Setting Up a Zap for Routing Forms

In this guide, you will learn how to automate visitor information transfer from your Routing Forms to your preferred applications via a Zap.

For information on how to capture visitor data in Form Submission Fields, please take a look at **this article**.

Setting up the Zap

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

Step 1: Opening the Zapier pop-up

1. **Navigating to Zapier Settings:**
   - Click the gear icon located in the top-right corner of the page.
   - Select **Account Integrations** from the dropdown menu.
   - Filter for **Automation**.
   - Click on the **Zapier** tile.
2. **Initiating Zap Creation:**

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

Step 2: Choosing 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: Configuring 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 when a visitor has finished interacting with your routing form.
2. Complete the test step to ensure the trigger functions correctly.

Step 4: Mapping Data to Your Application

1. In the Action for the destination application, proceed to its **Configure** step.
2. Add values to required fields by clicking the **+** to insert data.
   - Form submission fields that you created will be labeled as Custom Fields and at the bottom of the list in the pop-up.
3. Click **Continue** once you are done mapping data to your application.
4. Complete the test step to ensure the data is successfully sent to your application.

Step 5: Publishing the Zap

Once you are happy with your configuration, click on **Publish** to turn on the Zap.