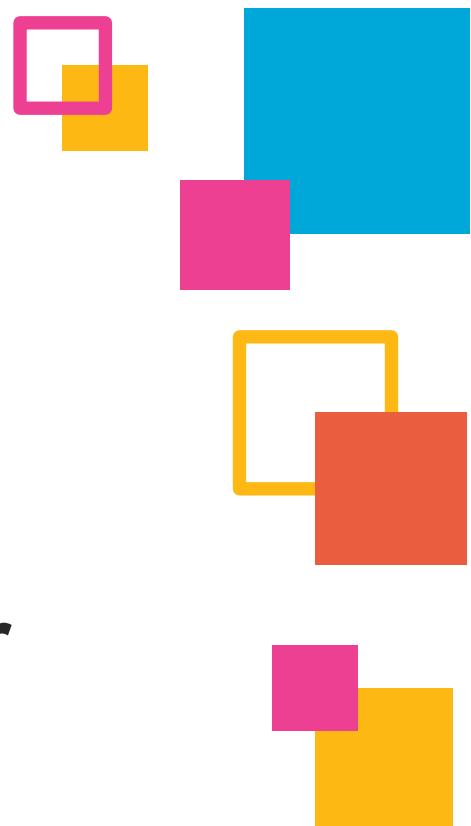




join



Hands-on Lab: Operationalize Data with Zapier



Zev Lebowitz

Sales Engineering



looker.com/hol

Select the **Operationalize Data with Zapier** lab in the drop-down

Set up your accounts



Free trial at zapier.com



JOIN2019 Workspace

Check your inbox or fill
out the Google form



JOIN2019.looker.com

Check your inbox or fill
out the Google form



Zev Lebowitz

Manager, Sales Engineering

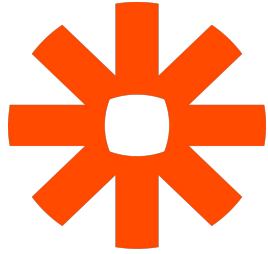


We want people to **talk** about their
deals and work through them in a
consistent way

Every trial gets a Slack channel



Trial created in
Salesforce



Salesforce sends this
data to Zapier



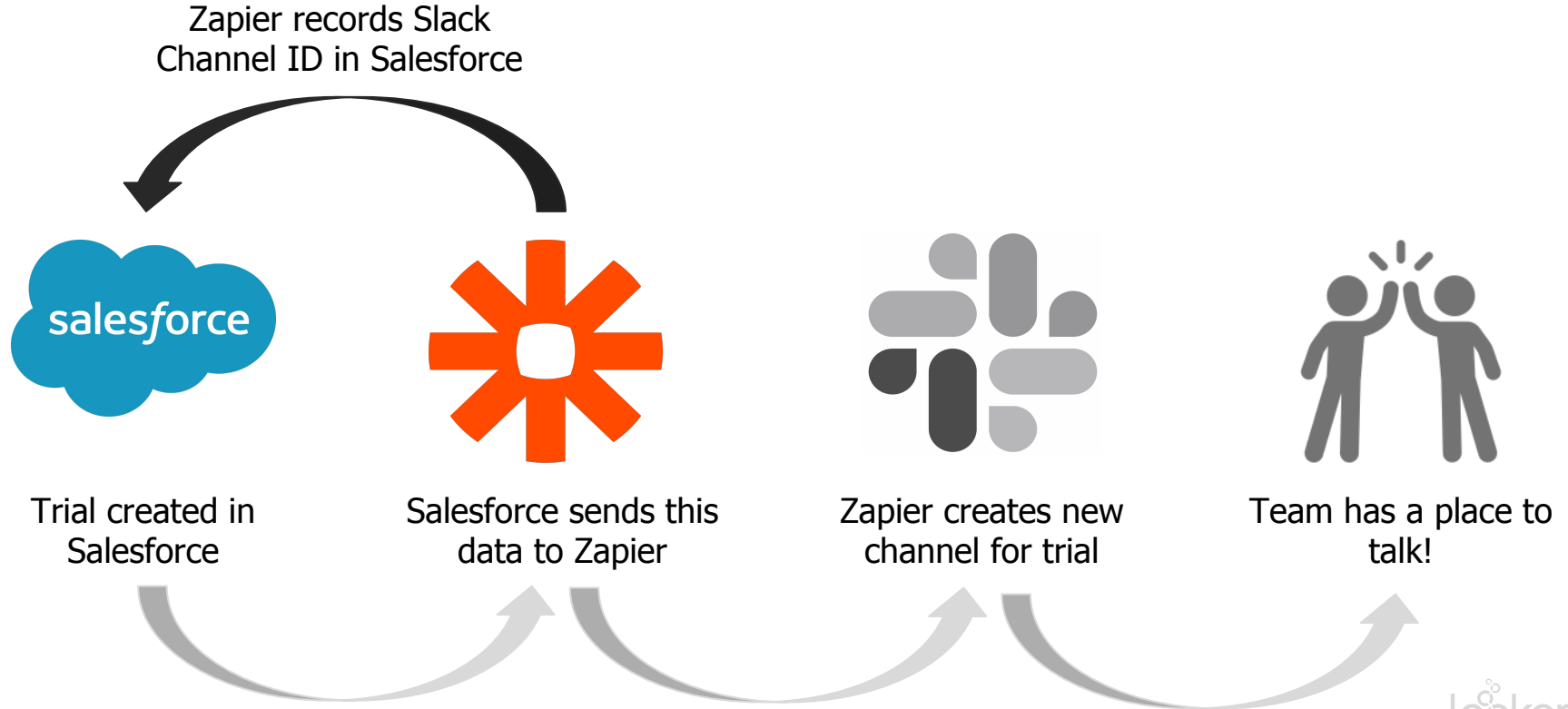
Zapier creates new
channel for trial



Team has a place to
talk!



The key to making it repeatable



	Account Slack Channel ID ▾	User Daily Activity Total Approximate Usage In Minutes	User Daily Activity Active Users	User Daily Activity Explore Queries	User Daily Activity View Dashboard
1	CPA9QMX29	5	1	0	0
2	CP7H6F8A3	580	4	75	69
3	CP6S2FLH4	1,375	3	276	39
4	CP6Q7HHMJ	25	2	3	1
5	CP6PB0DBN	5	1	0	0
6	CP4QP3B61	385	3	50	38



Zapier APP 4:04 AM

Hey team, here's what your trial has been up to in the last week:

5 Usage minutes

1 Unique users

0 Explore queries

0 Dashboard views



Zapier APP 4:04 AM

Hey team, here's what your trial has been up to in the last week:

1,375 Usage minutes

3 Unique users

276 Explore queries

39 Dashboard views



Zapier APP 4:04 AM

Hey team, here's what your trial has been up to in the last week:

385 Usage minutes

3 Unique users

50 Explore queries

38 Dashboard views



Scheduled updates: Sparking conversations



Zapier APP 4:02 AM

Hey team, here's what has been up to in the last week:

555 Usage minutes

8 Unique users

79 Explore queries

14 Dashboard views



Zapier APP 6:02 AM

AE Stage: Negotiate (21 days) SE Stage: **Technical Selected** (7 days)

Close Date: 2019-09-30 ACV: \$18,000

Alerts:

| 10 days in AE Stage

Close date in the past

Is this data up to date?

Do you know what you need to reach the next Sales and Tech Stages?

Do you have a plan for this deal this week?



Bruk Dinberu 9:42 AM

@max.lindemann high usage again last week



max.lindemann 3:53 PM

So I think Nick tomorrow if you could say to that we're shutting down the instance since this is just a legal matter at this point

Alerts: Driving proactive responses



Zapier APP 11:05 AM

[REDACTED] **chatted with support!**

[Zendesk Ticket Link](#)

Chat time: 2019-09-05 06:09:30 (PST)

Ticket (Incident) from [REDACTED]

Zendesk

[Chat with](#) [REDACTED]

Chat started: 2019-09-05 01:08 PM UTC

Served by: Danielle

IP: 72.89.169.22

User Agent: Mozilla/5.0 (Macintosh; Intel Mac OS X 10_14_6) AppleWebKit/537.36

(KHTML, like Gecko) Chrome/76.0.3809.100 Safari/537.36

Country: United States

City: Brooklyn

[Show more](#)

Sep 5th



shelley 11:24 AM

will looks like hes working through a bunch of modeling! dcl has been rockstars for them!



Joe Kremer 11:25 AM

thanks!

The background is a solid purple color. It features a series of thin, light-purple lines radiating from a central point, creating a sunburst or starburst effect. There are three abstract, light-purple shapes: a small cluster of horizontal lines on the left, a rectangular grid of dots on the right, and a series of vertical bars of varying heights on the right.

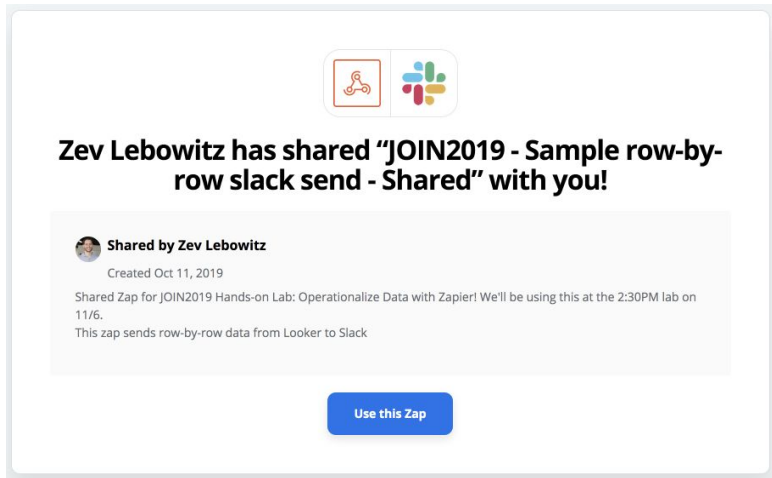
Let's try it out!

Using our pre-built Zap

Using our pre-built Zap

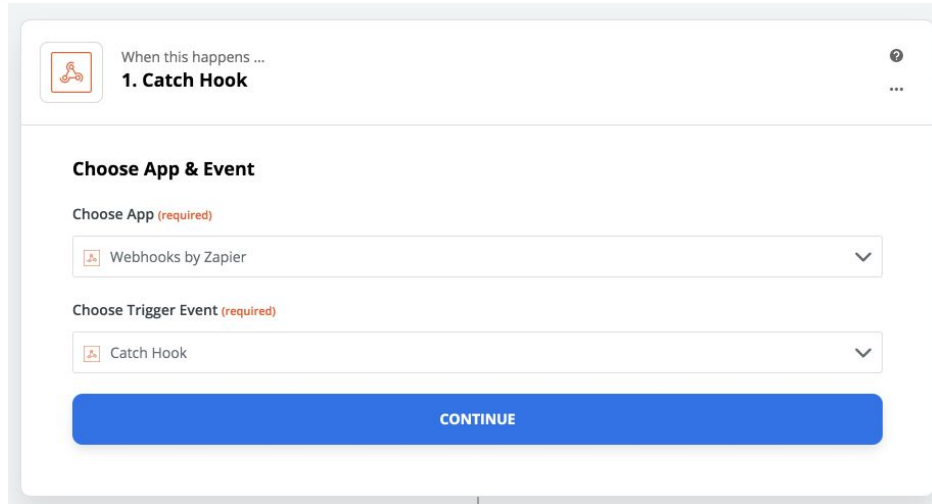
Save a Look and then set up your Zap.

- Open up the Zap template we've set up for you.
- Click **Use this Zap**.



Using our pre-built Zap

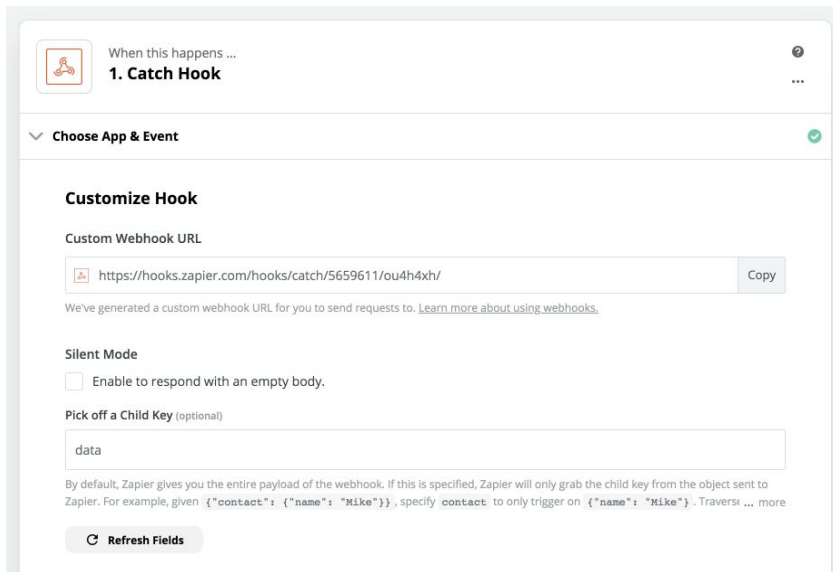
Open up step 1 and click **Continue**.



The screenshot shows the first step of a Zap configuration in Zapier. At the top, there's a header with a Zapier logo icon, the text "When this happens ...", and a question mark icon. Below this is the section title "1. Catch Hook". The main area is titled "Choose App & Event". It contains two dropdown menus. The first is labeled "Choose App (required)" and has "Webhooks by Zapier" selected. The second is labeled "Choose Trigger Event (required)" and has "Catch Hook" selected. At the bottom of the form is a large blue button labeled "CONTINUE".

Using our pre-built Zap

Copy the **Custom Webhook URL** field to your clipboard.




The screenshot shows the Zapier 'Customize Hook' configuration page. At the top, it says 'When this happens ... 1. Catch Hook'. Below this is a section titled 'Choose App & Event' with a green checkmark. The main section is 'Customize Hook'. It features a 'Custom Webhook URL' field containing the URL 'https://hooks.zapier.com/hooks/catch/5659611/ou4h4xh/'. To the right of the URL is a 'Copy' button. Below the URL field, there is a note: 'We've generated a custom webhook URL for you to send requests to. [Learn more about using webhooks.](#)'. Further down, there is a 'Silent Mode' section with a checkbox labeled 'Enable to respond with an empty body.' which is currently unchecked. Below that is a 'Pick off a Child Key (optional)' section with a text input field containing the word 'data'. At the bottom, there is a 'Refresh Fields' button. A small explanatory text at the very bottom states: 'By default, Zapier gives you the entire payload of the webhook. If this is specified, Zapier will only grab the child key from the object sent to Zapier. For example, given {"contact": {"name": "Mike"}}, specify contact to only trigger on {"name": "Mike"}. Traversi ... more'.

When this happens ...
1. Catch Hook

Choose App & Event

Customize Hook

Custom Webhook URL

 https://hooks.zapier.com/hooks/catch/5659611/ou4h4xh/ Copy

We've generated a custom webhook URL for you to send requests to. [Learn more about using webhooks.](#)

Silent Mode

☐ Enable to respond with an empty body.

Pick off a Child Key (optional)

data

By default, Zapier gives you the entire payload of the webhook. If this is specified, Zapier will only grab the child key from the object sent to Zapier. For example, given {"contact": {"name": "Mike"}}, specify contact to only trigger on {"name": "Mike"}. Traversi ... more

Refresh Fields

Using our pre-built Zap


Set up a scheduled webhook from Looker to the URL provided by Zapier.

- Create a schedule for the Look you saved above.
- Set up your schedule.
 - Choose the webhook delivery type
 - Paste in the URL from Zapier
 - Choose **JSON — Simple, Inline** as your format
 - Test it!

Using our pre-built Zap

Give your schedule a name.

Where should this data go?


1  Webhook

Amazon SageMaker Infer Amazon SageMaker Train: Linear Learner Amazon SageMaker Train: Xgboost

Webhook URL

2

Format data as

3  JSON — Simple, Inline

CSV XLSX JSON — Simple JSON — Detailed, Inline Text HTML

Deliver this schedule

☒ Daily ☐ Weekly ☐ Monthly ☐ Hourly ☐ By minute

Send At

Every day 6 : 00 : AM

Filters Station Station Region is not null Station Total Current Dock Count < 30


Advanced options

Summary: 6:00 AM Daily, JSON — Simple, Inline payload via Webhook

4

Using our pre-built Zap


Click Continue in the “Choose App & Event” step.

 When this happens ...
1. Catch Hook

▼ Choose App & Event

Customize Hook

Custom Webhook URL

 Copy


We've generated a custom webhook URL for you to send requests to. [Learn more about using webhooks.](#)

Silent Mode

☐ Enable to respond with an empty body.

Pick off a Child Key (optional)

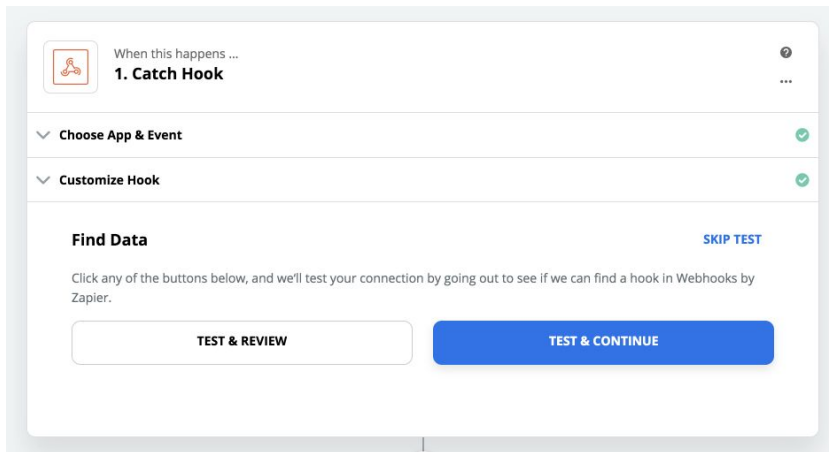
By default, Zapier gives you the entire payload of the webhook. If this is specified, Zapier will only grab the child key from the object sent to Zapier. For example, given `{"contact": {"name": "Mike"}}`, specify `contact` to only trigger on `{"name": "Mike"}`. Traversi ... more

 **Refresh Fields**

CONTINUE

Using our pre-built Zap

Select **Test and Review**.



The screenshot shows the 'Test and Review' step configuration in Zapier. At the top, there's a trigger icon and the text 'When this happens ...' followed by '1. Catch Hook'. Below this are two expandable sections: 'Choose App & Event' and 'Customize Hook', both marked with green checkmarks. The 'Find Data' section contains a 'SKIP TEST' link and instructions to click a button to test the connection. At the bottom, there are two buttons: 'TEST & REVIEW' (outlined) and 'TEST & CONTINUE' (solid blue).

When this happens ...
1. Catch Hook

▼ Choose App & Event ✓

▼ Customize Hook ✓

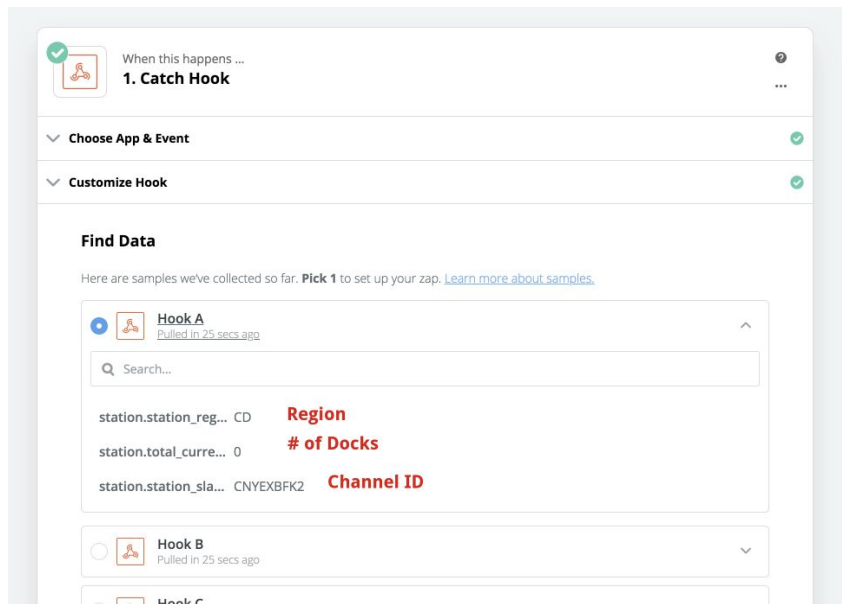
Find Data [SKIP TEST](#)

Click any of the buttons below, and we'll test your connection by going out to see if we can find a hook in Webhooks by Zapier.

TEST & REVIEW **TEST & CONTINUE**

Using our pre-built Zap

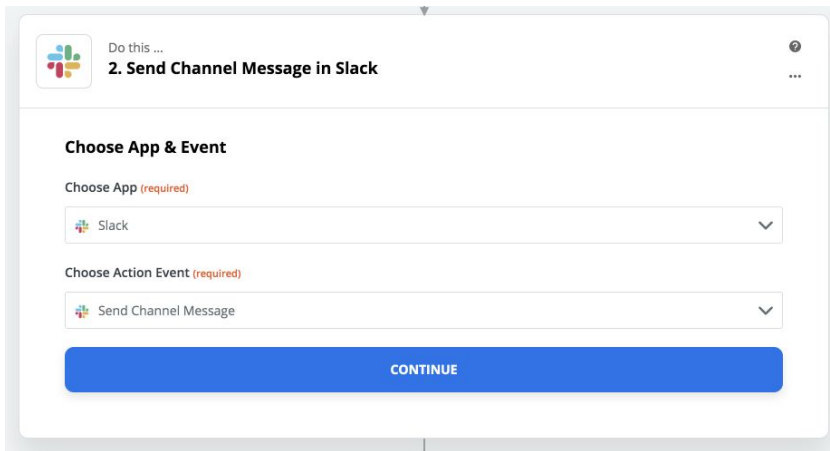
Each sample should have data from only one row of your table, like this:



Using our pre-built Zap

Finish setup in the **Send Channel Message in Slack** step of the Zap.

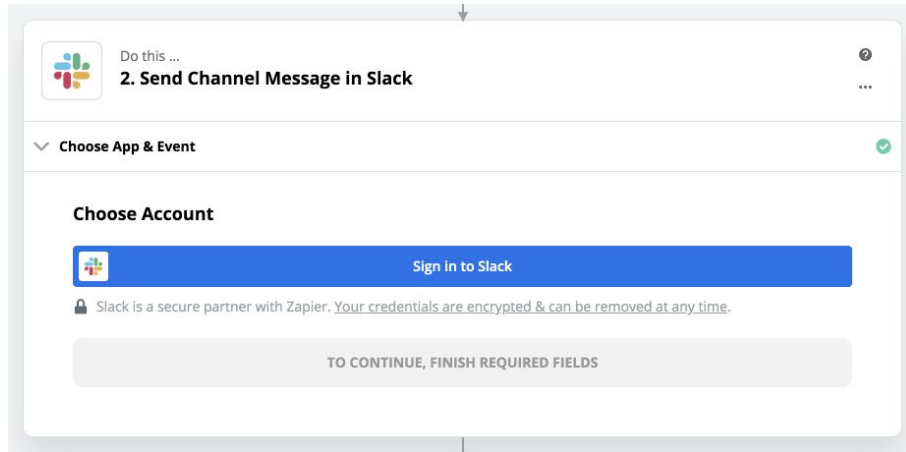
- In a separate tab, make sure you are logged into the **join2019** Slack org
- Open up the **Send Channel Message in Slack** step and click **Continue**



The screenshot shows the configuration interface for the 'Send Channel Message in Slack' step in Zapier. At the top, it says 'Do this ... 2. Send Channel Message in Slack'. Below this, under the heading 'Choose App & Event', there are two dropdown menus. The first is labeled 'Choose App (required)' and has 'Slack' selected. The second is labeled 'Choose Action Event (required)' and has 'Send Channel Message' selected. At the bottom of the configuration area is a large blue button labeled 'CONTINUE'.

Using our pre-built Zap

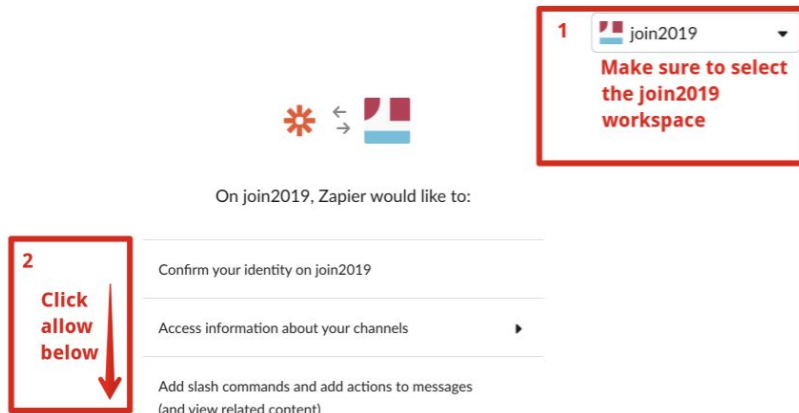
Click **Sign in to Slack** to give Zapier access to the **join2019** Slack workspace.



The screenshot shows a Zapier configuration window for a Zap. At the top, it says "Do this ..." followed by "2. Send Channel Message in Slack". Below this is a section titled "Choose App & Event" with a green checkmark. Underneath is a "Choose Account" section. A blue button labeled "Sign in to Slack" is prominently displayed. Below the button, there is a small lock icon and the text: "Slack is a secure partner with Zapier. [Your credentials are encrypted & can be removed at any time.](#)". At the bottom of the window, there is a grey button that says "TO CONTINUE, FINISH REQUIRED FIELDS".

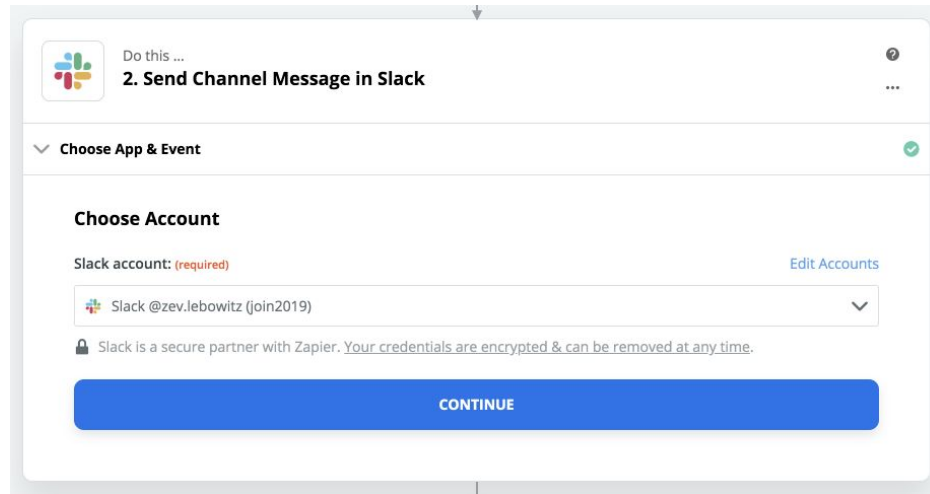
Using our pre-built Zap

Make sure to choose the **join2019** workspace (as opposed to your corporate or other workspaces you belong to) and click **Allow** at the bottom of the page.



Using our pre-built Zap

Click **Continue**.



The screenshot shows the Zapier configuration interface. At the top, the Slack logo is next to the text "Do this ... 2. Send Channel Message in Slack". Below this is a section titled "Choose App & Event" with a green checkmark. Underneath, there is a "Choose Account" section. It says "Slack account: (required)" and has a link "Edit Accounts". A dropdown menu shows "Slack @zev.lebowitz (join2019)". Below the dropdown, there is a lock icon and the text "Slack is a secure partner with Zapier. Your credentials are encrypted & can be removed at any time." At the bottom of the form is a large blue button labeled "CONTINUE".

Using our pre-built Zap

Under **Channel**, select **Use a Custom Value (advanced)**.

The screenshot shows the Zapier configuration interface for the action '2. Send Channel Message in Slack'. The 'Channel' field is required and has a dropdown menu. A red arrow labeled '2' points to the dropdown arrow. The dropdown menu is open, showing a search bar with 'custom' entered. A red arrow labeled '1' points to the 'Use a Custom Value (advanced)' option, which is highlighted with a red box. Other options in the dropdown include 'Check Slack & reload to bring in new choices.', 'Other Options', and 'Clear Current Choice'. The 'yes' option is selected at the bottom of the dropdown.

Do this ...
2. Send Channel Message in Slack

✓ Choose App & Event

✓ Choose Account

Customize Channel Message

Channel (required)

Pick a channel...

custom

Check Slack & reload to bring in new choices.

Other Options

Use a Custom Value (advanced)

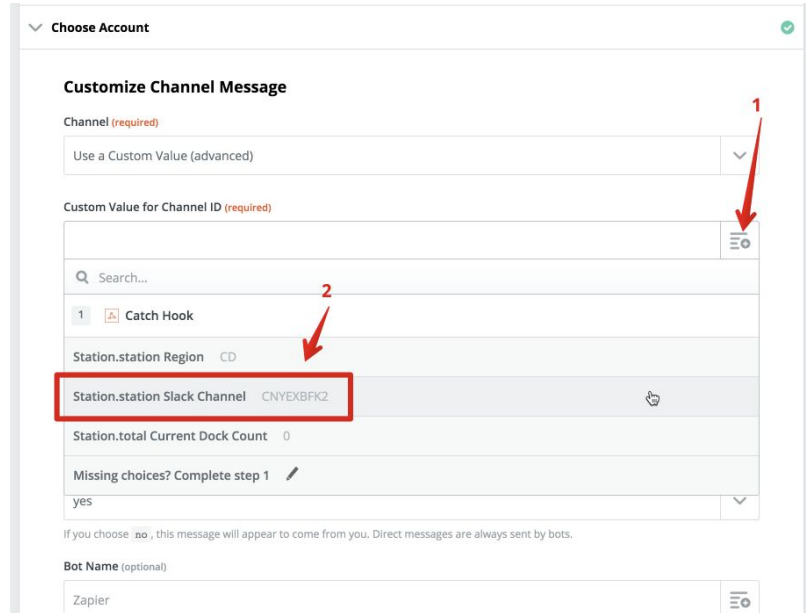
Clear Current Choice

yes

If you choose **no**, this message will appear to come from you. Direct messages are always sent by bots.

Using our pre-built Zap

In **Custom Value for Channel ID**, click the selector on the right side of the input box to fill the field with the **Station.station Slack Channel**.



Choose Account

Customize Channel Message

Channel (required)

Use a Custom Value (advanced)

Custom Value for Channel ID (required)

Search...

1 Catch Hook

Station.station Region CD

Station.station Slack Channel CNYXBFK2

Station.total Current Dock Count 0

Missing choices? Complete step 1

yes

If you choose no, this message will appear to come from you. Direct messages are always sent by bots.

Bot Name (optional)

Zapier

Using our pre-built Zap

Customize the message with something unique so you can tell yours apart from everyone else's when it gets sent to Slack.

▼ Choose Account

Customize Channel Message

Channel (required)

Use a Custom Value (advanced)

Custom Value for Channel ID (required)

1. Station.station Slack Channel: CNYEXBFK2

Provide the Channel ID, not the Name here. Not sure how to use custom values? [Learn more here.](#)
If you use a Custom Value, you can also use the channel name instead of its ID.

Message Text (required)

Hey 1. Station.station Region: CD regional team
You only have 1. Station.total Current Dock Count: 0 available docks today!
[Sending from Zev's sample Zap!]

Specify text of the message to send. Check out the [formatting help doc](#) for advanced options.

Send as a bot? (optional) ☒

Using our pre-built Zap

Click **Continue**.

If you get the message from a trigger, select "use a custom value" from the dropdown and [connect](#) accordingly. ... more

Broadcast To Channel? (optional) ● ○

no ▼

If true, posts in the thread and channel. See [here](#) for more info. Ignored unless the message is part of a thread.

🔄 Refresh Fields

CONTINUE

+

Using our pre-built Zap

Click **Continue**.

If you get the message from a trigger, select "use a custom value" from the dropdown and [connect](#) accordingly. ... more

Broadcast To Channel? (optional) ● ○

no ▼

If true, posts in the thread and channel. See [here](#) for more info. Ignored unless the message is part of a thread.

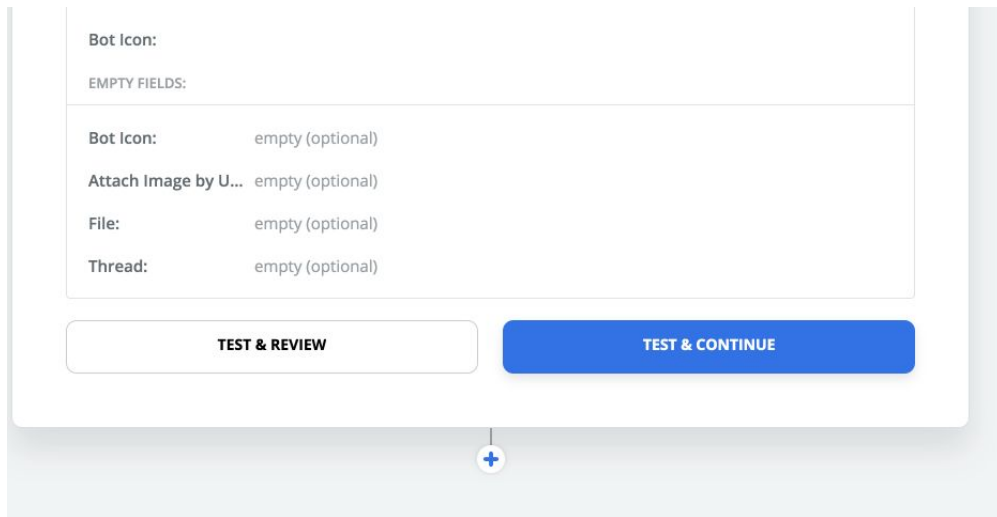
🔄 Refresh Fields

CONTINUE

+

Using our pre-built Zap

Click **Test & Review** to send the message to Slack.



The screenshot shows a configuration window for a Zap. At the top, it says 'Bot Icon:' followed by 'EMPTY FIELDS:'. Below this is a table with four rows, each with a label and a value: 'Bot Icon:' with 'empty (optional)', 'Attach Image by U...' with 'empty (optional)', 'File:' with 'empty (optional)', and 'Thread:' with 'empty (optional)'. At the bottom of the window are two buttons: 'TEST & REVIEW' (white with a black border) and 'TEST & CONTINUE' (solid blue). A small blue plus icon is visible below the buttons.

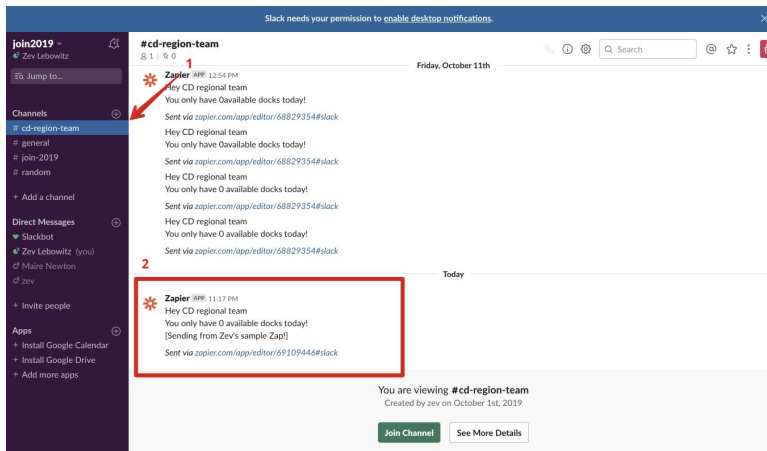
EMPTY FIELDS:	
Bot Icon:	empty (optional)
Attach Image by U...	empty (optional)
File:	empty (optional)
Thread:	empty (optional)

TEST & REVIEW **TEST & CONTINUE**

Using our pre-built Zap

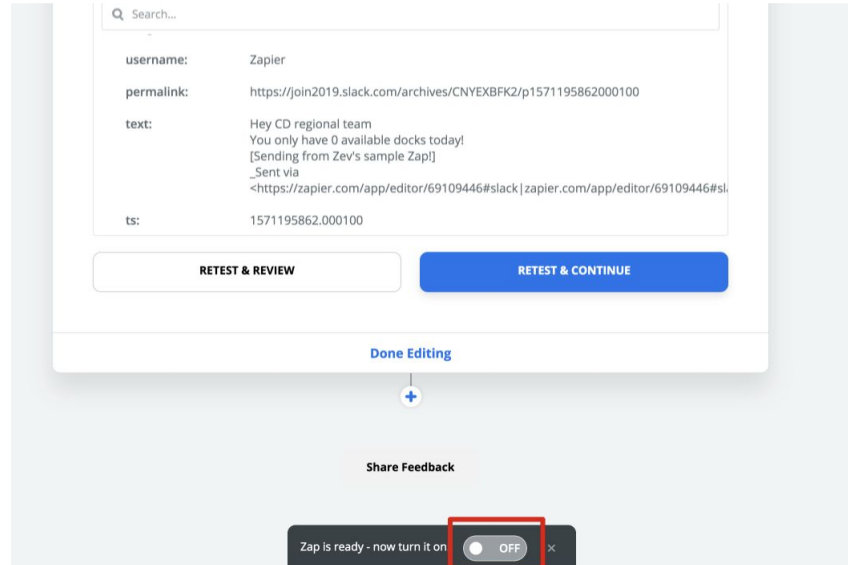
Navigate back to Slack and see if your message was sent!

- Find the channel your message was sent to (based on the region for the sample you built your Zap with)
- Make sure to look for the message with your customized message



Using our pre-built Zap

Back in Zapier, turn on your Zap!



Using our pre-built Zap

Go back to Looker to send a test of your scheduled Look into Zap.

The screenshot displays the Zapier configuration page for a scheduled Look. At the top, there are three tabs: 'Infer', 'Train: Linear Learner', and 'Train: Xgboost'. Below these, the 'Webhook URL' field contains the address `https://hooks.zapier.com/hooks/catch/5659611/ou4h4xh/`. The 'Format data as' section offers several options: CSV, XLSX, JSON — Simple, JSON — Simple, Inline (which is selected and circled in blue), JSON — Detailed, Inline, Text, and HTML. The 'Deliver this schedule' section has radio buttons for Daily (selected), Weekly, Monthly, Hourly, and By minute. Below this, the 'Send' frequency is set to 'Every day' and the 'At' time is set to '6 : 00 : AM'. A 'Filters' section shows a condition: 'Station Station Region is not null Station Total Current Dock Count < 30'. An 'Advanced options' section is also visible. At the bottom, a summary bar states: 'Summary: 6:00 AM Daily, JSON — Simple, Inline payload via Webhook'. A red rectangular box highlights the 'Send Test' button in the bottom right corner of the configuration area.

Building your own Zap from scratch

Building your own Zap from scratch

Set up your Zap

- Open up Zapier and create a new Zap
- Select **Webhooks by Zapier** as the action that will trigger your Zap
- Choose the **Cath hook** option
- Copy the webhook URL to your clipboard
- In the **Pick off a Child Key** box, input **data**

Building your own Zap from scratch

Set up a scheduled webhook from Looker

- Save a Look based on this Explore query, which returns all bike share docs that have fewer than 5 bikes
- Save + Schedule
- Set up your schedule
 - Choose the webhook delivery type (NOTE: Do not use the Zapier delivery type, as it doesn't send in the right format to split each row into a separate message from Zapier)
 - Choose **Inline — JSON (Simple)** as your format
 - Paste in the URL
 - Test it!

Building your own Zap from scratch

Finish setting up your Zap — proceed to **Test and view** the webhook.

- Each sample should have data from only one row of your table
- If you see more than just 3 elements (channel ID, region, # of bikes), go back and make sure you put **data** in the **Pick off a Child Key** box in the last step

Building your own Zap from scratch

Send the data from that row into a Slack channel.

- Select Slack
- Choose **Send channel message**
- In a separate tab, make sure you are logged into the **join2019** Slack org
- Connect Zapier to a new Slack org
- Make sure you are giving Zapier access to the **join2019** Slack org in the top right corner of the page

Building your own Zap from scratch

- Continue to customize your Slack message
- On channel, scroll to the bottom to select **Custom Channel**, so that each row of the table gets sent to the appropriate region's Slack channel
- In the **Channel ID** field, click on the **+** icon on the right of the input box to select the **Channel ID** field from the webhook step
- Write your message! You probably want to include information from the webhook step, like the number of available docks. (Make sure to put something unique in the message so you can tell yours apart from everyone else's.) Here's what we wrote:
- Test it

Building your own Zap from scratch

- Take a look in the Slack channel to see if your message showed up.
- Once you've tested all of the steps, you can turn on your Zap!
- Go back to Looker to send a test of your scheduled Look into Zapier.
- Back in Slack, you should now see one message per row in your Look, each sent to the appropriate channel.

Questions?





looker





Thank you

Rate this session in
the JOIN mobile app