

ScheduleOnce Integration

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Overview

[ScheduleOnce](#) is an "end-to-end solution for scheduling with prospects and customers through all phases of the customer lifecycle." They offer connections to all major calendar services, and also integrate with most major CRMs, including Salesforce.

With FormAssembly, you can create a form that will automatically redirect your respondents to ScheduleOnce upon completion, and pass along submission information or Salesforce record IDs in the process.

This means that you can use your FormAssembly form to send information through all of our integrations, in addition to being able to let your respondents easily set up bookings through ScheduleOnce.

Getting Started

If you are not already familiar with FormAssembly redirect links, we recommend [starting with this help document](#). You will be working with redirect links to set up this integration.

In general, you will be using the FormAssembly redirect link to pass form submission information to ScheduleOnce. We'll also look at how you can pass a Salesforce record ID to ScheduleOnce, so that ScheduleOnce can pull in information to the booking based on the record ID.

Before setting up this integration, make sure you have completed building the form you will be using to pass information along to ScheduleOnce.

You will also need to be logged into your ScheduleOnce account, and if you are planning on working with Salesforce, you will need to have the [ScheduleOnce Salesforce integration completely set up](#).

Setting up Your Redirect Link to Pass URL Parameters

For this first example, we will discuss how you can use your redirect link to pass along the respondent's name and email through the URL to the ScheduleOnce booking.

1. To begin, navigate to your ScheduleOnce account and open the Booking Page you would like to redirect your form respondents to. You can [check out this ScheduleOnce documentation for assistance](#).
2. Under **Share & Publish** in your Booking Page, you should see the option to "share dynamic links". Click this option to continue.
3. Under **Merging Customer Data** select "Personalized Link (URL parameters)".
4. Copy the generated link.
5. Navigate back to your form and open the Notifications Page. Paste the copied link in the Redirect URL field.
6. Next, you will need to replace the "ADD_DYNAMIC_FIELD" parts of the link with the field aliases from your form that represent the name and email fields. You can add these aliases using our [field editor](#).

Your final link will be similar to this:

```
https://meetme.so/DemoBooking?name=%%tfa_1%%&email=%%tfa_2%%&skip=1
```

Please Note: You can remove the `&skip=1` at the end of the URL if you would like your respondents to skip the booking form. In general, adding `&skip=1` to the end makes for a faster booking process, since respondents will not need to interact with the booking form.

Setting up your Redirect Link to Pass a Salesforce Record ID

Rather than passing a name and email through the URL, you can also choose to pass a Salesforce Lead ID, Contact ID, or Case ID. This information can then be used to connect the ScheduleOnce booking to a Salesforce Record.

Prior to setting this integration up, you will need to have connected [Salesforce to your ScheduleOnce account](#) as well.

Additionally, you will need to have a [Salesforce connector](#) set up and enabled within FormAssembly with either a Lead, Case, or Contact being created/updated. This connector will need to be added to the **Form Submitted** portion of the connector timeline.

1. To begin, navigate to your ScheduleOnce account and open the Booking Page you would like to redirect your form respondents to. [You can check out this ScheduleOnce documentation for assistance](#).

2. Under Share & Publish in your Booking Page, you should see the option to "share dynamic links". Click this option to continue.

3. Under Merging Customer Data select "Personalized Link (Salesforce ID)". Then you will have the option to either skip the booking form (recommended for a faster experience) or prepopulate the booking form (recommended if you want respondents to confirm their information).

4. Next, copy the link that is provided under the **Copy Link** step. It will look similar to this:

```
https://meetme.so/DemoBooking?soSkip=1&sofLeadId={!Lead.Id}&sofContactId={!Contact.Id}&sofCaseId={!Case.Id}
```

5. Navigate back to your form's Notifications Page and paste the link in the Redirect URL field.

6. Now you will need to replace either the `{!Lead.Id}`, `{Contact.Id}`, or `{!Case.Id}` with the [Salesforce Object Alias](#).

This will be either `%%SFA_LEAD%%`, `%%SFA_CONTACT%%`, or `%%SFA_CASE%%` depending on which record ID you are wanting to pass to ScheduleOnce. You can leave the remainder IDs as they are in the link.

For example, if you had your FormAssembly Salesforce connector set to create a new Lead every time the form was submitted, and you wanted to pass that Lead ID on to ScheduleOnce, your link would look like this:

```
https://meetme.so/DemoBooking?soSkip=1&sofLeadId=%%SFA_LEAD%%&sofContactId={!Contact.Id}&sofCaseId={!Case.Id}
```

Where the `{!Lead.Id}` is replaced by `%%SFA_LEAD%%` and the `{!Contact.Id}` and `{!Case.Id}` left as they are. By leaving the `{!Contact.Id}` and `{!Case.Id}` they will simply not pass along any values, and ScheduleOnce will use the Lead ID that is passed to lookup the Salesforce record.

6. Once you have your link created, click **apply** at the bottom, and you're all set!
