OnceHub Support

Sync contacts with your CRM

Last Modified on Dec 4, 2022

You can sync contacts and bookings from chatbots and forms to your CRM.

Note:

This integration currently supports syncing contacts to Salesforce and Hubspot.

Our integration from chatbots and forms to Salesforce is a separate connection than our integration from booking pages to Salesforce. If you'd like to sync both, you can connect both integrations.

If you use a different CRM than Salesforce or Hubspot, you may be able to sync contacts to your CRM with our Zapier integration instead.

Skip ahead to:

Stay on top of the sales cycle

If you engage with leads through chatbots or forms, you can track those visitors by creating and updating records in your CRM. Whether they book an appointment with you or simply engage with a chatbot, you'll keep significant interactions visible on your end, with nothing slipping through the cracks. With all relevant contacts synced to your CRM, you'll be able to gather and accelerate more leads for your organization.

You can choose to sync all leads or only qualified leads, based on their level of engagement or specific answers they provide during the interaction. When the contact syncs, your CRM fields will update with relevant data gathered during their chatbot or forms interactions.

Sync from chatbots or forms to your CRM

Our integration connects to Lead objects, Contact objects, and Events in your CRM.

Contacts sync based on the email they provide during an interaction (chatbot or form conversation, or previous bookings). Once you've collected their email, this will either create a new record or, if your Salesforce account recognizes the contact's email, update the current lead or contact record.

1. Click on the **Account** menu (the gear icon in the bottom left corner).
2. On the **CRM** page **→ Chatbots and Forms CRM integrations**, find **Salesforce** or **Hubspot** and click **Start**.
3. Follow the directions to connect your Salesforce or Hubspot account to OnceHub.
4. Map the fields you wish to sync according to your organization's needs. Each drop-down menu included on this step displays all the relevant OnceHub fields you can map to the relevant Salesforce field. See details below
5. OnceHub syncs contacts to your CRM under two circumstances:
    1. A Sync contact interaction on your chatbot or form is triggered. You can add a Sync Contact interaction to your chatbot or form conversation at **Chatbot/Forms →** relevant chatbot/form **→ Add interaction → Actions → Sync Contact** (Figure 1). See details below
    2. Someone schedules a meeting through a Schedule action interaction on your chatbot or form. See details on scheduling with your chatbot and your form.

Mapping fields

Note:

Once you map your fields, your CRM configuration will be set. If you'd like to update the mapping again, you should disconnect, reconnect, and redo mapping for the integration.

The minimum requirement for syncing to your CRM is a captured email address. Depending on your CRM, the email will create or update a lead and/or contact record.

If you have other mandatory fields in your CRM and you do not map a OnceHub field to it, that field will stay blank in your CRM.

Mapping to Salesforce

Action	Salesforce
Create new leads	When a lead does not exist based on the provided email, map to these fields.
Update existing leads	When a lead exists based on the provided email, map to these fields.
Update existing contacts	When a contact exists based on the provided email, map to these fields. Only displays if you have custom contact fields in Salesforce.

Create new events	When an event does not exist because this is a new booking, map to these fields. For **Cancel/reschedule reason**, select **Cancel Reschedule Information Reason**. For **Event status**, select **Status**.
Update existing events	When an event exists based on the relevant booking, map to these fields. For **Cancel/reschedule reason**, select **Cancel Reschedule Information Reason**. For **Event status**, select **Status**.

Mapping to Hubspot

Action	Hubspot
Create new contacts	When a contact does not exist based on the provided email, map to these fields.
Update existing contact	When a contact exists based on the provided email, map to these fields.

Field type compatibility

OnceHub contact field type	Salesforce field type	Hubspot field type
Text (long)	Text, Text Area	Multi-line text
Text (short)	Text, Text Area	Single-line text
Number	Number, Text	Number
Date	Date, Text	Date picker
Time	Time, Text	Date picker

DateTime	Date/Time, Text	Date picker
Phone number	Phone, Text	Phone number
Picklist (single)	Picklist (single) (the value must exist in the field's value set), Text	Single-line text
Picklist (multi)	Picklist (multi) (the values must exist in the field's value set), Text	Multiple checkboxes, Single-line text
Email	Email	Single-line text
True/False	Checkbox, Single-line text, Picklist with True/False values	Single checkbox

Contact ownership

New contacts or leads are assigned ownership automatically, based on the user email of the contact owner in OnceHub. Note that the email **must** be the same as your CRM account email (**cannot** be an alias email).

For any existing contacts and leads, our integration keeps the current owner in your CRM as-is, with no changes to ownership.

If your OnceHub user email is different than your CRM account (**cannot** be an alias email), your CRM admin can assign ownership manually.

Add syncing to your bots and forms

Any of your bot conversations can receive contact information and sync that data to your CRM. If you'd like to sync all contacts who have provided an email, add the Sync Contact interaction immediately after the Email question.

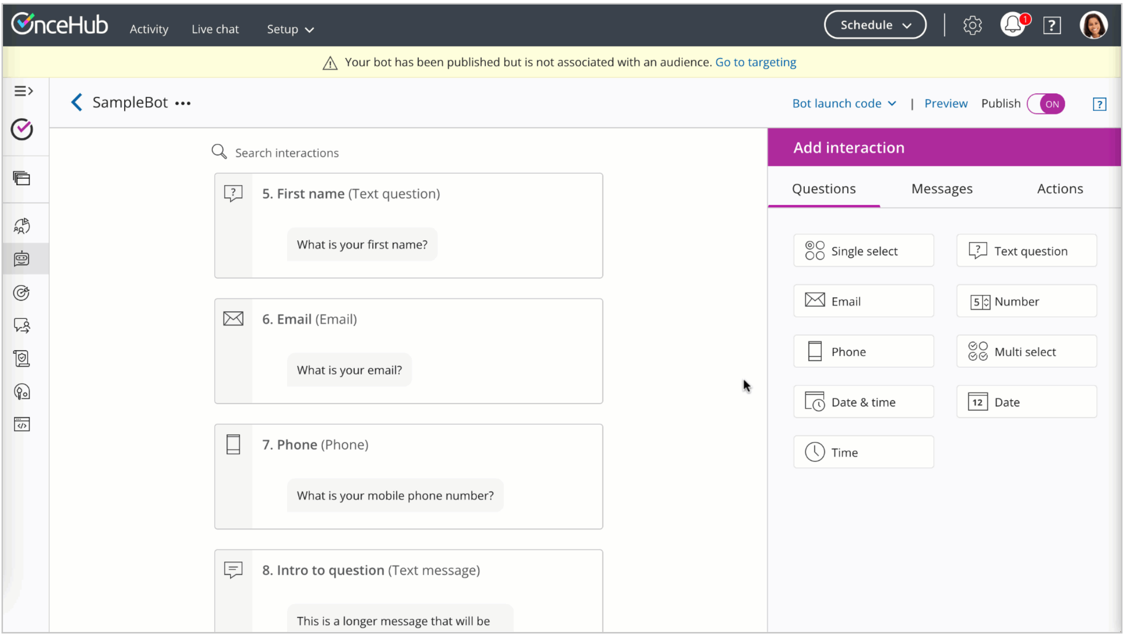

Figure 1: Add Sync Contact interaction

If you don't want to sync all contact interactions to your CRM, you can add the Sync Contact interaction after the specific interaction that qualifies them. For instance, you may want to route to the Sync Contacts interaction only when visitors meet a certain threshold, qualifying them as a high-value prospect.

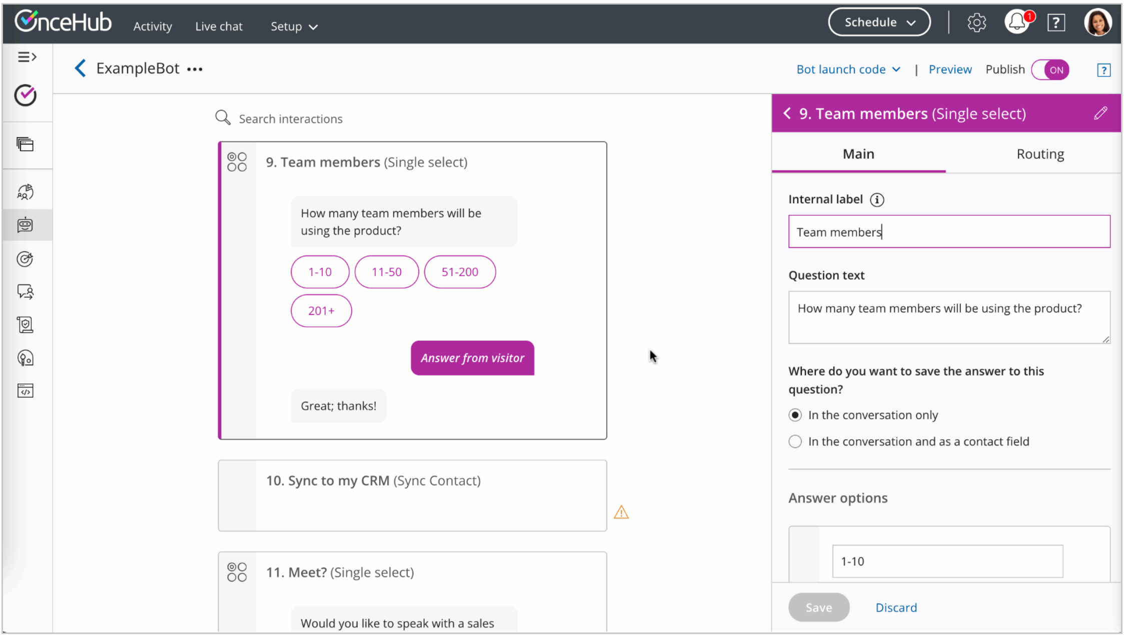

Figure 2: Add routing from qualifying interaction to Sync Contact interaction

You can then return to the Sync Contact interaction and route to the next relevant interaction for that type of prospect.