

Zapier

www.zapier.com

- ❑ Develop Workflows
- ❑ Perform Automations
- ❑ Execute Integrations
- ❑ Connect 8000+ online data sources

About Instructor:

Shahzad - Software Fractional Strategy Consultant - 25+ Years Of Experience In Software Industry - With Clients In Across North America And Europe, With Focus On:

- ❑ Cloud/SaaS- Software As Service
- ❑ Artificial Intelligence & Generative AI & LLM
- ❑ No-code/Low-code Software Development

About Institute:

NexSkill is Pakistan's leading IT training institute, providing the best IT training in Pakistan. NexSkill offers a variety of professional learning platforms to its students.

<https://www.nexskill.com/>

Explore essential products and features on Zapier

- ❑ An overview of the Zapier home page and where to start building workflows.
- ❑ How to use the Zapier visual editor to create and publish Zaps.
- ❑ How to leverage products such as Tables, Interfaces, AI Chatbots, and Canvas to connect to your Zaps and expand the automation experience with a suite of tools.
- ❑ Explore the Zap history, Apps directory, and where to find help resources when you need support.

Product	Primary Use	Key Highlights
Tables	Structured data storage & automation	No-task, triggers, formulas, linked records, AI support
Interfaces	Internal tools, forms, client-facing UI	Drag-drop pages, authentication, brandable portals
Chatbots	AI assistants on websites & portals	GPT-based, knowledge-driven, embedded, Zap-connected reply logic
Canvas	Visual + AI-based workflow design	Diagramming → live build, Copilot suggestions, versionable drafts

Summary Table

Each tool tightly integrates with Zapier's ecosystem—including Zaps, Tables, Interfaces, Chatbots, Agents, and Copilot—enabling users to **plan, build, automate, collaborate, and manage data** entirely within Zapier.

[\[zapier.com\]](https://zapier.com), [\[zapier.com\]](https://zapier.com), [\[community.zapier.com\]](https://community.zapier.com)

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✂️ Zapier Tables

- ❑ **Automation-first database:** native data storage that integrates with 8,000+ apps—exceeding standard spreadsheet sync. [\[help.zapier.com\]](https://help.zapier.com), [\[zapier.com\]](https://zapier.com)
- ❑ **Free-tier inclusion:** available on all plans and does *not* consume Zapier task usage. [\[zapier.com\]](https://zapier.com)
- ❑ **Flexible structure:** supports custom fields, formulas, linked records, summary & operators. [\[help.zapier.com\]](https://help.zapier.com)
- ❑ **Low-code import & triggers:** import via CSV/Sheets/Excel, and fire Zaps on record creation or updates. [\[help.zapier.com\]](https://help.zapier.com), [\[zapier.com\]](https://zapier.com)
- ❑ **Built-in actions:** edit, freeze, sort, filter, share, and set granular permissions. [\[help.zapier.com\]](https://help.zapier.com), [\[zapier.com\]](https://zapier.com)
- ❑ **Copilot integration:** AI-powered chat support to modify table content inline. [\[help.zapier.com\]](https://help.zapier.com), [\[help.zapier.com\]](https://help.zapier.com)


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Zapier Interfaces

- ❑ **No-code app builder:** drag-and-drop form, portal, and dashboard creator—integrated with Zapier workflows. [\[zapier.com\]](https://zapier.com), [\[zapier.com\]](https://zapier.com)
- ❑ **Templates for common needs:** lead capture, onboarding, client portals, billing tools. [\[zapier.com\]](https://zapier.com), [\[help.zapier.com\]](https://help.zapier.com)
- ❑ **Multicomponent pages:** build multi-page apps with forms, media embeds, Kanban boards, file uploads. [\[help.zapier.com\]](https://help.zapier.com), [\[help.zapier.com\]](https://help.zapier.com)
- ❑ **Permissions & hosting:** control access via magic links, passwords, or domain/web embed (advanced plan). [\[help.zapier.com\]](https://help.zapier.com), [\[help.zapier.com\]](https://help.zapier.com)
- ❑ **Brand customization:** client-branded layouts with logos, colors, subdomains. [\[help.zapier.com\]](https://help.zapier.com), [\[help.zapier.com\]](https://help.zapier.com)
- ❑ **Zap integration:** trigger/use Zaps or Tables—plus built-in AI Copilot edits. [\[help.zapier.com\]](https://help.zapier.com), [\[help.zapier.com\]](https://help.zapier.com)
- ❑ **Upgradeable components:** some advanced features (e.g., custom domains) require paid Interfaces plan. [\[help.zapier.com\]](https://help.zapier.com)

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❑ Zapier AI Chatbots

- ❑ **Embedded AI assistants:** build custom chatbots using GPT that integrate with your site and workflow. [\[zapier.com\]](https://zapier.com), [\[help.zapier.com\]](https://help.zapier.com)
- ❑ **Beta functionality:** currently open beta—free with limits for creation, conversations, and tokens. [\[help.zapier.com\]](https://help.zapier.com), [\[help.zapier.com\]](https://help.zapier.com)
- ❑ **Customization:** set directives, greetings, avatars, creative style, and AI model. [\[zapier.com\]](https://zapier.com), [\[help.zapier.com\]](https://help.zapier.com)
- ❑ **Knowledge integration:** import static files, web pages, or connect to Zapier Tables to inform responses. [\[zapier.com\]](https://zapier.com), [\[help.zapier.com\]](https://help.zapier.com)
- ❑ **Zap-powered reply flows:** trigger actions and send responses to/from apps like Gmail, Intercom, Zendesk. [\[help.zapier.com\]](https://help.zapier.com)
- ❑ **Branding & embed:** support for custom style, site embeds, portal inclusion, and public chat link. [\[help.zapier.com\]](https://help.zapier.com), [\[zapier.com\]](https://zapier.com)
- ❑ **Scalable tiers:** free tier allows two bots; larger capacities available via paid plans. [\[help.zapier.com\]](https://help.zapier.com), [\[zapier.com\]](https://zapier.com)

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Zapier Canvas

- ❑ **Visual designer:** free AI-powered flowchart tool to map and plan Zaps, Tables, Interfaces, Agents, Chatbots. [\[zapier.com\]](https://zapier.com), [\[zapier.com\]](https://zapier.com)
- ❑ **Automate from design:** convert Canvas visuals straight into live components (Zaps, Interfaces, Chatbots, Tables). [\[zapier.com\]](https://zapier.com), [\[help.zapier.com\]](https://help.zapier.com)
- ❑ **AI-assisted creation:** Copilot can generate or expand workflows based on natural-language instructions. [\[zapier.com\]](https://zapier.com), [\[zapier.com\]](https://zapier.com)
- ❑ **Workflow optimization:** view-by-node, split paths, grouped steps, step suggestions, field mapping. [\[zapier.com\]](https://zapier.com), [\[zapier.com\]](https://zapier.com)
- ❑ **Team collaboration:** comment, tag users, share editable/public links; supports real-time co-building. [\[zapier.com\]](https://zapier.com), [\[help.zapier.com\]](https://help.zapier.com)
- ❑ **Integrated UX:** clean transition between Canvas → workflow editor with inline edits via Copilot. [\[help.zapier.com\]](https://help.zapier.com), [\[community.zapier.com\]](https://community.zapier.com)

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Zapier Agents

- ❑ **AI-powered teammates** that work autonomously across Zapier's 8,000+ app integrations. [\[zapier.com\]](#), [\[zapier.com\]](#)
- ❑ **Teachable with natural language:** craft agent instructions in plain English; the prompt assistant helps refine them. [\[zapier.com\]](#), [\[help.zapier.com\]](#)
- ❑ **Support for templates:** including common roles like lead qualification, ticket triage, meeting preparation, and content creation. [\[zapier.com\]](#), [\[zapier.com\]](#) **Pod-based organization:** group agents into "Pods" to categorize them by function or workflow. [\[zapier.com\]](#), [\[zapier.com\]](#)
- ❑ **Activity dashboard:** view agent tasks, performance, triggers, and actions; monitor when human input is required. [\[zapier.com\]](#), [\[zapier.com\]](#)
- ❑ **Scalable autonomy:** agents handle routine tasks like lead processing, support responses, and content generation without human oversight. [\[zapier.com\]](#), [\[zapier.com\]](#)
- ❑ **Agent-to-agent orchestration:** enable specialized agents to work in sequence (e.g., lead qualifies → enrichment agent → sales alert). [\[zapier.com\]](#), [\[zapier.com\]](#)

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Zapier Agents – Part - 2

- ❑ **Access live knowledge:** connect agents to Box, Dropbox, Google Drive, and Tables so they can consume and act on real-time data. [\[zapier.com\]](#), [\[zapier.com\]](#)
- ❑ **Use AI and business data together:** enrich new leads by combining prompts with live app data (e.g., CRM records). [\[zapier.com\]](#), [\[zapier.com\]](#)
- ❑ **Interactive editing via Copilot:** fine-tune agent behavior in-app using Zapier's Copilot assistant. [\[help.zapier.com\]](#), [\[zapier.com\]](#)
- ❑ **No-code setup:** build agents in minutes—select template or write simple instructions, connect apps, and enable. [\[help.zapier.com\]](#), [\[zapier.com\]](#)
- ❑ **Support various use cases, such as:**
 - ❑ **Lead qualification:** read form data, score leads, send alerts . [\[zapier.com\]](#), [\[zapier.com\]](#)
 - ❑ **Content creation:** research, script, compile go-to-market assets. [\[zapier.com\]](#), [\[zapier.com\]](#)
 - ❑ **Support automation:** draft responses, triage tickets, summarize threads. [\[zapier.com\]](#), [\[zapier.com\]](#)
 - ❑ **Meeting prep:** aggregate attendee info and generate briefing docs. [\[zapier.com\]](#), [\[zapier.com\]](#)
- ❑ **Agent template gallery:** access community templates, customize, and deploy fast. [\[zapier.com\]](#), [\[help.zapier.com\]](#)
- ❑ **Manage agent tools:** connect or edit apps, actions, and knowledge sources anytime. [\[help.zapier.com\]](#), [\[zapier.com\]](#)
- ❑ **Agent lifecycle control:** disable or delete agents; activity logs and history are maintained. [\[help.zapier.com\]](#)

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❑ Zapier Functions (code-first automation)

- ❑ **Beta stage** accessible via Early Access or Open Beta. [\[zapier.com\]](https://zapier.com), [\[help.zapier.com\]](https://help.zapier.com)
- ❑ **Ideal for developers:** write workflows in **Python** (also JavaScript via Code by Zapier) within a full IDE. [\[zapier.com\]](https://zapier.com), [\[help.zapier.com\]](https://help.zapier.com)
- ❑ **Seamless integration:** use functions in Zaps, Agents, or Zapier's MCP servers. [\[help.zapier.com\]](https://help.zapier.com), [\[help.zapier.com\]](https://help.zapier.com)
- ❑ **Rich inputs/outputs:** define multiple triggers, input fields, and optional return data. [\[help.zapier.com\]](https://help.zapier.com), [\[help.zapier.com\]](https://help.zapier.com)
- ❑ **Supports libraries & secrets:** install Python packages and manage API keys in a secure environment. [\[help.zapier.com\]](https://help.zapier.com), [\[functions.zapier.app\]](https://functions.zapier.app)
- ❑ **Data mapping & auto-complete:** use `zapier.trigger_output` or `zapier.action.*` with code editor hints. [\[help.zapier.com\]](https://help.zapier.com), [\[help.zapier.com\]](https://help.zapier.com)
- ❑ **Debugging tools:** use `print()` for logging and inspect data via built-in logs. [\[help.zapier.com\]](https://help.zapier.com), [\[help.zapier.com\]](https://help.zapier.com)
- ❑ **Timeout and sandbox:** functions run up to ~5 minutes and are memory-limited. [\[help.zapier.com\]](https://help.zapier.com), [\[help.zapier.com\]](https://help.zapier.com)
- ❑ **Ideal for complex logic:** API orchestration, webhooks, data transformation, or automations not covered by no-code. [\[help.zapier.com\]](https://help.zapier.com), [\[help.zapier.com\]](https://help.zapier.com)

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Zapier Lead Router (auto-distribute incoming leads)

- ❑ In beta (closed or open) and available on **Pro+ plans**. [\[help.zapier.com\]](https://help.zapier.com), [\[zapier.com\]](https://zapier.com)
- ❑ Integrates as single Zap step—no complex paths required. [\[zapier.com\]](https://zapier.com), [\[zapier.com\]](https://zapier.com)
- ❑ Key concepts:
 - ❑ **Leads**: contain field data like company size or region.
 - ❑ **Sales reps**: have profiles with skill, region, weights.
 - ❑ **Queues**: group reps under shared rules.
 - ❑ **Routers**: define criteria and map leads → queues. [\[help.zapier.com\]](https://help.zapier.com), [\[zapier.com\]](https://zapier.com)
- ❑ Distribution types:
 - ❑ **Strict round robin**: assign leads evenly.
 - ❑ **Weighted round robin**: control lead flow per rep. [\[help.zapier.com\]](https://help.zapier.com), [\[zapier.com\]](https://zapier.com)
- ❑ **Fallback assignment** ensures unmatched leads still get routed. [\[zapier.com\]](https://zapier.com)
- ❑ Usage:
 - ❑ Add **Fields**, **Sales reps**, **Queues**, and **Routers** via dashboard. [\[help.zapier.com\]](https://help.zapier.com)
 - ❑ Define routing logic using flexible **AND/OR conditions**. [\[zapier.com\]](https://zapier.com)
- ❑ Task costs:
 - ❑ Each Lead Router step consumes **30 Zapier tasks**, static—even for complex routing. [\[zapier.com\]](https://zapier.com), [\[zapier.com\]](https://zapier.com)
 - ❑ Promotional periods may waive those charges. [\[zapier.com\]](https://zapier.com)
- ❑ **CRM + Notifications**: route leads, update CRM records, and send Slack/email alerts. [\[zapier.com\]](https://zapier.com), [\[zapier.com\]](https://zapier.com)

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Zapier Copilot

- ❑ **AI assistant across the Zapier platform**, embedded in home, Zap editor, Canvas, Tables, Interfaces, Agents & Chatbots. [zapier.com], [help.zapier.com]
- ❑ **Conversational setup**: define workflows through natural-language prompts—no scripting required. [zapier.com], [help.zapier.com]
- ❑ **Two build modes**:
 - ❑ **Auto-build**: Copilot constructs and populates Zaps directly.
 - ❑ **Ask-as-you-build**: Provides suggestions; builds only after user confirmation. [help.zapier.com]
- ❑ **Cross-product expertise**: can suggest and orchestrate multi-product solutions spanning Zaps, Tables, Interfaces, Agents, Canvas, and Chatbots. [zapier.com], [globenewswire.com]
- ❑ **Smart recommendations**: proposes triggers, actions, relevant built-in tools (Formatter, Delay, Filters), and templates or blog guides. [zapier.com], [help.zapier.com]
- ❑ **Context-aware guidance**: offers explanations of fields, suggestions for data mappings, and troubleshooting assistance within the editor. [consultevo.com], [help.zapier.com]
- ❑ **Visual support**: converts user descriptions or image/sketch attachments into Canvas diagrams and proposals before building. [zapier.com], [consultevo.com]
- ❑ **Seamless workflow handoffs**: redirects users to the right editors for specific components of a system (e.g., from Zap to Interface). [zapier.com], [globenewswire.com]

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Zapier Copilot –Part 2

- ❑ **Retains conversational context:** remembers earlier prompts to enable iterative system refinement. [\[globenewswire.com\]](https://globenewswire.com), [\[zapier.com\]](https://zapier.com)
- ❑ **Voice & file input support:** users can speak prompts or upload images for Copilot to interpret. [\[help.zapier.com\]](https://help.zapier.com)
- ❑ **Built-in beta access:** available in open beta—active development so features may evolve. [\[help.zapier.com\]](https://help.zapier.com), [\[zapier.com\]](https://zapier.com)
- ❑ **Enterprise-grade governance:** integrates with Admin Hub for usage visibility, permissions, and compliance across teams. [\[globenewswire.com\]](https://globenewswire.com), [\[enterprise...iworld.com\]](https://enterprise.iworld.com)
- ❑ **Broad integration support:** works across 8,000+ app integrations, including AI tools via Model Context Protocol (MCP). [\[globenewswire.com\]](https://globenewswire.com), [\[enterprise...iworld.com\]](https://enterprise.iworld.com)
- ❑ **Empowers non-technical users:** enables business users to build complex automations without coding. [\[globenewswire.com\]](https://globenewswire.com), [\[zapier.com\]](https://zapier.com)
- ❑ **Helpful downstream navigation:** when automation spans multiple Zapier tools, Copilot proactively guides users to the correct builder interface. [\[zapier.com\]](https://zapier.com), [\[consultevo.com\]](https://consultevo.com)

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Zapier MCP

- ❑ A **standardized bridge** that lets AI tools (e.g., **Claude**, **ChatGPT**, **Cursor**, **Windsurf**) **take real actions** in apps via Zapier's integration network—no custom back-end required. [\[zapier.com\]](https://zapier.com)
- ❑ Built on the open **Model Context Protocol (MCP)**—a two-way framework originally developed by Anthropic and now embraced across the ecosystem—so AI can access context *and* execute tasks safely. [\[zapier.com\]](https://zapier.com)
- ❑ Delivered as a **remote MCP server endpoint** you generate in Zapier and connect to your AI client; you then **scope which tools/actions** the AI is allowed to use. [\[help.zapier.com\]](https://help.zapier.com)

✂ Core capabilities

- ❑ **Connect once, act across ~8,000 apps and 30,000+ actions** (Slack, Sheets, Gmail, Notion, HubSpot, Jira, etc.). [\[zapier.com\]](https://zapier.com), [\[zapier.com\]](https://zapier.com)
- ❑ **Production-ready plumbing**: Zapier handles **auth**, rate limits, retries, and secure transport so you don't have to. [\[zapier.com\]](https://zapier.com)
- ❑ **Menu of tools per server**: add specific app actions (or “all tools” for an app), set fixed values, or let AI choose from allowed options. [\[help.zapier.com\]](https://help.zapier.com)
- ❑ **Task accounting**: each MCP tool call **consumes Zapier tasks** from your account (pricing/quotas apply). [\[zapier.com\]](https://zapier.com), [\[zapier.com\]](https://zapier.com)


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Zapier Zapier MCP –Part2

How it works (high level)

- ❑ You create a Zapier MCP server, configure tools (e.g., “Send Slack message”, “Add row in Sheets”), then paste the server URL into your AI client’s MCP settings. [\[help.zapier.com\]](https://help.zapier.com)
- ❑ From the AI chat, you issue natural-language commands; Zapier’s MCP resolves the intent and invokes the right tool/action with your connected credentials. [\[zapier.com\]](https://zapier.com)
- ❑ MCP’s standardization defines tools discovery and tool calls so clients can reliably list and execute actions. [\[modelcontextprotocol.io\]](https://modelcontextprotocol.io)



Typical use cases

- ❑ **Executive assistant:** “Schedule a meeting and notify the team in Slack”—AI books the calendar event and posts the update. [\[zapier.com\]](https://zapier.com)
- ❑ **Sales ops:** “Enrich new leads and update HubSpot”—AI pulls context and writes records to CRM. [\[zapier.com\]](https://zapier.com)
- ❑ **Inbox & docs:** “Summarize important Slack threads to a Google Doc” or “Send a Gmail follow-up” from chat. [\[zapier.com\]](https://zapier.com)

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Collaboration and sharing

- ❑ for anyone in a Zapier enterprise account who wants to know how to share Zaps and app connections with your teammates.
- ❑ Sharing Zaps and app connections with your team is powerful! The team gets visibility into and control over its key workflows, and everyone is able to maintain and improve upon the team's processes.
- ❑ By the end of this course you'll be able to:
 - Articulate how Zap and app sharing works in Zapier
 - Create teams
 - Create folders
 - Share Zaps
 - Share app connections

References:

<https://zapier.com/zap-sharing>

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Troubleshooting your Zaps

- ❑ Understanding the troubleshooting framework and how to dissect your Zap errors.
- ❑ Knowing where the error is coming from and how to trace the problem to the specific part of your Zap.
- ❑ Learning the skills to identify and fix common issues with an emphasis on troubleshooting: test records, error notifications, field mapping, APIs, and Zap history that may be causing disruptions or delays in your Zaps.

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The Zapier logo, featuring the word "zapier" in white lowercase letters with a small asterisk above the "i", set against an orange rounded square background.

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- ❑ Perform Automations
- ❑ Execute Integrations
- ❑ Connect 8000+ online data sources

Thanks for your time