Zapier Multi-Step Zap in Support of Sales CRM Dashboard

The Sales CRM Dashboard optionally makes use of a multi-step Zap built on Zapier's middleware SaS offering. The Zap is triggered by the appearance of a new Opportunities record with a status of 'Closed – Won' or 'Closed – Lost' in the Closed Opportunities view. On receipt of the trigger, the Zap searches for a record in the Images table whose {Name} matches the Opportunities record's {Percent Match} field. It then stores this image in the {Cover} field in the Dashboard table's 'Win/Lose' record and updates the record. At this point, the Dashboard 'Win/Lose' meter will display a won/lost pie chart reflecting the current ratio of wins:losses.

Currently, Zaps cannot be shared; they have to be created by the user under whose account the Zap runs. Accordingly, what follows is the information necessary to configure a Zap to update the CRM Dashboard.

Step 1: Trigger

- App: <u>Airtable</u>
- Trigger: <u>New Record in View</u>
- App instance: <u>Attach to your Airtable account</u>
- Edit options
  - Base: <u>Sales CRM Dashboard</u>
  - Table: <u>Opportunities</u>
  - View: <u>Closed Opportunities</u>

Test and continue

Step 2: Search

- App: <u>Airtable</u>
- Search: <u>Find Record</u>
- App instance: <u>Attach to your Airtable account</u>
- Edit options
  - Base: <u>Sales CRM Dashboard</u>
  - Table: <u>Images</u>
  - Search by Field: <u>Name</u>
  - Search Value: <u>Step 1: Percent Match</u>
  - Search Formula: <u>[leave blank]</u>
  - Limit to View: <u>[leave blank]</u>
  - Create Airtable Record if it doesn't exist yet? <u>[leave unchecked]</u>

Test and continue

Step 3: Action

- App: <u>Airtable</u>
- Action: <u>Update Record</u>
- App instance: <u>Attach to your Airtable account</u>
- Edit Template
  - Base: <u>Sales CRM Dashboard</u>
  - Table: <u>Dashboard</u>
  - Record: <u>Record ID for the 'Win/Lose' meter</u>
  - Cover: <u>Step 2: Fields Attachments URL</u>

Test and save