

# Project Guide: Email-to-Notion Task Tracker Automation using Zapier + AI

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## Objective:

Automate task extraction from Outlook emails, process them using AI, and organize them into a Notion project tracker — all without writing any code!

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## Tools Used:

- **Zapier** (Automation platform)
  - **AI by Zapier** (for email task extraction)
  - **Microsoft Outlook** (email source)
  - **Formatter by Zapier** (to clean up data)
  - **Looping by Zapier** (to handle multiple tasks)
  - **Microsoft Excel** (optional task lookup)
  - **Notion** (final task database)
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## Overview Flow:

1. **Trigger:** New email arrives in Outlook.
2. **AI by Zapier:** Extract structured tasks from email body.
3. **Formatter:** Parse the CSV-formatted tasks.
4. **Looping:** Process each task individually.
5. **Excel Lookup:** (Optional) Match or update based on existing records.
6. **Notion:** Save as a new task item.

Refer to the image below to visualize this workflow:

![Zapier Workflow](attachment:Zapier Automation Model.JPG)

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## Step-by-Step Instructions

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### Step 1: New Email Matching Search

**App:** Microsoft Outlook

**Action:** New Email Matching Search

- This step monitors your Outlook inbox for emails with specific filters (e.g., from a particular sender or with a subject containing “Tasks”).
  - **Why it's important:** Triggers the automation only for relevant emails.
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### Step 2: Extract Task Data Using AI

**App:** AI by Zapier

**Action:** Analyze and Return Data

- Paste this prompt in the “**Input**” field of the AI step:

You will receive the full body of an email.  
Extract every task and return the result **\*\*only\*\*** as a single CSV string.

CSV rules:

- "Task description","Person assigned","Due date (DD/MM/YYYY)","Start date (DD/MM/YYYY)"
- Wrap every field in double quotes.
- Convert dates to DD/MM/YYYY format.
- Repeat Start or Due date when shared for multiple tasks.

- **Why it's important:** AI converts messy task emails into structured CSV data with clear fields.
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### Step 3: Formatter by Zapier

**App:** Formatter by Zapier → Utilities → Text → Split

**Action:** Split CSV output (line-by-line or field-by-field)

- Configure the formatter to split each line of the AI's CSV into structured line items.
  - **Why it's important:** Prepares data for looping and ensures each task is processed individually.
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## Step 4: Looping by Zapier

**App:** Looping by Zapier

**Action:** Create Loop from Line Items

- Input each task line (excluding the header) to create a loop.
  - **Why it's important:** Allows individual handling of each task entry (person, due date, etc.).
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## Step 5: Find Row in Excel (Optional)

**App:** Microsoft Excel

**Action:** Find Row

- Check if a task already exists or fetch extra metadata.
  - **Why it's important:** Prevents duplication and adds context from your Excel system (like departments, task priority, etc.).
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## Step 6: Create Database Item in Notion

**App:** Notion

**Action:** Create Database Item

- Map the CSV fields:
    - **Task Name** → Task description
    - **Assigned To** → Person
    - **Due Date** → Calendar field
    - **Start Date** → Start Calendar
  - **Why it's important:** All extracted tasks finally land in your Notion workspace for tracking and collaboration.
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### **Example Input:**

Refer to your attached Outlook email screenshot and the Task Mail.docx file.

Example email snippet:

"@Rutvik Savkare. Due Date: 07/07/2025

Create 3–4 comic style chats for Instagram/LinkedIn"

AI by Zapier Output:

"Task description", "Person assigned", "Due date (DD/MM/YYYY)", "Start date (DD/MM/YYYY)"
"Create 3–4 comic style chats for Instagram/LinkedIn", "Rutvik Savkare", "07/07/2025", "04/07/2025"

### **Benefits:**

- ✓ No coding needed
- ✓ AI handles messy text extraction
- ✓ Flexible for other task formats
- ✓ Scalable for teams and large task volumes
- ✓ Integrates Excel & Notion easily