Aug 15 2025: Form Submission Objects, New Lightbox Embed, Customer Attachments

Routing Forms

Smart Routing Forms: Prefill and Push Data by Using Form Submission Objects

We're excited to introduce a powerful new enhancement for your **Smart Routing Forms**, making it easier than ever to pre-fill information and pass data to other applications. This new capability, called **Form Submission Objects**, is all about creating automated workflows that save you and your visitors time.

Pre-fill Forms with Data from Other Apps

You can now use **URL parameters to dynamically pass data from other apps** directly into your routing forms.

This is a game-changer for:

- **Sales Reps:** Send personalized pre-filled links in outreach to boost conversions.
- **Marketing Managers:** Improve funnel conversion by creating campaign-specific landing pages with pre-filled marketing data.
- **Customer Success Managers:** Simplify the booking process for known customers by sending them a pre-filled link.
- **Automation Builders:** Connect routing form flows to tools like Zapier or HubSpot, using URL parameters to pass data automatically.

Send Routing Form Data to Your Favorite Tools

Automate data transfer from submitted forms to your favorite apps. Save responses **directly to fields of the Form Submission Object** for easy integration.

This new capability is perfect for:

- **Sales Reps:** Push routing form data into your CRM (like Salesforce or HubSpot) to automatically create or update leads.
- **Marketing Managers:** Send data to tools like Mailchimp to trigger follow-up emails and campaigns.
- **Operations Teams:** Forward data via webhook or API to internal tools, dashboards, or Slack alerts.
- **Support Teams:** Pass form inputs (like issue type) to support tools (e.g., Zendesk) for faster case handling.

By giving you the flexibility to use field names to pass data, we're making it easier to integrate with third-party tools while still using our powerful routing logic.

Who can access it

Plan: Available on **Route** plan and above.

Access Level:

- **Members** can map questions to pre-existing System and Custom fields in their own routing forms.
- **Team managers** can map questions to pre-existing System and Custom fields for their team's routing forms.
- **Admins** and **Account Owners** can create and edit custom Form Submission Fields, and also map them within any user's routing forms.

To leverage this feature, simply go to the routing form editor for the desired routing form and add new questions or map existing ones to custom fields. For detailed instructions on adding questions and mapping fields to your routing forms, please take a look at our **Adding Questions to your Routing Form article**.

Booking Calendars

Lightbox Button Embed For Booking Calendars: A New Way to Book Meetings on Your Website

The Website Button Embed feature is a streamlined way for visitors to book meetings directly from your website. Instead of embedding an inline calendar, this feature uses a special code to open your booking calendar in a clean, modern pop-up window, also known as a **lightbox**.

This ensures that visitors can schedule meetings without navigating away from your page, creating a smoother and less disruptive experience. Additionally, you can customize the color of the pop-up to match your brand for a cohesive look.

Why it matters

The feature empowers you to integrate your **Booking Calendar** in a way that feels more natural and less intrusive on your website. It's a great fit for anyone managing a web presence, from small business owners and marketing managers to sales and customer support teams.

- **Enhanced Website Integration:** Your Booking Calendar can now feel more seamless and less intrusive within your website design.
- **Improved User Experience for Visitors:** Provide a smoother, less disruptive booking flow for your website visitors, as the booking process appears in a clean overlay without navigating away from your main page.
- **Design Consistency:** Match the lightbox's color to your brand for cohesive styling that complements your existing buttons or links.
- **Increased Conversion Rates:** A cleaner and visually attractive booking flow can lead to higher engagement and more confirmed meetings.

Who can access it

Plan: Available on **Schedule** plan and above.

Access Level:

- **Members** can use this embed option for their own Booking Calendars.
- **Team managers** can access this feature on any Booking Calendar owned by a member of their Team.
- **Admins** and **Account Owners** can access this feature on any Booking Calendar in the account.

For detailed instructions on embedding your Booking Calendar, please take a look at our **How to Embed your Booking Calendar on Your Website article**.

Customer Attachments For Booking Calendars: Accept Files Directly With Your Bookings

OnceHub now supports file uploads through **Booking Calendars**, enabling you to collect essential documents from clients and candidates directly. Guests can attach up to five files per booking, with a maximum size of 10 MB each. This feature is ideal for recruiters needing resumes or consultants requesting background information.

Files are conveniently downloadable as a **single compressed ZIP archive**, simplifying access and saving time by eliminating the need to download each file individually.

Why it matters

The new file upload feature helps you prepare more effectively for scheduled meetings by allowing you to collect necessary documents and pre-meeting information directly during the booking process. This is particularly useful in industries like recruitment and consulting.

- **Streamlined Information Gathering:** Allows for the collection of necessary documents and pre-meeting information directly during the booking process.
- **Efficient Workflow:** Consolidates the collection of important files, leading to a more effective and informed meeting experience.

Who can access it

Plan: Available on **Schedule** plan and above.

Access Level:

- **Members** can add this question to their own booking calendars, provided they are the host and have the authority to edit the booking form.
- **Team managers** can enable this option for booking calendars hosted by their team members.
- **Admins** and **Account Owners** have the ability to update this setting for any user or booking calendar on their account.

To begin using this feature, simply go to the booking form editor for the desired booking calendar and add the file upload question. For detailed instruction on customizing booking forms, please take a look at our **Booking Calendar Booking Forms article**.