Title: Zapier Integrations

Through the 3rd party website Zapier, SPOTIO Admin's are able to set up an integration that can pass data seamlessly between SPOTIO and any other software.. The purpose of this article is to walk you through the different options/methods for setting up a Zapier Integration.

Overview:

- Integrations **save you time** by seamlessly passing data and information between SPOTIO and other softwares, which minimizes the need for duplicate data entry.
- **Keep everything up to date** by setting up an integration that not only creates new leads, but also updates existing leads between SPOTIO and other softwares.
- **Expand reporting and visibility** into all of your leads and activities by having them mirrored in multiple systems.

Best Practices:

- Plan out your integration with as much detail as possible to ensure you are setting it up to pass the specific information you are needing between the 2 platforms.
- Mirror your SPOTIO account customizations to be similar to your other software account customizations so that it is easier to sync corresponding information between the two.
- Don't overthink your integration! SPOTIO and all of the other softwares available on Zapier can be very customizable and can have very extensive/elaborate setups to them. When creating your integration the best mindset to have is "What do I need to sync between the 2." and not "What can I sync between the 2."

Video Tutorial:

This article provides a step by step guide to setting up your Salesforce Integration, but a video tutorial is also available at the following link:

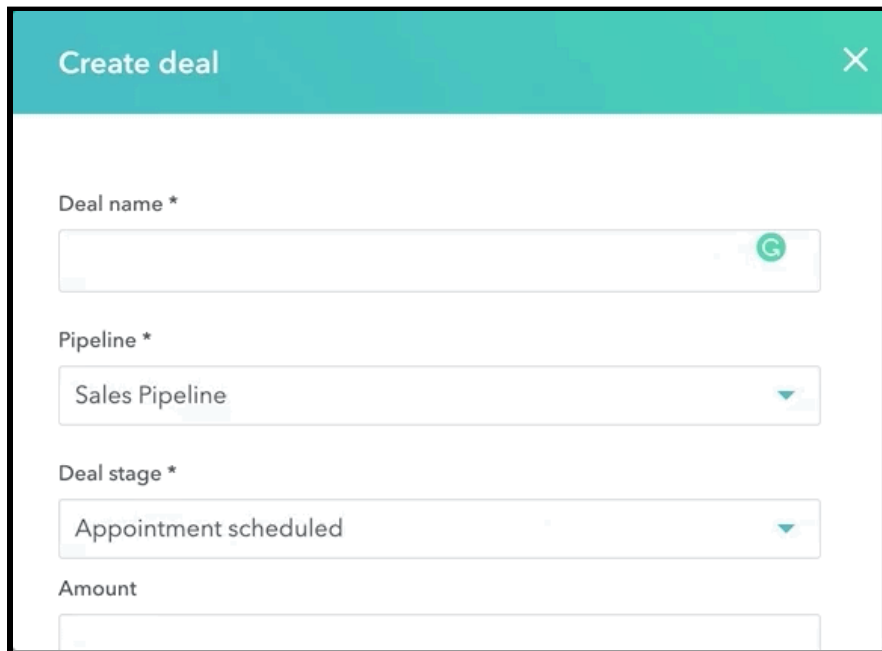https://spotio.wistia.com/medias/zvusp40frl

Preparing your SPOTIO Account for the Integration:

All SPOTIO plans are able to be integrated through Zapier, however there are several important steps you will need to take on the SPOTIO side of things before moving into your Zapier account.y
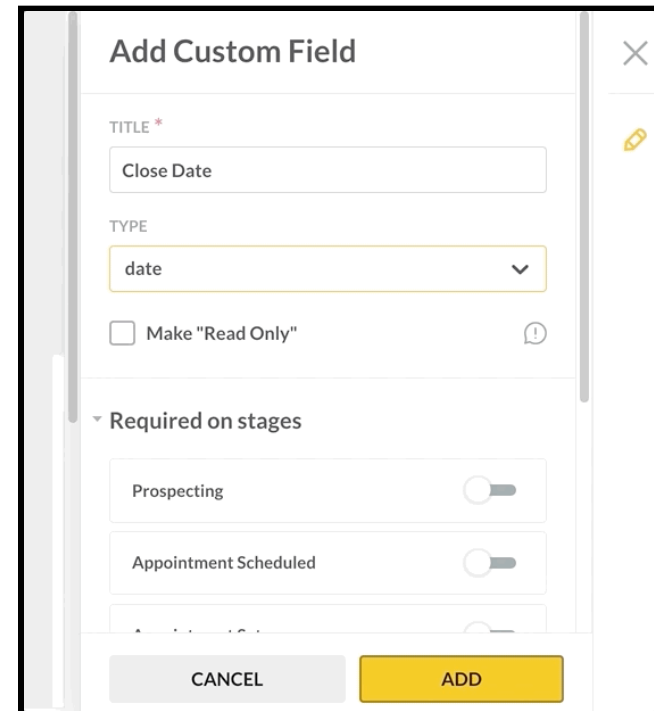
Step 1: Customizing your SPOTIO Account:

Before building your Zap you will need to make sure your SPOTIO account has been customized and set up to be compatible with the other software(s) that you will be integrating with. These customizations will primarily consist of Pipeline Stages, Visit Results, Activities, and Custom Fields. In order for SPOTIO to be able to pass or receive the corresponding information to/from the other software, it will need to have a place to be stored inside your SPOTIO account.

Below is an example of a few customizations being added to a SPOTIO account to reflect an account in HubSpot. Notice how for a "Deal" in HubSpot there are fields for "Close Date" and "Deal Type". Since SPOTIO doesn't have these fields by default these will need to be added as "Custom Fields" inside of the SPOTIO account we are syncing with HubSpot, so that the information can be saved in both systems. In the GIFS below you will see both the Deal fields in the HubSpot account, as well as how you can add the fields into a SPOTIO account:

Example of HubSpot Fields

Example of SPOTIO Fields

It is also important to mirror corresponding stages/statuses from other softwares prior to setting up your Zap.
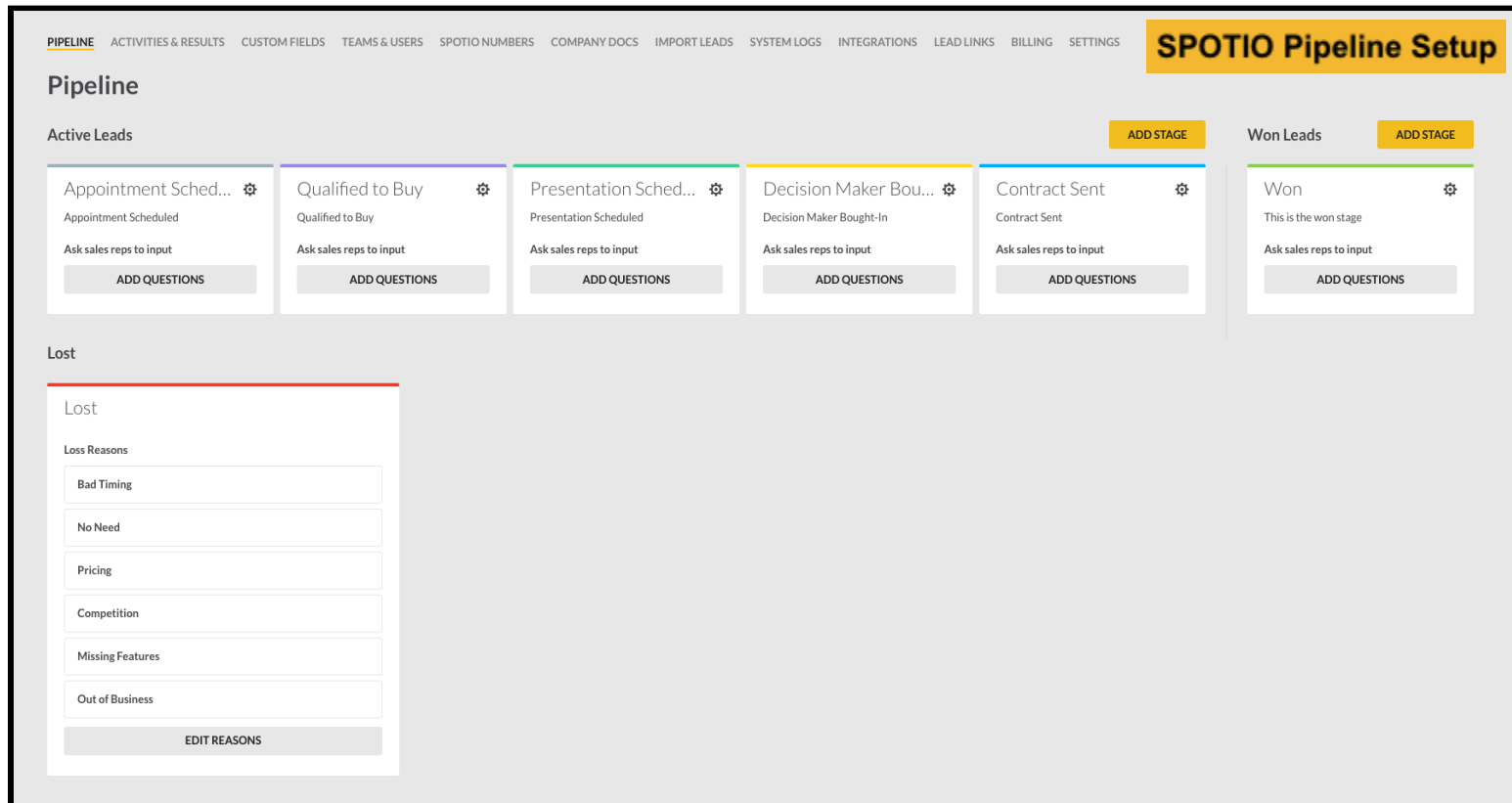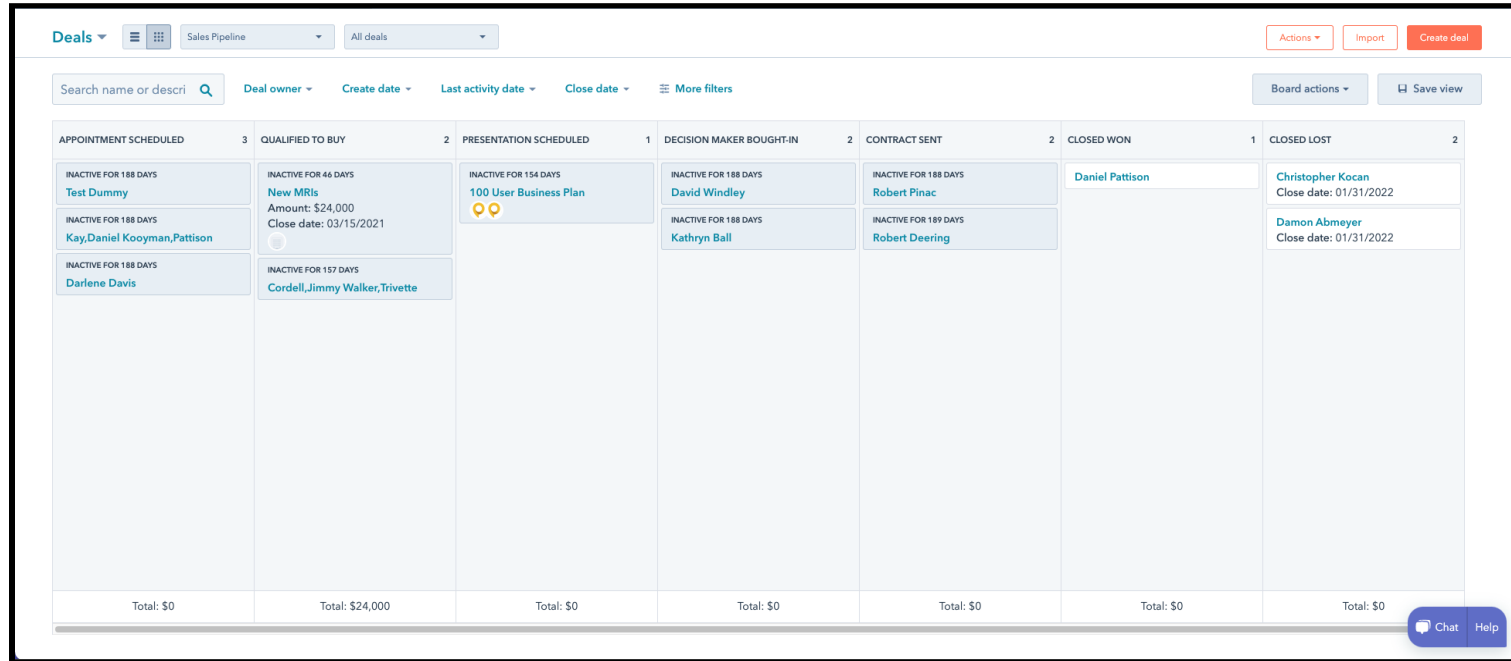
In the screenshots to the right you will see a "Deal" pipeline in HubSpot that has been replicated in a SPOTIO account in the screenshot below it.

Replicating these statuses will allow for the Zapier integration to move leads into the appropriate stage/status during the integration.

Replicating pipelines like this isn't required for the integration to work, but it will make it alot easier to keep things in sync when the terminology is the same between the 2 different softwares.

Instructions on how to setup/customize your SPOTIO Pipeline can be found here:

https://support.spotio.com/hc/en-us/articles/360018829613-Building-Your-Sales-Pipeline-with-Custom-Stages-
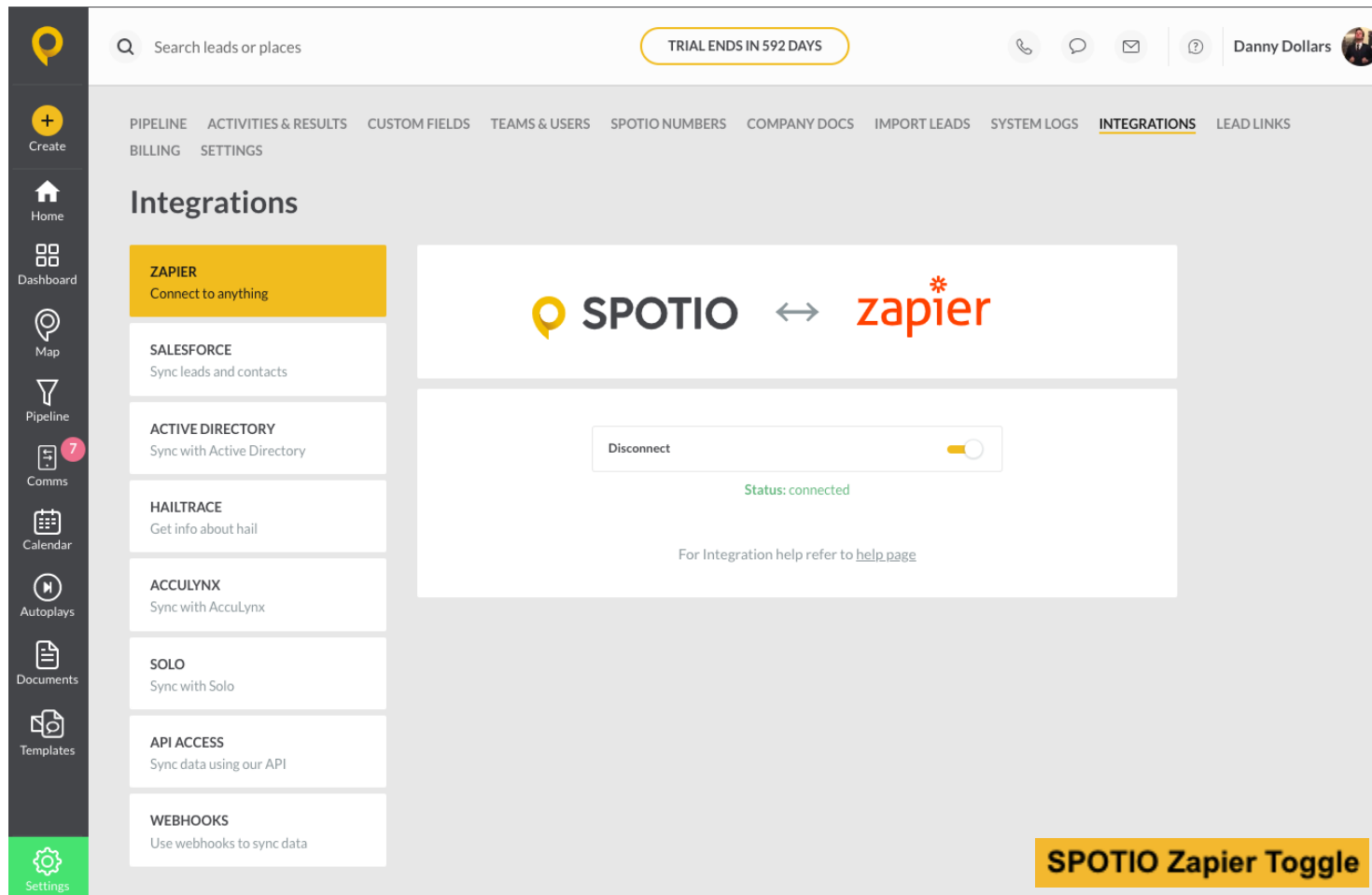
Step 2: Turning on Zapier Sync:

The final required step on the SPOTIO side before setting up your Zapier integration is to turn on your Zapier connection.

This can be done by logging in on the Web version of SPOTIO and navigating to: **Settings > Integrations > Zapier**

From this screen you will want to toggle on the "Connect" switch to ensure your SPOTIO account is set up to pass information into Zapier. The screenshot below shows what the switch should look like if it is turned on successfully:

Setting Up your Zapier Integration:
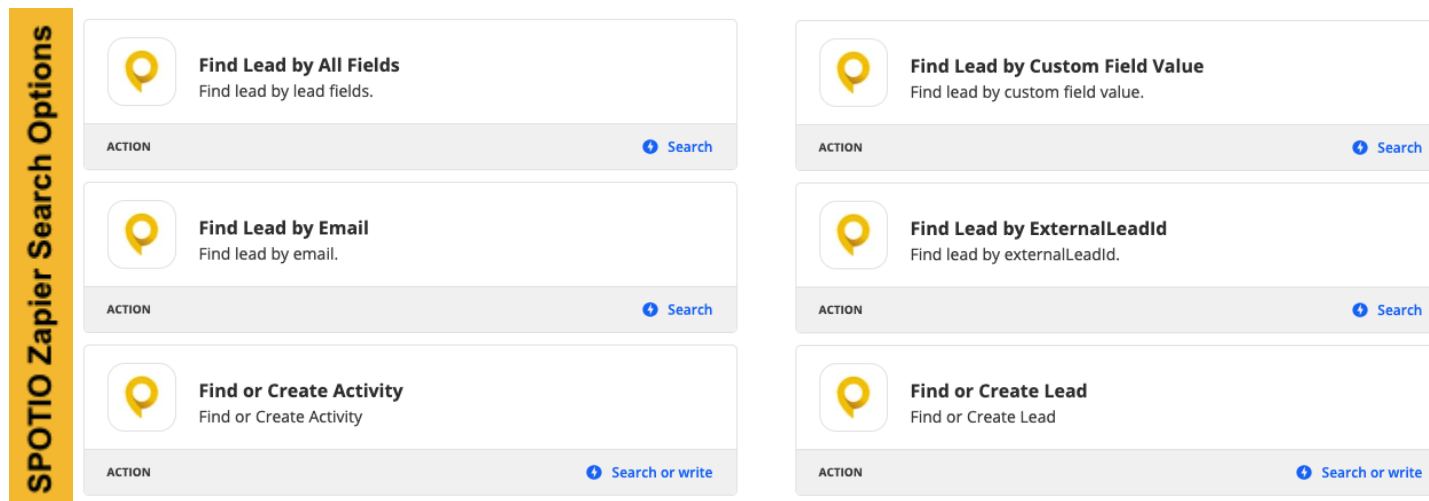
What is Zapier?

Zapier is a 3rd party website that allows users to integrate multiple softwares together with little to no coding/programming experience. Zapier offers various plans that range in price depending on how many integrations you are setting up and how many "tasks" or runs your integration will have. It is recommended when setting up a new Zapier account that you start with a 14 day free trial to ensure that the integration is working as needed before switching to a paid plan long term. Below are links to the Zapier account signup page, as well as SPOTIO's Zapier page:

https://zapier.com/sign-up/   https://zapier.com/apps/spotio2/integrations

What Can I Automate with SPOTIO?

If you click on the link above and go to SPOTIO's Zapier page you will be able to see what Triggers and Actions SPOTIO offers. A **trigger** is the action in SPOTIO you can set to cause an integration to occur, whereas an **action** is what you can have occur in SPOTIO based on a trigger from another software. An example of this would be having a Zap trigger whenever a lead is created in SPOTIO, and as an action having that lead also created in another software that SPOTIO is integrated with. Below are all of SPOTIO's Triggers and Actions that are available through Zapier:

Activity Created
Triggers when activity event (for example Visit, Call, Email) is created.

TRIGGER · Instant

Activity Created or Updated
Triggers when activity event (for example Visit, Call, Email) is created or updated.

TRIGGER · Instant

Activity Updated
Triggers when activity event (for example Visit, Call, Email) is updated.

TRIGGER · Instant

Appointment for Lead Created
Triggers when appointment for lead is created.

TRIGGER · Instant

Document Added to Lead
Triggers when document is added to lead.

TRIGGER · Instant

Lead Created
Triggers when lead is created.

TRIGGER · Instant

Lead Created or Updated
Triggers when lead is created or updated.

TRIGGER · Instant

Lead Stage Changed
Triggers when lead stage changes.

TRIGGER · Instant

Lead Updated
Triggers when lead is updated.

TRIGGER · Instant

Note Created
Triggers when note for lead is created.

TRIGGER · Instant

Create Chat Message
Send a chat message as spotio bot to a specified user.

ACTION · Write

Create Activity
Create activity for leads.

ACTION · Write

Create Activity Note
Create activity note for leads.

ACTION · Write

Create Appointment
Create appointment.

ACTION · Write

Create Image
Create image for lead.

ACTION · Write

Create Lead
Create lead.

ACTION · Write

Enroll Contact
Enroll Contact to Autoplay

ACTION · Write

Update Lead
Update lead.

ACTION · Write

Find Activity by ActivityId
Find activity by activityId.

ACTION · Search

Find Lead
Find lead by address and address unit.

ACTION · Search

Step 1: Selecting the SPOTIO Trigger

To get started building your Zap you will need to click on the "Create Zap" button in the top left corner of your account. This will then take you to the new Zap building tool where you can search for "SPOTIO" to find the SPOTIO Zap trigger options. When you search for "SPOTIO" you might see several different SPOTIO Zap options, so will want to make sure you are selecting the "Beta" version of the SPOTIO Zap to ensure you are on the most up to date version. Below are screenshots of the New Zap creation button and the SPOTIO Beta Zap:

Zapier "Search for App Event" Screen

Zapier "Create Zap" Button
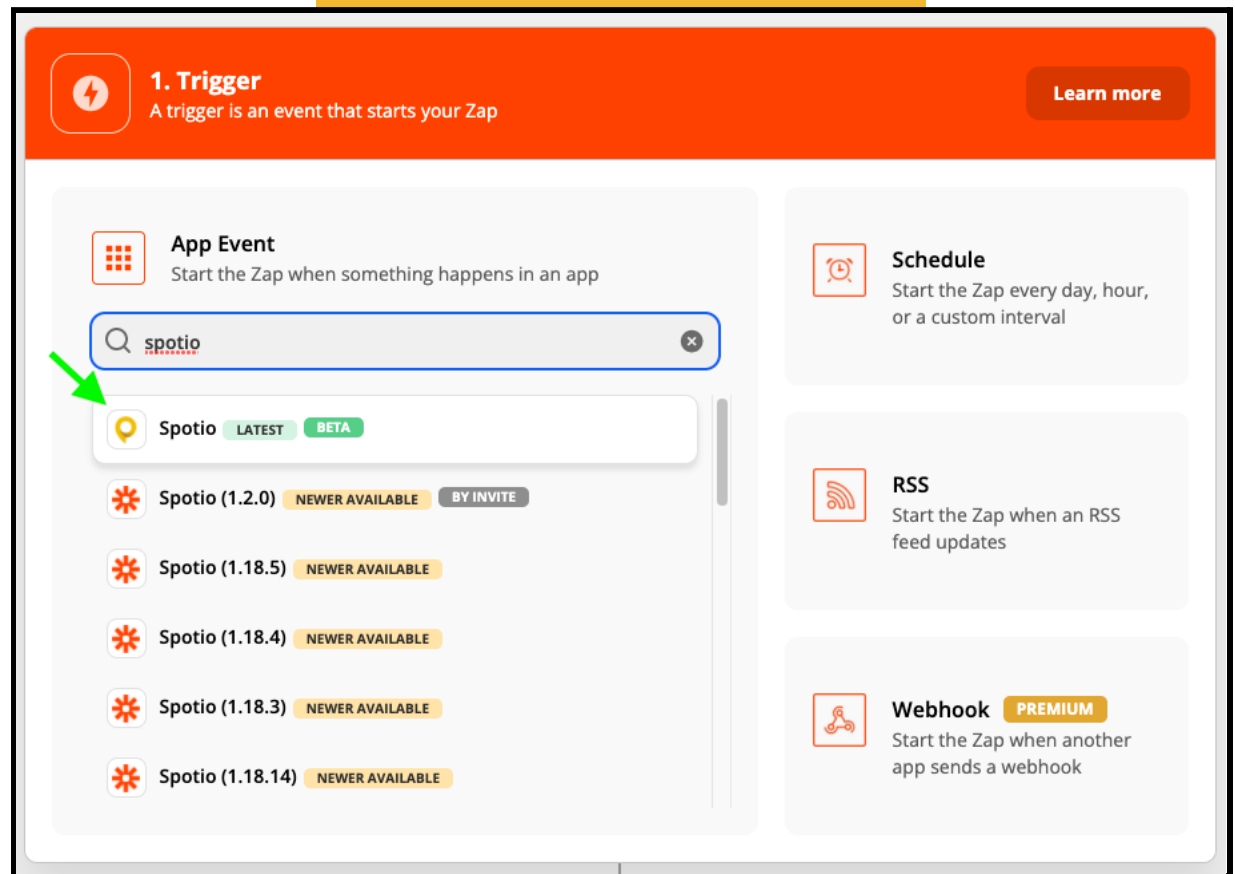
Step 2: Setting up your Trigger

After selecting SPOTIO as your trigger step you will then need to select the "Trigger Event". Each of these Event options is listed above in this article, and is also described below the event name in the dropdown menu.

After you have selected a Trigger event you will then be prompted to select the SPOTIO account you want the integration to be linked with. If you have set up a Zapier integration into your account before you will be able to select it as a dropdown option. If you haven't integrated your account through Zapier before you will want to select the option to "+ Connect a new account" and link your account to Zapier with your Admin login credentials. It is important to link login credentials for an Account Admin in order for your integration to connect successfully.

The screenshot to the right shows where to select a SPOTIO trigger event and the screenshot below shows the account connection screen:

SPOTIO Trigger Event Selection Screen

SPOTIO Account Selection Screen

Step 3: Testing your Trigger

After you have selected your SPOTIO trigger and successfully connected your account Zapier will then prompt you to test the trigger.

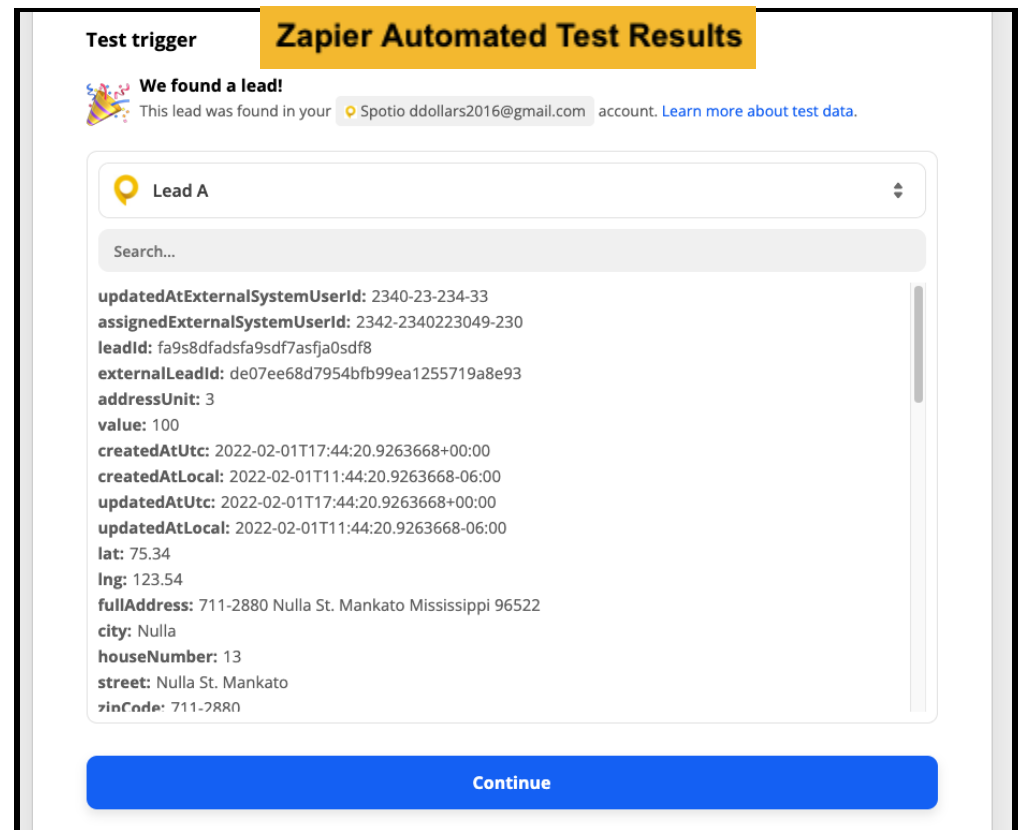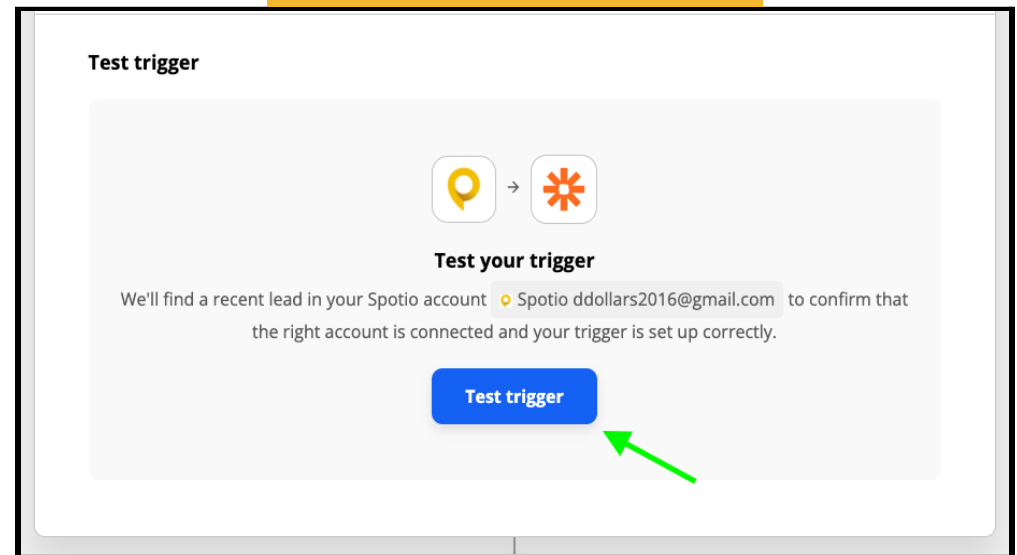When you click the blue button to "Test Trigger" and randomly generated test lead will be sent from your SPOTIO account into Zapier. If the lead is successfully sent you will see the message "We found a lead!" appear.

This message indicates that your trigger is working and Zapier has successfully received information from your SPOTIO account.

If there are any errors or configuration issues with your SPOTIO account you should receive an error message during this step that indicates what needs to be fixed/reconfigured in order for the trigger portion of your Zap to work properly.

In the screenshots to the right you will see the button to test your trigger, as well as an example of a successful test screen.

After running your test you can click on the blue "Continue" button to proceed to the action step of your Zap.

Zapier Automated Trigger Test

Test trigger

Test your trigger

We'll find a recent lead in your Spotio account ⊙ Spotio ddollars2016@gmail.com to confirm that the right account is connected and your trigger is set up correctly.

Test trigger

Test trigger   **Zapier Automated Test Results**

🎉 **We found a lead!**
This lead was found in your ⊙ Spotio ddollars2016@gmail.com account. Learn more about test data.

⊙ **Lead A**   ⇕

Search...

updatedAtExternalSystemUserId: 2340-23-234-33
assignedExternalSystemUserId: 2342-2340223049-230
leadId: fa9s8dfadsfa9sdf7asfja0sdf8
externalLeadId: de07ee68d7954bfb99ea1255719a8e93
addressUnit: 3
value: 100
createdAtUtc: 2022-02-01T17:44:20.9263668+00:00
createdAtLocal: 2022-02-01T11:44:20.9263668-06:00
updatedAtUtc: 2022-02-01T17:44:20.9263668+00:00
updatedAtLocal: 2022-02-01T11:44:20.9263668-06:00
lat: 75.34
lng: 123.54
fullAddress: 711-2880 Nulla St. Mankato Mississippi 96522
city: Nulla
houseNumber: 13
street: Nulla St. Mankato
zipCode: 711-2880

Continue

Step 4: Setting Up a Filter

The next step in setting up your Zap is to select the Action/Actions that you want to occur as a result of the trigger you setup. Typically these actions will involve pushing information out of SPOTIO into another software, but they can also involve intermediary steps such as filters, lookup tables, and other utilities that alter or adjust your SPOTIO data prior to sending it to another software. For the example in this article we will be creating a filter step to only pass leads into HubSpot that are in the Stage "Qualified to Buy".

To add a filter action you can either search for it, or select the filter icon in the action menu.

Once you select the filter option you then need to fill in the 3 different dropdowns with the following information:

Left Dropdown: The information from SPOTIO that you want to filter by (in the example below it is Stage Name)

Middle Dropdown: The logic that the filter will be based on. For this example it is set to be "Exactly Matches"

Right Dropdown: The criteria that the data from the left dropdown will be compared against.

For this example we have manually typed in "Qualified to Buy" which is a Pipeline Stage in our SPOTIO account. When this filter runs it will compare the stage name of the lead in SPOTIO to see if it exactly matches "Qualified to Buy" and if it does then the lead will proceed to the next step of the Zap. If the lead's stage name doesn't exactly match then it will not proceed.
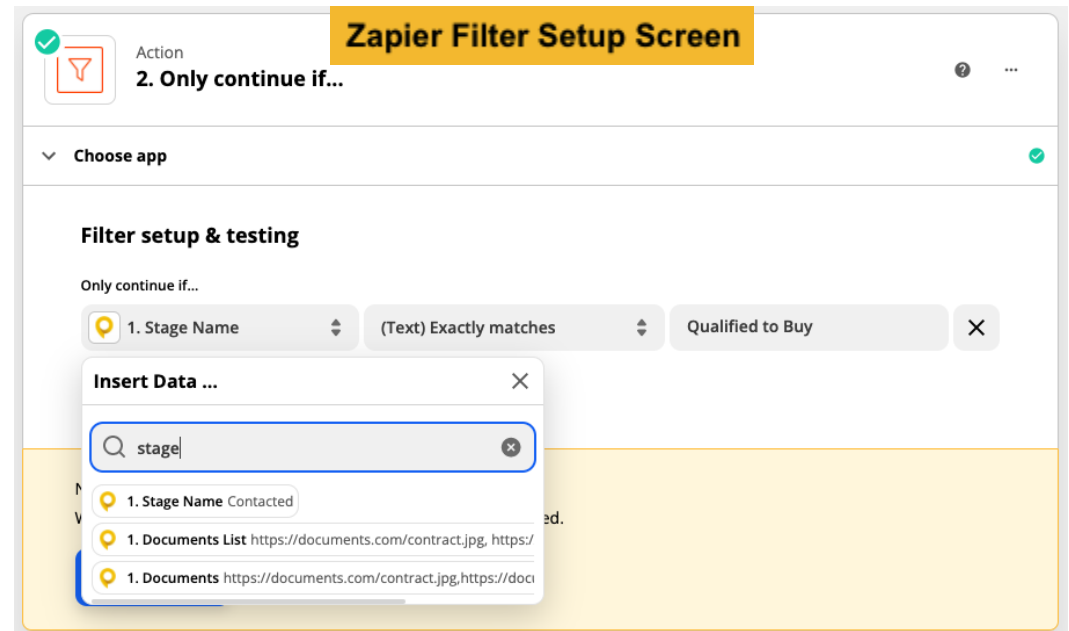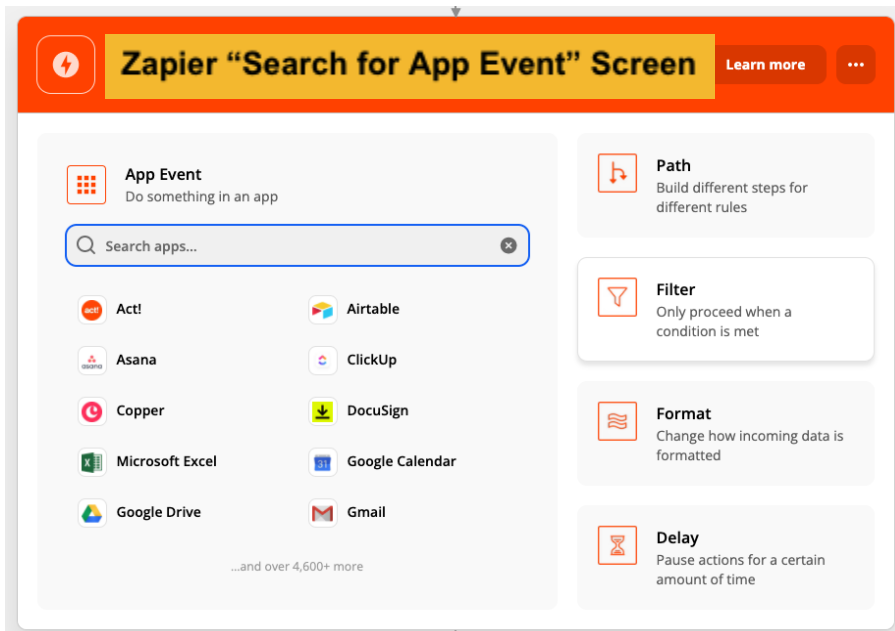
Step 5: Selecting your Action

After adding in any intermediary steps such as filters and utilities the next step will be to setup the action in your Zap. For this example we will be pushing the Lead information from SPOTIO into HubSpot and creating a new Deal.

You can select the software you are wanting to integrate with by searching for it under the App Event box. In the example below you can see that we have searched for and selected HubSpot as our Action.
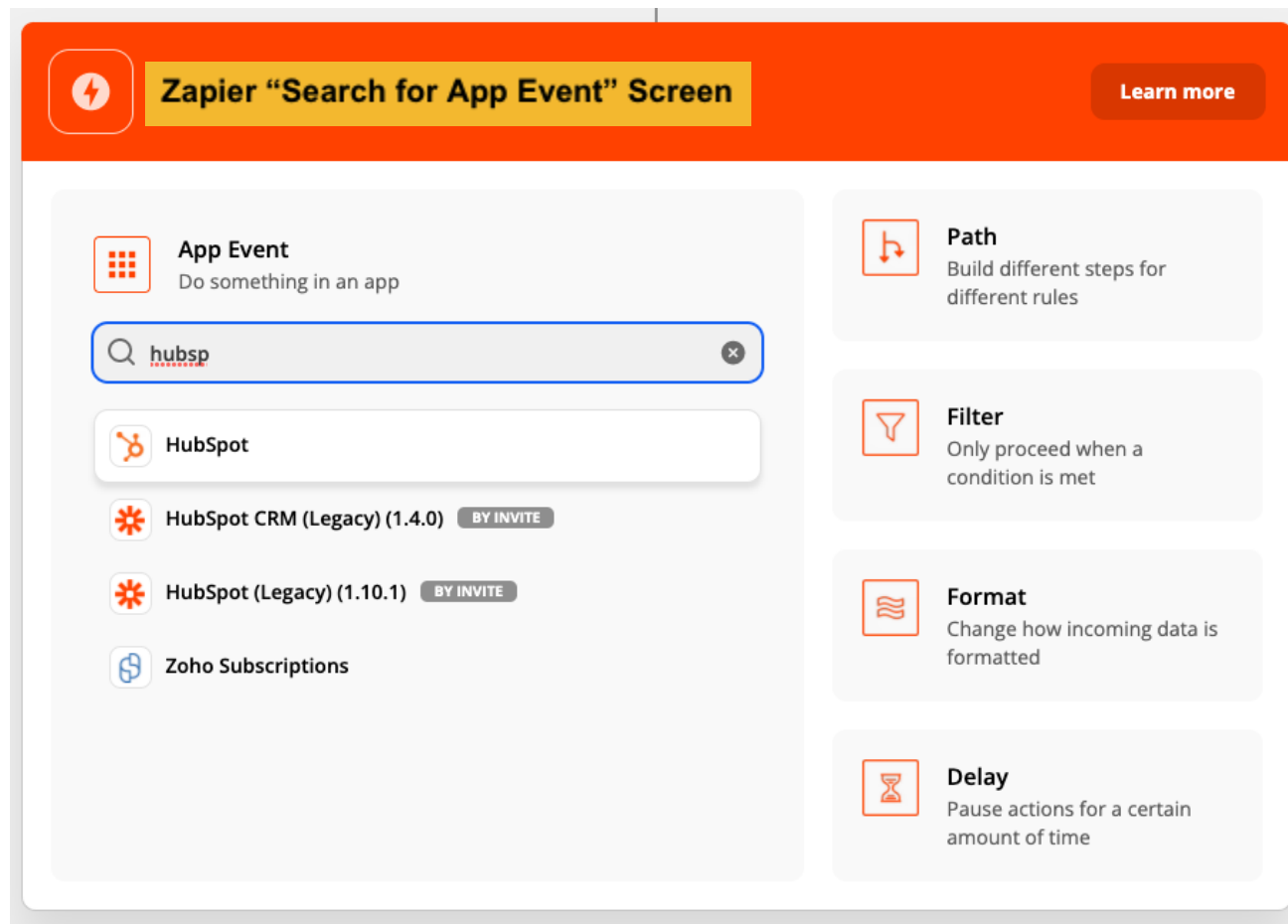
Step 6: Connecting Action Account

After selecting the App you want to use for your action step you will next need to link your account for that corresponding app with your Zapier account. In the screenshots below you can see an example of this with linking HubSpot credentials with Zapier:

HubSpot Account Selection Screen

Action
3. Create Deal in HubSpot

⌄ **Choose app & event**

Choose account

HubSpot account: (required)

Choose an account...

🔒 HubSpot is a secure partner with Zapier. Your credentials are encrypted & can be removed at any time.

To continue, finish required fields

HubSpot Account Confirmation Screen

Connecting **Zapier** to **HubSpot**

Zapier by hubspot.com ⬈

Choose an account

NAME	DETAILS
○ Dano Spotio	danotest.com 20470380

Step 7: Selecting Action Event

After linking to your account for the Action step of your Zap you will then need to select the "Action Event". This is the event you want to have take place in another software based on an action performed in SPOTIO. In the screenshot below you will see some examples of the Action Event being set to "Create Deal" in HubSpot.

Based on the setup of our Zap so far, a new Deal will be created in HubSpot anytime a Lead is moved into the "Qualified to Buy" stage in SPOTIO.
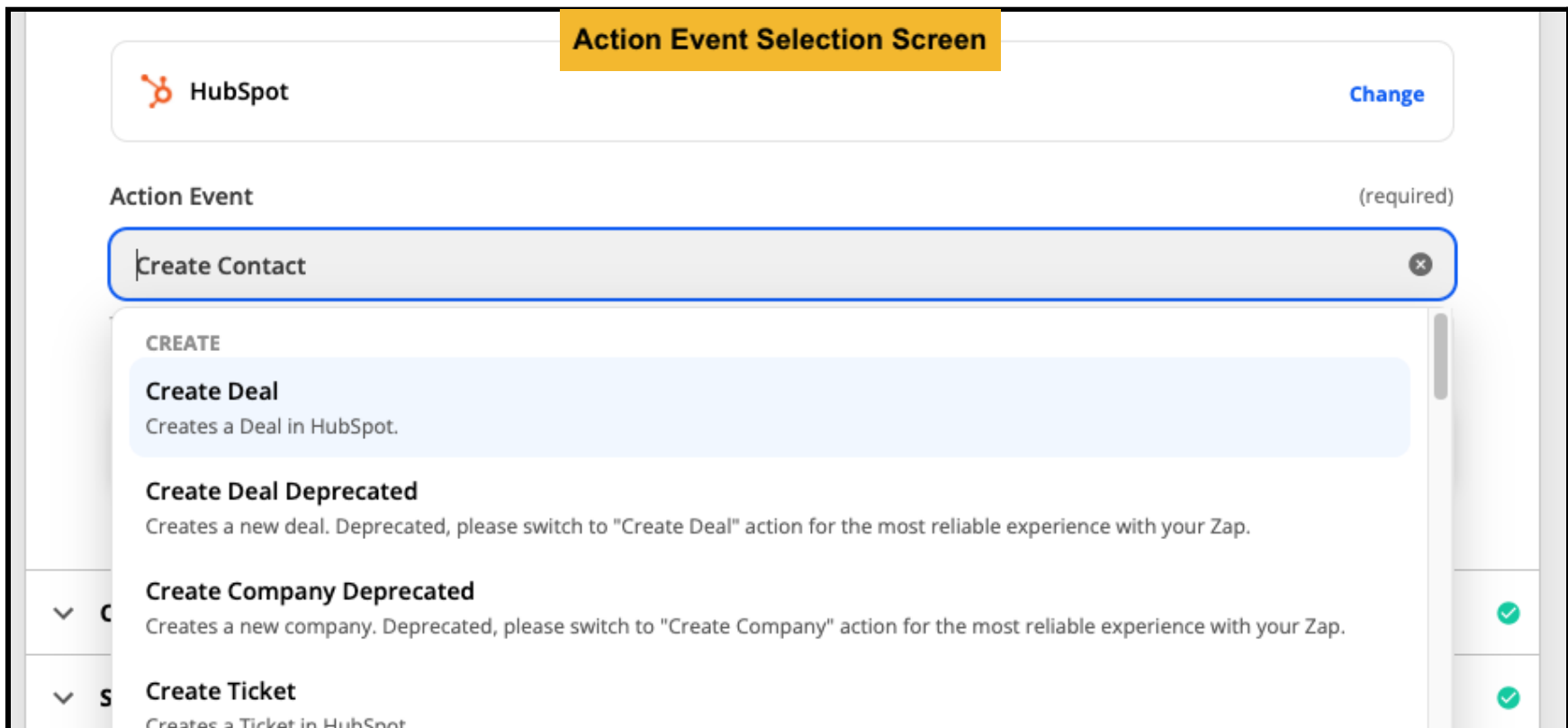
Step 8: Mapping your Fields

The final step in setting up your Zapier integration is to map out your fields of information from SPOTIO into your other software (HubSpot in this example).

You will see several blank text cells appear, each with a name above it that corresponds to a field of information from your other software. When you click into these cells you will then see all available information from SPOTIO that can be mapped to that cell. A good rule of thumb is that any information you see with the yellow SPOTIO logo next to it is information that is coming from your SPOTIO account. All you need to do now is select the corresponding information from SPOTIO that you want to have pushed to this cell in your other software when the integration occurs. It is important to note that some of these fields might have the word (required) written in the right corner above the cell, which indicates that information is required in the other system in order for the action to be completed.

In the screenshots to the right you will see a few examples of SPOTIO fields mapped to HubSpot fields. This includes the SPOTIO "Company" name mapping to the HubSpot Deal "Name" field, as well as the SPOTIO "Value" field mapping to the HubSpot "Deal revenue: Currency" field.

After you have mapped all fields needed for the integration you should be able to click on the blue "Continue" button at the bottom of the screen to complete setup.

Testing your Zapier Integration:

After setting up your Zapier action and triggers it's important to test the integration to ensure data is passing correctly between the 2 systems. Below you will find the steps for running a few basic tests of your Zapier Integration.

Step 1: Turn your Zap On

This might seem like a silly step, however it's important to remember that Zapier will automatically switch off your integration anytime you make changes/edits to it. Before running your tests ensure that all steps of your Zap are showing with Green checkmarks, and that the master toggle is turned on and also showing as green. In the screenshot below you will see an example of each stage of the Zap showing as green and the Zap switch being toggled on.
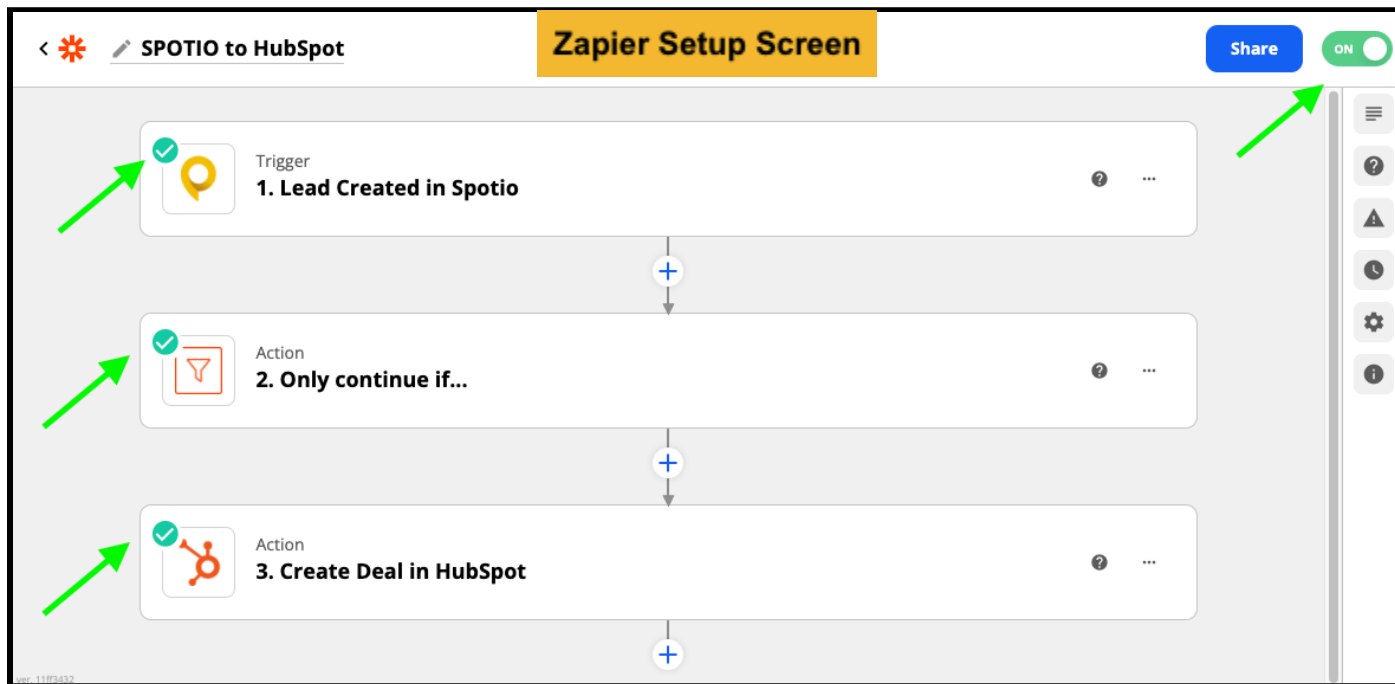
Step 2: Run a Test Action

Based on how you have set up your Zap you will next want to run a test action that causes the Zap to trigger. This will allow you to go back into Zapier and view the log of the Zap firing to ensure that everything is working as expected.

Based on the Zap setup in this article, a new lead created in SPOTIO in the stage "Qualified to Buy" should successfully trigger the Zap and result in a new Deal being created in HubSpot. In the screenshot to the right and below you can see the manual test lead created in SPOTIO, along with the test details added to it. If the Zap is working as expected, creating this lead should result in a new Deal being created in HubSpot with the same information.

It is important to note that when running manual tests you will want to put the word "Test" or "Tester" in the lead to ensure that it doesn't get confused for an actual lead/deal in your SPOTIO account or other systems.

After creating the test lead/action in your SPOTIO account, you will need to go back into Zapier for the final troubleshooting steps.

Newly Added SPOTIO Lead

$5,000 (1 leads)   PIPELINE   LIST   BULK CHANGE (1 RECORD)

	Company	Customer	Stage	Stage updated at	Updated at
	SPOTIO TEST 1	Daniel TEST Pattison TEST	🟢 Qualified to Buy	02/28/2022 10:48 am	02/28/20

📞 💬 ✉️ ❓ **Danny Dollars**

Add Lead   No territory (Global)   ✕

Address   Adjust Manually

Tulsa, OK 74126, USA

Unit   Optional

Company   SPOTIO TEST 1

Qualified to Buy ⌄

Contact

Contact 1

First Name   Daniel TEST

Last Name   Pattison TEST

Email   test@spotio.com

Phone   Optional

New Contact   ⊕

CANCEL   ADD LEAD

Step 3: Review Zapier Log

Once you have sent a test lead to Zapier the next step will be to check your Zap's history log to see if the Zap was successful. The Zap History log is a log found within each Zap you make that shows every time the Zap has been triggered. There are 3 possible outcomes you will typically see in this log:

1) Success - The Zap was Successful
2) Filtered - A filter within the Zap caused it to stop as expected
3) Stopped "Errored" - Something went wrong with the Zap that caused it to not work as expected.

If adding your test lead successfully activated your Zapier trigger, than you will see an instance of the Zap firing for your test lead in this history log with 1 of the 3 statuses above.

Depending on the status you see, you might need to make some additional changes to the Zap.

For example if your test instance shows as "Errored" you will need to click into the error message in order to see the details of what went wrong in the Zap and what needs to be fixed to resolve it.

After you make some adjustments to your Zap for any errors that were identified during testing, you can then run another test of your Zap to confirm that the Zap is now firing successfully.
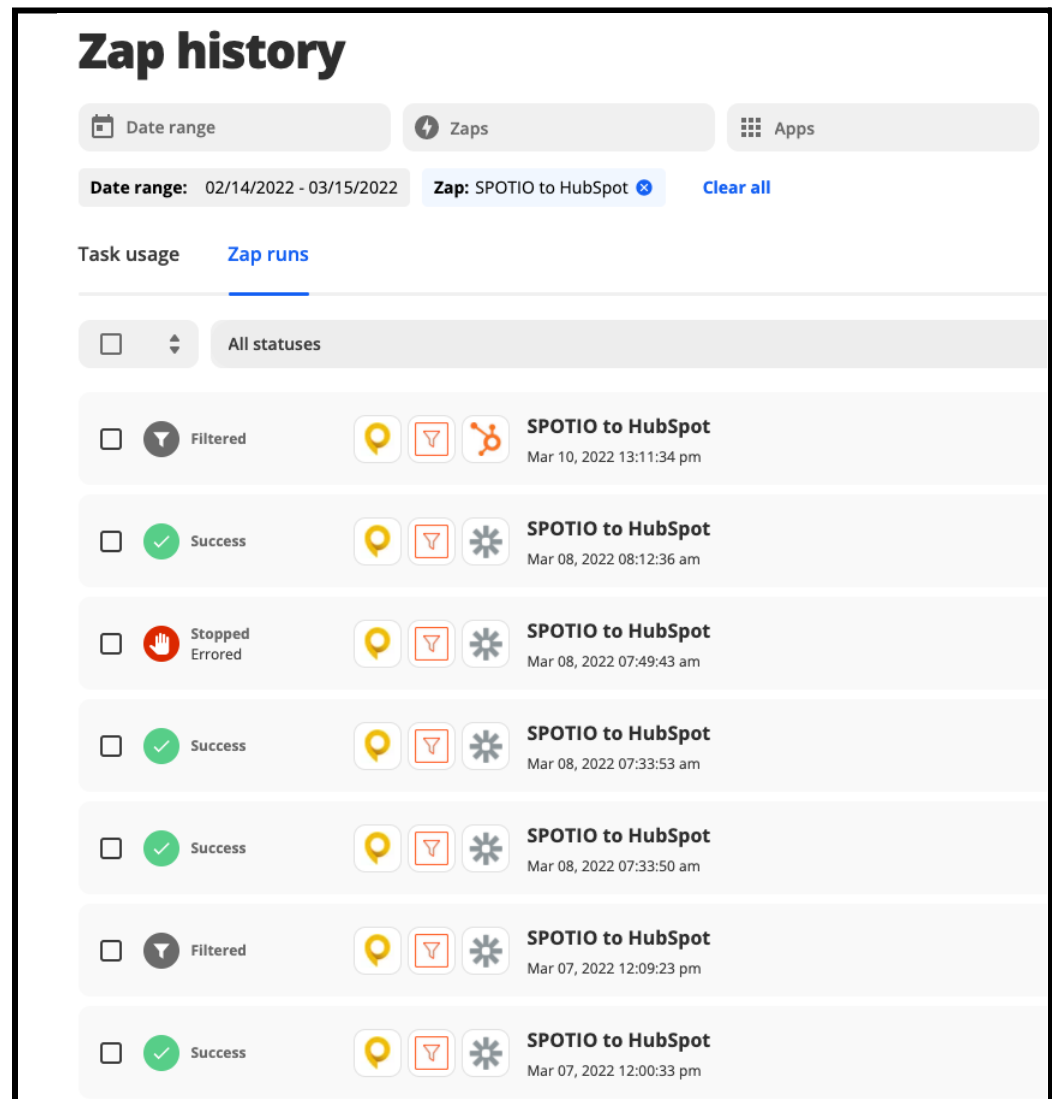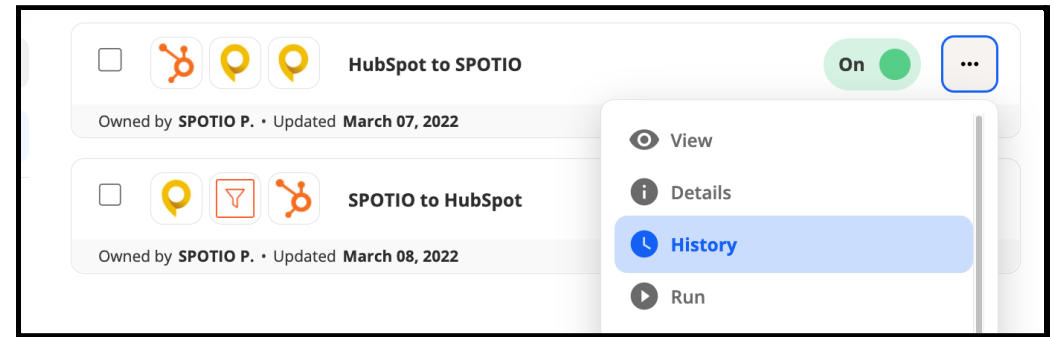
Common Questions/Errors

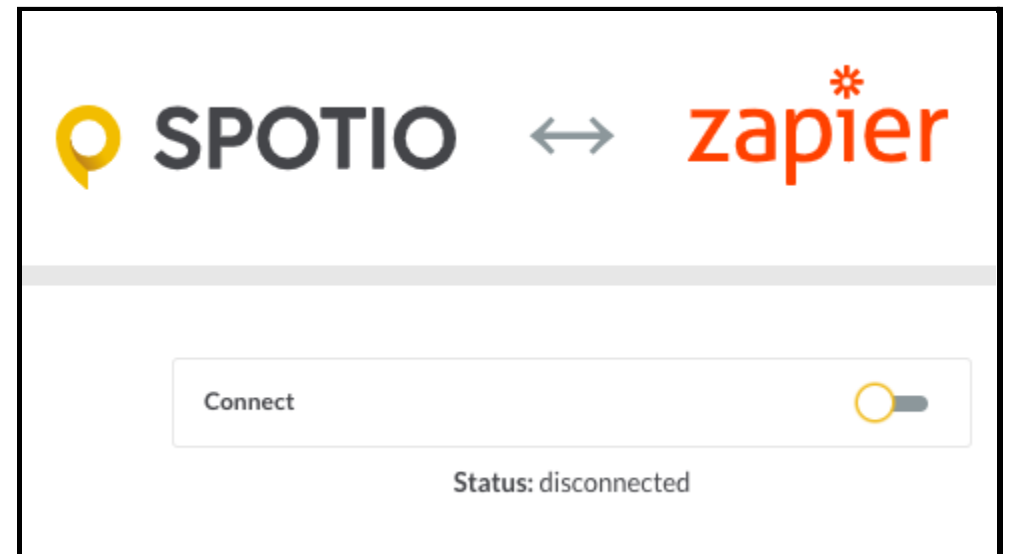We hit an error adding your new account

This error occurs when linking your SPOTIO account to Zapier and is caused by the Zapier switch not being turned on inside of your SPOTIO account.

All you need to do to resolve this issue is navigate to **settings > integrations > zapier** inside of your account and toggle the switch to "On".

App Step hit an error

This error message will display if any app involved in your Zap hits an error that prevents it from properly executing. You can typically find a specific error message in the red section below the step of the Zap that has encountered the error. This message will display an error code, along with specific details regarding the field of information that is causing the error.

In the example below you will see a red error message indicating that "Daniel Pattison" is not a valid HubSpot owner ID.

This lets us know when the Zap tried to send that username into the Owner ID field HubSpot did not accept it and thus caused the error in this step of our integration.

An error like this can be resolved by clicking the "Edit This Step" link in the step of the Zap that the error is occurring, and then going to the field of information reported in the error message and changing it to the correct data format for the field in the other software.

In the example below we would need to change our Zap to send a HubSpot owner ID into the field instead of the username.

Duplicate Leads Being Created

A common issue reported in Zapier integrations involving SPOTIO triggers is the creation of duplicate leads in other softwares. You can detect if this is occurring by 1) seeing duplicate leads in your other software and 2) by seeing the Zap fire multiple times in a very short amount of time.

Typically this issue is caused by the trigger being set to "Lead Created or Updated" or some other trigger option that might occur multiple times in SPOTIO at once, thus causing the Zap to fire multiple times at once.

In the example on the right you can see 2 successful firings of the "SPOTIO to HubSpot " Zap that happened within 3 seconds of each other. This resulted in 2 of the same lead being created inside of HubSpot, and was a direct result of the trigger being set to "Lead Created or Updated".

If your trigger for SPOTIO is set to this and you have a rep that both creates and updates a lead at the same time, it will result in the Zap firing twice and potentially creating a duplicate lead.

All you need to do to resolve this issue is adjust your SPOTIO trigger to fire on an event that occurs in your users workflow only once at a time. This can be something like just triggering for "Lead Created" or "Lead Updated" separately.