

# Zapier Automation: From Beginner to Intermediate

## Course Description

This course will teach you how to automate your work using Zapier, a powerful platform that connects the apps you use every day into automated workflows called Zaps. You will learn the basics of automation, popular Zapier features and built-in tools, as well as Zapier's limitations and workarounds. By the end of this course, you will be able to create your own Zaps to streamline your workflow and save time. The course also provides hands-on experience to help students apply what they have learned to real-world scenarios. The course will provide an overview of AI and its capabilities, followed by a step-by-step guide on how to integrate AI into Zapier workflows. Students will learn how to use AI by Zapier to parse leads, route messages, and parse any text. The course will also cover the limitations of AI by Zapier.

## Audience

This course is designed for anyone who wants to automate their work and streamline their workflow. It is ideal for business professionals, entrepreneurs, freelancers, and anyone who uses multiple apps on a daily basis.

## Pre-requisite Knowledge/Skills

- Basic computer skills
- Familiarity with the apps you want to connect and automate
- Willingness to learn and experiment

## Course Objectives

1. Understand the basics of automation and how it can help you be more efficient
2. Create your first Zap and automate your everyday apps
3. Learn about advanced automation features like multi-step Zaps, logic paths, filters, and delays
4. Use other Zapier tools like Search, Formatter, Schedule, SMS, and Paths
5. Understand Zapier's limitations and find workarounds.
6. Understand the basics of AI and its capabilities
7. Integrate AI by Zapier into their workflows

## Course Outline

The course comprises 32 hours of theory and labs. It's divided into 10 different modules and One Bonus Module.

## Module 1: Welcome to Zapier 101

- Get an overview of what Zapier 101 will cover—and how it'll help you learn to automate.
- How can automation help me?

## Module 2: What is automation?

- Learn the basics of automation: what it is and what it can do for you.
- What is automation?
- How can automation help me?
- What can I automate?

## Module 3: Automating your work

- Learn how Zapier connects the apps you use every day into automated workflows called Zaps—and how to create your first Zap.
- Automating your work
- Automating your everyday apps
- Creating an automated workflow
- Understanding a Zap
- Creating a Zap
- Testing your Zap

## Module 4: Popular Zapier features

- Get familiar with popular Zapier features and built-in tools that can add even more power to your workflows—like logic paths, filter steps, and delays.
- Advanced automation
- Multi-step Zaps
- How to use: Search
- Other Zapier tools
- How to use: Filter
- How to use: Delay
- How to use: Formatter
- How to use: Schedule

- How to use SMS
- How to use: Paths

## Module 5: Zapier's limitations

- Learn about Zapier's limitations and find workarounds.
- Limitations
- Tasks, Zaps, & third-party APIs
- When apps are not supported

## Module 6: Inside the Zap Editor

- Inside the Zap Editor
- How to Use: Input Fields
- How to Use: Custom Values
- How to Use: Polling and Instant Triggers
- Sharing Zaps
- Zap History, Revisited

## Module 7: Advanced Zapier Tools

- Advanced Zapier Tools
- What is Formatter?
- Formatter: Remove HTML
- Formatter: Lookup Tables
- Formatter: Line Items
- Formatter: Spreadsheet-Style Formulas
- How to Use: Webhooks
- Zapier Chrome Extension

## Module 8: Zapier Plans

- Zapier Plans
- Zapier for Teams
- Zapier for Companies

## Module 9: Advanced Automation Techniques

- Advanced Automation Techniques
- Code by Zapier
- Python Code in Zaps

## Module 10: Troubleshooting and Best Practices

- Troubleshooting and Best Practices
- Common Zap Errors and How to Fix Them
- Best Practices for Creating Zaps
- Zapier Support

## Bonus Module: Using AI by Zapier for Automation

- Introduction to AI by Zapier and its capabilities for automation
- Using AI by Zapier to parse leads and route messages
- Using AI by Zapier to parse any text with custom fields and filters
- Understanding the limits of AI by Zapier and workarounds
- Hands-on exercises to apply AI by Zapier in real-world scenarios.