
Managing Contacts in OnceHub

Your list of **captured contacts** can be accessed by clicking on **Contacts** in the left-hand navigation menu

Understanding Role-based Contact Access

- **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.

Search and Filter Your Contacts

You can quickly locate specific contacts in the list by using search and filter options.

- **Search** by name, email, or phone number.
 - **Filter** contacts based on the following criteria:
 - Contact status
 - Contact owner
 - The date that the contact was captured on
 - **Sort** the list by the contact **Name** or the **Captured On** date.
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How to Update a Contact

Editing a Contact

You can update the contact details by using the following steps:

1. Click on the 3 dots to the right of the Contact you want to edit.
2. Select **Edit** from the dropdown.
3. Provide any required updates in the pop-up
4. Click on **Save** to confirm the change.

Important Note: The email address and mobile number can not be updated.

Each edit will trigger an update to all connected integrations, including your CRM, calendar, and Zapier.

Deleting a Contact

You can delete a contact by using the following steps:

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

Upon deletion:

- **Contact Record Deletion:** The contact record will be permanently removed from OnceHub.
- **Related Activities:** Related activities will not be deleted; however, the Contact pane associated with the deleted contact will no longer be visible.
- **Meeting Reminders:** Meeting reminders will remain unaffected.

Creating a Contact

A contact is automatically created whenever a guest interacts with a [Booking link](#), [Routing Form](#), or [Chatbot](#).
