

## About Zapier

Zapier is a platform for connecting and automating interactions between different apps. These automations are called “**zaps**”, with each zap comprised of a “**trigger**” (something occurring in the first app that causes the automation to run—the input) paired with an “**action**” (something the zap will cause to happen in the second app—the output).

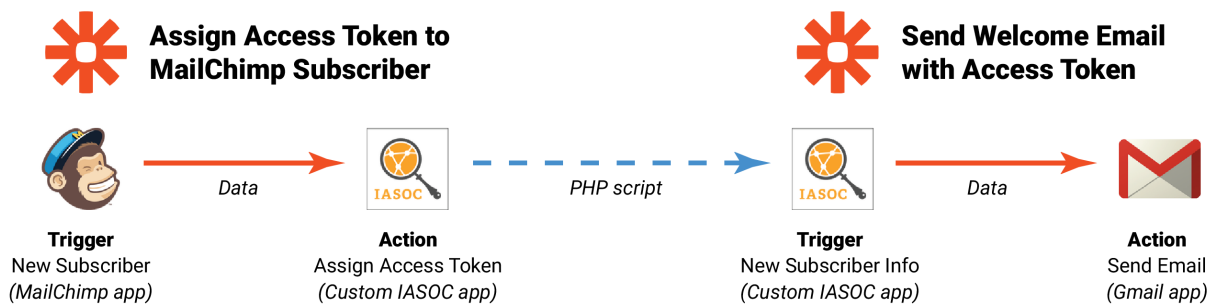
Read more here:

<https://zapier.com/learn/how-to-use-zapier/triggers-actions-zaps/>

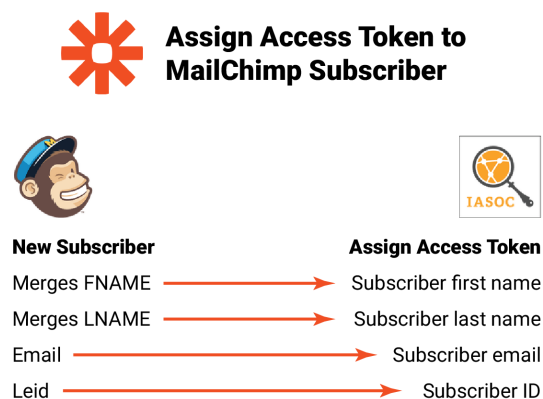
<https://zapier.com/help/creating-zap/>

## Our Zaps

For this project, we have two separate zaps that chain together three different apps: the MailChimp app, the Gmail app and a custom IASOC app.

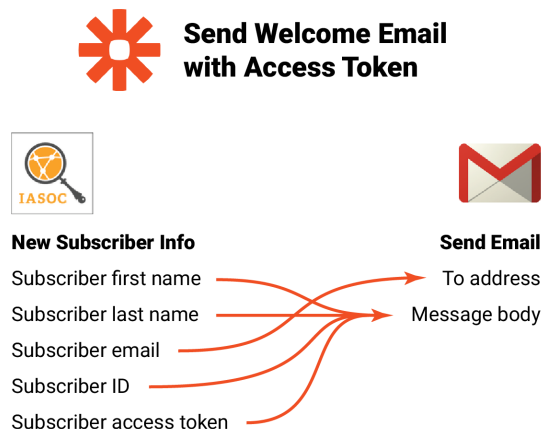


Our first zap is triggered when the MailChimp app reports a new subscriber (the MailChimp app’s “**New Subscriber**” trigger). This zap (“**Assign Access Token to MailChimp Subscriber**”) takes relevant subscriber information from the MailChimp app and passes it to a custom IASOC app.



This custom app takes the subscriber info passed from MailChimp and, through a custom PHP script, assigns a unique access token to the subscriber before triggering our second zap.

This second zap (“**Send Welcome Email with Access Token**”) takes the subscriber info and access token and hands it off to the Gmail app, which sends the subscriber a welcome email (through the Gmail app’s “**Send Email**” action).

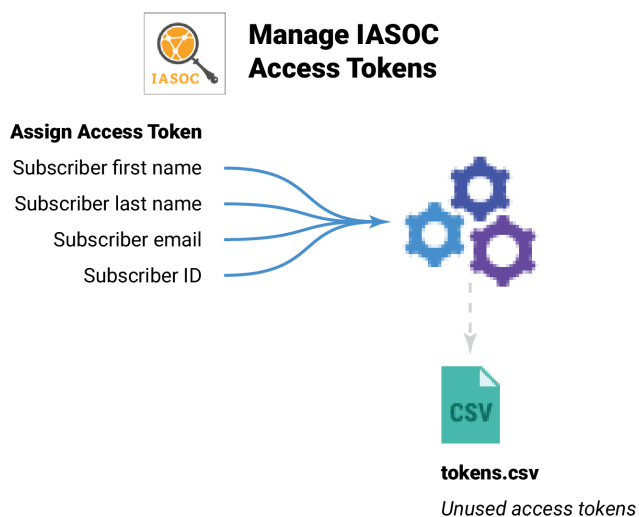


## Our App

Our custom app (called “**Manage IASOC Access Tokens**”) defines one action and one trigger.

### Action: Assign Access Token To New Subscriber

The app’s action receives subscriber info from our first zap and passes it to our PHP script. The script assigns a unique access token to the subscriber (from tokens.csv) and alerts Zapier that this info (the subscriber info combined with the subscriber’s assigned access token) is available for triggering the next zap.



## Trigger: New Subscriber Info With Token

This trigger is used to activate our second zap after a new subscriber has been assigned a unique access token, sending the zap this subscriber's info and token.



## Custom PHP

The action in our custom app sends data to and activates a custom script written in PHP. The primary script is named **zap.php**, but it needs a number of other files to function.

### ▼ files

members.csv

tokens.csv

### ▼ logs

requests.txt

### ▼ resources

targets.json

sample.php

subscribe.php

unsubscribe.php

zap.php

### files/tokens.csv

A list of unused access tokens. A single column with a header labeled "token". As tokens are assigned to subscribers, they are automatically removed from this list. New tokens may be added manually to this file so long as the formatting isn't changed.

This is the only file expected to ever need to be updated manually.

## files/members.csv

A list of registered subscribers with their associated email addresses, MailChimp subscriber IDs (“LEID”) and unique access tokens. The CSV is formatted in five columns with the headers “id”, “fName”, “lName”, “email” and “token”. When a new subscriber is processed by the script, they are automatically added to this list.

This file may be useful to refer to as a record of subscriptions, but it isn’t expected to be edited manually.

## logs/requests.txt

A text file logging all requests to the script, line by line with timestamps. Successfully processed requests and errors are both noted.

## resources/targets.json

A data file the script uses to keep track of URLs to push results to.

## sample.php

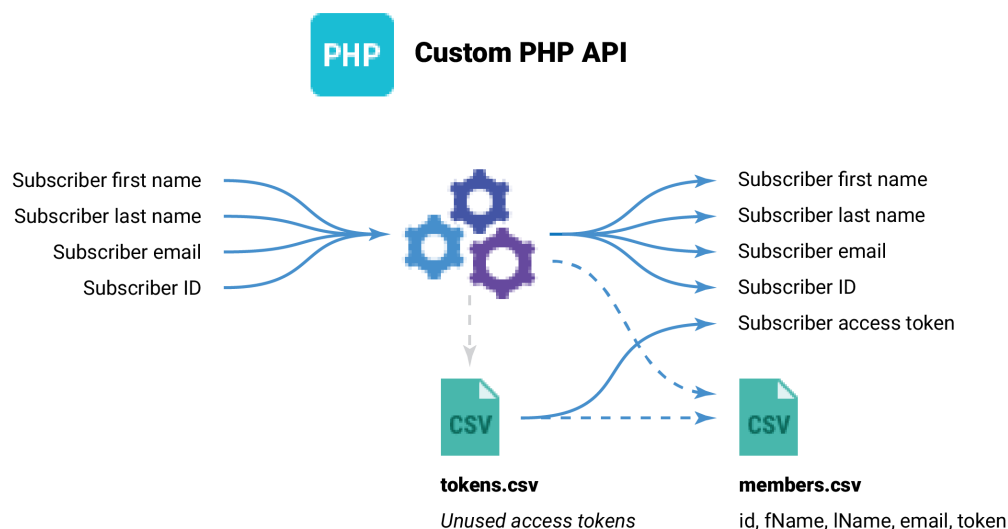
Provides Zapier a URL through which it can see sample output of our app.

## subscribe.php and unsubscribe.php

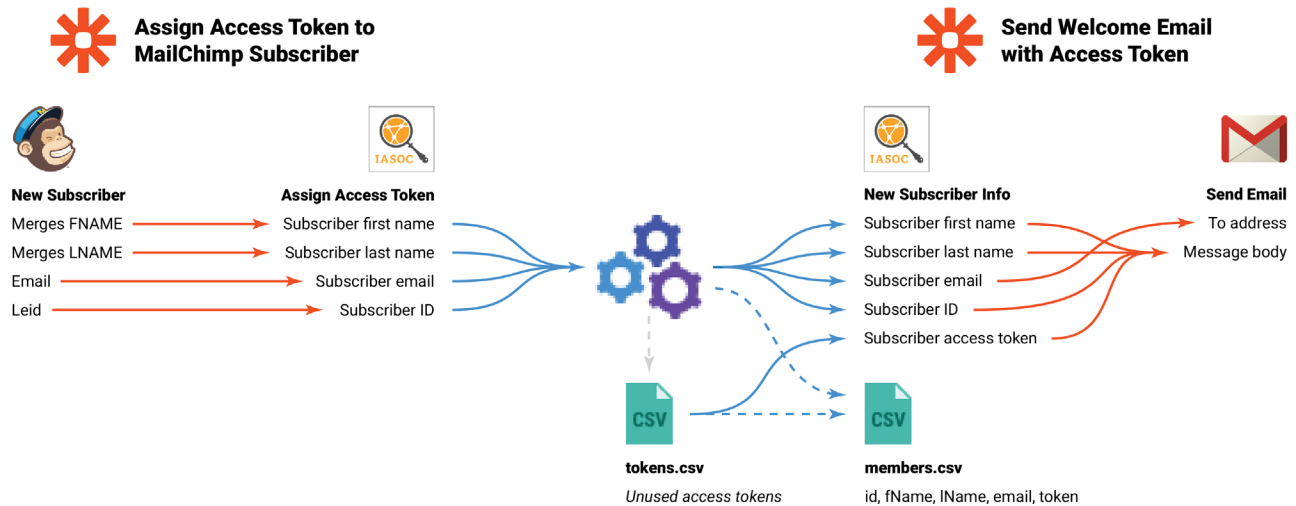
Provide the functionality that allows Zapier to hook into and unhook from our app trigger.

## zap.php

The main PHP script that gets triggered by Zapier. This script is sent subscriber info through the “Assign Access Token” action on our custom IASOC app. It first checks **members.csv** to see if this subscriber has already been assigned a token. If so, it selects that as their token. Otherwise, it selects an unused token from **tokens.csv** and adds the new subscriber and token info to members.csv. Finally, it sends the subscriber info, with the appropriate token, back to Zapier via the “New Subscriber Info With Token” trigger on our custom IASOC app.




# App Setup




The custom PHP and its accompanying files should be hosted on the IASOC server. Once they are uploaded there and accessible (retaining their folder structure), the following URLs should be edited within Zapier to reflect its location...


## Apps > Manage IASOC Access Tokens > Edit New Subscriber Info With Token > Where Data Comes From

<https://zapier.com/developer/builder/app/11111/triggers/11111/edit/backend>

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MAKE A ZAPI!

 FREE PLAN



Apps &gt; Manage IASOC... &gt; Edit New Subscriber I...

SHARED ZAPS


DOCUMENTATION

1. Name and Description → 2. Trigger Fields → 3. Where Data Comes From → 4. Sample Result


REST Hooks

<http://www.example.com/sample>


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Apps > Manage IASOC... > Trigger Settings

SHARED ZAPSDOCUMENTATION

REST Hook Subscribe URL (optional)

Convenience URL setting for subscribing to Trigger events delivered via REST Hooks. Can contain auth field & trigger field variables: `https://{{account}}.example.com/api/v1/hooks`. [Read More](#)

http://www.example.com/subscribe

REST Hook Unsubscribe URL (optional)

Convenience URL setting for unsubscribing from Trigger events delivered via REST Hooks. Can contain auth field & trigger field variables: `https://{{account}}.example.com/api/v1/hooks`. Most developers modify the URL via our scripting API to refer to the original subscription that needs removed. [Read More](#)

Test Trigger (optional)

Select the trigger we'll use to verify a user's auth credentials. A good test trigger returns a 200 on success or a 300+ on failure. [Read more.](#)


None

SaveCancel


Get help

## Apps > Manage IASOC Access Tokens > Assign Access Token To New Subscriber > Where To Send Data


<https://zapier.com/developer/builder/app/11111/actions/11111/edit/backend>


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FREE PLAN





Apps > Manage IASOC... > Edit Assign Access To... 

SHARED ZAPS

DOCUMENTATION

1. Name and Description → 2. Action Fields → 3. Where To Send Data → 4. Sample Result

These options let you define the appearance/behavior of an Action. [Read more.](#)

**Action Endpoint URL** (required)  
A JSON only URL to POST to. Can have variables:  
[https://example.com/api/v1/users/{{field\\_id}}/contacts.json](https://example.com/api/v1/users/{{field_id}}/contacts.json) [Read More](#)

http://www.example.com/zap

**Custom Action Fields URL** (optional)  
Dynamically load action fields (custom fields). Can have variables:  
<https://{{account}}.example.com/api/v1/users/fields.json> [Read More](#)

Save & Next

Cancel

You

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## Apps > Manage IASOC Access Tokens > Scripting API

<https://zapier.com/developer/builder/app/11111/scripting>

```
1 'use strict';
2
3 var Zap = {
4   pre_subscribe: function(bundle) {
5     bundle.request.method = 'POST';
6     bundle.request.headers['Content-Type'] = 'application/x-www-form-urlencoded';
7     bundle.request.data = $.param({
8       url: bundle.subscription_url
9     });
10    return bundle.request;
11  },
12  post_subscribe: function(bundle) {
13    // must return a json serializable object for use in pre_unsubscribe
14    var data = JSON.parse(bundle.response.content);
15    // we need this in order to build the {{webhook_id}}
16    // in the rest hook unsubscribe url
17    return {webhook_id: data.id};
18  },
19  pre_unsubscribe: function(bundle) {
20    bundle.request.method = 'DELETE';
21    // bundle.subscribe_data is from return data in post_subscribe method
22    bundle.request.url = 'http://www.example.com/unsubscribe?id=' + bundle.subscribe_data.webhook_id;
23    bundle.request.data = null;
24    return bundle.request;
25  }
26 }
27 };
```

Save

Available Methods

Quick links

Get help



# Zap Configuration

The zaps can be configured via the dashboard here: <https://zapier.com/app/dashboard>

## The MailChimp account is specified here

<https://zapier.com/app/editor/1111111/nodes/1111111/auth>

[Dashboard](#) → Choose Account

YOUR ZAP IS ☐ ON ☒ OFF

Assign Access Token to MailChimp Subscriber

✓

TRIGGER

1. New Subscriber

MailChimp

New Subscriber

IASOC MailChimp Account

Edit Options

Test this Step

+

✓

ACTION

2. Assign Access Token To N...

Manage IASOC Access Tokens

Assign Access Token To New S...

Select MailChimp Account

IASOC MailChimp Account

(added 3 months, 3 weeks ago)

Test

Connect a New Account

Continue

## The mailing list to be used from that account is specified here

<https://zapier.com/app/editor/1111111/nodes/1111111/fields>

[Dashboard](#) → Set Up Trigger Options

YOUR ZAP IS ☐ ON ☒ OFF

Assign Access Token to MailChimp Subscriber

✓

TRIGGER

1. New Subscriber

MailChimp

New Subscriber

IASOC MailChimp Account

Edit Options

Test this Step

+

✓

ACTION

2. Assign Access Token To N...

Manage IASOC Access Tokens

Set up MailChimp Subscriber

List (required)

IASOC Paid 2015-16

▼

Continue

## The welcome email can be written here

<https://zapier.com/app/editor/1111111/nodes/1111111/fields>

Dashboard → Set Up Send Email Template

YOUR ZAP IS OFF

Send Welcome Email with Access Token

1. New subscriber info with ...

Manage IASOC Access Tokens

New subscriber info with token

Edit Options

Test this Step

+

2. Send Email

Gmail

Send Email

IASOC Gmail Account

Edit Template

Test this Step

Set up Gmail Email

To (required)

Who will this email be sent to? Use + button to separate additional addresses.

Step 1 Email

-

+

Cc (optional)

Who should be cc'd on this email? Use + button to separate additional addresses.

-

+

Bcc (optional)

Send Welcome Email with Access Token

1. New subscriber info with ...

Manage IASOC Access Tokens

New subscriber info with token

Edit Options

Test this Step

+

2. Send Email

From Name (optional)

Customize the from name (but must be sent via the email address you connected).

+

Subject (required)

Welcome email subject line goes here

+

Body Type (optional)

plain

▼

Body (required)

Welcome email body copy goes here.

+

The message body can be customized to incorporate the following:

First name: Step 1 FName

Last name: Step 1 LName

Access token: Step 1 Token

Test the app here  
<https://zapier.com/app/editor/1111111/nodes/1111111/sample>

Dashboard → Test this Step

YOUR ZAP IS OFF

Assign Access Token to MailChimp Subscriber

1. New Subscriber

MailChimp

New Subscriber

IASOC MailChimp Account

Edit Options

Test this Step

2. Assign Access Token To N...

Manage IASOC Access Tokens

Assign Access Token To New S...

Edit Template

Test this Step

Delete

Test Manage IASOC Access Tokens

Test Successful!

Re-test Manage IASOC Access Tokens

Add a step or Finish

Get Help

Response Time: ~2h | M-F 9am-5pm PST