zapier
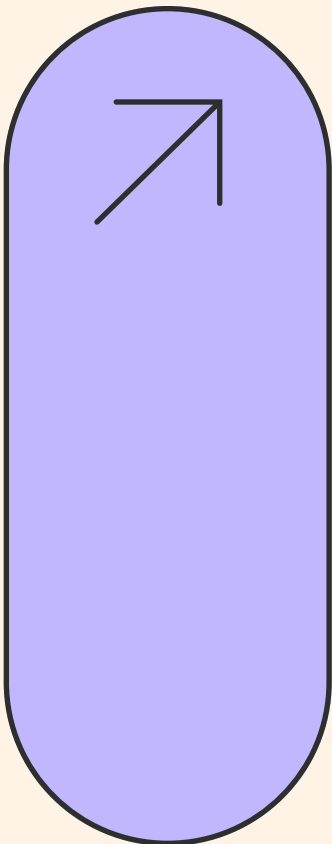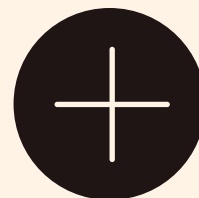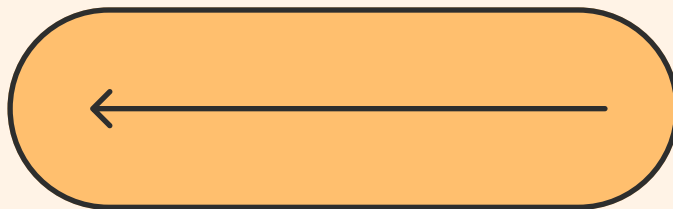
What should I *automate*

Find work you can easily automate, and map out your first automated workflow (aka Zap).

Plan your first Zap

① List some repetitive tasks in your day. The more specific, the better.

....	....	....
....	....	....

② Now use a **WHEN / THEN** framework to map out an automation for one of your tasks.

→ **WHEN** is the trigger: it kicks off your automation.

→ **THEN** is the action: it's what you want your automation to do.

> For example: **When** a new lead fills out my form, **then** add the lead to my mailing list.

When this happens ....

Then do this ....

A Zap can only have one trigger, but it can have multiple actions. If you want, add more below.

And this ....   **And** this ....

③ Ask yourself these questions as you go:

→ What's the problem you want to solve?

→ Which apps will you use?

→ What's your desired result? (Use when/then logic)

→ Where in the apps do you expect data to appear?

Add filters

You might only want certain information to pass through your Zap. Filters make this happen.

(4) Filter information in your Zap by adding an **IF** to the framework.

→ **WHEN** is the trigger: it kicks off your automation.

→ **IF** is the condition: it's what needs to be true in order for the Zap to continue.

→ **THEN** is the action: it's what you want your automation to do.

For example:

When *a new lead fills out my form,* **if** *their email address does not end in @zapier.com,* **then** *add the lead to my mailing list.*

When this happens ....

If this is true ....

Then do this ....

Available filter conditions for your Zaps:

→ Text (contains, does not contain, starts with, ends with, etc.)

→ Number (greater than, less than)

→ Date/time (after, before, matching)

→ Boolean (true/false)

→ Generic (exists/does not exist)

Create multiple paths

Paths allow multiple outcomes to happen, depending on the information received.

⑤ Use multiple **IF** statements to create different paths.

→ **WHEN** is the trigger: it kicks off your automation.

→ **IF** for **PATH A** is the condition: it's what needs to be true in order for **PATH A** to continue.

→ **IF** for **PATH B** is the condition: it's what needs to be true in order for **PATH B** to continue.

→ **THEN** is the action: it's what you want your automation to do. Each path will have its own action (or actions).

> *For example:*
>
> **When** *a new lead fills out my form,*
>
> **PATH A:**   **PATH B:**
>
> *if their email address DOES NOT end in*   *if their email address DOES end in*
> *@zapier.com,* **then** *add the lead to my*   *@zapier.com,* **then** *add the lead to my*
> *"warm leads" mailing list.*   *"Zapier team" mailing list.*

When this happens ....

PATH A: **PATH B:**

If ....   If ....

Then ....   Then ....

To learn more about how automation can improve your processes, check out our How it works page, or visit the Zapier Community to ask questions and browse discussions.

Automation inspiration

The Zapier blog is a great place to learn about how people across roles and industries automate their work with Zapier. Take a look at the examples below, and then explore!

5 things to automate today →

When to automate a task →

6 ways to automate Google Sheets →

How SMBs can run ad campaigns like the Fortune 500 →

Tame your email with automation →

Or take our quiz for a personalized recommendation on what to automate!