



ZAPIER  
*Version 1.0*

# LATEST CHANGES

Version 1.0 29/03/2019 Document Creation

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## INTRODUCTION

Zapier allows you to connect applications with each other. In Zapier there are two types of applications, the applications that trigger events and those that execute actions.

Applications that trigger events do communicate with those that execute actions.

An example of an event could be when a user enters a task in the Trello backlog. An example of action could be to send an SMS through 360NRS.

In this way we could send an SMS when someone introduces a task in the Trello backlog indicating which task has been added, on what date, to whom it is assigned, etc.

360NRS is an application capable of sending SMS when any event of any application occurs with all the information that the application provides.

## ACCOUNT CREATION

For the use and integration of the Zapier module with the different services provided on this platform it is necessary to have an account on it, which can be created at [www.zapier.com/sign-up/](http://www.zapier.com/sign-up/) using some basic data such as Email, names and password.

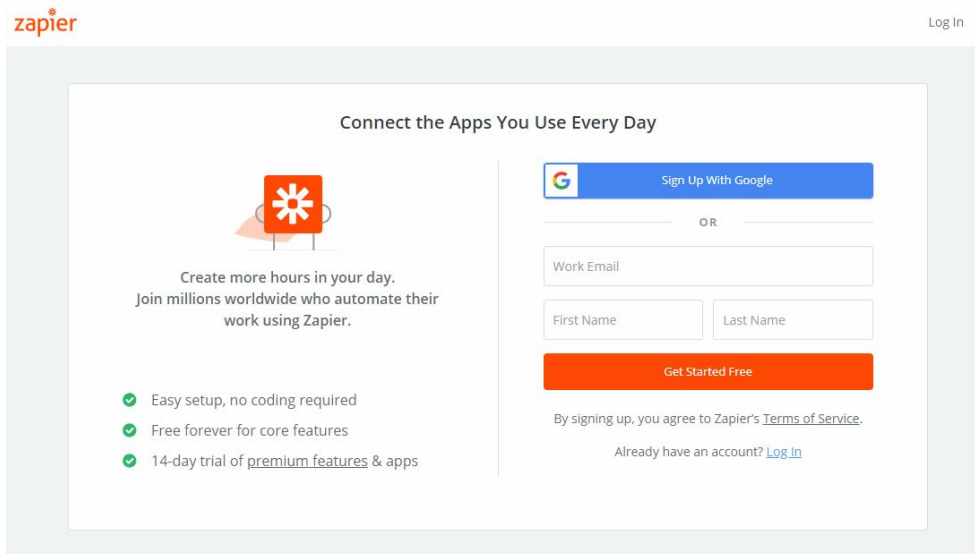


Illustration 1 - Account creation Module

When performing the account creation process or Login properly, we will enter the platform by displaying the login page where we are presented with different options for the creation of **ZAPS** (*Integrations between different APIs created in Zapier*).

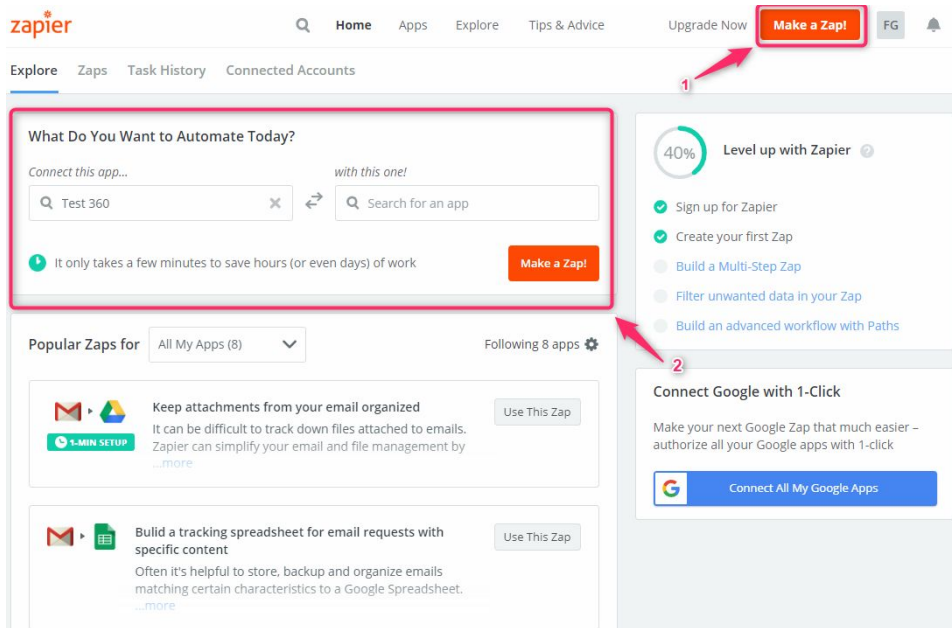


Illustration 2 - Home page with Zaps creation options

## INTEGRATION

As can be seen in illustration 2, to start the process of creating a **ZAP** we must press the button indicated above (*Make a Zap!*) And it will be necessary to follow a series of steps broken down below:

1. Direct function to the creation module, where we can select the trigger or initial APP of the ZAP, for the practical case we will use Google Calendar:

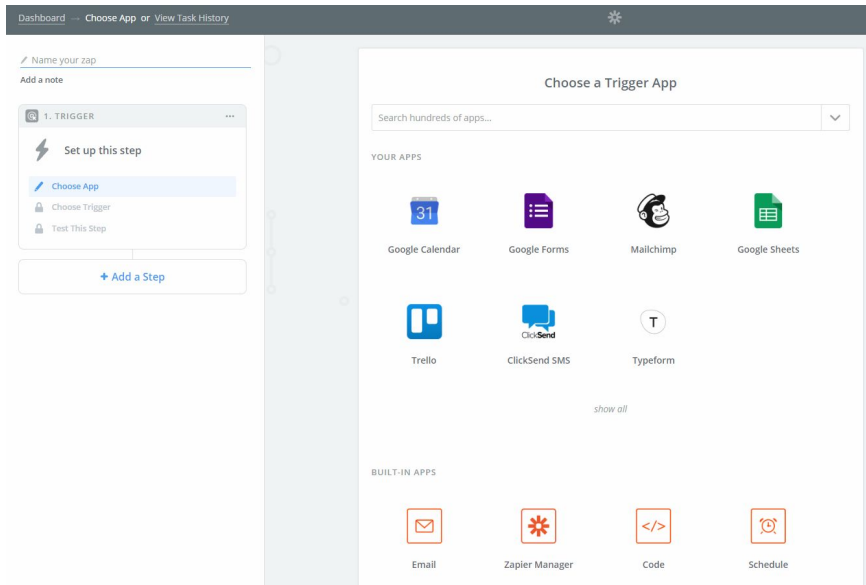


Illustration 3 - General view creation of ZAP mode 1

2. When selecting the desired APP, a series of possible integration events will be presented, these vary depending on each of them:

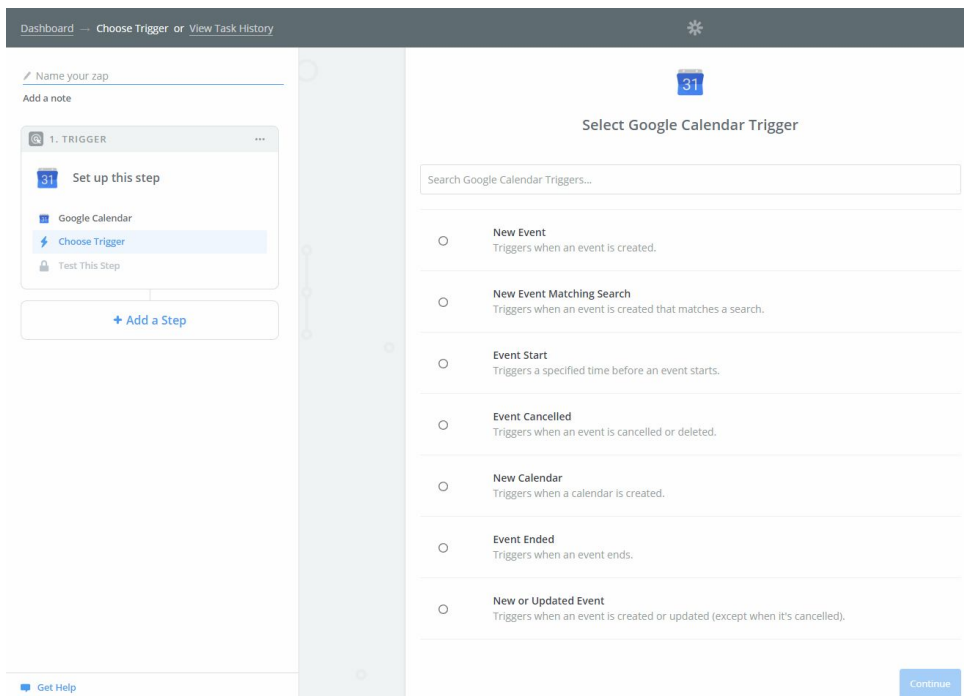


Illustration 4 - Available events Google Calendar

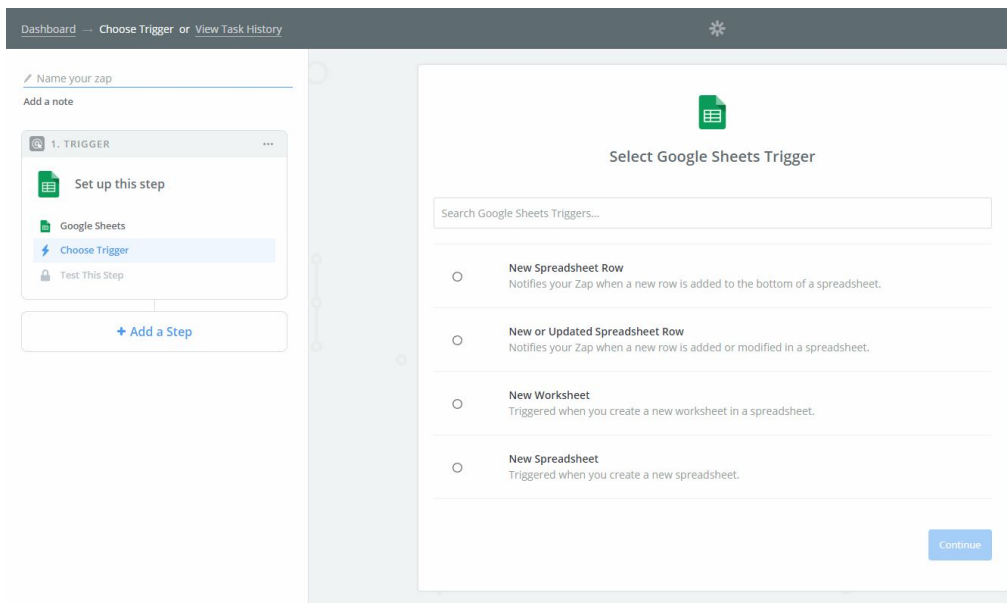


Illustration 5 - Available events Google Sheets

As can be seen in illustrations 4 and 5, the events available for Google Calendar are different from the events available for Google Sheets and their integration will depend on the needs of the end user.



3. Once the required event is selected (for the practical case, when a new event is created in Google Calendar), we will proceed to the next step in which authentication will be performed in the selected service, in this case Google.

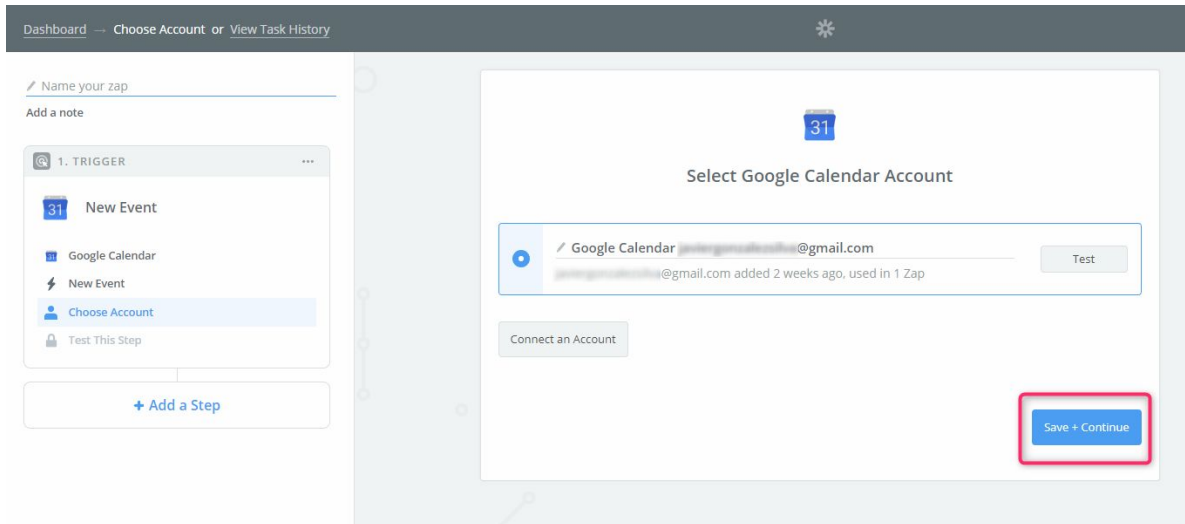


Illustration 6 - Google Authentication

4. In the next step, it will depend directly on the type of service selected above, in the case of Google Calendar, it will be required to select the Calendar associated with the account used in the previous step; in the case of Google Sheets for example, it will be required to select the own Document which will be taken as a reference, as well as the required document sheet.

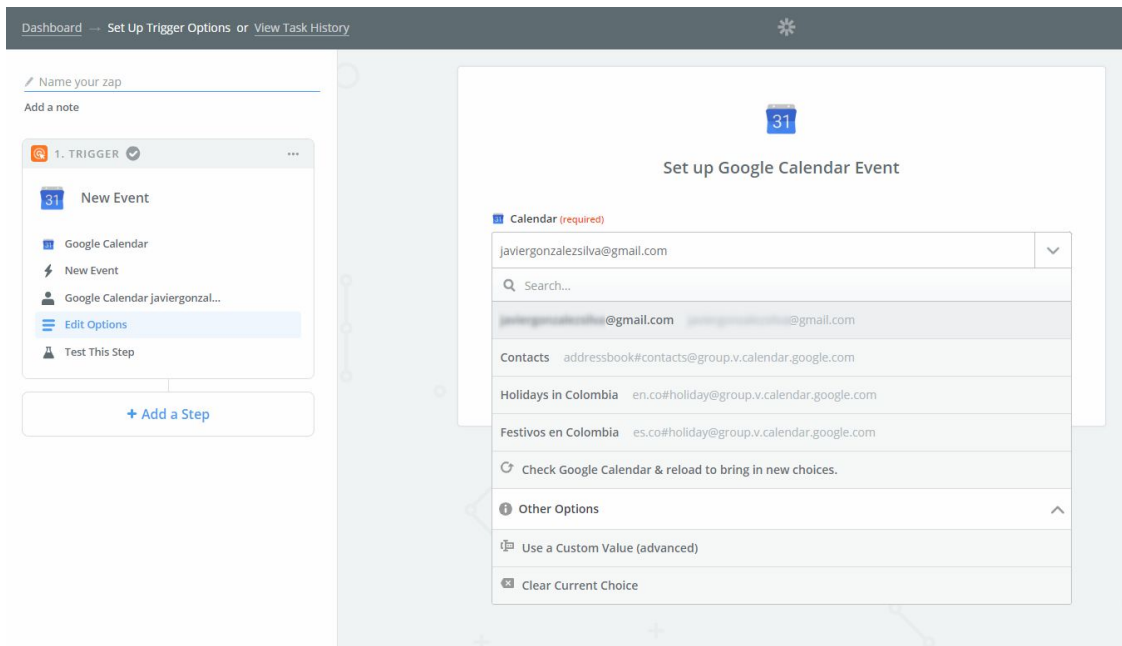


Illustration 7 - Example Google Calendar Selection

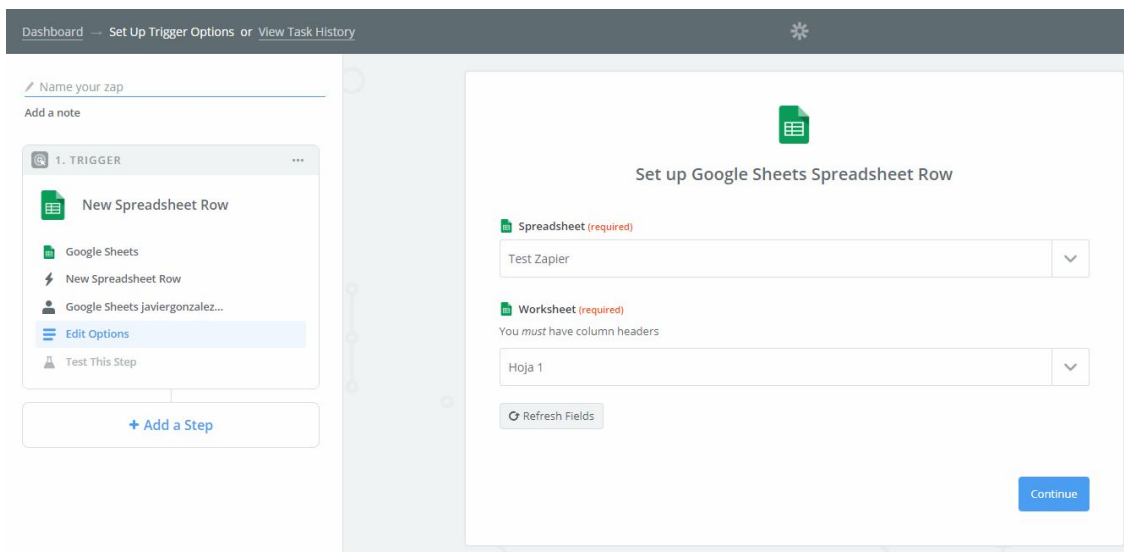


Illustration 8 - Google Sheets selection example

5. In the next step of integration, Zapier will present (if possible) templates to manage proof of information and better exemplify what the data brought by these services will be:

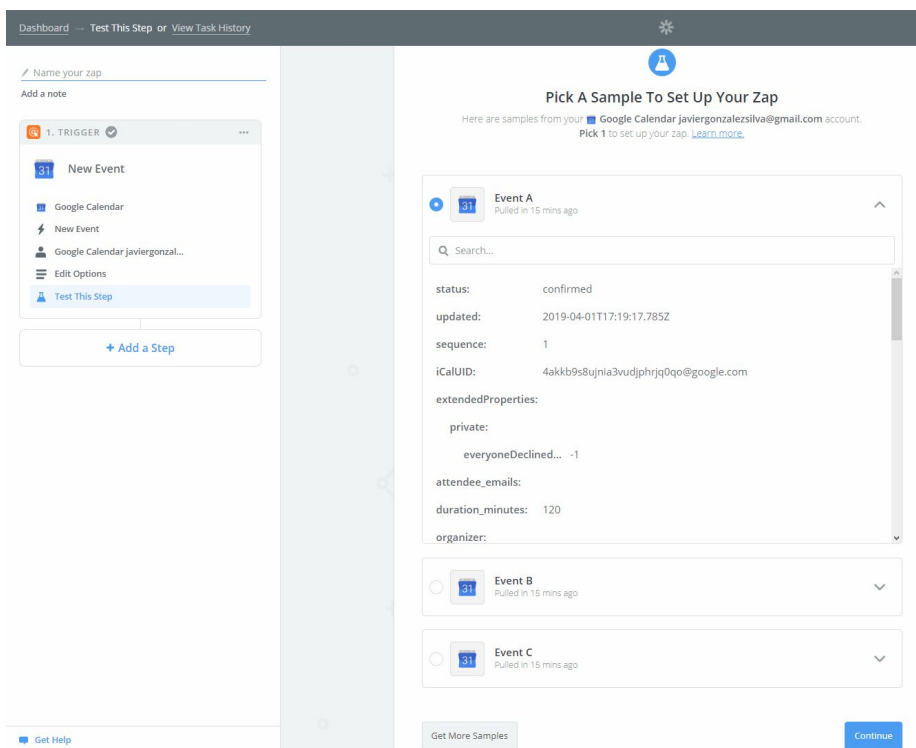


Illustration 9 - Google Calendar Test Templates

6. At the end of the configuration of the trigger or initial service (In this case Google Calendar), we will proceed to the integration with the **360NRS** APP (it can be found through the search engine provided), which will be found by pressing the button “**Add a Step**” (See *previous illustration*).

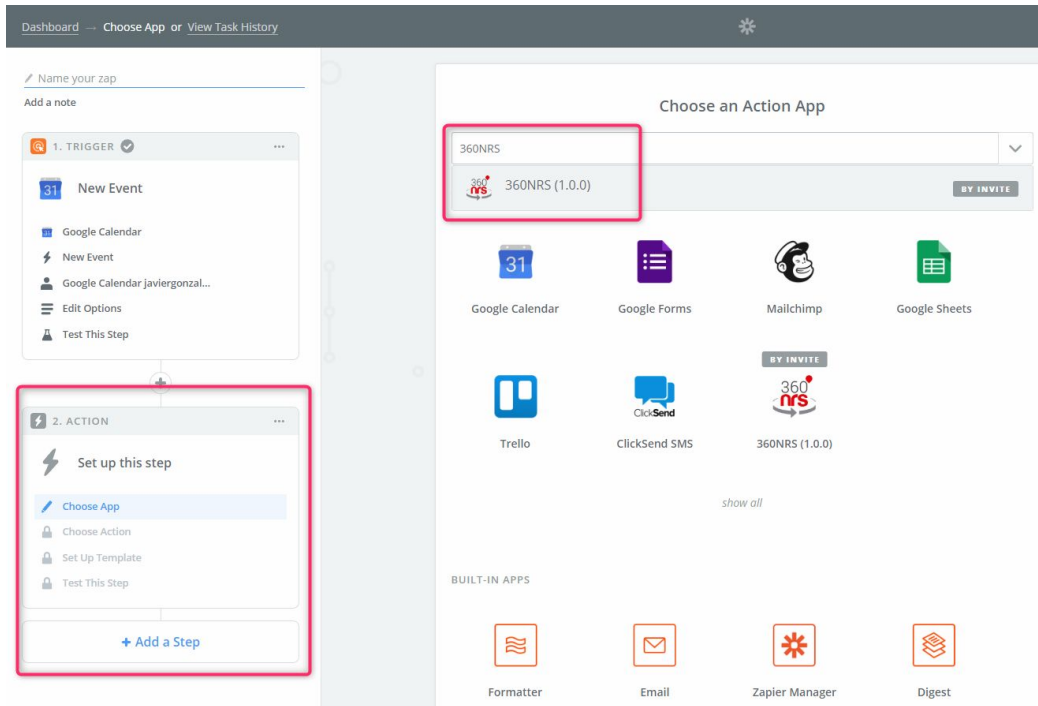


Illustration 10 - Search 360NRS App

7. When the 360NRS APP in Zapier is selected, the different options currently available for integration will be presented.

### 7.1. Text message sending:

The text message sending system uses a POST request to the 360NRS server and, using each user's own credentials, sends information via SMS. For the proper Zapier integration of the text message sending module, the following steps must be taken into account:

#### 7.1.1. Stock selection

When selecting the action that the **360NRS** APP should perform, the option “Send SMS” must be selected.

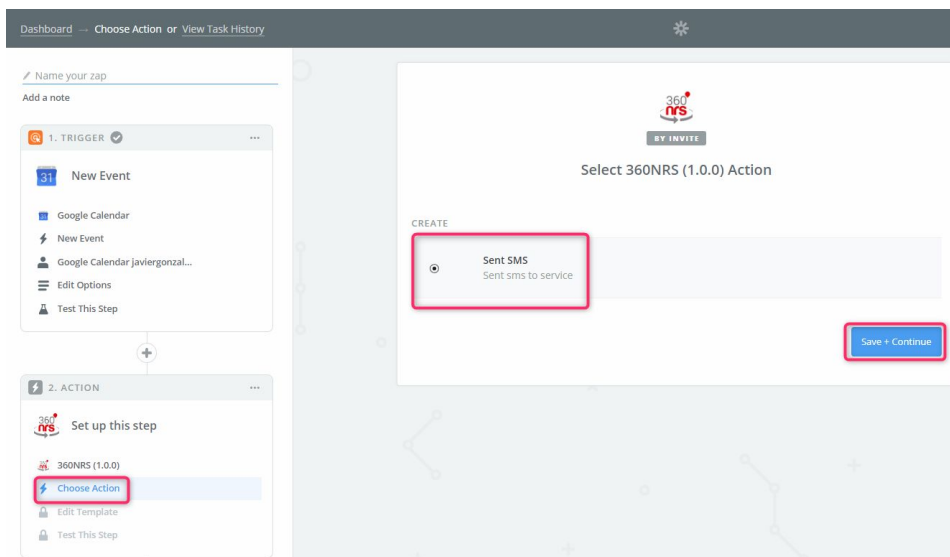


Illustration 11 - Event selection send SMS

### 7.1.2. 360NRS credentials

In the next step, you must press the button to add a new account, with this we can access the login module of the APP, allowing adequate access to the event.

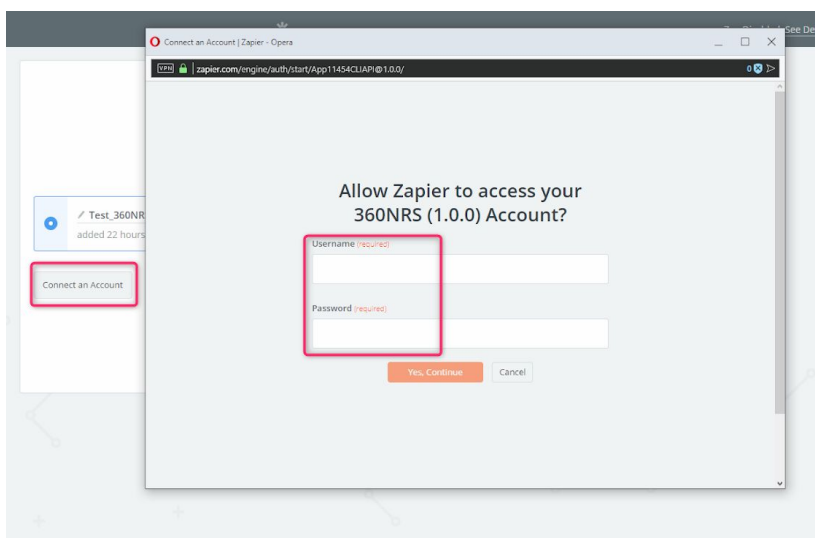


Illustration 12 - Add new account 360NRS

The username and API password are required.

**IMPORTANT:** The API password is NOT the password to the platform <https://dashboard.360nrs.com>, it is a different password that is used for APIs and connections with modules such as Zapier. To be able to specify your API password you must enter the platform <https://dashboard.360nrs.com> and once inside the top menu, access the "Profile" menu and "Change my API password".

### 7.1.3. SMS data

In order to send SMS, the following mandatory fields are required: **From**, **To** and **Message**, and the following optional **Campaign name**.

**From:** is the sender that will appear in the message.

**To:** is the recipient of the message. It is possible to add more than one recipient.

**Message:** is the message to be sent.

**Campaign name:** is the name of the campaign that will help us identify the campaign in the panel statistics at <https://dashboard.360nrs.com>

In any of these fields you can use custom fields that will depend on the application that launches the event. For example, if the application that launches the event is Trello we can use the name of the task in the SMS message, if it is Google Calendar we can use the time of the calendar event, etc.

To use the custom fields, press the button:



**From (required)**

ZAP



Name or sender number you want the receiver to see. Maximum 11 characters.

**To (required)**

34






-

+

Phone number or phone numbers you want to send to. International prefix is mandatory. E.g.: 34600000000

**Message (required)**

New event  **summary:** Example summary from  **start\_dateTime\_pretty:** Mar 02, 2018 10:00AM to  **end\_dateTime\_pretty:** Mar 02, 2018 11:00AM




Text you want to send by SMS.

**Campaign name (optional)**

Zapier



Introduce a campaign name if you want to identify this sending in the stats at [360nrs](https://dashboard.360nrs.com)

 Refresh Fields

*Illustration 13 - Data insertion*

As you can see in the previous illustration, you can enter fields from Google Calendar or any App used for this integration, as well as concatenate these with character strings as the following illustration.

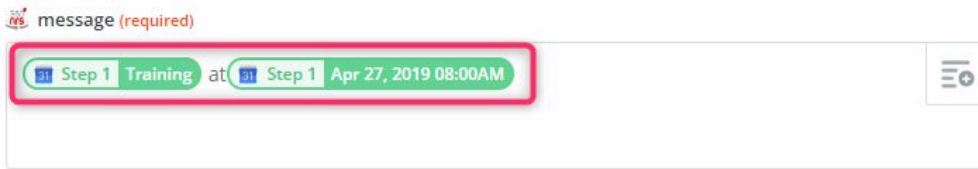


Illustration 14 - Custom fields insertion

### 7.1.4. SMS sending test

When going to the next step of the integration, templates will be offered depending on the data entered that will allow the user to test their integration before publishing it.

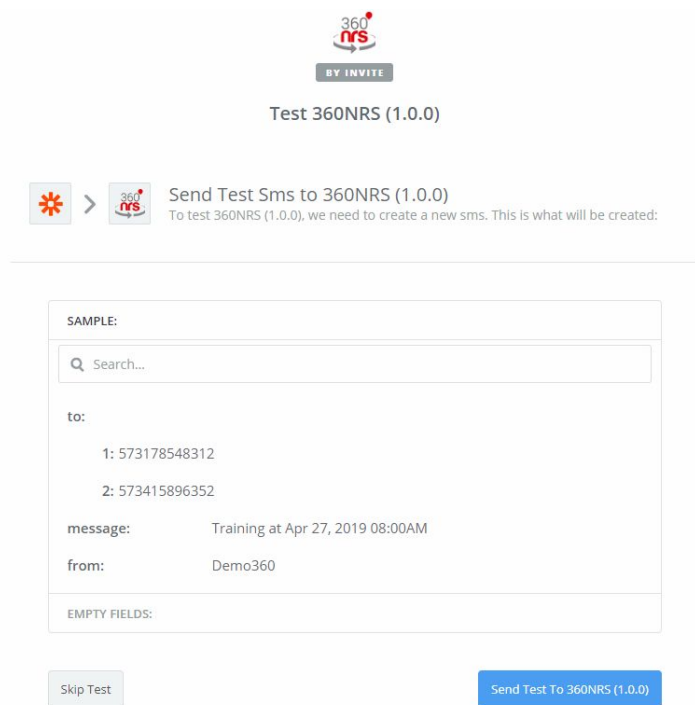


Illustration 15 - Test Zap

The test result will be shown:

The screenshot shows a successful test result for the 360NRS integration. At the top, there is a green notification bar stating "A Test sms was sent to 360NRS (1.0.0) about 1 minute ago." Below this, a white box displays the test data for "SAMPLE FROM 360NRS (1.0.0)". The data includes a search bar and the following fields: sendingId (null), result (0), to (573177348312), scheduledAt (null), expiresAt (null), parts (1), accepted (true), id (5ca383bdb9d8f), and campaignId (null). At the bottom of the white box, there are three buttons: "Re-test This Step", "Add a Step", and "Finish".

Illustration 16 - Test result

### 7.1.5. Zap name and activation

Finally, a name will be assigned to this new Zap and it will be activated, ending in this way the integration of **360NRS** with any App integrated in Zapier and for this case study with Google Calendar.

The screenshot shows the Zapier interface for naming and activating a Zap. At the top, there is a green checkmark icon. Below it, the text reads "Awesome! Your Zap is working." followed by "We recommend giving your Zap a name." A text input field contains "Google Calendar Demo" and is highlighted with a red box. Below the input field, there is a toggle switch labeled "YOUR ZAP IS" with "ON" and a green circle, also highlighted with a red box. At the bottom, there are two buttons: "See it on your dashboard" and "Make another Zap".

Illustration 17 - Name and Zap activation