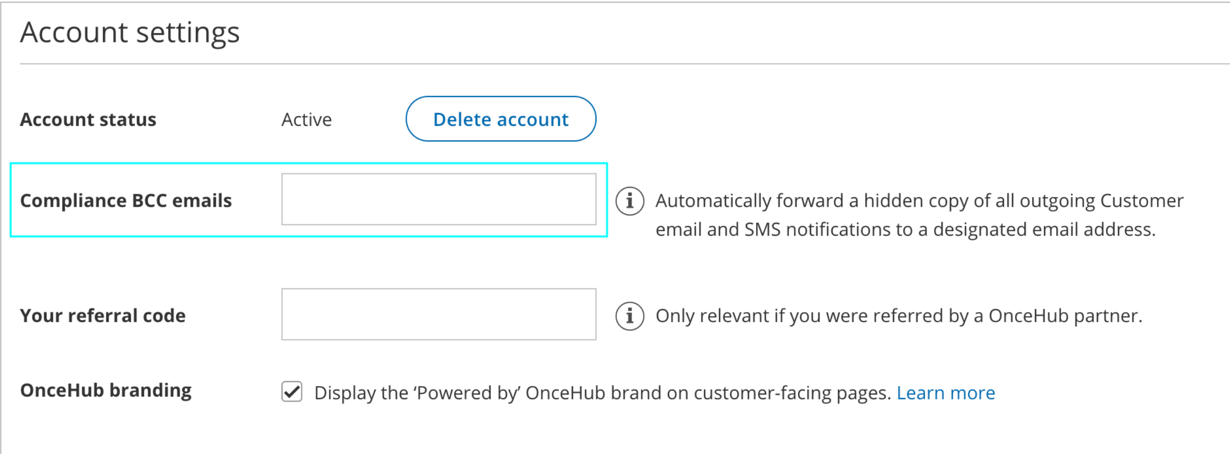
OnceHub gives you the ability to automatically forward a hidden copy of all outgoing Customer email and SMS notifications to a designated email address. This feature is especially important for organizations who are required to evaluate all sent messages for compliance purposes.

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.

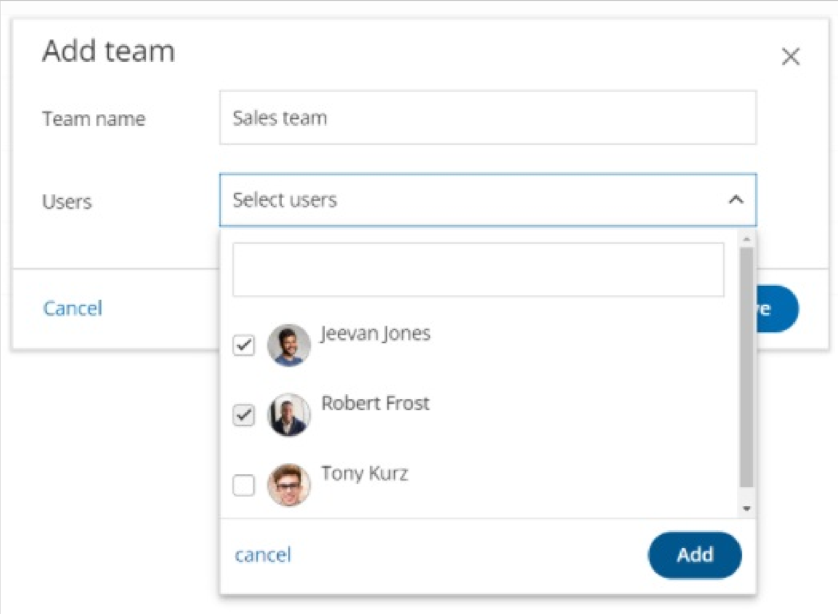


Figure 1: Creating a team and adding team members.

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

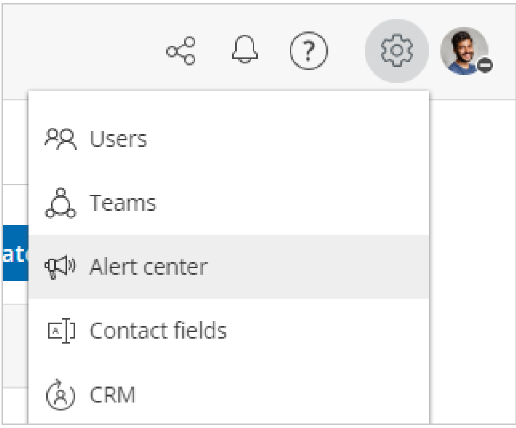
Note :

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

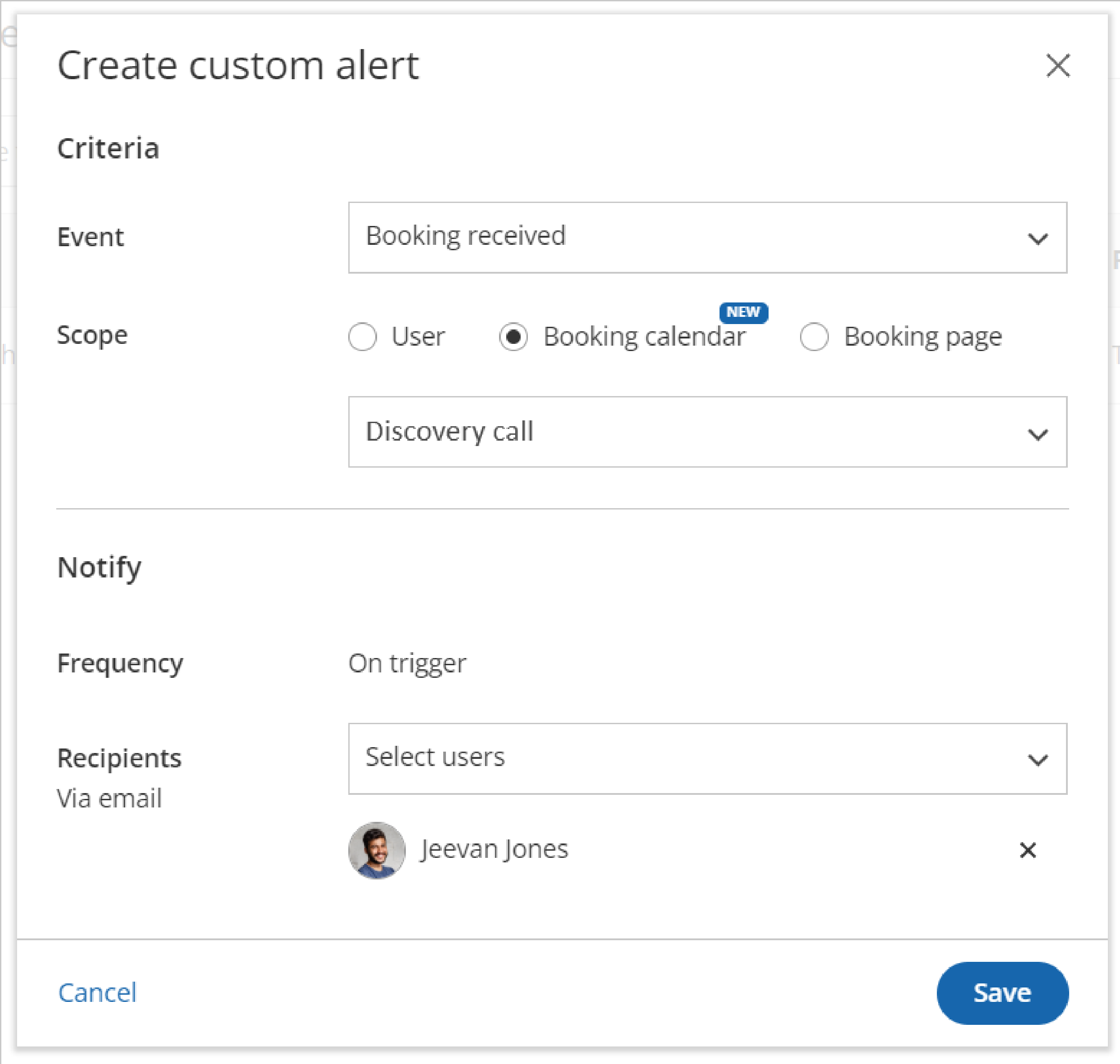
3. Select a **Scope**. This is the user, booking page, or booking calendar which will be the subject of the alert.
4. Depending on your choice above, click on the drop-down menu and select either a user, booking calendar, or booking page.
    - Whenever a booking is received, canceled, or rescheduled 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.

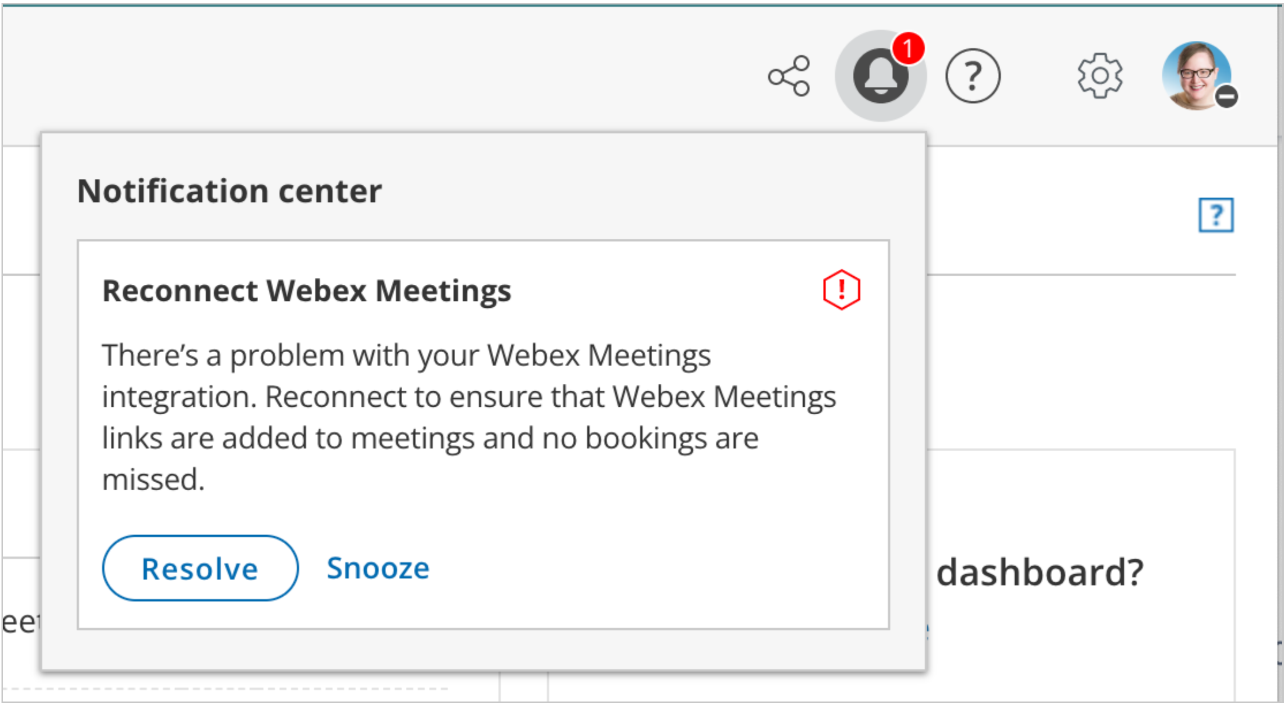


Figure 1: Notification center

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).

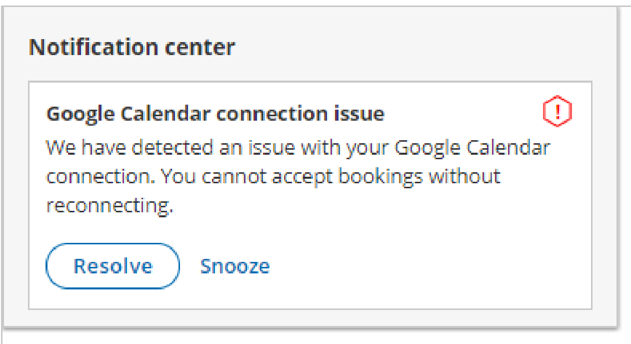


Figure 2: Issue example

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).

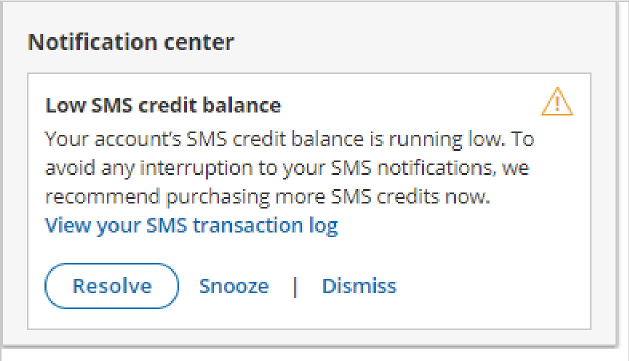


Figure 3: Warning example

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.

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.

Managing Seats in OnceHub

Seats provide access to OnceHub's scheduling and live engagement tools, required for users who directly interact with guests or accept booking appointments.

Users who manage administrative tasks, such as account settings or user profiles, do not require allocated seats.

How to Add or Remove Seats

Follow these steps to adjust the number of seats in your subscription:

1. Click the gear icon in the top-right corner.
2. Select **Billing** from the dropdown menu.
3. Click on **Add/remove seats**.
4. Use the **-** and **+** icons to set the desired number of seats for your account.
5. When finished, click **Update subscription** to save your changes.

Adjusting the Number of Seats: Subscription Effects

You can modify the number of seats in your subscription at any time. Here's how billing works based on your subscription type:

Adding seats:

- **For Monthly Subscriptions:** Costs for additional seats will be prorated and applied during your next billing cycle.
- **For Annual Subscriptions:** You will pay a prorated adjustment immediately for any added seats.

Removing seats:

- When removing seats, changes will take effect in future billing cycles.
- Refunds are not provided for charges that have already been processed.

Assigning Seats to Users

There are three ways to assign seats to users:

1. **While Adding Users:**
   - Seats can be assigned to a user at the time they are added to your account.
2. **From the Users Section:**
   - Click the gear icon in the top-right corner.

- Select **Users** from the dropdown menu.
- Click **Assign seats**, then use the dropdown menu to assign a seat to the desired user.

3. **From the User Profile:**

   - Click the gear icon in the top-right corner.
   - Select **Users** from the dropdown menu.
   - Click on the user you want to assign a seat to. This will open their user profile.
   - Click **Assign seat** to allocate a seat to them.

Unassigning Seats from Users

To unassign a seat from a specific user:

- Follow the above steps to access the **User Profile**.
- Once in their profile, click **Unassign seat** to remove their seat.

Canceling your Subscription

This guide explains how to cancel your paid subscription. If you're on a free trial or the basic plan, you'll need to delete your account instead.

Important Things to Know Before Canceling

Before you cancel, here are some key details to keep in mind:

Account Ownership

Only the Account Owner has the ability to cancel the subscription.

Account Retention Timeline

If you cancel your subscription or a payment fails, your account will be **suspended for 30 days**. After this period, it will be permanently deleted.

Billing and Adjustments

Even if you cancel, any outstanding charges for **added seats or prorated adjustments** will still be processed.

Resuming Your Subscription

You can resume your subscription at any time before the end of the billing cycle.

How to Cancel Your Subscription

Follow these steps to cancel your paid plan:

Navigating to Billing

1. Click on the gear icon in the top right.
2. Select **Billing**.

Cancelling the subscription

1. Scroll to the bottom of **Billing**.
2. Click on **Cancel subscription**.

On the cancellation page, you'll see important information, including:

- How long your account will remain active (you can continue using it until the end of your billing cycle).
- When your account will be permanently deleted if not reactivated.

Confirming the cancellation

1. Check the box labeled **Yes, I want to cancel** to confirm your intent to cancel.
2. Provide feedback as to why you are cancelling your subscription (optional).
3. Click the **Cancel subscription** button to finalize the process.

After Canceling Your Subscription

Here's what happens after you cancel:

Account Suspended State

After the billing cycle ends, your account enters a 30-day suspended state. During this time, you can reactivate the subscription by clicking **Reactivate subscription** and selecting the number of seats you need. The payment method linked to your account will then be charged.

Account Deletion

If the subscription is not reactivated during the 30-day suspension period, your account will be permanently deleted.

For Free Trial or Basic Plan Users

If you are on the free trial or basic plan and wish to stop using our services, you will need to delete your account instead of canceling a subscription. Please see our **Delete Your Account article** for a detailed guide.

Deleting your account

This guide explains how to delete your account if you are on a free trial or the basic plan. If you're on a paid plan, you'll need to cancel your subscription instead.

You can delete your account through either the **Settings and Permissions** or the **Billing** sections of your account settings.

Deletion via Settings and Permissions:

1. Click the gear icon located in the top-right corner.
2. Select **Settings and Permissions**.
3. Click **Delete account**.
4. Follow the on-screen prompts to complete the deletion process.

Deletion via Billing:

1. Click the gear icon in the top-right corner.
2. Select **Billing**.
3. Click the three horizontal dots positioned near Billing in the top-left corner.
4. Click **Delete account**.
5. Follow the on-screen prompts to finalize the account deletion.

Important Considerations Before Deleting

Account deletion permanently removes:

- All data stored within OnceHub.
- Booking Calendars, Chatbots and Routing forms.
- Stored credit card and billing information.
- All user accounts and associated personal data.

Note: Scheduled meetings that have already synched with external calendars, such as Google Calendar, will remain unaffected.

Alternative to Deleting Your Account

If you'd like to preserve the account but you are not actively using it, you can reduce your Seats to 1 to reduce the monthly charge while keeping the account active.

This can be done from the **Billing** section found by clicking on the gear icon, then **Billing**.

For Paid Plan Users

If you are on the paid plan and wish to stop using our services, you will need to cancel your subscription instead of deleting your account. Please see our **Cancelling Your Subscription article** for a detailed guide.

Frequently Asked Questions: Account Deletion

Can I recover my data after deleting my account?

No, account deletion is permanent. All data, including Booking Calendars, and personal information, will be permanently erased.

Will scheduled meetings still take place if I delete my account?

Yes, any scheduled meetings already synced with external calendars (e.g., Google Calendar, Outlook) will remain unaffected. However, OnceHub will no longer manage these events.

Can I delete my account if I am not the Account Owner?

No. Only the Account Owner can delete the account. If you're a regular user, contact your Account Owner for assistance.

How long is my account data retained after the account is deleted?

- 30 days after the free trial has expired.
- 6 months of no activity in the free Basic plan.

Location and Rooms [New]

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.

Alert Center

The Alert Center is designed to keep you informed about all booking activities within your account, including new bookings, cancellations, and reschedules. By setting up alerts, you can ensure that the right people are notified at every stage of the booking process, allowing for better oversight and management.

Accessing the Alert Center

To access the Alert Center:

1. Click on the gear icon in the top-right corner of your account.
2. Select **Alert Center** from the dropdown menu.

Creating a New Alert

Creating a new alert allows you to customize notifications based on specific booking events and users. Here's how to set one up:

1. Click on **Create alert** in the Alert Center interface.
2. **Define alert criteria** in the **Criteria** section of the pop-up window:
   - **Event:** Select the **Event** for which you want to receive alerts. Options include booking cancellations, confirmations, and reschedules.
   - **Scope:** Choose the **Scope** of the alert. You can select alerts for a specific user, Booking Calendar, or Booking Page. Then, choose the specific item from the dropdown menu.
3. Specify alert recipients in the **Notify** section:
   - Use the **Recipients** dropdown to select the users who should receive the alert emails.

Managing Existing Alerts

You can easily modify, duplicate, or delete existing alerts to keep your notifications up-to-date and relevant. To manage an alert:

1. Locate the alert you wish to manage within the Alert Center.
2. Click the three dots (...) next to the alert.
3. Choose one of the following options:
   - **Edit:** Modify the alert's settings, such as event type, scope, or recipients.
   - **Duplicate:** Create a new alert with the same settings as the existing one, allowing for quick setup of similar alerts.
   - **Delete:** Permanently remove the alert from your account.

Note: If the user, who has been scheduled for a booking, has their email notifications turned off, then users on the global alert will not receive any notifications either.

Powered by OnceHub Banner

By default, the **Powered by OnceHub** banner appears in the following areas:

- Your Booking Links
- The bottom of your Routing Forms
- The bottom of your Chatbots
- The body of emails sent to your guests

Important: Removal of the banner is not available on the free Basic plan. Upgrading to a paid plan unlocks the ability to do so.

Removing the Banner

Follow the steps below to disable the **Powered by OnceHub** banner.

Navigating to Settings and Permissions:

1. Click the gear icon in the top right corner.
2. Select **Settings and Permissions** from the dropdown menu.

Disabling the banner:

1. Switch the **Powered by OnceHub Banner** toggle to off.
2. Click **Save**.

To further strengthen your brand, customize your theme and send notifications from your own domain email address.

Explore Related Branding and Customization Options:

- **Customizing Your Theme (Booking Pages)**

Understanding SMS delivery statuses

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

User Roles Overview

This article provides an overview of the various user roles within OnceHub, detailing the core permissions associated with each role. Understanding these roles is crucial for effectively assigning permissions and responsibilities.

User Roles

OnceHub offers four primary user roles: Account Owner, Administrator, Team Manager, and Member.

Account Owner:

- Automatically assigned to the user who created the account.
- Can manage all settings and transfer ownership to another user.
- Has the same permissions as an administrator, with additional ownership privileges.

Administrator:

- Can manage users, teams, and account settings.
- Has full access to billing and subscription management.
- Cannot transfer account ownership.

Team Manager:

- Manages a specific team of users within the account.
- Can create booking links and edit profiles for team members.
- Has no access to billing or account-wide settings.

Member:

- Has limited access to account features.
- Can create and manage their own booking links but are restricted from editing others' links unless explicitly granted permissions.

For a more detailed view of the permissions each role has, you can view **User Roles and their Permissions**.

Frequently Asked Questions (FAQs)

Can a user be assigned both Administrator and Team Manager roles?

No. A user can only hold one role at a time. However, a Team Manager can manage multiple teams.

Do all users require a seat?

No. Users without a seat can still access many features, such as updating availability or receiving notifications. However, they cannot take bookings or host live engagements.

Can the Account Owner transfer their ownership role?

Yes, the Account Owner can transfer ownership to another user via their profile settings. Upon transfer, the previous Account Owner will become an Administrator.

User Roles and their Permissions

This guide clarifies the permissions granted to each user role within OnceHub: Account Owner, Administrator, Team Manager, and Member. Each section details specific functionalities, summarized in easy to understand tables.

The Account Owner: Ultimate Control

The Account Owner holds the highest level of access and permissions in OnceHub. While possessing all Administrator capabilities, they also have exclusive rights:

- **Account Deletion:** Only the Account Owner can permanently delete the OnceHub account.
- **Ownership Transfer:** The Account Owner can transfer their role to another user within the account. Upon transfer, the previous Account Owner becomes an Administrator.
- **Non-Transferable Role:** No other user can transfer account ownership, ensuring the Account Owner maintains control until a formal transfer.

These privileges allow the Account Owner to maintain overall authority while delegating responsibilities for operational efficiency.

Subscription Management

Administrators have full access to manage and alter subscription plans, purchase seats, and add SMS credits, while Team Managers and Members can not make any changes.

Role	Manage Subscriptions	Purchase Seats	Purchase SMS Credits
Administrator	Yes	Yes	Yes
Team Manager	No	No	No
Member	No	No	No

Seats Management

Seat management permissions control the allocation and removal of seats within the platform.

Role	Assign Seats	Unassign Seats	Purchase Additional Seats
Administrator	Yes	Yes	Yes
Team Manager	Yes (team only)	Yes (team only)	No

Member	No	No	No

Key Notes: Team Managers can manage seats for their team members only. Members cannot assign or manage seats.

User Management Permissions

User management permissions encompass editing roles, assigning team managers, and transferring ownership, as detailed below.

Role	View All Users	Edit User Roles	Assign Team Manager Role	Delete Users
Administrator	Yes	Yes	Yes	Yes
Team Manager	Only team members	No	No	No
Member	No	No	No	No

Key Notes: Administrators manage roles, Team Managers handle teams, and Members have no user management permissions.

Integrations

Users can connect and manage integrations, but with varying levels of access based on their role.

Role	Connect Integrations	Manage Settings	Disconnect Integrations
Administrator	Yes (own and account integrations)	Yes	Yes (own and account integrations)
Team Manager	Yes (own only)	Yes (team only)	Yes (own only)
Member	Yes (own only)	Yes (own only)	Yes (own only)

Key Notes: Members can manage their personal integrations but cannot alter settings or disconnect integrations for others.

Booking Calendars Permissions

Booking calendar permissions dictate who can create and manage calendars, including team-specific usage, as detailed below.

Role	Create Calendars	Edit Calendars	Delete Calendars	Set Hosts
Administrator	Yes	Yes	Yes	Yes
Team Manager	Yes	Yes	Yes (team only)	Yes (team only)

Member	Yes	Yes (own only)	Yes (only own)	No

Key Notes: Administrators have unrestricted access. Team Managers can work on calendars within their team, while Members are limited to their personal ones.

Chatbots Permissions

Chatbot permissions determine which roles can create, edit, and publish bots.

Role	Create Chatbots	Edit Chatbots	Publish Chatbots	Delete Chatbots
Administrator	Yes	Yes	Yes	Yes
Team Manager	Yes (team only)	Yes (team only)	Yes (team only)	Yes (team only)
Member	Only own	Only own	Only own	Only own

Key Notes: Administrators need to give Team Managers and Members access to Chatbots to be able to work with them.

Routing Forms Permissions

Routing form permissions cover who can create, edit, and publish forms for user workflows.

Role	Create Forms	Edit Forms (Team)	Publish Forms	Delete Forms
Administrator	Yes	Yes	Yes	Yes
Team Manager	Yes (team only)	Yes (team only)	Yes (team only)	Yes (team only)
Requires permission	Only own	Only own	Only own	Only own

Key Notes: Administrators need to give Team Managers and Members access to Chatbots to be able to work with them.

Booking Pages Permissions

Booking page permissions define user capabilities for creating, editing, deleting, and managing ownership of booking pages, as outlined below.

Role	Manage Event types	Manage Booking pages	Manage Master pages
Administrator	Yes	Yes	Yes
Team Manager	Yes (team only)	Yes (team only)	No

Member	No	Only own	No

Key Notes: Only administrators can create or delete Event types. Team Managers can only assign them to Booking pages owned by their team.

Final Notes

- **Tiered Permissions:** This guide reflects general permissions for platform features. However, specific permissions for Booking Pages may be configured further by Administrators.
- **Role-specific Functionality:** Always consider team-specific roles when granting permissions. Team Managers control their teams, but cannot access areas outside of their scope.
- **Support:** For any adjustments or unique setup needs, reach out to your account administrator or technical support.

User management and seats

This guide details how to manage users within your OnceHub account, including accessing user management and understanding the available administrative options.

Accessing User Management

Navigate to Users:

1. Click on the gear icon located in the top right corner.
2. Select **Users** from the dropdown menu.

Adding New Users to Your Account

To invite new users to join your account:

- Click the **Add Users** button.
- While inviting users, you will be taken through the following steps:
  - Assign them a role (e.g., Administrator, Team Manager, etc.).
  - **Allocate a seat** if they will be engaging with guests.
  - (Optional) Add them to a specific team.
  - Confirm the user details and send email invitations.

Managing Existing Users

To manage the profiles of existing users, locate the three dots (...) next to the user's name. This will bring up the following options:

- **Edit user profile**
  - This allows you to change their profile settings such as their User notifications and **Availability**.
- **Edit Role**
  - This allows you to change the role currently assigned to the user, based on their responsibilities. For more information on user roles, please check our **Roles Overview article**.
- **Delete user**
  - This allows you to permanently remove a user from the account. Note that this action is irreversible.
- **Resend Invitation**

- If a user has not signed in within 24 hours of being invited, you can use this option to resend their invitation.

Frequently Asked Questions

What happens when a user is deleted?

- All of the user’s objects are transferred to an Administrator with an assigned seat.
- All of the user’s Booking Calendars are unpublished.
- Any assigned seat becomes available for reassignment.
- Existing bookings and their linked calendar events remain unaffected.

Do all users require a seat?

No, only users who will be engaging with guests require an assigned seat. Users who only perform administrative tasks in the account do not require a seat.

Managing Payment Methods

OnceHub supports a variety of payment methods, giving you the flexibility to update them as needed. However, if you're using PayPal, keep in mind that subscription changes cannot be made within 7 days of your renewal date.

Accepted Payment Methods

- Credit Cards (e.g., Visa, MasterCard, etc.)
- PayPal

How to Access and Manage Payment Methods

Follow these simple steps to manage your payment methods:

1. Click the gear icon in the top-right corner of your OnceHub account, then select **Billing**.
2. From the left-hand menu, choose **Payment Methods**.

Adding a New Payment Method

To add a new payment method:

1. Go to the **Payment Methods** section.
2. Click the **Add payment method** button.

Managing Multiple Payment Methods

If you've added more than one payment method, one will serve as your primary payment method, which will be used for all payments. Secondary payment methods act as backups in case your primary method fails, ensuring uninterrupted service.

To change your Primary Payment Method:

1. Click the three dots (...) next to the payment method you want to set as primary.
2. Select **Make primary** from the dropdown menu.

Removing a Payment Method

- You can remove any payment method except the primary one.
- To remove it, click the three dots (...) next to the payment method and select **Remove**.

Benefits of Storing Multiple Payment Methods

Storing multiple payment methods offers:

- Uninterrupted subscription payment if your primary payment fails.
- Convenience when switching payment methods for purchases.
- Peace of mind that your account remains active without interruptions.

Managing Your Subscription

This article explains how you can manage your subscription in OnceHub, including steps to change your plan, adjust the number of seats, and understand the effects of these changes.

How to Change Your Subscription Plan

Follow these steps to upgrade or downgrade your subscription plan:

1. **Access the Billing Page:**
   - Click the gear icon in the top-right corner of the page and select **Billing** from the menu.
2. **Select Change Plan:**
   - Locate your current plan name on the Billing page and click on **Change plan**.
3. **Review Plan Options:**
   - You will see a detailed breakdown of all available subscription plans, including the features and benefits of each.
4. **Select the plan you would like to move to and confirm your choice:**
   - If upgrading , you'll gain immediate access to your new plan's features.
   - If downgrading , changes will take effect at the start of the next billing cycle.

Please note that once you upgrade to a paid plan you will not be able to downgrade to the free Basic plan. You will have to cancel your subscription and sign up again.

Adding or Removing Seats

Seats are assigned to users to allow them to engage with guests through OnceHub's scheduling and live engagement features.

- **For monthly subscriptions:** The cost for additional seats will be prorated and billed during your next billing cycle.
- **For annual subscriptions:** You'll immediately pay a prorated adjustment for the added seats.
- **Removing seats:** It will only take effect in future billing cycles. Refunds are not provided for charges that have already been processed.

You can make adjustments to the number of seats in your subscription at any time. For more information on seats, please see our **Managing Seats in OnceHub article**.

Switching Between Annual and Monthly Subscriptions

You can switch between annual and monthly subscriptions at any time by navigating to the Subscription section under Billing.

Here are a few important details to keep in mind:

- **Timing of Changes:** The switch will take effect on your next renewal date, not immediately upon making the change.
- **Discount for Annual Plans:** Annual subscriptions offer a 10% discount compared to monthly plans, providing cost savings if you choose this option.

Consider your needs and budget before making the change to ensure the plan best suits you.

Effects of Changing Your Subscription

Here's what happens when you make changes to your subscription:

1. **Billing Adjustment:**
   - If you upgrade or add seats during a billing cycle, prorated adjustments will apply.
   - Downgrading a plan or reducing seats takes effect in the following billing cycle.

2. **Feature Availability:**
   - Upgrading grants instant access to additional features.
   - Downgrading means features only available in the higher-tier plan will be disabled at the end of your current billing period.

3. **Payment Timing:**
   - If you're on an annual plan, you'll be immediately charged for any upgrades made mid-cycle. Monthly subscribers will see such charges reflected in their next bill.

If you have any questions, please feel free to **reach out to us**.

SMS Credits in OnceHub

In this article, you'll learn everything about SMS credits, including how they work, the pricing structure, and step-by-step instructions to purchase them.

What Are SMS Credits?

SMS credits allow you to send text-message notifications (e.g., booking reminders) to users and guests. Here's what you need to know:

- **Initial Credits:** Each account starts out with 25 free credits that can be used at any time.
- **Standard SMS Definition:** One credit is deducted per SMS message, defined as a message containing 160 characters or fewer.
- **Global Pricing:** The cost per SMS is the same worldwide. No additional charges or credits are deducted based on the recipient's location.

Pricing for SMS Credits

SMS credits are available in flexible packages to suit your needs. Below is the pricing breakdown:

SMS Credits	Cost (USD)	Cost Per Credit (USD)
100	$15.00	$0.15
200	$25.00	$0.125
500	$50.00	$0.10
1,000	$90.00	$0.09
2,000 or more	TBD	$0.08

How to Purchase SMS Credits

Follow these steps to buy SMS credits for sending booking notifications via text messages:

1. **Access Billing Settings:**
    - Click the gear icon located in the top-right corner of your account dashboard.
    - Select **Billing** from the dropdown menu.
2. **Initiate the Purchase:**

- Click on **Add credits** to start the purchasing process.

3. **Choose Credit Amount:**

   - From the dropdown menu, select the number of SMS credits you would like to purchase.

4. **Confirm and Pay:**

   - Click **Proceed to payment**.
   - You will be directed to the payment confirmation screen to complete the transaction.

Introduction to billing [Classic]

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.

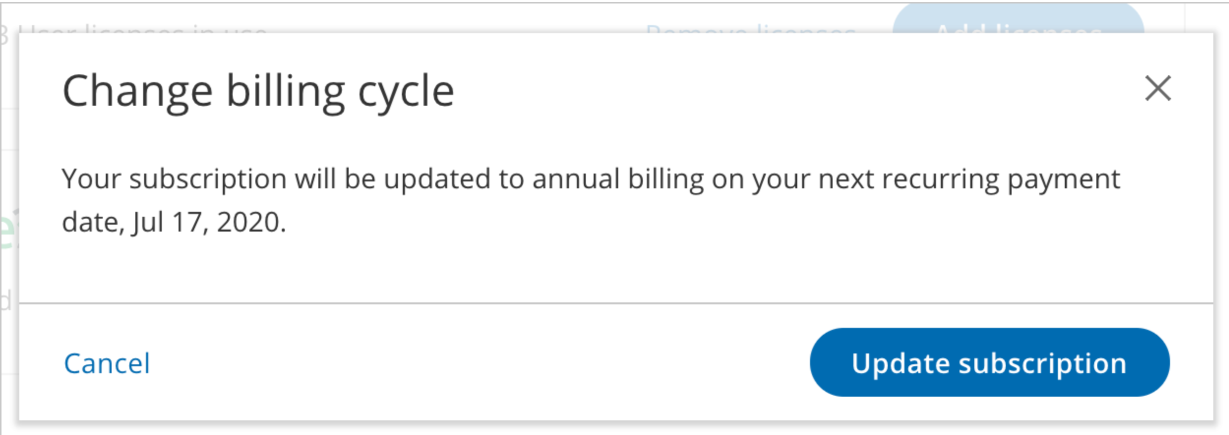


Figure 1: Change billing cycle popup - This example changes the cycle from monthly to annual

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).

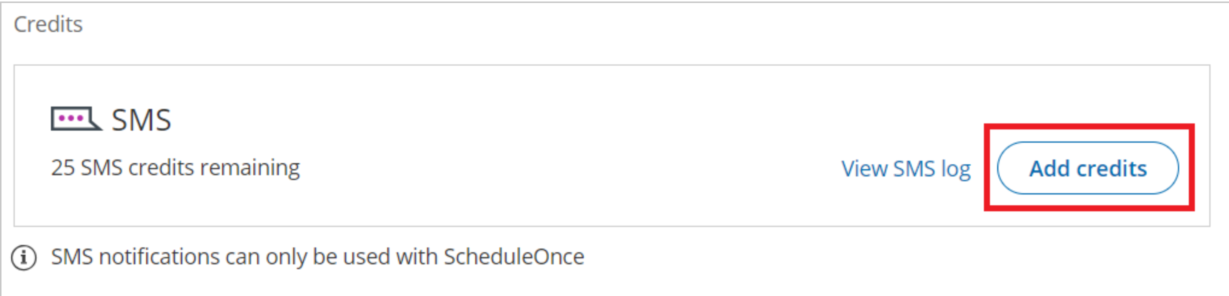


Figure 1: Add SMS credits

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).

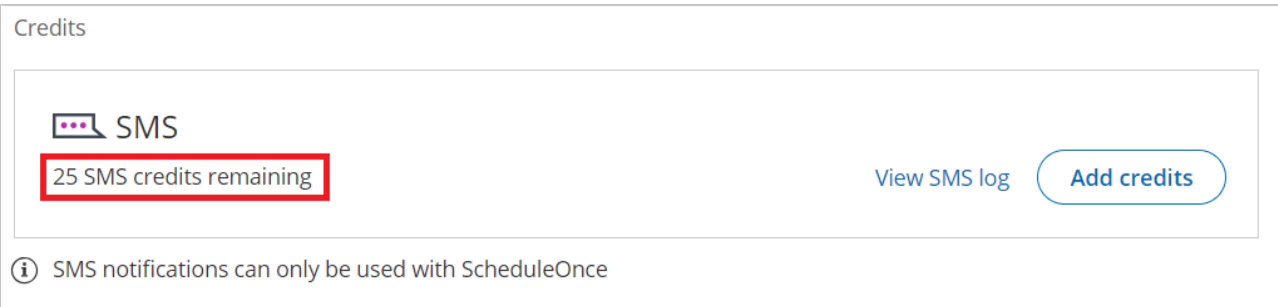


Figure 2: SMS credits remaining

- 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).

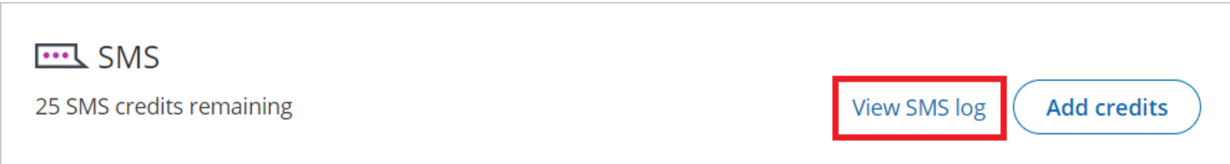


Figure 1: View SMS log

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 [Classic]

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**.

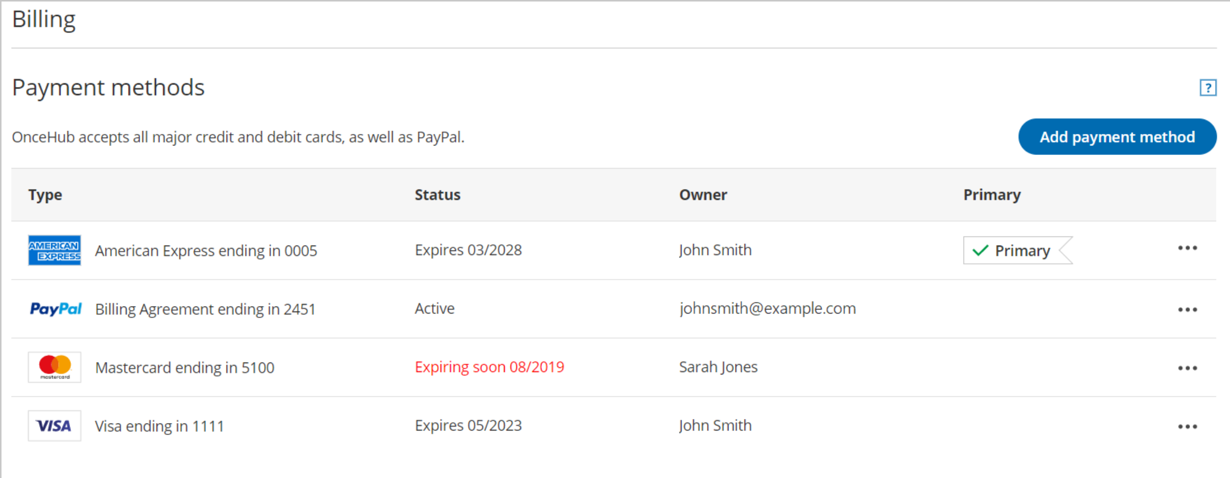


Figure 1: Payment methods section

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).

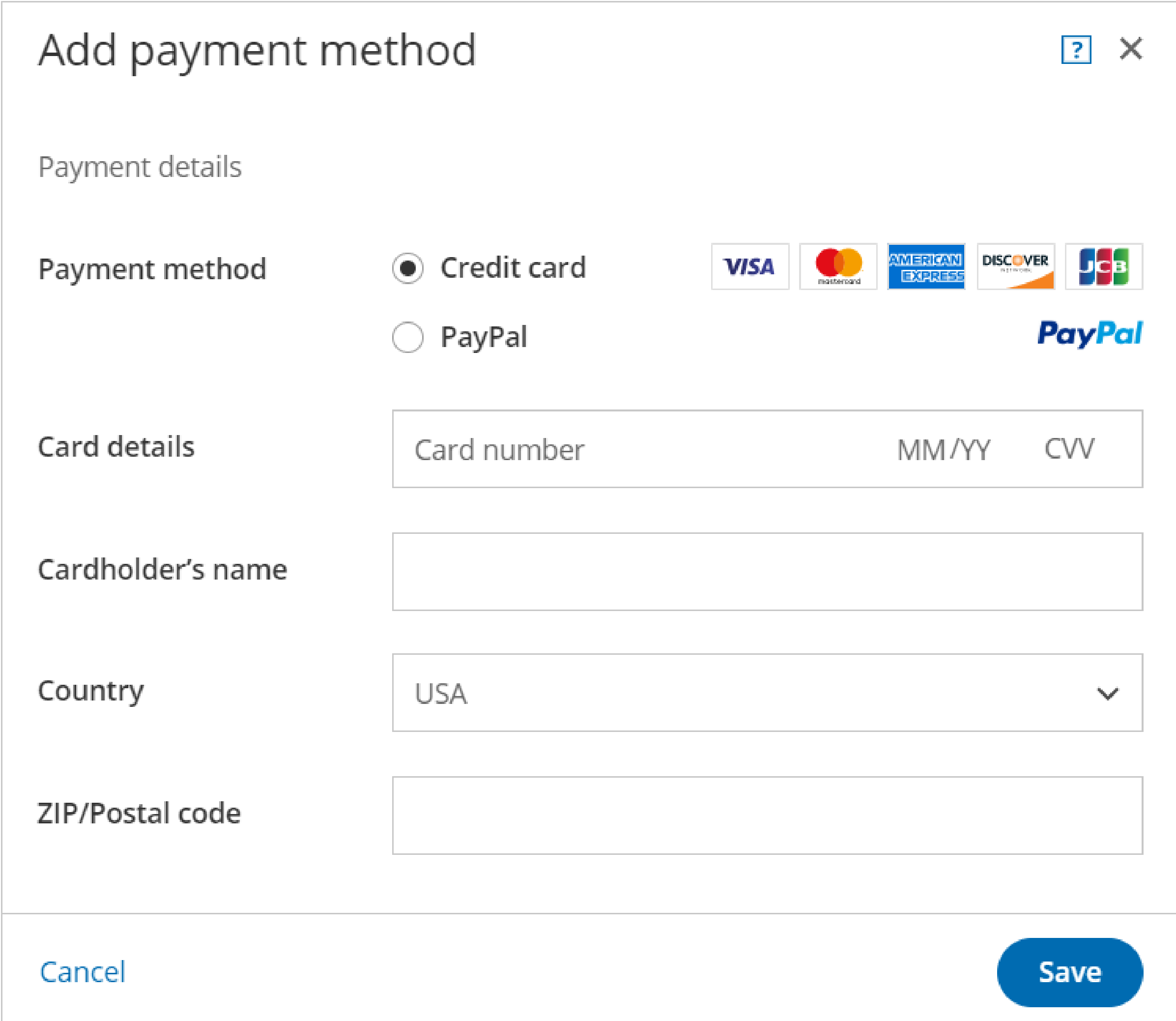


Figure 2: Selecting credit card as the payment method

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).

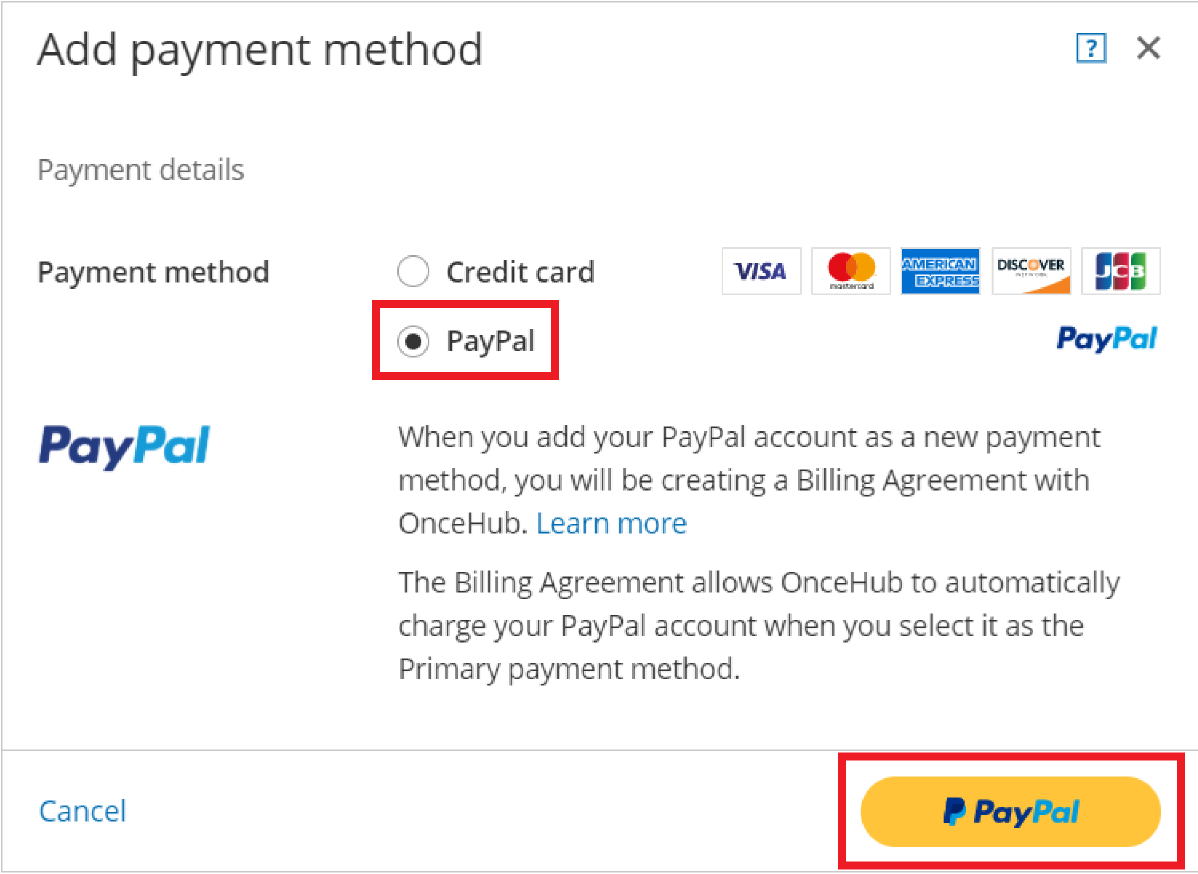


Figure 3: Selecting PayPal as the payment method

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.

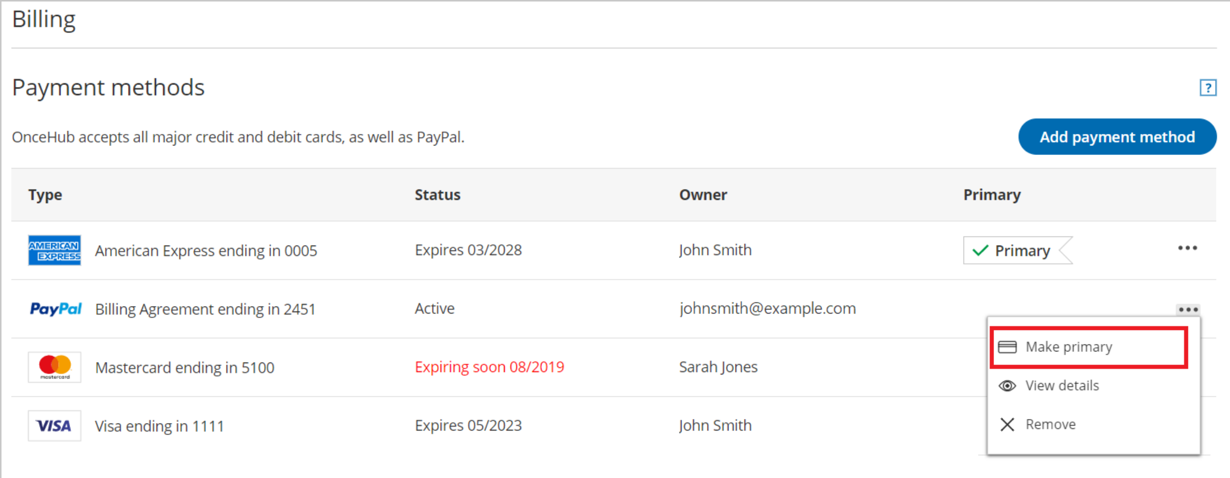


Figure 4: Payment methods action menu

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.

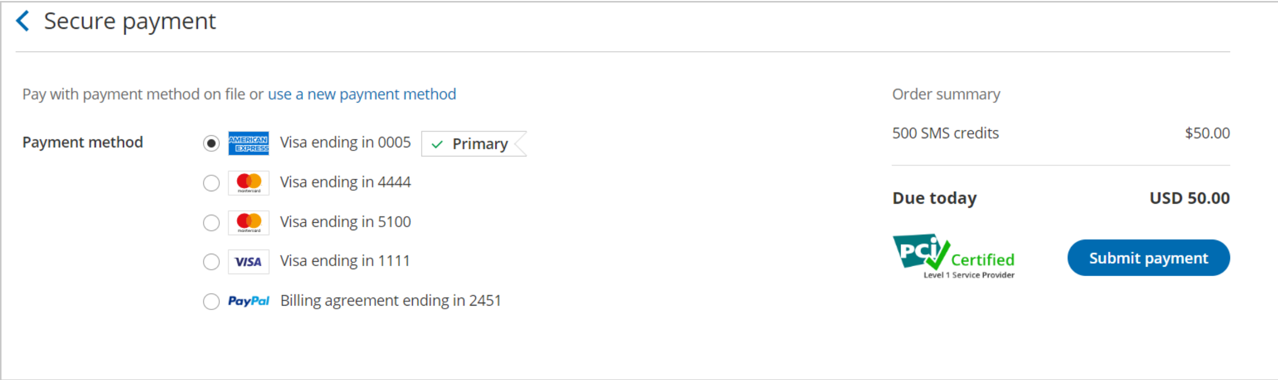


Figure 5: Selecting a payment method when making a one-off purchase

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.

Sending Scheduling Notifications from a Corporate Office 365 Account

Use the **Corporate Email** feature to send OnceHub notifications from your company's corporate Office 365 account instead of the default mailer@oncehub.com. This brands your email communications, providing a more professional experience for your guests and users.

Note: Depending on your plan type, you may need to purchase the **Security and Compliance Add-On** to make use of this feature.

Impact of Enabling the Corporate Email Feature for Your Account

Once connected, all scheduling notifications sent to Guests and Hosts will originate from the designated corporate email account.

Only an Administrator or the Account Owner is authorized to configure this feature. Once configured, it will apply to all Users within the account.

Note: Microsoft is discontinuing the basic authentication protocol necessary for Corporate Email functionality with Office 365. Should connection via SMTP prove unsuccessful, it is recommended that each user utilize the alternative option detailed at the conclusion of this article.

How to Set Up Corporate Email

Follow these steps to connect your corporate email account to OnceHub:

Configuring Your Mail Server Settings

- If you use an internally-hosted mail server, you must grant access to OnceHub by allowing the server IP addresses in this **article**.
- If your organization uses Microsoft Exchange, ensure relaying is enabled for the IP addresses listed in this **article**.

Accessing the Corporate Email Settings

1. Click the gear icon in the top-right corner.
2. Select **Security (and Compliance)** from the dropdown menu.
3. Click on **Corporate Email** in the left-hand menu.
4. Click **Connect** to begin setup.

Providing Email Account Credentials

Once you click **Connect**, you'll be prompted to enter your account credentials as follows:

- **I am using:** Select **Office 365** from the dropdown list.
- **Sending Email Address:** Specify the email address that will be used to send notifications.
- **Password:** Enter your Office 365 account password.

- **Sending Email Name Label:** Enter the name label that will appear on emails sent to recipients.
- **SMTP Server:** Provide the URL of your SMTP server (e.g., smtp.office365.com).
- **Port:** Specify the SMTP server port number (e.g., 587 for secure connections).

Finalizing the Setup

After entering all required credentials:

- Double-check your configuration settings for accuracy.
- Click **Connect** to complete the setup.

Alternative: Email From Meeting Host Mailbox

Alternatively, hosts can configure OnceHub to send email notifications from their personal mailboxes. This setting is managed individually for each host. For instructions on how to set this up, please refer to our **Connect OnceHub to Your Microsoft Office 365 article**.

Sending Scheduling Notifications from a Corporate Amazon SES Account

Use the **Corporate Email** feature to send OnceHub notifications from your company's corporate Amazon SES account instead of the default mailer@oncehub.com. This brands your email communications, providing a more professional experience for your guests and users.

Note: Depending on your plan type, you may need to purchase the **Security and Compliance Add-On** to make use of this feature.

Impact of Enabling the Corporate Email Feature for Your Account

Once connected, all scheduling notifications sent to Guests and Hosts will originate from the designated corporate email account.

Only an Administrator or the Account Owner is authorized to configure this feature. Once configured, it will apply to all Users within the account.

How to Set Up Corporate Email

Follow these steps to connect your corporate email account to OnceHub:

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1. Click the gear icon in the top-right corner.
2. Select **Security (and Compliance)** from the dropdown menu.
3. Click on **Corporate Email** in the left-hand menu.
4. Click **Connect** to begin setup.

Providing Email Account Credentials

Once you click **Connect**, you'll be prompted to enter your account credentials as follows:

- **I am using:** Select **Amazon SES** from the dropdown list.
- **Sending Email Address:** Specify the email address that will be used to send notifications.
- **User name:** Enter your Amazon Simple Email Service (SES) SMTP username.
- **Password:** Enter your SMTP password.
- **Sending Email Name Label:** Enter the name label that will appear on emails sent to recipients.
- **SMTP Server:** Provide the URL of your SMTP server (e.g., email-smtp.us-east-1.amazonaws.com).
- **Port:** Specify the SMTP server port number (e.g., 587 for secure connections).

Finalizing the Setup

After entering all required credentials:

- Double-check your configuration settings for accuracy.

- Click **Connect** to complete the setup.

Sending Scheduling Notifications from a Custom Corporate SMTP Server

Use the **Corporate Email** feature to send OnceHub notifications from your company's Custom SMTP server's mailbox instead of the default mailer@oncehub.com. This brands your email communications, providing a more professional experience for your guests and users.

Note: Depending on your plan type, you may need to purchase the **Security and Compliance Add-On** to make use of this feature.

Impact of Enabling the Corporate Email Feature for Your Account

Once connected, all scheduling notifications sent to Guests and Hosts will originate from the designated corporate email account.

Only an Administrator or the Account Owner is authorized to configure this feature. Once configured, it will apply to all Users within the account.

How to Set Up Corporate Email

Follow these steps to connect your corporate email account to OnceHub:

Configuring Your Mail Server Settings

- If you use an internally-hosted mail server, you must grant access to OnceHub by allowing the server IP addresses in this **article**.

Accessing the Corporate Email Settings

1. Click the gear icon in the top-right corner.
2. Select **Security (and Compliance)** from the dropdown menu.
3. Click on **Corporate Email** in the left-hand menu.
4. Click **Connect** to begin setup.

Providing Email Account Credentials

Once you click **Connect**, you'll be prompted to enter your account credentials as follows:

- **I am using:** Select **Other** from the dropdown list.
- **Sending Email Address:** Specify the email address that will be used to send notifications.
- **User name:** If your email server requires SMTP credentials, enter your SMTP username. If not, use the same email address as the Sending Email Address.
- **Password:** If your SMTP server requires credentials, provide the SMTP password. If no credentials are needed, enter the password for your email account.
- **Sending Email Name Label:** Enter the name label that will appear on emails sent to recipients.
- **SMTP Server:** Provide the URL of your SMTP server (e.g., smtp.office365.com).

- **Port:** Specify the SMTP server port number (e.g., 587 for secure connections).

Finalizing the Setup

After entering all required credentials:

- Double-check your configuration settings for accuracy.
- Click **Connect** to complete the setup.

IP Addresses to Whitelist for OnceHub Corporate Email Account Feature When Using Internal Mail Servers

If you use an internally-hosted mail server, you must grant access to OnceHub by allowing the following server IP addresses:

- 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

IP Addresses to Enable Relaying For in Microsoft Exchange for the OnceHub Corporate Email Account Feature

If your organization uses Microsoft Exchange, ensure relaying is enabled for these IP addresses:

- 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

Configuring single sign-on (SSO) for your account

Single Sign-On (SSO) allows your users to securely access OnceHub using their existing identity provider (IDP) credentials, simplifying login and enhancing security. This guide outlines the steps to configure SSO (specific instructions for IDPs, like OneLogin, Azure, Okta, and G Suite) and how to manage and utilize SSO effectively.

What is SSO and Why Use It?

Single Sign-On (SSO) enables users to log in to OnceHub without creating a new password. Instead, authentication is handled by your identity provider (IDP), such as OneLogin, Azure AD, G Suite, or Okta.

Benefits of Using SSO:

- **Simplified User Experience:** Users can access OnceHub using their IDP credentials without needing separate login details.
- **Enhanced Security:** Centralized authentication reduces the likelihood of password-related vulnerabilities.
- **Streamlined User Management:** Administrators control access and permissions through the IDP.

Prerequisites for SSO Configuration

Before configuring SSO, ensure you meet the following requirements:

- **OnceHub Account:** You must be an administrator in your OnceHub account.
- **Security and Compliance Add-On:** Your account must have the **Security and Compliance Add-On** activated.
- **Identity Provider (IDP):** Have an active account with an IDP (e.g., OneLogin, Azure AD, Okta, or G Suite).
- **Matching Email Addresses:** User email addresses in your IDP must match their OnceHub user profiles. If they don't match, users will be unable to log in.

General SSO Setup Process

Regardless of the identity provider, the general SSO configuration process in OnceHub involves these steps:

1. **Request Access to SSO:**
    - SSO is available for organizations with the Security and Compliance Add-On. Contact OnceHub support to enable SSO for your account.
2. **Navigate to SAML Configuration:**
    - Click on the gear icon in the top-right, then Security and Compliance.
3. **Obtain Required Fields from Your IDP:**
    - You will need the following from your IDP:
        - Entity ID (or Identifier)
        - Single Sign-On URL (Login URL)

- Public x509 Certificate

- These fields may have different names depending on your IDP.

4. **Enter IDP Details in OnceHub:**

- Copy the required fields from your IDP and paste them into OnceHub's SAML configuration fields.

5. **Verify and Test Connection:**

- Click Verify in OnceHub to confirm the SAML configuration works correctly.
- Ensure that the test user can log in successfully using SSO.

6. **Enable SSO for All Users:**

- Once the configuration is verified, toggle the Enable SSO for All Users option. This requires all users to log in using SSO.

Provider-Specific Configuration Steps

Configuring SSO with OneLogin

1. In OneLogin:

   - Go to Administration → Applications .
   - Search for SAML Test Connector (Advanced) and start setup.
   - Configure key fields:
     - Entity ID : Add the OnceHub-provided Entity ID.
     - SAML SSO URL : Copy OnceHub's login URL into the connector.

2. Generate x509 Certificate:

   - Click Certificate Settings in OneLogin and download the x509 certificate.

3. In OnceHub:

   - Enter the Entity ID, SSO URL, and public x509 certificate in Account Settings → Security → SSO .

4. Verify and enable the integration as described above.

Configuring SSO with G Suite

- In G Suite Admin Console:
  - Go to Apps → SAML Apps → Add App .
  - Add custom app settings:
    - SSO URL : Copy OnceHub's SAML login URL.
    - Entity ID : Input the unique OnceHub identifier.

    - Download the x509 certificate provided by G Suite.
- In OnceHub:
    - Paste the SSO URL, Entity ID, and x509 certificate into the SAML configuration settings.
    - Test the connection and verify functionality.

Configuring SSO with Okta

- In Okta:
    - Go to Applications → Add Application .
    - Search for SAML-based Application and select it.
    - Add app details, including:
        - Entity ID and Login Redirect URL (provided by OnceHub).
    - Ensure attributes such as email are mapped correctly.
- Download Certificate:
    - Generate and download the x509 certificate from Okta.
- In OnceHub:
    - Input the required fields (x509 certificate, Entity ID, SSO URL).
    - Test and enable the integration.

Configuring SSO with Azure AD

- In Azure Portal:
    - Go to Enterprise Applications and create a new application for OnceHub.
    - Add SAML configuration:
        - Identifier (Entity ID) : Use OnceHub's Entity ID.
        - Reply URL : Add the OnceHub Login Redirect URL.
- Download Certificate:
    - Download the x509 certificate and ensure claims are set to include email.
- In OnceHub:
    - Enter the details for Entity ID, SSO URL, and x509 certificate.
    - Test the integration before enabling SSO for all users.

Using SSO in Your Organization

Once SSO is configured, users in your organization can log in securely using the following steps:

1. Go to the OnceHub login page.
2. Click Sign in with SSO.

Common SSO Management Tasks

Reset or Modify SSO Configuration

If your IDP changes settings like the Entity ID or SSO URL, you must update the modified fields and verify settings in OnceHub to ensure SSO continues to function.

Removing a User or Role in the IDP

- If a user no longer requires OnceHub access, remove them from your IDP or disable their role.
- The changes will reflect in OnceHub, blocking access for the user.

Troubleshooting SSO Login Issues

Common issues include:

- **Email Mismatches:** Ensure the user's email in the IDP matches their email in OnceHub.
- **SSO Certificate Expiry:** Renew the x509 certificate in your IDP and update it in OnceHub.
- **Incorrect Mapping:** Recheck attribute mappings (e.g., email) to ensure they are set correctly.

Frequently Asked Questions (FAQs)

Can I enable SSO for some users and not others?

No. Once SSO is enabled, it becomes the sole login method for all users in your account.

What happens if a user cannot log in via SSO?

- Ensure their OnceHub email matches their email address in the IDP.
- Check if their role in the IDP allows access to the OnceHub application.

How do I disable SSO?

Toggle off the **Enable SSO for all users** option. This allows users to log in using their OnceHub credentials again.

OnceHub service and support

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.
	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**.

Introduction to Security

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 link security

Booking links are 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.

Storing and protecting your sign-in credentials

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

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.

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 (or Security and Compliance)** → **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.

Account lockout policies

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 (or Security and Compliance)** → **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

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 (or Security and Compliance)** → **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**.

Security settings

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.

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.

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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:

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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.

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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 actions. 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.

Security best practices

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.
- 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 links, settings, and meetings that are relevant to them. Where possible, restrict access to Booking links to prevent editing settings that do not require changes

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.

OnceHub cookies

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.

Data protection officer and EU representative

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 (Or Security and Compliance)**.

2. Fill in the information regarding your DPO and EU representative.

You're all set! This information can be edited at any time.

GDPR Compliance

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.

The GDPR's privacy principles

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.

Establishing a lawful basis for processing under the GDPR

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 links 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 link 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

Maintaining records of processing under the GDPR

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 (or Security and Compliance)**.
2. Scroll down and fill out the section **Your use of personal data**.

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.

Collecting consent for processing under the GDPR [Classic]

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).

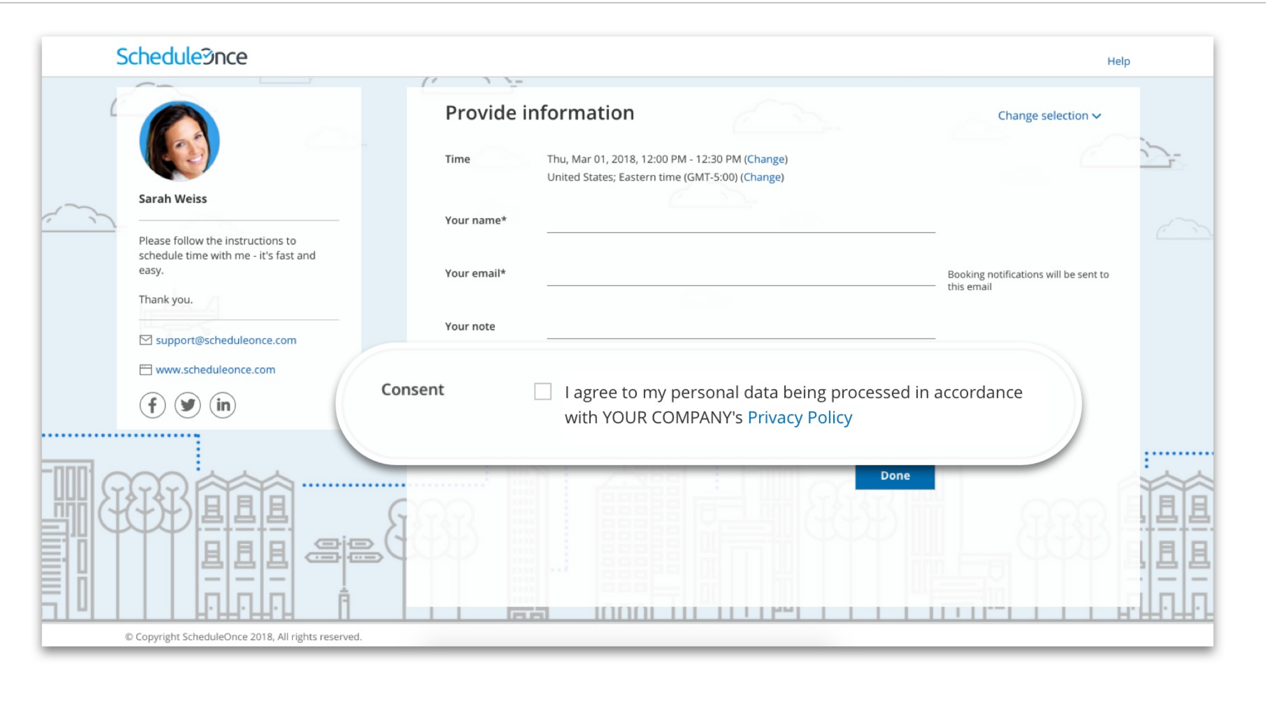


Figure 1: Consent requested in the Booking form

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).

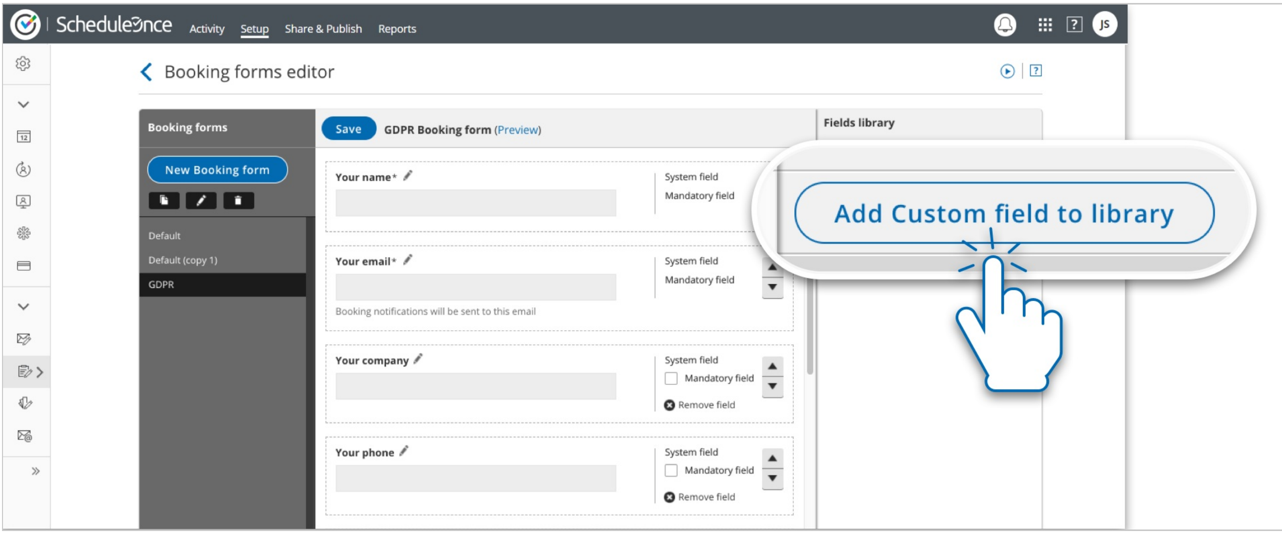


Figure 2: The Booking forms editor

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).

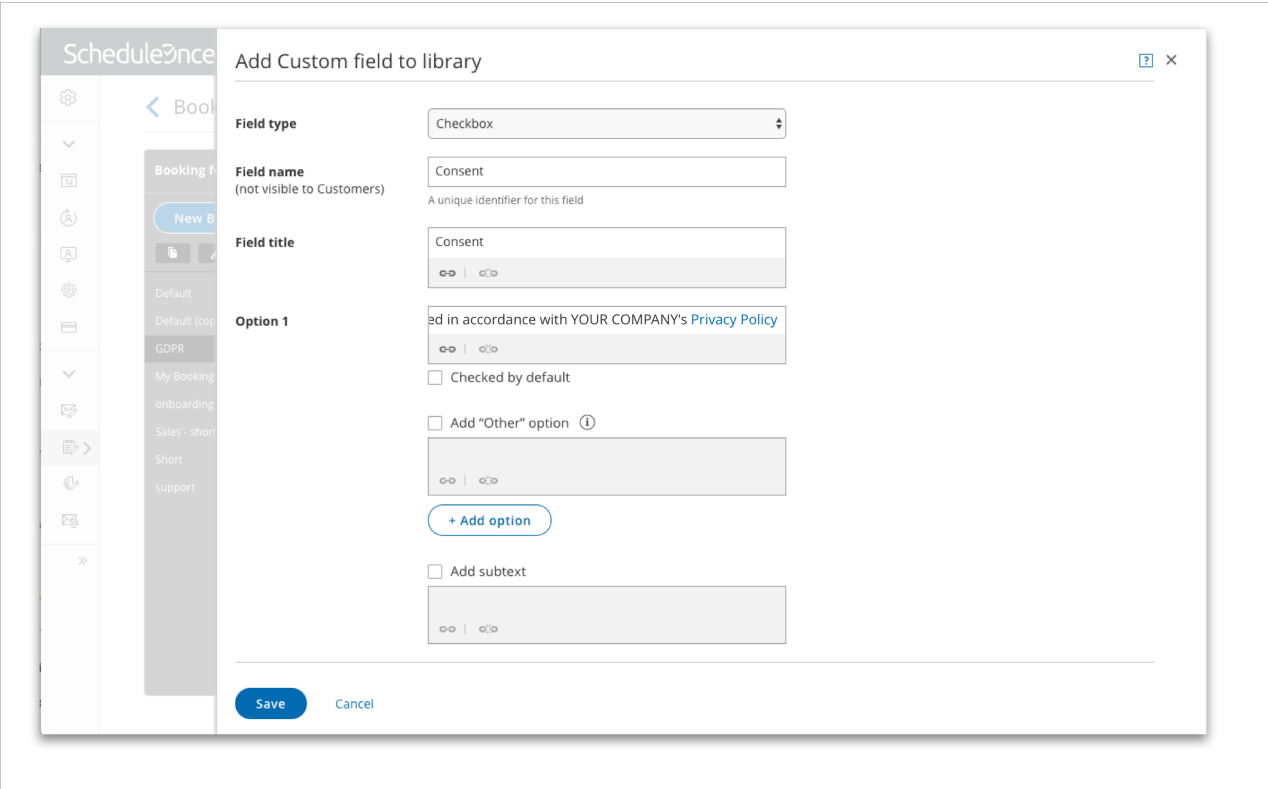


Figure 3: Add Custom field to library

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).

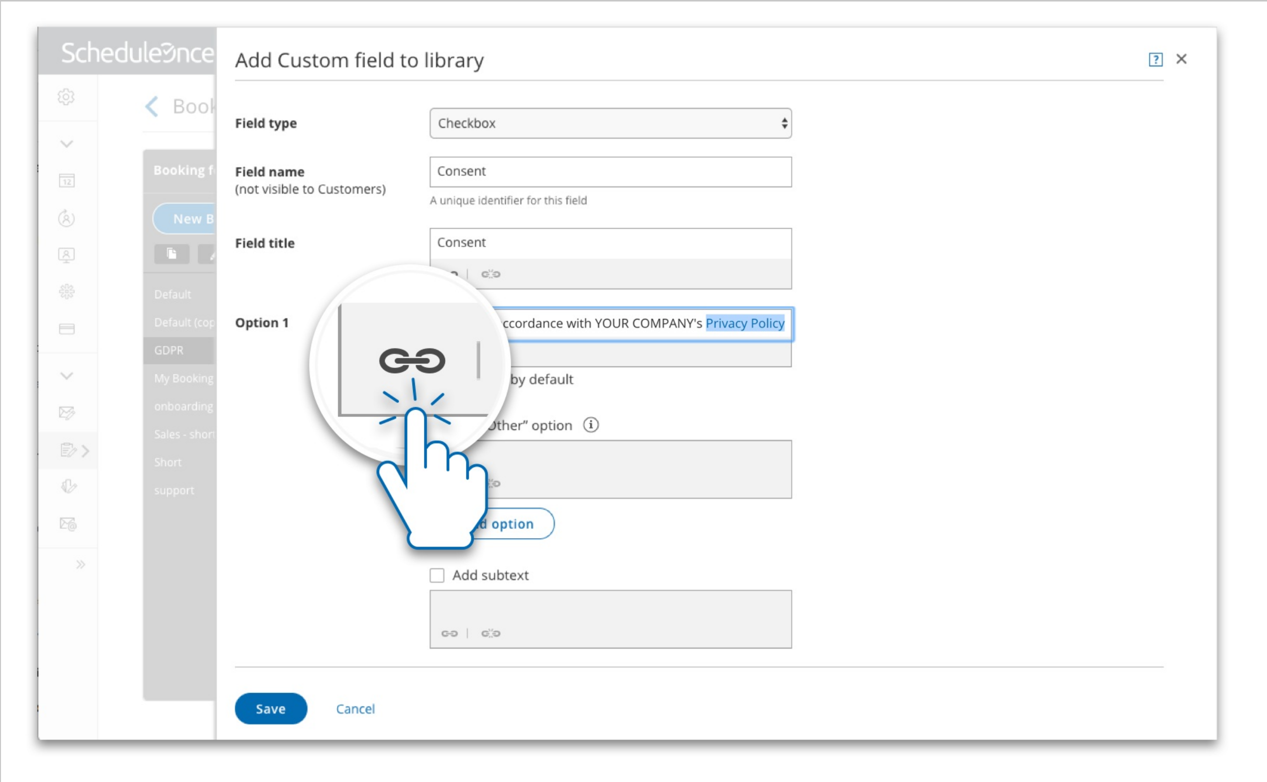


Figure 4: Link to your company's privacy policy

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).

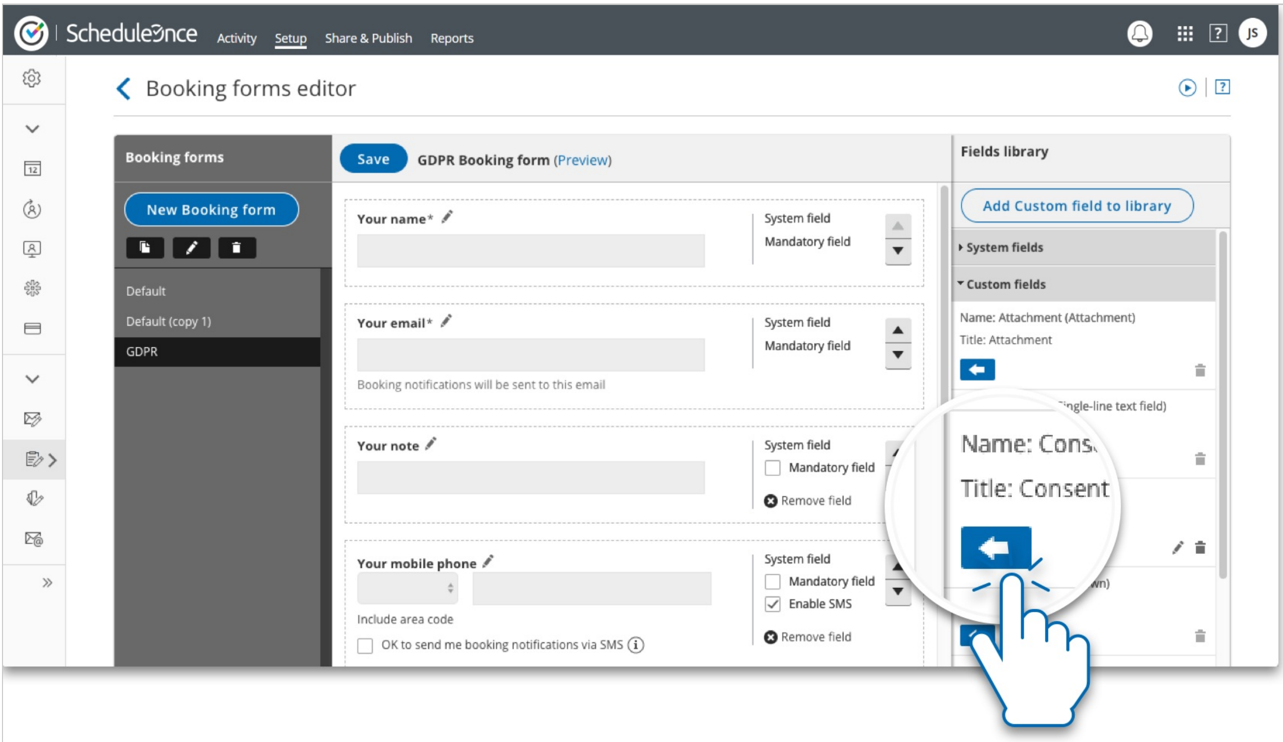


Figure 5: Add the field to the booking form

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).

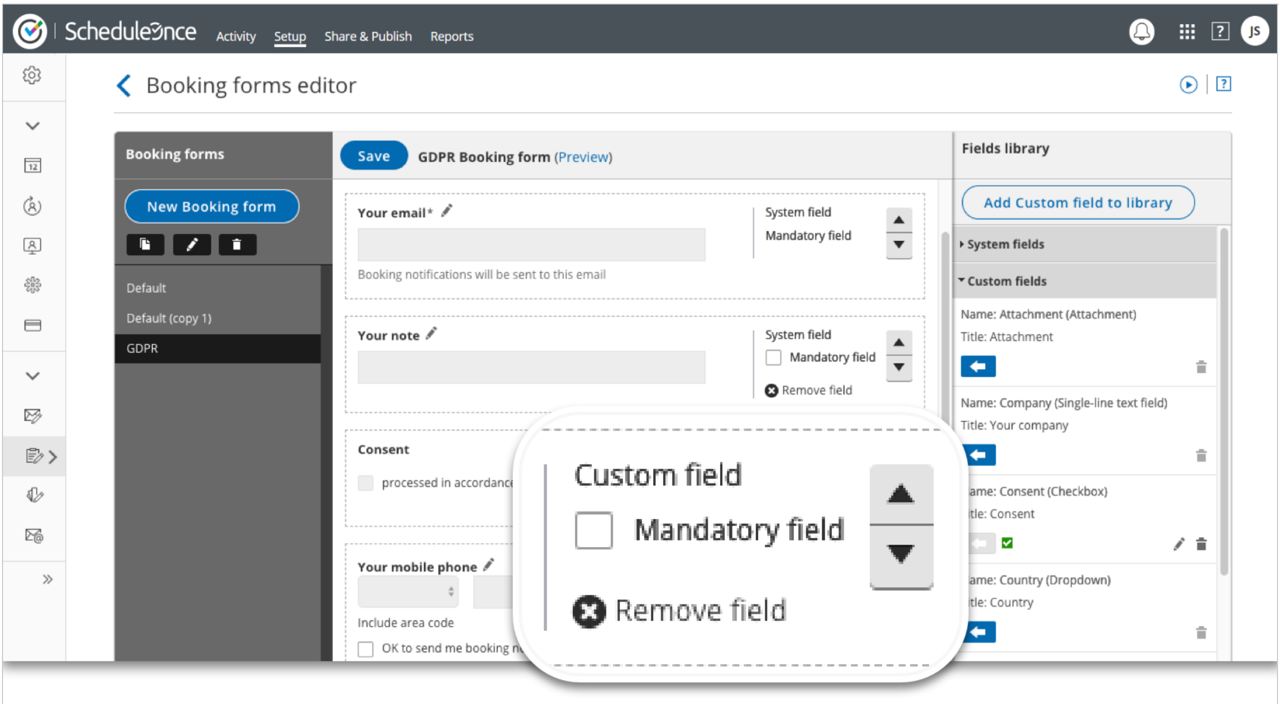


Figure 6: Determine the position and whether the field is mandatory

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

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. 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. 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

Data subject rights under the GDPR [Classic]

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).

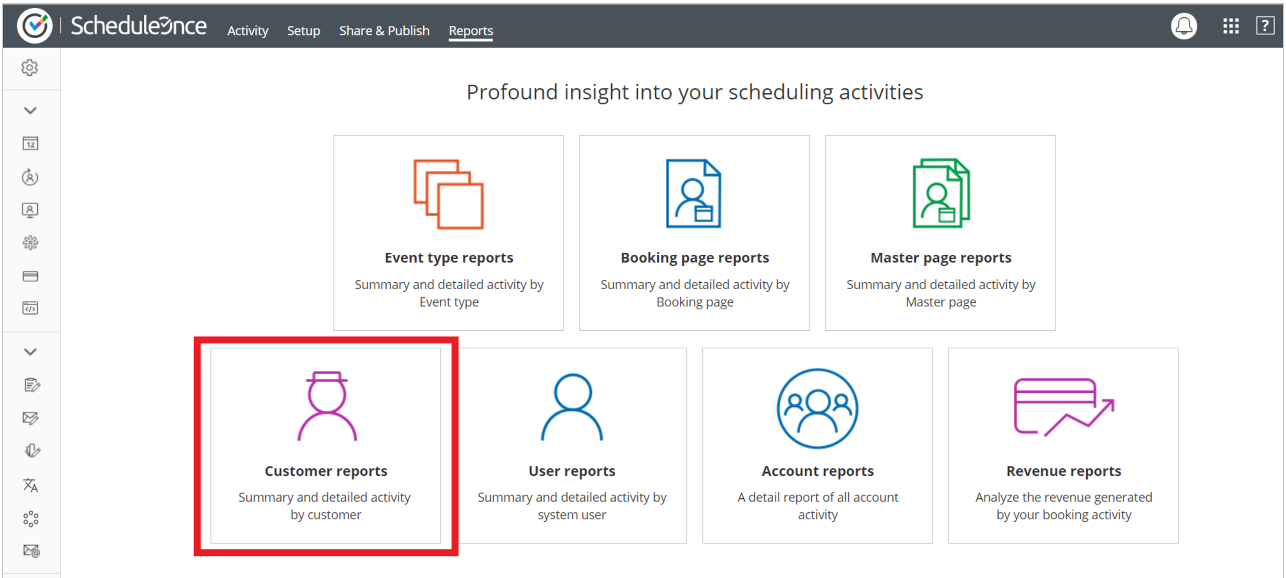


Figure 1: Customer reports

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).

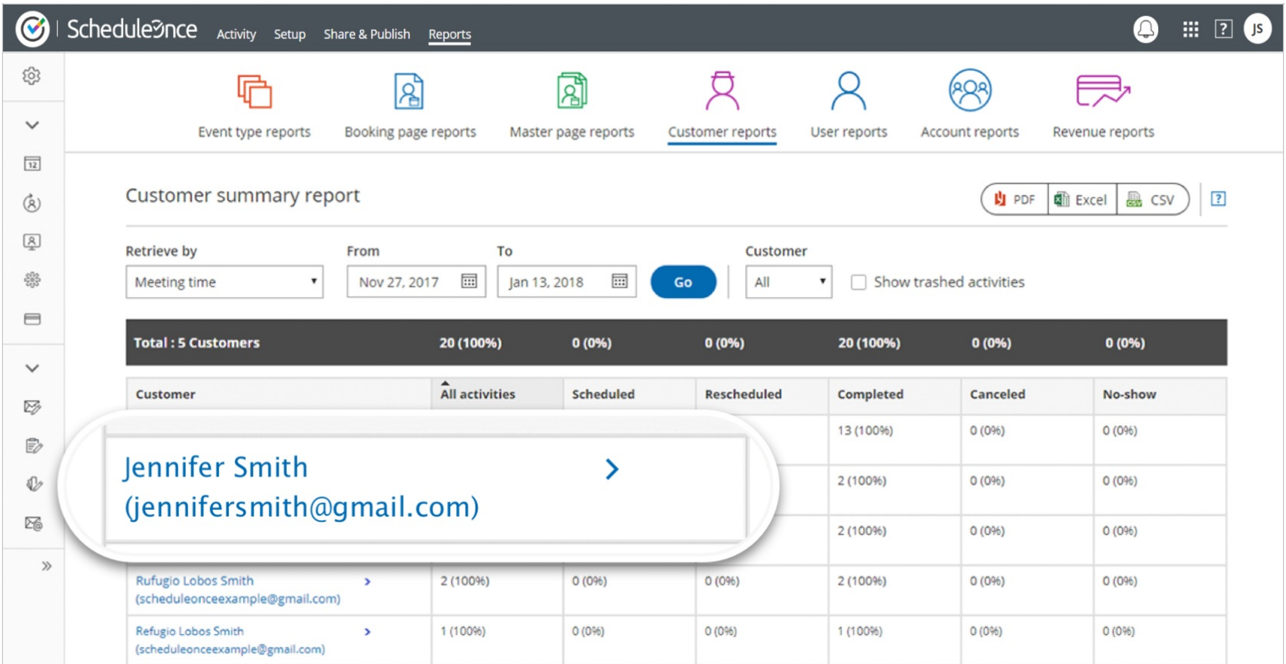


Figure 2: Customer summary report

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).

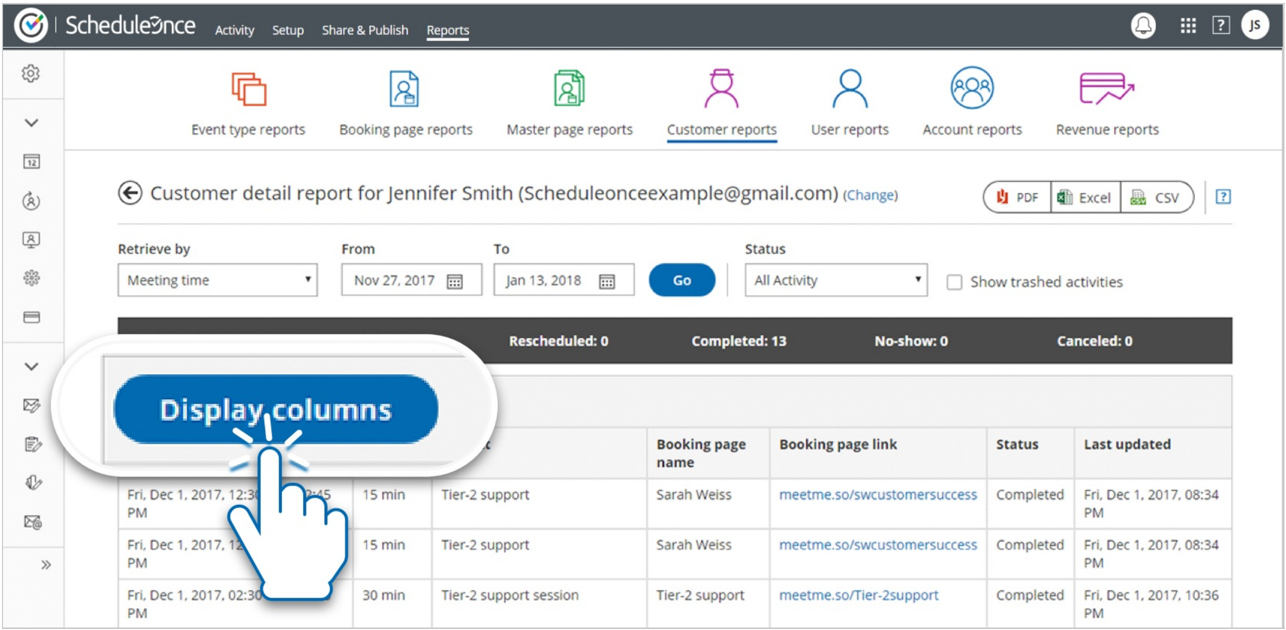


Figure 3: Customer detail report

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).

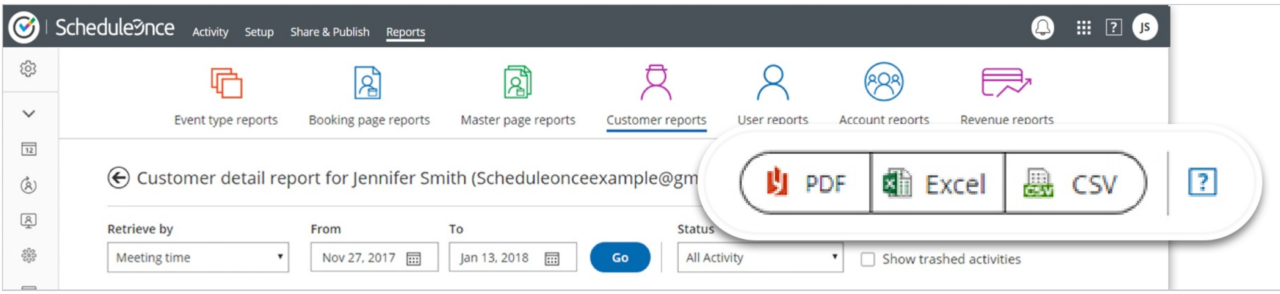


Figure 4: Export the report

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

GDPR data deletion request

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?

If you are using Booking Pages [Classic]

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.

GDPR Terminology

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 links 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.

FAQs about the GDPR

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

Compliance at OnceHub

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

The OnceHub BAA

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.

What is HIPAA?

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

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.

Booking analytics

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 links, 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:

1. Click on **Save as** next to the applied filters.
2. Enter a **View Name**.
3. Click on **Save**.

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.

Lead acquisition [Classic]

Your Lead acquisition 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** or **Routing 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.

You don't need to do anything special to get started with your analytics. Just use **Booking Pages**, **Chatbots** or **Routing 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.)

For example:

- Your **Booking Pages**, **Chatbots** or **Routing 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.

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

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 **Routing 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.

- A high lead capture rate indicates that you have good quality visitors coming to your website and that your **Booking Pages**, **Chatbots** or **Routing 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 **Routing Forms**.

Learn more about accelerating your lead capture rate.

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

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.

Filtering by tools

The default view will show data for all OnceHub tools: **Booking Pages**, **Chatbots** or **Routing 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.

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

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

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.

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.

How do my analytics calculate visitors seen?

Your analytics calculate visitors seen as follows:

Booking Pages: The total number of visitors to pages to your standalone pages or embedded calendars.

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.

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 calendar.

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.

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.

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.

Where Are My Guests Booking From

To get the most out of your marketing, it's important to know where your bookings originate.

Using OnceHub's **Booking Analytics** feature combined with **UTM parameters**, you can better understand your booking traffic, identify visitor sources, and make data-driven decisions.

Booking Analytics

The **Booking Analytics** feature, found in the left-hand menu of your OnceHub account, provides detailed insights into your booking traffic and visitor sources. Using filters, you can analyze data and identify trends.

Using UTM Parameters with Booking Analytics

Combine Booking Analytics with UTM parameters for even more powerful tracking.

UTM parameters are tags added to your booking URLs that track the source, medium, and campaign of each visitor. This allows you to pinpoint the exact origin of each booking.

Learn how to add **UTM parameters** to your Booking Calendar.

Benefits of Using UTM Parameters:

- Gain insights into which campaigns and platforms drive the most bookings.
- Evaluate the success of your marketing efforts.
- Make data-driven decisions to optimize your strategies.

Tracking Bookings with External Redirects

You can also track booking sources using external tools. Redirect guests to an external URL after they book, such as a "Thank You" page on your website.

OnceHub automatically adds any captured UTM parameters to this URL, allowing you to use your own analytics tools to track booking sources.

See our **Booking Calendar redirect guide** for more information.

Tracking Bookings with Duplicate Booking Objects

If you have a simple setup using one or two booking links (Booking Calendars or Booking Pages) and prefer not to use UTM parameters for tracking, duplicating booking links can be an effective alternative.

If you are using Booking Calendars [New]

You can duplicate booking calendars to track bookings from specific sources or campaigns.

1. **Duplicate Your Booking Calendar:**

- Navigate to the **Booking Calendars Lobby** using the left-hand menu.
- Find the booking calendar you wish to duplicate, click on the three dots (...), and select **Duplicate**.

2. **Assign Meaningful Names:**

- Name each duplicated calendar based on its purpose or source. For example, “John’s Booking Calendar – Website Visitors” or “Marketing Campaign Calendar” can help you easily identify their origin.

3. **Share Your Booking Calendars:**

- Use **Page Designer** to copy the URL for sharing your calendar as a standalone page.
- Alternatively, use **Embed Designer** to generate the embed code to place on your website.

If you are using Booking Pages [Classic]

You can track individual booking sources by duplicating booking pages.

1. **Duplicate Your Booking Page:**

- Go to the **Booking Page Scheduling Setup** via the left-hand menu.
- Locate the booking page to duplicate, click on the three dots (...), and select **Duplicate**.

2. **Assign Descriptive Names:**

- Assign names to duplicated pages that reflect their tracking purpose. For example, “John’s Booking Page – Email Campaign” or “Website Booking Page” will allow clear tracking.

3. **Share Your Booking Pages:**

- **As a standalone page:** Click on the desired booking page in your account and copy its URL from the **Overview** section.
- **As an embedded page:**
  - Open the **Share & Publish** section from the left-hand menu.
  - Choose your preferred sharing method (e.g., embed code or iframe).
  - Use the **Select a Booking Page** dropdown to select the page to share.
  - Click **Copy Code** to get the embed code.

Once you’ve shared your duplicated Booking objects and have started receiving bookings, you can use Booking Analytics to monitor performance. Navigate to Booking Analytics in your account and filter by the names you assigned to your calendars or pages to see booking insights for each object.

Contacts in OnceHub [Classic]

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**.

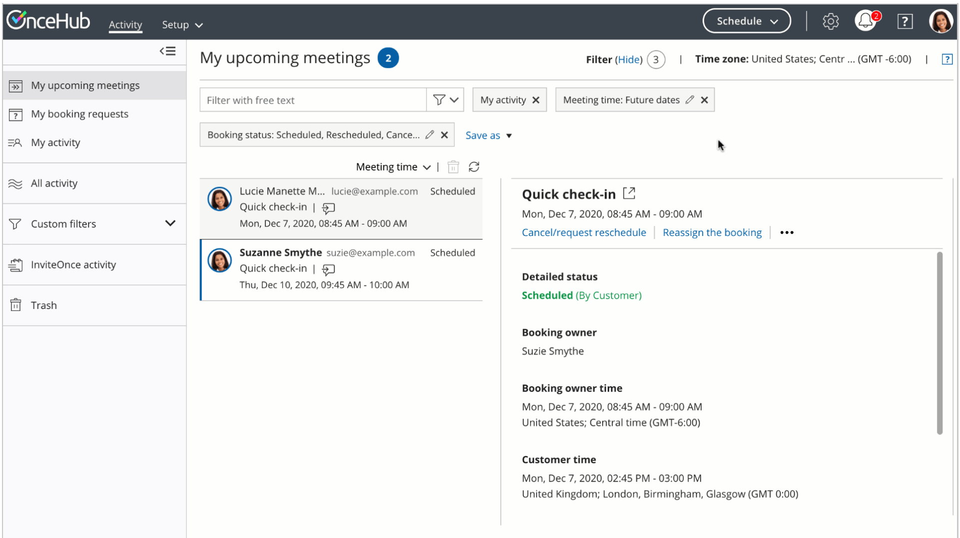


Figure 1: View all activities related to this Customer

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.

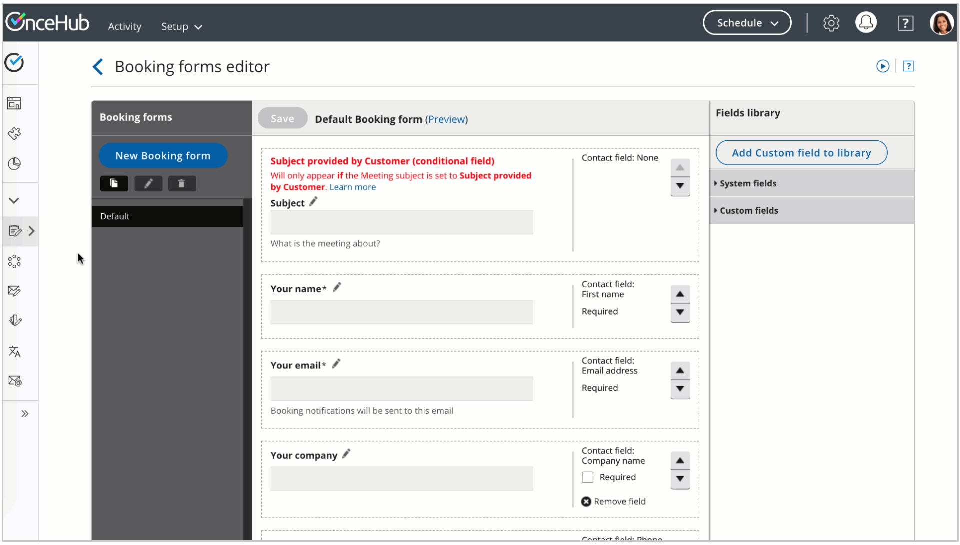


Figure 2: Add new field

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.

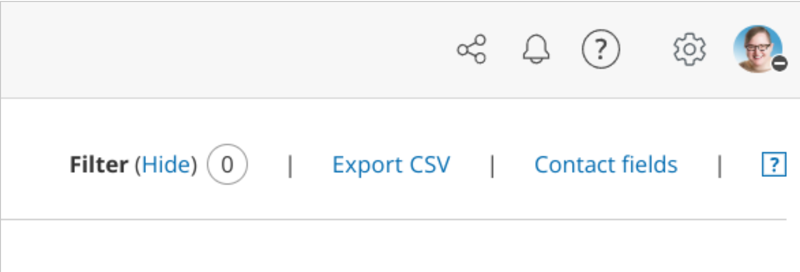


Figure 3: Export CSV

Note:

Only OnceHub administrators can export contacts.

What's New In OnceHub Booking Calendars: Release 31 July 2025

Hidden Fields for Booking Calendars: Capture What Matters, Discreetly!

This feature lets you add fields to your booking forms that are completely hidden from your visitors, yet are fully functional for internal data capture.

When you use a Hidden Field, it silently collects essential internal data such as campaign sources, specific tags, or known customer information without ever being displayed to the end-user. This ensures a clean and focused booking experience for your visitors while providing your team with invaluable context.

This feature works seamlessly with your existing field mapping. You can map these hidden questions to system fields or custom fields, and even set a fallback value in case no other information is provided. For dynamic data capture, Hidden Fields can also receive values passed through URL parameters.

Our approach provides **true hidden field support**, meaning these fields are genuinely invisible and not just pre-filled, setting us apart from some competitors who may only offer pre-fill options.

Why it matters:

The **Hidden Fields** feature empowers you to **strategically capture internal data**, solving a critical challenge many users face. Previously, relying solely on URL parameters to pass internal data posed a risk, as some browsers could strip these parameters, leading to lost tracking information. Hidden Fields eliminate this vulnerability, ensuring your vital data is always securely captured.

This capability is crucial for:

- **Enhanced Campaign Tracking:** Accurately attribute bookings to specific marketing campaigns, allowing for more precise ROI analysis and optimization of your marketing spend.
- **Discreet Data Handling:** Pass internal data without displaying it to guests or relying on URL parameters, ensuring privacy and a streamlined booking experience.

Who can access it:

Plan: Available on all plans.

Access Level: All users can utilize this feature to configure hidden fields on their Booking Calendars.

Permissions: While all users can enable and use hidden fields, only admins have the necessary permissions to create new custom fields that can be mapped to these hidden values for downstream integrations or for passing hidden field values through URL parameters.

For detailed instructions on using Hidden Fields, please take a look at our **Using Hidden Fields to Pass Data to Booking Calendars article**.

We're incredibly excited for you to explore these new enhancements and see how they can streamline your work and improve your users' experience!

Introduction to the PC connector for Outlook

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

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 → **User Integrations**.
3. Click **Connect additional calendars in OnceHub**.
4. Select the **PC connector for Outlook** option.
5. On the **Connect your Outlook Calendar** page, you can download the connector to your Windows PC.
6. 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.

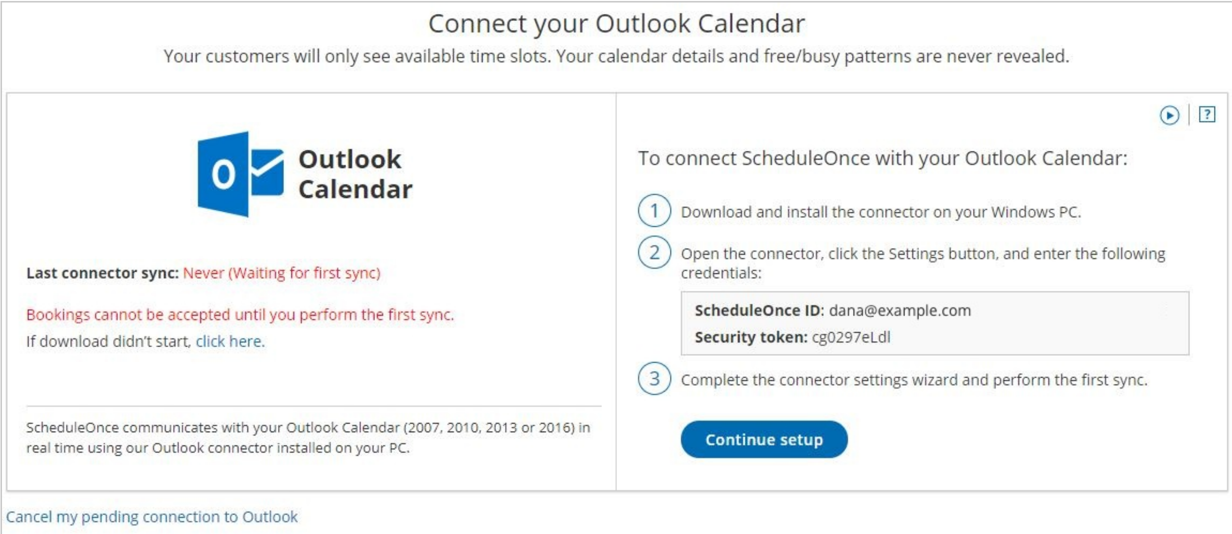


Figure 5: Outlook Calendar integration page - Setup

NoteThe 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

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).

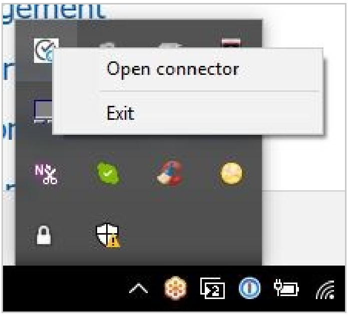


Figure 1: Open connector

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.

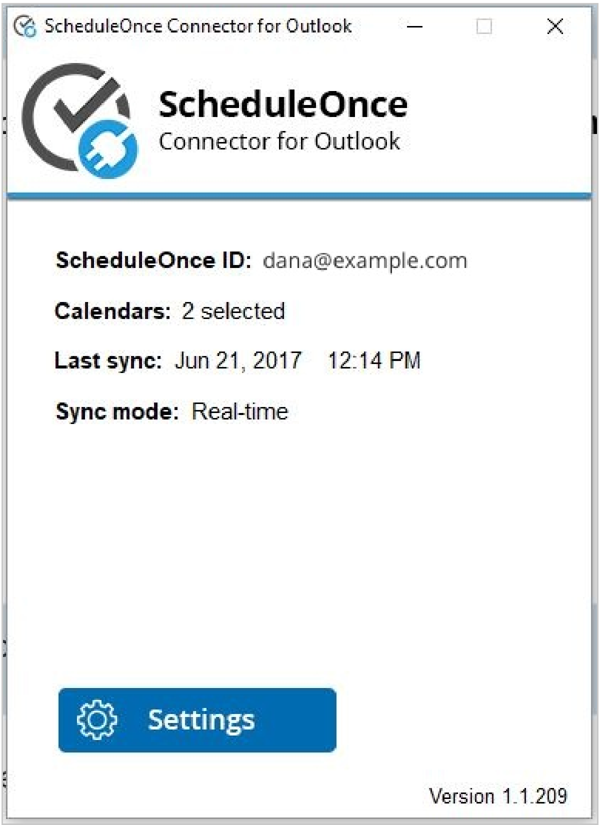


Figure 2: PC Connector for Outlook

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).

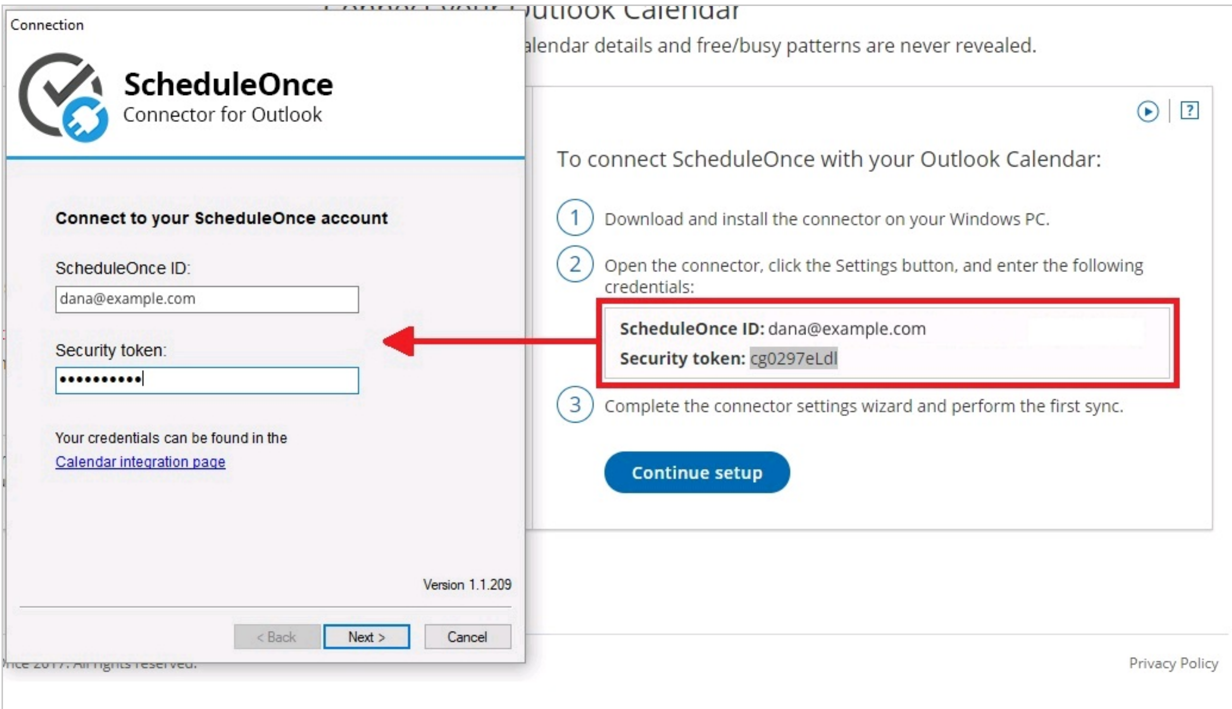


Figure 3: Connect to your OnceHub account

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).

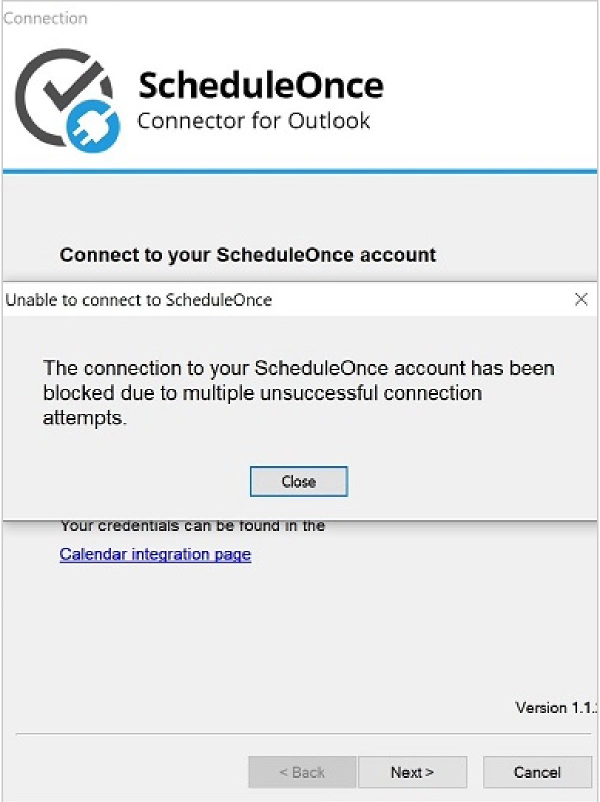


Figure 4: Multiple unsuccessful connection attempts

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.

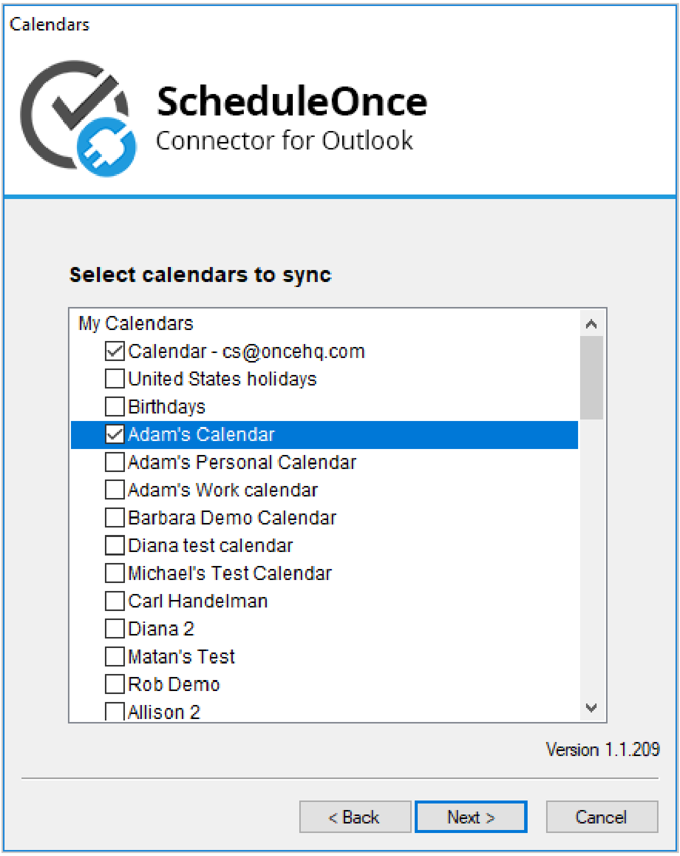


Figure 5: Calendar step

> **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

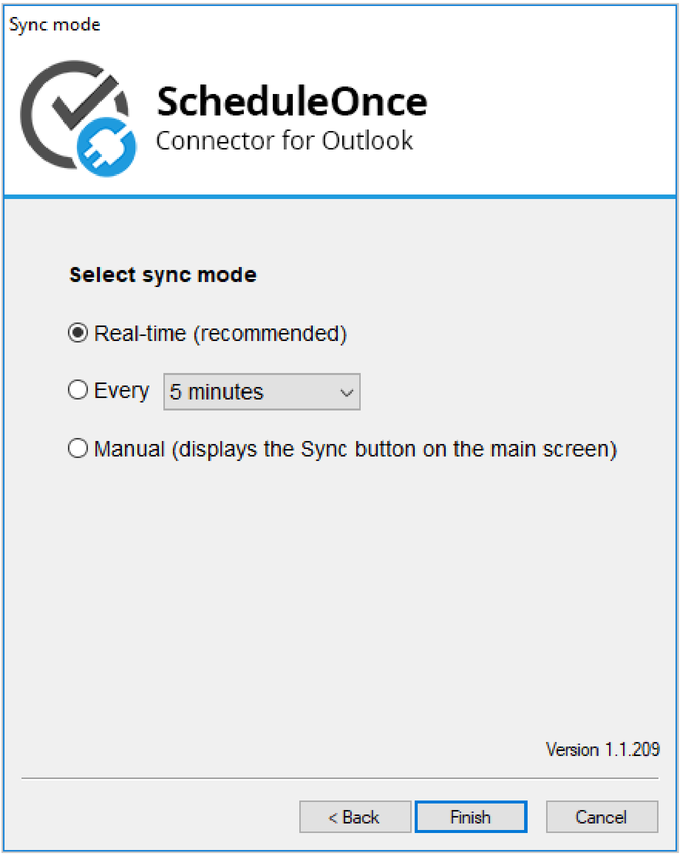


Figure 6: Sync mode

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).

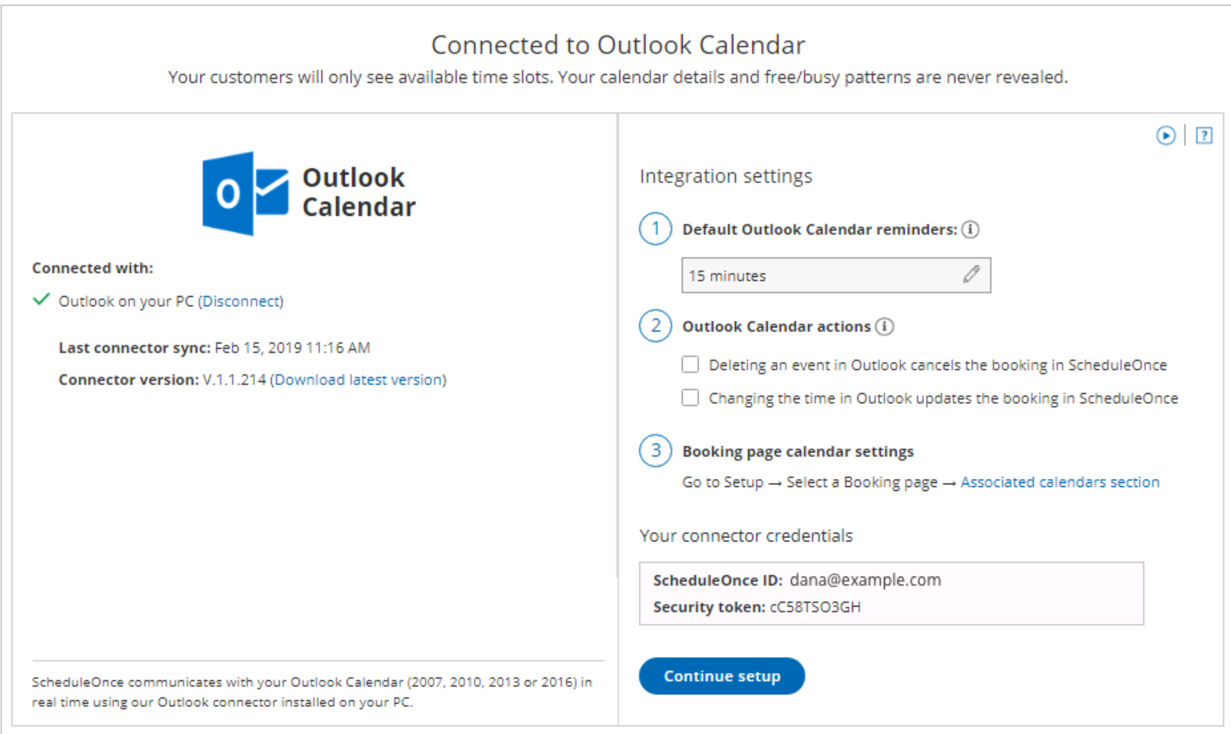


Figure 7: Connected to Outlook Calendar

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).

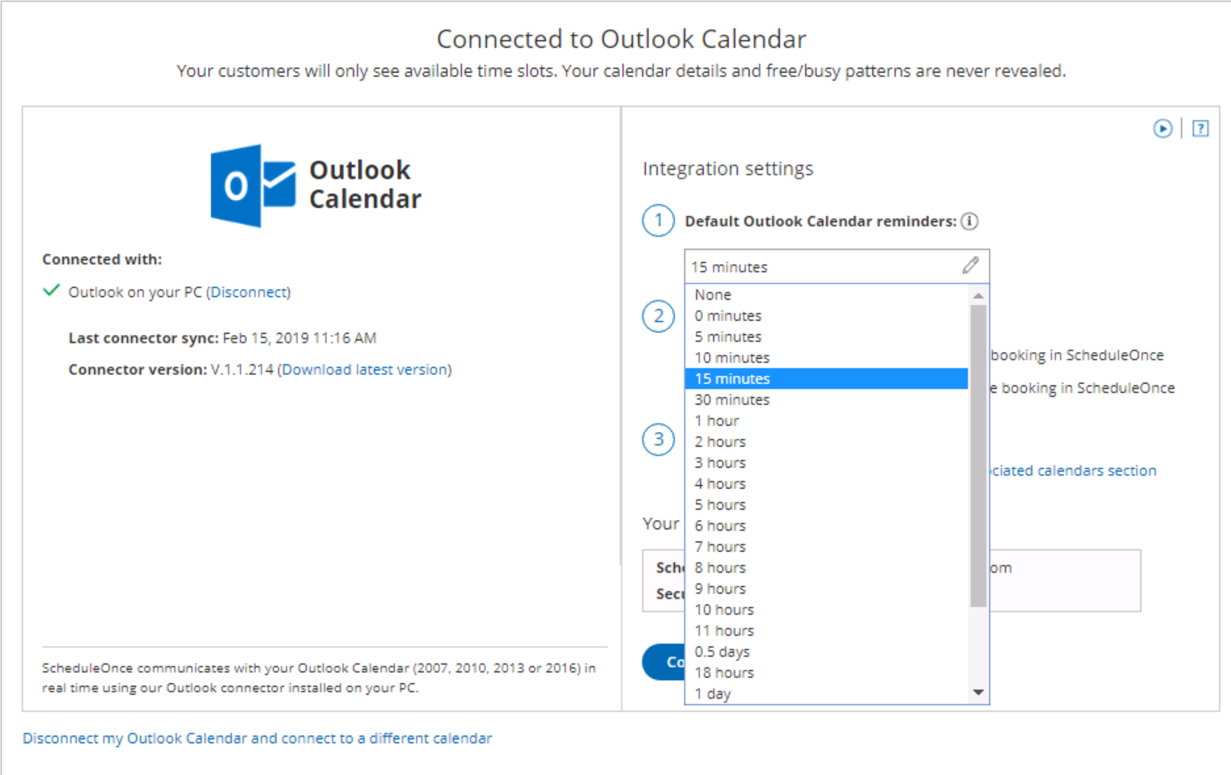


Figure 8: Default Outlook Calendar reminders

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

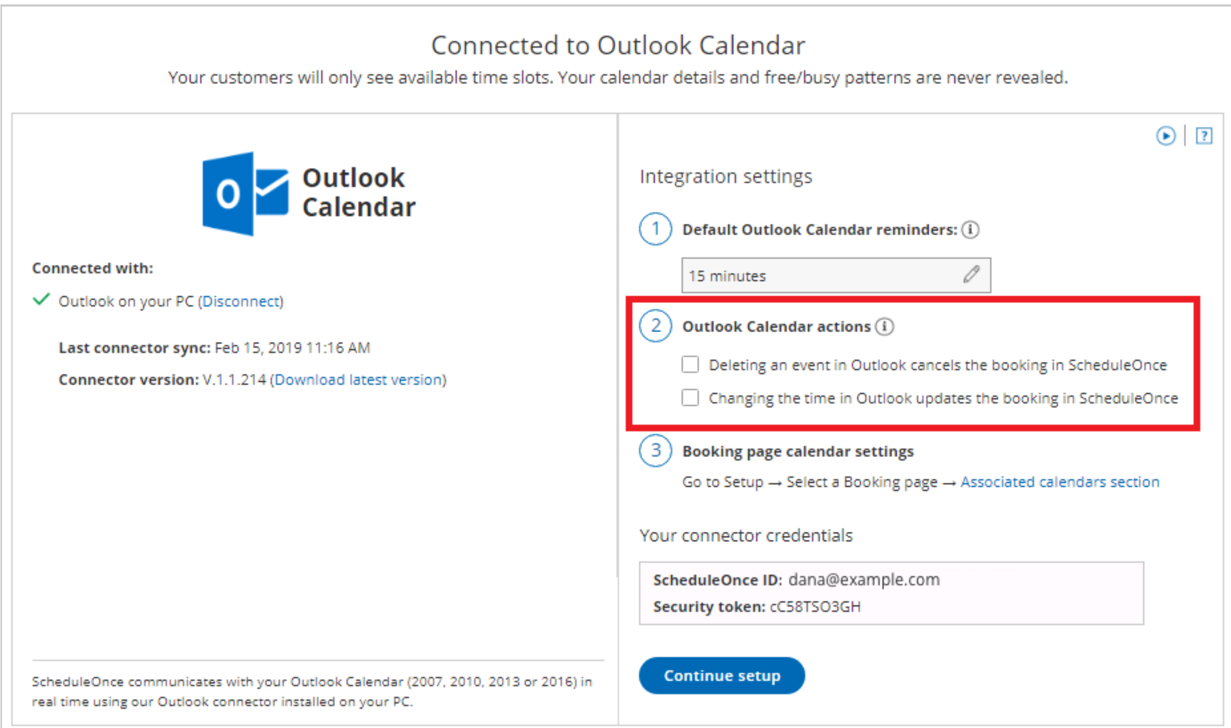


Figure 9: Outlook Calendar actions

Congratulations! Your connector is configured and you can now configure the Associated calendar settings on your Booking pages.

Outlook connector FAQs

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.

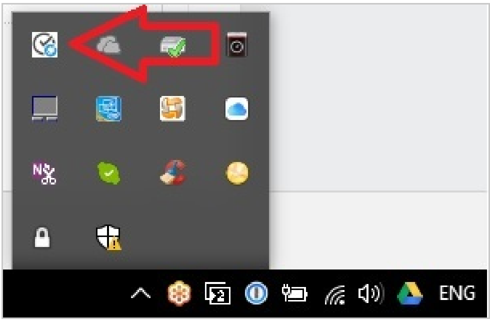
If you do want to connect to one of these calendars, you can ask the calendar owner to grant you full read/write permissions to this calendar. After performing an initial sync, the Associated calendars section on your OnceHub Booking page(s) will list the shared calendars that you have selected for syncing.

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

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:

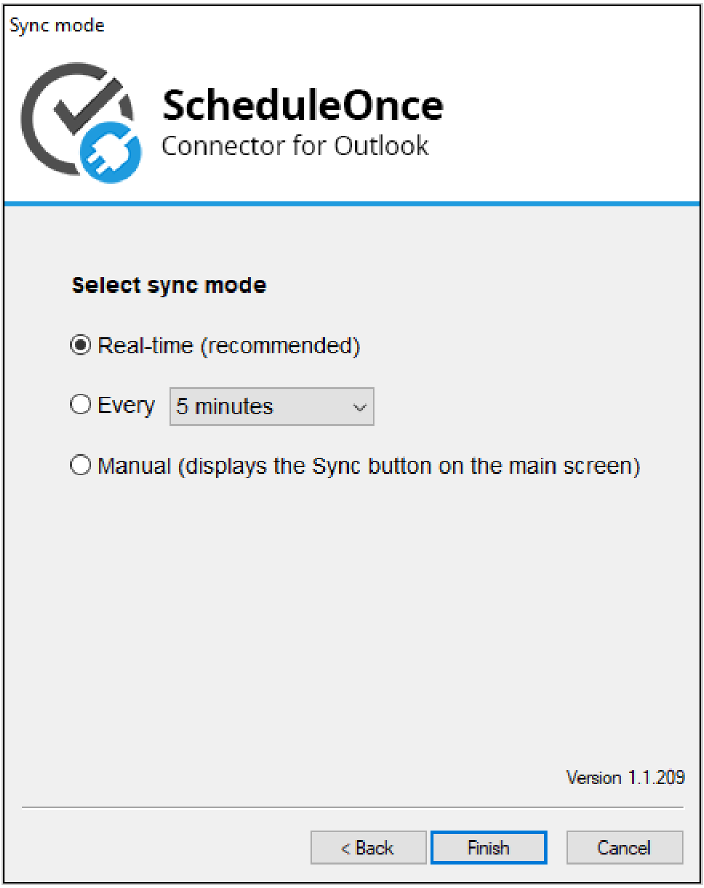


Figure 1: Sync mode options

- **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

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?

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

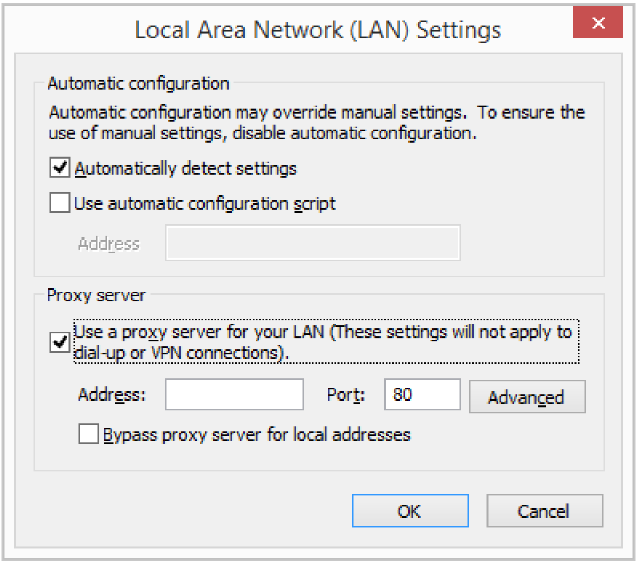
In the above cases, the PC on which the connector is running should not be turned off.

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

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 <u>must</u> 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

Outlook connector is not syncing

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).

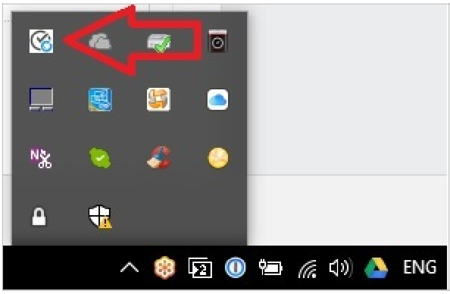


Figure 1: OnceHub Connector for Outlook

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.

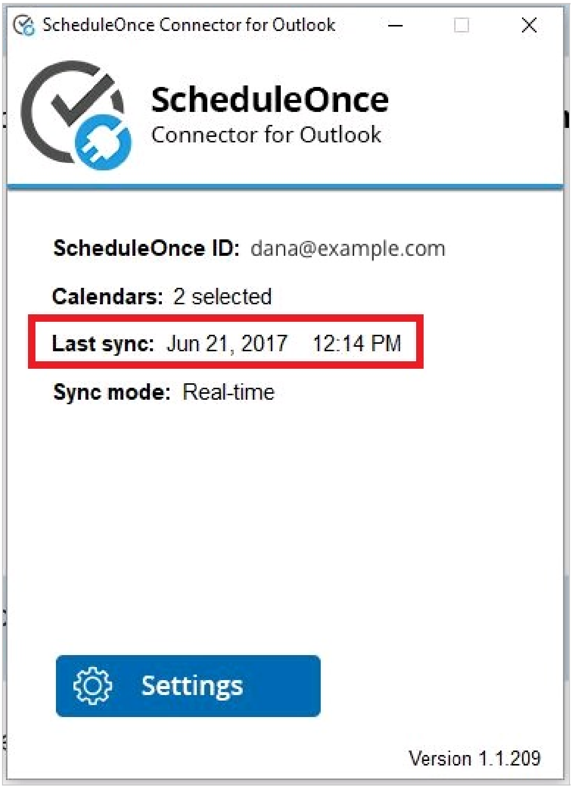


Figure 2: Last sync

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.

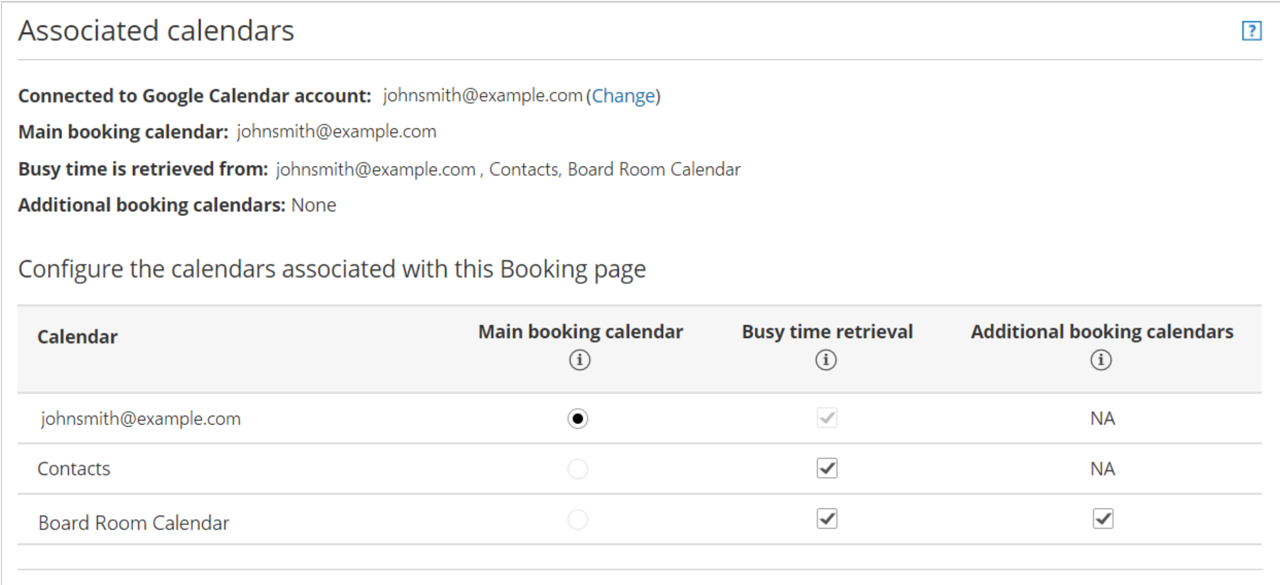


Figure 3: Associated calendars section

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).

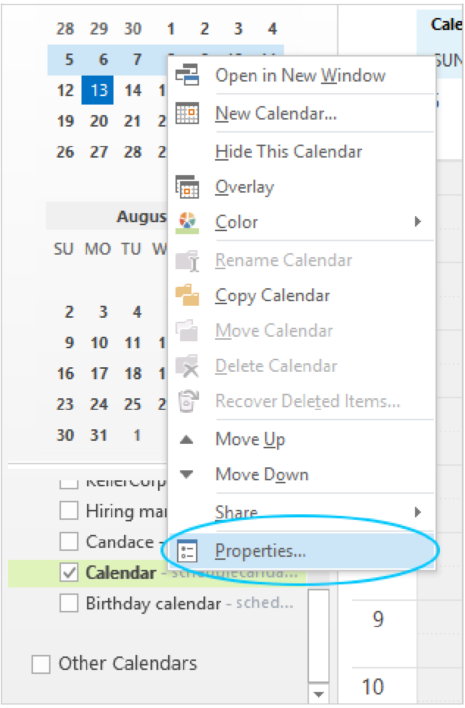


Figure 4: Calendar properties

Go to **Properties -> Permissions -> Permission level** (Figure 5). Ensure that you still have read/write capabilities for the calendar.

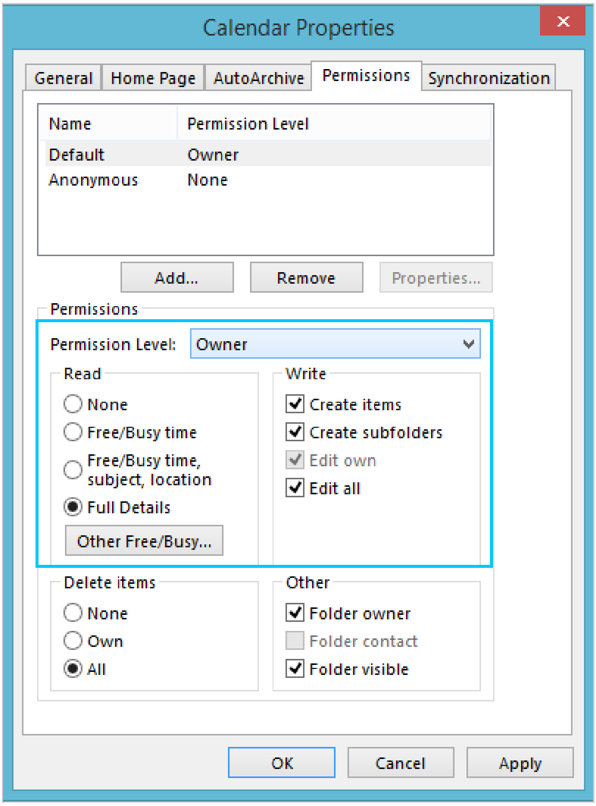


Figure 5: Permissions

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.

Disabiling compatibility view in Internet Explorer

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

Outlook connector is not syncing and displays an alert

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).

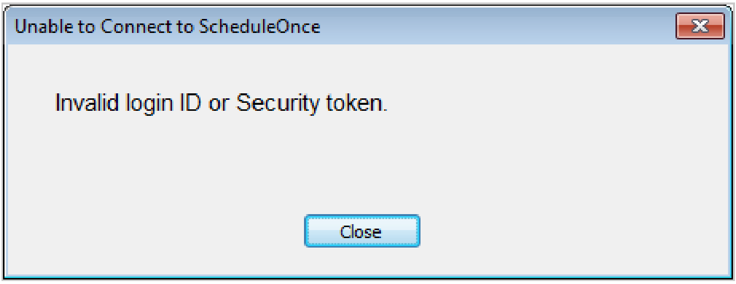


Figure 1: Unable to Connect to OnceHub pop-up

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).

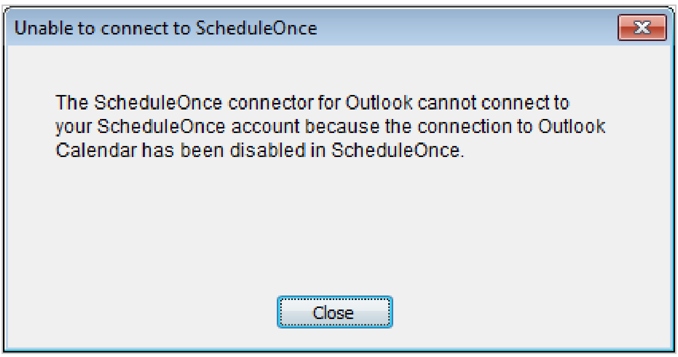


Figure 2: Unable to Connect to OnceHub pop-up

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):

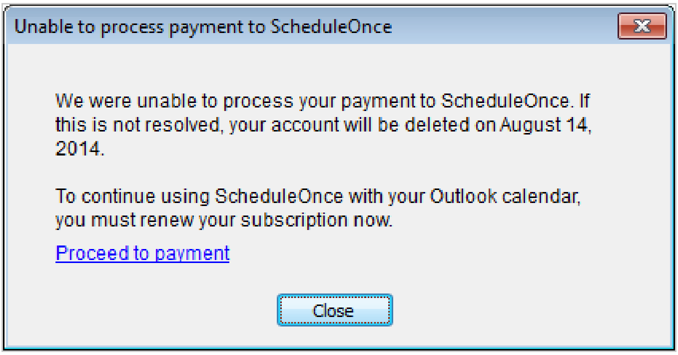


Figure 3: Unable to Connect to OnceHub pop-up

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

Generating an Outlook connector log file

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).

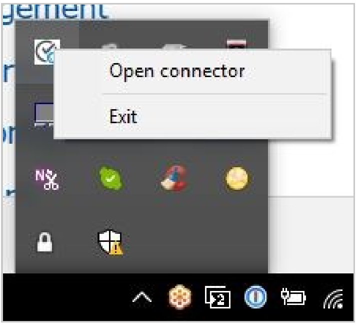


Figure 1: PC Connector icon

   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.

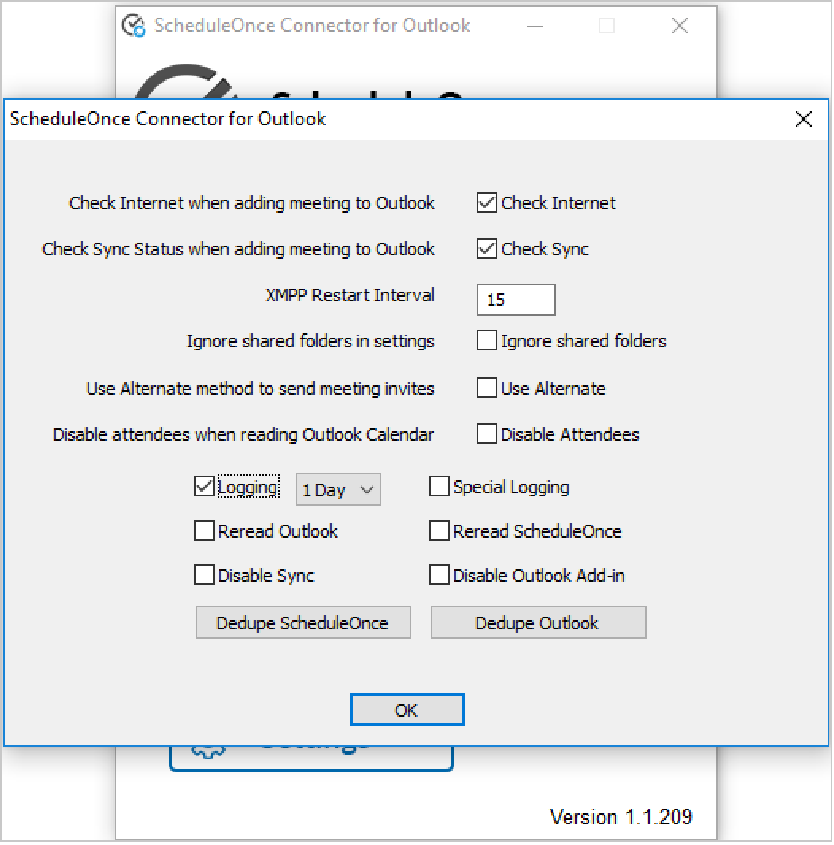


Figure 2: OnceHub Connector for Outlook menu pop-up

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.

Switching from the PC connector for Outlook to Office 365 integration

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.

Outlook connector is affecting my Outlook performance

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.

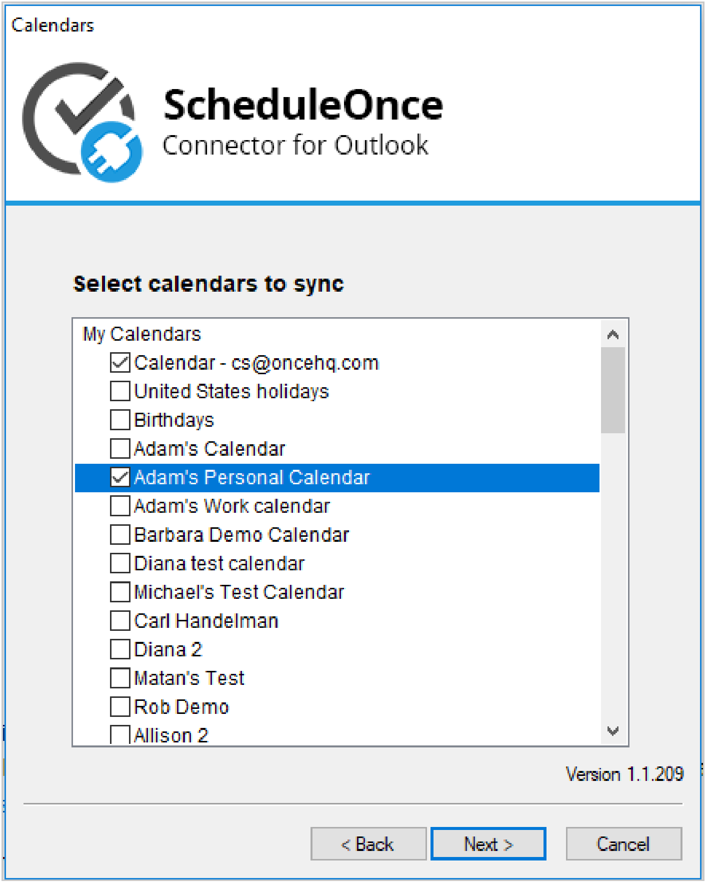


Figure 1: Calendars

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).

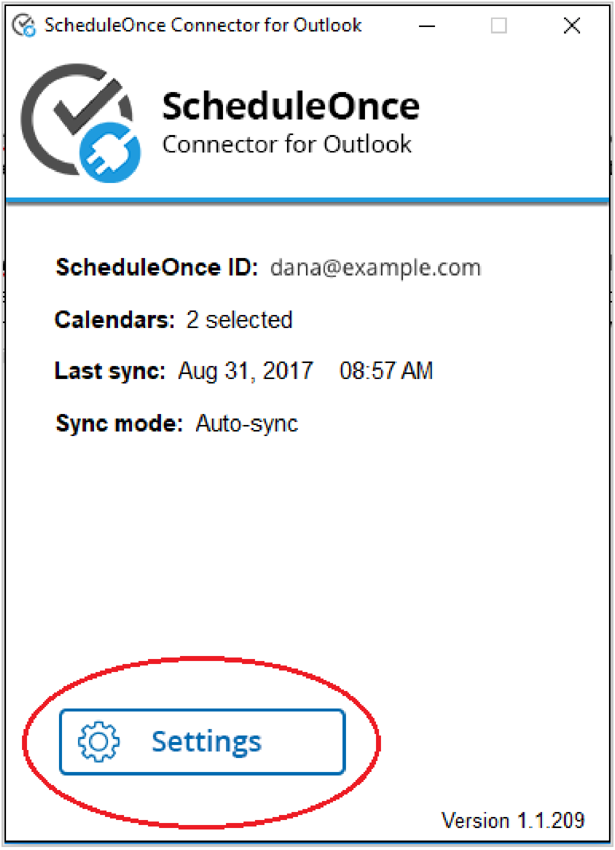


Figure 2: Connector settings

- Go through the setup wizard, select Every 5 minutes on the final step, and click Finish (see Figure 3).

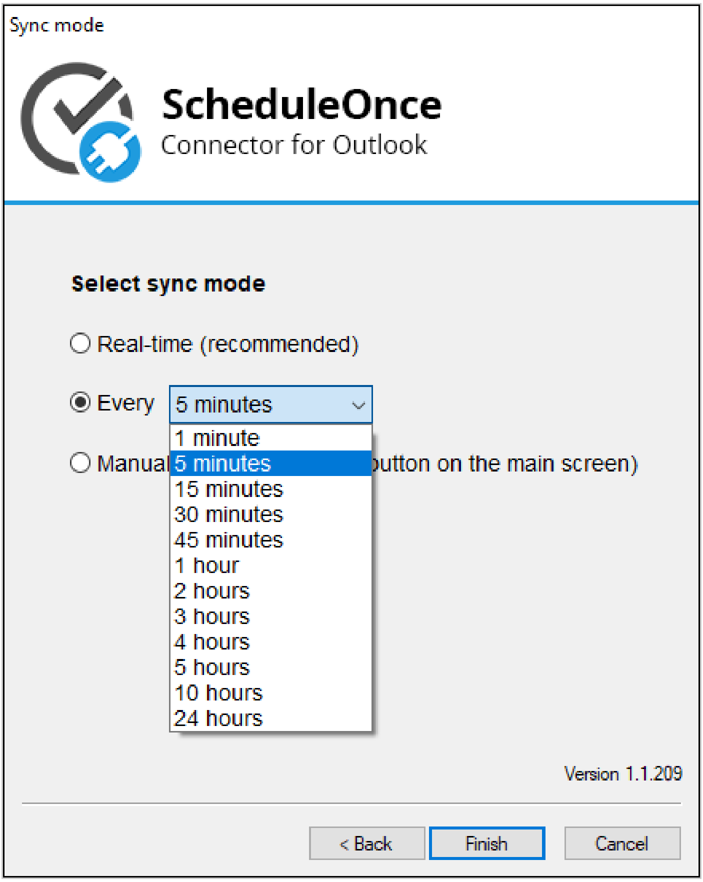


Figure 3: Sync mode settings

- 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 Security token is invalid

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.

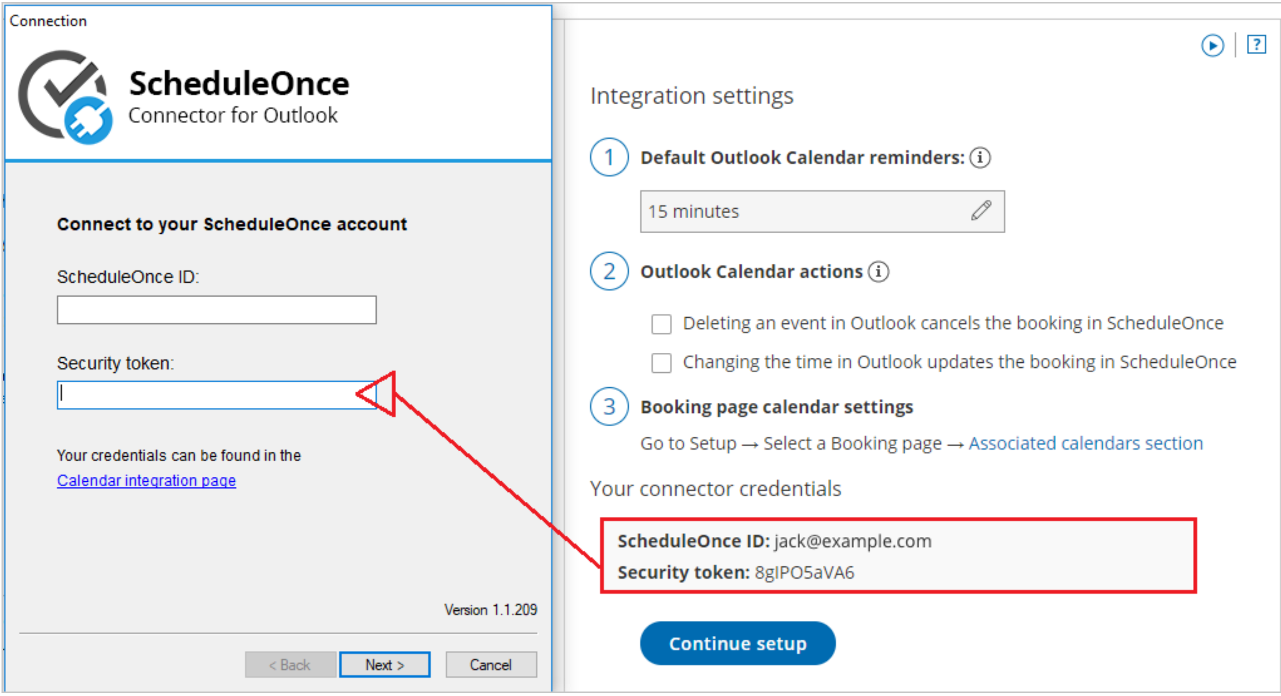


Figure 1: Connector credentials

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).

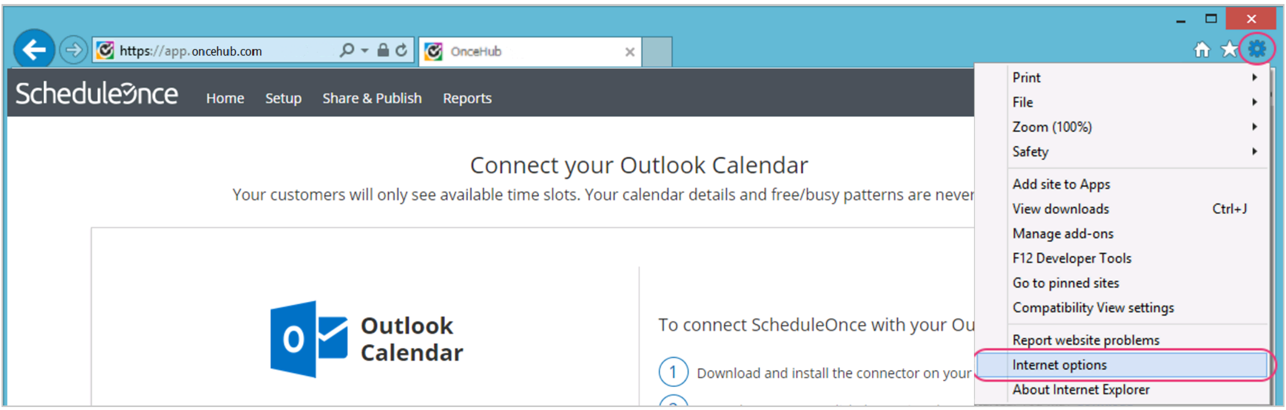
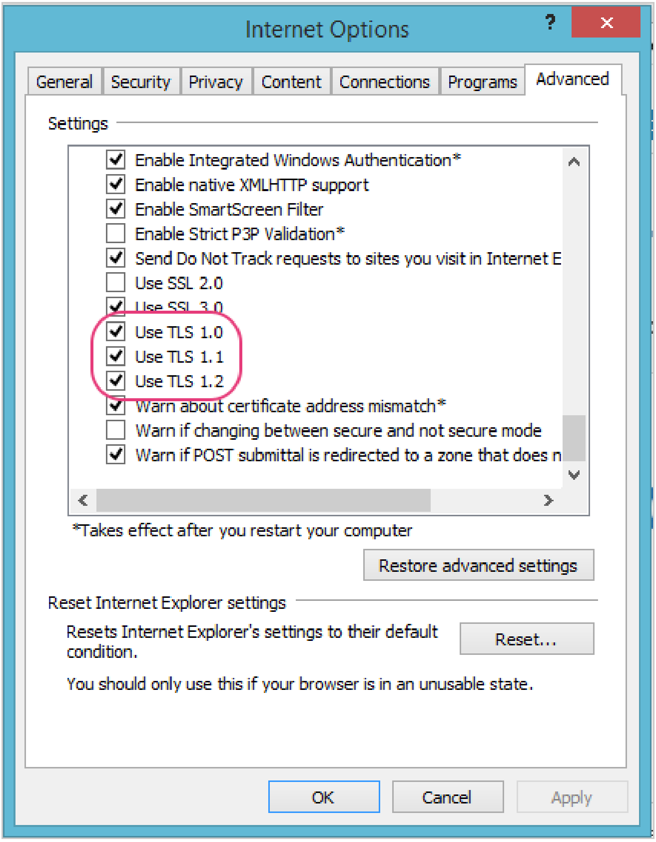


Figure 2: Internet options

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.

.

The selected Outlook calendar is invalid

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:

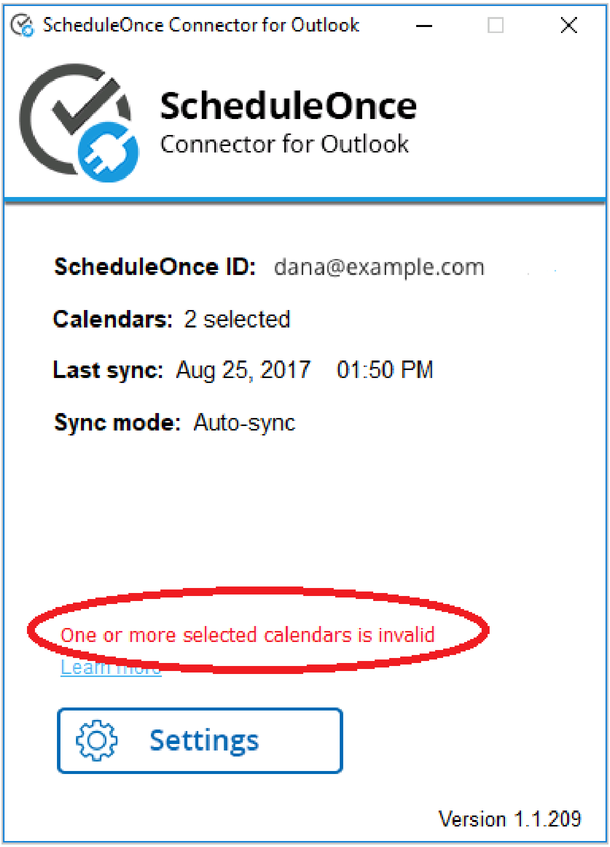


Figure 1: Invalid calendar

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.

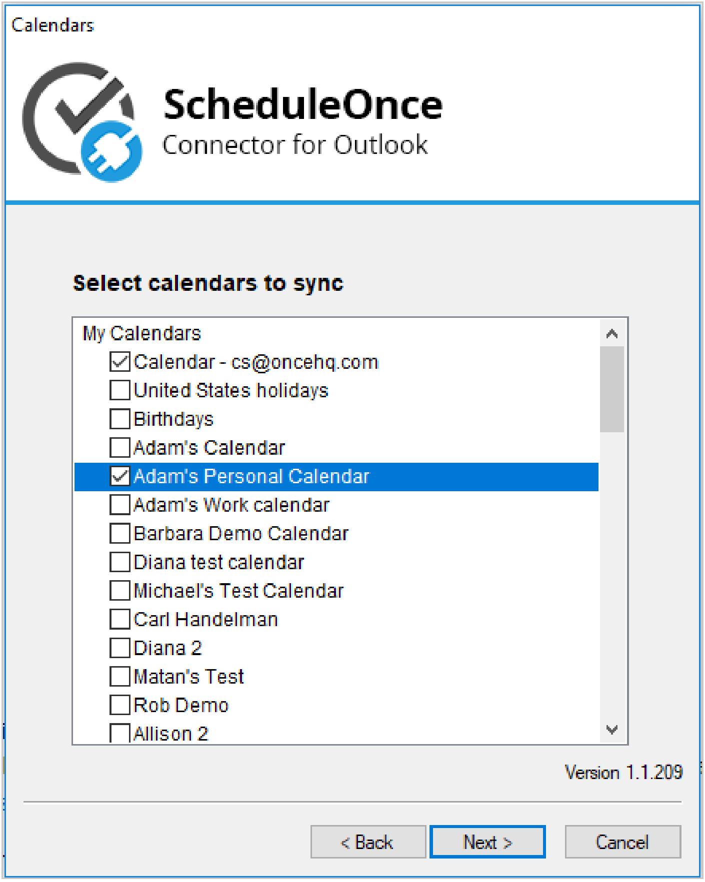


Figure 2: Select calendars

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

Disabling the Outlook security alert

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:

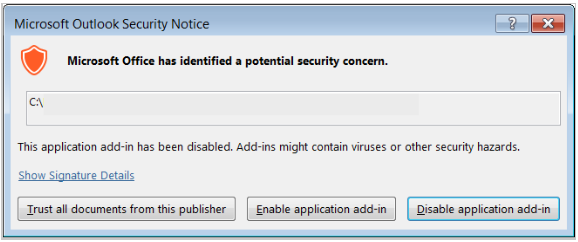


Figure 1: Outlook security notice

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.

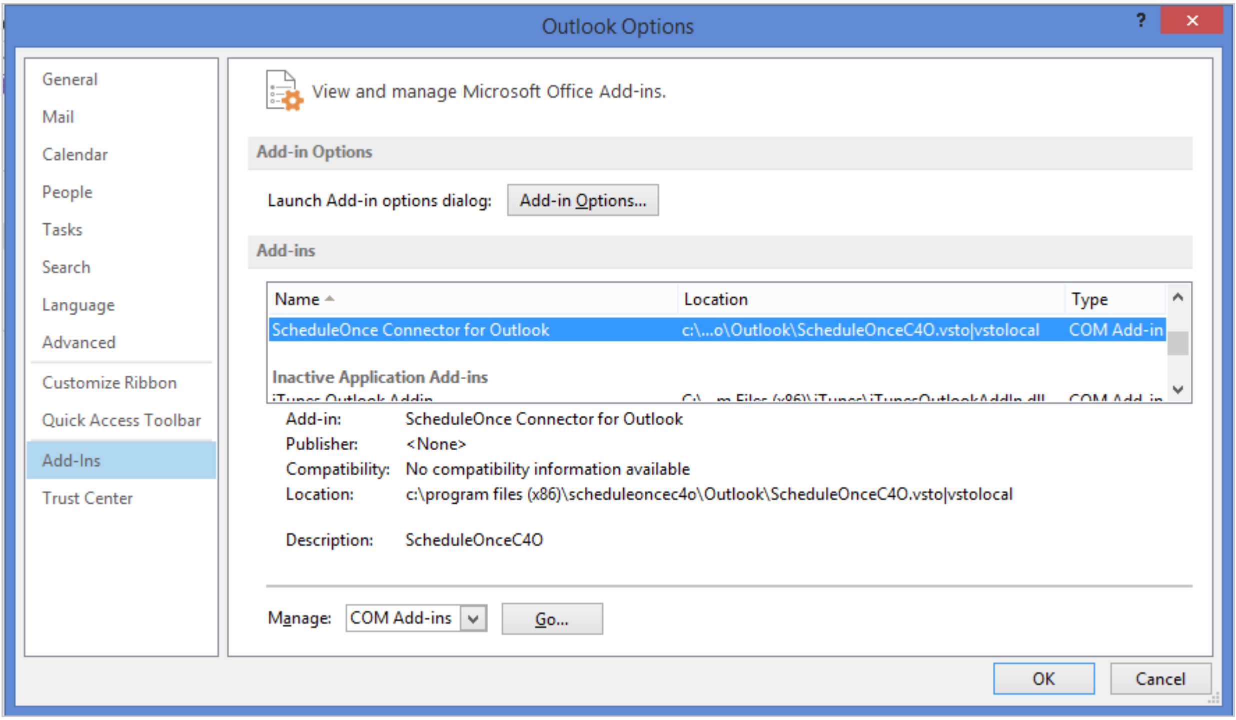
Upgrading the Outlook connector with a clean reinstall

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.

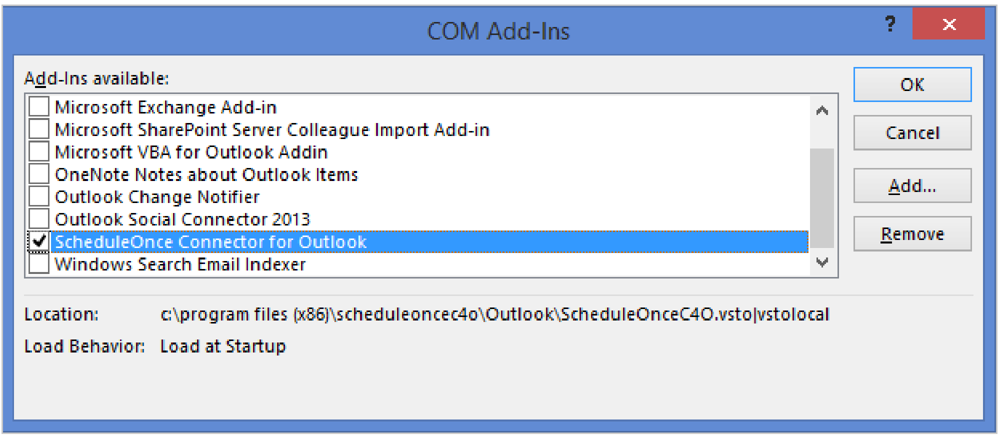
If that fixes the issue, there is no need to read further. If the problem still persists, you might need to perform a clean reinstall:

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.

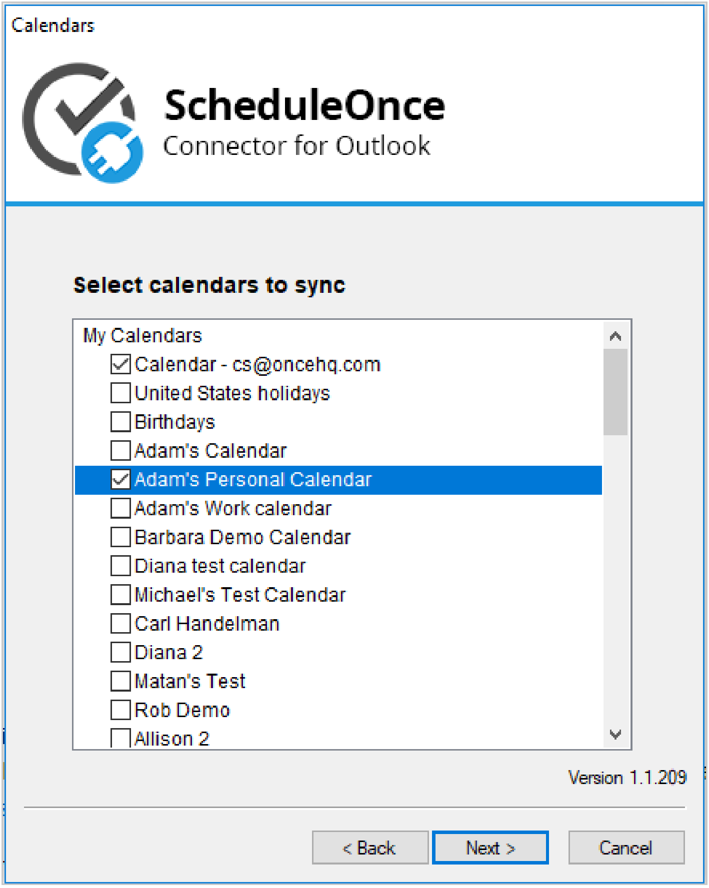


- In the COM Add-in window, check the OnceHub connector for Outlook, click Remove, and finally OK.

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.

No Outlook calendars are showing in the Select calendars to sync step

The calendar selection step allows you to choose which calendars you'd like to sync with OnceHub.



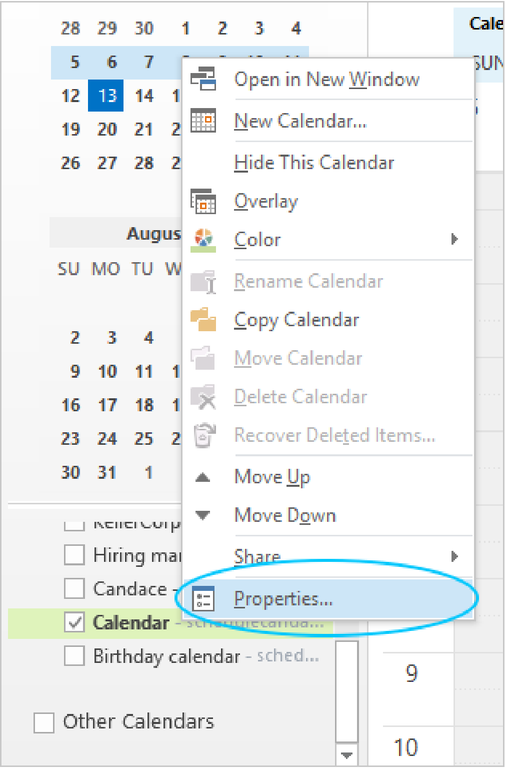
If it appears blank, there are a few steps you can follow to determine what might be causing the issue.

Quit and reboot connector

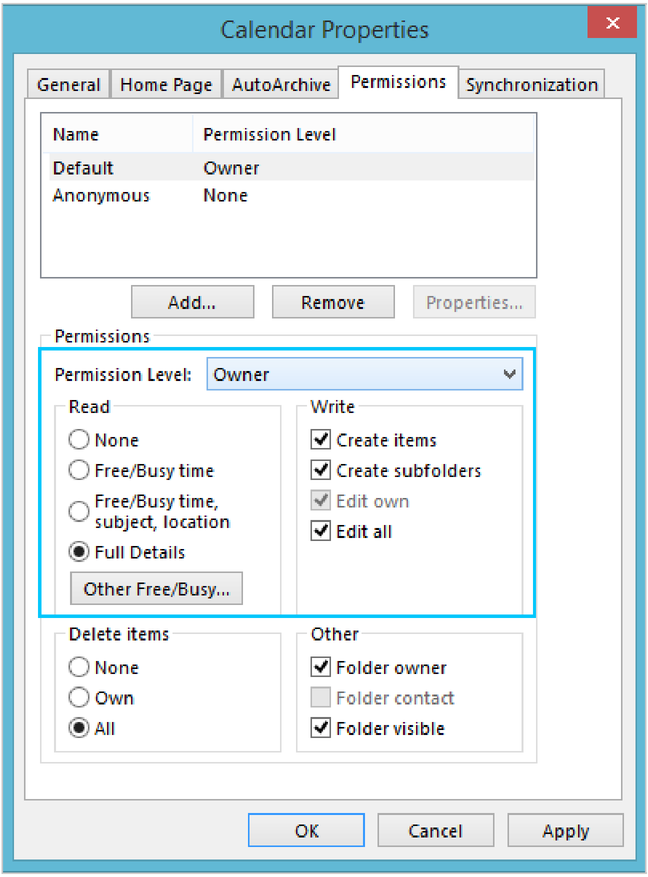
The first recommendation is to quit the connector and reboot it. You can do this by right-clicking on the square, blue and white SO icon in your taskbar icons. Select Exit. You can re-open the OnceHub connector for Outlook through the shortcut created on your Windows Desktop.

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

Affinity FAQ

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

Accept Meetings via Phone with Conversational Scheduling

Placeholder article

How Do I Find My Google Tag Manager Tracking ID

Reference article

Viewing Booking Capacity for Your Booking Calendars

Article in progress

How to Embed Your Booking Calendar on Your Website

Non-public article

Pooled availability

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.

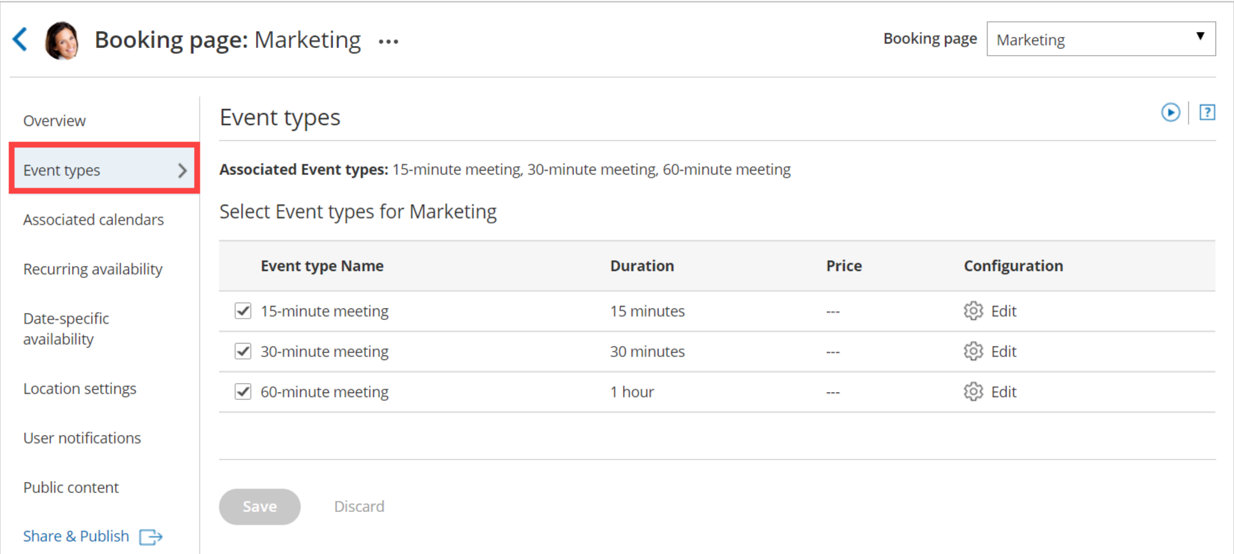


Figure 1: Event types section

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

User action: Cancel or reschedule when connected via the PC connector for Outlook

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.

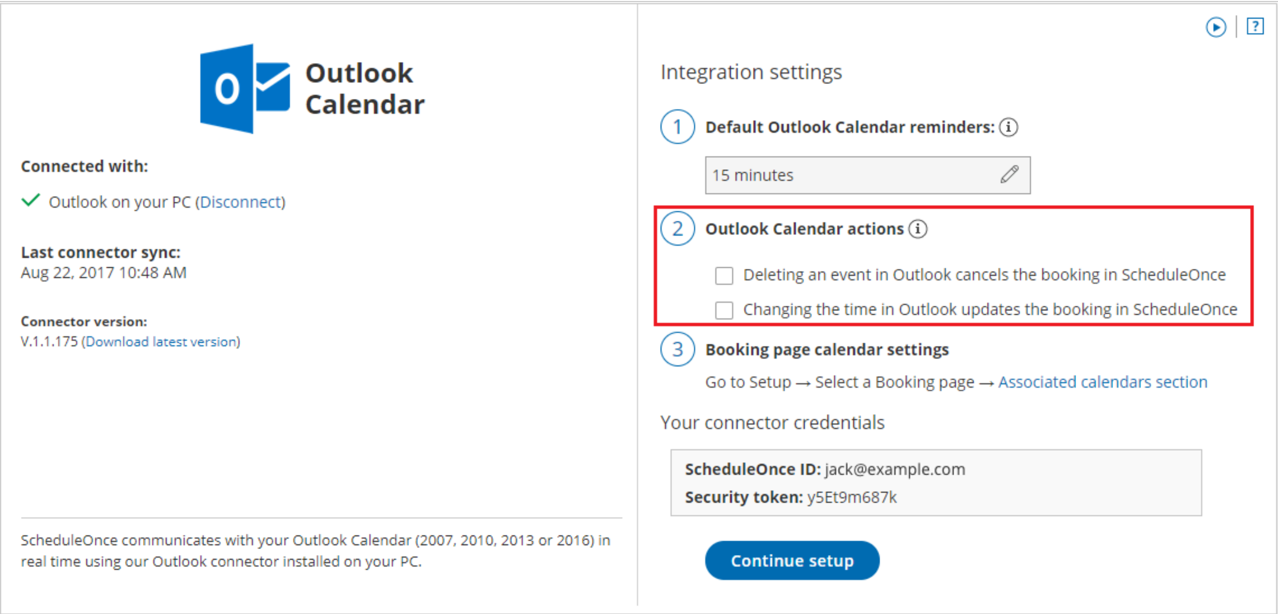


Figure 1: Outlook Calendar integration settings

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

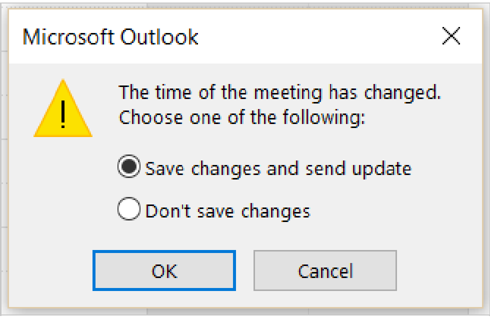


Figure 2: Send update to Customer

OnceHub Booking page security

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:

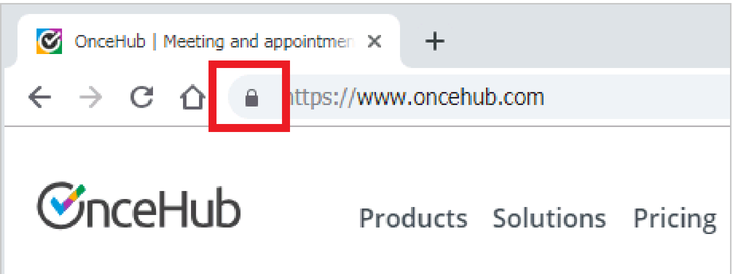


Figure 1: Lock icon in browser address bar

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

Add an AI bot

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).

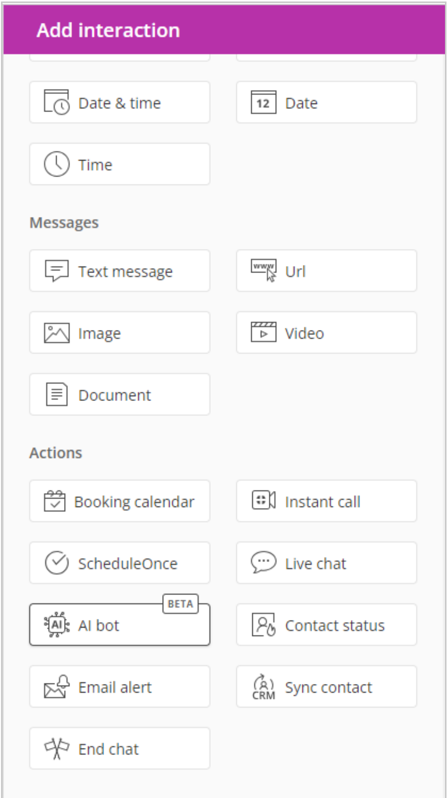


Figure 1: AI bot interaction

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).

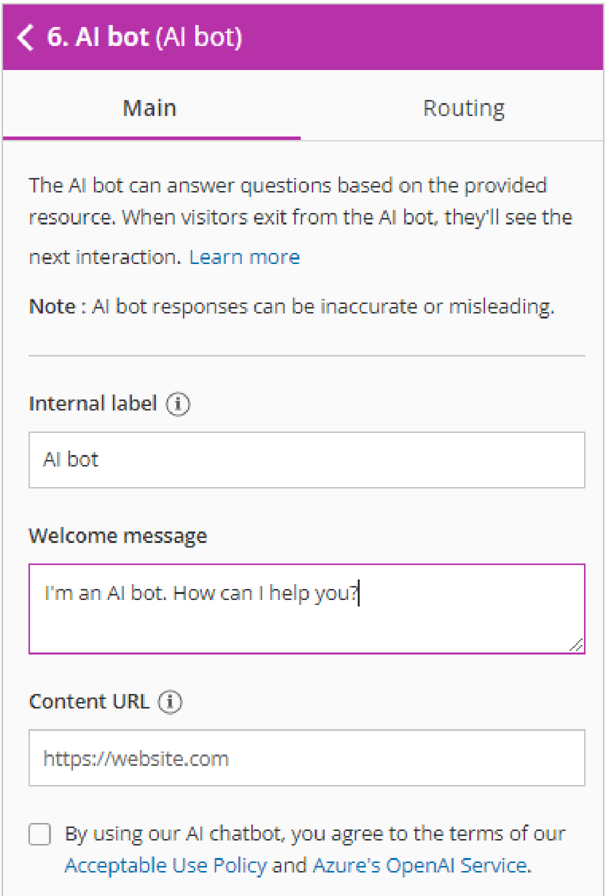


FIgure 2: AI bot settings

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).

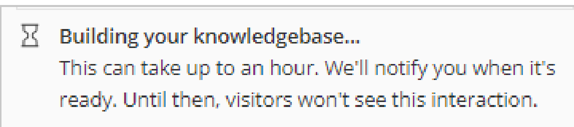


Figure 3: Wait message

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.

How to customize the API User's Profile when working in advanced secure mode

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.