

Adding Zaps in OnceHub

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

OnceHub 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 OnceHub.

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Requirements

Before adding a Zap, you must:

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

Adding a Zap from within OnceHub

1. Log into your OnceHub account.
2. Select your profile picture or initials in the top right-hand corner → **Profile settings** → **Zapier**, and select the **Add Zaps** tab. Here, you can search for apps with Zap templates to connect with OnceHub. By default, the **Popular Zaps** category is selected, showing you the most popular Zaps used by OnceHub Users (Figure 1).

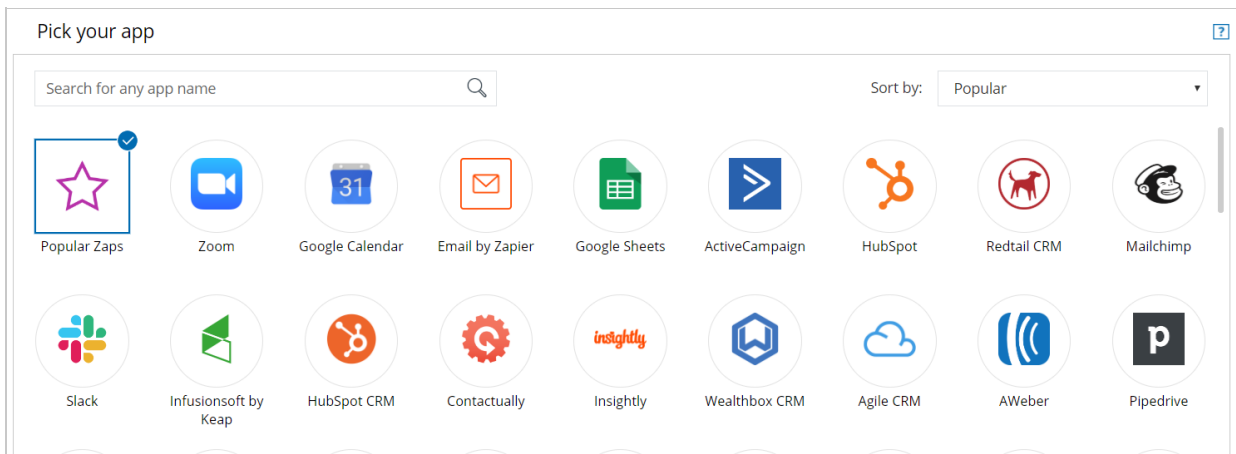


Figure 1: The Add Zaps tab with the Popular Zaps category selected

3. 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).

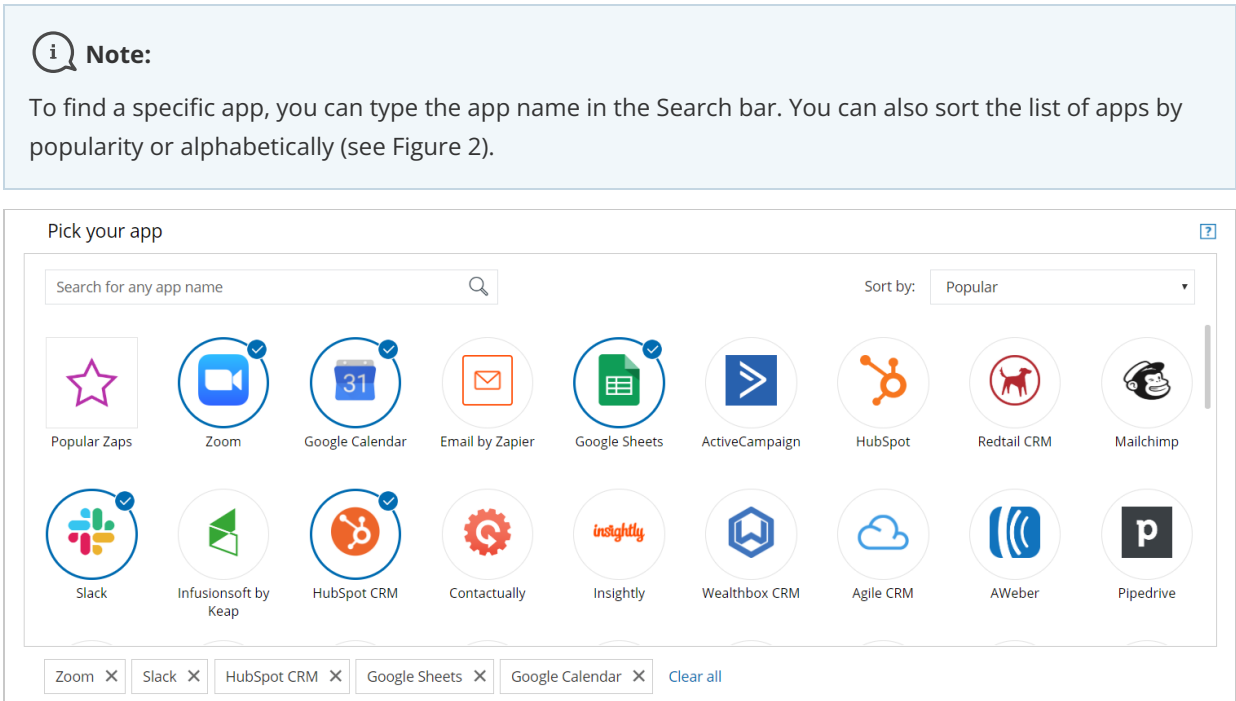


Figure 2: Selecting specific apps

4. 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 OnceHub, allowing you to customize the Zap (see Figure 4).

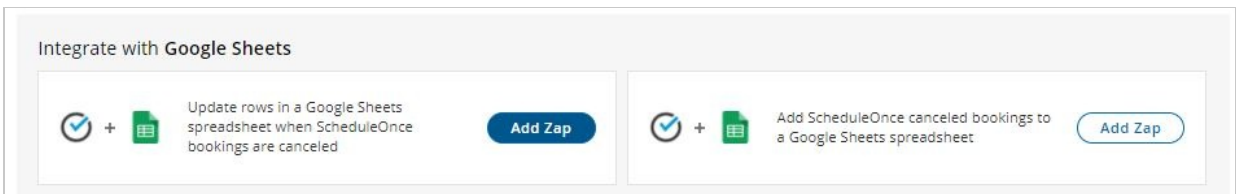


Figure 3: The Add Zap button

5. 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

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

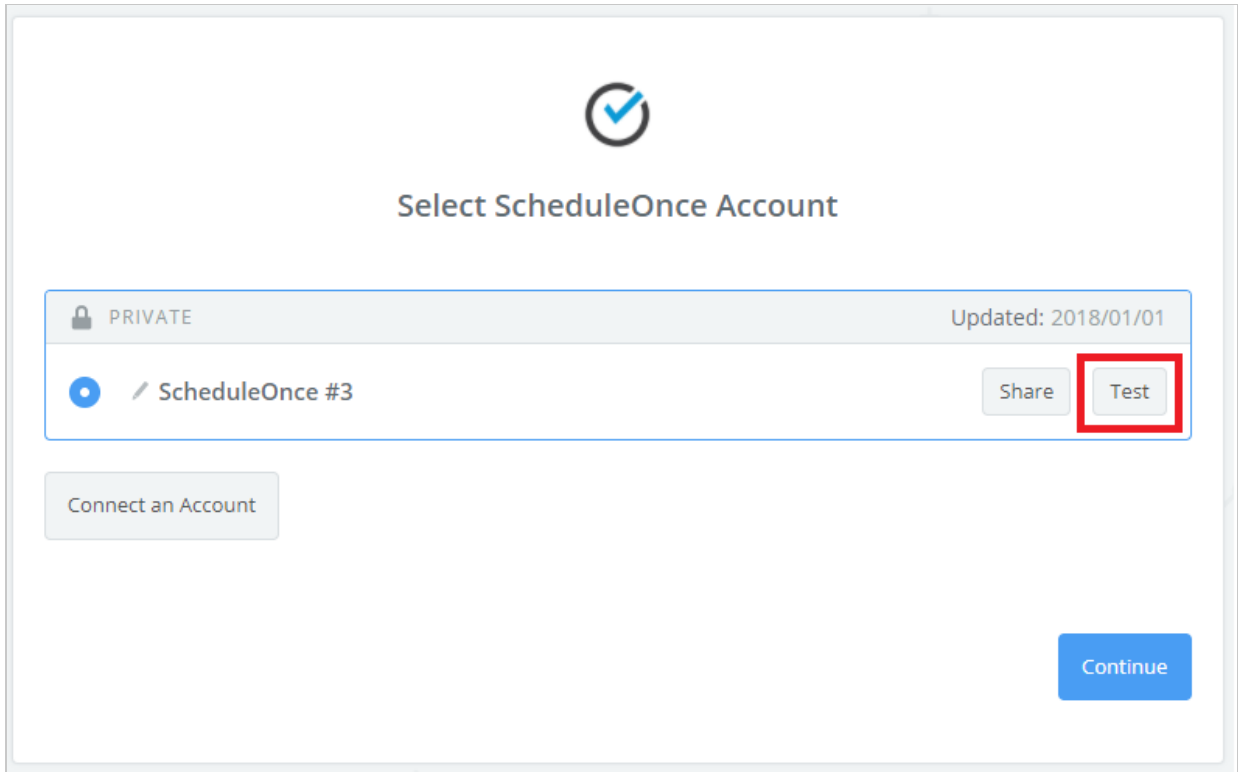


Figure 5: Select a OnceHub account

- 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 **OnceHub Login ID** in the Zapier authentication page.
- Click the link to open your OnceHub account in a new browser tab. Copy your **API key** and **Login ID** from the **API Key** tab in the OnceHub Zapier integration page (see Figure 6).



Figure 6: Your API key and Login ID

- Once connected, click **Save + Continue** in the Zap Editor (see Figure 8).
- Test the OnceHub trigger. First, make sure you have an existing booking in your connected OnceHub 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.
- Once the test is successful, click **Continue**.

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](#)

- 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**.

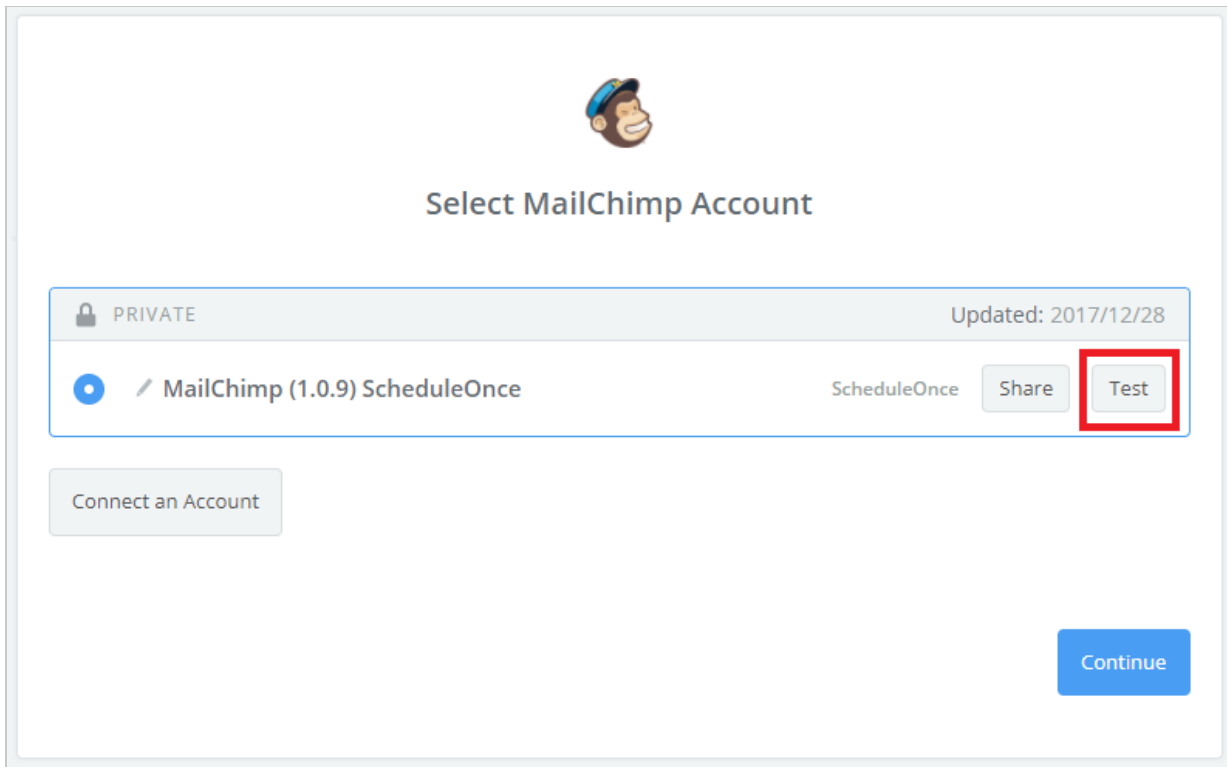


Figure 7: Select an account for your Action app

13. 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 OnceHub 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 OnceHub fields will be dynamically updated with the relevant booking data and customer data each time the Zap is triggered. In the example below, OnceHub's **Customer – Email** field is used as the value for the **Subscriber Email** field in MailChimp, the Action app. [Learn more about the OnceHub 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 ajrcrc@gmail.com

Customer - Mobile phone

Figure 8: Set up the Action

14. 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 9: Test the Action step by following the instructions

15. 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 OnceHub.

 **Note:**

By default, Zaps are only triggered from Booking pages you own. OnceHub 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](#)

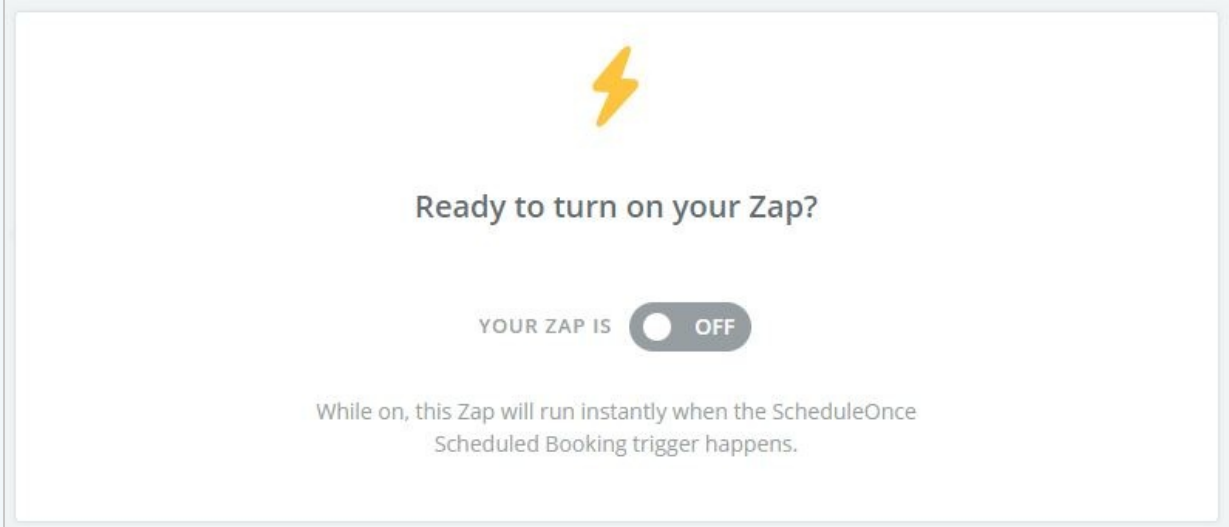


Figure 10: Turn on your Zap

[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.