guidebook

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.
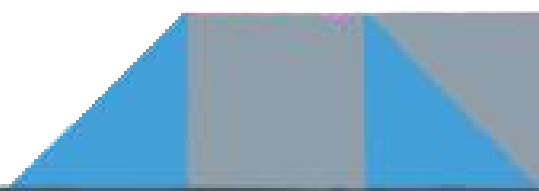
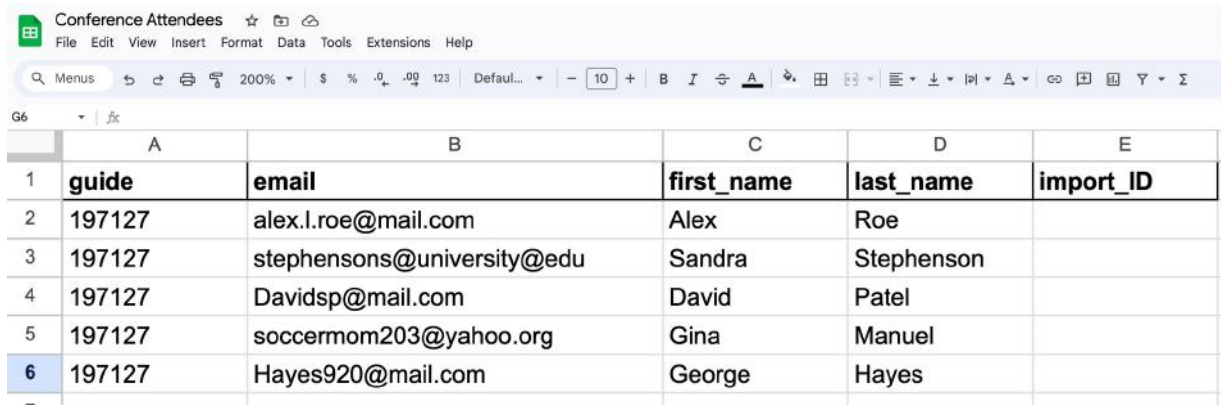# Table of Contents

Creating Attendee(s)

Google Sheet

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
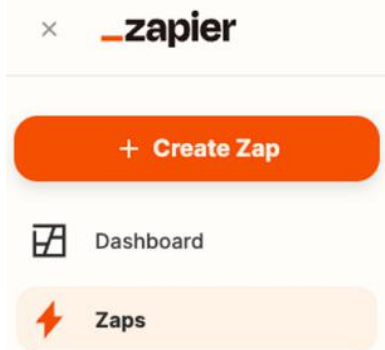
Here is an example of a sheet

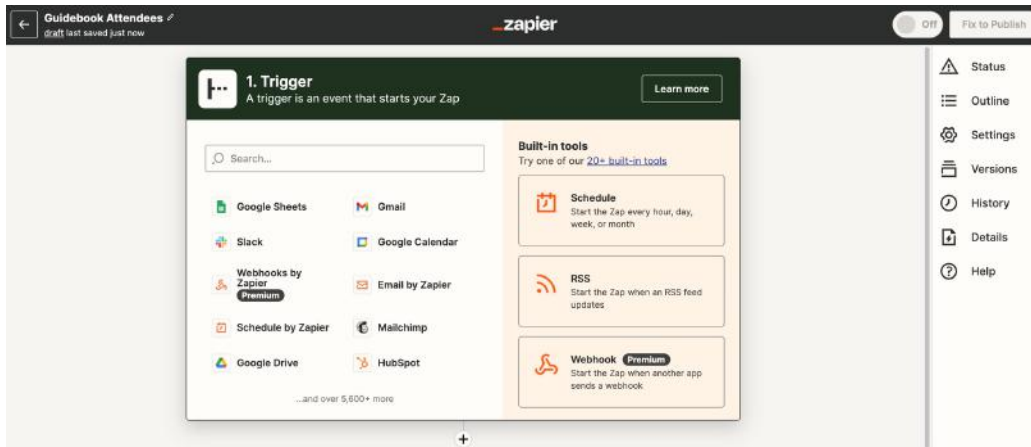|	A	B	C	D	E
	guide	email	first_name	last_name	import_ID
1	197127	alex.l.roe@mail.com	Alex	Roe	
2	197127	stephensons@university@edu	Sandra	Stephenson	
3	197127	Davidsp@mail.com	David	Patel	
4	197127	soccermom203@yahoo.org	Gina	Manuel	
5	197127	Hayes920@mail.com	George	Hayes	

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

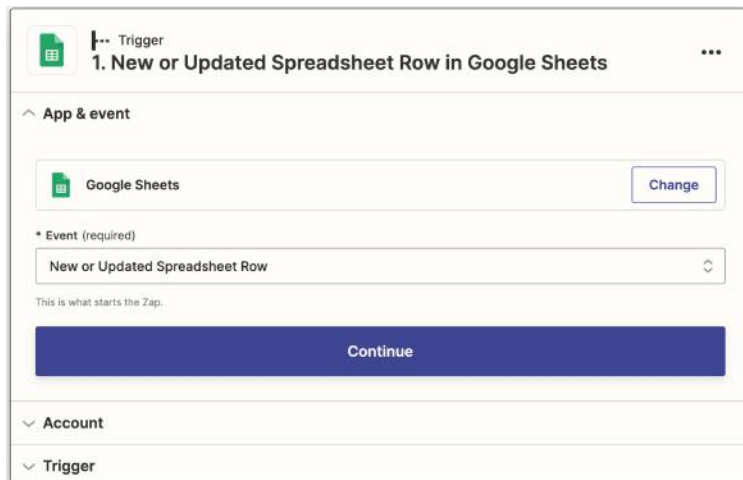Within Zapier, you will create a new Zap to get started.

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.

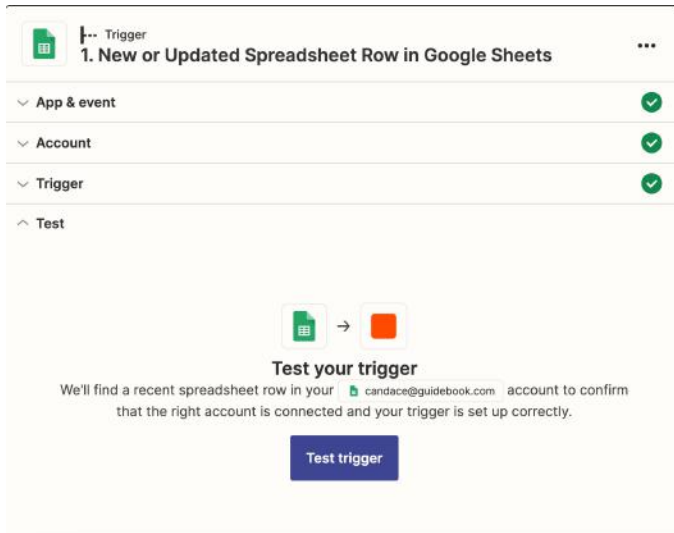[Zapier Support Article: **How to set up your Google spreadsheet to work with Zapier**]

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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.
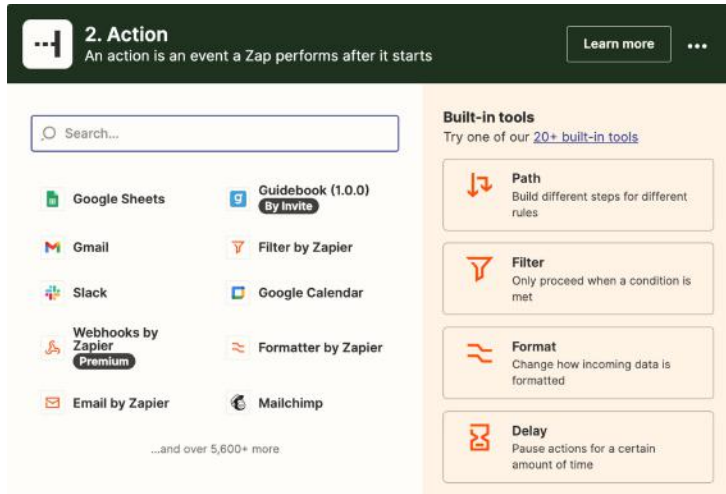

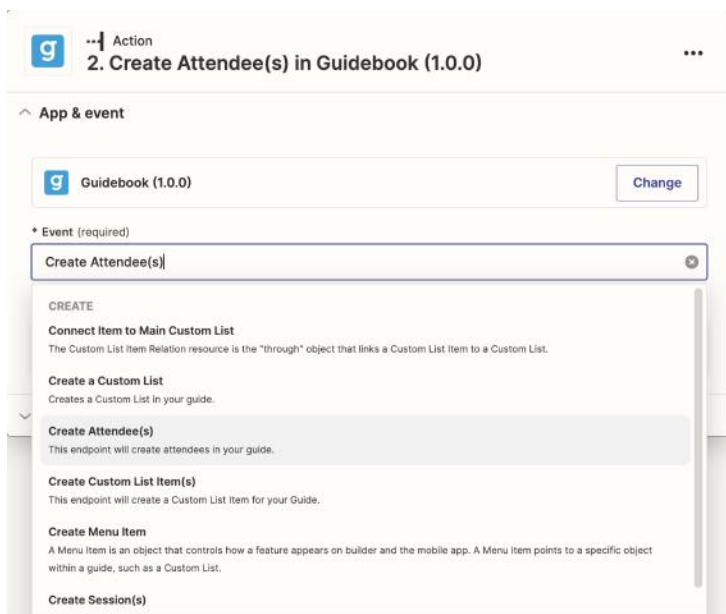The test will pull a test record based on the choices you made in previous steps.
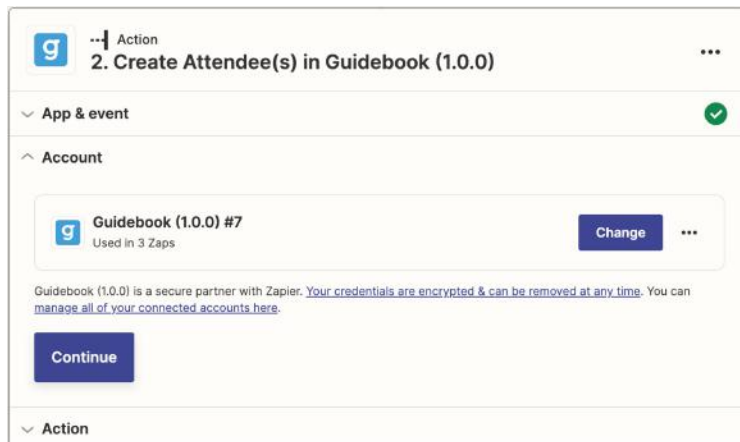

You're done with the Trigger!

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 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.

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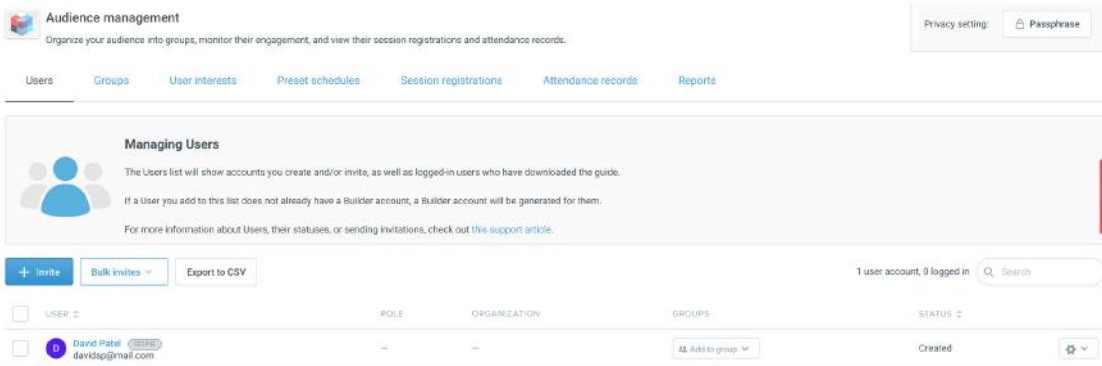
You can verify the test sent by checking the Audience Management section of the designated guide in Builder.


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.
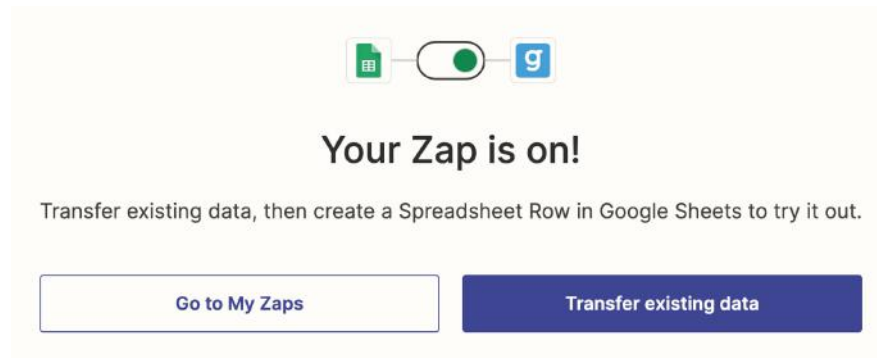

After selecting "Transfer existing data", you will see all the imported existing data. You can "Select All" and click "Next" at the bottom right of your screen.
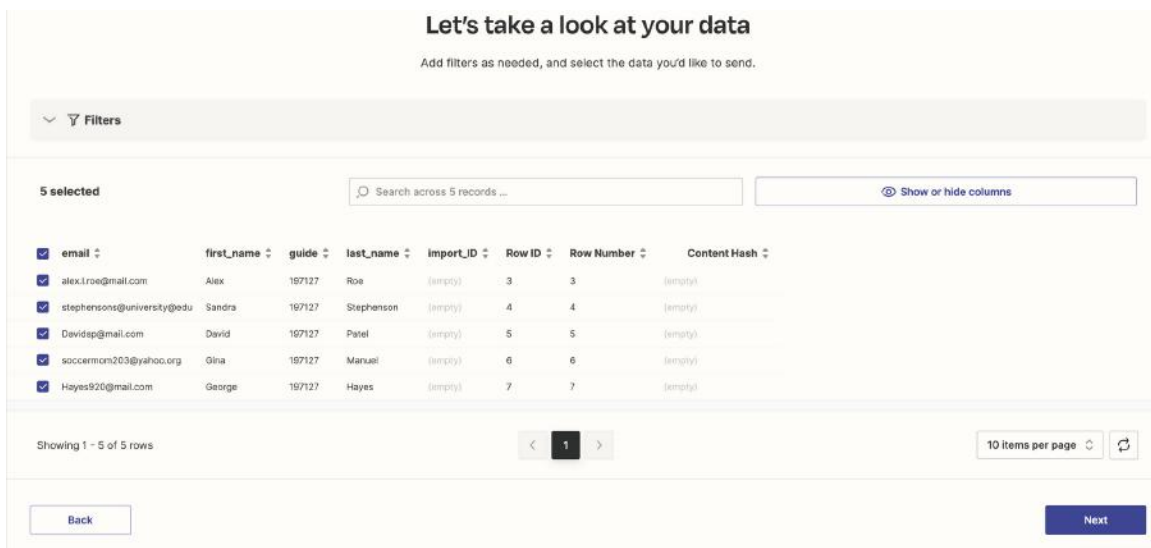
Guidebook will ignore duplicates for Attendees, so you do not need to be concerned about whether an attendee record has been sent over more than once.
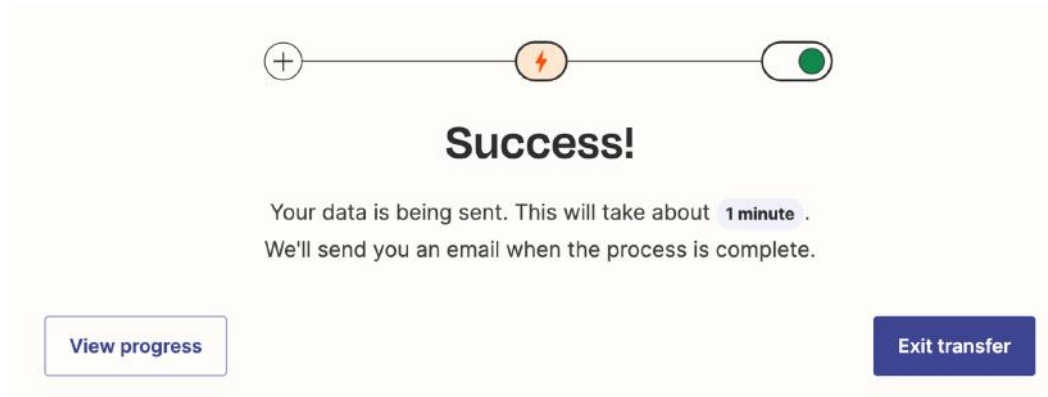
See that the test records sent over all populated in the Audience Management section of the guide successfully!
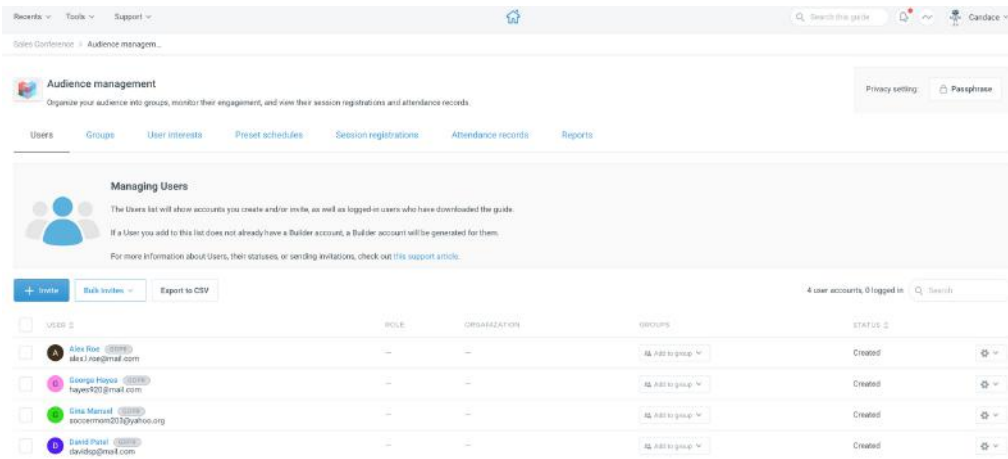
Note: The Sandra Stephenson user did not import because I accidentally had a typo in their email as stephensons@university@edu. You can see zap failures in detail in Zapier.

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

Added another attendee, Judith Smith

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.
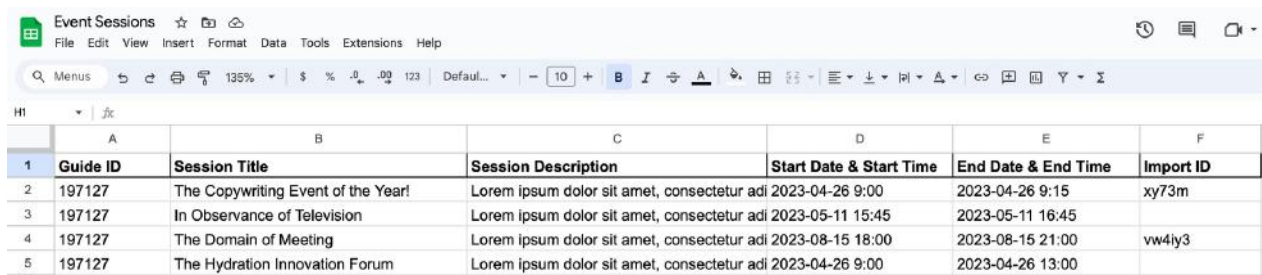
Required Information: guide ID, session title, session description, session start date & time, session end date & time
Additional, but not required: all day session, require login, add to schedule, import ID

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**
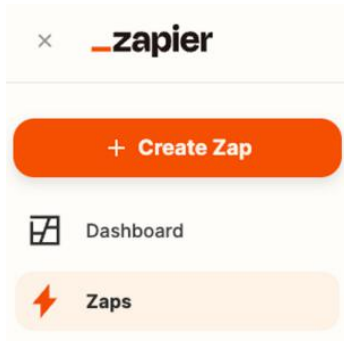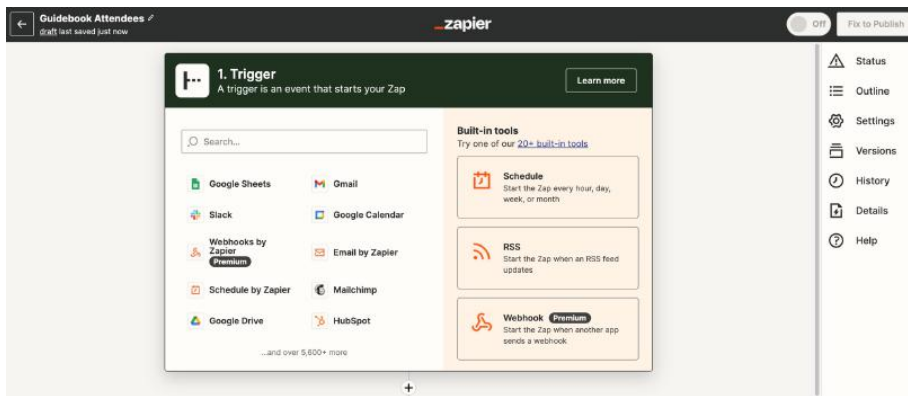
Here is an example of a sheet

A 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

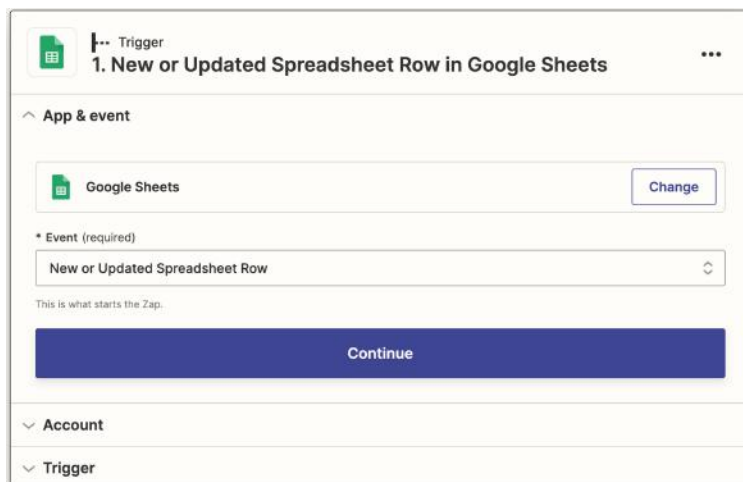Within Zapier, you will create a new Zap to get started.

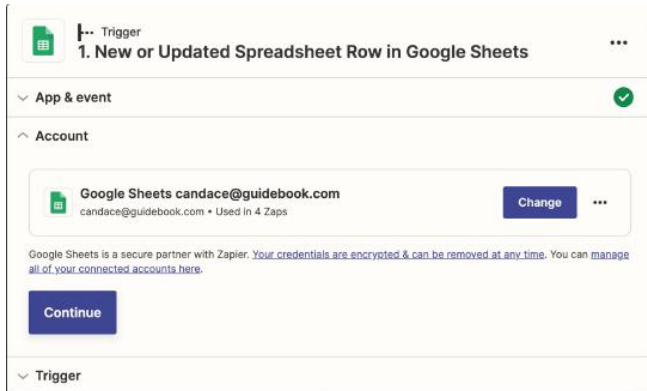You will title your Zap and set up your initial Trigger.

Select Google Sheets. You will need to select a Google Sheets Event to be associated with the Trigger.
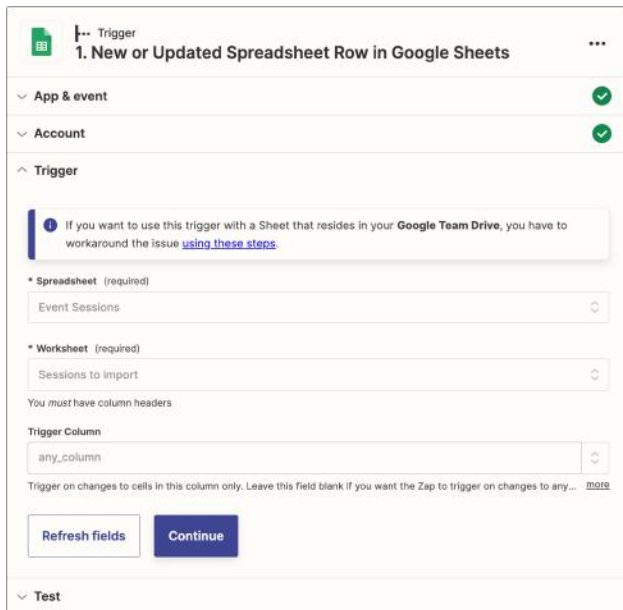
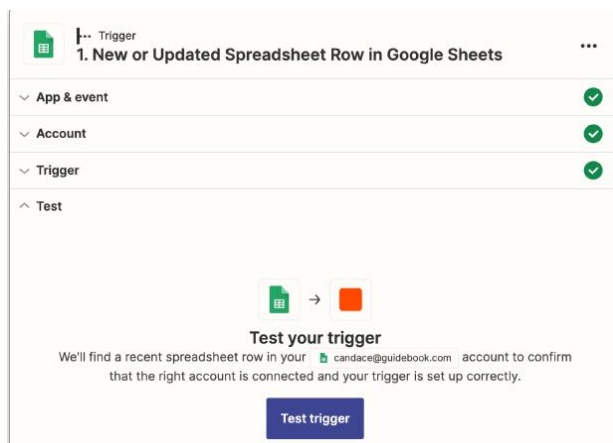[Zapier Support Article: **How to set up your Google spreadsheet to work with Zapier**]

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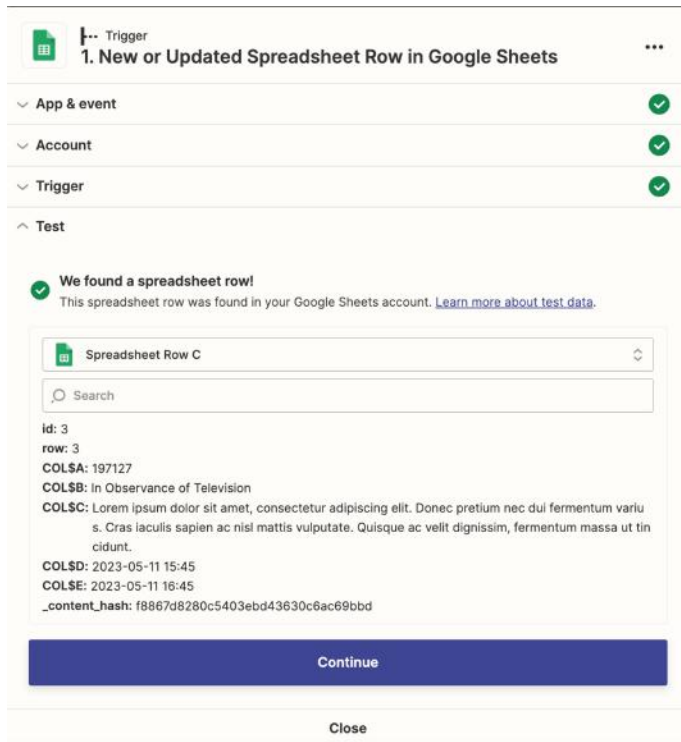

Select the specific Spreadsheet and Worksheet that the Zap will be getting information from.

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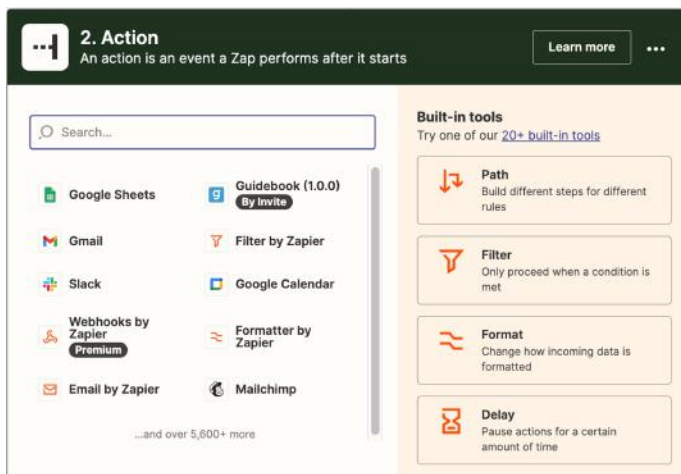

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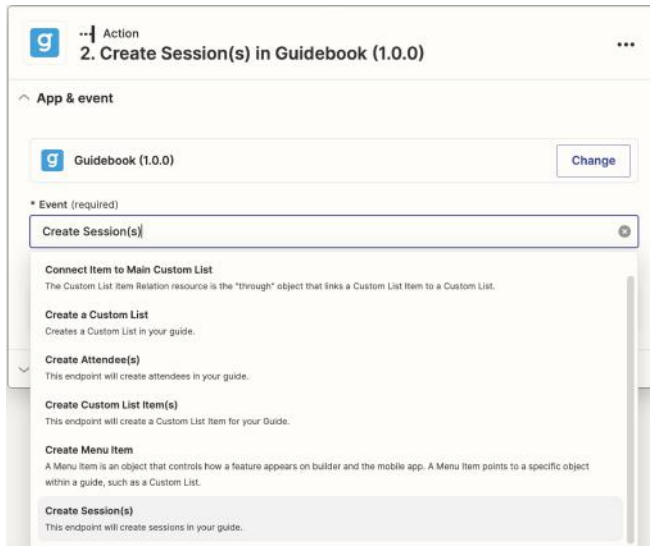The test will pull a test record based on the choices you made in previous steps.
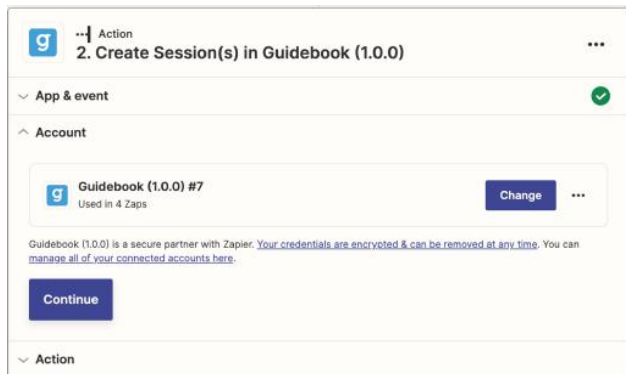

You're done with the Trigger!

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.

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 existing data". Every new record added after set up to the Google Sheet will 'zap' through on its own.
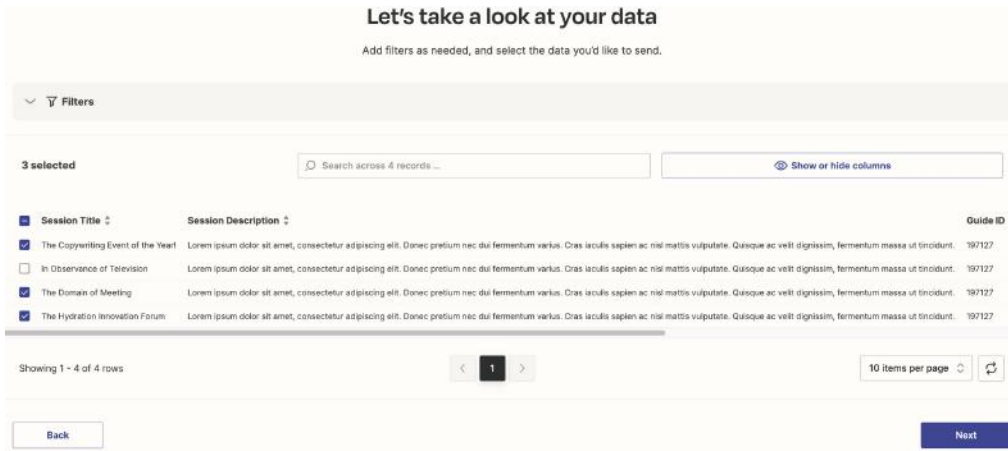

After selecting "Transfer existing data", you will see all the imported existing data. You can "Select All" and click "Next" at the bottom right of your screen.

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!

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

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

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.
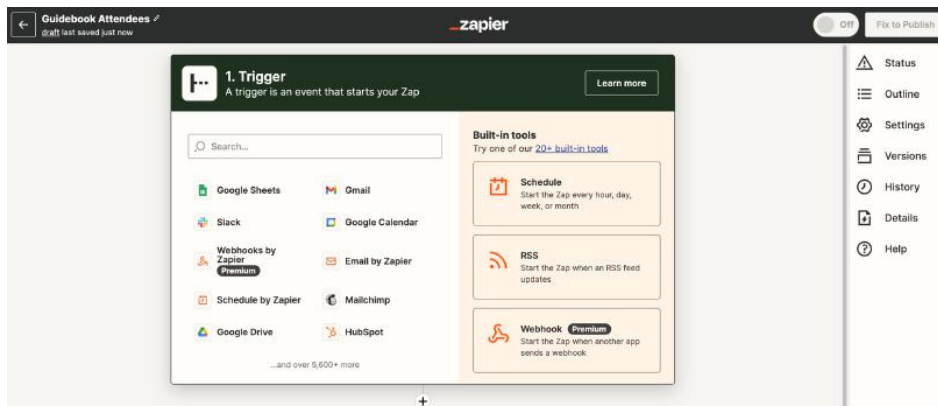
Here is an example of a sheet

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

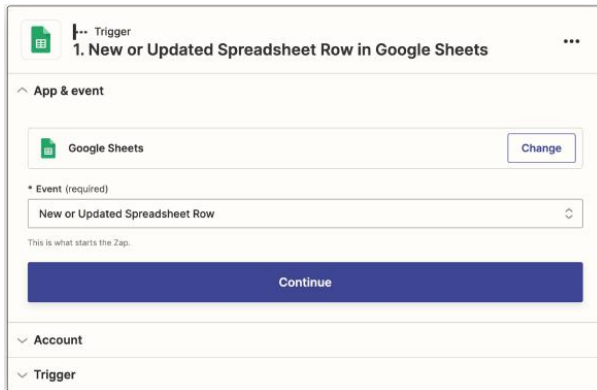Within Zapier, you will create a new Zap to get started.

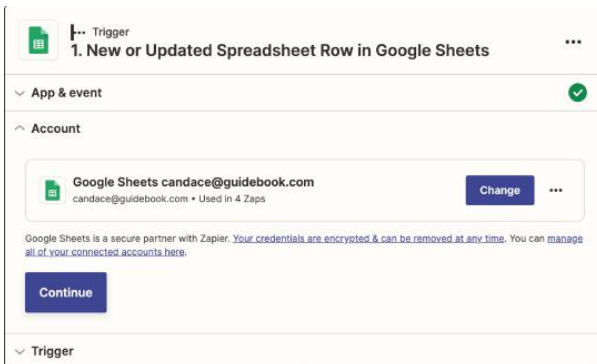You will title your Zap and set up your initial Trigger.

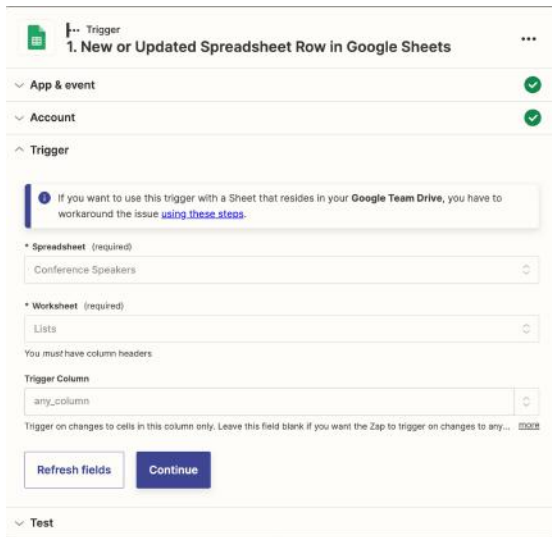Select Google Sheets. You will need to select a Google Sheets Event to be associated with the Trigger.

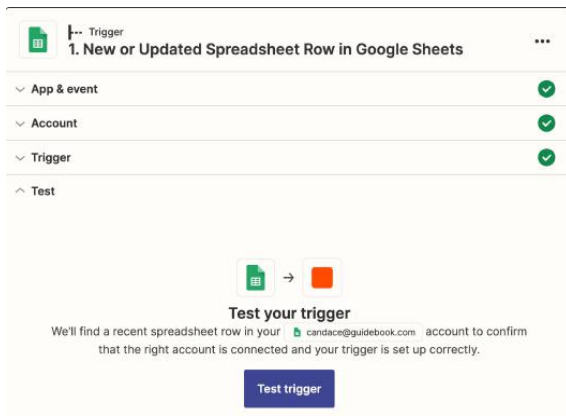[Zapier Support Article: **How to set up your Google spreadsheet to work with Zapier**]

Go through the flow to connect the necessary Google Sheets account. This account should have access to the source Google Sheet.
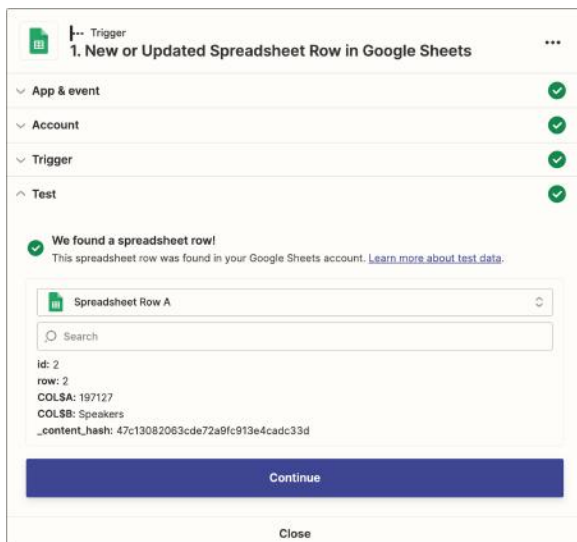
Select the specific Spreadsheet and Worksheet that the Zap will be getting information from.

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.
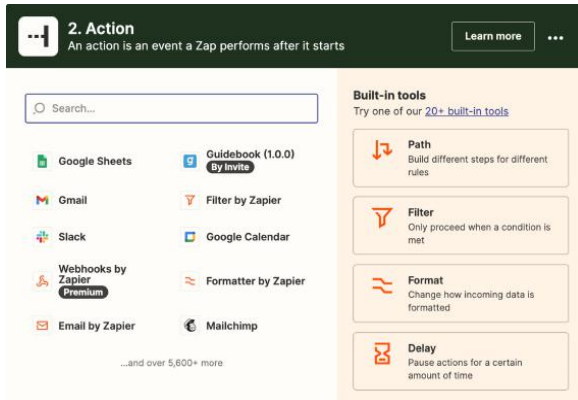

The test will pull a test record based on the choices you made in previous steps.
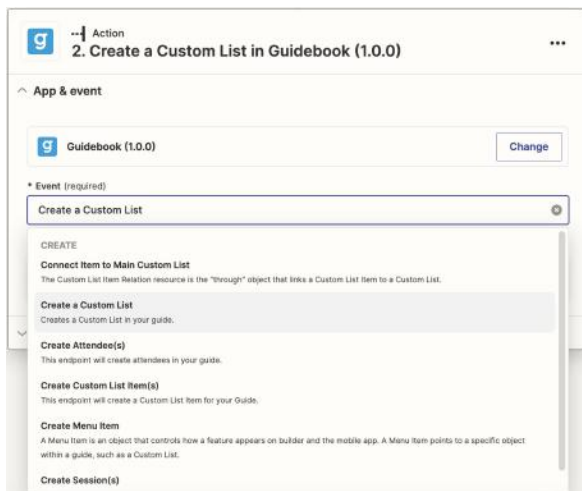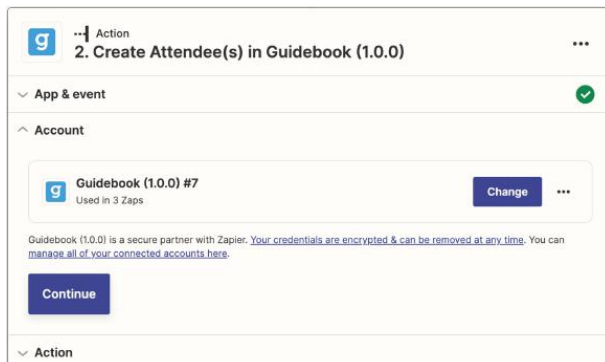
You're done with the Trigger!

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.

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.
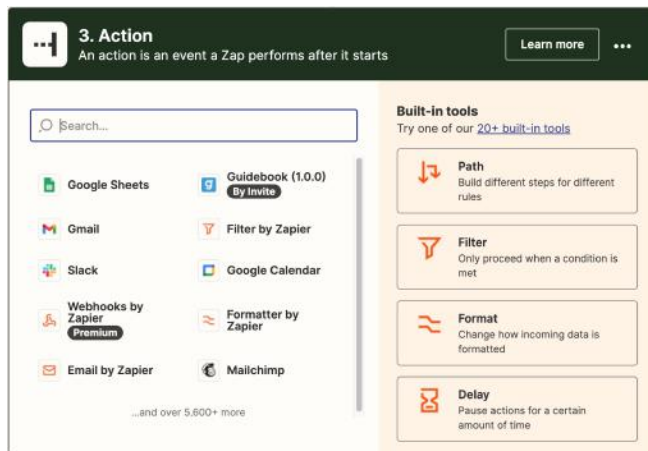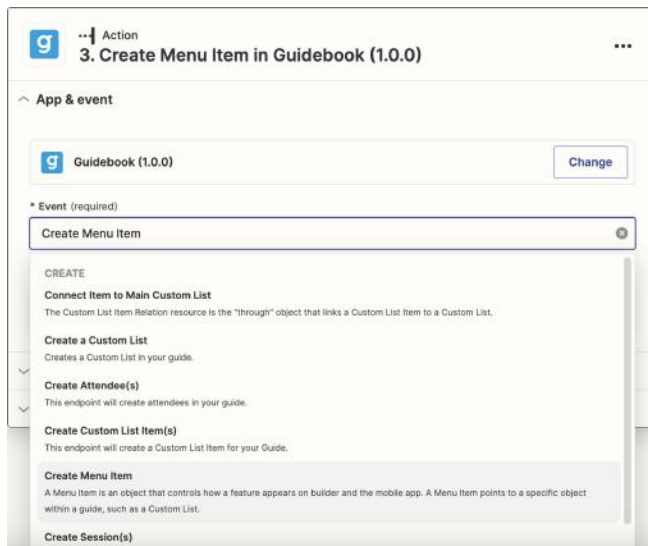

You can close this action.

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

You can see the Custom List on your Menu in Builder!
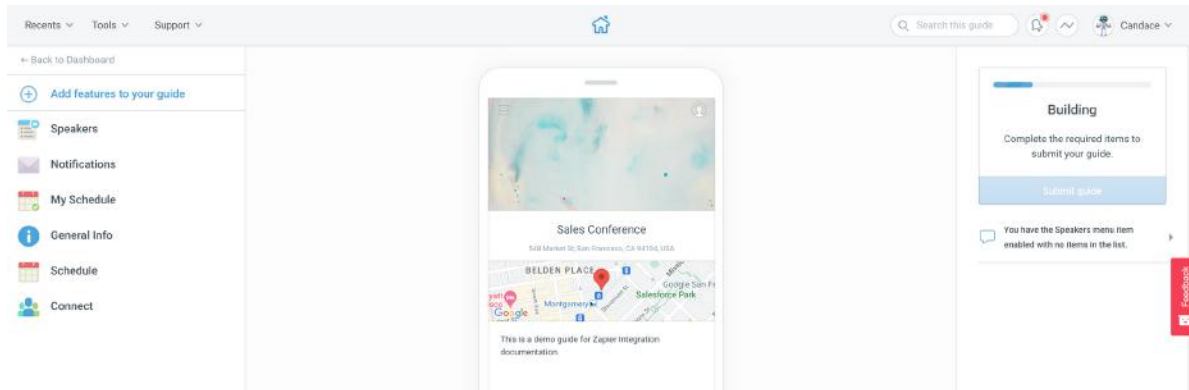
Copy and/or take note of the object_id value, you will need it when setting up your Zap to populate Custom List items. This object_id value is the same and will be referred to as Custom List ID.

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

Here is an example of a sheet

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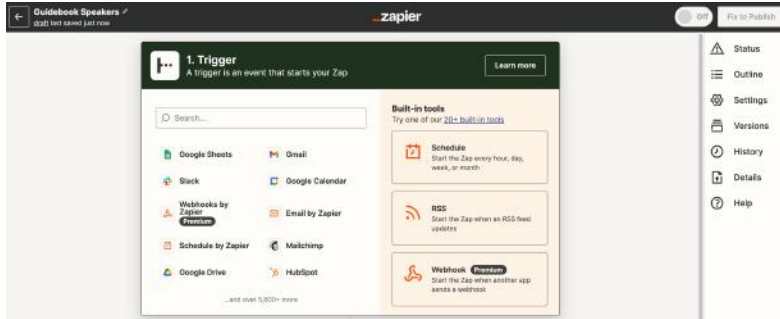
A sheet can have any other information in it. Later in the process you will decide which columns map to what fields in Builder. Column names do not need to be specific.

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.

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 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.
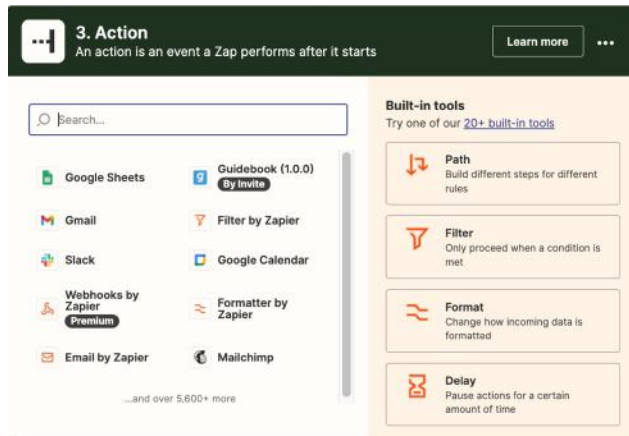

You won't see it in Builder just yet!
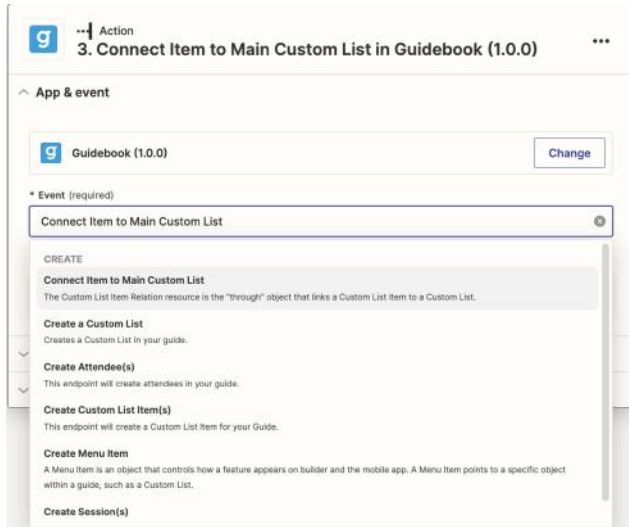You can close this action.

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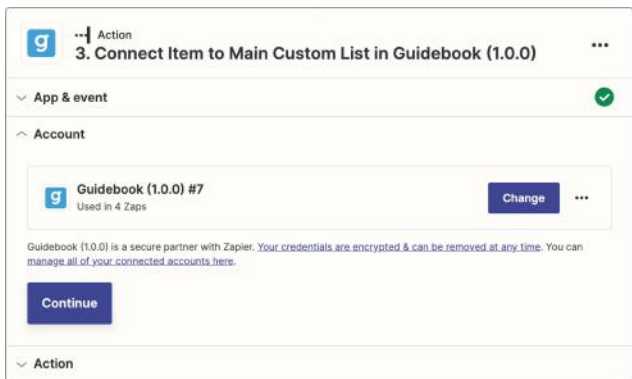
You will populate the Custom List Item ID from the returned fields from your first action.

You will populate the Custom List ID from the column in your source Sheet.
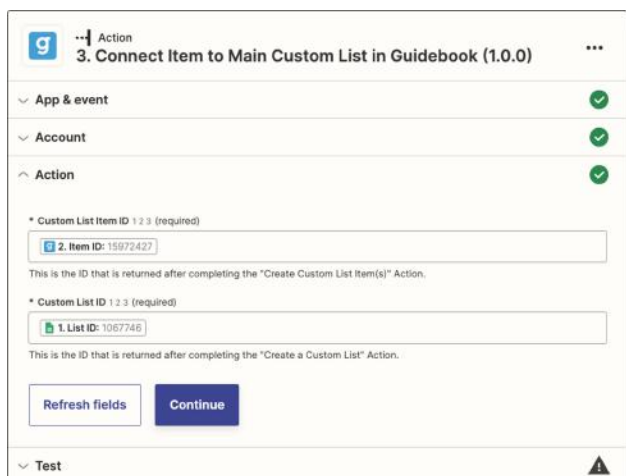
The test will continue and use the test data to complete this Action.

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.

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

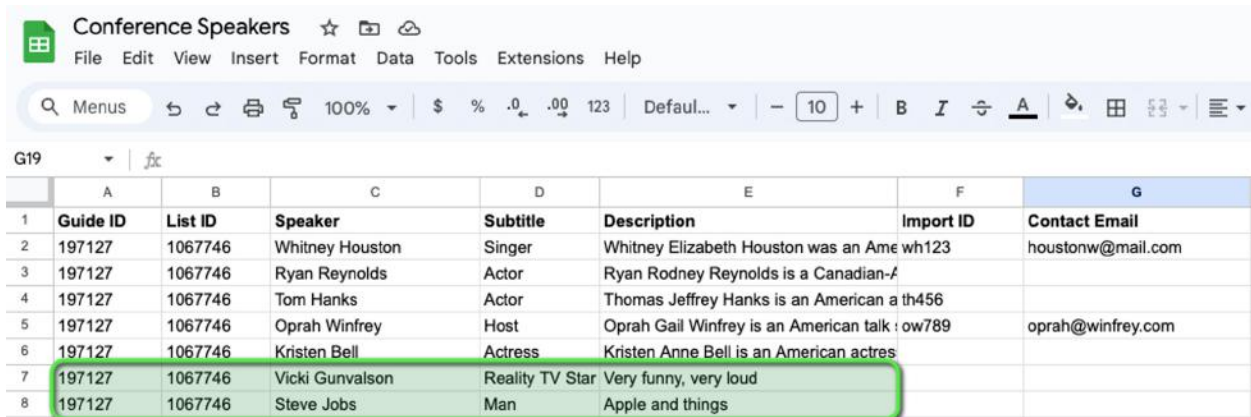You can see in these that the data was successfully sent!

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!