# Zapier Trigger for Alerts Sent to Email or SMS

**1. You first need to set up the codeREADr Service and the Trigger App (in this case, codeREADr).**

a) [Create a service](#) using your codeREADr.com account.
   i) You have no restrictions when creating your services. They can be a record-scans or validate scans service type, online or offline, with ot without app-user prompts ('Questions').
   ii) The key consideration is what you want to trigger the alerts. You have many options, including the barcode value, response text, status (e.g. an invalid scan), service name, app username or an answer to a prompt.

   For the example below we used a specific answer to an app-user prompt to trigger the alert - in this case the filter is the word 'Fail'. Think of a security guard doing their rounds. Let's say they find a door unlocked, a fire extinguisher discharged, a temperature too high or some other parameter exceeding standard limits. If the guard scans the asset's barcode and when prompted to disposition the asset, if they choose the multiple choice option 'Fail' then that will trigger the alert to be sent.

b) After you have your service created, follow the instructions to [Create the Trigger](#) using a Zapier Webhook. When you've completed a) and b) you are ready for creating the Action.

## 2. Now connect the Action App using a standard Zapier Action.

Under 'Apps' on Zapier.com search for 'Zapier' and you will see these Actions:

a) 'Filter by Zapier' allows you to define what will actually trigger the alert.

b) 'SMS by Zapier' allows you to define who get the alert and with what text in the message. You can have a simple message or your can include some contextual information. With SMS there's a limited # of characters (153).

c) 'Email by Zapier' isn't limited so you can add more contextual information within the alert. For example:



d) IMPORTANT: It matters when you prompt the app-user. The most common prompt is presented "after submitting a valid scan" but you can choose what best suits your needs. The key is to have all prompts be either before or after submission, not some before and some after unless you don't need all the answers in SMS or emailed body.

## 3. Overview of the Action setup for SMS with a simple message:

✎ SMS alert

Add a note
╋

FILTER
✅
▽  2. Only continue if...  ⌄

▽  Filter by Zapier
⚡  Only continue if...
☰  **Filter Setup & Testing**

✎  Rename Step
✖  Delete

╋

ACTION
ᗷᴑ
3. Send SMS  ⌄

ᗷᴑ  SMS by Zapier
⚡  Send SMS
👤  SMS
☰  **Edit Template**
🧪  Test this Step

✎  Rename Step
✖  Delete

▽  **Filter Setup & Testing**
Choose the condition(s) your data should meet to continue to run. Learn more.

▽ **Only continue if...** (required)

| Question: Status ⌄ | (Text) Contains ⌄ | Fail | ✖ |

[ + AND ]  [ + OR ]

**The app-user prompt is 'Status'**

**And one of the anwers is 'Fail' which will trigger the alert.**

[ Test & Continue ]

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**Set up SMS by Zapier SMS**

👁 **Setup Preview**  Learn more                     ON 👁

ᗷᴑ **From Number** (optional)
Will attempt to send from this number, falling back to a random number if no longer available or unspecified.

| 19495654927    **Pick a number to send SMS** ➡️ | ⌄ |

ᗷᴑ **Message** (required)
Messages with more than 153 characters will be truncated.

| Asset failed test. Affected Service is Security Patrol 1.  ⬅️ | ☰➕ |

**Add text to the alert.**

🔄 Refresh Fields

[ Continue ]