zapier

Getting Started with Zapier

By The Zapier Team

ZAPIER.COM/LEARN

About this guide

Welcome to the complete guide to getting started with Zapier. Learn how to connect the apps you know and love to build workflows, automate repetitive tasks, and save time.

Who is this guide for?

Technical and non-technical folks, brand-new users to Zapier, and anyone who just wants to brush up on their Zapier knowledge.

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1 What is Zapier?

Key points

- **Zapier** is the glue that connects more than **1,500 web apps**.
- **Zaps are workflows** that connect your apps, so they can work together.
- **Zaps start with a trigger**—an event in one of your apps that kicks off your workflow.
- **Zaps automate tasks** in the background, so you can focus on more important work.

In the next chapter, we'll cover how to **build custom Zaps**.

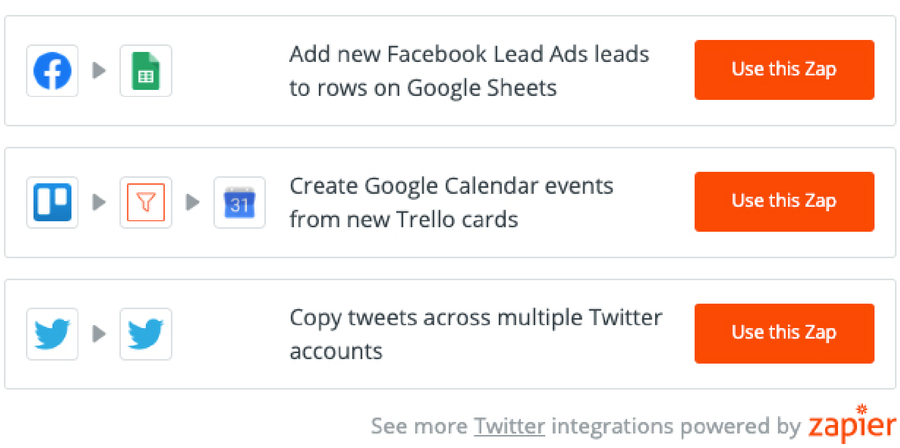
What is Zapier?

Zapier is an online automation tool that connects your favorite apps, such as Gmail, Slack, Mailchimp, and over 1,500 more. You can connect two or more apps to automate repetitive tasks without coding or relying on developers to build the integration. It's easy enough that anyone can build their own app workflows with just a few clicks.

For example, maybe you get a lot of email attachments in your Gmail account and you want to save them to Dropbox. Every time you get an attachment, you could open up the email, click the attachment, and then save it to Dropbox. Or you can have Zapier automate this for you, saving you time and effort.

Other examples of Zaps you can create

With Zapier, there are thousands of different workflows you can create. Here are just a few more examples to help inspire you:



There are many more ways to use Zapier. In fact, we collected **300+ ways to automate your work with Zaps**.

In the following pages, we'll show you how to use Zapier. But, first, let's go over a few terms you'll encounter in this guide.

Common terms: Learn to speak Zapier

Zap

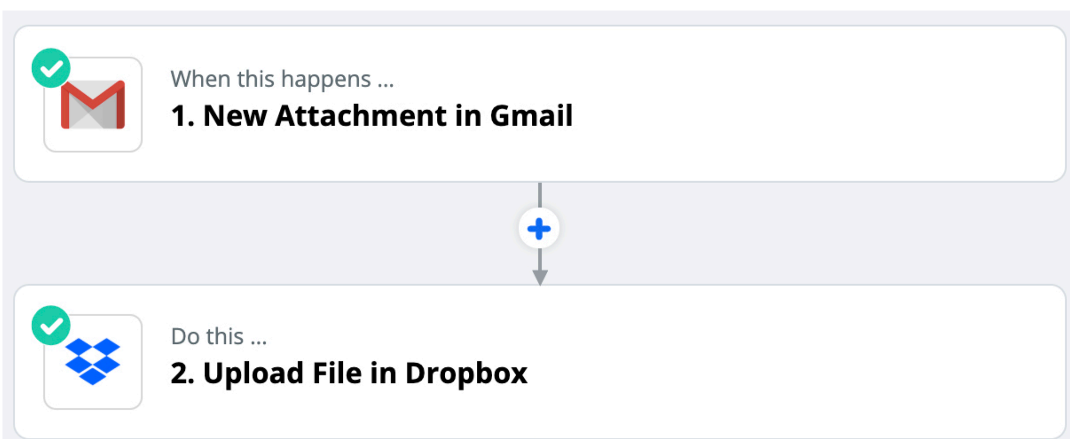
A Zap is an automated workflow between your apps. For example, you may have a Zap that saves your Gmail attachments to Dropbox and another Zap that saves emails that you star in Gmail to a text file. Zaps consist of at least two parts: a trigger and one or more actions.

Trigger

A trigger is the event in an app that starts the Zap. Once you set up a Zap, Zapier will monitor the app for that event. For the save Gmail attachments to Dropbox example, you can receive a lot of emails through your Gmail account, but the Zap isn't triggered until an email contains an attachment.

Action

An action is the event that completes the Zap. For the save Gmail attachments to Dropbox example, the action is uploading the attachment from your email to Dropbox.



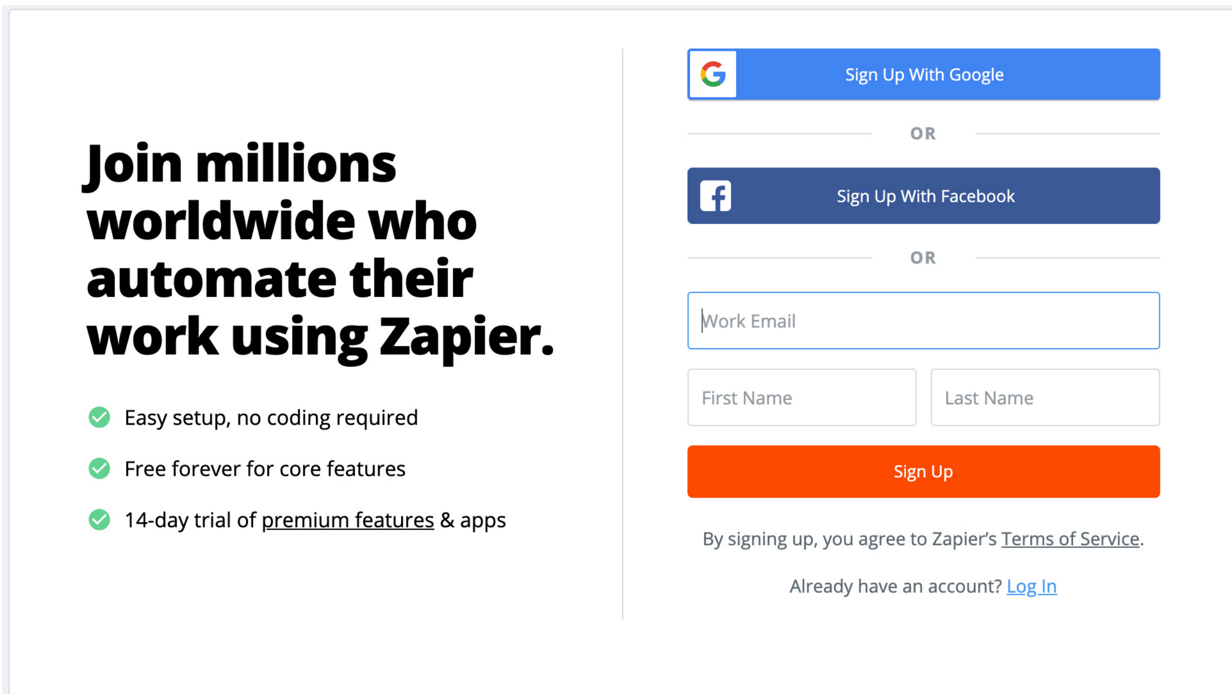
Task

Each piece of data you run through your Zap counts as a Task. That means if your Zap adds 100 emails to Dropbox automatically, your Zap just performed 100 Tasks.

Every Task your Zap performs is another task that you don't have to do manually. It's important to keep in mind the number of Tasks your Zaps run, because it helps determine which **Zapier plan** is best for you.

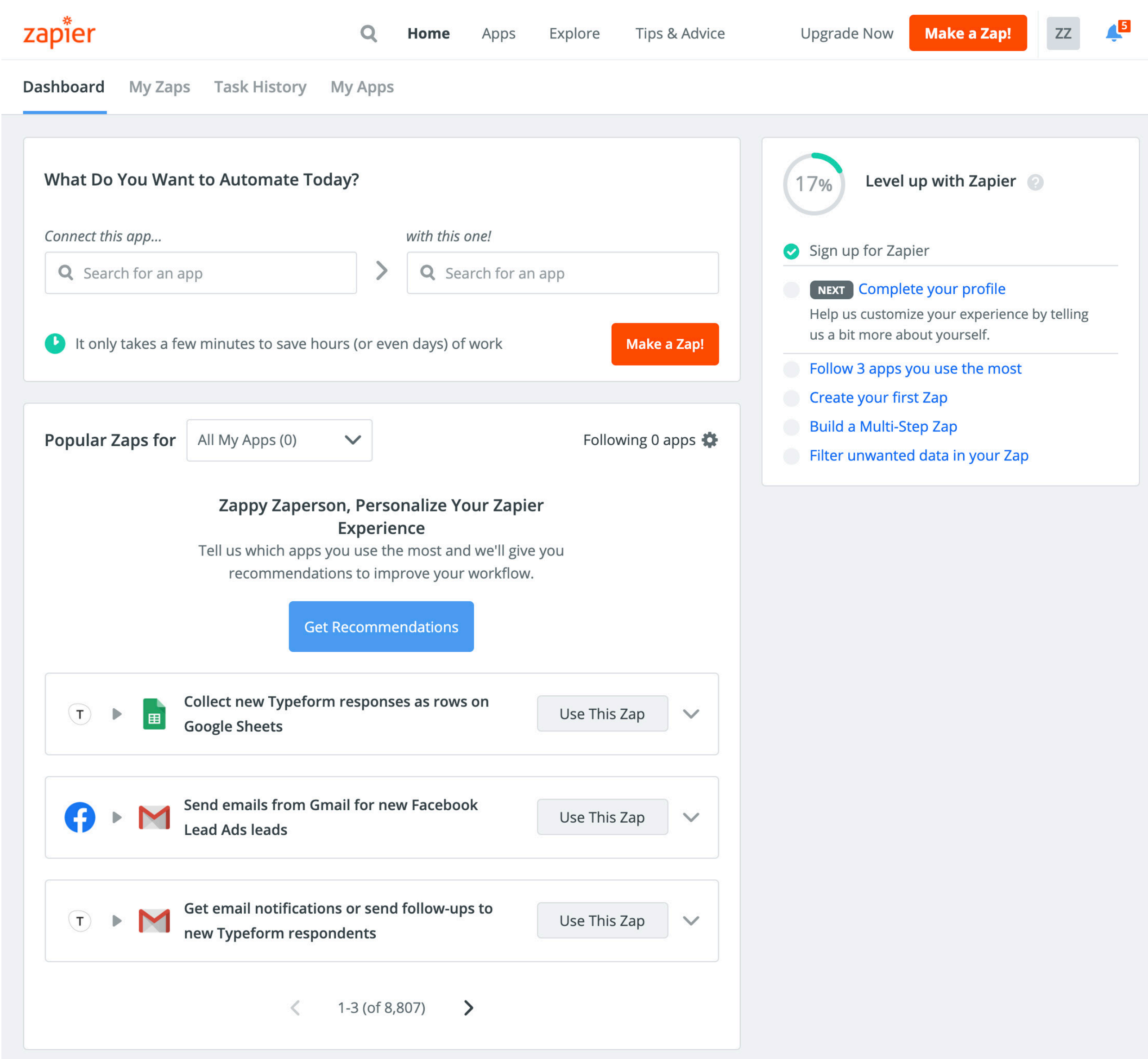
Create a Zapier account

Now you're ready to start creating Zaps. The first thing you'll need to do is **sign up for a free account**. Type in your name, email address, and a password. You'll now have access to our core features forever and many of our paid features for 14 days. Learn more about your **free trial**.



Getting around Zapier

When you first **log into Zapier**, you'll see your ***Dashboard***. Here you can quickly build a Zap and see some popular Zap templates—pre-made Zapier workflows. If you click **Get Recommendations** and select some of your favorite apps, we'll show you the most popular Zaps for your picks.

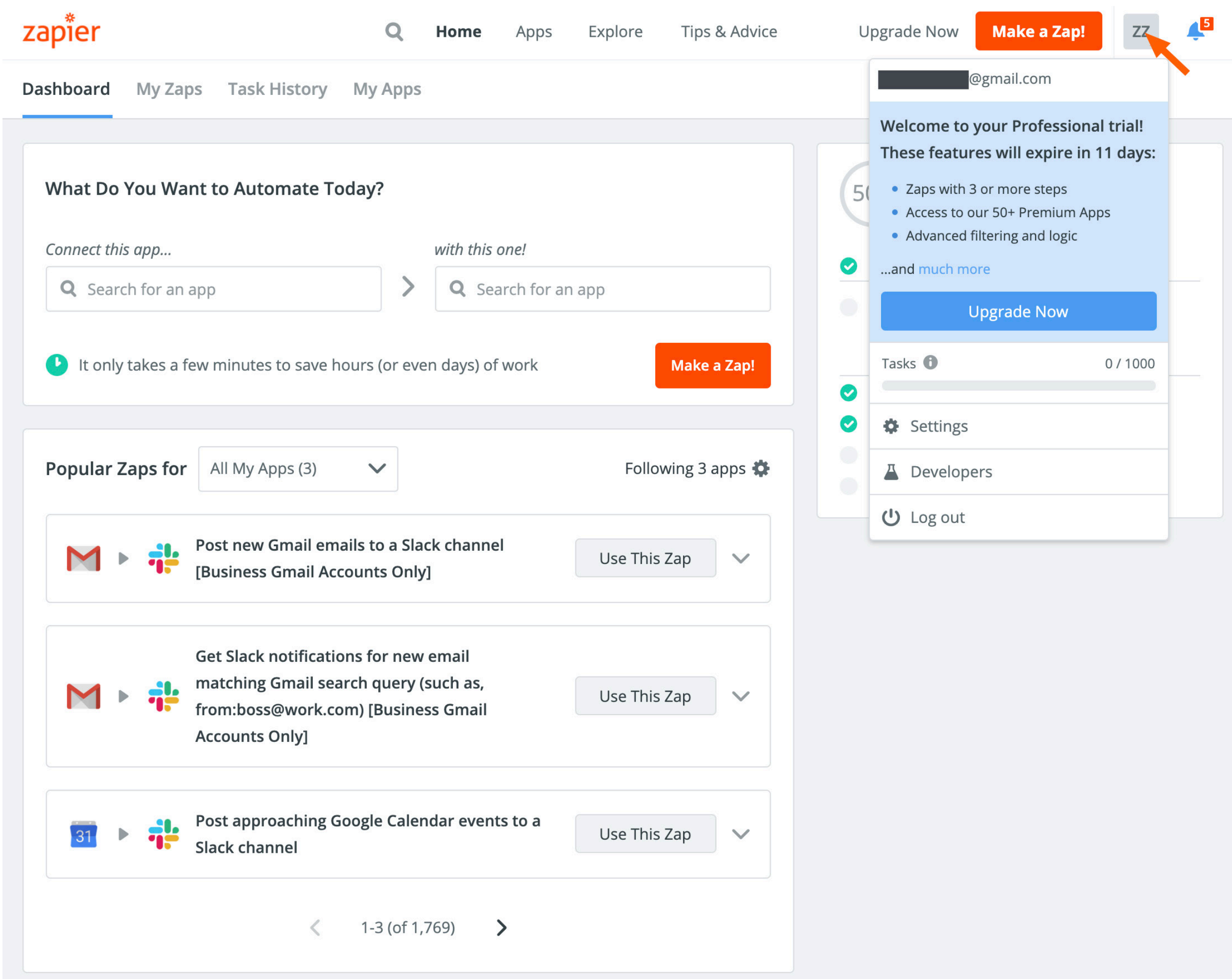


If you go to the *My Zaps* tab, you'll see all of the Zaps you've previously created or are currently using. Here you can create new Zaps, edit previously-created Zaps, turn Zaps on or off, and create folders to organize your Zaps.

On the *Task History* tab, you'll see a list of every Task your Zaps have attempted. Sort Tasks by Zap, Task status, or date with filters.

On the *My Apps* tab, you'll see all of the accounts you've connected to Zapier for your Zaps. Here you can connect new accounts, or test, reconnect, or disconnect existing accounts.

In the top right-hand corner, click the dropdown to see the number of Tasks left in your account for your current billing period, change your account settings, log out, and more.


Home
Apps
Explore
Tips & Advice
Upgrade Now
Make a Zap!
ZZ
5
Dashboard
My Zaps
Task History
My Apps
What Do You Want to Automate Today?
Connect this app...
with this one!
Search for an app
Search for an app
It only takes a few minutes to save hours (or even days) of work
Make a Zap!
Popular Zaps for
All My Apps (3)
Following 3 apps
Post new Gmail emails to a Slack channel [Business Gmail Accounts Only]
Use This Zap
Get Slack notifications for new email matching Gmail search query (such as, from:boss@work.com) [Business Gmail Accounts Only]
Use This Zap
31
Post approaching Google Calendar events to a Slack channel
Use This Zap
1-3 (of 1,769)
[redacted]@gmail.com
Welcome to your Professional trial!
These features will expire in 11 days:
Zaps with 3 or more steps
Access to our 50+ Premium Apps
Advanced filtering and logic
...and much more
Upgrade Now
Tasks
0 / 1000
Settings
Developers
Log out

2 How to create a Zap

BY MELANIE PINOLA

Key points

- **Templates** are like blueprints for popular Zaps. They help you get set up fast, and you can tweak them later.
- You can **find new templates** and get recommendations on our **Explore** page.
- **Use the Zap editor** to build completely custom workflows.
- **Edit and manage Zaps later** by locating them on your ***Dashboard***.
- **Collaborate on and share Zaps** with a **Team account**.

In the next chapter, we'll cover **how to build workflows** with three or more steps.

In this guide, we'll walk you through creating your first Zap—an automation between web apps—to do repetitive tasks for you.

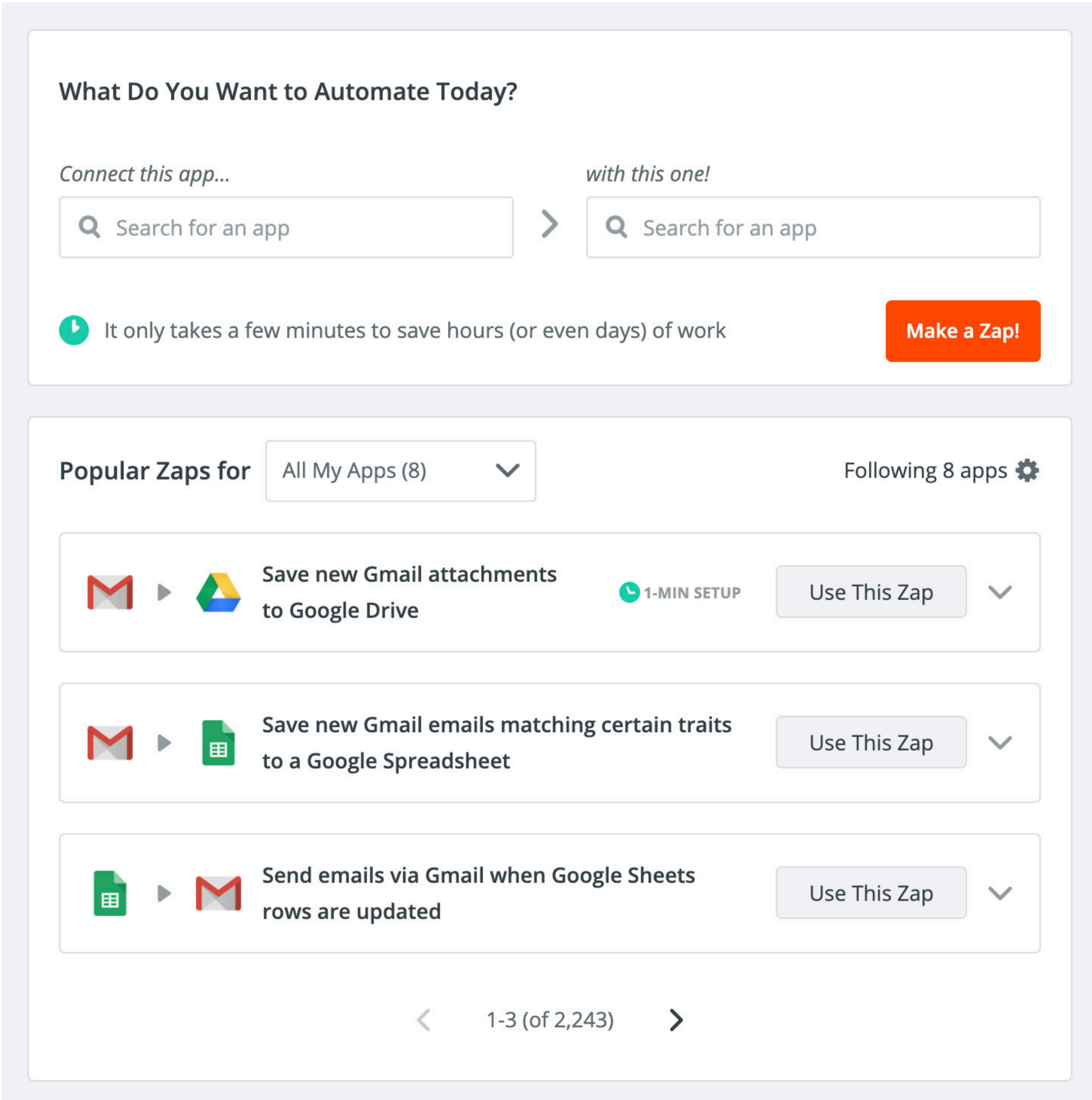
There are two ways you can create a Zap: You can use Zap templates—pre-built workflows—or create your own Zap from scratch if you need more customization.

- Add a Zap template to your account
- Create a Zap from scratch

Add Zap templates to your account

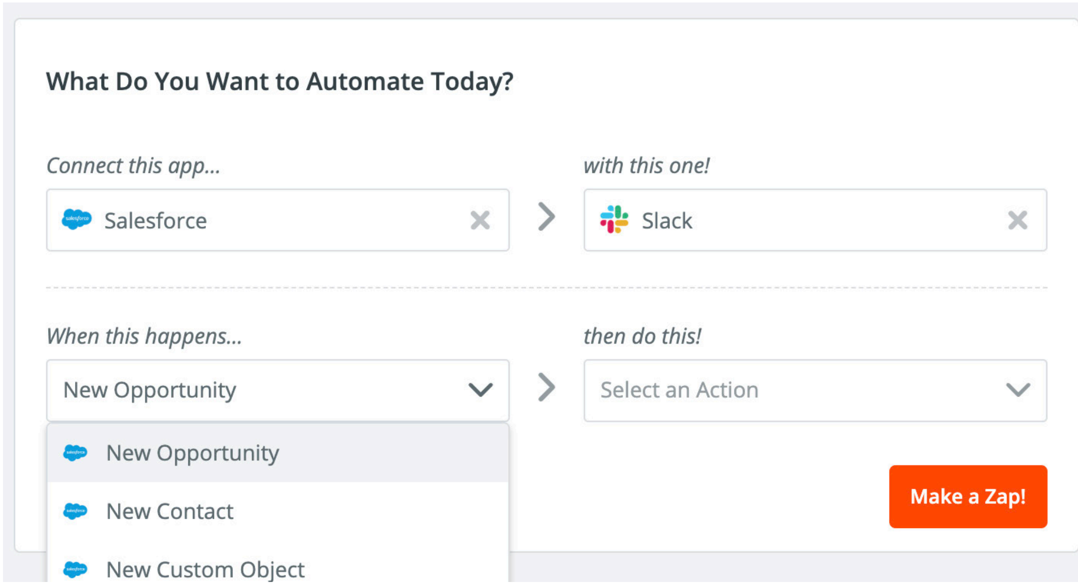
We've built thousands of Zap templates that you can quickly use with your own account and adapt to your own needs. Here's how to add one:

Step 1: Go to your ***Dashboard***, then type in the name of the app you want to create a Zap for in the *Connect this app*... field.

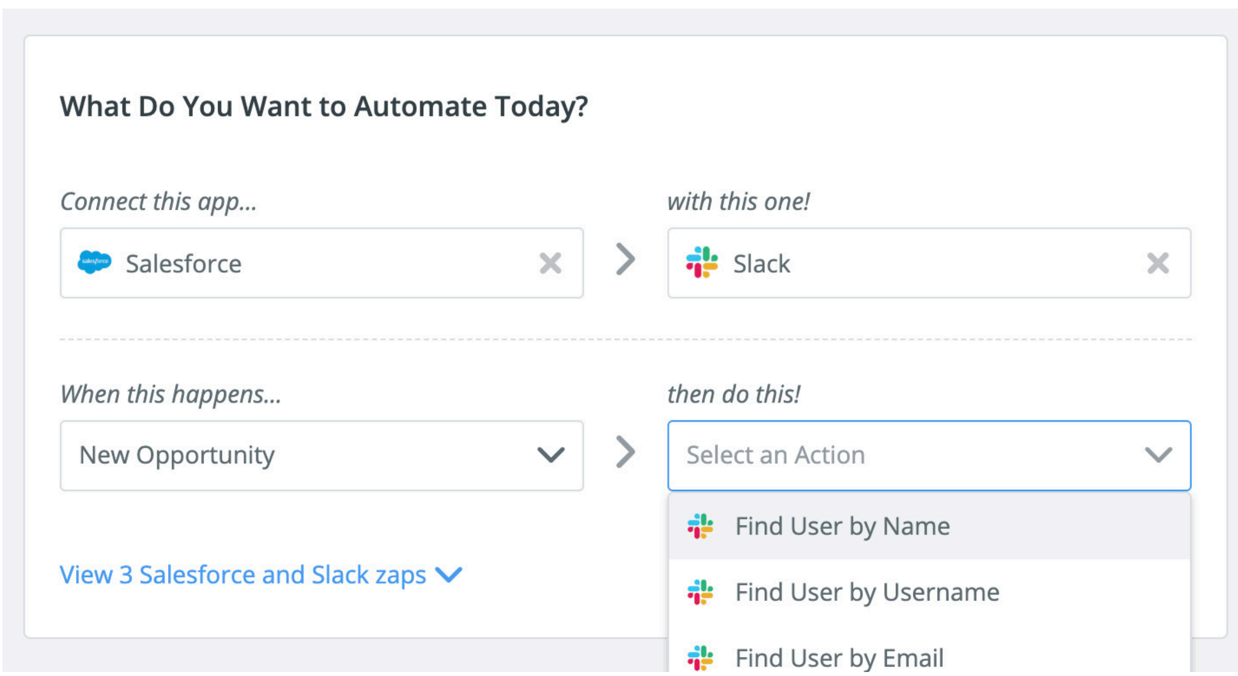


Step 2: Then type in the name of the app you want to connect to your first app in the *with this one!* field and click **Make a Zap**!

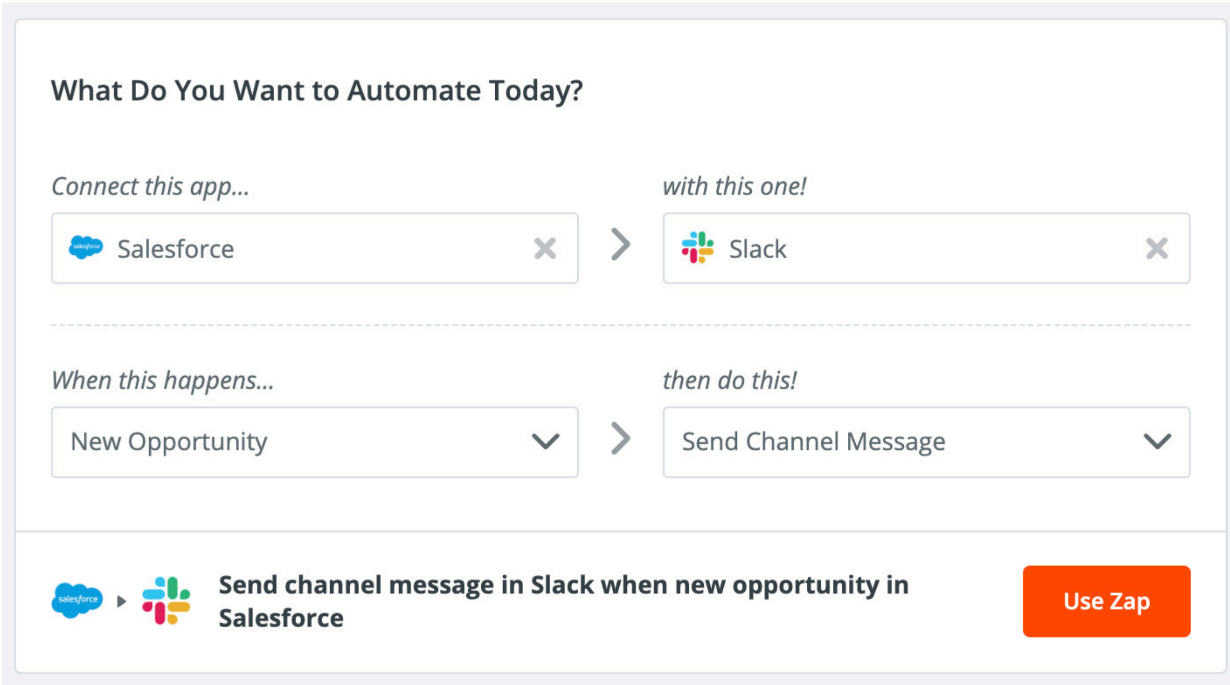
Step 3: Next, select a trigger for your Zap. The trigger is what you want to kick off your Zap. For example, you could choose **New Opportunity** in Salesforce as a trigger.



Step 4: Choose the action that you want to happen whenever the trigger occurs. For example, you might want to send a Slack message to a channel every time there's a new opportunity in Salesforce.

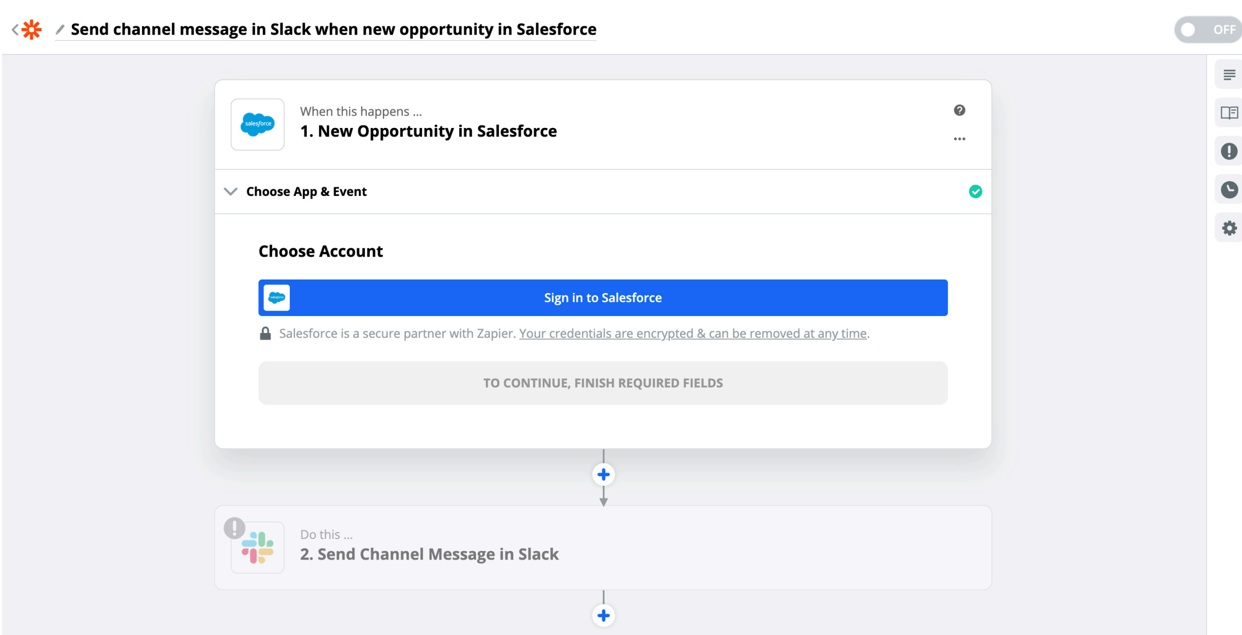


Step 5: Scroll down to see popular Zaps involving those triggers and actions.



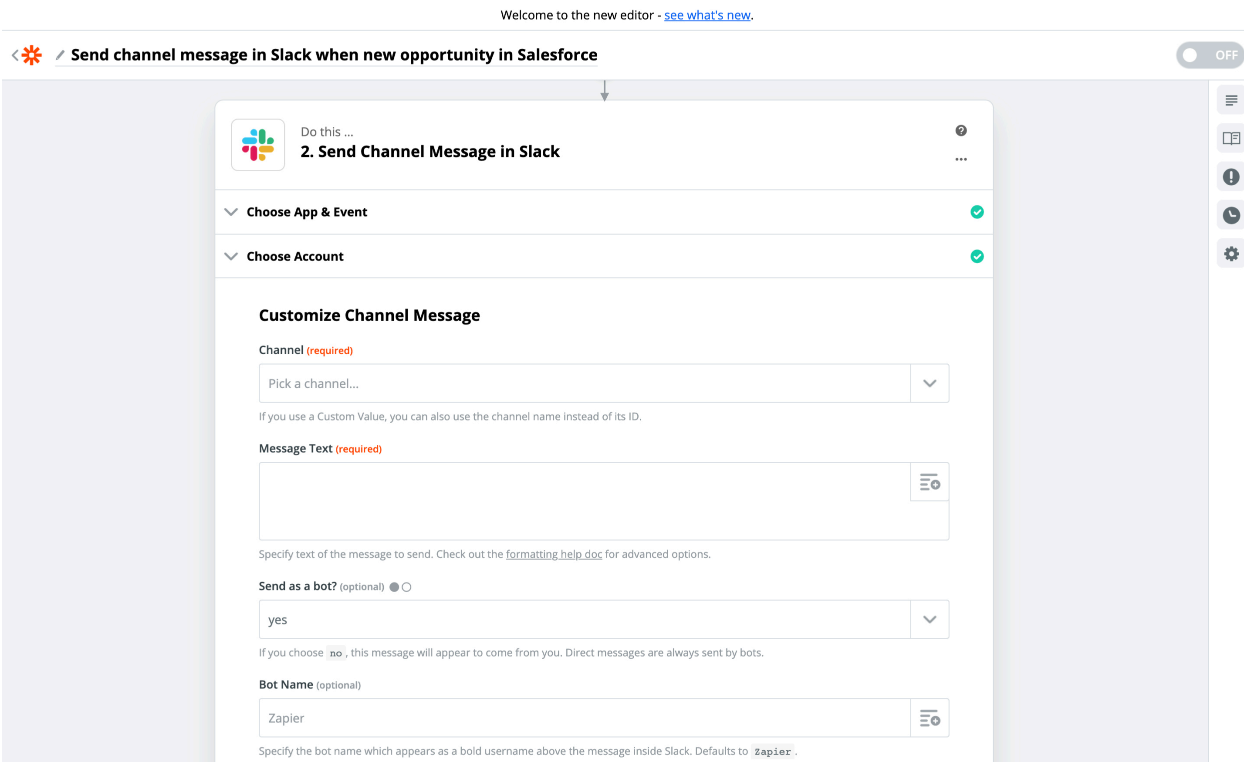
Step 6: Click Use Zap to start editing the template in the Zap editor.

Step 7: Click the Sign in button to link your account in the app to Zapier for the first time. If you've previously connected the app to Zapier, select it from the dropdown menu of apps.



Step 8: In the following steps, when prompted, select the optional or required fields for each app in your Zap. This helps you customize the Zap template and tells it the

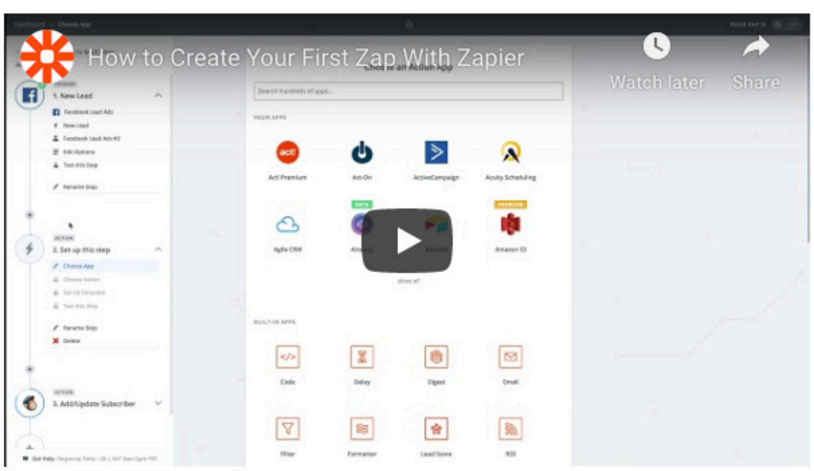
exact data you'd like to use. For example, with Slack, you'll need to select the specific channel you want the Zap to send messages to. You can also customize optional fields, such as the name and profile image displayed along with these messages.



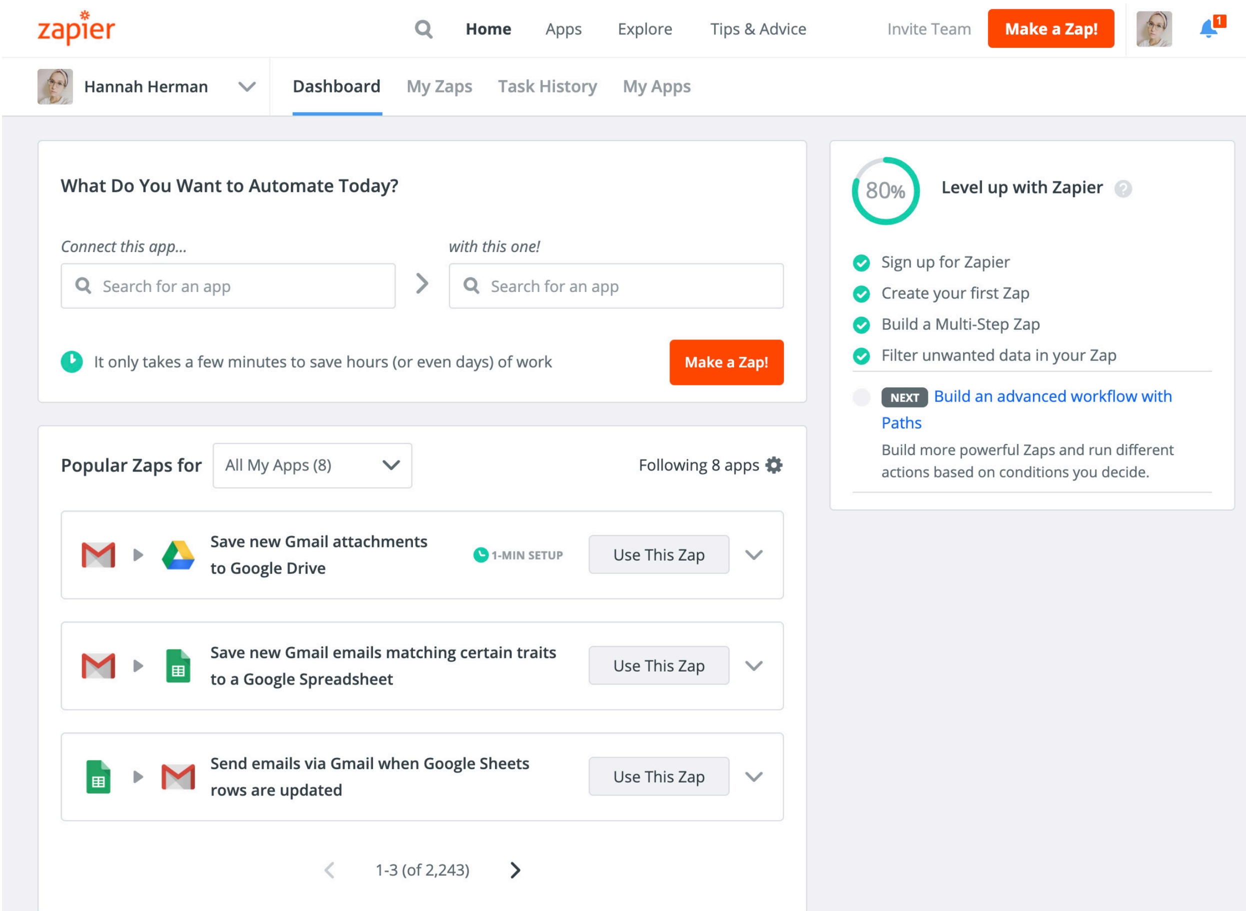
Step 9: Click Finished Editing! to add the Zap to your account and turn it on. You'll also have the option to test the new Zap to see how it works.

You'll find your newly created Zap on the ***My Zaps tab*** if you want to make any changes later.

Create Zaps from scratch



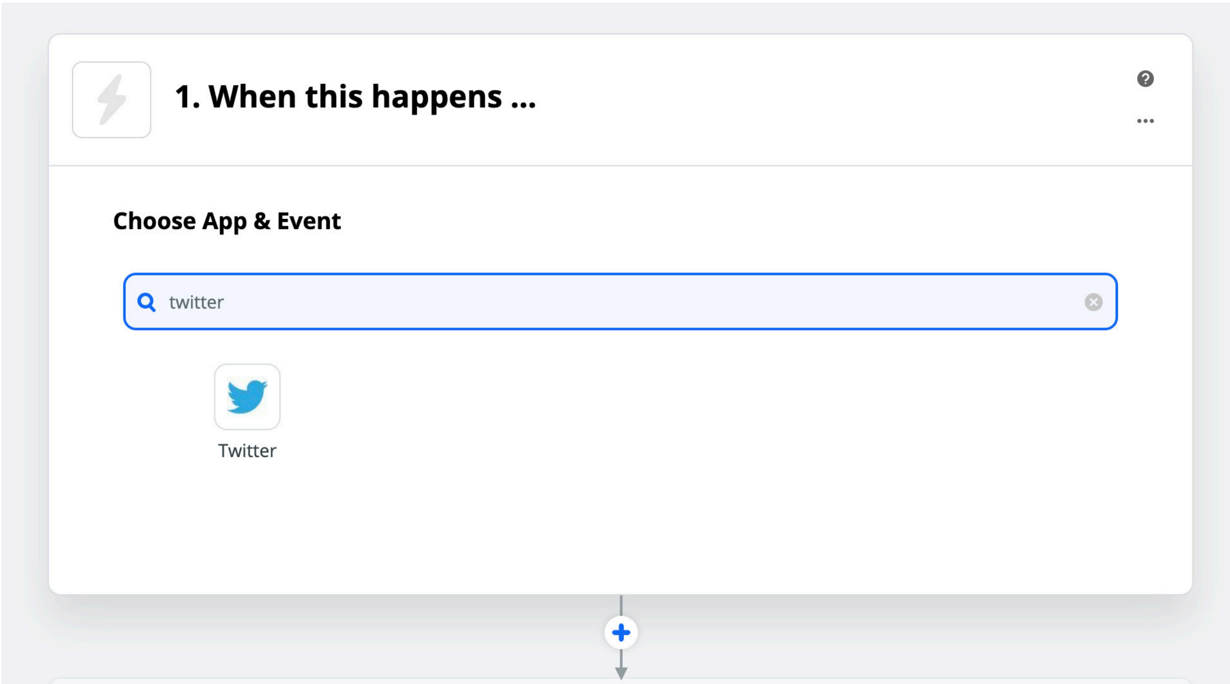
For the most customization, you can create a Zap from scratch. To get started, click **Make a Zap**!, which is in the top right corner of the page once you log into Zapier.



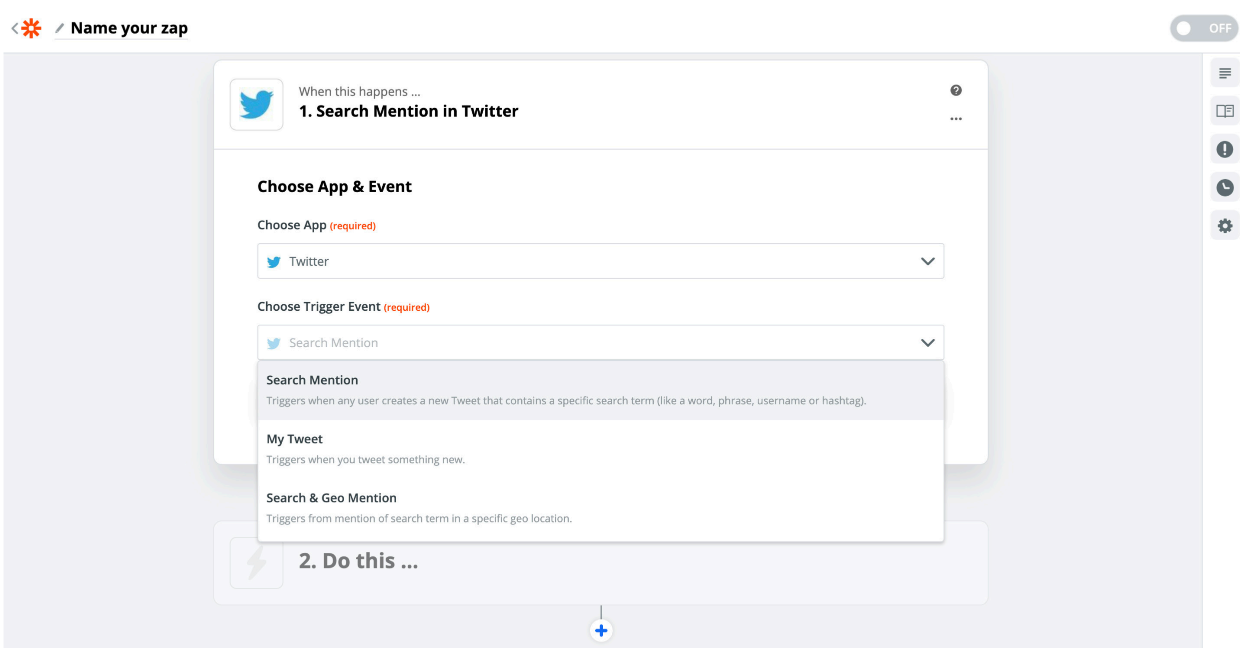
Now you'll be in the Zap editor, where you can set up the trigger and action of your Zap.

Setting up the trigger

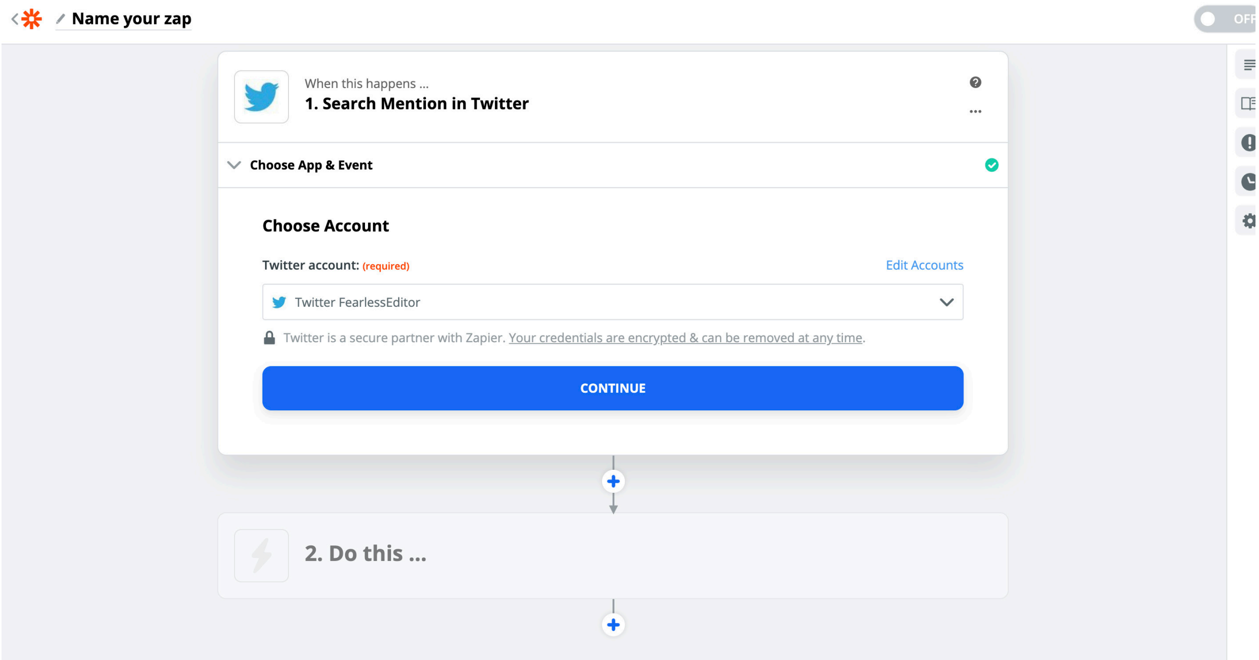
Step 1: First you'll pick the trigger app, which is the app that you want to start the Zap. Enter the app's name in the search box or, if you've already connected apps to Zapier, click on the app icon shown here. In this example, we'll use Twitter as our trigger app.



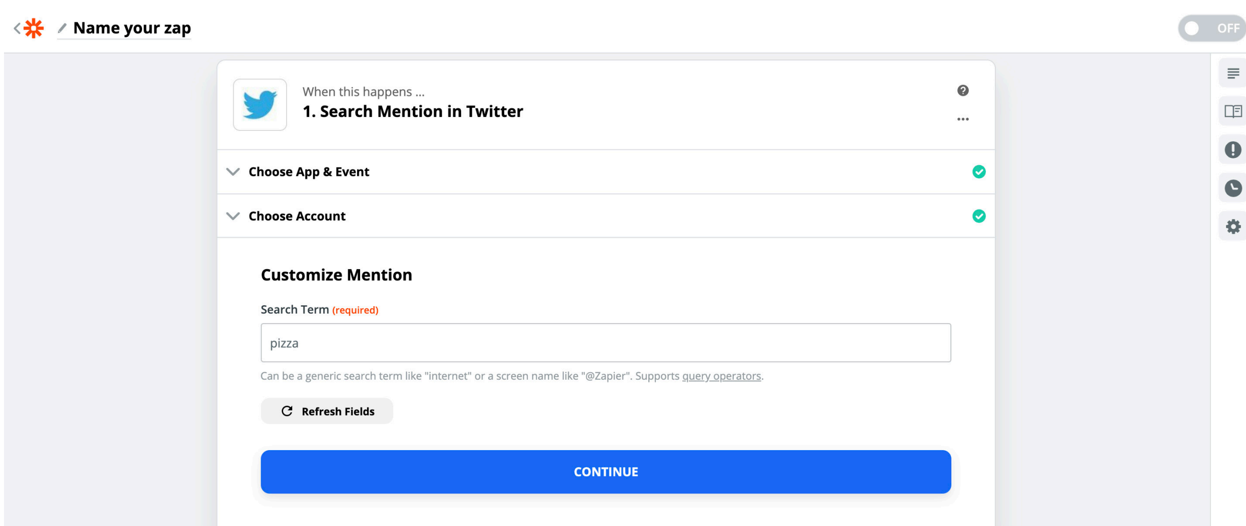
Step 2: Pick the specific trigger for the app from the list of options. Trigger examples can include events like *New Email Received*, *Document Updated*, or *Changed Spreadsheet Row*. For our example, let's select **Search Mention** to find any new mentions for a specific search term. Then click **Continue**.



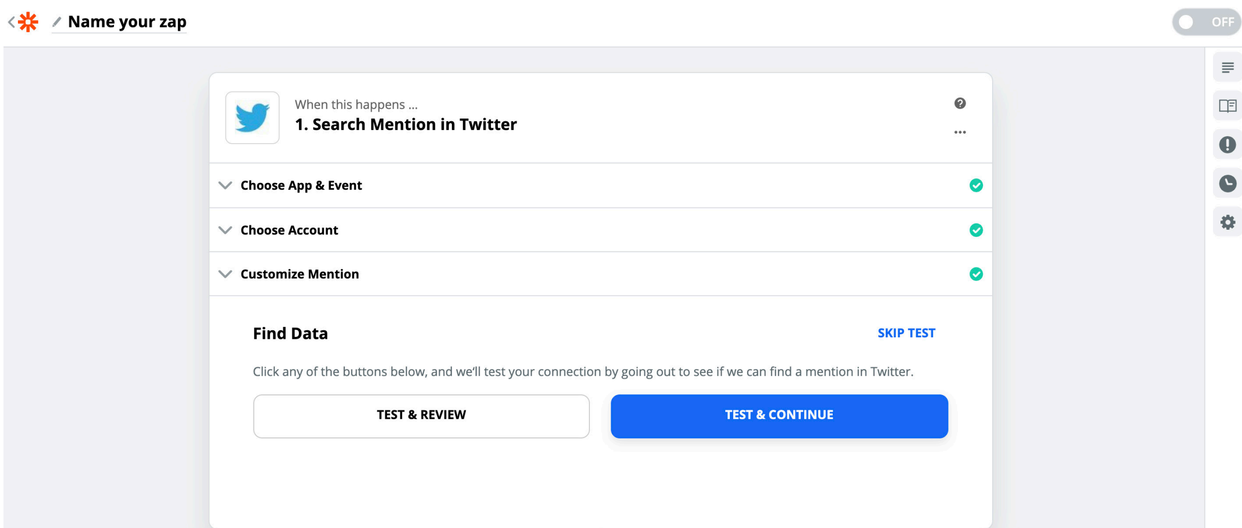
Step 3: Now you need to connect or select your account. Choose an account that is already connected to Zapier or click the **Sign in to** button to add a new account. A pop-up will appear, prompting you to authorize Zapier to connect to the app. Click **Continue**.



Step 4: If there are fields or other app options that you can or must include in the Zap, you'll set those up in this step. For example, you might specify the label for Gmail, the spreadsheet, or the folder in Dropbox needed for the Zap to work the way you want. In this example, we'll enter the Twitter search term we want to monitor. Then click **Continue**.



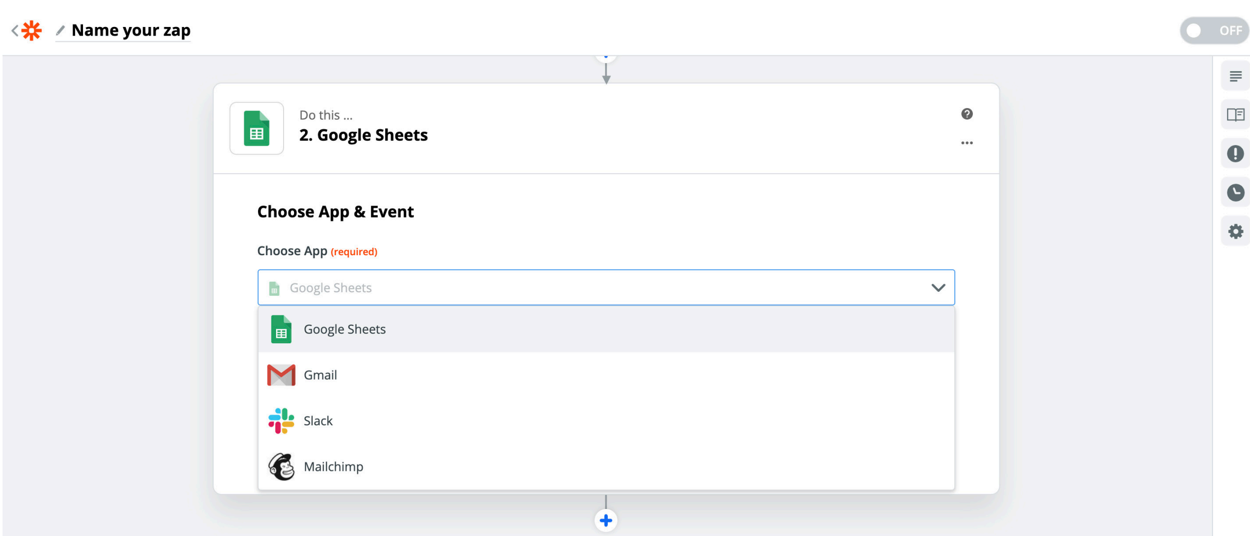
Step 5: Next you'll need to test your step to make sure it works correctly. In the step, you'll see which information from the app will be used for the trigger. Click **Test & Continue** to make sure the trigger works. Wait for the success message before proceeding to the next step.



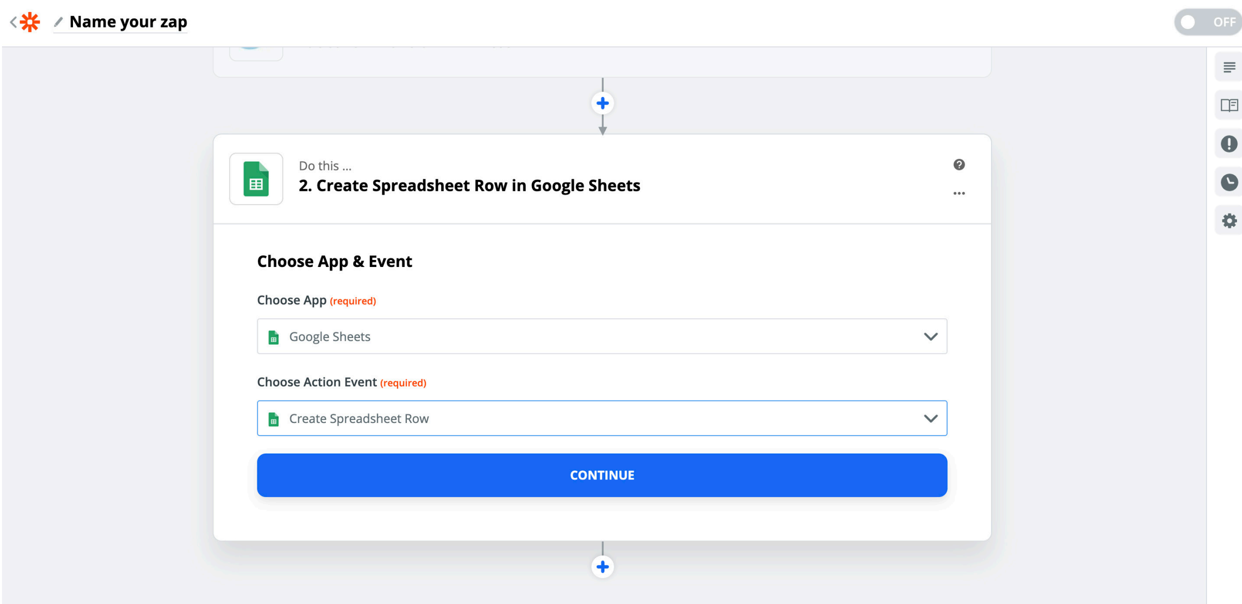
Setting up the action

Now it's time to tell the Zap exactly what you want it to do.

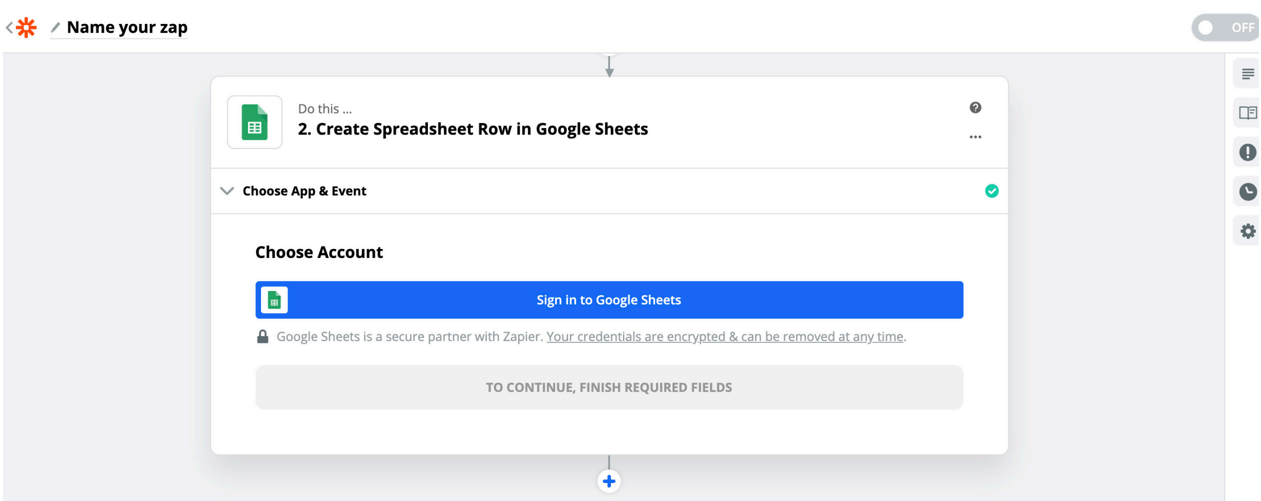
Step 1: First you need to choose the action app. Type in the name of the app you want the action to be applied to. It can be the same app as your trigger app or a different one. In this example, we'll use Google Sheets.



Step 2: Next you need to choose how you want the app to behave in response to the trigger. Action examples include *Update a Calendar Event* or *Send an Email*. In this example, we'll choose **Create a Spreadsheet Row**. Then click **Continue**.



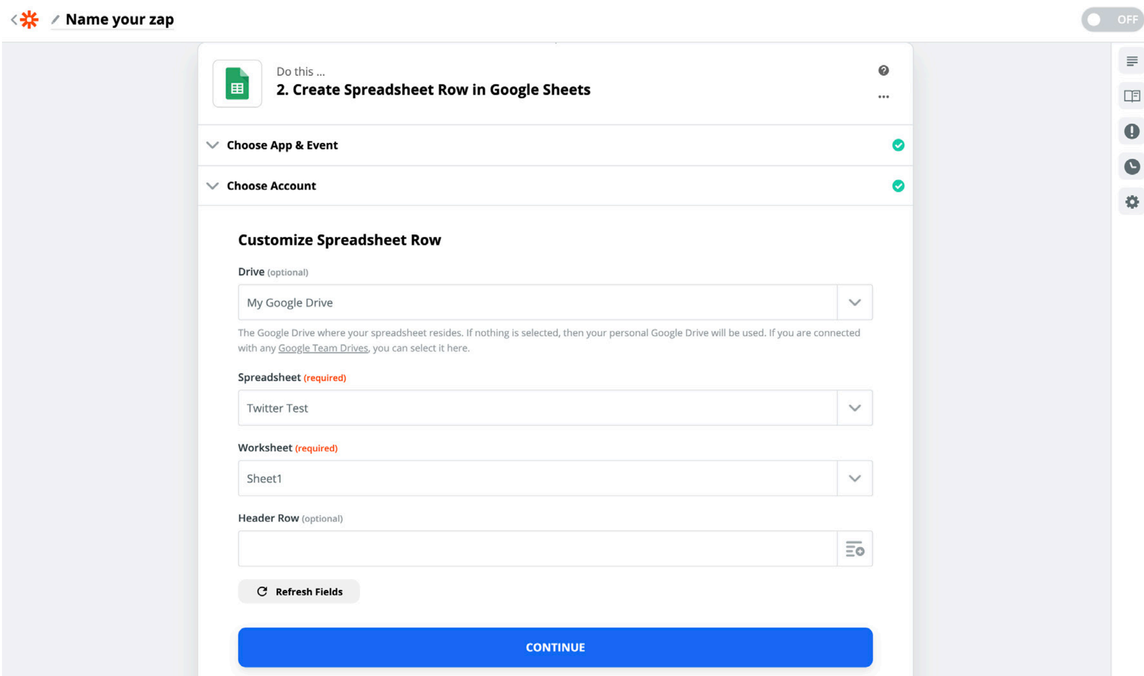
Step 3: Now you need to connect or select your account. Choose an account that is already connected to Zapier or click the **Sign in to** button to add a new account. A pop-up will appear, prompting you to authorize Zapier to connect to the app. Then click **Continue**.



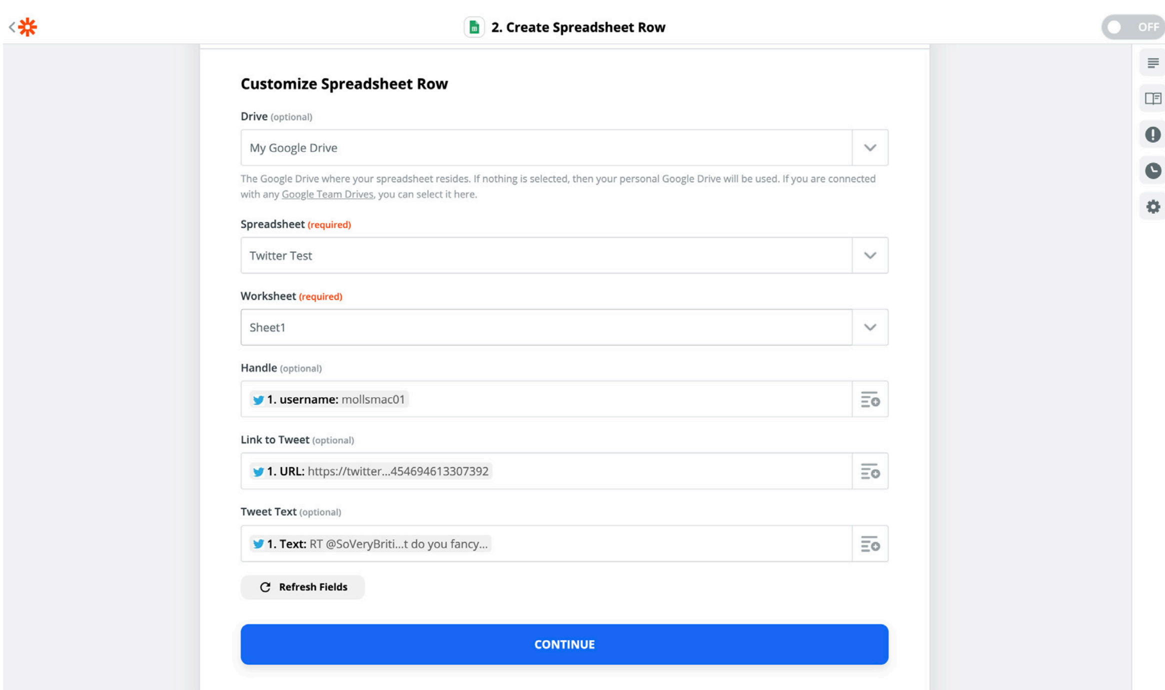
Step 4: Now is the spot where you can customize your Zap. In this step, you can tell the Zap exactly what you want it to do with the data from the trigger app by filling in the blank fields here. Use the dropdown menu on every field to tell the Zap to pull in data from the trigger step.

Once you click on the dropdown menu, a list of data from your trigger app will appear. You'll likely want to choose the data points from your trigger app that most closely match the field in your action app.

Some fields are required. For example, if your action is to update Google Sheets, you'll need to select which spreadsheet and which worksheet you want to update.



Other fields are optional but often still important to fill out. In this example, in the *Handle* field in Google Sheets, we'll choose the *Username* field from Twitter. That way, the Zap will put the correct Twitter username into the *Handle* column in the spreadsheet. Similarly, we'll match the *Tweet Text* column in Google Sheets with the *Text* field from Twitter.

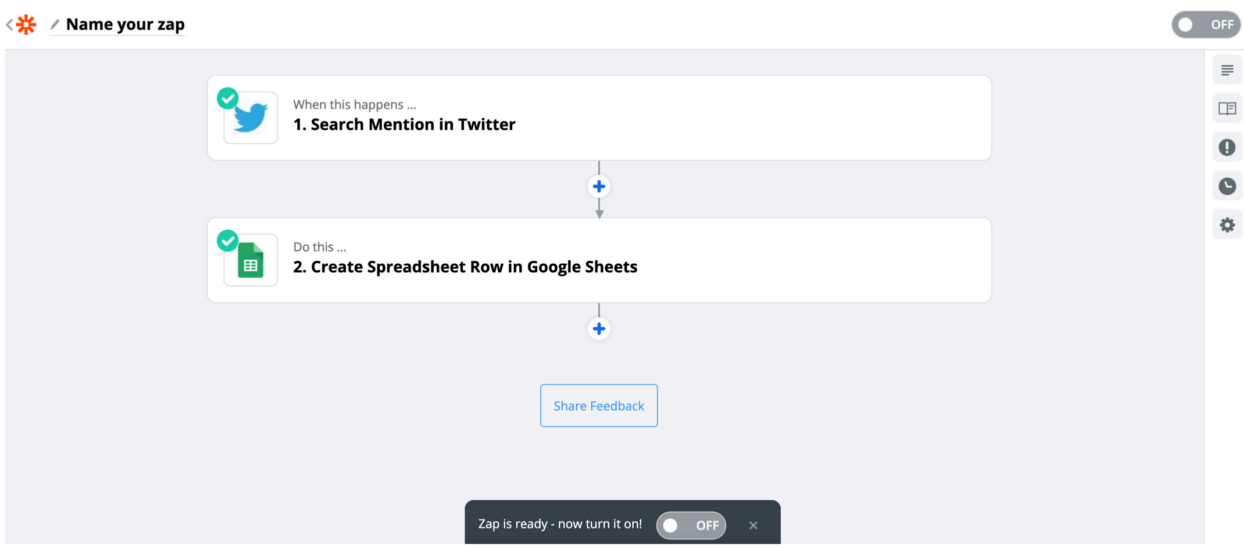


For some fields, you can also enter the information directly rather than selecting it from a dropdown box or by clicking the plus sign (+). For example, in an email field, type in an email address. Or in a description field, type in any text.

Once you've made your choices, click **Continue**.

Step 5: Now we'll test the action. You'll see which information from the trigger app will be sent to the action app. Click the **Create & Continue** button to make sure this step works as intended.

Step 6: Finally, click the **Done Editing** button. Be sure to give your Zap a name by clicking the pencil in the top left corner of the editor. Then toggle the *On/Off* button at the bottom of the page to **On**. Your Zap will run automatically from now on until you turn it off.



Come back to your Zap at any time to edit the steps or change specific details. You'll find all of your Zaps on your ***My Zaps tab***.

Share Zaps with your team

Now that you have a Zap up and running, it's time to spread the automation power to the rest of the office by setting up a **Team account**.

Team accounts come with shared folders that let the whole team view, update, or copy Zaps. Collaborate to make workflows more efficient or tweak Zaps to fit each team-mate's workflow. Here are a few ways we've seen teams use Zapier to free up time:

- How the Hotjar team creates databases automatically with Zapier + HubSpot
- Automated analysis: How Customer IO minimized data entry with Zapier

- Efficient design: How the InVision team uses Zapier to save 10 hours of work a week
- Build a better connection: How Intercom's product education team collaborates with support

Team accounts have more time-saving features such as sharing apps connected to Zapier, an unlimited number of Zaps, premium features for every member, enterprise security, and much more. **Learn more and create a Team account here**.

3 Maximize your productivity with multi-step Zaps

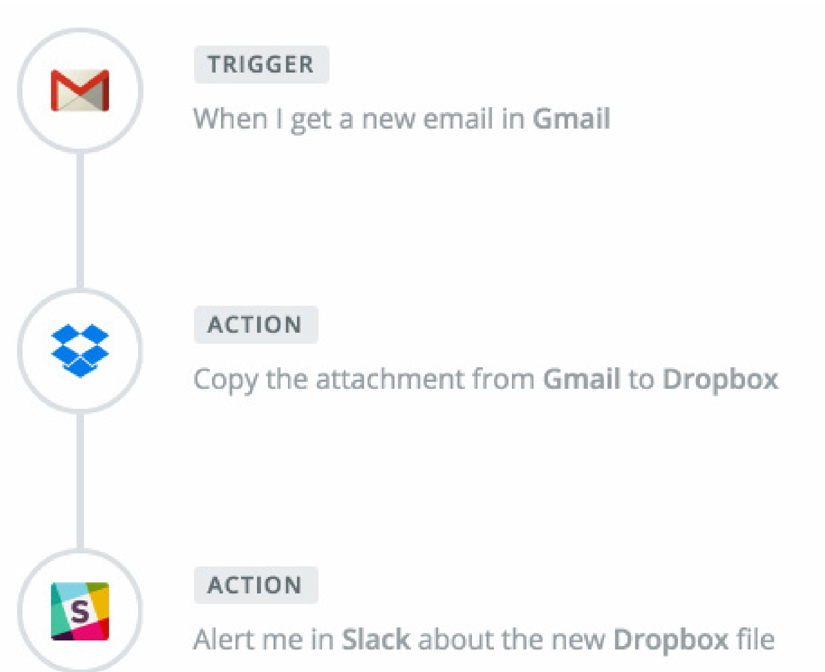
BY CARLIN SACK

Key points

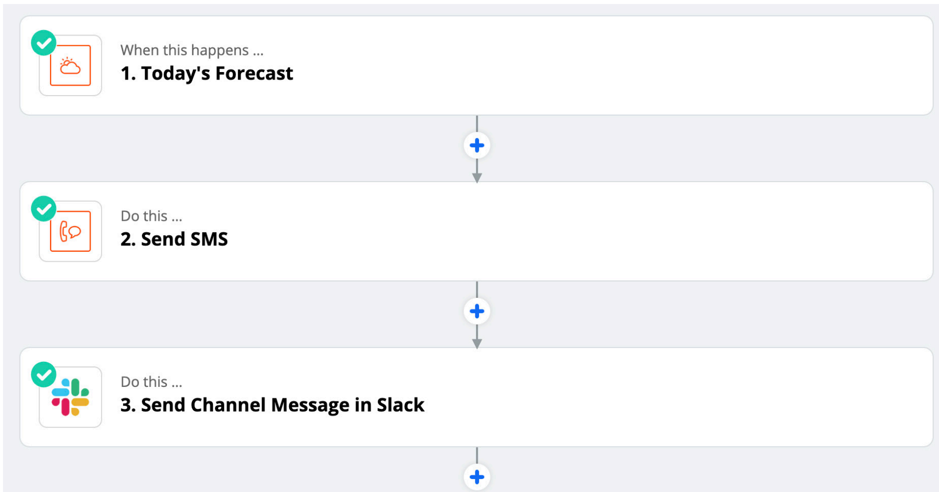
- **Multi-step Zaps** let you automate multiple tasks with a single trigger.
- **Add a new step** by clicking the + icon between steps, or at the bottom of a workflow.
- **Information flows down**. You can use data from an earlier step in any following step.
- **You can always extend a workflow** by adding more steps to your Zap.
- Add **step names and a description** to clarify how a Zap works.

In the next chapter, we'll cover how to look up data on the fly using **search actions**.

Once you have your Zap set up, you can take it one step further (literally). Add more action steps to the Zap so it does even more for you automatically. A Zap with more than two steps is called a multi-step Zap.



For example, you might have a Zap set up that notifies you of the daily weather via SMS. You can add a step to that Zap so that it also notifies your team with a Slack channel message. You can see that this Zap now has multiple actions, which are all based on the same trigger. When the Zap runs, it will do both actions.

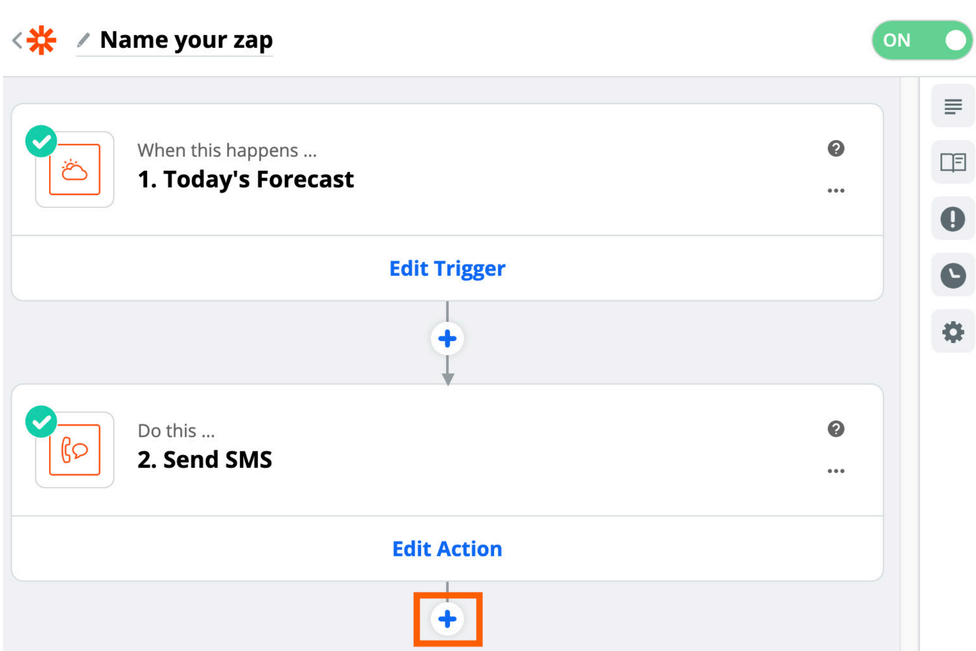


You can add as many steps as you need to your Zap so that it works best for you. The more steps you add to a Zap, the more manual work Zapier takes off your plate and the more time you save.

Here's how to add more action steps to your Zap:

Step 1: Click on the Zap you want to change on your ***My Zaps*** page.

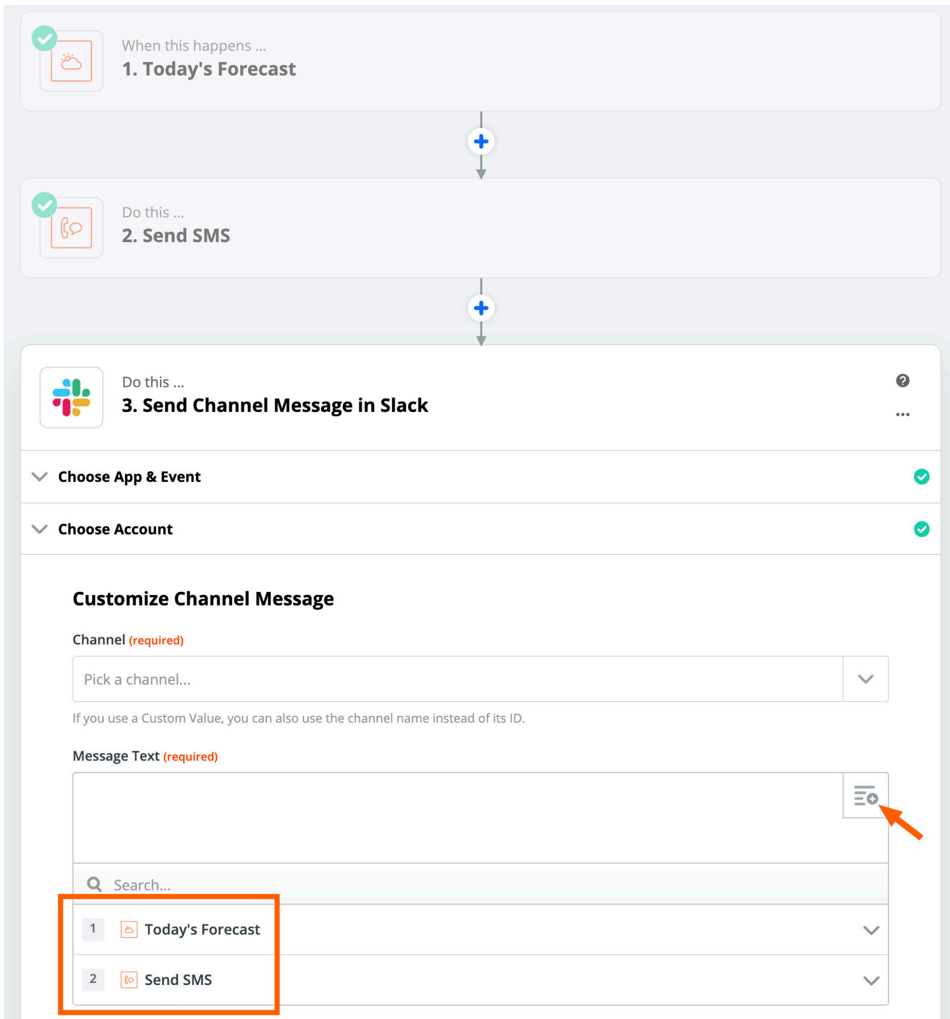
Step 2: When the Zap opens in the editor, click the blue + icon where you want to add the new step. Keep in mind that when the Zap runs, it will go through each step in the order shown in the editor, from top to bottom.



Step 3: Then select or type in the name of the app you want to add to your Zap.

Step 4: Connect your account.

Step 5: Customize how the data is sent from your trigger step to your new action step using fields from either or all of the previous steps.



Step 6: Finally, test your Zap, and toggle the *On/Off* button to **On**. Now, sit back and let your Zap take care of multiple tasks at once.

Adding multiple actions onto a Zap isn't the only way to take advantage of multi-step Zaps. You can add in steps called **filters** or **search actions**, too. We'll cover more about those steps in the following chapters.

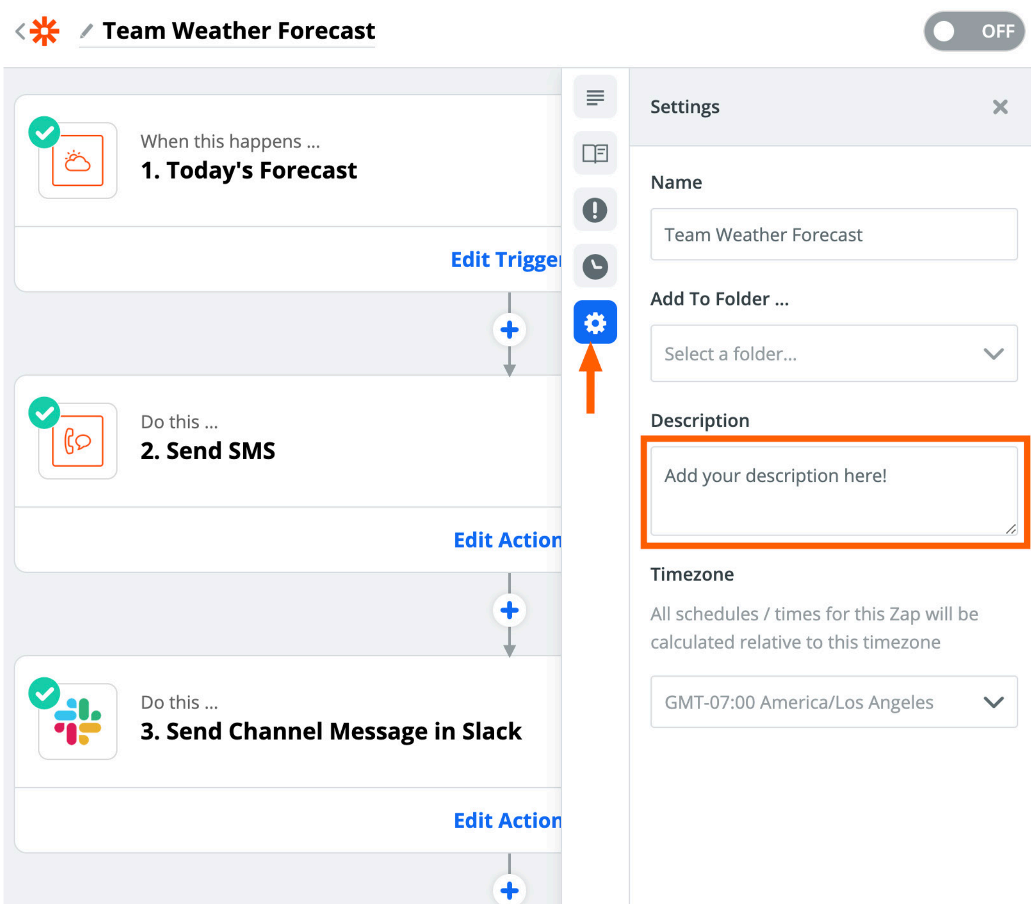
Pro tip: Add a description and rename your steps

When you can build workflows with as many steps as you want, there's a chance they can get... complicated.

More automation power is always good. But sometimes you need guideposts to help you navigate Zaps with many similar steps.

Do your future-self a favor and include reminders about how your more intricate workflows work. Adding extra context is easy: Either add a description to your Zap, or rename the steps in your process to describe what each one does. (Or, feel free to do both!)

To **add a description**, click the **gear** icon in the right sidebar to open the Settings tab. Add any needed context to the Description box.

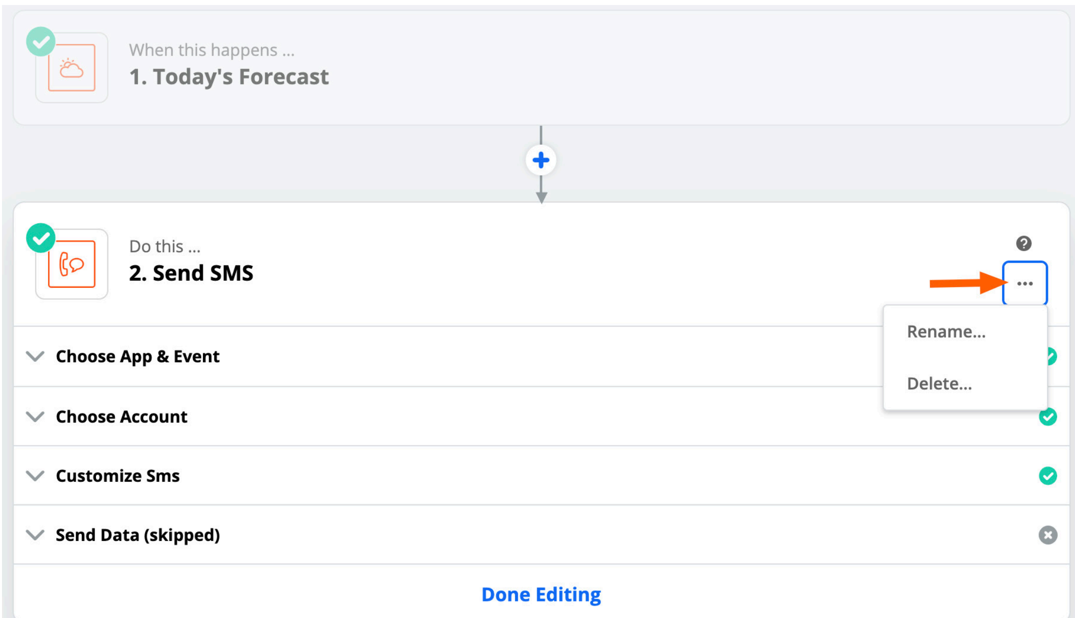


Once you're satisfied with your composition, click the **X** to close the Settings menu. Don't worry, your description will automatically save (and you can always change it later).

Descriptions are great for summaries of how a Zap fits into your work, logs of any changes you make, and ideas about improving the workflow. Or, if you share an account with other people, descriptions give them a quick idea of what each Zap is used for.

Step names, on the other hand, are labels for each chunk of your workflow. They're more visible than descriptions, but offer less space. Each step in your Zap is numbered, and you'll find the name of a step next to its number on the left.

We do our best to pre-fill that slot with helpful info. If you want to customize the label on a step, though, click a step to expand it, open the step's menu, and click **Rename**.



Good step names describe the purpose of the step. For example, if you have multiple steps that send emails to different teammates, you might call your step Send to contact@zapier.com.

4 Find data in your apps with search actions

BY CARLIN SACK

Key points

- **Search actions** let you find info in one app and use it later in the same workflow.
- **Searches are tailored to the app**. You can track down things like names, email addresses, lists, events, spreadsheet rows, and tasks, depending on the tool.
- **Some search actions include create options**, which let you create a new entry if a search comes up empty.
- **Update info on the fly** by uncovering items with search actions.

In the next chapter, we'll cover how to use **filters** to choose if and when your Zaps run.

Your Zaps should be customized to work best for you. That means you might want to set up a Zap that doesn't just look for data as it comes into an app, but also uses previous data.

That's where search actions come in. Search actions look up data in an app, so you can use it later in the same Zap. You tell the Zap what data to look for, and the Zap finds it and puts it to use.

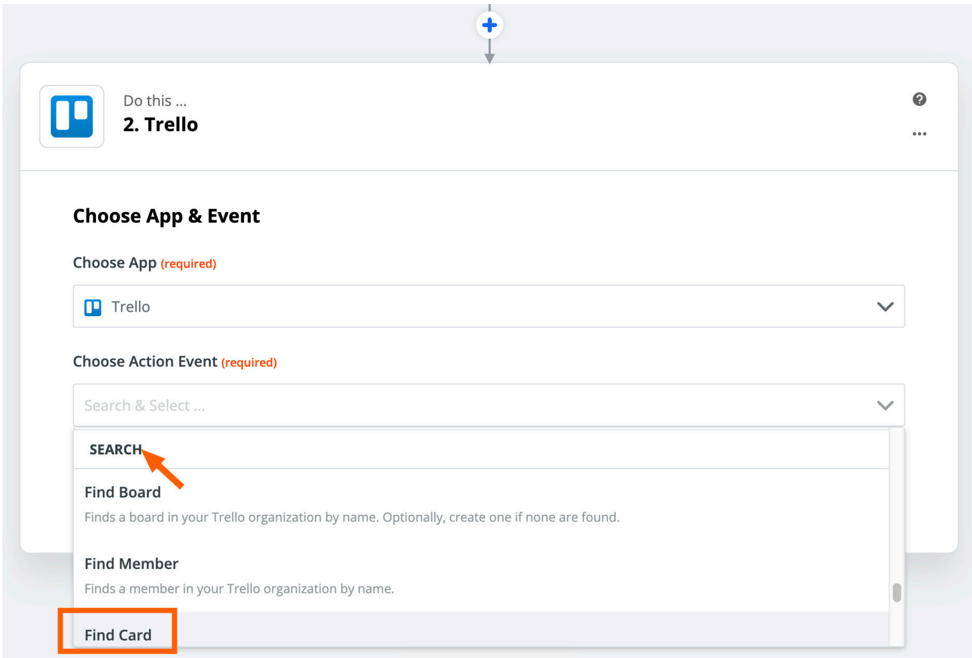
For example, every time one of your customers fills out a form, you want to add a comment to a different card on Trello depending on how the customer filled out the form. In order to update an existing card, you'd need a way to first find that card based on some criteria. That's exactly what search steps are for.

Here's how to add a search action to your Zap:

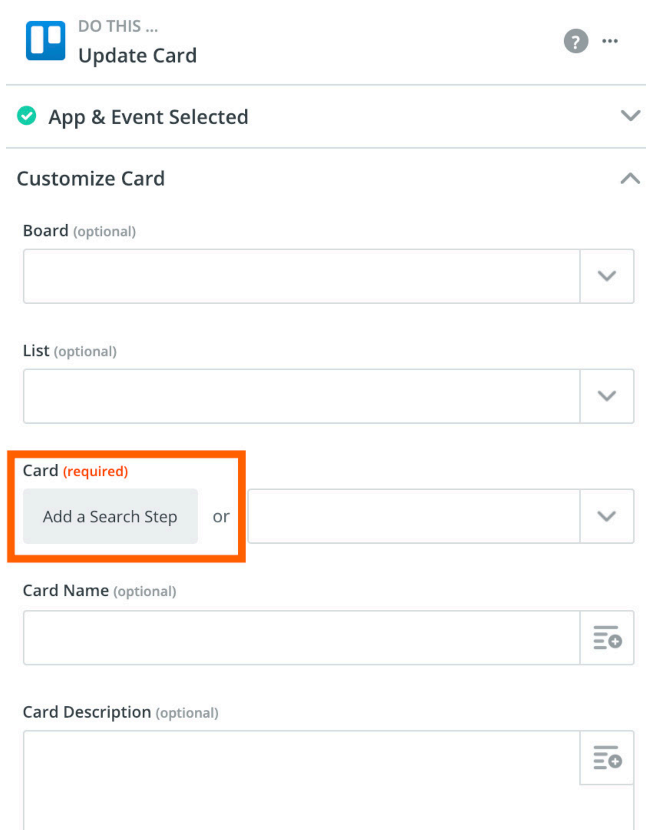
Step 1: Set up your Zap trigger. (If you need a refresher on how to set up your trigger, see our previous chapter on **how to set up a Zap**.)

Step 2: Now you need to add your action step where the search action will take place. In the Zap editor, click the **+ icon** to add your new action step. Search for and select the app you want to search for data in. In our example, we've selected Trello.

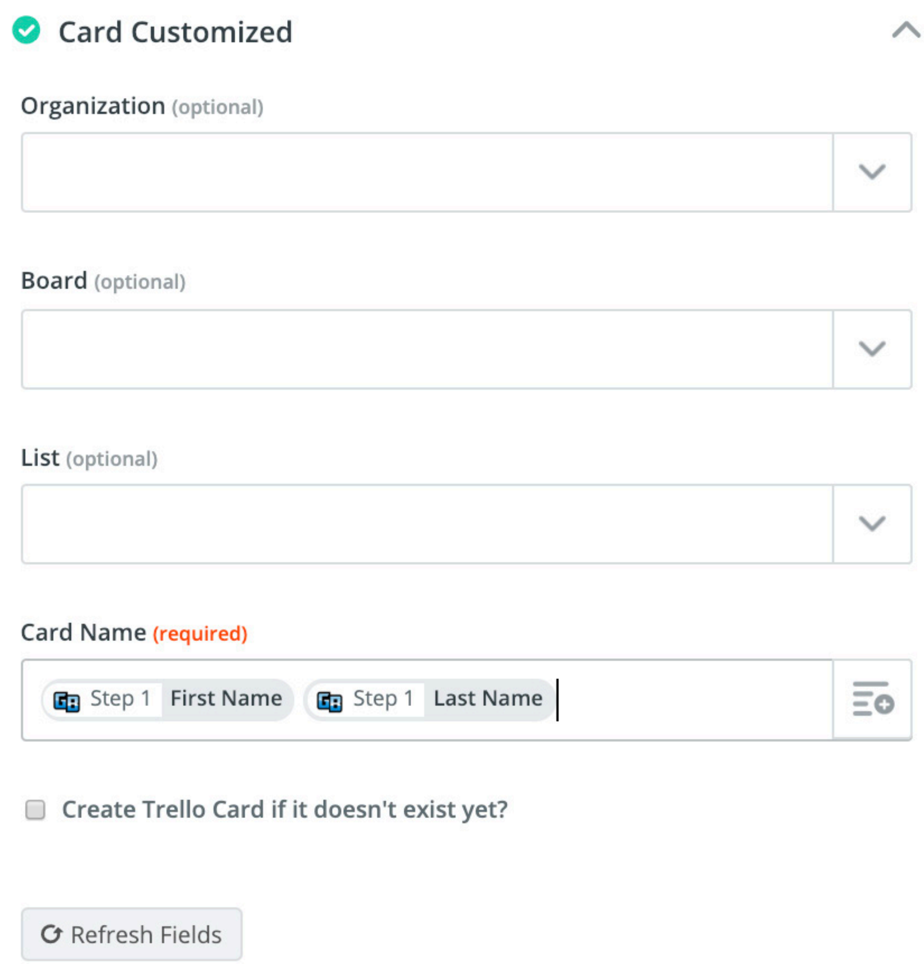
Step 3: Click the **Choose Action Event** dropdown menu. If your app has any available search actions, they'll appear in a *Search* section. Select the search action you want to use.



Note: Some apps have search steps within actions. If you click **Add a Search Step**, it will automatically create a new search step.



Step 4: Next, tell the Zap exactly what data you're looking for by filling in the fields. Different apps have different options available on this screen. The cool part is, you can use data from a previous step (e.g., your trigger) in order to tell the Zap what to search for in this step. To add data from an earlier step, click the **dropdown menu** and select the value. If not, you can enter a search string into the field.



In addition to looking up existing data, some search actions also have the ability to create the data (if it doesn't already exist). You can tell if an app has this ability by looking for the *Create [item] if it doesn't exist yet?* checkbox while setting up the search action step.

Once you check that checkbox, fill in the fields with the values you want to use for the new record. Then click **Continue**.

Step 5: After you've filled in the fields, click **Fetch & Continue** to make sure the step works and see what data it just found or created.

If the data you're looking for is found (or created), the test will be successful, and the Zap will move onto the next step.

If the Zap doesn't find the data you're looking for and you didn't check the checkbox telling the Zap to create the data instead, then the Zap will not proceed to the next step. You can choose to either skip the test, or create a record that would match the search term you used and test the search step again.

Step 6: After setting up your search step, you can now insert the data into a later action step, or set up an action step to update the data found by using **custom values**.

5 Filters: Set conditions for your Zaps

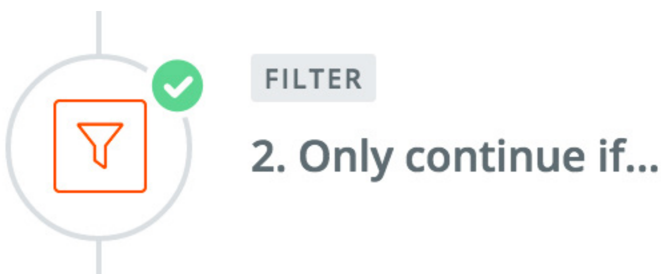
BY CODY JONES

Key points

- **Filters** are extra steps that act as traffic cops for your data.
- **Workflows only continue if** the conditions you pick are met.
- **Zaps stop immediately** when the requirements of a Filter are not met.

In the next chapter, we'll cover how to harness the power of **Zapier's built-in apps**.

By default, Zaps will run every time new data is found to match your trigger. By inserting a filter step into your Zap, you can tell the Zap to run only if your data matches certain criteria.



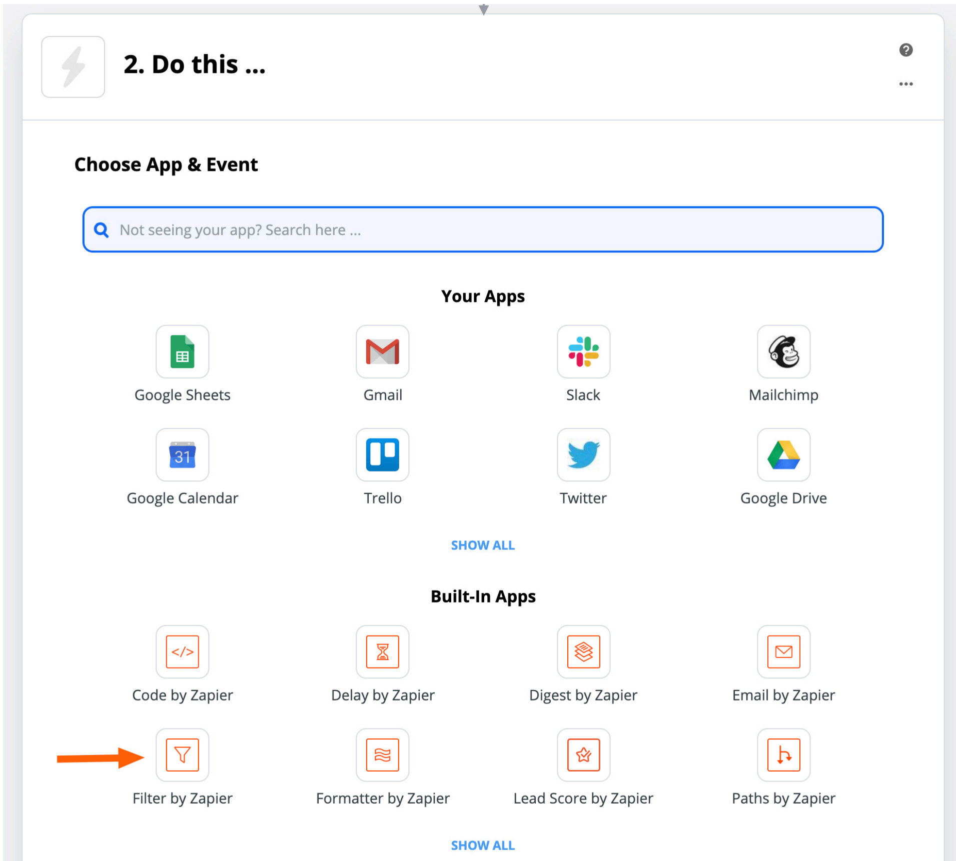
This is especially useful when you need to do something very specific in your workflow, such as add people that buy a product to a specific marketing list, notify your team on Slack when a customer feedback rating comes back as negative, or save emails that contain the word "receipt" to Dropbox.

Filters essentially work as stop signs, allowing you to stop Zaps based on specific conditions.

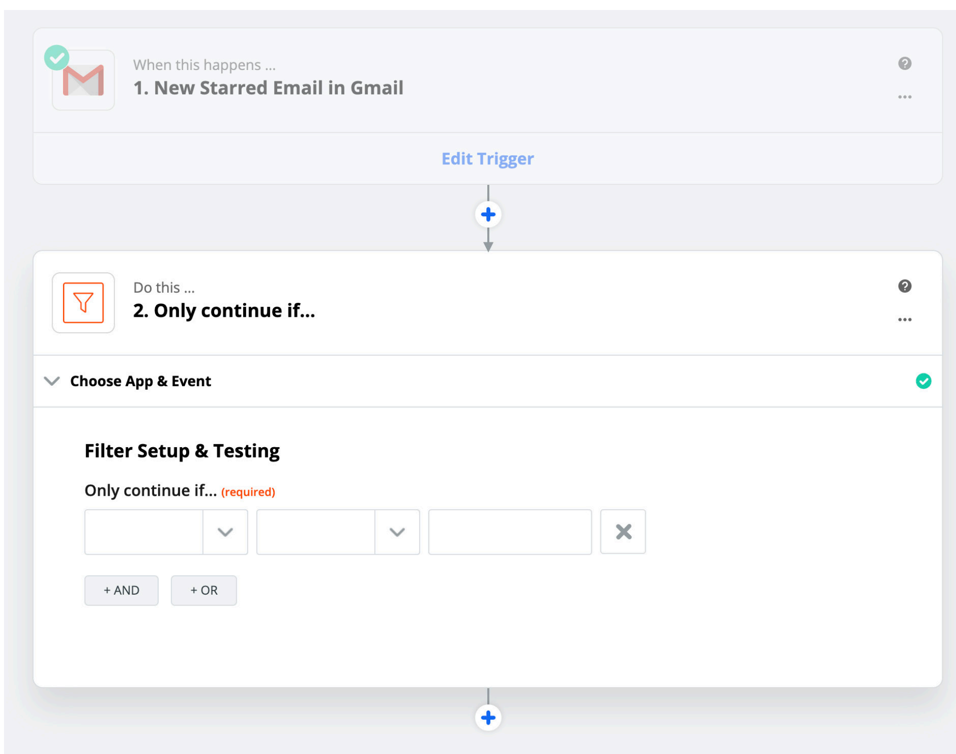
How to set up a filter

Filters can be easily added to any Zap.

Step 1: After you have added a trigger to your Zap you can add a filter by selecting *Filter by Zapier* for your second step.

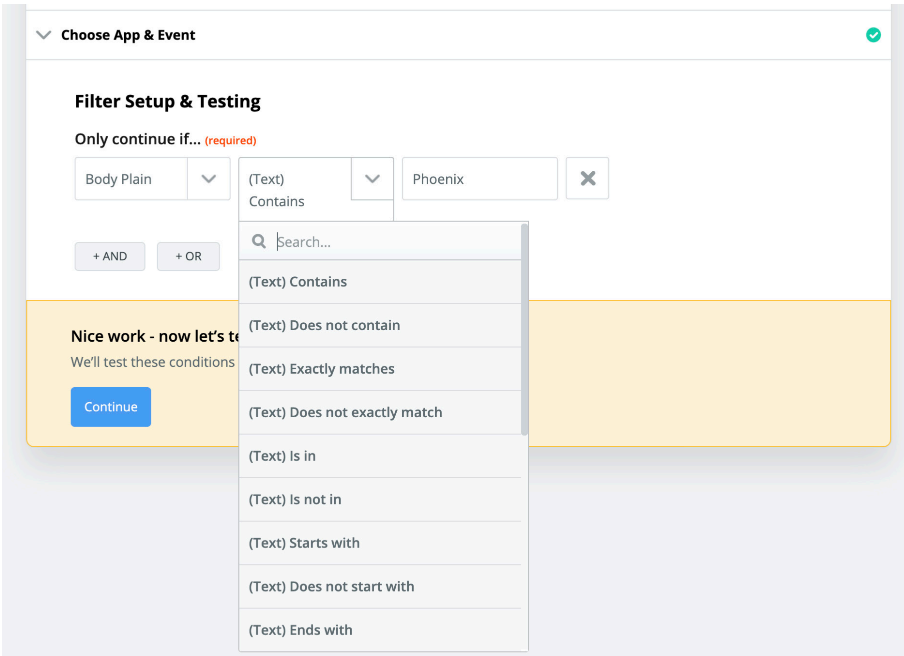


Now you will see the configuration page that allows you to set up your filter:

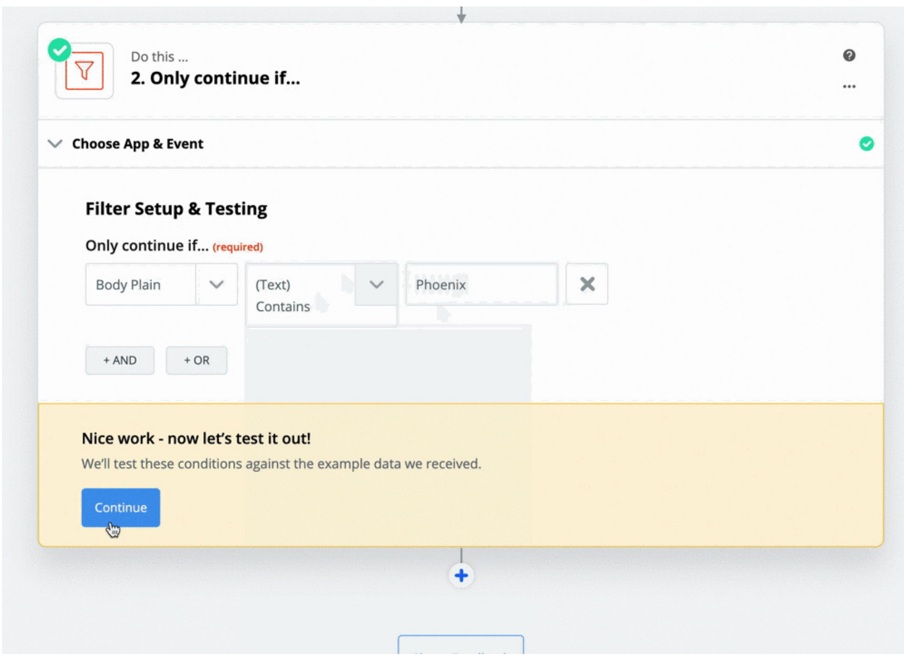


Step 2: Click on the first dropdown menu which tells the Zap which field or fields to watch. When the dropdown menu opens, you'll see all the available fields from the trigger step. For example, we've selected *Body Plain*, but other options such as *Date, Subject Line*, or *Email Address*, might be available depending on the app data.

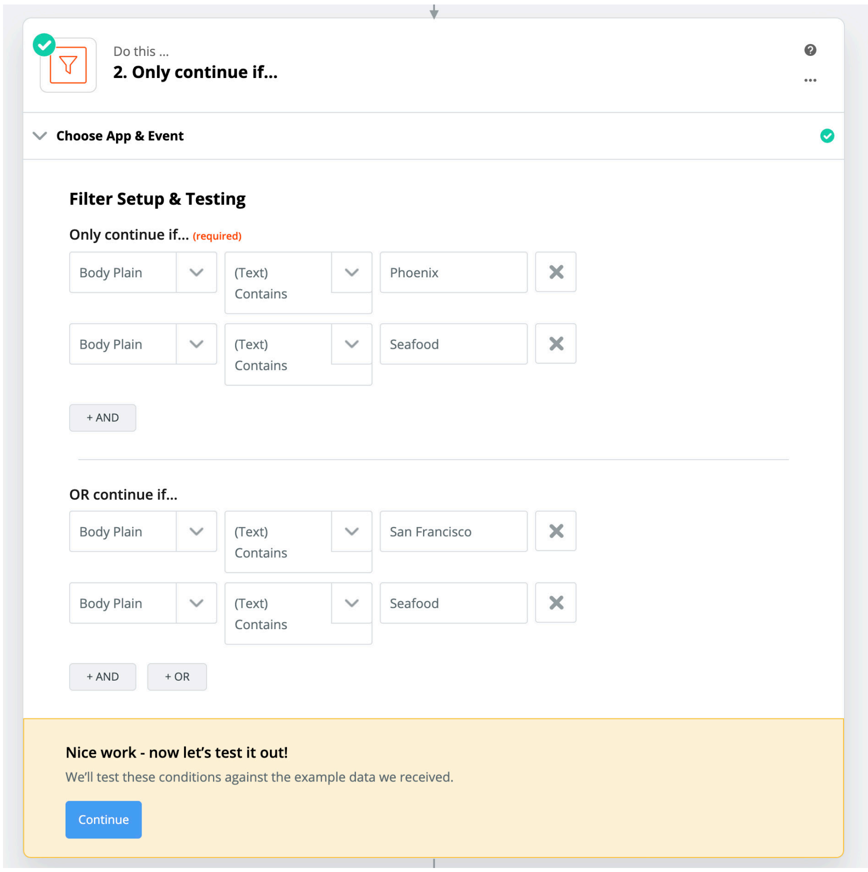
Step 3: Once you have selected your field, choose the filtering option that best suits your needs in the second dropdown menu. Zapier supports text, number, date/time, boolean (yes/no), and does/does not exist.



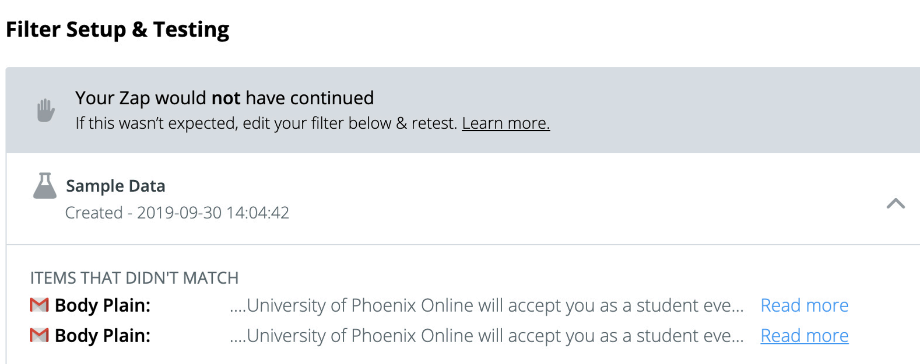
Here's an example filter where the Zap will only trigger when the *Body Plain* field contains the word "Phoenix":



Step 4: Optional: You may want to add multiple criteria to your filter to further refine your results. The *And* option allows you to further refine your search (as shown below), while the *Or* option expands your criteria to include additional results that will trigger your Zap.



Step 5: Once you have finished adding your criteria, click *Continue* to see the logic at work using your test data. In our example, due to the criteria, the Zap will not run.



Next you can add your action, which will now only run if your criteria are met. Feel free to add filters to any of your favorite Zaps to create the perfect workflow.

6 Harness the power of Zapier's built-in apps

BY NICK SIMARD

Key points

- **Built-In Apps** are tools created by the Zapier team that anyone can use in their workflows.
- Apps like **Email** and **SMS** help you **build Zaps faster**, since you won't need to sign up for a separate service.
- **Manipulate data** like dates, names, and email addresses on the fly with our **Formatter** app.
- **Send Zaps at the right time** with apps like **Schedule** and **Delay**.

In the next chapter, we'll cover how to **explore your Task History and troubleshoot Zaps**.

In addition to **adding a filter** to your Zap to make sure it proceeds only when a certain condition is met, Zapier also offers a variety of other built-in apps to help you create more powerful, useful, and customized Zaps. Here are some great ones to get started with.

- **RSS** lets you watch an RSS feed for new entries.
- **Email** helps you send data from any app to your inbox.
- **SMS** let's you send info from an app in a text.
- **Schedule** will trigger your Zaps on a schedule you set.
- **Formatter** is a multi-tool for transforming your data.
- **URL Shortener** creates short, ready-to-share URLs.
- **Push** is a Google Chrome extension that lets you trigger workflows from anywhere online.
- **Lead Score** will find any contact information from an email.
- **Delay** puts your Zap on hold *until* a certain time, or for a certain amount of time.
- **Translate** automatically changes text into a language of your choice.

- **Zapier Manager** gives you some extended options for keeping up with news about your Zapier account.
- See the full list of **Built-In Apps by Zapier**.

RSS

RSS (really simple syndication) is pretty much the industry standard for feed readers, which gather online content from blogs and other sites that use RSS. **RSS by Zapier** enables you to detect new items in RSS feeds, as well as power your own Zapier RSS feed.

TRIGGERS

- **New item in feed** triggers whenever there's a new item in an RSS feed.
- **New items in multiple feeds** triggers when there is a new item in any of the feeds you've set your Zap to watch.

ACTIONS

- **Create item in feed** lets you build a custom, Zapier-powered RSS feed that you can use anywhere.

Try these use cases

- Whenever there's a new post on your favorite blog, automatically share a link to it on Facebook, Twitter, or your other social media accounts.
- Create your own RSS feed from items that you've liked or favorited across the web.
- Share new RSS items with your teammates on Slack.

Email

Send and receive email via a custom Zapier email address at zapiermail.com with **Email by Zapier**. Zapier's email app includes the ability to add attachments, BCC/CC people, and use HTML.

TRIGGERS

- **New inbound email** triggers when you forward an email to your custom zapiermail.com address.

ACTIONS

- **Send outbound email** automatically sends a message on your behalf.

Try these use cases

- Send a customized, automated email to customers or clients when they buy one of your products.
- Email new SurveyMonkey survey answers to an email address of your choice.
- Send emails into Slack to share with your team.

SMS

Using **SMS by Zapier**, you can send a limited number of SMS / text messages from our built-in number.

ACTIONS

- **Send SMS** sends a text message to a phone number of your choice.

Try these use cases

- Send yourself a text message every time you receive an email from a specific person.
- Create a system of text message reminders in combination with **Schedule by Zapier**.
- Send a thank you text message to everyone who signs up for your webinar.

Schedule

Schedule by Zapier can be used to set recurring tasks. Trigger an action at a time you choose every day, every week, or every month. You can also trigger actions hourly. If you're a developer, this is similar to a crontab, cronjob, or cron.

TRIGGERS

- **Every hour** triggers hourly on the hour.
- **Every day** triggers once a day at a time you choose.
- **Every week** triggers once a week on a day you choose.
- **Every month** triggers once a month on a day you choose.

Try these use cases

- Add tasks to a project management tool on the first of every month.
- Create weekly items in your favorite to-do app.
- Create a system of daily text message reminders in combination with **SMS by Zapier**.

Formatter

Data isn't always in the format you need. **Formatter** enables you to work with text, numbers, date/time, and more!

ACTIONS

- **Text** lets you do things like find and replace phrases, remove HTML, and capitalize strings.
- **Numbers** puts a calculator in the middle of your Zap. You can convert currencies, complete simple math operations, and more.
- **Date / Time** makes it easy to reformat dates, or add and subtract time from a date.
- **Utilities** is a smorgasbord of transformation options, including things like looking up a value in a table and picking a random value from a list.

Try these use cases

- A date is in International format, but your app needs it in American format.
- Convert text to title case to be used as an email subject.
- Truncate text when sharing to social media apps that limit the number of characters.
- Turn Markdown text into HTML for your blog.

URL Shortener

URL Shortener by Zapier helps you turn long, distracting links into short, ready-to-share URLs. You can shorten any URL in your Zaps and pass it to your social media pages, in an SMS, or to other apps you have connected on Zapier.

ACTIONS

- **Shorten URL** takes any URL and provides a more succinct stand-in.

Try these use cases

- Create short URLs for your Zapier or Twilio SMS, so they stay within the character limit.
- Share your blog posts with shortened URLs to your social media accounts on Facebook, Twitter, or LinkedIn.
- Whenever a new file is uploaded to Dropbox or Google Drive, create a short URL and save it to a Google Sheet.

Push

Push by Zapier lets you trigger Zaps from anywhere on the web. It's a **Google Chrome Extension** that lives in your browser, and lets you activate one-click workflows instantly.

TRIGGERS

- **New push** puts your workflow in motion with a single tap.
- **New push with fields** lets you add a URL or string of text to send to your action app.

Try these use cases

- Add URLs to a read-it-later service, like Pocket or Instapaper.
- Create custom tasks for your to-do list without breaking your focus.
- Post info to a spreadsheet or database.

Lead Score

Lead Score by Zapier lets you find a contact's information—like their name, company, company size, industry, and location—among other useful information with their email address. It also scores the customer fit of the person to help you find those who are most likely to convert.

ACTION

- **Find person and company information** finds person and company data and qualification based on an email address.

Try these use cases

- Personalize email profiles in email marketing apps, like Mailchimp, AWeber, and Emma.
- Enrich CRM data in Pipedrive, Salesforce, and HubSpot.
- Get more info on a new newsletter subscriber from Typeform, Wufoo, and Google Forms.
- Score new leads from lead generation campaigns with HubSpot, Mailchimp, and Mailjet.

Delay

Put your actions on hold for a specified amount of time before sending data to another app with **Delay by Zapier**.

ACTIONS

- **Delay until** pauses your Zap until a specific date and time.

- **Delay for** puts your Zap on hold until some amount of time passes, like an hour or a day.
- **Delay after queue** can be used after an already existing delay in a Zap. It waits for a set amount of time after the last delay in a given queue and is used to deal with race conditions and rate-limiting.

Try these use cases

- Send a thank you email to clients exactly one week after they've paid their invoices.
- Create a series of follow-up emails that are sent a specified number of days apart.

Translate

Translate by Zapier lets you automatically translate words, phrases, and web pages into over 100 languages.

ACTIONS

- **Translate text** takes a string of words and spits it out in a language of your choice.
- **Detect language** returns our best guess for the original language of the provided text.

Try these use cases

- Create multiple versions of an outgoing email, written in various languages.
- Translate incoming help desk tickets into your team's predominant language.
- Translate new blog posts into different languages.

Zapier Manager

Use the **Zapier Manager app** to manage your Zaps and Zapier account. Keep track of your Task usage, track Zap errors, invite members to your Team, and more.

TRIGGERS

- **New public app** triggers every time we add a new public app to Zapier.
- **New team member** triggers when a new team member is added to your account if you are a **Zapier for Teams** account user.
- **New halted Task** lets you know when a Task in your account is halted.
- **New folder** triggers when a new folder is added to your personal or Team account.
- **Task usage limit reached** triggers when your Task usage hits a set percentage or number of your plan's included Tasks.
- **Zap turned off** lets you know when a Zap in your account has been turned off or paused.
- **New Zap error** triggers when one of your Zaps hits an error, so you can fix it ASAP.
- **New Zap** triggers when you add a new Zap to your account, so you can let the whole team know.
- **New invoice** lets you know when your account has a new billing invoice.

ACTIONS

- **Turn Zap on/off** switches your Zap on or turns it off in specific circumstances.
- **Create Team invitation** invites a new member to your Zapier Team account.

SEARCHES

- **Find app** searches for any public App on Zapier.
- **Find Zap** looks for any Zap in your account.

Try these use cases

- Receive an email when a new app is supported by Zapier.
- Send yourself a notification when you're close to reaching the monthly Task limit for your Zapier account.
- Automatically send an email to new team members inviting them to join your Team account.

7 Explore your Task history and troubleshoot Zaps

BY HANNAH ROCHAU

Key points

- Your **Task history** is a log of everything that Zapier tried to automate on your behalf.
- **Statuses** show whether your Zap was successful, got stopped by a filter, hit an error, and more.
- **Searching your Task history** helps you track down specifics using the info in your Tasks.
- Users on paid plans can **replay Tasks** that run into errors.

When Zapier's running happily in the background, you should see that reflected in the records created or updated in your apps. Once in awhile, though, something might go wrong and you'll need more information. Or maybe you just want to check that your Zap is running correctly. Your Task history gives you a place to see everything that's been done by your Zap.

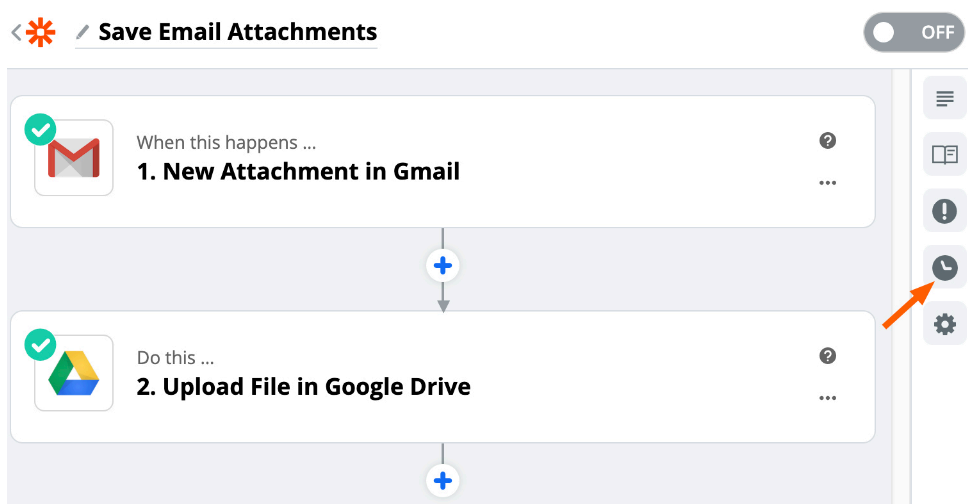
A quick reminder:

Whenever your Zap successfully automates something, it's called a Task. Trigger steps don't count as Tasks, but successful action steps do. A single Zap can generate one or more Tasks, depending on how many action steps it has.

How to find and navigate your Task history

There are three main ways to access your Task history:

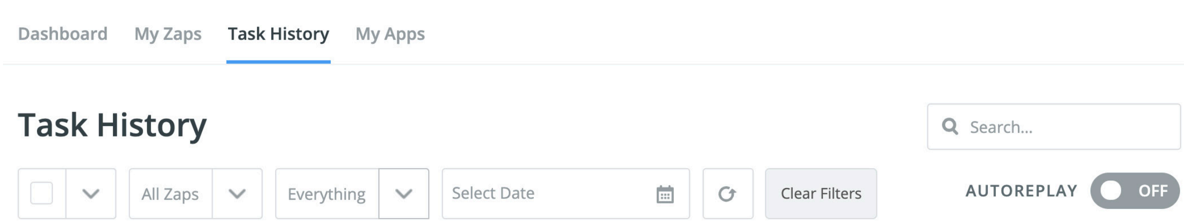
1. **From your dashboard**. You can review the history of your Tasks for your entire Zapier account by going to the **Task History page** of your dashboard.
2. **From the Zap editor**. You can also get to the *Task History* page by clicking the **Task History** icon in the Zap editor.



3. **From an alert email notification**. If you've received an error email, you can access your Task history from there as well.

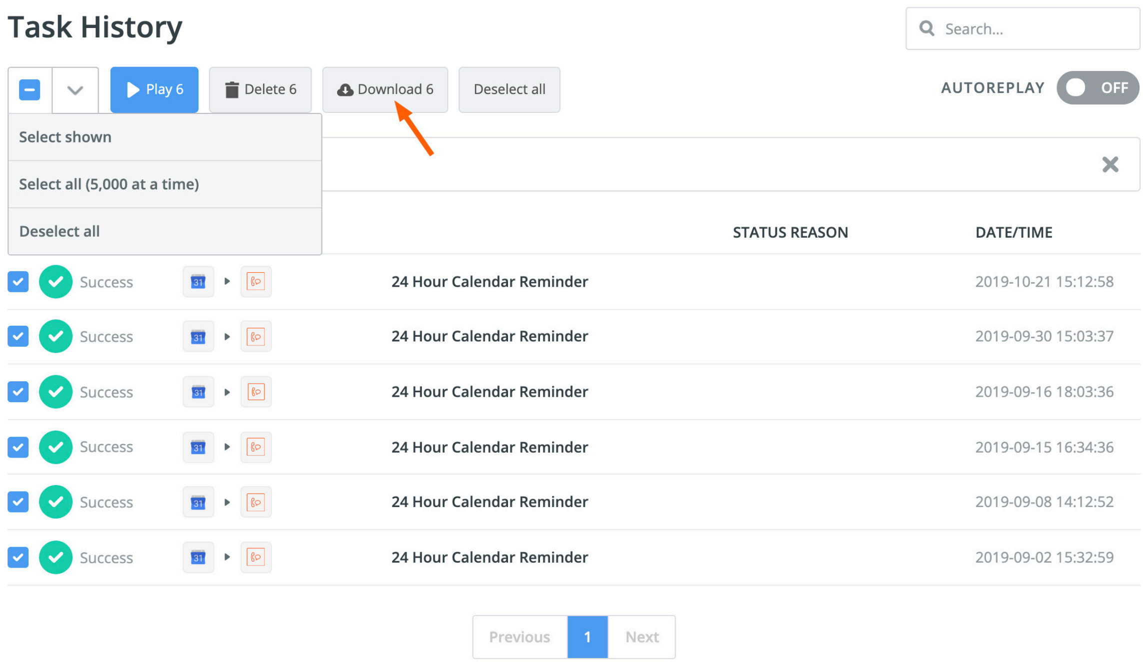
Depending on your email settings, Zapier will send you an automated alert on either individual or repeated errors in your zap. From that email, you can see the error message and also navigate directly to your Task History for more information. You can adjust your notification preferences by going to the **Email Notifications section** of your account settings.

Once you've gotten to your *Task History* page, you can drill down more specifically to only look at Tasks of a certain Zap, certain task statuses, or Tasks that fall under a certain date range:



You can also search all filtered Tasks for specific content. This is especially helpful if you're trying to troubleshoot or figure out why a specific Task didn't work the way you'd expect. Type the term or terms in the search bar on the *Task History* page.

You can also generate a .csv file of your task history and export it to your email address for your records. Click the **checkbox** for an individual Task or choose an option from the **checkbox dropdown menu** to bulk select Tasks. Once you've selected the Task or Tasks you're interested in, click **Download [x]**.



In the dialog box that opens, click **Generate & Email CSV** to send a CSV to your Zapier account's email address. This may take a few minutes.

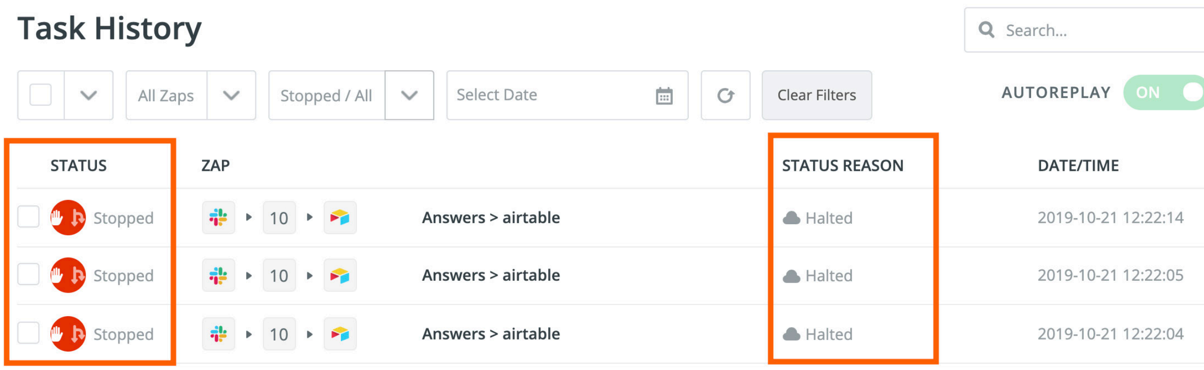
Interpreting your Task History

Your *Task History* page shows you valuable information about what's going on behind the scenes. Zap statuses specifically are able to give you some insight into what's happening in your Zap.

Here are the different Task history statuses and what they mean:

- **Success:** The Zap ran as expected and is now complete.
- **Filtered:** This Zap was stopped because your filter prevented it from continuing.
- **Stopped:** This Zap was stopped because it ran into an error. If a Zap hits too many errors in a row, it will be automatically paused.
- **Waiting:** The Zap is waiting to complete. Zaps that have a Delay step or are scheduled to Autoreplay will have this status.
- **Playing:** The Zap is currently running.
- **Holding:** The Zap is being held for one of a few reasons.

In addition to a *Status*, some Zaps may also show a *Status Reason* in your Task history.

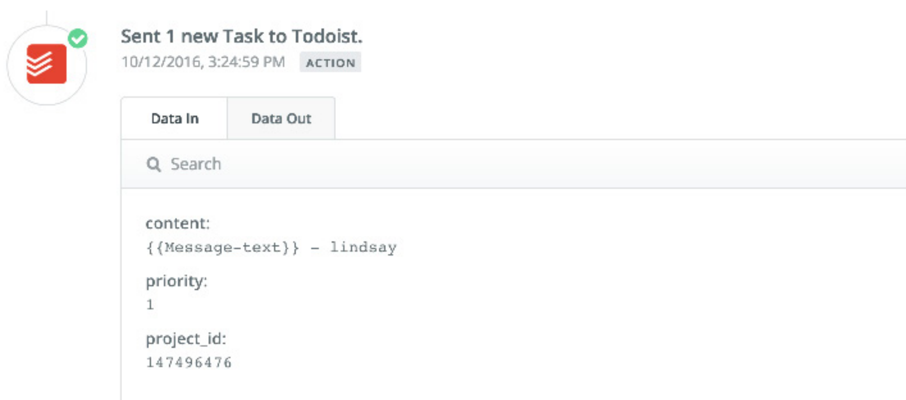


Zaps with a status of *Stopped*, *Waiting*, and *Holding* will include a *Status Reason*, which can give you additional insight into what may be affecting your Zap. You can learn more about **what each reason means** in our help documentation.

You can also click an individual Task History item to see more detail.

This page will show you each step of your Zap. Each step after the first—which is the trigger step—corresponds to a Task. You can see the status of each individual Task here, such as seeing if it ran successfully, if it hit an error, or if it didn't run at all.

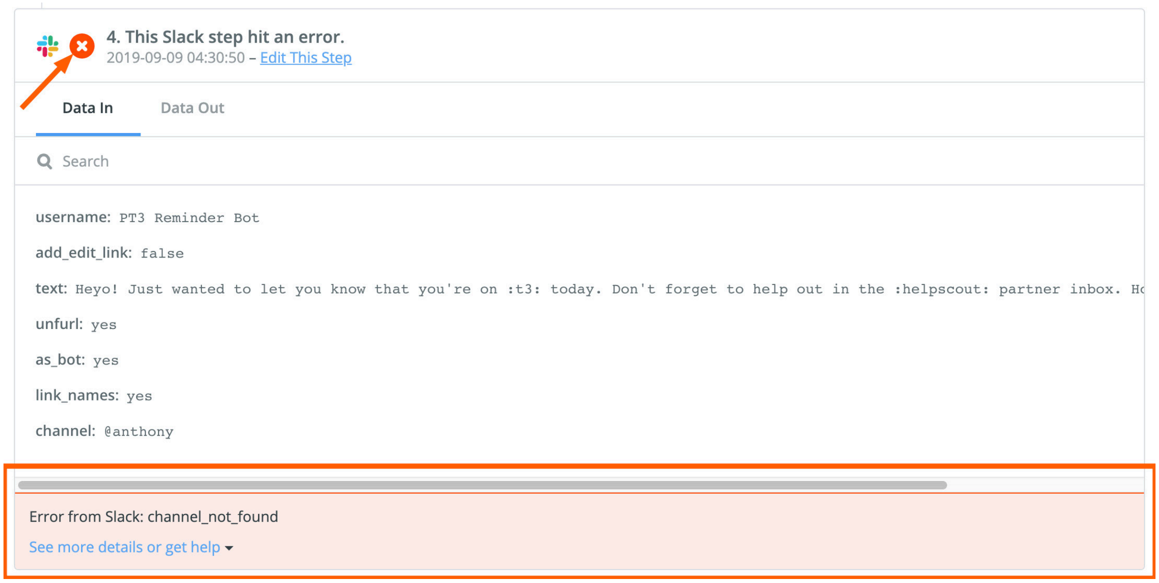
For an even closer look, you can look at the *Data In* and *Data Out* tabs for each step.



- **Data In:** This shows the data that was sent to the connected app for the given step.
- **Data Out:** This shows the data that was received from the connected app for the given step.

You can learn more about **what Data In and Data Out can tell you** from our help documentation.

If the step you're looking at hit an error, you can see more information about that from this page too. The errored step will be marked with an X next to the step name, and a red bar at the bottom will give additional information about the error that caused your step to fail.

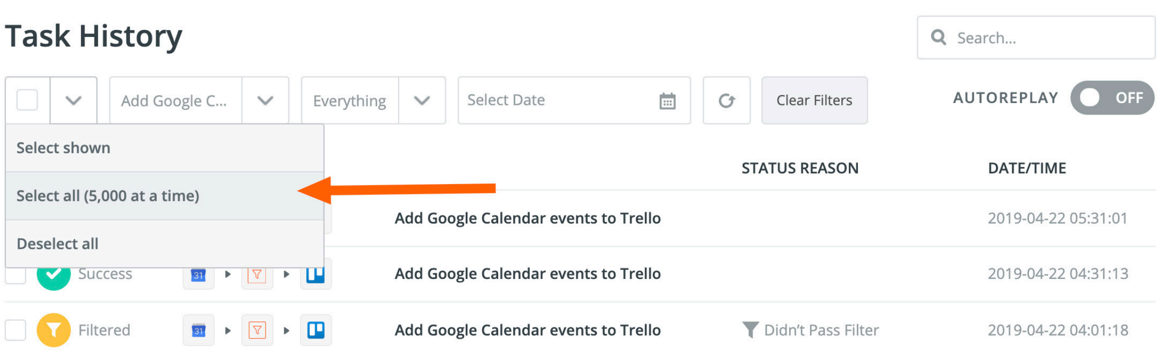


If you click **See more details or get help**, you can then click **Contact Support** to submit a request for help with that particular error.

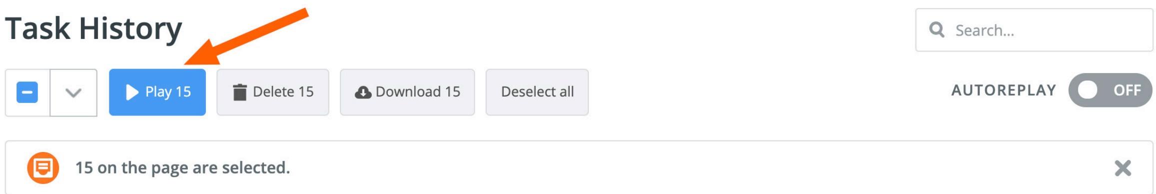
How to replay Tasks

For users on any **paid plan**, unsuccessful Tasks can be manually replayed from the Task History page as well. Here, you can filter tasks by status, Zap, or date, and select tasks to replay individually or in bulk.

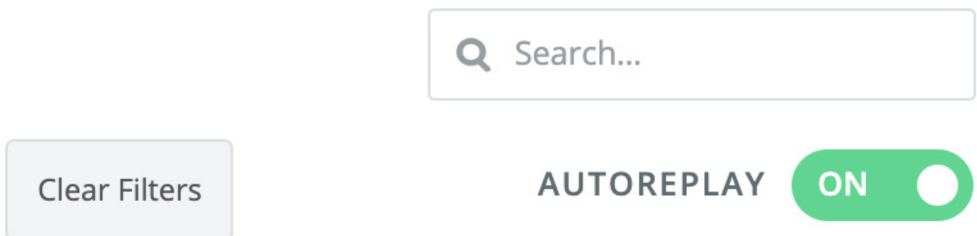
1. **Individual:** Select the checkboxes next to the Tasks you want to replay.
2. **Bulk:** In the upper left, click the **checkbox dropdown menu** and select **Select shown** to select all the tasks on the page, or **Select all (5,000 at a time)** to select up to 5,000 tasks.



Then, in the upper left, click **Play [x]**.



If you're on a Professional plan or higher, you can use *Autoreplay*. If Autoreplay is enabled, Zapier will attempt to retry any tasks that fail due to temporary errors or downtime. Autoreplay will retry the action again immediately, and then a few more times if there is still an issue. Click the **toggle next to Autoreplay** to turn this feature on.



You can learn more about **how Autoreplay works** in our help documentation.

Beyond Task history: Where to get more help

Zapier is a pretty complex machine: We work with over 1,500 different apps and our workflows are infinitely customizable. In a perfect world, your Zaps would run flawlessly without exception. However, sometimes things don't work quite the way you'd expect. When those errors crop up, Task History can help you get things running smoothly again.

Sometimes, though, you may need help getting to the bottom of any errors faster. For more troubleshooting advice for your Zaps, see our **help documentation** or feel free to **reach out to us**. We're here to help!

This instructional course was crafted for you with love by Zapier.

zapier