

Tips for integrating OnceHub with marketing automation apps

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Note:

When integrating with marketing automation apps, it's best to use one of our [specific triggers](#).

This article includes tips for integrating OnceHub with marketing automation apps using Zapier as an integration platform.

Supported use cases

Using OnceHub with Zapier provides support the following marketing automation use cases:

1. When a booking is made in OnceHub, a new prospect, customer, or lead can be created in the marketing automation app.
2. When a booking is made in OnceHub, a new task, activity, or opportunity can be created in the marketing automation app.
3. When a booking is rescheduled in OnceHub, a new task, activity, or opportunity can be created in the marketing automation app.

Limitations

The following is a list of some integration limitations using Zapier. It's important to understand how these affect your business processes:

1. **Some 3rd party apps on Zapier only provide a 'create' action.** The most common use case these apps support is the creation of a new Contact, Task, Appointment etc. Updating these records is less common, however more and more apps are providing an 'update' functionality. Please make sure to read the 3rd party app Zapier documentation carefully to determine how you can perform updates. You should review your business processes carefully so your Zaps do not create many duplicate records in your system. Contact us if you need some help determining how to set up Zapier correctly.
2. **You cannot link entities in the target app.** E.g. when creating a new CRM task, it is not possible to link it to an existing lead, contact, deal, or opportunity. However, you can use the [composite field](#) from OnceHub to store customer and booking data as part of the CRM task.