

## 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

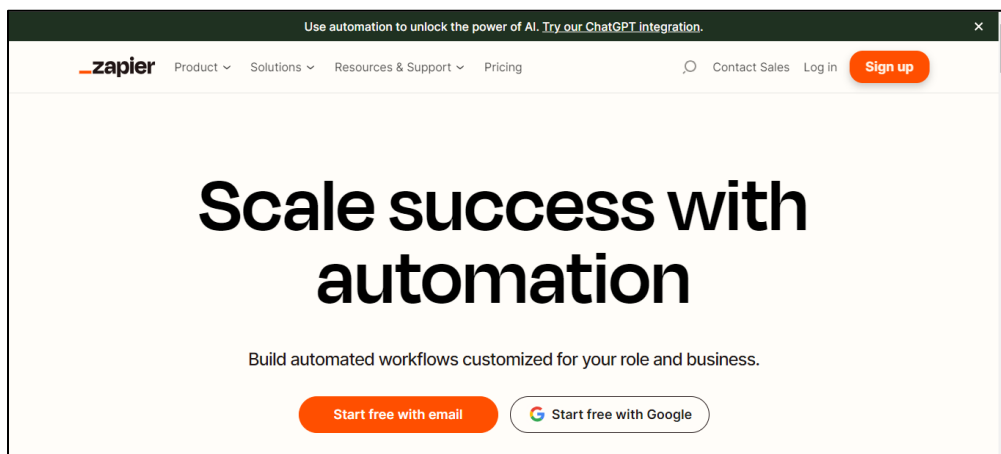
**Prerequisites:** None

Steps to be followed:

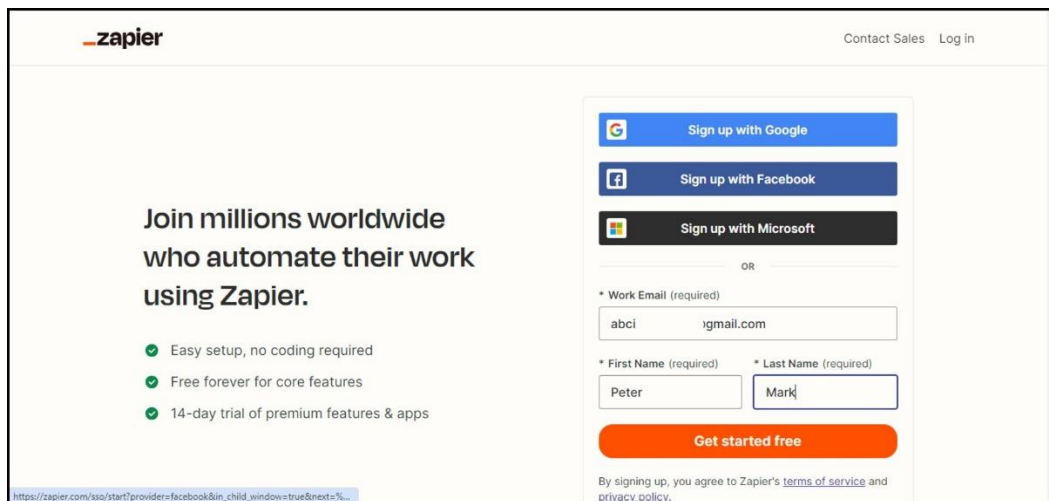
1. Set up a Zapier account
2. Create a Zap

#### Step 1: Set up a Zapier account

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



## 1.2 Enter the credentials



**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

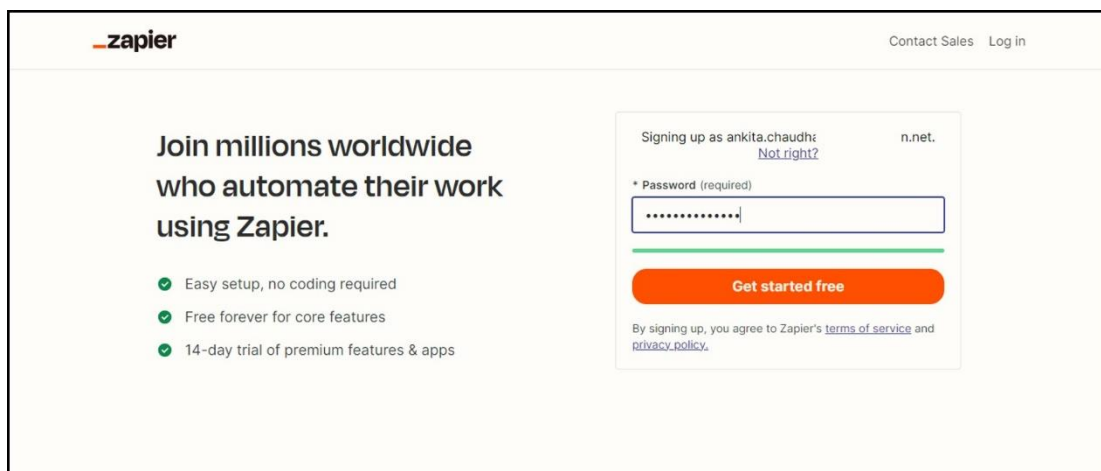
\* Work Email (required)

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

**Get started free**

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

## 1.3 Enter the Password



**zapier** Contact Sales Log in

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- ✓ 14-day trial of premium features & apps

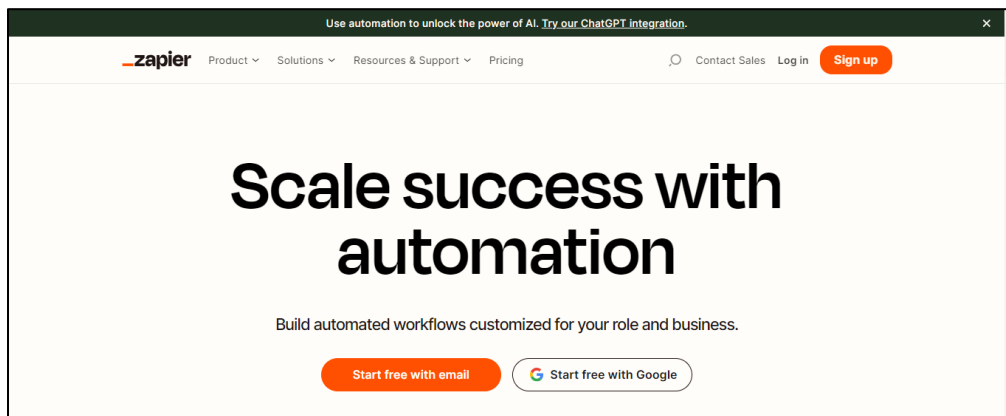
Signing up as ankita.chaudhary@gmail.com Not right? n.net.

\* Password (required)

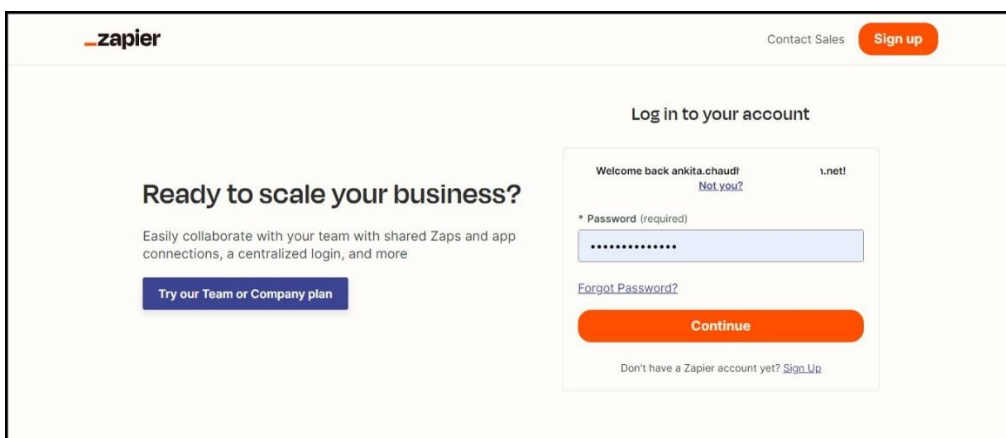
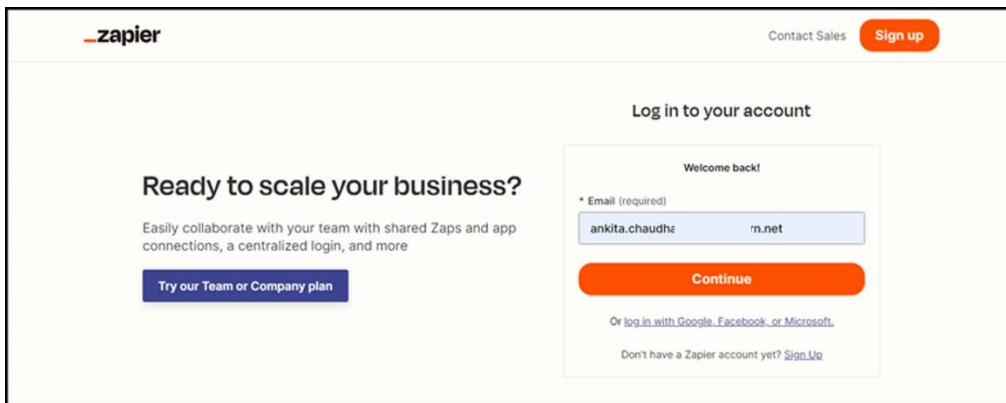
**Get started free**

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

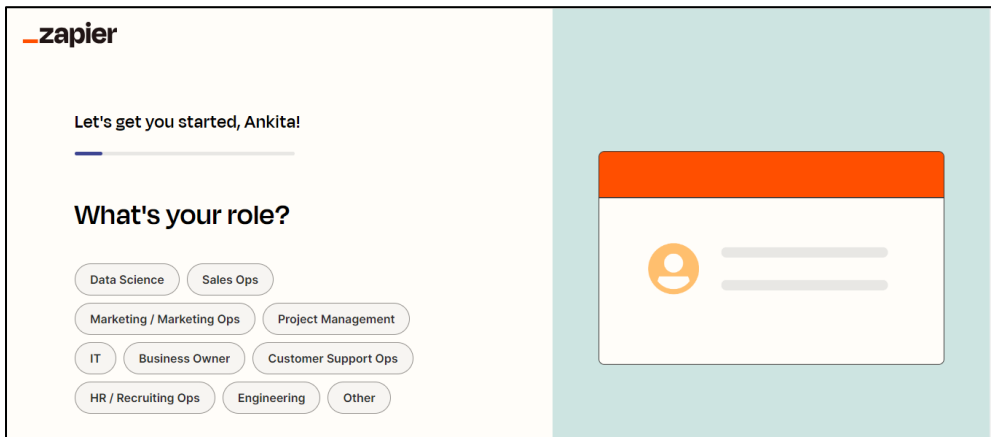
#### 1.4 Click on **Log in** next to the **Sign up** button



#### 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

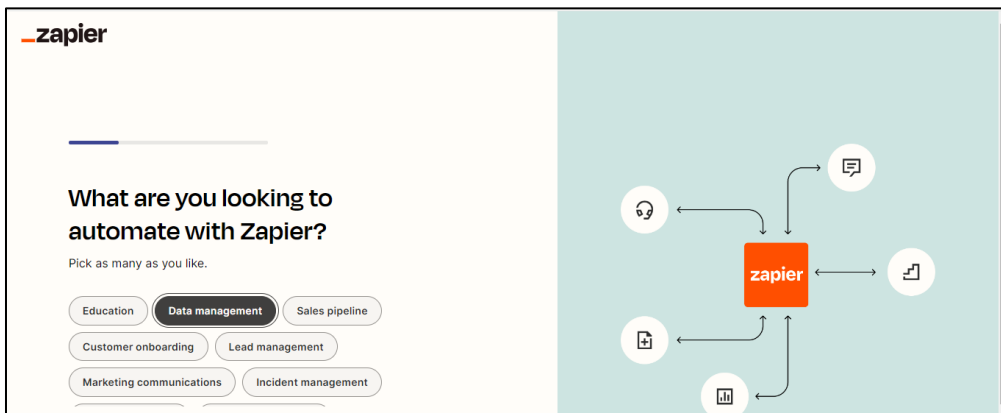
Marketing / Marketing Ops Project Management

IT Business Owner Customer Support Ops

HR / Recruiting Ops Engineering Other

The right sidebar shows a placeholder for a user profile picture and name.

## 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.

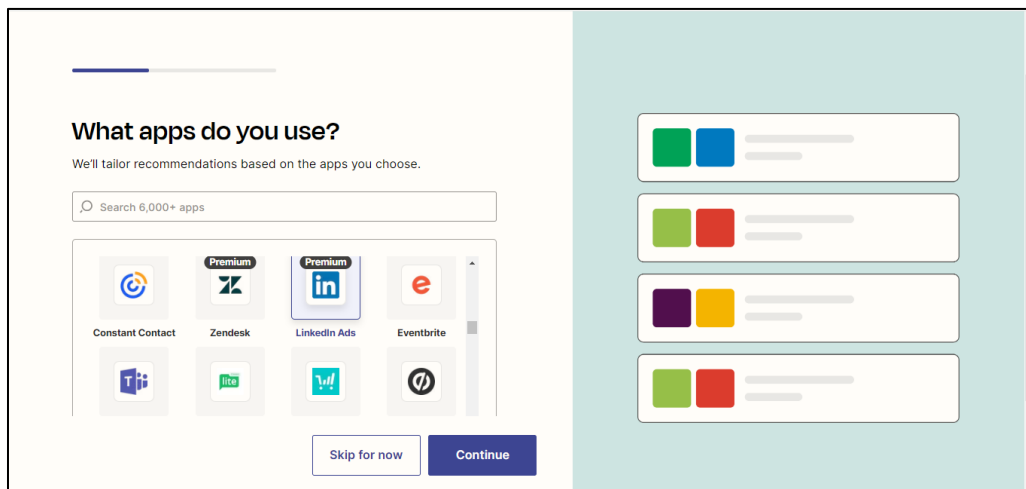
Education **Data management** Sales pipeline

Customer onboarding Lead management

Marketing communications Incident management

The right sidebar shows a diagram with the Zapier logo in the center, connected by arrows to various icons representing different automation use cases: a person (CRM), a document with a checkmark (compliance), a calendar (scheduling), a mail icon (email), a folder (file management), and a bar chart (analytics).

## 1.8 Select the apps you want to use



**What apps do you use?**  
We'll tailor recommendations based on the apps you choose.

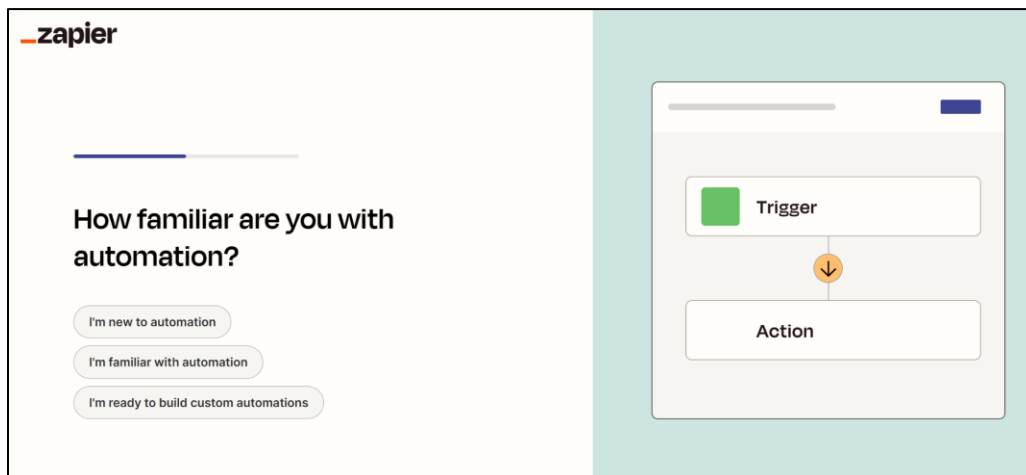
Search 6,000+ apps

Constant Contact, Zendesk, LinkedIn Ads, Eventbrite, Trello, iStock, Vimeo, SoundCloud

Skip for now Continue

The right sidebar shows four placeholder boxes, each containing two colored squares and a text input field for naming the automation.

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



**zapier**

**How familiar are you with automation?**

I'm new to automation  
I'm familiar with automation  
I'm ready to build custom automations

The right sidebar displays a visual workflow diagram with a 'Trigger' box connected to an 'Action' box by a downward arrow.

### 1.10 Select the company size

**zapier**

What's your company size?

1-49 50-249 250-999 1,000+

The diagram on the right illustrates a hierarchical structure. At the top is a single box containing one person icon. Below it is a box containing three person icons. At the bottom is a box containing four person icons. This visualizes the growth of a company from a single person to a large team.

### 1.11 Select the job level

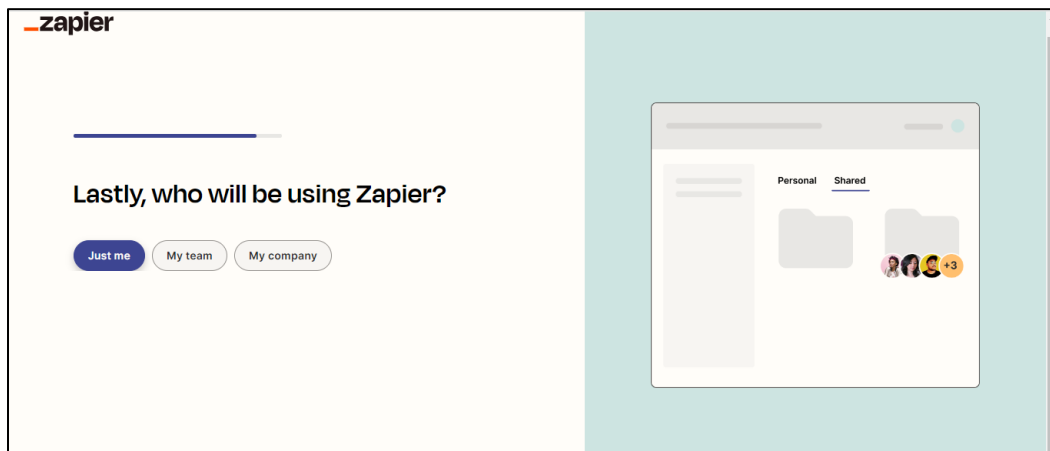
**zapier**

What's your job level?

Director VP / Exec Manager Individual contributor

The diagram on the right illustrates a hierarchical structure. At the top is a single box containing one person icon. Below it is a box containing four person icons. At the bottom is a box containing two person icons. This visualizes the different levels of a job hierarchy, from individual contributors to directors.

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

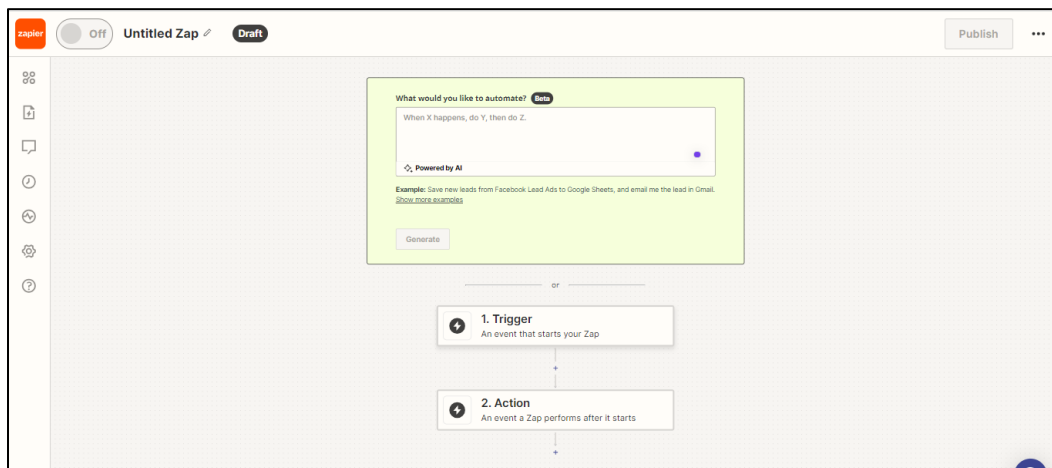


## Step 2: Create a Zap

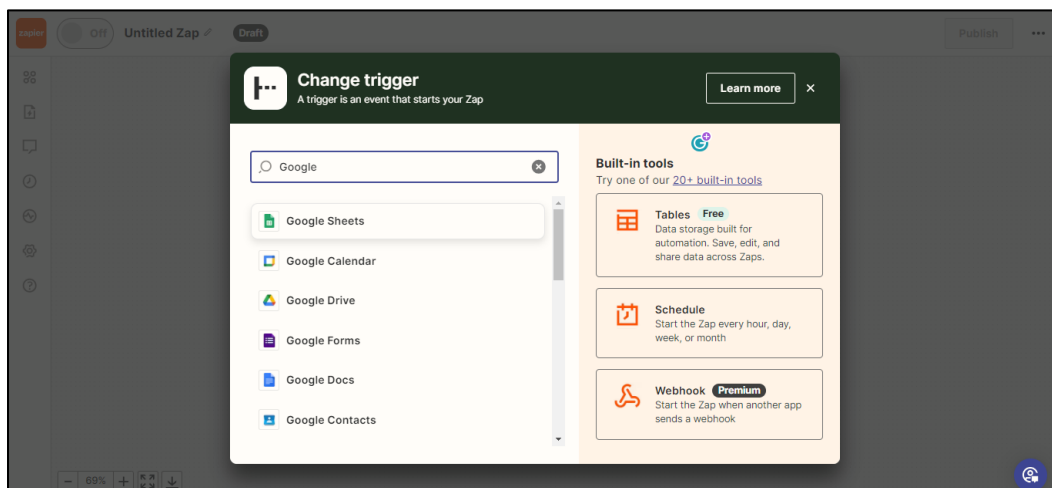
2.1 Navigate to the Zapier dashboard and click on **+ Create Zap**



## 2.2 Click on **Trigger**

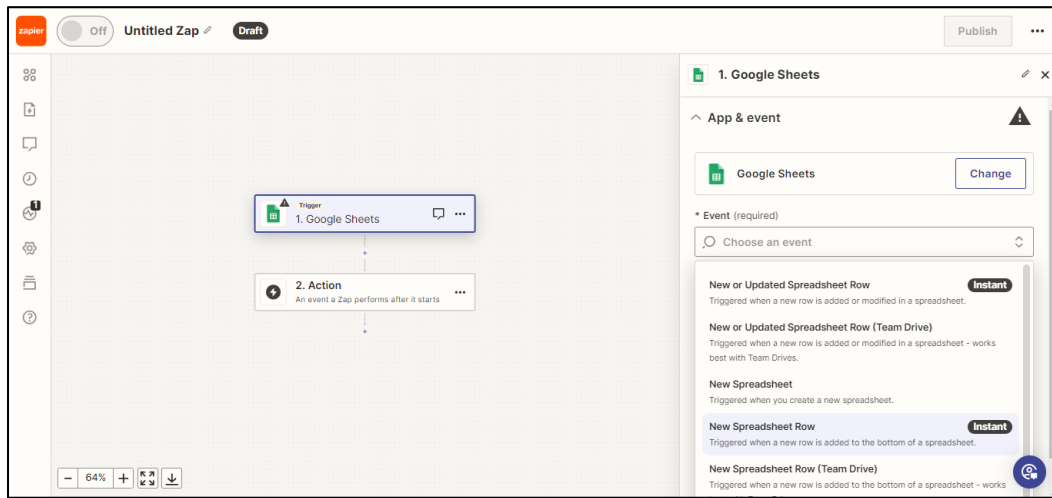


## 2.3 In the **Change trigger** page, search for and select **Google Sheets** in the search bar

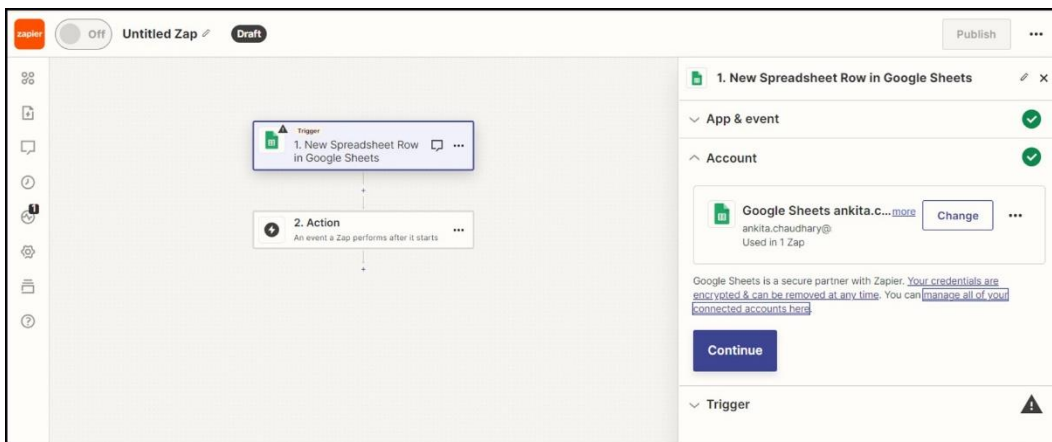
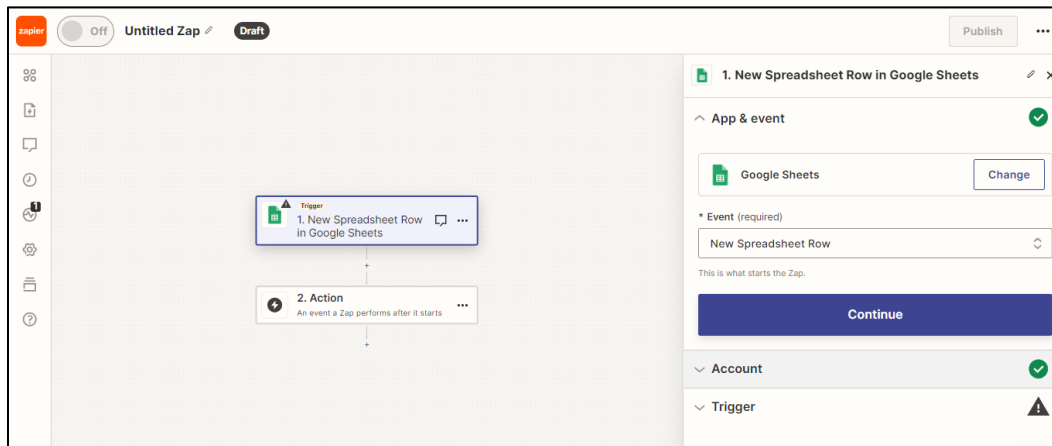




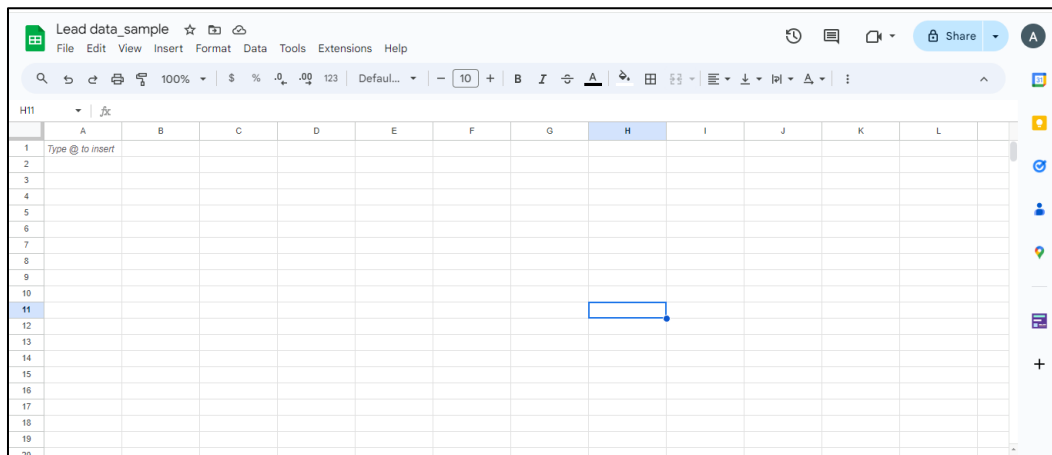
## 2.4 Under **Event** on the right panel, search and select **New Spreadsheet Row**



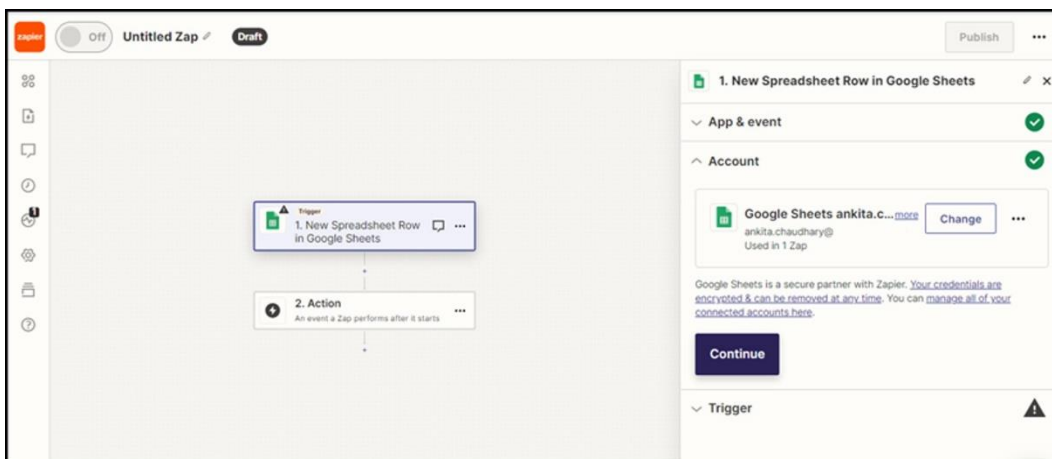
## 2.5 Click on **Account** and then select the Google account



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

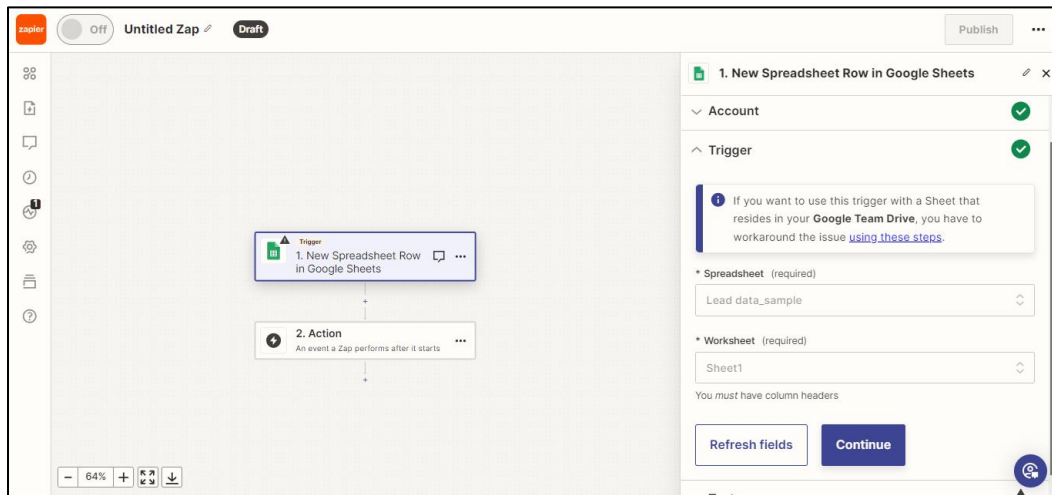


2.7 Once your account is connected, select **Continue**



## 2.8 Under **Spreadsheet**, select **Lead data\_sample**

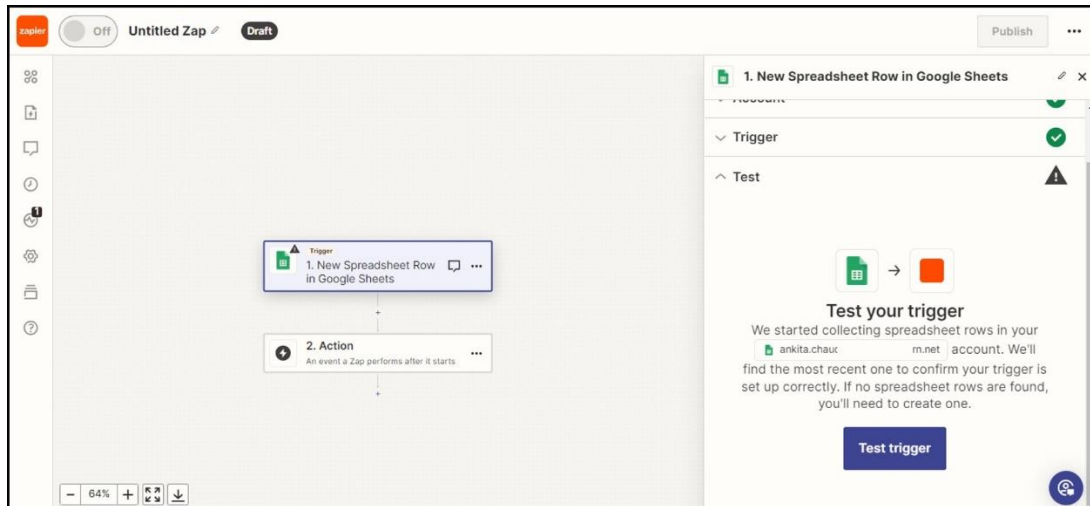
This shall appear automatically, as your Google Sheets is linked to your Google Drive account.  
In **Worksheet**, select **Sheet 1**.



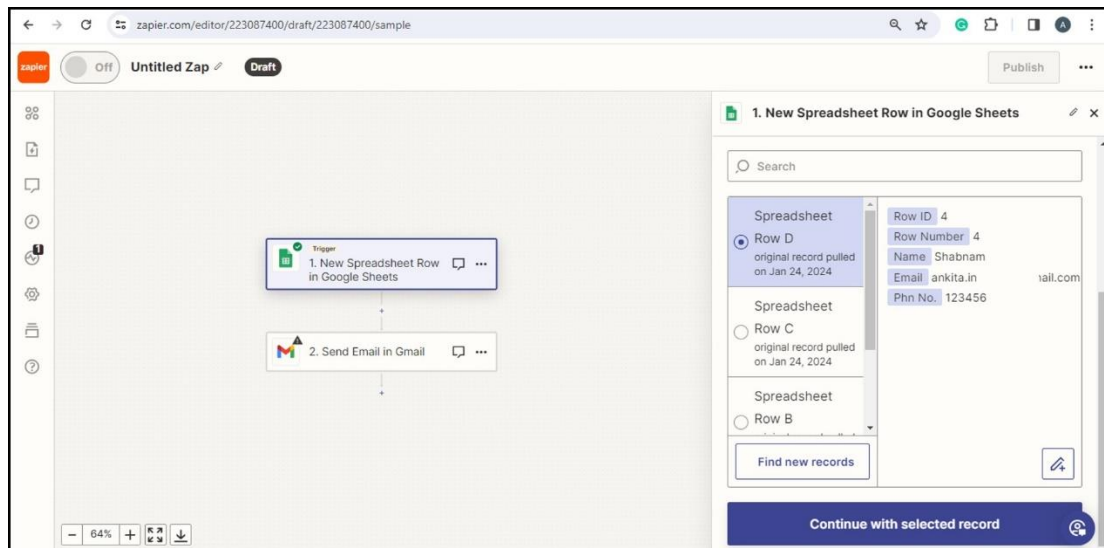
## 2.9 Now, fill up a sample data in the spreadsheet, **Lead data\_sample**

Lead data_sample						
File Edit View Insert Format Data Tools Extensions Help						
<div> <div> <div></div> <div>100%</div> <div>\$ % .0 .00 123</div> <div>Defaul...</div> <div>- 10 +</div> <div>B I</div> <div></div> <div>A</div> <div></div> </div> </div>						
E12	fx					
	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	il.com	123456		
5						
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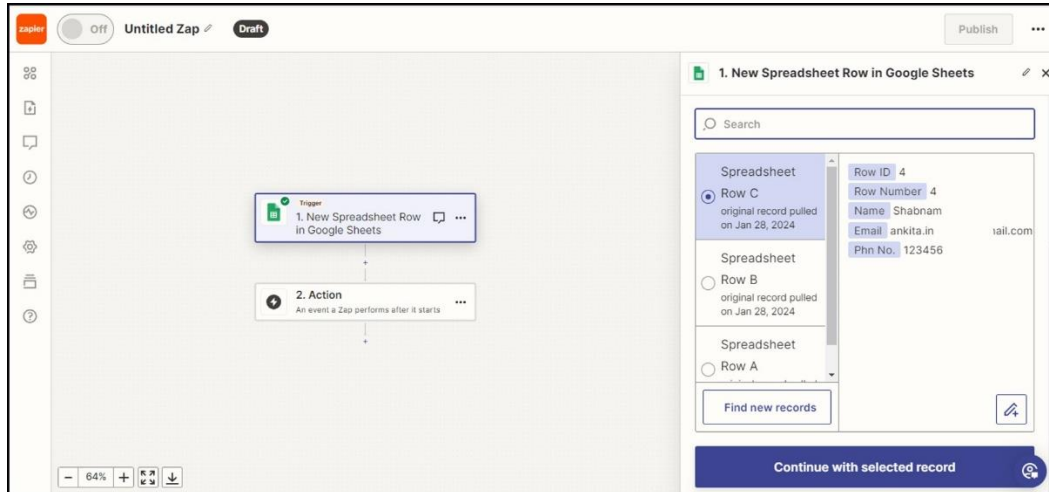
## 2.10 Click the **Test trigger** button to show the row data on Zapier



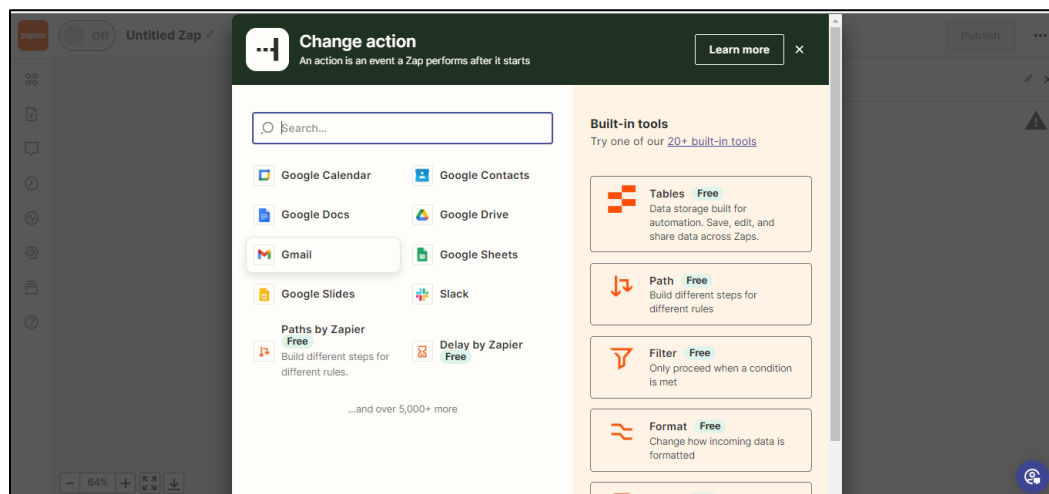
The following screen will appear:



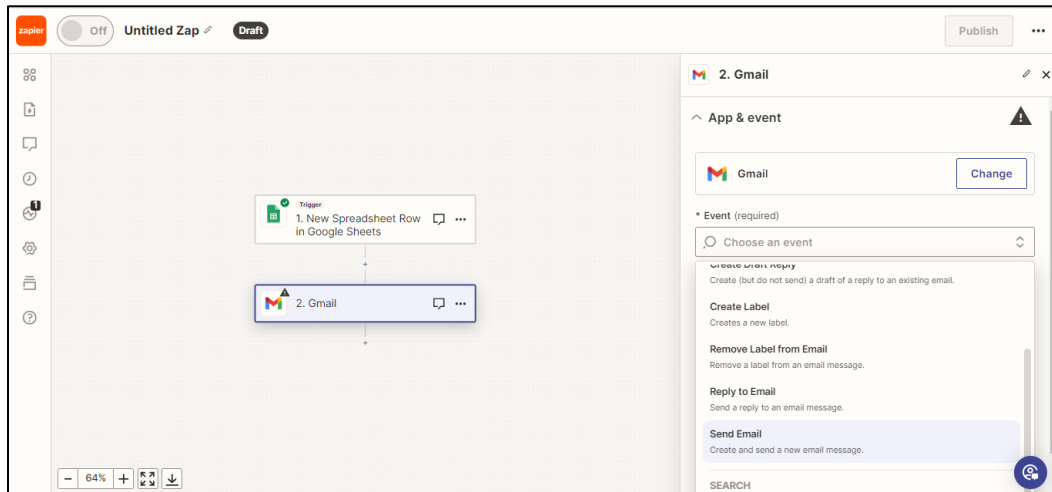
## 2.11 Click on **Action**



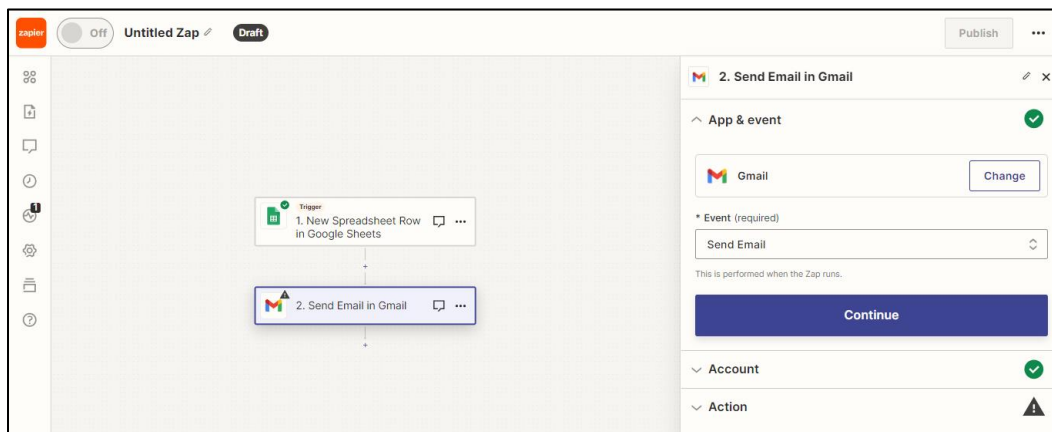
## 2.12 In the **Change action** page, search and select **Gmail**



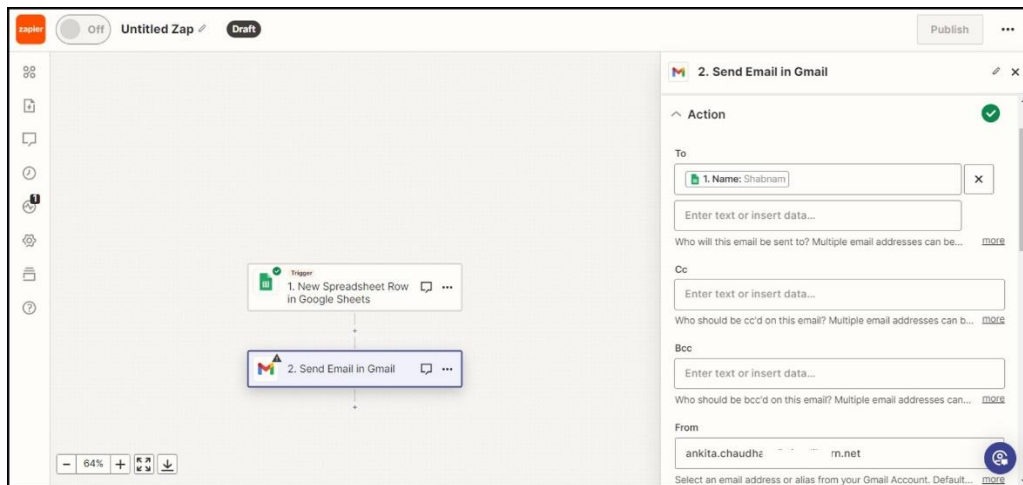
## 2.13 Under **Event**, search and select **Send Email**



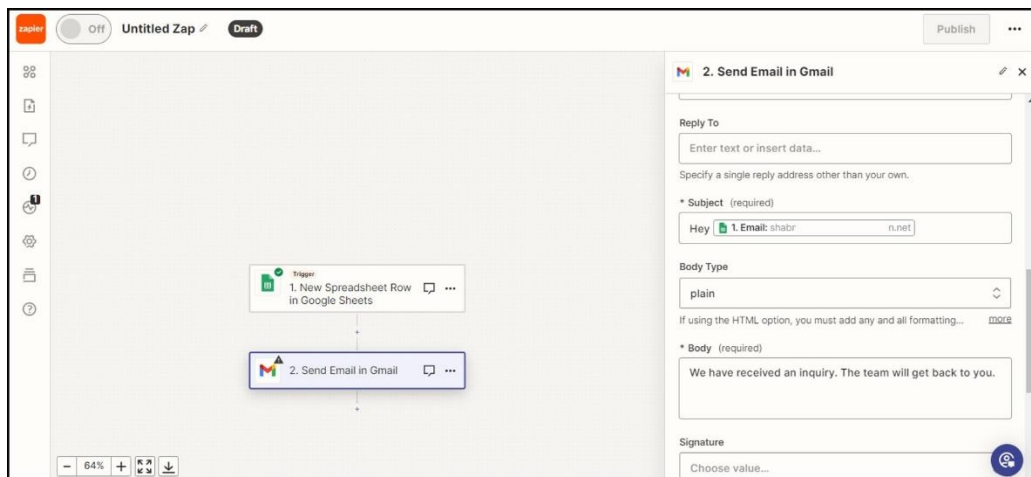
## 2.14 Click on **Continue**



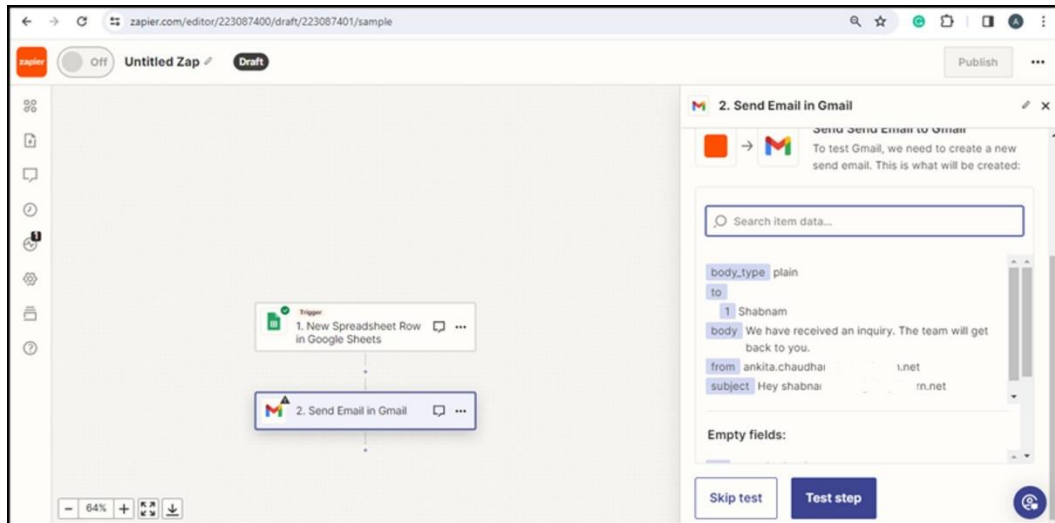
2.15 In the **To** section, select data from the sheet named Lead data\_sample, which has an email ID stored



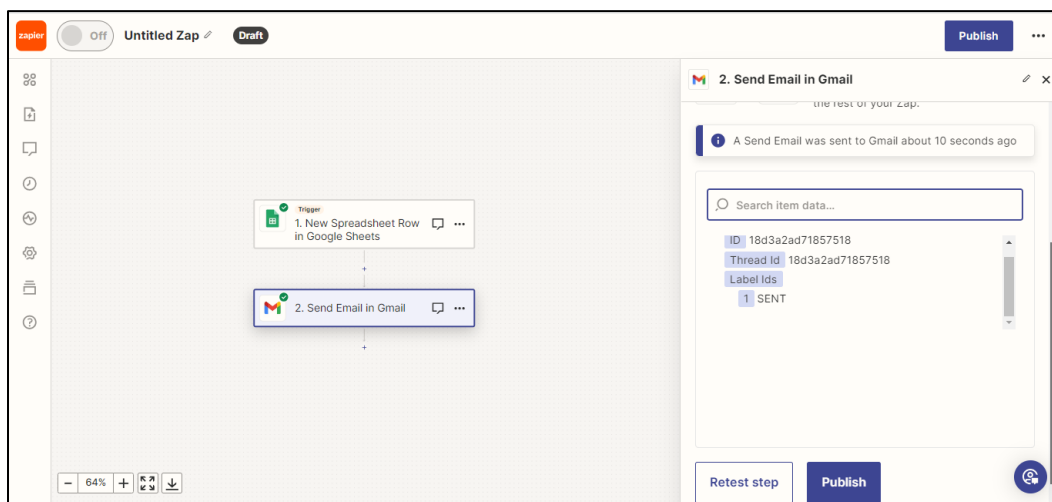
2.16 Select further action fields that you want to automate as shown in the screenshot below



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

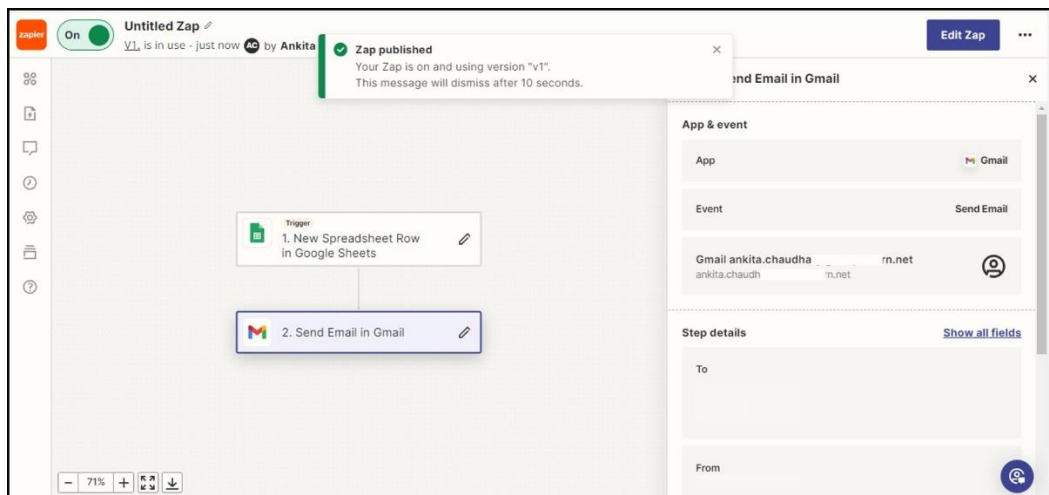


## 2.18 Zapier will act, and an email will be sent to the lead who has filled the form; click on **Publish**

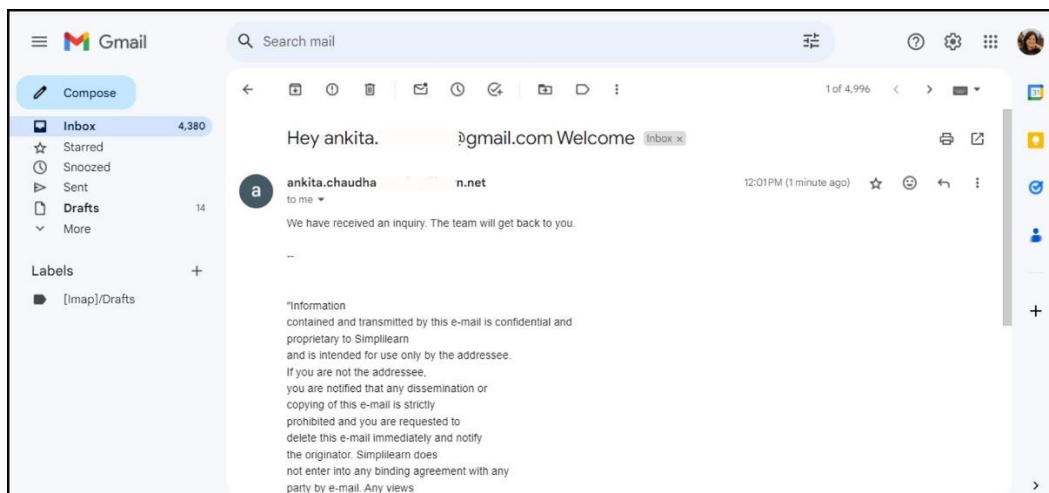




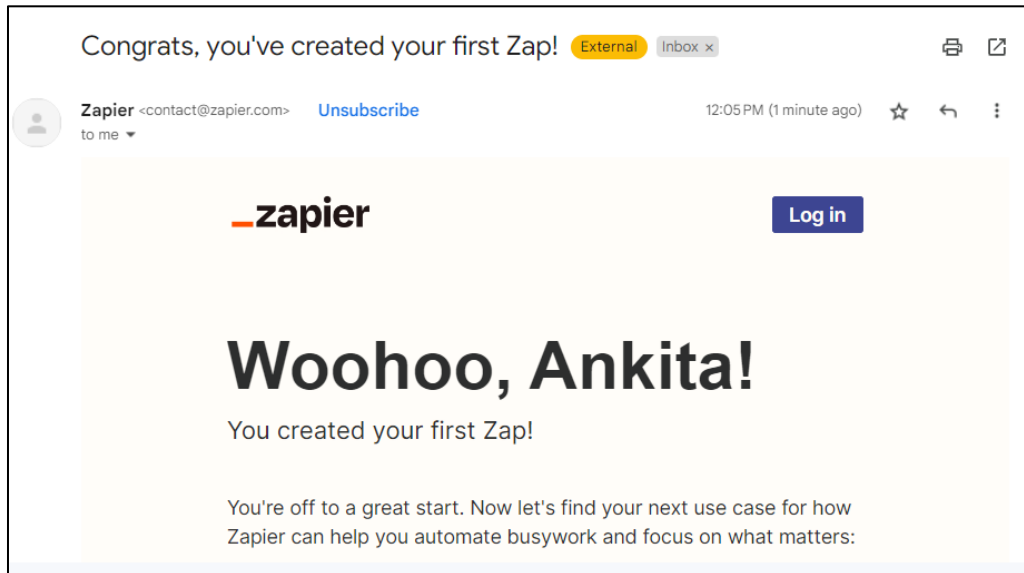
The following screen will appear:



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.