Introduction to Contacts in OnceHub

Contacts are at the **core** of how OnceHub manages your customer data. Rather than treating bookings, Chatbots interactions or Routing Forms submissions as isolated activities, OnceHub consolidates these interactions into a one record.

The **Contact Database** is your centralized repository for managing customer information, accessible via **Contacts** in the left navigation menu. From here, you can view, edit or delete your customer data from a single location.

What Are Contacts?

A Contact represents a single, unified view of your customer and serves as the **complete activity record.**

By grouping activities under one record, you gain full visibility into:

- **Captured Details:** Information collected across different touchpoints.
- **Engagement History:** A chronological log of every interaction the customer has had with your account.

How Are Contacts Created?

Contacts are created automatically whenever a customer performs an activity (e.g., scheduling a meeting or interacting with Chatbots and Routing Forms). OnceHub uses two identifiers to build these records:

- **Email Address (Primary):** Recommended for web-based interactions and digital scheduling.
- **Phone Number (Secondary):** Recommended for phone-first scenarios, or high-speed scheduling.

When an activity occurs, the system uses these identifiers to either:

1. **Create a New Contact:** If no matching email or phone number is found.
2. **Identify and Associate:** If a match is found, OnceHub links the new activity to the existing Contact to maintain a unified history.
   To learn more about how Contact identification works, please see our **How OnceHub Associate Activities With A Contact** article.

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IMPORTANT: Contacts in OnceHub are built automatically from activities and **not manually created like a traditional CRM.**

What Information is Stored in a Contact?

Each contact record stores:

- **Captured Contact Details:** All information captured through **mapped Object Properties in Booking links, Routing Forms and Chatbots.**
- **Contact status:** A dropdown list of statuses which reflect where the contact is in your qualification pipeline.
- **Recent Page Views:** A chronological list of the recent Pages from your account that your customer has visited provided **cookies are enabled in OnceHub.**
- **Recent Activity:** A detailed log of their latest interactions, such as completed bookings and Routing Forms submitted.

To view or create **Contact Properties**, click on **Manage contact properties** near the gear icon in the top right corner of the Contacts page.