Prepopulated Booking forms [Classic]

It's not always necessary to collect Customer information as part of the scheduling process. For example, you may already have the data in your CRM. In these cases, the Booking form is typically skipped completely (if you have all the data you need) or prepopulated (if you require additional data).

> In this article:
> - Prepopulated Booking forms
> - Prepopulation with URL Parameters
> - Prepopulation with Customer data stored in a database

Prepopulated Booking forms

When the Booking form is prepopulated, it can operate in two modes: private or public. The mode of the Booking form depends on the source of the prepopulation data provided. Prepopulation data can originate from two sources:

- Parameters passed in the URL to the Booking page.
- Customer information stored in a Database such as your CRM or OnceHub account.

Prepopulation with URL Parameters

Prepopulation data provided directly in the Public link (as URL parameters) is visible in the browser address bar. By definition, this information is not private. When forms are prepopulated with data from URL parameters, the form displays the information publicly (Figure 1). In public mode, the data is visible and can be edited by the Customer before submission.
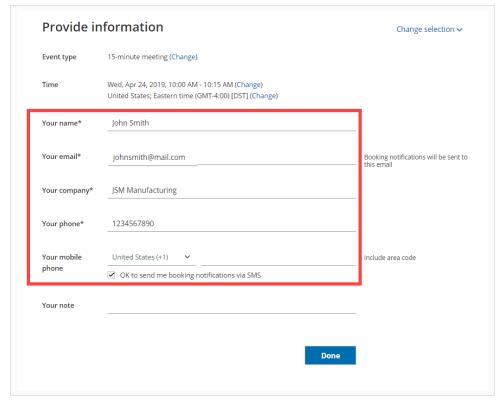

Figure 1: Booking form with data prepopulated from URL parameters

Prepopulation with Customer data stored in a database

We are committed to keeping Customer data safe and secure. We have added a layer of security for bookings made with contacts stored in databases, such as your Infusionsoft CRM or Salesforce CRM.

If the prepopulation data is from a database, the form works in private mode. In private mode, prepopulated data can't be viewed or edited by the Customer before submission. The prepopulated data used in the Booking is indicated as a checklist and the Customer can provide additional information if required.

> ⓘ **Note:**
>
> To use data from a database in a prepopulated Booking form, you first have to connect to Infusionsoft or connect to Salesforce.
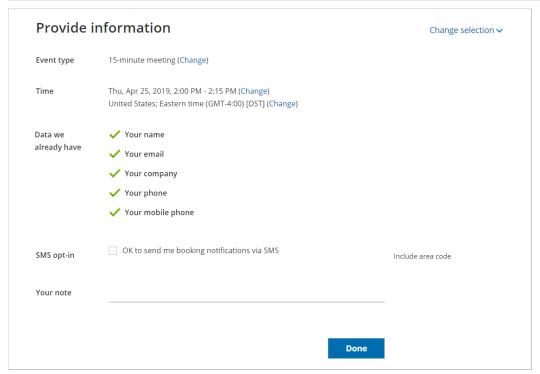

Figure 2: Data prepopulated from a database

Private mode is automatically used when necessary (no configuration is required). It is enabled:

- When you use a record ID from your CRM to prepopulate the Booking form.
- When a customer reschedules an existing appointment and additional data is required to complete the booking. If no additional data is required, the Booking form step will be skipped during rescheduling.

Private mode protects customer privacy. Customer data from your CRM or OnceHub account should not be visible on a page accessible from the web. Click here to see the OnceHub Privacy Notice.

> ⓘ **Note:**
>
> For security and privacy reasons, using CRM record IDs to skip or prepopulate the Booking form is not compatible with collecting data from an embedded Booking page or redirecting booking confirmation data.