OnceHub Support

Salesforce scheduling buttons for Contacts, Leads and Cases

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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.

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	Marketing	Home Chatt	er Campaigns N	🗸 Leads 🗸	Contacts 🗸	Opportunities	∨ Reports	∽ * More	•	0
×	Lead Ed Bolton		= \\\\\ - \\\\\\\\\\\\\\\\\\\\\\\\\\	D.O.U <i>U</i>	+ Follow	Book session	Schedule su	ipport session	New Case	
Title	Compar Examp		Phone (2) ▼ 789789789	Email edbolton@	୬example.com					

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.

In this article:

- Requirements
- Creating a button in Salesforce
- Adding a button to Salesforce Page Layouts

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).

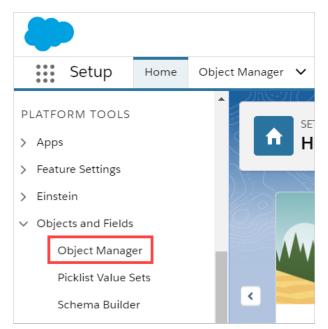


Figure 2: Object Manager in the Objects and Fields menu

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).

SETUP Object Manager 51+ Items, Sorted by Label	
Email Wessage	Emainviessage
Event	Event
Image	Image
Individual	Individual
Lead	Lead
Macro	Macro
Messaging Session	MessagingSession

Figure 3: Lead in the Object Manager list

5. Select Buttons, Links, and Actions -> New Button or Link (Figure 4).

SETUP > OBJECT MANAG	ER	10250M			51 m 210 21	
Details	Buttons, 21 Items, Sort		Quick Find	New A	ction New Button	or Link
Fields & Relationships	LABEL	NAME	DESCRIPTION	Ι ΤΥΡΕ	CONTENT SOURCE	OVERI
Page Layouts	Accept	Accept			Standard page	
Lightning Record Pages					C	_
Buttons, Links, and	Accept	MassAccept			Standard page	_
Actions	Add to Call	MassCreateCallLis	st		Standard page	- 1
Compact Layouts	List					
Field Sets	Add to Call List	CreateCallList			Standard page	

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.

ustom Button or Link E	Jit Save Quick Save Preview Cancel
	Label Schedule a sales call
	Name Schedule_a_sales_call
Descri	ption Use this button to schedule a sales call with this contact.
Display	Type O Detail Page Link View example
	Detail Page Button <u>View example</u> List Button <u>View example</u>
Beh	avior Display in new window View Behavior Options
Content S	URL T
Select Field Type	inseri Tielo
Lead	Insert Merge Field Insert Operator

Figure 5: New Button or Link pane

7. Copy the following link and paste it in the large text box (Figure 6).

 $\label{eq:https://go.oncehub.com/EXAMPLEBOOKINGPAGE?soSkip=1&sosfLeadId=\{!Lead.Id\}&sosfContactId=\{!Contact.Id\}&sosfCaseId=\{!Case.Id\}&sosfCaseId\}&sosfCaseId=\{!Case.Id\}&sosfCaseId\}&sosfCaseId=\{!Case.Id]&sosfCaseId=\{!Case.Id]&sosfCaseId=\{!Case$

ustom Button or Link Edit	Save Quick Save Preview Cancel
Label	Schedule a sales call
Name	Schedule_a_sales_call
Description	Use this button to schedule a sales call with this contact.
Display Type	Detail Page Link <u>View example</u>
	Detail Page Button <u>View example</u>
	List Button View example
Behavior	Display in new window View Behavior Options
Content Source	URL
elect Field Type	Insert Field
elect Field Type	Insert Field

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.

Select Field Type	Insert Field	
Lead	 Insert Merge Field 	Insert Operator V
nttps://go.oncehul	o.com/EXAMPLEBOOKINGPAGE soSkip=1	1&sosfLeadId={!Lead.Id}&sosfContactId=
	fCaseId={!Case.Id}	repositionaria (
[.concace.id]abos.	[045614-[.0456.14]	

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:

 $https://go.oncehub.com/danafisher?soSkip=1\&sosfLeadId=\{!Lead.Id\}\&sosfContactId=\{!Contact.Id\}\&sosfCaseId=\{!Case.Id\}\&sosfLeadId=\{!Lead.Id\}\&sosfLeadId=\{!Case.Id\}\&sosfLeadId=\{!LeadId=\{!LeadId=\{!Lea$

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.

i 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).

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SETUP > OBJECT MANAGER	
Details	Page Layouts 4 Items, Sorted by Page Layout Name
Fields & Relationships	PAGE LAYOUT NAME
Page Layouts	Lead (Marketing) Layout
Lightning Record Pages	
Buttons, Links, and Actions	Lead (Sales) Layout
Compact Layouts	Lead (Support) Layout
Field Sets	Lead Layout
Object Limits	

Figure 8: Page Layouts

2. In the Lead Layout editor, select Mobile & Lightning Actions (Figure 9).

SETUP > OBJECT MANAGER				
	Lead Layout 🔻			
Details	Save V Quick Save Prev	iew As 🔻 Canc	el 🛛 🔷 Red	o 🛛 🔳 Layout Properties
Fields & Relationships	Fields	Quick Fir	nd Mobile Action Name	×
Page Layouts	Buttons Quick Actions		File Find Duplicates	Log a Call Mobile Smart Actions
	Mobile & Lightning Actions		Get Survey Invita	New Account
Lightning Record Pages	Expanded Lookups	obile only)	Link	New Case
Buttons, Links, and Actions	Related Lists Report Charts	•		
Compact Layouts				

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).

ds 🔺	Q Quick Fin	d Mobile Action Name	*					
ons		File	Log a Call	New Contact	New Note	Post	Schedule a sales	Submit for Approv
ck Actions		Find Duplicates	Mobile Smart Actions	New Event	New Opportunity	Printable View	schedule support	-
ile & Lightning		Get Survey Invita	New Account	New Group	New Task	Question	Send Text	1
anded Lookups	obile only)	Link	New Case	New Lead	Poll	Schedule appointment	Sharing	
ted Lists	4							
ated Lists		periopee						
ted Lists		perience						
ed Lists et Charts			v Task Log a Ci	all New Cas	se New Note	New Event	Link Poll	Question
ted Lists alesforce Mobile and ctions i Schedule a sales call	d Lightning Ex	File Nev	v Task Log a Ca eck for New Data			New Event Record Type Edi		

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.