Zapier: Connect Apps Without Code

Zapier connects apps so that one event in one app can start work in another. This guide takes you from your first automation to a safe, monitored workflow. Every example uses fake data and a test account. You do not need the class video.

Part 1. The words you need

Word	Meaning	Example
Zap	One automation: a trigger plus actions	"New form answer adds a row"
Trigger	The event that starts a Zap	New response in a form
Action	A step that does something	Create a spreadsheet row
Step	Any trigger, action, filter or path in the Zap	The third step is a filter
Filter	A rule that lets the run continue only if it is true	Rating is 3 or more
Path	A branch that runs different actions for different conditions	Path A for Yes, Path B for No
Field mapping	Choosing which earlier value fills a later field	Name from the form goes to the Name column
Test step	A run that uses a real sample item so you can check fields	Test trigger finds your fake response
Connection	The saved login for an app	A test Google account
Task	One completed action in a run, which counts against your plan limit	One row added is one task

Part 2. The screen and the parts of a Zap

1. **Trigger card:** the app and event that starts the Zap.
2. **Action cards:** each step after the trigger, in order.
3. **Test button:** runs one step with sample data.
4. **Run history:** shows every past run, the steps it reached and any error.
5. **On/off switch:** a Zap runs only when it is turned on.

Part 3. Build your first Zap: form to sheet

1. Create a test form with two fields: a fake name and a rating from 1 to 5.
2. Submit one fake response.
3. Create a Zap. Choose the form app as the trigger, then "New response".
4. Test the trigger. Zapier should show your fake response. If not, submit another and test again.
5. Add an action: a spreadsheet app, "Create spreadsheet row" in a test sheet.
6. Map the name to the Name column and the rating to the Rating column.
7. Test the action. Check that one new row appears with the right values.
8. Turn the Zap on only after both tests pass.

You should see: one fake response creates one row, and each value sits in the right column.

Part 4. Add a filter and a path

4.1 A filter

1. Add a Filter step after the trigger. Continue only if rating is 3 or more.
2. Submit one response with rating 5 and one with rating 1.
3. **Pass when:** only rating 5 reaches the sheet. Rating 1 stops at the filter, and the run history says so.

4.2 Paths

1. Add a Paths step. Path A: rating 4 or 5 adds a row to "Strong". Path B: anything else adds a row to "Review".
2. **Pass when:** each fake response reaches exactly one path.

> **Always test both sides.** A filter or path that is only tested with passing data can hide a silent failure on the other side.

Part 5. Add a message safely

1. Add an action that sends a message to a test channel or to your own test address.
2. Add an approval step before any message that leaves your organisation. In practice, use a Zap that drafts the message and a person who sends it.
3. **Pass when:** the test channel receives one message per matching response, and the message contains no personal details.

Part 6. Duplicates and safe re-runs

Risk	Control
The same response triggers twice	Store each response ID in a sheet and check it before adding a row
A run fails halfway	Use the run history to see where it stopped; re-run only the failed step
A bad value reaches a sheet	Add a filter that stops empty or malformed values before the action

Part 7. Common errors and fixes

Symptom	Likely cause	What to do
Trigger test finds nothing	No sample item exists yet	Create a fake item in the source app and test again
Action fails on a field	A required field is empty	Map a value to every required field, or give a default
Zap runs but nothing appears	A filter stopped the run	Open run history and read which step stopped it
Connection expired	The app login was revoked	Reconnect the test account and test again
Duplicate rows	No duplicate check	Add the response-ID check from Part 6
Tasks used up quickly	Many runs on large data	Filter earlier, and check your plan's task limit

Part 8. Test plan

Test	Input	Pass when
Happy path	Rating 5 fake response	One row, Strong path
Low rating	Rating 1 fake response	One row, Review path
Empty field	No name	Stopped by the filter, with a clear run history entry
Duplicate	Same response twice	One row only
Connection off	Disconnect the sheet app for one run	Run fails visibly; nothing is half-written

Part 9. Going live: checklist

Item	Done
Test account and fake data only	[ ]
Trigger and every action tested with a sample item	[ ]
Filter and paths tested on both sides	[ ]
Duplicate check in place	[ ]
No external message without an approval step	[ ]
Run history reviewed after the first ten runs	[ ]
Plan task limit checked on zapier.com	[ ]

Part 10. Ask for help the right way

Give the tool these five things: the goal in one line, the apps involved, the step you are on, the exact error text, and the one fix you want. Ask for one change at a time.

Part 11. Quiz (answers follow)

1. What starts a Zap?
2. What does a filter do?
3. Why test both sides of a path?
4. How do you stop duplicate rows?
5. Why add an approval step before a message?

Answers: 1. The trigger. 2. It lets the run continue only if the condition is true. 3. A path that is tested on one side can hide a silent failure on the other. 4. Store each response ID and check it before adding a row. 5. So a person checks any message that leaves the organisation.

Part 12. Glossary

Term	Plain meaning
Zap	An automation of one trigger and its actions.
Trigger	The event that starts a Zap.
Action	A step that does something.

Filter	A rule that stops a run unless a condition is true.
Path	A branch for different conditions.
Task	One completed action, counted against the plan.

Plans, task limits and app availability change. Check zapier.com's help and pricing pages on the day you build.