

Offer scheduling with your bot

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Your bot can offer scheduling to your visitors. They can schedule with any available team member with the right skillset. Alternatively, you can route them to book with a specific member suited for their [audience](#), whether based on region, product interest, or anything else.

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How does it work?

ChatOnce allows you to schedule with your visitors in the bot widget. This may be everyone who visits or you can narrow it down and only offer scheduling to qualified visitors, using [routing rules](#).

Offering scheduling within the bot provides a seamless, in-widget experience for your visitors. They'll never leave your site as they book with the right team member.

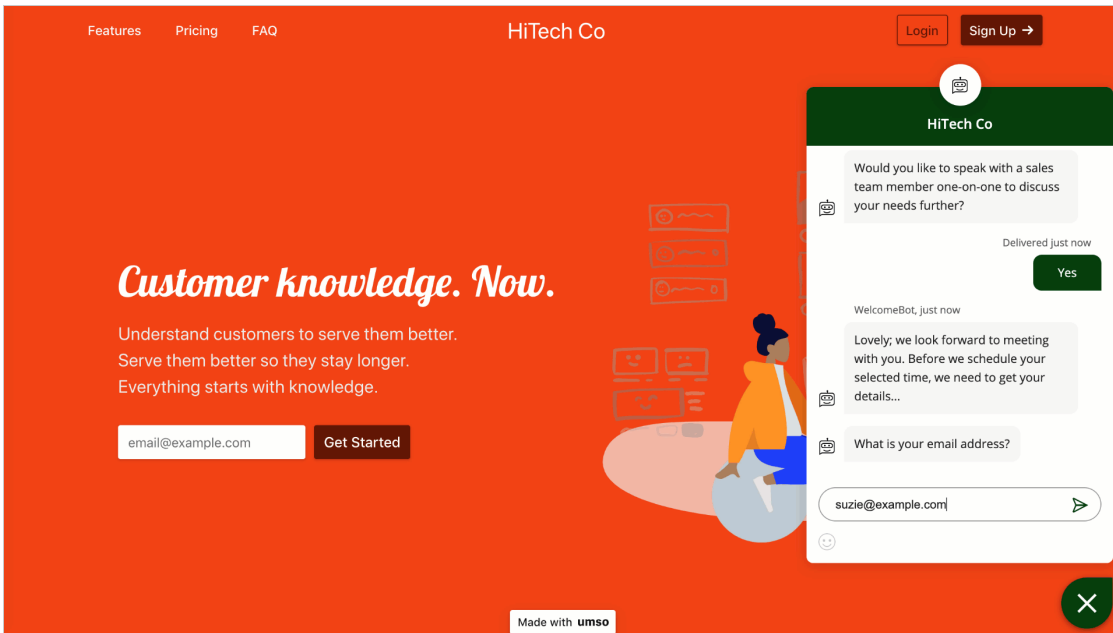


Figure 1: Offer scheduling within the bot widget

Scheduling can be offered in two ways:

- Automated through your bot's routing
- Offered manually during a live chat

What's required?

Licensing

To offer scheduling, any team members who will receive bookings need a paid scheduled meetings license. [Learn more](#)

Visitor data

At minimum, you need the visitor's **name** (first and last) and **email** to schedule with them. If you haven't already asked for their name and email during the bot conversation, this will be asked after they select a date and time.

Configuration

Event types

In ScheduleOnce, you can create one or more Event types, according to the meeting type(s) you'll offer your visitors. For instance, you can create an Event type called **Demo** to offer a 30-minute demo.

To create or edit an Event type, go to **Setup -> ScheduleOnce setup -> Event types** panel.

[Learn more about creating an Event type](#)

Booking pages

Each person receiving bookings will need their own Booking page. You can define their availability for meetings, configure how they'll meet with the visitor (through video session, by phone, in person, etc.), and more, specific to

that person's requirements.

To create or edit a Booking page, go to **Setup -> ScheduleOnce setup -> Booking pages** panel.

[Learn more about creating a Booking page](#)

Resource pools

To define who receives the booking, you can either specify a team, using a Resource pool, or an individual.

With a Resource pool, you can select multiple Booking pages owned by any qualified team members who can take the booking.

For instance, you can create a Sales Engineer resource pool and assign all bookings using either round robin or ScheduleOnce's pooled availability algorithm to distribute bookings evenly.

- With **Round robin assignment**, bookings will be assigned to the next team member in line. Visitors will only see the availability of the designated team member. This ensures an equal and fair distribution among the members of your pool.
[Learn more about Round robin assignment](#)
- With **Pooled availability**, your entire team's availability will be combined into a single booking calendar. When a Customer selects a time, the booking is automatically assigned to the team member with the longest idle time, meaning the Team member who has not received a booking in the longest time. Pooled availability allows you to provide maximum availability to your visitors.
[Learn more about Pooled availability](#)
- With **Pooled availability with priority**, your entire team's availability will be combined into a single booking calendar. When visitors select a time, the booking is automatically assigned to the available team member with the highest priority. This allows you to provide maximum availability to customers, while ensuring the most qualified team member conducts your meetings.
[Learn more about Pooled availability with priority](#)

To create or edit a Resource pool:

1. Go to **Setup -> ScheduleOnce setup** and open the lefthand sidebar.
2. In the **Tools** section, select **Resource pools**.

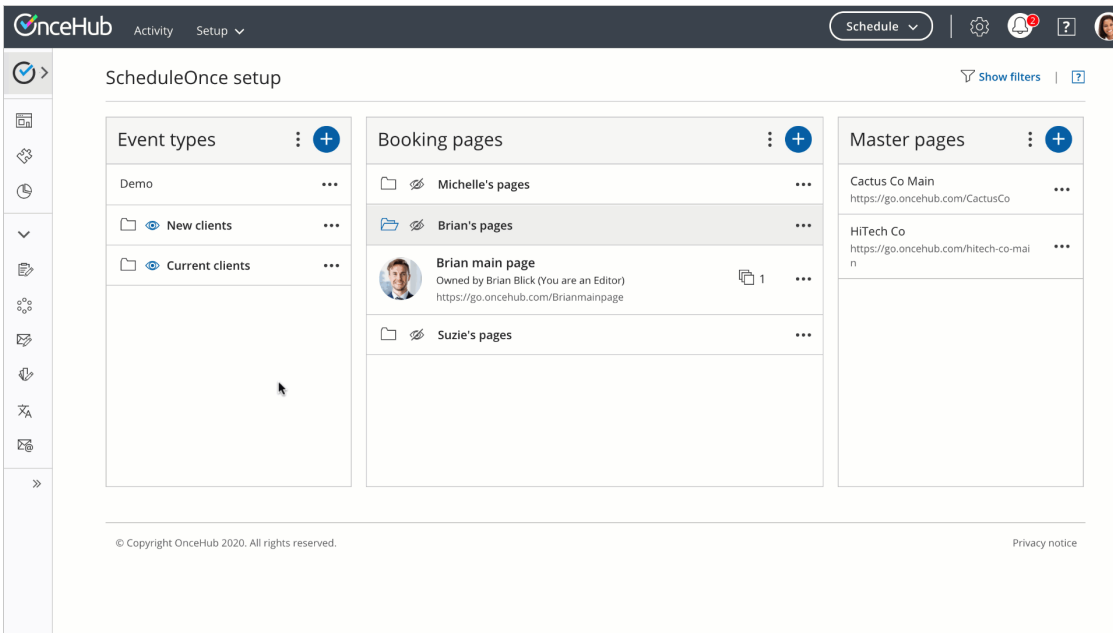


Figure 2: Navigate to Resource pools

[Learn more about creating a Resource pool](#)

Scheduling action in ChatOnce

Once you've configured the right Booking page(s), Event type(s), and Resource pool(s), you can add the Scheduling action to your bot's conversation.

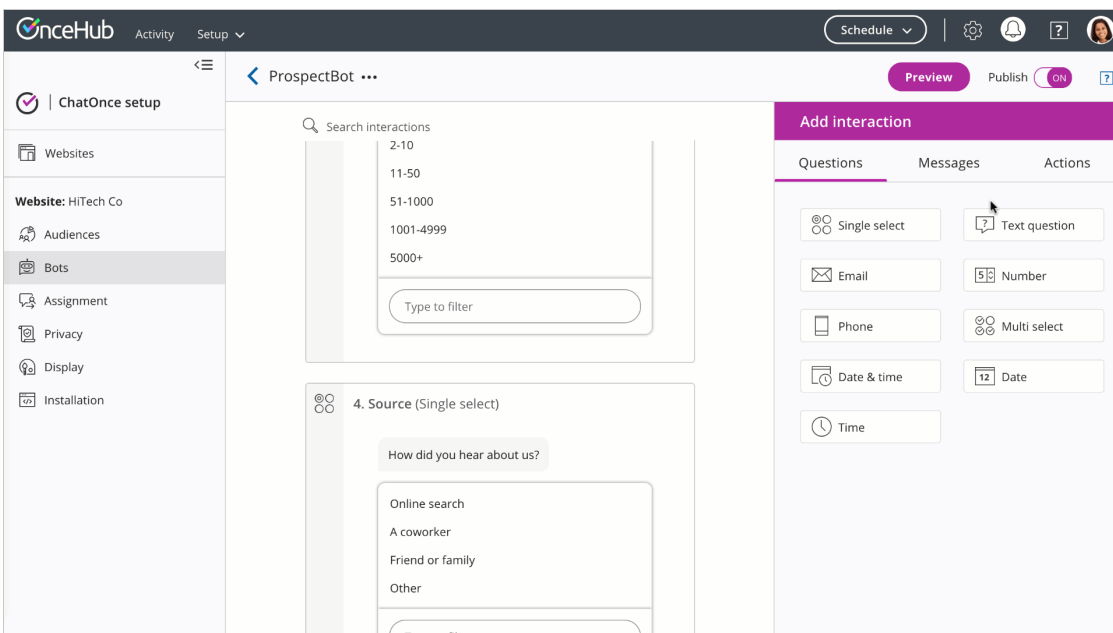


Figure 3: Add the Scheduling action to your bot's conversation

You'll select the correct **Event type** and **Booking owner** for that meeting. For the Booking owner step, you'll either select a Resource pool to book using a team or a specific Booking page to book with an individual.


If more than one team member from your organization should join the meeting, you can select them or the relevant Resource pool with the optional **Additional team members** field.

Offer scheduling during live chat

As you [chat live with your visitors](#), an agent may decide to offer another interaction through a scheduled meeting.

Offering scheduling is especially helpful when you want to have a more dynamic conversation than one can accomplish over live chat, especially when discussing a deal, product or service features, and complex processes. You may also want to meet a high-value lead face-to-face, per se, and ensure they connect with the right people quickly.

Agents can offer a specific scheduling page to your visitor, based on the context of the chat conversation and what you already know about that visitor (for instance, their current lead owner).

A hexagonal icon containing an exclamation mark, used to denote a note or important information.

Note:

Currently bookings can integrate with Salesforce. We do not integrate ChatOnce with other CRMs directly.

We recommend considering our [Zapier integration](#) to update these systems until other integrations go live.