### Salesforce scheduling buttons for Opportunities [Legacy]

Salesforce scheduling buttons provide a quick method to schedule on behalf of a Customer. A schedule button on the Opportunity record allows quick scheduling with the Opportunity's related Contact record. Bookings made via these buttons are automatically added to the Salesforce record that the booking is scheduled from.

Salesforce scheduling buttons can be configured to prepopulate the booking form, or skip it altogether. This is enabled by the optional mapping step in the Salesforce setup wizard, where you can define the mapping between Salesforce record fields and OnceHub Booking form fields.



Figure 1: Schedule with related Contact button

In this article, you'll learn how to add the **Schedule with related Contact** button to the Opportunity record Page Layouts in Salesforce.

#### Requirements

To add the **Schedule with related Contact** button to the Opportunity Page layouts in Salesforce, you will need:

- A Salesforce Administrator for your organization.
- A completed Salesforce connector setup in OnceHub.
- A OnceHub User connected to Salesforce.

### Creating a Contact Lookup field

First, we will add a Lookup custom field to the Opportunity record.

- 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 2).

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Figure 2: Object Manager in the Objects and Fields menu

4. In the **Object Manager** list, select the **Opportunity** object (Figure 3).

SETUP Object Manager 51+ Items, Sorted by Label	
Ltau	Leau
Macro	Macro
Messaging Session	MessagingSession
Messaging User	MessagingEndUser
Namespace Registry	NamespaceRegistry
Opportunity	Opportunity
Opportunity Product	OpportunityLineItem
Order	Order
Order Product	OrderItem

Figure 3: Opportunity in the Object Manager list

5. Select Field & Relationships -> New (Figure 4).

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SETUP > OBJECT MANAGER Opportunity					
Details	Fields & Relation 26 Items, Sorted by Field		Q Quick Find	New Field Dependencies	Set History Tracking
Fields & Relationships	FIELD LABEL	<ul> <li>FIELD NAME</li> </ul>	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Account Name	AccountId	Lookup(Account)		~
Lightning Record Pages	Amount	Amount	Currency(16, 2)		
Buttons, Links, and Actions	Close Date	CloseDate	Date		~
Compact Layouts	Contract	ContractId	Lookup(Contract)		~

Figure 4: Fields & Relationships

6. In the New Custom Field pane, select Lookup Relationship and Next (Figure 5).

New Custom Field	Help for this Page 🥹
Step 1. Choose the field type	Step 1
	Next Cancel
Specify the type of information that the custom field	t will contain.
Data Type	
None Selected	Select one of the data types below.
<ul> <li>Auto Number</li> <li>Formula</li> </ul>	A system-generated sequences onher that uses a display format you define. The number is automatically incremented for each new record. A read-only next that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary	A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
Lookup Relationship	Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
External Lookup Relationship	Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Figure 5: New Custom Field—Step 1

- 7. In the **Related to** drop-down menu, select **Contact**.
- 8. Click Next.
- 9. Enter a label and name for the Lookup field, then click **Next** (Figure 6).
  - Field Label: Contact
  - Field Name: Contact\_ID

Î	New Relationship		Help for this Page 🕑
	Step 3. Enter the label and nam	ne for the lookup field	Step 3 of 6
			Provide: Next Cancel
	Field Label	Contact	
	Field Name		
	Description		
	Help Text		

Figure 6: New Relationship

- 10. In Step 4 and Step 5, click **Next**.
- 11. In Step 6, click **Save**.

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### Creating a button in Salesforce

Now you can create the button to add to the Opportunity Page Layout. The button will retrieve the Contact ID from the custom Contact Lookup field. When clicked, you will be able to make a booking on behalf of the Contact added to that Opportunity.

### i Note:

You can also follow the steps below for Custom objects. In this case, the button and the custom Lookup field should be added to a Custom object instead of the Opportunity Page Layout.

- 1. Go to the **Setup** page.
- 2. In the Platform Tools section, go to Objects and Fields -> Object Manager.
- 3. Select the **Opportunity** object.
- 4. Select Buttons, Links, and Actions -> New Button or Link (Figure 7).

SETUP > OBJECT MANAG	ER	10-21/10-5-5-10					
Details	Buttons, Link 9 Items, Sorted by La		ns	Quick Find	New Action	New Button	or Link
Fields & Relationships	LABEL	NAME	DESCRIPTION	Ν ΤΥΡΕ	CONTENT SOURCE	OVERRIDDEN	
Page Layouts	Add to Campaign	AddInfluence			Standard page		•
Lightning Record Pages Buttons, Links, and	Clone	Clone			Standard page		•
Actions	Delete	Delete			Standard page		•
Compact Layouts Field Sets	Delivery Status	DeliveryStatus		Detail Page Link	URL		•

Figure 7: New Button or Link

- 5. In the **New Button or Link** pane, enter the following information:
  - Label: Schedule with related Contact
  - Name: Schedule\_with\_related\_Contact
  - Description: This button allows you to schedule meetings on behalf of the Contact related to this Opportunity record.
  - Display Type: Detail Page Button
  - Behavior: Display in new window
  - Content Source: URL

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6. Copy the following link and paste it in the large text box (Figure 8).

 $\label{eq:https://go.oncehub.com/EXAMPLEBOOKINGPAGE?so&Skip=1&sfLeadId={!Lead.Id}&sfContactId={!Opportun ity.Contact_IDid_c}&sfCaseId={!Case.Id}$ 

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Custom Button or Link Edit	Save Quick Save Preview Cancel
Label	Schedule with related Con
Name	Schedule_with_related_Cc
Description	This button allows you to schedule meetings on behalf of the Contact related to this Opportunity record.
Display Type	O Detail Page Link View example
	Detail Page Button <u>View example</u>
	List Button View example
Behavior	Display in new window   View Behavior Options
Content Source	URL V
Select Field Type	Insert Field
Opportunity	Insert Merge Field     Insert Operator
This button allows you to schedule me	etings on behalf of the Contact related to this
https://go.oncehub.com/EX	AMPLEBOOKINGPAGE?soSkip=1&sosfLeadId={!Lead.Id}&sosfContactId= dc}&sosfCaseId={!Case.Id}

Figure 8: Paste link in the large text box

7. Replace the placeholder URL (Figure 9) with the Public link of the Booking page or Master page that you want to use for the new button. You can find the Public link in the Booking page Overview section or Master page Overview section.

Select Field Type	Insert Field	
Opportunity	▼ Insert Merge Field ▼ In	nsert Operator 🔻
This button allows you to schedule n	eetings on behalf of the Contact related to this	
	(AMPLEBOOKINGPAGE soSkip=1&sosfLead [dc}&sosfCaseId={!Case.Id}	dId={!Lead.Id}&sosfContactId=

Figure 9: Placeholder URL text

For example, if you want to create a button for a Booking page with the Public link *https://go.oncehub.com/danafisher*, your finished link would be:

https://go.oncehub.com/danafisher?soSkip=1&sosfLeadId={!Lead.Id}&sosfContactId= {!Opportunity.Contact\_IDid\_\_c}&sosfCaseId={!Case.Id}

8. Click Save.

### Adding a button to Salesforce Page Layouts

The next step is to add the new button you've created to the relevant Salesforce Opportunity Page Layouts.

### i Note:

Page Layouts control which buttons are visible. If you want to display the buttons only to specific Salesforce Users, you can assign your Page Layouts to specific Users. Learn more about assigning Page Layouts to Profiles

1. In **Opportunities**, click **Page Layouts** and then select the Layout you want to add a button to (Figure 10).

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SETUP > OBJECT MANAGER Opportunity	
Details	Page Layouts 4 Items, Sorted by Page Layout Name
Fields & Relationships	PAGE LAYOUT NAME
Page Layouts	Opportunity (Marketing) Layout
Lightning Record Pages	Opportunity (Sales) Layout
Buttons, Links, and Actions	
Compact Layouts	Opportunity (Support) Layout
Field Sets	Opportunity Layout
Object Limits	

Figure 10: Page Layouts

2. In the Opportunity Layout editor, select Mobile & Lightning Actions (Figure 11).

Sector Se	11/ <i>1</i> -∧(()
▲ Opportunity Layout ▼	
Details Save VQuick Save Preview As VCancel VIndo Redo	🔳 Layo
Fields & Relationships Fields	8
Buttons         Change Owner         Edit           Page Layouts         Custom Links         Change Record Type         Email	
Page Layouts     Custom Links     Change Record Type     Email       Quick Actions     Clone     File	
Lightning Record Pages Mobile & Lightning Actions Delete Link	
Buttons, Links, and Actions	

*Figure 11: Mobile & Lightning Actions* 

3. Click and drag the **Schedule with related Contact** button to the **Salesforce Mobile and Lightning Experience Actions** section (Figure 12).



Fields	<b>^</b>	Quick Find Mobile	Action Name	0				
Buttons		Change Owner	Edit	Log a Call	New Contact	New Note	Post	Sharii
Custom Links		Change Record Type	Email	Mobile Smart Actions	New Event	New Opportunity	Printable View	Subm
Quick Actions		Clone	File	New Account	New Group	New Task	Question	
Mobile & Lightning Actions		Delete	Link	New Case	New Lead	Poll	Schedule with rel	
	•	Delete	Link	New Case	New Lead	Poll	Schedule with rel	

Figure 12: Add button to Salesforce Mobile and Lightning Experience Actions section

4. Click **Save**.

You're all set! Your button is now ready to use on your Opportunity pages.