

How to Trigger Email Alerts with Zapier

What does Zapier do? Zapier allows you to automate tasks with 'Zaps' that trigger actions so different web services can integrate with each other.

Example: Send an email alerts to one or more recipient based on filters.

[Use [this invite](#) to Zapier.]

You will need a paid plan on codeREADr.com to get your API key. If you're not ready for a codeREADr paid plan, please contact support@codeREADr.com to request a demo account.

A. Create a codeREADr Service and Export Template

1. If you haven't done this already, set up the Service on codeREADr.com based on the data you decided to collect. You can find instructions [here](#).
2. Create an Export Template on the Scans page to create an Export Template. General instructions can be found [here](#). The Export Template is optional but it will help you format the email body.
3. **Important:** If you are going to filter by the app user's answer to a prompt (a 'Question'), when creating or editing the Service set the prompt to be asked **before submitting** the scan. [Contact support @ codeREADr.com.]

B. Create a Trigger

1. Go to Zapier.com and sign up for a Free (or paid) Plan.
2. Once logged in, click the 'Make a Zap!' link at the top.
3. You'll see 'Choose a Trigger app' >> select 'codeREADr'.
4. For the codeREADr trigger select 'New Postback Receiver Scan' and click 'Save + Continue'.
5. Select the codeREADr account to use. If you haven't already connected a codeREADr account, click 'Connect a New Account'.

a) Here you need to paste your codeREADr API key in the form field. To obtain your API key, go [here](#) on codeREADr.com in a **new** browser window. Keep that window open.

API Key

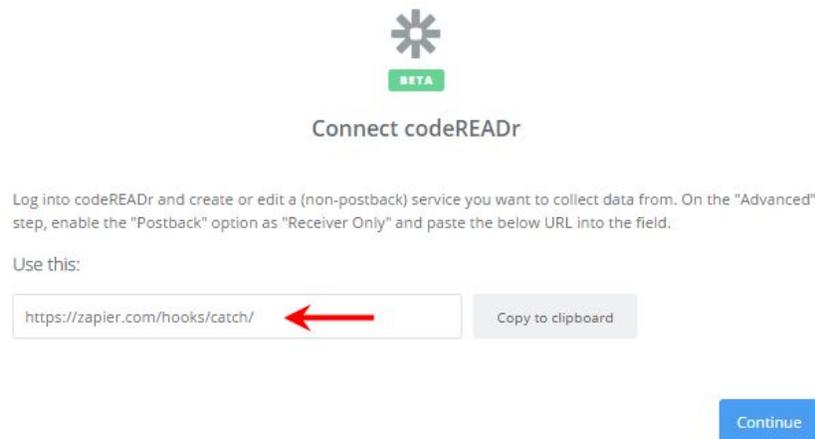
Use this to take advantage of our Developer APIs. Changing your API key will invalidate all your share links.

91c91 [REDACTED] 921595fd2 Generate New API Key Manage API IP Whitelist

b) Copy your codeREADr API key and navigate back to the Zapier webpage to paste it in the form field, then 'Save + Continue'. [Note: Keep the codeREADr webpage open as we will come back to it later.]

c) Name your connected codeREADr account and click 'test' to confirm the connection is successful.

6. To connect your codeREADr Service to this Zap, copy the link under 'Use this' by clicking the copy to clipboard button. Then click Continue.



Log into codeREADr and create or edit a (non-postback) service you want to collect data from. On the "Advanced" step, enable the "Postback" option as "Receiver Only" and paste the below URL into the field.

Use this:

[Copy to clipboard](#)

[Continue](#)

7. On codeREADr.com open the trigger Service to the Advanced step and paste that web hook in the Postback form field, choose Receiver Only, select the Export Template you created and then click Save.



Miscellaneous:

- Postback scans after they are received by the server.
- Postback each online scan made directly to the server.
- Postback each on-device scan uploaded to the server.

Receiver Only Full Postback

Enter your Postback URL:

Paste Webhook here

For advanced users - requires IT integration. ([Learn more here.](#))

Choose a template for your POST variables:

8. Back on Zapier select the codeREADr Service you want to connect and then test it.



BETA

Set up codeREADr Postback Receiver Scan

* **Service ID (required)**
Select the service to watch for new scans. This codeREADr service must have the zapier webhook provided above as its receiver only postback url.

Dropdown menu of available Services from your connected account

* **User ID (optional) 1 2 3**
Optionally filter scans to trigger only when a new scan is made by selected user.

Optional

C. Create a Filter

1. To add a Filter or Action click the '+' on the left column. Choose 'Filter' (a built-in Zapier feature) and on the next step Select Filter check the box for 'Only continue if ...'.

Choose an App

Search hundreds of apps...

YOUR APPS

 Filter	 Basecamp 2	 Excel	 Gmail
 Google Drive	 Google Sheets	 QuickBase	 Salesforce

show all

2. Choose connected codeREADr service field to filter, the filters to use and then test it.

Set up Filter by Zapier Only continue if...

Only continue if... (required)

1 - Zapier Email Alert 1 (Text) Contains Fail - Sends Alert

+ AND

+ OR

Select the field from the connected codeREADr Service

Select the Filter type

Select the Filter

Continue

D. Connect codeREADr to Gmail

1. For 'Choose an Action App' >> select 'Gmail'.
2. For 'Select Gmail Action' >> select 'Send Email'.
3. For 'Select Gmail Account' >> select your account if listed or add it here.
4. For 'Set up Gmail Email' >>
 - a. Enter the email conditions (To, CC, etc.).
 - b. For 'Body' use the menus on the right to select what you want to include in the email. In this example the email is to issue an alert when a certain condition is met so who did the scanning and when would likely be important to add to the email body. Notice the very simple HTML used to format the text.

Body (required)

```
<html>
<h1> Step 1 Zapier Email Alert 1 </h1>
<h3> Step 1 User Name </h3>
<h3> Step 1 Timestamp (Scanned) </h3>
</body>
</html>
```

Filtered field

App user who made the scan record

When the scan was made

Select

5. Before you run the test, have the codeREADr app open to the connected Service and your Gmail account open to receive the filtered email. Test scans that have and don't have the filtered content to make sure it works properly. You can go back and edit the email Body until you are satisfied with the result.

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