
How To Assign Meetings To The CRM Contact Owner [New]

You can override standard meeting distribution rules to have visitors schedule directly with their assigned contact owners. OnceHub prioritizes owners from your integrated **Salesforce** or **HubSpot** account, using the OnceHub contact owner as a fallback if no CRM is connected.

This is done by enabling the **Schedule with CRM Contact Owner** toggle located within the **Booking Calendar** action of your **Routing Forms**.

How Meeting Assignment Priority Works

When a visitor engages with a Routing Form, OnceHub identifies them by their provided email address. OnceHub then determines which team member should host the meeting based on a strict priority hierarchy:

- **CRM Contact Owner:** If a CRM contact owner is found that belongs to the **Team selected as the host on your Booking Calendar**, the visitor will schedule with them.
 - **OnceHub Contact Owner Fallback:** If no CRM contact owner is found, the system checks for an existing OnceHub contact owner and schedules the meeting with them instead.
 - **Standard Availability Fallback:** If neither a CRM owner nor a OnceHub contact owner exists, the standard distribution rules set on the Booking Calendar will be used.
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How to Enable Contact Owner Meeting Assignment

Follow the steps below to enable this functionality in your Routing Form:

1. Click **Routing Forms** in the left-hand navigation menu.
 2. Select the Routing Form you wish to edit.
 3. Select the **Booking Calendar** action that will be used to schedule with contact owners.
 4. Enable **Schedule with CRM Contact Owner**.
 5. Click **Save** to apply the changes.
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Frequently Asked Questions (FAQs)

Q: What happens if the contact owner has no available time slots?

A: If the contact owner has no open time slots, a message stating that no times are available will be displayed to the visitor while scheduling.

Q: What happens if a contact has different owners assigned in OnceHub compared to the CRM?

A: OnceHub prioritizes the contact owner listed in your integrated CRM to ensure your source-of-truth data remains accurate.
