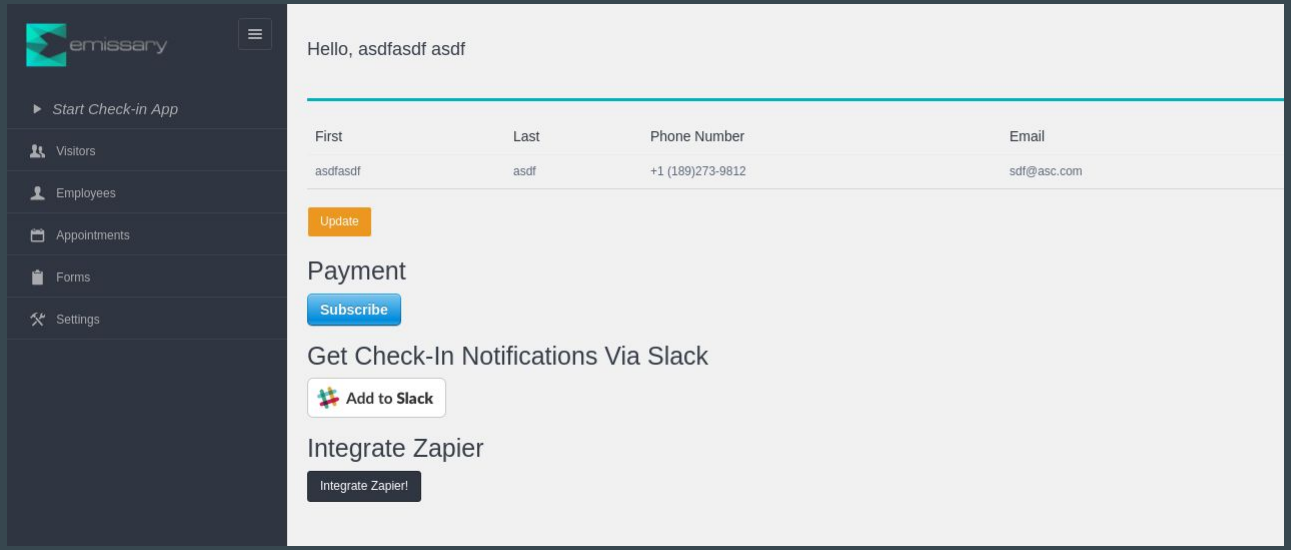
Zapier Integration

...

Linking Zapier

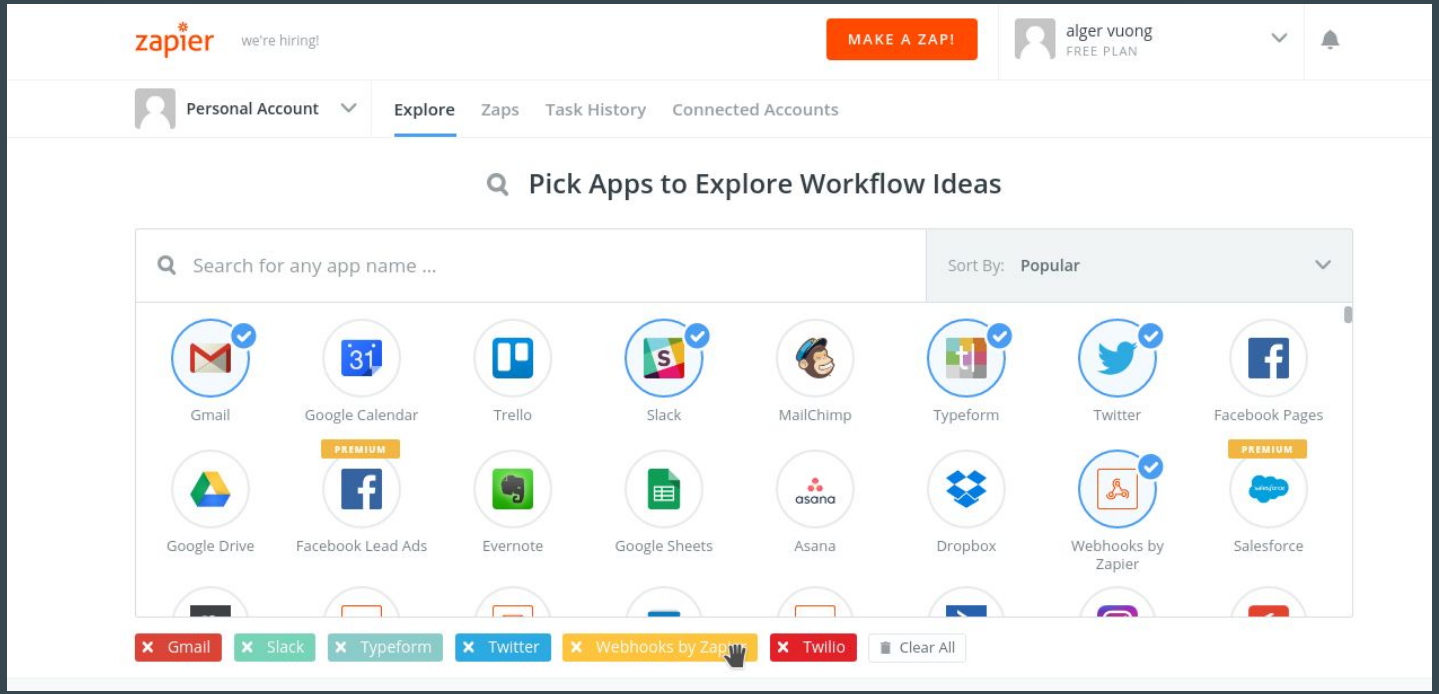
- 1. Login/Register to the application
- 2. Go to Settings



- Click Integrate Zapier

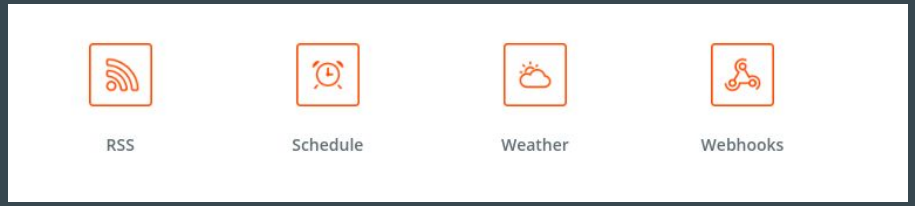
Zapier Setup

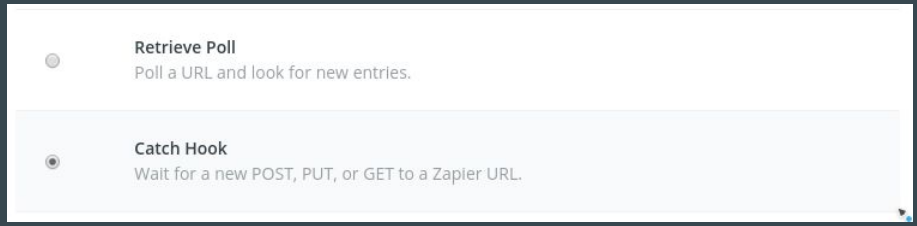
- Click Make a Zap!



Zapier Setup (cont.)

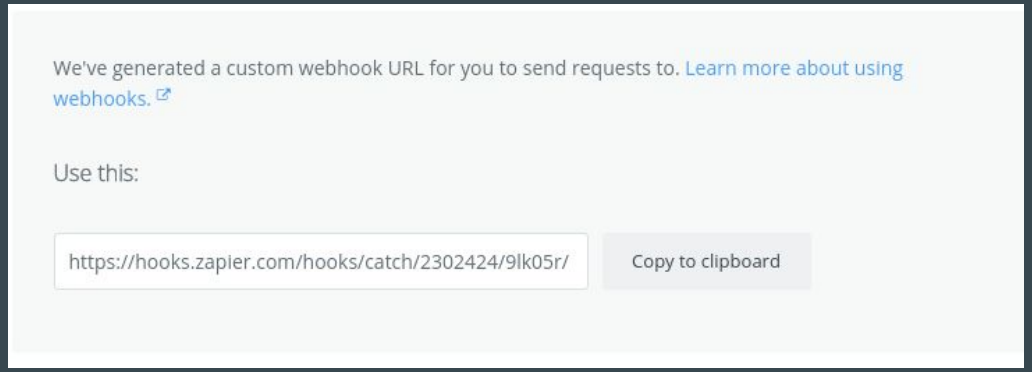
- Select ‘Webhooks’ as the trigger
- Select the ‘Catch Hook’ option
- Continue until url is available





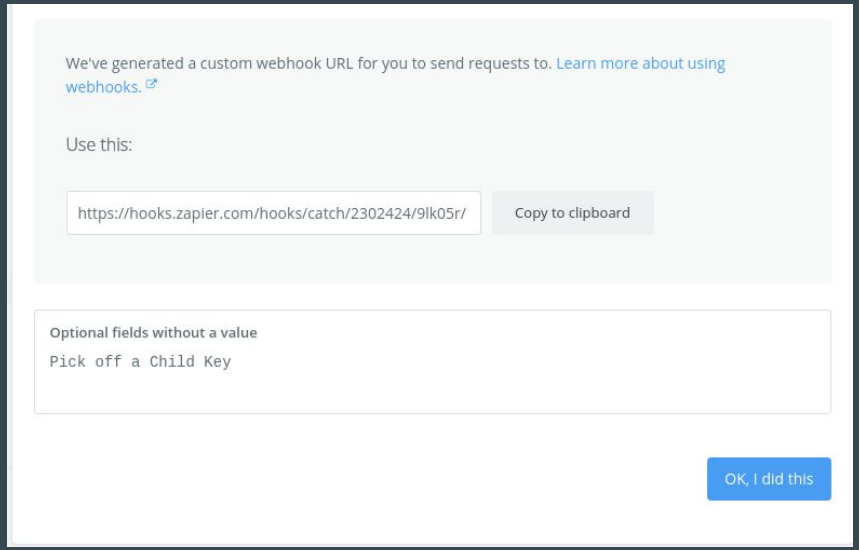
Zapier Setup (cont.)

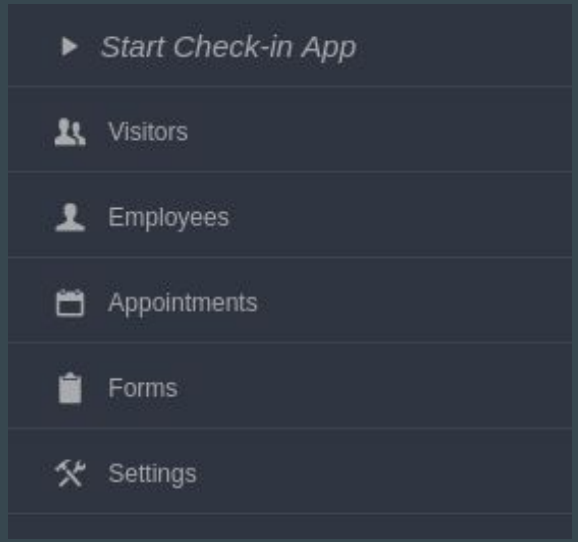
- Copy Zapier URL
- Paste URL into settings
- Save Changes
- Once saved, move to next step



Zapier Setup (cont.)

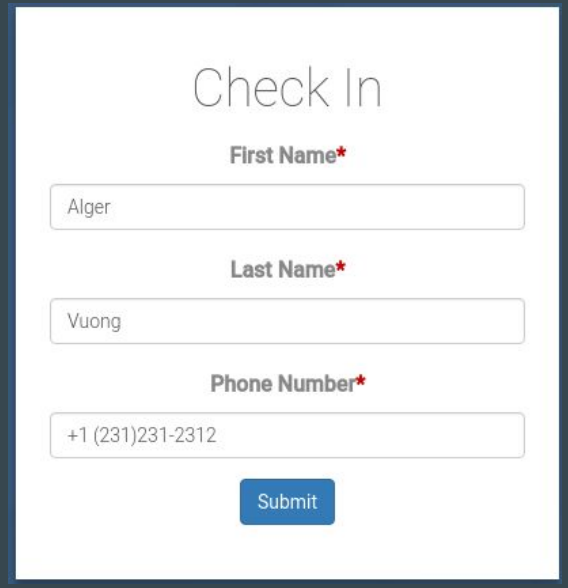
- Return to Zapier setup
- Click ‘Ok, I did this’
- Return to app, select ‘Start Check-in App’



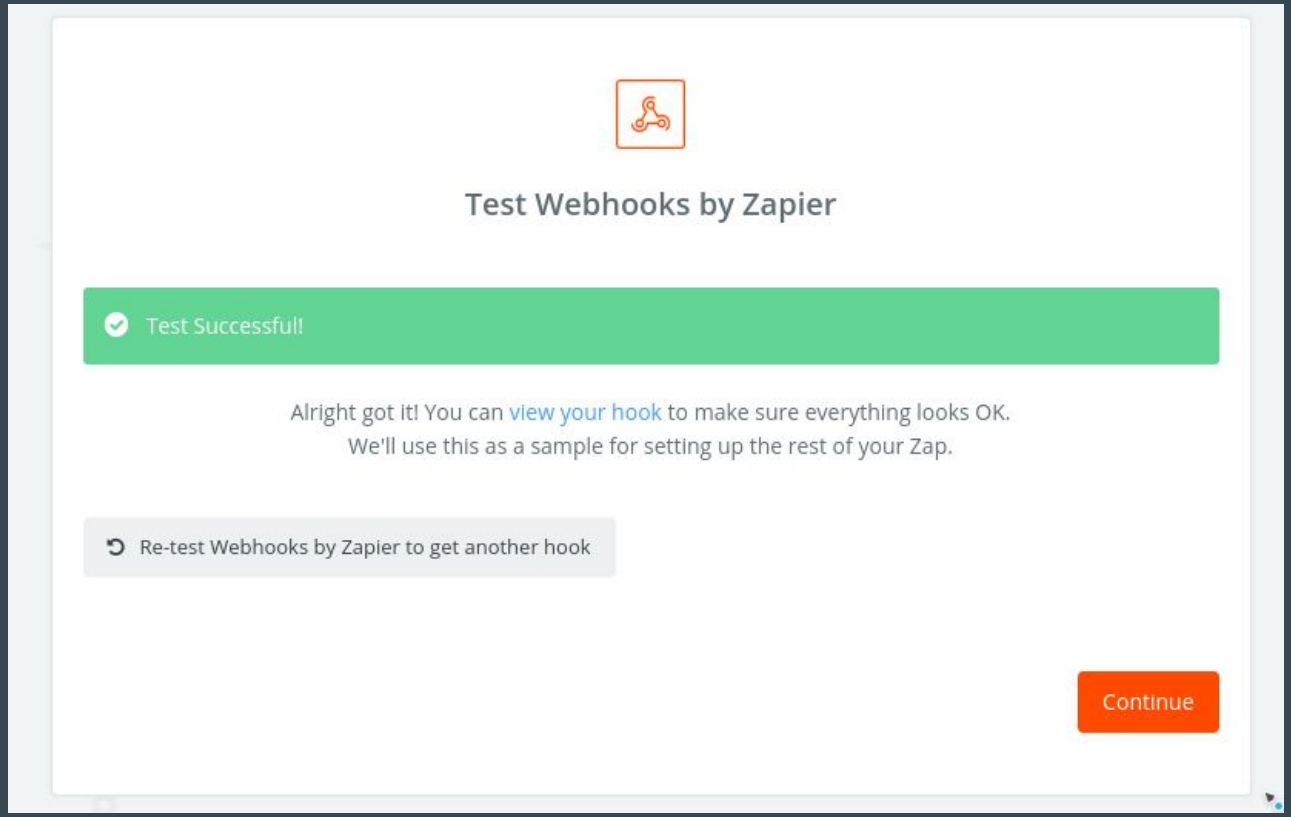


Zapier Setup (cont.)

- Fill out and submit check-in form



Zapier Integration Complete!



Zapier Slack Example

- Select Slack Application
- Fill out settings for slack and link account to Zapier
- Note: The message is the payload from POST request from our server so other fields can also be passed to Zapier (e.g. email, phone #, etc.)

Select Slack Action

Search Slack Actions...

CREATE

Send Channel Message
Post a new message to a specific #channel you choose.

Send Direct Message
Send a direct message to a user or yourself from the Slackbot.

Add Reminder
Adds a reminder for yourself or a teammate, just like the `/remind` slash command.

Select Slack Account

Slack Account #1
(added 3 days, 18 hours ago)

Test

Connect a New Account

Continue

Set up Slack Channel Message

Channel (required)

general

Message Text (required)

Specify text of the message to send. Check out the formatting help doc for advanced options.

Step 1 **Message**

Send as a Bot? (optional)

If you choose `no`, this message will appear to come from you. You *must* first follow these steps if you choose `no`.

yes

Bot Name (optional)

Specify the bot name which appears as a bold username above the message inside Slack. Defaults to `bot`.

bot

Test Slack

To test Slack, we need to create a new channel message. This is what will be created:

Channel

general

Message Text

Alger Vuong has just checked in.

Send as a Bot?

yes

Bot Name

bot

Broadcast to Channel?

no

Auto-Expand Links?

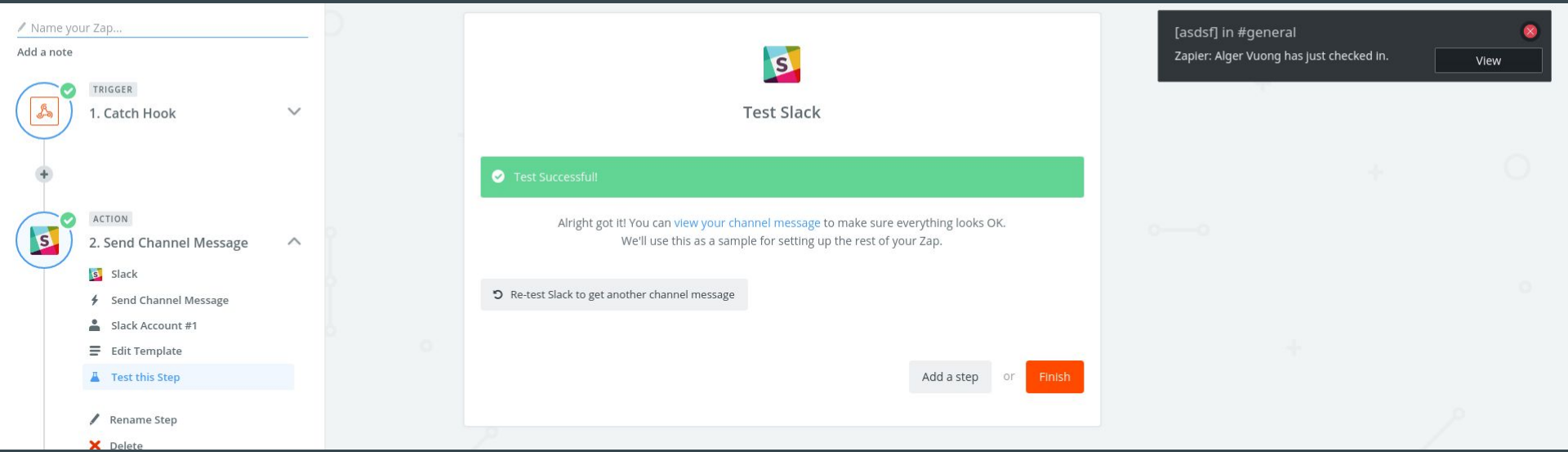
yes

Send @Mention Notifications?

yes

Optional fields without a value

Bot Icon Emoji
Bot Icon URL
Thread
Attach Image by URL


Name your Zap...
Add a note
TRIGGER
1. Catch Hook
ACTION
2. Send Channel Message
Slack
Send Channel Message
Slack Account #1
Edit Template
Test this Step
Rename Step
Delete
Test Slack
Test Successful!
Alright got it! You can view your channel message to make sure everything looks OK.
We'll use this as a sample for setting up the rest of your Zap.
Re-test Slack to get another channel message
Add a step
or
Finish
[asdsf] in #general
Zapier: Alger Vuong has just checked in.
View

Zapier

- Zapier currently linked to checkin
- Webhook is triggered by a new visitor checking in