Configuring Salesforce connector settings on a Booking page

Last Modified on Oct 18, 2022

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

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

> **In this article:**
>
> - Requirements
> - Configuring the Salesforce connector settings

Requirements

To configure the Salesforce connector settings, you must:

- Be connected to Salesforce.
- Be the Owner or an Editor of the Booking page.

Configuring the Salesforce connector settings

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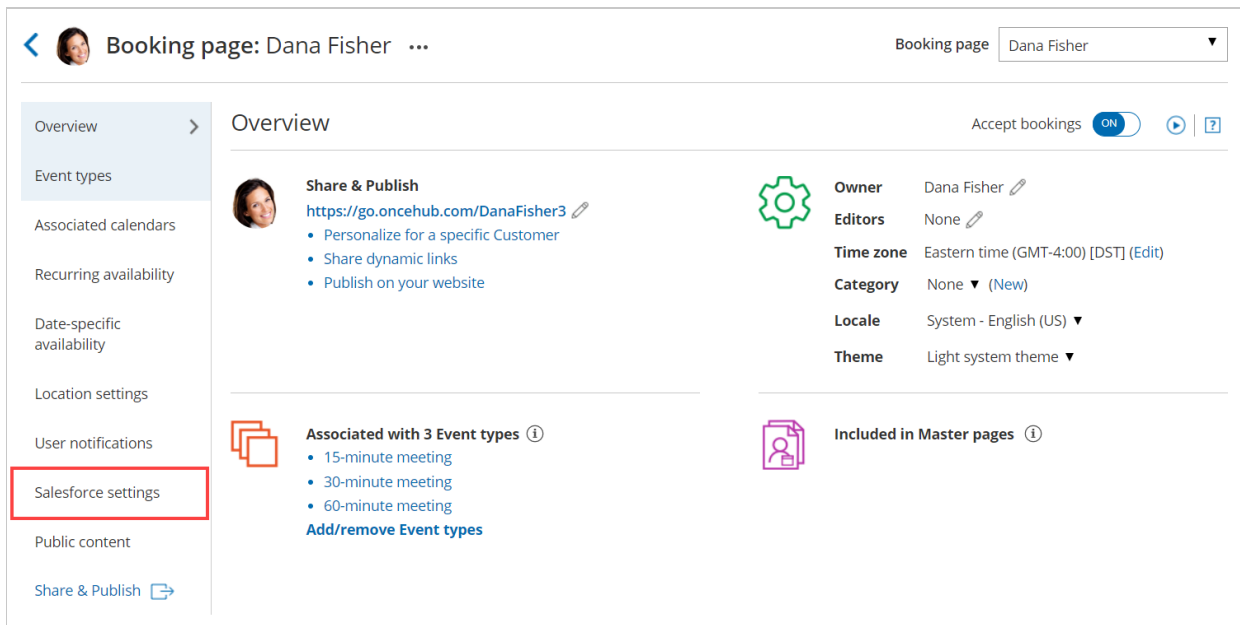

Figure 1: Salesforce settings on a Booking page

2. On the **Salesforce settings** page (Figure 2), you can map the Record Types for the supported objects, set up the Salesforce Activity Event option, and choose the type of record to be created when using General links.

Salesforce settings

Salesforce Record Types

Displaying Record Types assigned to the Salesforce Profile or Permission Set of danafisher@example.com Learn more

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

Lead Record Type	Website Leads ▾
Contact Record Type	Customer ▾
Account Record Type	Enterprise ▾
Case Record Type	-- Master Case Record Type --
Event Record Type	-- Master Event Record Type --

Salesforce Activity Event creation

When a booking is made

◉ Always create a Salesforce Event

○ Do not create a Salesforce Event

Bookings created via General links

When a booking is made

◉ Create or update Salesforce Leads

○ Create or update Salesforce Contacts

○ Create or update Salesforce Cases

○ Do not create or update Salesforce objects

> When using Personalized Salesforce links, the object integration is determined by the Salesforce Record ID passed in the URL.

Save   Discard

Figure 2: Salesforce settings

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.