Building a routing form

There's so much you can do with routing forms, but here's a quick rundown of the most important things you should know as you're getting started. This guide shows you the main steps needed to take routing forms live on your website.

The main purpose of a routing form is to engage with visitors on your website through an interactive form, asking questions that qualify them to schedule meetings with your team or chat with them further.

After filling out a routing form, a user's answers determine whether they're offered a time to schedule with your team or the opportunity to chat live with them.

We understand that personalization leads to better engagement in your visitors' website experience. You can create a different routing form for each experience your visitors may have, according to their needs and your business objectives. You can also create one form with multiple paths, taking your visitors through the best interactions for them with conditional routing.

This allows you to customize their experience seamlessly, providing the most effective messaging for that specific audience under the given circumstances. It also raises the likelihood of identifying the right prospects for your team to engage with as high-quality leads.

Creating a routing form

You can create as many routing forms as you like for different pages on your website.

You can access your routing form builder by going to **Routing forms** on the left **→ Create routing form** button.

Here, you'll find the lobby, where you can create new and manage existing routing forms. You can search through your existing forms by typing the name of the form (or, if you're an account admin, the owner's name) or the routing form's share link in the search box.

Start from scratch: You'll start building your routing form with a blank canvas.

Use a template: Choose from one of our many, ready-made templates. The correct template saves time by providing an example routing form you'll adjust according to preference.

Duplicate an existing routing form: If an already-existing form is similar to what you're wanting, you can duplicate that form and tweak it to suit your preferences. Click the three dots on the right-hand side of that specific form and select **Duplicate**.

Building your routing form

Drag and drop interactions into the form's column in the order you prefer.

You have many interaction options for your routing form, allowing you to:

- Ask questions to qualify visitors
- Send follow-up questions depending on their answer, to personalize the experience further
- Offer scheduling to qualified visitors, based on their answers

Interaction options

Questions

You can drag and drop your chosen interactions into your form from the **Interaction** section on the right (if you click an interaction, it will add to the bottom of the form). They will be routed according to the rules you configure (see below).

Question types

Questions require the visitor to respond before continuing the form.

You can choose from various question field types:

- **Single select**: Multiple answer options. The visitor can only select one answer.
- **Multi select**: Multiple answer options. The visitor can select one or more answers.
- **Text question**: Let the visitor answer in their own words
- **Number:** Let the visitor answer with a numerical value.
- **Email**: Request the visitor's email address.
- **Phone**: Request the visitor's phone number.

Actions

Actions cause something to happen when the visitor reaches that interaction. This could be something they see or something only your users see, hidden from the visitor, depending on the action.

Action types

- **Schedule via booking calendar**: Offer them to schedule with you through a booking calendar, without leaving the form. You can offer scheduling to everyone or only route qualified visitors to this action.
- **Schedule via booking page**: Offer them to schedule with you through a booking page, without leaving the form. You can offer scheduling to everyone or only route qualified visitors to this action.
- **Email alert**: Send an internal email alert, invisible to your visitor, when they reach a specific part of the form. You can alert people on your team about qualified visitors who answer in a specific way.
- **Contact status**: Indicate a status (Qualified, Marketing qualified, Sales qualified, or Disqualified) for the contact so you can set other processes in motion on your end based on that status. You can also use this data to optimize your interaction flow, determining the efficiency of your campaigns.
- **Live chat**: Route the visitor to a live chat meeting.
- **End**: End the engagement completely. Your form will not send any more interactions. You cannot route the End action to another interaction.

Preview your routing form

To see a preview, click on the eye icon at any time as you're building your form. You can preview everything as your audience would experience it.

Assigning team members to the form

In the **Assign** tab, you can assign new contacts to team members. This means they'll be the owner of that contact in their activity stream.

If an admin has allowed member users to create and manage forms, members will be able to see any chatbots an admin assigned to them. Turn this permission on or off by selecting the gear icon in the top right corner **→ Settings and permissions → Member permissions**.

1) Assign to a specific team member. If you select multiple people, they'll be assigned the contact based on round robin distribution.

2) If you offer scheduling, you can assign the contact to the team member who received the booking.

Setting your routing form interactions

You can route your interactions by choosing conditions and deciding what to jump to next.

You can get really specific about the routing logic you want. The logic can depend on how your visitor answers the current question or a previous one. You can also base the logic on a contact field already saved to their contact record (for instance, the **Company size** field).

How does routing work?

You can route your interactions by choosing conditions and deciding what your visitors should see next. Either create your next interaction as you route to it OR route to an interaction you've already created.

You can route to the next interaction in two different ways:

- Always route to specific interaction
- Route to interactions based on rules

If you route based on rules, you have three options:

- Route based on this interaction's answer
- Route based on a previous answer
- Route based on a contact field (for example, their company or team size)

How can routing be used?

Qualify a website visitor as they fill out the routing form

To keep your team working efficiently, you may not want to meet with every website visitor, but may place high value on scheduling a meeting with qualified visitors. You can ask targeted questions in your form, routing them either to interactions that do not offer scheduling if you determine this is suitable, or to a scheduling or live chat interaction if they do qualify to meet with your team, based on your criteria.

Set the path for the routing form interactions

You can provide the most optimal experience for a specific website visitor by routing them to the right interactions. This can be based on the options the website visitor selected in a previous or current interaction, or based on information you may already have about them.

Routing options

Your routing rules allow you to specify what happens next in your form. Which interaction does your visitors see after this one? This may depend on their answer to this interaction or a previous one, or based on who they are (a saved contact field).

The interaction you route to next can be one you've already created or you can create it on the spot as you route to it.

You have multiple routing options:

- **Always route to a specific interaction:** If you always want them to see a specific interaction next, no matter the audience's answer, choose this option.
- **Route to interactions based on rules:** If you'd rather send them down one interaction path if they answer a question a certain way, or another path if they answer differently, select this option. You can base this on:
  - The response of the current interaction
  - The response to previous interactions
  - The contact field values you already have for this visitor

Remember, you cannot route the End action to another interaction.

Offer scheduling with your routing form

Your form can offer scheduling to your visitors. They can schedule with any available team member with the right skillset.

How does it work?

Adding a schedule action into your form allows you to schedule with your visitors. 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 form provides a seamless experience for your visitors. They'll never leave your site as they book with the right team member.

What's required?

Licensing

To offer scheduling, any team members who will receive bookings need a user license for scheduled meetings. 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 on the form, this will be the first thing asked when they start to schedule.

Configuration

Event types

You can create one or more Event types, based on 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 **Booking pages** on the left → **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 **Booking pages** on the left → **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 the 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.
- 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.
- 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.

To create or edit a Resource pool:

1. Go to **Booking pages** on the left.
2. On the left, select **Resource pools**.

Schedule action in routing forms

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

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.

Chat live with your routing form visitors

If you want your high-quality leads to get in touch with you as soon as possible, live chat can provide the experience your visitors desire while reducing your time to engagement.

Once you qualify visitors through your form conversation, you can choose the right time to offer live chat to them. This way, people who meet your qualification criteria can engage with you immediately and move to the next level in your funnel.

Add the live chat action to your routing form

While you build your form, you can choose the right moment to route qualified visitors to a live chat conversation.

Add the **Live chat action** to your form.

Configure settings

Hand-off message: After they confirm they'd like to switch over to live chat, this message lets them know you're connecting them to someone on your team.

Timeout settings: Set a timeout period. After the amount of seconds defined, it will show the visitor a timeout message, explaining someone on your team isn't available.

Advanced settings: If you'd like to gather the visitor's name and email before connecting them to a live chat, you can configure the messages they see requesting these details.

Assign live chat conversations to your team

Any Users in your account with a live chat license can accept live chats. Once they toggle **Accept chats** to ON status, OnceHub shows them any live chats that come in through your website.

We recommend all your team members allow browser notifications so they will be sure to see all incoming chats.

Until one User accepts a conversation, it is open for any User currently indicated as available through the availability toggle. Once they accept the conversation, it will no longer be available to others in your account.

During the conversation, they will be able to interact with the visitor and also offer scheduling to them, if they've qualified the conversation further and decided a scheduled meeting could help clarify things further or move the visitor to the next step in your process.

If no team member accepts a chat by the defined timeout period, that chat will disappear from the live chat inbox. The visitor will see your configured timeout message. So your team can take further action, the contact and their conversation can be accessed from the Activity stream.

Notifications for live chat

You will be alerted to live chat requests in the following manners:

Red dot: A red dot will appear next to Live chat in the top navigation bar.

Ringing: You will hear an in-app ringing notification. As long as you've got the OnceHub app open, you will hear the ringing, no matter which tab you're on or if your browser is minimized.

Browser notifications: If you click on Allow browser notifications in the banner at the top of your screen, you will receive pop-up browser notifications for live chat requests. These notifications will appear as long as your

OnceHub app is open, even if your browser is minimized.

Team chat app notifications: Set up team chat app notifications to receive notifications on those platforms. This will help you to not miss live chat requests.

You will receive notifications on your chat app whether you have the OnceHub app open or closed. When you receive a notification, the basic details of the visitor will be included in the notification, as well as a link that will navigate you to the app where you can accept the live chat (within the given timeout period you've set).

You need to set up the notifications each time you create a form. Add the Live chat interaction. Include the Webhook URL in the Webhook notifications bar.

We support the following chat apps:

- Slack
- Google Chat
- Microsoft Teams

Ending chat

A team member can end the chat at any point, once they determine the conversation is ready to be resolved.

Please note that if the visitor is idle for ten minutes, the chat ends automatically. You can view the conversation in the Activity stream.

Receiving routing forms notifications

As you build your form, you may add questions or other interactions that are significant to someone on your team. For instance, the visitor reached a certain part of the form or answered a question with a specific answer that indicates they're qualified for further sales action on your end, even if they don't book with you during the form or complete all the questions.

You can add internal email notifications at any point in the form, so the right people stay updated on your new lead and their engagement with you. The **email alert action** is 100% internal to your team. Your visitors will not see this interaction on their end and they will not receive any notifications from it.

1. Identify which interactions need an email notification.

This may be a critical qualification interaction, such as team size or a specific product they're interested in learning more about.

2. On the Routing tab, create routing logic to that email alert

For each relevant interaction, you can add a rule that routes the form to the email alert action. For instance, you can send an email whenever a visitor reaches that interaction in the form, or you can send it only if they answer a certain way.

Either route to an already-existing email action or you can create a new one from the routing tab (**Then route to +Create new interaction**).

3. Creating the email alert action

As mentioned, you can either create this action from the routing tab on the previous step or create a new one by dragging an Email alert action into the form.

Fill out the relevant fields you'll see in the email sent to the chosen recipients.

