

# DASH

USER GUIDE

# Zapier Integration

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# 1 What is Zapier?

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Zapier is a tool that moves information between your web apps and helps you automate repetitive tasks between these apps.

When an event happens in one app, Zapier can tell another app to perform (or **do**) a particular action.

The automated workflow or action that connects apps together is called a **Zap**.

You will need to have a Zapier account prior to connecting with DASH. You can find out more or sign up to Zapier at [www.zapier.com](http://www.zapier.com). Currently Zapier has a **Free option** which allows you up to 100 tasks per month.

# 2 What can I automate in DASH with Zapier?

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There can be different ways you can use Zapier to automate your workflow – all of which depends on the apps that you use and the way you want to set them up.

You can find out more about DASH integration with Zapier at <https://zapier.com/apps/DASH-software/integrations>.

In this user guide, we are going to show you **three actions**, each referred to as a “**Zap**”, that you can automate using Zapier to connect with **DASH Software**. These actions are:

1. Save Incoming Emails to DASH File Notes.
2. Save Outgoing Emails to DASH File Notes.
3. Create New Contacts in DASH.

To enable the above email actions, you need to use an email provider that is connected to Zapier, such as Microsoft Outlook or Gmail. To create a new Contact in DASH, you will need to use a relevant app that is also connected to Zapier such as Pipedrive or Hubspot or other CRM application.

**Note:** Each app may have different behaviors depending on how they integrate with Zapier.

## 2.1 Save Incoming Emails to DASH File Notes

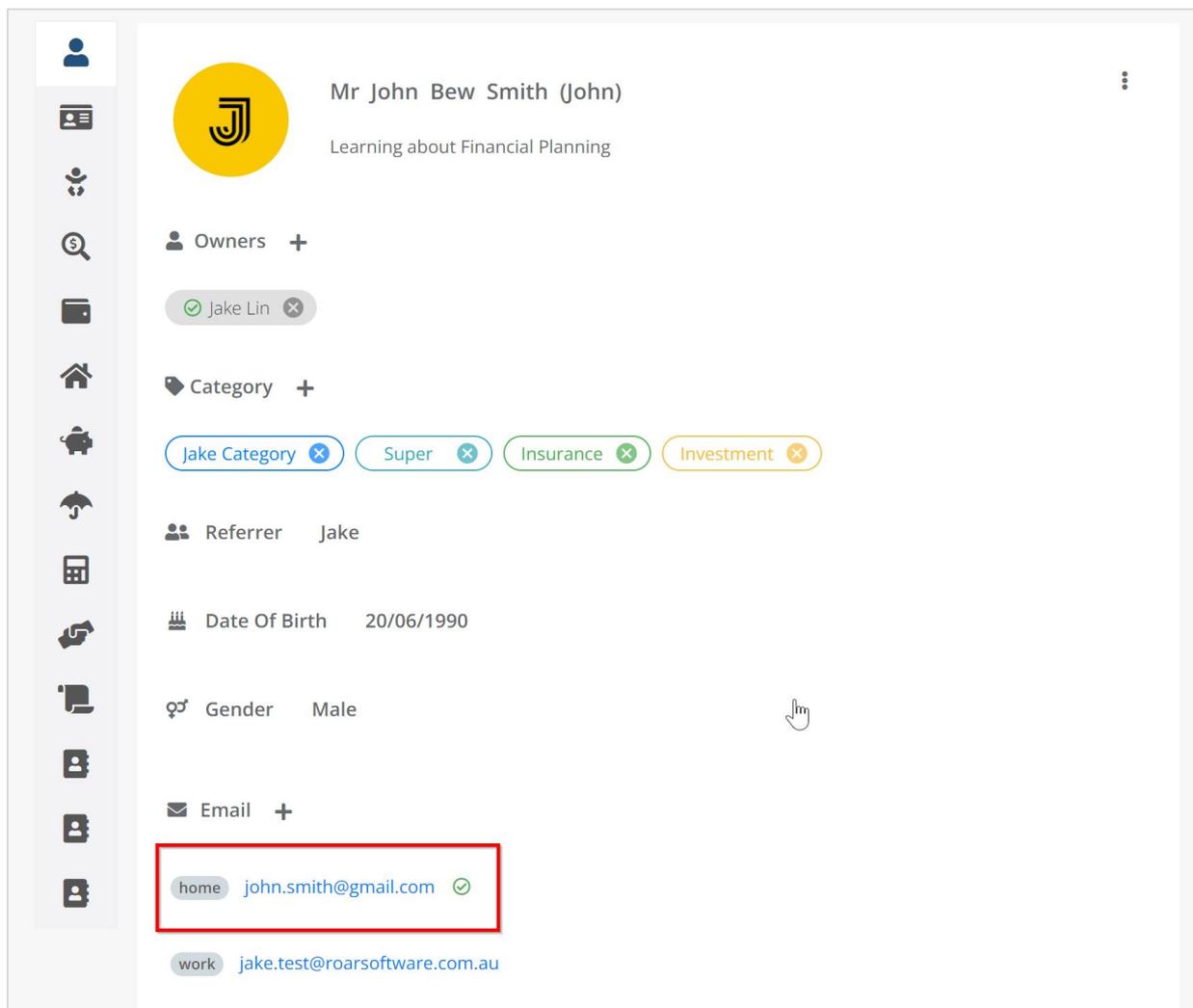
This Zap will help you to save emails received from your clients in your inbox into DASH File Notes automatically. Zapier will use your client's incoming **email address** to match with the email address in **DASH's Contact list**.

For example, there is a contact in DASH named "**John Smith**" with **default** email address "**john.smith@gmail.com**". When John sends an email to your Outlook account, Zapier will look for John's email address in DASH. If Zapier finds the Contact with the same email address in DASH, it will save the email to John's File Notes in DASH.

### 2.1.1 Initial Setup

1. Login to your **DASH Account**.
2. Login to your email account (we will use **Microsoft Outlook** as an example here).
3. Login to **Zapier** - <https://zapier.com/>, If you don't have an account already, you will need to create one.
4. Have a Contact or client in DASH with a valid email address. In this example, the Contact name is "**John Smith**" with an email address of "**john.smith@gmail.com**".

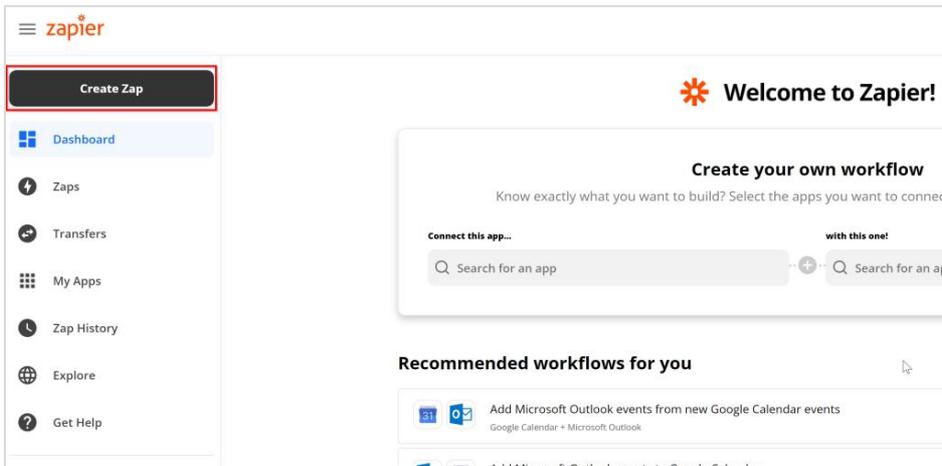
**Note:** This connection with Zapier is only mapped to the email address in DASH marked as **default**. If there is only one email address in DASH, it will automatically be marked as Default.



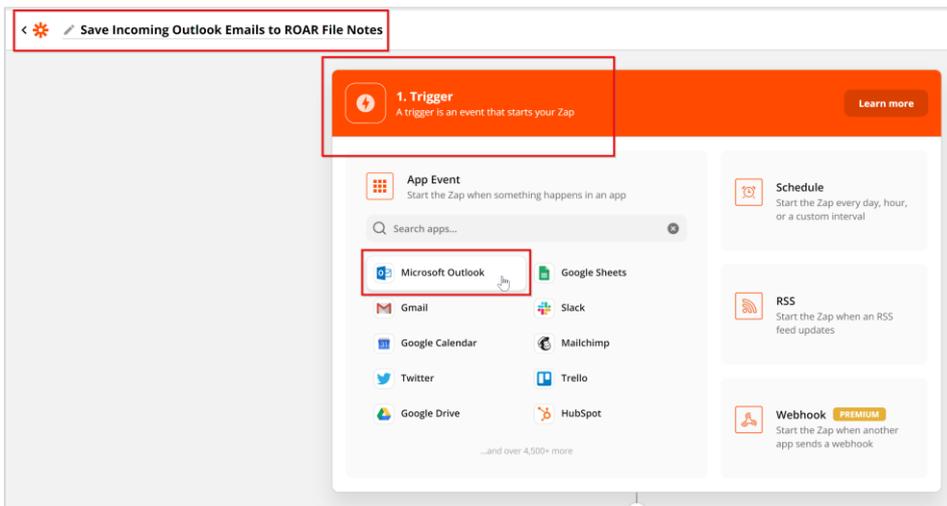
## 2.1.2 Creating a Zap

You will only need to follow the steps below to create the action or Zap once for each application.

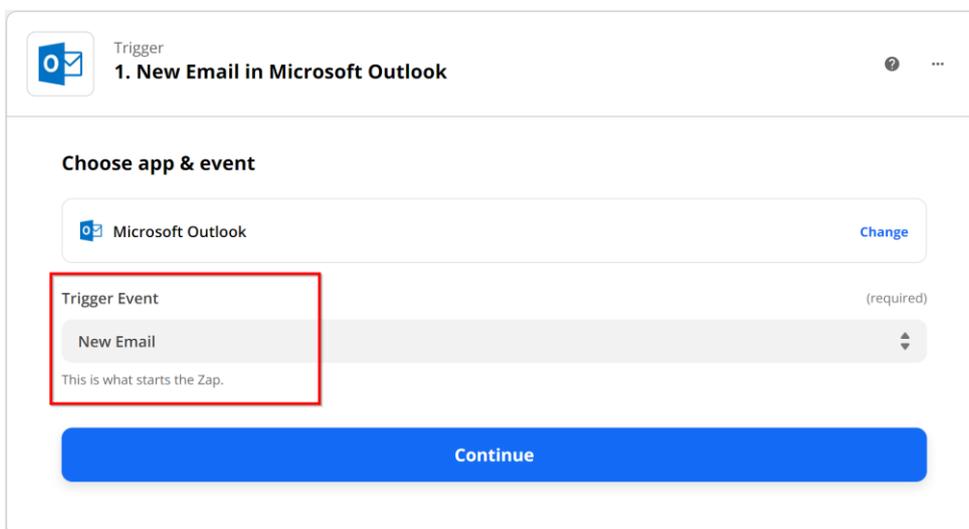
1. After logging into Zapier, click **“Create Zap”** on the Zapier Dashboard.



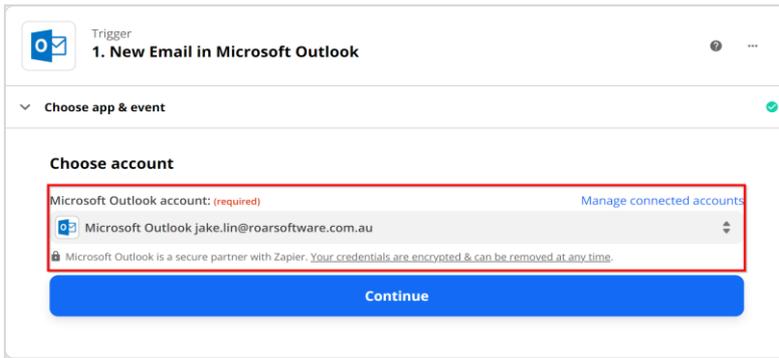
2. Name your action or **Zap** and Choose the trigger app as **Microsoft Outlook**.



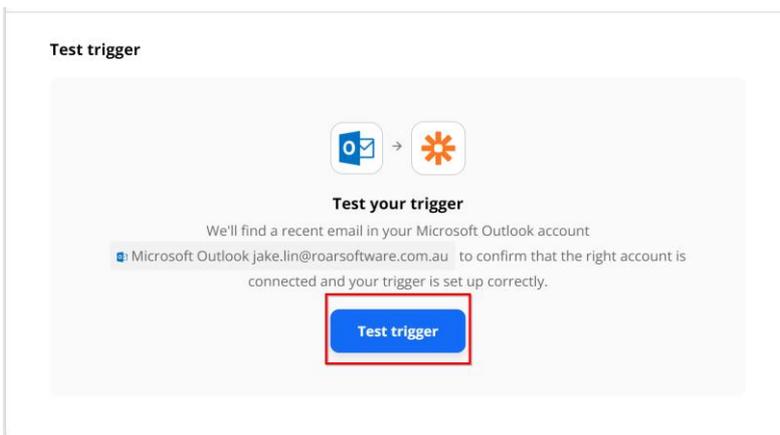
3. Choose the Trigger Event as **New Email**.



4. Sign into your **Microsoft Account** and click **Continue**.

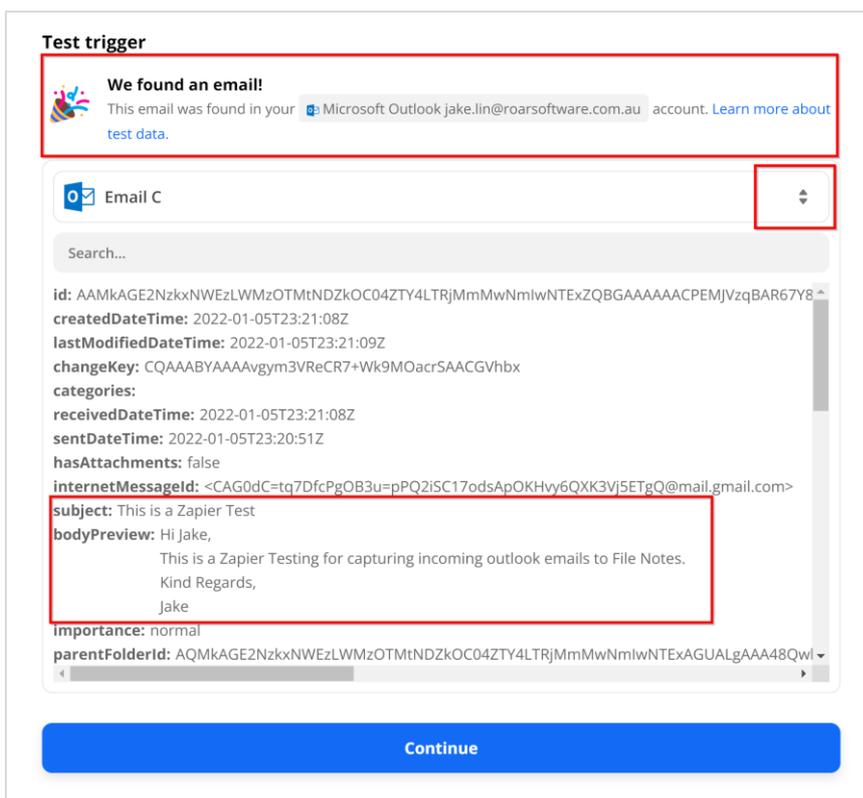


5. Click “**Test Trigger**” to confirm it is the right account.

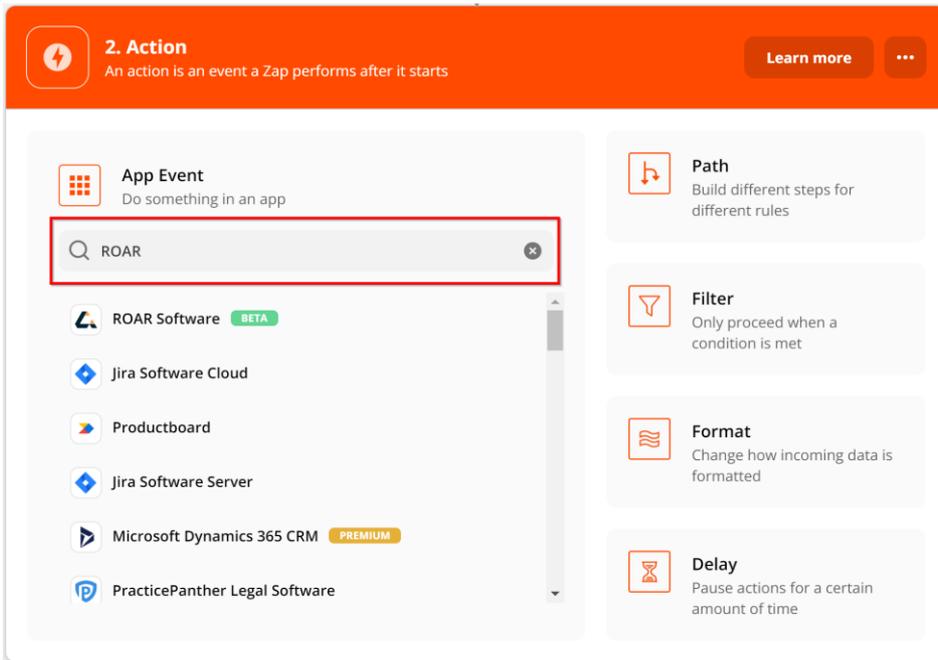


6. If it is successful, you will get a message “**We found an email**” and click “**Continue**”.

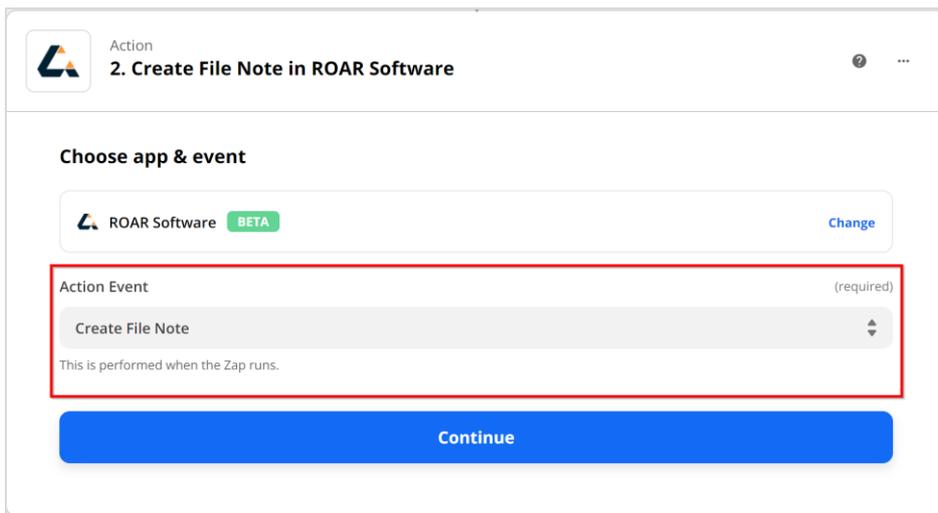
**Note:** Zapier will automatically choose the newest email in your inbox. If you have an email sent by your client recently, you can choose it by clicking the drop-down button. If not, you can go with the default email.



7. In choose the **Action App**, please search for **“DASH Software”** and **select it**.

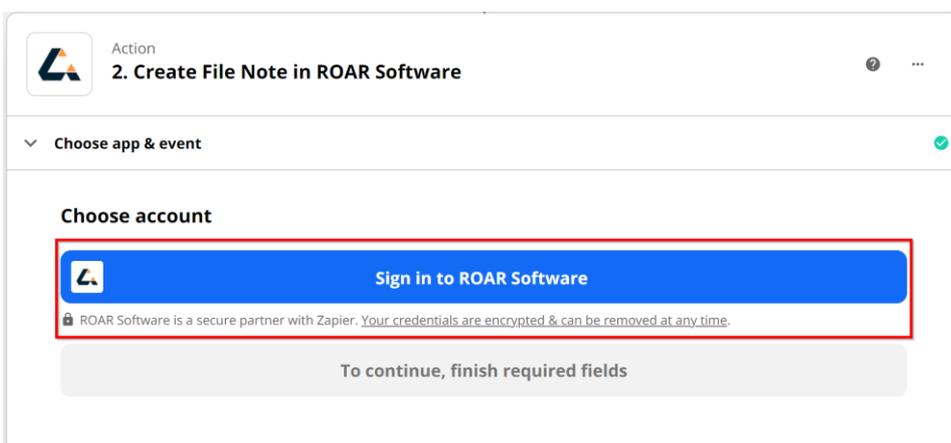


8. Choose **“Create File Note”** as an Action Event and click **“Continue”**.



9. Click **“Sign into DASH Software”** and click **“Continue”**.

**Note:** If you have more than one DASH Group, please make sure that you select the right group.



10. **Map** the following fields to display in File Notes and click **“Continue”**.

1. Email => **From** Email Addresses Address (As we are receiving the email)
2. Subject => Subject
3. Comment => Body Content
4. Categories => File Notes Categories of choice
5. Attachment => Files

**Note:** If the email contains **more than one** attachment, Zapier will save the attachments as a **Zip** folder in **File Notes**.

The screenshot shows the 'Set up action' configuration screen in Zapier. It includes the following fields and options:

- Email:** (required) - 1. From Email Address Address: [selected]
- Subject:** (required) - 1. Subject: This is a Zapier Test
- Comment:** (required) - 1. Body Content: `<html><head><...></body></html>`
- Categories:** Zapier Category, Choose value...
- Attachment:** 1. Files: No data

Buttons include 'Refresh fields' and a large blue 'Continue' button at the bottom.

11. Click **“Test & Continue”**.

The screenshot shows the 'Test action' preview screen in Zapier. It includes the following information:

- Test action:** Send File Note to ROAR Software
- Search file note data...** (input field)
- Email:** [selected]
- Subject:** SubjThis is a Zapier Test
- Comment:** `<html><head><meta http-equiv="Content-Type" content="text/html; charset=utf-8"></head><body><div dir="ltr">Hi Jake,<br></div><br></div><div>This is a Zapier Testing for capturing incoming outlook emails to File Notes.</div><div><br></div><div>Kind Regards,</div><div>jake</div></body></html>`
- Categories:** 1: Zapier Category
- Attachment:** 1: Filefiles

Buttons include 'Test & Review' and 'Test & Continue' (highlighted with a red box).

12. If the test gets “Email not found” error, it is because the email in **Step 6** is not from your DASH’s Contact. In this case, you can check “Skip Test” as it is **not required** to pass the test.

Test action (error) Skip Test

Resend File Note to ROAR Software  
To test ROAR Software, we need to create a new file note. This is what will be created:

**The file note could not be sent to ROAR Software.**  
Email not found. Troubleshoot error

Search file note data...

**Email:** [redacted]  
**Subject:** [redacted]  
**Comment:** <html><head>  
<meta http-equiv="Content-Type" content="text/html; charset=utf-8"><meta name="viewport" content="width=device-width, initial-scale=1"></head><body bgcolor="#ffffff" style="margin:0; padding:0"><style type="text/css" id="ignore">  
<!--  
@font-face  
{font-family:"Segoe UI";  
font-weight:100;  
font-style:normal}  
@font-face  
{font-family:"Segoe UI";  
font-weight:300;  
font-style:normal}  
@font-face  
{font-family:"Segoe UI";

Retest & Review Retest & Continue

13. Click “Turn on Zap” whether the test was successful or skipped.

Test action

Test was successful!  
We'll use this as a sample for setting up the rest of your Zap.

A file note was sent to ROAR Software about 39 seconds ago.

Search file note data...

fileNotes:

1:  
id: f9ce9c3f-0c9e-45f4-8680-19c52a34f575  
subject: This is a Zapier Test  
comments:  
1:  
id: 75b48187-fd92-4c5d-b2d6-8fa96087bbed  
value: <html><head>  
<meta http-equiv="Content-Type" content="text/html; charset=utf-8"></head><div dir="ltr">Hi Jake,<br><div><br></div><div>This is a Zapier Testing for capturing incoming outlook emails to File Notes.</div><div><br></div><div>Kind Regards,</div><div>Jake</div></div></body></html>

Retest action Turn on Zap

Successful

Test action (skipped)

Send File Note to ROAR Software  
To test ROAR Software, we need to create a new file note. This is what will be created:

Testing for this step was skipped. Try again anytime.

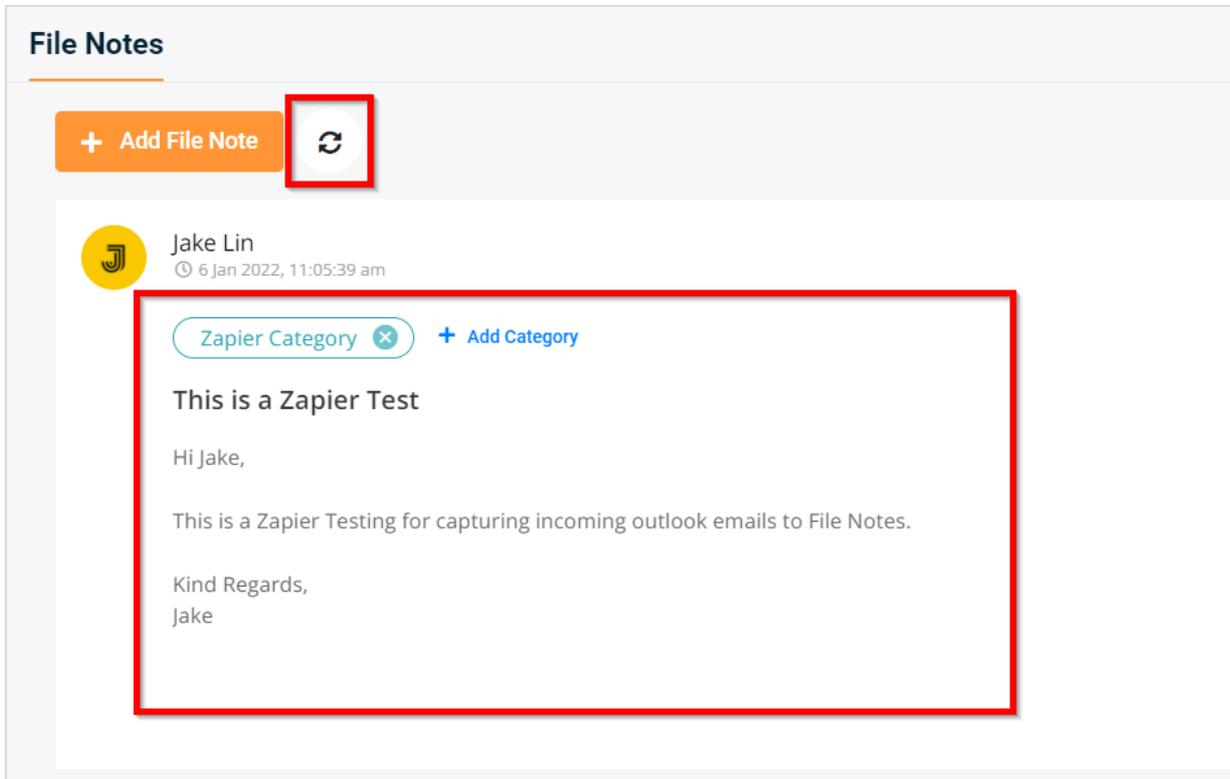
Search file note data...

**Email:** [redacted]  
**Subject:** [redacted]  
**Comment:** <html><head>  
<meta http-equiv="Content-Type" content="text/html; charset=utf-8"><meta name="viewport" content="width=device-width, initial-scale=1"></head><body bgcolor="#ffffff" style="margin:0; padding:0"><style type="text/css" id="ignore">  
<!--  
@font-face  
{font-family:"Segoe UI";  
font-weight:100;  
font-style:normal}  
@font-face  
{font-family:"Segoe UI";  
font-weight:300;  
font-style:normal}  
@font-face  
{font-family:"Segoe UI";

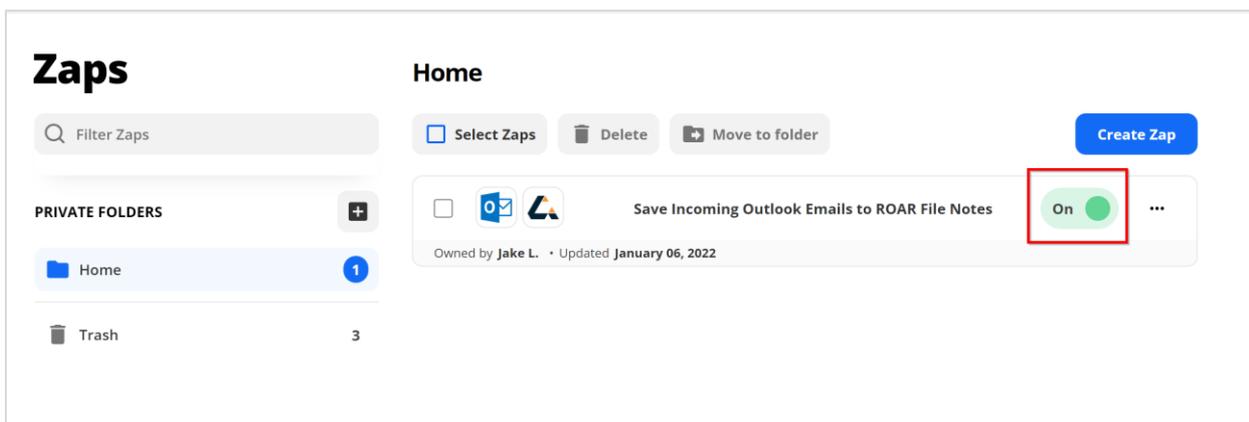
Test action Turn on Zap

Skipped

14. If the test was successful, please go to **DASH** to check File Notes against the Contact. Click “**Refresh**” button if the email is not there.  
**Note:** Sometimes it could take up to 15 minutes to see it in the File Notes depending on your Zapier subscription level.



15. In the Zapier Dashboard, if the Zap is **On**, Zapier will **monitor** your Outlook **inbox** and **save emails** to your DASH Contacts’ **File Notes** accordingly.



## 2.2 Save Outgoing Emails to DASH File Notes

This Zap will help you to save emails you send to your clients from your email account into DASH File Notes automatically.

### Gmail Limitation

Due to Google’s security protocols, users with **Personal Gmail Accounts** (which end in @gmail.com or @googlemail.com) won’t be able to setup this Zap. However, users with **Business Gmail Accounts** (which end in @businessdomain) can use this integration without any limitations.

### Outlook Limitation

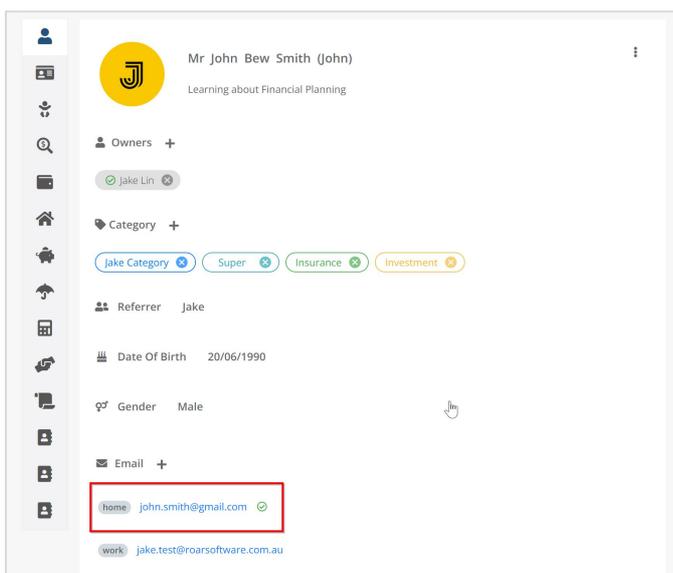
With the Microsoft accounts, due to authentication issue, users with **Business Microsoft Accounts** (which ends in @businessdomain) won’t be able to setup up this Zap. However, users with **Personal Microsoft Accounts** (which usually ends in @hotmail.com) can use this integration without any limitation. So, this is the opposite to Gmail accounts.

The **workaround** provided by Zapier support is to use “[Email by Zapier](#)” as a Trigger App instead of using Gmail or Microsoft Outlook. Please see the section “**2.3 Using “Email by Zapier” to Save Outgoing Emails to DASH File Notes**”. The following section is step by step guide to using **Gmail** as a Trigger App.

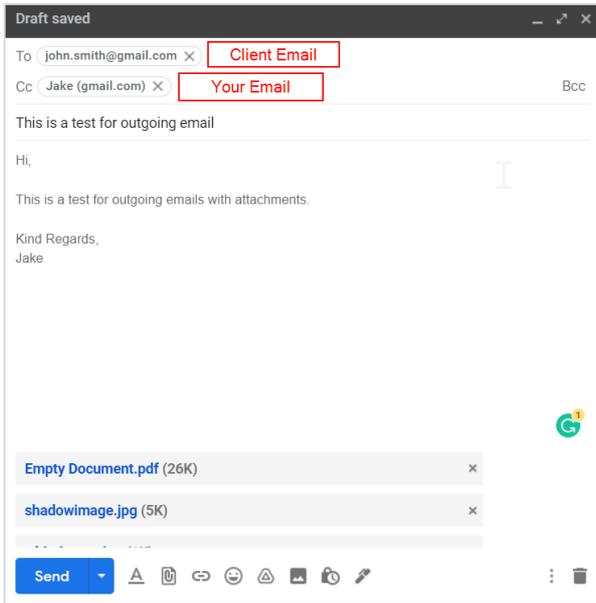
### 2.2.1 Initial Setup

1. Login to your **DASH Account**.
2. Login to your email account (we will use **Gmail** as an example here).
3. Login to **Zapier** - <https://zapier.com/>. If you don’t have an account already, you will need to create one.
4. Have a Contact or client in DASH with a valid email address. In this example, the Contact name is “**John Smith**” with an email address of “**john.smith@gmail.com**”.

**Note:** This connection with Zapier is only mapped to the email address in DASH marked as **default**. If there is only one email address in DASH, it will automatically be marked as Default.



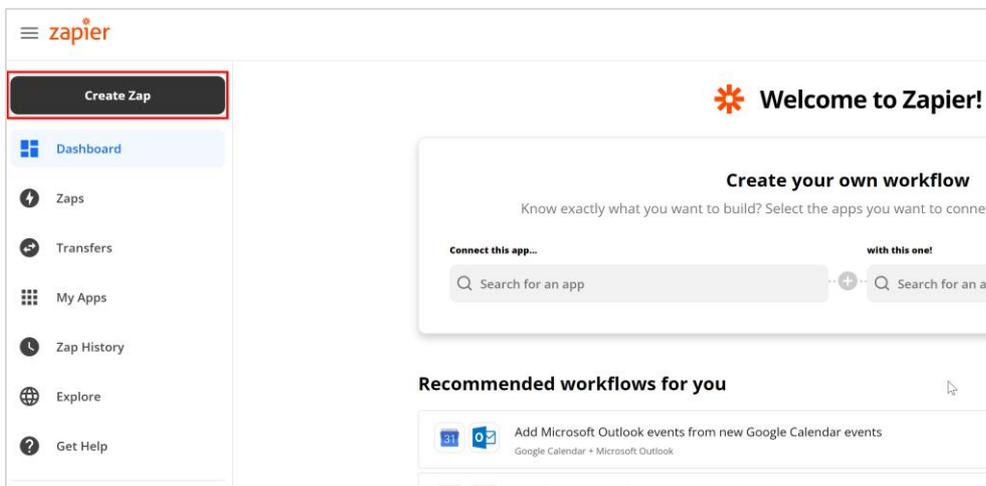
5. **Important:** You need to cc yourself in emails sent to clients if you wish the email to be saved to DASH File Notes. This is because Zapier monitors your **inbox (incoming emails) only** and cc'ing yourself will ensure a copy of this email is received in your inbox.



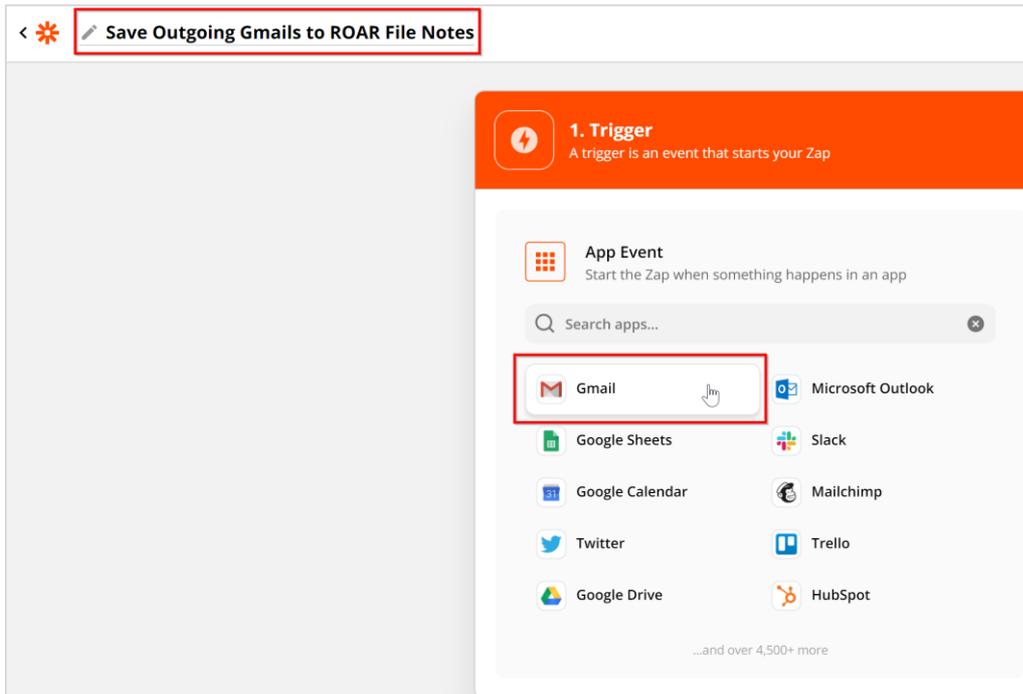
## 2.2.2 Creating a Zap

You will only need to follow the steps below to create the action or Zap once for each application.

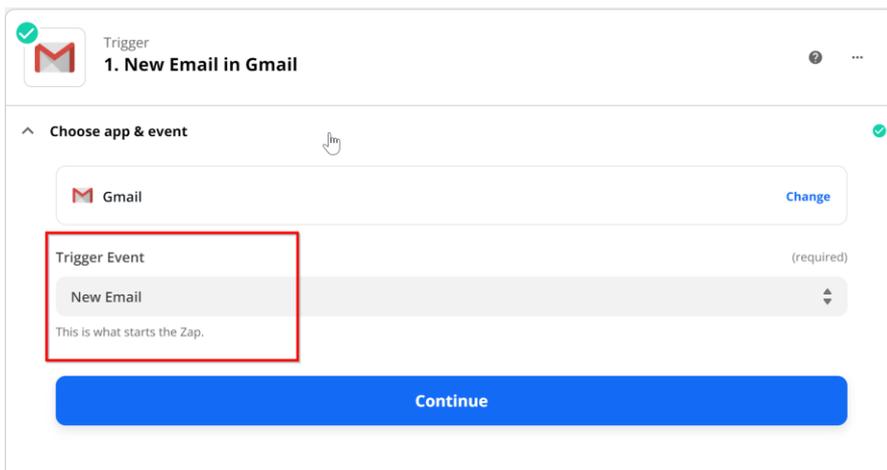
1. After logging into Zapier, click **“Create Zap”** on the Zapier Dashboard.



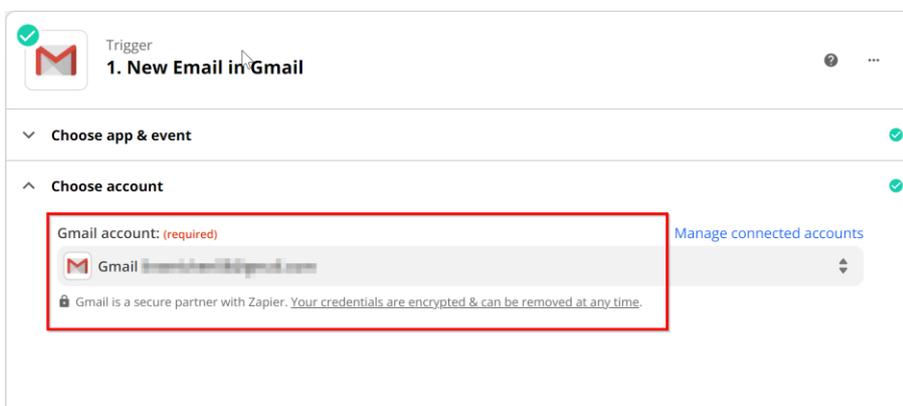
2. Name your action or **Zap** and Choose the trigger app as **Gmail**.



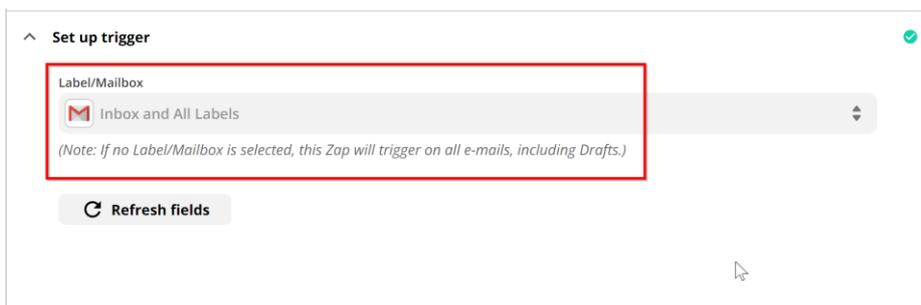
3. Choose the Trigger Event as **New Email**.



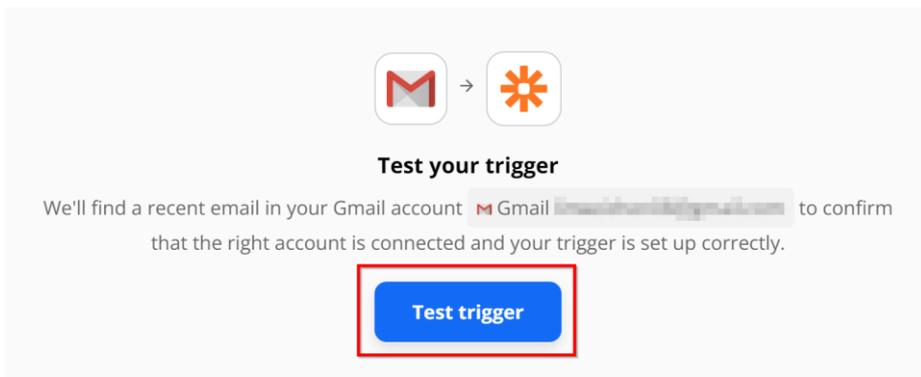
4. Sign into your **Google Account** and click **Continue**.



5. Set up trigger will be “Inbox and All Labels” by default.

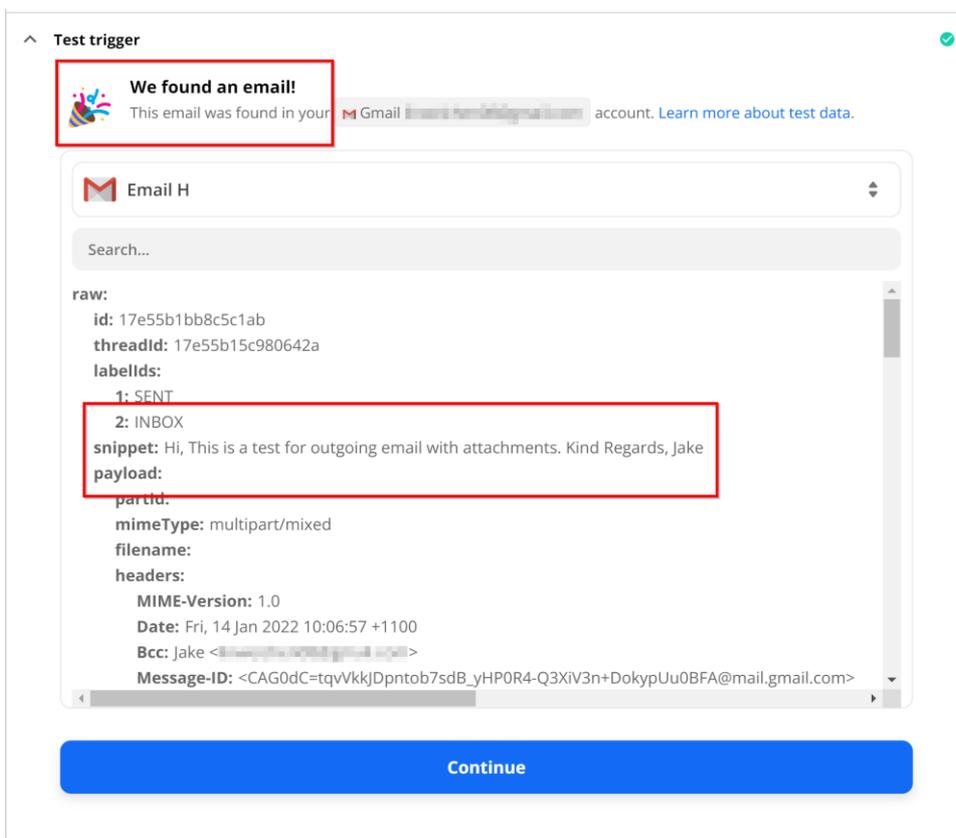


6. Click “Test Trigger” to confirm it is the right account.

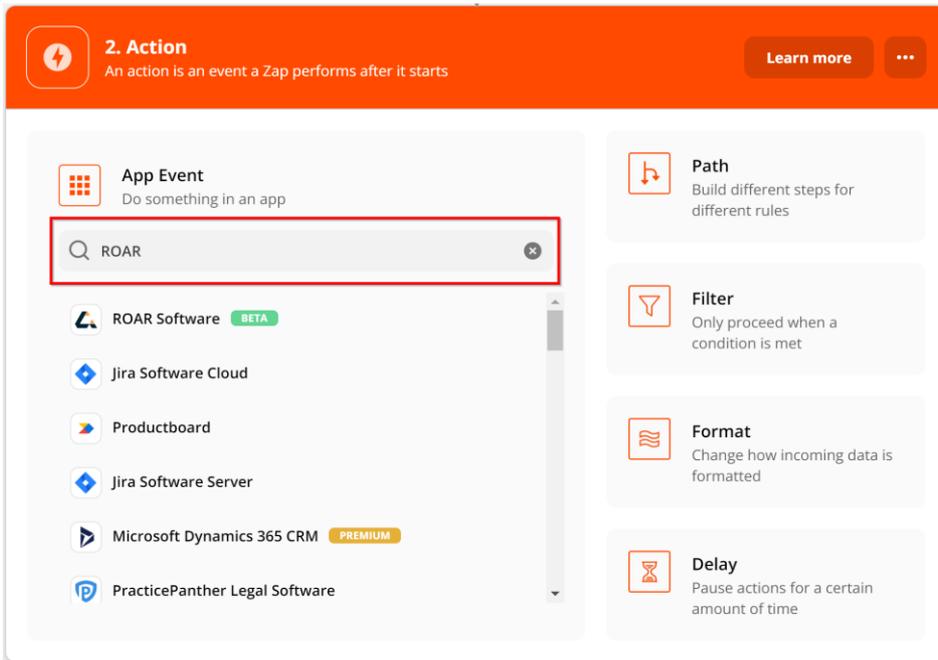


7. If it is successful, you will get a message “We found an email” and click “Continue”.

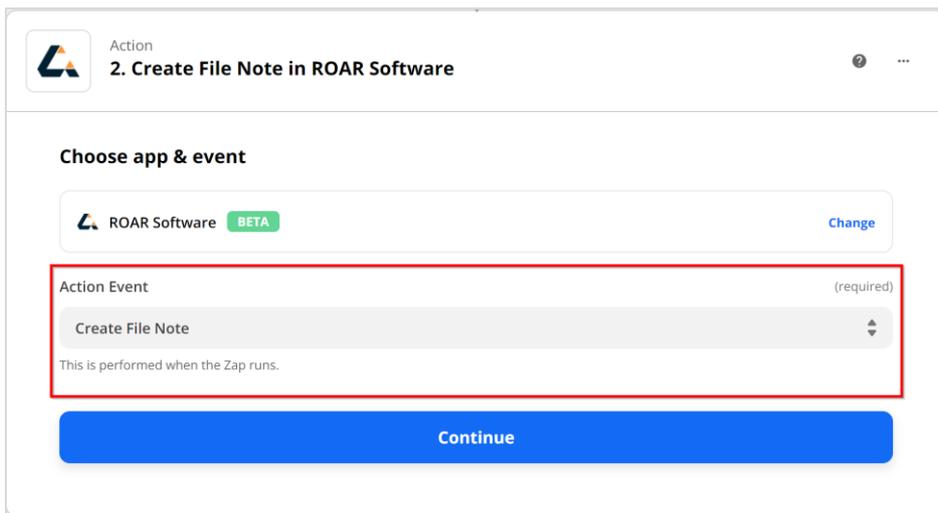
**Note:** Zapier will automatically choose the newest email in your inbox. If you have an email sent by your client recently, you can choose it by clicking the drop-down button. If not, you can go with the default email.



8. In the screen to choose the **Action App**, please search for “**DASH Software**” and **select it**.

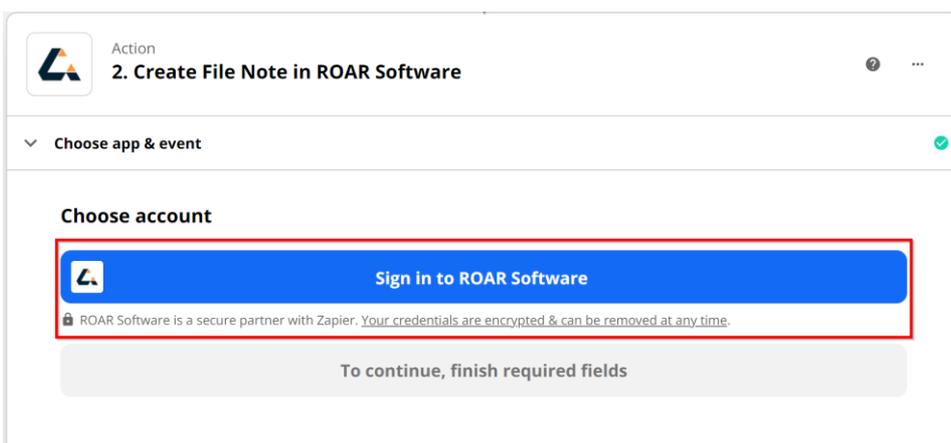


9. Choose “**Create File Note**” as an Action Event and click “**Continue**”.



10. Click “**Sign into DASH Software**” and click “**Continue**”.

**Note:** If you have more than one DASH Group, please make sure that you select the right group.



11. **Map** the following fields to display in File Notes and click **“Continue”**.

1. Email => **To** Emails (As we are sending)
2. Subject => Subject
3. Comment => Body HTML
4. Categories => File Notes Categories of choice
5. Attachment => All Attachments

**Note:** If the email contains **more than one** attachment, Zapier will save the attachments as a **Zip** folder in **File Notes**.

**Set up action**

Email (required)  
1. To Emails: john.smith@gmail.com Client's Email Address

ROAR will lookup contact using this email address and create file note against matching contact(s).

Subject (required)  
1. Subject: This is a test...outgoing email

Comment (required)  
1. Body HTML: <div dir="ltr">...e</div></div>

Categories  
Zapier Category  
Choose value...

Attachment  
1. All Attachments: (Exists but not shown)

Enter text or insert data...

Refresh fields

**Continue**

12. Click **“Test & Continue”**.

**Test action** Skip Test

Send File Note to ROAR Software  
To test ROAR Software, we need to create a new file note. This is what will be created:

Search file note data...

Email: john.smith@gmail.com  
Subject: This is a test for outgoing email  
Comment: <div dir="ltr"><span style="color:rgb(103,106,108);font-family:&quot;open sans&quot;,&quot;Helvetica Neue&quot;,&quot;Helvetica,Arial,sans-serif;font-size:13px">Hi, </span><div style="border:1px solid black;border-radius:5px;padding:5px;width:fit-content;float:right;font-family:&quot;open sans&quot;,&quot;Helvetica Neue&quot;,&quot;Helvetica,Arial,sans-serif;font-size:13px"><br><div style="border:1px solid black;border-radius:5px;padding:5px;float:left;width:fit-content;font-family:&quot;open sans&quot;,&quot;Helvetica Neue&quot;,&quot;Helvetica,Arial,sans-serif;font-size:13px">This is a test for outgoing emails with attachments. </div><div style="border:1px solid black;border-radius:5px;padding:5px;float:right;width:fit-content;font-family:&quot;open sans&quot;,&quot;Helvetica Neue&quot;,&quot;Helvetica,Arial,sans-serif;font-size:13px"><br><div style="border:1px solid black;border-radius:5px;padding:5px;float:left;width:fit-content;font-family:&quot;open sans&quot;,&quot;Helvetica Neue&quot;,&quot;Helvetica,Arial,sans-serif;font-size:13px">Kind Regards,</div><div style="border:1px solid black;border-radius:5px;padding:5px;float:right;width:fit-content;font-family:&quot;open sans&quot;,&quot;Helvetica Neue&quot;,&quot;Helvetica,Arial,sans-serif;font-size:13px">Jake</div></div>

Test & Review Test & Continue

13. If the test gets “Email not found” error, it is because the email in Step 7 is not from your DASH’s Contact. In this case, you can check “Skip Test” as it is not required to pass the test.

Test action (error) Skip Test

Resend File Note to ROAR Software  
To test ROAR Software, we need to create a new file note. This is what will be created:

**The file note could not be sent to ROAR Software.**  
Email not found. Troubleshoot error

Search file note data...

**Email:** test@dashpro.com.au  
**Subject:** Test the integration for the ROAR - Zapier integration v1.0.0.  
**Comment:** <html><head>  
<meta http-equiv="Content-Type" content="text/html; charset=utf-8"><meta name="viewport" content="width=device-width, initial-scale=1"></head><body bgcolor="#ffffff" style="margin:0; padding:0"><style type="text/css" id="ignore">  
<!--  
@font-face  
{font-family:"Segoe UI";  
font-weight:100;  
font-style:normal}  
@font-face  
{font-family:"Segoe UI";  
font-weight:300;  
font-style:normal}  
@font-face  
{font-family:"Segoe UI";

Retest & Review Retest & Continue

14. Click “Turn on Zap” whether the test was successful or skipped.

Test action

Test was successful!  
We'll use this as a sample for setting up the rest of your Zap.  
A file note was sent to ROAR Software about 39 seconds ago.

Search file note data...

fileNotes:  
1:  
id: f9ce9c3f-0c9e-45f4-8680-19c52a34f575  
subject: This is a Zapier Test  
comments:  
1:  
id: 75b48187-fd92-4c5d-b2d6-8fa96087bbed  
value: <html><head>  
<meta http-equiv="Content-Type" content="text/html; charset=utf-8"></head><body><div dir="ltr">Hi Jake,<br><div><br></div><div>This is a Zapier Testing for capturing incoming outlook emails to File Notes.</div><div><br></div><div>Kind Regards,</div><div>jake</div></div></body></html>

Retest action Turn on Zap

Successful

Test action (skipped)

Send File Note to ROAR Software  
To test ROAR Software, we need to create a new file note. This is what will be created:

Testing for this step was skipped. Try again anytime.

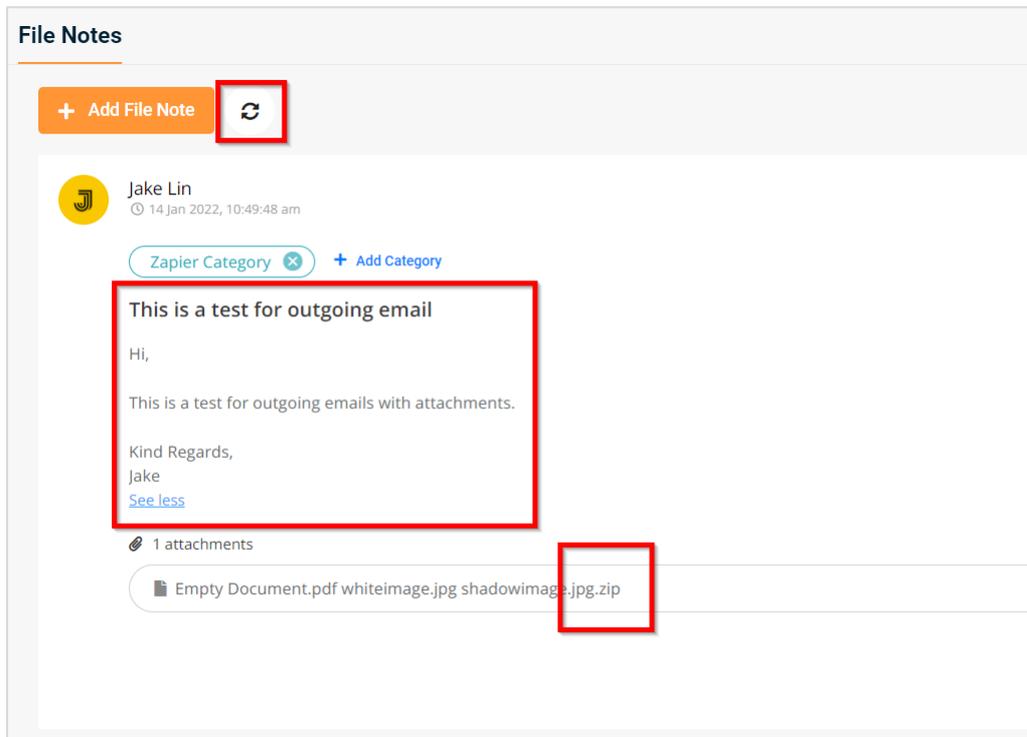
Search file note data...

**Email:** test@dashpro.com.au  
**Subject:** Test the integration for the ROAR - Zapier integration v1.0.0.  
**Comment:** <html><head>  
<meta http-equiv="Content-Type" content="text/html; charset=utf-8"><meta name="viewport" content="width=device-width, initial-scale=1"></head><body bgcolor="#ffffff" style="margin:0; padding:0"><style type="text/css" id="ignore">  
<!--  
@font-face  
{font-family:"Segoe UI";  
font-weight:100;  
font-style:normal}  
@font-face  
{font-family:"Segoe UI";  
font-weight:300;  
font-style:normal}  
@font-face  
{font-family:"Segoe UI";

Test action Turn on Zap

Skipped

15. If the test was successful, please go to DASH to check File Notes against the Contact. Click “**Refresh**” button if the email is not there.
- Note:** Sometimes it could take up to 15 minutes to see it in the File Notes depending on your Zapier subscription level.



**Note:** Attachments with more than one file will store as zip file in File Notes.

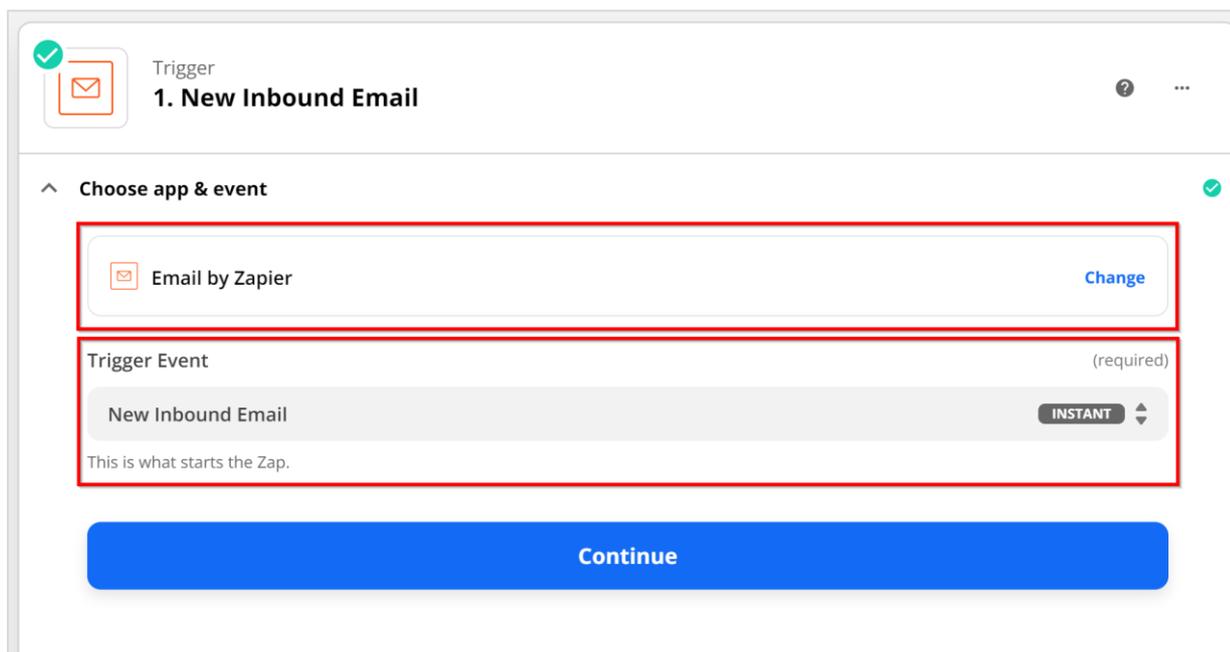
16. In the Zapier Dashboard, if the Zap is On, Zapier will monitor your inbox and save emails to your DASH Contacts' File Notes accordingly.

## 2.3 Using “Email by Zapier” to Save Outgoing Emails to DASH File Notes

If you are using **Microsoft Business Account** and **Personal Gmail Account**, you will have to use “**Email by Zapier**” as a **Trigger App** instead of Microsoft Outlook and Gmail. To save an email sent to a client in DASH File Notes, you will need to cc your Zapier email to the email being sent.

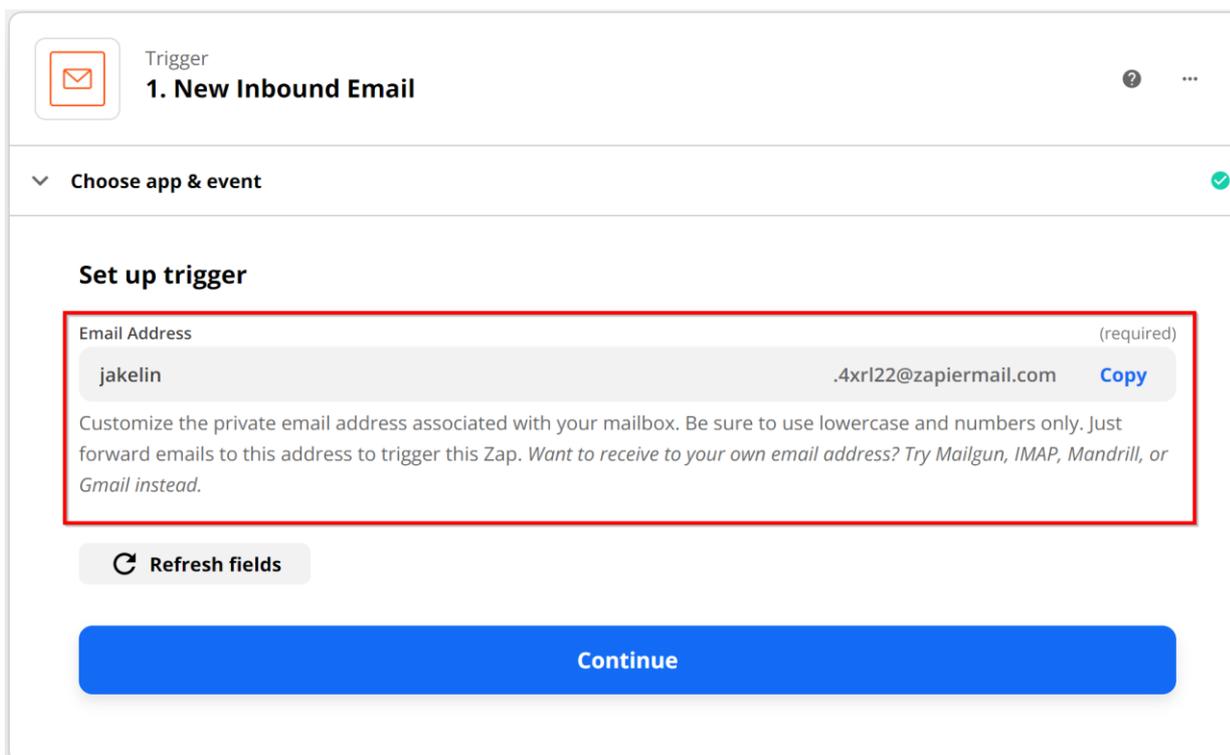
### 2.3.1 Trigger App Set up

1. Please select “**Email by Zapier**” as the Trigger app and “**New Inbound Email**” as the trigger event.



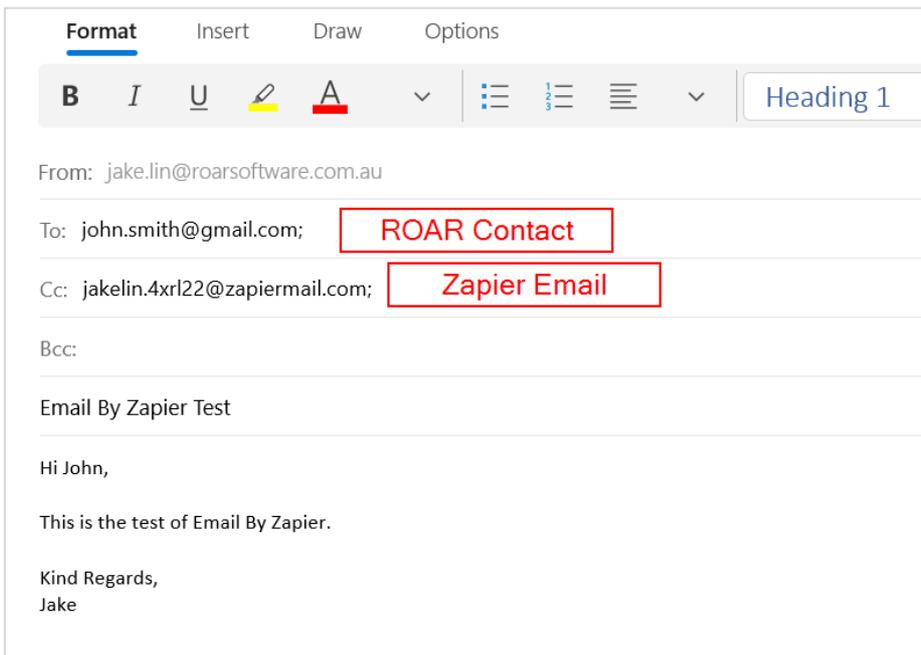
The screenshot shows the Zapier Trigger App configuration interface. At the top, it says "Trigger" and "1. New Inbound Email". Below this, there is a section titled "Choose app & event" with a dropdown arrow and a green checkmark. The selected app is "Email by Zapier" with a "Change" button to its right. The selected trigger event is "New Inbound Email" with a "INSTANT" dropdown menu to its right. Below the event selection, there is a blue "Continue" button.

2. At this step, you will need to create a Zapier email address. Therefore, please enter a name for this Zapier email address and copy this email address for future use.

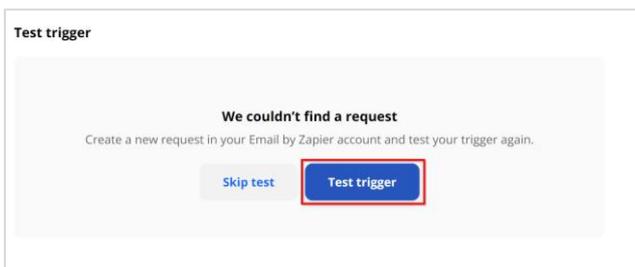


The screenshot shows the Zapier Trigger App configuration interface for setting up the trigger. At the top, it says "Trigger" and "1. New Inbound Email". Below this, there is a section titled "Choose app & event" with a dropdown arrow and a green checkmark. The selected app is "Email by Zapier" with a "Change" button to its right. The selected trigger event is "New Inbound Email" with a "INSTANT" dropdown menu to its right. Below the event selection, there is a section titled "Set up trigger" with a red box around the "Email Address" field. The "Email Address" field contains "jakelin" and ".4xrl22@zapiermail.com" with a "Copy" button to its right. Below the "Email Address" field, there is a "Refresh fields" button and a blue "Continue" button.

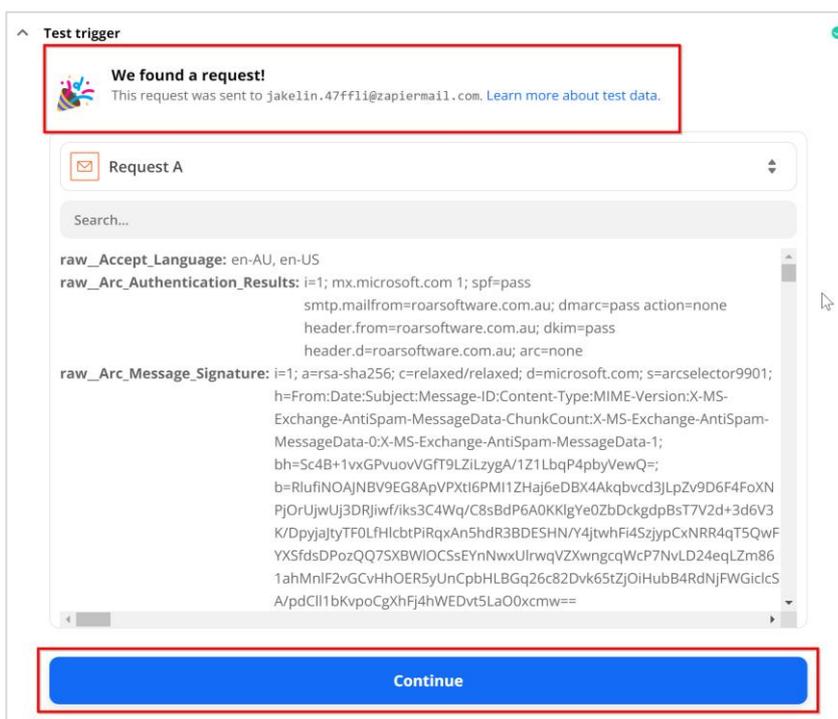
- Send a test email from your actual email address and cc your newly created Zapier email address from step 2. We suggest you create a test Contact in DASH to test this.



- After sending the email, please click "Test trigger".



- You should receive "We found a request" message and click "Continue".



## 2.3.2 Action App Set up

1. Choose Action app as “**DASH Software**” and Action Event as “**Create File Note**”.
2. Choose Your **DASH Account**.
3. Set up action by **mapping** the following fields to display in File Notes and click “**Continue**”.
  1. Email => Raw To Email
  2. Subject => Subject
  3. Comment => Body HTML
  4. Categories => File Notes Categories of choice
  5. Attachment => Attachment

### Set up action

Email (required)

1. Raw To Email: john.smith@gmail.com

ROAR will lookup contact using this email address and create file note against matching contact(s).

Subject (required)

1. Subject: Email By Zapier Test

Comment (required)

1. Body HTML: <html xmlns:o=""...ody>  
</html>

Categories

Zapier Category

Choose value...

Attachment

1. Attachment: No data

Enter text or insert data...

Refresh fields

**Continue**

4. Test the action and you should get “**Test was successful**” message. Please click “**Turn on Zap**” and you will receive an email to your account for validation. Please **confirm** the email and **turn on** the Zap again.

**Test action**

Test was successful!  
We'll use this as a sample for setting up the rest of your Zap.

A file note was sent to ROAR Software about 29 seconds ago.

Search file note data...

**fileNotes:**

1:

**id:** 0a00184f-e61c-4fbd-a9ee-83a2a3ec4fc8  
**subject:** Email By Zapier Test  
**comments:**

1:

**id:** 61af4b4d-dc97-4b62-b034-7f64a49929ca  
**value:** <html xmlns:o="urn:schemas-microsoft-com:office:office" xmlns:w="urn:schemas-microsoft-com:office:word" xmlns:m="http://schemas.microsoft.com/office/2004/12/omml" xmlns="http://www.w3.org/TR/REC-html40">  
<head>  
<meta http-equiv="Content-Type" content="text/html; charset=us-ascii">  
<meta name="Generator" content="Microsoft Word 15 (filtered medium)">  
<style><!--  
/\* Font Definitions \*/  
@font-face

Retest action

Turn on Zap

5. Please go to DASH to check File Notes against the Contact. Click “**Refresh**” button if the email is not there.

Jake Lin  
18 Jan 2022, 3:41:54 pm

Zapier Category + Add Category

**Email By Zapier Test**

Hi John,

This is the test of Email by Zapier.

Kind Regards,  
Jake

[See less](#)

6. When the Zap is **on**, you can save your outgoing emails to DASH File Notes by **cc'ing** your custom Zapier Email address.  
**Note:** This will work with **any types** of Microsoft or Google Accounts – personal or business accounts.

## 2.4 Create New Contacts in DASH

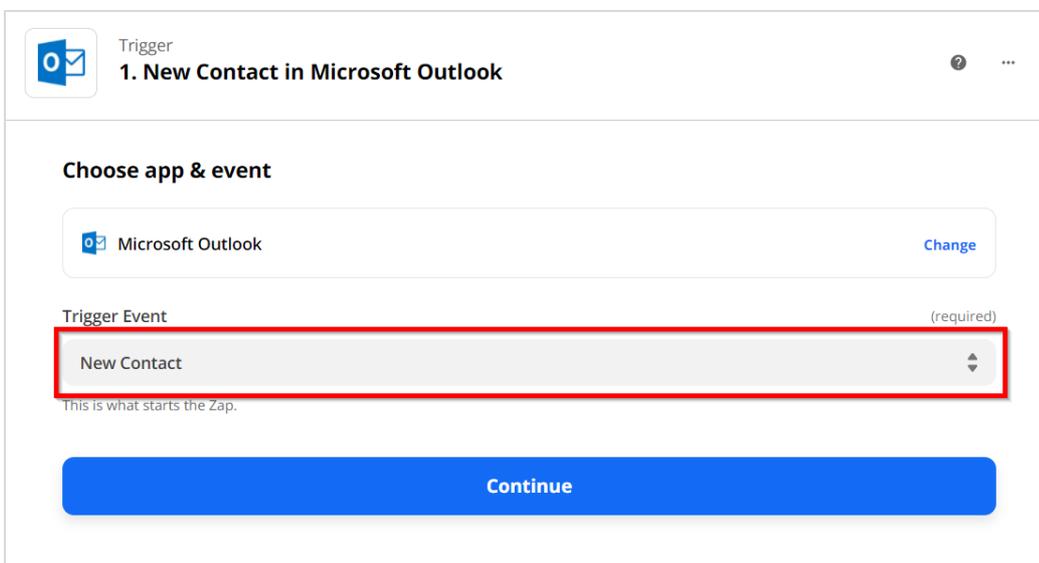
This Zap will allow you to create **new contacts** from another application in DASH. For demonstration purposes here, we will be creating Contacts in DASH from **Microsoft Outlook**.

### 2.4.1 Initial Setup

1. Login to **DASH Account**.
2. Login to **Microsoft Outlook** account and go to “Switch to People” App.
3. Login to **Zapier** - <https://zapier.com/>.

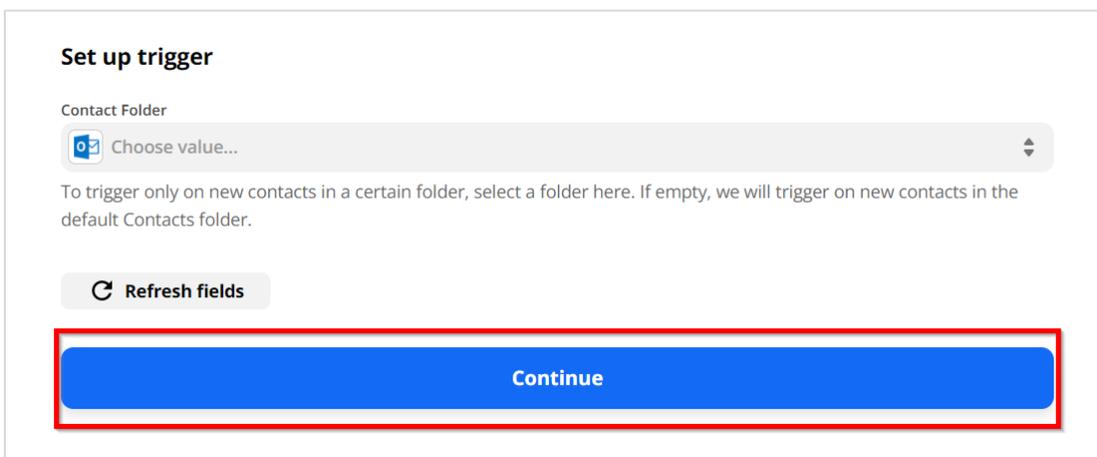
### 2.4.2 Creating a Zap

1. Click “**Create Zap**” in the Zapier Dashboard.
2. Please “**Name the Zap**” and Choose the Trigger App as “**Microsoft Outlook**”.
3. Please choose the Trigger Event as “**New Contact**” and click “**Continue**”.



The screenshot shows the Zapier interface for setting up a trigger. At the top, it says "Trigger" and "1. New Contact in Microsoft Outlook". Below this, there is a section titled "Choose app & event" where "Microsoft Outlook" is selected, with a "Change" button to the right. Underneath, the "Trigger Event" is set to "New Contact", which is highlighted with a red box. A "(required)" label is next to the event selection. Below the event selection, there is a blue "Continue" button.

4. Please choose your “**Outlook Account**” and click “**Continue**”.
5. We do not need to set up trigger as it is creating a new Contact. Please click “**Continue**”.



The screenshot shows the "Set up trigger" screen in Zapier. It has a section titled "Set up trigger" with a "Contact Folder" dropdown menu. The dropdown menu is currently set to "Choose value...". Below the dropdown, there is a text explanation: "To trigger only on new contacts in a certain folder, select a folder here. If empty, we will trigger on new contacts in the default Contacts folder." There is a "Refresh fields" button with a circular arrow icon. At the bottom, there is a blue "Continue" button, which is highlighted with a red box.

6. Please choose a **Contact** and click **“Continue”**.

**Test trigger**

 **We found a contact!**  
This contact was found in your  Microsoft Outlook `jake.lin@roarsoftware.com.au` account. [Learn more about test data.](#)

 Contact D

Search...

**id:** AAMkAGE2NzkxNWEzLWMzOTMtNDZkOC04ZTY4LTRjMmMwNmlwNTExZQBGAACPEMJVzqBAR67Y8  
**createdDateTime:** 2022-01-07T05:42:15Z  
**lastModifiedDateTime:** 2022-01-07T05:42:15Z  
**changeKey:** EQAAABYAAAvgym3VReCR7+Wk9MOacrSAACHU7om  
**categories:**  
**parentFolderId:** AQMkAGE2NzkxNWEzLWMzOTMtNDZkOC04ZTY4LTRjMmMwNmlwNTExAGUALgAAA48Qwi  
**birthday:** 1990-01-01T11:59:00Z

**fileAs:**  
**displayName:** Joe Smith  
**givenName:** Joe  
**initials:** null  
**middleName:**  
**nickName:**  
**surname:** Smith  
**title:**  
**yomiGivenName:**

**Continue**

7. Please choose **“DASH Software”** as the Action App and **“Create Contact”** as an Action Event. Click **“Continue”**.

 Action  
**2. Create Contact in ROAR Software** ? ...

**Choose app & event**

 ROAR Software BETA Change

Action Event (required)

Create Contact

This is performed when the Zap runs.

**Continue**

8. Please choose your **“DASH Account”** and set up the action by mapping the fields as below and click **“Continue”**.  
**Note:** Mapping the fields depends on the inputs you entered when creating Contacts. For example, if you entered work address instead of home address, you would have to map with the work address.
1. Title => Title
  2. First Name => Given Name
  3. Last Name => Surname
  4. Date of Birth => Birthday
  5. Email => Email Addresses Address
  6. Phone => **Mobile** Phone
  7. Street => **Home** Address Street
  8. Suburb => **Home** Address City
  9. State => **Home** Address State
  10. Postcode => **Home** Address Postal Code
  11. Country => **Home** Address Country Or Region
  12. Categories => DASH Categories of your choice (This will be the default for all the future contacts)
  13. Referrer => Text of your choice (This will be the default for all the future contacts)
  14. About => Text of your choice (This will be the default for all the future contacts)

Contact

Title  
1. Title: Mrs

First Name (required)  
1. Given Name: Jake

Last Name (required)  
1. Surname: Testing

Date of Birth   
1. Birthday: 2022-01-07T11:59:00Z

Email  
1. Email Addresses Address: personal@gmail.... work@gmail.com

Phone  
1. Mobile Phone: 04215421452

Street  
1. Home Address Street: 12 Grazier Road

Suburb  
1. Home Address City: Rouse Hill

State  
1. Home Address State: NSW

Postcode  
1. Home Address Postal Code: 2155

Country  
1. Home Address Country Or Region: Australia

Categories  
Jake Category

Referrer  
Jake

About  
This is a contact from Zapier

9. Please test the action by clicking “Test & Continue”.

**Test action** Skip Test



Send Contact to ROAR Software  
To test ROAR Software, we need to create a new contact. This is what will be created:

Search contact data...

**Title:** Mr  
**First Name:** Joe  
**Last Name:** Smith  
**Date of Birth:** 1990-01-01T11:59:00Z  
**Email:** joe.smith@roarsoftware.com.au  
**Phone:** 0421 545 269  
**Street:** 12 Rose Street  
**Suburb:** Newtown  
**State:** NSW  
**Postcode:** 2042  
**Country:** Australia  
**Categories:** Jake Category  
**Referrer:** Jake  
**About:** This is a contact from Zapier

Test & Review

Test & Continue

10. If the test was successful, please click “Turn on Zap”.

**Test action**

Test was successful!  
We'll use this as a sample for setting up the rest of your Zap.

A contact was sent to ROAR Software about 29 seconds ago.

Search contact data...

**id:** 8e29e5eb-75c2-4a60-a7c1-57331efdf4af  
**first\_name:** Joe  
**last\_name:** Smith  
**email:** joe.smith@roarsoftware.com.au

Retest action

Turn on Zap

11. Please go to Contacts in DASH to check if the **Contact** has been created.

Joe Smith  
This is a contact from Zapier

Owners +

Referrer Jake

Date Of Birth 01/01/1990

Gender

Category +  
Jake Category

Email +  
joe.smith@roarsoftware.com.au

Phone +  
0421 545 269

Address +  
12 Rose Street Newtown NSW 2042 Australia

## 2.5 Saving “Fireflies.ai” transcription to DASH File Notes

### 2.5.1 Initial Setup

1. Create a new “Fireflies.ai” account if you don’t have one at <https://fireflies.ai/>.
  2. Login to your **DASH Account**.
  3. Have a Contact in DASH with a valid email address. In this example, the Contact name is “**John Smith**” with an email address of “**ethan.chen@dash.com.au**”.
  4. The meeting with **ethan.chen@dash.com.au** will be saved to the Contact’s File Note in DASH.
- Note:** The connection with Zapier is only mapped to the **default** email address. If there is only one email address in DASH, it will automatically be marked as Default.

The screenshot shows the DASH interface with a sidebar on the left containing navigation options: Dashboard, Contacts (highlighted), Documents, Agreements, Tasks, Quest (beta), Store, and Settings. The main content area displays the profile for 'Mr John Smith (Johnny)'. The profile includes a yellow profile picture with a 'J' logo, a 'Category' field with 'Couple' and 'Jake' tags, and fields for 'Date of Birth' (09/08/1988, Age 35), 'Gender' (Male), 'TFN' (\*\*\* \*\* 89), and 'Director ID' (-). Under the 'Contact Method' section, the email address 'ethan.chen@dash.com.au' is listed with the label 'others' and is highlighted with a red rectangular box. Other contact methods include a mobile phone number '20735535' and a home address '31 Saved Draft Street 2 Test Karara NSW 2000 Australia'. A 'Show more' link is visible at the bottom of the contact methods list.

## 2.5.2 Creating Zap

1. Login to **Zapier** - <https://zapier.com/>. If you don't have an account already, you will need to create one.
2. Create new Zap.
3. Choose "Fireflies.ai" as the Trigger App. The Event for the App is "New Meeting".

The screenshot shows the Zapier interface for creating a new Zap. On the left, a list of triggers and actions is shown. The first trigger is "1. New Meeting in Fireflies.ai" and the second action is "2. Create File Note in ROAR Software". On the right, a detailed view of the "1. New Meeting in Fireflies.ai" trigger is shown. It includes the following information:

- App & event:**
  - App: Fireflies.ai
  - Event: New Meeting
- Account:** Fireflies.ai jake.lin@dash.com.au account
- Step details:**
  - Transcript Format: pdf
  - Include Speaker Names: true

4. Connect your "Fireflies.ai" account in Zapier by entering API Key and Email. The API key can be found in Settings -> API Key. The email address is the email address that you create your "Fireflies.ai" account.

The screenshot shows the Fireflies Labs settings page. The "Settings" menu item is highlighted in the left sidebar. The "Developer Settings" section is expanded, showing the "API Key" field with the value "3b7471b9-520c-48da-9518-abc8b1398c0d" and a "Reset" button. Below it, the "Webhook URL" field is shown with the placeholder "e.g https://<your-domain>" and a "Save" button.

The screenshot shows a confirmation dialog titled "Allow Zapier to access your Fireflies.ai Account?". It contains the following information:

- API Key (required):** You can find your API key details [here](#).
- Email (required):** Please see this [link](#) on how to Integrate with Fireflies.ai and Make a Zap.
- Buttons: "Yes, Continue to Fireflies.ai" and "Cancel".

5. Choose “ROAR Software” now known as “DASH” as Action App. The Event for the App is “Create File Note”.

 **2. Create File Note in ROAR Software** ✕

---

**App & event**

|       |   |
|-------|---|
| App   |  ROAR Software |
| Event | Create File Note  |

**ROAR Software - Jake Lin (DASH (Internal Test))**  
- Jake Lin (DASH (Internal Test)) 

6. Log into your “DASH” account to connect with Zapier.

7. In the Action, please map the following fields

1. Email => Attendee Email
2. Subject => Title
3. Comment => Short Summary (Can choose other fields, depending on your needs)
4. Category => File Note Category (Can leave it blank)
5. Attachment => Transcript File Url

\* **Email** (required)

 ✕

Enter text or insert data...

ROAR will lookup contact using this email address and create file... [more](#)

\* **Subject** (required)



\* **Comment** (required)

Meeting Description: 

**Categories**

Zapier Category

Choose value...

**Attachment**

1. Transcript File Url: https://downloa...esTestingst.pdf

Enter text or insert data...

8. Once the Zap is published and turned on, any meetings with the clients whose email address is in the meeting attendee will automatically save to the contact's File Note. For example, the below transcript is from the meeting with [ethan.chen@dash.com.au](mailto:ethan.chen@dash.com.au), and it is saved to the Contact's file note.

Jake Lin  
 22 Apr 2024, 11:04:53 am

+ Add Category

**Fireflies Testing**

Meeting Description:  
 Jake Lin,

1 attachments

70Fsng12MZisB1Zv-Timestamp-Speakers-FirefliesTestingst.pdf

9. Please note that you will have to turn on the toggle in "fireflies.ai" for the AI to join the meeting and take notes.

Upcoming Meetings · 3

Tomorrow, Apr 23 2 Join All

11:00 AM  
 Global Data Warehouse Catch Up

EN

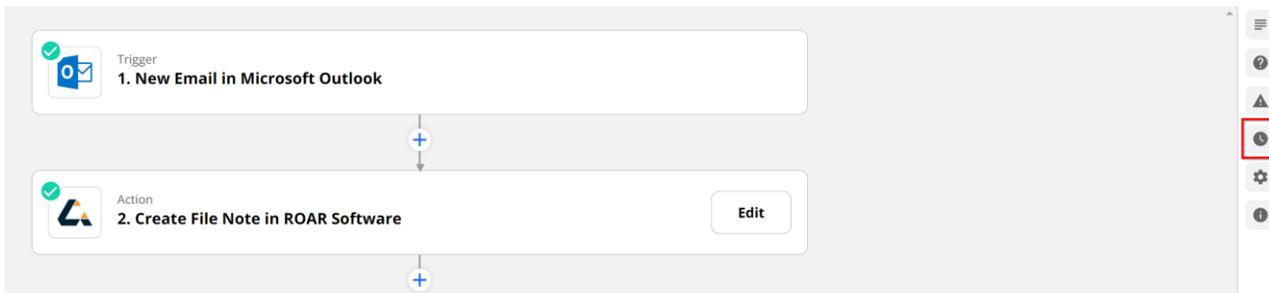
01:30 PM  
 Client Services Team Stand-up

EN

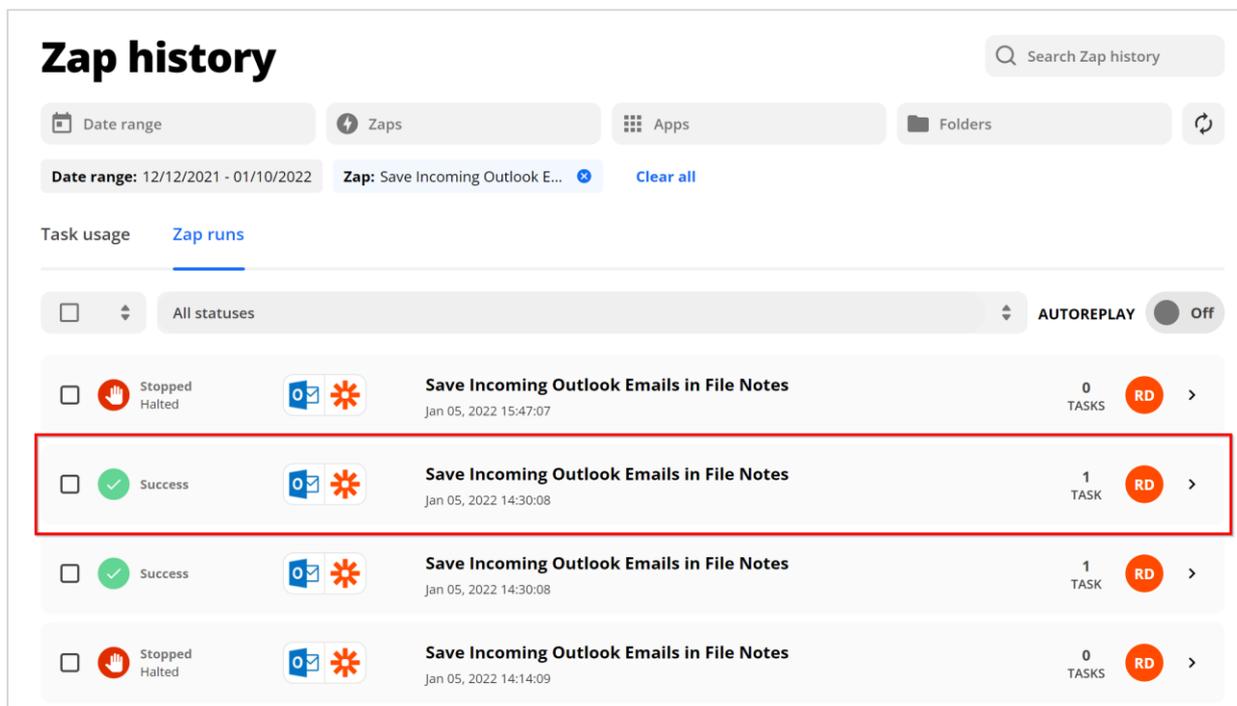
### 3 Zapier Tips and Tricks

#### 3.1 Checking Zap History

You can click “Zap History” on the right side of your Zap dashboard to see the number of Zap runs.



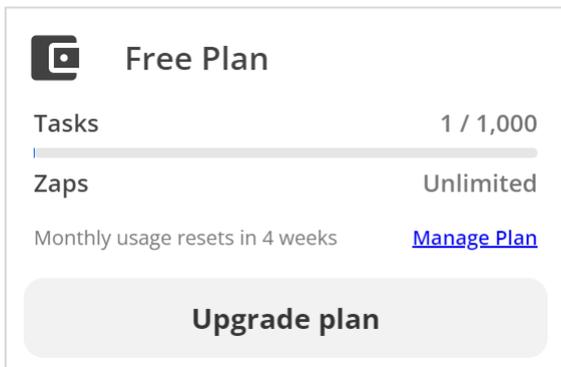
In the image below, “Success” means Zapier successfully saved the email to the DASH File Notes while “Stopped” means Zapier couldn’t find the incoming email address in the DASH Contact. So, the email was skipped (not error).



## 3.2 Keep track of the Tasks and Zaps

A **Task** is an action one of your Zaps has successfully completed. For example, if one of your Zaps has successfully completed an action, it will count it as a task. Zapier doesn't count test actions (when we create a new Zap) as tasks.

**Note:** Knowing this is important as it helps you decide which Zapier subscription plan is appropriate to your needs.



The screenshot displays the Zapier 'Free Plan' interface. It features a Zapier logo icon, the text 'Free Plan', and a progress bar for 'Tasks' showing '1 / 1,000'. Below this, it states 'Zaps Unlimited' and 'Monthly usage resets in 4 weeks' with a link to 'Manage Plan'. At the bottom, there is a prominent 'Upgrade plan' button.

| Category | Usage     |
|----------|-----------|
| Tasks    | 1 / 1,000 |
| Zaps     | Unlimited |

Monthly usage resets in 4 weeks [Manage Plan](#)

**Upgrade plan**

In the example above, Zapier allows **1000 tasks** per month and unlimited Zaps.