

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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What is your Zapier experience level?

(i) Start presenting to display the poll results on this slide.









What plan do you use with Zapier?

(i) Start presenting to display the poll results on this slide.





What is Zapier?

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





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.

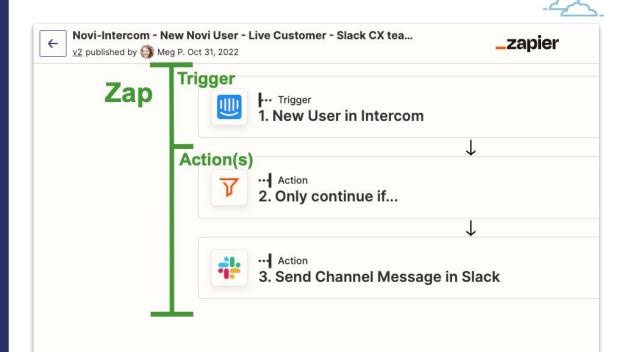




What does that look like?

The parts of a simple Zap.

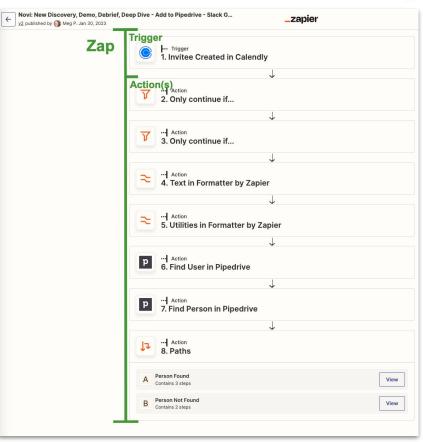




What does that look like?

The parts of a complex Zap.







How to Get Started







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
 - o 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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