OnceHub Support

Tips for integrating ScheduleOnce with CRM apps

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Note:

When integrating with CRM apps, it's best to use one of our specific triggers.

This article includes tips for integrating ScheduleOnce with CRM apps using Zapier as an integration platform.

A note on terminology

In this article, we will mention some CRM-specific terms including: task, event, activity, meeting and appointment. Although some CRM apps have their terminology, these are the most commonly used terms in the industry.

Supported use cases

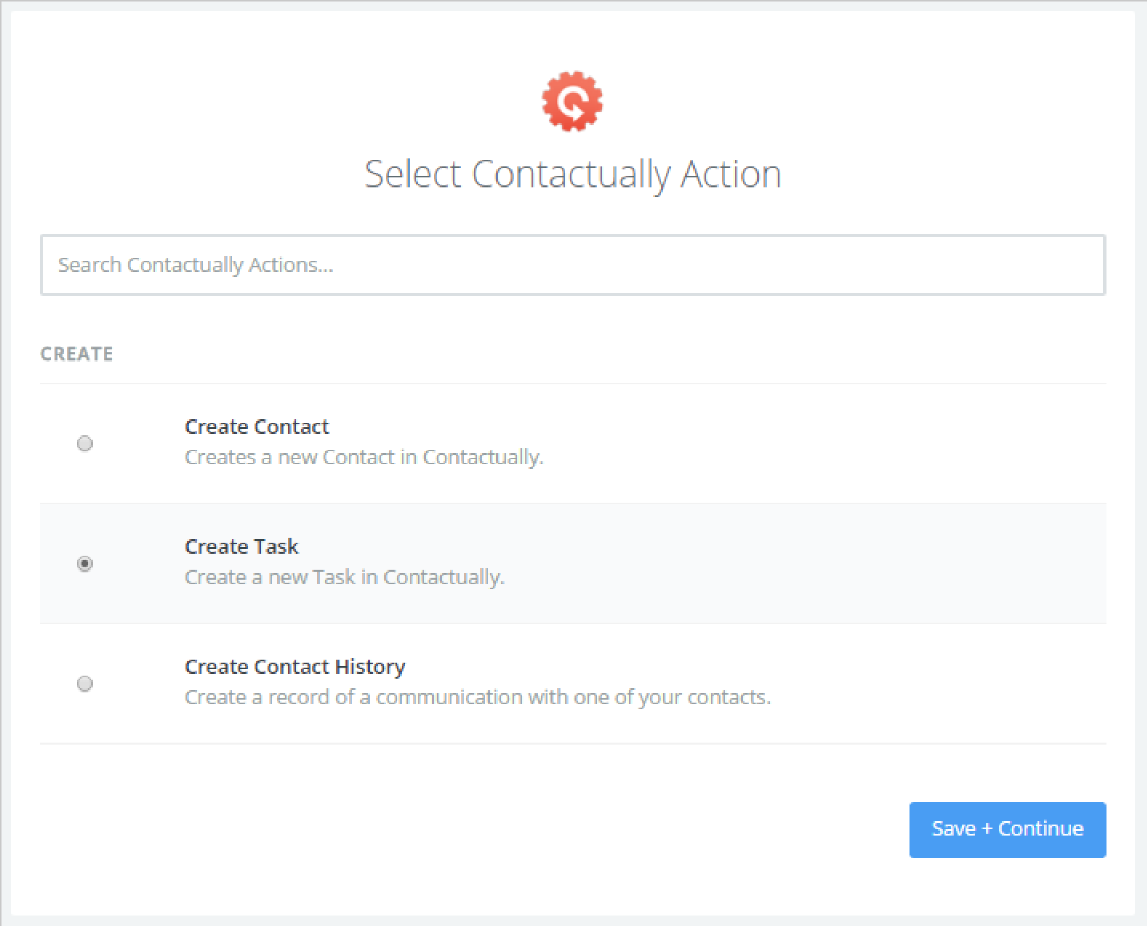
ScheduleOnce CRM integration using Zapier supports the following use cases:

1. When a booking is made in ScheduleOnce, a new lead or contact record can be created in the CRM
2. When a booking is made in ScheduleOnce, a new CRM task can be created
3. When a booking is rescheduled in ScheduleOnce, a new CRM task can be created

Limitations

The following is a list of some integration limitations using Zapier. It's important to understand how these affect your business processes:

1. **3rd party apps on Zapier only provide a 'create' action.** The most common use case these apps support is the creation of a new Contact, Task, Appointment etc. Although more and more apps are providing an 'update' functionality, currently, very few do. Please make sure to read the 3rd party app Zapier documentation carefully to determine how you can perform updates. You should review your business processes carefully so your Zaps do not create many duplicate records in your system. Contact us if you need some help determining how to set up Zapier correctly.
2. **You cannot link entities in the target app.** E.g. when creating a new CRM task, it is not possible to link it to an existing lead, contact, deal, or opportunity. However, you can use the composite field from ScheduleOnce to store customer and booking data as part of the CRM task.
3. **Not all CRM apps support the creation of tasks.** Some CRMs don't support task creation via Zapier. When creating a Zap, select the CRM with which you want to integrate and see if the Create Task action appears in the Actions list.



Field mapping tips

When passing fields from ScheduleOnce through Zapier and into your CRM app, some information might not pass through correctly as a result of the differences in field validations and constraints.

In order to make sure the information does pass through correctly to your email marketing app, you sometimes need to add custom text in the field mapping setting in Zapier. Below is an example of a specific ScheduleOnce field that might need a prefix text in the field mapping setting.

- **ScheduleOnce Customer mobile phone field.** When mapping this field to a field in your email marketing app, ScheduleOnce does not send the + prefix (indicating an international number). If you want this prefix to be created, you can add it as static text before the field.

- **CRM task description.** When there is no direct match between a ScheduleOnce booking field and a CRM task field, you may be able to map the field to a 'custom field'. If custom fields are not supported by your CRM or by its Zapier integration, you can map multiple ScheduleOnce fields to a CRM task description field. To make this easy, ScheduleOnce has created two composite fields: **Booking - summary (long)** and **Booking - summary**

(short). Simply map these fields to the CRM task description and add any additional ScheduleOnce fields required. Learn more about ScheduleOnce composite fields

- **Meeting time in UTC.** If the meeting time in your CRM task is incorrect, your CRM might be converting time zones using UTC. If this is the case, you will need to map the ScheduleOnce **Booking - Meeting time in UTC time zone** field to your CRM's Task "starting time" field. Your CRM will convert the given time to the appropriate time zone