

Contacts in ChatOnce

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Every website visitor who engages with your bot has a contact record. This record stores data in fields you've defined in OnceHub, along with system default fields such as name, email, and company.

ChatOnce keeps this information in mind as repeat visitors engage with your website in future, personalizing the experience to their perspective.

Saving answers as contact fields

For instance, you ask them how many team members their company has and save this to their **Company size** contact field. You can even specify that the bot should skip this question if they already answered this question in another interaction, whether in this bot's conversation or another.

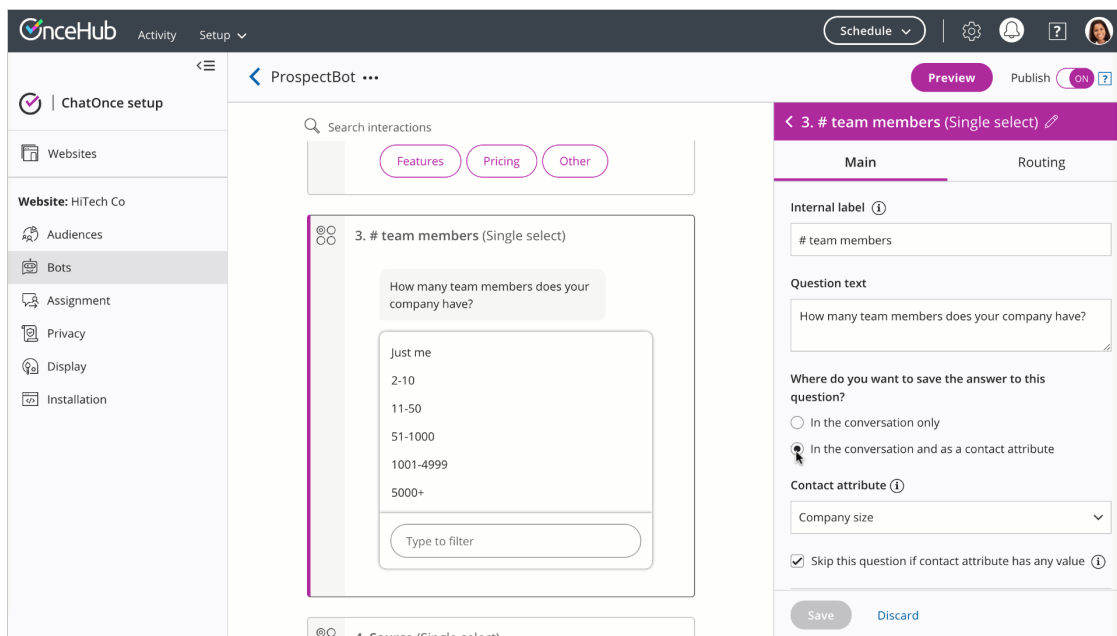


Figure 1: Saving an answer as a contact field

If the bot recognizes them from a past interaction, you can use their contact fields to target the right audience (for instance, skip them entirely) and route the conversation efficiently, for the best audience experience.

If ChatOnce identifies a visitor from a previous interaction, it can consider their already-saved contact fields while routing the visitor through the defined interactions.

Select **Skip this question if contact field has any value** (Figure 1) to skip the question entirely.

Routing based on contact fields

To route to a specific question based on their existing contact fields, go to the **Routing** tab of an interaction. Select **Route to interactions based on rules**. For the If step, select **Contact field** and choose which contact field to use.

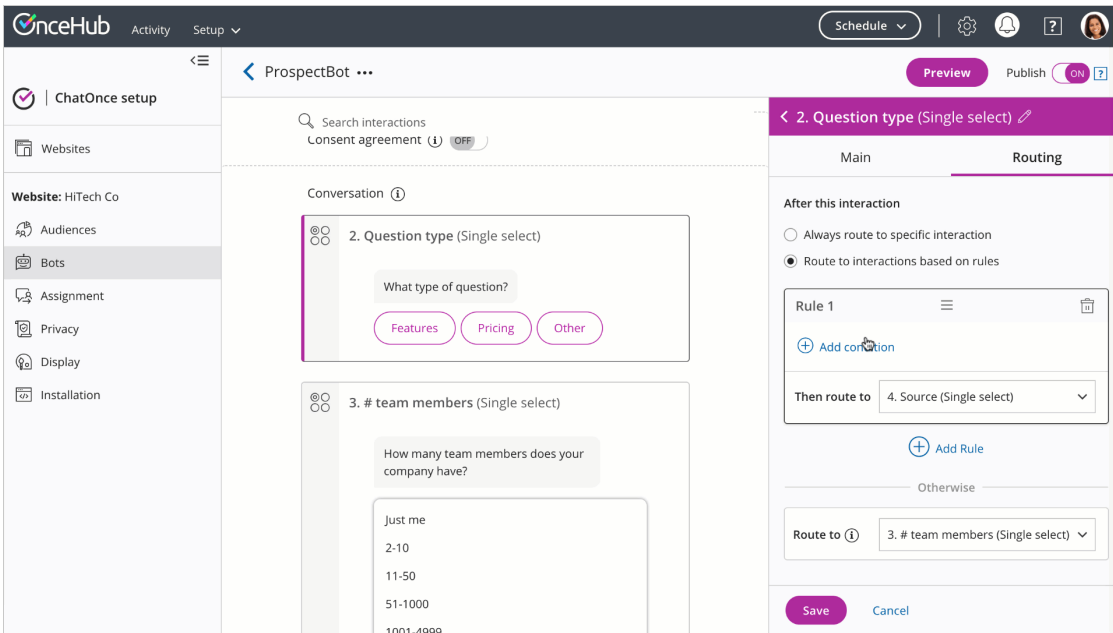


Figure 2: Routing based on rules - Contact field

[Learn more about routing](#)

Reviewing contact information

You can see contact information displayed as you view conversations in the Activity stream. In the top menu, select **Activity**.

The activity includes all contact information captured, recent page views, and recent activity for that contact. This information gives you a snapshot of the contact and their engagement with your website.

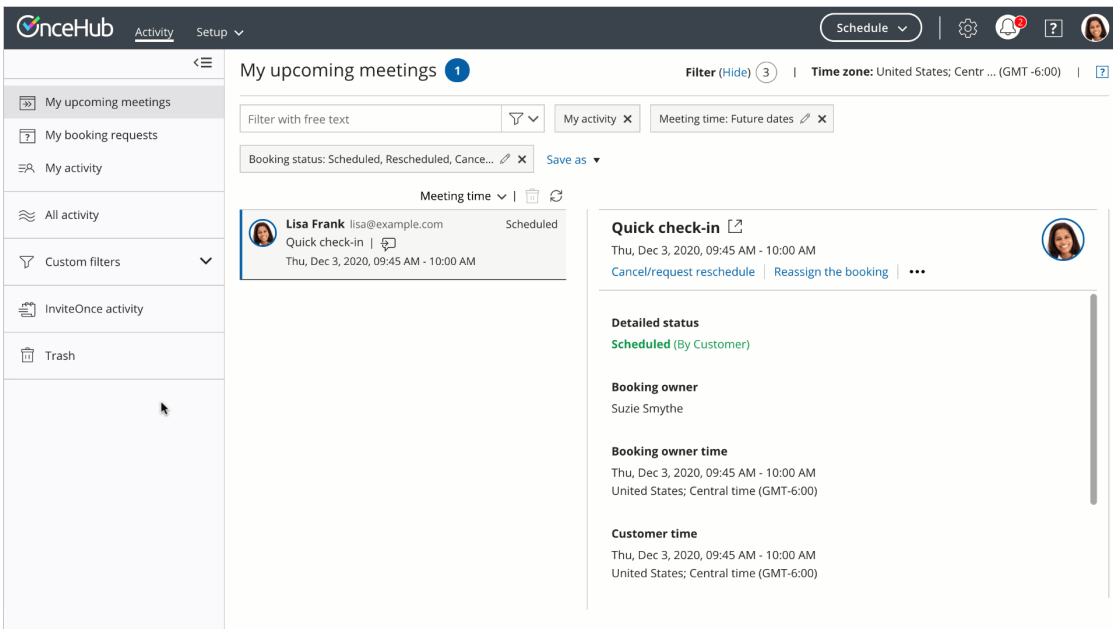


Figure 3: My activity filter

Filter the Activity stream to display the activities you want. If you have a filter you'll want to review regularly, you can save it as a custom filter.

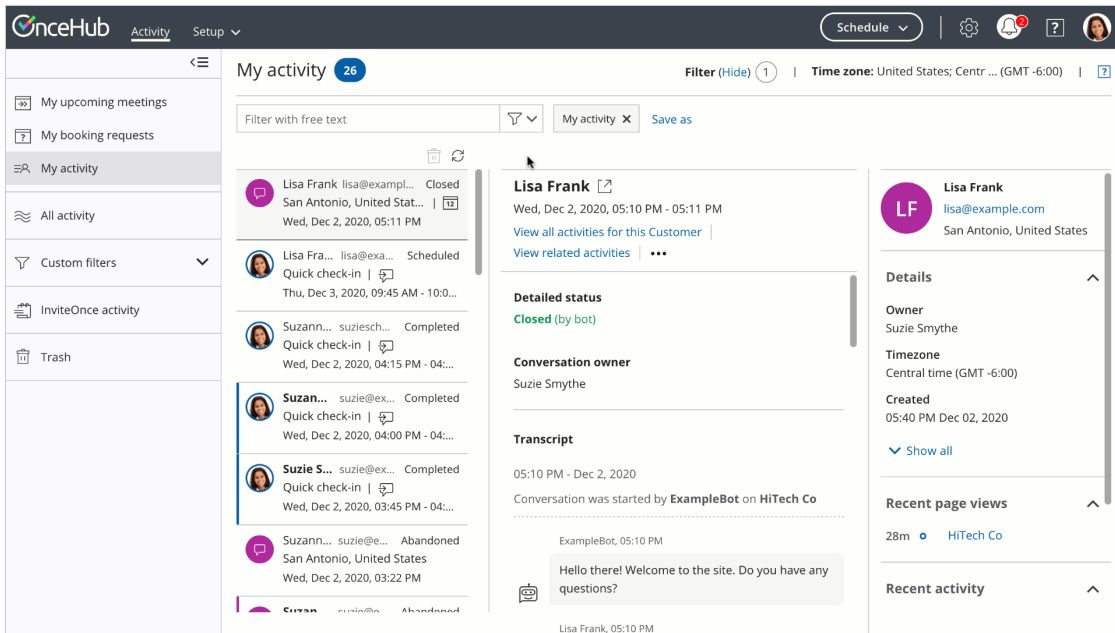


Figure 4: Create a custom filter - Conversations with bookings

On the contact's activity record, you can review multiple things, including:

Information retrieved from a contact

This may include name, email, company, etc.

They may have submitted this information through a ChatOnce conversation or ScheduleOnce booking form.

Contact status

You can define one of four preset statuses for each contact:

- Qualified
- Marketing qualified
- Sales qualified
- Disqualified

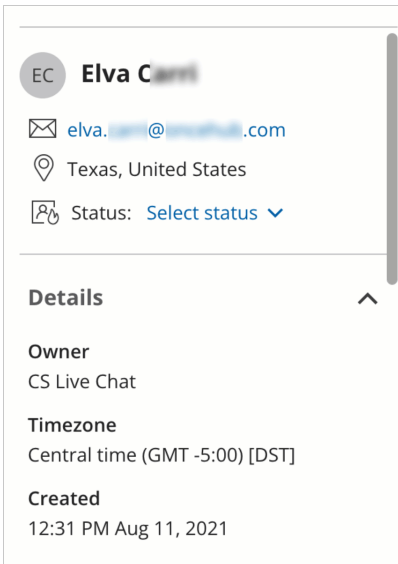


Figure 5: Contact status

The contact status can be defined in a couple ways:

- Adding the **Contact status** action to the [bot conversation](#), or
- Updating it manually in your activity stream

By indicating a status for the contact, you can set other processes in motion on your end based on that status. You can also use this data to optimize your bot flow, determining the efficiency of your campaigns with different bots, audiences, and other factors.

Behavior on your website

As visitors navigate your website, they may spend 14 seconds on the home page, 25 seconds on the pricing page, and so on. Perhaps they return two more times to review the pricing page. Their behavior can indicate how engaged they may be with your organization. ChatOnce displays this in the activity, alongside their contact information.

This functionality may be contingent on granted consent. [Learn more](#)

All past interactions with OnceHub

Whether they engaged in a conversation with a ChatOnce bot or booked a meeting through ScheduleOnce, their contact record has a full history of all interactions, no matter the OnceHub User assigned to that interaction.

With an understanding of the past meetings they've had, how they've replied to a bot, and more, you will have a clearer picture of their interest in your organization, along with their needs and expectations.