Seamlessly Manage Appointments with Coconut's Salesforce Integration

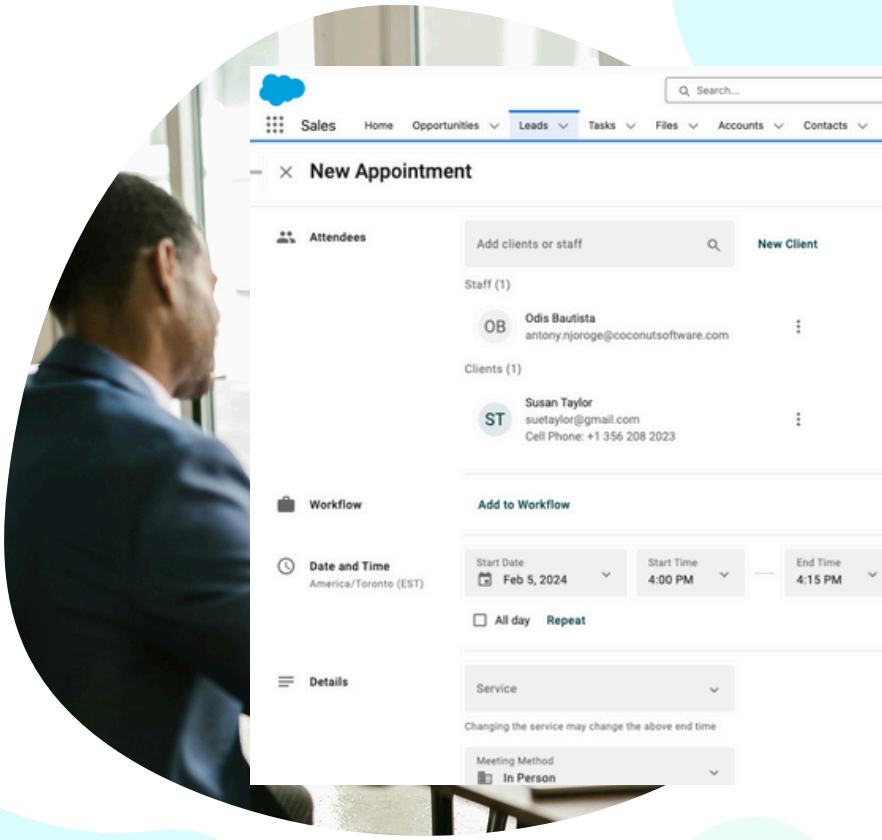
Coconut’s Salesforce integration streamlines appointment workflows by embedding advanced scheduling directly into Salesforce. This enables advisors to efficiently manage their schedules, build stronger client relationships, and maximize overall productivity.

With real-time data sync and enriched client insights, your institution gains actionable intelligence to boost engagement and drive measurable outcomes.

Key Advantages:

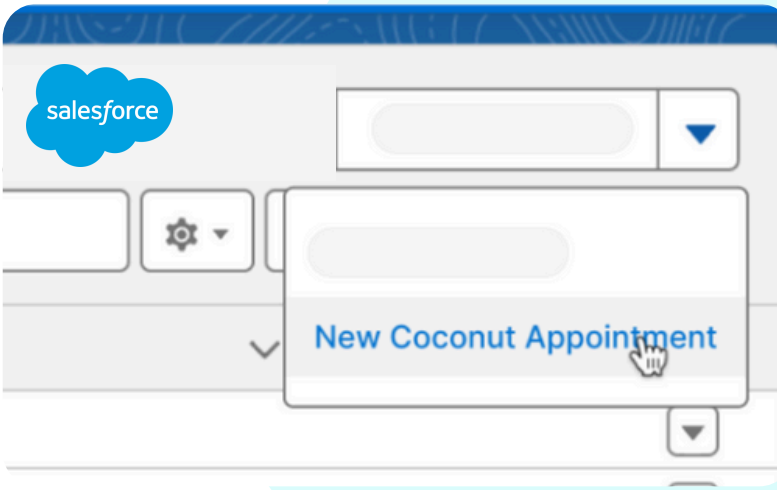
- Streamline advisor workflows
- Enrich your Salesforce CRM data
- Unlock actionable insights
- Enhance your Salesforce reports

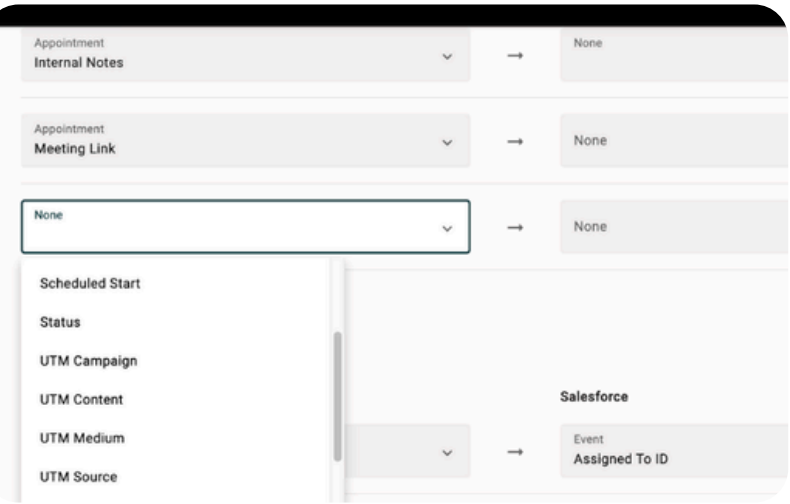
Empower Your Advisors with Integrated Scheduling



Streamline Advisor Workflows

- **Effortless Appointment Booking:** Book new appointments in Salesforce with pre-filled member details, assigning services, dates, staff, and times seamlessly.
- **Comprehensive Appointment Management:** Manage appointments by rescheduling, canceling, or marking no-shows with synced calendar updates.





Enrich Your Salesforce CRM Data

- **Two-Way Data Sync:** Sync Coconut appointment bookings, updates, and cancellations in real time to ensure accurate and consistent data across systems.
- **Customizable Field Mappings:** Configure fields for staff, services, locations, marketing UTMs, and more. Match data to leads, contacts, or person accounts.

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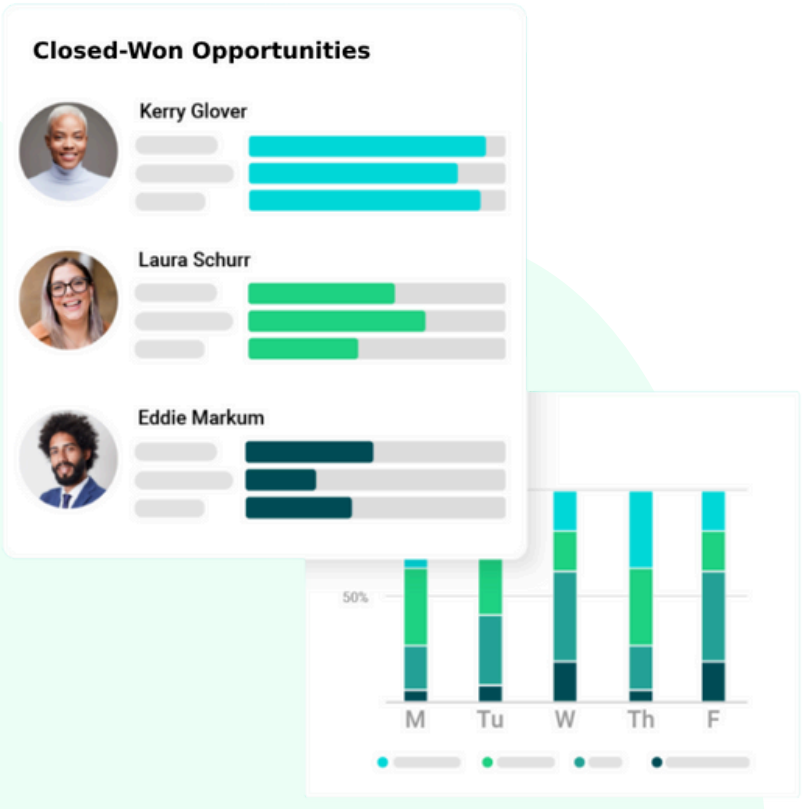
Unlock Actionable Insights

- **Pre- and Post-Meeting Data:** Sync meeting details, preferences, and outcomes to Salesforce records for a complete client view and improved service.
- **Contextual Client Engagement:** Equip advisors with enriched records that summarize client interactions, enabling personalized follow-ups and better engagement.



Optimize Reporting with Coconut Data

- **Aggregate Appointment Metrics:** Analyze company-wide trends in appointment volume and meeting outcomes for operational insights.
- **Appointment Analytics:** Use Coconut appointment data directly in Salesforce reports to measure staff impact and sales outcomes.

SALESFORCE INTEGRATION—FEATURE OVERVIEW

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EMBEDDED SCHEDULING IN SALESFORCE

Advisors can schedule, reschedule, and cancel meetings directly in Salesforce, staying productive without switching platforms.

TWO-WAY DATA SYNC

Sync appointment bookings, updates, and cancellations between Salesforce and Coconut to maintain consistent and accurate records.

INTEGRATED CALENDAR SCHEDULING

Automatically sync events across Salesforce, Outlook, and Google to ensure schedules are consistent and avoid double bookings.

AUTOMATIC RECORD CREATION

Automatically create new leads, contacts, or accounts in Salesforce for first-time clients, ensuring no opportunities are missed.

APPOINTMENT INSIGHTS IN SALESFORCE

Build reports directly in Salesforce to analyze appointment trends, no-show rates, and outcomes for data-driven decision-making.

FLEXIBLE FIELD MAPPING

Customize how data fields sync between Coconut and Salesforce, ensuring accurate alignment for staff, services, and client records.

INTUITIVE BOOKING INTERFACE

Simplify scheduling workflows by reducing manual tasks, enabling advisors to efficiently book, manage, and follow up on appointments.

CONFIGURABLE CLIENT MATCHING

Prevent duplicate records by setting rules to match client data (e.g., name, email, phone), ensuring data accuracy and workflows.

CUSTOMIZABLE ADVISOR DASHBOARDS

Provide advisors with dashboards to view, manage, and prioritize upcoming appointments for better time management and client service.

PRE AND POST-MEETING DATA

Add meeting details, contextual information, and outcomes to Salesforce, creating a full view of client interactions and engagement.