Getting Your Nutrition & Virtual Funnel Started

SETTING UP ZAPIER CONNECTIONS

Checklist Number 5



STUDIO GROW

BUILD A BUSINESS AS FLEXIBLE AS YOU

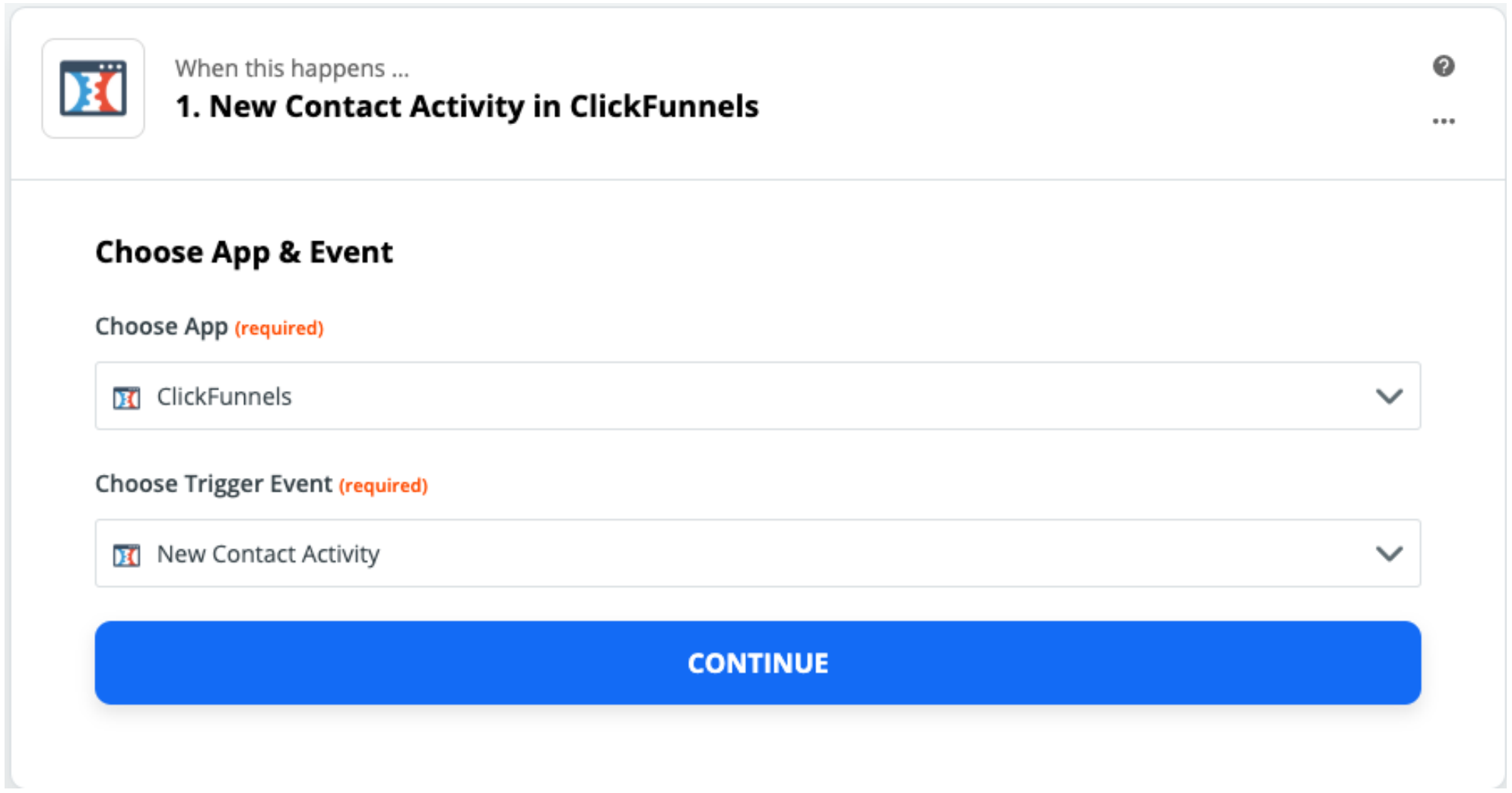
Connecting Zapier to ClickFunnels

WHAT IS ZAPIER: Zapier is an amazing tool that links two software together.

In order to keep track of your leads and sales, we are going to walk you through setting up several "Zaps." Whenever a Zap automates something, it's called a task. In this case, we are going to set up a Zap to automatically add a prospect's name and email address to your lead tracking sheet. Then we will set up a separate Zap to automatically add a purchaser's name and email address to your sales tracking sheet. Follow the steps below to get started:

ADD NEW LEAD TO GOOGLE SHEETS

1. Login to Zapier using your email address and password.
2. Click the black + icon on the top left of your screen
3. Zapier will ask you to choose an App & Event. Type in "ClickFunnels" and select the trigger event to "New Contact Activity."

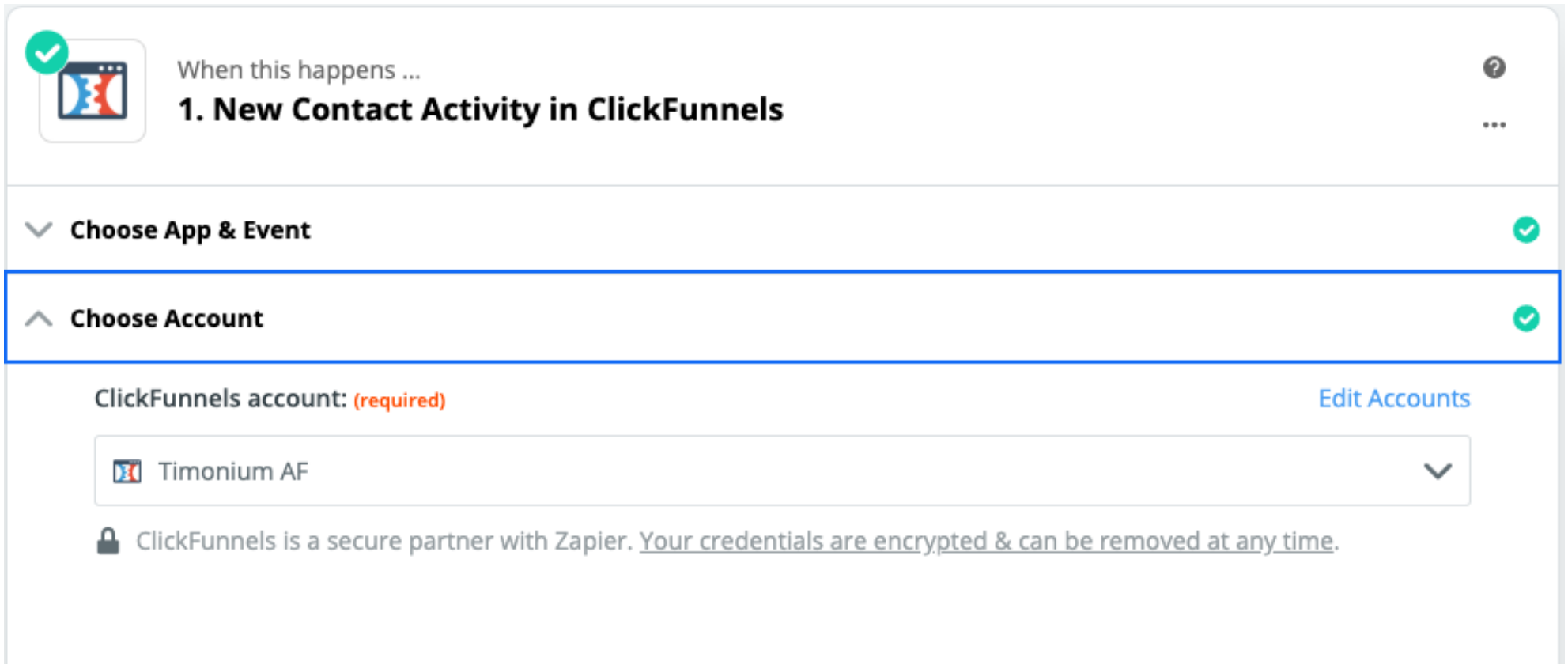


4. Click "Continue"
5. Click on "Sign in to ClickFunnels" and a pop-up box will appear for you to enter your login information.
6. After you connect ClickFunnels to Zapier, click Continue.

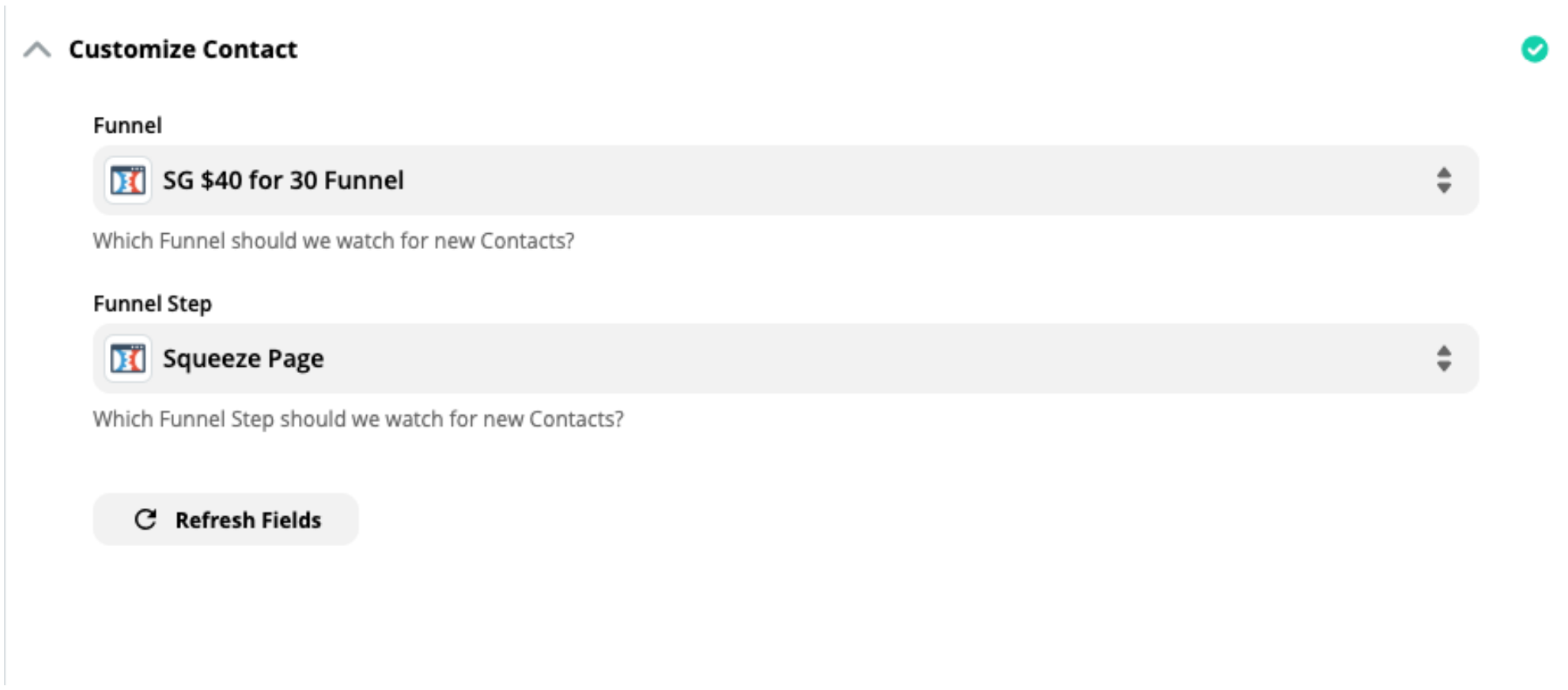
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Setting Up Zapier Connections

7. Your ClickFunnels account should automatically appear under Choose Account. If you have more than one account associated with your ClickFunnels login, you will have to choose the correct one.

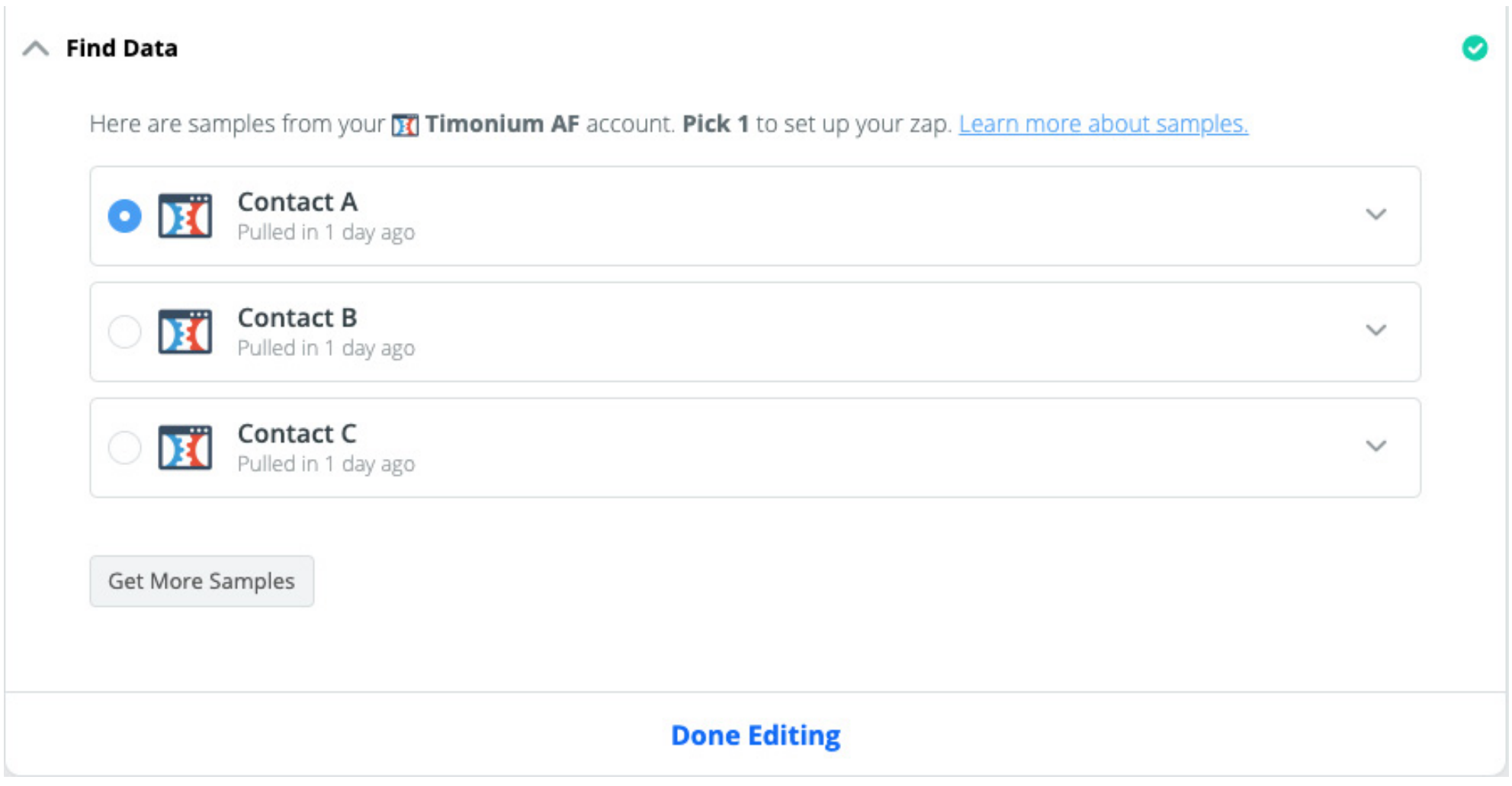


8. Click “Continue”
9. Select your funnel from the drop down.
10. Select “Squeeze Page” as the Funnel Step.

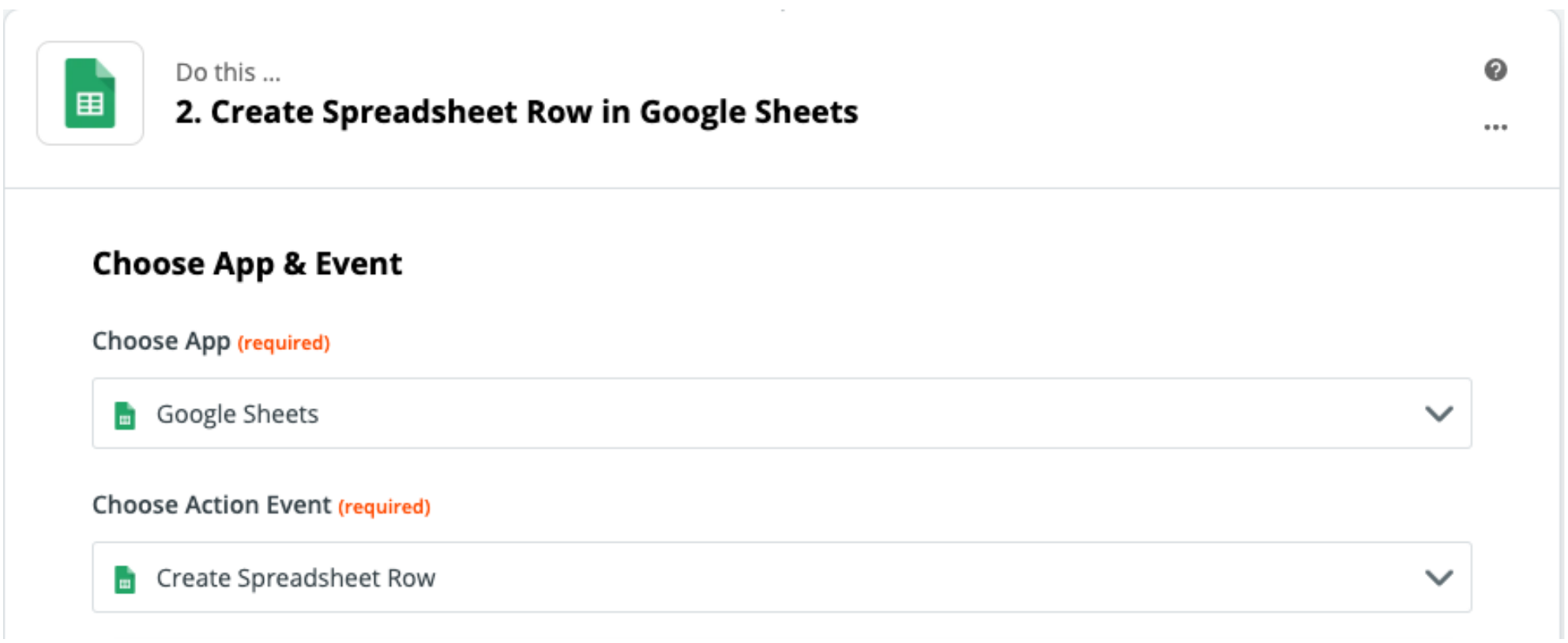


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11. Click “Continue”
12. Click “Collect Form Data”. NOTE: If you have updated the form in ClickFunnels, please submit a new test form in ClickFunnels, then recollect the data form. You can choose the newest form submission that has been collected.



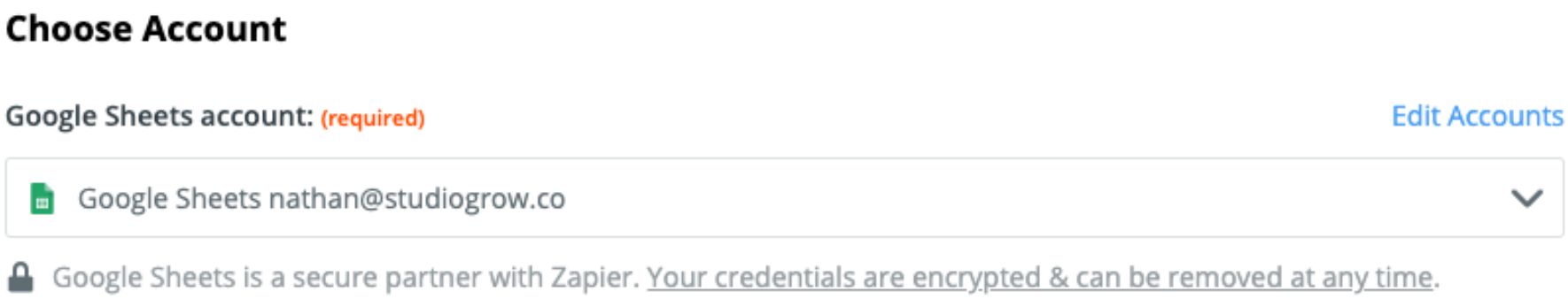
13. Click “Test and Continue”
14. On the “Do this...” screen, type in Google Sheets as the App and “Create Spreadsheet Row” as the Event.



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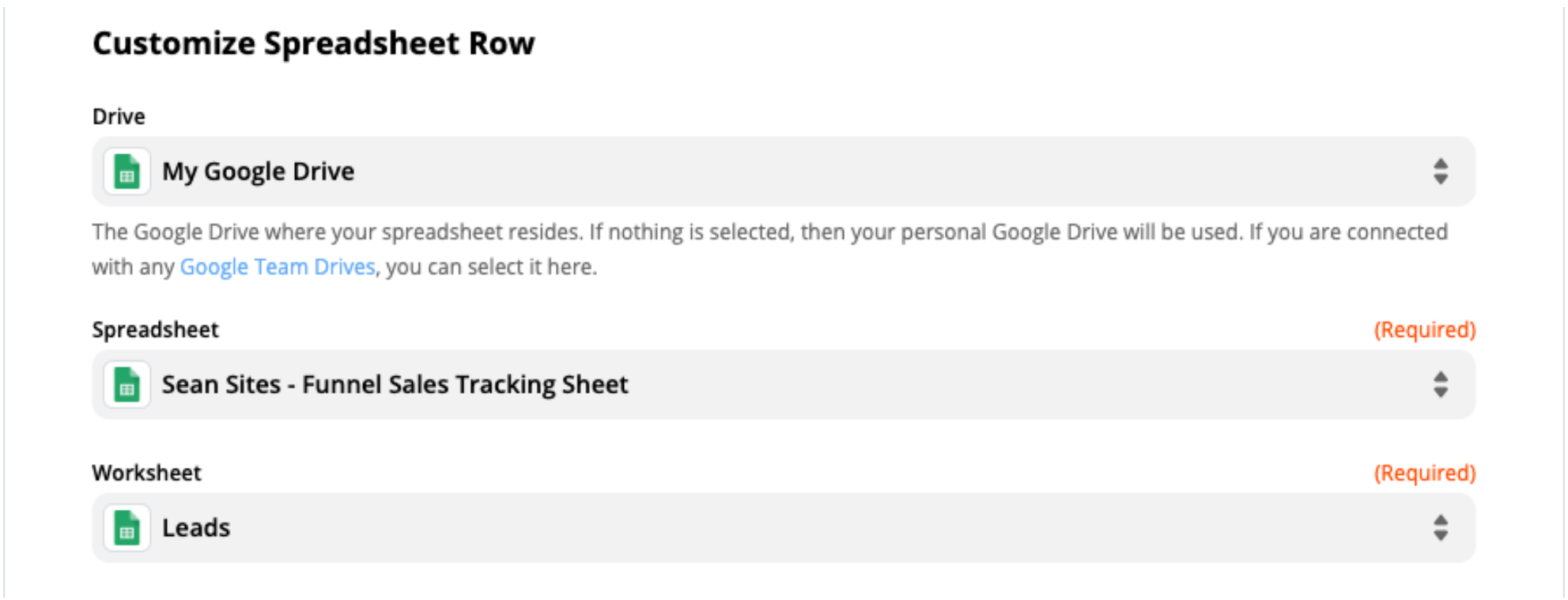
Setting Up Zapier Connections

15. Connect your Google Sheets account by Signing in to Google.





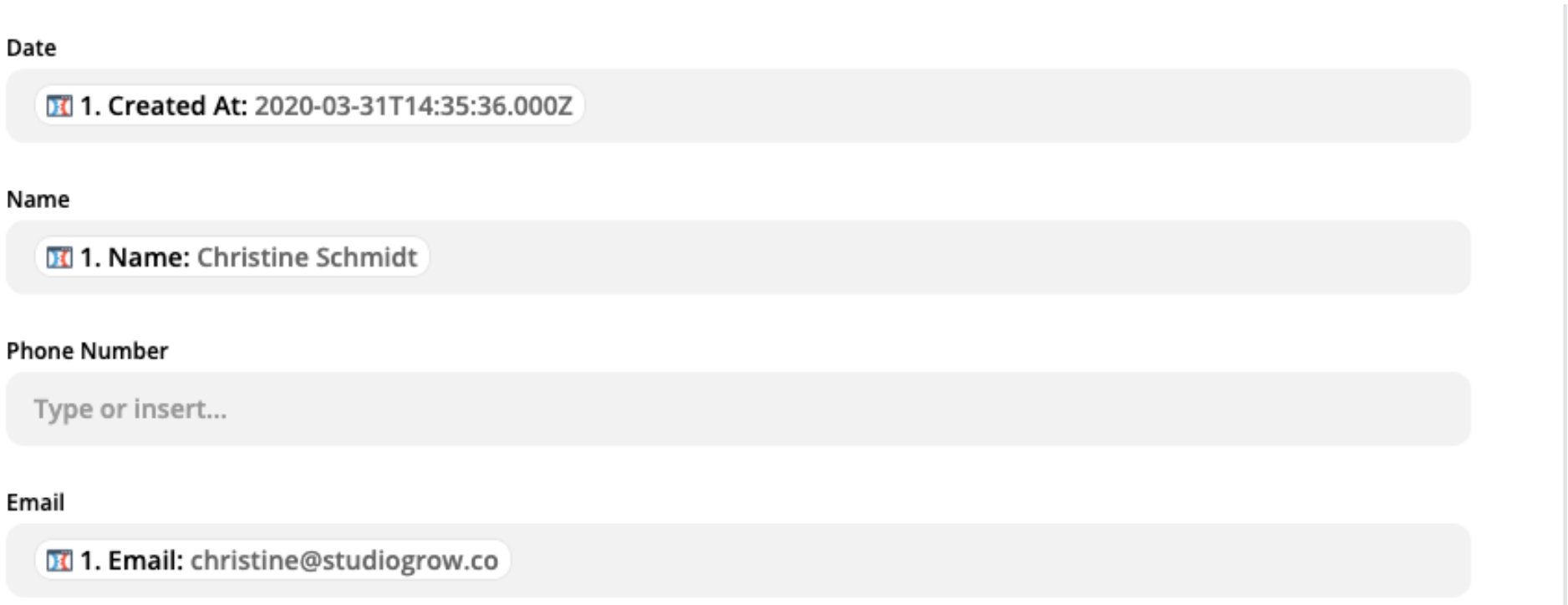
16. Select “My Google Drive” and search for the spreadsheet we shared with you.
17. Select the Worksheet as “Leads”



18. Some fields will automatically appear below. We will start to connect parts of the ClickFunnels form to the spreadsheet fields here.
19. Under “Date” type in “Created At” in the Search Field.
20. Under “Name” select the test Name from the drop down.
21. Under “Email” select test Email from the drop down.
22. Scroll down and click “Continue”

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Setting Up Zapier Connections

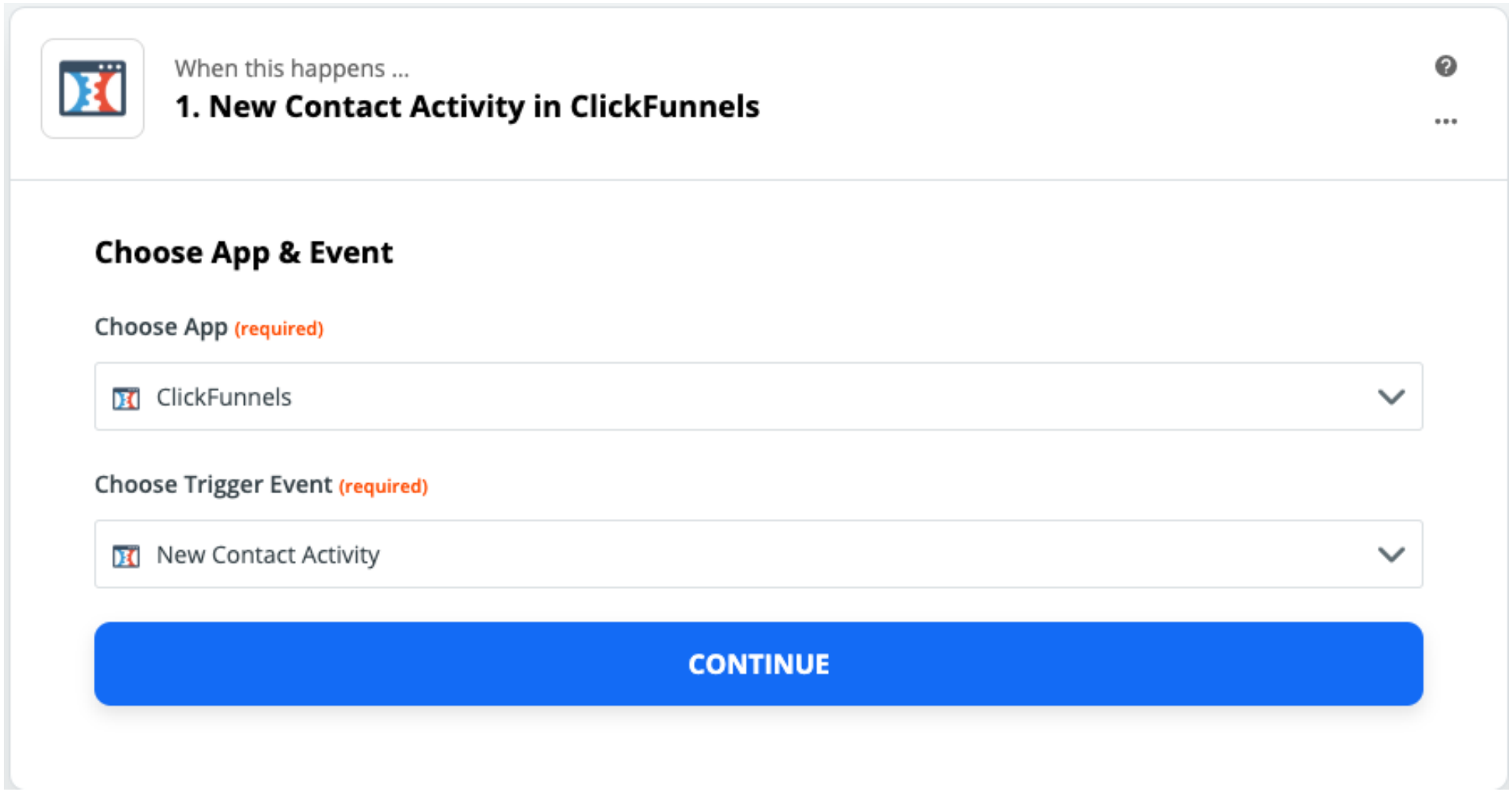


23. Click “Test & Review”
24. Go to your Google Spreadsheet and ensure that the data was added to your Leads sheet. If all looks good, click the toggle at the bottom of your screen to turn your Zap on.

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ADD NEW SALE TO GOOGLE SHEETS

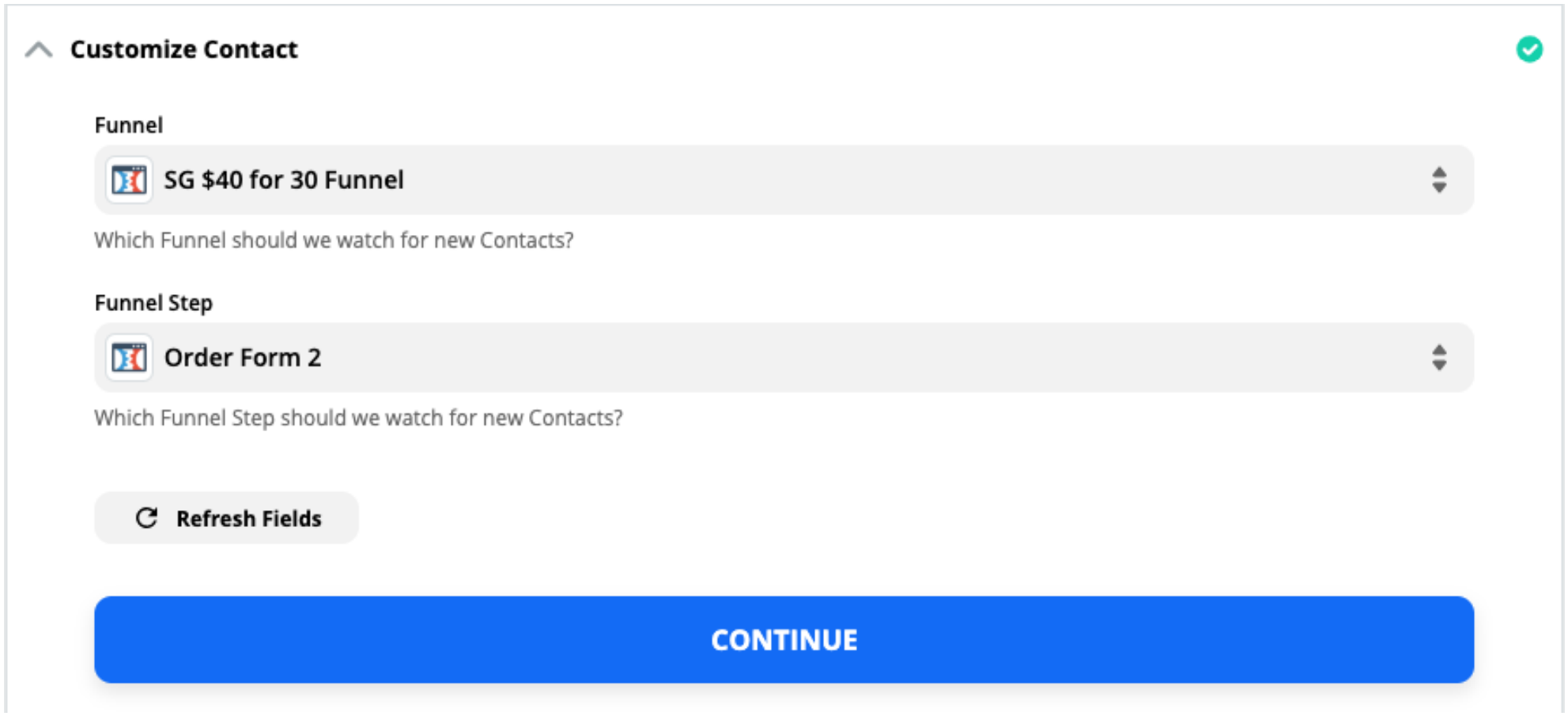
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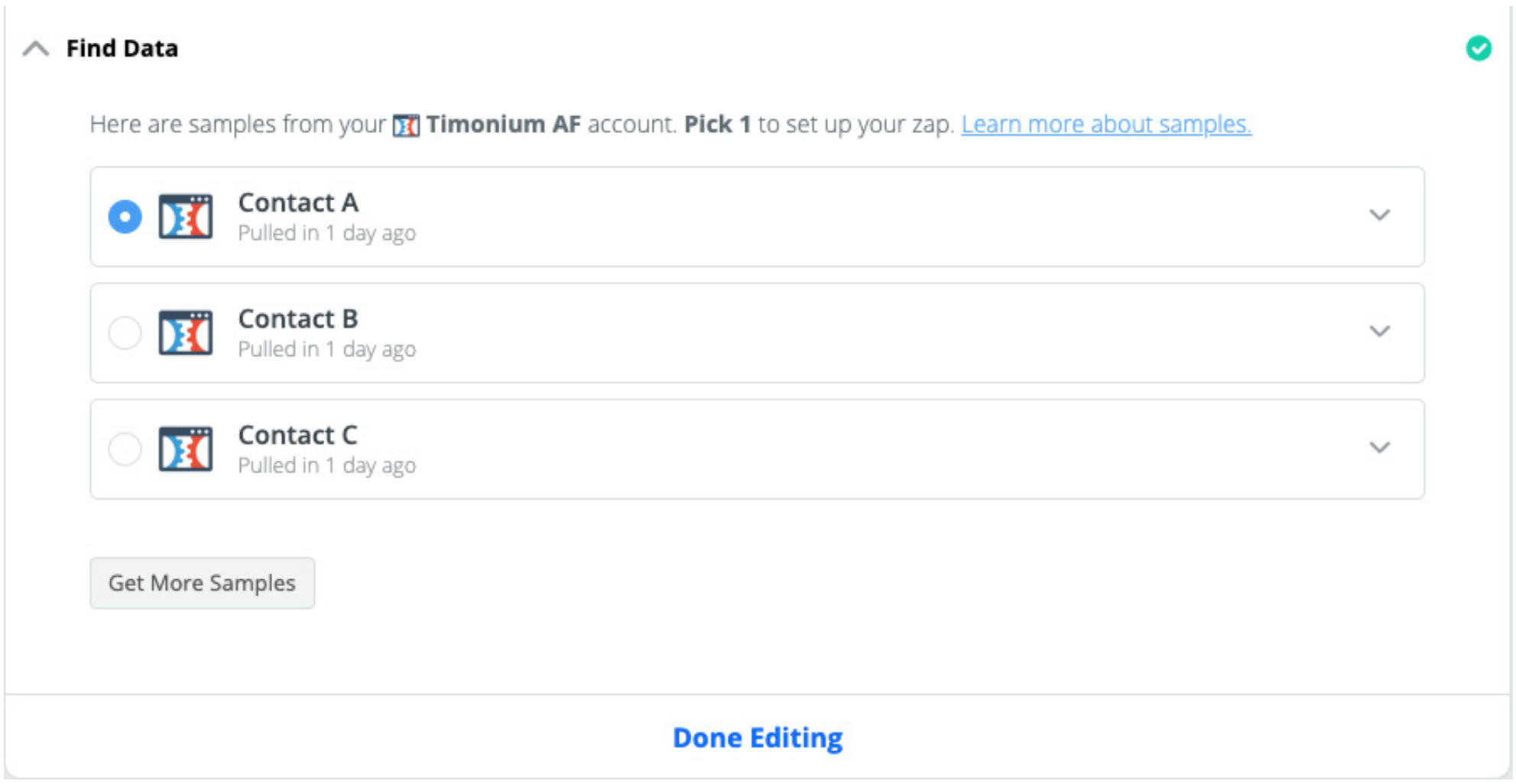
4. Click “Continue”
5. Click on “Sign in to ClickFunnels” and a pop-up box will appear for you to enter your login information.
6. After you connect ClickFunnels to Zapier, click Continue.
7. Your ClickFunnels account should automatically appear under Choose Account. If you have more than one account associated with your ClickFunnels login, you will have to choose the correct one.
8. Click “Continue”
9. Select your funnel from the drop down.
10. Select “Order Form” as the Funnel Step.

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Setting Up Zapier Connections

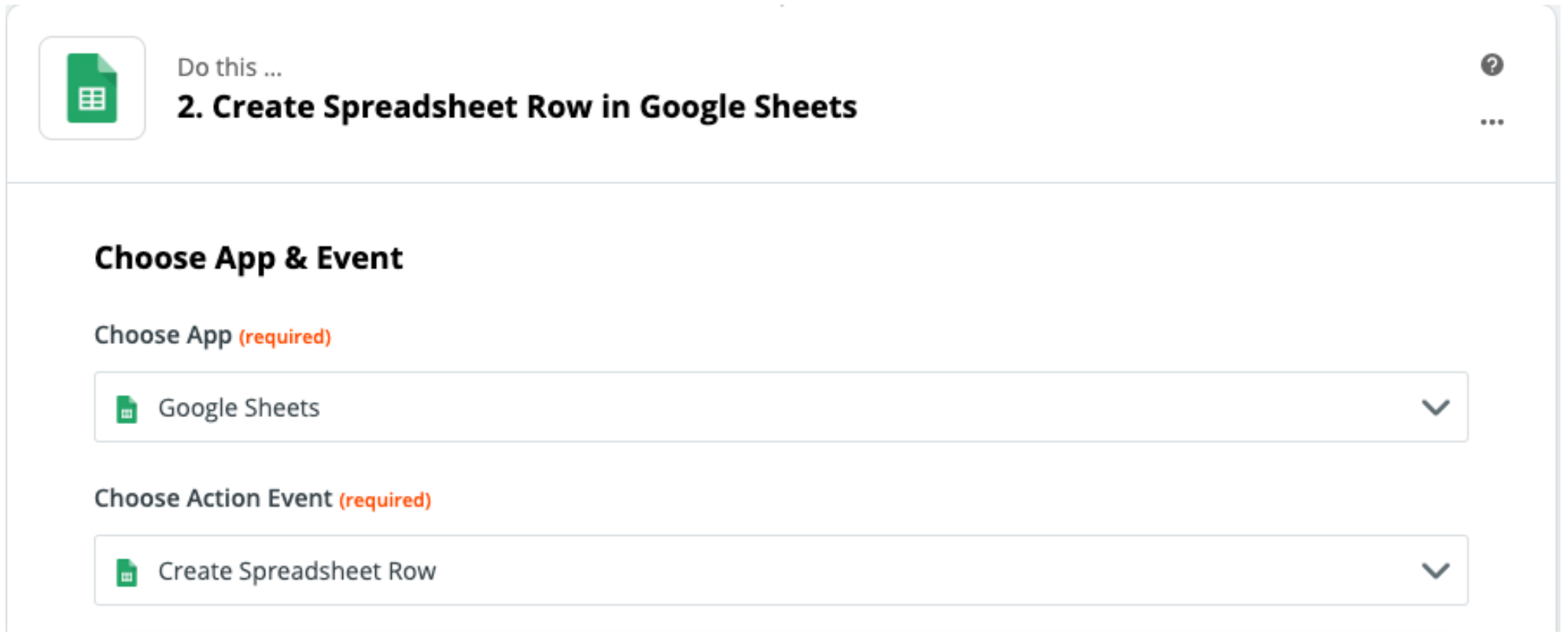


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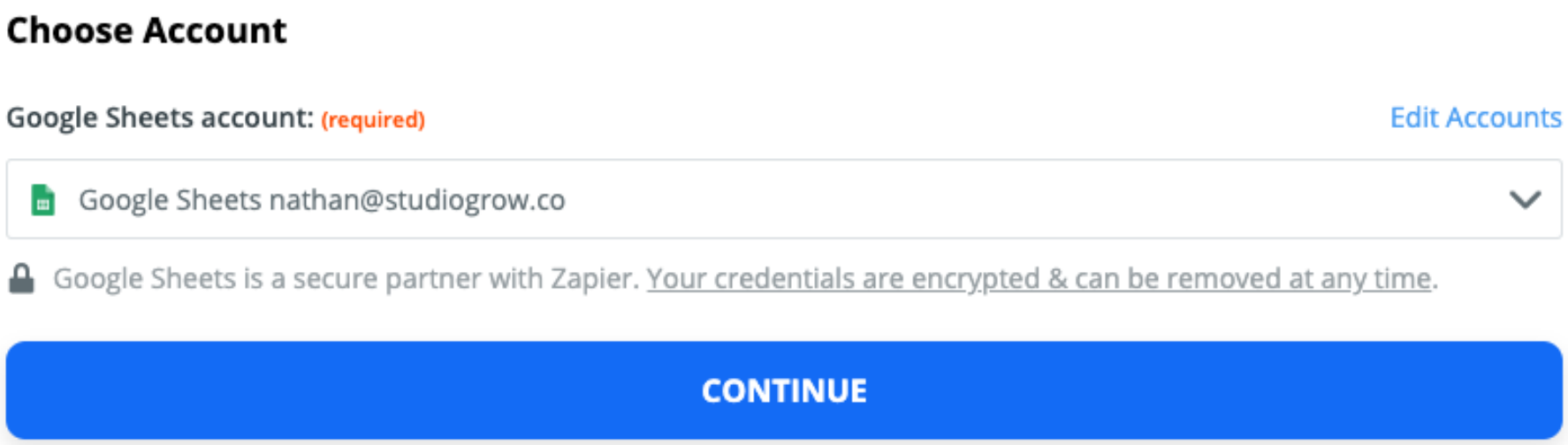


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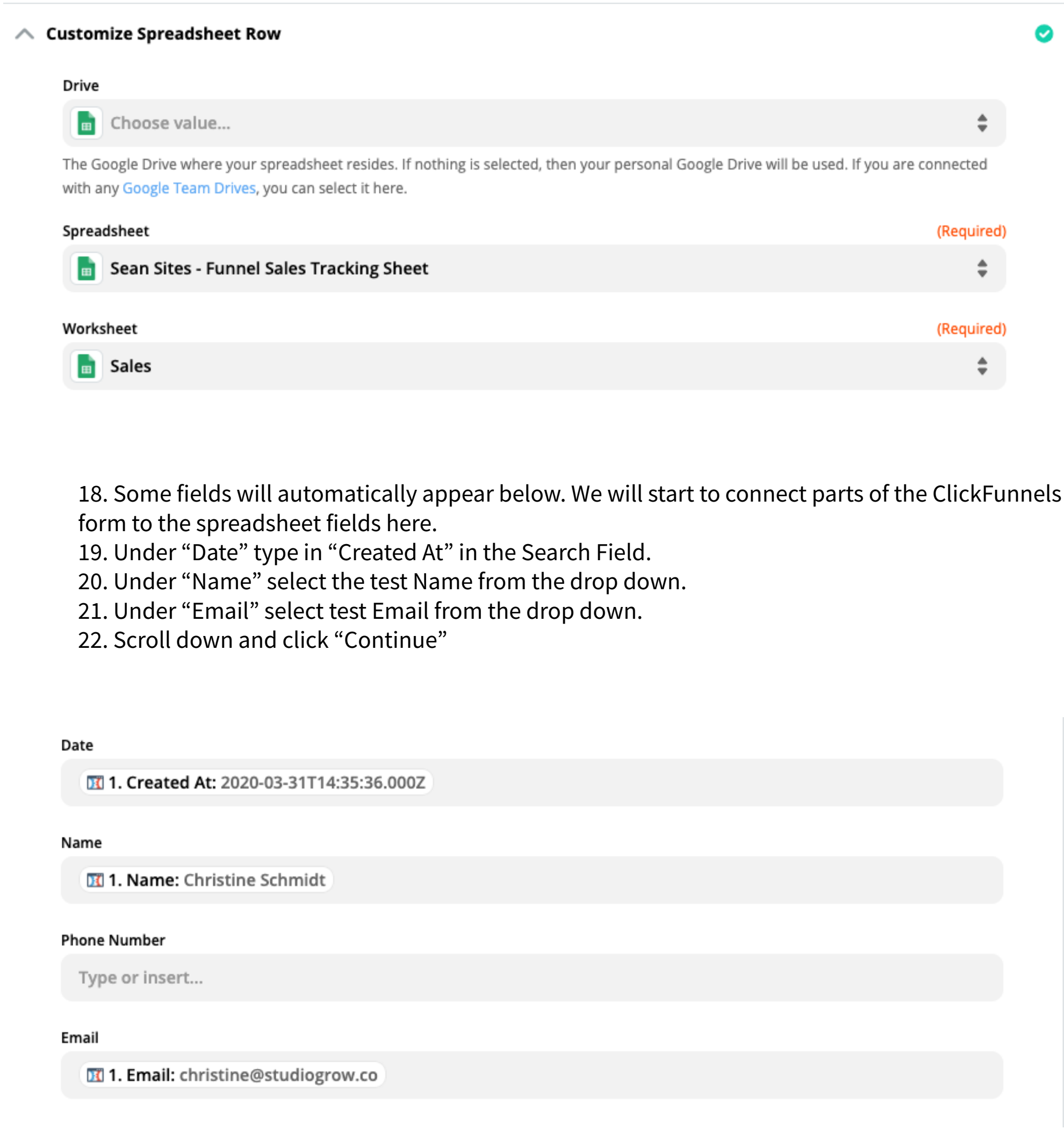
15. Connect your Google Sheets account by Signing in to Google.



16. Select “My Google Drive” and search for the spreadsheet we shared with you.
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Setting Up Zapier Connections



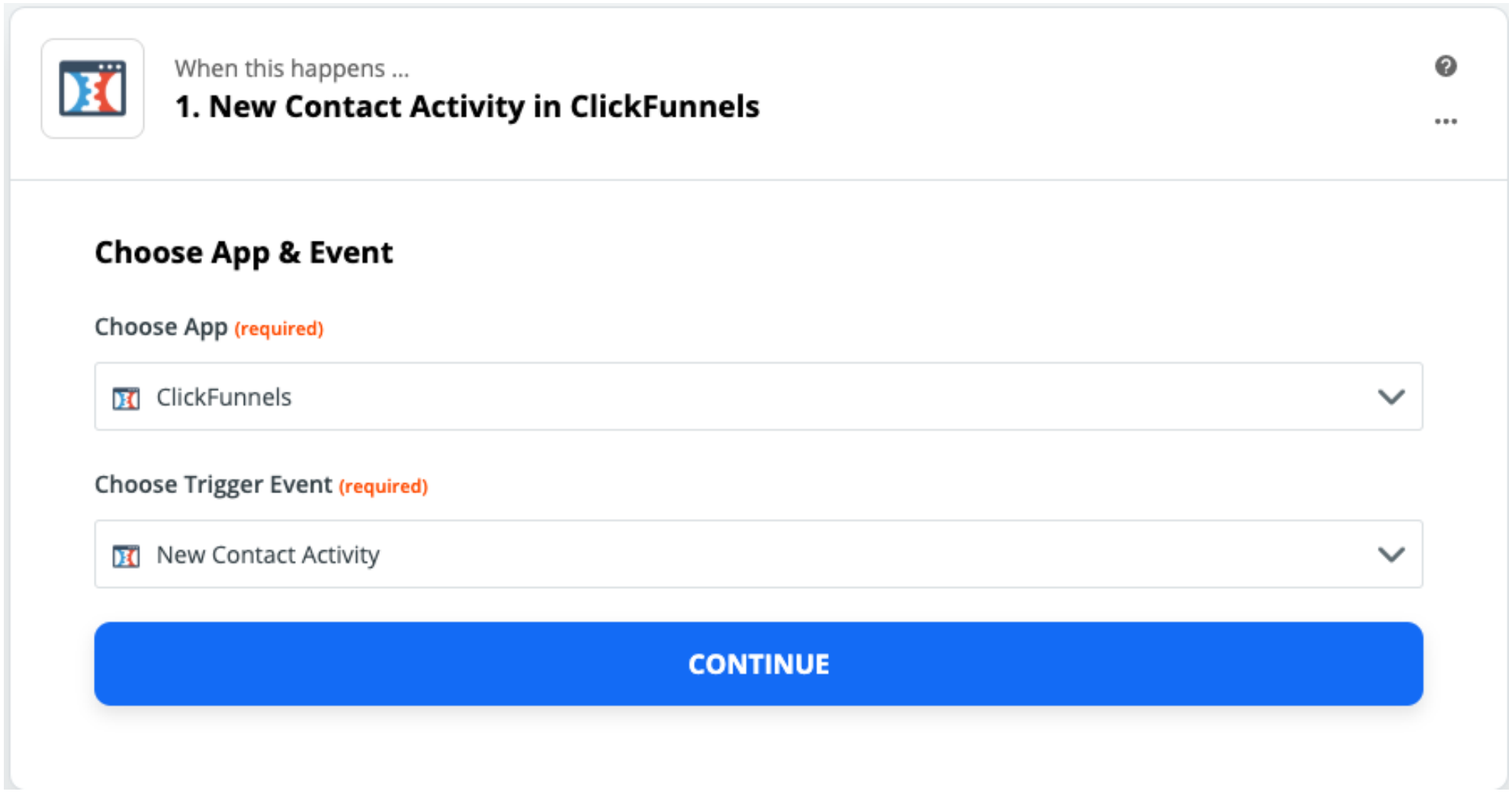
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EMAIL CLUB MANAGER WITH NEW SALE

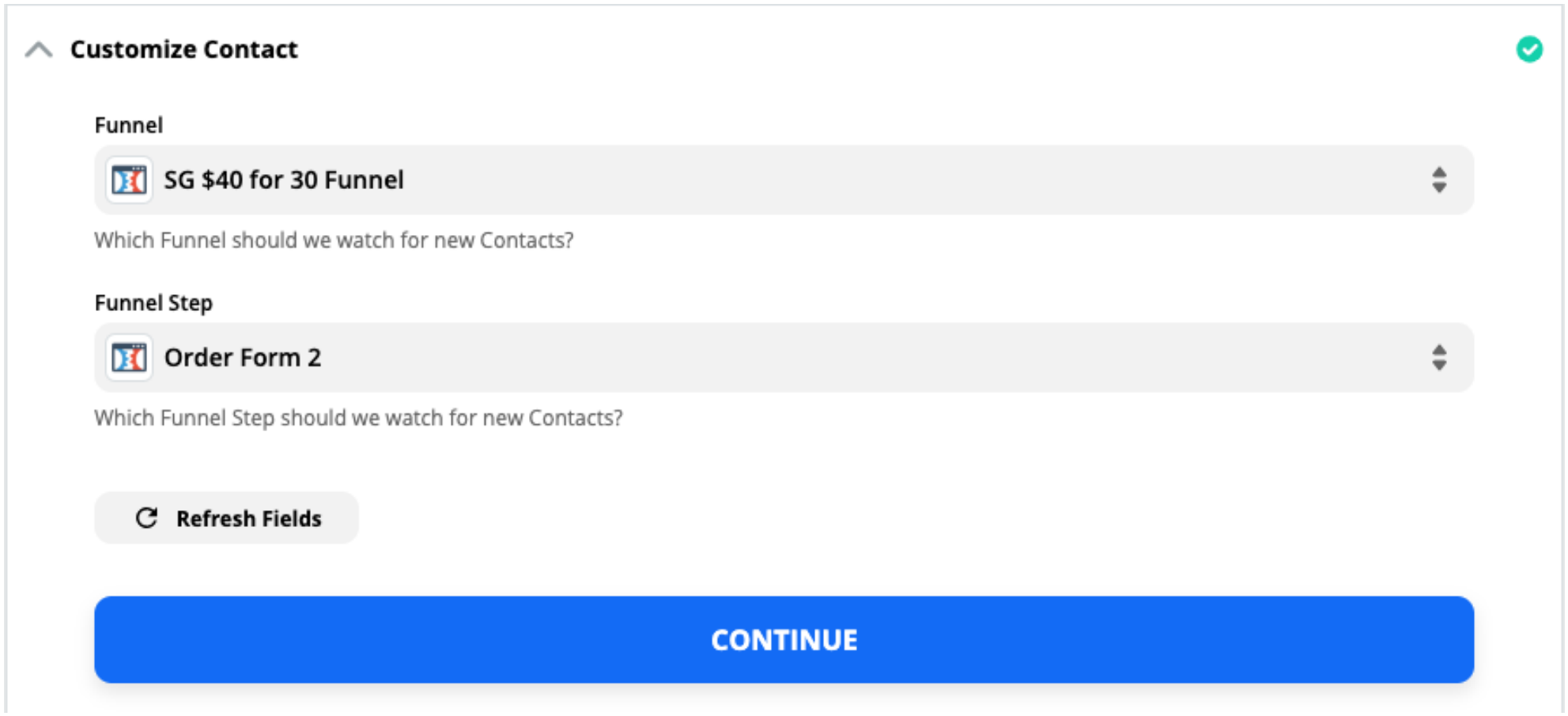
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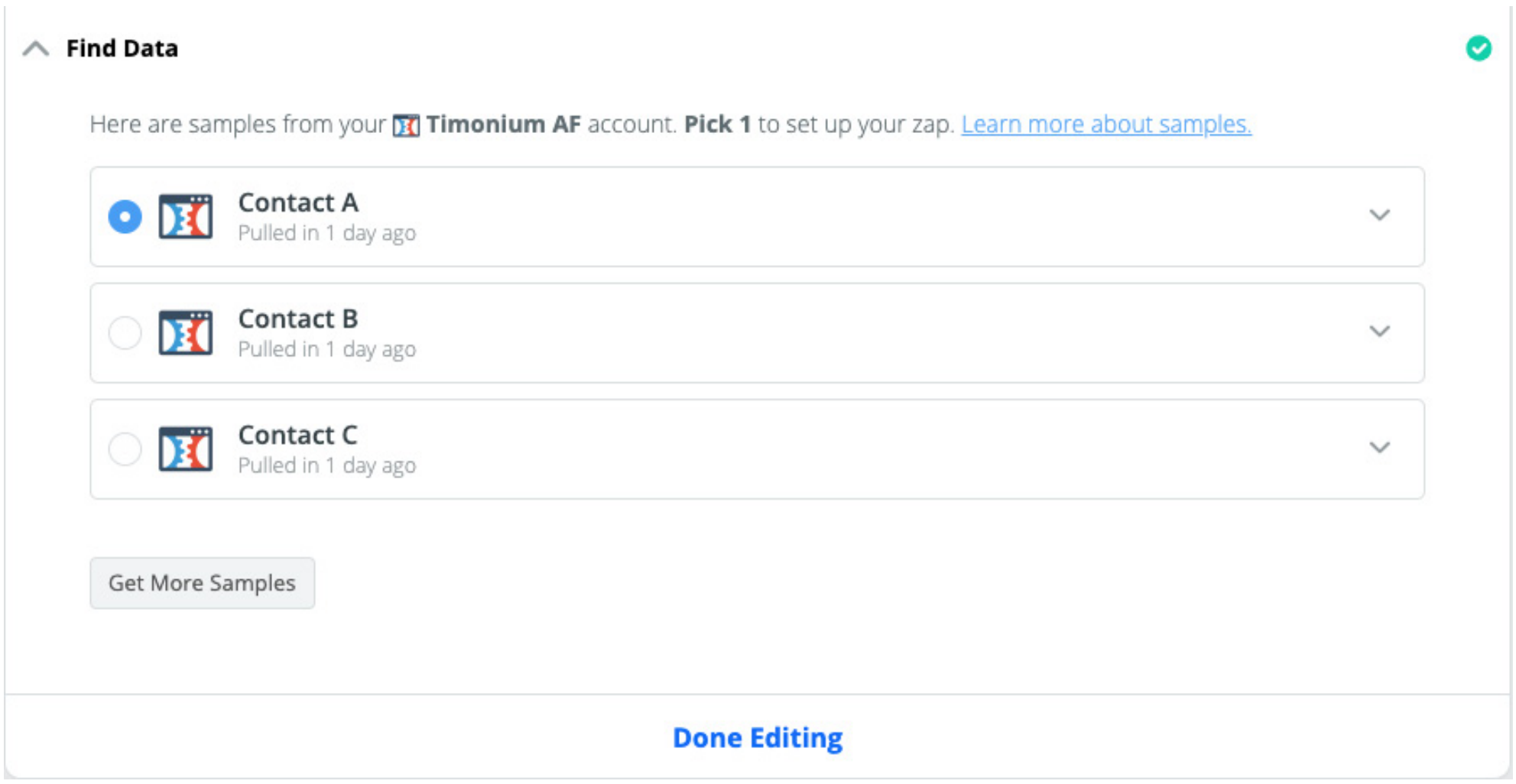
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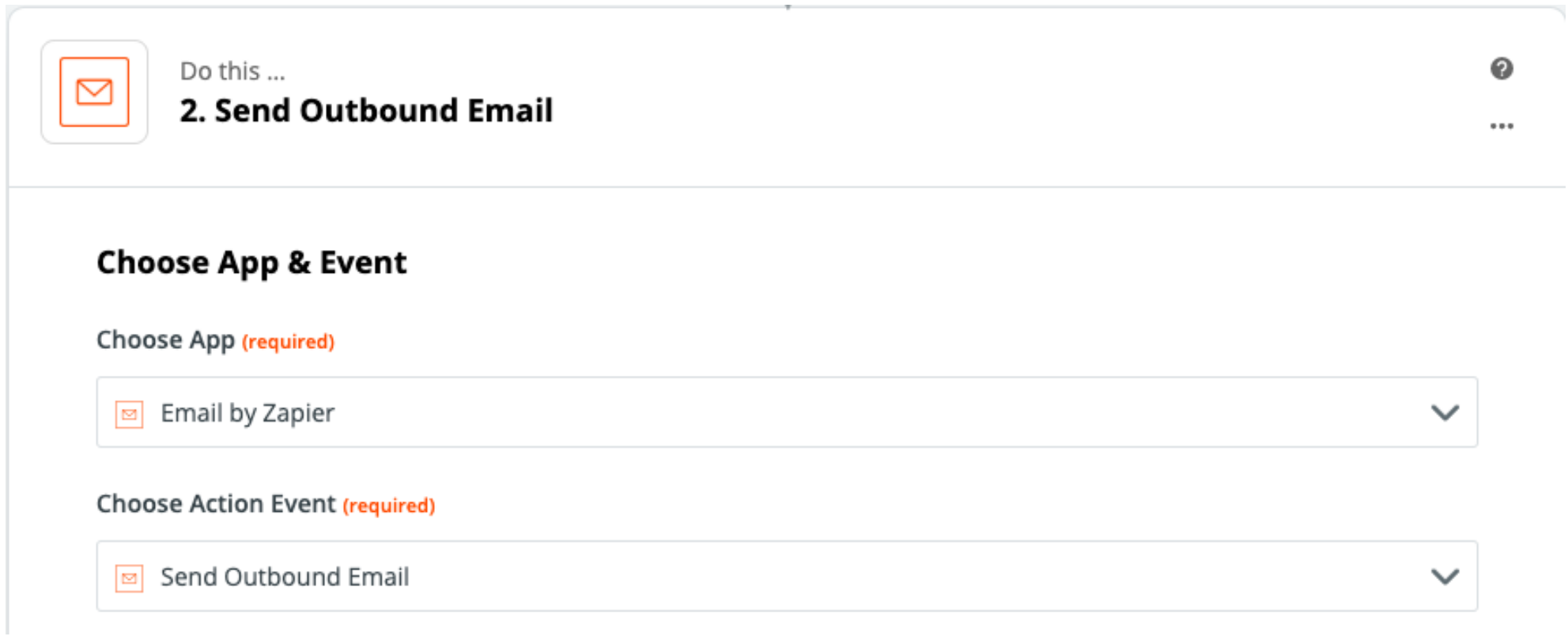


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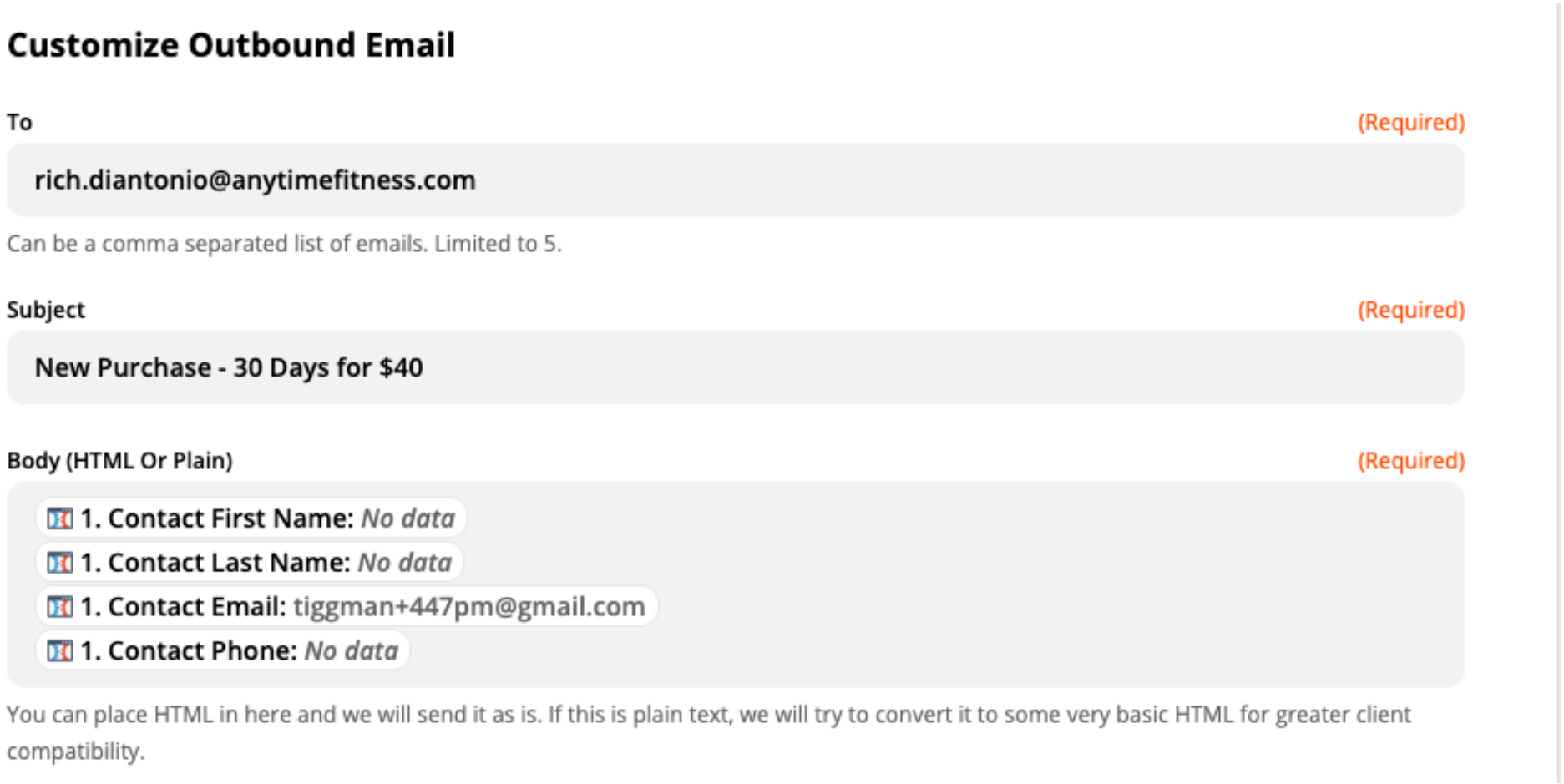


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13. Click “Test and Continue”
14. On the “Do this...” screen, type in “Email by Zapier” as the App and “Send Outbound Email” as the Event.



15. Customize your outbound email by typing in your club manager’s email in the To section.
16. Set the subject as “New Purchase - 30 Day Funnel”
17. Under “Body” select the ClickFunnel’s test data separately as” Contact First Name, Contact Last Name, Contact Email, Contact Phone”
18. Click “Continue” and Test and Review. Make sure that the email successfully sent to your club manager.
19. Toggle your Zap to “On” at the bottom of your screen.



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Questions?

support@studiogrow.co

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