Get Happier With _zapier

So, you're ready to start saving time, effort and the headache of manually inputting customer data, sending emails, nurturing leads and so much more by utilizing Jackrabbit's <u>Zapier integration</u>? Let's hop to it!

"How do I start getting happier with Zapier?"

The answer is to follow our checklist below. We've compiled a collection of steps to help you make sure you have everything you need to take the speedy, time-saving functionality that Jackrabbit provides and multiply it with Zapier. So let's dive in, start checking boxes and automate even more of the monotonous parts of your business than ever before.

1. Create Your Zapier Account

- Since Zapier is one of Jackrabbit's integration partners, you will need to create an account on their website before being able to use it with our software.
- Zapier offers tiers to accommodate your business needs. If you're unsure of your needs, start with the free version and adjust once you have a better idea of what you want to accomplish.

2. Link Your Zapier Account With Your Jackrabbit Account

- To link your Zapier account with your Jackrabbit account, you'll need an API key. This can be found via the following path:
  - Gear Icon -> General Settings -> Zapier (left-hand menu).
- Once you have your API Key, return to the Zapier settings and paste the key.

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3. Identify What Information You're Trying To Zap

- Take a moment to assess what you're trying to accomplish with your Zaps. Are you trying to move new client information into Jackrabbit? Maybe you want to set up personalized emails that send out automatically to clients.
- Zapier offers a large library of Zap templates that may already cover what you're trying to do.
- If you find yourself struggling to determine the right match, check out our "What Zap Do You Need?" Quiz.

4. Create And Customize Your Zaps

- Once you've determined the right Zap for you, follow Zapier's intuitive set-up process to create yours.

5. Test Your New Zaps

- You're almost there! Before you set and forget your Zaps, it's a good idea to run them as a test to make sure all information has been input correctly and your Zap is working as intended. This may look different depending on the Zap you're testing but it's important to do either way.
- If the Zap is going to be interacting with customers via email, use your personal work email to try it out before applying it to all of your client contacts.

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6. Train And Share Information With Staff

- Now that your Zaps are set up and working correctly, it's a good idea to share the process with anyone else in your organization that may need to create new Zaps in the future or edit the ones you've just created.
- For best results, share this checklist and any notes you may have taken with them.

7. Start Feeling Happier With Zapier

- You're done! Congrats on your successful Zapier set-up!

With Zapier's powerful automation saving you time, you can focus on that project you keep putting off, get involved in training new staff, or even go home a little early today. You've earned it.

Hitting some roadblocks in the setup process? You've got two Help Teams ready to get you back on track!
For questions about linking your account or utilizing Zapier with Jackrabbit, Check out our Help Center or send us an email at Support@Jackrabbittech.com. For questions about Zapier, setup and implementation, reach out to Zapier directly.

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