

## Assignment No 3 **[Simplified Version of Assignment no 2]**

Dated: 30<sup>th</sup> Dec 2025

Course: "LOW CODE,NO-CODE"

Kindly note - Agenda:

- ✓ If don't have account, create account for ALL NEW APPS, Identified below: "AirTable", "HubSpot", "Google Forms", "Google Sheets", "Google Mail, or Gmail", "Outlook Mail, or Microsoft Outlook Mail". Also create account of, ActiveCampaign, Airtable, Asana, Buffer, ClickUp, Freshworks, Hootsuite, HubSpot, Jira, Klaviyo, Mailchimp, Marketo, Dynamics 365, Monday.com, NetSuite, PipeDrive, Salesforce, Shopify, Slack, Trello, Wrike, Zendesk, Zoho
- ✓ Create zap for each of the following cases. Separate zap for each of the following 15 cases.
- ✓ Debug/Trace – Analyze.
- ✓ Explore – to 25 App – tutorial – study material and training vidoes here:  
<https://github.com/ShahzadSarwar10/LOW-CODE-NO-CODE-B-1/tree/main/Zapier/Week3>
- ✓ Refine and refine. Improve and improve. Keep me posted. Thanks.

---

### ✓1. Marketing – Weekly Lead Sync & Tagging

**Problem:** Leads from HubSpot need weekly syncing to ActiveCampaign with proper tags.

**Steps:**

1. **Trigger:** Zapier **Schedule** – Every Friday at 5 PM.
2. **Action:** HubSpot – Find new leads created this week.
3. **Action:** Zapier **Formatter** – Format tags based on lead source.
4. **Action:** ActiveCampaign – Add leads with formatted tags.

---

### ✓2. Social Media – Multi-Platform Post Distribution

**Problem:** Posts created in Airtable should go to Buffer and Hootsuite with dynamic captions.

**Steps:**

1. **Trigger:** New record in Airtable.
  2. **Action:** Zapier **Formatter** – Generate captions (short for Twitter, long for LinkedIn).
  3. **Action:** Buffer – Schedule post.
  4. **Action:** Hootsuite – Schedule same post with LinkedIn caption.
-

### ✓3. Sales – High-Value Deal Alert

**Problem:** Notify team when PipeDrive deal > \$10,000 and update Salesforce. **Steps:**

1. **Trigger:** New deal in PipeDrive.
  2. **Action:** Zapier **Filter** – Continue only if deal value > 10,000.
  3. **Action:** Salesforce – Update opportunity stage.
  4. **Action:** Slack – Send alert to #sales.
- 

### ✓4. Support – SLA Breach Escalation

**Problem:** Escalate Zendesk tickets breaching SLA to Jira and Slack. **Steps:**

1. **Trigger:** Zendesk ticket updated.
  2. **Action:** Zapier **Filter** – Continue if SLA breached.
  3. **Action:** Jira – Create issue with ticket details.
  4. **Action:** Slack – Notify #support-escalations.
- 

### ✓5. eCommerce – Abandoned Cart Recovery

**Problem:** Shopify abandoned carts need Klaviyo email flow and Slack alert. **Steps:**

1. **Trigger:** Abandoned checkout in Shopify.
  2. **Action:** Zapier **Formatter** – Extract cart items and total.
  3. **Action:** Klaviyo – Add customer to recovery flow.
  4. **Action:** Slack – Notify #ecommerce team.
- 

### ✓6. Project – Task Sync Across Tools

**Problem:** Tasks in Asana should replicate in ClickUp and Trello for visibility. **Steps:**

1. **Trigger:** New task in Asana.
  2. **Action:** ClickUp – Create equivalent task.
  3. **Action:** Trello – Create card in backlog.
  4. **Action:** Zapier **Paths** – If task priority = High, send Slack alert.
- 

### ✓7. Marketing Automation – Webinar Registrant Routing

**Problem:** Registrants from Marketo need to be added to Mailchimp and Airtable. **Steps:**

1. **Trigger:** New registration in Marketo.
2. **Action:** Zapier **Formatter** – Normalize email and name fields.

3. **Action:** Mailchimp – Add to webinar list.
  4. **Action:** Airtable – Log registrant details.
- 

## ✓8. CRM – Lead Routing by Region

**Problem:** Leads from Zoho CRM should route to Dynamics 365 based on region. **Steps:**

1. **Trigger:** New lead in Zoho CRM.
  2. **Action:** Zapier **Paths** – Branch by region (US → Dynamics 365, EU → Salesforce).
  3. **Action:** Create lead in respective CRM.
  4. **Action:** Slack – Notify assigned rep.
- 

## ✓9. Social Media – Scheduled Campaign Push

**Problem:** Push campaign posts from Airtable to Buffer every Monday. **Steps:**

1. **Trigger:** Zapier **Schedule** – Every Monday at 9 AM.
  2. **Action:** Airtable – Find campaign posts.
  3. **Action:** Zapier **Looping** – Iterate through posts.
  4. **Action:** Buffer – Schedule each post.
- 

## ✓10. Customer Success – Onboarding Workflow

**Problem:** New Freshworks customer triggers onboarding tasks in Monday.com. **Steps:**

1. **Trigger:** New customer in Freshworks.
  2. **Action:** Zapier **Formatter** – Format onboarding checklist.
  3. **Action:** Monday.com – Create onboarding board.
  4. **Action:** Slack – Notify CSM team.
- 

## ✓11. Finance – Invoice Follow-Up

**Problem:** NetSuite invoices need follow-up tasks and Slack alerts. **Steps:**

1. **Trigger:** New invoice in NetSuite.
  2. **Action:** Zapier **Filter** – Continue if invoice unpaid after 7 days.
  3. **Action:** Wrike – Create follow-up task.
  4. **Action:** Slack – Notify finance team.
-

## ✓12. Marketing – Email Sync Across Platforms

**Problem:** Contacts added to ActiveCampaign should sync to Klaviyo. **Steps:**

1. **Trigger:** New contact in ActiveCampaign.
  2. **Action:** Zapier **Formatter** – Clean email and name.
  3. **Action:** Klaviyo – Add to list.
  4. **Action:** Slack – Confirm sync.
- 

## ✓13. Support – Multi-Channel Escalation

**Problem:** Zendesk tickets tagged “critical” need Jira issue and Slack alert. **Steps:**

1. **Trigger:** New Zendesk ticket tagged critical.
  2. **Action:** Jira – Create bug issue.
  3. **Action:** Zapier **Formatter** – Summarize ticket details.
  4. **Action:** Slack – Notify #critical-support.
- 

## ✓14. Sales – Quote Approval Workflow

**Problem:** Approved quotes in Salesforce should create tasks in Monday.com. **Steps:**

1. **Trigger:** Quote approved in Salesforce.
  2. **Action:** Zapier **Formatter** – Extract quote details.
  3. **Action:** Monday.com – Create fulfillment task.
  4. **Action:** Slack – Notify sales team.
- 

## ✓15. Product – Bug Reporting Loop

**Problem:** Jira bugs should create Trello cards and Slack alerts for PMs. **Steps:**

1. **Trigger:** New bug in Jira.
2. **Action:** Zapier **Looping** – Iterate through bug components.
3. **Action:** Trello – Create card for each component.
4. **Action:** Slack – Notify product team.

## ✓Key Zapier Utilities Used

- **Schedule:** Automate recurring tasks (weekly sync, campaign push).
- **Filter:** Conditional logic (deal value > \$10k, SLA breach).
- **Formatter:** Data cleanup and transformation (normalize fields, extract details).
- **Paths:** Branch workflows (region-based routing, priority alerts).
- **Looping:** Handle multiple items dynamically (social posts, bug components).