

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.

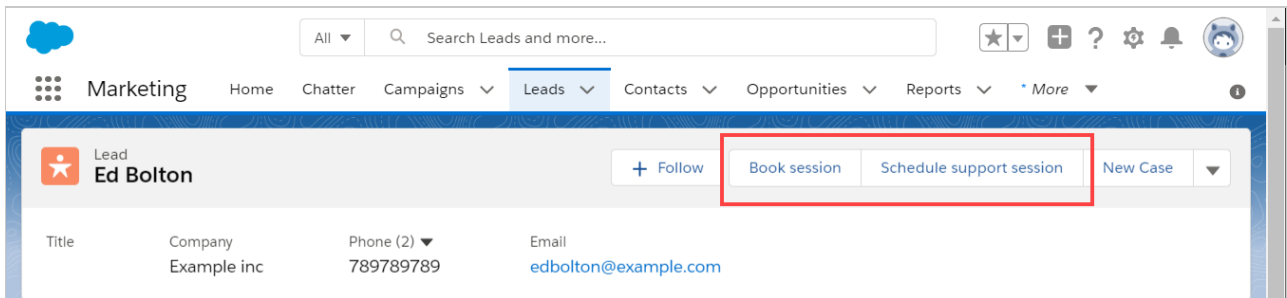


Figure 1: Salesforce scheduling buttons

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.

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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).

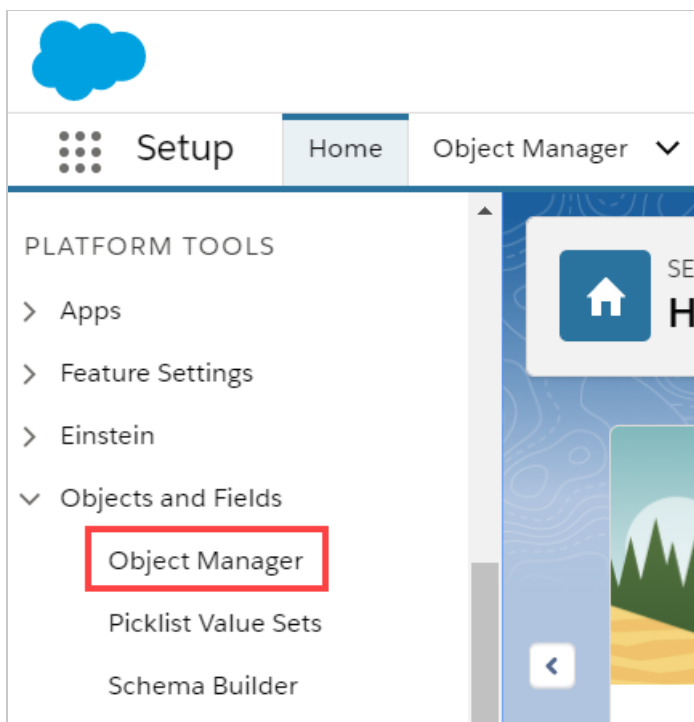


Figure 2: Object Manager in the Objects and Fields menu

- 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).

The image shows the Salesforce Object Manager interface. At the top, there is a 'SETUP' button and the title 'Object Manager' with a subtitle '51+ Items, Sorted by Label'. Below this is a table listing various objects. The 'Lead' object is highlighted with a red box.

Object Name	API Name
Email Message	Emailmessage
Event	Event
Image	Image
Individual	Individual
Lead	Lead
Macro	Macro
Messaging Session	MessagingSession

Figure 3: Lead in the Object Manager list

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

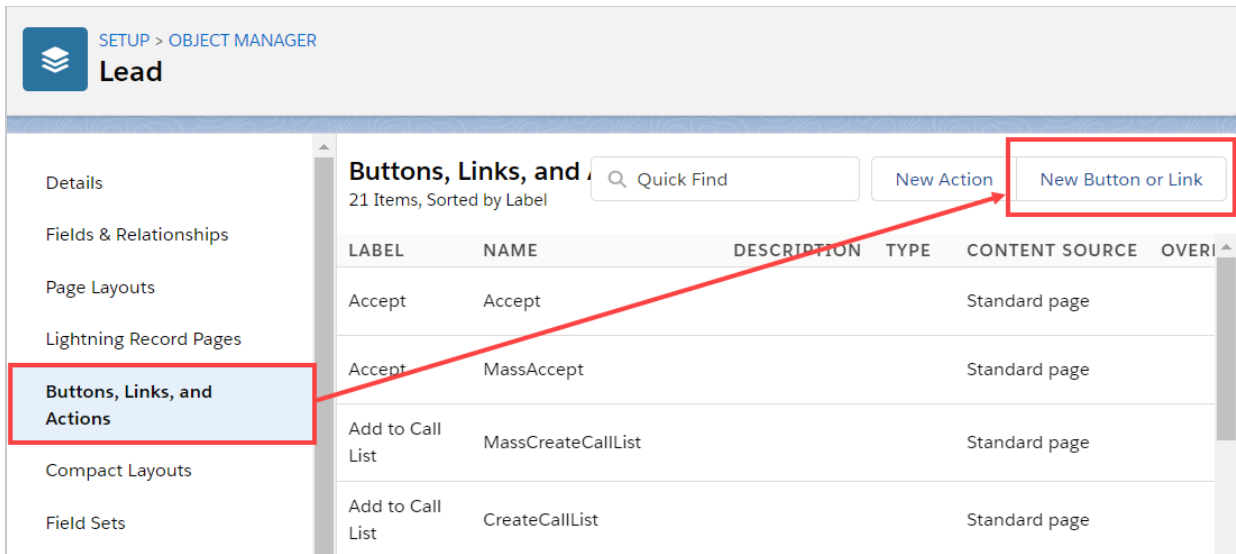


Figure 4: New Button or Link

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**.

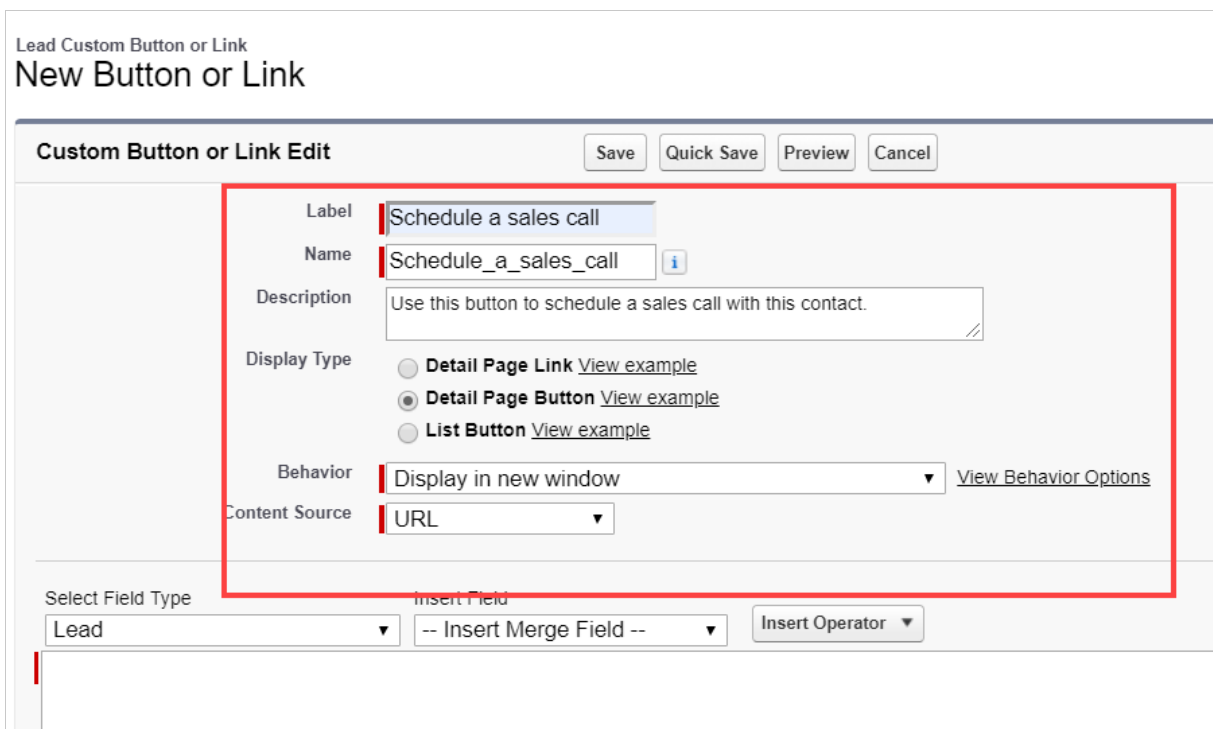


Figure 5: New Button or Link pane

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

<https://go.oncehub.com/EXAMPLEBOOKINGPAGE?soSkip=1&sofLeadId={!Lead.Id}&sofContactId={!Contact.Id}&sofCaseId={!Case.Id}>

Lead Custom Button or Link
New Button or Link

Custom Button or Link Edit [Save] [Quick Save] [Preview] [Cancel]

Label: Schedule a sales call
Name: Schedule_a_sales_call [i]
Description: Use this button to schedule a sales call with this contact.
Display Type: Detail Page Link [View example](#), Detail Page Button [View example](#), List Button [View example](#)
Behavior: Display in new window [v] [View Behavior Options](#)
Content Source: URL [v]

Select Field Type: Lead [v] Insert Field: Insert Merge Field [v] Insert Operator: [v]
[https://go.oncehub.com/EXAMPLEBOOKINGPAGE?soSkip=1&sofLeadId={!Lead.Id}&sofContactId={!Contact.Id}&sofCaseId={!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](#).

Select Field Type: Lead [v] Insert Field: -- Insert Merge Field -- [v] Insert Operator: [v]
[https://go.oncehub.com/EXAMPLEBOOKINGPAGE?soSkip=1&sofLeadId={!Lead.Id}&sofContactId={!Contact.Id}&sofCaseId={!Case.Id}]

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&sofLeadId={!Lead.Id}&sofContactId={!Contact.Id}&sofCaseId={!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).

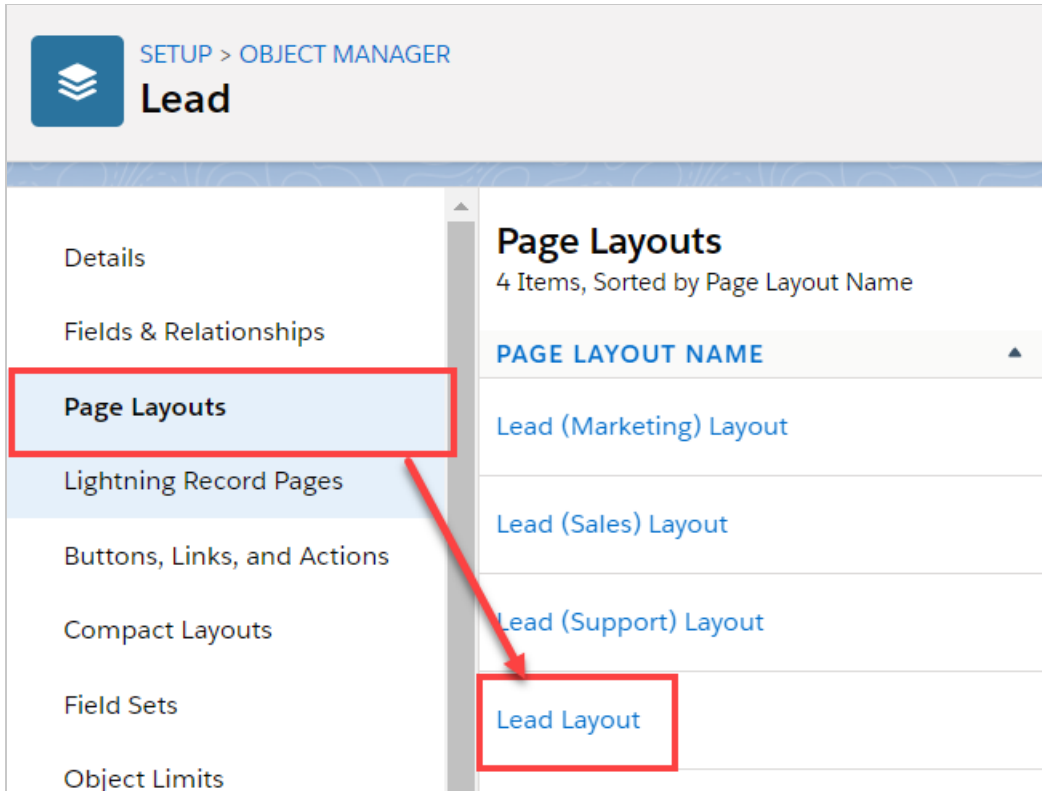


Figure 8: Page Layouts

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

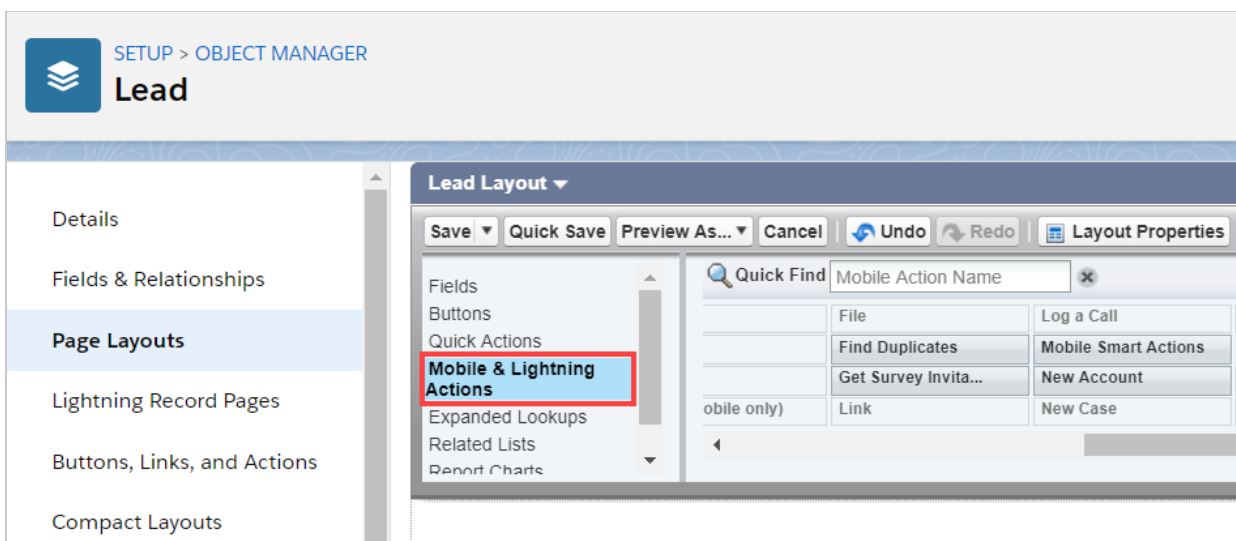


Figure 9: Mobile and Lightning Actions

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

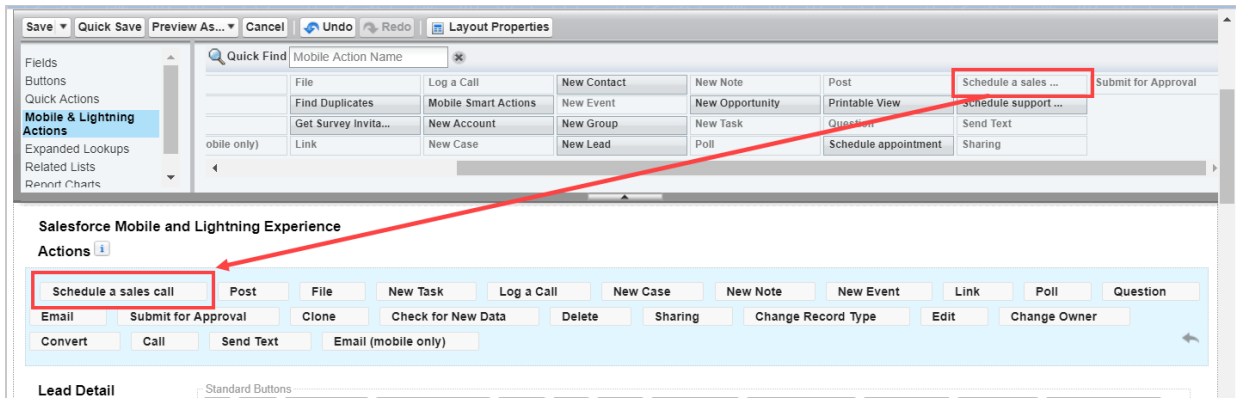


Figure 10: Add button to Salesforce Mobile and Lightning Experience Actions section

4. Click **Save**.

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