

Frequently asked questions for the dashboard

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How does my dashboard calculate time to engagement?

Your dashboard calculates time to engagement as follows:

Live chat: The time from initial lead capture to the start of a live chat conversation.

Scheduled meeting: The time from initial lead capture to the start time for a scheduled meeting.

Note that the time to engagement for a scheduled meeting is based on when the meeting is due to happen, rather than when it was confirmed. It does not include scheduled meetings that have been canceled or marked as no-shows.

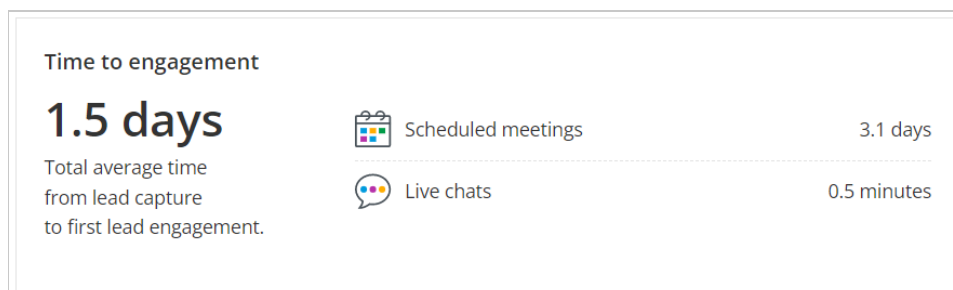


Figure 1: Time to engagement

Learn more about [reviewing your dashboard](#).

How does my dashboard calculate visitors seen?

Your dashboard calculates visitors seen as follows:

Booking pages: The total number of visitors to pages that included a standalone, pop-up, or embedded booking page.

Chatbots: The total number of visitors to pages that included a standalone, pop-up, or targeted bot.

Forms: The total number of visitors to pages that included a standalone, pop-up, or embedded form.

Note that a visitor may have been seen by your booking pages, chatbots, or forms but that doesn't mean they interacted with them.

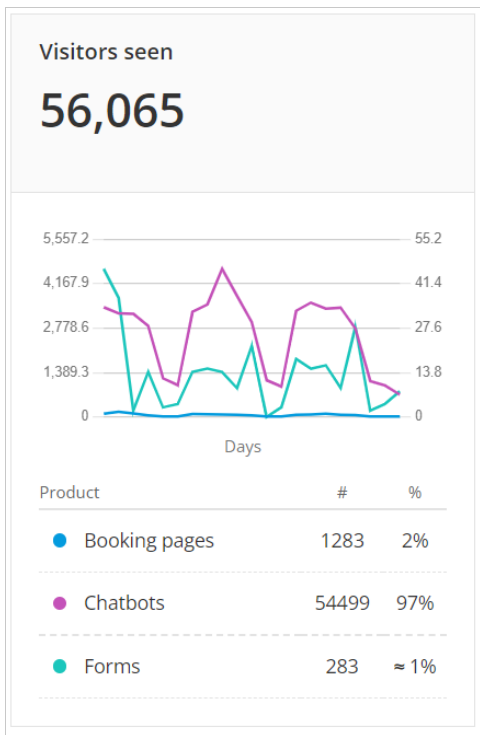


Figure 2: Visitors seen

Learn more about [reviewing your dashboard](#).

How does my dashboard calculate new leads captured?

Your dashboard calculates new leads captured as follows:

Booking pages: The total number of new leads who scheduled a meeting through a booking page.

Chatbots: The total number of new leads who entered their email or phone number in a bot.

Forms: The total number of new leads who entered their email or phone number in a form.

Note that new leads captured will not include leads who have previously entered their email or phone number in a booking page, chatbot or form.

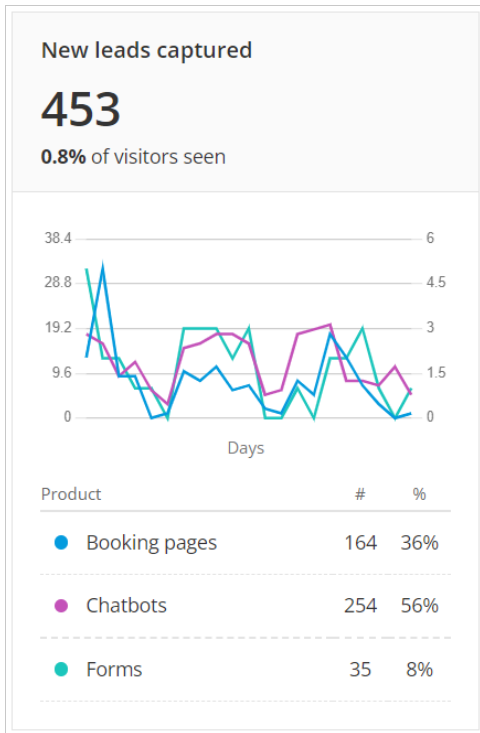


Figure 3: New leads captured

Learn more about [reviewing your dashboard](#).

How do I update the qualification status of my contacts?

All contacts in OnceHub are assigned one of the following qualification statuses:

- Qualified
- Marketing qualified
- Sales qualified
- Disqualified
- No status (default)

Automatically updating the qualification status for a contact

Chatbots and forms can automatically update the qualification status by using the contact status action. For example, when a visitor has answered the qualification questions, you can decide whether their status should be updated to qualified or disqualified.

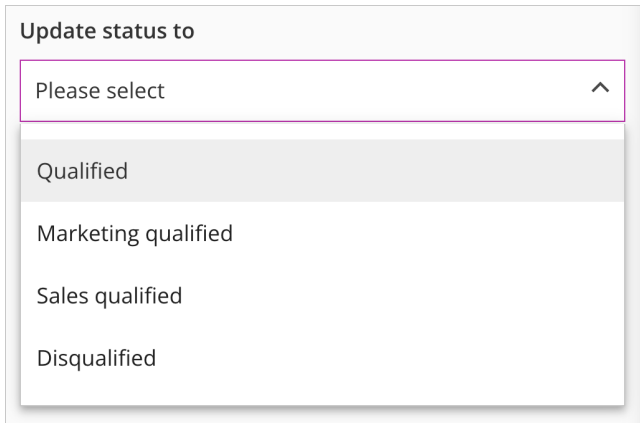


Figure 4: Contact status

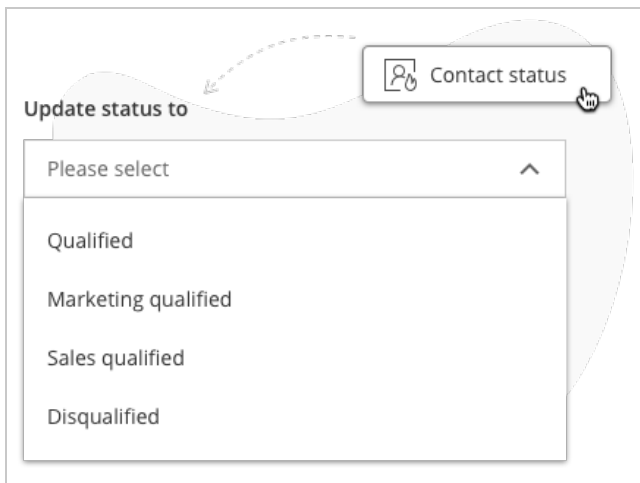


Figure 5: Update contact status

Booking pages do not include qualification questions so they cannot update the qualification status for a contact.

Manually updating the qualification status for a contact

You can manually update the qualification status for a contact in your activity screen. For example, you might change the qualification status of a contact after conducting an initial discovery call or live chat conversation.

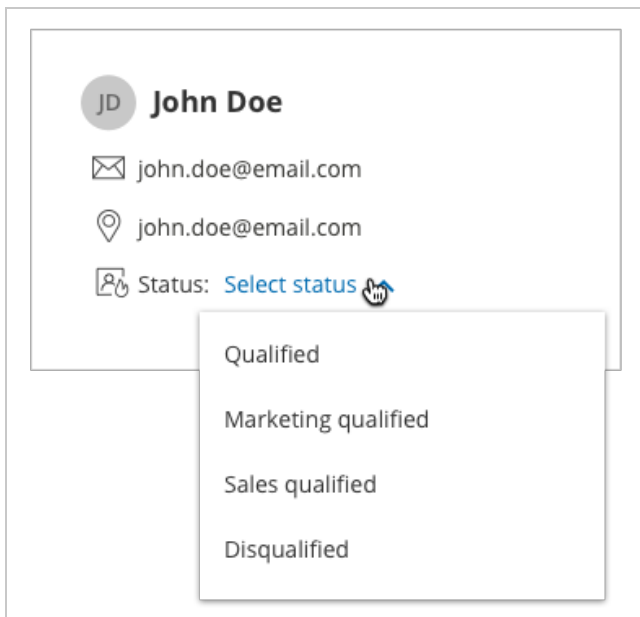


Figure 6: Select contact status