OnceHub Support

Salesforce record creation, update, and assignment rules

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

In this article, you'll learn about how to define the way Leads, Contacts, and Cases will be created, updated, and assigned in Salesforce when a booking is made.

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Requirements

To set up the OnceHub connector for Salesforce, you must:

- Be a OnceHub Administrator.
- Have an active connection to your Salesforce API user.

You do not need an assigned product license to install and update Salesforce account settings. Learn more

Accessing the Salesforce connector setup page

Select your profile picture or initials in the top right-hand corner → **Profile settings** → **CRM**. Then, click the **Setup** button in the Salesforce box (Figure 1).
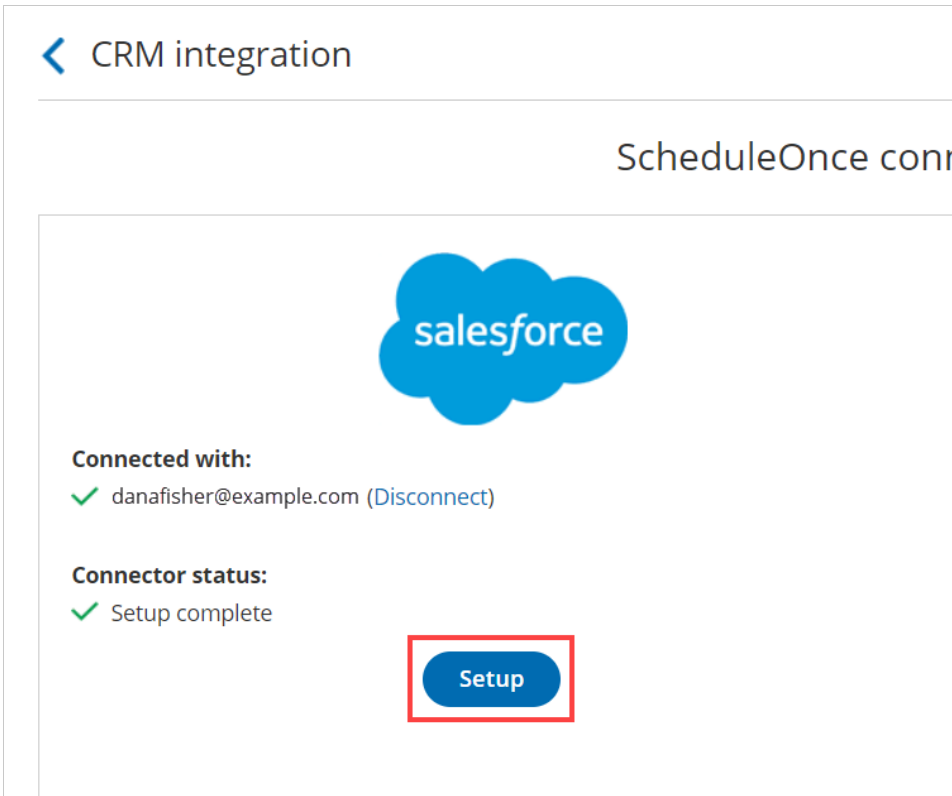
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CRM integration

ScheduleOnce conn

Connected with:

✓ danafisher@example.com (Disconnect)

Connector status:

✓ Setup complete

Setup

Figure 1: Salesforce setup

On the **Salesforce connector setup** page, select **Creation rules** (Figure 2).

Salesforce connector setup

< Exit setup   Salesforce connector setup

Record creation, update, and assignment rules   Exit setup

When a booking is made, a Salesforce Activity is created and related to the Salesforce Record. The Salesforce Activity is automatically updated at each stage of the booking lifecycle: Scheduled, Rescheduled, Completed, Canceled, and No-show.

Select the rules for your ScheduleOnce account:

1 ✓ API connection
2 ✓ Installation
3 ✓ Field validation
4 ✓ Field mapping
5 ✓ Creation rules >

		Record creation and update	Record assignment
Lead			
Existing Lead	ⓘ	● Override Salesforce data with ScheduleOnce data ○ Keep existing Salesforce data. Only update empty Salesforce fields.	● Keep existing Salesforce ownership ○ Assign to ScheduleOnce Booking owner ○ Assign using Salesforce active assignment rules
New Lead	ⓘ	✓ Create a Lead record based on ScheduleOnce data	● Assign to ScheduleOnce Booking owner ○ Assign using Salesforce active assignment rules
Contact			
Existing Contact	ⓘ	● Override Salesforce data with ScheduleOnce data ○ Keep existing Salesforce data. Only update empty	● Keep existing Salesforce ownership ○ Assign to ScheduleOnce Booking owner

Figure 2: Creation rules

Lead records

	Record creation and update	Record assignment
Lead		
Existing Lead ⓘ	⦿ Override Salesforce data with ScheduleOnce data ◯ Keep existing Salesforce data. Only update empty Salesforce fields.	⦿ Keep existing Salesforce ownership ◯ Assign to ScheduleOnce Booking owner ◯ Assign using Salesforce active assignment rules
New Lead ⓘ	✓ Create a Lead record based on ScheduleOnce data	⦿ Assign to ScheduleOnce Booking owner ◯ Assign using Salesforce active assignment rules

Figure 3: Lead records

Existing Leads

In this case, the Customer making the booking exists in Salesforce and is recognized based on their Lead Record ID or their email address.

- If you're scheduling with existing Salesforce Leads only, you should use our Personalized links (Salesforce ID) in your Salesforce email templates and Salesforce emails to automatically recognize the Lead based on their Salesforce Lead record ID. This allows you to prepopulate the Booking form step with Salesforce data, or skip it altogether.
- If you're not sure that the Customer making the booking already exists in Salesforce, you should use the General links to recognize the Customer based on their email address. When the Lead or Contact record is identified, it will be updated based on the option you have chosen in the Record creation and update rules.

When a booking is made, the options provided allow you to choose between:

- Overriding the existing Salesforce data with OnceHub data.
- Keeping the existing Salesforce data and only update empty fields.

You can also decide whether to keep the Salesforce ownership, assign the record to the OnceHub Booking page owner, or assign the record using Salesforce active assignment rules.

New Leads

In this case, the Customer making the booking does not exist in Salesforce. For this reason, you should use General links when making bookings with prospects that may or may not exist in your Salesforce database.

When a booking is made, OnceHub creates a new Lead record in Salesforce and adds a new Salesforce Activity Event. You can decide whether to assign the Lead record to the OnceHub Booking page Owner or assign the Lead record using Salesforce active assignment rules.

Contact records

Contact			
Existing Contact	ⓘ	⦿ Override Salesforce data with ScheduleOnce data ◯ Keep existing Salesforce data. Only update empty Salesforce fields.	⦿ Keep existing Salesforce ownership ◯ Assign to ScheduleOnce Booking owner
New Contact	ⓘ	✓ Create a Contact record based on ScheduleOnce data	✓ Assign to ScheduleOnce Booking owner

Figure 4: Contact records

Existing Contacts

In this case, the Customer making the booking exists in Salesforce and is recognized based on the email address or Contact Record ID.

- If you're scheduling with existing Salesforce Contacts only, you should use our Personalized links (Salesforce ID) in your Salesforce email templates and Salesforce emails to automatically recognize the Contact based on their Salesforce Contact record ID. This allows you to prepopulate the Booking form step with Salesforce data, or skip it altogether.
- If you're not sure that the Customer making the booking already exists in Salesforce, you should use the General links to recognize the Customer based on their email address. When the Lead or Contact record is identified, it will be updated based on the option you have chosen in the Record creation and update step.

When a booking is made, the options provided allow you to choose between:

- Overriding the existing Salesforce data with OnceHub data.
- Keeping the existing Salesforce data and only update empty fields.

You can also decide whether to keep the Salesforce ownership or assign the record to the OnceHub Booking page owner.

New Contacts

In this case, the Customer making the booking does not exist in Salesforce and the Account may or may not exist in Salesforce. For this reason, you should use General links when making bookings with prospects that may or may not exist in your Salesforce database.

When a booking is made, OnceHub creates a new Contact record in Salesforce, assigns the Contact to the OnceHub Booking page Owner, and adds a new Salesforce Activity Event.

> ⓘ **Note:**
>
> When an Account does not exist in Salesforce, it is always created based on OnceHub data.

Case records

Case			
Existing Case ⓘ	⦿ Override Salesforce data with ScheduleOnce data ◯ Keep existing Salesforce data. Only update empty Salesforce fields.	⦿ Keep existing Salesforce ownership ◯ Assign to ScheduleOnce Booking owner ◯ Assign using Salesforce active assignment rules	
New Case ⓘ	✓ Create a Case record based on ScheduleOnce data	⦿ Assign to ScheduleOnce Booking owner ◯ Assign using Salesforce active assignment rules	

Figure 5: Case records

Existing Cases

In this case, the Case exists in Salesforce and is recognized based on the Salesforce Case Record ID. You should use our Personalized links (Salesforce ID) in your Salesforce email templates and Salesforce emails to automatically recognize the Case based on the Salesforce Case Record ID. This allows you to prepopulate the booking form step with Salesforce data, or skip it altogether.

When a booking is made, the options provided allow you to choose between:

- Overriding the existing Salesforce data with OnceHub data.
- Keeping the existing Salesforce data and only update empty fields.

You can also decide whether to keep the Salesforce ownership, assign the record to the OnceHub Booking page owner, or assign the record using Salesforce active assignment rules.

> ⓘ **Note:**
>
> The Contact is always updated based on the Record creation and update rules.

New Cases

In this case, the Case doesn't exist in Salesforce and the Customer making the booking may or may not exist in Salesforce. For this reason, you should use General links when making bookings with prospects that may or may not exist in your Salesforce database.

When a booking is made, OnceHub creates a new Case record in Salesforce and adds a new Salesforce Event upon booking. You can decide whether to assign the Case record to the OnceHub Booking page Owner or assign the Case record using Salesforce active assignment rules.

> ⓘ **Note:**
>
> The Contact is always updated based on the Record creation and update rules.