

Contacts in OnceHub

Last Modified on Aug 28, 2024

OnceHub saves customers that schedule meetings with you as contacts.

You can view all information about one of your contacts in the Activity stream, providing you with a full view of information related to each customer or website visitor before taking action.

Each contact has attributes that can be stored in contact fields, which can be customized. You can export all contacts to a CSV file.

How do contacts work in OnceHub?

When a customer books a meeting using Booking pages or a website visitor engages with your chatbot or form, OnceHub creates an activity for them on the Activity screen. OnceHub allows you to see all that contact's activities together, so you'll have a full view of information related to them before taking action.

The contact is identified through their email address, if this is known for them (as it would be for all scheduled bookings and some chatbot conversations and form submissions). OnceHub groups all activities related to that email address together when you go to the three-dots menu for an activity and select **View all activities related to this Customer**.

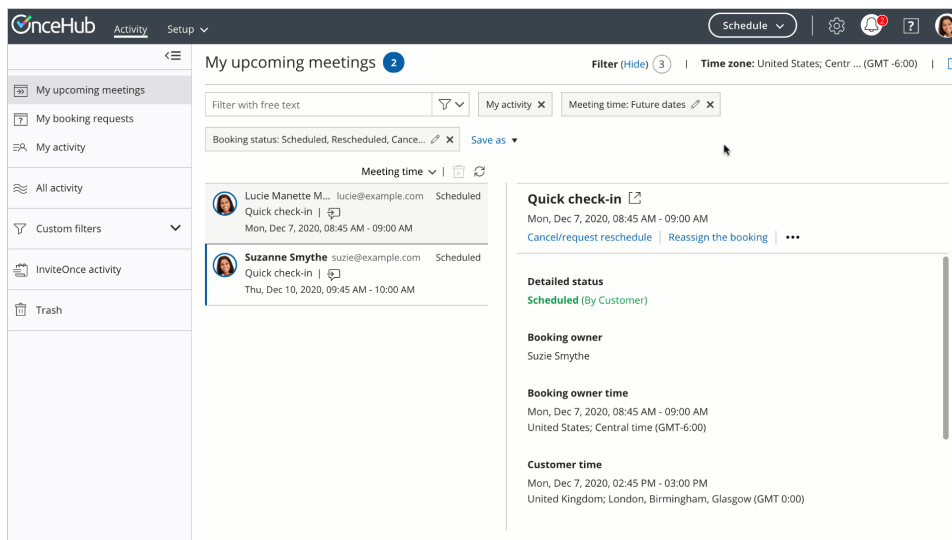


Figure 1: View all activities related to this Customer

In the activity stream, Admins have access to see all contacts in the account. A Member user can view any contacts for which they are the owner.

How to gather contact attributes

Booking pages

When someone books with you, they fill out your booking form. When you [create your booking form](#), you can specify which answers should be mapped to their contact record as saved contact attributes.

Fields mapped by default

Every contact has, at minimum, a first name and email. These two fields are always saved as contact fields. Their mapping cannot be edited.

Other fields are also mapped by default but are optional to include. However, their mapping cannot be edited. For instance, if you opt to use the **Your company** field in your booking form, it will always map to the **Company name** contact field.

Other fields can be mapped to a different contact field, if you prefer.

Booking form field	Mapped to Contact field	Mandatory contact field?	Mapping can be edited?
Your name	First name	Yes	No
Your email	Email address	Yes	No
Your company	Company name	No	No
Your phone	Phone	No	No
Your mobile phone	Mobile phone	No	No

Fields not mapped by default

None of these fields are mandatory and mapping for all can be edited:

- Your company - A second company field that is optional and can be mapped
- Attachment
- Country
- Location
- State
- Terms of service

Custom contact fields

All custom fields in your booking form are optional and entirely flexible for mapping to whichever contact field you prefer.

You will need to create a new contact field before you can map a custom field in your booking form to it. In the top navigation menu, select the gear icon → **Contact fields** → **Add new field** to add a custom contact field.

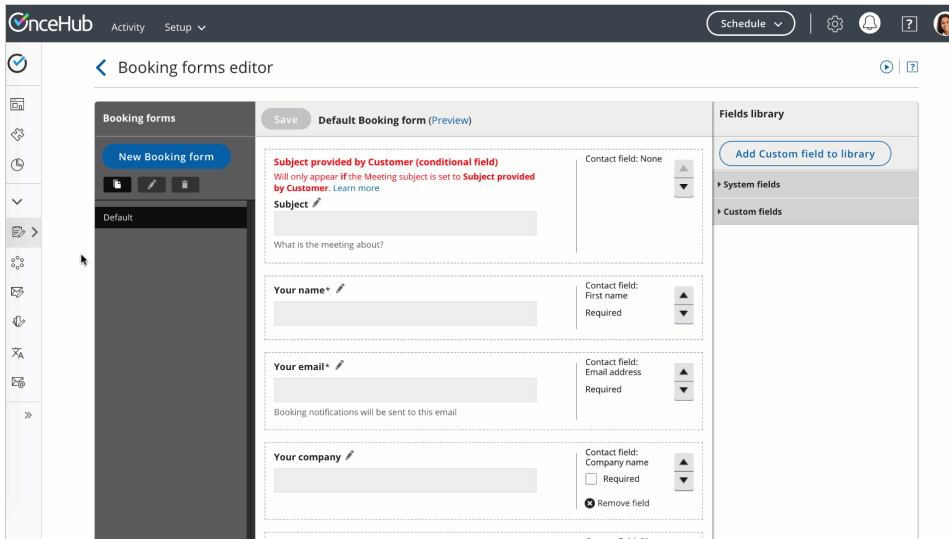


Figure 2: Add new field

Chatbots

Every website visitor who engages with your chatbot 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.

If their name is unknown because they haven't provided it yet, OnceHub assigns the default contact name **Site visitor**.

[Learn more about contact fields using chatbots](#)

Export contacts

To export a CSV file of your contacts, go to the lefthand menu → Contacts icon → Export CSV.

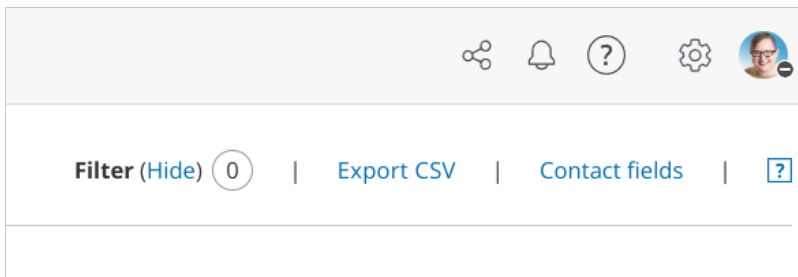


Figure 3: Export CSV



Note:

Only [OnceHub administrators](#) can export contacts.