

Using Salesforce Workflow Rules to update fields based on OnceHub data

Last Modified on Apr 5, 2023

The OnceHub connector for Salesforce allows you to map any OnceHub 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 OnceHub 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.

In this article:

- [Requirements](#)
- [Creating an Event Status text Custom field](#)
- [Creating an Event Booked checkbox Custom field](#)
- [Mapping the OnceHub Status field to the Lead Event Status field](#)
- [Creating Workflow Rules in Salesforce](#)
 - [Creating Workflow Rule 1](#)
 - [Creating Workflow Rule 2](#)

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 OnceHub **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).

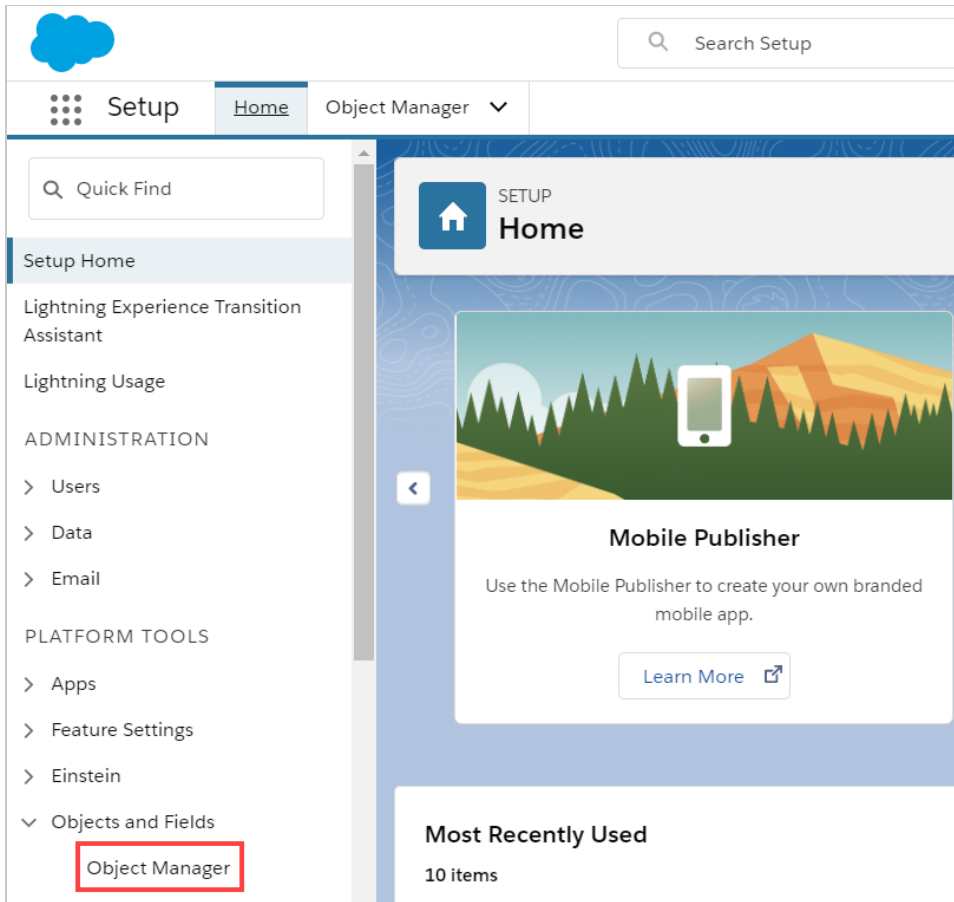


Figure 1: Object Manager in the Objects and Fields menu

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

SETUP Object Manager	
51+ Items, Sorted by Label	
Email Message	Emailmessage
Event	Event
Image	Image
Individual	Individual
Lead	Lead
Macro	Macro
Messaging Session	MessagingSession

Figure 2: Lead in the Object Manager list

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

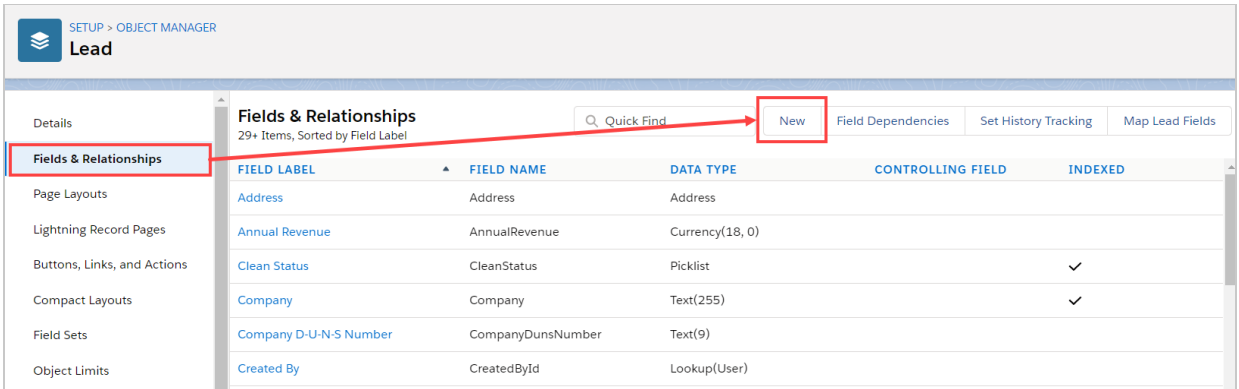


Figure 3: Fields & Relationships

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

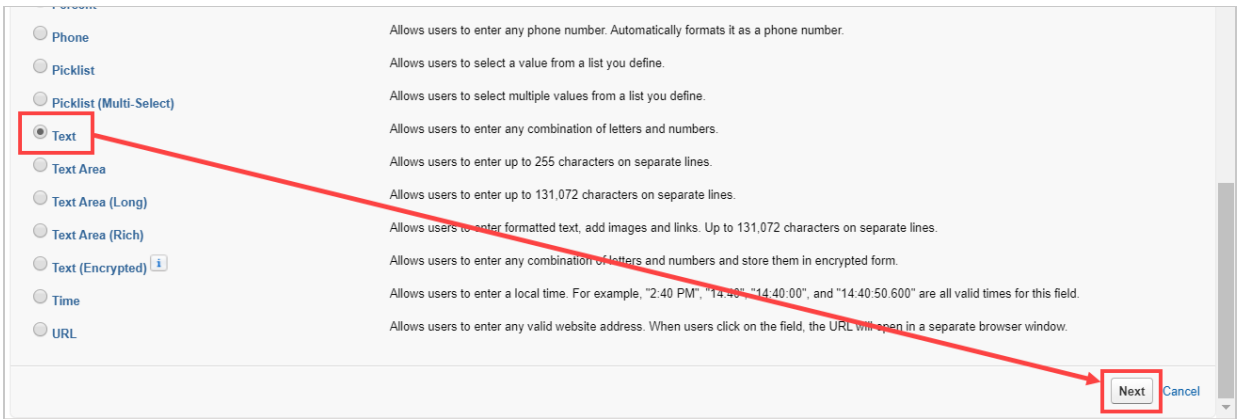


Figure 4: Text field

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

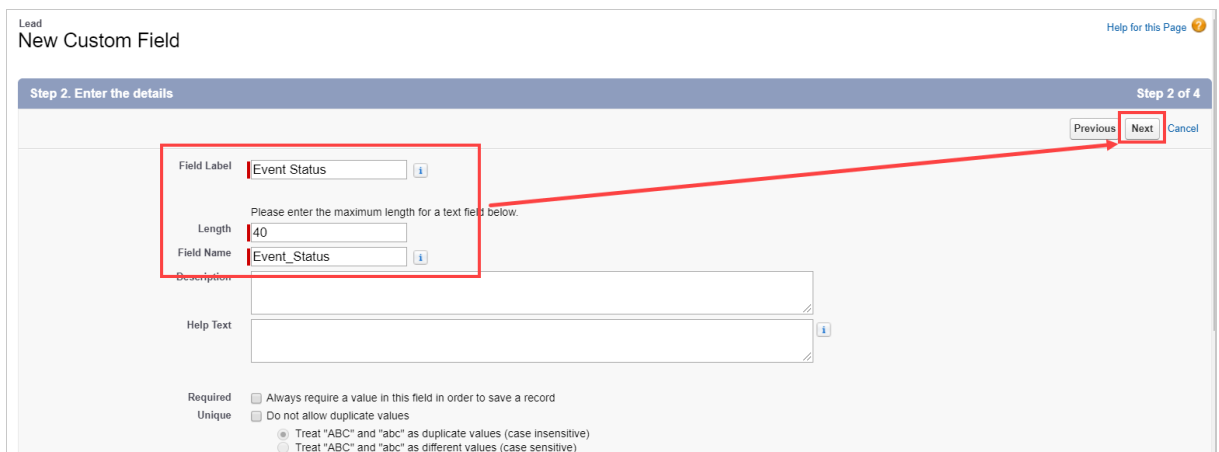


Figure 5: Step 2 Enter the details

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' dialog in Salesforce. The title is 'Lead New Custom Field'. The step indicator shows 'Step 1 of 4'. The main heading is 'Step 1. Choose the field type'. Below this, there is a prompt: 'Specify the type of information that the custom field will contain.' Underneath is a 'Data Type' section with several radio button options: 'None Selected', 'Auto Number', 'Formula', 'Roll-Up Summary', 'Lookup Relationship', 'External Lookup Relationship', 'Checkbox', and 'Currency'. The 'Checkbox' option is selected and highlighted with a red box. To the right of each option is a brief description. In the top right corner, there are 'Next' and 'Cancel' buttons. A red arrow points from the 'Next' button in the top right to the 'Next' button in the bottom right.

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' dialog in Salesforce, Step 2: Enter the details. The title is 'Lead New Custom Field'. The step indicator shows 'Step 2 of 4'. The main heading is 'Step 2. Enter the details'. Below this, there are several input fields: 'Field Label' (text input with 'Event Booked'), 'Default Value' (radio buttons for 'Checked' and 'Unchecked', with 'Unchecked' selected), 'Field Name' (text input with 'Event_Booked'), 'Description' (text area), and 'Help Text' (text area). In the top right corner, there are 'Previous', 'Next', and 'Cancel' buttons. A red box highlights the 'Field Label', 'Default Value', and 'Field Name' fields. A red arrow points from the 'Next' button in the top right to the 'Next' button in the bottom right.

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 OnceHub Status field to the Lead Event Status field

1. Select your profile picture or initials in the top right-hand corner → **Profile settings** → **CRM**.
2. In the Salesforce box, click **Setup**.
3. In the **Salesforce connector setup**, go to the **Field mapping** tab.
4. At the bottom left of the table, click **Add OnceHub fields** (Figure 8). The OnceHub field list includes System fields and Custom fields organized by categories.
5. The **Add OnceHub fields** pop-up will open
6. Use the **Filter by** drop-down menu to filter by **Booking data**.
7. Check the **Status** checkbox.
8. 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 OnceHub 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.

9. 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 8).

<input checked="" type="checkbox"/>	State	↔	Contact	Mailing State/Province (MailingState__c)
<input checked="" type="checkbox"/>	Country	↔	Lead	Country (Country)
<input checked="" type="checkbox"/>	Country	↔	Contact	Mailing Country (MailingCountry__c)
<input checked="" type="checkbox"/>	Subject/Event type	→	Case	Subject (Subject)
<input type="checkbox"/>	Status	→	Lead	Event Status (Event_Status__c)

[Add ScheduleOnce fields](#)

Figure 8: Map the Status field

10. 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).

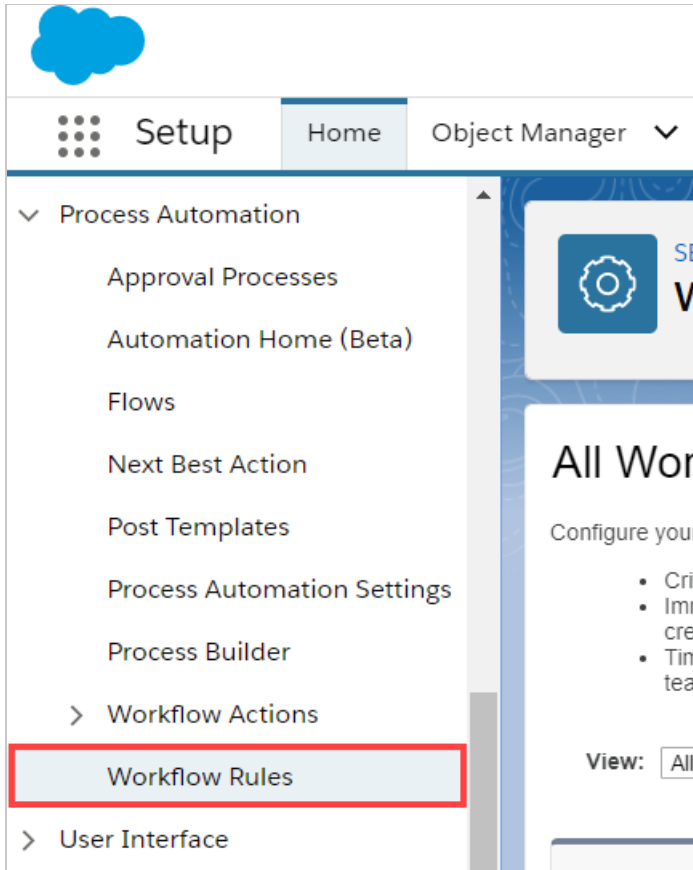


Figure 9: Workflow Rules

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

Edit Rule

Object: Lead
 Rule Name: Update Lead fields when eve...
 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.

Evaluation Criteria

Evaluate the rule when a record is:

- created
- created, and every time it's edited
- created, and any time it's edited to subsequently meet criteria [i](#)

You cannot add time-dependent workflow actions with this option.

How do I choose?

Rule Criteria

Run this rule if the **criteria are met** :

	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--	

[Add Row](#) [Remove Row](#)

[Clear Filter Logic](#)
 Filter Logic: 1 OR 2 [Tips ?](#)

Figure 10: 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

Save
Save & New
Cancel

Identification

Name

Unique Name i

Description

Object

Field to Update ▼

Field Data Type

Re-evaluate Workflow Rules after Field Change i

Specify New Field Value

Checkbox Options

True

False

Save
Save & New
Cancel

Figure 11: 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

Identification

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

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 12: 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 OnceHub to view how the Workflow Rules update your records when a booking is made.
