

# Automate Workflows



101

# Agenda

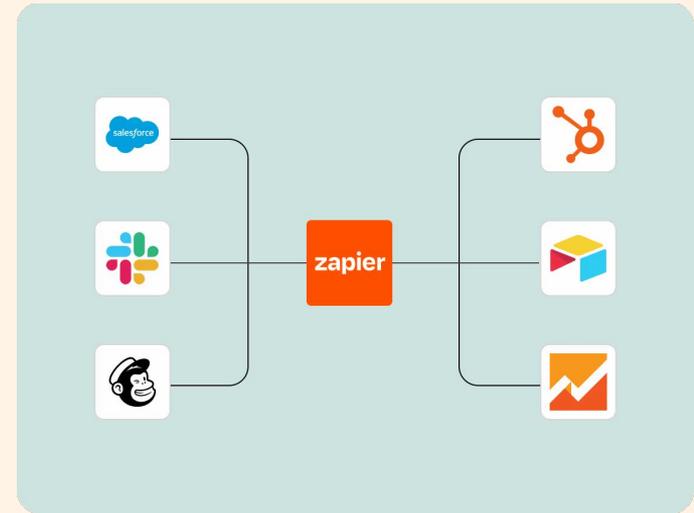
1. Intro
2. Automation
3. Zapier
4. Zaps
5. Demo
6. Resources
7. Q&A

**“Don’t be a Bot,  
Build the Bot.”**

**- Zapier**

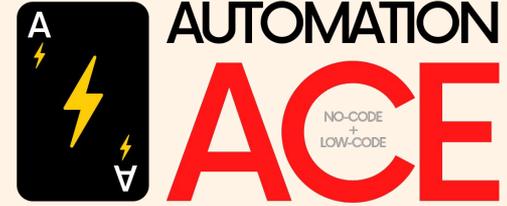
# Questions

1. Are **familiar** with Automation?
2. Have **heard** of Zapier?
3. Have **used** Zapier?



# Troy Tessalone

## Automation Ace



**Role:** Workflow Automation Consultant

**Math:** “Millions of Minutes”

### Certified Zapier Expert

Top 10 out of only 100

- **Apps:** 750+
- **Clients:** 700+
- **Automations:** 10,000+

### Zapier Community

#1 Contributor

- **Topics:** 140+
- **Replies:** 25,000+
- **Solved:** 3,000+

### Upwork Talent

Top 1%

- **Jobs:** 650+
- **Hours:** 2,000+

PREMIER EXPERT

 **Automation Ace**

📍 Los Angeles, CA, United States of America

★ 5.0 (116)

My profile

Topics	140
Replies	25181
Solved	3046

<b>647</b>	<b>2,003</b>
Total jobs	Total hours

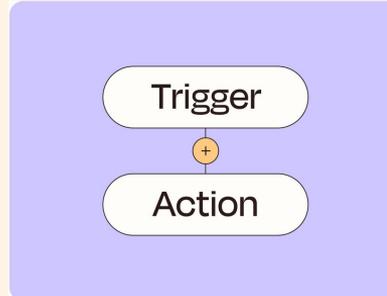
# Automation: Overview

## Automation:

Transfer & Transform Data  
between Apps using  
Trigger & Action steps

**Linear Logic:**  
IF THIS, DO THAT

**Programmable Productivity**



## Examples of business process automation



### Sales processes

Automatically move leads through the sales funnel with less friction.



### Marketing processes

Set up triggers to automatically follow up on successful CTAs.



### Scheduling processes

Automatically assign tasks and update schedules across teams.



### HR processes

Process, store, and sort job applicants then schedule interviews automatically.



### Customer support processes

Automatically answer basic customer support queries and assign agents.

# Automation: Advantages

1. Timesaver (Less is More)
2. Speed (Act ASAP)
3. Availability (24/7)
4. Accuracy (Eliminate Errors)
5. Visibility (Track & Trace)
6. Optimization (Improvements)
7. Scalability (Go & Grow)
8. ROI (Measure)
9. Revenue (Make Money)
10. Assurance (Stress Less)

## Benefits of automating business processes



Self-sufficiency



Transparency



Efficiency



Accuracy



Predictability



Consistency



Replicability



# Automation: Triggers

## Types

- Instant
  - Push data via Webhooks
- Scheduled
  - Poll/Pull data via APIs



## Options

1. App Integrations
    - a. e.g. New Record, Updated Record, etc.
  2. Email (Parsing)
  3. Forms
  4. Files (CSV)
  5. Manual
  6. Prompts (AI)
  7. RSS Feeds
  8. Schedules
    - a. e.g. Every day at 10 AM
- + more!

# Automation: Actions

## Core CRUD

1. **Create Record** (POST)
2. **Read Record** (GET)
3. **Update Record** (PUT/PATCH)
4. **Delete Record** (DELETE)

## Handlers / Helpers

1. Filter / Paths
2. Formatter / Tools
3. Delay / Wait
4. Iterate / Loop
5. Code / Scripts



CREATE



READ



UPDATE



DELETE

[Zapier.com](https://zapier.com)

Founded in 2011

Users: 2.3M+

Integrate & Automate

Zap Apps: 7,300+

No-Code = No Developer

AI Features

**Productivity Platform**

makes you happier :)

## Tames the Tech

- Authentication
- Permissions
- Requests & Responses
- Errors
- Logging
- + more

 zapier

# Zaps

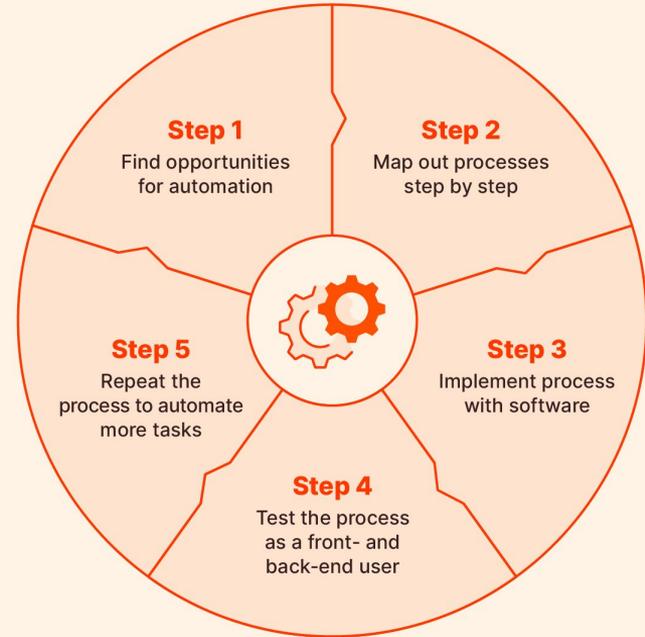
## 5D Process

- |             |                   |
|-------------|-------------------|
| 1. Discover | Research          |
| 2. Define   | Requirements      |
| 3. Design   | Outline the Steps |
| 4. Develop  | Config & Test     |
| 5. Deploy   | Go Live!          |

## Zap Steps

1. **Trigger:** [APP] - [EVENT]
2. **Action:** [APP] - [EVENT]
3. **Action:** ...

## How to set up business process automation



# Zap App: Novi AMS



- **Triggers & Actions + Help**

- <https://zapier.com/apps/novi-ams/integrations#triggers-and-actions>
- <https://zapier.com/apps/novi-ams/help>
- <https://help.noviams.com/en/articles/5436290-advanced-zapier-integration>

### Supported triggers and actions

[What does this mean?](#)

Triggers Actions Triggers & Actions

<b>Member Created</b> Triggers when a member is created.	<b>Member Activity Created</b> Triggers when a member activity is created.
Trigger <input type="radio"/> Instant Try It →	Trigger <input type="radio"/> Instant Try It →
<b>Order Created</b> Triggers when an order is created (with line item support).	<b>Event Registration Created</b> Triggers when a Event Registration is created (with line item support).
Trigger <input type="radio"/> Instant Try It →	Trigger <input type="radio"/> Instant Try It →
<b>Member Updated</b> Triggers when a member is updated.	<b>Event Registration Updated</b> Triggers when a Event Registration is updated (with line item support).
Trigger <input type="radio"/> Instant Try It →	Trigger <input type="radio"/> Instant Try It →

### Supported triggers and actions

[What does this mean?](#)

Triggers Actions Triggers & Actions

<b>Creates Member Activity</b> Creates member activity.	<b>Updates Member</b> Updates a member.
Action <input checked="" type="radio"/> Write	Action <input checked="" type="radio"/> Write
<b>Find Member</b> Find a member by unique Id, name, parent name, or email address.	<b>Find Event Registration</b> Finds an Event Registration based on unique Id or full name. Optionally by event.
Action <input checked="" type="radio"/> Search	Action <input checked="" type="radio"/> Search
<b>Find Member</b> Find a member by unique Id, name, parent name, or email address. Optionally, create one if none are found.	
Action <input checked="" type="radio"/> Search or write	

# Zap App: GrowthZone AMS



- **Triggers & Actions + Help**

- <https://zapier.com/apps/growthzone-ams/integrations#triggers-and-actions>
- <https://zapier.com/apps/growthzone-ams/help>
- <https://helpdesk.growthzone.com/kb/article/2377-zapier-integration-overview/>
- <https://helpdesk.growthzone.com/kb/article/3174-setting-up-zapier/>

## Supported triggers and actions

[What does this mean?](#)

Triggers

Actions

**Triggers & Actions**



### New Event Registrant

Triggers when a new registrant is added to the event.

Trigger

Scheduled

Try It →



### Find an Event

Search for an event by its Id.

Action

Search



### Membership Recently Created or Updated

Triggers when a new membership recently created or updated.

Trigger

Scheduled

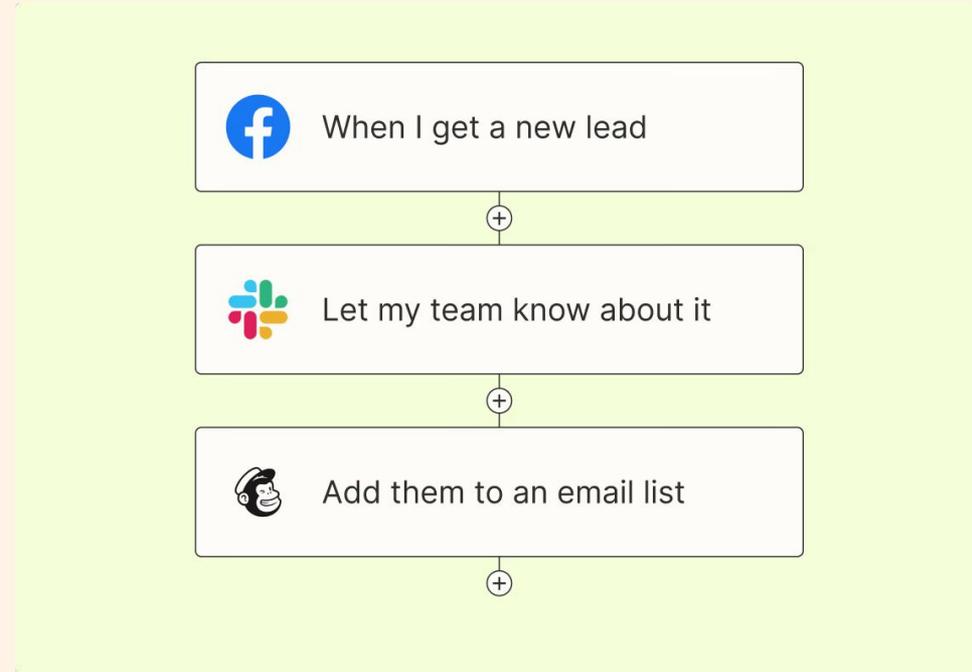
Try It →

# DEMO: Automation in Action

## Zap

- |             |                 |
|-------------|-----------------|
| 1. Config   | Set Up Steps    |
| 2. Test     | Check & Confirm |
| 3. Publish  | Go Live         |
| 4. Activity | Zap Runs        |
| 5. Results  | Data Flow       |

**Steps:** Jotform > GSheets > Slack



# Zapier Products



## Zapier AI

- AI Product Features
  - [zapier.com/ai](https://zapier.com/ai)



## Zapier Zaps

- Automated Workflows
  - [zapier.com/workflows](https://zapier.com/workflows)



## Zapier Tables

- Native Databases
  - [zapier.com/tables](https://zapier.com/tables)



## Zapier Interfaces

- Pages, Forms, Apps
  - [zapier.com/interfaces](https://zapier.com/interfaces)



## Zapier Canvas

- Diagram Workflows
  - [zapier.com/canvas](https://zapier.com/canvas)



## Zapier Chatbots

- AI Chatbots
  - [zapier.com/ai/chatbot](https://zapier.com/ai/chatbot)



## Zapier Central

- AI Bots for Automating
  - [zapier.com/central](https://zapier.com/central)

# Zapier Resources

## 1. Zap Apps

- Zap Apps: 7,300+
  - i. [zapier.com/apps](https://zapier.com/apps)

## 2. Blog

- Tips & Tricks
  - i. <https://zapier.com/blog>

## 3. Help

- Help Center
  - i. [help.zapier.com](https://help.zapier.com)

## 4. Experts

- Hire Help
  - i. [experts.zapier.com](https://experts.zapier.com)

## 5. Community

- Ask for Help
  - i. [community.zapier.com](https://community.zapier.com)

## 6. Learn

- Learn about Zapier
  - i. [learn.zapier.com](https://learn.zapier.com)

## 7. Guides

- Educational Resources
  - i. [zapier.com/resources/guides](https://zapier.com/resources/guides)

## 8. Events

- In-Person, On-Demand, Online
  - i. [zapier.com/resources/events](https://zapier.com/resources/events)

## 9. YouTube

- How To Videos
  - i. [youtube.com/@Zapier](https://youtube.com/@Zapier)

## 10. Plans & Pricing

- Plans, Pricing, Features
  - i. [zapier.com/app/pricing](https://zapier.com/app/pricing)



# Now & Next: AI

## ChatGPT by OpenAI

- Automation can use AI in steps
- AI can use Automations

### ChatGPT

- <https://zapier.com/apps/chatgpt/integrations#triggers-and-actions>
- <https://zapier.com/apps/chatgpt/help>

### OpenAI

- <https://zapier.com/apps/openai/integrations#triggers-and-actions>
- <https://zapier.com/apps/openai/help>

**Zapier + AI =  
even more possibilities.**



**—zapier**

# Info

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**Zapier Expert:** [zapier.com/experts/automation-ace](https://zapier.com/experts/automation-ace)



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