Salesforce scheduling buttons for Contacts, Leads and Cases

Last Modified on Oct 18, 2022

Salesforce scheduling buttons provide a quick method to schedule on behalf of a Customer. Bookings made via these buttons are automatically added to the Salesforce record that the booking is scheduled from.

Salesforce scheduling buttons can be configured to prepopulate the booking form, or skip it altogether. This is enabled by the optional mapping step in the Salesforce setup wizard, where you can define the mapping between Salesforce record fields and OnceHub Booking form fields.

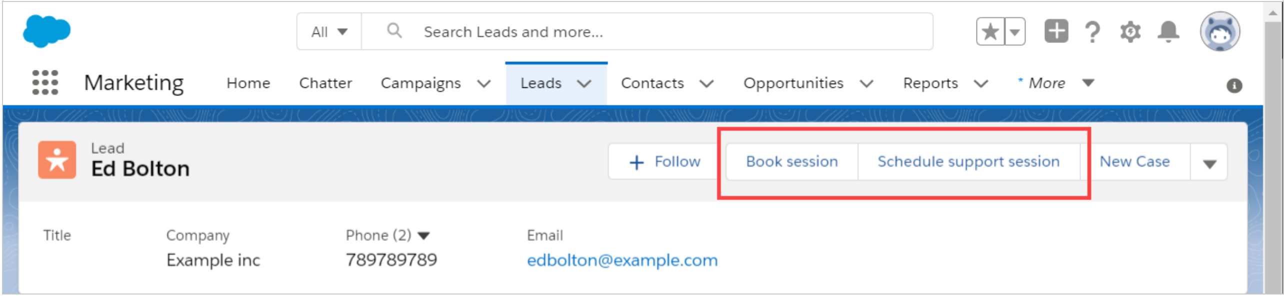

Figure 1: Salesforce scheduling buttons

In this article, you'll learn how to create a Salesforce schedule button and add it to the **Lead**, **Contact** or **Case** Page Layouts in Salesforce.

In this article:

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).

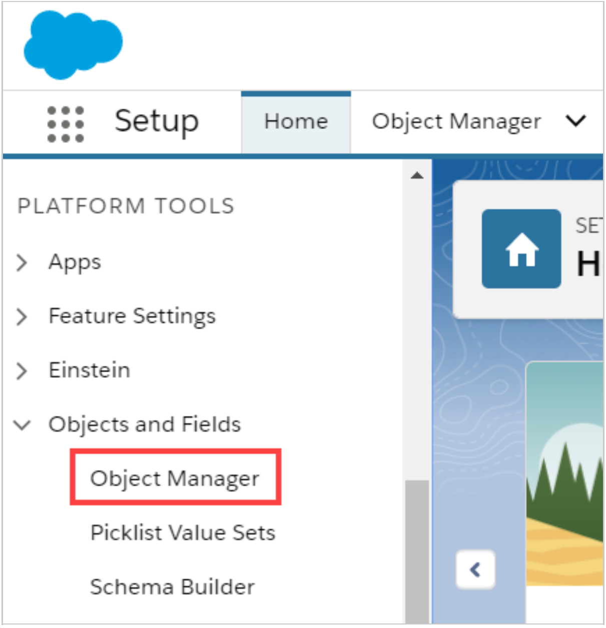

Figure 2: Object Manager in the Objects and Fields menu

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).

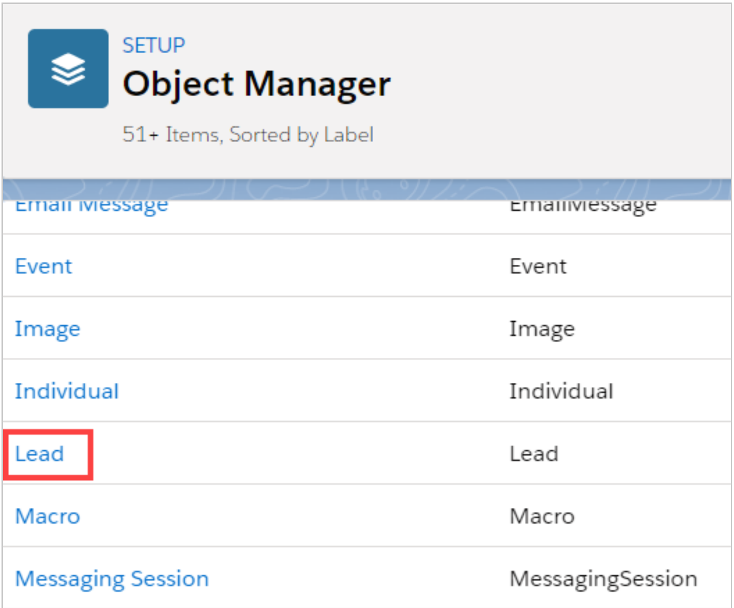

Figure 3: Lead in the Object Manager list

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

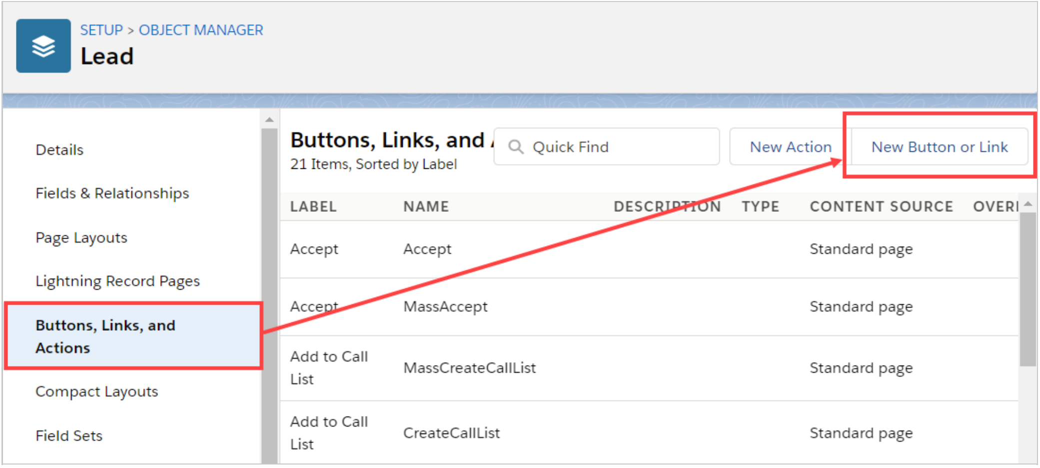

Figure 4: New Button or Link

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**.

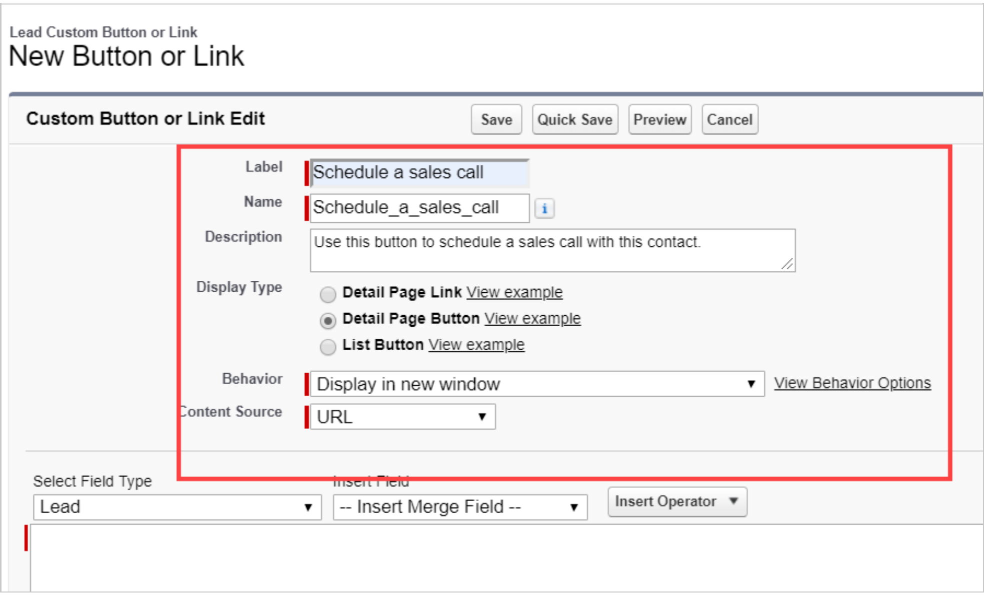

Figure 5: New Button or Link pane

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}

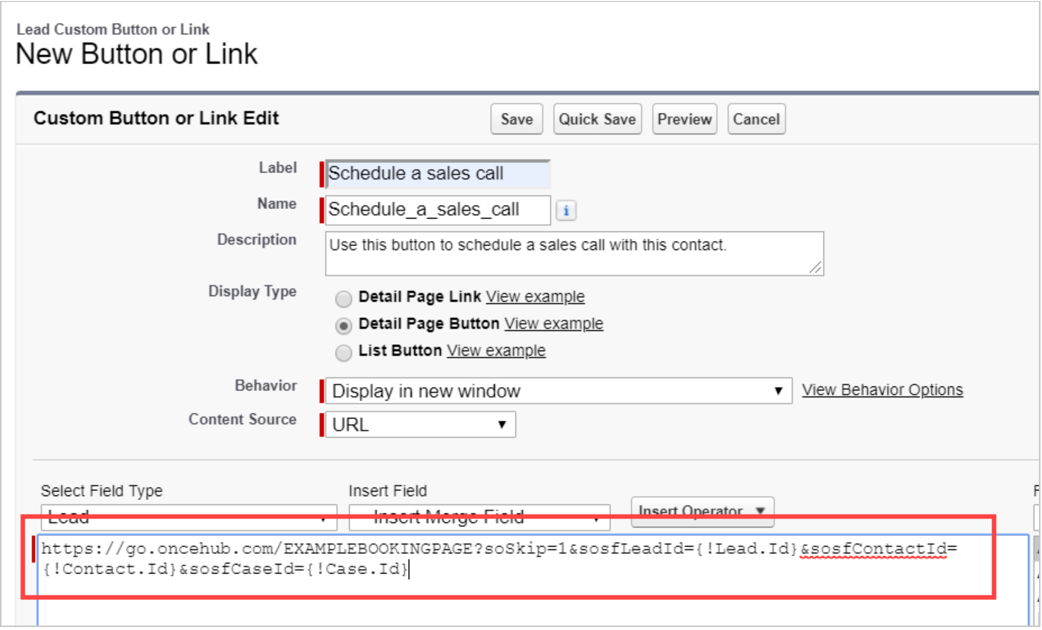

Figure 6: Paste link in the large text box

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.

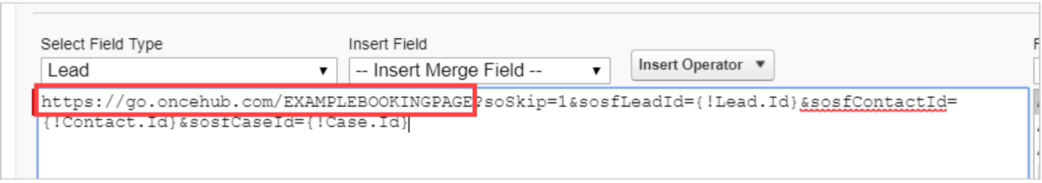

Figure 7: Placeholder URL text

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).

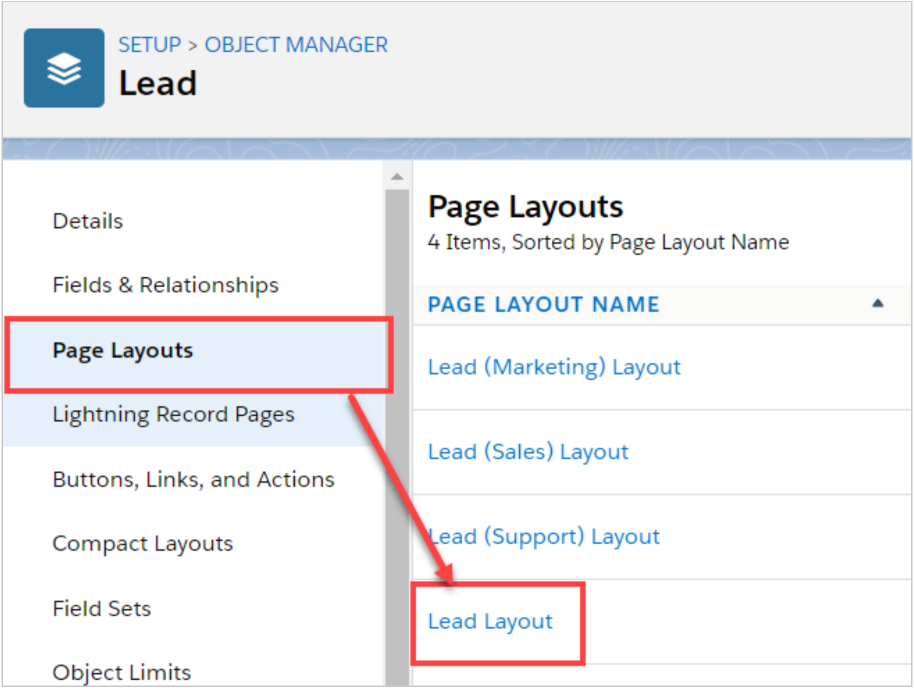

Figure 8: Page Layouts

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

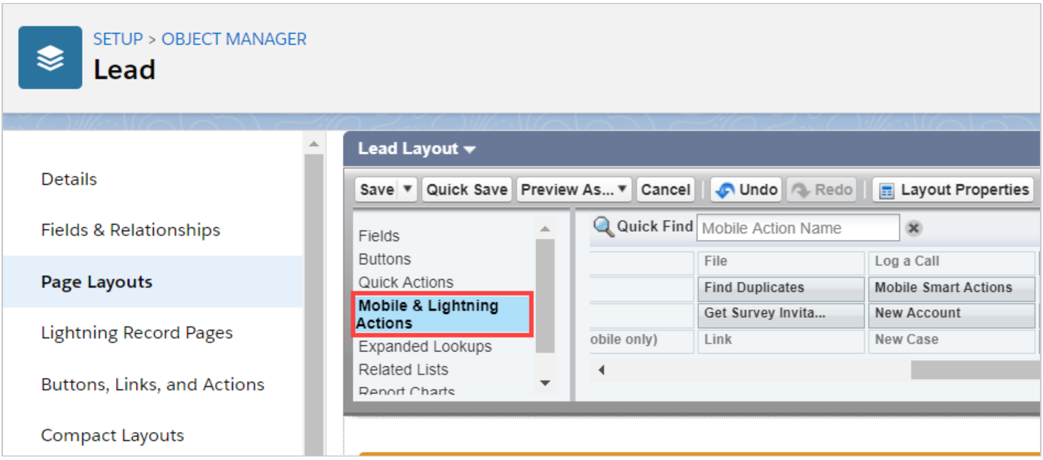

Figure 9: Mobile and Lightning Actions

3. Click and drag the button that you want to add to the **Salesforce Mobile and Lightning Experience Actions** section (Figure 10).

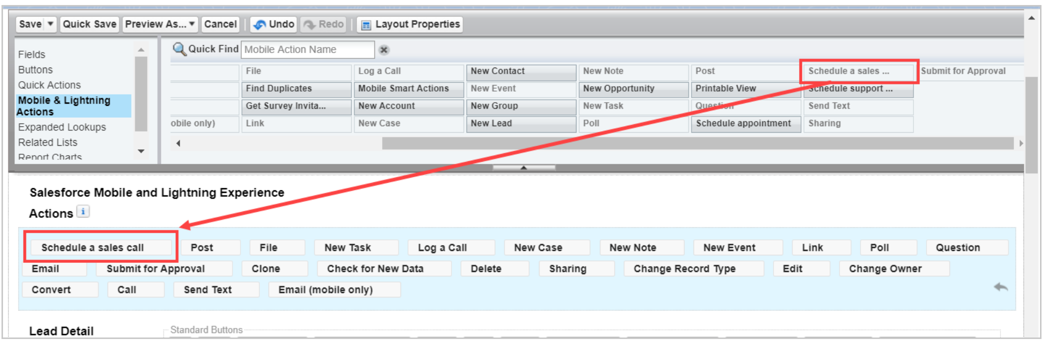

Figure 10: Add button to Salesforce Mobile and Lightning Experience Actions section

4. Click **Save**.

You're all set! Your button is now ready to use on your **Lead**, **Contact**, or **Case** pages.