

# Using Salesforce Workflow Rules to update fields based on ScheduleOnce data

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The ScheduleOnce connector for Salesforce allows you to map any ScheduleOnce System field or Custom field to Salesforce fields. If you want to add an additional layer of Salesforce fields update logic, you can [create Salesforce Workflow Rules](#).

In this article, you'll learn how to create Workflow Rules based on ScheduleOnce data. We'll use a sample scenario in which you update the **Lead: Event Booked checkbox** and the **Lead: Lead Status picklist** when a Customer makes a booking or reschedules a booking.

## Requirements

To update Salesforce fields when the Customer schedules or reschedules an event, you will need:

- A [OnceHub Administrator](#).
- A Salesforce Administrator for your organization.
- [An active connection to your Salesforce API User](#).

Let's assume that the Lead Status field includes the **Working - Contacted** and the **Open - Not contacted** options. To create the Salesforce Workflow Rules, you'll need to follow these steps:

- Create an **Event Status** text Custom field for the Lead object and add it to the Lead Page Layout.
- Create an **Event Booked** checkbox Custom field (unchecked as default) for the Lead object and add it to the Lead Page Layout.
- Map the ScheduleOnce **Status** field to the Lead: Event Status field.
- Create the Workflow Rules.

## Creating an Event Status text Custom field

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).

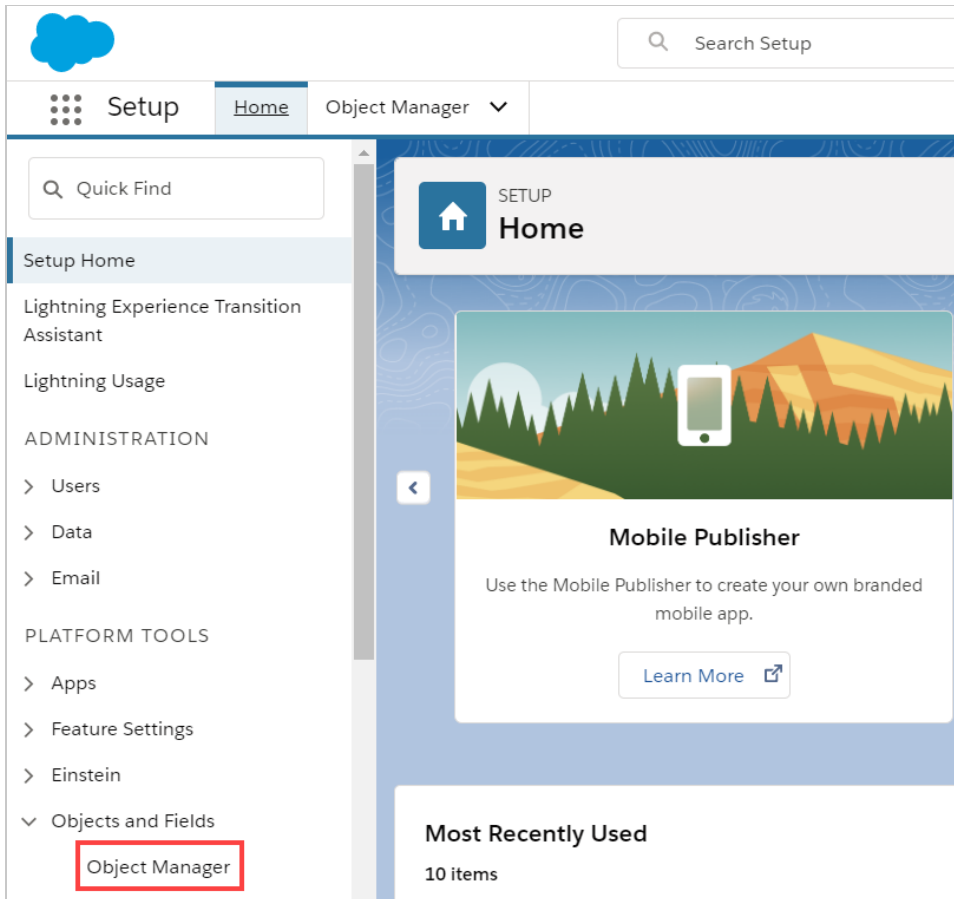


Figure 1: Object Manager in the Objects and Fields menu

- In the **Object Manager** list, select **Lead** (Figure 2).


 <b>SETUP Object Manager</b> 51+ Items, Sorted by Label	
Email message	Emailmessage
Event	Event
Image	Image
Individual	Individual
<b>Lead</b>	Lead
Macro	Macro
Messaging Session	MessagingSession

Figure 2: Lead in the Object Manager list

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

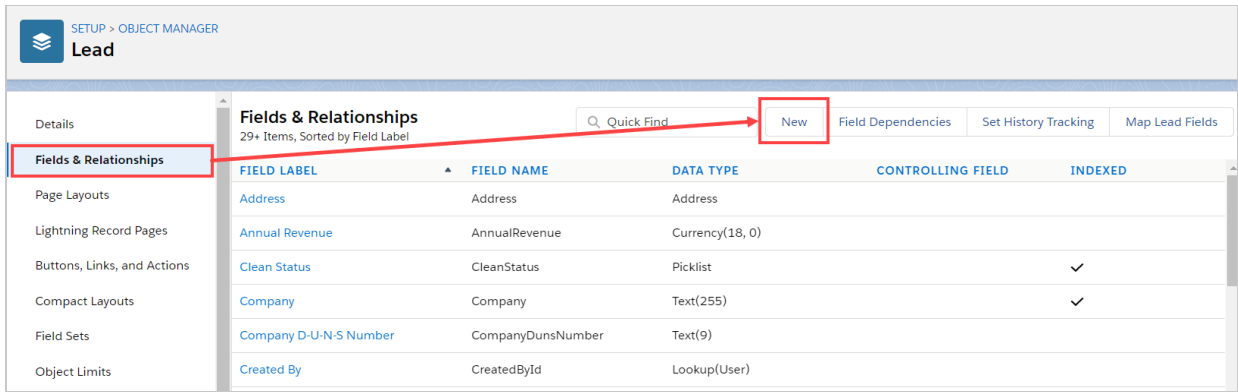


Figure 3: Fields & Relationships

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

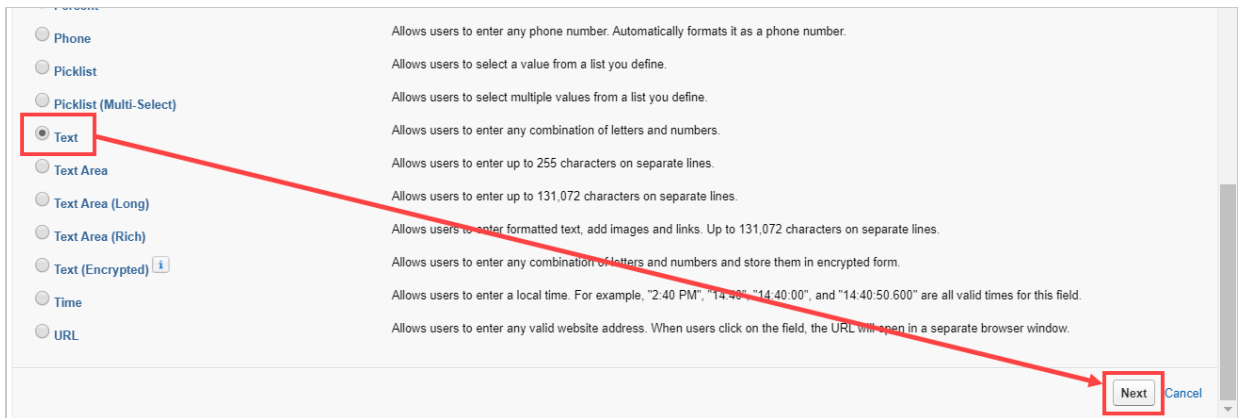


Figure 4: Text field

7. In **Step 2: Enter the details**, enter the following information (Figure 5). Add a description if required, then click **Next**.

- **Field label:** Event Status
- **Length:** 40
- **Field Name:** Event\_Status

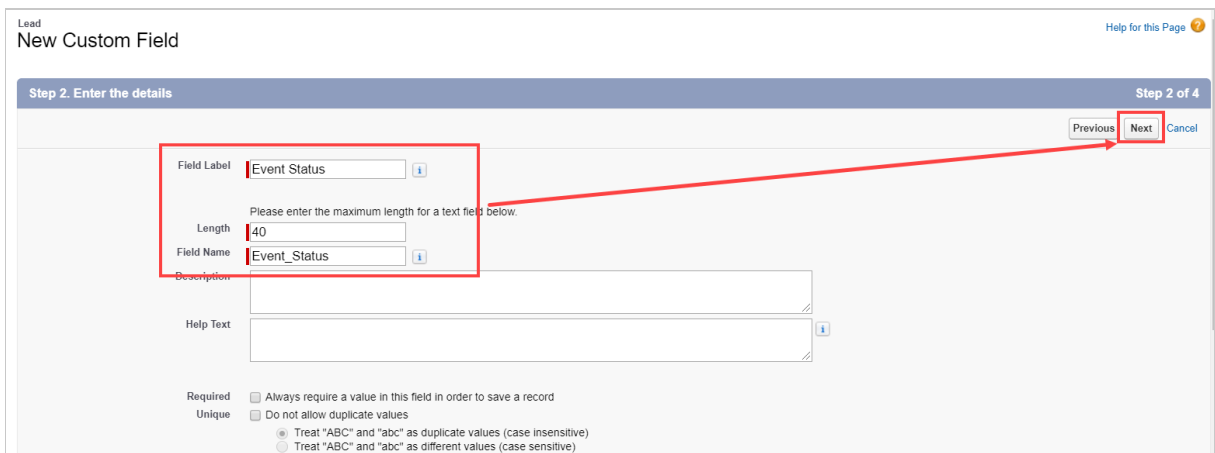


Figure 5: Step 2 Enter the details

8. In Step 3, click **Next**.

9. In Step 4, click **Save**.

Your **Event Status** text Custom field is now created and is added to the Lead Page Layout.

## Creating an Event Booked checkbox Custom field

1. Follow steps 1–5 from Creating an Event Status text Custom field above.
2. In the New Custom field pane, select **Checkbox** and click **Next** (Figure 6).

The screenshot shows the 'New Custom Field' wizard for a 'Lead' object. It is at 'Step 1. Choose the field type'. The 'Data Type' section lists several options: None Selected, Auto Number, Formula, Roll-Up Summary, Lookup Relationship, External Lookup Relationship, **Checkbox** (selected and highlighted with a red box), and Currency. A red arrow points from the 'Next' button in the top right corner to the 'Checkbox' option.

Figure 6: Checkbox

3. In **Step 2: Enter the details**, enter the following information (Figure 5). Add a description if required, then click **Next**.

- **Field label:** Event Booked
- **Default value:** Unchecked
- **Field Name:** Event\_Booked

The screenshot shows the 'New Custom Field' wizard at 'Step 2. Enter the details'. The 'Field Label' is 'Event Booked', 'Default Value' is 'Unchecked', and 'Field Name' is 'Event\_Booked'. A red box highlights these three fields. A red arrow points from the 'Next' button in the top right corner to the 'Field Label' field.

Figure 7: Step 2 Enter the details

4. In Step 3, click **Next**.
5. In Step 4, click **Save**.

Your **Event Booked** checkbox Custom field is now created and is added to the Lead Page Layout.

## Mapping the ScheduleOnce Status field to the Lead Event Status field

1. In OnceHub, go to **Setup -> ScheduleOnce setup**.
2. In the left hand sidebar, select **Integrations**.
3. On the Integrations page, select **CRM**.
4. In the Salesforce box, click **Setup**.
5. In the **Salesforce connector setup**, go to the **Field mapping** tab.
6. At the bottom left of the table, click **Add ScheduleOnce fields** (Figure 8). The ScheduleOnce field list includes System fields and Custom fields organized by categories.

<input checked="" type="checkbox"/>	State	↔	Contact ▼	Mailing State/Province (MailingState) ▼
<input checked="" type="checkbox"/>	Country	↔	Lead ▼	Country (Country) ▼
<input checked="" type="checkbox"/>	Country	↔	Contact ▼	Mailing Country (MailingCountry) ▼
<input checked="" type="checkbox"/>	Subject/Event type	→	Case ▼	Subject (Subject) ▼
<div style="border: 1px solid red; padding: 5px; display: inline-block; border-radius: 10px;">Add ScheduleOnce fields</div>				

Figure 8: Add ScheduleOnce fields

7. The **Add ScheduleOnce fields** pop-up will open
8. Use the **Filter by** drop-down menu to filter by **Booking data**.
9. Check the **Status** checkbox.
10. Click **Add fields**.

**Note:**

If you want to make the Workflow Rule specific to a [Booking page](#) or [Event type](#), you can also map the ScheduleOnce Booking page label or Event type name to specific Lead Custom fields. The Booking page label or Event type name can be used to refine the Salesforce Workflow rule that is triggered when a booking is made.

11. For the newly added **Status** field, select **Lead** from the first drop-down menu and select **Event Status (Event\_Status\_\_c)** from the second drop-down menu (Figure 9).

<input checked="" type="checkbox"/>	State	↔	Contact ▼	Mailing State/Province (MailingState) ▼
<input checked="" type="checkbox"/>	Country	↔	Lead ▼	Country (Country) ▼
<input checked="" type="checkbox"/>	Country	↔	Contact ▼	Mailing Country (MailingCountry) ▼
<input checked="" type="checkbox"/>	Subject/Event type	→	Case ▼	Subject (Subject) ▼
<input type="checkbox"/>	Status	→	Lead ▼	Event Status (Event_Status__c) ▼
<div style="border: 1px solid red; padding: 5px; display: inline-block; border-radius: 10px;">Add ScheduleOnce fields</div>				

Figure 9: Map the Status field

12. Click the **Save** button or **Save and Continue** if you have completed mapping all fields.

## Creating Workflow Rules in Salesforce

You can automate the update of many field records using workflow rules. We will create two workflow rules:

- **Workflow rule 1** checks the **Event Booked checkbox** and sets the Lead Status to **Working - Contacted** when the event is scheduled or rescheduled by Customer
- **Workflow rule 2** unchecks the **Event Booked checkbox** and sets the Lead Status to **Open - Not Contacted** when the event is not scheduled or rescheduled by Customer

To create Workflow rules, follow the steps below:

1. Sign in to Salesforce.
2. In your Salesforce **Setup** page, go to **Platform tools -> Process Automation**.
3. Select **Workflow Rules** (Figure 10).

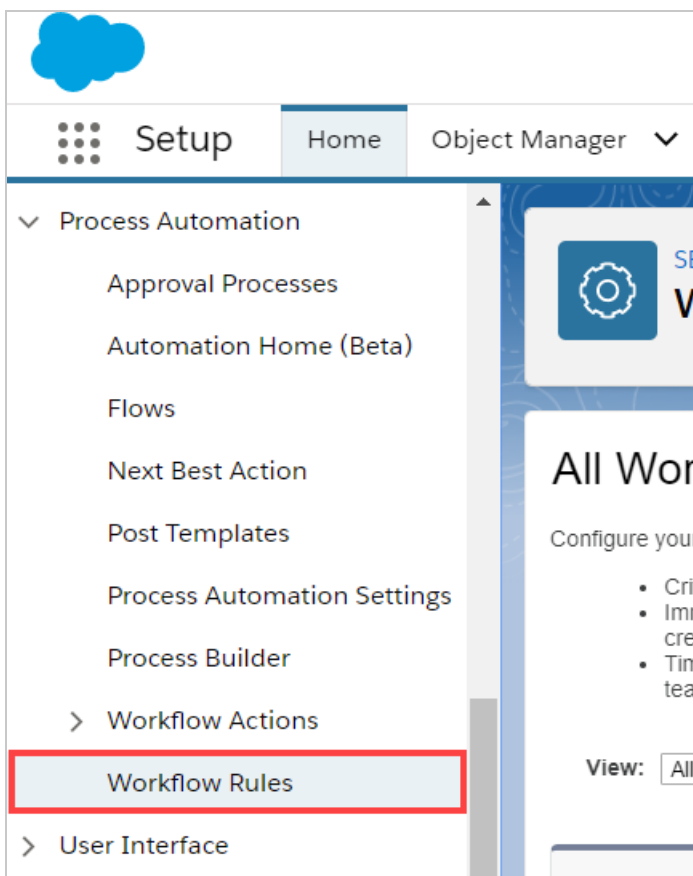


Figure 10: Workflow Rules

4. Click **New Rule**.
5. From the **Object** drop-down, select the object to which the rule will apply. In our example, select **Lead**.

## Creating Workflow Rule 1

1. On the **New Workflow Rule** page in Salesforce, fill out the following information and click **Save & Next** (Figure 11).

- **Rule Name:** Update Lead fields when event is scheduled or rescheduled by Customer
- **Rule description:** The Rule checks the **Event Booked** checkbox and sets the Lead Status to **Working - Contacted** when the event is scheduled or rescheduled by Customer.
- **Evaluate the rule when a record is:** created, and every time it's edited
- **Rule Criteria:** Run this rule if the criteria are met:
  - **Lead: Event status** equals **Scheduled**
  - **Lead: Event status** equals **Rescheduled by Customer**
  - **Advance filter logic:** 1 OR 2

The screenshot shows the 'Edit Rule' interface in Salesforce. The 'Object' is set to 'Lead'. The 'Rule Name' is 'Update Lead fields when event is scheduled or rescheduled by Customer'. The 'Description' is 'The Rule checks the Event Booked checkbox and sets the Lead Status to Working - Contacted when the event is scheduled or rescheduled by Customer.' Under 'Evaluation Criteria', the option 'created, and every time it's edited' is selected. A warning message states: 'You cannot add time-dependent workflow actions with this option.' Under 'Rule Criteria', the criteria are set to 'criteria are met'. The criteria table is as follows:

Field	Operator	Value
1. Lead: Event Status	equals	Scheduled
2. Lead: Event Status	equals	Rescheduled by Customer
3. --None--	--None--	
4. --None--	--None--	
5. --None--	--None--	

Below the table, the 'Filter Logic' is set to '1 OR 2'. There are links for 'Add Row', 'Remove Row', and 'Clear Filter Logic'.

Figure 11: Update Lead fields when event is scheduled or rescheduled by Customer

2. On **Step 3: Specify Workflow Actions**, click **Add Workflow Action**.  
 3. Select **New Field Update** and add the following information (Figure 12):

- **Name:** Check the **Event Booked** checkbox automatically
- **Unique name:** Check\_checkbox
- **Field to update:** Event Booked
- **Re-evaluate Workflow Rules after Field Change:** Checked
- **Checkbox Options:** True

**Field Update Edit**

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**Identification**

<b>Name</b>	<input type="text" value="Check the Event Booked c"/>
<b>Unique Name</b>	<input type="text" value="Check_checkbox"/> <input type="button" value="i"/>
<b>Description</b>	<input style="height: 30px;" type="text"/>
<b>Object</b>	Lead
<b>Field to Update</b>	<input type="text" value="Event Booked"/> ▼
<b>Field Data Type</b>	Checkbox
<b>Re-evaluate Workflow Rules after Field Change</b>	<input checked="" type="checkbox"/> <input type="button" value="i"/>

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**Specify New Field Value**

**Checkbox Options**

True  
 False

Figure 12: Automatically check the Event Booked checkbox

4. Click **Save & New**.
5. Add the following information (Figure 13):
  - **Name:** Update the Lead Status picklist to Working - Contacted
  - **Unique name:** Update\_the\_Lead\_Status\_picklist
  - **Field to update:** Lead Status
  - **Re-evaluate Workflow Rules after Field Change:** Checked
  - **Picklist Option > A specific value:** Working – Contacted



**Field Update Edit**

Save Save & New Cancel

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**Identification**

<b>Name</b>	<input type="text" value="Update the Lead Status pic"/>
<b>Unique Name</b>	<input type="text" value="Update_the_Lead_Status_"/> <span style="font-size: 0.8em;">i</span>
<b>Description</b>	<div style="border: 1px solid #ccc; height: 20px;"></div>
<b>Object</b>	Lead
<b>Field to Update</b>	<input style="width: 100%;" type="text" value="Lead Status"/>
<b>Field Data Type</b>	Picklist
<b>Re-evaluate Workflow Rules after Field Change</b>	<input checked="" type="checkbox"/> <span style="font-size: 0.8em;">i</span>

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**Specify New Field Value**

**Picklist Options**

The value above the current one  
 The value below the current one  
 A specific value

Save Save & New Cancel

Figure 13: Update the Lead Status picklist to Working - Contacted

6. Click **Save**.
7. Click **Done**.
8. On the **Workflow Rules** page, click **Activate** to activate the rule.

### Creating Workflow Rule 2

1. On the **New Workflow Rule page** in Salesforce, fill out the following information and click **Save & Next**.
  - **Rule Name:** Uncheck the **Event Booked** checkbox automatically when a booking is not scheduled or rescheduled by Customer.
  - **Rule description:** The **Event Booked** checkbox will be automatically unchecked on the Lead Page Layout when an event is not scheduled or rescheduled by the Customer for that record.
  - **Evaluate the rule when a record is:** created, and every time it's edited
  - **Rule Criteria: Run this rule if the following criteria are met:**
    - **Lead: Event status** not equal to **Scheduled**
    - **Lead: Event status** not equal to **Rescheduled by Customer**
    - **Advance filter logic:** 1 OR 2
2. On **Step 3: Specify Workflow Actions**, click **Add Workflow Action**.
3. Select **New Field Update**, add the following information:

- **Name:** Uncheck the **Event Booked** checkbox automatically when a booking is made.
  - **Unique name:** Uncheck\_the\_Event\_Booked\_checkbox
  - **Field to update:** Event Booked
  - **Re-evaluate Workflow Rules after Field Change:** Checked
  - **Checkbox Options:** False
4. Click **Save & New**.
  5. Add the following information:
    - **Name:** Change the Lead Status picklist to Open - Not Contacted
    - **Unique name:** Change\_the\_Lead\_Status\_picklist
    - **Field to update:** Lead Status
    - **Re-evaluate Workflow Rules after Field Change:** Checked
    - **Picklist Option > A specific value:** Open - Not contacted
  6. Click **Save**.
  7. Click **Done**.
  8. On the **Workflow Rules** page, click **Activate** to activate the rule.

You're all set! You can now create a test booking in ScheduleOnce to view how the Workflow Rules update your records when a booking is made.

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