Setting up a Zap for Booking Calendars [New]

Setting up a Zap can help automate your workflows by connecting your booking calendars with other applications. Follow the instructions below to set up your Zap efficiently:

Saving Booking Calendar data to a Contact

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

Step 1: Access the Booking Form

- Open the **Booking Calendar Lobby** by using the left-hand navigation.
- Edit the relevant **Booking Calendar** and navigate to the **Booking Form** tab.

Step 2: Save the Data to a Contact Field

- Select the specific **Question** you want to map.
- In the panel on the right:

  - Choose the option to save the data **In the meeting 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 use in your Zaps.

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 interacts with you.

Step 1: Open the Zapier pop-up

1. **Navigate to Zapier Settings:**

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

2. **Initiate Zap Creation:**

   - Go to the **Add Zaps** section.
   - 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 **Booking Lifecycle Event** trigger to have the Zap trigger whenever a change to a booking is made.

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 email** from the **Find Contact by** dropdown.
4. Click the **+** and select **Contact - Email** 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 destination application, proceed to its Configure step.
2. Add values to required fields by clicking the **+**.

   - Select **Find Contact in OnceHub**, to map data from the corresponding OnceHub contact fields.
   - Or **Booking Scheduled in OnceHub**, to map booking related data such as Meeting time.

Completion

By following these steps, you'll successfully connect your booking calendar and use the retrieved contact data to streamline your workflows in Zapier.