Setting up your CRM integration [New]

To begin using HubSpot or Salesforce with OnceHub, you'll need to integrate your CRM by following these steps:

1. Click the gear icon in the top-right corner, then select **Account Integrations**.
2. Choose the CRM you want to connect (HubSpot or Salesforce).
3. Click **Connect** and follow the instructions in the pop-up to complete the integration process.

Once your CRM is successfully integrated, you can map OnceHub fields to your CRM to ensure seamless synchronization of booking data.

Permissions Required for HubSpot and Salesforce Integration

To ensure the successful integration of HubSpot and Salesforce with OnceHub, the following permissions should be set in your CRM:

HubSpot

If you want to integrate HubSpot with OnceHub. The first thing you'll need to do is make sure that the **App Marketplace Access** permission is enabled in HubSpot. This is to authorize the OnceHub integration.

Next, you'll need to have **Read & Write Access** to the objects that you want to update in HubSpot. The two objects OnceHub updates in HubSpot are:

- Contacts
- Meetings

The **Edit Property Settings** permission is required if you will be mapping to custom fields. Finally, if your organization enforces restricted permissions, you may need the **Manage Integrations** permission for the integration to properly function.

Salesforce

If you want to integrate Salesforce with OnceHub. The first thing you'll need to do is make sure that the **API Enabled** permission is enabled in Salesforce. This is essential for OnceHub to communicate with Salesforce.

Next, you'll need to have **Read & Edit Access** to the objects that you want to update in Salesforce. The three objects OnceHub updates inside Salesforce are:

- Contacts
- Lead
- Events.
- Cases

If you're a OnceHub admin, we recommend that you have **Modify All Data** permissions; otherwise, you'll need at least Create, Read, and Edit permissions for Contacts, Leads and Events.

How to Map OnceHub Fields to Your CRM

From the CRM section, you can set up the mapping of OnceHub fields to the corresponding fields in HubSpot or Salesforce.

Proper mapping ensures that booking data is transferred seamlessly into your CRM, keeping your records accurate and up to date.

For more detailed instructions on configuring the settings specific to your CRM, expand the sections below for HubSpot or Salesforce.

Mapping OnceHub fields to HubSpot.

Contacts

In the **Contacts Tab**, use the dropdown menus to map **OnceHub Contact fields** to the corresponding HubSpot Contact fields.

- Add fields by clicking the **+ Add Mapping** icon.
- Remove fields by clicking the **X** icon next to the field you want to delete.

To sync responses collected from booking calendars, routing forms or chatbots, you will need to specify that responses should be saved to a specific contact field. This can be done in the settings for questions in your booking calendar forms, routing forms and chatbots.

Meetings

In the **Meetings Tab** you will see to which fields the details from any meeting made in **Booking Calendars** is mapped to.

Mapping OnceHub fields to Salesforce

Contact creation

You can use the radio buttons in the CRM section to specify whether new contact records created through OnceHub should be added as **Leads** or **Contacts**.

Contacts and Leads

In the **Contacts** and **Leads Tabs** you can use the dropdown fields to map the **OnceHub Contact fields** to the relevant **Salesforce fields**.

- Add fields by clicking the **+ Add Mapping** icon.
- Remove fields by clicking the **X** icon next to the field you want to delete.

To sync responses collected from booking calendars, routing forms or chatbots, you will need to specify that responses should be saved to a specific contact field. This can be done in the settings for questions in your booking calendar forms, routing forms and chatbots.

Events and Cases

In the **Events** and **Cases Tabs**, you can view the Salesforce fields where details from meetings scheduled through **Booking Calendars** are mapped.

You can add fields by clicking the **+ Add Mapping** icon or remove them using the **X** icon.

Using Fallback Values in CRM Field Mapping

Fallback values in OnceHub field mapping help maintain the completeness and accuracy of your CRM records, even when certain data isn't collected during the booking process.

How Fallback Values Work

When your CRM includes required fields, OnceHub automatically identifies them and lets you assign a fallback value during the mapping setup. This ensures all necessary fields in your CRM are populated, avoiding errors or incomplete records while maintaining consistent workflows.