

Zap creation

Examples: How to create ZAP

Example 1 - Trigger from vtenext with action in Zapier

in this example we send an email when a Lead is created in vtenext:

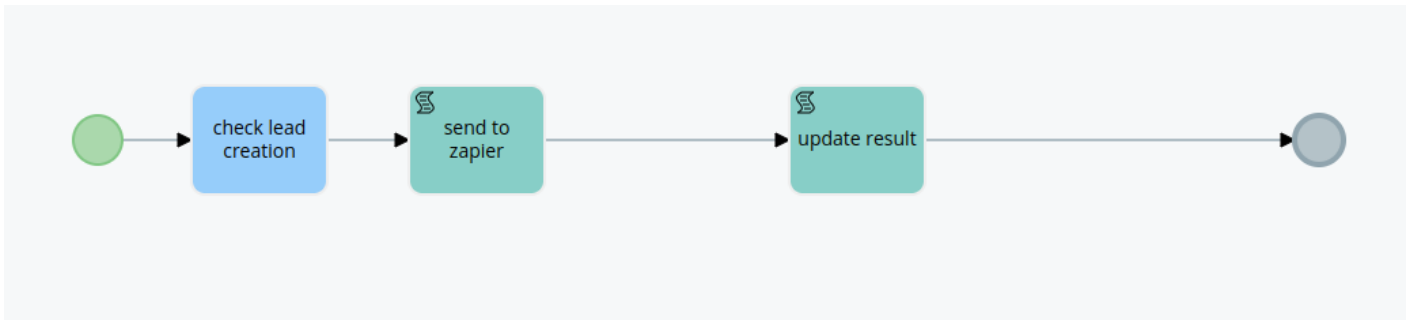
1. Go to <https://zapier.com/app/dashboard>
2. Click on **Create**
3. Trigger: vtenext, event = new lead, account = use a valid account
4. Test it, you should get a Lead, click on **Continue with selected record**
5. Add an action, for example **Email by Zapier -> Send Outbound Email**
6. In this action, configure the fields:
 - To: email address which will receive the email
 - Subject: Lead Created + variables from the email
 - Body: Text of the email with variables

The screenshot displays the Zapier interface. On the left, a sidebar shows a 'Learn the basics' tooltip. The main workspace shows a Zap configuration with two steps: '1. New Lead in Vtenext2 (1.0.0)' and '2. Send Outbound Email in Email by Zapier'. The right panel shows the configuration for the 'Send Outbound Email' action. The 'To' field is set to 'daniele.ferro@vtenext.com'. The 'Subject' field is 'Lead creato (1.Firstname: No data 1.Lastname: sdfg)'. The 'Body' field contains the text 'E' stato creato un lead: nome 1.Firstname: No data cognome: 1.Lastname: sdfg telefono: 1.Phone: No data'. The 'Attachment' field is empty. The 'From Name' field is empty. A 'Continue' button is at the bottom right.

Click on **Continue** and check if you received the email. Click then on **PUBLISH** and verify that the Zap is active.

Now, to set off the trigger from vtenext a process containing the call to Zapier must be created.

In the simplest case, the process can have this flow:



And one of the actions should be of type "Call External Webservice", using the webservice that was automatically created when the Zap was activated. The action should be configured as follows:

Azione: Chiama Web service esterno

Salva Annulla

Titolo azione: zapier lead

Web service: Send to Zapier - Leads

Indirizzo: > Seleziona Opzione...

Autenticazione:

Parametri:

Corpo grezzo: > Seleziona Opzione...

Campi restituiti: attempt, attempt, request_id, id, id, status, Seleziona Opzione...

In the **Raw body** the string to use is

```
$sdk:vte_json_record($1-crmid)
```

where \$1-crmid is the record handled by the process, that we want to send to Zapier

or

```
$sdk:vte_json_field_string($1-crmid, firstname, lastname, phone, ...)
```

To send only some fields. You can choose the ones that interest you the most.

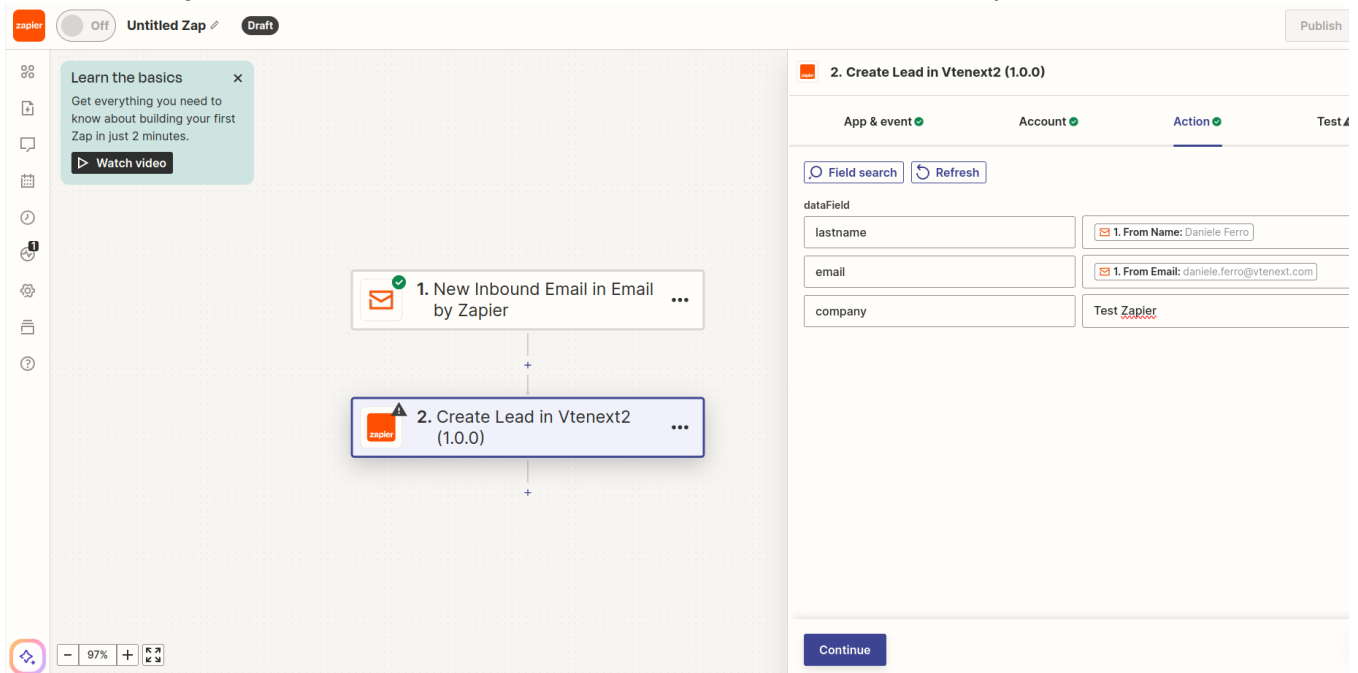
Once the process is active, when the action is executed, Zapier will receive the record and on it the action configured in the Zap will be executed.

NOTE: If the zap is deactivated and recreated, the process must be modified to use the new webservice.

Example 2 - Trigger from Zapier and action in vtenext

In this example, we will try to create a lead in vtenext when an email is sent to a Zapier address:

1. Go to <https://zapier.com/app/dashboard>
2. Click on **Create**
3. Trigger: **Email by Zapier** -> **New Inbound Email**
4. Configure a prefix for the mailbox, for example: testvte.trkbqw@zapiermail.com
5. Send an email to that address and verify that Zapier receives it
6. Create a new action: **Vtenext** -> **Create Lead**
7. Use the proper account and configure the fields to send to vtenext, remembering to map all mandatory fields (otherwise the Lead cannot be created), for example:



8. Make a test to verify the proper creation of the lead.

Finally, click on **PUBLISH**.

At this point, by sending emails to that configured Zapier address, leads are created in vtenext.

These are just a few examples of what the integration with Zapier can do. You can try and come up with all the triggers you want! Just think that, using Zapier paths, it is possible to create or update records by searching directly in the attributes of incoming emails. But it's just an example that helps you understand the power of the tool.

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