

Introduction to Salesforce scheduling buttons [Legacy]

Salesforce scheduling buttons provide a quick method to schedule on behalf of a Customer. Bookings made via these buttons are automatically added to the Salesforce record that the booking is scheduled from.

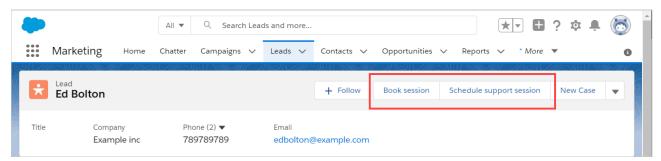


Figure 1: Salesforce scheduling buttons

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.

Creating Salesforce scheduling buttons

You can learn more about creating Salesforce scheduling buttons in the following articles:

- Salesforce scheduling buttons for Contacts, Leads, and Cases
- Salesforce scheduling buttons for Person Accounts
- Salesforce scheduling buttons for Opportunities