The Booking form tab

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The **Booking form** tab allows you to set up your calendar to ask your customers questions after they have selected a time to book with you. The options available help you to gather basic information from your customers, which will be relayed to you in the meeting confirmation email.

The booking form will only be displayed to your visitors if your booking calendar is shared directly, such as when embedded on a website or shared with a link. The booking form won't be displayed when the booking calendar is used within a chatbot or routing form, because those tools allow you to add questions *before* offering a booking, which defines the experience and workflow as a customer schedules.

Note:

If you want to ask visitors screening questions before they select a date and time, use a routing form or a chatbot.

When configuring a booking calendar, the **Booking form** tab is located along the upper menu. (Figure 1)

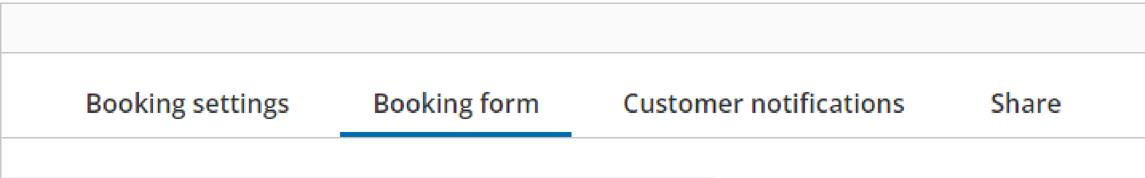


Figure 1: The location of the Booking form tab

Default fields

The default questions are the customer's full name and email address which are required to make the booking. In the sidebar of the booking form tab, you can add multiple types of questions to customize the information you gather from your customers.

To change the order of a field, click on the left side of the field, and drag and drop it.

You can't delete default fields.

Contact full name:

Although you can't remove this question or alter the contact field, you can edit the text that is shown to customers. To do this:

1. Click on the interaction, and in the column on the right, type in the box below the heading **Question text** to add your own text.
2. Click **Save** at the bottom of the column.

Contact email:

You can't remove this question or alter the contact field. You can edit the text of the question. To do this:

1. Click on the interaction, and in the column on the right, type in the box below the heading **Question text** to

add your own text.
2. Click **Save** at the bottom of the column.

Adding additional guests:

When configuring the contact email field, you can allow your customers to add up to 10 additional guests. To do this:

1. Click on the **Contact email** interaction.
2. In the toolbar on the right, click the **Allow additional guests** toggle on.
3. This will display a field to your customer in which they can add additional email addresses. These addresses will be copied into the customer notification emails, and invited to the meeting.
4. Add text that will be displayed to your customer under the heading **Question text**.
5. Below, you can choose whether to save any additional email addresses the customer may add in the meeting only, or as a new contact profile.
6. Click **Save** at the bottom of the column when you're happy with your settings.

Conditional fields

Conditional fields are displayed by default based on the configuration of your booking calendar.

SMS notifications: If the user selects SMS within customer notification options, then the 'mobile number field' will be displayed to the customer after they select a date and time. A checkbox which asks the customer to consent to receiving SMS notifications will be displayed.

Location: This field displays the meeting location options available to the customer based on what you have provided. If you do not provide any location, or just one, then this field is not displayed. Meeting location can be set in the booking settings tab.

The location options are:

- **Video conferencing**: Displays the video conferencing options available to the customer. For example, if you have connected to both Zoom and Google Meet, then both options will be offered to your customers to choose between.
- **Physical location**: Displays the physical location options you have provided.
- **Phone**: Allows you to call your customer on their phone number. If you offer this option, then the customer will be prompted to provide their phone number in the booking form, after selecting a meeting time. You will find the customer's phone number in booking notification emails.

Note:

If the customer does not agree to receive SMS notifications, then they can still receive email notifications and reminders.

Additional booking form tab fields

The buttons to add these fields appear in the toolbar on the right when in the booking form tab. To add them to the booking form, drag the field button from the toolbar and drop it in the order you would like it to appear to your customer.

By clicking on an individual field, you can fill in the details, such as the question you want it to ask your customer, where the information will be saved, and whether you want to make it a required answer or not.

To change the order the fields appear in, click on the left side of the field, and drag and drop it.

To delete a field, hover over it and click the bin icon. If no bin icon appears, then this is a required field and can't be deleted.

Text question

These are questions to which the customer can reply with their own text.

Single select

A single select asks a question, and allows the customer to select one answer in response. You configure these questions and the answers when you add the interaction to the booking form.

The possible answers can be displayed either as a dropdown menu, or a list of buttons.

Multi select

A single select asks a question, and allows the customer to select multiple answers in response. You configure these questions and the answers when you add the interaction to the booking form.

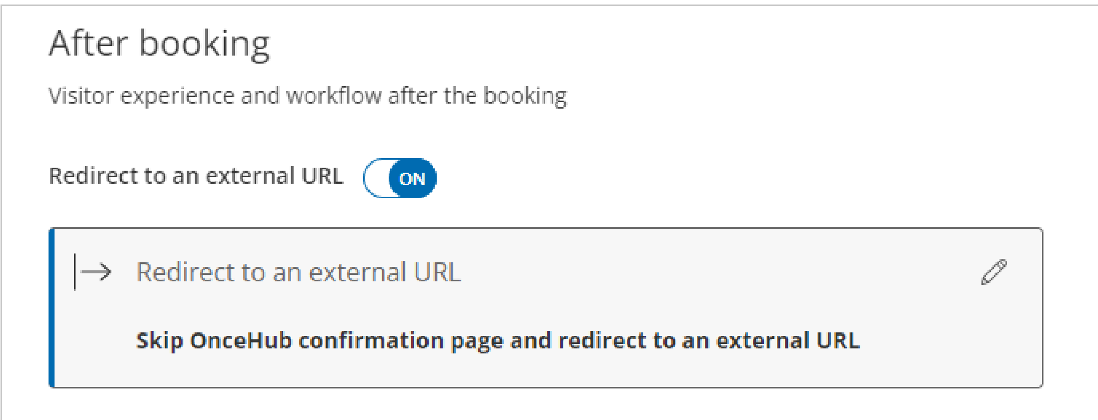
The possible answers can be displayed either as a dropdown menu, or a list of buttons.

Redirecting to an external URL

At the bottom of the booking form builder, you can turn on the option for customers to redirect to an external URL which you provide, once they have finished booking time with you, instead of the OnceHub confirmation page.

You could use this feature in the following ways:

1. Redirect the customer to a thank you/landing page or a payment page.
2. Measure the effectiveness of your marketing campaigns by adding tracking codes such as AdWords, Facebook pixel, or Google Analytics code to the redirect target page.
3. Offer customized content upon confirmation to ensure you can have the most productive meeting.
4. Redirect to a post-meeting survey or feedback form to gather insights and improve services.



When you turn it on, a toolbar will appear on the right which will allow you to add URLs to redirect the customer to after these events:

- After customer schedules
- After customer reschedules
- After customer cancels

Add the URL you would like to apply to each event, and click **Save** at the bottom of the toolbar to confirm these changes.