Creating your first Zap
Connecting Notud to Slack

Notud has partnered with zapier
So what exactly can it do?

Zapier has the flexibility to extend the power of Notud by simply automating tasks between multiple online services.

Become your organisation's automation expert within minutes without needing to use or understand code.
To connect Notud with a platform like Hubspot, Zapier requires a *'trigger'* in one service that will cause *'actions'* to occur in another service. These functions, among hundreds of other automated tasks, are called *'Zaps'*.
This step-by-step guide will show you how to connect and share a contact note from Notud automatically into your group Slack Channel.

Notud with Slack Example

Slack example

Create workflows called Zaps

Zaps allow Notud to connect with multiple programs you use daily to perform automated repetative tasks, so you can focus on other work.

Don't loose track of your contact notes and send them where they need to be.

Trigger
When you create a contact note within your team

Action
Title and save the meeting note in Notud

Action
Automatically send the Note URL with a message directly into your group Slack channel

Slack your team's channel with a meeting notes they can access immediatly! Become the most productive your team has ever been.

How to get started zapier

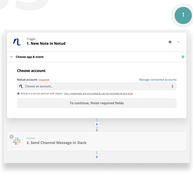
We first require you to create a Zapier account using the following steps...

Click to the shortcut:
Zapier Shortcut

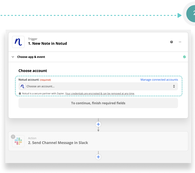
Sign up for FREE or log into your account

Confirm account and head back to Zapier

Entering your Notud details

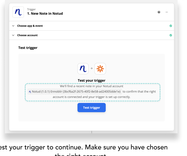


Name your Zap "Contact Notes to Slack Channel"



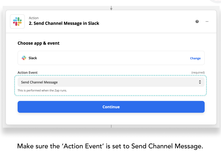
Choose your organisation's account by signing.

Make sure the details are correct and continue.

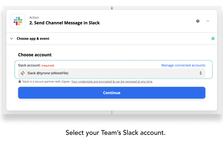


Test your trigger to continue. Make sure you have chosen the right account.

Entering your Slack details

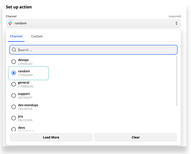


Make sure the 'Action Event' is set to Send Channel Message.



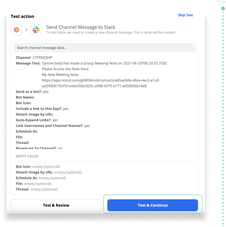
Select your Team's Slack account.

Next, enter your 'Message Text' - this is the message Zapier will send the channel when a note is created. For **Best Practice** include the note name, URL and Contact name.

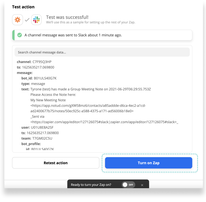


Begin with selecting the Slack Channel you wish the information to go into.

Once the information is populated, scroll to the bottom and press continue.



Press test and continue. Your slack channel will receive a notification instantly. This is testing the Zap works.



Lastly, turn on the Zap so this process is automated.

Congratulations!
You have sucessfully completed your setup