Honch

Our Zapier App Set Up Guide

Overview:

Each week Honch tracks hundreds of newly appointed decision-makers, providing the most accurate and reliable data on each new appointment. The contacts are fed into the system on a daily basis, making this immediately available to clients.

The Honch Zapier app allows you to sync this data to over 2,000 different business apps, ensuring it's available in any CRM or marketing system. The app allows you to customise the data you want to sync by job title, size of company and sector, ensuring you have the data you want, where you want it.

Creating Zaps For New Appointments:

1. **Login to Zapier:** Click "Make a Zap"
2. **Choose App & Event**: Type in Honch and select our app (please note that it will be called a Beta app for its first 3 months on the platform)
3. **Choose an Event:** You can sync contacts that are being added to the system, as well as contacts being removed to keep your own data accurate. Select "Newly Appointed" and click "Continue".
4. **Choose an Account:** You will need to login to Honch with your standard username and password the first time you start creating Zaps.
5. **Customise Contacts to Sync:** Here you can begin to populate the fields of contacts you want to sync. If left blank you will sync all new data that's added.
   - **Job title:** You can select individual or multiple job titles or keywords. For multiple keywords, please put them into separate boxes under this field.
   - **Sectors:** Leave blank for all, or select individual or multiple sectors for contacts.
   - **Employees from and to:** If you want to sync contacts from companies with a minimum or maximum number of employees simply enter the values.
   - **Revenue from (£) and to (£):** Type amounts in full, so for £1million type "1000000". If "Revenue – From (£)" is left blank you will sync contacts from companies with financials that are not reported.
   - **Seniority:** You can select to only sync contacts of a specified seniority level (director level etc.) and can multi-select these.
   - **Promotions:** If you want to exclude decision-makers that have been promoted into new roles, select "No"
   - **Email address:** To only sync contacts that have email addresses select "Yes"
6. **Test Trigger:** Once complete click "Continue" and then "Test Trigger". Zapier will now pull a sample record from Honch to ensure it's being received via your API. Click "continue".

Now let's sync:

7. **Choose App & Event** – You can now select from over 2,000 business apps of where to sync the data. You will need your login details ready, but select where you'd like the data sent, for example "Salesforce" or "Hubspot"
8. **Choose an Event** – This is where you'll tell the system what you want to be created. For CRMs you should look for options to "create/update contact". Please note that Zapier will never override system settings around duplicate data etc. Once the event is selected click "Continue"
9. **Login/Choose your account** – You will be asked to login to the system that you're looking to sync with
10. **Customise** – You will now need to match fields the data fields in Honch to the data fields in your own system. Honch will allow you to sync any of our data points, but all are optional.
11. **Send Data** – Once you've matched you will test the Zap by sending one sample contact to your system. Click "Test & Continue"
12. **Turn on Zap** - Once you're happy simply click "Turn on Zap"

Once created the Zap will sync data daily between 12.00am-2am each morning. You will have the latest data available in your system when you get to work the next day.

For any further questions or assistance simply email us at clients@honch.co

Creating Zaps For Contacts Being Removed From Honch:

You can also create Zaps of contacts being removed from our platform, allowing you to keep your own data up-to-date. We would advise you to sync these initially to an Excel of Google file, along with the reason for them being removed. From here you can then sync with your CRM.

Follow the steps above, but select Newly Deleted under the event section. You will now see an additional field available to sync to your system called Reason For Removal. This will populate telling you the contact has either left the business, or has unsubscribed from Honch.