

Zapier Integration

Version 1.0.0

July 2023



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.

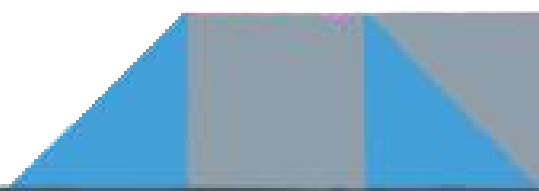


Table of Contents

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

[Google Sheet](#)

[Setting Up the Zap](#)

[Adding Attendees after Zap is Active](#)

[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](#)

[Adding List Items after Zap is Active](#)

Creating Attendee(s)

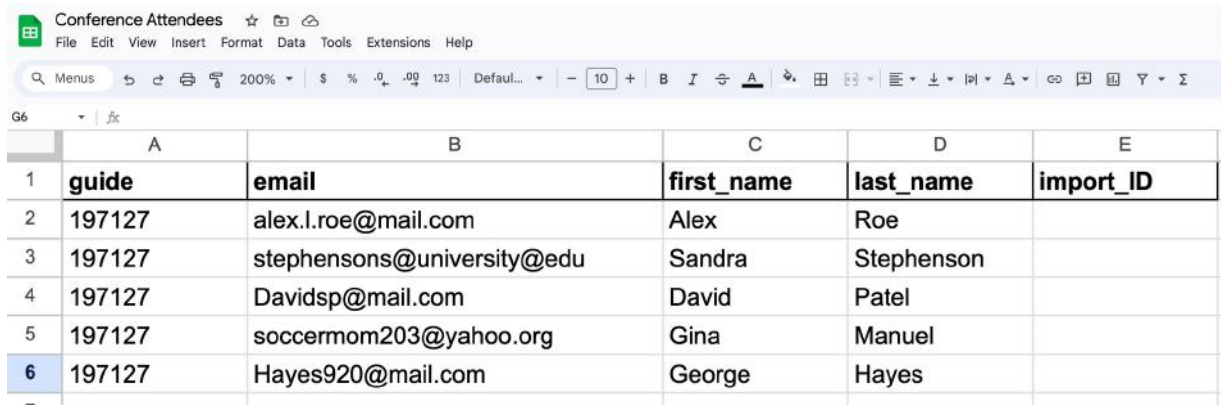
Google Sheet

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

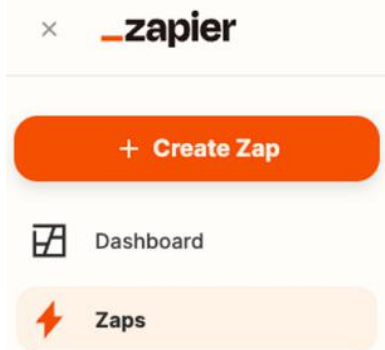


	A	B	C	D	E
1	guide	email	first_name	last_name	import_ID
2	197127	alex.l.roe@mail.com	Alex	Roe	
3	197127	stephensons@university@edu	Sandra	Stephenson	
4	197127	Davidsp@mail.com	David	Patel	
5	197127	soccermom203@yahoo.org	Gina	Manuel	
6	197127	Hayes920@mail.com	George	Hayes	

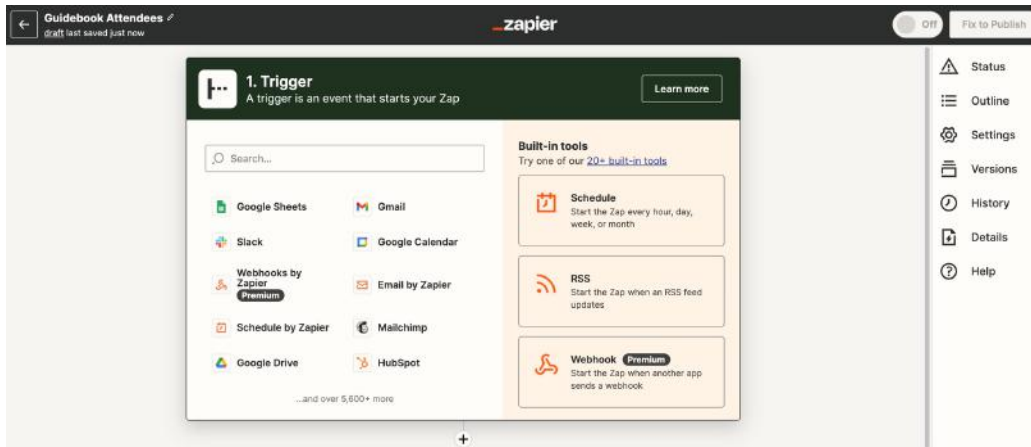
A sheet can have any other information in it. Later in the process you will decide which columns map to what fields in Builder. Column names do not need to be specific.

Setting Up the Zap

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

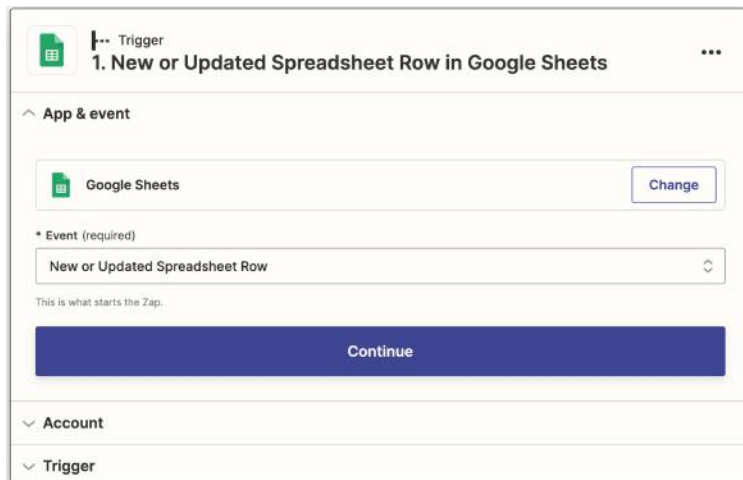


You will title your Zap and set up your initial Trigger.



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](#)]



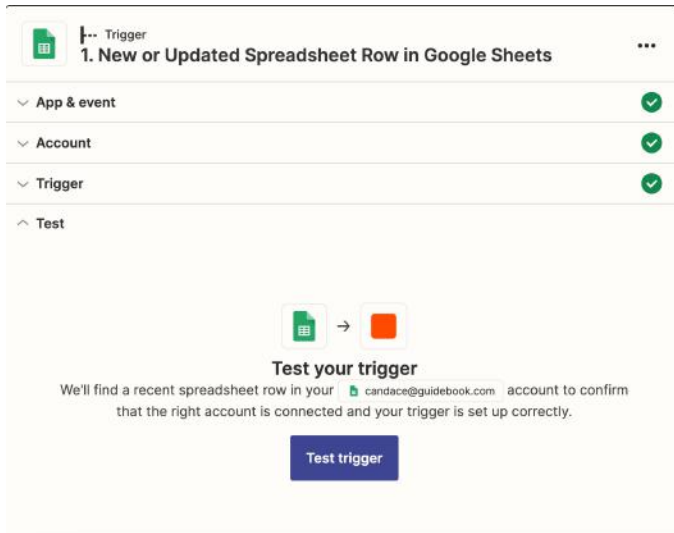
Go through the flow to connect the necessary Google Sheets account. This account should have access to the source Google Sheet.

The screenshot shows the Zapier configuration interface for a trigger. At the top, it says "Trigger" and "1. New or Updated Spreadsheet Row in Google Sheets". Below this, there are three sections: "App & event" with a green checkmark, "Account" with a dropdown arrow, and "Trigger" with a dropdown arrow. The "Account" section is expanded, showing a connected account: "Google Sheets candace@guidebook.com" with a "Change" button and a three-dot menu. Below the account information, there is a "Continue" button. A small note below the account says: "Google Sheets is a secure partner with Zapier. Your credentials are encrypted & can be removed at any time. You can manage all of your connected accounts here."

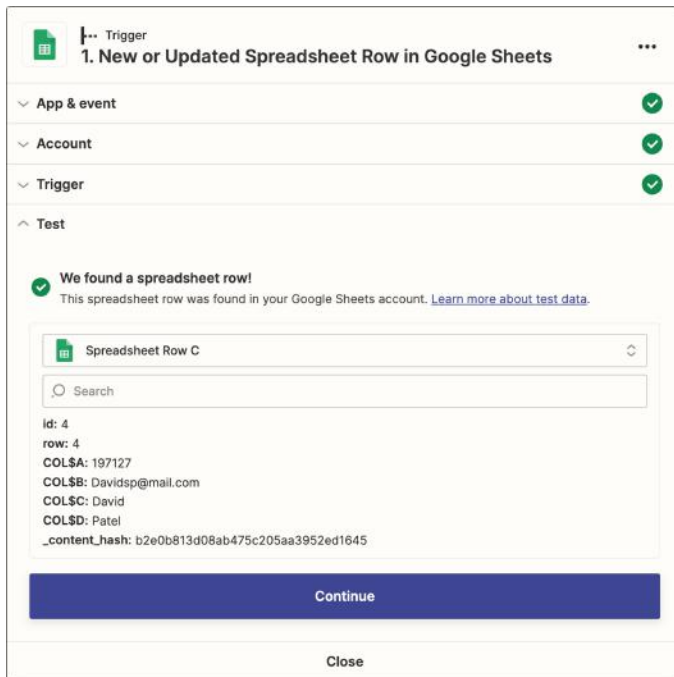
Select the specific Spreadsheet and Worksheet that the Zap will be getting information from.

The screenshot shows the Zapier configuration interface for selecting a spreadsheet and worksheet. At the top, it says "Trigger" and "1. New or Updated Spreadsheet Row in Google Sheets". Below this, there are three sections: "App & event" with a green checkmark, "Account" with a green checkmark, and "Trigger" with a dropdown arrow. The "Trigger" section is expanded, showing a dropdown menu with "Conference Attendees" selected. Below this, there is a "Worksheet" dropdown menu with "Attendees to import" selected. A note below the dropdowns says: "If you want to use this trigger with a Sheet that resides in your Google Team Drive, you have to workaround the issue using these steps." Below the dropdowns, there is a "Trigger Column" dropdown menu with "any_column" selected. A note below the dropdowns says: "You must have column headers" and "Trigger on changes to cells in this column only. Leave this field blank if you want the Zap to trigger on changes to any... more". At the bottom, there are two buttons: "Refresh fields" and "Continue".

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.

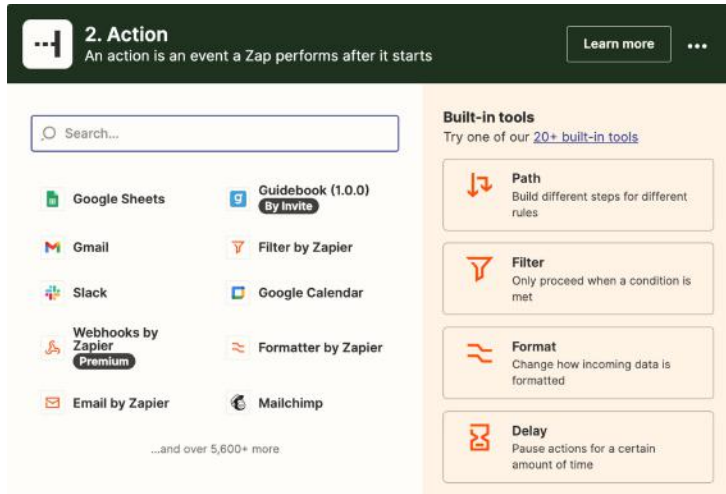


The test will pull a test record based on the choices you made in previous steps.

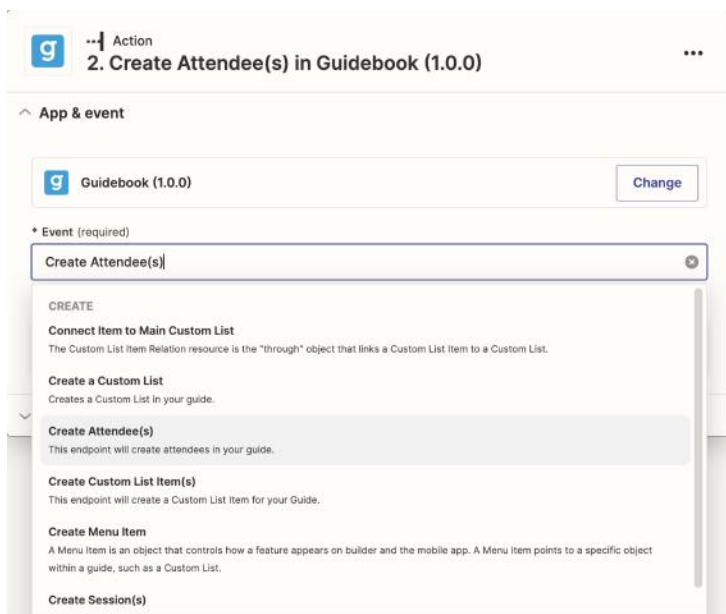


You're done with the Trigger!

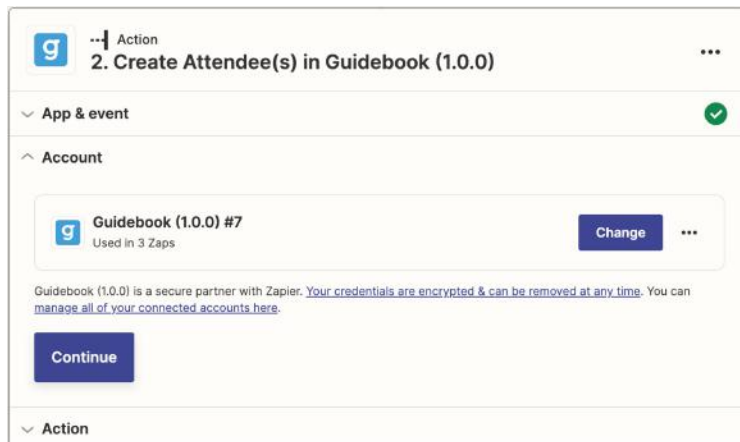
You will now set up the Action you'd like to accomplish.



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.

The screenshot shows the configuration for the second action in a Zap. The action is titled "2. Create Attendee(s) in Guidebook (1.0.0)". It is connected to the "App & event" and "Account" sections, both of which are checked with green checkmarks. The "Action" section is expanded, showing several required fields:

- Guide ID** (required): A text field containing "1. guide: 197127". Below it, a note states: "The specific guide your Attendee belongs to."
- Email** (required): A text field containing "1. email: Davidsp@mail.com". Below it, a note states: "Email address of the Attendee. We will search existing Guidebook users and attempt to associate with an existing account."
- First Name**: A text field containing "1. first_name: David". Below it, a note states: "First name of the Attendee. Only used if no existing Guidebook Account was found via email matching. Otherwise, thi... more"
- Last Name**: A text field containing "1. last_name: Patel". Below it, a note states: "Last name of the Attendee. Only used if no existing Guidebook Account was found via email matching. Otherwise, thi... more"
- Import ID**: A text field containing "null". Below it, a note states: "A string field you can use to input your own identifier. This is for when you have your own IDs for Attendees in your da... more"

At the bottom of the configuration, there are two buttons: "Refresh fields" and "Continue". Below the configuration, there is a "Test" section with a green checkmark.

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.

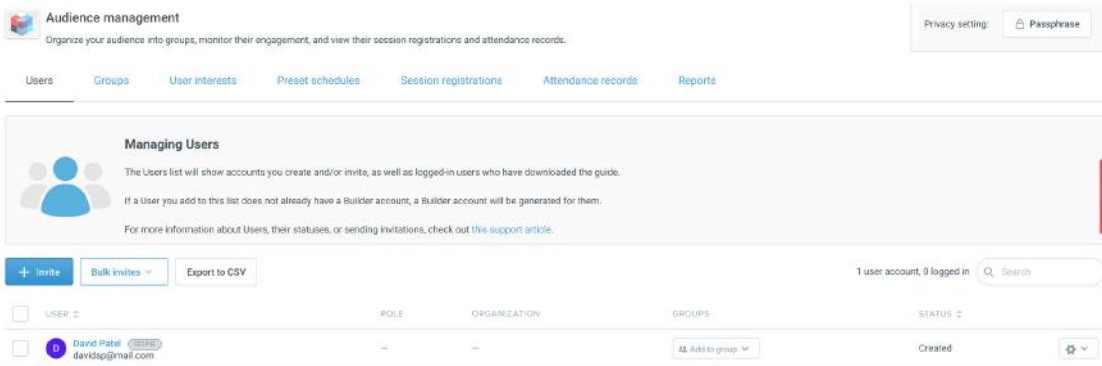
The screenshot shows the test results for the action "Send Attendee to Guidebook (1.0.0)". The action is checked with a green checkmark. Below the action, there is a message: "A Attendee was sent to Guidebook (1.0.0) about 3 minutes ago". A search bar is present with the text "Search Item data...". Below the search bar, the following data is displayed:

```

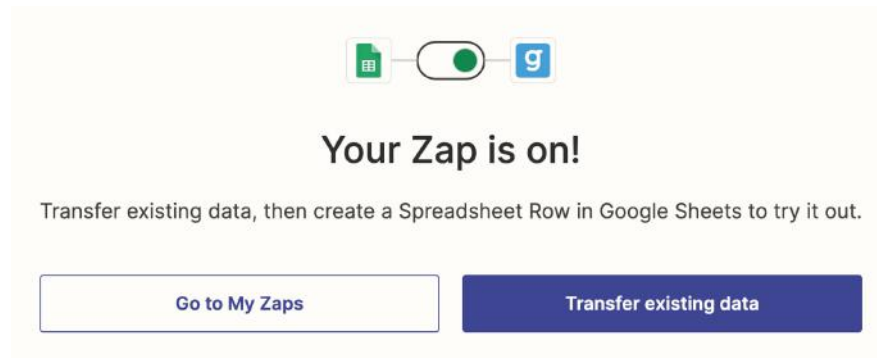
id: 8310771
guide_id: 197127
account_id: 8751264
import_id: null
first_name: David
last_name: Patel
email: davidsp@mail.com
avatar: null
cover: null
app_profile:
position:
company:
contact_email:
website:
revoked: false
status: 0
    
```

At the bottom of the test results, there are two buttons: "Retest action" and "Publish". A "Close" button is located at the very bottom of the window.

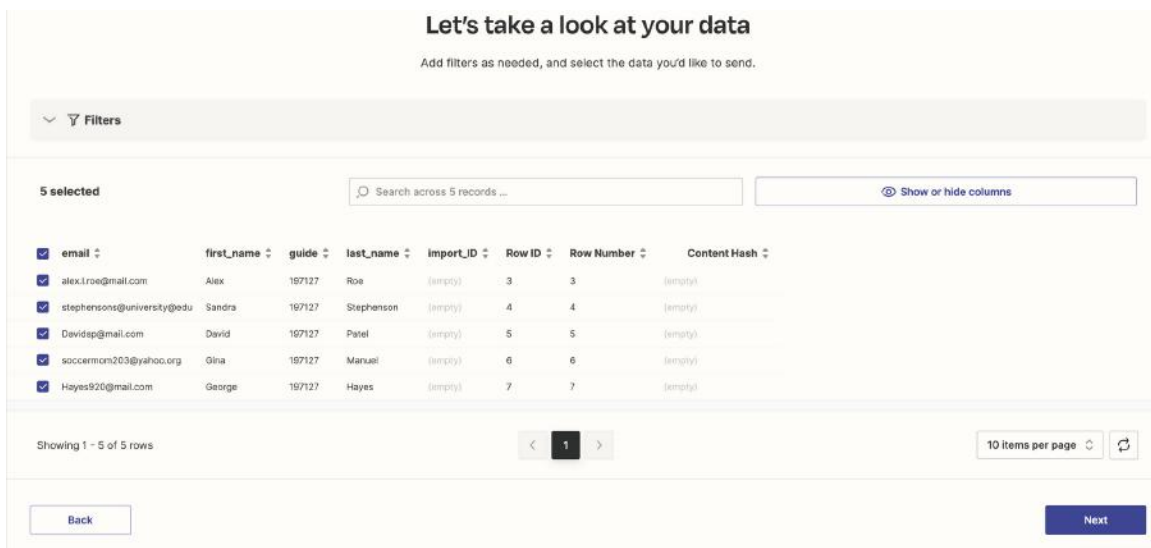
You can verify the test sent by checking the Audience Management section of the designated guide in Builder.



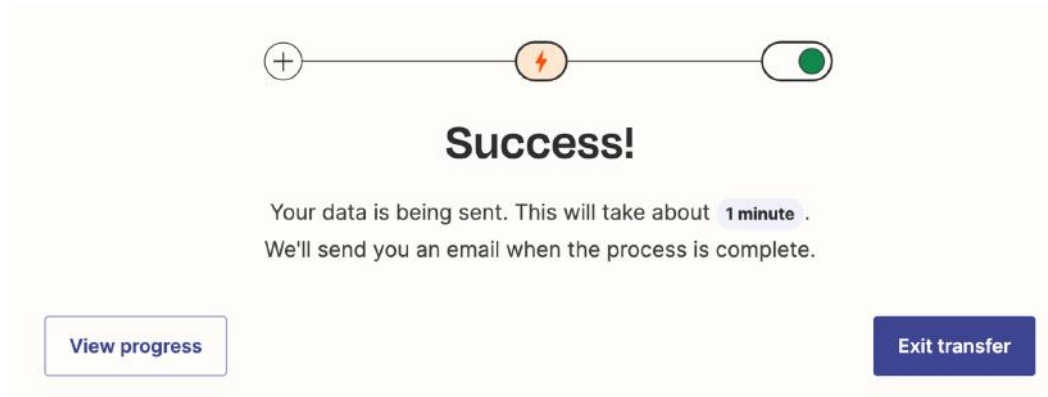
You will then **Publish your Zap!** If you already had data in your Google Sheet prior to setting this up, you should select “Transfer existing data”. Every new record added after set up to the Google Sheet will ‘zap’ through on its own.



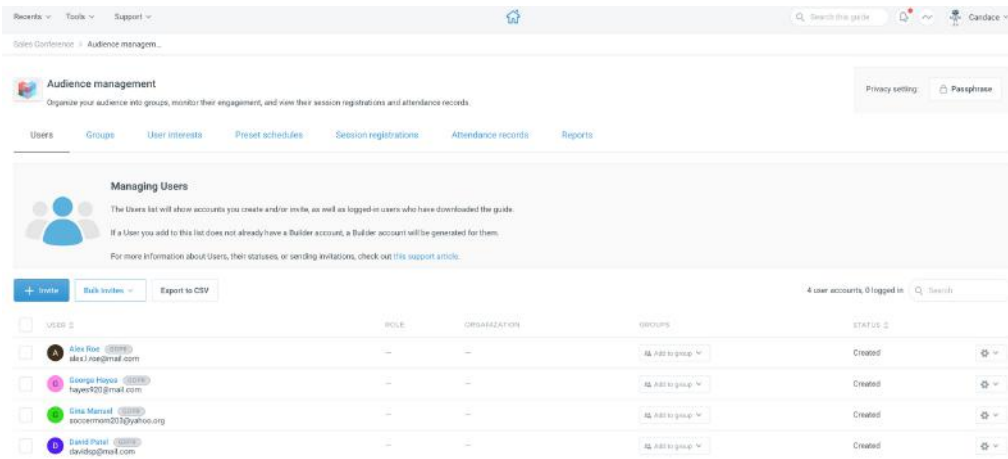
After selecting “Transfer existing data”, you will see all the imported existing data. You can “Select All” and click “Next” at the bottom right of your screen.



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!



Note: The Sandra Stephenson user did not import because I accidentally had a typo in their email as *stephensons@university@edu*. You can see zap failures in detail in Zapier.

Adding Attendees after Zap is Active

Now that your Zap is live and active, you can add additional rows of information to your source Google Sheet and the action will complete on its own!

For the purposes of this example, I will re-add Sandra Stephenson in row 7 and make sure to put in their valid email address *stephensons@university.edu*

Conference Attendees

	A	B	C	D
1	guide	email	first_name	last_name
2	197127	alex.l.roe@mail.com	Alex	Roe
3	197127	stephensons@university@edu	Sandra	Stephenson
4	197127	Davidsp@mail.com	David	Patel
5	197127	soccermom203@yahoo.org	Gina	Manuel
6	197127	Hayes920@mail.com	George	Hayes
7	197127	stephensons@university.edu	Sandra	Stephenson
8				

Audience management

Managing Users

ID	EMAIL	ORGANIZATION	STATUS
197127	alex.l.roe@mail.com		Created
197127	stephensons@university@edu		Created
197127	Davidsp@mail.com		Created
197127	soccermom203@yahoo.org		Created
197127	Hayes920@mail.com		Created
197127	stephensons@university.edu		Created

Added another attendee, Judith Smith

Conference Attendees

	A	B	C	D
1	guide	email	first_name	last_name
2	197127	alex.l.roe@mail.com	Alex	Roe
3	197127	stephensons@university@edu	Sandra	Stephenson
4	197127	Davidsp@mail.com	David	Patel
5	197127	soccermom203@yahoo.org	Gina	Manuel
6	197127	Hayes920@mail.com	George	Hayes
7	197127	stephensons@university.edu	Sandra	Stephenson
8	197127	judithiscool@email.com	Judith	Smith
9				

Audience management

Managing Users

ID	EMAIL	ORGANIZATION	STATUS
197127	alex.l.roe@mail.com		Created
197127	stephensons@university@edu		Created
197127	Davidsp@mail.com		Created
197127	soccermom203@yahoo.org		Created
197127	Hayes920@mail.com		Created
197127	stephensons@university.edu		Created
197127	judithiscool@email.com		Created

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.

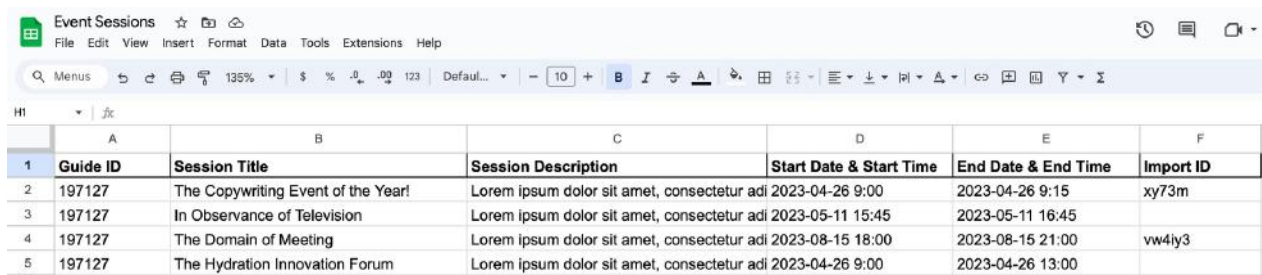
Required Information: guide ID, session title, session description, session start date & time, session end date & time

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

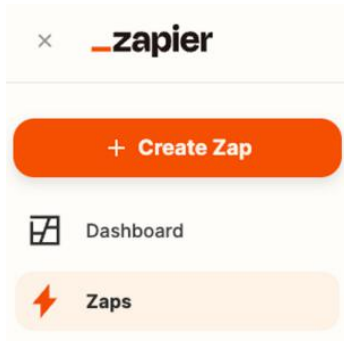


	A	B	C	D	E	F
1	Guide ID	Session Title	Session Description	Start Date & Start Time	End Date & End Time	Import ID
2	197127	The Copywriting Event of the Year!	Lorem ipsum dolor sit amet, consectetur adi	2023-04-26 9:00	2023-04-26 9:15	xy73m
3	197127	In Observance of Television	Lorem ipsum dolor sit amet, consectetur adi	2023-05-11 15:45	2023-05-11 16:45	
4	197127	The Domain of Meeting	Lorem ipsum dolor sit amet, consectetur adi	2023-08-15 18:00	2023-08-15 21:00	vw4iy3
5	197127	The Hydration Innovation Forum	Lorem ipsum dolor sit amet, consectetur adi	2023-04-26 9:00	2023-04-26 13:00	

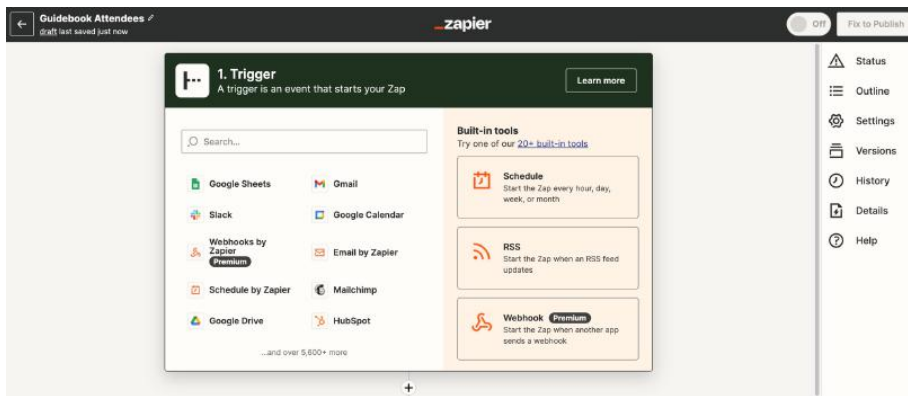
A sheet can have any other information in it. Later in the process you will decide which columns map to what fields in Builder. Column names do not need to be specific.

Setting Up the Zap

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

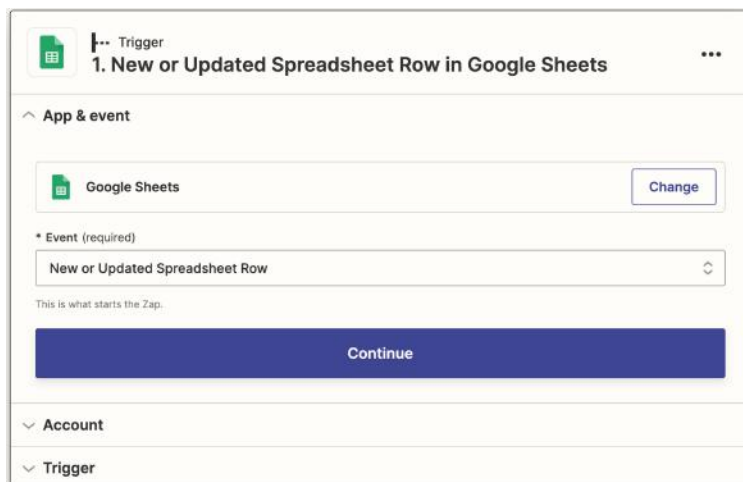


You will title your Zap and set up your initial Trigger.

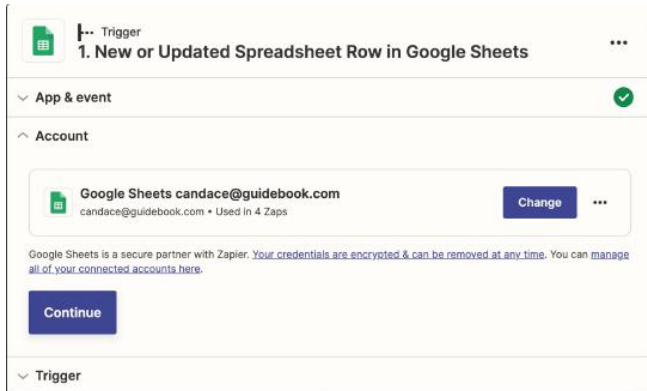


Select Google Sheets. You will need to select a Google Sheets Event to be associated with the Trigger.

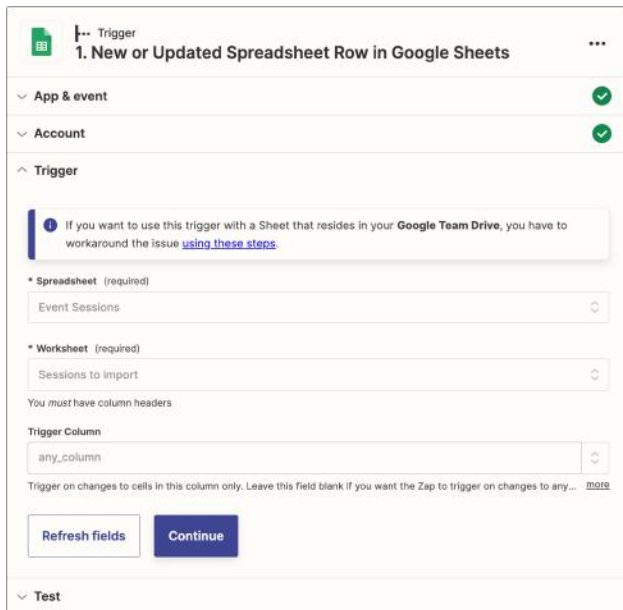
[Zapier Support Article: [How to set up your Google spreadsheet to work with Zapier](#)]



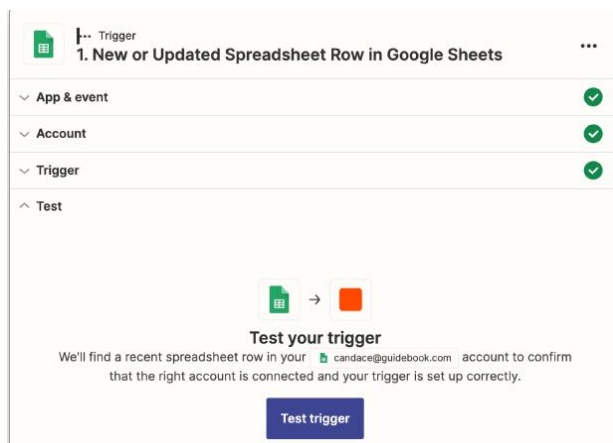
Go through the flow to connect the necessary Google Sheets account. This account should have access to the source Google Sheet.



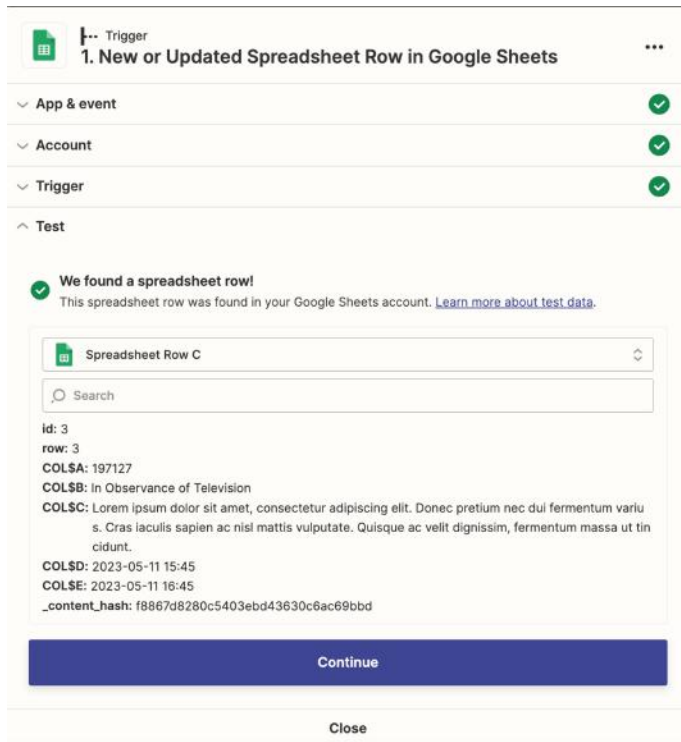
Select the specific Spreadsheet and Worksheet that the Zap will be getting information from.



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

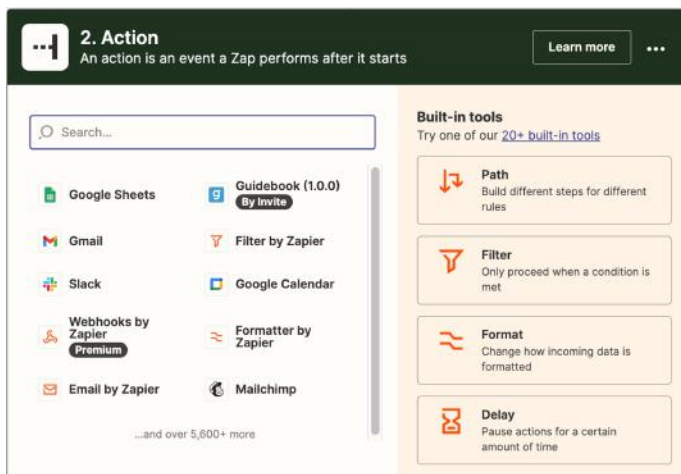


The test will pull a test record based on the choices you made in previous steps.

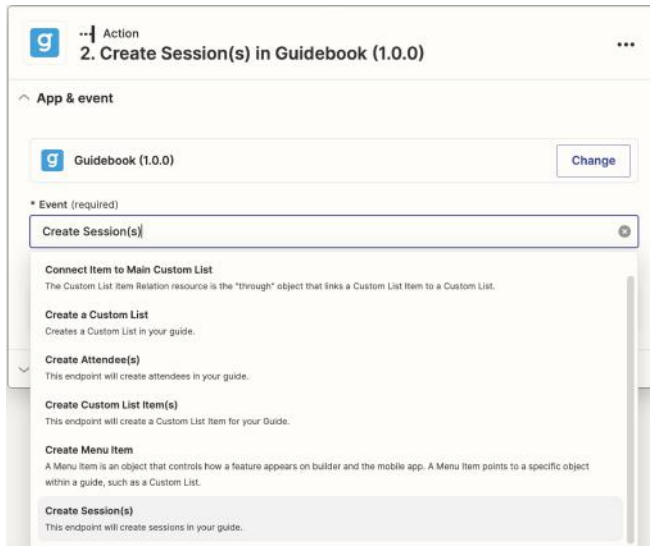


You're done with the Trigger!

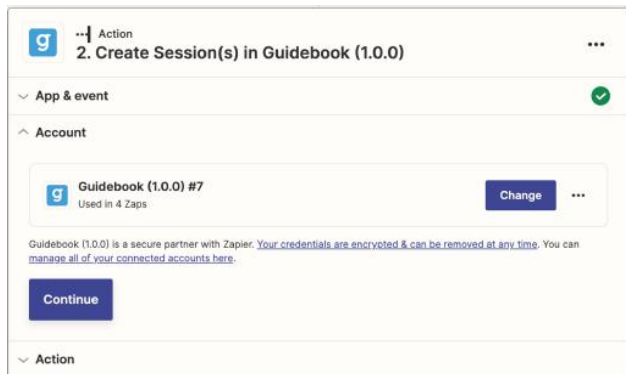
You will now set up the Action you'd like to accomplish.



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 for the Action.

2. Create Session(s) in Guidebook (1.0.0)

- App & event:
- Account:
- Action:
 - Guide ID 1.2.3 (required):
 - Session Title (required):
 - Session Description (required):
 - Start Date & Start Time (required):
 - End Date & End Time (required):
 - All Day Session?:
 - Import ID:

A text description of the Session. This field has a 20,000 character limit. This field supports basic HTML.

* Start Date & Start Time (required):

The start time of the event. Format needed: YYYY-MM-DDThh:mm. For consistency, all timestamps are converted to...

* End Date & End Time (required):

The end time of the event. Format needed: YYYY-MM-DDThh:mm. For consistency, all timestamps are converted to...

All Day Session?

A boolean value indicating if a session runs for the entire day.

Import ID:

A string field you can use to input your own identifier. This is for when you have your own IDs for Sessions in your data store.

Require Login?

A boolean value indicating if a user needs to be logged in to add this session to their schedule. Setting this field...

Add to Schedule

A boolean value indicating if end-users can add this session to their personal schedule.

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 Session(s) in Guidebook (1.0.0)

- App & event:
- Account:
- Action:
- Test:
 - Send Session to Guidebook (1.0.0)
 - We'll use this as a sample for setting up the rest of your Zap.
 - A Session was sent to Guidebook (1.0.0) about 37 seconds ago
 - Search item data...
 - id: 28903053
 - created_at: 2023-05-10T22:14:02.839128+0000
 - start_time: 2023-05-11T22:45:00.000000+0000
 - end_time: 2023-05-11T23:45:00.000000+0000
 - all_day: false
 - name: In Observance of Television
 - description_html: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec pretium nec du... rmentum varius. Cras iaculis sapien ac nisi mattis vulputate. Quisque ac velit digni... ssm, fermentum massa ut tincidunt.
 - import_id:
 - allow_rating: true
 - add_to_schedule: true
 - guide: 197127
 - schedule_tracks:
 - image: null
 - locations:

Close



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

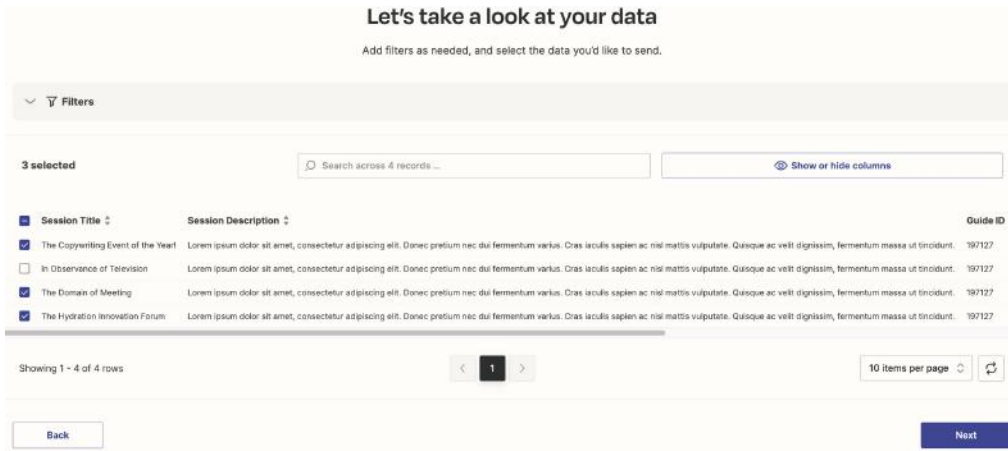


Your Zap is on!

Transfer existing data, then create a Spreadsheet Row in Google Sheets to try it out.



After selecting “Transfer existing data”, you will see all the imported existing data. You can “Select All” and click “Next” at the bottom right of your screen.



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

You're about to send 3 records from Google Sheets to Guidebook (1.0.0)

Are you ready for this?

SOURCE Google Sheets **DESTINATION** Guidebook (1.0.0)

← Back Send data

Success!

Your data is being sent. This will take about **1 minute**. We'll send you an email when the process is complete.

View progress Exit transfer

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

SESSION NAME	DATE & TIME (PDT)	LOCATION	TRACKS
<input type="checkbox"/> The Copywriting Event of the Year!	Apr 26th 2023 9:00 am - 9:15 am	-	-
<input type="checkbox"/> The Hydration Innovation Forum	Apr 26th 2023 9:00 am - 1:00 pm	-	-
<input type="checkbox"/> In Observance of Television	May 11th 2023 3:45 pm - 4:45 pm	-	-
<input type="checkbox"/> The Domain of Meeting	Aug 15th 2023 6:00 pm - 9:00 pm	-	-

Adding Sessions after Zap is Active

Now that your Zap is live and active, you can add additional rows of information to your source Google Sheet and the action will complete on its own!

I added two new sessions via the Google Sheet

Guide ID	Session Title	Session Description	Start Date & Start Time	End Date & End Time	Import ID
197127	The Copywriting Event of the Year!	Lorem ipsum dolor sit amet, consectetur adi	2023-04-26 9:00	2023-04-26 9:15	xy73m
197127	In Observance of Television	Lorem ipsum dolor sit amet, consectetur adi	2023-05-11 15:45	2023-05-11 16:45	
197127	The Domain of Meeting	Lorem ipsum dolor sit amet, consectetur adi	2023-08-15 18:00	2023-08-15 21:00	vw4iy3
197127	The Hydration Innovation Forum	Lorem ipsum dolor sit amet, consectetur adi	2023-04-26 9:00	2023-04-26 13:00	
197127	Closing Reception	This is required for all attendees	2023-05-10 7:00	2023-05-10 9:00	
197127	Final Goodbyes	This is not required for all attendees	2023-05-11 10:00	2023-05-11 12:15	

I refreshed Builder and saw the two new sessions without ever having to open Zapier again!

SESSION NAME	DATE & TIME (PDT)	LOCATION	TRACKS
<input type="checkbox"/> The Copywriting Event of the Year!	Apr 26th 2023 9:00 am - 9:15 am	-	-
<input type="checkbox"/> The Hydration Innovation Forum	Apr 26th 2023 9:00 am - 1:00 pm	-	-
<input checked="" type="checkbox"/> Closing Reception	May 10th 2023 7:00 am - 9:00 am	-	-
<input checked="" type="checkbox"/> Final Goodbyes	May 11th 2023 10:00 am - 12:15 pm	-	-
<input type="checkbox"/> In Observance of Television	May 11th 2023 3:45 pm - 4:45 pm	-	-
<input type="checkbox"/> The Domain of Meeting	Aug 19th 2023 6:00 pm - 9:00 pm	-	-

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

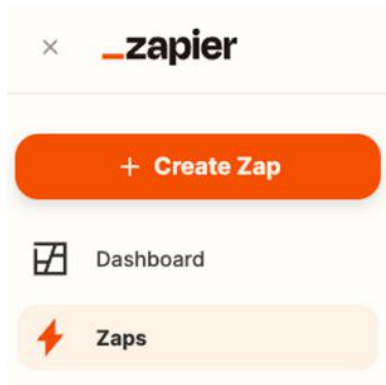
Here is an example of a sheet

	A	B
1	Guide ID	Custom List Title
2	197127	Speakers
3		

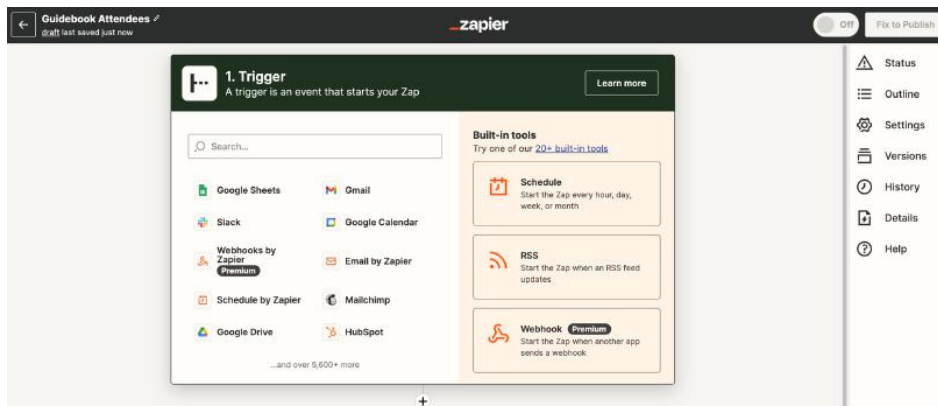
A sheet can have any other information in it. Later in the process you will decide which columns map to what fields in Builder. Column names do not need to be specific.

Setting Up the Zap

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

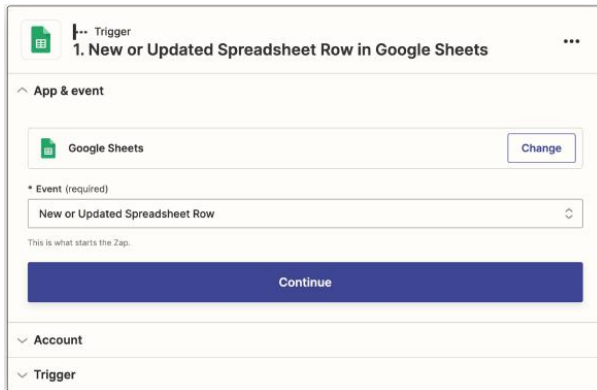


You will title your Zap and set up your initial Trigger.

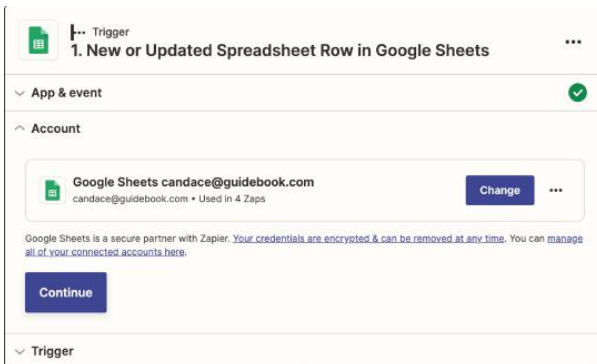


Select Google Sheets. You will need to select a Google Sheets Event to be associated with the Trigger.

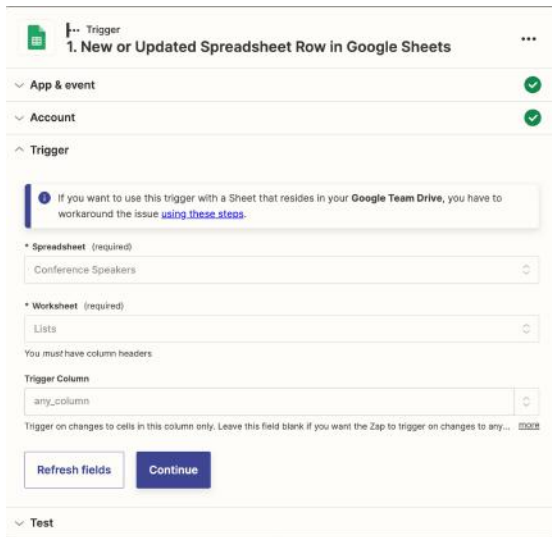
[Zapier Support Article: [How to set up your Google spreadsheet to work with Zapier](#)]



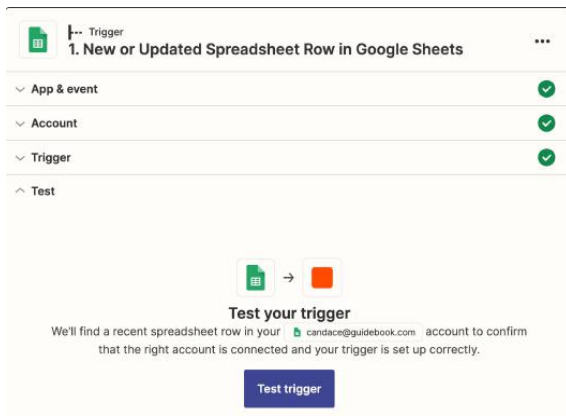
Go through the flow to connect the necessary Google Sheets account. This account should have access to the source Google Sheet.



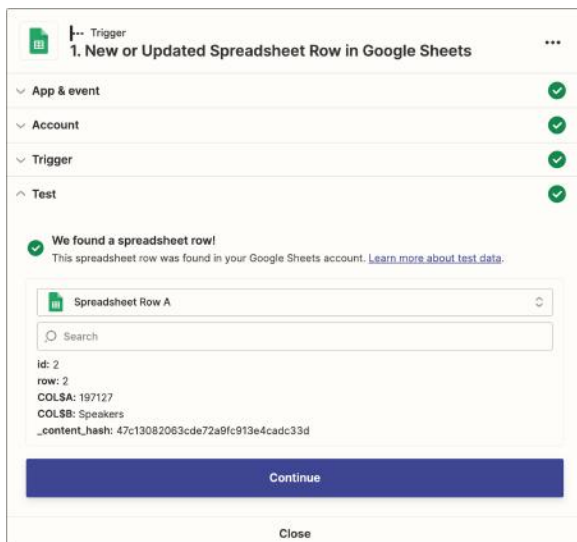
Select the specific Spreadsheet and Worksheet that the Zap will be getting information from.



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.

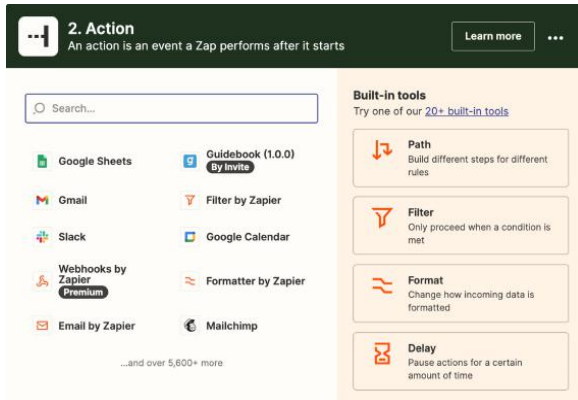


The test will pull a test record based on the choices you made in previous steps.

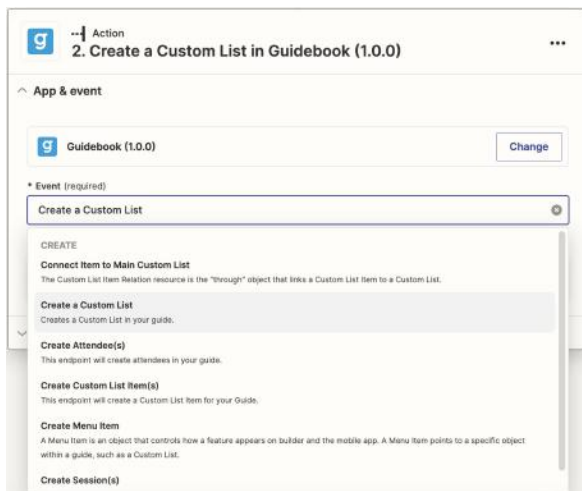


You're done with the Trigger!

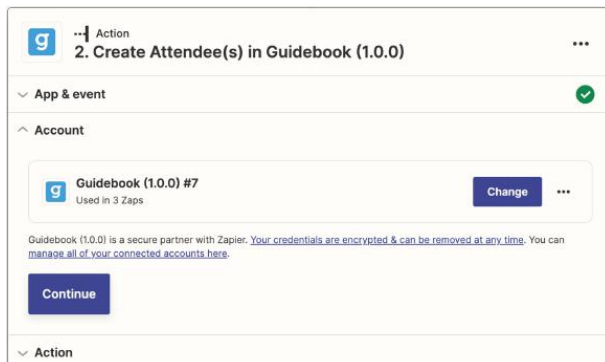
You will now set up the Action you'd like to accomplish.



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. 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 a Custom List in Guidebook (1.0.0)

- App & event ✓
- Account ✓
- Action
 - Guide ID** 1 2 3 (required)
1. Guide ID: 197127
The specific guide your Custom List belongs to.
 - Custom List Title** (required)
1. Custom List Title: Speakers
The title of your Custom List. I.e (Exhibitors, Speakers, Places to Visit, etc).
 - Import ID**
Enter text or insert data...
A string field you can use to input your own identifier. This is for when you have your own IDs for your Lists in your dat...

Buttons: Refresh fields, Continue

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.

Send Custom List to Guidebook (1.0.0)
We'll use this as a sample for setting up the rest of your Zap.

A Custom List was sent to Guidebook (1.0.0) about 6 seconds ago

Search item data...

```

id: 1060542
import_id:
guide: 197127
name: Speakers
disable_todo: false
allow_rating: true
created_at: 2023-05-12T18:01:21.671450+0000
    
```

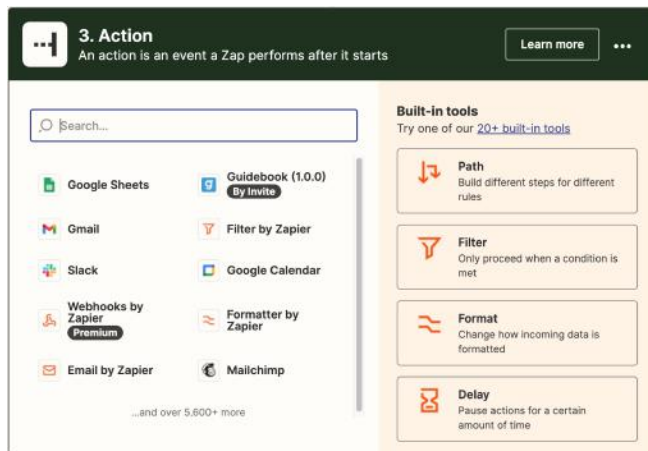
Buttons: Retest action, Publish

Close

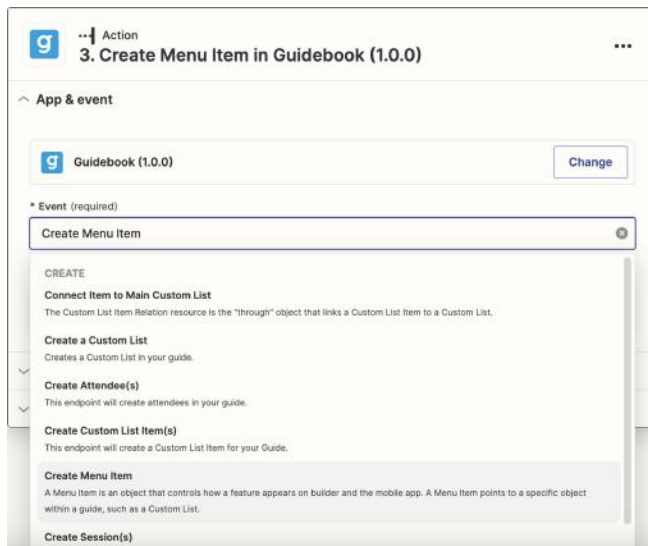
You can close this action.

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.

g Action
3. Create Menu Item in Guidebook (1.0.0)

App & event ✓

Account ✓

^ Action

* Guide ID 1 2 3 (required)
2. Guide ID: 197127
The specific guide your Menu Item belongs to.

* Content Type (required)
custom_list.customlist
The content type of the object you want a Menu Item for.

* Object ID 1 2 3 (required)
2. Custom List ID: 1060542
The id number of the object you want a Menu item for.

Refresh fields Continue

Test

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

g Action
3. Create Menu Item in Guidebook (1.0.0)

App & event ✓

Account ✓

Action ✓

^ Test

Send Menu item to Guidebook (1.0.0)
We'll use this as a sample for setting up the rest of your Zap.

A Menu item was sent to Guidebook (1.0.0) about 6 seconds ago

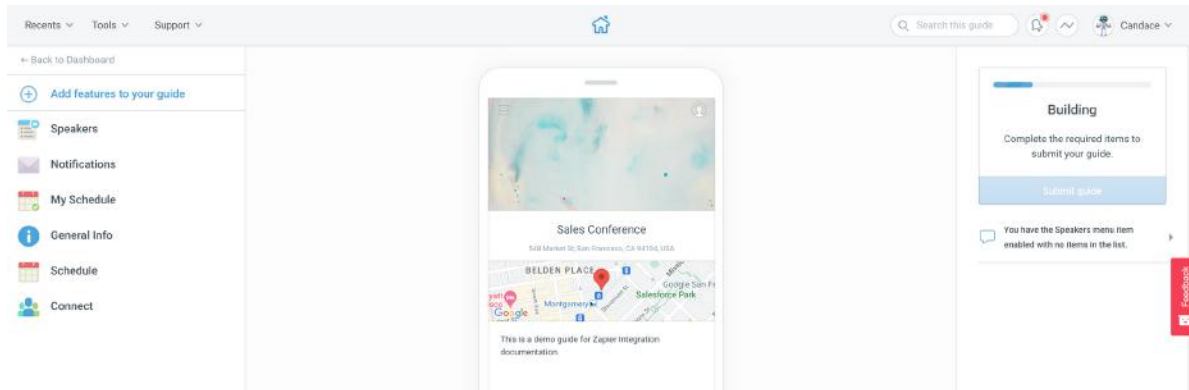
Search Item data...

guide: 197127
content_type: custom_list.customlist
enabled: true
object_id: 1060542
folder: null
id: 3802400
created_at: 2023-05-12T18:14:32.235655Z

Retest action Publish

Close

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!** If you already had data in your Google Sheet prior to setting this up, you should select “Transfer existing data”. Every new record added after set up to the Google Sheet will ‘zap’ through on its own.

In this example, I only had one record in the source sheet, so I am not transferring existing data.

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

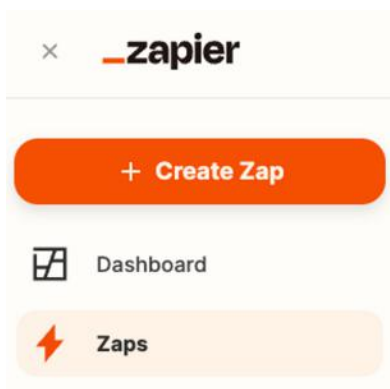
	A	B	C	D	E	F	G
1	Guide ID	List ID	Speaker	Subtitle	Description	Import ID	Contact Email
2	197127	1064120	Whitney Houston	Singer	Whitney Elizabeth Houston was an Ame wh123		houstonw@mail.com
3	197127	1064120	Ryan Reynolds	Actor	Ryan Rodney Reynolds is a Canadian-A		
4	197127	1064120	Tom Hanks	Actor	Thomas Jeffrey Hanks is an American a th456		
5	197127	1064120	Oprah Winfrey	Host	Oprah Gail Winfrey is an American talk show789		oprah@winfrey.com
6	197127	1064120	Kristen Bell	Actress	Kristen Anne Bell is an American actres		

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

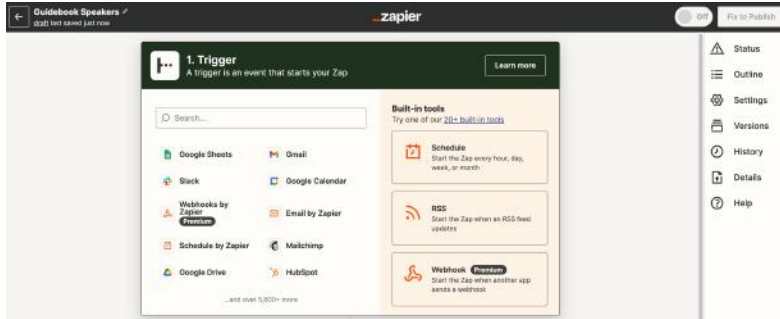
A sheet can have any other information in it. Later in the process you will decide which columns map to what fields in Builder. Column names do not need to be specific.

Setting Up the Zap

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

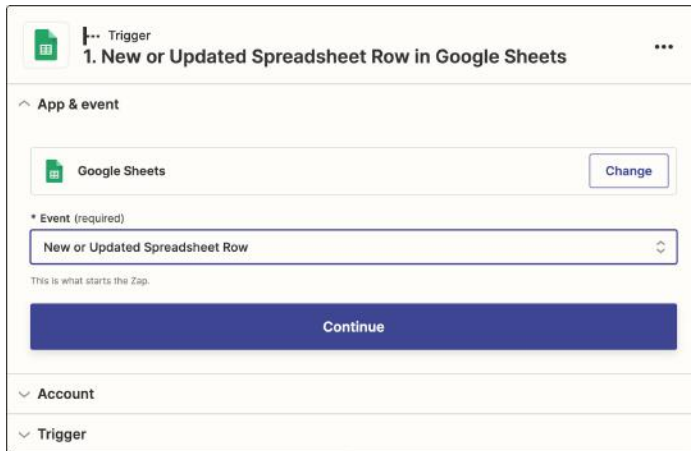


You will title your Zap and set up your initial Trigger.

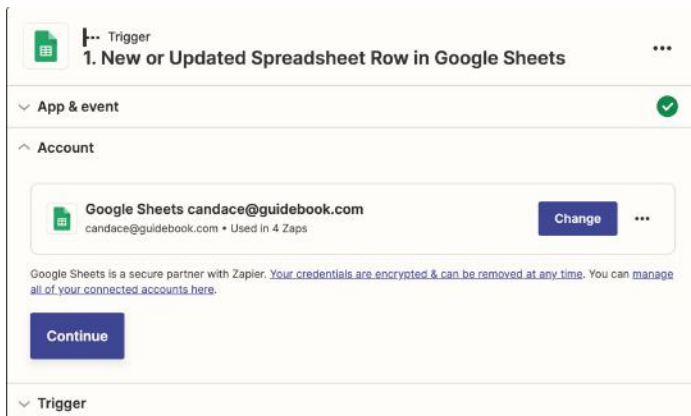


Select Google Sheets. You will need to select a Google Sheets Event to be associated with the Trigger.

[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 that the Zap will be getting information from.

1. New or Updated Spreadsheet Row in Google Sheets

- App & event ✓
- Account ✓
- Trigger
 - Spreadsheet (required)**
Conference Speakers
 - Worksheet (required)**
Speakers
 - You *must* have column headers
 - Trigger Column**
any_column
 - Trigger on changes to cells in this column only. Leave this field blank if you want the Zap to trigger on changes to any... [more](#)

Buttons: Refresh fields, Continue

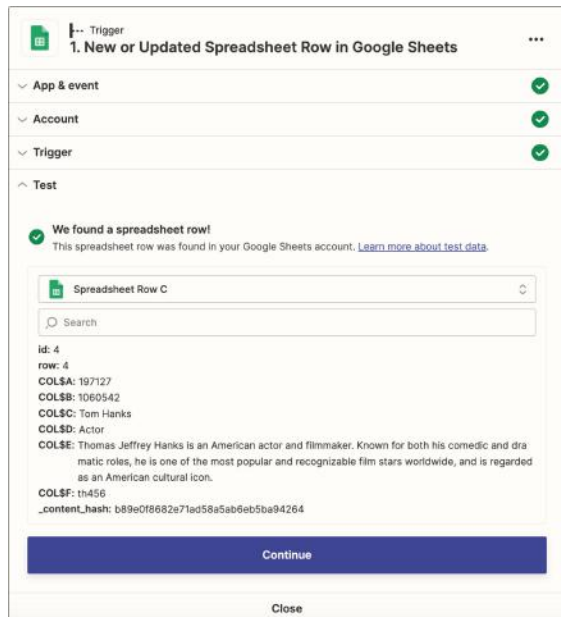
Zapier has built in test processes throughout. This helps ensure any issues are caught proactively. Click the button to test the Trigger.

Test your trigger

We'll find a recent spreadsheet row in your candace@guidebook.com account to confirm that the right account is connected and your trigger is set up correctly.

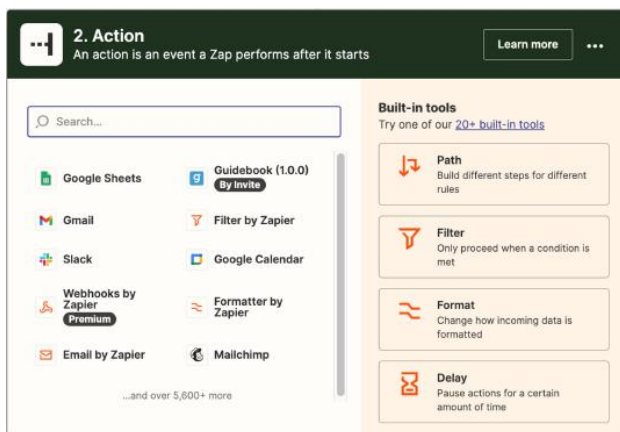
Test trigger

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

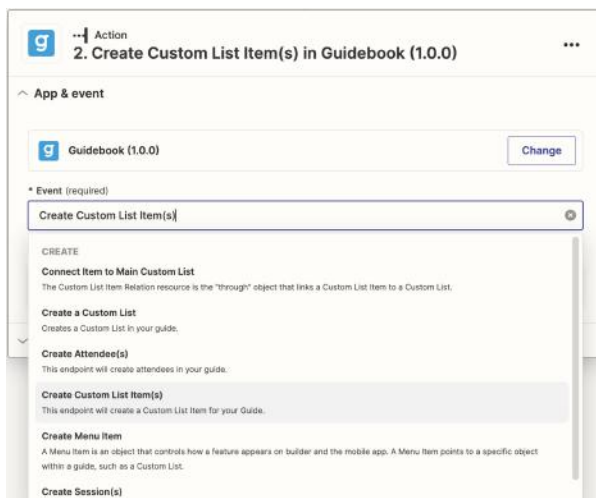


You're done with the Trigger!

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 Custom List Item(s).



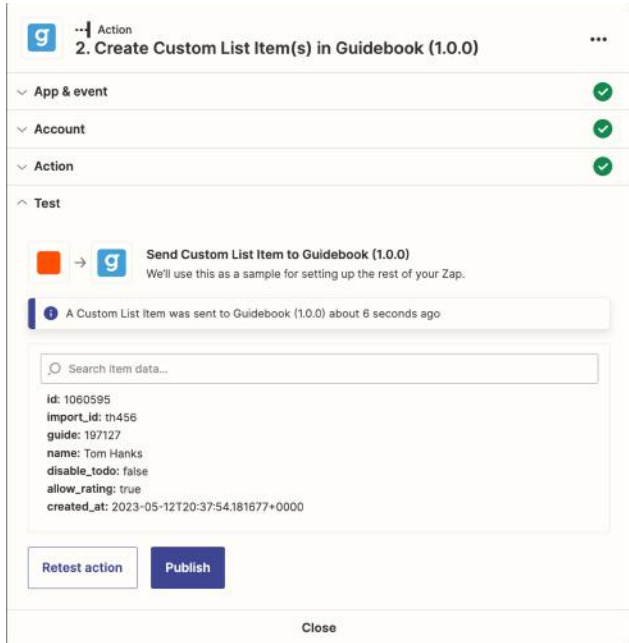
Go through the flow to connect the necessary Guidebook account. You will need to have your [API Key](#).

The screenshot shows the Zapier configuration page for the action "2. Create Session(s) in Guidebook (1.0.0)". The "App & event" section is expanded and shows a green checkmark. Under the "Account" section, a dropdown menu is open, displaying "Guidebook (1.0.0) #7" with a "Change" button and a three-dot menu. Below the dropdown, there is a "Continue" button. The "Action" section is collapsed.

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

The screenshot shows the Zapier configuration page for the action "2. Create Custom List Item(s) in Guidebook (1.0.0)". The "App & event" and "Account" sections are both expanded and show green checkmarks. The "Action" section is expanded, showing several required fields with their values: "1. Guide ID: 197127", "1. Speaker: Tom Hanks", "1. Subtitle: Actor", "1. Description: Thomas Jeffrey...cultural icon.", "1. Import ID: th456", and "1. Contact Email: No data". Each field has a small description below it. At the bottom of the "Action" section, there are "Refresh fields" and "Continue" buttons. The "Test" section is collapsed.

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.



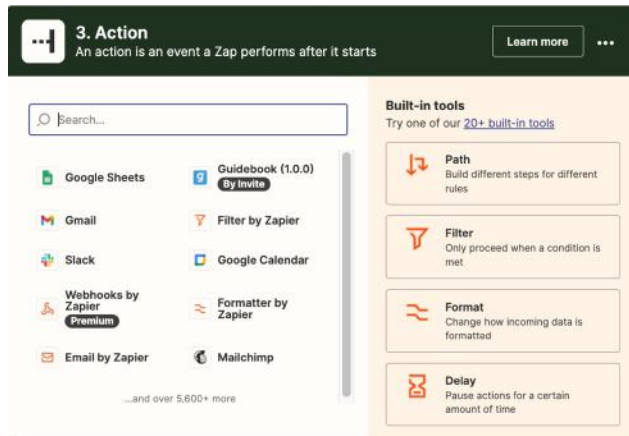
You won't see it in Builder just yet!

You can close this action.

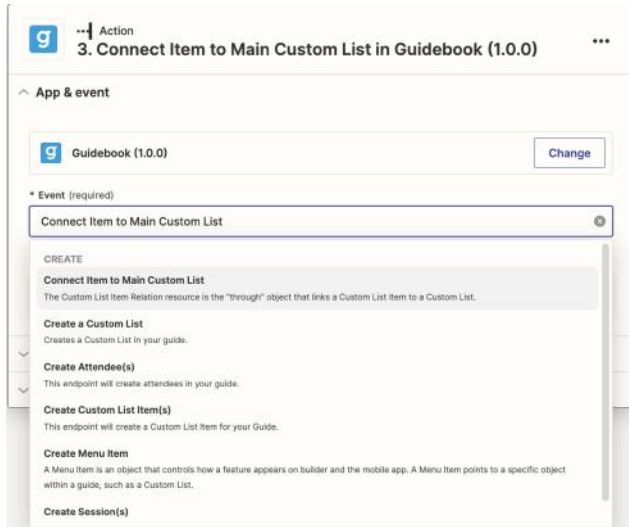
Connect Items to Main Custom List

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

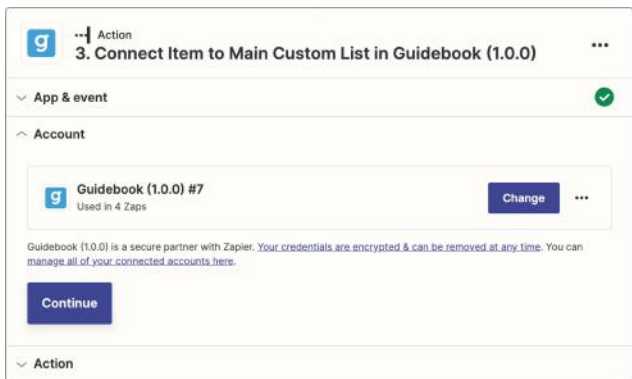
You will click the plus to add another action.



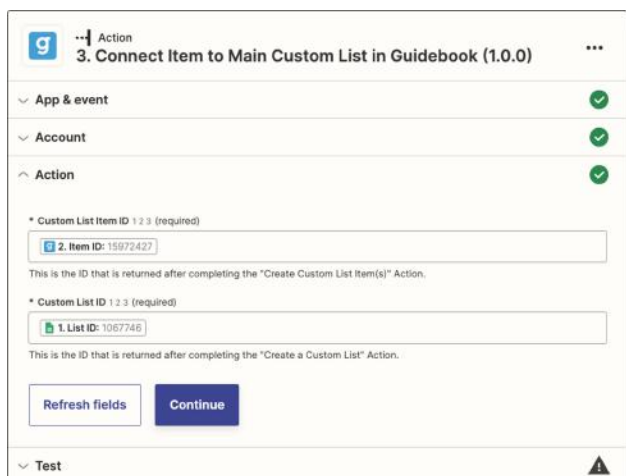
Select the Guidebook app (within Zapier). Select Action Event - Connect Item to Main Custom List.



Go through the flow to connect the necessary Guidebook account.



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



After selecting “Transfer existing data”, you will see all the imported existing data. You can “Select All” and click “Next” at the bottom right of your screen.

4 selected

List ID	Speaker	Subtitle	Guide ID	Description
<input checked="" type="checkbox"/> 1067746	Whitney Houston	Singer	197127	Whitney Elizabeth Houston was an American singer and actress. Nicknamed “the Voice”, she is one of the bestselling music artists of all time, with over 200 million records sold worldwide. In 2023, I
<input checked="" type="checkbox"/> 1067746	Ryan Reynolds	Actor	197127	Ryan Rodney Reynolds is a Canadian-American actor, film producer and businessman. He began his career starring in the Canadian teen soap opera <i>Hillside</i> , and had minor roles before landing the l
<input type="checkbox"/> 1067746	Tom Hanks	Actor	197127	Thomas Jeffrey Hanks is an American actor and filmmaker. Known for both his comedic and dramatic roles, he is one of the most popular and recognizable film stars worldwide, and is regarded as a
<input checked="" type="checkbox"/> 1067746	Oprah Winfrey	Host	197127	Oprah Gail Winfrey is an American talk show host, television producer, actress, author, and media proprietor. She is best known for her talk show, <i>The Oprah Winfrey Show</i> , broadcast from Chicago, I
<input checked="" type="checkbox"/> 1067746	Kristen Bell	Actress	197127	Kristen Anne Bell is an American actress. Beginning her acting career by starring in stage productions while attending the Tisch School of the Arts at New York University.


Showing 1 - 5 of 5 rows


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


 

You're about to send 4 records from Google Sheets to Guidebook (1.0.0)

Are you ready for this?

SOURCE:  Google Sheets

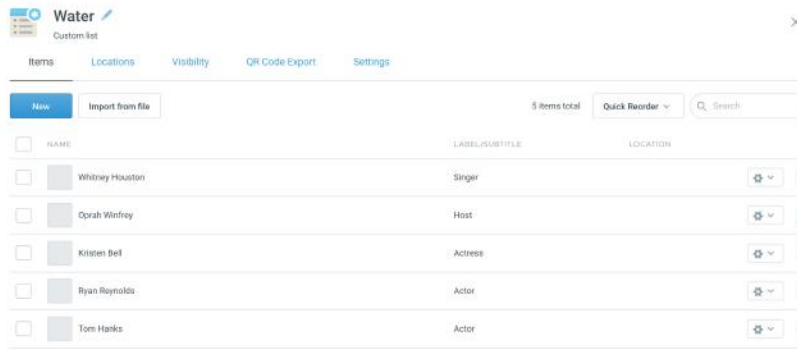
DESTINATION:  Guidebook (1.0.0)



Success!

Your data is being sent. This will take about **1 minute**. We'll send you an email when the process is complete.

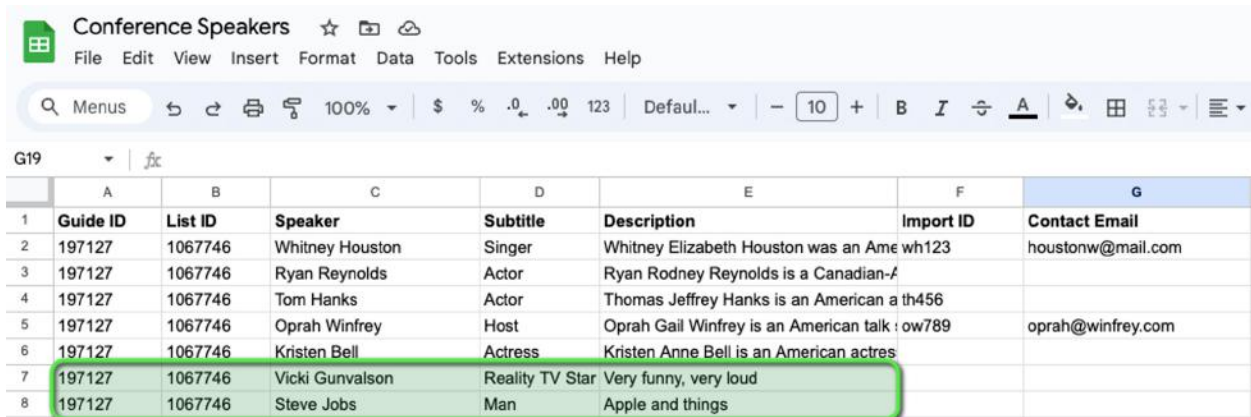
You can see in these that the data was successfully sent!



Adding List Items after Zap is Active

Now that your Zap is live and active, you can add additional rows of information to your source Google Sheet and the action will complete on its own!

I added two new list items via the Google Sheet



I refreshed Builder and saw the two new sessions without ever having to open Zapier again!

The screenshot shows a web interface for a 'Water' custom list. At the top, there are navigation tabs: 'Items', 'Locations', 'Visibility', 'QR Code Export', and 'Settings'. Below the tabs, there are buttons for 'New' and 'Import from file'. The main area displays a table with 7 items. The first two items, 'Steve Jobs' and 'Vicki Gunvalson', are highlighted with a green border. Each item row includes a checkbox, a name, a label/subtitle, a location, and a settings icon.

<input type="checkbox"/>	NAME	LABEL/SUBTITLE	LOCATION	
<input type="checkbox"/>	Steve Jobs	Man		⚙️
<input type="checkbox"/>	Vicki Gunvalson	Reality TV Star		⚙️
<input type="checkbox"/>	Whitney Houston	Singer		⚙️
<input type="checkbox"/>	Oprah Winfrey	Host		⚙️
<input type="checkbox"/>	Kristen Bell	Actress		⚙️
<input type="checkbox"/>	Ryan Reynolds	Actor		⚙️
<input type="checkbox"/>	Tom Hanks	Actor		⚙️