

Tips for integrating ScheduleOnce with invoicing apps

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Note :

When integrating with invoicing apps, it's best to use one of our [specific triggers](#).

This article includes helpful tips for integrating ScheduleOnce with invoicing apps

Supported use cases

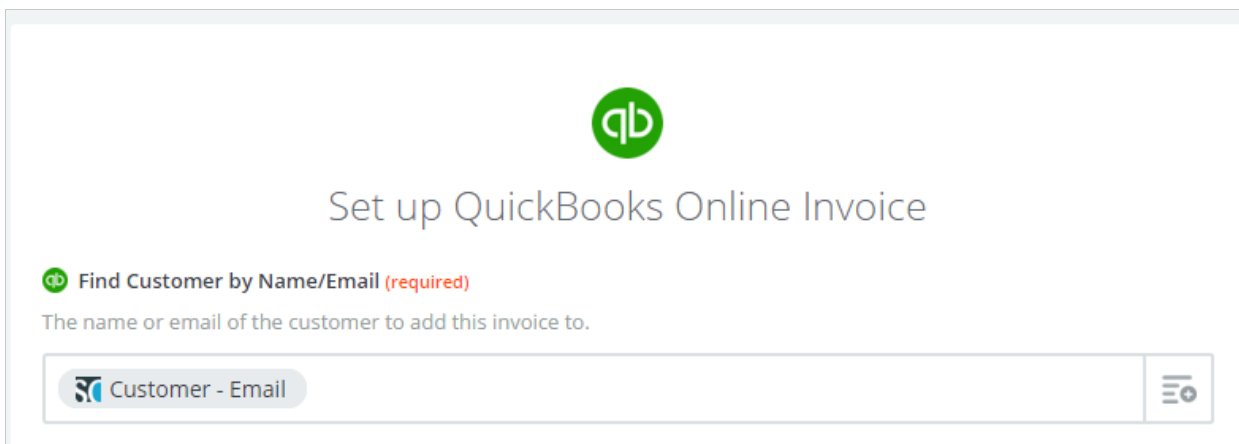
Using ScheduleOnce with Zapier provides support the following invoicing use cases:

1. When a booking is made in ScheduleOnce, a new customer can be created in the invoicing app.
2. When a booking is made in ScheduleOnce, a new invoice with one line item (including invoice header, footer and line item) can be created in the invoicing app. In most invoicing apps, the invoice will be created under the relevant customer record.

Field mapping tips


Mapping ScheduleOnce fields to invoicing app fields is straightforward. The following fields may deserve more attention:

- **Customer identification.** Identifying a customer based on their email address is considered best practice. For example, Quickbooks Online retrieves customer information based on the customer's email address. It then displays this information when creating an invoice. What this means is that the customer's email address is a unique customer identifier. In order to use this functionality, you must map ScheduleOnce's. If this option is not supported by your invoicing app, the app will most often try and find existing records based on the customer name. If a record cannot be found, the app will create a new record with the given information.



- **Payment due date.** If you want to automatically set the **Payment due date** field on the invoice, you can use the **Zapier Adjusting Date** option. Choose the relevant field, such as **Booking – Start time (Customer's time zone)**, and then add, for instance, **+30d** if you want to set a 30 days due date for the invoice. Make sure there is a space between the ScheduleOnce field name and the additional entry **+30d**. [Learn more about modifying](#)

dates and times in Zapier

 Find Customer by Name/Email (required)

The name or email of the customer to add this invoice to.

- **Line item description.** You can aggregate multiple ScheduleOnce fields and text to an invoice line description. This tactic provides a clear description of the service you offer and charge for. To make this easy, ScheduleOnce has created the **Booking - Invoice line item summary composite field**, which includes the meeting subject, time, duration, and the booking page owner. [Learn more about ScheduleOnce composite fields](#)