

Setting up a Zap for Routing Forms and Chatbots

Setting up a Zap can help automate your workflows by connecting your Chatbots and Routing Forms with other applications. Follow the instructions below to set up your Zap efficiently:

Saving Routing Form and Chatbot data to a Contact

To ensure your guests' data is passed to Zapier, you must first map each Interaction to a specific **Contact field**. Follow these steps to configure it properly:

Step 1: Access the Flow Builder

- Open the **Routing Forms/Chatbots Lobby** by using the left-hand navigation.
- Edit the relevant **Routing Form** or **Chatbot** and navigate to the **Flow Builder** tab.

Step 2: Save the Data to a Contact Field

- Select the specific **Interaction** you want to map.
- In the panel on the right:
 - Choose the option to save the data **In the conversation and as a contact field**.
 - Select the appropriate contact field from the dropdown menu for storing the data.

By completing these steps, your guests' data will be properly mapped and ready to flow into Zapier for seamless automation.

Setting up the Zap

After mapping your data in OnceHub, follow these steps to create a Zap that retrieves the correct contact when a guest engages with you.

Step 1: Open the Zapier pop-up

1. Navigate to Zapier Settings:

1. Click the gear icon located in the top-right corner of the page.
2. Select **Zapier** from the dropdown menu.

2. Initiate Zap Creation:

1. Go to the **Add Zaps** section.
2. Search for the application with which you want to create a Zap.

Step 2: Choose a Template

1. A list of Zapier templates will appear below. Select the one that best fits your needs.
2. Click **Add Zap** to use your chosen template.

Step 3: Configure the Trigger Step

1. Confirm the **Trigger event** and OnceHub account that should be used.
 - For example, you can use the **Conversation Closed** trigger to have the Zap trigger whenever a guest is finished engaging with a Routing Form.
2. Complete the test step to ensure the trigger functions correctly.

Step 4: Add a New Zap Step

1. In the flowchart, click on the + (Add step) button to introduce a new step.
2. Choose **OnceHub** from the list of applications.

Step 5: Add the Find Contact Action

1. Select **Find Contact** from the Action event dropdown.
2. Click **Continue** to proceed to the Configure step .
3. Select **Contact ID** from the Find Contact by dropdown.
4. Click the + and select **Conversation Contact** for the **Value** field.
5. Complete the test step to verify the action.

Step 6: Mapping Data in the Final Action

1. In the Action for the app where you're sending the contact data, go to its Configure step .
2. Add values to any fields you need by clicking the +.
3. Select **Find Contact in OnceHub**, then map the data to the corresponding OnceHub contact fields.

Completion

By following these steps, you'll successfully connect your Routing Forms and Chatbots so that you can use the retrieved contact data to streamline your workflows in Zapier.
