

Integrating with your CRM

Integrating your CRM with OnceHub ensures that as soon as a guest has interacted with any of our product features, a contact is created/updated in OnceHub with their captured information. This is then used to automatically update the corresponding record in your CRM.

By integrating your CRM, you can streamline data management and enhance the accuracy of your records.

To learn how to set up your CRM integration, click [here](#).

Supported CRMs

OnceHub offers native integrations with two leading CRMs:

- **Salesforce**
- **HubSpot**

If you're using a different CRM, you can still connect OnceHub via **Zapier** or the **OnceHub API**. These options let you automate workflows and push booking data directly to your system.

Benefits of CRM Integration

By integrating your CRM with OnceHub, you can:

- **Centralize Data Management:** Automatically sync booking details, keeping all client information in one place.
- **Update Contact Records:** Enrich CRM profiles with new bookings to provide a comprehensive view of client interactions.
- **Automate Lead Tracking:** Create or update leads automatically whenever a guest books a meeting.
- **Save Time:** Eliminate manual data entry by syncing OnceHub data to your CRM effortlessly.

Integrating OnceHub with your CRM not only streamlines data flow but also ensures your team has the latest client insights at their fingertips.

How OnceHub Handles Existing CRM Data

When a booking is made in OnceHub for an existing CRM record, the system ensures data integrity by following these principles:

- **Selective Data Updates:** OnceHub only populates fields that are empty and updates the contact status as needed.
 - **Preservation of Existing Data:** Fields with existing values are left unchanged, ensuring that no important information is overwritten.
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