

Contacts in OnceHub

Contacts are at the core of managing guest interactions in OnceHub. This guide will help you understand what contacts are, how they work, and how you can efficiently gather and manage their attributes.

What Are Contacts in OnceHub?

OnceHub automatically saves guests who interact with your services as **Contacts**. These **Contacts** can include:

- Guests who schedule meetings through **Booking Calendars**.
- Visitors interacting with your **Chatbot** or **Routing Forms** on your website.

Each **Contact** is uniquely identified by their email address (if available). This allows OnceHub to group activities associated with the same contact, such as bookings and form submissions, giving you a comprehensive view of their interactions.

Why Are Contacts Important?

Managing contacts helps you:

- **View All Related Activities:** Access a full history of activities for a contact. This provides valuable context before you take further actions, such as scheduling follow-ups or personalizing communications.
 - **Maintain Organized Records:** Store relevant contact attributes like name, email, and any additional custom fields you define.
 - **Streamline Customer Management:** Gain insights into customer behavior and preferences from the Activity stream.
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How to Manage Contacts

You can manage all Contacts in the account using the **Contacts** page.

Viewing All Contacts

1. Click on **Contacts** in the left-hand navigation menu.

Searching for Contacts by Email Address

You can use the search bar at the top to search for Contacts using their email address.

Deleting a Contact

1. Click on the 3 dots to the right of the Contact you want to delete.
2. Select **Delete** from the dropdown menu.
3. Click on **Delete contact** to confirm.

Who Can Access Contacts?

- **Admins:** Admin users have access to view all contacts and related activities stored in the account.
- **Team Managers:** Can view any contacts that the members of their team are the owners of.
- **Members:** Members can only view contacts they are the owners of.

This role-based approach ensures privacy and tailored access for team members.

Gathering Contact Attributes

A **Contact** is automatically generated in OnceHub whenever a guest interacts with any of your product features.

By default, every **Contact** includes a **First Name** and **Email Address**. These fields are automatically saved and cannot be changed or removed from the system.

You can also map any interaction created in **Booking Calendars, Booking Pages, Chatbots, or Routing Forms** to existing **Contact Fields**, such as:

- Phone Number
- Company Name
- Number of Employees

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