

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

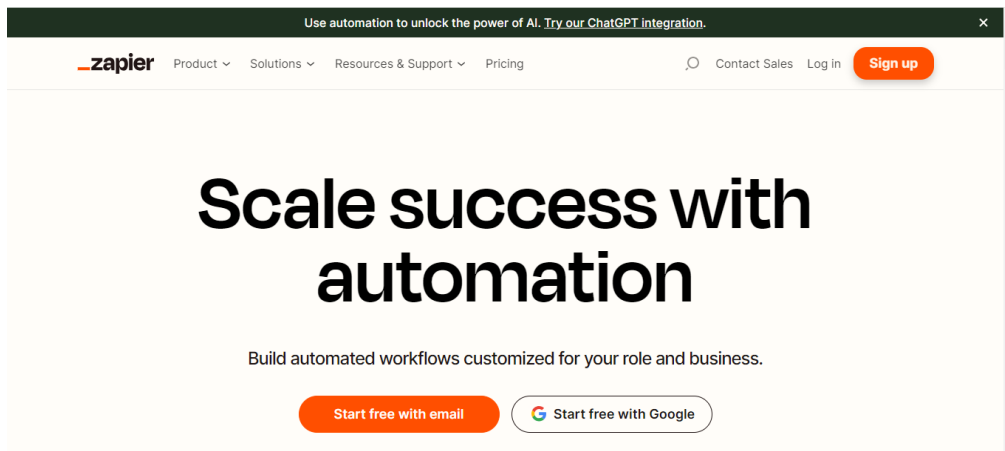
Prerequisites: None

Steps to be followed:

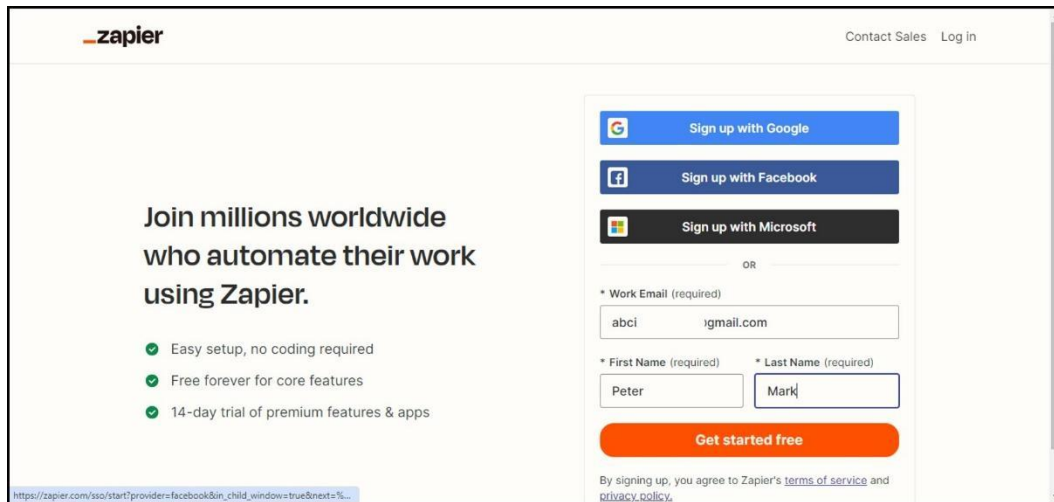
1. Set up a Zapier account
2. Create a Zap

Step 1: Set up a Zapier account

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



1.2 Enter the credentials



The image shows the Zapier sign-up page. On the left, there is a heading "Join millions worldwide who automate their work using Zapier." followed by three bullet points: "Easy setup, no coding required", "Free forever for core features", and "14-day trial of premium features & apps". On the right, there are three social login buttons: "Sign up with Google", "Sign up with Facebook", and "Sign up with Microsoft". Below these is an "OR" separator. The main form has a label "* Work Email (required)" with a text input containing "abc@gmail.com". Below that are two input fields for "* First Name (required)" with "Peter" and "* Last Name (required)" with "Mark". A large orange button labeled "Get started free" is below the form. At the bottom, a small text line says "By signing up, you agree to Zapier's [terms of service](#) and [privacy policy](#)."

zapier Contact Sales Log in

Join millions worldwide who automate their work using Zapier.

- ✓ Easy setup, no coding required
- ✓ Free forever for core features
- ✓ 14-day trial of premium features & apps

Sign up with Google

Sign up with Facebook

Sign up with Microsoft

OR

* Work Email (required)

abc@gmail.com

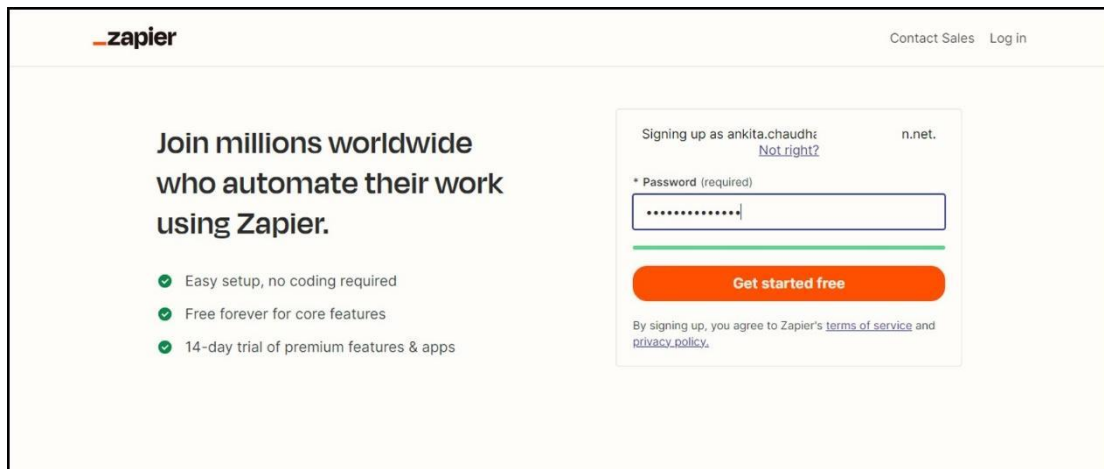
* First Name (required) * Last Name (required)

Peter Mark

Get started free

By signing up, you agree to Zapier's [terms of service](#) and [privacy policy](#).

1.3 Enter the Password



The image shows the Zapier sign-up page at the password entry step. The heading and bullet points are the same as in the previous image. The social login buttons are still present. The main form now shows "Signing up as ankita.chaudhary@gmail.com" with a link "Not right?". Below this is a label "* Password (required)" and a password input field filled with dots. A large orange button labeled "Get started free" is below the form. At the bottom, the same text line about terms of service and privacy policy is present.

zapier Contact Sales Log in

Join millions worldwide who automate their work using Zapier.

- ✓ Easy setup, no coding required
- ✓ Free forever for core features
- ✓ 14-day trial of premium features & apps

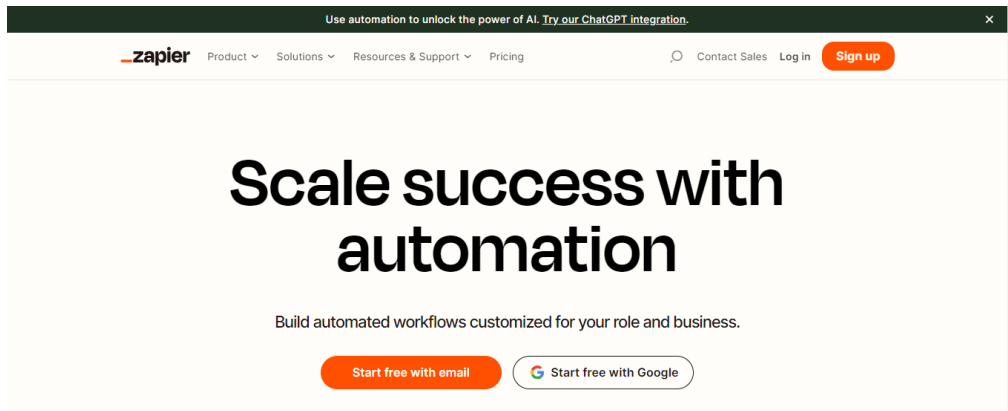
Signing up as ankita.chaudhary@gmail.com [Not right?](#)

* Password (required)

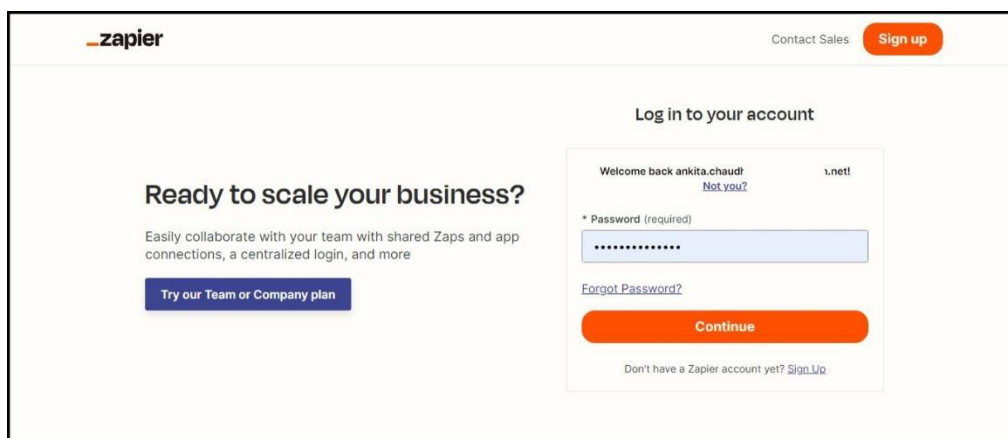
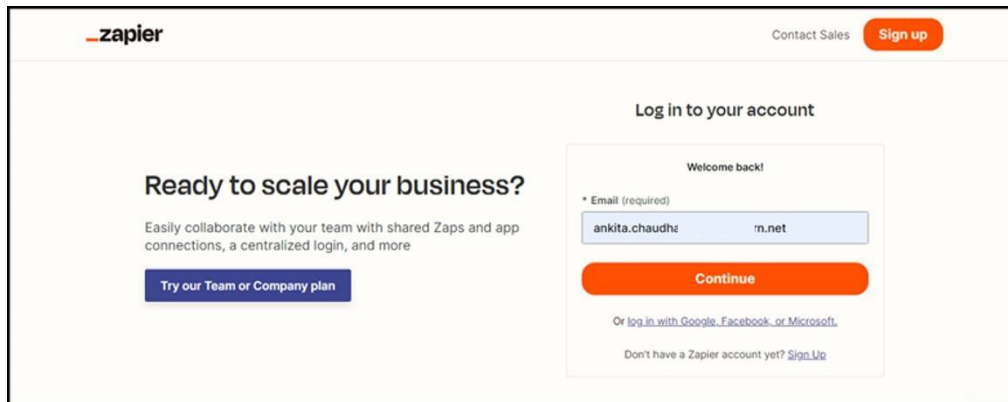
Get started free

By signing up, you agree to Zapier's [terms of service](#) and [privacy policy](#).

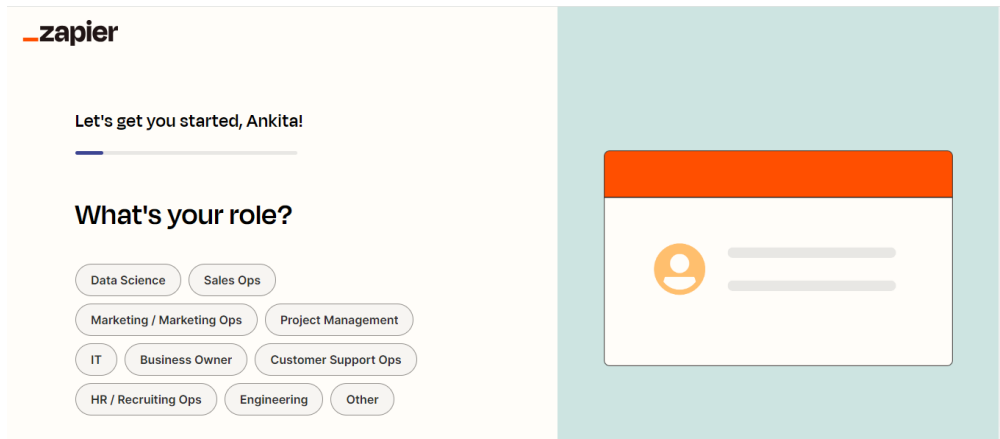
1.4 Click on **Log in** next to the **Sign up** button



1.5 Enter the **Email** and **Password** and click on **Continue**



1.6 Choose your user role



zapier

Let's get you started, Ankita!

What's your role?

Data Science Sales Ops

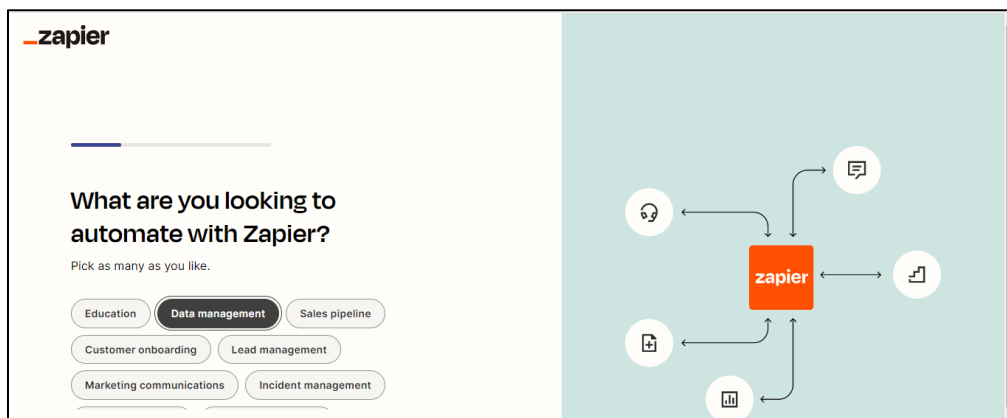
Marketing / Marketing Ops Project Management

IT Business Owner Customer Support Ops

HR / Recruiting Ops Engineering Other

The right side of the screen shows a light blue background with a white rectangular box containing an orange circle icon with a person silhouette and two horizontal lines for text input.

1.7 Select the option that needs to be automated with Zapier



zapier

What are you looking to automate with Zapier?

Pick as many as you like.

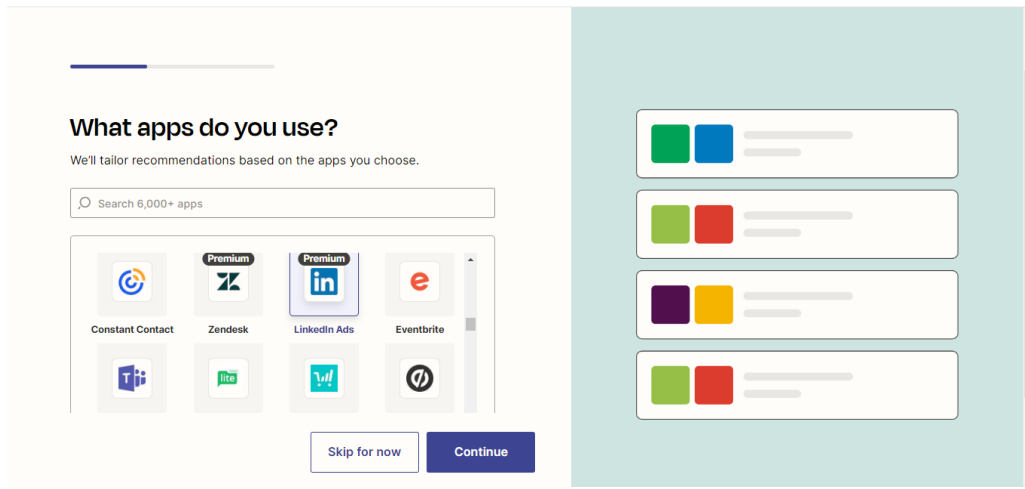
Education **Data management** Sales pipeline

Customer onboarding Lead management

Marketing communications Incident management

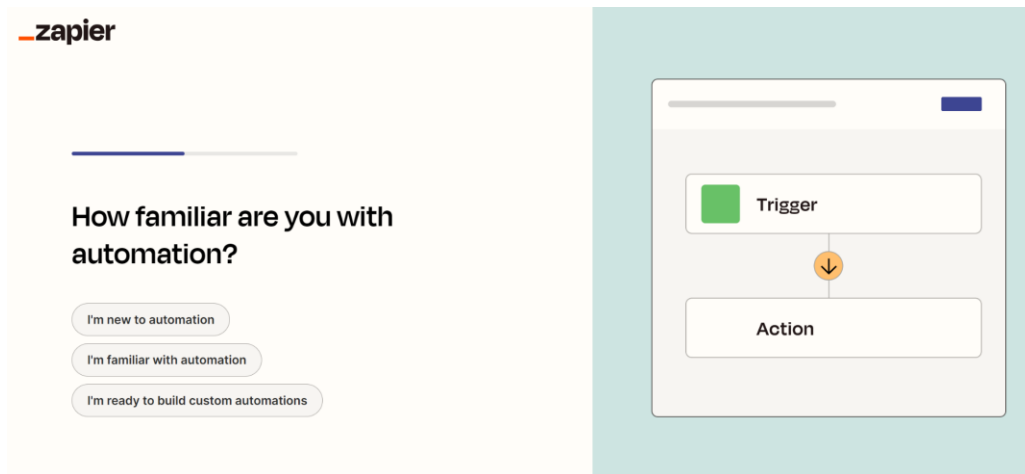
The right side of the screen shows a light blue background with a central orange square icon labeled 'zapier'. Six circular icons are arranged around it, each with an arrow pointing towards the central 'zapier' icon: a headset (top left), a speech bubble (top right), a bar chart (middle right), a document with a plus sign (bottom right), a document with a checkmark (bottom left), and a gear (middle left).

1.8 Select the apps you want to use



The interface for selecting apps on Zapier. It features a search bar at the top with the text "Search 6,000+ apps". Below the search bar is a grid of app icons, including Constant Contact, Zendesk, LinkedIn Ads (marked as Premium), Eventbrite, Microsoft Teams, and others. At the bottom of the grid are two buttons: "Skip for now" and "Continue". To the right of the app selection area is a vertical list of four placeholder boxes, each containing two colored squares (green and blue, green and red, purple and yellow, green and red) and a horizontal line, representing the visual representation of the selected apps in a Zap.

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



The interface for selecting familiarity with automation on Zapier. It features the Zapier logo at the top left. Below the logo is a progress bar. The main heading is "How familiar are you with automation?". Below this heading are three radio button options: "I'm new to automation", "I'm familiar with automation", and "I'm ready to build custom automations". To the right of the familiarity selection area is a diagram showing a "Trigger" box connected to an "Action" box by a downward arrow, representing the basic structure of a Zap.

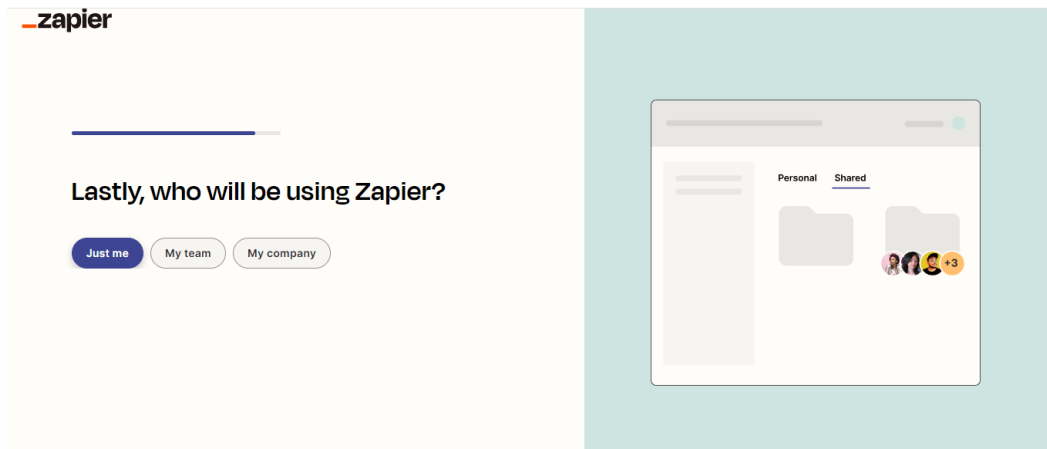
1.10 Select the company size

[illegible]

1.11 Select the job level

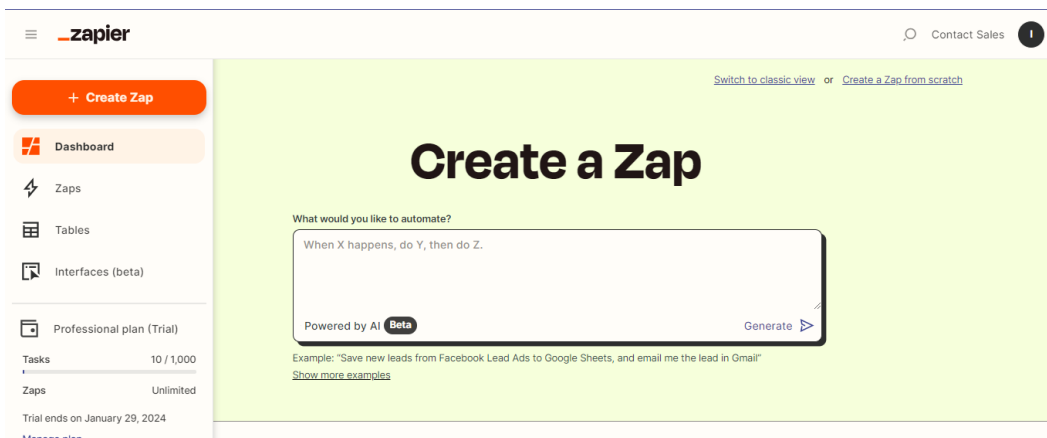
[illegible]

1.12 Select who will be using Zapier; in this case, select the **Just me** option

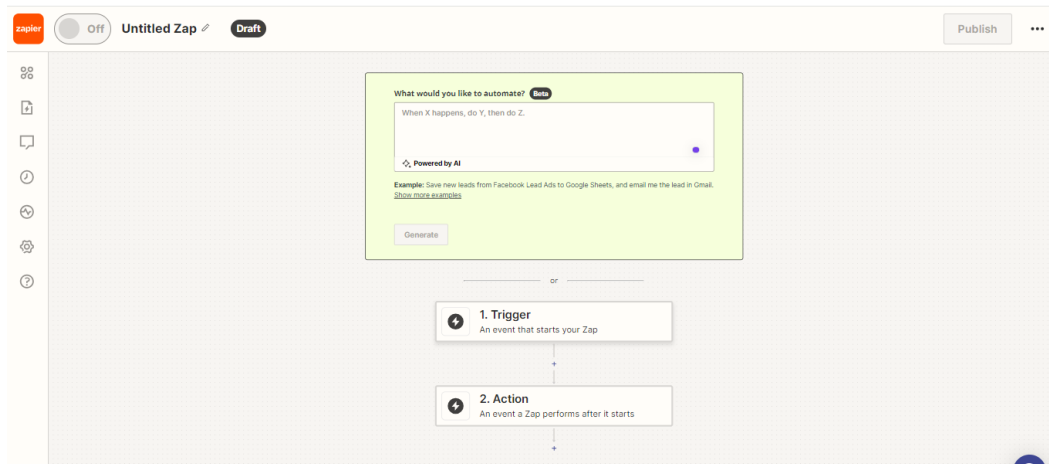


Step 2: Create a Zap

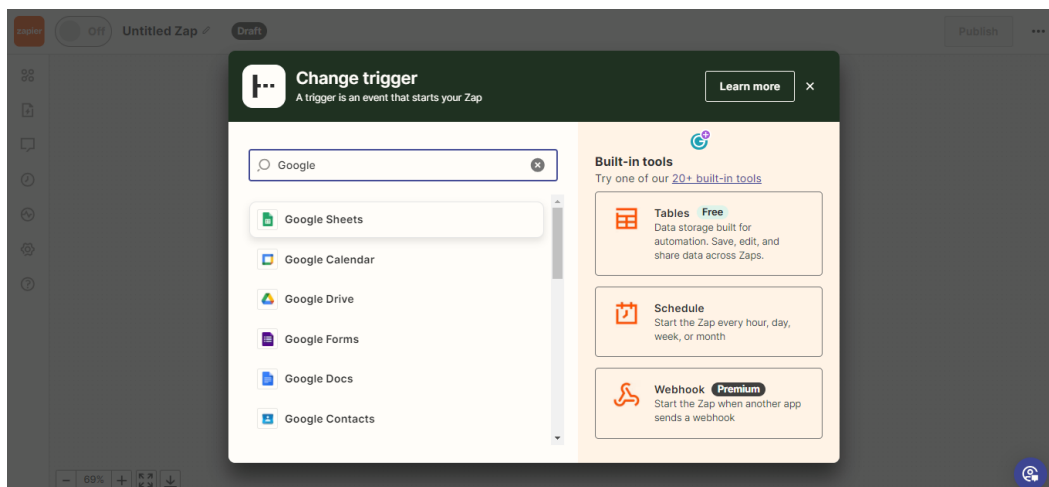
2.1 Navigate to the Zapier dashboard and click on **+ Create Zap**



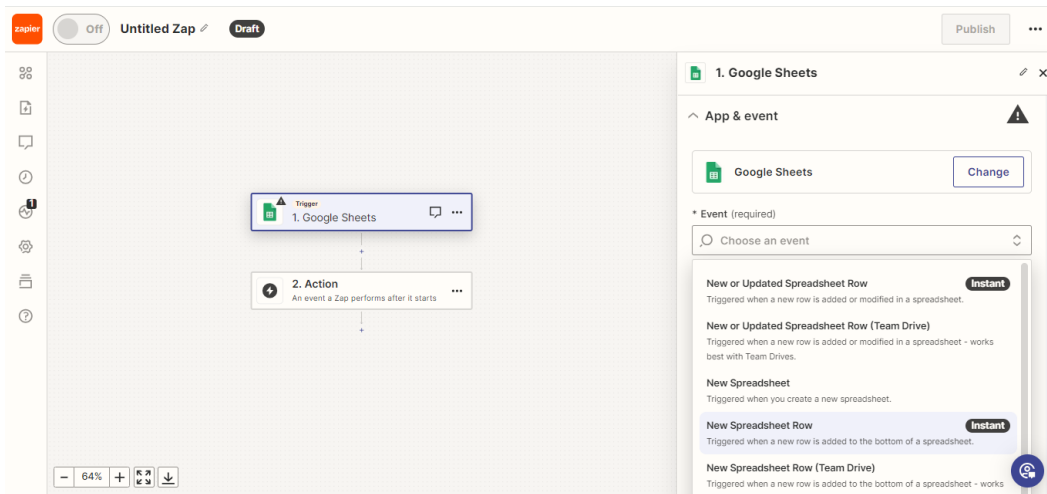
2.2 Click on **Trigger**



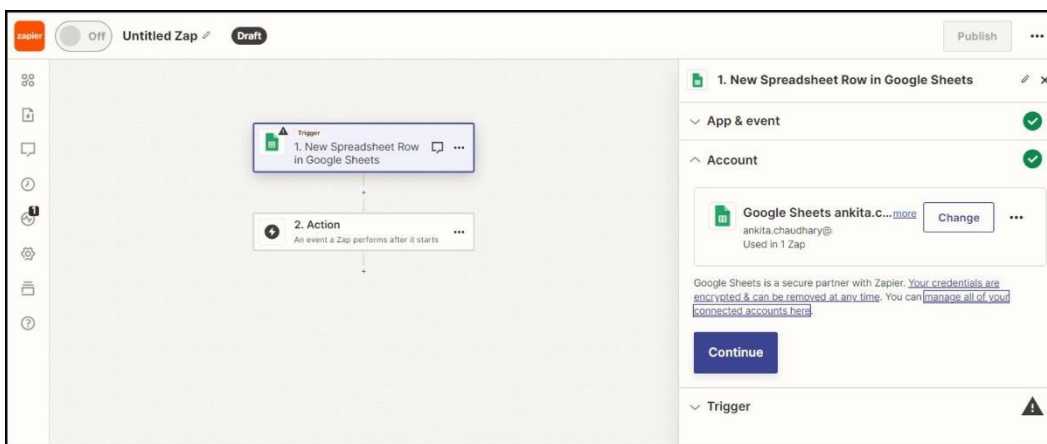
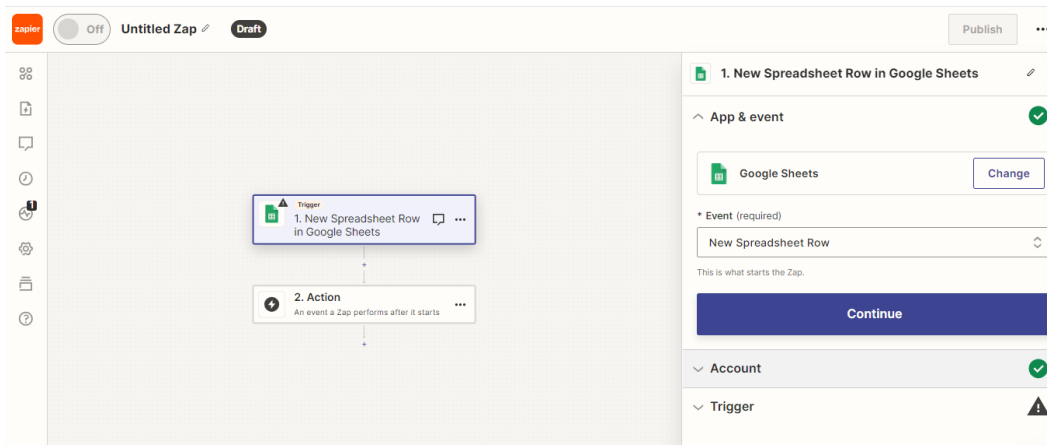
2.3 In the **Change trigger** page, search for and select **Google Sheets** in the search bar



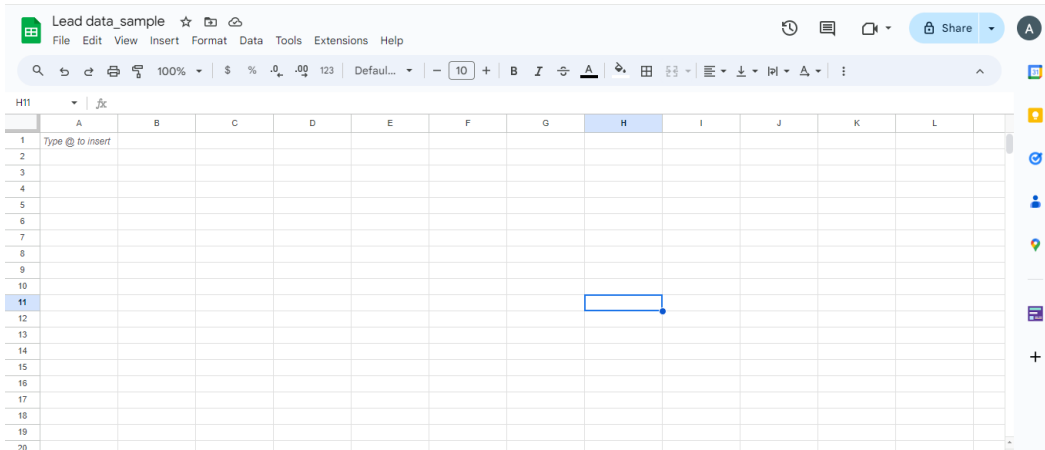
2.4 Under **Event** on the right panel, search and select **New Spreadsheet Row**



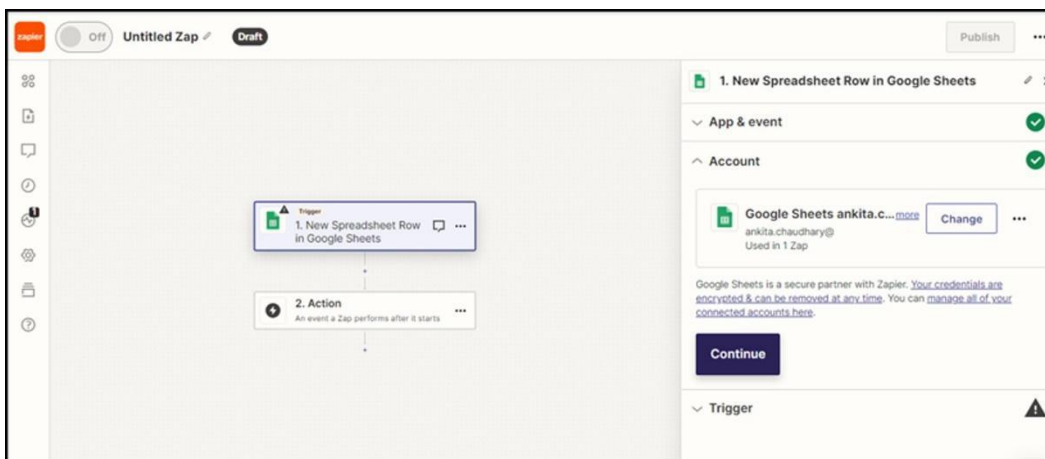
2.5 Click on **Account** and then select the Google account



2.6 Before selecting the next step, go to your Google Drive and make a spreadsheet with the name **Lead data_sample**



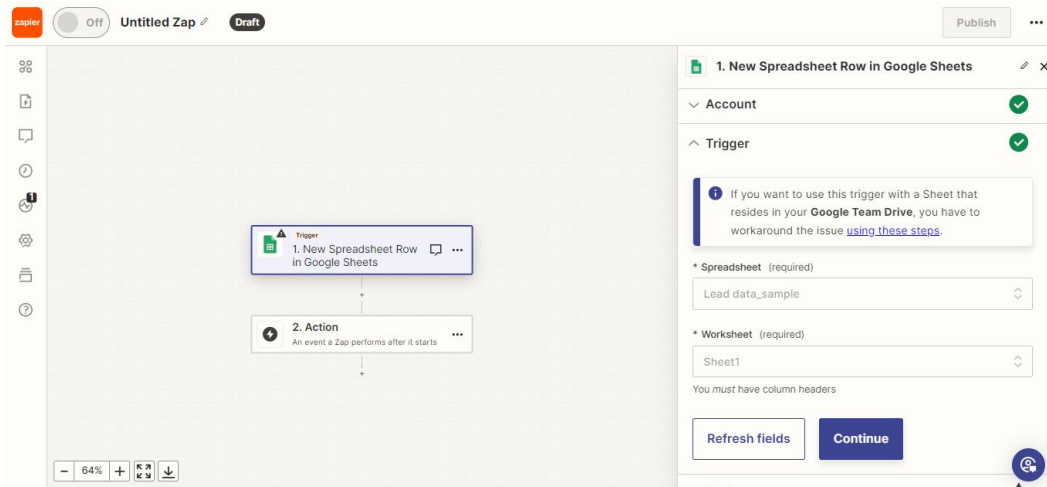
2.7 Once your account is connected, select **Continue**



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

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

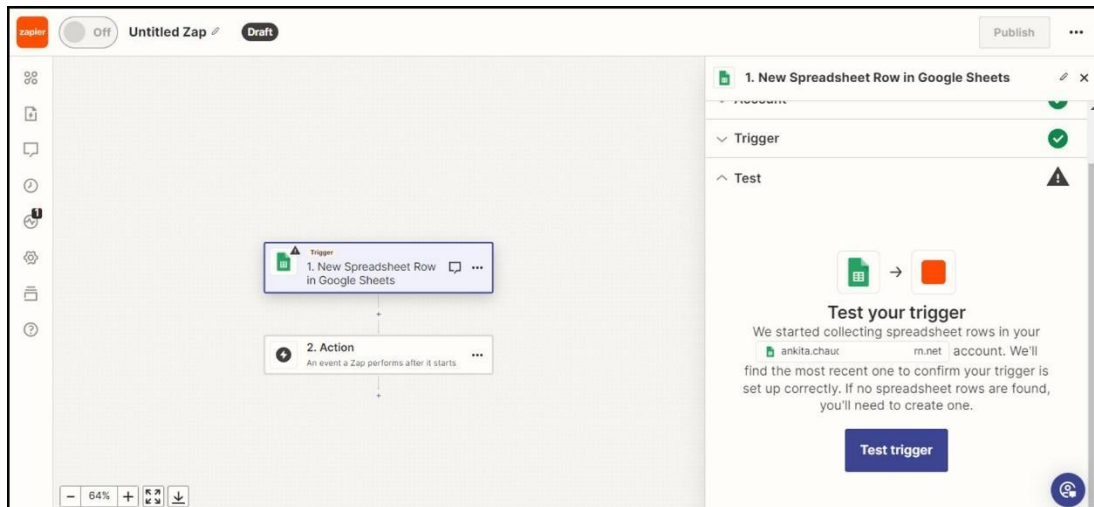
In **Worksheet**, select **Sheet 1**.



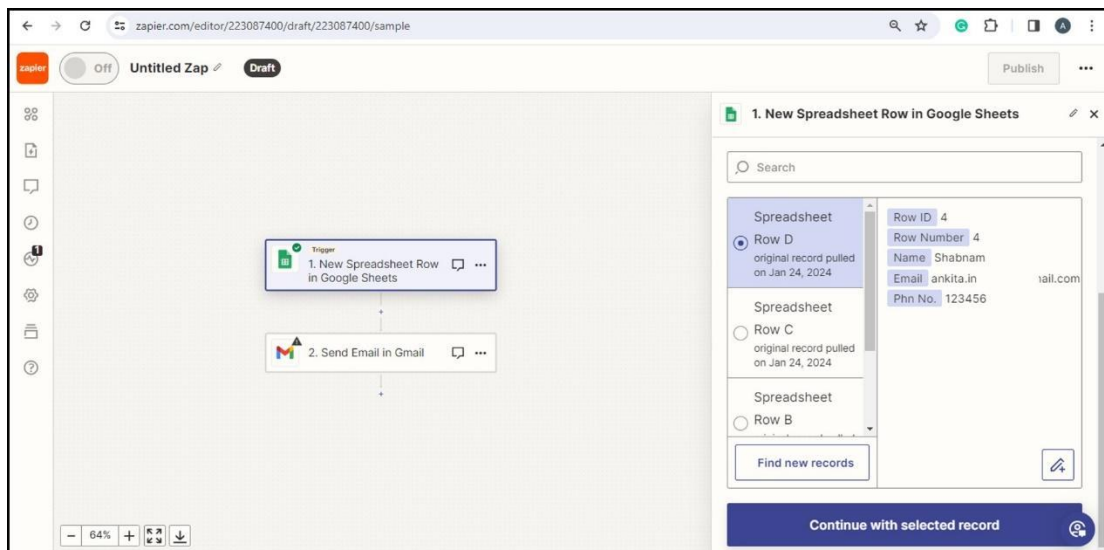
2.9 Fill up a sample data in the spreadsheet, **Lead data_sample**

	A	B	C	D	E	F
1	Name	Email	Phn No.			
2	Ankita	ankita.cha@arn.net	8989898989			
3	Tess	tess.math@n.net	99999999			
4	Shabnam	ankita.in@iil.com	123456			
5						
6						
7						
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10						
11						
12						
13						
14						

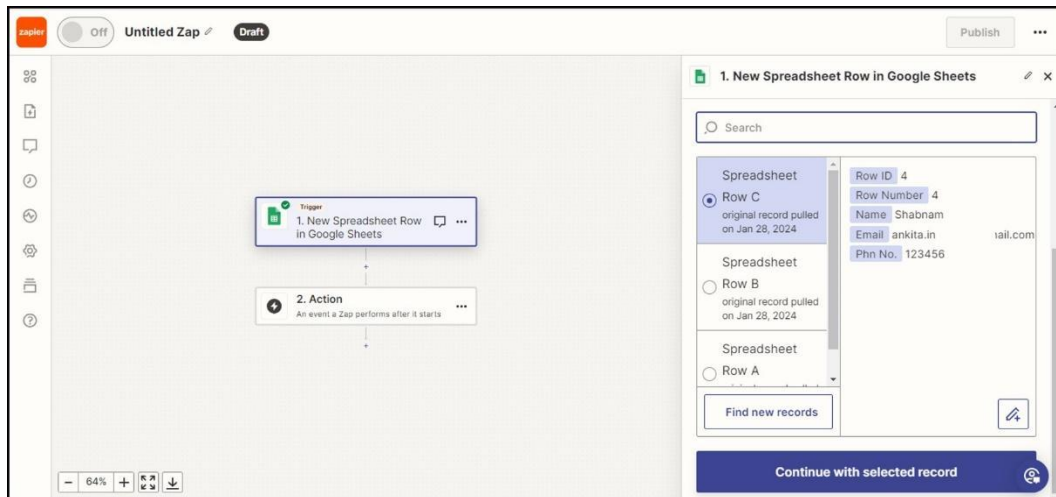
2.10 Click the **Test trigger** button to show the row data on Zapier



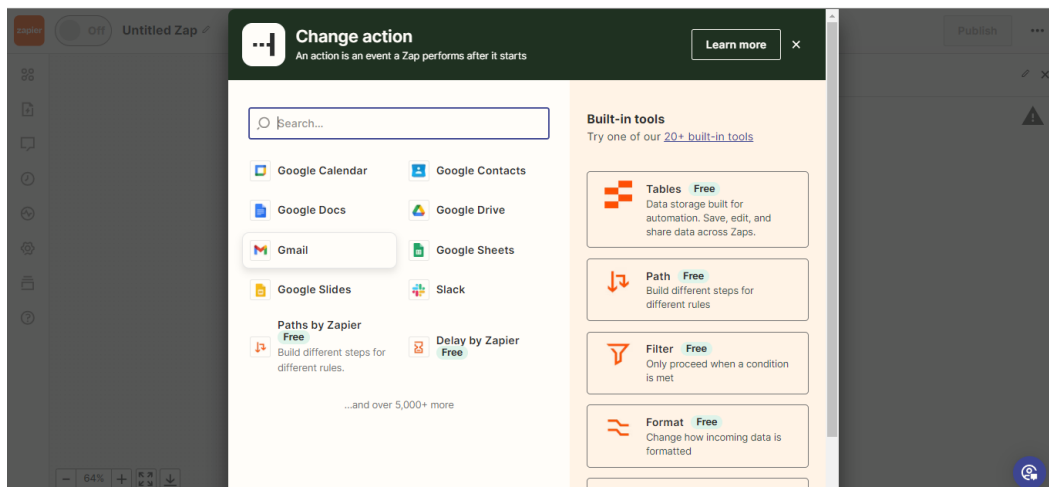
The following screen will appear:



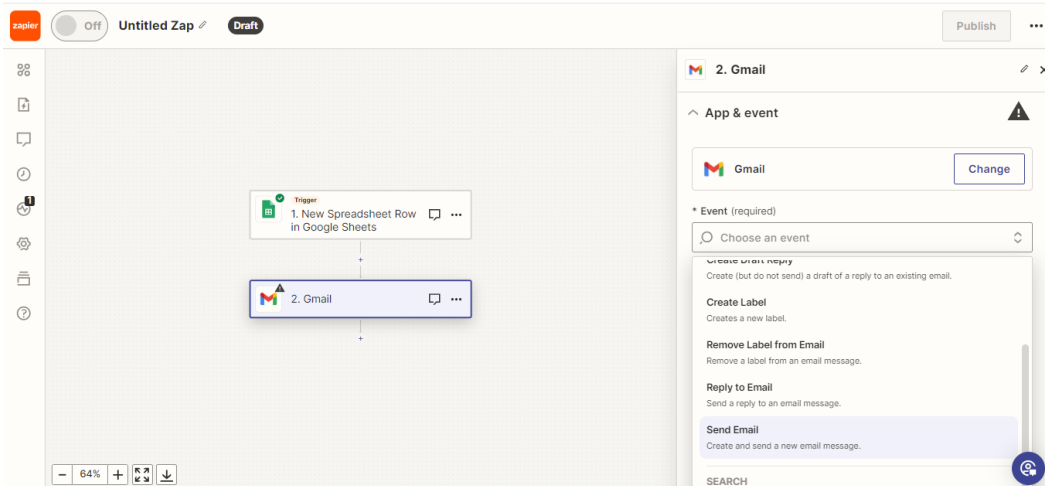
2.11 Click on **Action**



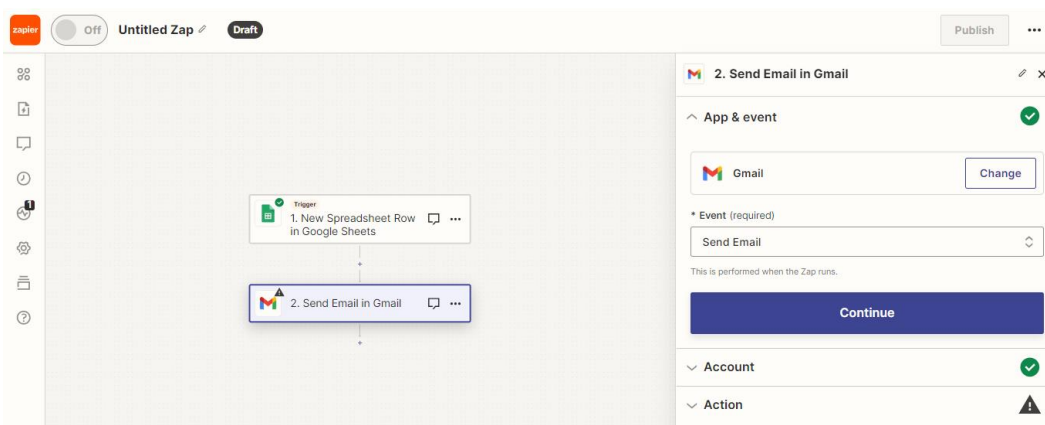
2.12 In the **Change action** page, search and select **Gmail**



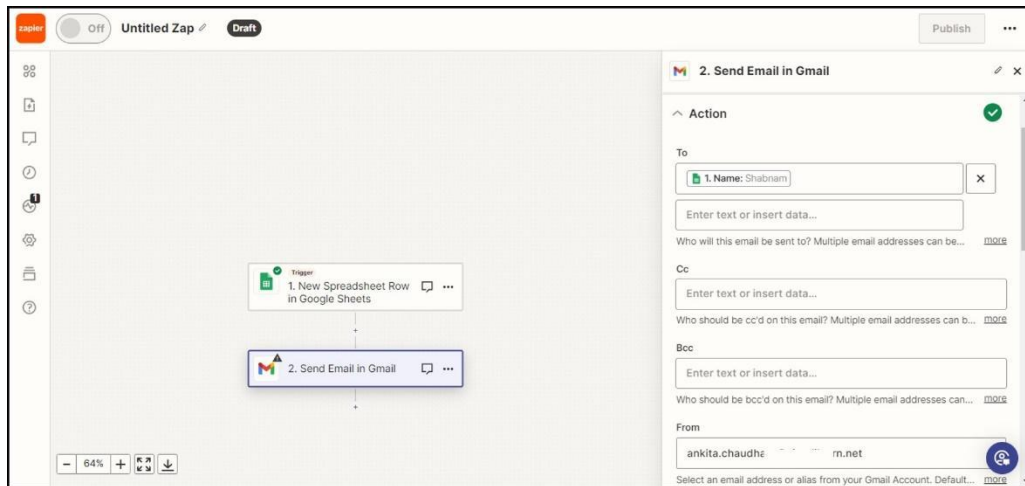
2.13 Under **Event**, search and select **Send Email**



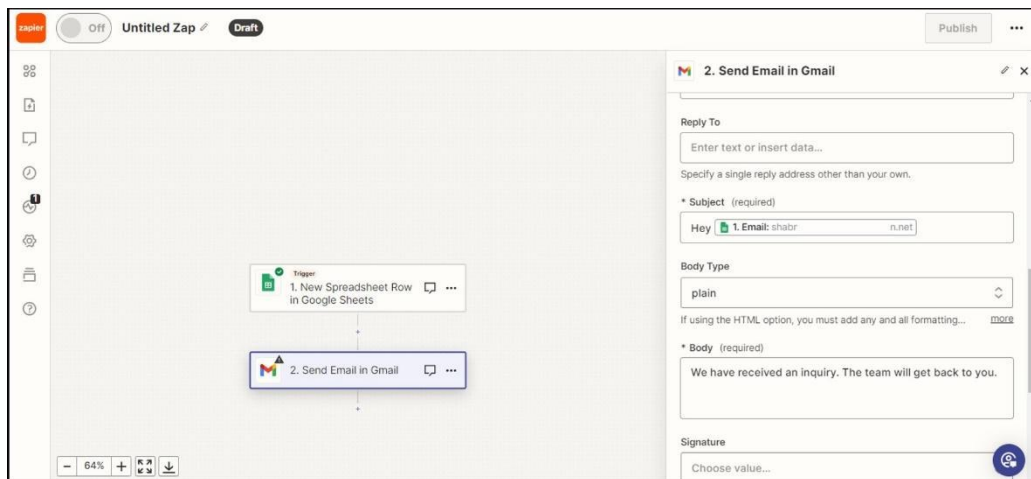
2.14 Click on **Continue**



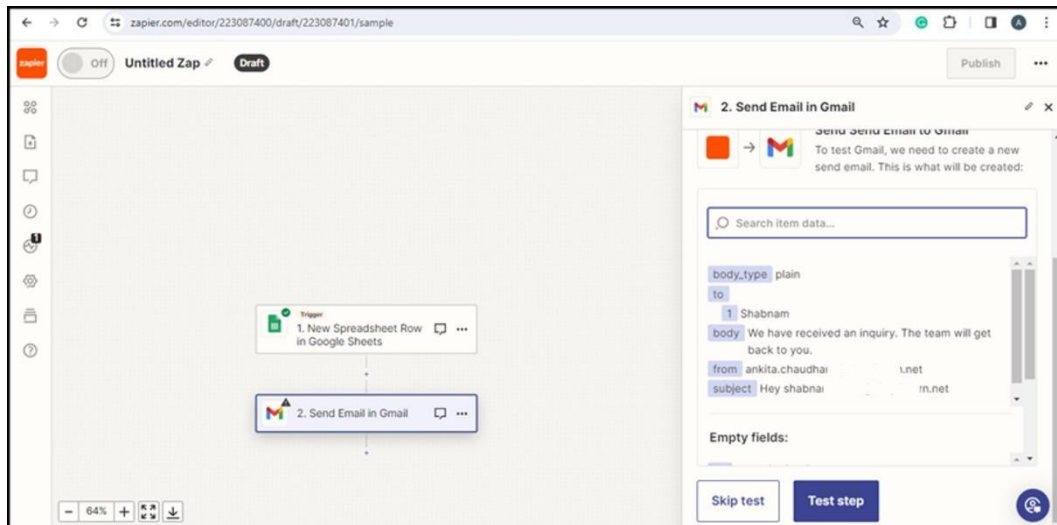
2.15 In the **To** section, select data from the sheet named **Lead data_sample**, which has an email ID stored



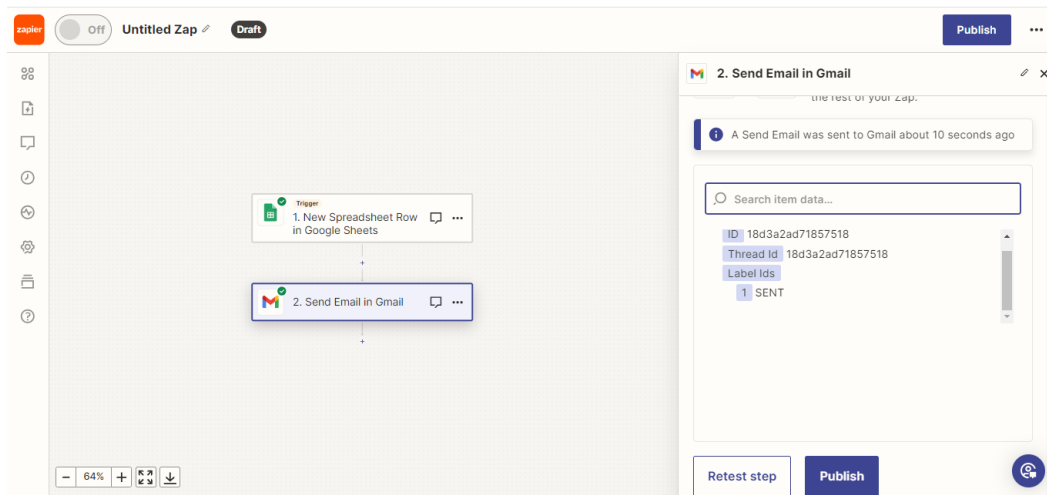
2.16 Select further action fields that you want to automate as shown below



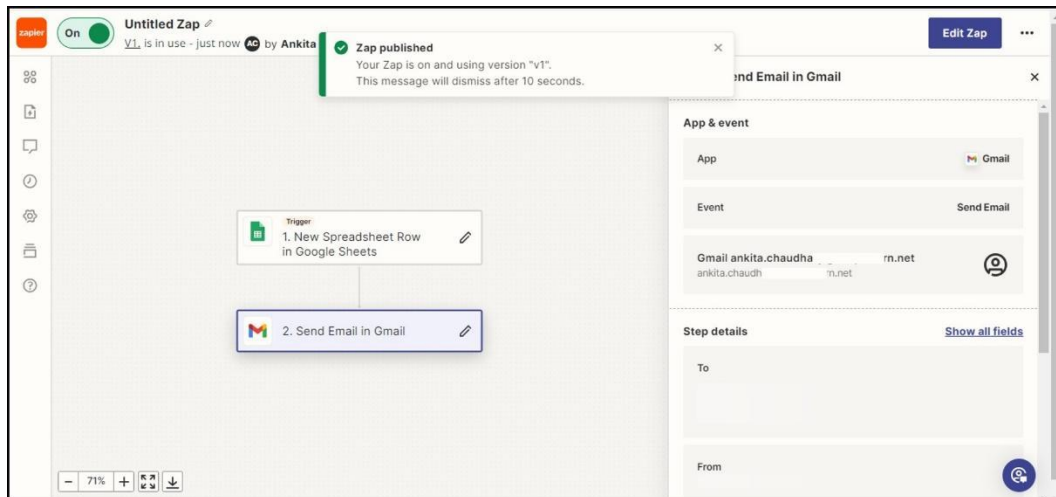
2.17 Verify the data and click on the **Test step**



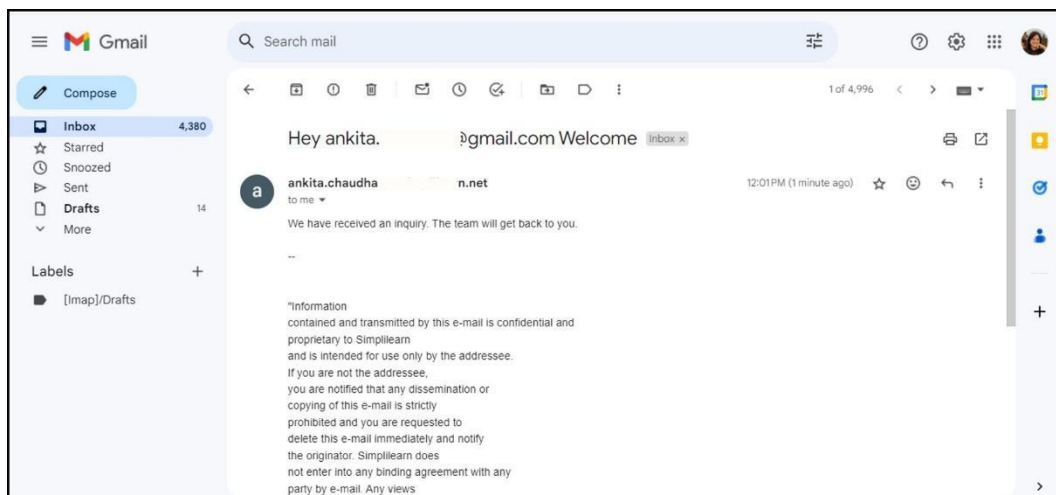
2.18 Zapier will act, and an email will be sent to the lead who has filled the form; click on **Publish**



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:

Congrats, you've created your first Zap! External Inbox x



Zapier <contact@zapier.com> [Unsubscribe](#)
to me ▾

12:05 PM (1 minute ago)



[Log in](#)

Woohoo, Ankita!

You created your first Zap!

You're off to a great start. Now let's find your next use case for how Zapier can help you automate busywork and focus on what matters:

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