

Integrating OnceHub with HubSpot [New]

Using OnceHub's native integration with HubSpot saves you time, ensures accurate data transfer, and enhances your team's ability to manage customer relationships effectively. Here's what this integration helps you achieve:

- **Send Data Effortlessly:** Automatically send information captured in OnceHub (such as from booking calendars, routing forms, or chatbots) to Contacts in your HubSpot database.
- **Track Meetings Automatically:** Ensure that any meeting booked through OnceHub is automatically recorded in HubSpot under the associated Contact.

How to integrate OnceHub with HubSpot

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

1. Click the gear icon located in the top-right corner of the page.
2. Select **Account Integrations** from the dropdown menu.
3. Filter for **CRM**.
4. Click on the **HubSpot** tile.
5. Click **Connect** and follow the instructions in the pop-up to complete the integration process.

Note: The integration must be completed by the Super Administrator of your HubSpot account. Only users with this role have the necessary permissions to authorize and configure the integration between HubSpot and OnceHub.

Mapping OnceHub Fields to HubSpot

Click on **Configure field mapping** to begin configuring how OnceHub fields are mapped 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.
- Use the **Overwrite** toggle to choose whether existing HubSpot data should be overwritten.

To send 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.

Note: Only HubSpot contact fields compatible with the specific OnceHub Contact fields you select will be available in the dropdown for mapping.

Meetings

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