Coconut's Salesforce Integrations

Reduce manual tasks and duplicate data, increase accuracy.

Compatible with SFDC Sales & Service Clouds

Get an end-to-end view of your customer engagement data using Salesforce with Coconut Software. Our integration closes the CRM loop for your appointments by syncing appointment booking data with Salesforce leads, contacts, activities, and campaigns.

Our SFDC API integration is a one-way synchronization between Coconut and SFDC and focuses on keeping appointment and client data up-to-date in Salesforce.

If you'd prefer a two way synchronization, our Salesforce Component is right for your organization. The Component allows you to embed Coconut directly in Salesforce and lets you manage your appointments without having to log into Coconut.

WHAT IT DOES

This integration eliminates the manual process of creating leads in Salesforce - instead they are automatically created by Coconut when an appointment is booked. For existing clients, Coconut will match them and ensure the appointment is tied to the existing Salesforce account. This seamless data collection means an improvement in accuracy and reduces the risk of duplicate data.

Additionally, appointments can be updated, rescheduled or cancelled in Coconut or Salesforce and the change will be synchronized to the other system.

Our integrations allow users to:

- See upcoming and historical appointments within leads or accounts in Salesforce.
- Collect additional appointment data through booking and sync to Salesforce record.
- Map custom questions to custom fields to help fill in details in leads/accounts.

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ONE WAY (API) VERSUS TWO WAY INTEGRATION (COMPONENT)

HOW IT WORKS

In the API integration, for new Salesforce leads, contacts, and events created in Salesforce and updates of existing leads, contacts and events in Salesforce are not synced into Coconut as this is only a one way integration. Changes in Coconut to leads and contacts are not updated in Salesforce. The lead/contact in Salesforce is considered the source of truth, so any updates to clients in Coconut are not sent to Salesforce.

For the Component integration, data flows bilaterally and will keep both systems up to date with leads created from bookings, regardless of how and where the appointment was booked or changed.

Harness the power of Salesforce in Coconut by implementing one of our integrations - easy, configurable, and automated.

When an appointment is booked in Coconut, through the staff view or through the client view, Coconut takes the client first name, last name, and email address and checks if there is a lead or contact in Salesforce that matches the same name and email. If no match is found , Coconut creates a lead in Salesforce with the client details, using the mappings as defined by your administrator. If a match is found, a new event is created under the matching lead/account.

Contact us to learn more about our integrations.
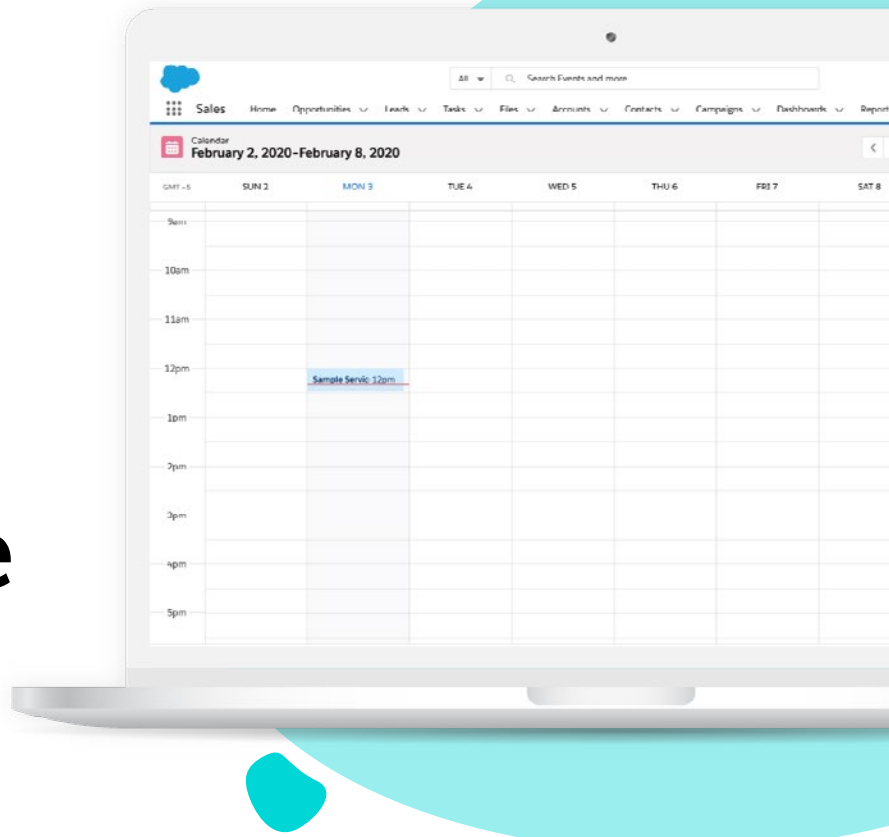
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SCHEDULE A CONSULTATION

About Coconut Software

Our cloud-based appointment scheduling and visitor management platform combines your on-location and digital channels, providing self-service booking and curbside pickup, online and physical queuing, wait time tracking, callback requests and virtual meeting support as well as contact center integration.