

**Task Automation with Zapier, Python, and OpenAI**

**Course Number:** RPA-138
**Duration:** 5 days

**Overview**

Accelebrate's Zapier, Python, & OpenAI training course teaches attendees how to automate anything, boost productivity, and streamline workflows to free your team to focus on what matters most.

After taking a guided tour through Zapier's intuitive interface, attendees learn how to build "Zaps" that connect their favorite apps to automate everyday tasks, including automating data management, sending emails, posting on social media, and more. Students then learn the basics of Python scripting to customize Zapier actions for even more automation. In addition, participants learn how to leverage OpenAI's Generative AI within Zapier for tasks like generating creative content and extracting insights from data.

**Prerequisites**

All students should be comfortable writing Python scripts using basic data types, program structures, and the standard Python library.

**Materials**

All students receive comprehensive courseware covering all topics in the course. The instructor distributes courseware via GitHub. The courseware includes documentation and extensive code samples. Students practice the topics covered through challenging hands-on lab exercises.

**Software Needed on Each Student PC**

Students will need a free, personal GitHub account to access the courseware. All students will need a modern web browser such as Google Chrome. The instructor will provide Zapier accounts for the students. Student machines will need a text editor, such as VS Code, the latest LTS version of Node.js, and the latest Python version. Students will need permission to install NPM packages and PyPi packages. Preconfigured student virtual machines can provided upon request.

**Objectives**

* Master Zapier's user-friendly tools to automate countless tasks efficiently
* Understand how to use Zaps for connecting apps, tables for data management, and interfaces for capturing data
* Craft powerful Zaps to handle repetitive tasks like sending emails, updating spreadsheets, and publishing social media posts
* Expand automation power with Python scripting, customizing Zap actions for intricate workflows
* Build, test, and troubleshoot Zaps
* Store, organize, and retrieve data seamlessly within Zapier Tables for streamlined processes
* Design custom web pages with Zapier Interfaces to collect data from users effortlessly
* Integrate third-party services with Zapier to create powerful cross-platform automations
* Enhance automation with cutting-edge AI capabilities utilizing Zapier's built-in OpenAI integration
* Design and deploy custom, private integrations using advanced platform tools like the UI and CLI
* Integrate tailor-made Zapier integrations with your own custom Python applications
* Grasp the fundamental principles of Zapier integrations
* Use OpenAI's AI with custom Python Zaps
* Witness real-world examples of these powerful tools in action

**Outline**

* Introduction
* Task Automation
	+ What is Task Automation?
	+ What are Low-Code and No-Code solutions?
	+ Automate Tasks with Connected Web-based Services
* Zapier
	+ What is Zapier?
	+ How does Zapier Automate Tasks?
	+ Zapier Services
	+ Low-Code and No-Code Solutions with Zapier
	+ Manage Connected Apps
* Zapier Tables
	+ What is a Zapier Table?
	+ Pricing
	+ Manage Tables
	+ Define Table Columns
	+ Manage Table Data
	+ Export Table Data to CSV
	+ Filtering a Table
	+ Hiding Fields
* Zapier Interfaces Overview
	+ What are Zapier Interfaces?
	+ Pricing
	+ Manage Interfaces
	+ Configure an Interface
	+ Users and Limiting Access
	+ Themes, Branding, and Custom Domain
	+ Navigation
	+ Tracking with Google Analytics
* Create Zapier Interfaces
	+ Managing Pages
	+ Add Components to Pages
	+ Connect to Zaps
	+ Connect to Tables
	+ Debugging Issues
* Zaps
	+ What is a Zap?
	+ Pricing
	+ Using AI to Create Zaps
	+ Manage Zaps
	+ Organize Zap Folders
	+ Zap Metadata
	+ Zap Notes
* Zap Triggers
	+ What is a Trigger?
	+ Schedule Trigger
	+ Webhooks Trigger
	+ Tables Trigger
	+ Interfaces Trigger
	+ Third-Party Triggers
* Running Zaps
	+ Testing Actions
	+ View Run History
	+ Techniques for Debugging
	+ Debugging Python Code Actions
* Built-In Zap Actions (customizable; listed below are some possible options)
	+ Load Shared Values
	+ Incorporate Custom Python Code
	+ Paths to Conditionally Execute Branches of Actions
	+ Add/Update/Remove Data from Tables
	+ Filter Data to Control Task Execution
	+ Format Incoming Data
	+ Delay Task
	+ Send Emails
	+ Other Zapier Actions
* Generative AI Chatbots
	+ What are AI Chatbots?
	+ Pricing
	+ Configure Chatbots
	+ Define Directives to Control AI Interaction
	+ Include your data to improve the AI Chatbot
	+ Run Zaps from the AI Chatbot
	+ Customize the Appearance
* Real World Examples
	+ Lead Generation
	+ Customized AI-Powered Chatbots
	+ Incident Report
* Integrate with Third Party Apps (customizable, some possible options are listed below)
	+ GitHub
	+ MoonClerk
	+ TypeForm
	+ SendGrid
	+ Slack
	+ Monday
	+ Azure
	+ Azure DevOps
	+ Other Third Party Apps
* Custom Zapier Integrations with Python
	+ What is a Custom Integration?
	+ Three Core Concepts: Authentication, Trigger, and Actions
	+ Public vs. Private Integration
	+ Platform UI vs Platform CLI
	+ Zapier Platform V3
	+ Must-Have Triggers and Actions
	+ Platform UI Demo
* Zapier Integration Structure
	+ Dashboard
	+ Build
	+ Manage
	+ Embed (Public Integrations Only)
* Zapier Platform CLI
	+ Install the Zapier Platform CLI
	+ Create a New Integration
	+ Test the Integration
	+ Deploy the Integration
	+ Publish the Integration
	+ Use JavaScript to define the App Integration
	+ Call a Python API from the App Integration
* Conclusion