

Adding Zaps in ScheduleOnce

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The [ScheduleOnce connector for Zapier](#) allows you to add Zaps directly from within your ScheduleOnce account. This can be done using ready-made Zap templates.

ScheduleOnce Zap templates give you access to predefined workflows for common use cases. Using templates, you can simply follow the guided setup experience with prefilled options and fields, instead of [creating Zaps from scratch in the Zap Editor](#).

In this article, you will learn how to add Zaps from within ScheduleOnce.

Requirements

Before adding a Zap, you must:

- Have a [Zapier account](#)
- [Generate a Zapier API key in ScheduleOnce](#)

Adding a Zap from within ScheduleOnce

1. Log into your OnceHub account.
2. Go to **Setup -> ScheduleOnce setup**.
3. Expand the lefthand sidebar, navigate to **Integrations -> Zapier**, and select the **Add Zaps** tab. Here, you can search for apps with Zap templates to connect with ScheduleOnce. By default, the **Popular Zaps** category is selected, showing you the most popular Zaps used by ScheduleOnce Users (Figure 1).

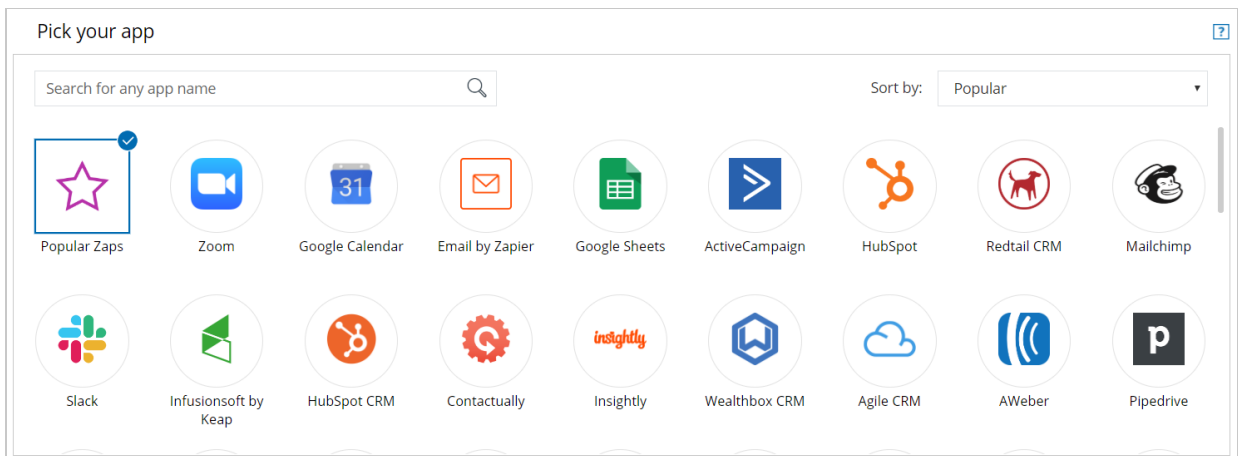


Figure 1: The Add Zaps tab with the Popular Zaps category selected

4. Filter the Zaps shown by selecting one or more apps in the Search area. The Zap templates are displayed below the Search area, listed by popularity by each selected app (see Figure 2).

Note:

To find a specific app, you can type the app name in the Search bar. You can also sort the list of apps by

popularity or alphabetically (see Figure 2).

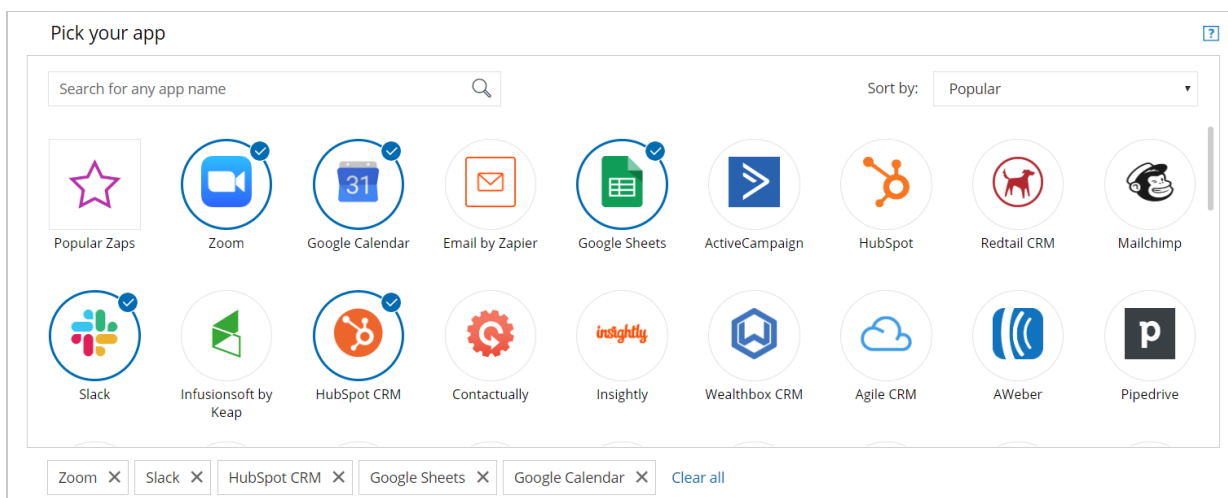


Figure 2: Selecting specific apps

5. Click the **Add Zap** button to add a Zap or to see a detailed description of the template (see Figure 3). The Zap Editor will open in ScheduleOnce, allowing you to customize the Zap (see Figure 4).

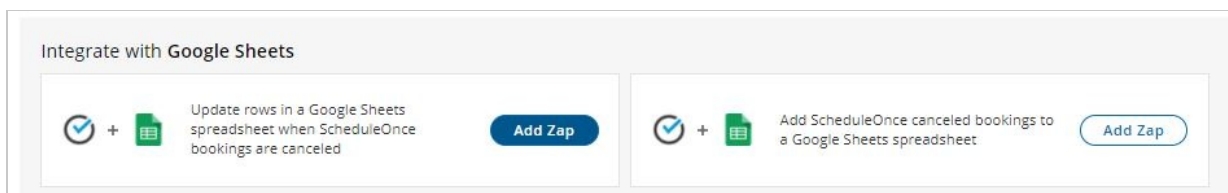


Figure 3: The Add Zap button

6. To add the template to your account click **Create this Zap** (see Figure 4). If you are not already logged in to Zapier or have not yet signed up for a Zapier account, you will be asked to log in or sign up at this stage.

Create rows in a Google Sheets spreadsheet from ScheduleOnce bookings

Creating an archive or running list of meetings you've had in a spreadsheet is a great way to quickly access information about them, or report on any you've had. Zapier can create new rows in a spreadsheet for you, so you can focus on the meeting itself, and not recording the actual information.

How It Works

1. You have a new booking in ScheduleOnce
2. Zapier creates a new row in a Google Sheets spreadsheet

What You Need

ScheduleOnce account
Google Docs account

[Create this Zap](#)

Want to do something else? Explore [other Zaps!](#)

Figure 4: The Zap Editor

7. Select a ScheduleOnce account. If you have already connected ScheduleOnce with Zapier, simply select the account (see Figure 5). Make sure to test the connection by clicking the **Test** button.

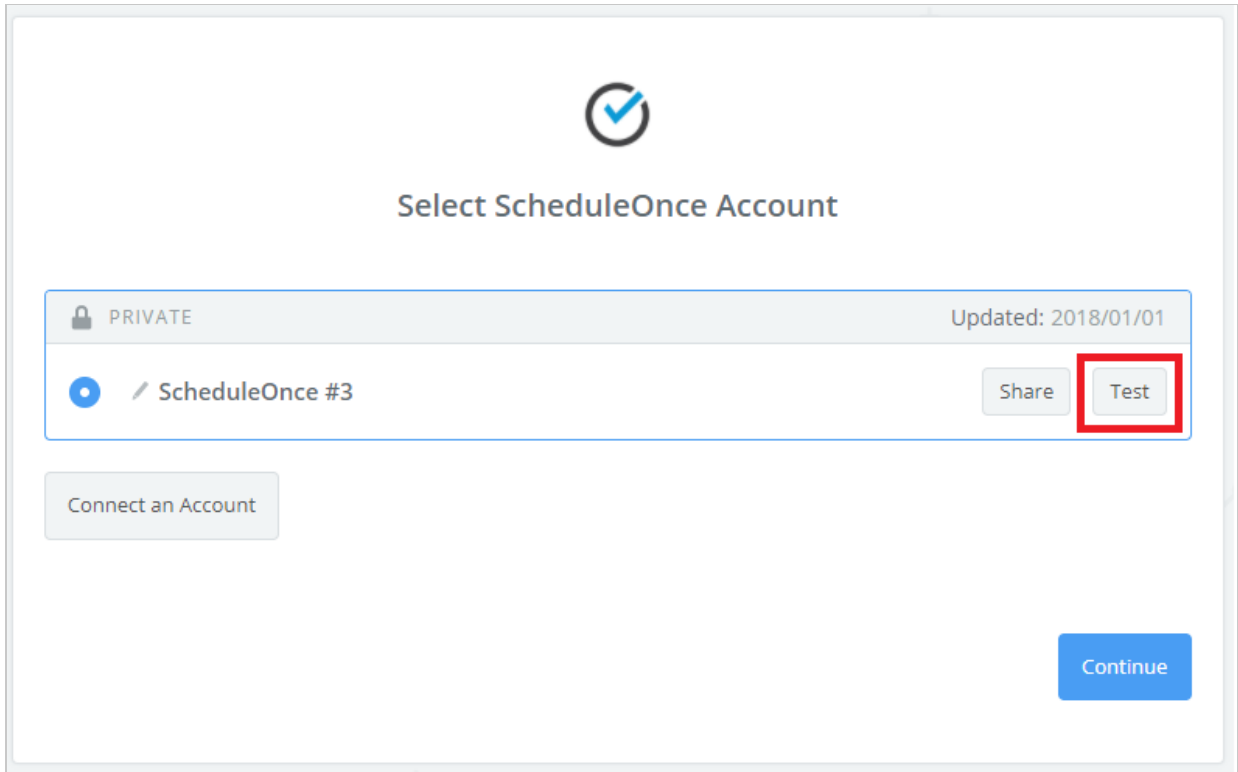


Figure 5: Select a ScheduleOnce account

8. If you have not connected an account, or want to connect a different account, click on the **Connect an Account** button to establish a new connection. You will be asked to provide your Zapier **API Key** and **ScheduleOnce Login ID** in the Zapier authentication page (see Figure 6).

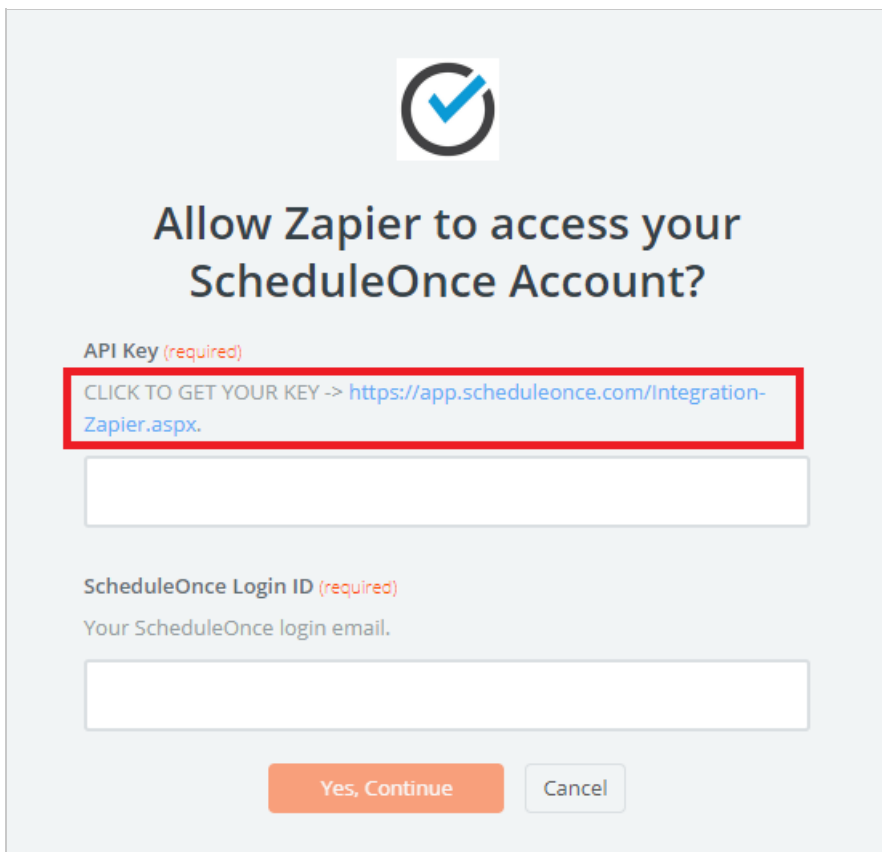


Figure 6: Zapier authentication page

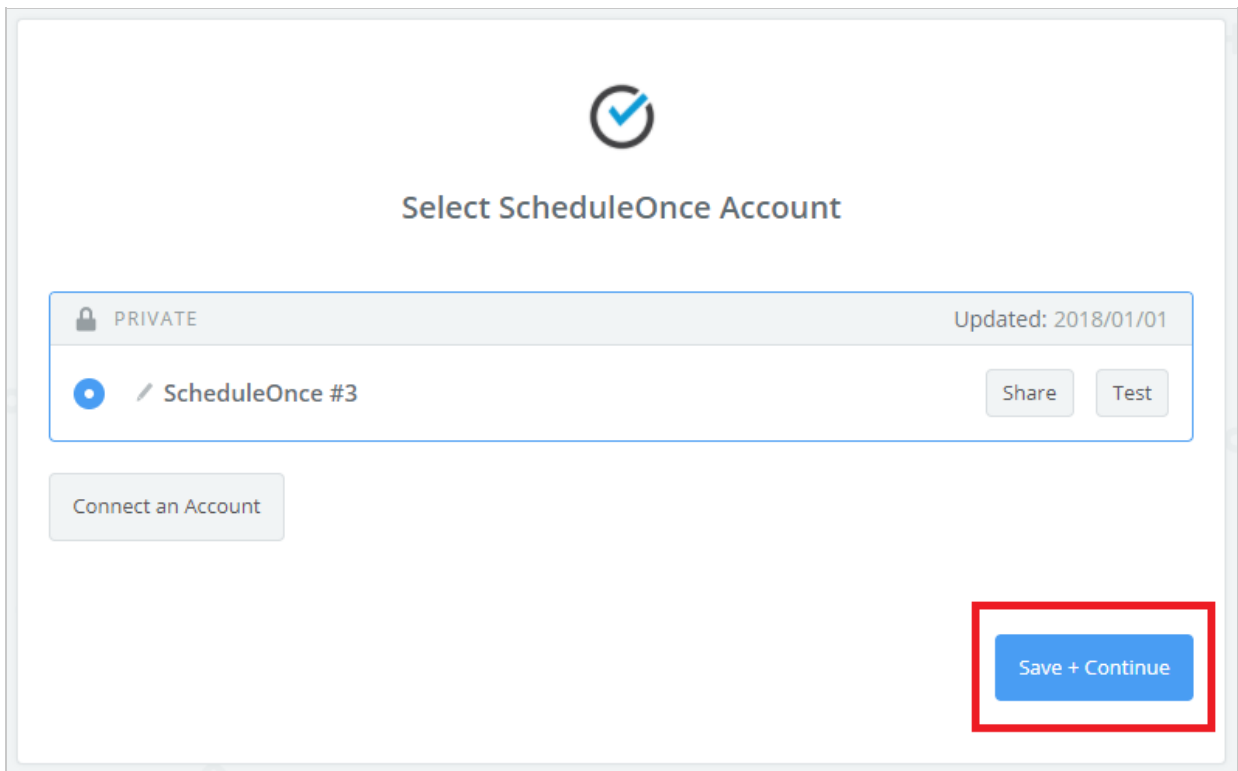
9. Click the link to open your ScheduleOnce account in a new browser tab. Copy your **API key** and **Login ID** from the **API Key** tab in the ScheduleOnce Zapier integration page (see Figure 7).



The screenshot shows two input fields. The first is labeled 'API key:' and contains the text 'a9bd9b748c914090809f2dc591ae93ea'. To its right is a blue 'Copy' button. The second is labeled 'Login ID:' and contains the text 'dana@example.com'. To its right is another blue 'Copy' button.

Figure 7: Your API key and Login ID

10. Once connected, click **Save + Continue** in the Zap Editor (see Figure 8).



The screenshot shows the 'Select ScheduleOnce Account' interface. At the top center is a blue checkmark icon. Below it is the title 'Select ScheduleOnce Account'. There is a grey bar with a lock icon and the word 'PRIVATE' on the left, and 'Updated: 2018/01/01' on the right. Below this bar is a card for 'ScheduleOnce #3' with a blue play button icon on the left and 'Share' and 'Test' buttons on the right. Below the card is a 'Connect an Account' button. In the bottom right corner, a blue 'Save + Continue' button is highlighted with a red rectangular border.

Figure 8: Save + Continue

11. Test the ScheduleOnce trigger. First, make sure you have an existing booking in your connected ScheduleOnce account. If not, you can make a test booking by opening your Booking page in a new browser tab. Once you have at least one booking, click **Fetch & Continue** to test the trigger (see Figure 9).

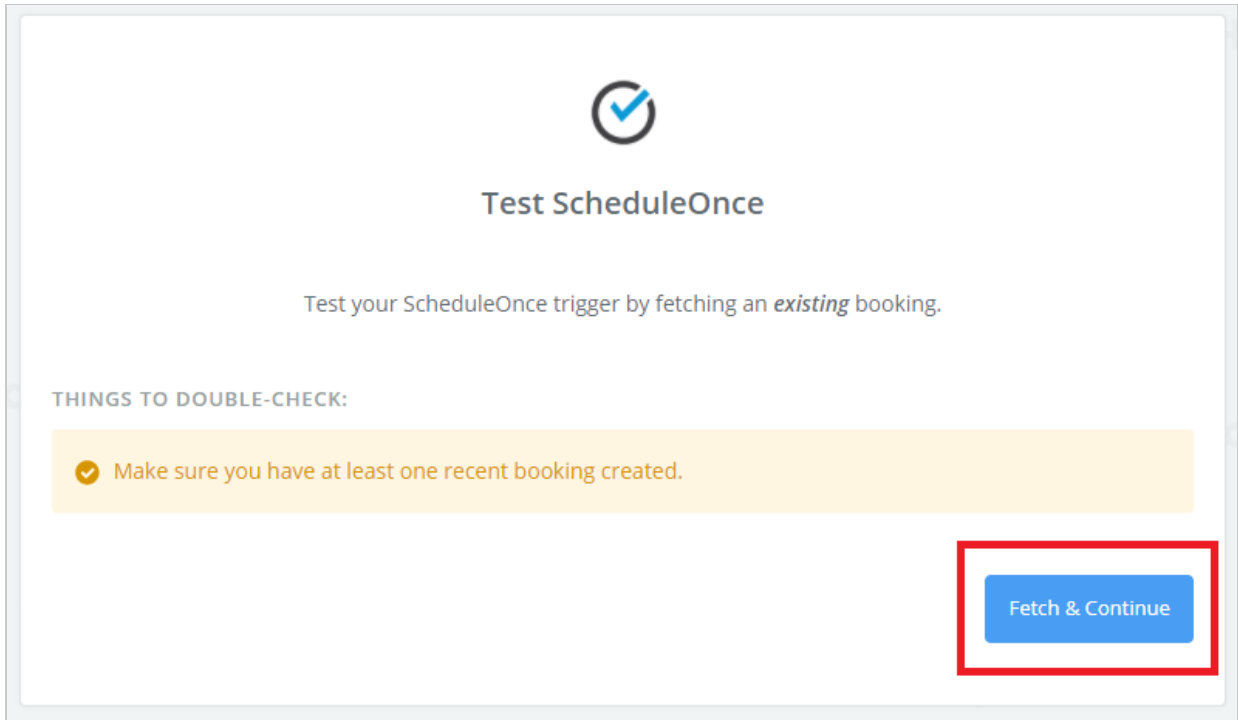


Figure 9: Test the ScheduleOnce trigger

12. Once the test is successful, click **Continue** (see Figure 10).

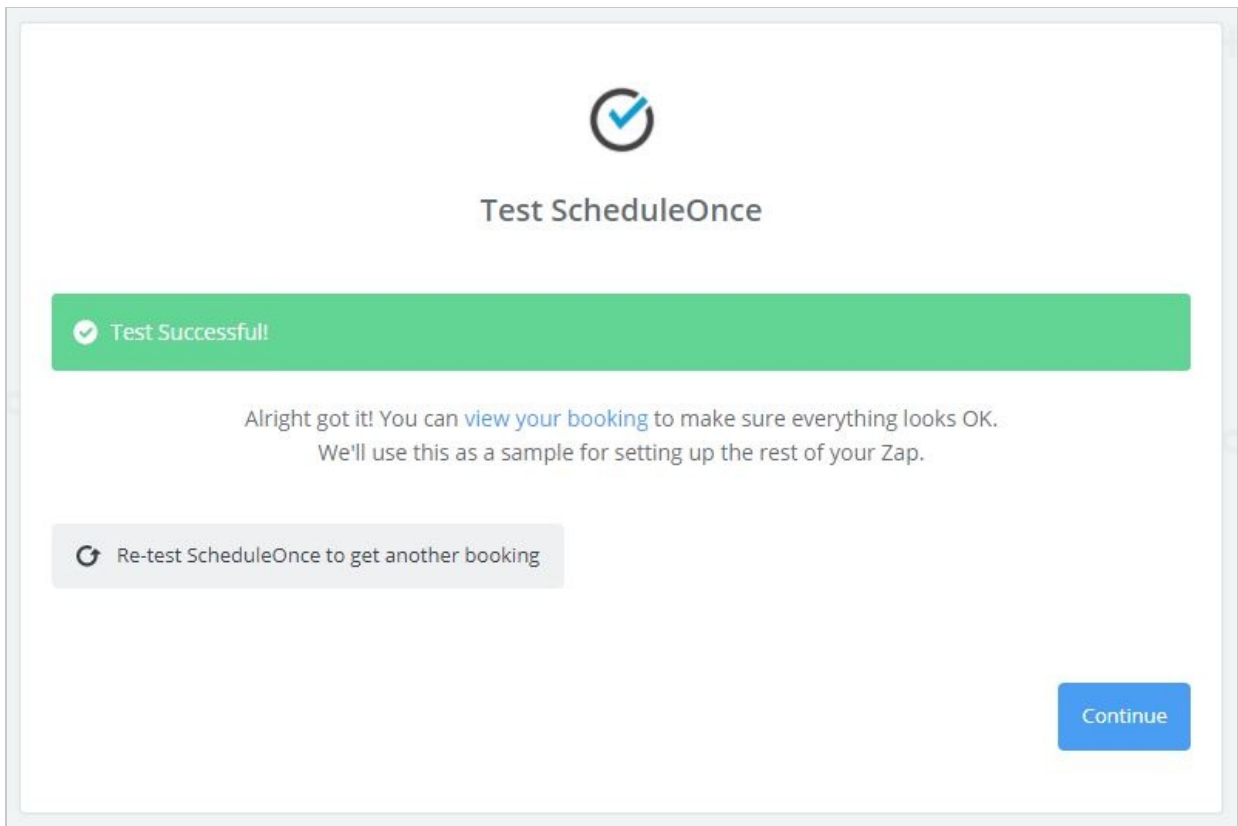


Figure 10: Test is successful

Note:

You can add a Filter step to more accurately define when to trigger this Zap. For example, you can define a filter that states only specific booking events (e.g. "Scheduled" and "Rescheduled") or specific Bookings pages will trigger the Zap. [Learn more about adding a Filter step in Zapier](#)

13. Select an account for your Action app (see Figure 11). If you have already connected your account with Zapier, simply select the account. Make sure to test the connection by clicking the **Test** button. If you have not connected an account or want to connect a different account, click the **Connect an Account** button to establish a new connection. Once connected, click **Save + Continue**.

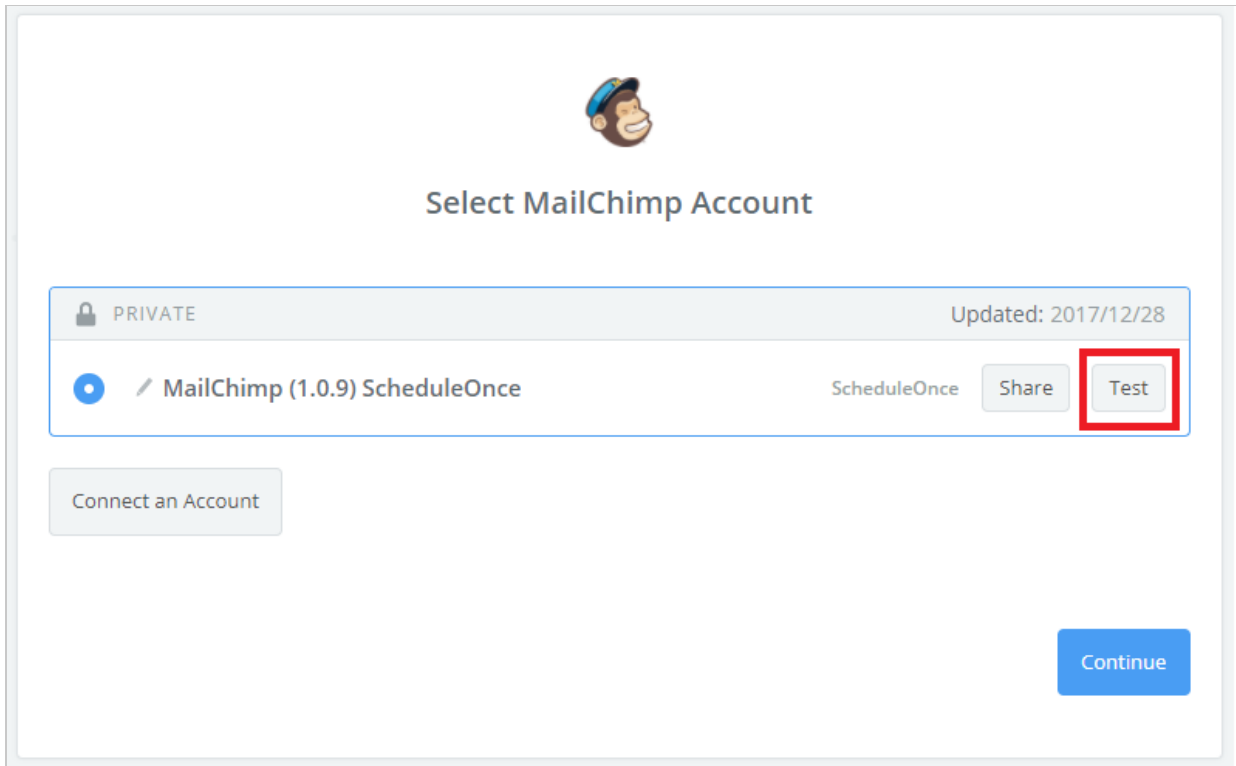


Figure 11: Select an account for your Action app

14. Set up the Action by filling in the fields (see Figure 12). Some fields require you to select values from the Action app, while other fields require you to use your own text and/or values from ScheduleOnce fields. Click on a field's drop-down to see which options are available. Use the Search bar at the top of the dropdown to search for a specific field. Values from ScheduleOnce fields will be dynamically updated with the relevant booking data and customer data each time the Zap is triggered. In the example below, ScheduleOnce's **Customer - Email** field is used as the value for the **Subscriber Email** field in MailChimp, the Action app. [Learn more about the ScheduleOnce fields available in Zapier](#)

Set up MailChimp Subscriber

Setup Preview [Learn more](#) OFF

List (required)
ScheduleOnce

Subscriber Email (required)
The email address of the subscriber you want to subscribe to this list.

Step 1 Customer - Email

Search...

1 Scheduled Booking

Customer - First name name



Customer - Last name

Customer - Email ajrcr@gmail.com

Customer - Mobile phone

Figure 12: Set up the Action

15. Test the Action step by following the instructions. Once you are done testing, you can either add another step or click **Finish** to complete the Zap (see Figure 13).

 >  **Send Test Subscriber to MailChimp**
To test MailChimp, we need to create a new subscriber. This is what will be created:

! Testing for this step was skipped. Try again anytime.

SAMPLE:

Q Search...

List:	ScheduleOnce
Subscriber Email:	ajrcr@gmail.com
Double Opt-In:	false
Update Existing:	false

EMPTY FIELDS:


Replace Groups:	empty (optional)
Groups:	empty (optional)
First Name:	empty (optional)
Last Name:	empty (optional)
Birthday:	empty (optional)

Send Test To MailChimp Add a Step OR **Finish**

Figure 13: Test the Action step by following the instructions

16. Turn on your Zap (see Figure 14).

Congratulations! You are done. Your Zap is active and your workflow is automated. You can now close the Add Zap popup and return to browsing Zap templates in ScheduleOnce.

 **Note:**

By default, Zaps are only triggered from Booking pages you own. ScheduleOnce administrators can be allowed to trigger Zaps from pages not under their ownership by enabling the **Trigger Zaps from all Booking**

pages permission in the Administrator's profile. [Learn more about triggering Zaps from pages not under your](#)

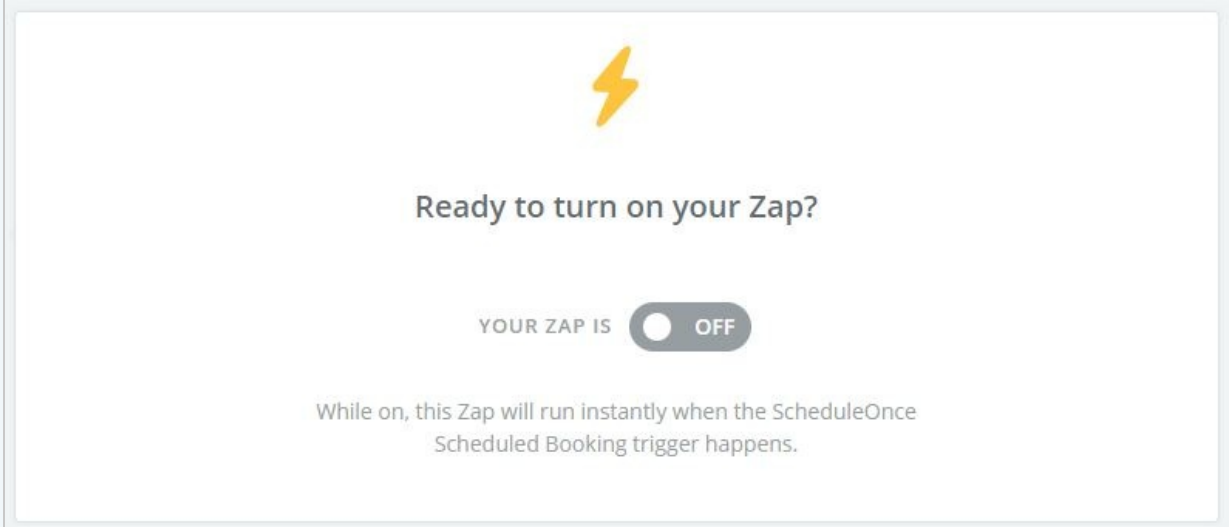


Figure 14: Turn on your Zap

[ownership](#)

If none of the ready-made Zaps suits your exact scenario, you can also [create your own Zaps from scratch in Zapier](#) with any of the 1,000+ apps connected.