

## Lesson 04 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

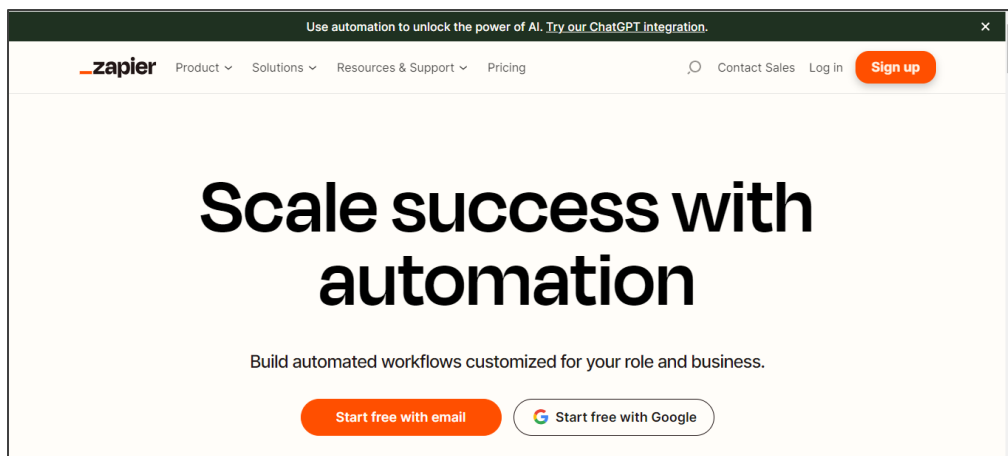
**Prerequisites:** None

**Steps to be followed:**

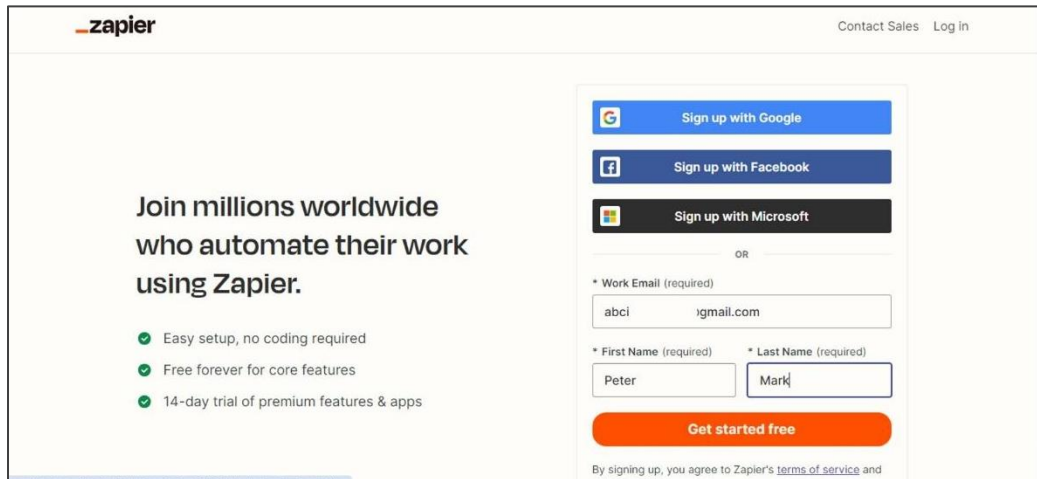
1. Set up a Zapier account
2. Create a Zap

#### 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 media sign-up 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". Below that are two fields for "First Name (required)" with the text "Peter" and "Last Name (required)" with the text "Mark". At the bottom of the form is an orange button labeled "Get started free". Below the button, it 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)

Peter

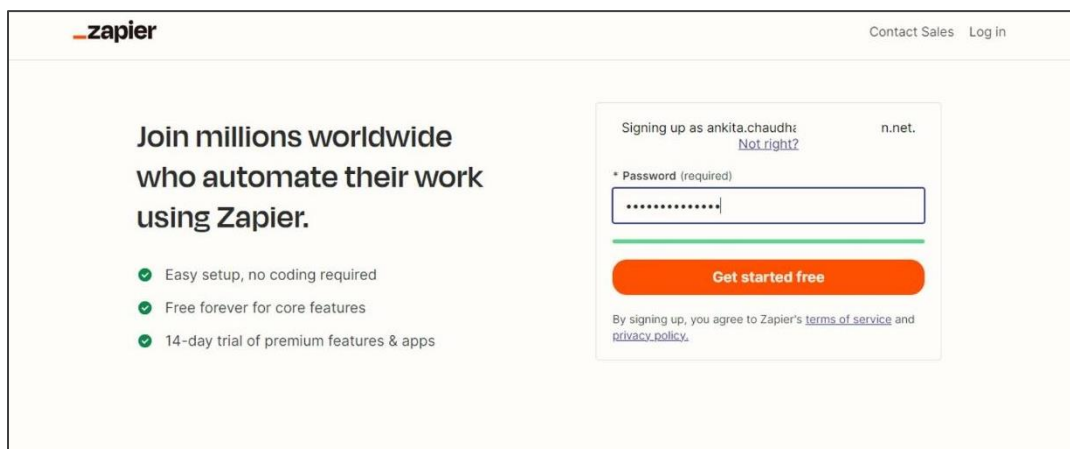
\* Last Name (required)

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 second step of the Zapier sign-up process. On the left, the same heading and bullet points are present. On the right, the form now shows "Signing up as ankita.chaudhary@gmail.com" with a link "Not right?". Below this is a "Password (required)" field with a masked password "\*\*\*\*\*". At the bottom of the form is an orange button labeled "Get started free". Below the button, it 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

Signing up as ankita.chaudhary@gmail.com

[Not right?](#)

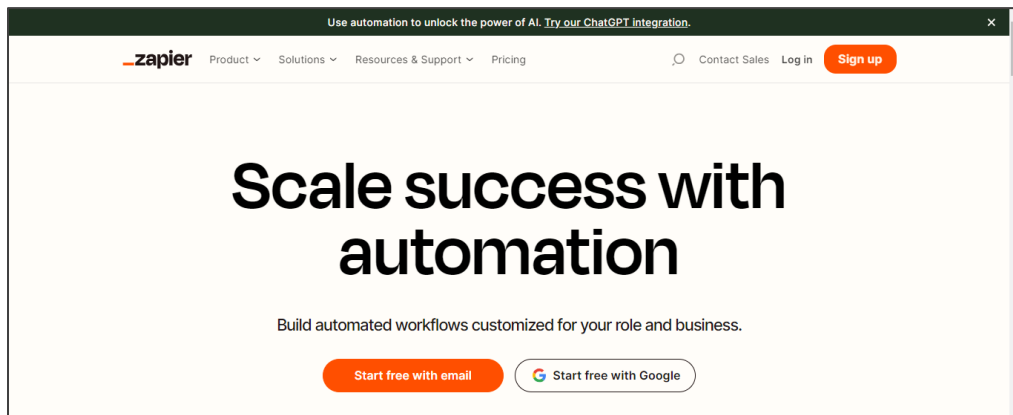
\* Password (required)

\*\*\*\*\*

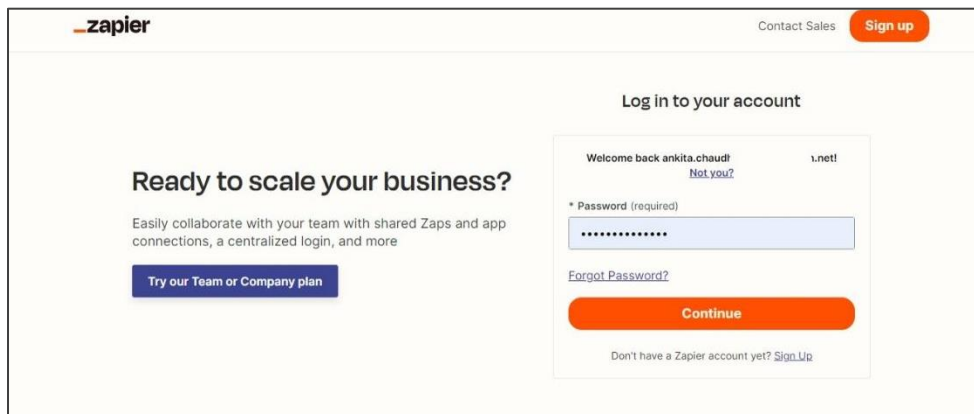
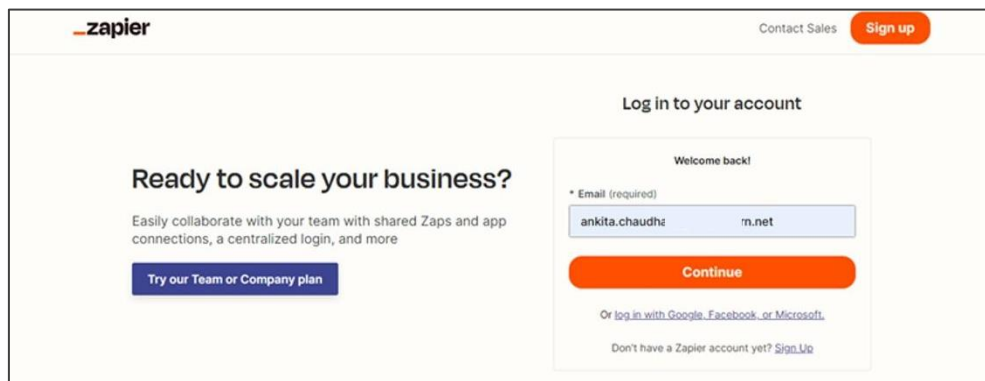
Get started free

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

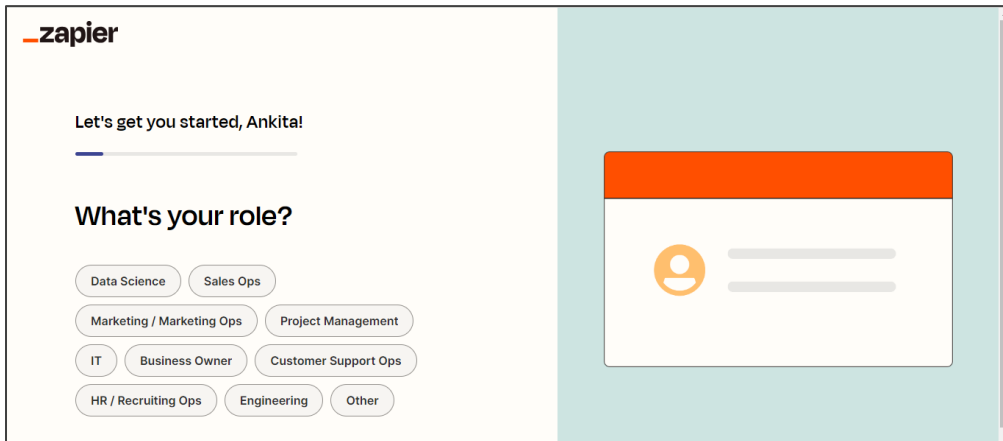
#### 1.4 Click on **Log in** next to the **Sign up** button



#### 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

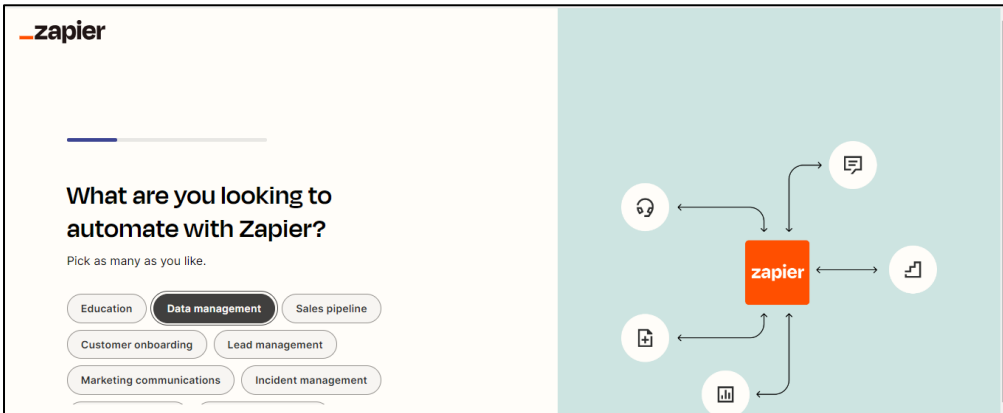
Marketing / Marketing Ops Project Management

IT Business Owner Customer Support Ops

HR / Recruiting Ops Engineering Other

The right side of the screen features a light blue background with a white rectangular box containing an orange user icon and two horizontal lines for a name and email address.

## 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.

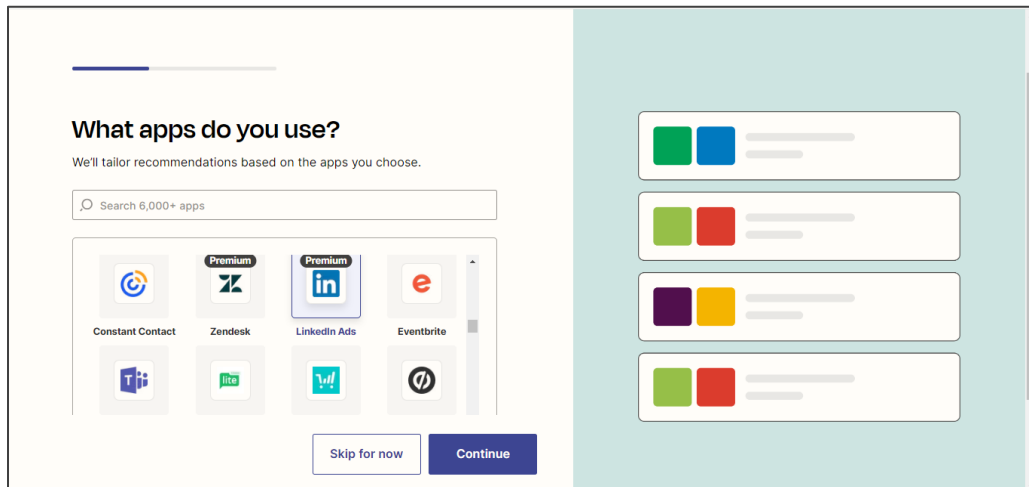
Education **Data management** Sales pipeline

Customer onboarding Lead management

Marketing communications Incident management

The right side of the screen features a light blue background with a central orange Zapier logo. Six circular icons are arranged around the logo, each with a double-headed arrow pointing to the center: a headset (support), a speech bubble (communication), a bar chart (analytics), a document with a checkmark (compliance), a calendar (scheduling), and a folder (organization).

## 1.8 Select the apps you want to use



**What apps do you use?**

We'll tailor recommendations based on the apps you choose.

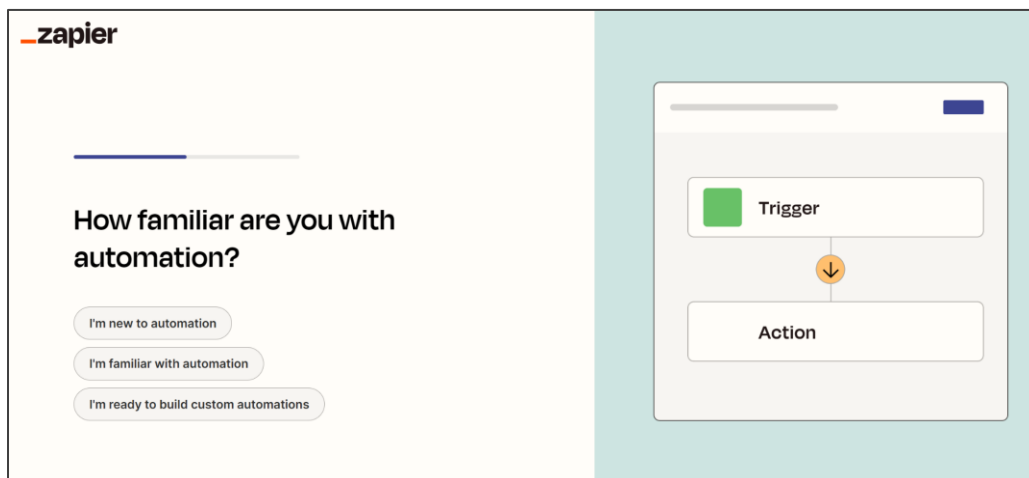
Search 6,000+ apps

Constant Contact, Zendesk, LinkedIn Ads, Eventbrite, Trello, Jira, Asana, Pinterest

Skip for now Continue

The interface shows a grid of app icons for selection. The 'LinkedIn Ads' icon is highlighted with a blue border. To the right, there are four placeholder boxes, each containing two colored squares and a text input field.

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



**How familiar are you with automation?**

I'm new to automation

I'm familiar with automation

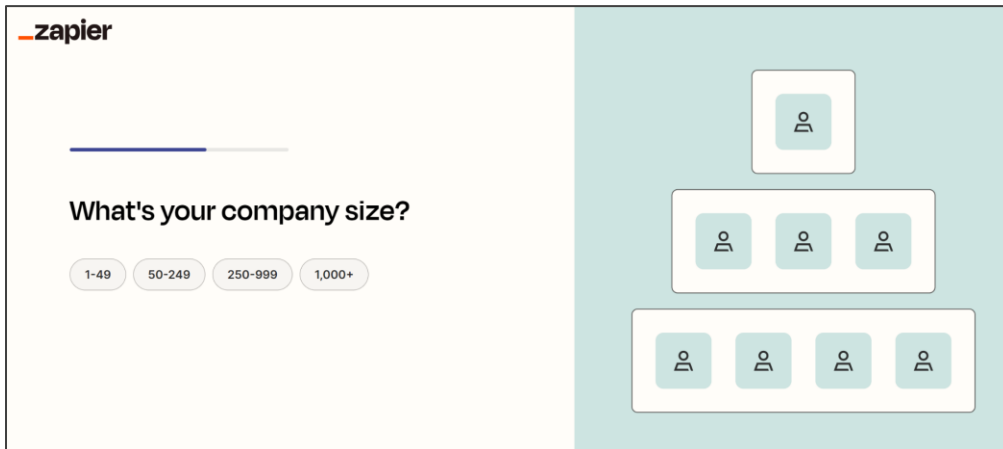
I'm ready to build custom automations

Trigger

Action

The interface features the Zapier logo at the top left. Below the question, there are three radio button options. To the right, a diagram shows a 'Trigger' box connected to an 'Action' box by a downward arrow.

### 1.10 Select the company size



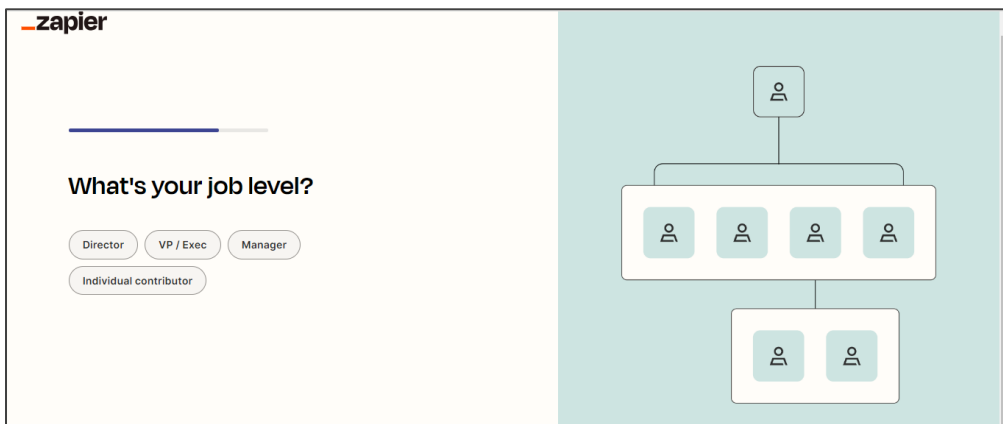
The interface for selecting company size on the Zapier website. It features a light yellow background on the left and a light teal background on the right. The Zapier logo is in the top left. A progress bar is partially filled. The question "What's your company size?" is centered. Below it are four buttons: "1-49", "50-249", "250-999", and "1,000+". On the right, a diagram shows a hierarchy of boxes with person icons: one box at the top, three boxes in the middle, and four boxes at the bottom.

**zapier**

What's your company size?

1-49 50-249 250-999 1,000+

### 1.11 Select the job level



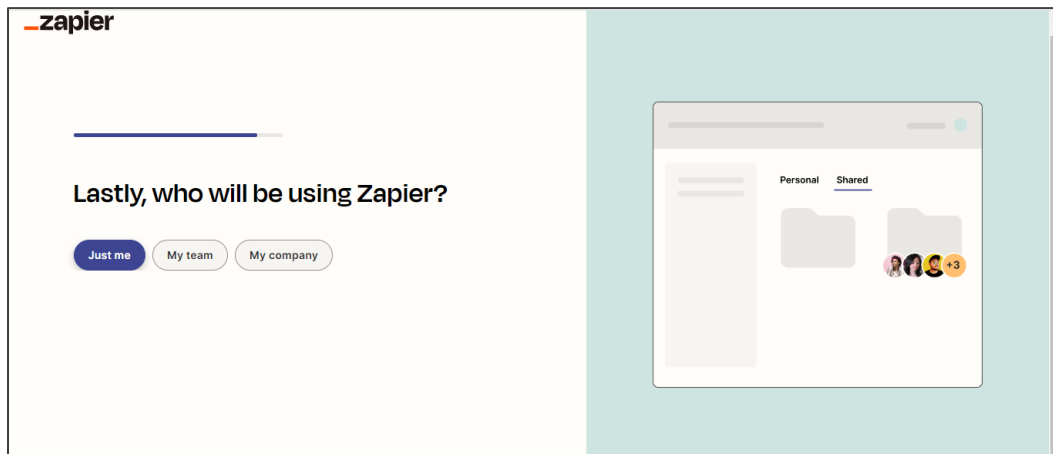
The interface for selecting job level on the Zapier website. It features a light yellow background on the left and a light teal background on the right. The Zapier logo is in the top left. A progress bar is partially filled. The question "What's your job level?" is centered. Below it are five buttons: "Director", "VP / Exec", "Manager", "Individual contributor", and "Individual contributor". On the right, a diagram shows a hierarchy of boxes with person icons: one box at the top, four boxes in the middle, and two boxes at the bottom.

**zapier**

What's your job level?

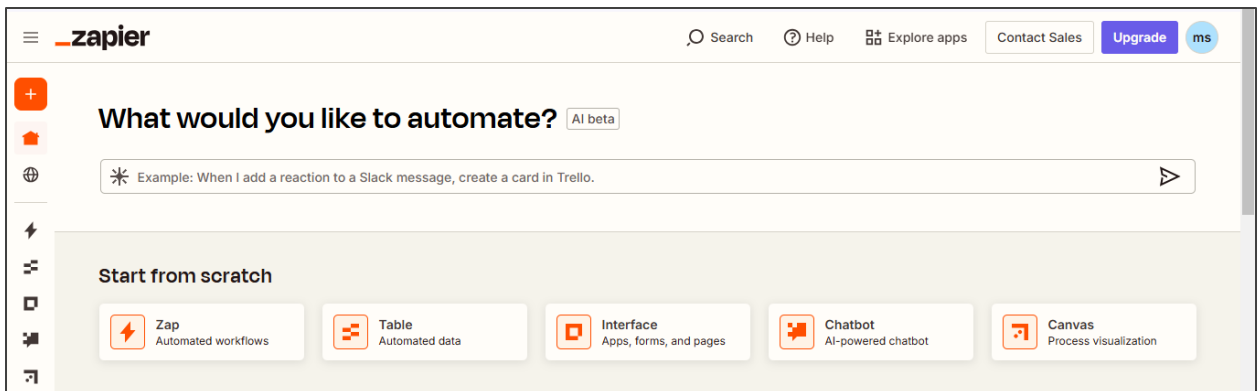
Director VP / Exec Manager Individual contributor Individual contributor

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

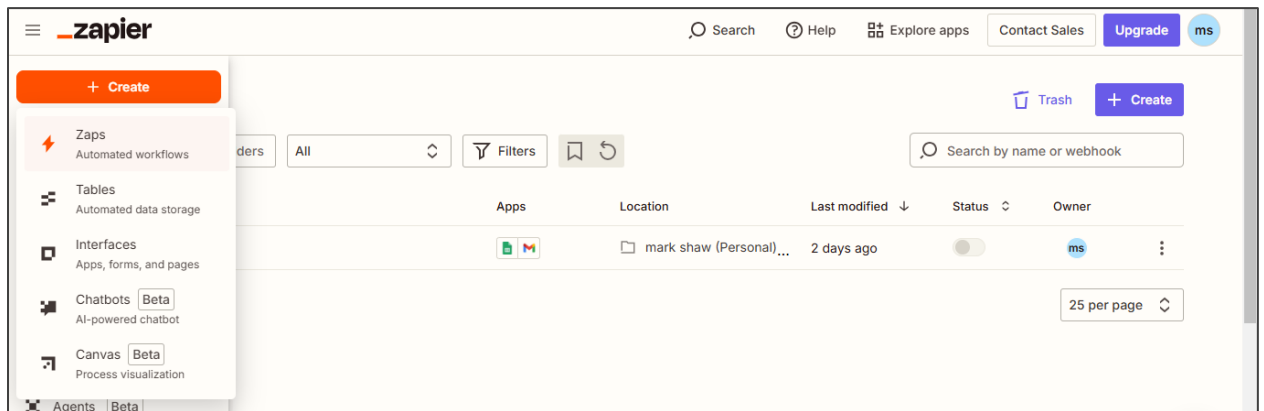


## Step 2: Create a Zap

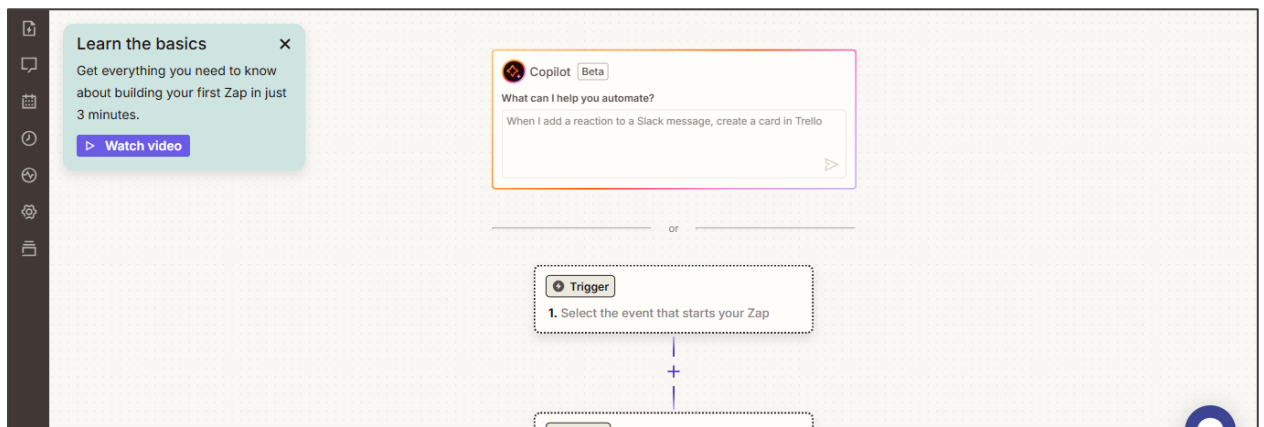
2.1 Navigate to the Zapier dashboard and click on the + icon



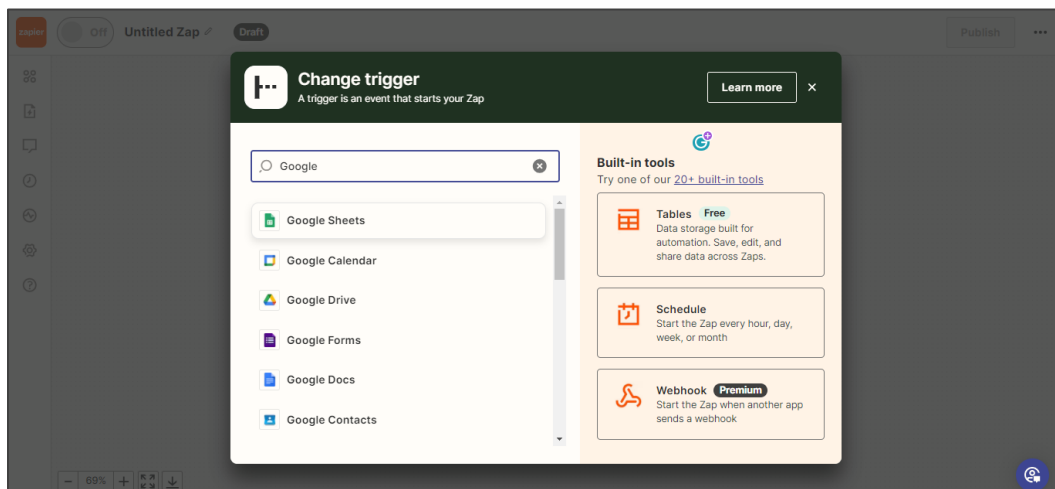
## 2.2 Click on the + Create button and select Zaps



## 2.2 Click on Trigger

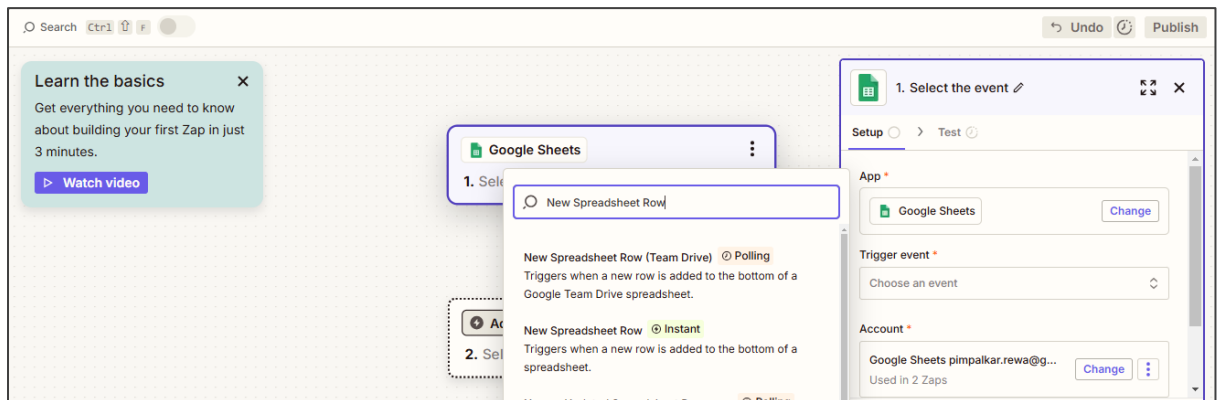


## 2.3 In the Change trigger page, search for and select Google Sheets in the search bar

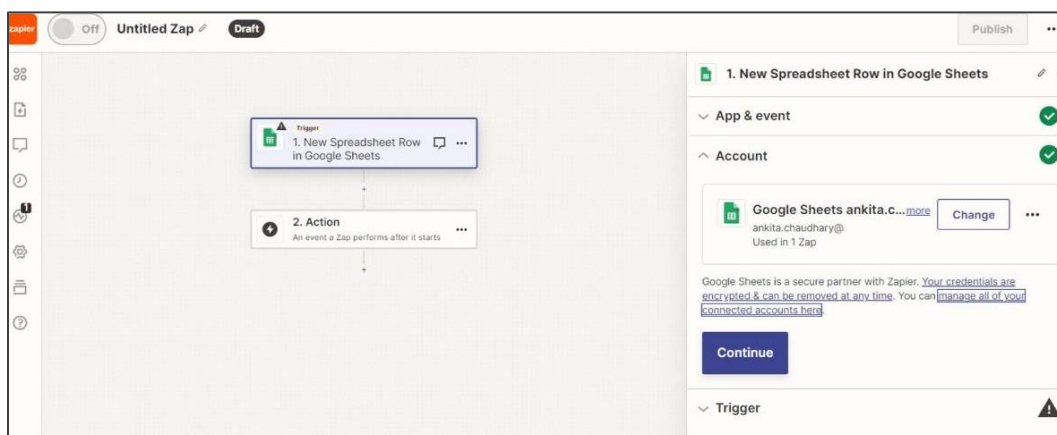
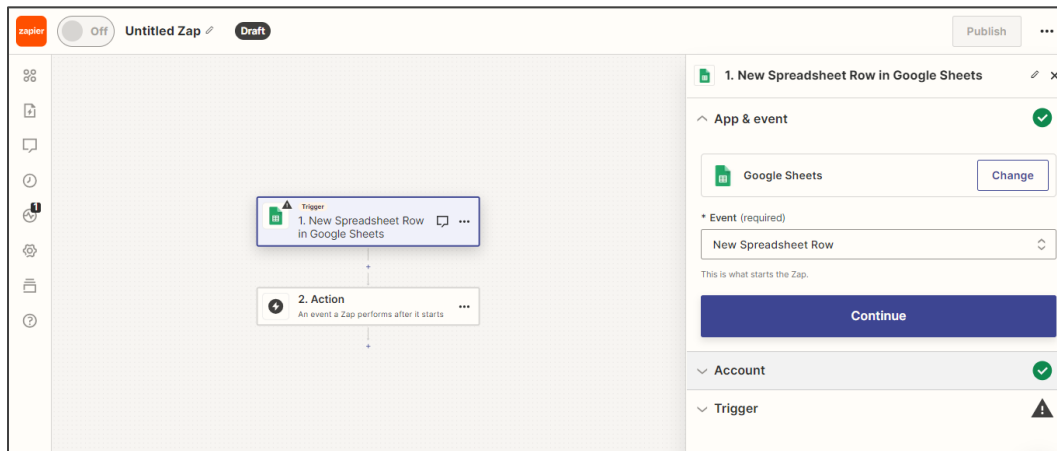




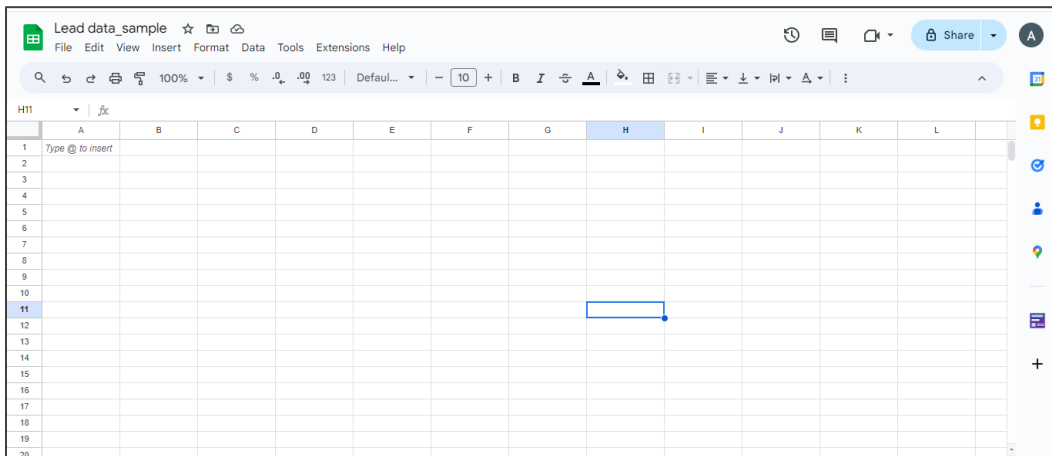
## 2.4 Under **Trigger** event on the right panel, search and select **New Spreadsheet Row**



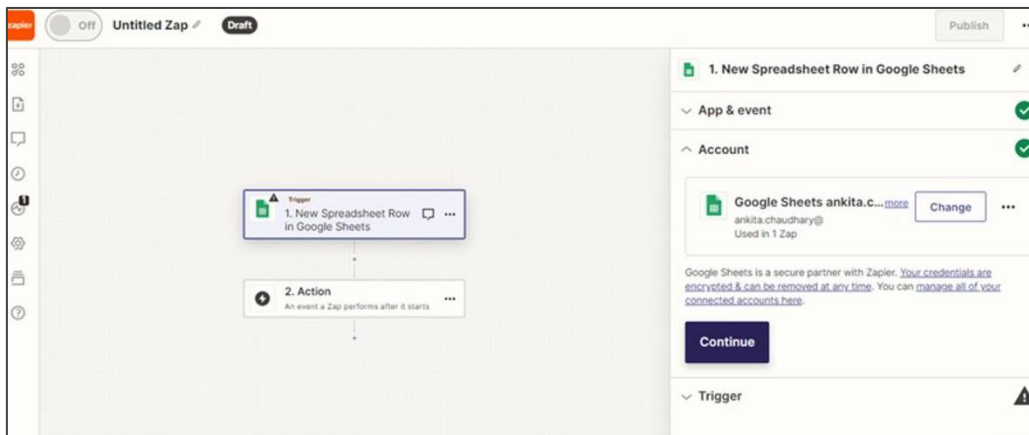
## 2.5 Click on **Account** and then select the Google account



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

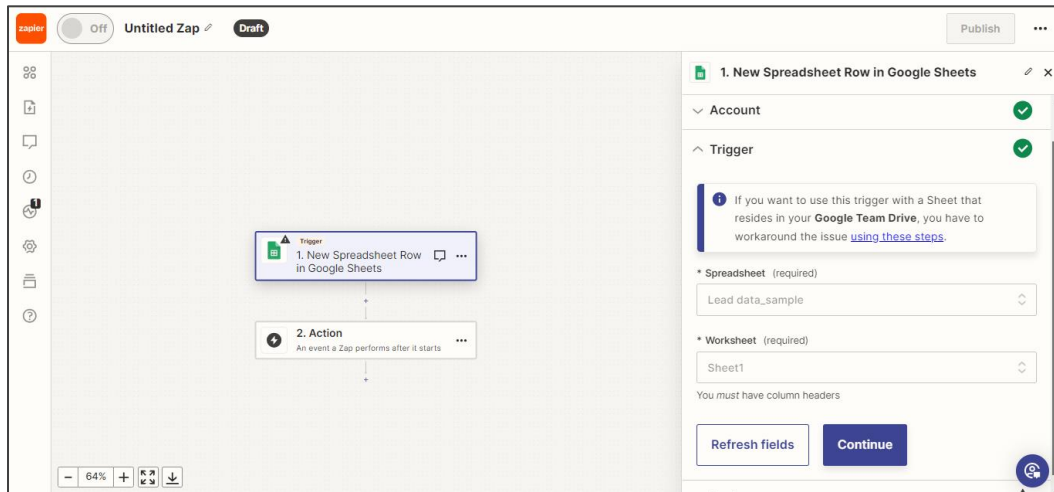


2.7 Once your account is connected, select **Continue**



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

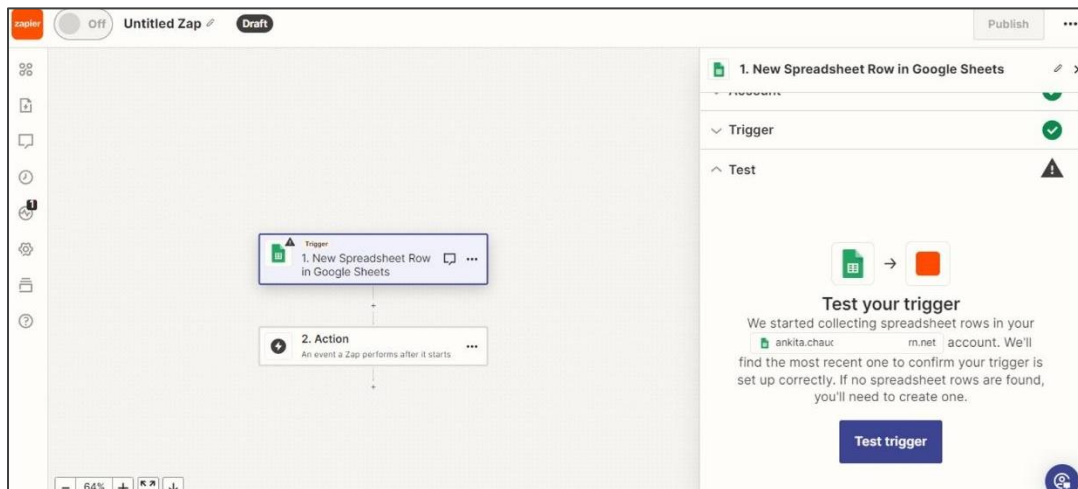
This shall appear automatically, as your Google Sheets is linked to your Google Drive account.  
In **Worksheet**, select **Sheet 1**.



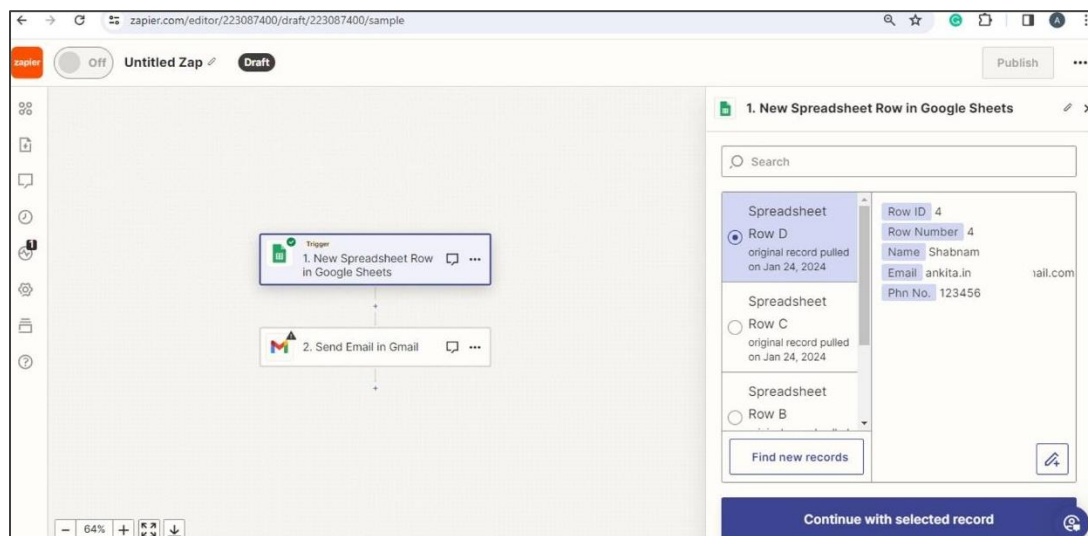
## 2.9 Fill up a sample data in the spreadsheet, **Lead data\_sample**

Lead data_sample						
File Edit View Insert Format Data Tools Extensions Help						
100% 123 Default... 10 B I A						
E12	fx					
	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						
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11						
12						

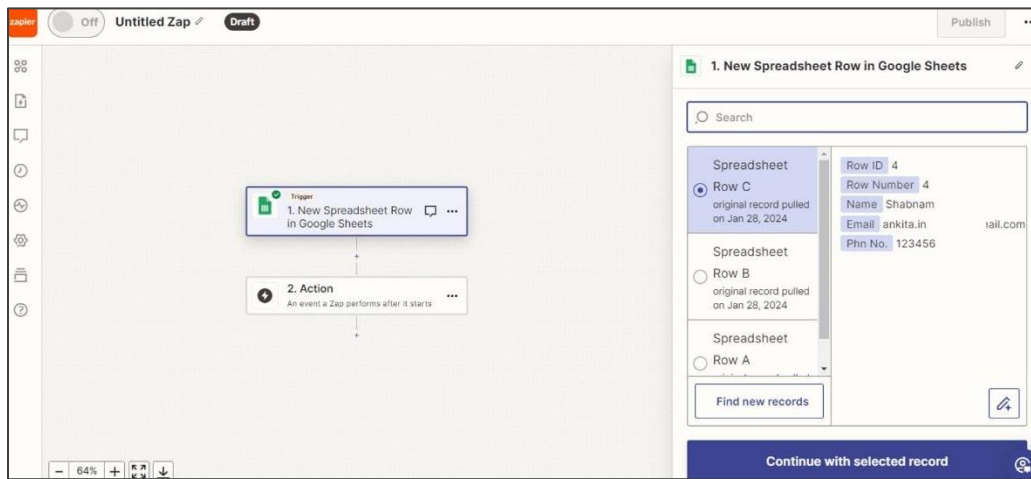
## 2.10 Click the **Test trigger** button to show the row data on Zapier



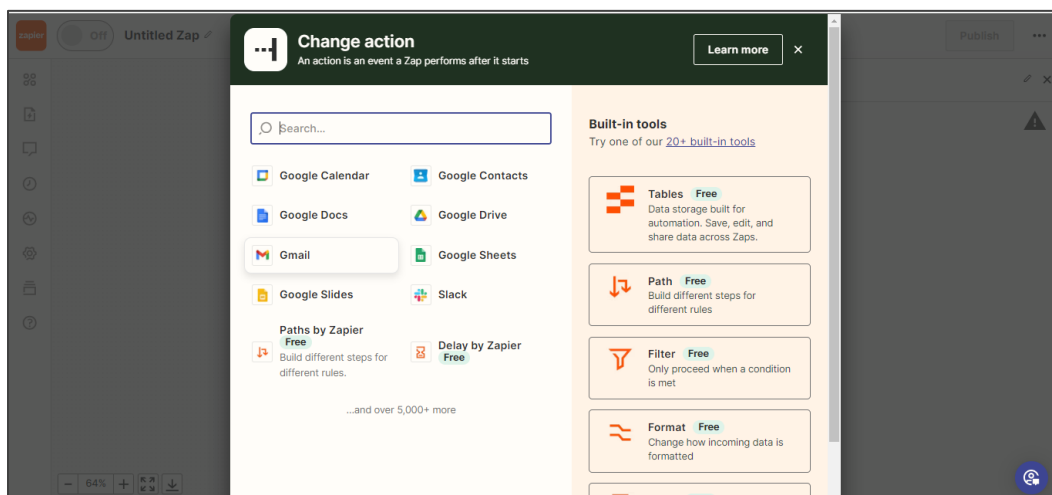
The following screen will appear:



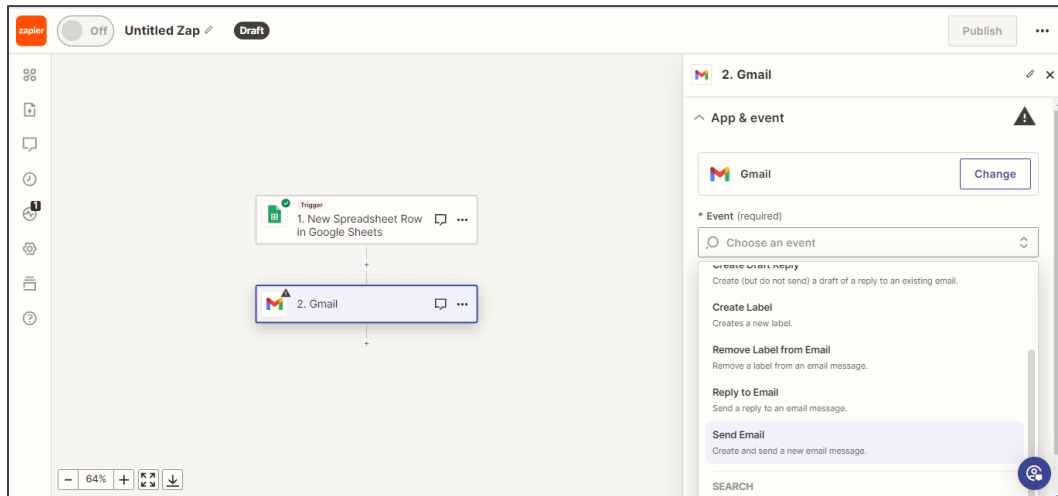
## 2.11 Click on Action



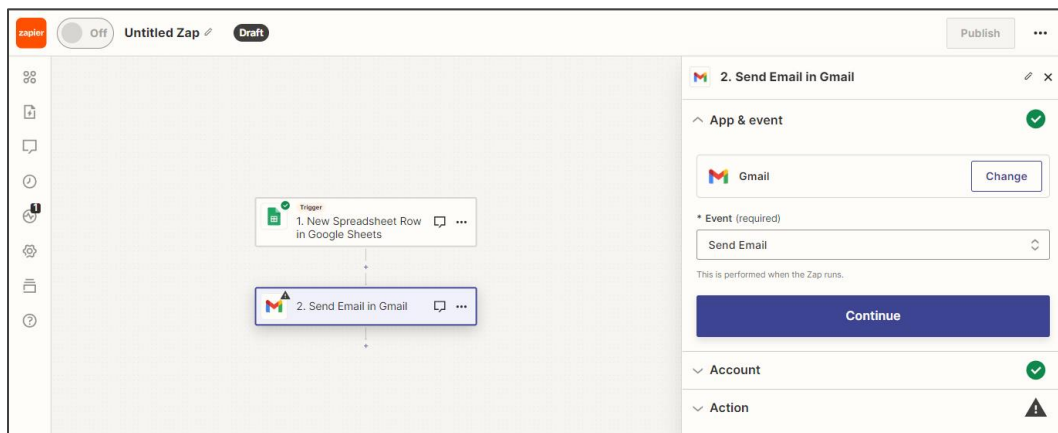
## 2.12 In the Change action page, search and select Gmail



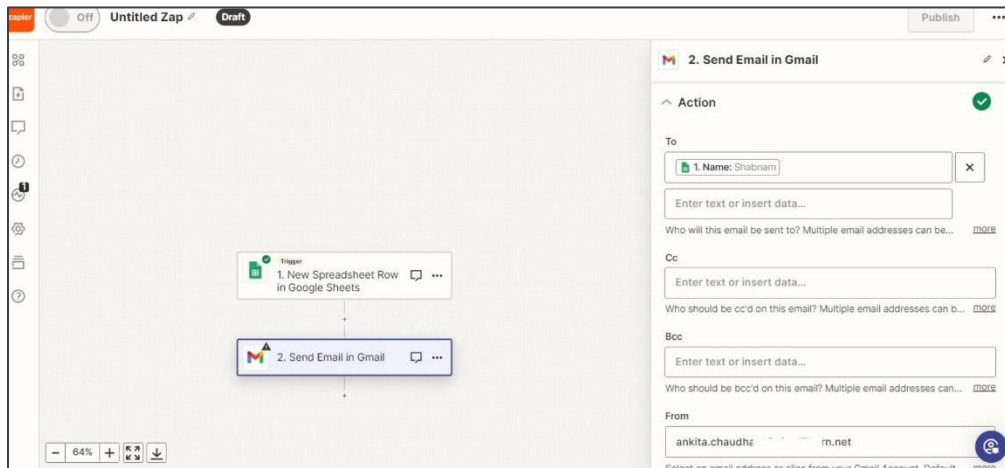
## 2.13 Under **Event**, search and select **Send Email**



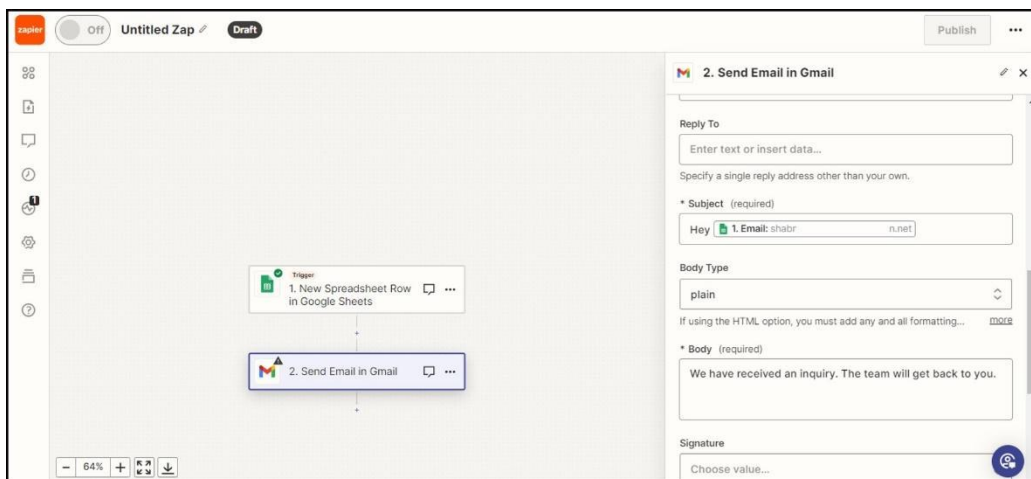
## 2.14 Click on **Continue**



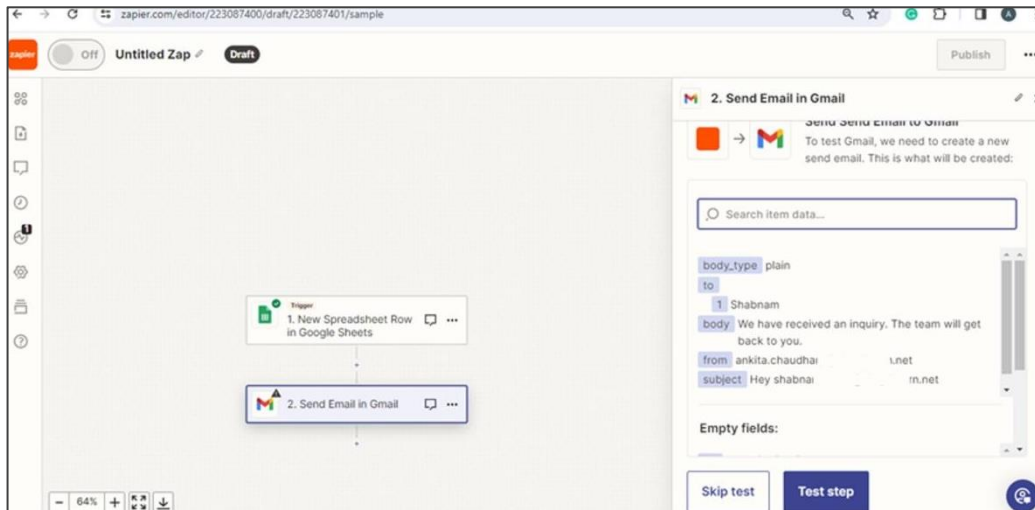
2.15 In the **To** section, select data from the sheet named **Lead data\_sample**, which has an email ID stored



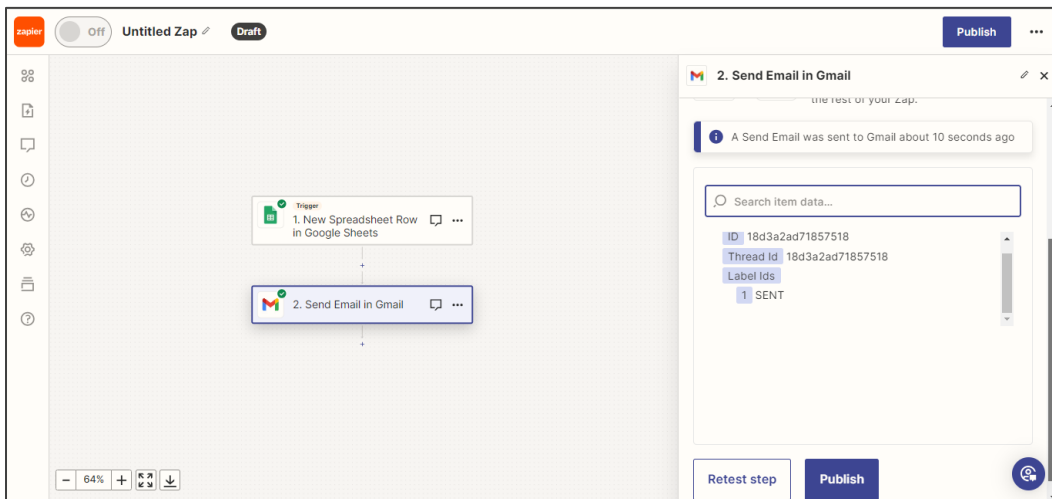
2.16 Select further action fields that you want to automate as shown below



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

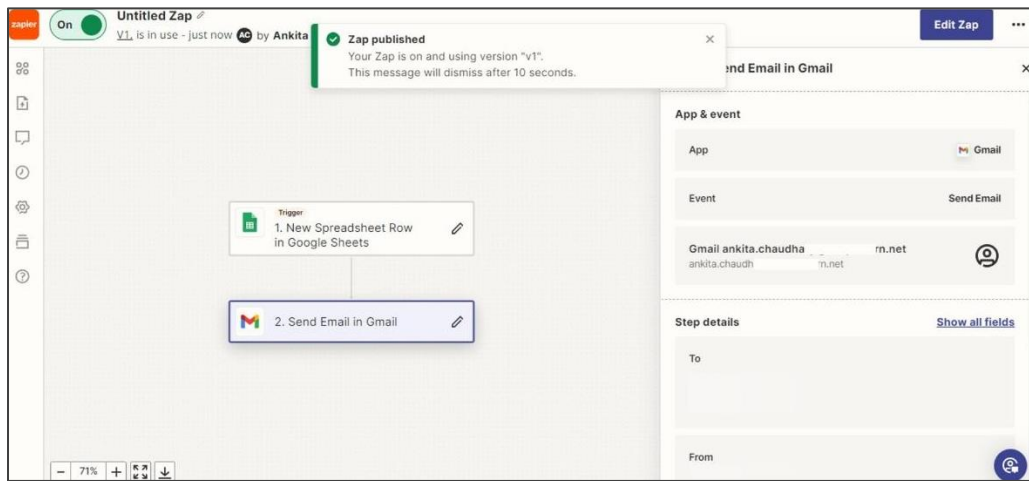


## 2.18 Zapier will act, and an email will be sent to the lead who has filled the form; click on **Publish**

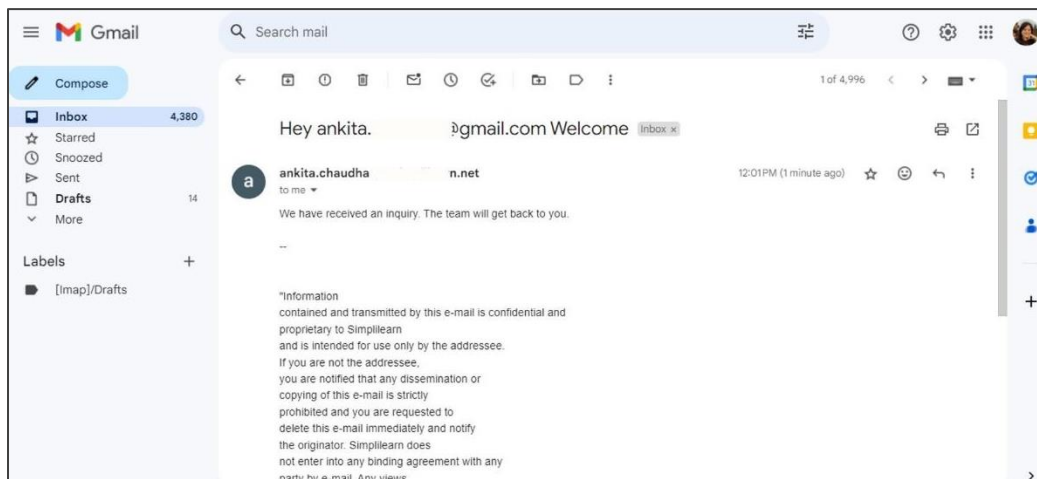




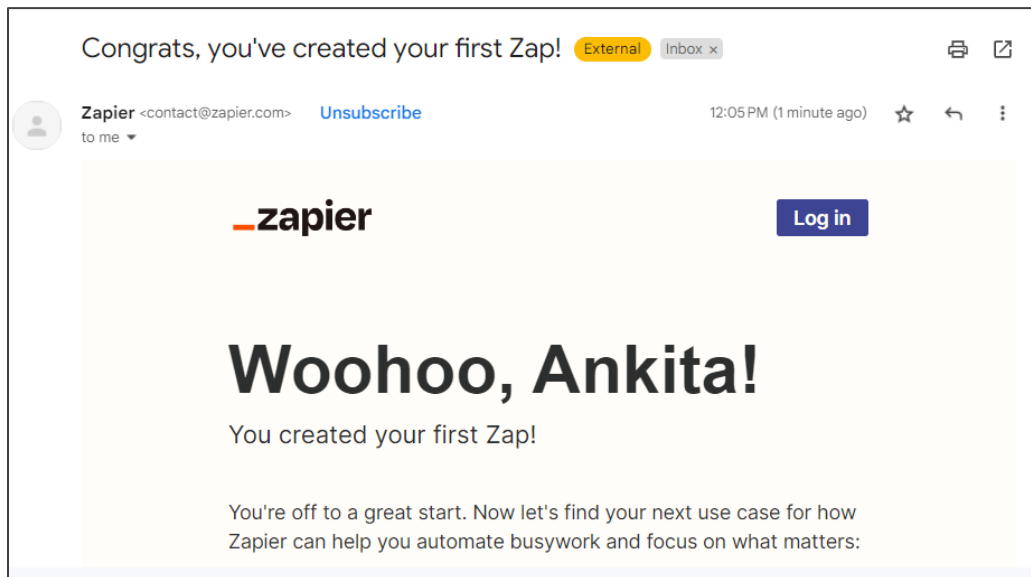
The following screen will appear:



The email sent is shown below:



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



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