

# 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.

# 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**.