

The ScheduleOnce connector for Infusionsoft

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The ScheduleOnce connector for Infusionsoft makes ScheduleOnce an integral part of your Infusionsoft solution, integrating your bookings with your Infusionsoft account.

You do not need an assigned product license to install and update Infusionsoft account settings, though you do need to be an Administrator. [Learn more](#)



Connecting the ScheduleOnce Connector for Infusionsoft

Before you can set up and use the Infusionsoft integration with your bookings, you must first [connect your ScheduleOnce account to Infusionsoft](#). You can do this by going to **Setup -> ScheduleOnce setup** and opening the lefthand sidebar. Select **Integrations -> CRM**.

Once a User with Administrator privileges has connected, ScheduleOnce Members simply need to sign in to their ScheduleOnce accounts. They can do this by going to **Setup -> ScheduleOnce setup** and opening the lefthand sidebar. Select **Integrations -> CRM** and click Connect. This will allow all bookings made on Booking pages owned by these Users to be passed over to Infusionsoft.

Configuring the ScheduleOnce Connector for Infusionsoft

After connecting (as an Administrator), you can configure your [creation, update, and assignment rules](#), determining how contacts will be created, updated, and assigned in Infusionsoft when a booking is made.

Whenever a booking is made, Contacts and Appointments can be automatically classified and prioritized in Infusionsoft. The Infusionsoft Contact is automatically created with a Lead source and all relevant classifications. This enables automatic triggering of follow-up sequences and automated campaigns, making ScheduleOnce an extension of Infusionsoft's powerful marketing automation features.

Mapping fields from ScheduleOnce to Infusionsoft

All ScheduleOnce standard fields are [mapped to Infusionsoft fields](#) by default and we recommend you maintain these default field mappings. You can also map custom fields from ScheduleOnce to the matching field of your choice in Infusionsoft.

Please note: There are some restrictions on the type of data which can be passed between ScheduleOnce and Infusionsoft. See [Supported and non-supported field types for full details](#).

Applying Infusionsoft tags to ScheduleOnce bookings

When a booking is made, [Infusionsoft tags are automatically added](#) to Contact records. Tags help you divide your contact database into very specific lists so you can enable automatic triggering of follow-up sequences and automated campaigns.

When a booking is scheduled, rescheduled or canceled, [booking lifecycle tags](#) are automatically added to Contact records. These tags are updated at each stage of the booking lifecycle. Tags indicate if a booking has been scheduled, rescheduled, canceled, completed, or if the customer was a no-show. Additional levels of detail are available for scheduled and rescheduled bookings, with tags that indicate if a booking has been reassigned by a User. Canceled bookings include information about who canceled the booking, as well as if a request to reschedule was submitted.

Along with the ScheduleOnce lifecycle tags, you can create Event type-specific tags in Infusionsoft and assign them to the relevant Booking page, Event, or Master page in ScheduleOnce. Whenever a booking is made, the relevant tag(s) will be applied.

Embedding your Infusionsoft tracking code

You can easily [embed your Infusionsoft tracking code](#) within your ScheduleOnce booking forms. This helps you optimize your Booking forms by capturing visitor activity and making it available for analysis in Infusionsoft.

Using the ScheduleOnce Connector for Infusionsoft

When a booking is made, an Infusionsoft Contact record is created or updated and an Appointment is added automatically to the Contact record in Infusionsoft.

Using our [Personalized links \(Infusionsoft ID\)](#) in your Infusionsoft email and broadcasts, you can automatically recognize the Contact based on their Infusionsoft Record ID. This allows you to pre-populate or even skip the Booking form.

When scheduling with existing Infusionsoft Contacts, you can either use our [Personalized links \(Infusionsoft ID\)](#) in your [Infusionsoft email and broadcasts](#), or [use the Infusionsoft Record ID to identify Customers during the booking process](#).