

CLUBREADY FACEBOOK LEAD ADS VIA ZAPIER

V6-11-2018

Abstract

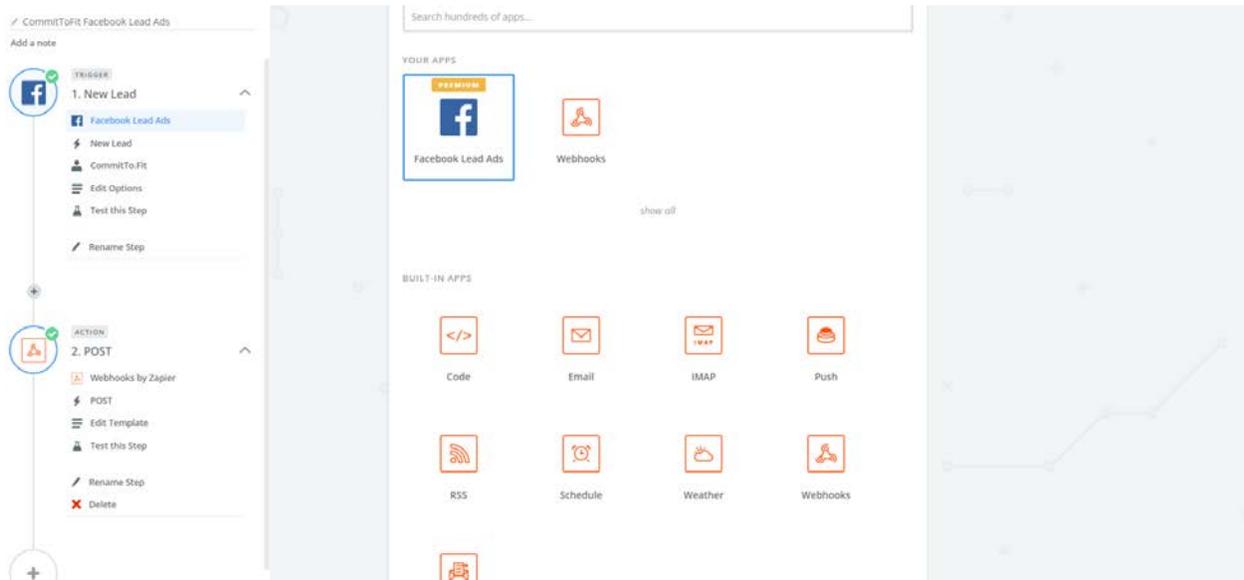
This document is designed to provide a quick overview of how to collect leads from Facebook Lead Ads using Zapier and the ClubReady API.

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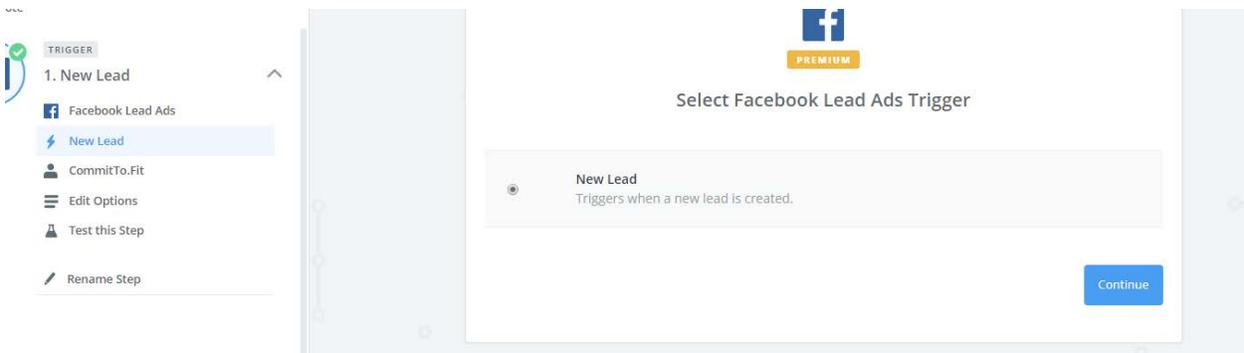
To collect Facebook Lead ad results, and have them automatically entered in as Leads/Prospects into your ClubReady site, you will want to leverage a service like Zapier.com. Zapier is a web application that allows you to link multiple APPS together via APIs. Specifically, Zapier has a Facebook Lead Ads app which can be used to connect Zapier to ClubReady to collect the Leads.

To utilize the Facebook Lead Ads app in Zapier, you will need to sign up for their \$20/month plan.

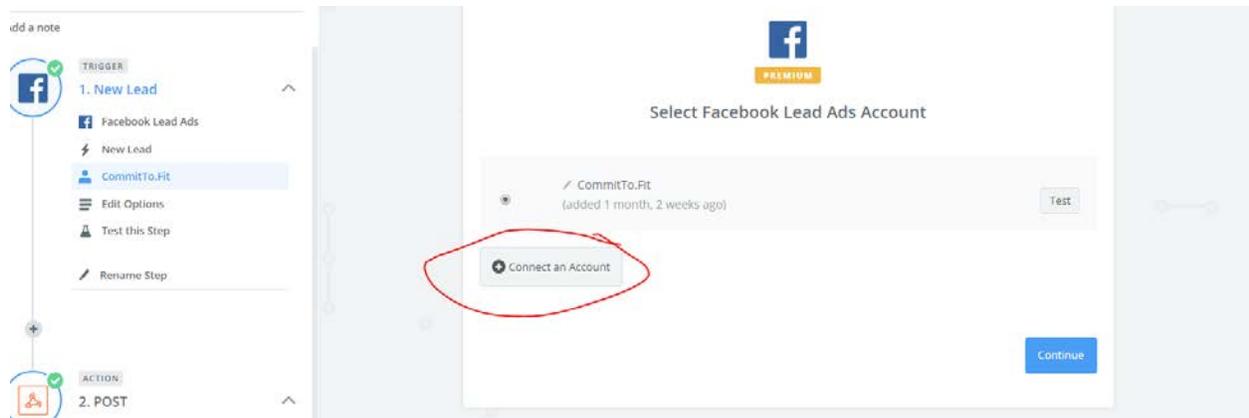
When you create your first “Zap” you can search for the Facebook Lead Ads app, and choose that.



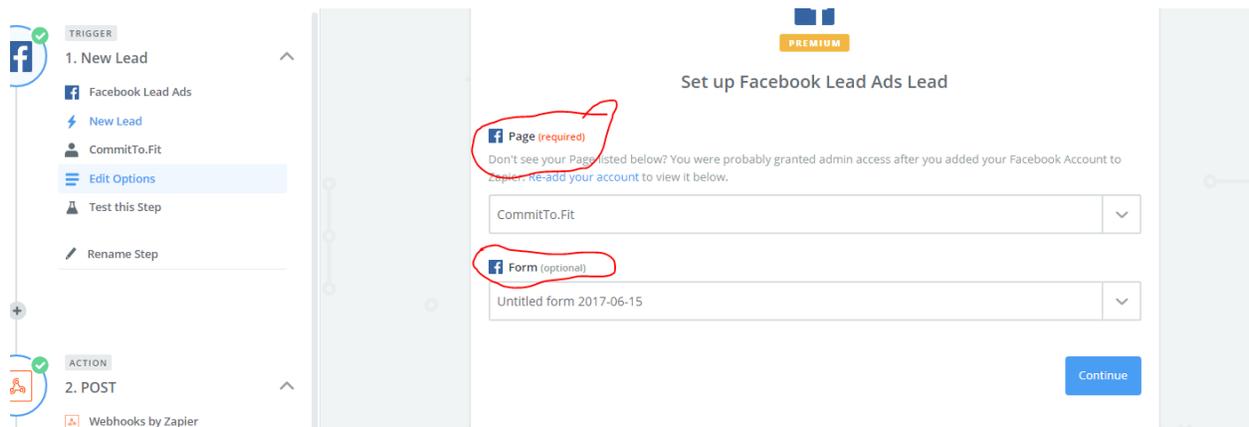
Once you have selected the Facebook Lead Ads app, you choose the trigger, which is “New Lead”. Click “Save + Continue”.



Your next step is to Connect to the Facebook Lead Ads account that you have setup, click on the “Connect an Account” button to open the window that will take you through an authorization process with Facebook.

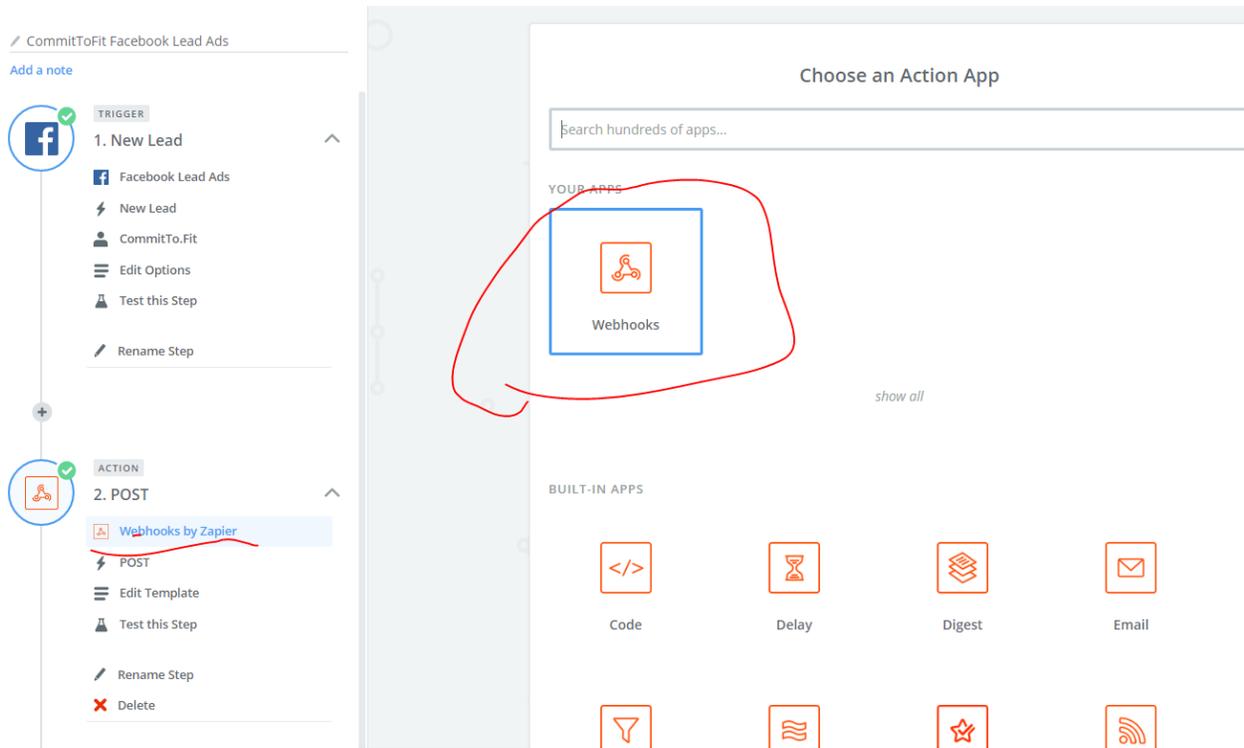


Once you have chosen the Facebook account you will be allowed to configure the Page (required) that you want to collect Lead Ads for, and then also you can choose the Form that you've configured in Facebook to a specific selection in the Zap settings.

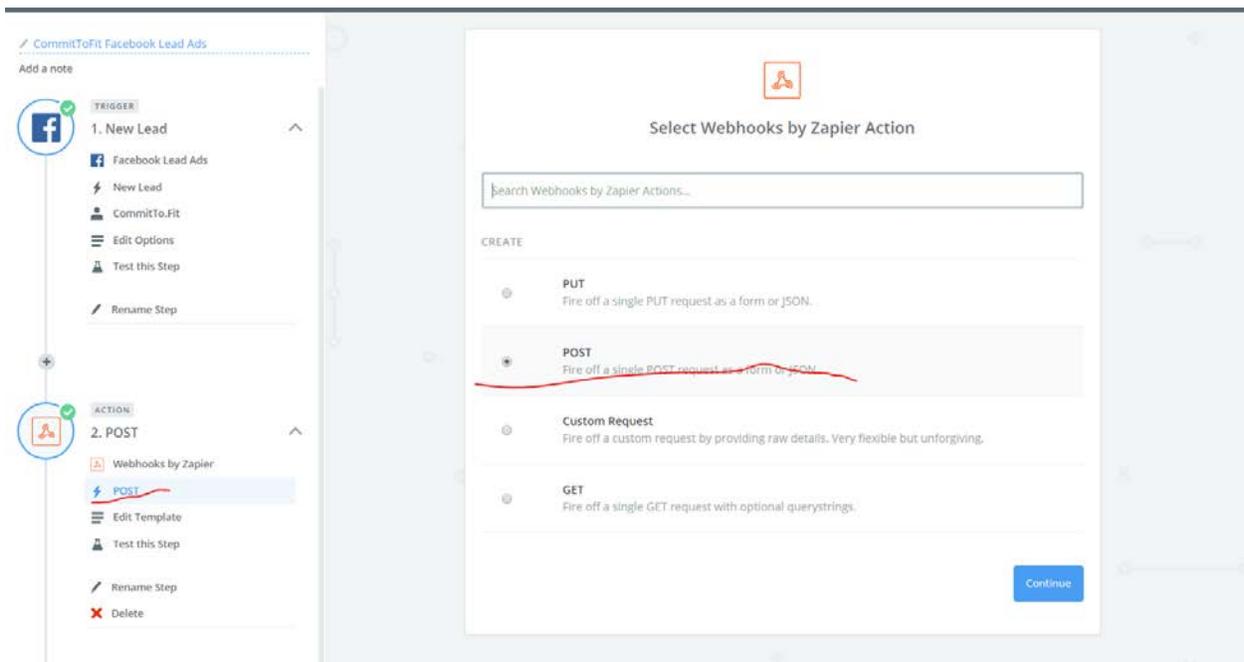


Clicking Continue on this screen will take you through a test process which will try to create a lead in Facebook.

Next you need to configure the "ACTION" for your Zap, what it does once a Lead is created. This is where you will now connect to ClubReady using the "Webhooks" action in Zapier.



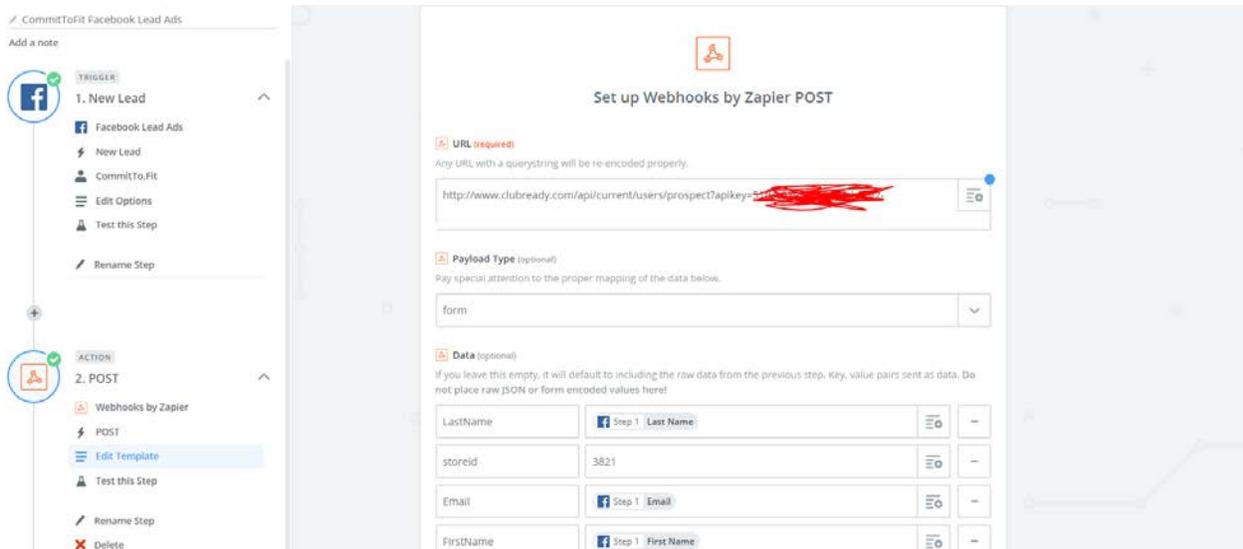
To configure the webhook you need to choose the POST method.



You will enter the URL for the POST call, using the URL

<https://www.clubready.com/api/current/users/prospect?apikey=>

You also need to put your APIKEY into that url after the apikey= parameter. Your API Key is provided by ClubReady, if you don't have an API Key already, please reach out to support@clubready.com for details on how to obtain your key.



Your Payload Type will be set to FORM.

Your Data section needs to be populated with the Parameters that the ClubReady API needs in order to create a Lead/Prospect. You can find these fields documented at

<https://www.clubready.com/api/current/metadata#!/users/CreateProspectRequest>

Typically you are going to use the fields in the screenshot below (storeid, lastname, firstname, email, CellPhone). You can also pass in a Referral Type (referralttypeid) or Lead Type (prospecttypeid) if you want to categorize these leads into ClubReady by their source. The demographic information for the user will come from the Facebook lead form, demonstrated in the screenshot. The StoreID and referralttypeid or prospecttypeid are values that you will need to populate in Zapier, you should have obtained a StoreID when you requested your API Key.

Data (optional)

If you leave this empty, it will default to including the raw data from the previous step. Key, value pairs sent as data. Do not place raw JSON or form encoded values here!

LastName	Step 1 Last Name		-
storeid	.		-
Email	Step 1 Email		-
FirstName	Step 1 First Name		-
CellPhone	Step 1 Phone Number		-
			+

Wrap Request In Array (optional)

Wraps the request in an array if that is something the service requires.

no

File (optional)

A file object to be attached to the request. The request will automatically be converted to `multipart/form-data`, with the above payload type defining the sub content-type for the data being passed.

Unflatten (optional)

By default we convert fields with underscores into nested dictionaries. Select no here to turn this behavior off.

yes

Basic Auth (optional)

You can obtain a list of Lead types (prospect types) via the ClubReady API by calling the `/club/lead-types` endpoint, documented via

<https://www.clubready.com/api/current/metadata#!/club/GetProspectTypesRequest>

There is an equivalent URL for referral types at `/clubs/referral-types` documented via

<http://www.clubready.com/api/current/metadata#!/club/GetReferralTypesRequest>

Once you have configured the webhook you can save your Zap and test the process out. When you test, Zapier should create a Lead in your ClubReady site that you can find via the Prospects/Leads lookup page in ClubReady.



Test Webhooks by Zapier

✔ Test Successful!

Alright got it! You can [view your post](#) to make sure everything looks OK.
We'll use this as a sample for setting up the rest of your Zap.

↻ Re-test Webhooks by Zapier to get another post

Add a step

or

Finish