

Update contacts with your CRM

Last Modified on Nov 7, 2024

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

Note:

This integration currently supports updating 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 update both, you can connect both integrations.

If you use a different CRM than Salesforce or HubSpot, you may be able to update contacts to your CRM with our [Zapier integration](#) instead.

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 updated to your CRM, you'll be able to gather and accelerate more leads for your organization.

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

Update from chatbots or forms to your CRM

Our integration connects to lead objects, contact objects, and events in your CRM.

Contacts update 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 update 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](#).
 - Note that this step is optional, as all required fields will already be mapped.
5. Any bookings made or new contacts added during the scheduling process will be automatically updated to your CRM.

Adding contact statuses to help with filtering leads in your CRM

While all contacts created through chatbots and routing forms are automatically updated in your CRM, you can enhance lead filtering by adding a status during the interaction. This gives you more flexibility when sorting leads in your CRM.

Using the **Contact status** action, you can assign a label to contacts during their interaction with a chatbot or routing form. These labels will be passed to your CRM, allowing you to filter leads based on their status.

To add the Contact status action:

1. Open the chatbot or routing form you want to edit.
2. In the "Add Interaction" panel on the right, scroll down to **Contact status** and add it to your chatbot or routing form.
3. Add an internal label, then select the desired status from the **Update status to:** drop-down menu. This status will be applied to visitors who reach this interaction point.

Visitors won't see this interaction as they use the chatbot or routing form; it operates in the background. You can use it in various ways, adding it at different points in the chatbot or routing form, depending on how you want to categorize visitors:

- If added directly after the welcome message, any visitor engaging with the chatbot or routing form will be updated in the CRM with the assigned status. This can be useful if you're getting new contacts from a chatbot or form that you don't want to include in your CRM.
- If you only want to label specific visitors, such as qualified leads, you can add the **Contact status** action as part of the step leading to a scheduling action.

Filtering with your CRM:

Once you have added Contact status in your chatbot or routing form, you can use filtering tools in your CRM to identify and sort leads from OnceHub based on their contact status.

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 updating 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
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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

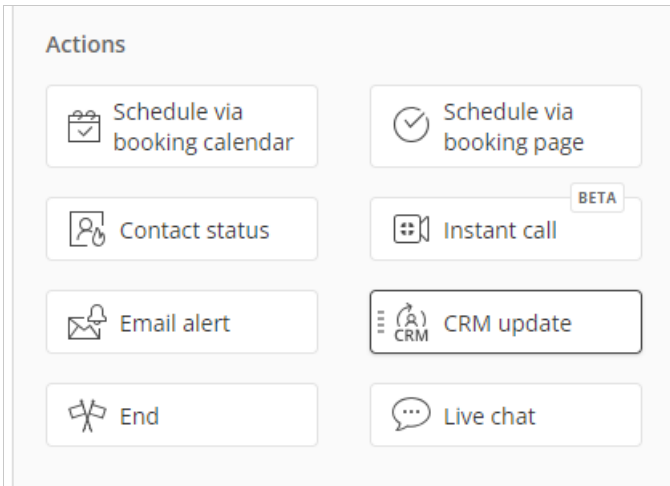
New contacts or leads are assigned ownership automatically, based on the user email of the contact owner in OnceHub. Note that the email **must** be the same as your CRM account email (**cannot** be an alias email).

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.

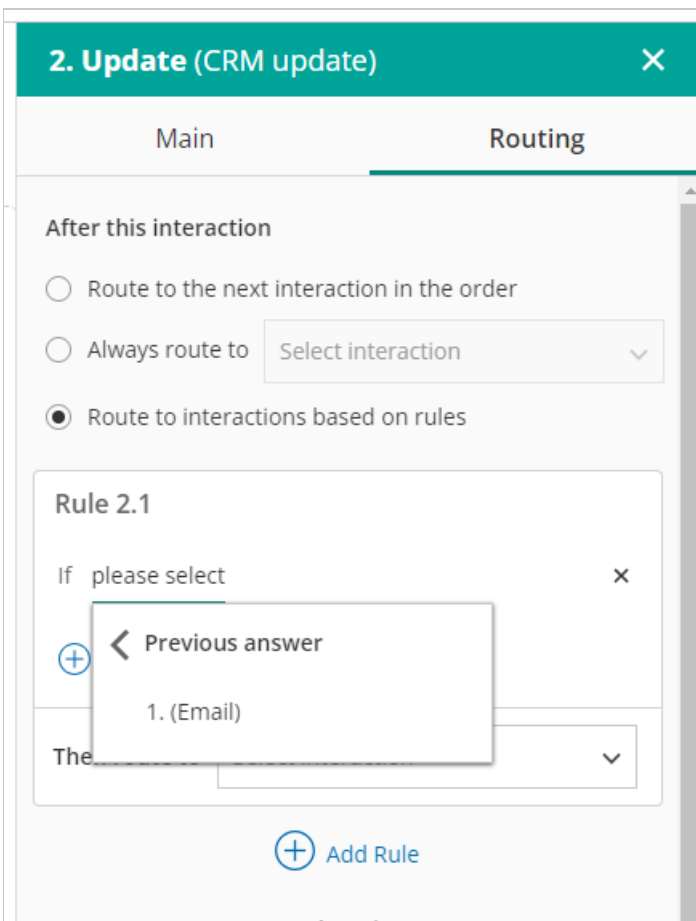
Add CRM update to your bots and forms

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



Add a CRM update interaction

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



Routing the CRM update interaction

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