Lesson 03 Demo 01

Setting Up a Zapier Account and Creating a Zap

Objective: To demonstrate how to set up a Zapier account and create a Zap

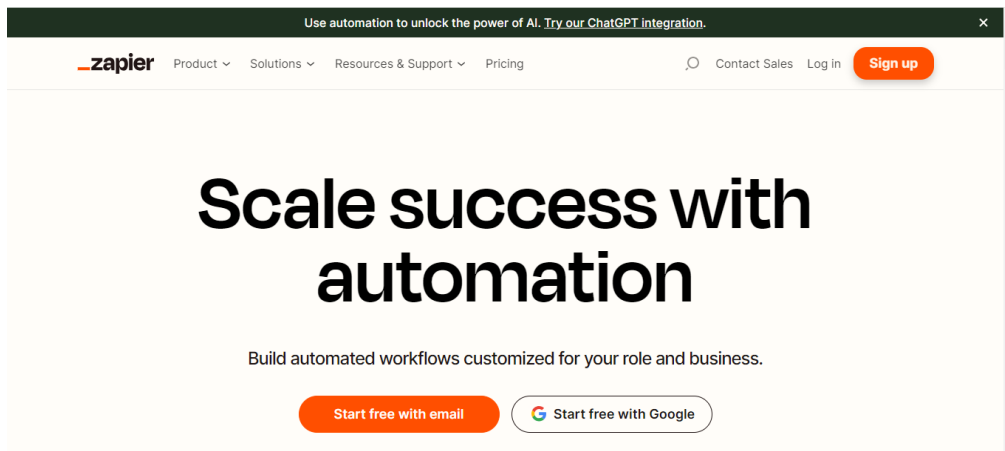**Tools required:** Zapier

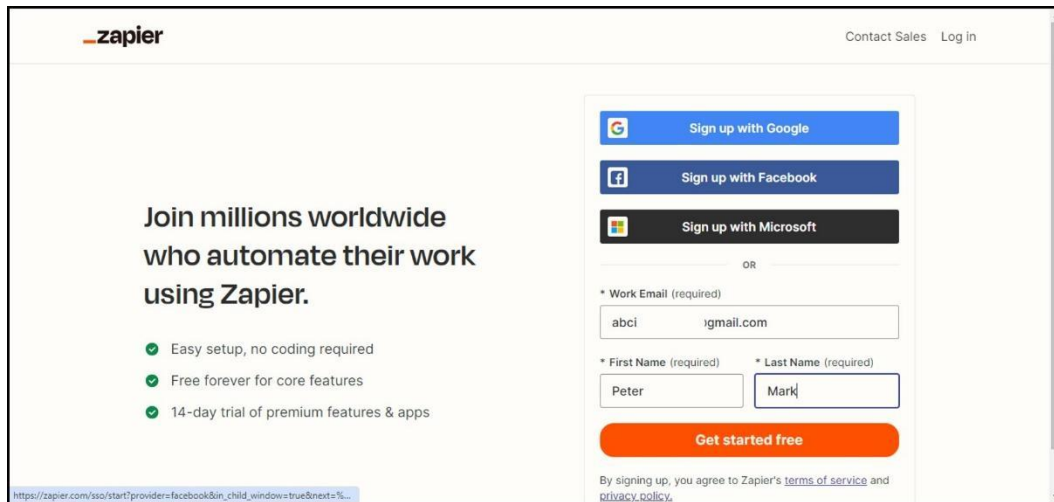**Prerequisites:** None

Steps to be followed:
1. Set up a Zapier account
2. Create a Zap

Step 1: Set up a Zapier account

1.1 Go to Zapier.com and click on **Sign up**

1.2 Enter the credentials

1.3 Enter the **Password**

1.4 Click on **Log in** next to the **Sign up** button
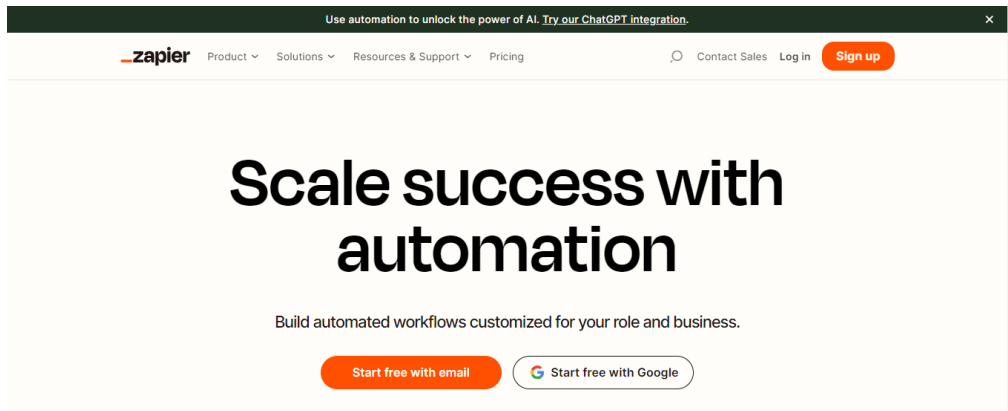
1.5 Enter the **Email** and **Password** and click on **Continue**
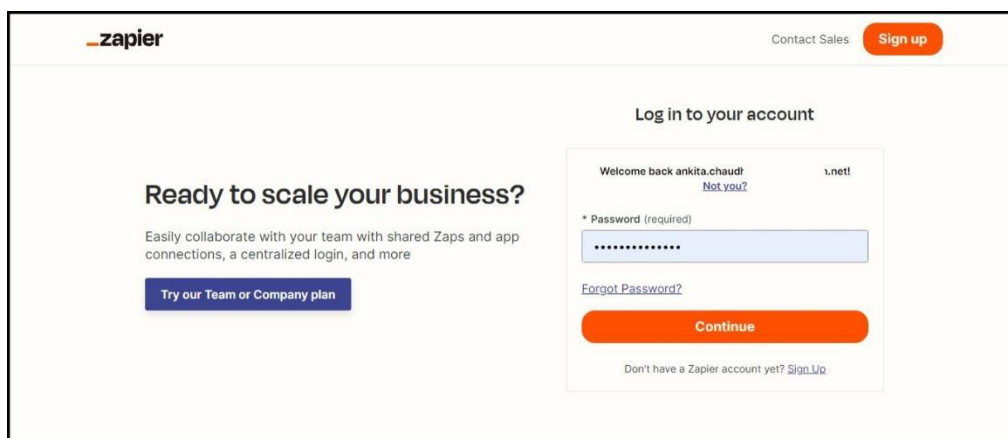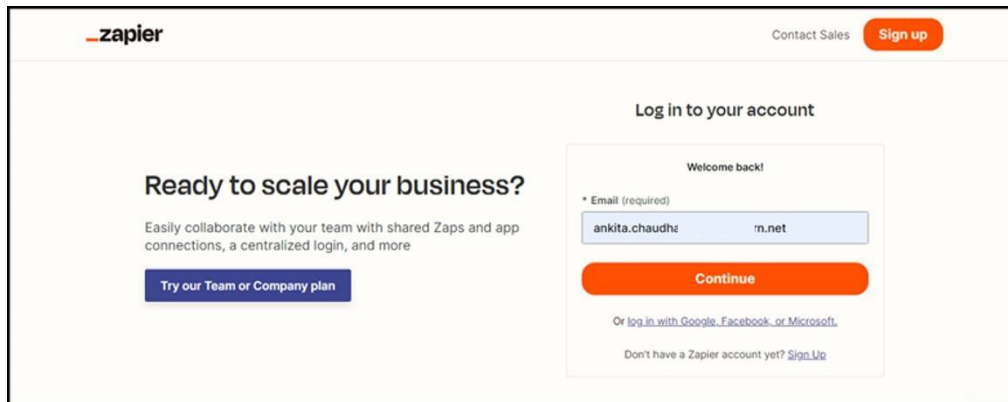
1.6 Choose your user role
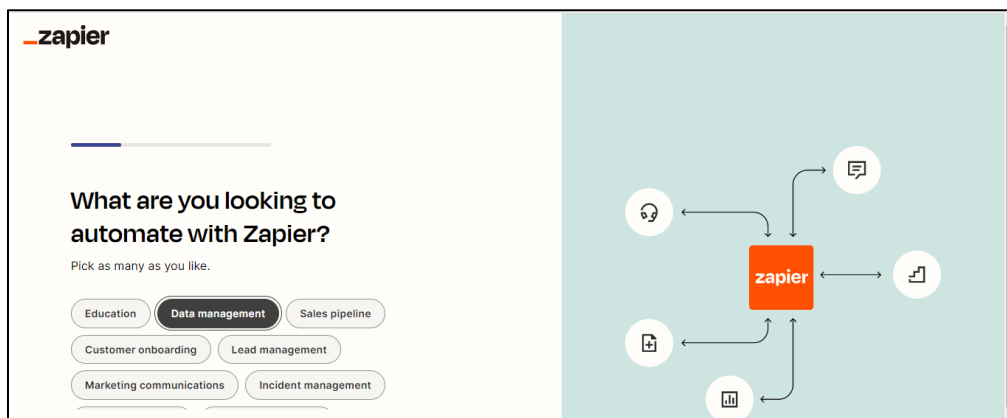
1.7 Select the option that needs to be automated with Zapier

1.8 Select the apps you want to use

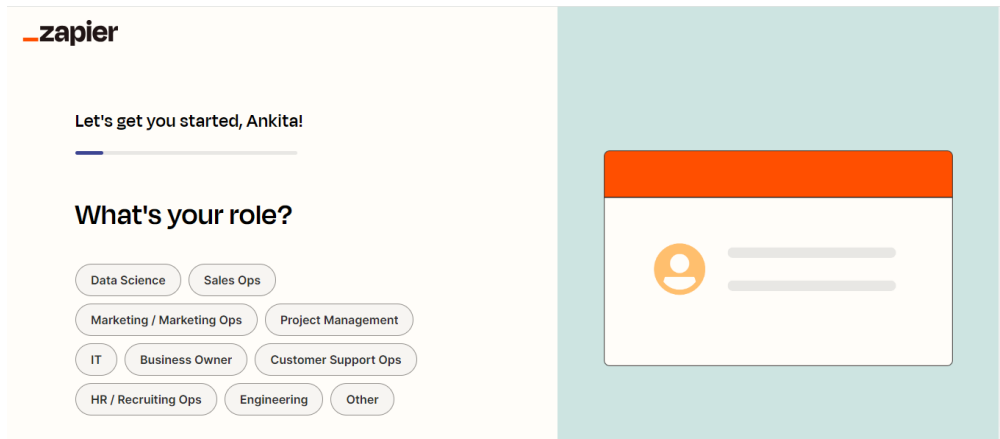

1.9 Choose the option that best reflects how familiar you are with automation

1.10 Select the company size

1.11 Select the job level

1.12 Select who will be using Zapier; in this case, select the **Just me** option
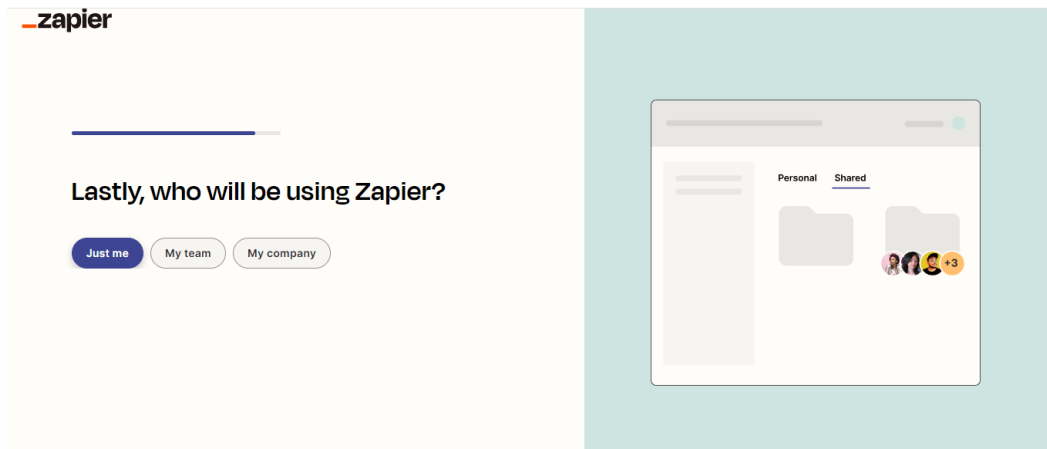
Step 2: Create a Zap

2.1 Navigate to the Zapier dashboard and click on **+ Create Zap**
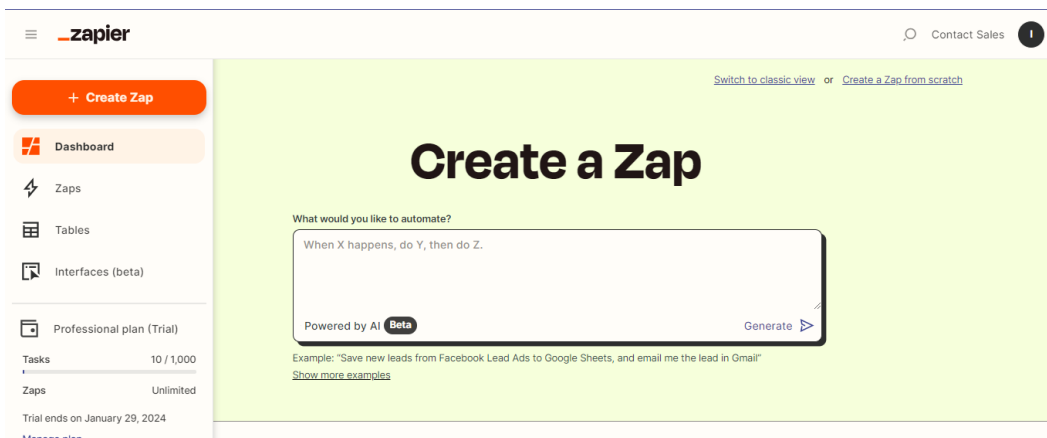
2.2 Click on **Trigger**
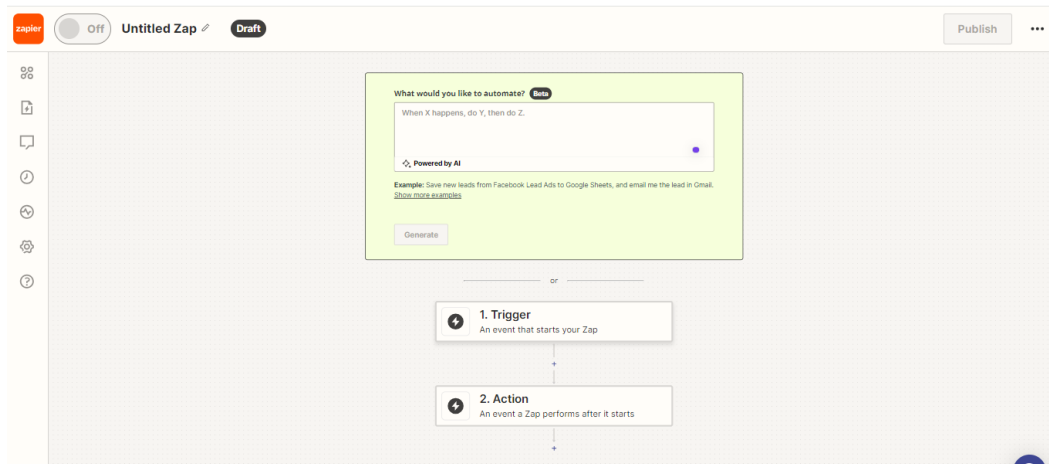
2.3 In the **Change trigger** page, search for and select **Google Sheets** in the search bar
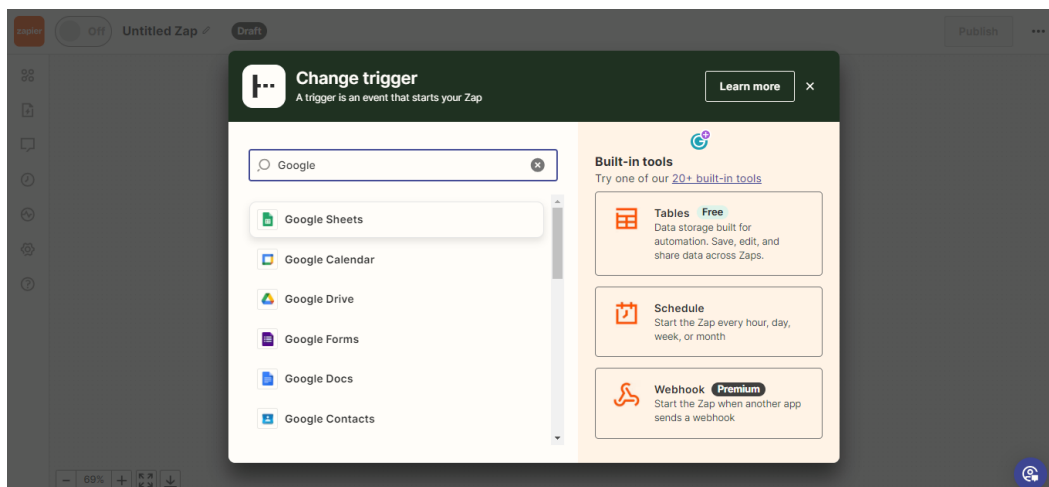
2.4 Under **Event** on the right panel, search and select **New Spreadsheet Row**

2.5 Click on **Account** and then select the Google account
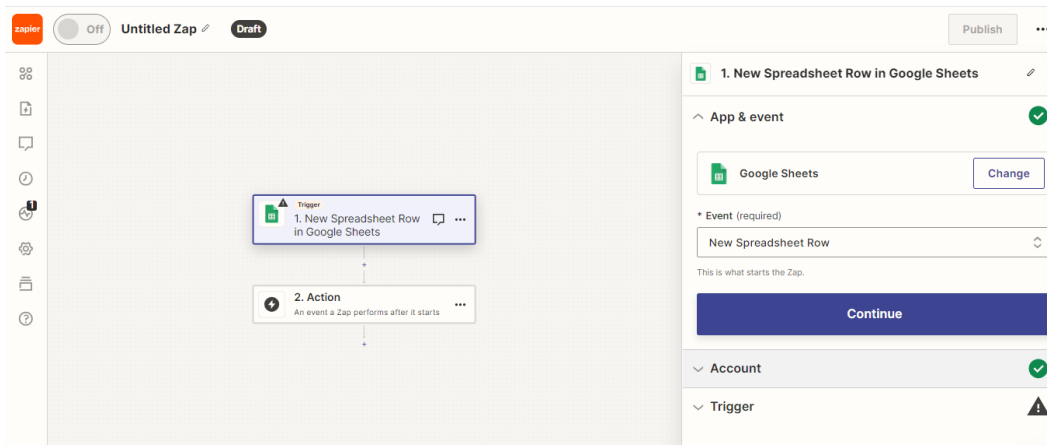
2.6 Before selecting the next step, go to your Google Drive and make a spreadsheet with the name **Lead data_sample**
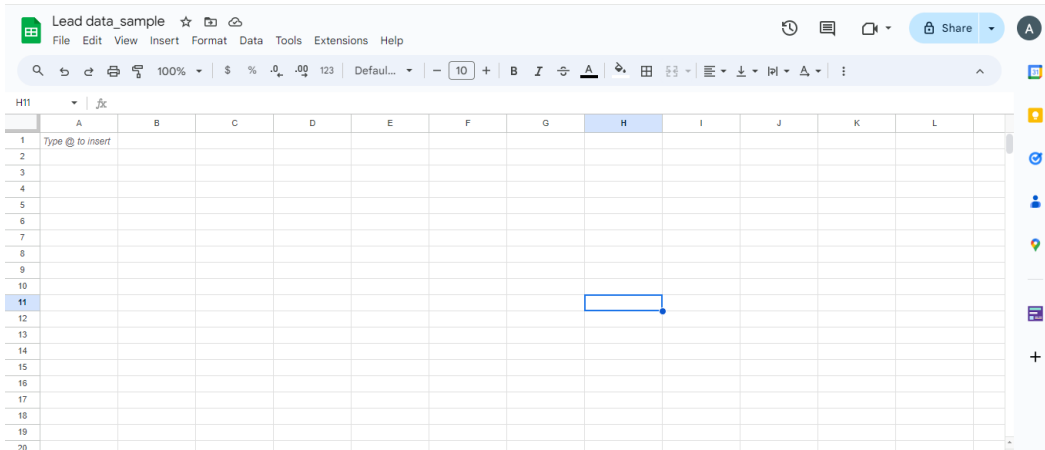
2.7 Once your account is connected, select **Continue**

2.8 Under **Spreadsheet**, select **Lead data_sample**

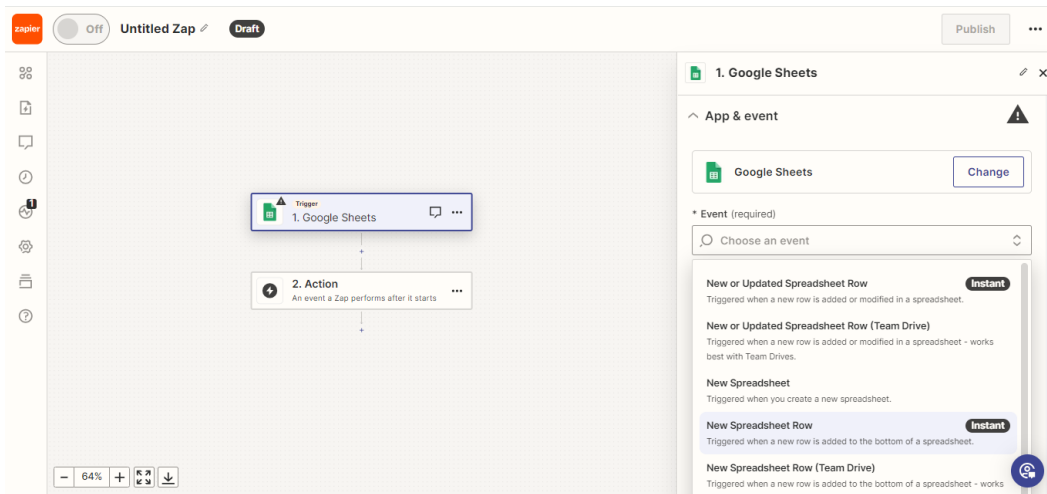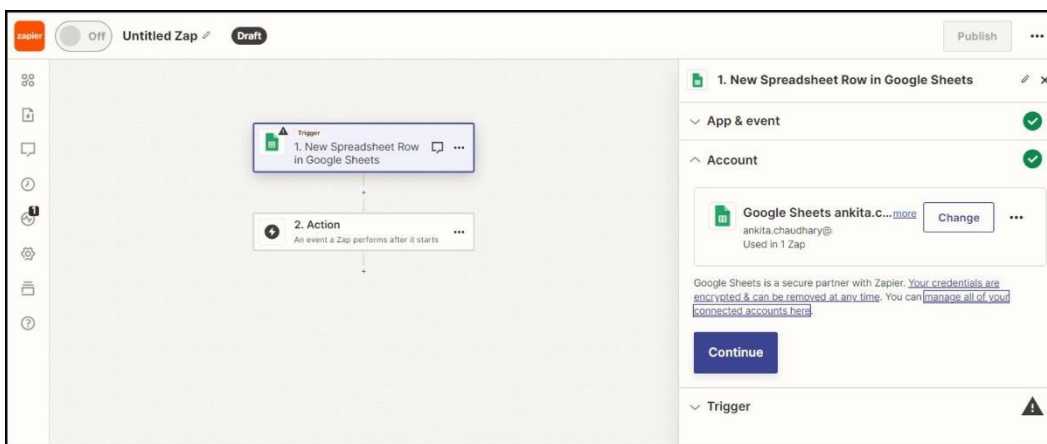This shall appear automatically, as your Google Sheets is linked to your Google Drive account.

In **Worksheet,** select **Sheet 1.**

2.9 Fill up a sample data in the spreadsheet, **Lead data_sample**

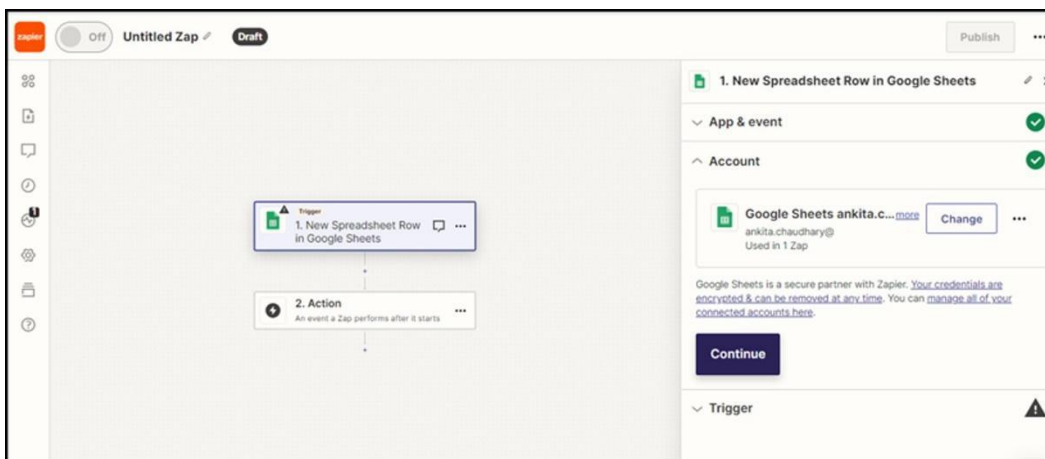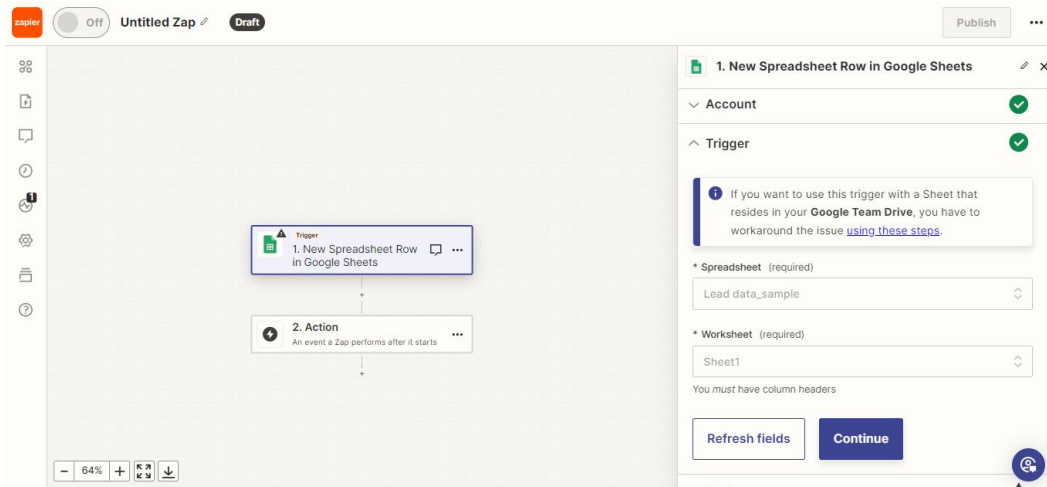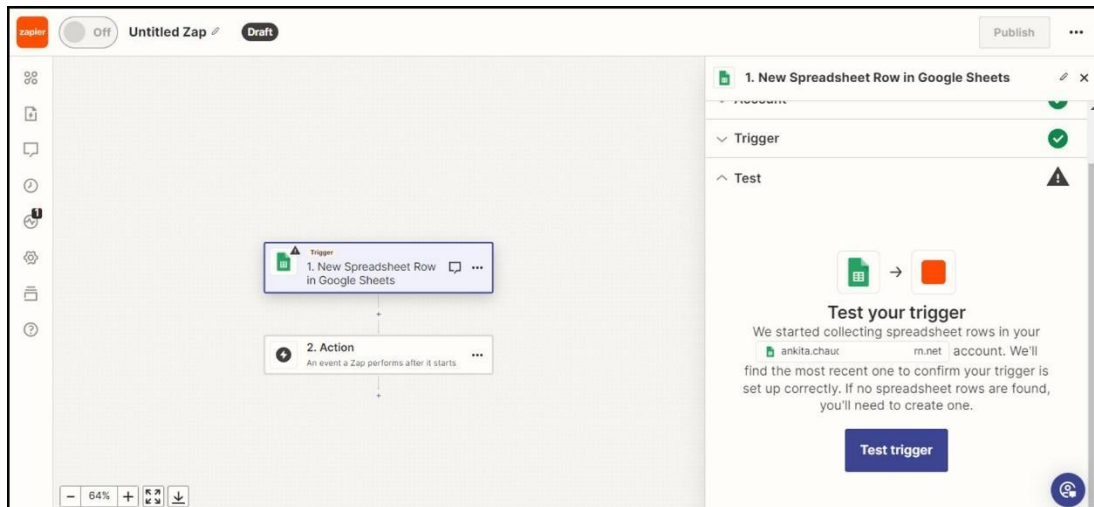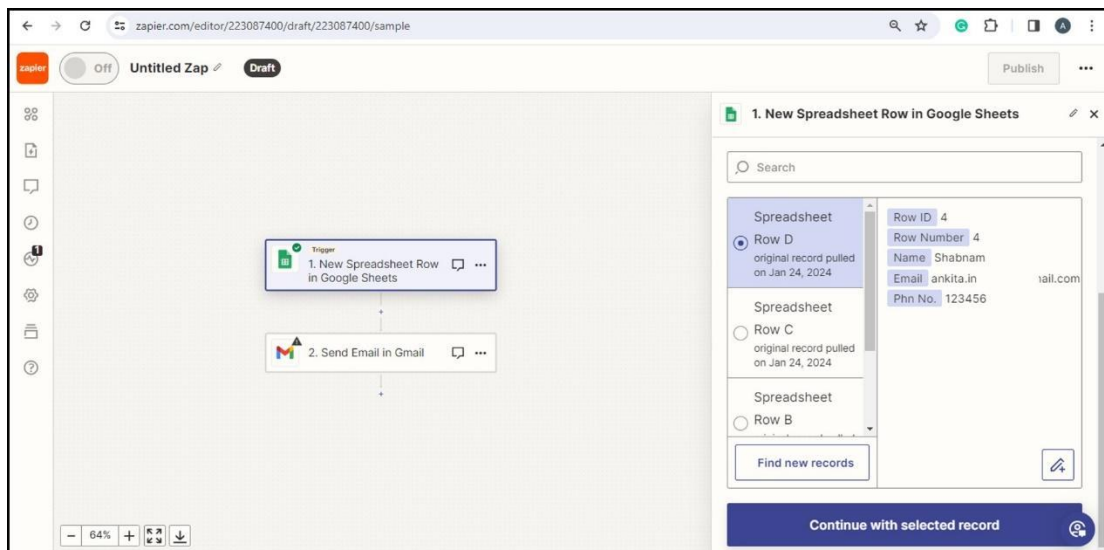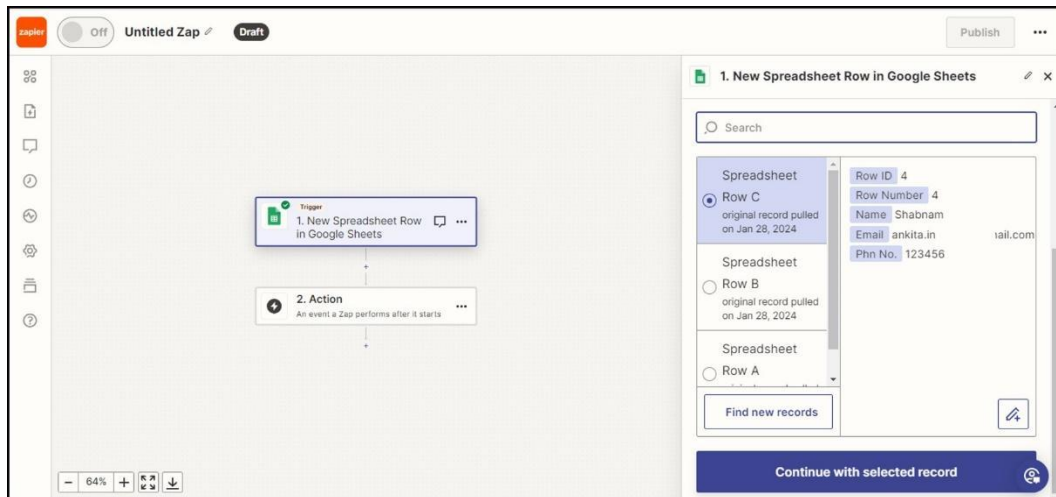2.10 Click the **Test trigger** button to show the row data on Zapier
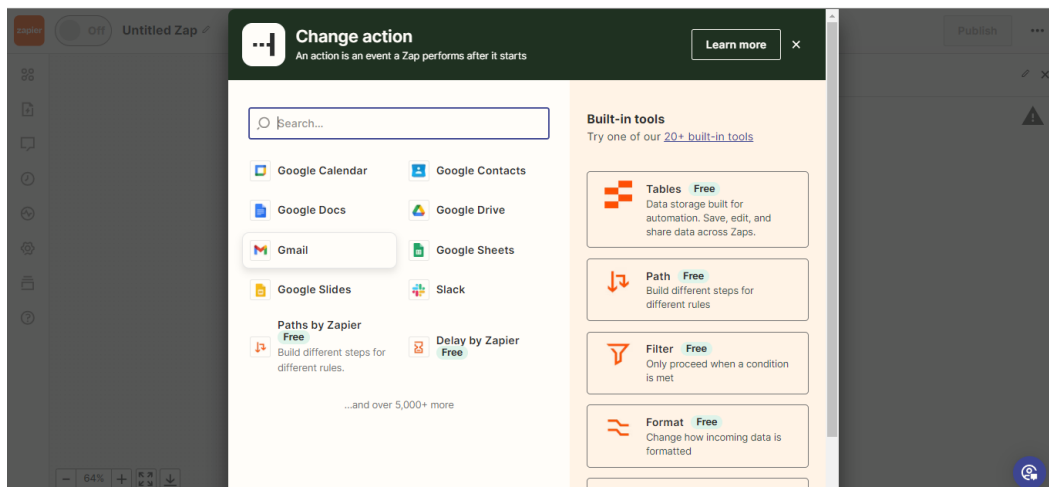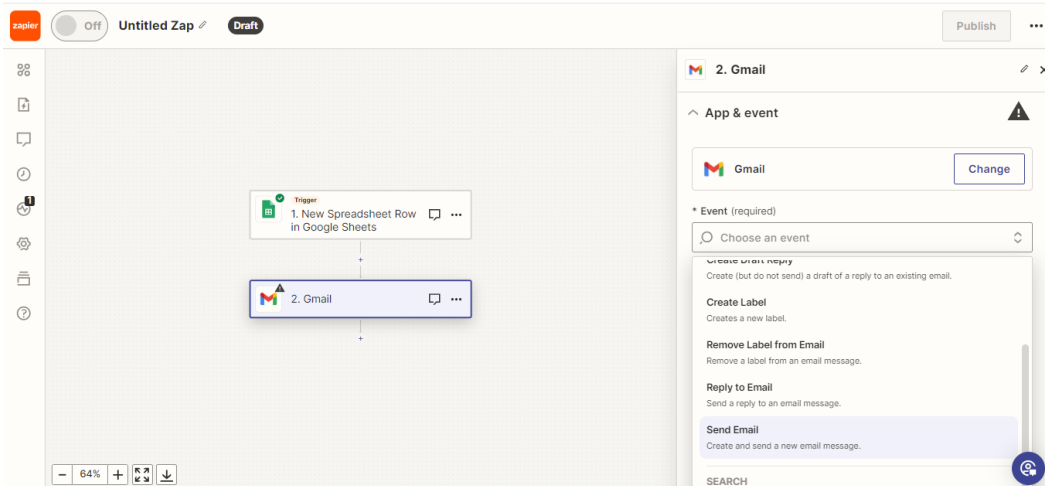
The following screen will appear:
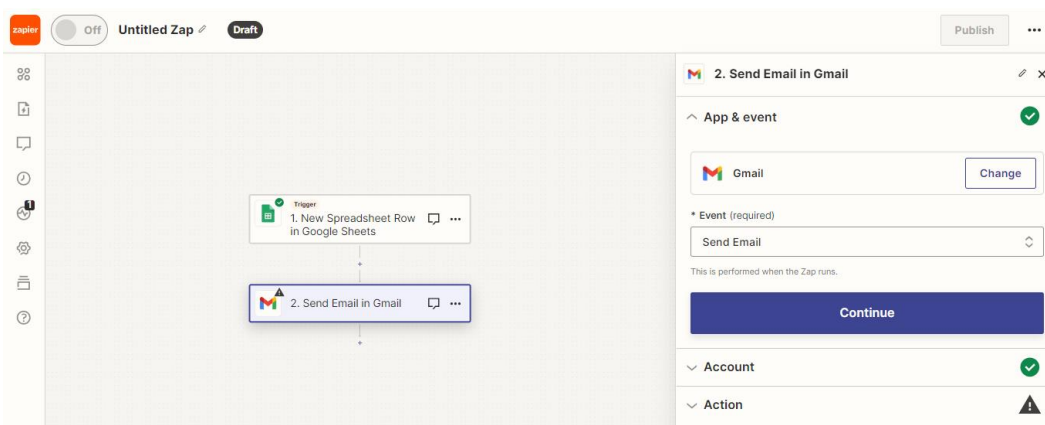

2.11 Click on **Action**

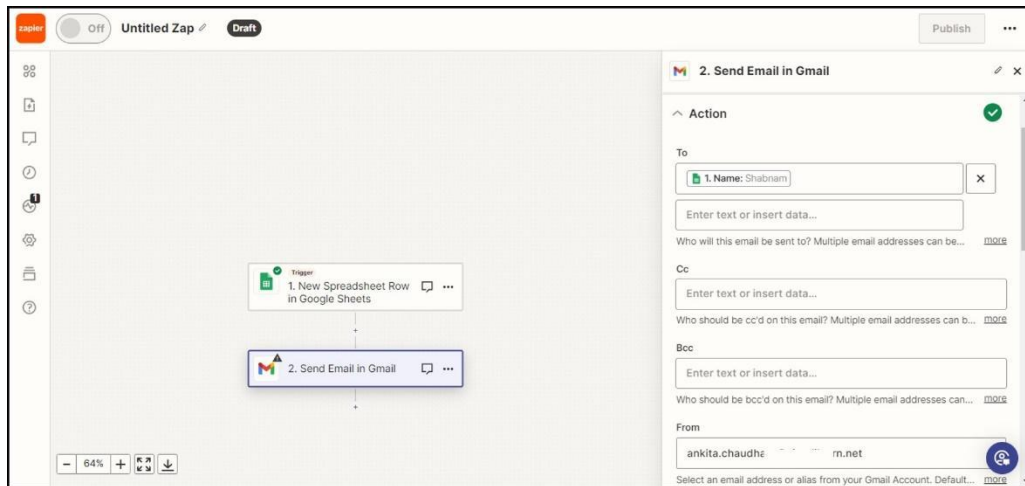2.12 In the **Change action** page, search and select **Gmail**

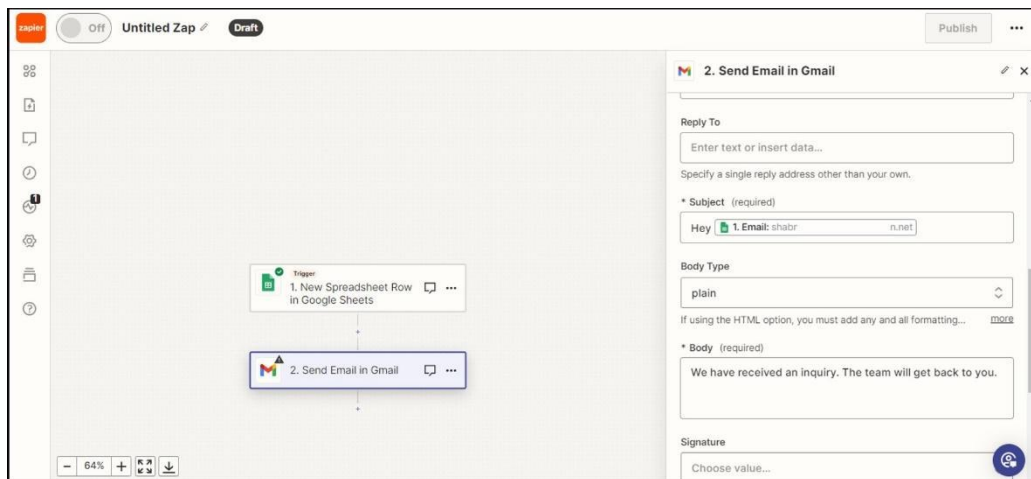2.13 Under **Event,** search and select **Send Email**
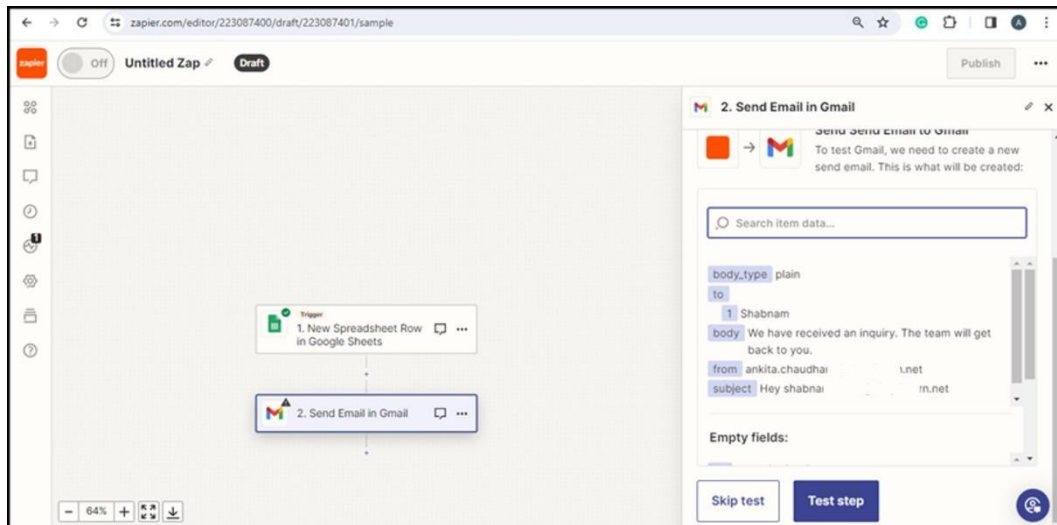
2.14 Click on **Continue**

2.15 In the **To** section, select data from the sheet named **Lead data_sample**, which has an email ID stored
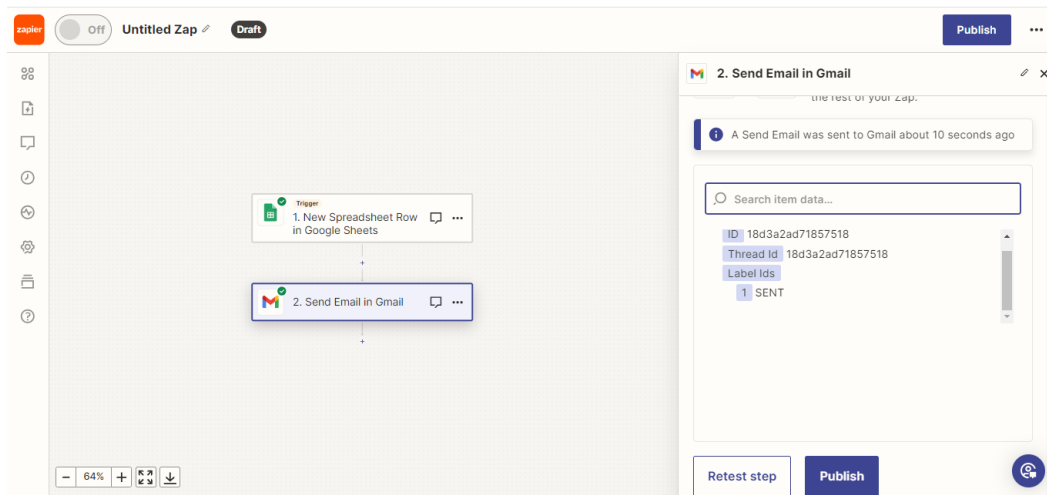
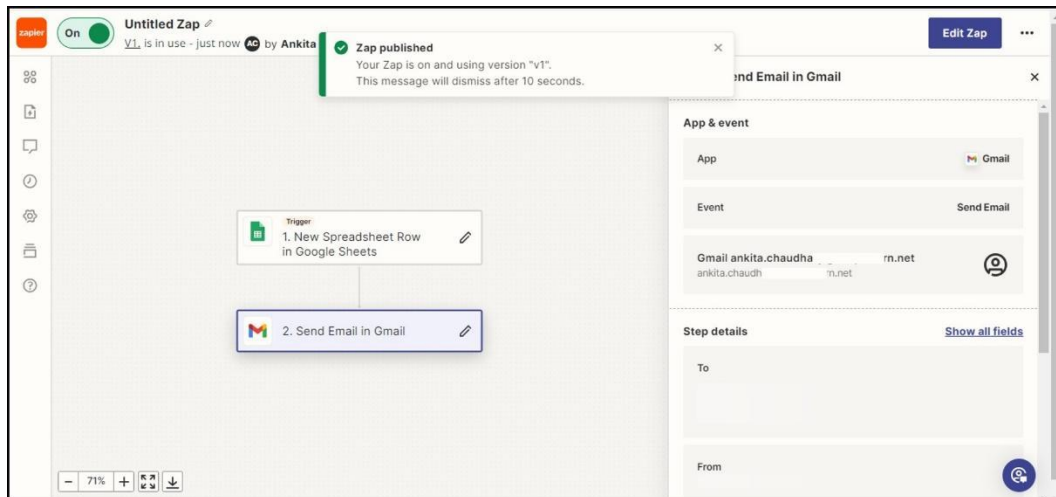2.16 Select further action fields that you want to automate as shown below

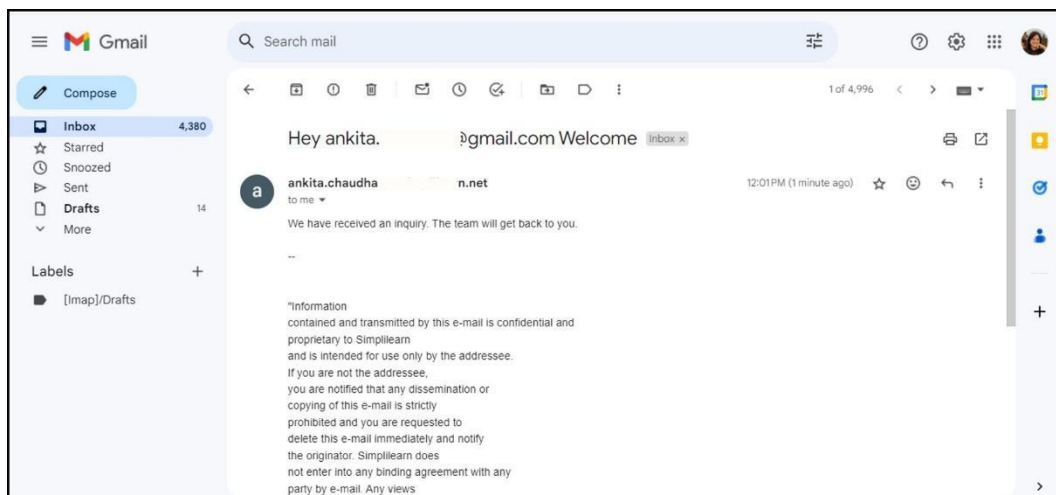2.17 Verify the data and click on the **Test step**

2.18 Zapier will act, and an email will be sent to the lead who has filled the form; click on **Publish**

The following screen will appear:

The email sent is shown below:

You will receive an email for creating your first Zap from Zapier.com as shown below:

By following these steps, you have successfully set up a Zapier account and created a Zap.