



ZAPIER INTEGRATION CHECKLIST

There may be other tools and software you want to integrate with [ManyChat](#) to build a more robust marketing platform. ManyChat currently has a limited number of direct integrations, so the best way to bring in additional integrations is through Zapier.

With Zapier, there are over 1500 platforms you can integrate with ManyChat. Zapier serves as the buffer between your software and ManyChat. It talks back and forth to deliver data from one platform to another. For a complete list of integrations that work ideally with ManyChat, check here: <https://zapier.com/apps/manychat/integrations>

Some examples of things you could integrate with ManyChat are:

- ☐ Webinar signups
- ☐ Calendar bookings
- ☐ Email platforms not directly integrated
- ☐ Google Sheets to store data

Supported Triggers, Actions and Searches

The primary way Zapier communicates with other tools is by doing queries in the form of triggers, actions and searches.

A **trigger** is an event that “triggers” Zapier to take a specified action. When Zapier is connected to the software, it listens and waits for a trigger to occur. Any software can create a trigger, but only specific events unique to that software can create a trigger

ManyChat’s Supported Triggers

- ☐ New or Updated Custom Field — Triggers when you add/update a selected Custom Field for a user.
- ☐ New Subscriber — Triggers when a user subscribes to your page.

- ☐ New Tagged User — Triggers when a new Tag is added to a user.
- ☐ New “Trigger a Zap” Event — Triggers when your bot sends the “Trigger a Zap” event.
- ☐ Chat Opened — Triggers when a chat is opened with a user.

An **action** is what happens after a trigger is made by another software. This is where the magic happens. Now that Zapier has been activated by a trigger, you can now take data from the trigger software and pass it to the action software.

ManyChat's Supported Actions

- ☐ Subscribe User to Sequence — Subscribes a user to a Sequence.
- ☐ Unsubscribe User From Sequence — Unsubscribes a user from a Sequence.
- ☐ Send Text Message to User — Sends a text message to a user.
- ☐ Set Custom Field — Adds or updates a custom field value for a user.
- ☐ Add Tag to User — Adds a Tag to a user.
- ☐ Remove Tag From User — Removes a Tag from a user.
- ☐ Send Content to User — Allows admins to trigger whole flows right from Zapier that have pictures, videos, cards, User Inputs and Delays.

A **search** is another event you can have after a trigger. Once your trigger happens, you can use data from the triggering software and search another software to find matching records or look up values

ManyChat's Supported Searches

- ☐ Find User by Name — Finds a user by name.
- ☐ Find User by ID — Finds a user by ID.
- ☐ Find User by Custom Field — Allows admins to find users inside their ManyChat list by email without having to sync User IDs between systems.

Setting up & using Zapier

- ☐ Detailed setup instructions are found here:
<https://support.manychat.com/support/solutions/articles/36000003048-getting-started-with-zapier>

- ☐ Create your Zapier account. You can have a limited number of “zaps” with a free account. You’ll need a paid plan if you need to do multi-step zaps. HACK: You can create 2 single-step zaps in some cases.
- ☐ Connect your ManyChat account to Zapier according to instructions
- ☐ Connect your other software accounts to Zapier according to instructions
- ☐ Review the triggers, actions, and searches available for each software you’re using
- ☐ Identify the goal you want to accomplish with your integration
- ☐ Identify which software will be the trigger and which will be the action or search
- ☐ Identify the exact triggers and actions you will use for each software.
- ☐ Create your Zap - instructions here (Zapier has templates which you may find helpful, but I always start from scratch so I’m sure it does exactly what I want it to do):
<https://zapier.com/learn/getting-started-guide/build-zap-workflow/#scratch>
- ☐ Always be sure to test your Zap by going through the user experience in ManyChat. The test buttons in Zapier do not sufficiently test the entire user journey.

Now it gets super fun when you start integrating with other tools