Basics concepts

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If you are here is because you are a Vendor or Provider and you want to integrate Connect to your system. Good news!! With Zapier you will make your integration in a few hours!!
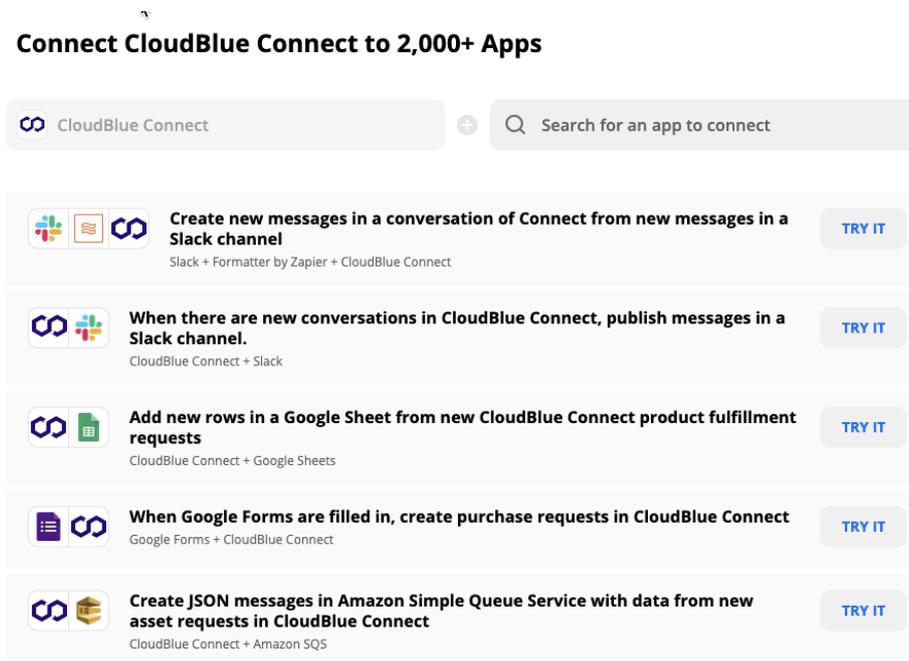
With Zapier you set one or more workflows with which your will automate your process end to end. Everyone this workflows are called "ZAP" and there are build by steps of Zapier APPs.

A Zap is an automated workflow that connects your apps and services together. Every Zap consists of a trigger step ("when this happens…") and one or more action steps ("then do this…"). When you turn your Zap on, it will run the action steps every time the trigger event occurs.

There are two ways you can create Zaps: with a Zap template or from scratch.

Create Zaps from templates

You can find pre-built Zaps (Zap templates) on your **Dashboard**, the **Zapier Explore page**, the **Zapier blog**, and **Cloudblue Connect APP**. To use a Zap template, click Use This Zap. (more info in this link)
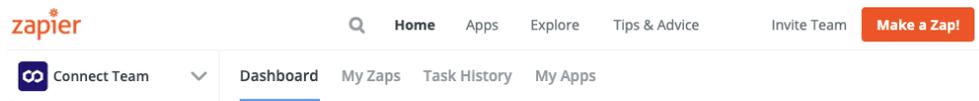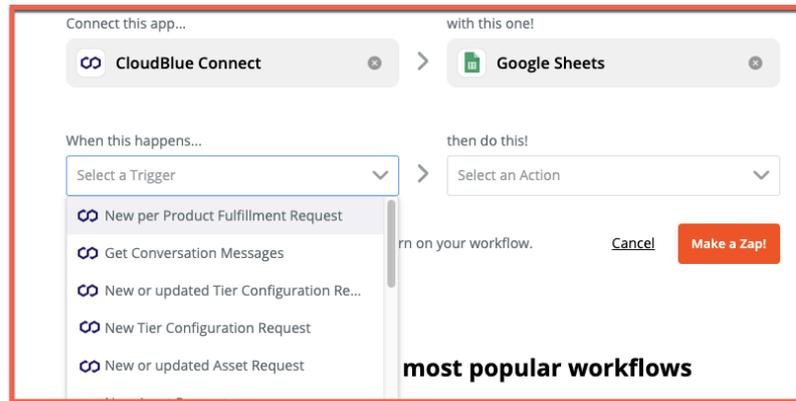

Create Zaps from scratch

You can also create your Zap from scratch. In the upper right of your Zapier account, click Make a Zap!. (More info in this link)

Zapier concepts

Before plan your workflow you must know a few concepts about Zapier

As mentioned, the Zaps are composed by steps.

There are four types of steps

Triggers

The triggers are how your app's users can start automated workflows whenever they add or update something the platform that you select. New emails, messages, blog posts, subscribers, form entries, commits, and much more are the initial data that underpin every Zap.

As triggers only watch for new data and typically need to send no or little data to the app, they're often quicker to setup than Zapier action steps. Zapier can watch for any new or updated item through your API—or optionally, you can include input fields for users to enter filters, tags, and other details to filter through new data and watch for the items they want.

Note: Triggers are displayed in the order they are added to Zapier integrations, so be sure to add your app's most important triggers first.

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Actions

Zapier actions push or put new data into apps through platform calls that pass data from user customized input fields.

Action steps in Zaps can create new items in an app or update existing items with a *create* action, or find existing items in an app with *search* actions (which can optionally be paired with create actions to add a new item if the search does not return a result). Every action additionally returns output fields detailing what was created—and that data can be used in subsequent steps to build detailed workflows.

Zapier does not allow action steps to delete or remove data, to prevent data loss. Action steps may only add or update data.

Note: Actions are displayed in the order they are added to Zapier integrations, so be sure to add your app's most important actions first.

Searches

Search steps can find items in apps. Then there are *Search* actions, which can find data in apps and optionally create new items if the search returns no results.

Searches find existing data, and fill in gaps if needed. Searches return an array of objects.

Search actions, then let users do more with the data they've already added to your platform. Perhaps they want to avoid adding duplicate items—and prevent errors from your workflow. Maybe they need to look up info about an item to use in a subsequent step. Or for workflows that are built around search—including weather, conversion, and contact lookup apps—search actions might be the integration feature where Zaps find info from this app then use it in subsequent steps.

Creates

Most Zapier integrations should at a minimum include create actions to let users add items to their platform automatically. That's what most Zaps do for people. They add new projects, tasks, contacts, invoices, leads, deals, files, photos, and much more to apps whenever they're needed. Create actions can also update existing items—something often paired with a Search to locate the item needing updates first.

Creates Also action steps can create items in apps. The most common actions shown at the top of each Zap action step are *Create* actions, which as their name implies make new items from the data users enter.

Creates return a single object to Zapier, usually the result ID of the creation.