

Adding Custom fields to the Salesforce Activity Event Page Layout [Classic]

The Salesforce setup process includes 5 phases: [API connection](#), [Installation](#), [Field validation](#), [Field mapping](#), and [Creation rules](#).

In this article, you'll learn how to add the **Event status** and the **Cancel/reschedule reason** fields to the Activity Event Page Layout in Salesforce.

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Salesforce Activity Events

When a booking is made, a Salesforce Activity Event is always created and related to a Salesforce Lead, Contact, or Case record. The creation of the Activity Event is only the first step in the booking lifecycle. After the Activity Event is created, it is continuously updated through all phases of the booking lifecycle: **Scheduled**, **Rescheduled**, **Completed**, **Canceled**, or **No-show**. [Learn more about activity statuses](#)

The **Event status** and the **Cancel/reschedule reason** fields are provided with the OnceHub connector for Salesforce and are mapped to OnceHub data. When these fields are added to the Event Page Layout, they are used

for updating the Activity Event with any change in the booking lifecycle.

- **Event status:** This field indicates the current phase of the booking in the booking lifecycle: **Scheduled**, **Rescheduled**, **Completed**, **Canceled**, or **No-show**.
- **Cancel/reschedule reason:** This field adds additional information to the **Canceled** and **Rescheduled** lifecycle phases by providing the reason given by the Customer or Booking owner when a booking is canceled or rescheduled.

Salesforce provides a simple WYSIWYG editor (What You See Is What You Get) to customize the Event Page Layout. You can drag and drop new elements onto the page, or drag existing page elements around to change the layout to suit your preferences.

Requirements

To add the **Event status** and the **Cancel/reschedule reason** fields to the Activity Event layout in Salesforce, you will need:

- A Salesforce Administrator for your organization.
- [An installed OnceHub connector for Salesforce](#).

Adding Custom fields to Activity Event Page Layout in Salesforce

1. Sign in to Salesforce as [your API user](#).
2. Go to the **Setup** page.
3. In the **Platform Tools** section, go to **Objects and Fields -> Object Manager** (Figure 1).

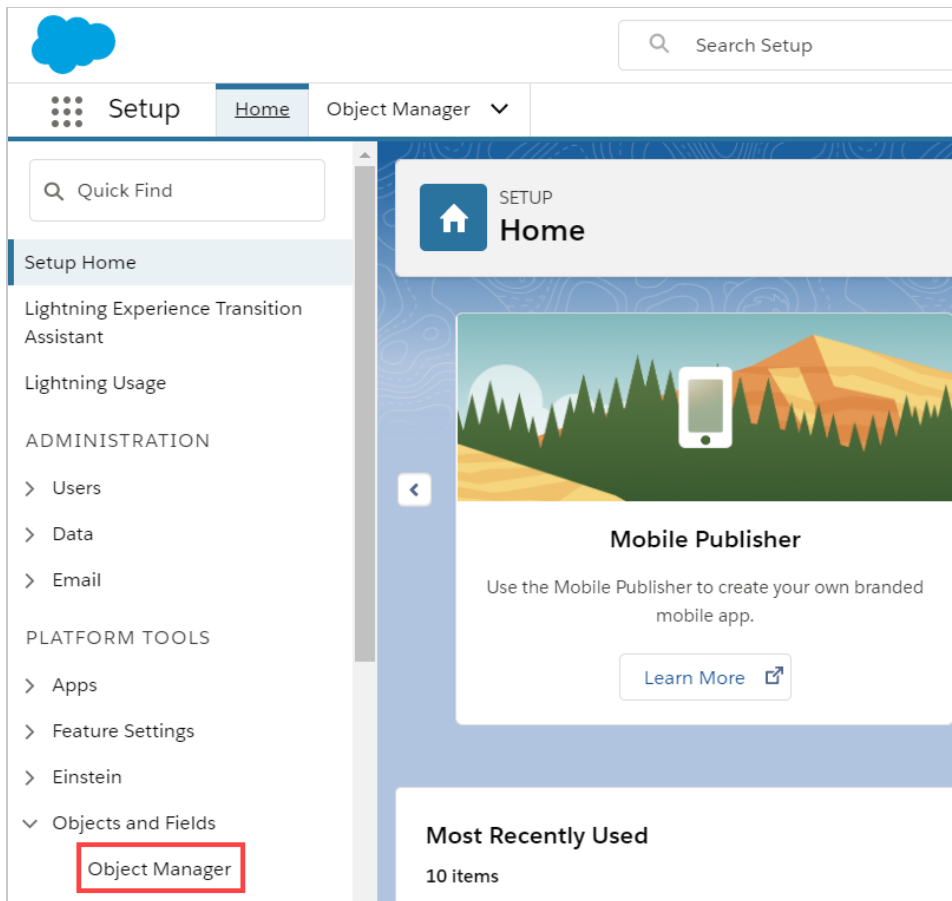


Figure 1: Object Manager in the Objects and Fields menu

4. In the **Object Manager** list, select **Event** (Figure 2).


 SETUP Object Manager 51+ Items, Sorted by Label	
Duplicate Record Item	DuplicateRecordItem
Duplicate Record Set	DuplicateRecordSet
Email Message	EmailMessage
Event	Event
Image	Image
Individual	Individual
Lead	Lead

Figure 2: Event in the Object Manager list

5. On the **Event** page, select **Page Layouts -> Event Layout** (Figure 3).

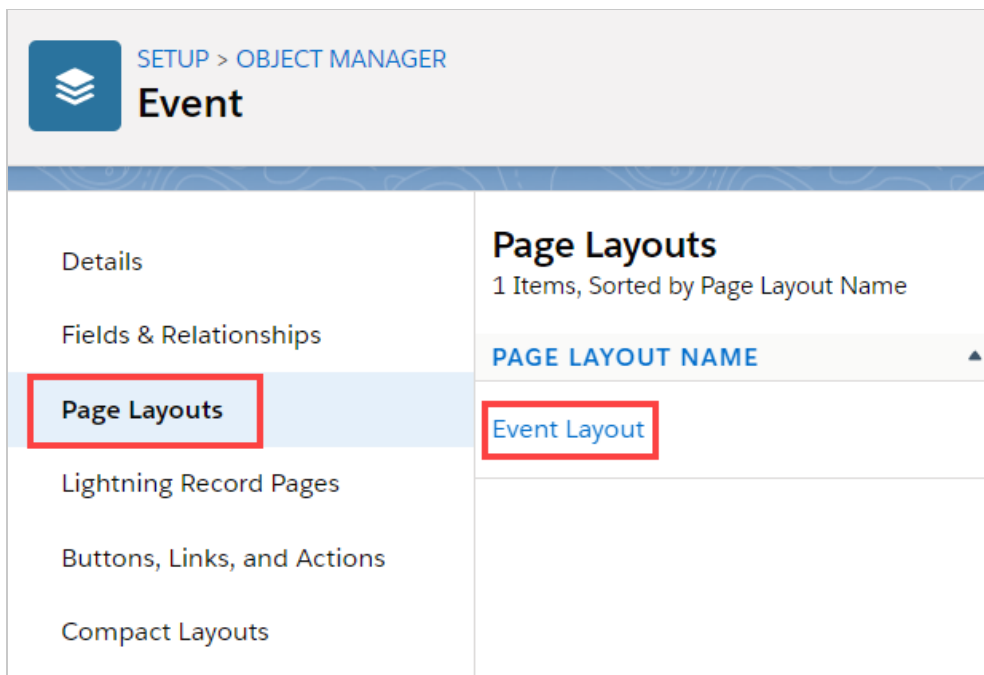


Figure 3: Event layout

- Drag the **Section** element from the Editor menu and drop it below the **Calendar Details** section (Figure 4) to create a new section for the OnceHub fields that you want to add.

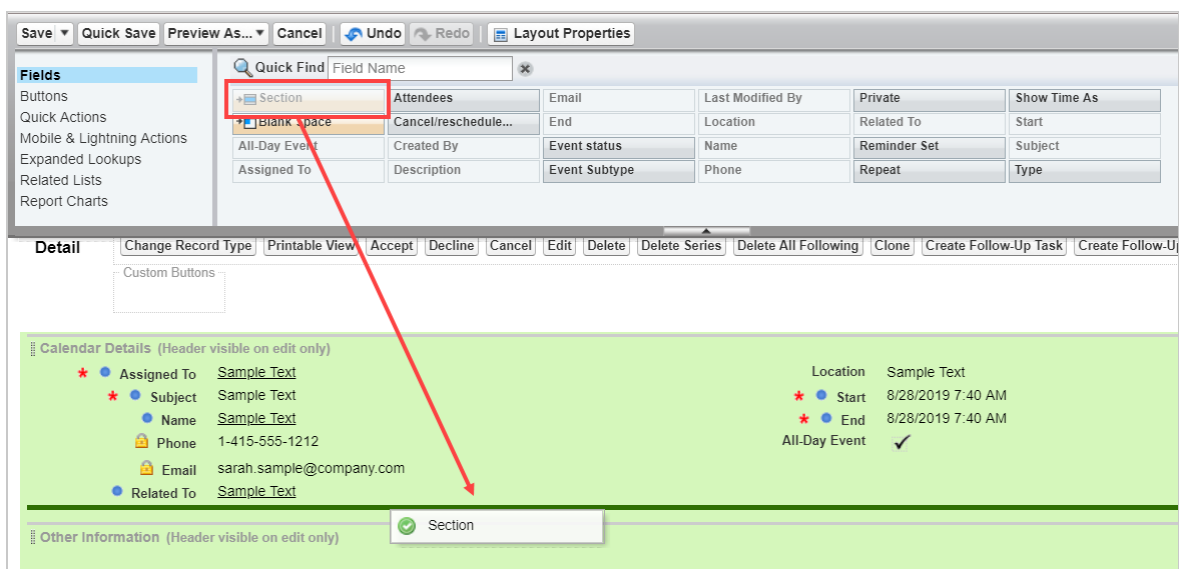
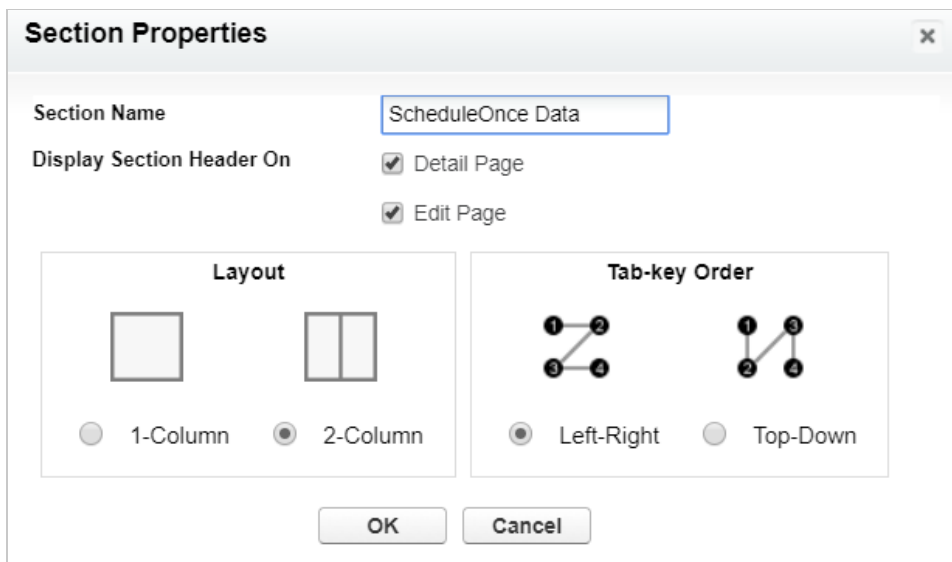


Figure 4: Add a new section

- In the **Section Properties** pop-up, enter a **Section Name** and click **OK** (Figure 5).



Section Properties

Section Name:

Display Section Header On: ☒ Detail Page ☒ Edit Page

Layout

☐ 1-Column ☒ 2-Column

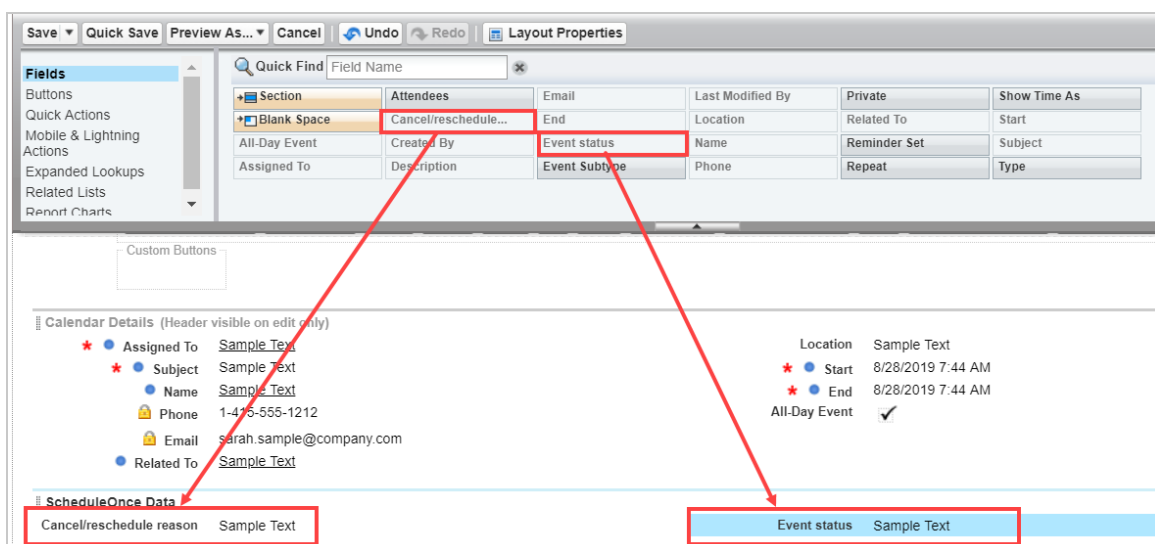
Tab-key Order

☒ Left-Right ☐ Top-Down

OK Cancel

Figure 5: Section Properties pop-up

- Click and drag the **Cancel/reschedule reason** element and drop it in the new section. Do the same with the **Event status** element (Figure 6).



Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts

Quick Find Field Name

Section	Attendees	Email	Last Modified By	Private	Show Time As
Blank Space	Cancel/reschedule...	End	Location	Related To	Start
All-Day Event	Created By	Event status	Name	Reminder Set	Subject
Assigned To	Description	Event Subtype	Phone	Repeat	Type

Custom Buttons

Calendar Details (Header visible on edit only)

Assigned To Sample Text
Subject Sample Text
Name Sample Text
Phone 1-415-555-1212
Email Sarah.sample@company.com
Related To Sample Text

Location Sample Text
Start 8/28/2019 7:44 AM
End 8/28/2019 7:44 AM
All-Day Event ☒

ScheduleOnce Data

Cancel/reschedule reason Sample Text

Event status Sample Text

Figure 6: Add elements to new section

- Click **Save**.
- Go back to the Salesforce setup page in OnceHub.
- After you refresh the page, the **Installation** tab will now be updated to show that you have completed **Step 3: Add Custom fields to the Event page layout** (Figure 7).

Step 3: Add Custom fields to the Event page layout ?

Add the Event status and the Cancel/reschedule reason fields to the Event page layout to enable automatic updates throughout all phases of the booking lifecycle.

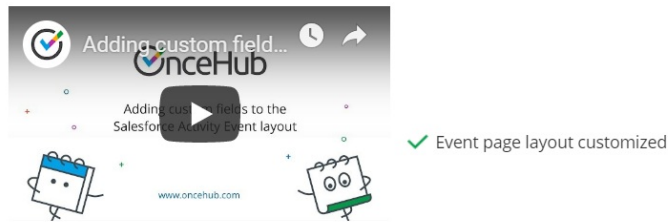


Figure 7: Event page layout customized



Important:

The API User must be connected to OnceHub for the page to update correctly. [Learn more about connecting the Salesforce API User](#)

That's it! You've completed **Step 3** of the Installation phase. You can now click **Continue** to start [mapping OnceHub fields to universally required Salesforce fields](#).