BookingKoala to GoHighLevel Integration

Sample workflow documentation | Zapier + Bookin60

Purpose: Send booking events from BookingKoala through Zapier to Bookin60 (GHL), keeping contacts, opportunities, follow-up tasks, and customer communications aligned.

Scope: New quotes, new bookings, booking updates, completed bookings, and cancellations. This document describes the sample setup; it is not a record of completed testing. Items requiring confirmation are listed separately.

Integration overview

BookingKoala supplies the event. Zapier passes the relevant data to GHL. GHL handles the tags, Sales Pipeline stages, notifications, tasks, and follow-up sequences described below.

The original screenshots below show the available BookingKoala events in Zapier.

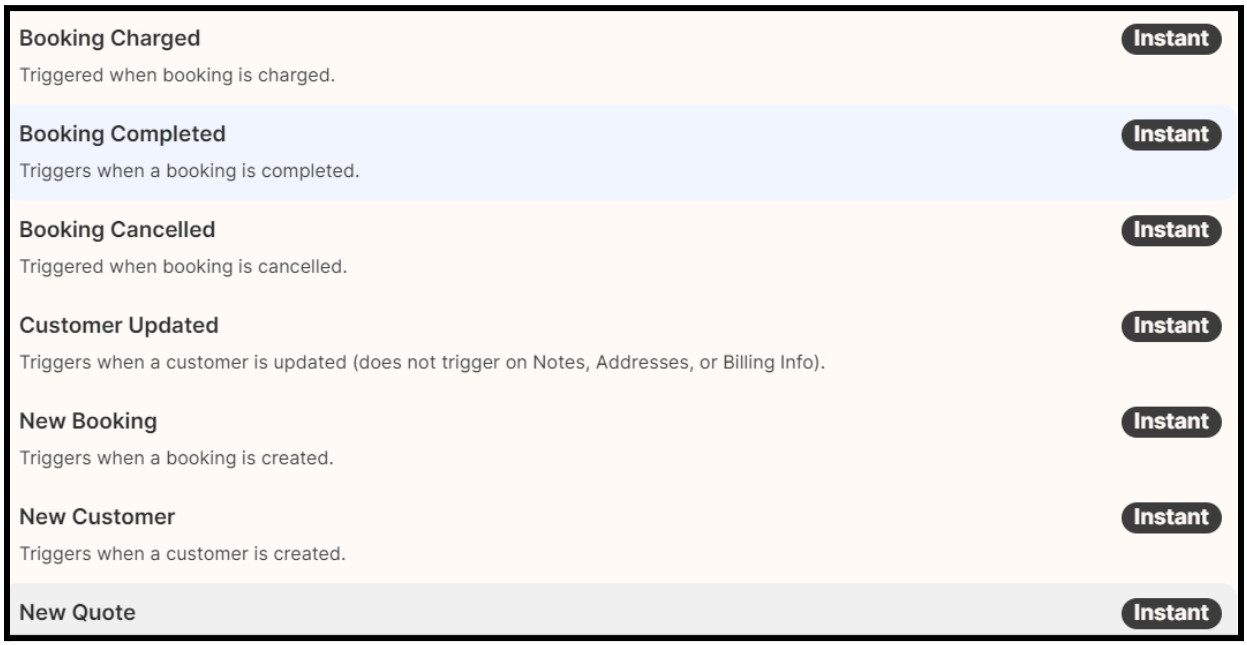

Figure 1. BookingKoala events shown in Zapier.

Figure 2. Additional events, including Booking Updated.

Events used in this setup: New Quote, New Booking, Booking Updated, Booking Completed, and Booking Cancelled. All opportunity stages below belong to the Sales Pipeline.

1. New quote

Trigger: BookingKoala | New Quote

1. Create the contact in Bookin60 using the basic contact information and quote-request details from BookingKoala.
2. Add the contact tag “new quote”.
3. Create an opportunity in the New Lead stage.
4. Assign a user to follow up and create a task due within one day.
5. Send the cleaning company an internal email and SMS notification about the quote request.

Pipeline reference

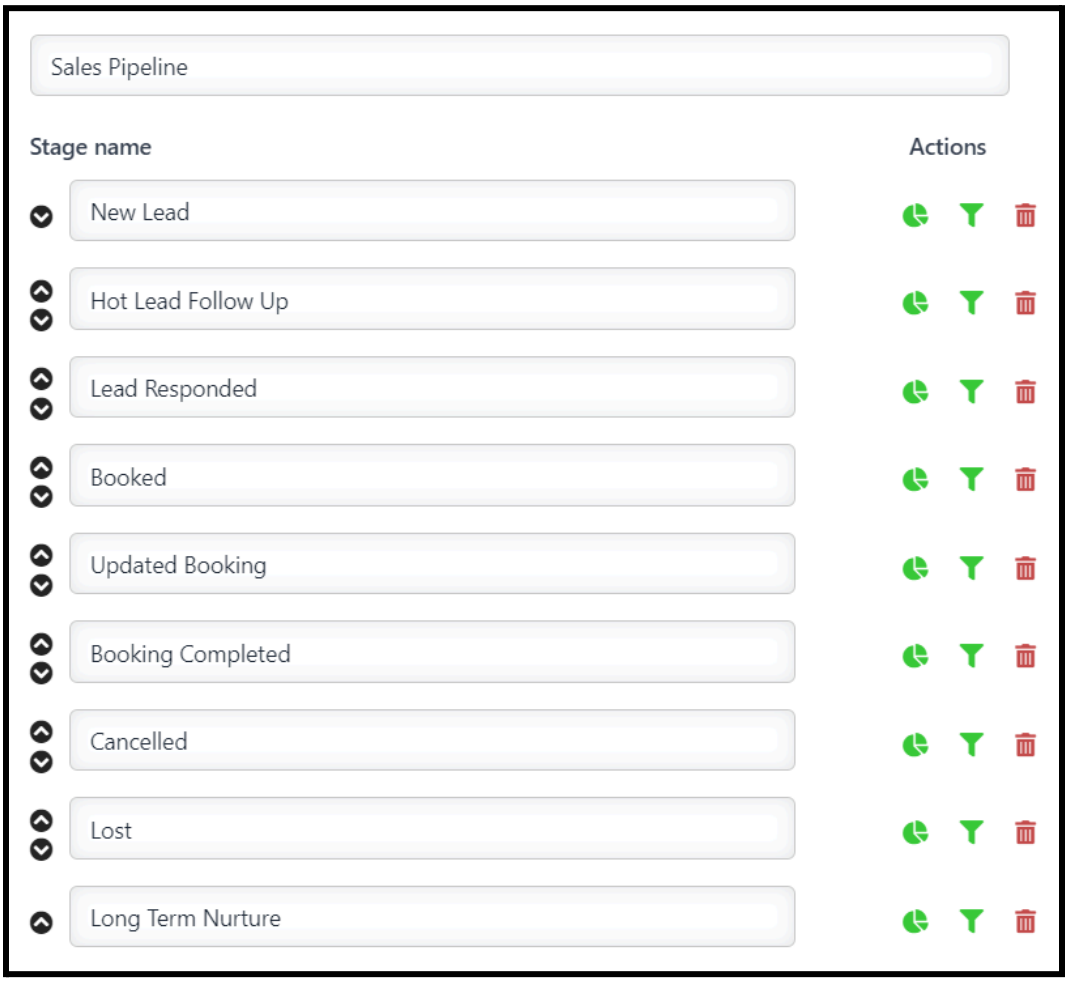

Figure 3. Sales Pipeline stages from the sample setup.

Quote notification

Hi {{user.first_name}},

Follow up for New Quote Received

Name: {{contact.name}}
Phone: {{contact.phone}}
Email: {{contact.email}}

Kindly check your Sales Pipeline or Contact List.

Figure 4. Quote notification using contact details and CRM links.

Conditional follow-up

- After one day without the expected lead action, enroll the contact in the Quote Nurture Campaign and move the opportunity to Hot Lead Follow Up. The exact “no action” condition needs confirmation.
- If the lead responds to the nurture sequence, move the opportunity to Lead Responded and send an internal notification to the cleaning company.

2. New booking

Trigger: BookingKoala | New Booking

1. Remove the “new quote” tag and add “booked”.
2. Move the opportunity to Booked.
3. Send the cleaning company an internal email and SMS notification about the new booking.
4. Check whether the customer is new or existing, and whether the service is recurring or one-time.
5. Add “upsell” for one-time customers. Add “customer” when a new lead becomes a customer.

3. Booking updated

Trigger: BookingKoala | Booking Updated

1. Add the “booking updated” tag.
2. Move the opportunity to Updated Booking.
3. Send the cleaning company an internal email and SMS notification with the updated booking details.

Completion-only follow-up: The original notes also listed review and referral emails here. Their intended timing is documented under Booking completed below. Confirm that an ordinary booking update cannot send these emails or start a duplicate sequence.

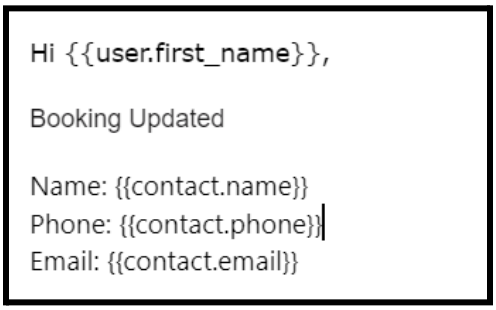

Figure 5. Booking-update notification template.

4. Booking completed

Trigger: BookingKoala | Booking Completed

1. Remove “booked” and/or “booking updated”, whichever are present.
2. Add the “completed” tag.
3. Move the opportunity to Booking Completed.
4. Send the review email one day after the job is completed.
5. Send the “Refer Us” email two days after the review email.
6. Enroll the customer in the Monthly Special Occasion Nurture Campaign.

Timing to verify: These delays come from the original written notes. Figure 9 shows a Send Review Request action before a Wait - 1 Day step, so check the live workflow before treating the stated review timing as confirmed.

5. Booking cancelled

Trigger: BookingKoala | Booking Cancelled

1. Remove “booked” and/or “booking updated”, whichever are present.
2. Add the “cancelled” tag.
3. Move the opportunity to Cancelled.
4. Send the cleaning company an internal email and SMS notification about the cancellation.
5. Create a follow-up task for the contact’s assigned user. The sample task is due in one day.
6. Enroll the contact in the Monthly Special Occasion Nurture Campaign.

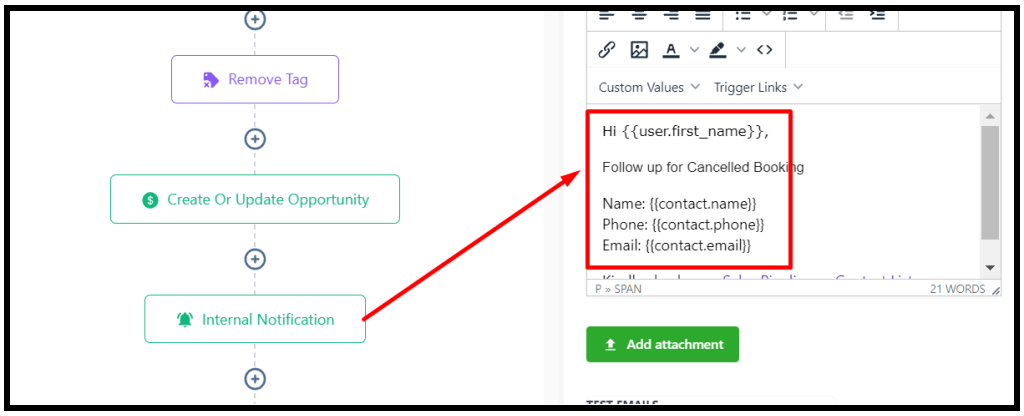

Figure 6. Internal cancellation notification.

Cancellation follow-up task

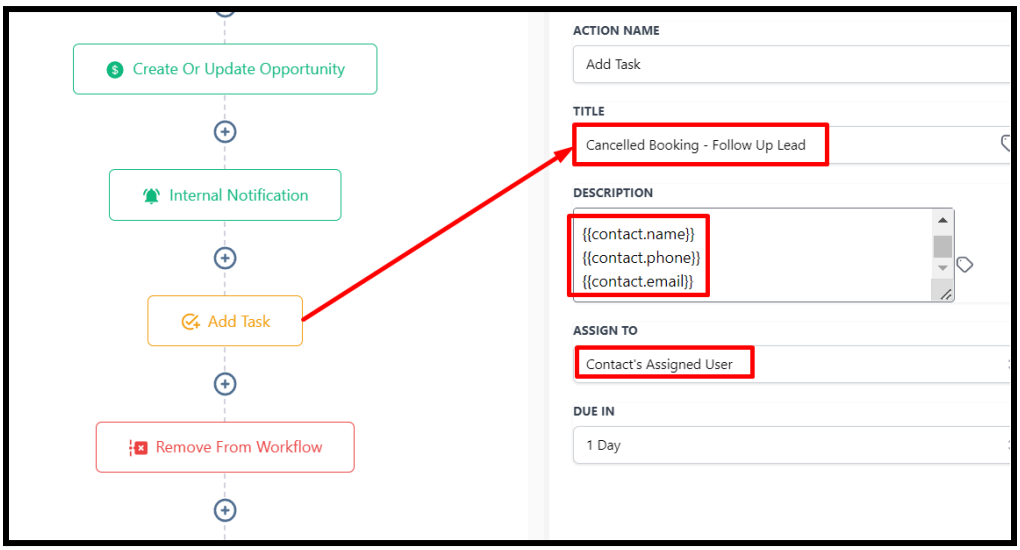

Figure 7. Follow-up task assigned to the contact's owner, due in one day.

Items to confirm before launch

- Data mapping and record matching: Document the exact source fields, required values, and contact/booking identifiers. Confirm how a repeat booking updates or creates an opportunity without duplicating contacts.
- Quote nurture: Define what counts as "no action" and when the sequence stops. Confirm how replies, new bookings, and cancellations affect pending follow-ups.
- Review and referral sequence: Resolve the difference between the written delays and Figure 9. Confirm that completion starts the sequence only once for the intended booking.
- Routing and timing: Confirm notification recipients, assignment rules, task due times, account time zone, and what happens when the contact has no assigned user.

- Customer messaging: Confirm eligibility for nurture, the handling of opt-outs, and whether cancelled customers should receive the same campaign as completed customers.

QA checklist

Recommended checks, not completed test results. Use test records and controlled recipients; record the expected result, actual result, evidence, and any issue for each test.

- Run one test for each of the five BookingKoala events. Confirm the Zapier run and the intended GHL workflow execution.
- Check mapped contact and booking fields, tags, opportunity stage, assigned user, and task due date.
- Verify email/SMS recipients and rendered message content, including merge fields and CRM links.
- Test both quote branches: no action after the delay, and a lead reply. Also test a booking made while quote follow-up is pending.
- Test new/existing customers and one-time/recurring bookings. Confirm the correct branch and tags.
- Test missing fields, a repeated event, and multiple bookings for one contact. Confirm exceptions are visible and repeat events do not create unintended messages or records.
- Check completion and cancellation against pending messages. Verify review/referral timing, opt-out handling, and nurture eligibility before approval.

Workflow reference screenshots

These original screenshots support the written steps. They also show additional waits and branch actions; reconcile those details with the live account before using this document as a final handoff.

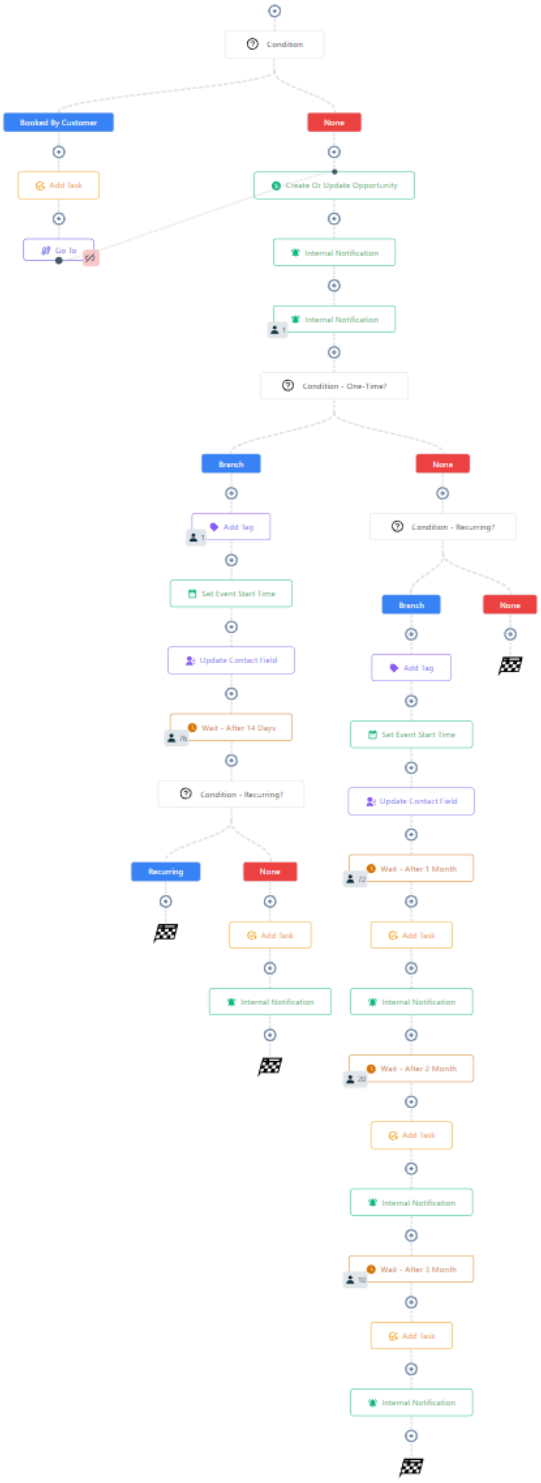

Figure 8. One-time and recurring booking branches with follow-up actions.

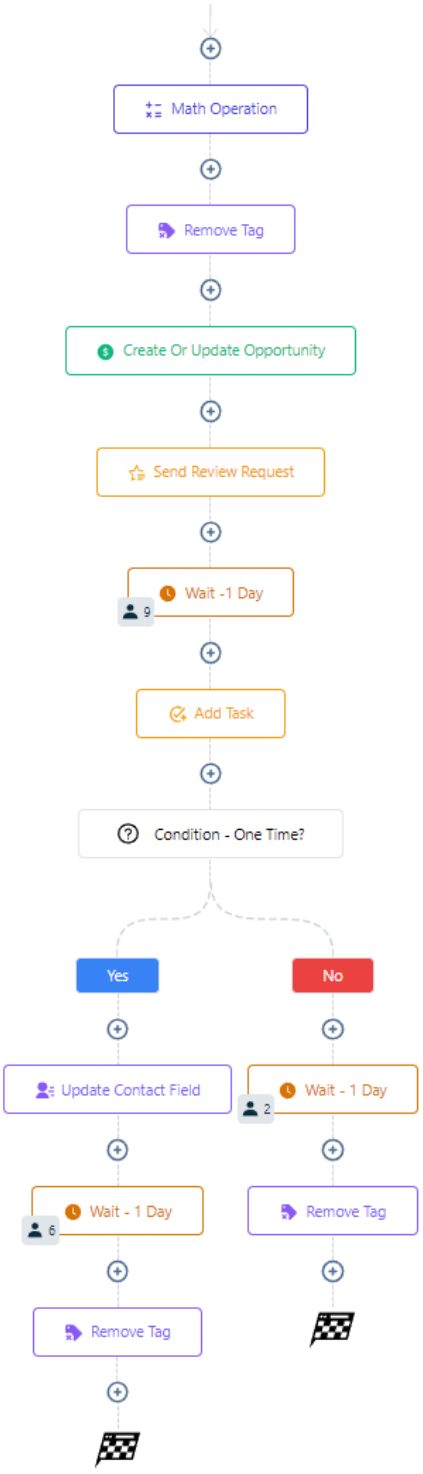

Figure 9. Review-request action and one-time-customer branch.