# **OnceHub** Support

### Adding Custom fields to the Salesforce Activity Event Page Layout

Last Modified on Apr 10, 2023

The Salesforce setup process includes 5 phases: API connection, Installation, Field validation, Field mapping, and Creation rules.

In this article, you'll learn how to add the **Event status** and the **Cancel/reschedule reason** fields to the Activity Event Page Layout in Salesforce.

In this article:

- Salesforce Activity Events
- Requirements
- Adding Custom fields to Activity Event Page Layout in Salesforce

#### Salesforce Activity Events

When a booking is made, a Salesforce Activity Event is always created and related to a Salesforce Lead, Contact, or Case record. The creation of the Activity Event is only the first step in the booking lifecycle. After the Activity Event is created, it is continuously updated through all phases of the booking lifecycle: **Scheduled**, **Rescheduled**, **Completed**, **Canceled**, or **No-show**. Learn more about activity statuses

The Event status and the Cancel/reschedule reason fields are provided with the OnceHub connector for

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Salesforce and are mapped to OnceHub data. When these fields are added to the Event Page Layout, they are used for updating the Activity Event with any change in the booking lifecycle.

- Event status: This field indicates the current phase of the booking in the booking lifecycle: Scheduled, Rescheduled, Completed, Canceled, or No-show.
- **Cancel/reschedule reason:** This field adds additional information to the **Canceled** and **Rescheduled** lifecycle phases by providing the reason given by the Customer or Booking owner when a booking is canceled or rescheduled.

Salesforce provides a simple WYSIWYG editor (What You See Is What You Get) to customize the Event Page Layout. You can drag and drop new elements onto the page, or drag existing page elements around to change the layout to suit your preferences.

#### Requirements

To add the **Event status** and the **Cancel/reschedule reason** fields to the Activity Event layout in Salesforce, you will need:

- A Salesforce Administrator for your organization.
- An installed OnceHub connector for Salesforce.

#### Adding Custom fields to Activity Event Page Layout 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 1).

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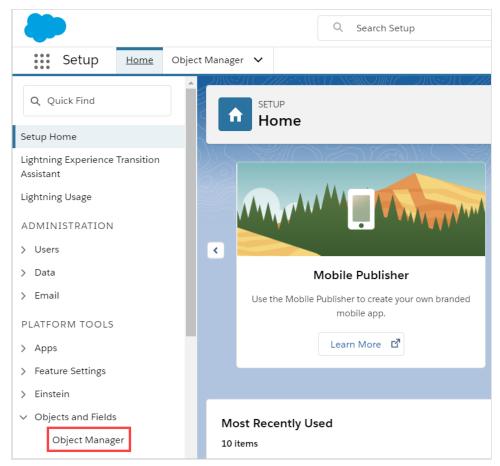


Figure 1: Object Manager in the Objects and Fields menu

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

| SETUP<br>Object Manager<br>51+ Items, Sorted by Label |                     |
|-------------------------------------------------------|---------------------|
|                                                       |                     |
| Duplicate Record Item                                 | DuplicateRecordItem |
| Duplicate Record Set                                  | DuplicateRecordSet  |
| Email Message                                         | EmailMessage        |
| Event                                                 | Event               |
| Image                                                 | Image               |
| Individual                                            | Individual          |
| Lead                                                  | Lead                |

Figure 2: Event in the Object Manager list

5. On the **Event** page, select **Page Layouts -> Event Layout** (Figure 3).

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| SETUP > OBJECT MANAGER<br>Event |                                                     |
|---------------------------------|-----------------------------------------------------|
| Details                         | Page Layouts<br>1 Items, Sorted by Page Layout Name |
| Fields & Relationships          | PAGE LAYOUT NAME                                    |
| Page Layouts                    | Event Layout                                        |
| Lightning Record Pages          |                                                     |
| Buttons, Links, and Actions     |                                                     |
| Compact Layouts                 |                                                     |

Figure 3: Event layout

6. Drag the **Section** element from the Editor menu and drop it below the **Calendar Details** section (Figure 4) to create a new section for the OnceHub fields that you want to add.

| ields                                                                       | Q Quick Find Fiel                                                                      | d Name            | ×                       |                           |                                                                |                          |
|-----------------------------------------------------------------------------|----------------------------------------------------------------------------------------|-------------------|-------------------------|---------------------------|----------------------------------------------------------------|--------------------------|
| Buttons                                                                     | → Section                                                                              | Attendees         | Email                   | Last Modified By          | Private                                                        | Show Time As             |
| uick Actions                                                                | +∎валк зрасе                                                                           | Cancel/reschedule | e End                   | Location                  | Related To                                                     | Start                    |
| Mobile & Lightning Actions<br>Expanded Lookups<br>Related Lists             | All-Day Event                                                                          | Created By        | Event status            | Name                      | Reminder Set                                                   | Subject                  |
|                                                                             | Assigned To                                                                            | Description       | Event Subtype           | Phone                     | Repeat                                                         | Туре                     |
|                                                                             | ord Type Printable View                                                                | Accept Decline Ca | ancel Edit Delete Delet | e Series Delete All Follo | wing Clone Create F                                            | Follow-Up Task Create Fo |
| Custom Butto                                                                |                                                                                        | Accept Decline Ca | ancel Edit Delete Delet | Delete All Follo          | wing Clone Create F                                            | Follow-Up Task Create Fo |
|                                                                             |                                                                                        | Accept Decline Ca | ancel Edit Delete Delet | e Series Delete All Follo | Clone Create F                                                 | Follow-Up Task Create Fo |
| Custom Butto                                                                | ns sible on edit only)                                                                 | Accept Decline C  | ancel Edit Delete Delet |                           |                                                                | -ollow-Up Task           |
| Calendar Details (Heade                                                     | r visible on edit only)                                                                | Accept Decline C  | ancel Edit Delete Delet | Loc                       | cation Sample Text                                             |                          |
| Custom Butto<br>Calendar Details (Heade<br>* Assigned To<br>* Subject       | ns<br>r visible on edit only)<br><u>Sample Text</u><br>Sample Text                     | Accept Decline C  | ancel Edit Delete Delet | Lor<br>* •                | cation Sample Text<br>Start 8/28/2019 7:4                      | 0 AM                     |
| Calendar Details (Heade<br>* • Assigned To<br>* • Subject<br>• Name         | r visible on edit only)<br>Sample Text<br>Sample Text<br>Sample Text                   | Accept Decline C  | ancel Edit Delete Delet | Lov<br>* •<br>* •         | cation Sample Text<br>Start 8/28/2019 7:4<br>End 8/28/2019 7:4 | 0 AM                     |
| Calendar Details (Heade<br>* • Assigned To<br>* • Subject<br>• Name<br>Anne | r visible on edit only)<br>Sample Text<br>Sample Text<br>Sample Text<br>1-415-555-1212 |                   | ancel Edit Delete Delet | Lor<br>* •                | cation Sample Text<br>Start 8/28/2019 7:4<br>End 8/28/2019 7:4 | 0 AM                     |
| Calendar Details (Heade<br>* • Assigned To<br>* • Subject<br>• Name         | r visible on edit only)<br>Sample Text<br>Sample Text<br>Sample Text                   |                   | ancel Edit Delete Delet | Lov<br>* •<br>* •         | cation Sample Text<br>Start 8/28/2019 7:4<br>End 8/28/2019 7:4 | 0 AM                     |

Figure 4: Add a new section

7. In the Section Properties pop-up, enter a Section Name and click OK (Figure 5).

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| Section Properties                      | ×                    |  |  |  |  |
|-----------------------------------------|----------------------|--|--|--|--|
| Section Name ScheduleOnce Data          |                      |  |  |  |  |
| Display Section Header On 🖉 Detail Page |                      |  |  |  |  |
| ✓ Edit Page                             |                      |  |  |  |  |
| Layout                                  | Tab-key Order        |  |  |  |  |
|                                         |                      |  |  |  |  |
| 1-Column                                | Eft-Right O Top-Down |  |  |  |  |
| OK Cancel                               |                      |  |  |  |  |

Figure 5: Section Properties pop-up

8. Click and drag the **Cancel/reschedule reason** element and drop it in the new section. Do the same with the **Event status** element (Figure 6).

| Save  Quick Save Preview                    | v As 🔻 Cancel   🛷 l                                                                                                                             | Jndo 🧥 Redo 📔 🖬 Lay | out Properties |                            |                                            |              |
|---------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|----------------|----------------------------|--------------------------------------------|--------------|
| Fields                                      | Quick Find Field                                                                                                                                | Name 🗙              |                |                            |                                            |              |
| Buttons                                     | →■ Section                                                                                                                                      | Attendees           | Email          | Last Modified By           | Private                                    | Show Time As |
| Quick Actions                               | *Blank Space                                                                                                                                    | Cancel/reschedule   | End            | Location                   | Related To                                 | Start        |
| Mobile & Lightning<br>Actions               | All-Day Event                                                                                                                                   | Created By          | Event status   | Name                       | Reminder Set                               | Subject      |
| Expanded Lookups                            | Assigned To                                                                                                                                     | Description         | Event Subtype  | Phone                      | Repeat                                     | Туре         |
| Related Lists                               |                                                                                                                                                 |                     |                |                            |                                            |              |
| ★ ● Subject<br>● Name<br>☑ Phone<br>☑ Email | isible on edit only)<br><u>Sample Text</u><br>Sample Text<br><u>Sample Text</u><br>1-475-555-1212<br>sarah.sample@company<br><u>Sample Text</u> | /.com               |                | Loca<br>* • S<br>All-Day E | Start 8/28/2019 7:44<br>End 8/28/2019 7:44 |              |

Figure 6: Add elements to new section

- 9. Click Save.
- 10. Go back to the Salesforce setup page in OnceHub.
- 11. After you refresh the page, the **Installation** tab will now be updated to show that you have completed **Step 3:** Add Custom fields to the Event page layout (Figure 7).

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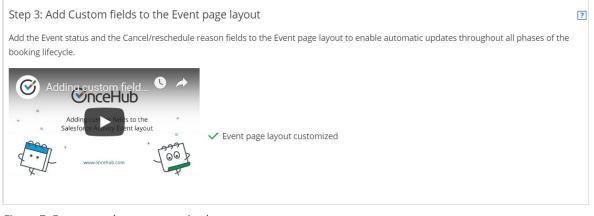


Figure 7: Event page layout customized



That's it! You've completed **Step 3** of the Installation phase. You can now click **Continue** to start mapping OnceHub fields to universally required Salesforce fields.