

How To Import Contacts Into OnceHub

Import up to 7,000 contact records at once using a CSV file within the Contacts Lobby.

Tip: Importing contacts is exceptionally useful if you use Phone Agent. It ensures that essential customer details are already captured in OnceHub, meaning your agent won't need to ask callers for their information.

Steps to Import Your Contacts

Follow the steps below to import contacts into OnceHub:

Selecting the File to Import

Follow these steps to select the CSV file that you want to import:

1. Go to **Contacts** from the left navigation menu.
2. Select **Import CSV**.
3. Click **Select CSV File** to open your file browser.
4. Select the file you want to import.

Mapping the File Headers to OnceHub Contact Properties

Once your file is uploaded, OnceHub automatically detects and aligns your CSV columns with the **Contact Properties** it identifies as the best match based on your headers. You can adjust these configurations manually by using the **Contact Property** dropdowns on the right side of the page.

Once done, you can click on **Start Import** to securely import all of your contact records.

Viewing the List of Imported Contacts

Follow these steps to view the list of all contact records created from the CSV import:

1. Expand **Imports** in the left sidebar.
2. Select the import you want to view.

Frequently Asked Questions (FAQs)

Q: What happens if I upload a contact record for a Contact that already exists in OnceHub?

A: The existing contact record will be automatically updated with the new information provided in your CSV file. See our article on [How OnceHub Associates Activities with a Contact](#) for more information on how we identify contacts.