

Ensuring that Customers reschedule with the same Booking page

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If your Master page includes multiple Booking pages and associated Event types, you can define how bookings will be assigned during the scheduling process. You can decide whether or not a rescheduled booking is assigned to the same Team member originally assigned to it.

If you enable this option, the same Team member is responsible for the service provided to the Customer during the entire booking lifecycle, resulting in a smooth Customer experience.

In this article, you will learn how to ensure that Customers reschedule with the same Booking page.

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- Scheduling scenarios
 - Customer reschedules a booking
 - User sends a request to reschedule for the same Event type

Requirements

To enable this rescheduling option:

- You must be a OnceHub Administrator
- You must be working with Event types
- The Master page scenario must be Event types first, Booking pages first, or Rule-based assignment with Static rules

How to enable restricted rescheduling

During the rescheduling process, you have the option to limit rescheduling to the same Booking page that the Customer made the original booking with. To enable this restricted rescheduling option, use the following steps:

- 1. Go to **Booking pages** in the bar on the left.
- 2. Select the relevant Master page.
- 3. Select the **Assignment** section.
- 4. If your Master pages uses Rule based assignment with Static rules: in the **Distribution method** section, check the box marked **Rescheduling is only possible on the page on which the booking was made** (Figure 1).

er.	K (Mage) Master pag	ge: Sales …	Master page	Sales	•
	Overview	Assignment			?
	Assignment	1 Rule types			?
	Labels and	\bigcirc Dynamic - Event-based assignment with Resource pools and Booking pages (i)			
	instructions	\odot Static - Based on existing Event type-Booking page associations (i)			
	Public content				
	Share & Publish 🕞	2 Distribution method			
		Pooled availability (1)			
		\bigcirc Pooled availability with priority $\textcircled{3}$			
		\bigcirc Find member by time $\textcircled{1}$			
		\checkmark Rescheduling is only possible on the page on which the Booking was made (i)			

Figure 1: Limiting rescheduling on a Master page which uses Static rules

(i) Note:

If a Master page is using Dynamic rules or Resource pools, then a Customer can only reschedule with the original Booking page.

5. If your Master pages uses Event types first or Booking pages first: in **Assignment upon reschedule** section, check the box marked **Reschedule is only possible on the page on which the booking was made** (Figure 2).

K (Mage) Master pa	(No. Master page: Marketing ··· Master		
Overview	Assignment		?
Assignment	1 Included Booking pages This Master page can only include Booking pages	with Event types.	
Share & Publish □→	Booking page Event types		
	DanaFisher 30-minute m	eeting, 15-minute meeting, 60-minute meeting	Remove
	 Assignment upon reschedule Reschedule is only possible on the page on whether the page on whether the page on whether the page on the page on whether the page on the page on whether the page on th	nich the booking was made $\widehat{1}$	

Figure 2: Limiting rescheduling on a Master page using Event types first or Booking pages first

6. Click Save.

Scheduling scenarios

When the Customer reschedules a booking while restricted rescheduling is enabled, they will be presented with the same Booking page that the original booking was made on. The reschedule option is available whether you work with

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Automatic mode or Booking with approval.

i Note:

If the Booking page ownership has been changed, the Customer will see the updated Booking page, rather than the original one.

The reschedule option is applied to the following scheduling scenarios:

Customer reschedules a booking

The Customer clicks the Cancel/reschedule link from the booking confirmation notification and reschedules the booking.

- If the Booking owner and Booking page owner are the same: In the Activity stream, the original event is simply updated with the new time and moved in the calendar as a Rescheduled activity. There is no canceled activity and one calendar event is used for the entire booking lifecycle, keeping your records more consistent and efficient.
- If the Booking owner and Booking page owner are different: In the Activity stream, the original activity is canceled and a new activity is created. Learn more about Booking reassignment

Learn more about rescheduling by a Customer

User sends a request to reschedule for the same Event type

In this case, the Customer clicks the **Reschedule now** button in the reschedule request email notification (Figure 3) and reschedules the booking. In the Activity stream, the original activity is canceled and a new activity is created when the Customer reschedules. Learn more about rescheduling by User with Event types

Please reschedule your booking				
Dear John, The person you were scheduled to meet canceled your booking and would like you to				
reschedule. If the event is in your calendar, please remember to cancel it.				
Reschedule reason				
you.				
Reschedule now				

Figure 3: Reschedule request email notification to Customer

