

Zapier Integration

Admin Manual

Version 1.0.1

November 2025



This document demonstrates how to use Guidebook’s Zapier Integration to connect information from a Google Sheet to a desired guide in Builder.

The integration is built with components from our [Open API](#).

A Zapier user on a free plan will be able to create Zaps between Google Sheet and Guidebook for Attendees and Sessions.

Creating and implementing Custom Lists with items into your guide with Zapier does involve a multi-step Zap, and therefore requires a paid Zapier plan.

Table of Contents

[Creating Attendee\(s\)](#)

[Google Sheet](#)

[Setting Up the Zap](#)

[Creating Session\(s\)](#)

[Google Sheet](#)

[Setting Up the Zap](#)

[Creating Custom List\(s\)](#)

[Google Sheet](#)

[Setting Up the Zap](#)

[Making Custom List a Menu Item](#)

[Creating Custom List Item\(s\)](#)

[Google Sheet](#)

[Setting Up the Zap](#)

[Connect Items to Main Custom List](#)

[Closing](#)

Creating Attendee(s)

Google Sheet

The Google Sheet will act as the source information for what will be fed through Zapier into Builder.

The source sheet is required to include emails and the guide ID of the guide where the attendees will be populated. Additional information that can be included in the sheet that will be pushed to Builder are: First Name, Last Name, and Import ID

Required Information: email and guide ID

Additional, but not required: first name, last name, import ID

Does not include: avatar, cover, app_profile, revoked or email opt out

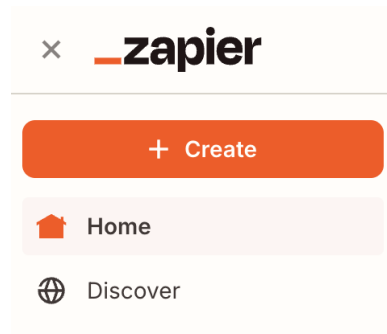
Here is an example of a sheet

	A	B	C	D	E
1	guide	email	first_name	last_name	import_ID
2	215906	SamaraLGibson@dayrep.com	Samara	Gibson	
3	215906	WillieTThiede@dayrep.com	Willie	Thiede	
4	215906	HaroldLScott@rhyta.com	Harold	Scott	
5	215906	PatriciaMVance@dayrep.com	Patricia	Vance	
6	215906	RichardLMcDermott@teleworm.us	Richard	McDermott	
7	215906	CindyJHarris@rhyta.com	Cindy	Harris	

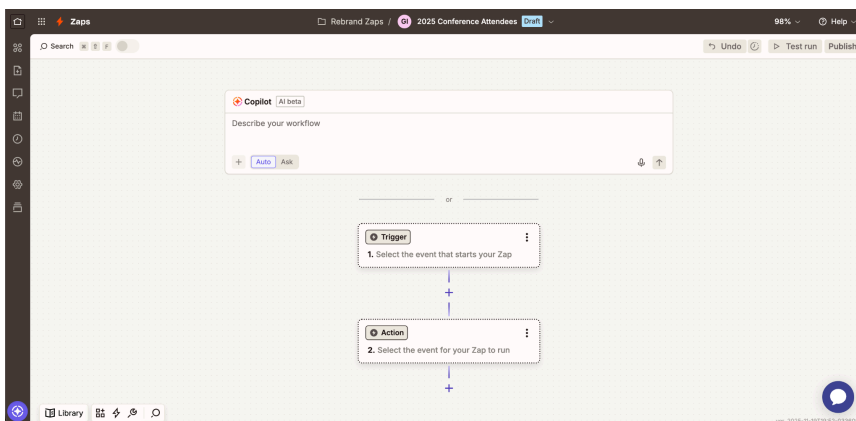
A sheet can have any other information in it. Later in the process you will decide which columns map to what fields in Builder. Column names do not need to be specific.

Setting Up the Zap

Within Zapier, you will create a new Zap to get started.

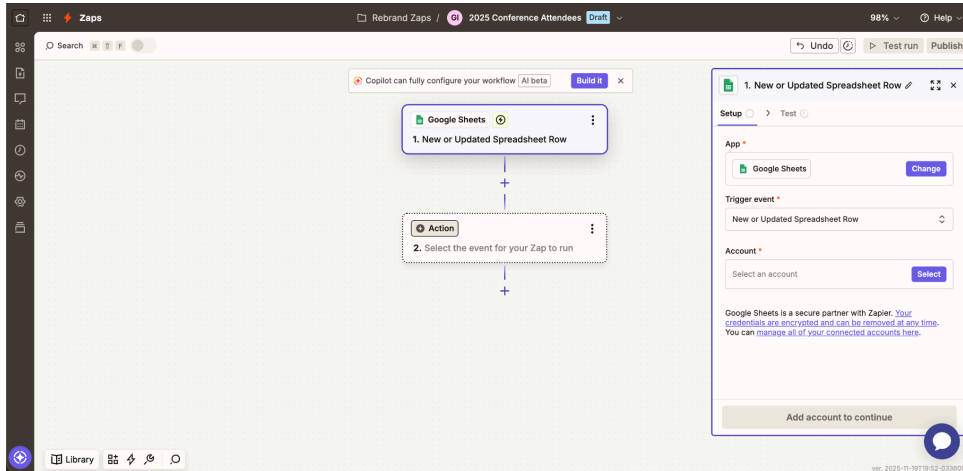


You will title your Zap and set up your initial Trigger.



Select Google Sheets. You will need to select a Google Sheets Event to be associated with the Trigger.

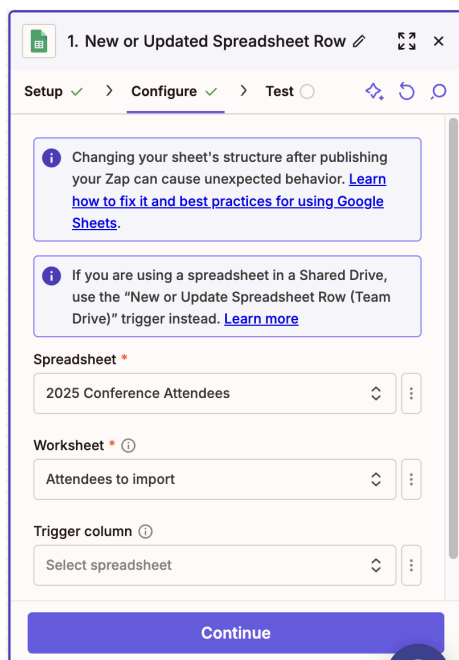
[Zapier Support Article: [How to set up your Google spreadsheet to work with Zapier](#)]



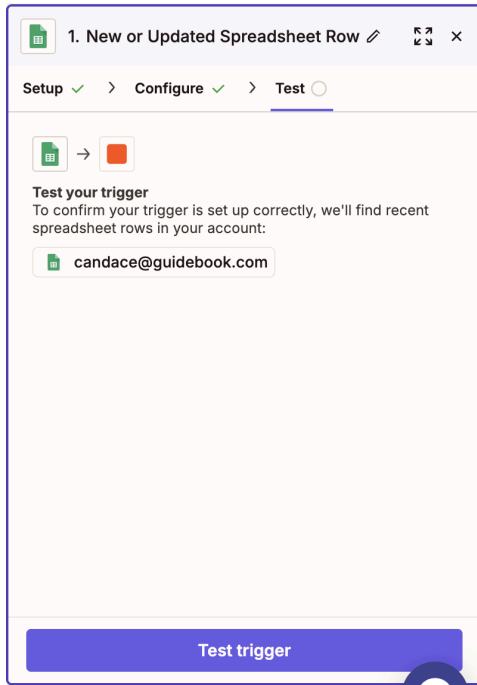
Go through the flow to connect the necessary Google Sheets account. **This account should have access to the source Google Sheet.**

Select the specific Spreadsheet and Worksheet (tab) that the Zap will be getting information from.

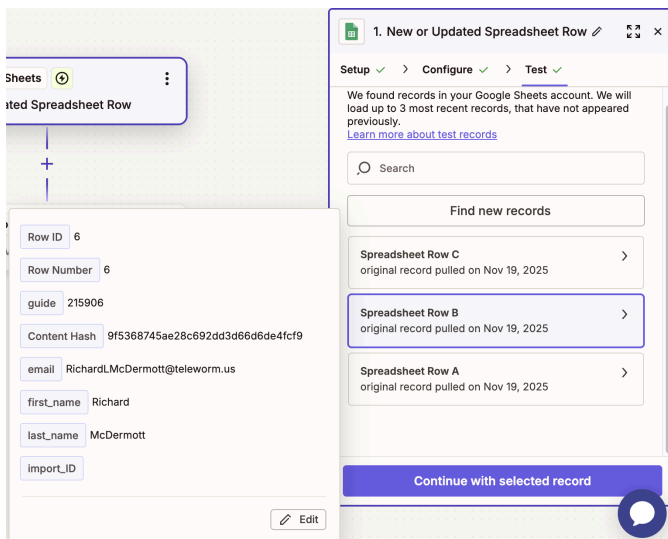
If you want the zap to trigger for changes on a specific column, select the column in the Trigger Column field. Leave this field blank if you want the Zap to trigger on changes to any column.



Zapier has a built in test process throughout the setup. This helps ensure any issues are caught proactively. Click the button to test the Trigger.

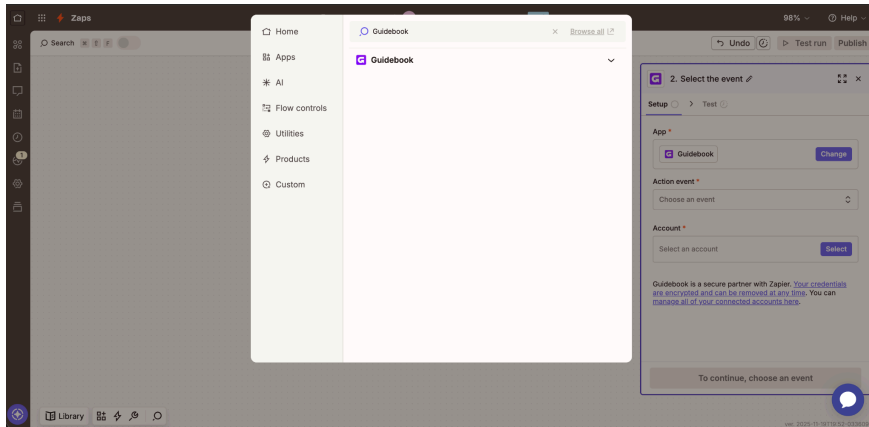


The test will pull a test record based on the choices you made in previous steps.



You're done with the Trigger!

You will now set up the Action you'd like to accomplish.

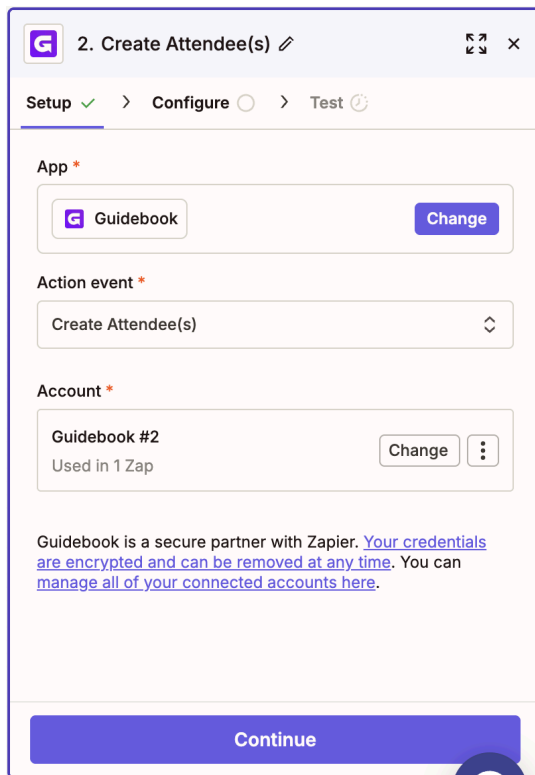


Select the Guidebook app (within Zapier). Select which Action Event you're setting up.

For this - it will be Create Attendee(s).

Go through the flow to connect the necessary Guidebook account.

You will need to have your [API Key](#).



You will now need to associate the columns in your Google Sheet with the information needed from Guidebook to complete the Action.

2. Create Attendee(s)

Setup ✓ > Configure ✓ > Test ⚠

Guide ID * ⓘ
123 1. guide: 215906 +

Email * ⓘ
1. email: RichardLMcDermott@teleworm.us +

First Name ⓘ
1. first_name: Richard +

Last Name ⓘ
1. last_name: McDermott +

Import ID ⓘ
null +

Continue

Note: I have used *null* for Import ID because I am not importing any values in this instance. The Zap is set up to pass this field as *null* if nothing is entered there.

The test will continue by using the test data that was previously found in your Google Sheet and it will send that single record to Guidebook.

2. Create Attendee(s)

Setup ✓ > Configure ✓ > Test ⚠

Send Attendee to Guidebook
To test Guidebook, we need to create a new attendee. This is what will be created:

Data in

Search item data...

Import ID null

guide 215906

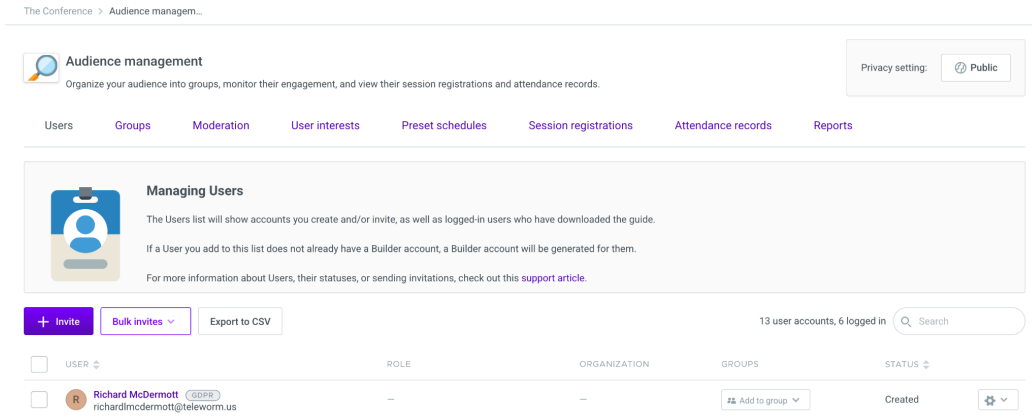
Email RichardLMcDermott@teleworm.us

First Name Richard

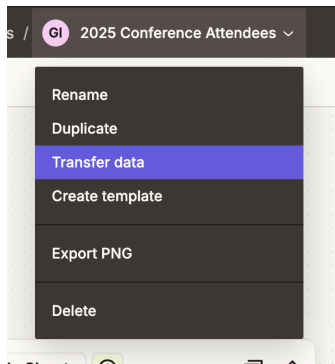
Last Name McDermott

Skip test Test step

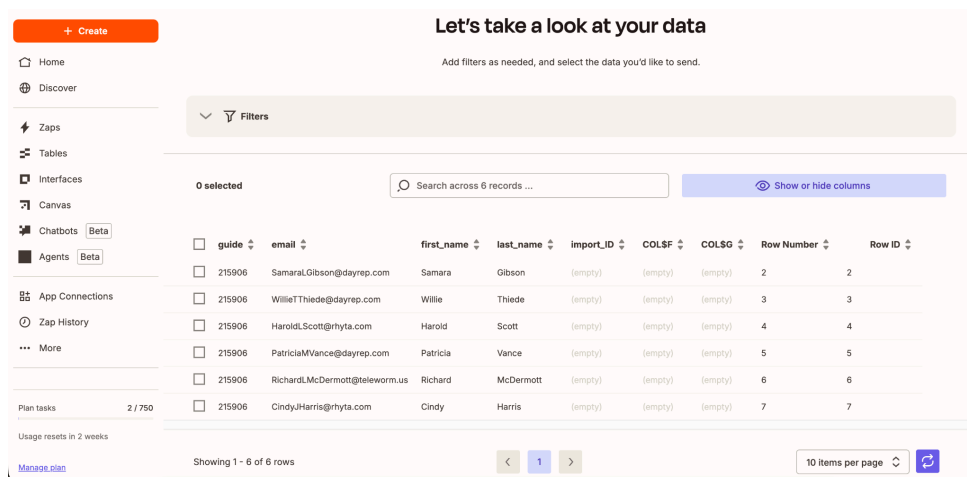
You can verify the test sent by checking the Audience Management section of the designated guide in Builder.



You will then **Publish your Zap!** If you already had data in your Google Sheet prior to setting this up, you should select “Transfer data” from the Zap title dropdown at the top of the Zap editor. Every new record added after set up to the Google Sheet will ‘zap’ through on its own.

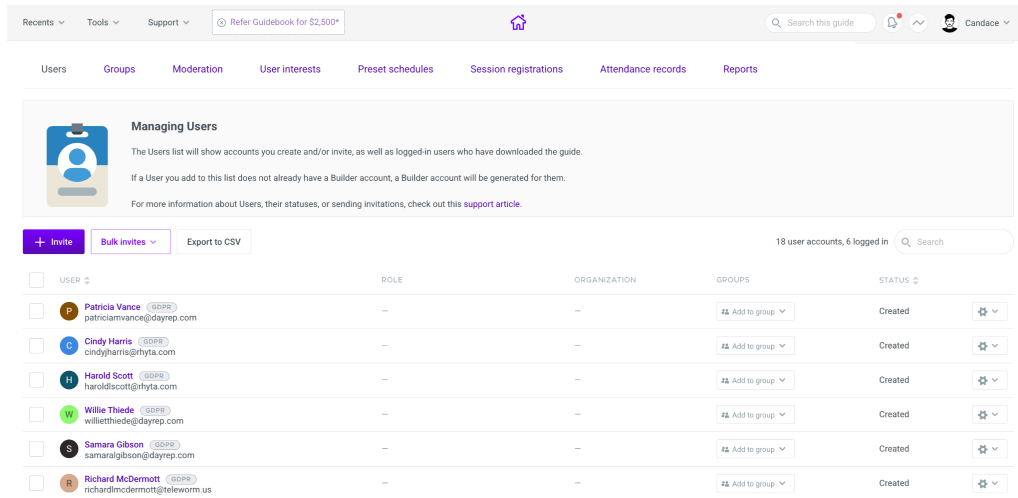


After selecting “Transfer data”, you will see all the imported existing data. You can “Select All” and click “Next” at the bottom right of your screen (button not shown in screenshot due to screen size).



Guidebook will ignore duplicates for Attendees, so you do not need to be concerned about whether an attendee record has been sent over more than once.

See that the test records sent over all populated in the Audience Management section of the guide successfully!



Creating Session(s)

Google Sheet

The Google Sheet will act as the source information for what will be fed through Zapier into Builder.

The source sheet is **required** to include the guide ID of the guide where the sessions will be populated, the session title, session description, session start date/time and session date/end time. Additional information that can be included in the sheet that will be pushed to Builder are: All Day Session (True or False), Require Login (True or False), Add to Schedule (True or False) and Import ID.

Required Information: guide ID, session title, session description, session start date & time, session end date & time

Additional, but not required: all day session, require login, add to schedule, import ID

Does not include: Locations, Schedule Tracks, Image, Rank, Allow Rating, Enable Waitlist, Max Capacity, Registration Start Date

start date & time and end date & time format: **YYYY-MM-DDThh:mm**

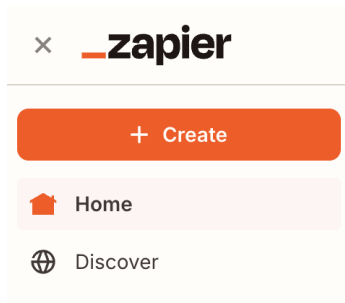
Here is an example of a sheet

	A	B	C	D	E	F
1	Guide ID	Session Title	Session Description	Start Date & Start Time	End Date & End Time	Import ID
2	215906	The Copywriting Event of the Year!	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec pretium nec dui fermentum varius. Cras iaculis sapien ac nisl mattis vulputate. Quisque ac velit dignissim, fermentum massa ut tincidunt.	2025-12-02 9:00	2025-12-02 9:15	xy73m
3	215906	In Observance of Television	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec pretium nec dui fermentum varius. Cras iaculis sapien ac nisl mattis vulputate. Quisque ac velit dignissim, fermentum massa ut tincidunt.	2025-11-28 15:45	2025-11-28 16:45	
4	215906	The Domain of Meeting	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec pretium nec dui fermentum varius. Cras iaculis sapien ac nisl mattis vulputate. Quisque ac velit dignissim, fermentum massa ut tincidunt.	2025-11-30 18:00	2025-11-30 21:00	vw4iy3
5	215906	The Hydration Innovation Forum	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec pretium nec dui fermentum varius. Cras iaculis sapien ac nisl mattis vulputate. Quisque ac velit dignissim, fermentum massa ut tincidunt.	2025-12-01 9:00	2025-12-01 13:00	
6	215906	Closing Reception	This is required for all attendees	2025-12-04 7:00	2025-12-04 9:00	
7	215906	Final Goodbyes	This is not required for all attendees	2025-12-04 10:00	2025-12-04 12:15	

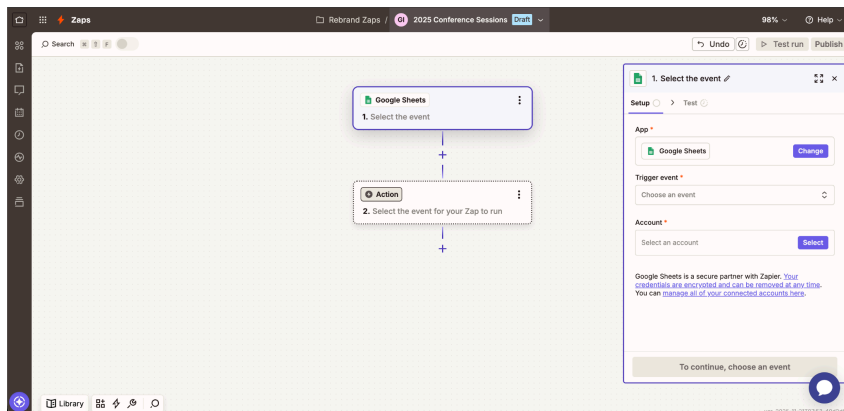
A sheet can have any other information in it. Later in the process you will decide which columns map to what fields in Builder. Column names do not need to be specific.

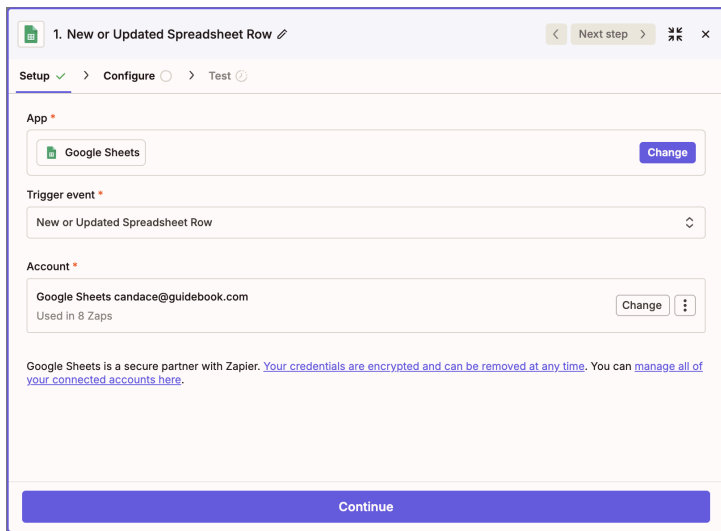
Setting Up the Zap

Within Zapier, you will create a new Zap to get started.



You will title your Zap and set up your initial Trigger.





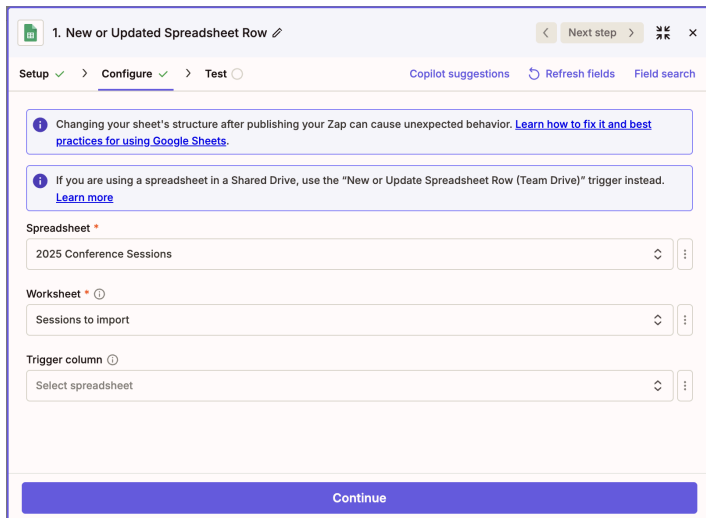
Select Google Sheets. You will need to select a Google Sheets Event to be associated with the Trigger.

[Zapier Support Article: [How to set up your Google spreadsheet to work with Zapier](#)]

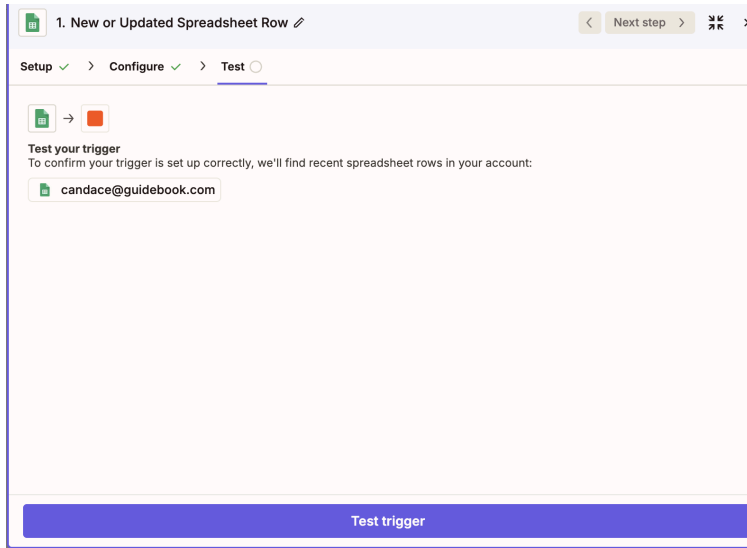
Go through the flow to connect the necessary Google Sheets account. This account should have access to the source Google Sheet.

Select the specific Spreadsheet and Worksheet (tab) that the Zap will be getting information from.

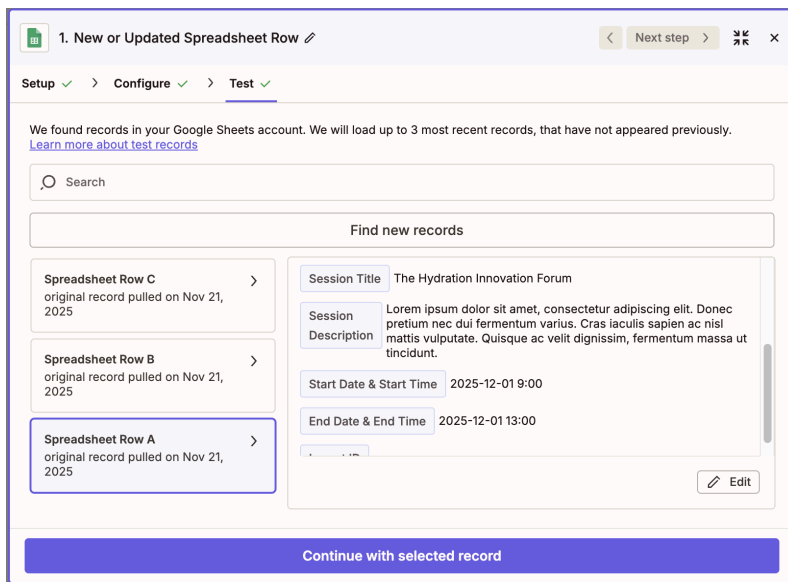
If you want the zap to trigger for changes on a specific column, select the column in the Trigger Column field. Leave this field blank if you want the Zap to trigger on changes to any column.



Zapier has built in test processes throughout. This helps ensure any issues are caught proactively. Click the button to test the Trigger.

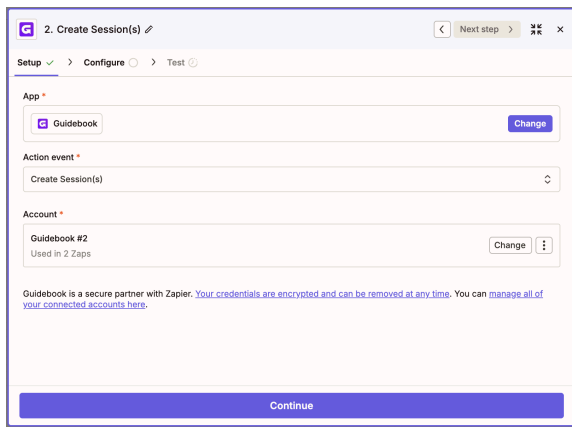


The test will pull a test record based on the choices you made in previous steps.



You're done with the Trigger!

You will now set up the Action you'd like to accomplish.

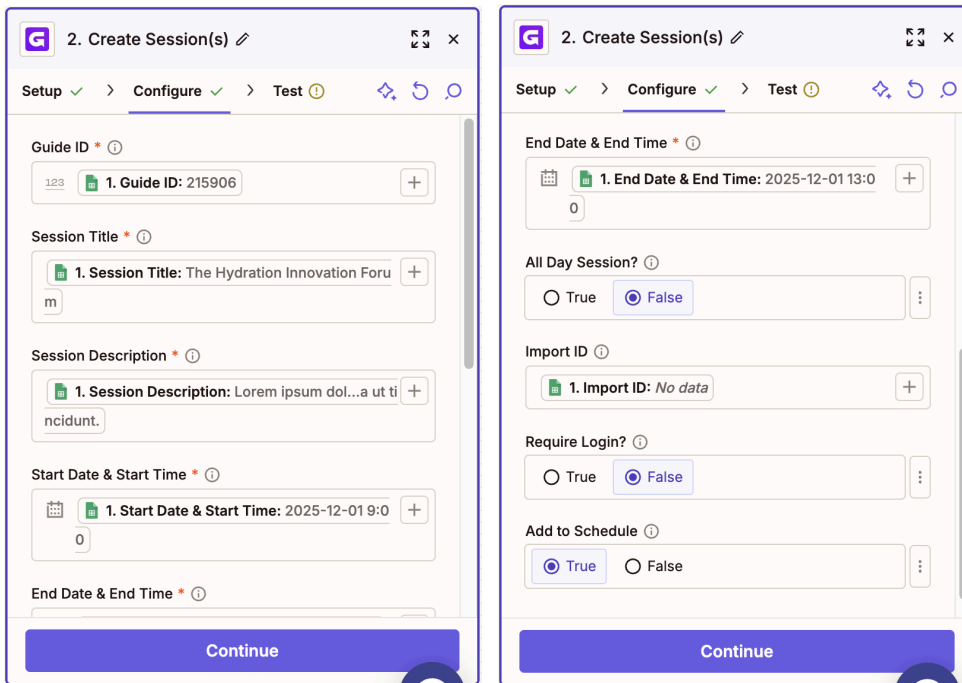


Select the Guidebook app (within Zapier). Select which Action Event you're setting up.

For this - it will be Creating Session(s).

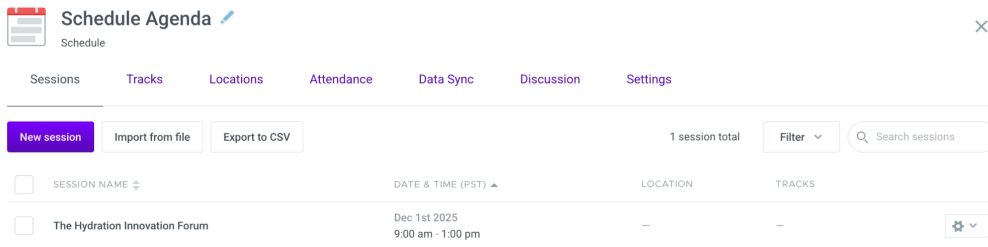
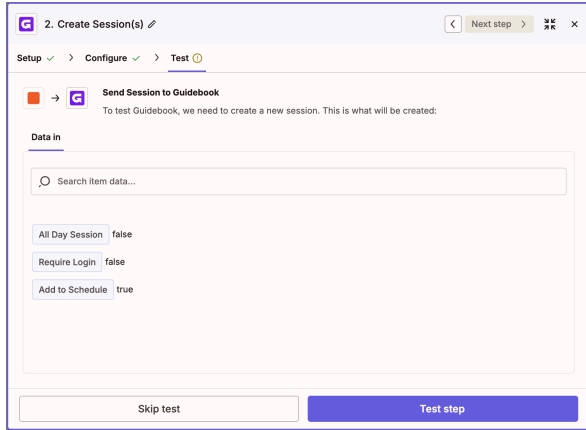
Go through the flow to connect the necessary Guidebook account.

You will need to have your [API Key](#).

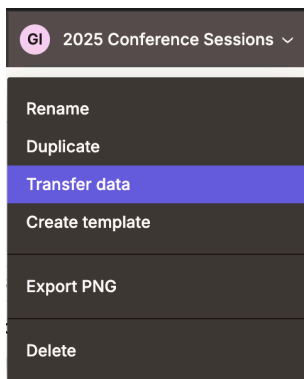


You will now need to associate the columns in your Google Sheet with the information needed from Guidebook required to complete the Action (images from the previous page).

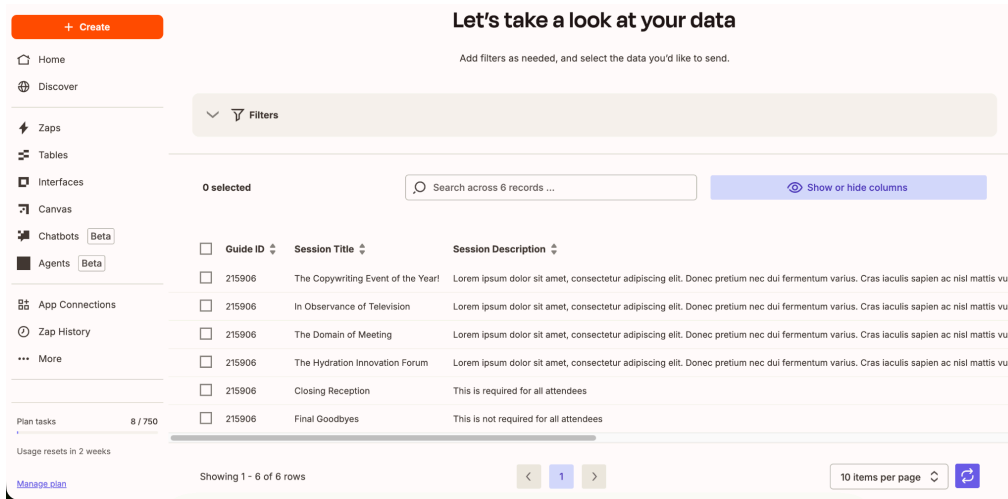
The test will continue by using the test data that was previously found in your Google Sheet and it will send that single record to Guidebook.



You will then Publish your Zap! If you already had data in your Google Sheet prior to setting this up, you should select “Transfer data” from the Zap title dropdown at the top of the Zap editor. Every new record added after set up to the Google Sheet will ‘zap’ through on its own.

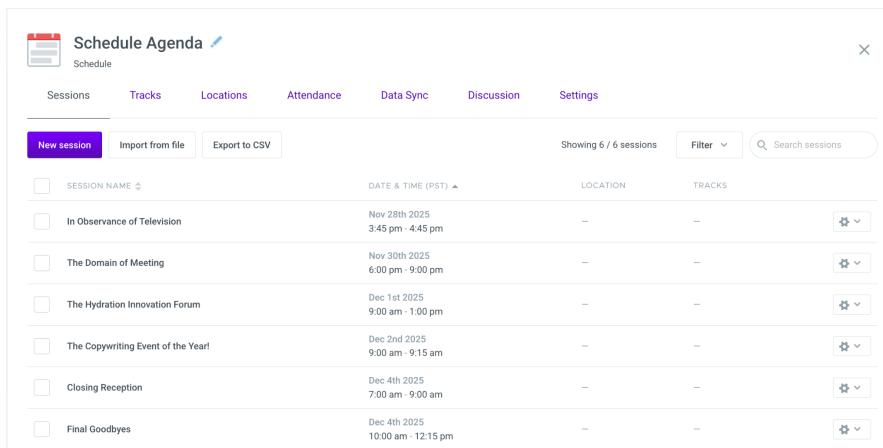


After selecting “Transfer data”, you will see all the imported existing data. You can “Select All” and click “Next” at the bottom right of your screen (button not shown in screenshot due to screen size).



Note: It will duplicate the data that was previously sent over in the test. Make sure you uncheck that row of data.

You can see in these that the data was successfully sent!



Creating Custom List(s)

In order to create and populate a Custom List, you will first need to set up a Zap that creates a Custom List. You can create multiple Custom List Menu Items with this Zap.

Populating the list with items will be a separate Zap.

Google Sheet

The Google Sheet will act as the source information for what will be fed through Zapier into Builder.

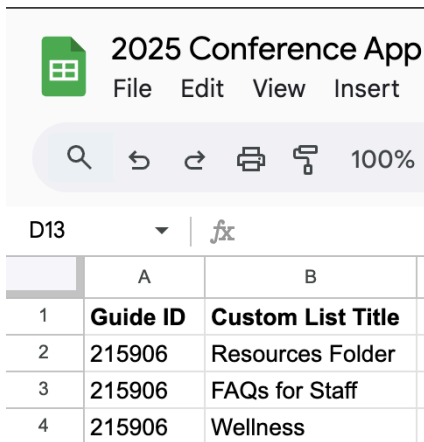
The source sheet is required to include the guide ID of the guide where the Custom List will be populated and the Custom List title. Additional information that can be included in the sheet that will be pushed to Builder is: Import ID.

Required Information: guide ID, and custom list title

Additional, but not required: import ID

Does not include: allow rating, disable to do

Here is an example of a sheet



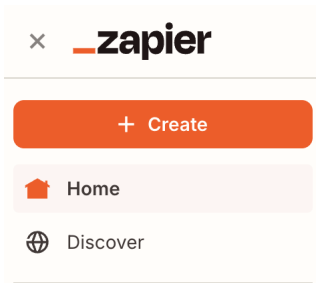
The screenshot shows a Google Sheet interface for a document titled "2025 Conference App". The sheet contains a table with two columns: "Guide ID" and "Custom List Title". The data rows are as follows:

	A	B
1	Guide ID	Custom List Title
2	215906	Resources Folder
3	215906	FAQs for Staff
4	215906	Wellness

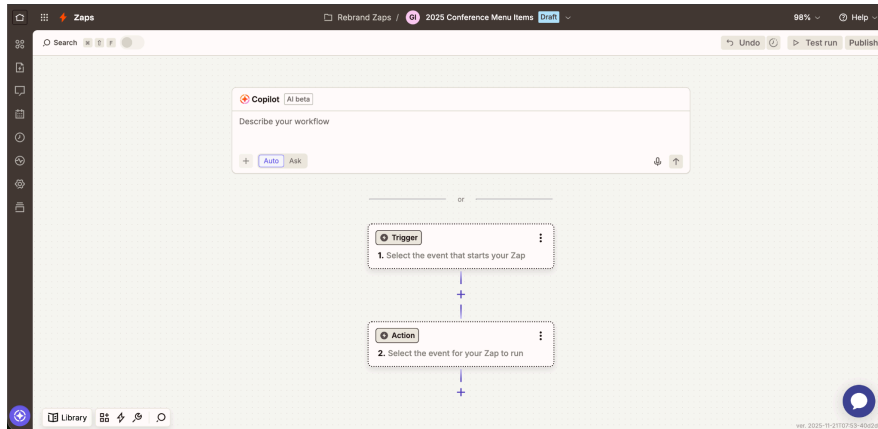
A sheet can have any other information in it. Later in the process you will decide which columns map to what fields in Builder. Column names do not need to be specific.

Setting Up the Zap

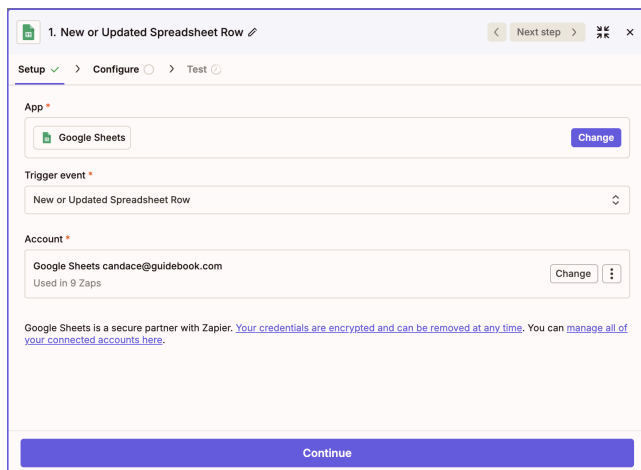
Within Zapier, you will create a new Zap to get started.



You will title your Zap and set up your initial Trigger.

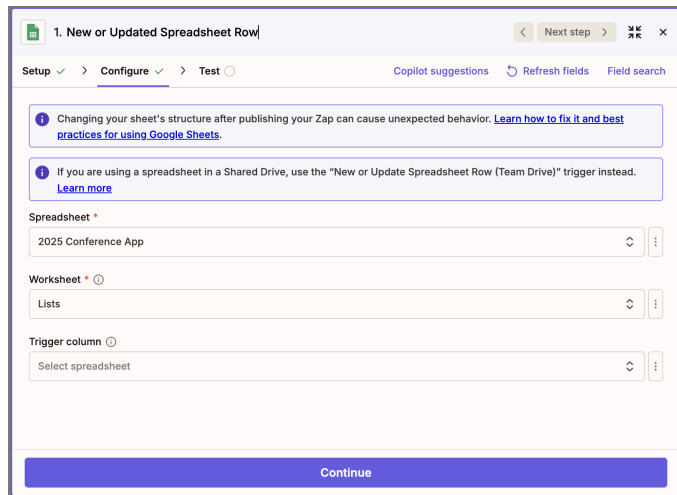


Select Google Sheets. You will need to select a Google Sheets Event to be associated with the Trigger.



[Zapier Support Article: [How to set up your Google spreadsheet to work with Zapier](#)]

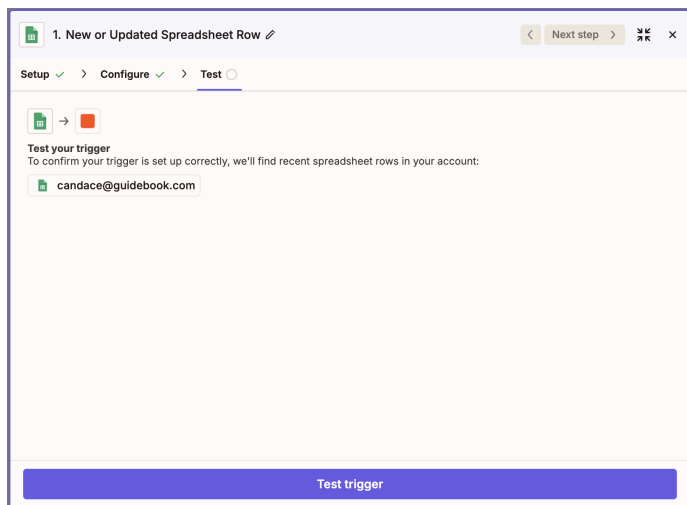
Go through the flow to connect the necessary Google Sheets account. This account should have access to the source Google Sheet.



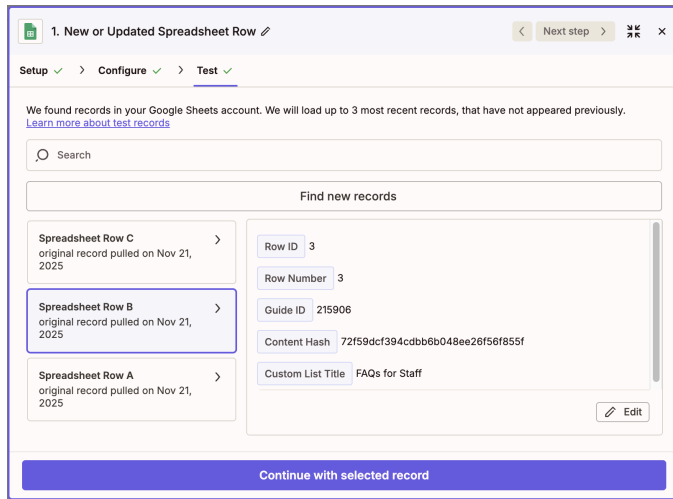
Select the specific Spreadsheet and Worksheet (tab) that the Zap will be getting information from.

If you want the zap to trigger for changes on a specific column, select the column in the Trigger Column field. Leave this field blank if you want the Zap to trigger on changes to any column.

Zapier has a built in test process throughout the setup. This helps ensure any issues are caught proactively. Click the button to test the Trigger.



The test will pull a test record based on the choices you made in previous steps.

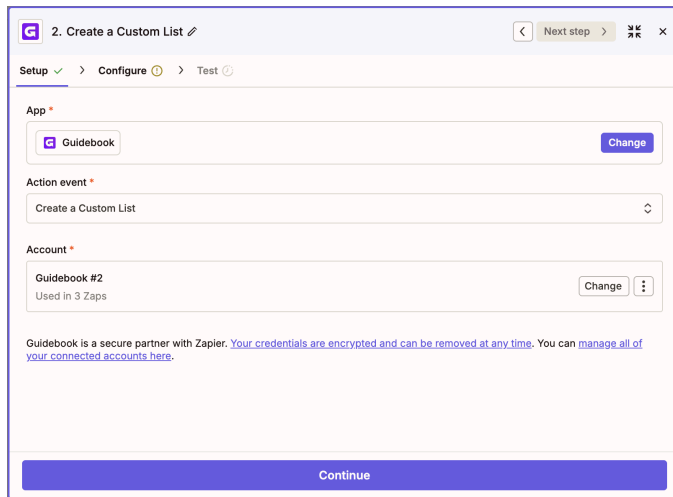


You're done with the Trigger!

You will now set up the Action you'd like to accomplish.

Select the Guidebook app (within Zapier). Select which Action Event you're setting up.

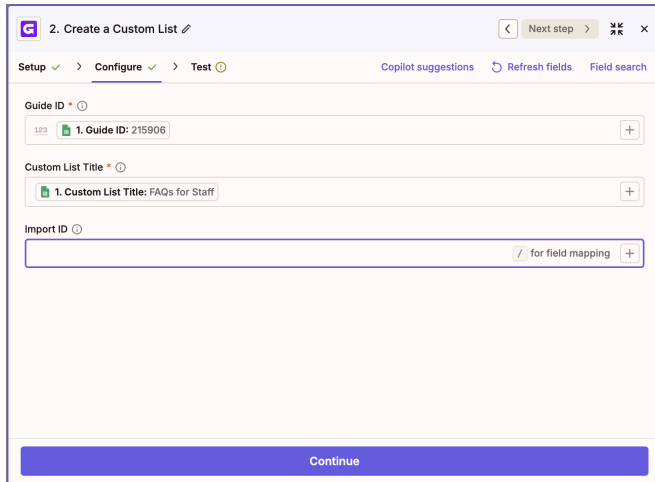
For this - it will be Create a Custom List.



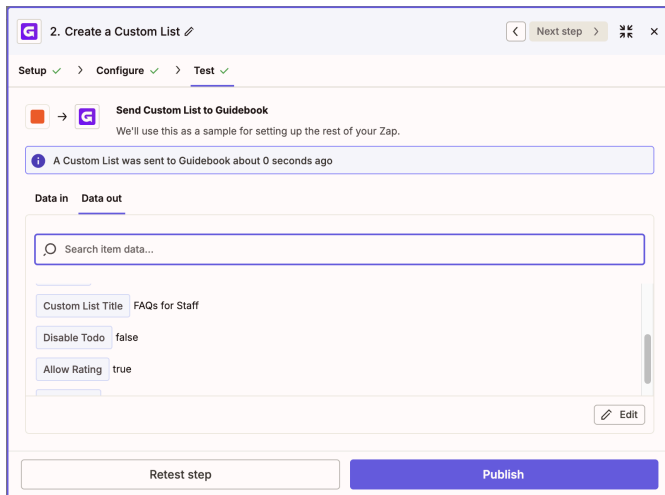
Go through the flow to connect the necessary Guidebook account, if needed.

You will need to have your [API Key](#).

You will now need to associate the columns in your Google Sheet with the information needed from Guidebook to complete the Action.



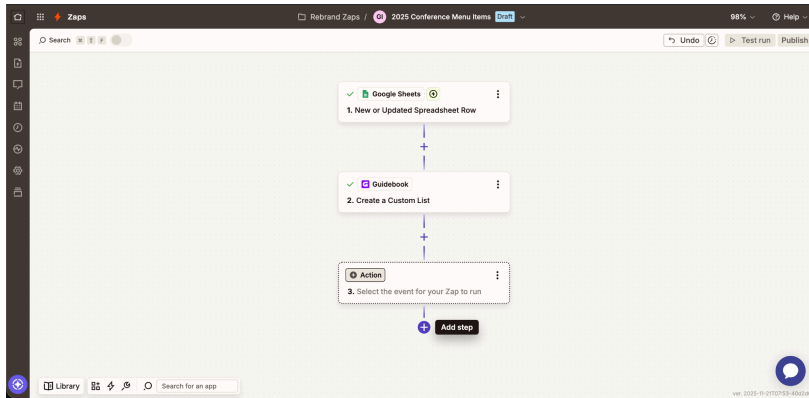
The test will continue by using the test data that was previously found in your Google Sheet and it will send that single record to Guidebook.



You can close this action.

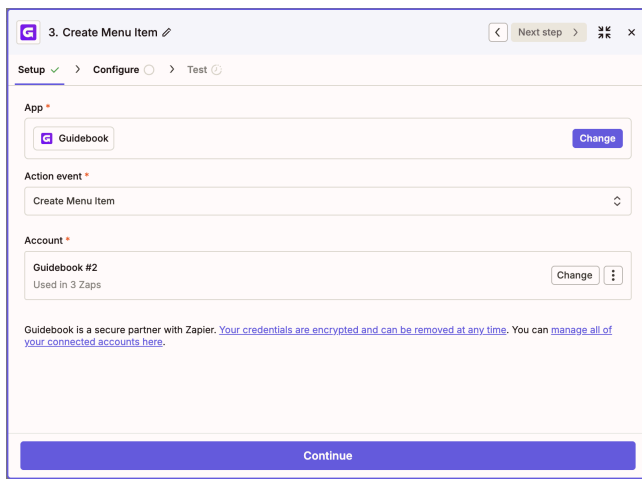
Making Custom List a Menu Item

Before you see the Custom List in Builder, you will need to make it a menu item. You will click the plus to add another action.



Select the Guidebook app (within Zapier).

Select Action Event - Create Menu Item.



You can populate the guide ID from either your source sheet or the returned fields from your first Action.

To create a Custom List menu item, you will select **custom_list.customlist** as the Content Type.

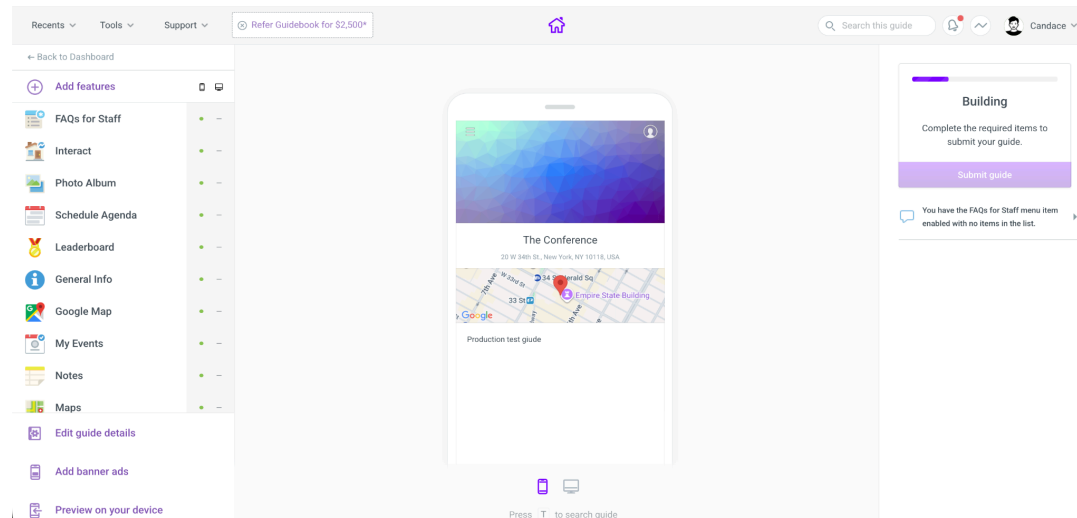
You will populate the Object ID with the Custom List ID from the returned fields from your first Action.

The screenshot shows the configuration step '3. Create Menu Item' in Zapier. The 'Guide ID' field is populated with '1. Guide ID: 215906'. The 'Content Type' dropdown is set to 'custom_list.customlist'. The 'Object ID' field is populated with '2. Custom List ID: 1187708'. A 'Continue' button is visible at the bottom.

The test will continue and use the test data to complete this Action

The screenshot shows the test interface for the '3. Create Menu Item' step. It displays a success message: 'A Menu item was sent to Guidebook about in 0 seconds'. Below this, the 'Data out' section shows the following fields: 'Name En US' with the value 'FAQs for Staff', 'Enabled' with the value 'true', and 'Custom List ID' with the value '1187708'. There is an 'Edit' button for the data. At the bottom, there are 'Retest step' and 'Publish' buttons.

You can see the Custom List on your Menu in Builder!



Copy and/or take note of the **object_id** value, you will need it when setting up your Zap to populate Custom List items. This **object_id** value is the same and will be referred to as Custom List ID.

You will then **Publish your Zap!** Every new record added after set up to the Google Sheet will 'zap' through on its own.

Creating Custom List Item(s)

To add Custom List Item(s) to the Custom List you just made, you will create a new Zap.

 **You will need to create separate Zaps to add items to different Custom Lists.**

Google Sheet

The Google Sheet will act as the source information for what will be fed through Zapier into Builder.

The source sheet is required to include the guide ID of the guide where the items will be populated, Custom List ID, item title, and item description. Additional information that can

be included in the sheet that will be pushed to Builder are: Item subtitle, Import ID, and Contact Email

Required Information: guide ID, custom list ID, item title, item description
Additional, but not required: item subtitle, import ID, contact email
Does not include: allow rating, locations, image, thumbnail

Here is an example of a sheet

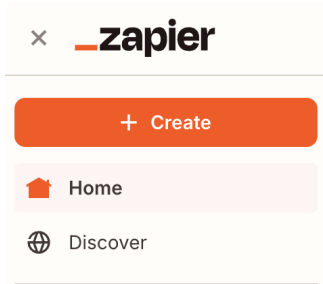
	A	B	C	D	E	F	G
1	Guide ID	List ID	Speaker	Subtitle	Description	Import ID	Contact Email
2	215906	1187708	Incident Reporting	A form or dedicated section for logging issues (medical, security, technical failures)	Documenting problems and ensuring proper follow-up.	2F4E9D	
3	215906	1187708	Checklist	Staff member's assigned duties, breaks, and shift coverage.	Staying on task and ensuring all roles are covered throughout the event.	7J9L-K5B	
4	215906	1187708	Lost & Found Log	A list or system for documenting items that have been found or reported lost.	Efficiently reuniting attendees with their possessions.		leo.murphy@zmailpro.com
5	215906	1187708	Media / VIP Tracker	A list of pre-registered media members and notable VIPs, often with their assigned escorts or access levels.	Identifying and properly managing key guests and press, ensuring smooth interactions.		marketing_team_42@bizcorp.org
6	215906	1187708	Inventory Sign-Out Sheet	A log for tracking the distribution and return of event assets (radios, keys, tablets, uniforms).	Maintaining accountability for valuable equipment and ensuring everything is returned post-event.	IMP-A8T2	
7	215906	1187708	Accessibility Guide	Detailed information on accessible routes, quiet rooms, and procedures for assisting attendees with special needs.	Ensuring the event is inclusive and providing consistent, high-quality support to all attendees.		
8	215906	1187708	Vendor/Supplier Contact List	Directory of non-staff personnel (caterers, security contractors, rental companies).	Quickly reaching external partners for setup issues, deliveries, or urgent changes.		wanderlust_annie@cloudmail.net

Your Custom List ID is the same Custom List ID you used to create the Custom List in the previous Zap steps. It may also be referred to as the Object ID. You will need to manually enter this number into your spreadsheet.

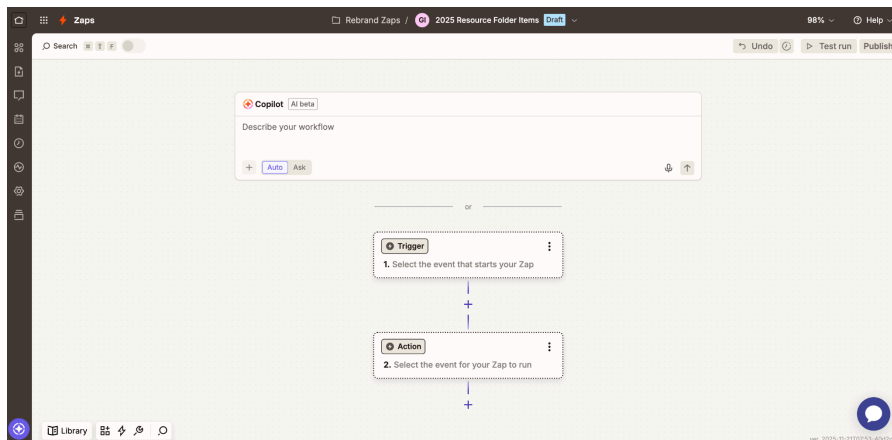
A sheet can have any other information in it. Later in the process you will decide which columns map to what fields in Builder. Column names do not need to be specific.

Setting Up the Zap

Within Zapier, you will create a new Zap to get started.

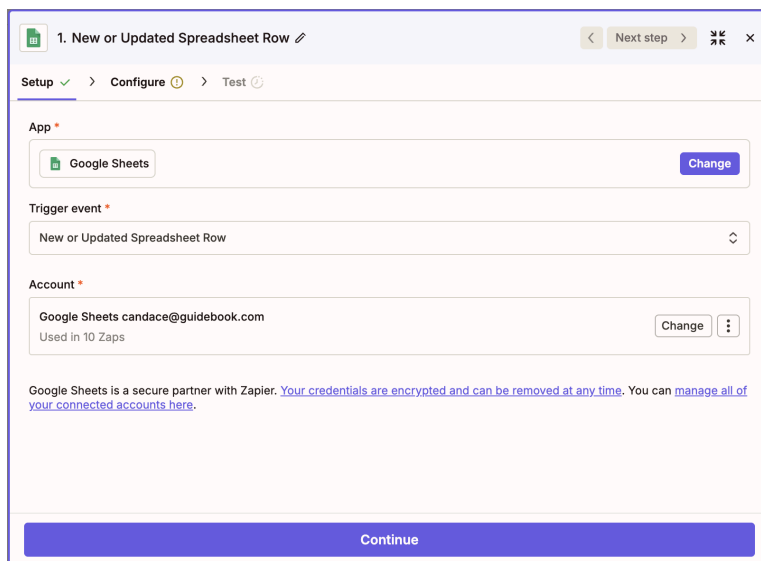


You will title your Zap and set up your initial Trigger.



Select Google Sheets. You will need to select a Google Sheets Event to be associated with the Trigger.

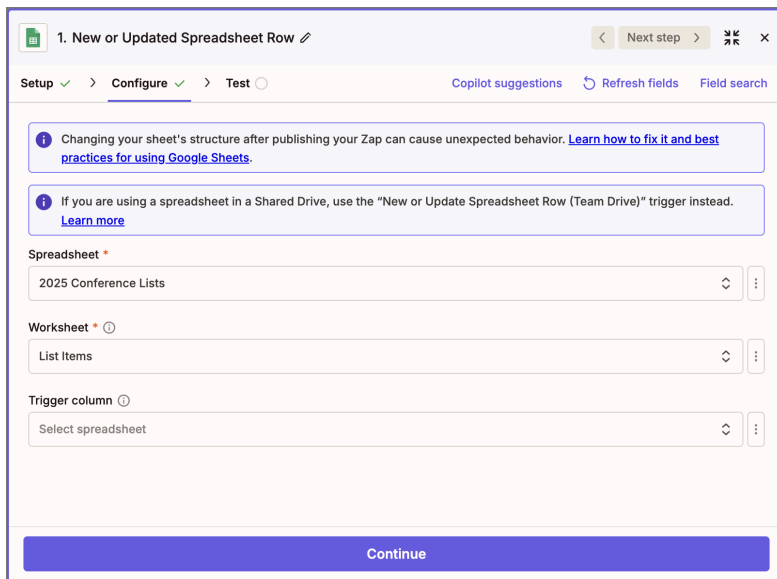
[Zapier Support Article: [How to set up your Google spreadsheet to work with Zapier](#)]



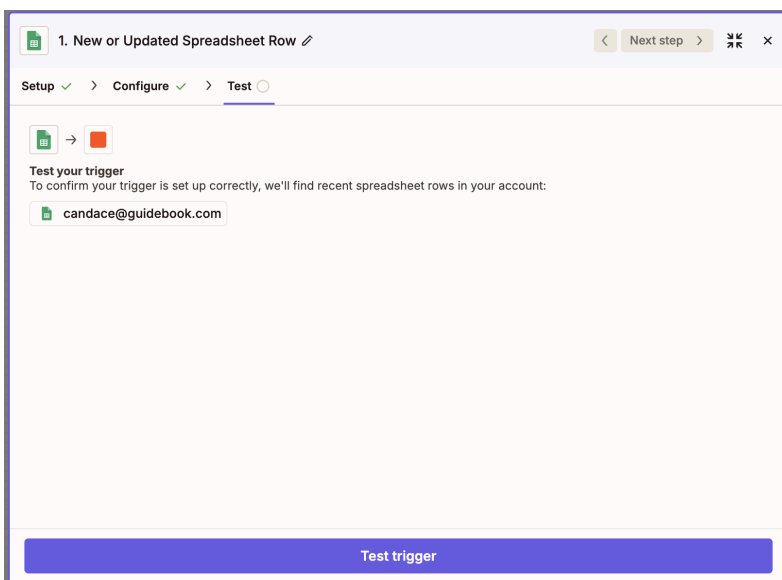
Go through the flow to connect the necessary Google Sheets account. This account should have access to the source Google Sheet.

Select the specific Spreadsheet and Worksheet (tab) that the Zap will be getting information from.

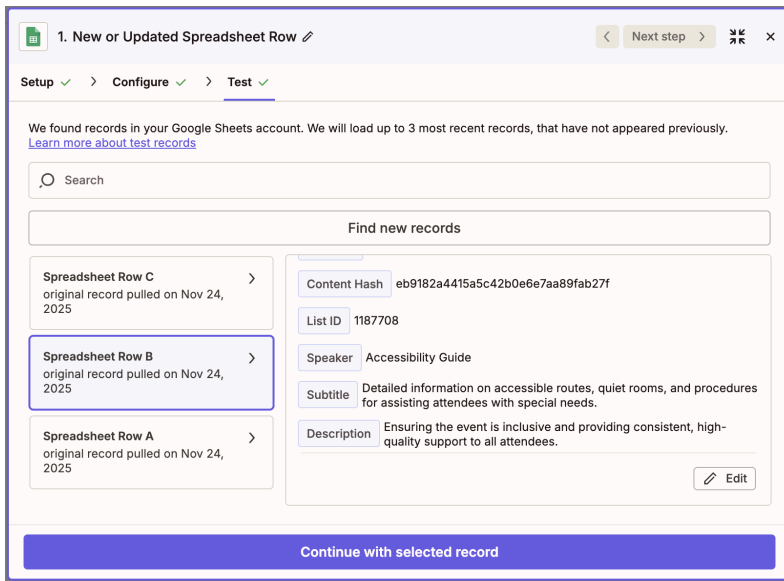
If you want the zap to trigger for changes on a specific column, select the column in the Trigger Column field. Leave this field blank if you want the Zap to trigger on changes to any column.



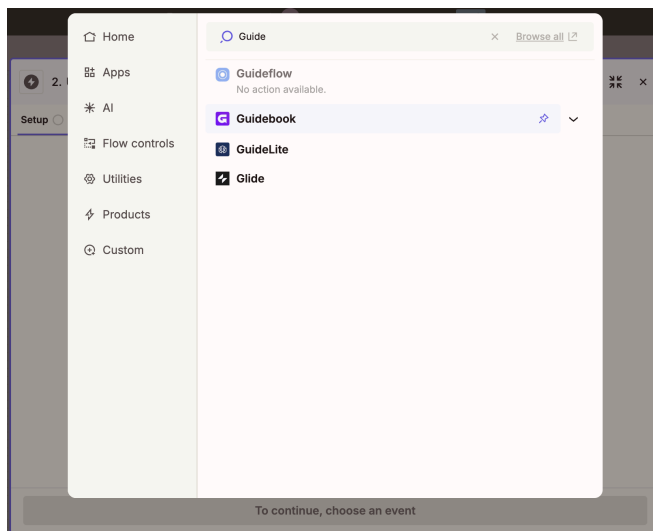
Zapier has built in test processes throughout. This helps ensure any issues are caught proactively. Click the button to test the Trigger.



The test will pull a test record based on the choices you made in previous steps.

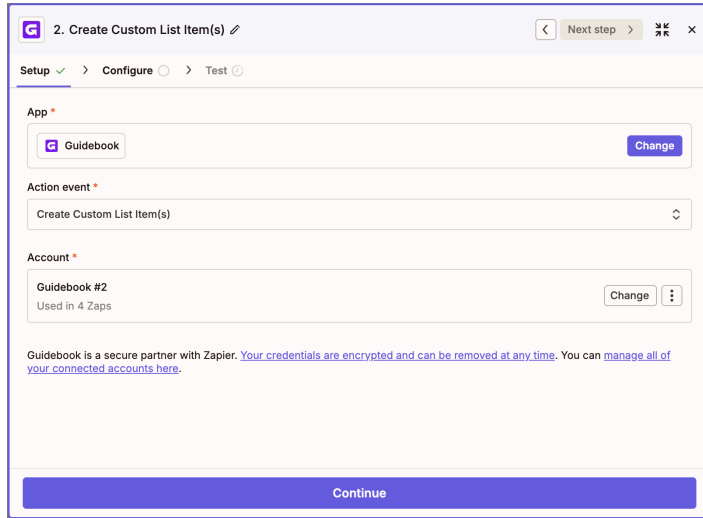


You're done with the Trigger!



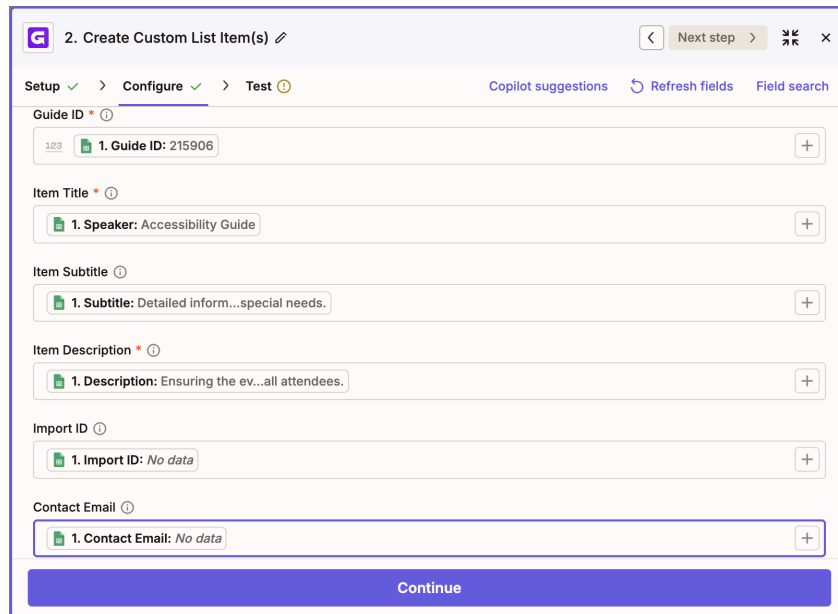
You will now set up the Action you'd like to accomplish. Search for Guidebook from the list of available Apps.

Select the Guidebook app (within Zapier). Select which Action Event you're setting up. For this - it will be Create Custom List Item(s).



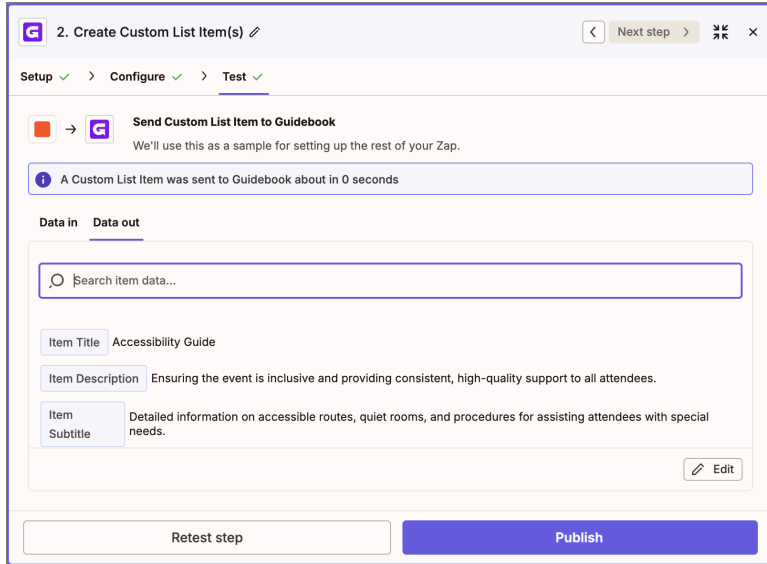
Go through the flow to connect the necessary Guidebook account. You will need to have your [API Key](#).

You will now need to associate the columns in your Google Sheet with the information needed from Guidebook for the Action.



The test will continue by using the test data that was previously found in your Google Sheet and it will send that single record to Guidebook.

You won't see it in Builder just yet!

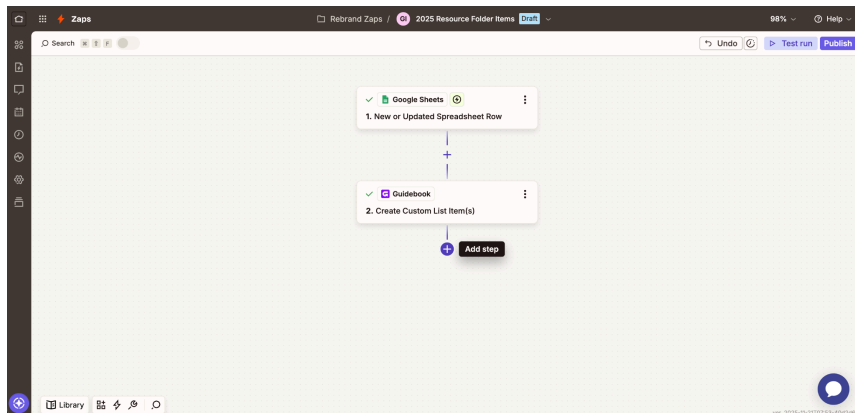


You can close this action.

Connect Items to Main Custom List

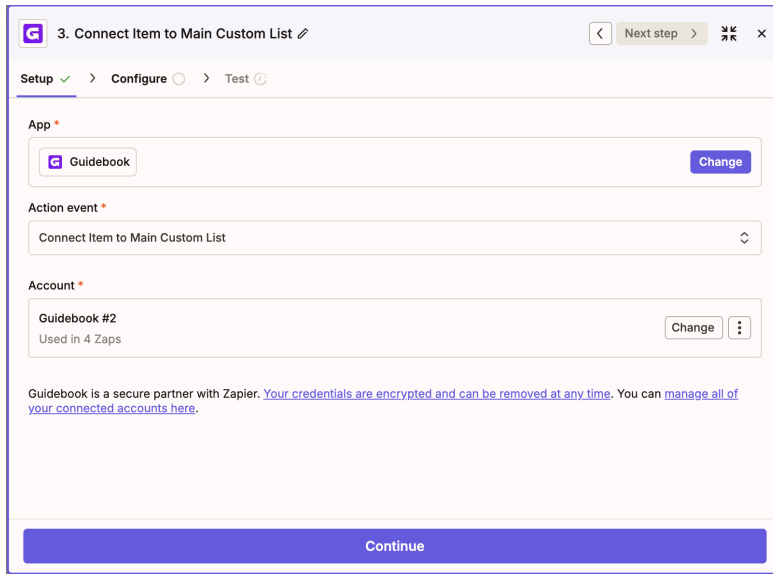
Before you see the Custom List item in Builder, you will need to connect the items to the parent Custom List.

You will click the plus to add another Action.



Select the Guidebook app (within Zapier).

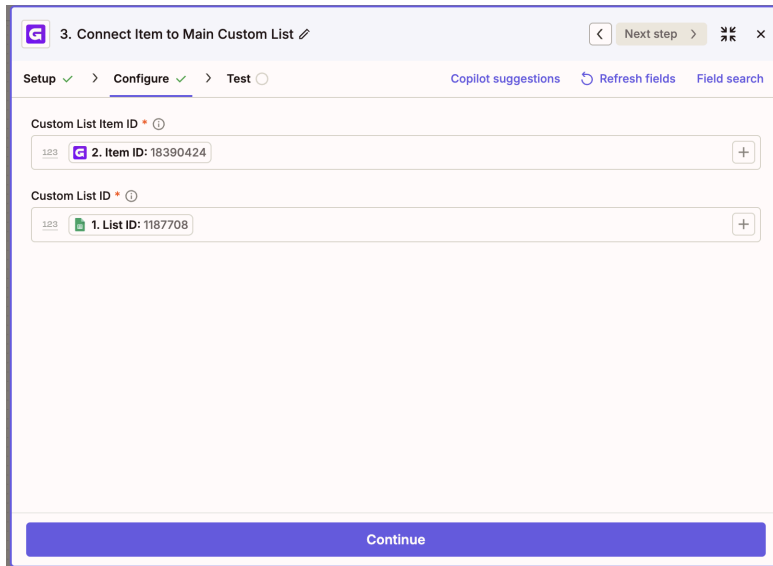
Select Action Event - Connect Item to Main Custom List.



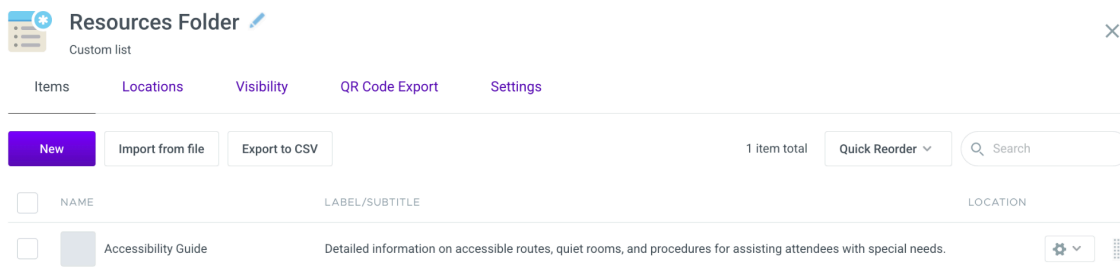
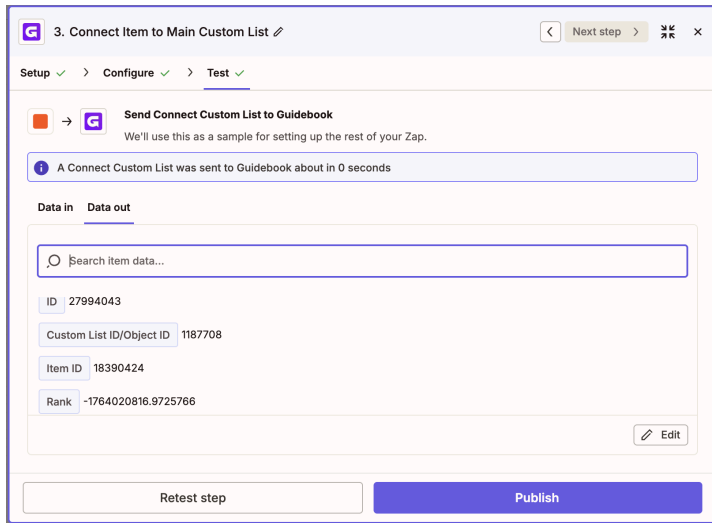
Go through the flow to connect the necessary Guidebook account, if needed.

You will populate the Custom List Item ID from the returned fields from your first action.

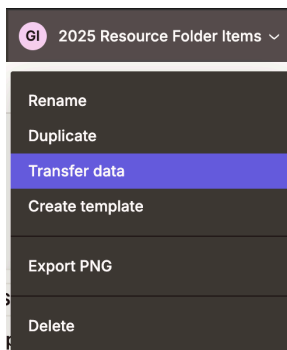
You will populate the Custom List ID from the column in your source Sheet.



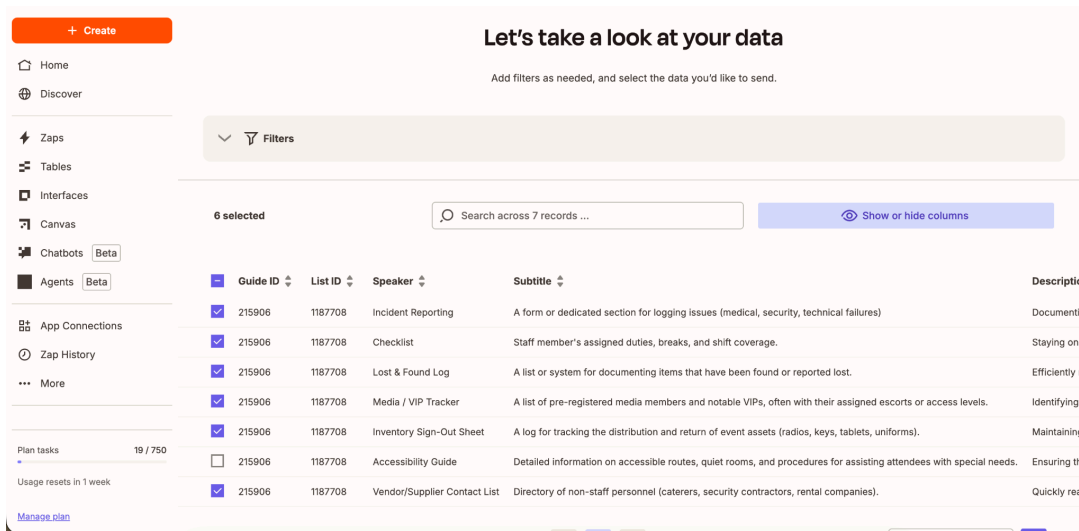
The test will continue and use the test data to complete this Action. You can verify the test data is sent in Builder!



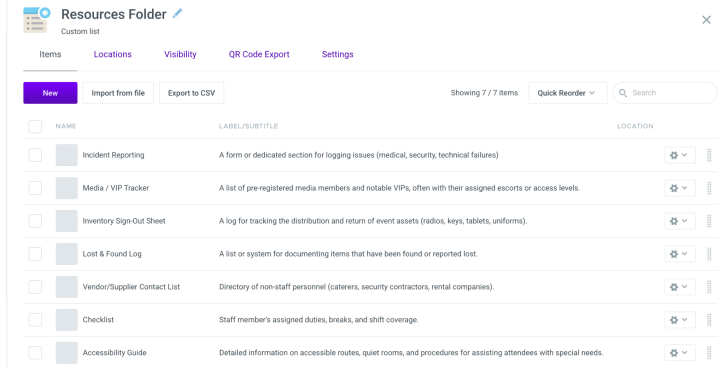
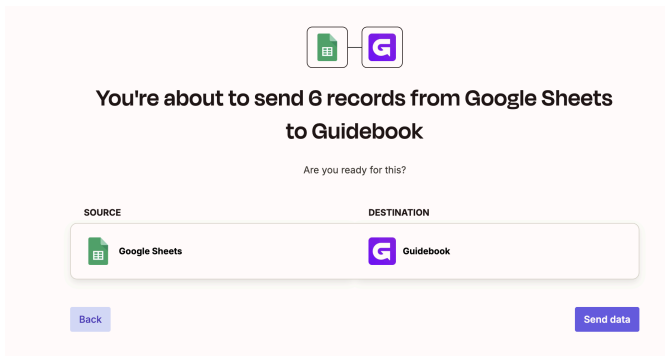
You will then Publish your Zap! If you already had data in your Google Sheet prior to setting this up, you should select “Transfer data” from the Zap title dropdown at the top of the Zap editor. Every new record added after set up to the Google Sheet will ‘zap’ through on its own.



After selecting “Transfer data”, you will see all the imported existing data. You can “Select All” and click “Next” at the bottom right of your screen (this screenshot does not include the button).



Note: It will duplicate the data that was previously sent over in the test. Make sure you uncheck that row of data



You can see in these that the data was successfully sent!

Closing

This manual has instructed you on setting up **Zaps** using the Guidebook's Zapier integration.

Integration Scope (First Iteration):

The current integration connects information from a **Google Sheet** to a desired guide in Builder, enabling the creation of:

- Attendees
- Sessions
- Custom Lists & Custom List Items

Technical Support:

If you encounter any problems while implementing or running your Guidebook Zapier integration, please contact our support team directly at:

Email: zapier@guidebook.com