OnceHub Support

Salesforce scheduling buttons for Person Accounts

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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.

In this article:

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

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).

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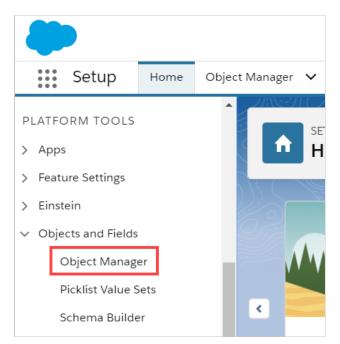


Figure 1: Object Manager in the Objects and Fields menu

4. In the **Object Manager** list, select the **Account** object (Figure 2).

\$	SETUP Object Manager 51+ Items, Sorted by Label		
LABEL			API NAME
LADEL		_	AFT MAINE
Account			Account
Active Sc	ratch Org		ActiveScratchOrg
Activity			Activity
Asset			Asset
Asset Rel	ationship		AssetRelationship

Figure 2: Account object in the Object Manager list

5. Select Field & Relationships -> New (Figure 3).

SETUP > OBJECT MANAGER Account					
Details	Fields & Relationshi		Q Quick Find	New Field Dependencie	s Set History Tracking
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Account Name	Name	Name		~
Lightning Record Pages	Account Number	AccountNumber	Text(40)		
Buttons, Links, and Actions	Account Owner	OwnerId	Lookup(User)		~
Compact Layouts	Account Record Type	RecordTypeId	Record Type		~
Field Sets	Account Site	Site	Text(80)		
Object Limits	Account Source	AccountSource	Picklist		•

Figure 3: Fields & Relationships

6. In the New Custom Field pane, select Lookup Relationship and click Next (Figure 4).

Account New Custom Field	Help for this Page 🥑
Step 1. Choose the field type	Step 1
	Next Cancel
Specify the type of information that the custom field w	vill contain.
Data Type	
None Selected	Select one of the data types below.
Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary	A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
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 popup 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 outside the Salesforce org.

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

New Relationship	Help for this Page 🥹
Step 3. Enter the label and name for the lookup field	Step 3 of 6
	Dressinger Next Cancel
Field Label Contact	1
	1
Description	
Help Text	

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.

(i) 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.

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- 3. Select the **Account** object.
- 4. Select Buttons, Links, and Actions -> New Button or Link (Figure 6).

Account					
Details	Buttons, Links, an 16 Items, Sorted by Label	nd Actions	Q Quick Find	New Action	New Button or Lir
Fields & Relationships	LABEL	NAME	DESCRIPTION TYPE	CONTENT SOURCE OVERR	IDDEN
age Layouts	Accounts Tab	Tab		Standard page	-
ightning Record Pages Buttons, Links, and	Add to Call List	MassCreateCallList		Standard page	•
actions	Add to Call List	CreateCallList		Standard page	•
ield Sets	Add to Campaign	AccountAddToCampaign		Standard page	
Object Limits	Billing	Billing	Detail Page Link	URL	

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}

Custom Button or Link Edit	Save Quick Save Preview Cancel
Label	Schedule with related Con
Name	Schedule_with_related_Cc
Description	This button allows you to schedule meetings on behalf of the Contact related to this Person Account record.
Display Type	Detail Page Link <u>View example</u>
	Detail Page Button View example
	List Button <u>View example</u>
Behavior	Display in new window View Behavior Options
Content Source	URL V
Select Field Type	Insert Field
Account	Insert Merge Field Insert Operator
https://go.oncehub.com/H {!Account.Contact_IDid_	ZXAMPLEBOOKINGPAGE?so&Skip=1&sfLeadId={!Lead.Id} <u>&sfContactId</u> = _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.

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ccount	 Insert Merge Field Insert Operator 	
tps://go.oncehub	.com/EXAMPLEBOOKINGPAGE?so&Skip=1&sfLeadId={!Lead.Id}&sfContactId	=
	IDid c}&siCaseld={!Case.Id}	
Account.contact_	IDIQC}&SICASEIG={:Case.10}	

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.

i 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.