



Breakout Session: Zapier

Automate your _____.



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Digital Mettle

Sponsor Introduction



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Zapier & Novi

Powerful, Customized, Automation



Agenda

- What is Zapier
- How to get started
- Let's Build! Set up a Zap from scratch
- Open Discussion
 - Ask questions
 - Hear from others in the room using Zapier (real life use cases!)



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slido



What is your Zapier experience level?

① Start presenting to display the poll results on this slide.

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What plan do you use with Zapier?

① Start presenting to display the poll results on this slide.

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What is Zapier?

Zaps, Triggers, & Actions... Oh My!



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Zapier Definitions

Let's make sure we're all on the same page about word usage.


- **Zapier** is a tool that lets you create automated workflows for repetitive tasks between two or more apps.
- **Zap**: An automated workflow in Zapier that tells your apps to follow this simple command: "When this happens, do that."
- **Task**: When a Zap runs, each action it *completes* counts as one task.
- **Trigger**: An event that starts a Zap.
- **Action**: What your Zap does for you.




What does that look like?

The parts of a simple Zap.




Novi-Intercom - New Novi User - Live Customer - Slack CX tea... 

y2 published by  Meg P. Oct 31, 2022


Zap

Trigger


 Trigger
1. New User in Intercom

↓

Action(s)

 Action
2. Only continue if...

↓

 Action
3. Send Channel Message in Slack

What does that look like?

The parts of a complex Zap.

Novi: New Discovery, Demo, Debrief, Deep Dive - Add to Pipedrive - Slack G... zapier

x2 published by Meg P. Jan 30, 2023

Zap

Trigger

1. Invitee Created in Calendly

Action(s)

2. Only continue if...
3. Only continue if...
4. Text in Formatter by Zapier
5. Utilities in Formatter by Zapier
6. Find User in Pipedrive
7. Find Person in Pipedrive
8. Paths

A Person Found
Contains 3 steps [View](#)

B Person Not Found
Contains 2 steps [View](#)



How to Get Started



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Getting Started with Zapier

1. Create an account! Start with the free trial or the free tier.
2. Start small. Create a simple zap for just yourself or a colleague.
3. Allow yourself the time and space to learn.
4. Ask for help and share ideas!





Let's Build!

2 Ways to Build a Zap



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Additional Resources

Never stop learning!

- Each Other!
 - Novi Exchange
- Novi Help Articles
 - <https://help.noviams.com/en/?q=zapier>
- Zapier Help Articles:
 - Help Center: <https://zapier.com/help>
 - Quick Start Guide: <https://zapier.com/learn/zapier-quick-start-guide/>
 - Zapier 101: <https://zapier.com/learn/university-course-101/>



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