**Lesson 03 Demo 01**

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

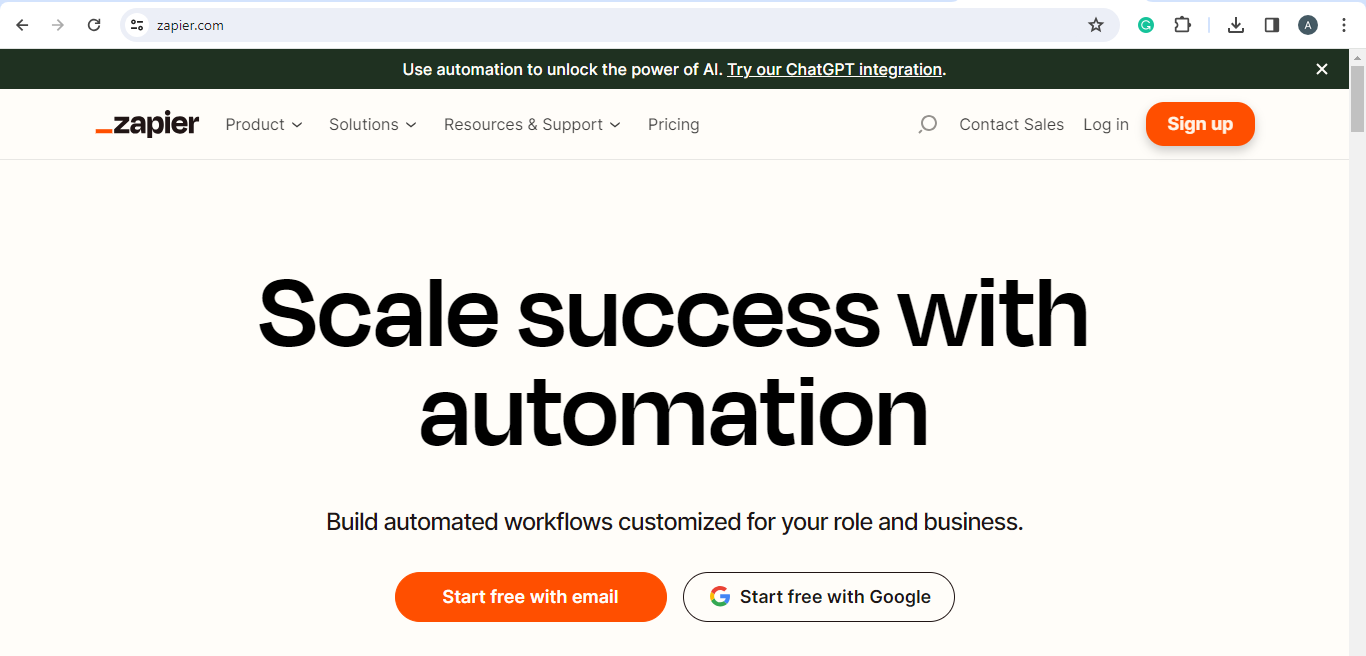


Steps to be followed:

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

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

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

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* 1. Enter the credentials

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* 1. Enter the **Password**

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* 1. Click on **Log in** next to the **Sign up** button

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* 1. Enter the **Email** and **Password** and click on **Continue**

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A screenshot of a login page

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* 1. Choose your user role

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* 1. Select the option that needs to be automated with Zapier

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* 1. Select the apps you want to use

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* 1. Choose the option that best reflects how familiar you are with automation

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* 1. Select the company size

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1.11 Select the job level

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

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**Step 2: Create a Zap**

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

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* 1. Click on **Trigger**

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

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

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

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2.6 Before selecting the next step, go to your Google Drive and make a spreadsheet with

the name **Lead data\_sample**

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

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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.**

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

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

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The following screen will appear:

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2.11 Click on **Action**

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

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

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2.14 Click on **Continue**

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

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

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

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

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The following screen will appear:

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The email sent is shown below:

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

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