Streamline Workflows with Omeda's Zapier Integration

OMEDA WEBINAR

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Your Host

Katie Robilotta

PRODUCT MANAGER

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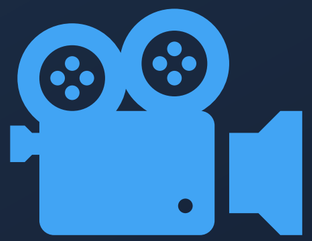

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Agenda: Everything Zapier

1. What is Zapier?
2. How does it work?
3. Key benefits
4. Omeda's new Trigger and Action
5. Use cases
6. How to get started
7. Live demo

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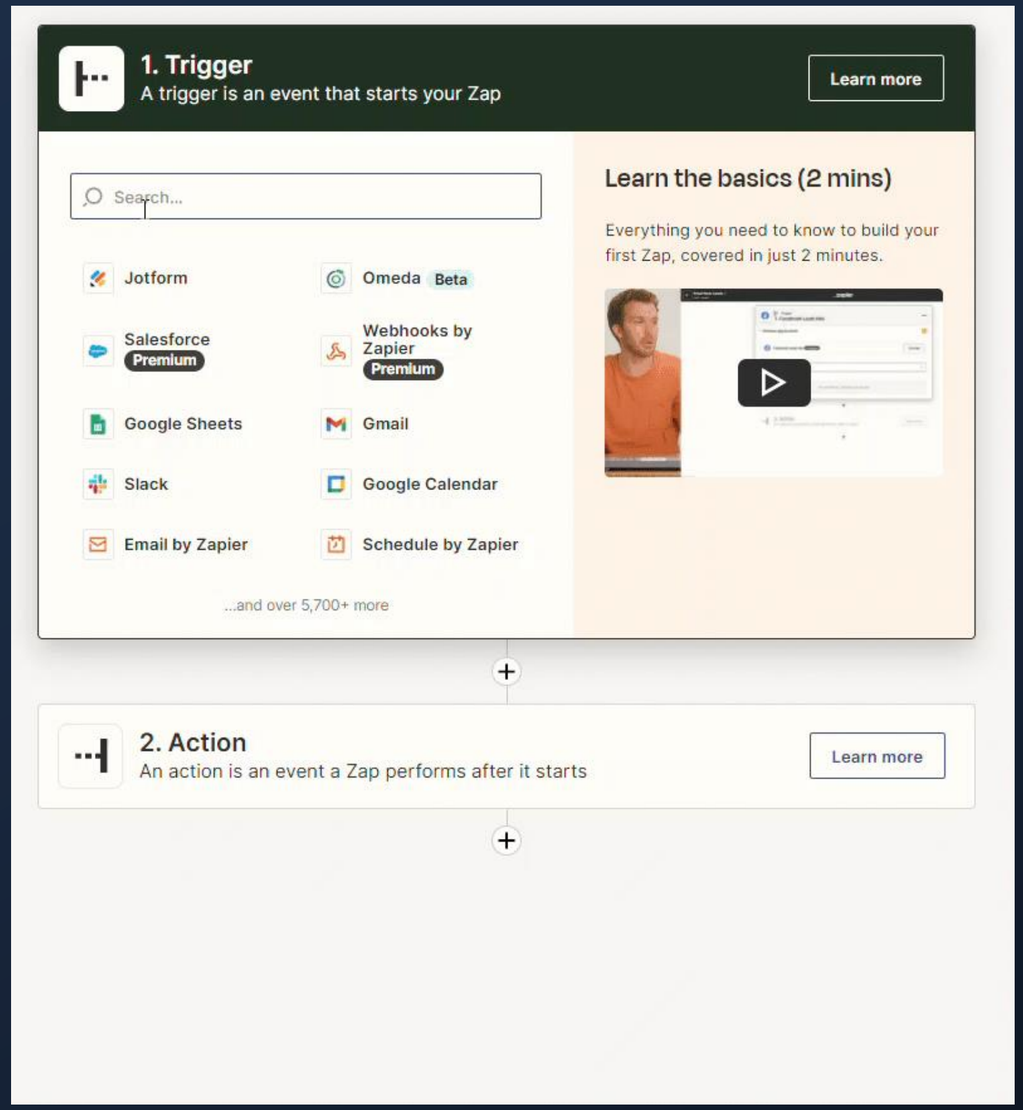
What is Zapier?

Zapier is a leading no-code process automation platform that connects data between web apps that are not linked via direct integrations.

Zapier lets you send your Omeda data to and from thousands of the most popular apps, so you can automate your work and have more time for what matters most — no code or CSS necessary.

How does Zapier work?



Zapier functions as a bridge between two different apps: the trigger app and the action app. Actions taken in the trigger app flow through to Zapier, causing one or more predetermined actions to be taken in another app ("action apps").

Typically, the trigger involves the addition of customer data to one app (i.e. an event registration, eBook download, demo request form submission), and the action involves the storage and/or activation of that customer data in the second app (creating a new contact, adding a new contact to a campaign, updating the contact's customer profile, etc.).

What are some benefits of using Zapier?

Connect Omeda with 5,000+ apps, including Salesforce, Eventbrite, Gravity Forms, Google suite, Jotform, GoToWebinar, Cvent, Microsoft suite, etc.

Code-free setup: Integrations can be set up quickly without separate code or developer assistance, then run on autopilot.

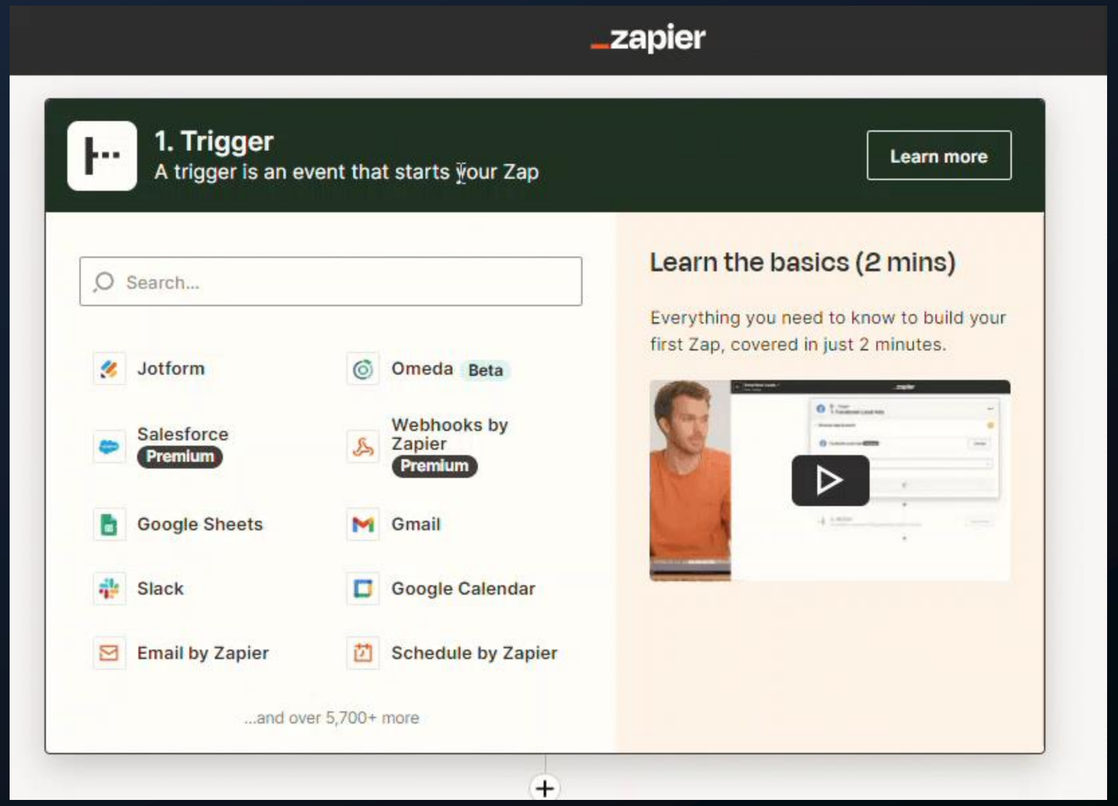
Customize output files and map data fields between Omeda and your chosen apps, so data is always stored in the right place for your needs.

Seamless automation: Trigger workflows between platforms, so activities that take place throughout the customer journey can be automated and replicated over and over.

Omeda's New Form Submission Trigger

Omeda's New Form Submission Trigger in Zapier can be used to send form submission data to 5,000+ apps. Data captured upon each Omeda form submission can be sent to a third-party.

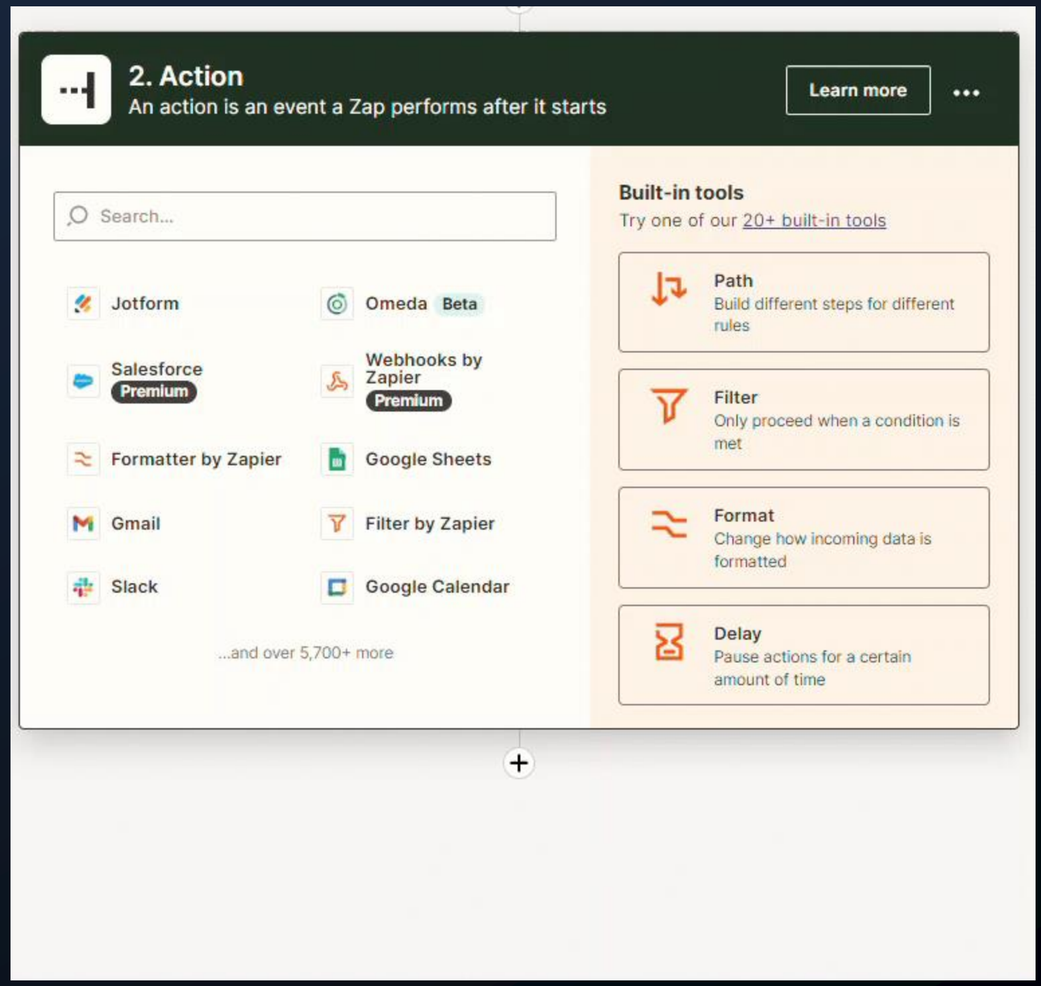
- Send data from a single form to a third-party app upon each form submission
- Choose what data you want to collect from the form
- Easily map the fields from the form to the third-party app
- No setup necessary in Omeda's Form Builder



Omeda's Add Customer Action

Omeda's Add Customer Action in Zapier allows you to easily bring customer data into Omeda based on some type of event from a third-party application.

- Allows you to pull in standard contact information & up to 10 products, 10 demographics, 10 deployments and 10 behaviors
- Choose which fields you want to bring into Omeda from the trigger event app
- Easily map the fields from the trigger event app to Omeda's fields



Use Cases

Zapier can connect Omeda with 5,000+ other apps. **Use cases include:**

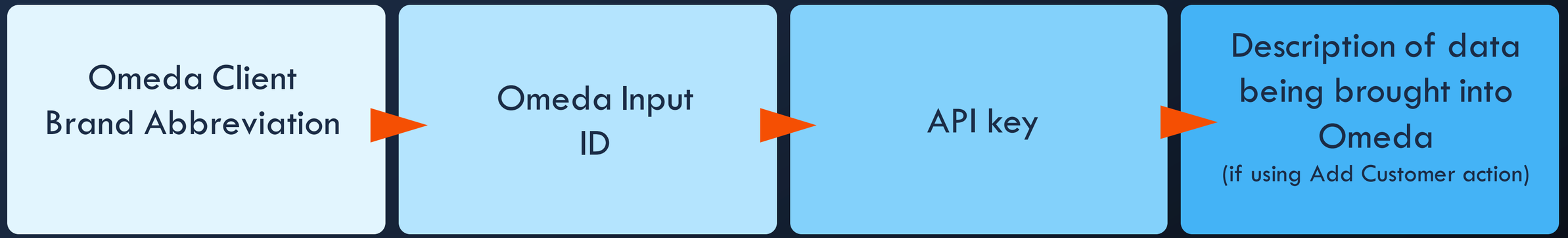
When someone completes an Omeda form, their information and form responses are automatically added to Salesforce as a new contact or lead record.

When someone completes an Omeda form, their information and form responses are automatically added to an ongoing campaign in Salesforce.

When someone schedules a demo on Calendly, their information is automatically added to Omeda’s Audience Builder as a new contact.

How to get started

To set up a Zap, clients will need both an Omeda account and a Zapier account. Clients will also need the following information to authenticate their Omeda account in Zapier (submit an API ticket to Omeda Support for this information):



Already have a Zapier account? Zapier account holders can log into Zapier and navigate to the Integration Builder. Select Omeda's new Form Submission Trigger or Omeda's Add Customer Action. Then map data between fields, customize the output file, and run a test of the integration before setting it live. (If you do not currently have an account, check out Zapier's pricing model to get started.)

Documentation

Introduction to Zapier integration:
https://training.omeda.com/knowledge-base/integration-with-zapier/

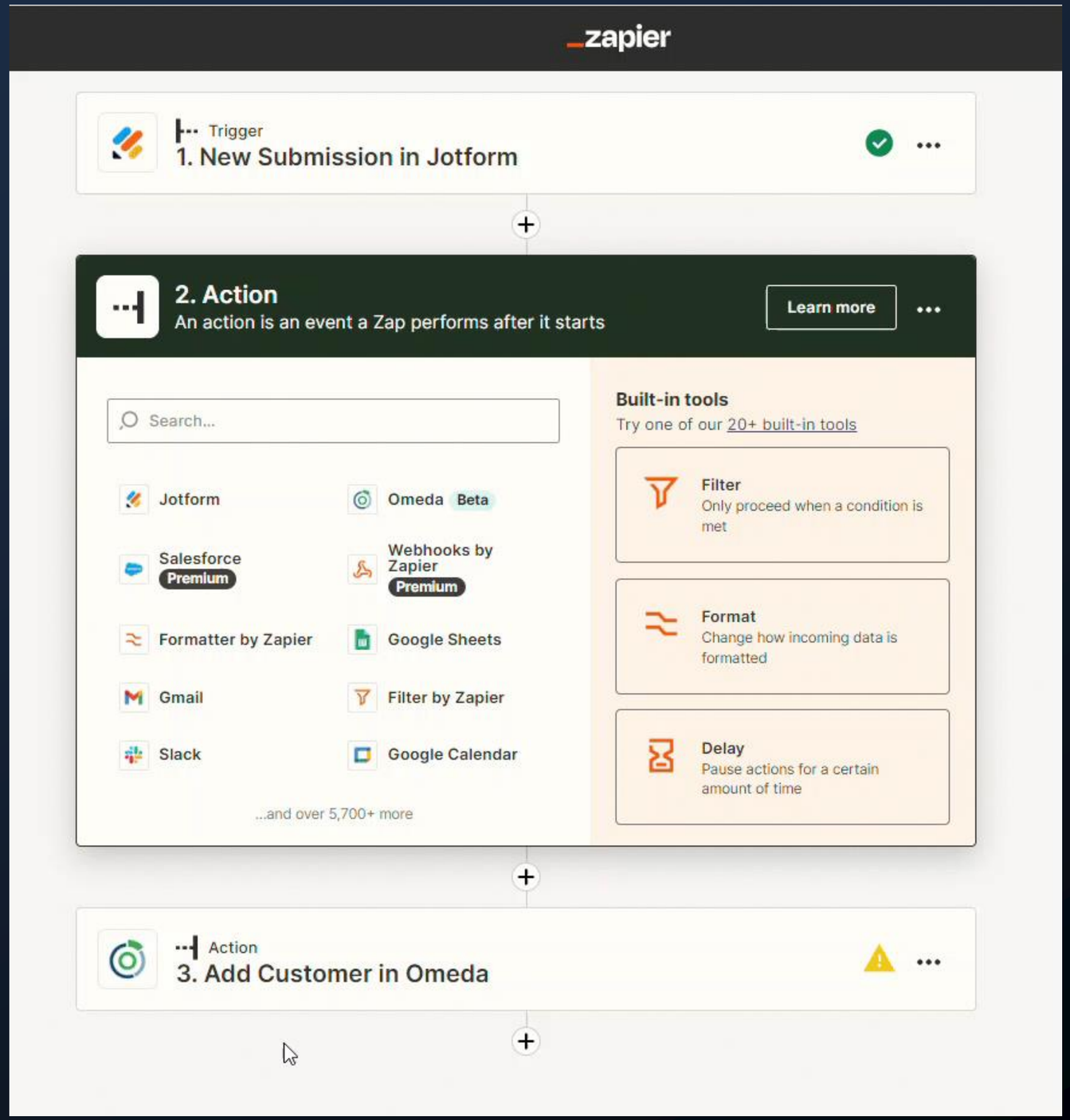
Send Form Submission data using Zapier:
https://training.omeda.com/knowledge-base/send-form-submission-data-via-zapier/

Bring data into Omeda using Zapier:
https://training.omeda.com/knowledge-base/bring-customer-data-in-using-zapier/

Formatter by Zapier:
https://training.omeda.com/knowledge-base/formatter-by-zapier-action/

Formatter by Zapier Action

Transform your incoming Demographic, Deployment Type, Product responses from your connected trigger app and map to the designated Omeda value so your data stays consistent and clean.



Demo

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Questions?

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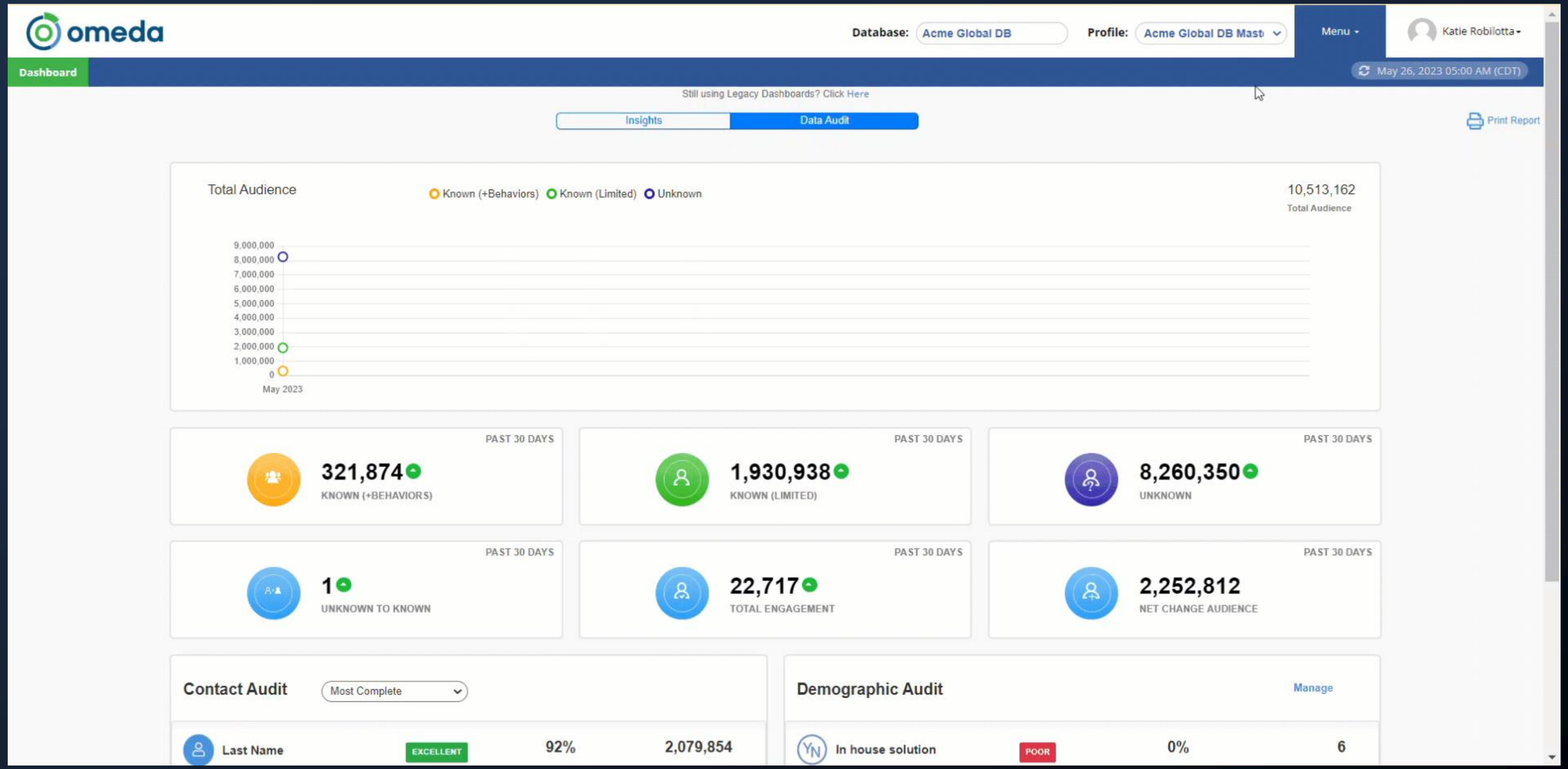
Got an Idea?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