Eligibility for booking reassignment FAQs [Legacy]

Booking reassignment allows you to reassign bookings from one Team member to another from your Activity stream.

In this article, you'll learn about the rules and requirements for booking reassignment.

Who can reassign a booking?

To reassign a booking, you must be a OnceHub Administrator.

Additionally, you must be the Owner, an Editor, or a Viewer of the Booking page that the booking was made on.

Which bookings can be reassigned?

Booking reassignment is only available between Users who are both connected to Google Calendar, or Users who are both **not connected** to any calendar. Booking reassignment is not available for Users connected to other calendars.

The meeting type must be a one-on-one meeting.

> **(i) Note:**
>
> You cannot reassign a booking from a User who is **not connected** to a calendar to a User who **is connected** to Google Calendar, and vice versa.
>
> You can only reassign bookings between Users with similar calendar configurations. For example, you can reassign a booking from a User connected to Google Calendar to another User who is also connected to Google Calendar.

In specific booking scenarios, you won't be able to see the **Reassign the booking** option in the **Details** pane of the activity. The following scenarios are not supported by booking reassignment:

- The scheduling status is **No-show**, **Canceled**, **Completed**, or **Requested**.
- The Booking page Owner is connected to Exchange/Outlook Calendar, Office 365 Calendar, or iCloud Calendar.
- The booking is a Group session, Session package, or a single session that is part of a Session package.

Which Booking pages can receive a reassigned booking?

When you reassign a booking, you'll select the Booking page which you would like to reassign the booking to. The Booking pages available for reassignment follow the rules below:

- The Booking page Owner is connected to Google Calendar, or is not connected to any calendar.
- The Scheduling options are set to one-on-one meetings.
- The Booking page has no Booking with approval Event types associated with it.

> ⓘ **Note:**
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> To help you make an informed decision during the booking reassignment process, you can see the availability of each eligible Booking page at the designated booking time in the **Reassign the booking** pop-up.
>
> You can reassign a booking to a Booking page that is available or busy at the meeting time. Learn more about reassigning a booking

How does booking reassignment work with video conferencing integration?

Booking reassignment is supported for GoToMeeting and Zoom integrations.

When a booking is reassigned from one Booking page to another and both are **connected to the same video conferencing solution**, the event ownership is updated automatically in the video conferencing app. All future User notifications and Customer notifications will include the updated video conferencing details.

> ⓘ **Note:**
>
> Reassignment when connected to Zoom is only supported when both parties have a Professional-level Zoom account.

If the original Booking page and target Booking pages are **not connected to the same video conferencing solution**, the video conferencing solution will not be updated automatically and you will need to inform your Customer regarding the future location details. In this case, future Customer notifications will not include location details.

> ⓘ **Note:**
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> Booking reassignment is not supported for Webex Meetings integration.

How does booking reassignment work with other meeting locations?

When the Booking page **Meeting location** is set to **This is a face-to-face meeting**, or the virtual location is set to **Video conferencing: Other**, the booking can be reassigned but the location will not be updated for the reassigned booking.

You will need to inform your Customer regarding the future location details. In this case, subsequent Customer notifications will not include location details.

How does booking reassignment work with CRM integration?

Booking reassignment is supported for Salesforce and Infusionsoft integrations. When a booking is reassigned from one Booking page to another and both **are connected to the same CRM solution**, the event ownership is updated automatically in the CRM integration app.

- In Salesforce, the Event status field will be updated to either **Scheduled (Reassigned by User)** or **Rescheduled (Reassigned by User)**, depending on the booking lifecycle.
- In Infusionsoft, specific booking lifecycle tags will be automatically added to Contact records and will indicate if a booking has been reassigned.

If the original and target Booking pages **are not connected to the same CRM solution**, the CRM integration app will not be updated automatically and you will need to update the app manually.