

## Lesson 02 Demo 11

### Setting Up a Zapier Account and Creating a Zap

**Objective:** To demonstrate how to set up a Zapier account and create a Zap

**Tools required:** Zapier

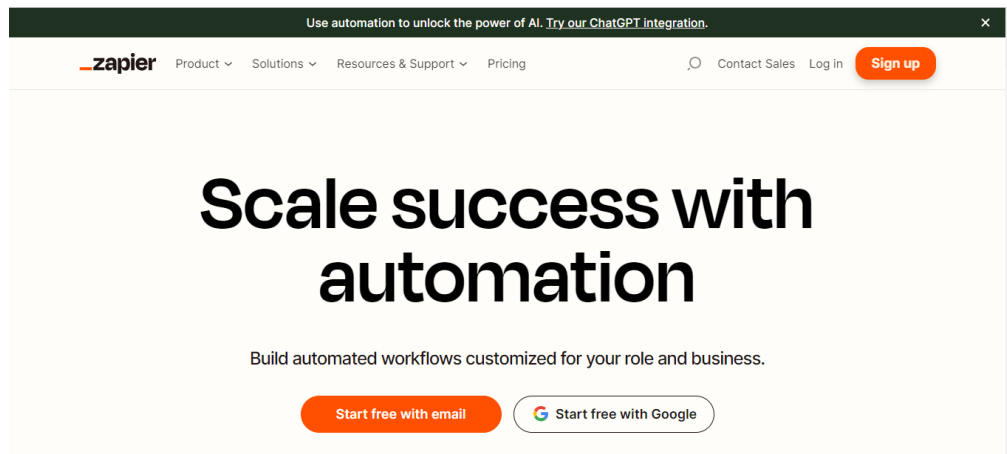
**Prerequisites:** None

Steps to be followed:

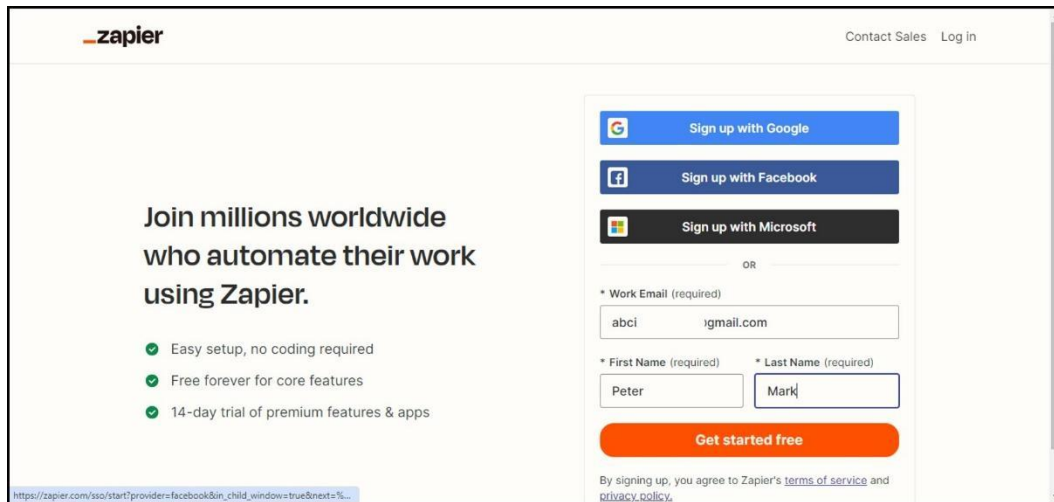
1. Set up a Zapier account
2. Create a Zap

#### Step 1: Set up a Zapier account

1.1 Go to Zapier.com and click on **Sign up**



## 1.2 Enter the credentials



The image shows the Zapier sign-up page. On the left, there is a heading "Join millions worldwide who automate their work using Zapier." followed by three bullet points: "Easy setup, no coding required", "Free forever for core features", and "14-day trial of premium features & apps". On the right, there are three social login buttons: "Sign up with Google", "Sign up with Facebook", and "Sign up with Microsoft". Below these is an "OR" separator. Then, there is a form for "Work Email (required)" with the text "abc@gmail.com" and two fields for "First Name (required)" with "Peter" and "Last Name (required)" with "Mark". A large orange button labeled "Get started free" is below the form. At the bottom, a small text says "By signing up, you agree to Zapier's [terms of service](#) and [privacy policy](#)."

zapier Contact Sales Log in

Join millions worldwide who automate their work using Zapier.

- ✓ Easy setup, no coding required
- ✓ Free forever for core features
- ✓ 14-day trial of premium features & apps

Sign up with Google

Sign up with Facebook

Sign up with Microsoft

OR

\* Work Email (required)

abc@gmail.com

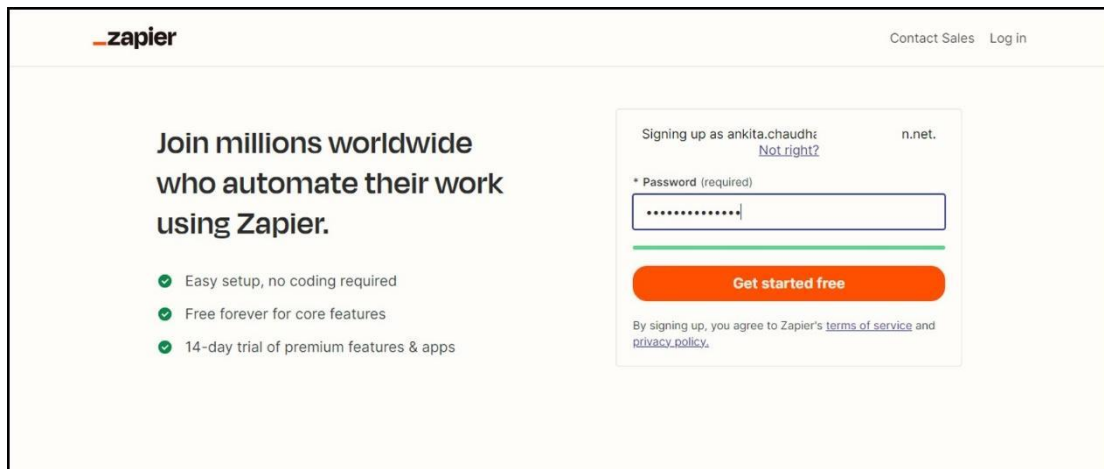
\* First Name (required) \* Last Name (required)

Peter Mark

Get started free

By signing up, you agree to Zapier's [terms of service](#) and [privacy policy](#).

## 1.3 Enter the Password



The image shows the Zapier sign-up page at the password entry step. On the left, the same heading and bullet points are present. On the right, the social login buttons are gone. Instead, there is a heading "Signing up as ankita.chaudhary@gmail.com" with a link "Not right?" and a text "n.net.". Below this is a form for "Password (required)" with a masked password field. A large orange button labeled "Get started free" is below the form. At the bottom, the same small text about terms of service and privacy policy is present.

zapier Contact Sales Log in

Join millions worldwide who automate their work using Zapier.

- ✓ Easy setup, no coding required
- ✓ Free forever for core features
- ✓ 14-day trial of premium features & apps

Signing up as ankita.chaudhary@gmail.com [Not right?](#) n.net.

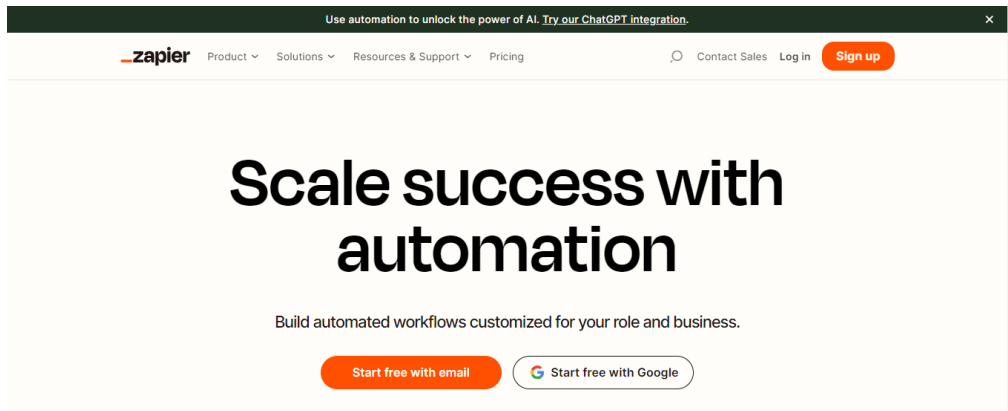
\* Password (required)

\*\*\*\*\*

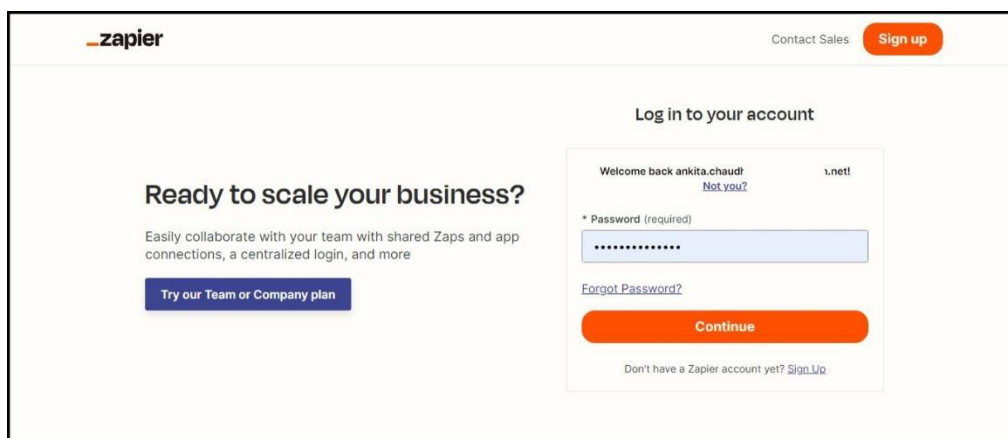
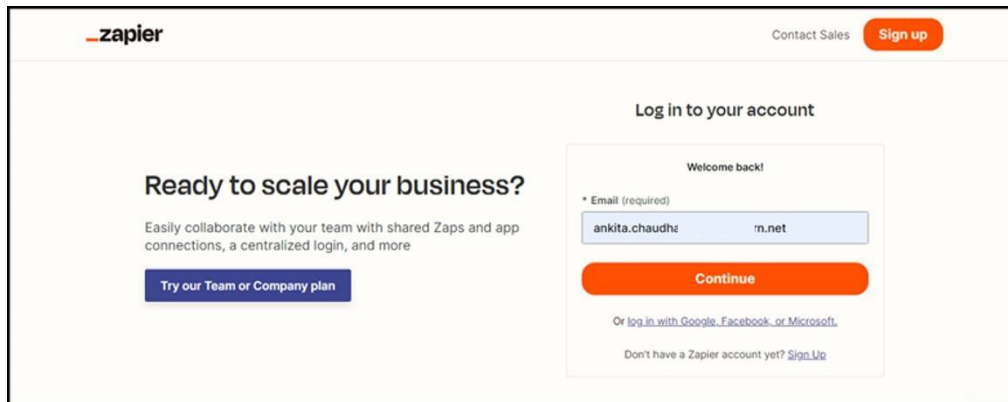
Get started free

By signing up, you agree to Zapier's [terms of service](#) and [privacy policy](#).

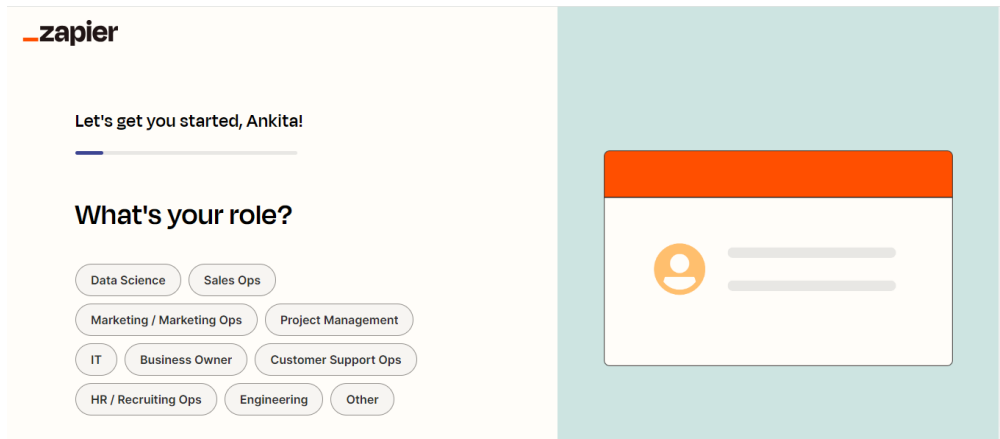
#### 1.4 Click on **Log in** next to the **Sign up** button



#### 1.5 Enter the **Email** and **Password** and click on **Continue**



## 1.6 Choose your user role



**zapier**

Let's get you started, Ankita!

**What's your role?**

Data Science Sales Ops

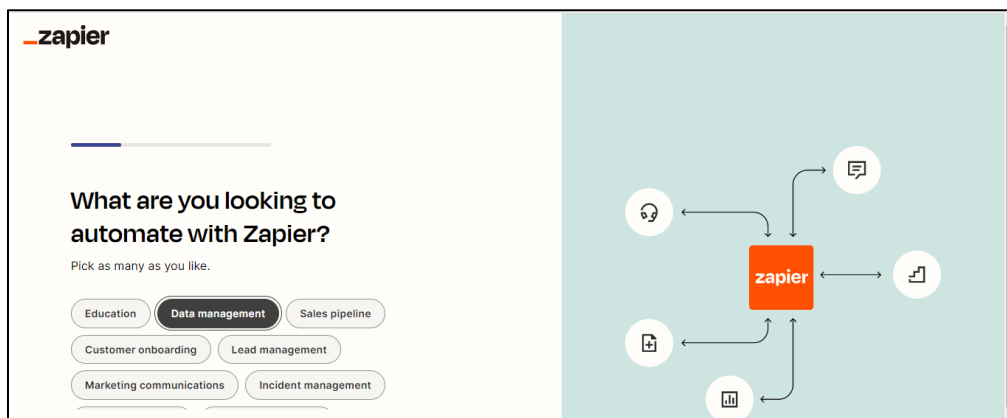
Marketing / Marketing Ops Project Management

IT Business Owner Customer Support Ops

HR / Recruiting Ops Engineering Other

The right side of the screen shows a light blue background with a white rectangular box containing an orange circle icon with a person silhouette and two horizontal lines for text input.

## 1.7 Select the option that needs to be automated with Zapier



**zapier**

**What are you looking to automate with Zapier?**

Pick as many as you like.

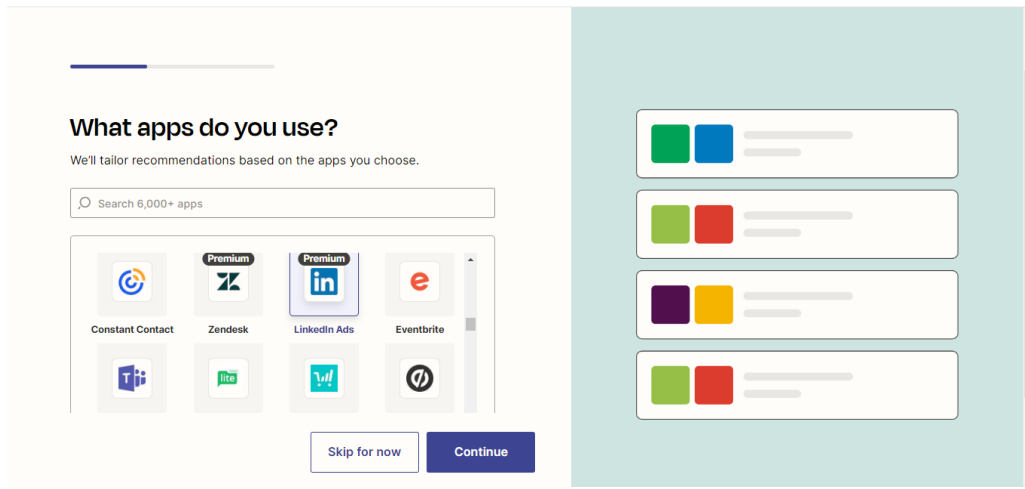
Education **Data management** Sales pipeline

Customer onboarding Lead management

Marketing communications Incident management

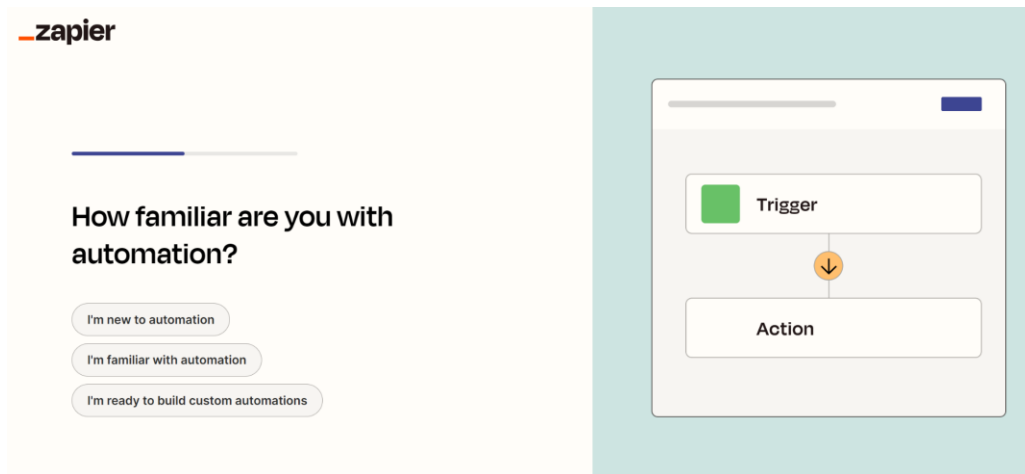
The right side of the screen shows a light blue background with a central orange square labeled 'zapier'. Six circular icons are arranged around it, each with a double-headed arrow pointing to the central square: a headset (top left), a speech bubble (top right), a bar chart (middle right), a document with a plus sign (bottom right), a document with a checkmark (bottom left), and a gear (middle left).

## 1.8 Select the apps you want to use



The screenshot shows the Zapier app selection interface. On the left, a light orange panel contains the heading "What apps do you use?" and a subtext "We'll tailor recommendations based on the apps you choose." Below this is a search bar labeled "Search 6,000+ apps". A grid of app icons is displayed, including Constant Contact, Zendesk, LinkedIn Ads (marked Premium), Eventbrite, Microsoft Teams, and others. At the bottom of this panel are "Skip for now" and "Continue" buttons. On the right, a light teal panel shows a vertical stack of four app selection cards, each with two colored squares and a text input field.

## 1.9 Choose the option that best reflects how familiar you are with automation



The screenshot shows the Zapier familiarity selection screen. The Zapier logo is at the top left. The heading "How familiar are you with automation?" is centered. Below it are three radio button options: "I'm new to automation", "I'm familiar with automation", and "I'm ready to build custom automations". On the right, a light teal panel displays a visual representation of a Zap workflow, showing a "Trigger" box connected by a downward arrow to an "Action" box.

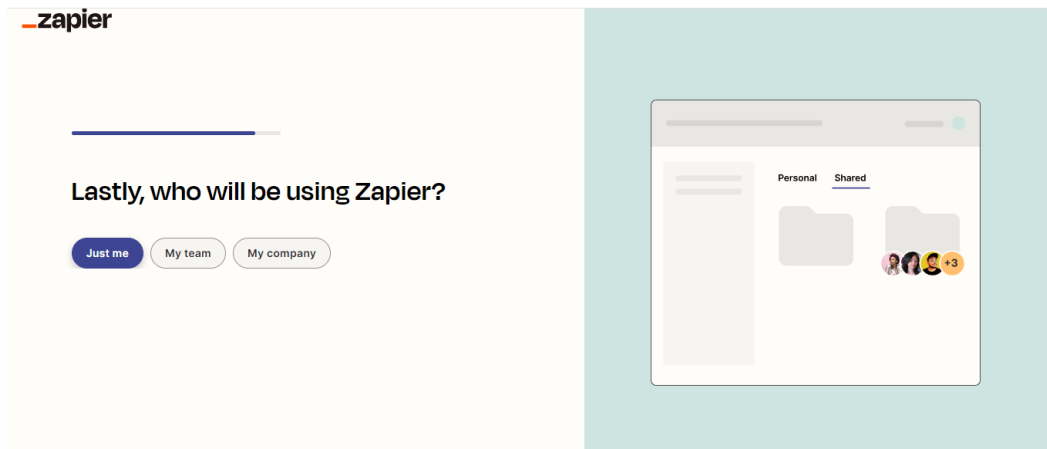
### 1.10 Select the company size

The image shows the Zapier logo on the left, which consists of an orange horizontal bar followed by the word "zapier" in lowercase black font. To the right of the logo is a form titled "What's your company size?". Below the title are four rounded rectangular buttons labeled "1-49", "50-249", "250-999", and "1,000+". The button "1-49" is highlighted with a blue border. On the far right, there is a large teal-colored area containing a diagram of three stacked boxes. Each box contains person icons representing team members. The top box has one icon, the middle box has three icons, and the bottom box has four icons.

### 1.11 Select the job level

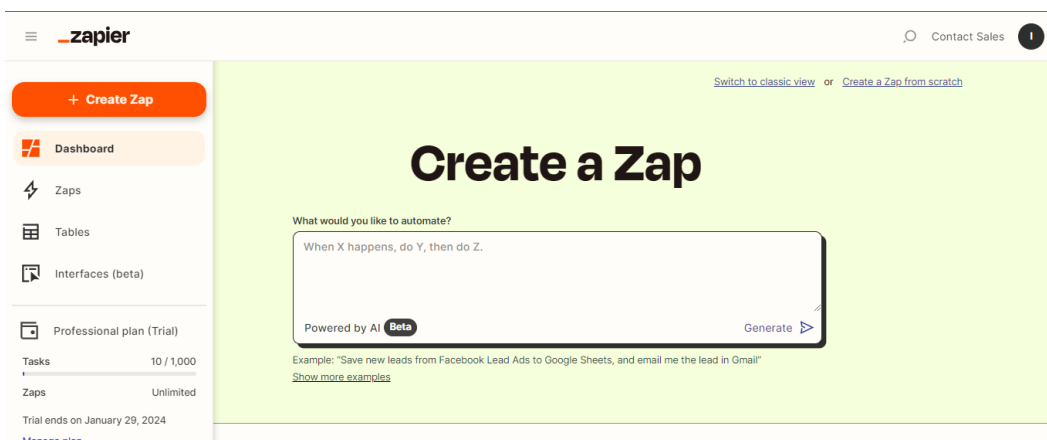
[illegible]

1.12 Select who will be using Zapier; in this case, select the **Just me** option

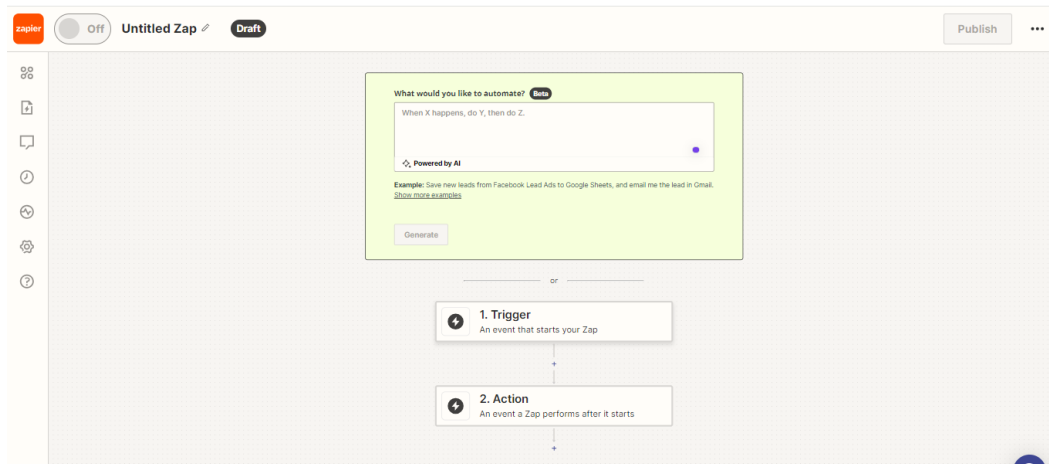


## Step 2: Create a Zap

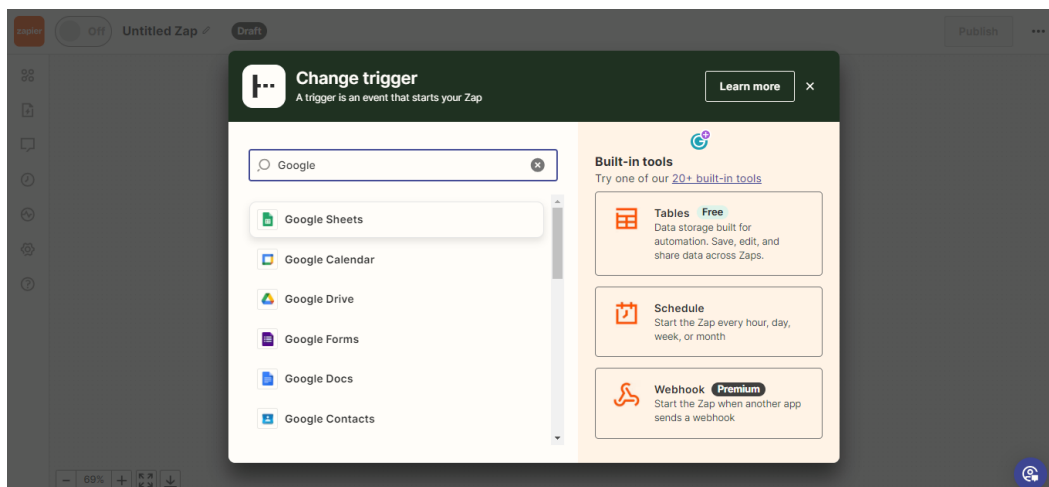
2.1 Navigate to the Zapier dashboard and click on **+ Create Zap**



## 2.2 Click on **Trigger**

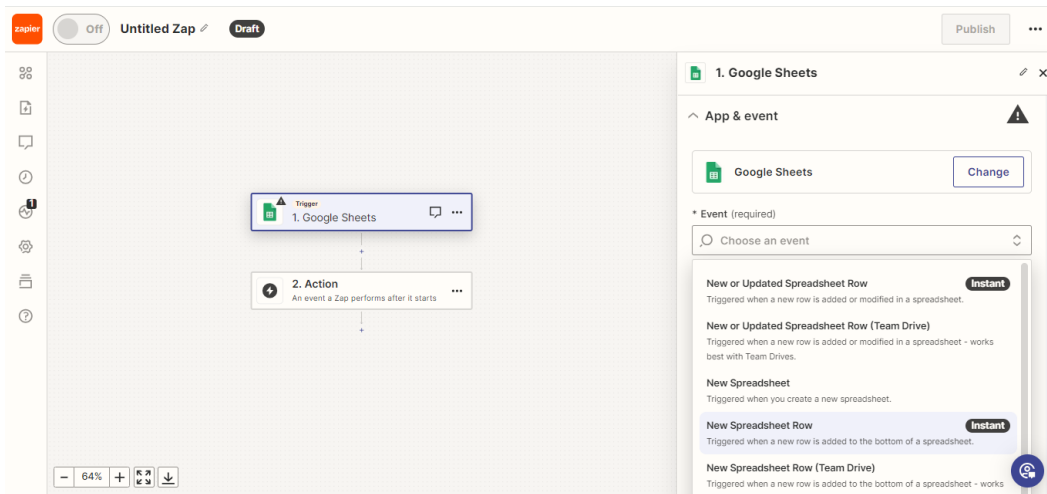


## 2.3 In the **Change trigger** page, search for and select **Google Sheets** in the search bar

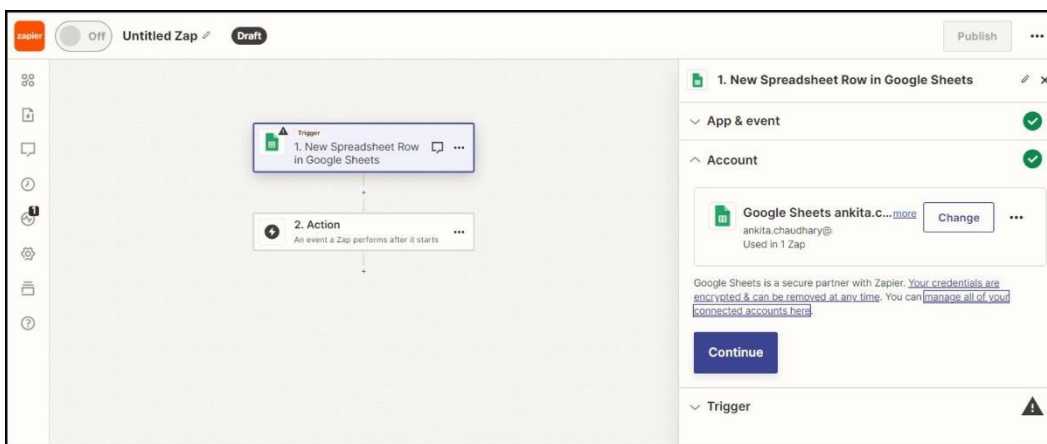
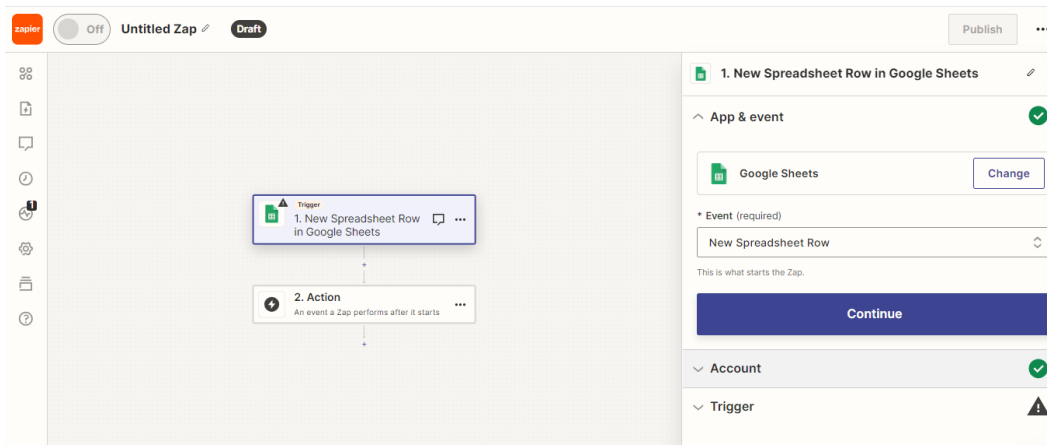


## 2.4 Under **Event** on the right panel, search and select **New Spreadsheet Row**

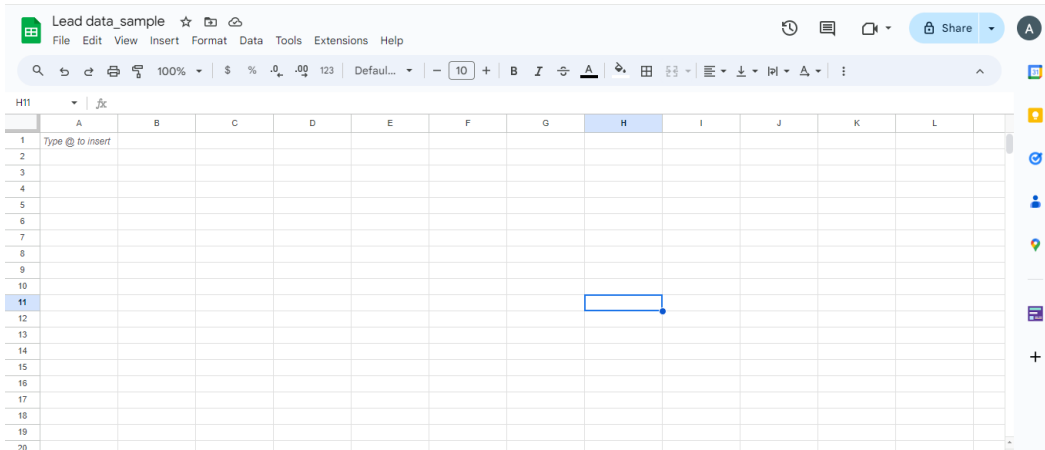




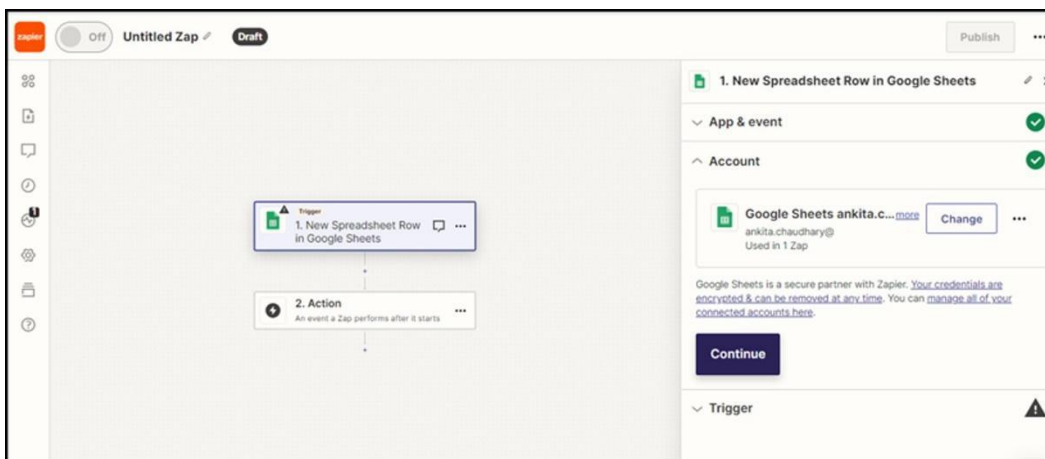
2.5 Click on **Account** and then select the Google account



2.6 Before selecting the next step, go to your Google Drive and make a spreadsheet with the name **Lead data\_sample**



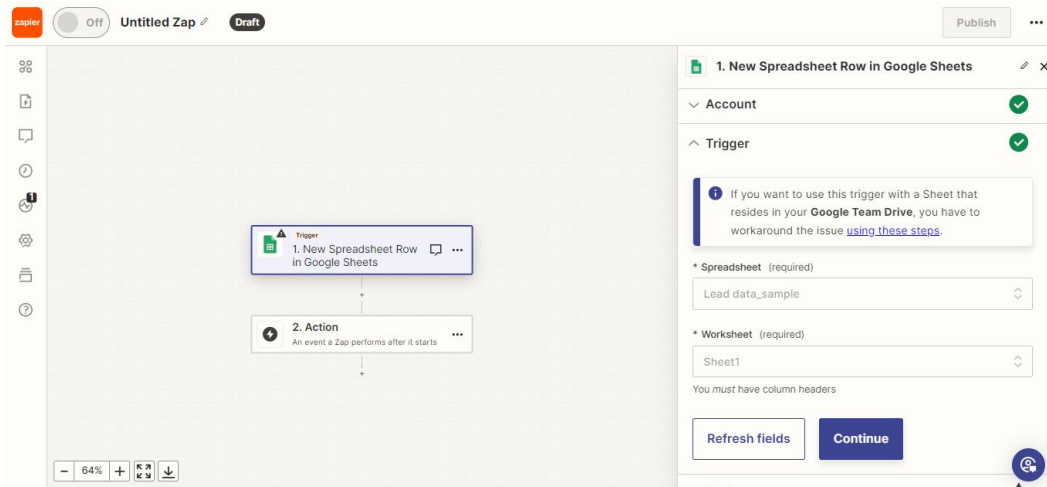
2.7 Once your account is connected, select **Continue**



2.8 Under **Spreadsheet**, select **Lead data\_sample**

This shall appear automatically, as your Google Sheets is linked to your Google Drive account.

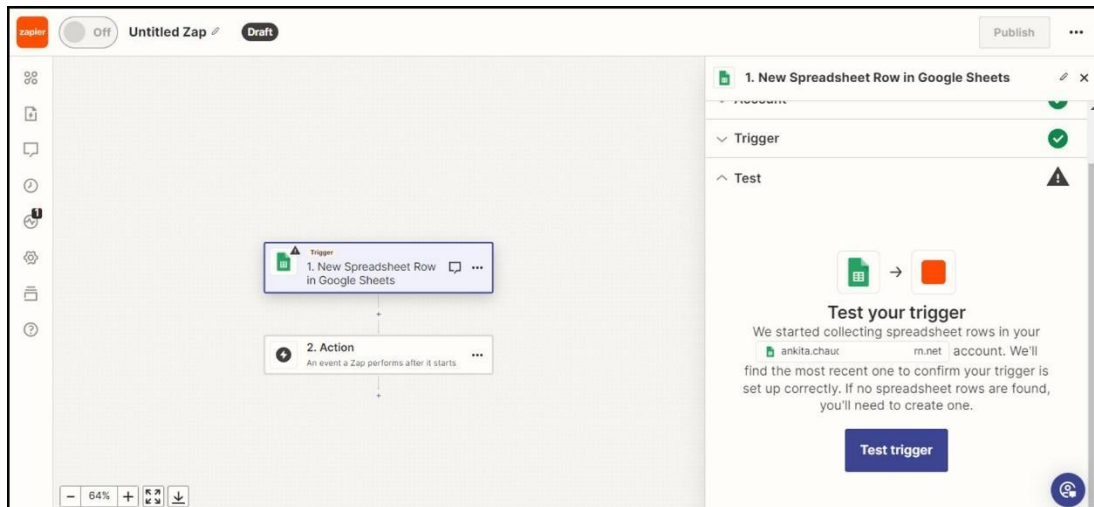
In **Worksheet**, select **Sheet 1**.



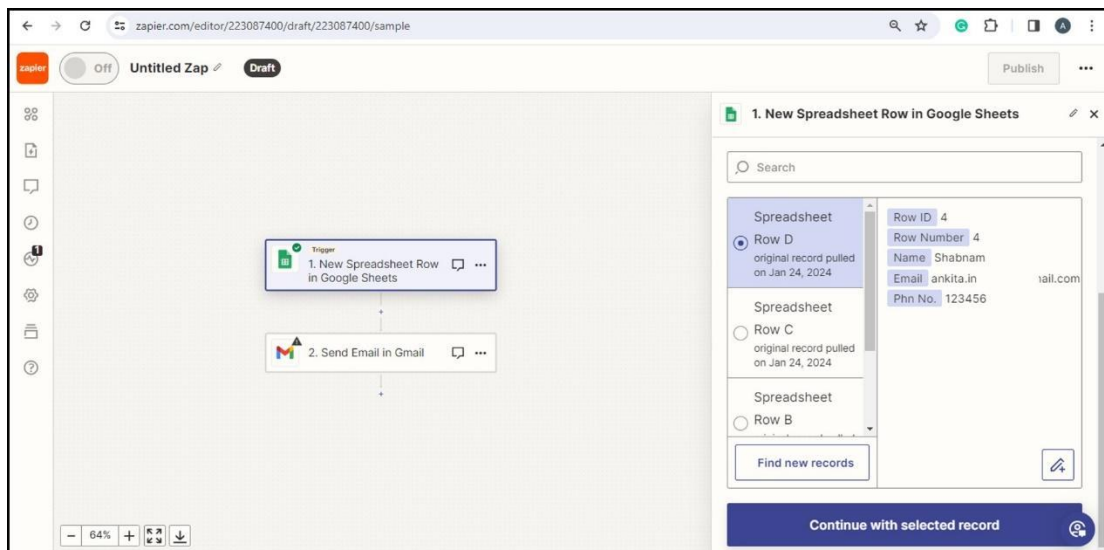
2.9 Fill up a sample data in the spreadsheet, **Lead data\_sample**

	A	B	C	D	E	F
1	Name	Email	Phn No.			
2	Ankita	ankita.cha@arn.net	8989898989			
3	Tess	tess.math@n.net	99999999			
4	Shabnam	ankita.in@iil.com	123456			
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						

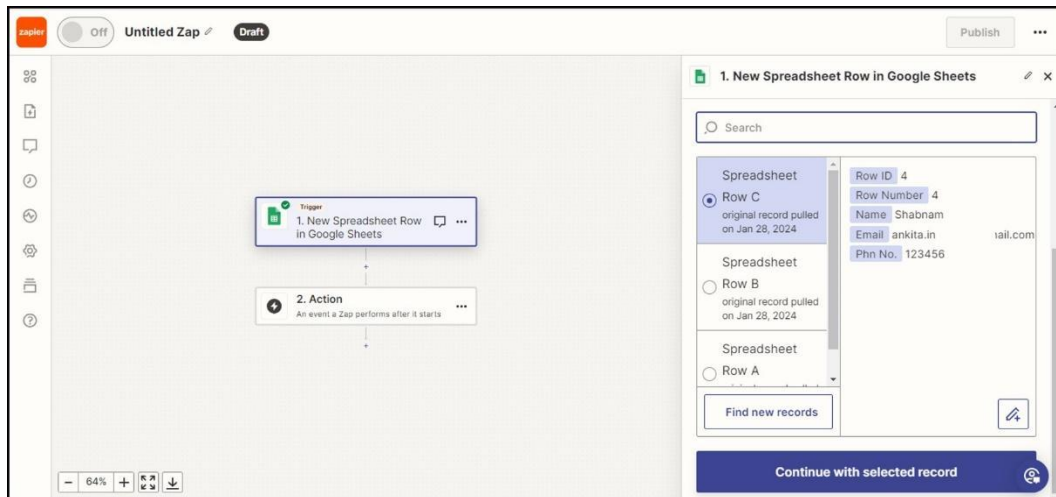
2.10 Click the **Test trigger** button to show the row data on Zapier



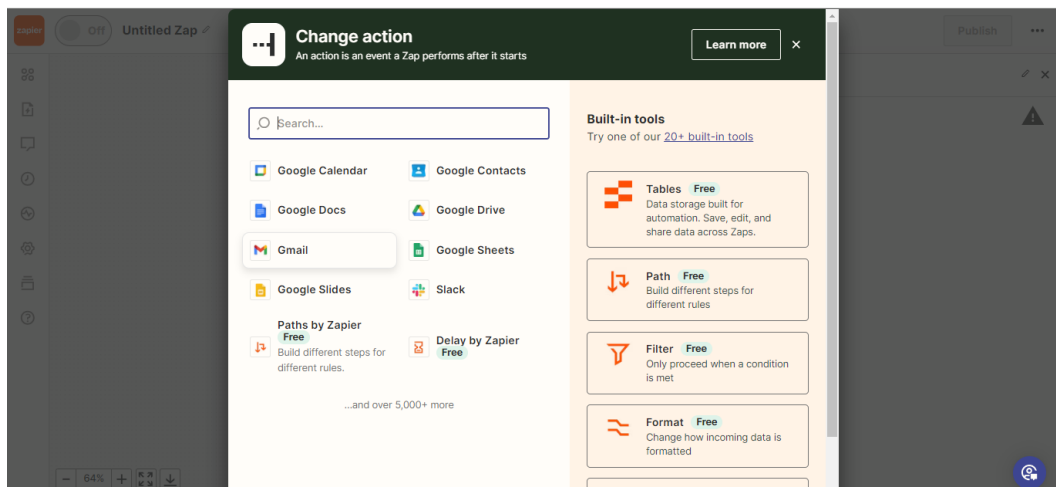
The following screen will appear:



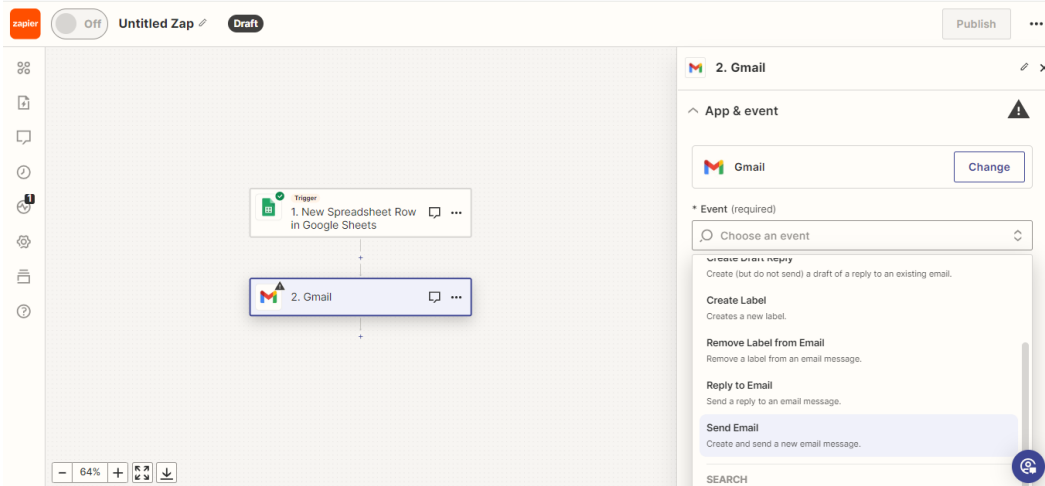
## 2.11 Click on **Action**



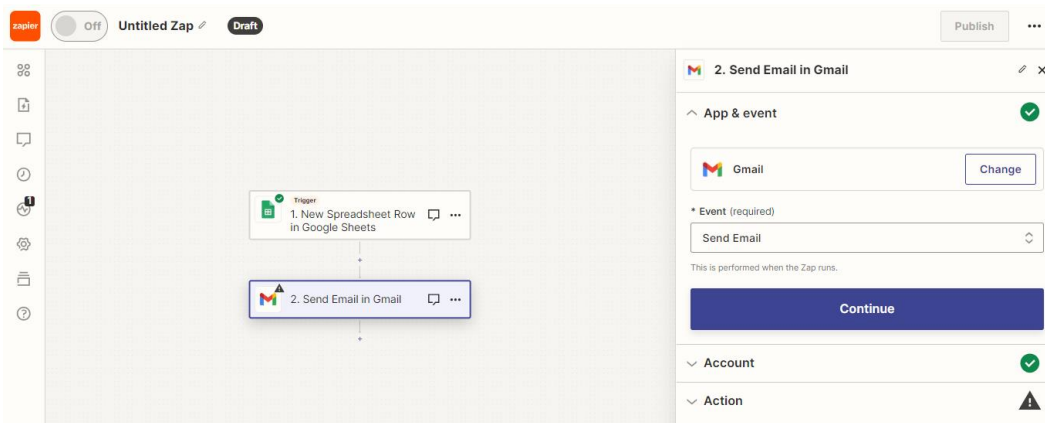
2.12 In the **Change action** page, search and select **Gmail**



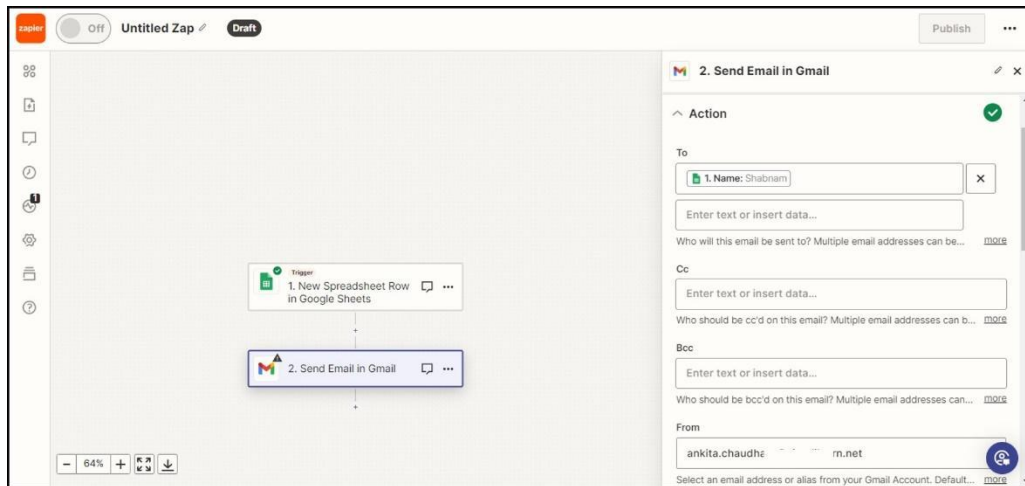
2.13 Under **Event**, search and select **Send Email**



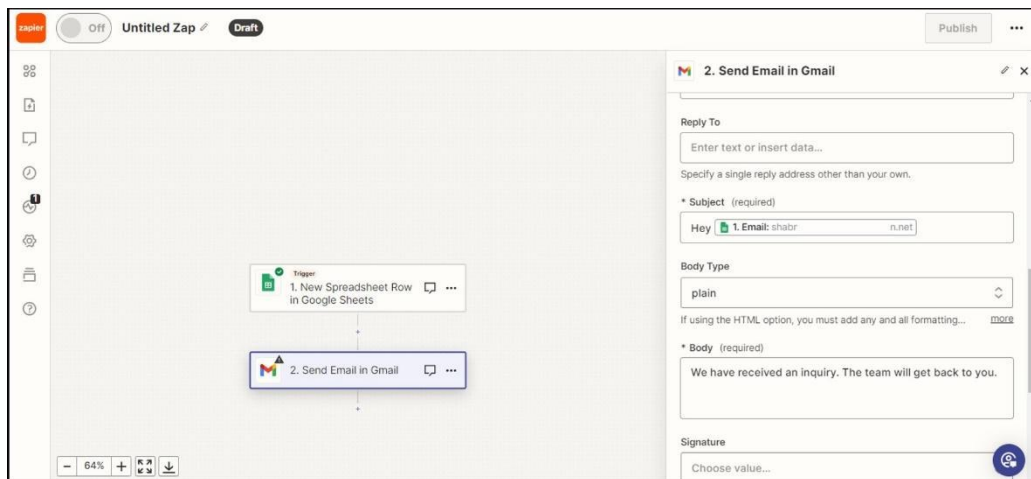
## 2.14 Click on **Continue**



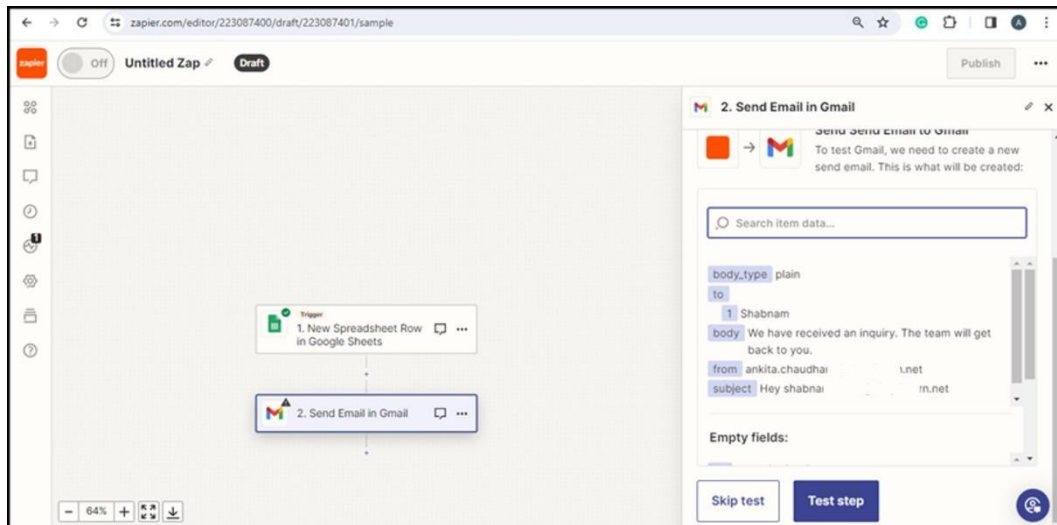
2.15 In the **To** section, select data from the sheet named **Lead data\_sample**, which has an email ID stored



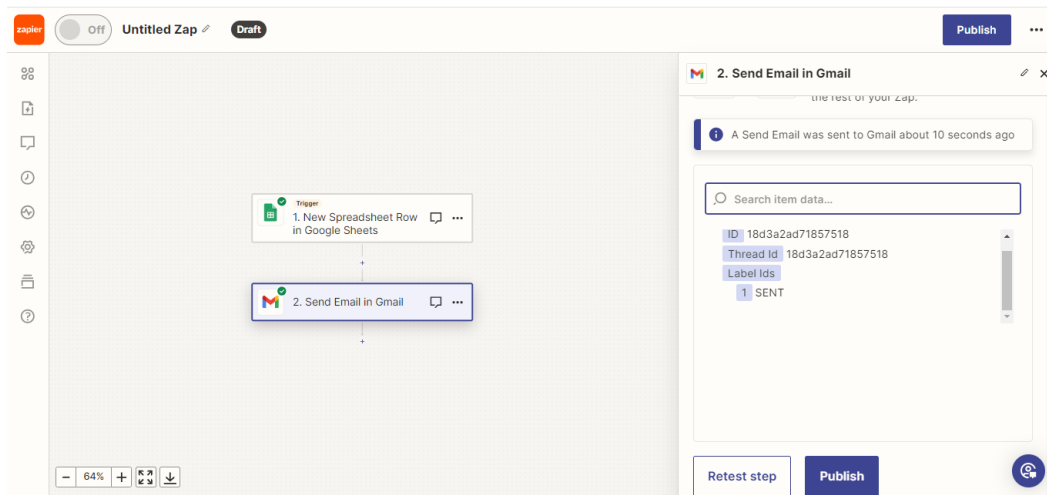
2.16 Select further action fields that you want to automate as shown below



2.17 Verify the data and click on the **Test step**

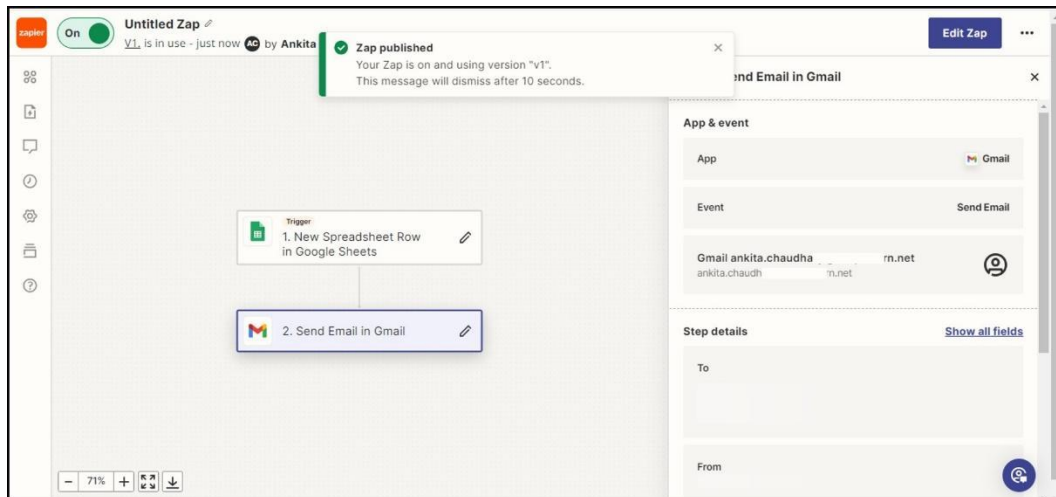


2.18 Zapier will act, and an email will be sent to the lead who has filled the form; click on **Publish**

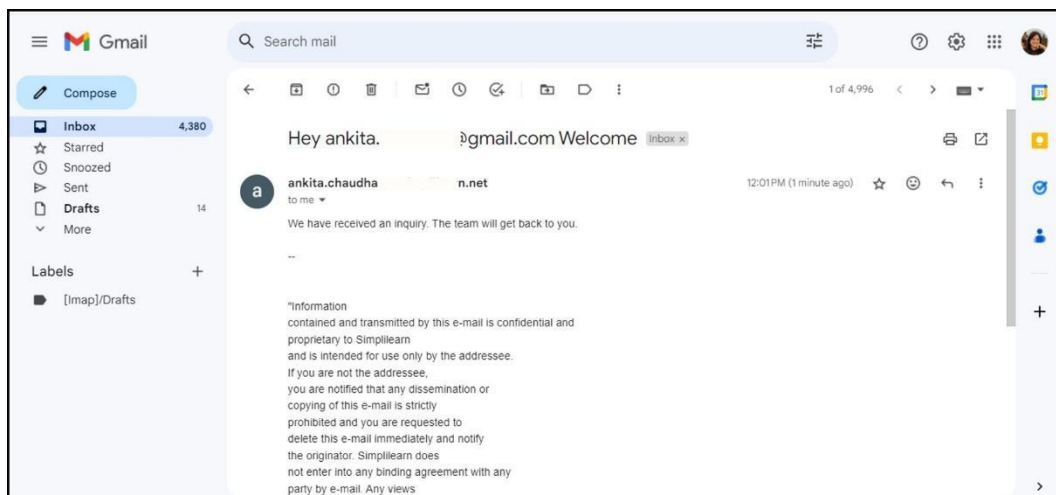


The following screen will appear:





The email sent is shown below:



You will receive an email for creating your first Zap from Zapier.com as shown below:

Congrats, you've created your first Zap! External Inbox x



**Zapier** <contact@zapier.com> [Unsubscribe](#)  
to me ▾

12:05 PM (1 minute ago)



[Log in](#)

# Woohoo, Ankita!

You created your first Zap!

You're off to a great start. Now let's find your next use case for how Zapier can help you automate busywork and focus on what matters:

By following these steps, you have successfully set up a Zapier account and created a Zap.