

User action: Cancel or reschedule when connected via the PC connector for Outlook

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When you're connected to an Outlook Calendar via the PC connector for Outlook, you can select whether changes made in your connected calendar are reflected in OnceHub.



This article only applies to calendar actions done by Users while connected to Outlook Calendar via the PC connector for Outlook. It does not apply to other calendars integrations, or to any calendar action done by the Customer.

In this article, you'll learn how about cancelling and rescheduling in your Outlook calendar

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Adjusting the Outlook Calendar action settings

Log into OnceHub and go to **Setup** -> **OnceHub setup** -> Lefthand sidebar -> **Integrations** -> Calendar integration.

Under the **Outlook Calendar actions** heading, you'll see two checkboxes (Figure 1). These control how the Outlook Calendar two-way sync will function. By default, both are unchecked.

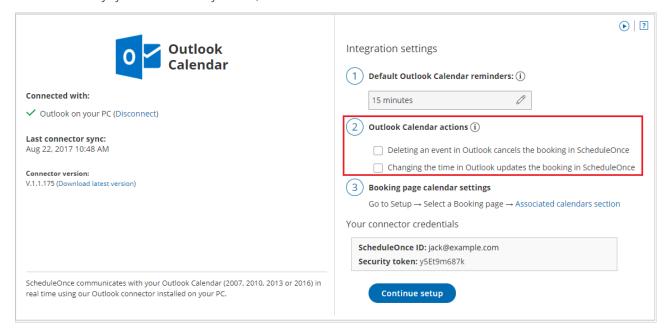


Figure 1: Outlook Calendar integration settings



Cancelling an event in your connected Outlook Calendar

If you delete a calendar event created by a OnceHub booking while the **Deleting an event in Outlook cancels the booking in OnceHub** box is checked, the booking will automatically be canceled in OnceHub.

When you delete an event in your calendar, the following actions are performed as if you (the User) canceled the booking in OnceHub:

- Your Customer receives a cancellation notification.
- The event is deleted from your calendar, and the time is set to Free.
- If you're using any other integrations (like CRM, video conferencing or Zapier), they are updated with the cancellation.
- If you are using Payment integration, no refund is issued. If your Customer is entitled to a refund, you can refund them manually via OnceHub or via PayPal.



In cases of a Panel meetings, if the Primary team member deletes the calendar event, the booking is automatically canceled in OnceHub for all Panel members. That means for both the Primary team member and all Additional team members.

If you delete a calendar event created by a OnceHub booking while this box is **unchecked**, the booking remains unchanged in OnceHub, no email notifications are sent and integrations are not updated.

Rescheduling an event in your connected Outlook Calendar

The **Changing the time in Outlook updates the booking in OnceHub** option determines how OnceHub is updated with the new time of the event. When you move a booking in your connected calendar, you're actually rescheduling on behalf of your Customer. Therefore, the time change must be coordinated with your Customer. No email notifications are sent to you or your Customer.



The reschedule functionality will only work when events are modified in the same calendar. Modifications in Additional booking calendars are disregarded.

When you move an event in your calendar while this box is checked, the following actions are performed:

- The OnceHub booking time is updated immediately.
- All reminders are sent on schedule.
- All integrations (CRM, video conferencing, Zapier, and payment) are updated as well.
- The status of future events is changed to **Rescheduled**.

If you move a calendar event created by a OnceHub booking while this box is **unchecked**, the OnceHub booking time is only updated when the next reminder is due, subsequent reminders are sent on schedule and integrations are not updated.



In cases of Panel meetings, if the Primary team member moves a booking in their connected calendar, the booking is automatically rescheduled for all panel members. That means for both the Primary team member and all Additional team members.



The Customer calendar event

Whether or not your Customer's calendar will be updated is based on your choice in Outlook's event update dialog box. Make sure to select **Save changes and send update** or **Send cancellation**, so that your Customer's calendar is updated. Learn more about the Customer's calendar event

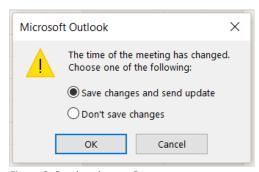


Figure 2: Send update to Customer