

"HOW TO MAKE ZAPS" MANUAL



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DESCRIPTION

There are two ways of creating Zaps with the LiveWebinar platform:

1. "LiveWebinar + Action App" Zaps

In this case LiveWebinar is a trigger app, which is the app that is starts a Zap. This kind of Zap starts with an action that happens within the LiveWebinar platform. It could be the moment of creating a webinar, or a situation when a user registers for your webinar. Trigger examples can include actions like:

- Webinar creation/deletion
- Webinar update
- Webinar recording ready
- New lead/registrant
- Sub-account create/delete
- Sub-account status enabling/disabling

2. "Trigger App + LiveWebinar" Zaps

In this kind of Zap, LiveWebinar works as an Action App. This means that you have to start by choosing triggers that will cause actions in LiveWebinar. First you need to select a trigger app and then select LiveWebinar as an Action App. Next you have to decide how LiveWebinar is meant to behave in response to the trigger. There are two actions you can trigger in LiveWebinar:

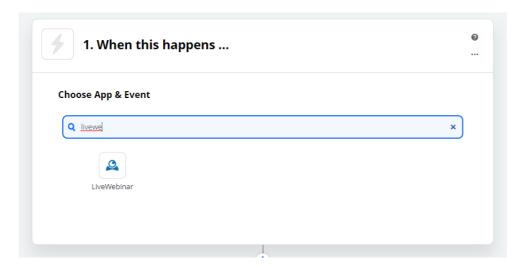
- Create New Registrant Creates a new registrant in a particular webinar with enabled registration
- Create New Webinar Creates a new webinar with a particular webinar name and start date

HOW TO SET UP "LIVEWEBINAR + ACTION APP" ZAPS

1. Go to the following link to add LiveWebinar to your Apps

https://zapier.com/apps/livewebinar/integrations

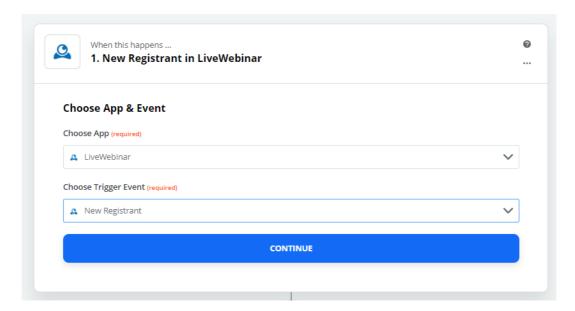
2. Click "Create a Zap" and enter LiveWebinar in the search box or, if you've already connected apps to Zapier, click on the app icon shown here:



3. Choose an action trigger

Pick the specific trigger for the app from the list of options. Trigger examples can include events like:

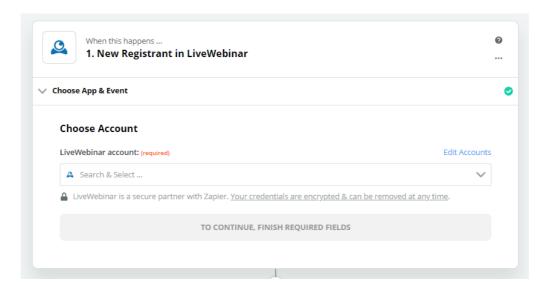
- New lead/registrant
- Webinar create/delete
- Webinar update
- Webinar status enable/disable
- Webinar recording ready
- Sub-account create/delete
- Sub-account status enable/disable



In this example we select New Registrant, because we want to trigger event every time when someone registers on your webinar.

4. Connect your account

Choose a LiveWebinar account that is already connected to Zapier or click the "Sign in" button to add a new account. A pop-up will appear, prompting you to authorize Zapier to connect to the app. Allow Zapier to have access to your LiveWebinar account. Click "Authorize" and then "Continue".

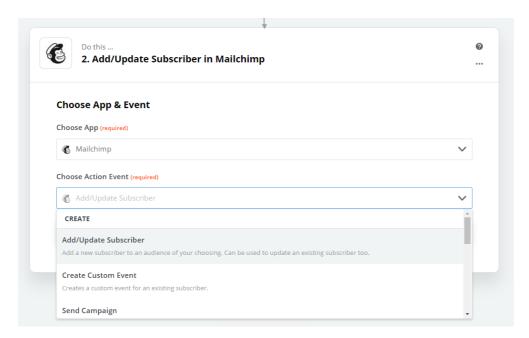


5. You can run a quick test if you want to make sure that your Zaps will work properly.

6. Choose Action App & event

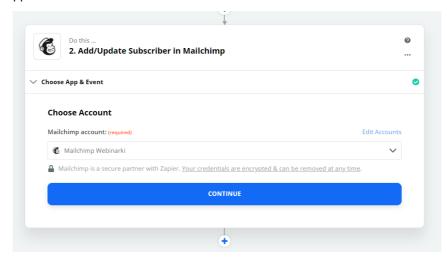
First you need to choose the Action App. Type in the name of the app you want the action to be applied to. In this example, we'll use Mailchimp

You need to choose how you want the app to behave in response to the trigger. Action examples include Add/Update Subscriber or Add Subscriber to Tag. In this example, we'll choose Add/Update Subscriber. Click "Continue".



7. Connect or select your account

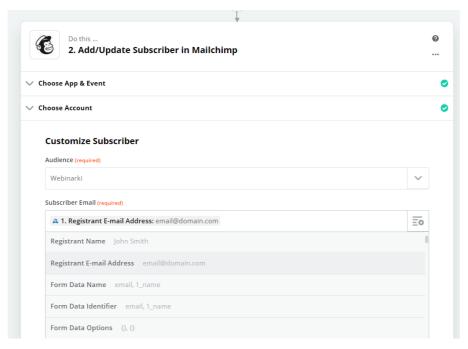
Now you need to connect or select your account. Choose an account that is already connected to Zapier or click the "Sign in" to button to add a new account. A pop-up will appear, prompting you to authorize Zapier to connect to the app. Then click "Continue".



8. Customize your Zap

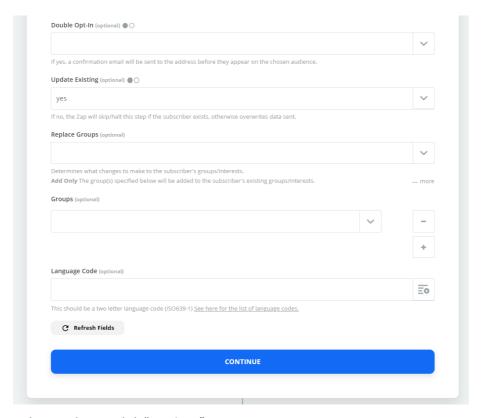
Now you need to customize your Zap. In this step, you can tell the Zap exactly what you want it to do with the data from the trigger app by filling in the blank fields here. Use the dropdown menu in every field to tell Zap to pull in data from the Trigger step. In this case, we set our Zap to Create a New Subscriber in Mailchimp every time a new participant finishes your webinar registration.

Once you click on the dropdown menu, a list of data from your trigger app (LiveWebinar) will appear. You'll likely want to choose the data points from your trigger app that most closely match the field in your Action App.



Some fields are required. For example, if your action is to add a subscriber in MailChimp, you'll need to select the audience in which this subscriber belongs and choose their email address. To do this, select "Registrant Email Address" in the "Subscriber Email" field. This way, the Zap will put the correct email into the profile of the new subscriber.

Other fields are optional but are often still important to fill out. In this case you can choose if you want to update the existing profile of a subscriber or assign them to one of your Mailchimp groups.



Once you've made your choices, click "Continue".

9. Test the action.

You'll see which information from the trigger app will be sent to the Action App. Click the "Create & Continue" button to make sure this step works as intended.

Finally, click the "Done Editing" button. Be sure to give your Zap a name by clicking the pencil in the top left corner of the editor. Then toggle the "On/Off" button at the bottom of the page to "On". Your Zap will run automatically from now until you turn it off.



The construction of this Zap will be the same when you use the New Lead trigger in the first step. The only difference is that Zap will launch every time someone fills out any of your Lead Forms assigned to an active webinar.

You can do a similar Zap with the following marketing automation platforms:

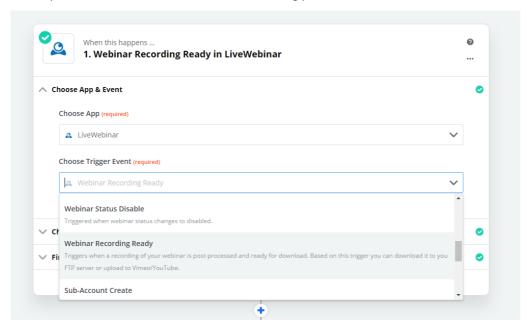
https://zapier.com/apps/categories/email-newsletters

https://zapier.com/apps/categories/email

Zaps with "Webinar Recording Ready" trigger

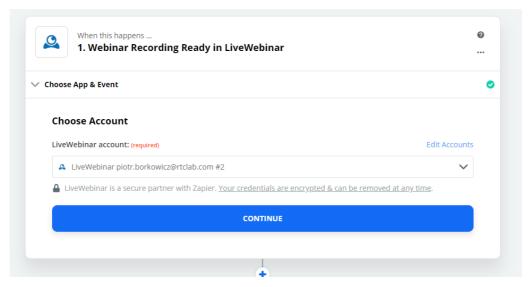
Choose action trigger

The "Webinar Recording Ready" trigger works when a recording of your webinar is post-processed and ready for download. Based on this trigger you can upload it to your Cloud Drive like Google Drive or Dropbox or upload it directly to Vimeo, YouTube or another video hosting platform.



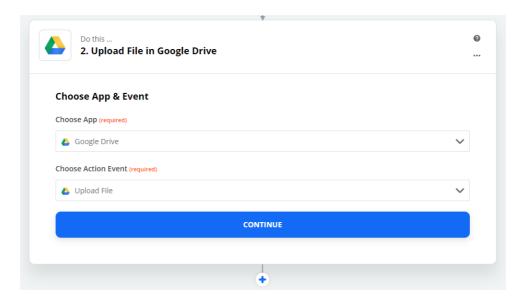
2. Connect your account

Now you need to connect or select your account. Choose an account that is already connected to Zapier or click the "Sign in" to button to add a new account. A pop-up will appear, prompting you to authorize Zapier to connect to the app. Then click "Continue".



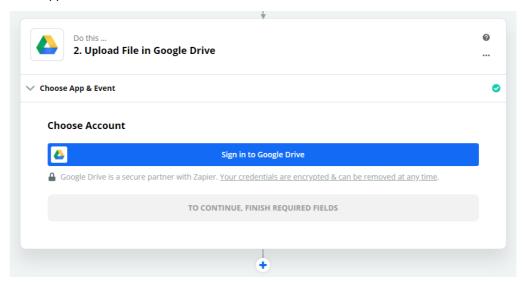
3. Choose an Action App

Choose any application which can receive your recording. It can be a video hosting platform like YouTube or Vimeo. You can also select a Cloud Drive like Google Drive or Dropbox.



4. Connect or select your account

Now you need to connect or select your account. Choose an account that is already connected to Zapier or click the "Sign in" to button to add a new account. A pop-up will appear, prompting you to authorize Zapier to connect to the app. Then click "Continue".

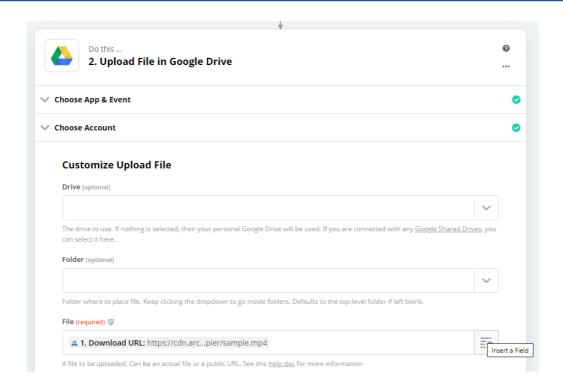


5. Customize your Zap

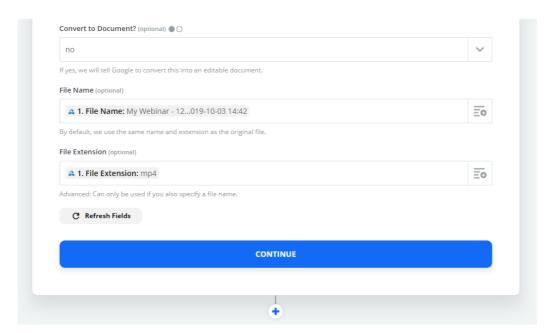
Now you need to customize your Zap. In this step, you can tell the Zap exactly what you want it to do with the data from the trigger app by filling in the blank fields here.

In the "File" field click "Insert a Field" button. Once you click on the dropdown menu, a list of data from your trigger app (LiveWebinar) will appear.

You'll likely want to choose the data points from your trigger app (LiveWebinar) that most closely match the field in your Action App. In this case it's recommended to select the "Download URL" option as on the screen below.



Other fields are optional. However, you can tell the Zap exactly what data you're looking for by filling in the fields. In the "File Name" field, you can select "File Name". This is the way to have your Zap put the Webinar Room ID (the one which video concerns) as the name of every transferred recording. Optionally you can select the "File Extension" option in the "File Extension" field to tell your Zap about the format of the recording.



6. Test the action.

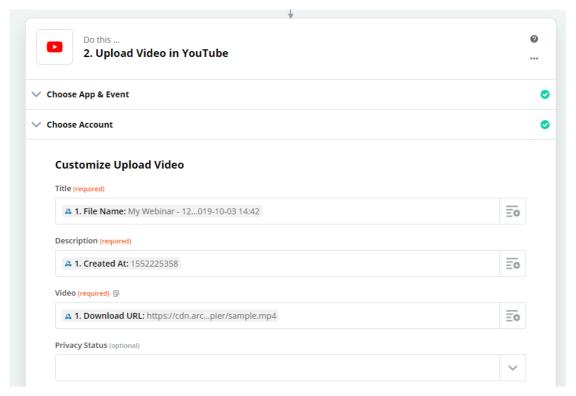
After you confirm which information from the trigger app will be sent to the Action App click the "Create & Continue" button to make sure this step works as intended.

Finally, click the "Done Editing" button. Be sure to give your Zap a name by clicking the pencil in the top left corner of the editor. Then toggle the "On/Off" button at the bottom of the page to "On". Your Zap will run automatically from now until the moment you turn it off.

Zaps with "Webinar recording ready" trigger + YT/Vimeo/others **Action Apps**

- 7. Repeat Steps 1-5 using LiveWebinar as an Trigger App, then choose a video hosting platform (like YouTube) as the Action App.
- 8. Choose "Upload Video" as Action Event and customize your Zap

If you want to upload your recording directly to YouTube/Vimeo or another video hosting platform you must choose YouTube as the Action App and "Upload Video" as the action event. Then customize your Zap in the following way:



You'll likely want to choose the data points from your trigger app (LiveWebinar) that most closely match the field in your Action App (YouTube). In this case making a Zap with YouTube require filling "Title", "Description" and "Video" fields.

First, you need to insert the "File Name" in the "Title" field. This is the way you will choose a title for your future YouTube video. As a description you may select the date when the recording was created. To do this, choose "Created at" in the "Description" field. Then you have to give Zapier the URL of the recording, which has to be uploaded – select "Download URL" from dropdown list in the "Video" field.

9. Test the action.

After you confirm which information from the trigger app will be sent to the Action App click the "Create & **Continue"** button to make sure this step works as intended.

Finally, click the "Done Editing" button. Be sure to give your Zap a name by clicking the pencil in the top left corner of the editor. Then toggle the "On/Off" button at the bottom of the page to "On". Your Zap will run automatically from now until the moment you turn it off.

Zaps with "Create/Delete Webinar or Webinar Update" triggers

Important

The construction of this Zap will be the same as when you use the Webinar Delete or Webinar Update triggers in the first step. The only difference is that the Zap will be activated every time you will delete a webinar (Webinar Delete trigger) or change any of its details (Webinar Update trigger).

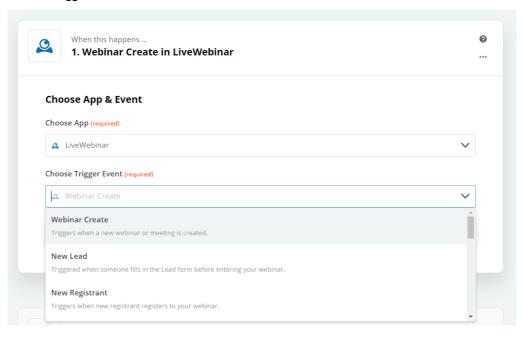
The construction of this Zap will be the same as when you use the Webinar Status Disable or Webinar Status Enable triggers in the first step. In this case, Zap will be activated every time you will disable or enable any webinar from the list of your scheduled, permanent or past meetings.

This kind of Zap can be used with lot of other Action Apps including Calendars, Notes, Social Media platforms, Team Chats and Notifications.

In the following example we'll create a Zap which will tell your team on your Slack channel about every created webinar in LiveWebinar.

1. Click "Create a Zap" and enter LiveWebinar in the search box or, if you've already connected apps to Zapier, click on the app icon.

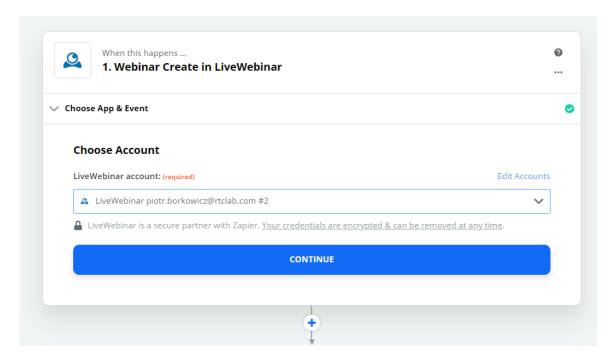
2. Choose Trigger Event



In this example we select Webinar Create, because we want to trigger further action every time when a webinar is created on your LiveWebinar account.

3. Connect your account

Choose a LiveWebinar account that is already connected to Zapier or click the "Sign in" to button to add a new account. A pop-up will appear, prompting you to authorize Zapier to connect to the app. Allow Zapier to have access to your LiveWebinar account. Click "Authorize" and then "Continue".



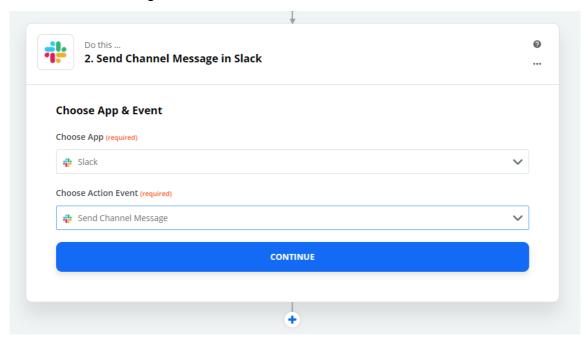
You can run a quick test if you want to make sure that your Zaps will work properly.

5. Choose Action App & Event

You need to choose how you want the app to behave in response to the trigger.

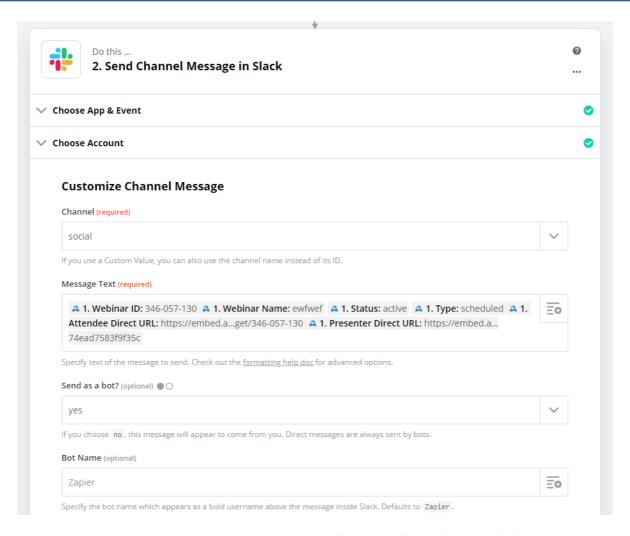
First you need to choose the Action App. Type in the name of the app you want the action to be applied to. In this example, we'll use Slack. Because we want to send a message on a particular Slack Channel every time when you create a webinar (users who belong to this channel will hear about it).

Select "Send Channel Message" as the Action Event. Then click "Continue".



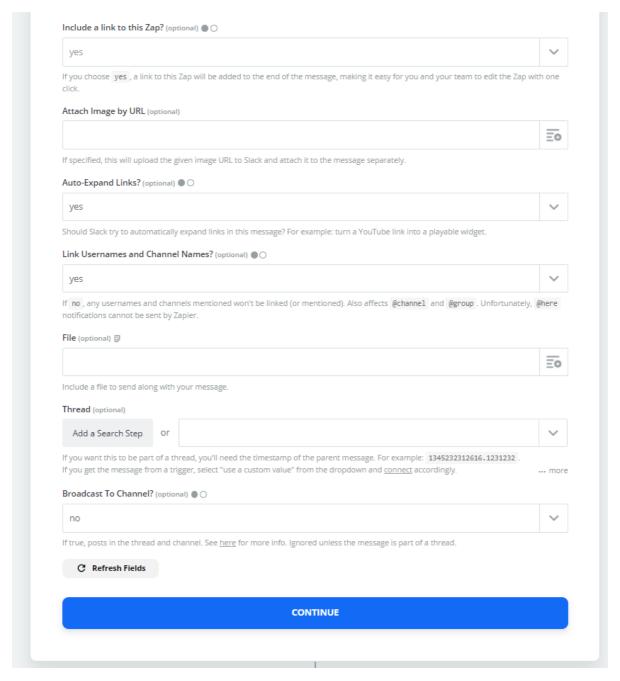
6. Customize your Message

Now you need to customize your Zap. In this step, you can tell the Zap exactly what you want it to do with the data from the trigger app by filling in the blank fields here.



As you can see on the screen below there are two required fields. One of them (Channel field) concerns the channel to which our notification will be sent. Another one regards text of the message. In this field it's recommended to put data categories from the Trigger App (LiveWebinar). In the example we've added the "Webinar ID", its title ("Webinar Name"), type ("Type"), status ("Status") and two room URLs: one for a regular participant ("Attendee Direct URL") and one for the presenter ("Presenter Direct URL").

The rest of the fields are optional. According to your preferences you can decide if Slack should add a link to your email at the end of the message or if it should mention any usernames or other channel names.



7. Click continue and Test your Zap.

When you authorize all information from the trigger app which will be sent to the Action App, click the "Create & Continue" button to make sure this step works as intended.

Finally, click the "Done Editing" button. Be sure to give your Zap a name by clicking the pencil in the top left corner of the editor. Then toggle the "On/Off" button at the bottom of the page to "On". Your Zap will run automatically from now on until you turn it off.

Zaps with "Create/Delete Sub-account" trigger

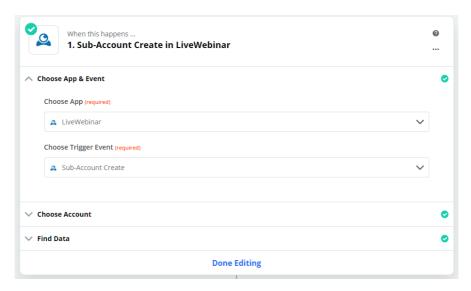
Important

The construction of this Zap will be the same when you use the "Sub-account Delete" trigger in the first step. The only difference is that the Zap will be activated every time when any Sub-account belonging to your LiveWebinar account will be deleted.

Also, the construction of this Zap will be the same when you use "Sub-account Status Disable" or "Sub-account Status Enable" triggers. In this case, Zap will be activated every time you will disable or enable any Sub-account belonging to your LiveWebinar account

This kind of Zap can be used with lot of other Action Apps including Calendars, Notes, Social Media platforms, Team Chats and Notifications.

- 1. Click Create a Zap and enter LiveWebinar in the search box or, if you've already connected apps to Zapier, click on the app icon.
- 2. Choose Trigger App & Event



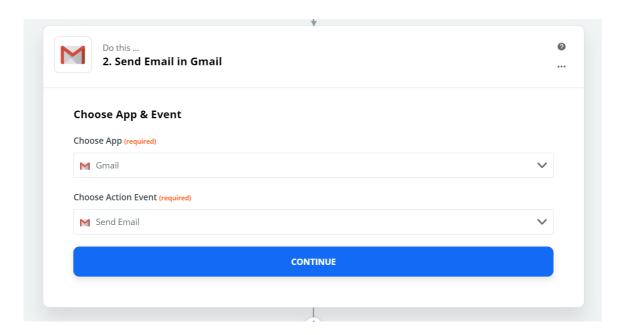
In this example we select "Sub-account create", because we want to trigger further actions every time a subaccount is created on your previously connected LiveWebinar account.

3. Connect your account

Choose a LiveWebinar account that is already connected to Zapier or click the "Sign in" to button to add a new account. A pop-up will appear, prompting you to authorize Zapier to connect to the app. Allow Zapier to have access to your LiveWebinar account. Click "Authorize" and then "Continue".

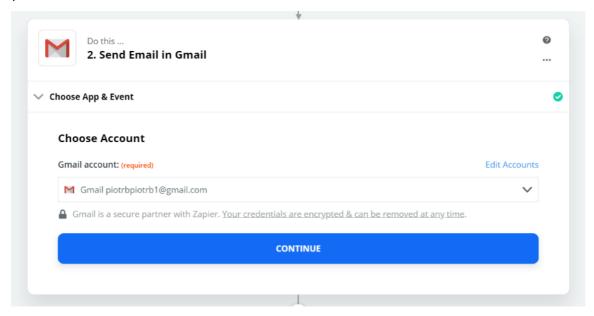
4. Choose Action App & Event

Type in the name of the app you want the action to be applied to (it can be the same app as your trigger app or a different one). In this example, we'll use Gmail because we want to send an email with the information about created (or deleted) Sub-account.



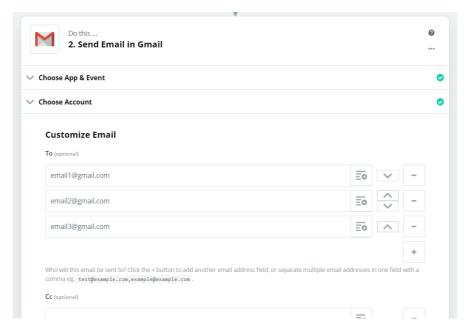
5. Connect your account

Choose a Gmail account that is already connected to Zapier or click the "Sign in" button to add a new account. A pop-up will appear, prompting you to authorize Zapier to connect to the app. Allow Zapier to have access to your Gmail account. Click "Authorize" and then "Continue".



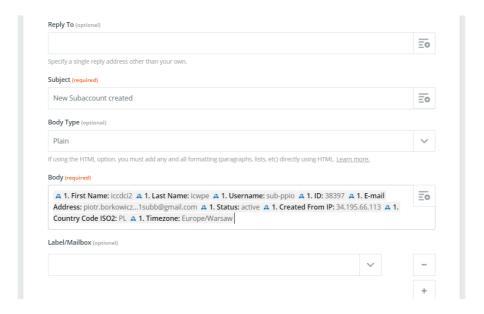
6. Customize your email

Now you need to customize your Zap. In this step, you can tell the Zap exactly what you want it to do with the data from the trigger app by filling in the blank fields here. Start from filling "To" Field by putting here addressees of your email.

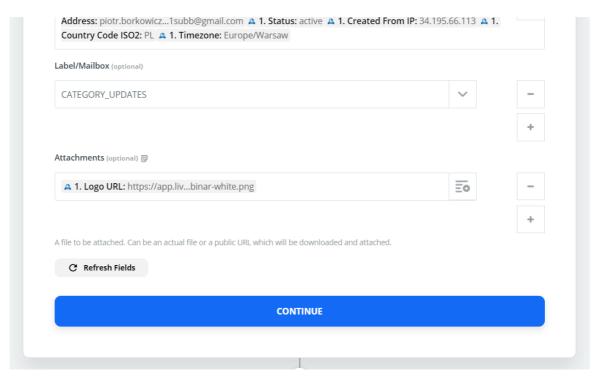


Then fill in the required fields. In this case it's mandatory to put data into subject and body fields. First you should create a title for your email. We recommend writing here name of your trigger. In this case we named our email "New sub-account created", because that's the previously selected trigger (Sub-account create).

In the next required field named "Body", you have to open the dropdown list and choose which data about the newly created sub-account will be included in your email. In the following example we include the "First Name" and "Last Name", the "Username", its "ID" and "Email Address", "Status", "IP" from which subaccount was created, "Country Code" and "Timezone".



The rest of the fields are optional, and you don't have to fill them. However, you can assign this email to particular category (we've selected CATEGORY_UPDATES). Fill out this field if you want your email to be received in the one of the main Gmail mailboxes. You can also add an attachment consisting of data about this sub-account.



7. Click continue and Test your Zap.

When you authorize all information from the trigger app, click the "Create & Continue" button to make sure this step works as intended.

Finally, click the "Done Editing" button. Be sure to give your Zap a name by clicking the pencil in the top left corner of the editor. Then toggle the "On/Off" button at the bottom of the page to "On". Your Zap will run automatically from now until the moment you turn it off.

HOW TO SET UP "TRIGGER APP + LIVEWEBINAR" ZAPS

LiveWebinar as Action App

This kind of Zap starts from choosing triggers that will be causing actions in LiveWebinar. First you need to select a trigger app and then LiveWebinar as an Action App. Next you have to decide how LiveWebinar is meant to behave in response to the trigger. There are two actions you can trigger in LiveWebinar:

- Create New Registrant Creates new registrant in particular webinar with enabled registration
- Create New Webinar Creates new webinar with particular webinar name and start date

Zaps with "Create New Registrant" Action Event

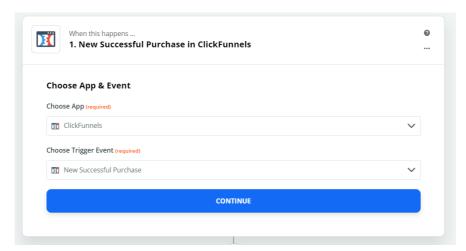
Important

First, we need to choose our trigger app, which will be causing an action in LiveWebinar. It could be an app which is first in our webinar funnel. It can be any service with landing pages, form subscriptions and payment features like ClickFunnels, Thrive Themes, PipeDrive, Instapage, HeySummit or Unbounce.

If you have automated webinar funnel and you're selling tickets for your online events through these platforms this manual could be useful if you want to add a list of registrants to the existing LiveWebinar or **Evergreen Webinar.**

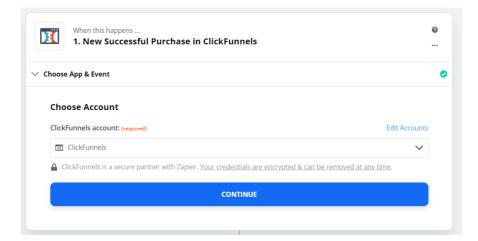
In this case we'll make a Zap starting from ClickFunnels.

- 1. Click "Create a Zap" and enter ClickFunnels in the search box or, if you've already connected apps to Zapier, click on the app icon.
- 2. Choose the Trigger Event



In this case we selected the "New Successful Purchase" trigger because we want to trigger further events (New Registrant) every time when someone purchases a ticket for our webinar through ClickFunnels.

3. Connect your account



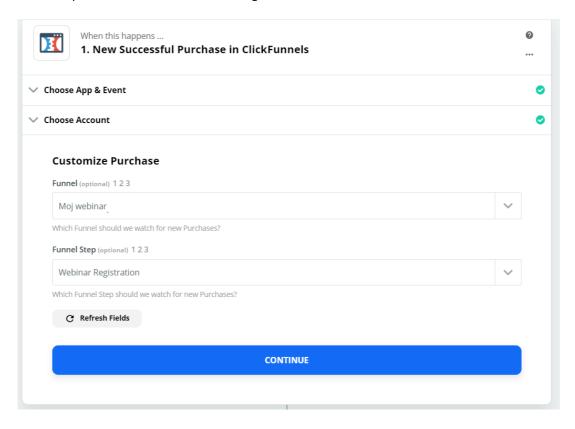
Choose a ClickFunnels account that is already connected to Zapier or click the "Sign in" button to add a new account. A pop-up will appear, prompting you to authorize Zapier to connect to the app. Allow Zapier to have access to your ClickFunnels account. Click "Authorize" and then "Continue".

4. Customize Purchase

This step is optional. If you skip it, every successful purchase in any of your funnels will trigger an action in LiveWebinar.

In this step you can also tell which Funnel should be watched for new purchases. Every successful purchase in the selected Funnel will cause an action in LiveWebinar. Next you have to decide if the trigger should concern every step of your funnel or not.

To choose the Funnel step click the dropdown list in "Funnel Step" field. In this case, a Funnel Step called "Webinar Registration" will add a New Registrant to existing a webinar. It means that every user who finishes the selected step will be added to the webinar registrants list.



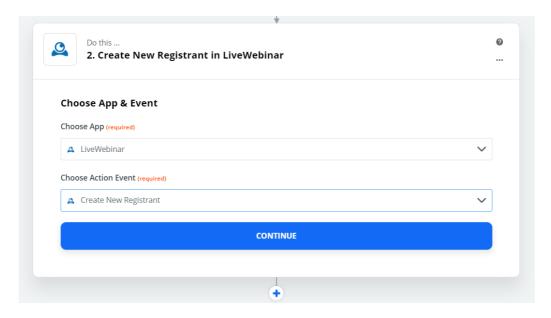
Now every completed Funnel Step called "Webinar Registration" will trigger an action in LiveWebinar. Click "Continue".

5. You can run a quick test if you want to make sure that your Zaps will work properly.

Click "Test" or "Test & Review" to allow Zapier test your connection by checking if finding a purchase in ClickFunnels is possible.

6. Select Action App

Type in the name of the app you want the action to be applied to. In this example, we'll use LiveWebinar because we want to create a new registrant in a scheduled webinar. This registrant will be the person who made a purchase in the previously selected funnel (in Step 4). In the Choose Action Event field select "Create New Registrant".

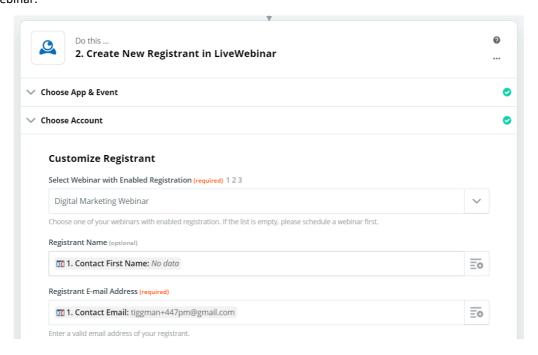


7. Connect account

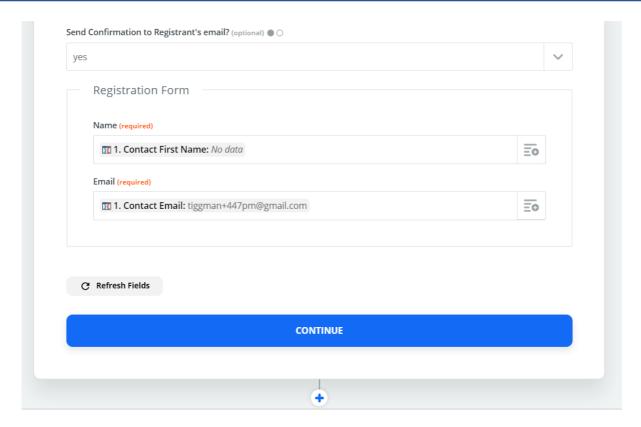
Choose a LiveWebinar account that is already connected to Zapier or click the "Sign in to" button to add a new account. A pop-up will appear, prompting you to authorize Zapier to connect to the app. Allow Zapier to have access to your LiveWebinar account. Click "Authorize" and then "Continue".

8. Customize Registrant

In this step, you can tell the Zap exactly what you want it to do with the data from the trigger app. Start from Selecting "Webinar with Enabled Registration" from the first drop down box. A list of active webinars should appear. In this step we selected "Digital Marketing Webinar" webinar, which we scheduled earlier in LiveWebinar.



In the next step you should select "Contact First Name" (optional) in the Registrant Name field and put "Contact Email" in the Registrant Email Address field. This way you will tell LiveWebinar from which ClickFunnels forms it should get data about the new registrant.



Then you have to decide if you want to send a confirmation to the registrant's email.

In the next step you should select "Contact First Name" in the "Name" field and "Contact Email" in the "Email" field. This way you specify which data will be sent to the LiveWebinar Registration Form. These fields may vary depending on registration form assigned to a particular webinar. This is why you should choose the data points from your trigger app that most closely match the field in your Action App.

9. Click continue and Test your Zap.

When you authorize all information from the trigger app which will be sent to the Action App, click the "Create **& Continue**" button to make sure this step works as intended.

10. Finally, click the "Done Editing" button.

Be sure to give your Zap a name by clicking the pencil in the top left corner of the editor. Then toggle the "On/Off" button at the bottom of the page to "On". Your Zap will run automatically from now on until you turn it off.

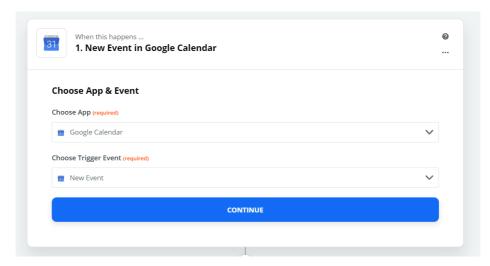
Zaps with "Create New Webinar" Action Event

First, we need to choose your trigger app, which will be causing an action in LiveWebinar. It could be an app which you use to schedule tasks, events or communicate with your team. It might be any service with dashboards, notes, calendars, and notifications like Trello, Evernote, Google Calendar, Slack. Almost every platform which schedules events, tasks, sends messages etc. In brief, this Zap can be created with software which you are using to organize your (webinar) business.

In this case we'll use Google Calendar. In the following example with every new event created in Google Calendar Zapier will schedule a New Webinar in LiveWebinar.

1. Click "Create a Zap" and enter Google Calendar in the search box or, if you've already connected apps to Zapier, click on the app icon.

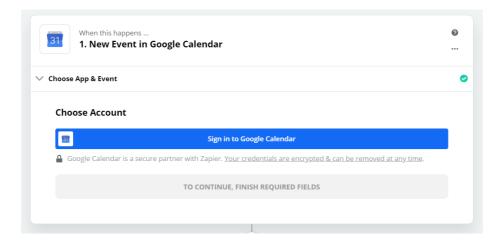
2. Choose the Trigger Event



In this case we select the "New Event" trigger because we want to trigger further events in LiveWebinar every time a new event is scheduled on your Google Calendar account.

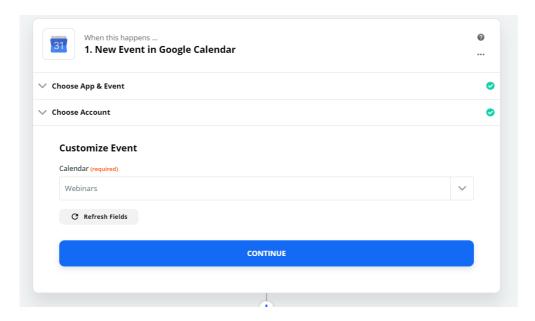
3. Connect account

Choose a Google Calendar account that is already connected to Zapier or click the "Sign in" button to add a new account. A pop-up will appear, prompting you to authorize Zapier to connect to the app. Allow Zapier to have access to your Google account. Click "Authorize" and then "Continue".



4. Customize Event

In this step you have to choose the Google Calendar in which scheduling events will create new webinars. It could be any of your Google Calendars. Click the dropdown list and select your calendar (we created a calendar earlier named "Webinars").

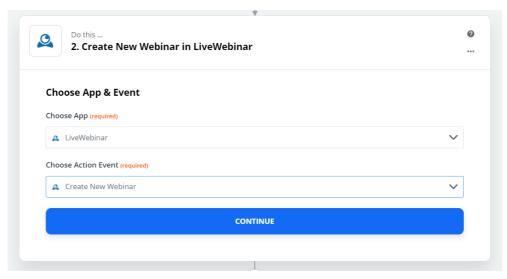


5. Test & Continue

Click "Test" or "Test & Review" to allow Zapier to test your connection by going out to see if finding an event in Google Calendar is possible.

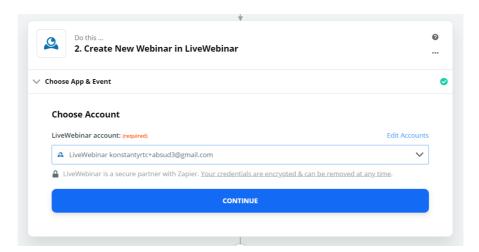
6. Select your Action App

Type in the name of the app you want the action to be applied to. In this example, we'll use LiveWebinar because we want to create a new webinar every time when new event in our Google Calendar is created. In the "Choose Action Event" field select "Create New Webinar".



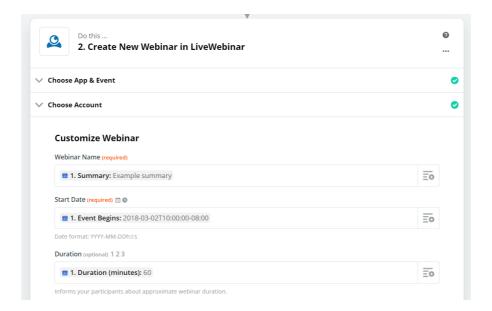
7. Choose account

Choose a LiveWebinar account that is already connected to Zapier or click the "Sign in" to button to add a new account. A pop-up will appear, prompting you to authorize Zapier to connect to the app. Allow Zapier to have access to your LiveWebinar account. Click "Authorize" and then "Continue".



8. Customize Webinar

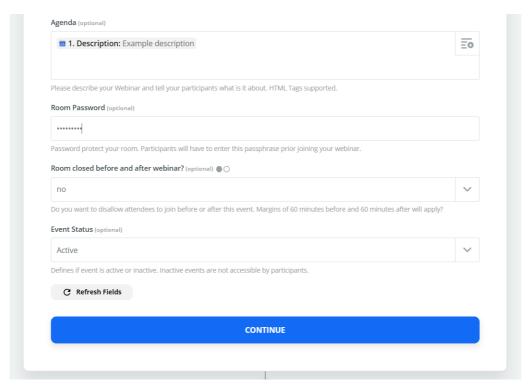
In this step you have tell the Zap exactly what you want it to do with the data from the trigger app by filling in the blank fields here. Start by selecting a name for the created webinar. Choose "Summary" from the dropdown box. Next you have to pick a start date for your webinar - select "Event Begins" in the Start Date field.



The duration field is optional. You can put any duration period here. However, if you want to decide how long your webinar lasts, from the Google Calendar side panel choose "Duration (minutes)" in the dropdown box.

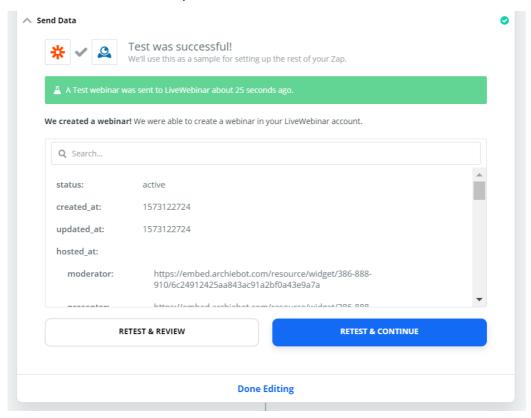
The other fields are optional, but by filling them you can decide if the created webinar will have the same agenda as the description of the created event. To do this please open dropdown box in the "Agenda" field and select "Description" as shown on the screenshot below.

It is also possible to password protect your webinar ("Room password" field) and decide if you want to prevent attendees from joining the before or after the event ("Room closed before and after the Webinar" field). Then you can set the status of every webinar created by this Zap ("Event Status" field). Decide if the trigger will create active or inactive webinars and click "Continue".



9. Click continue and test your Zap.

When you authorize all information from the trigger app which will be sent to the Action App, click the "Continue" button to make sure this step works as intended.



Finally, click the "Done Editing" button. Be sure to give your Zap a name by clicking the pencil in the top left corner of the editor. Then toggle the "On/Off" button at the bottom of the page to "On". Your Zap will run automatically from now, or until you turn it off.