

Automating Email Example

This is a form example for lesson 6 of automate to win

Email *

Valid email

This form is collecting emails. [Change settings](#)

Select question type here

What is your name?

Short answer

Short answer text

Type your question here



Required



On a scale of 1 to 10 how would you rate Automate To Win? *

1 2 3 4 5 6 7 8 9 10

Horrible



Amazing

This is the data input!

Open Google Forms (forms.google.com) and click on the "+ Blank" option to create a new form.

Give your form a title, such as "Customer Inquiry Form."

Add necessary fields like Name, Email Address, and Inquiry Message.

Customize the form to fit your brand by changing the theme, adding images or logos, and adjusting the form layout.

Add new question

Add video

Add break section

Automating Email Example

This is a form example for lesson 6 of automate to win

automatetowin@gmail.com [Switch account](#)

* Indicates required question

This is the owner of the form

Email *

Your email

What is your name? *

Your answer

Personalization of form

On a scale of 1 to 10 how would you rate Automate To Win? *

1 2 3 4 5 6 7 8 9 10

Horrible Amazing

This is the data input!

Submit

Clear form

Make sure that you are collecting emails, that your google account is the owner of the form and that you are collecting at least one input from the user.

In this example I have placed a 1-10 scale for the user to rate the website.

Settings

Make this a quiz
Assign point values, set answers, and automatically provide feedback

Responses
Manage how responses are collected and protected

Collect email addresses
Respondents will manually enter their email response

Responder input

Send responders a copy of their response: off

Limit to 1 response

Presentation
Manage how the form and responses are presented

Defaults

Form defaults
Settings applied to this form and new forms

This option collects emails, we want that for every form, every time.

Questions **Responses** Settings

0 responses

 Link to Sheets

Accepting responses

Waiting for responses

Click on **Link to Sheets** in the responses tab, then **Create a new spreadsheet**

Select destination for responses

Create a new spreadsheet Automating Email Example (R... [Learn More](#)

Select existing spreadsheet

Cancel

Create

Since we will be using Zapier to automate this functionality, we will need to have a response before we move on.

Zapier does not interact with forms that do not have a response key, as the trigger for the zap is the form being filled out, we have to pre-fill the form before we automate it.

Automating Email Example (Responses) ☆ 🗂️ 🔗

File Edit View Insert Format Data Tools Extensions Help

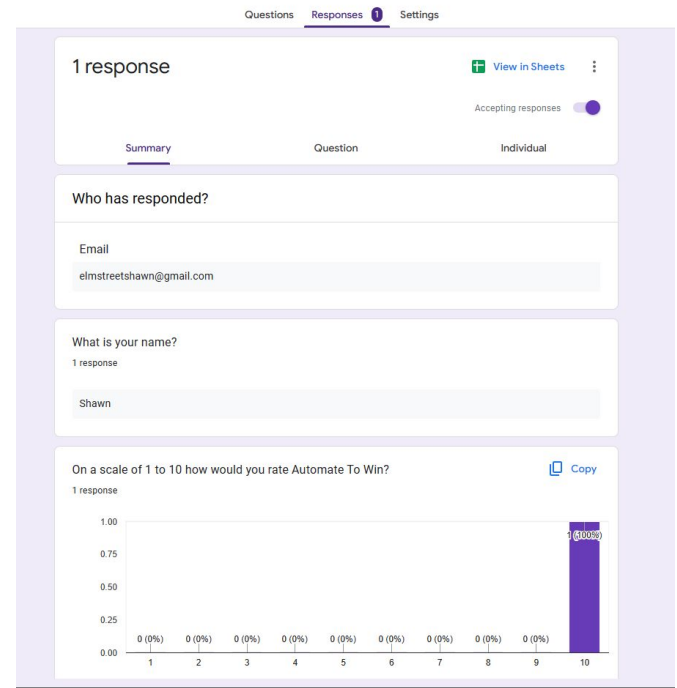
100% 123 Default...

A1 *fx* Timestamp

	A	B	C	D	E	F
1	Timestamp	Email Address	What is your name?	On a scale of 1 to 10 how would you rate Automate To Win?		
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						

ZAPIER DOES NOT INTERACT WITH BLANK SHEETS
OR FORMS WITHOUT ANY DATA.

IN ORDER FOR YOU TO BE ABLE TO INTERACT
WITH YOUR FORM



**YOU MUST FILL OUT YOUR FORMS FIRST
BEFORE ZAPIER WILL WORK**

To get the URL for your form, click send and then the link button middle top





Questions Responses Settings

0 responses

Waiting for responses

Send form

Collect email addresses Responder input

Send via   **Click**  

Link

<https://docs.google.com/forms/d/e/1FAIpQLScg4o2V9jqbLXz3nACxdQBBKjsWgPqW>

Shorten URL

Cancel **Copy**

Automating Email Example

This is a form example for lesson 6 of automate to win

automatetowin@gmail.com [Switch account](#)

* Indicates required question

Email *

Your email

What is your name? *

Your answer

On a scale of 1 to 10 how would you rate Automate To Win? *

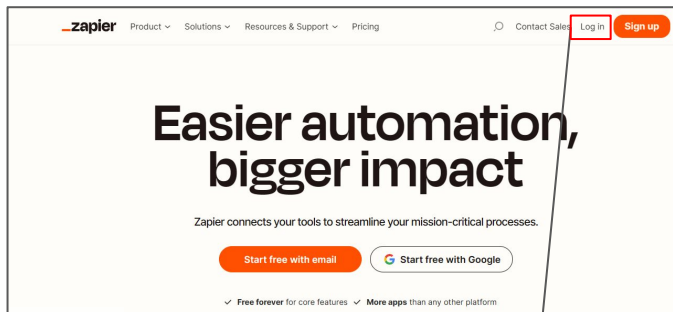
1 2 3 4 5 6 7 8 9 10

Horrible Amazing

Submit Clear form

Never submit passwords through Google Forms.

Paste the URL into your browser and actually fill out the form



Now, log into Zapier and select the trigger and first action.

Set the variables as you see on the screen shot

Forms <> Gmail

New Form Response <> Send Email

Then click “Try it”

Make a Zap

Connect this app...



with this one!

When this happens...



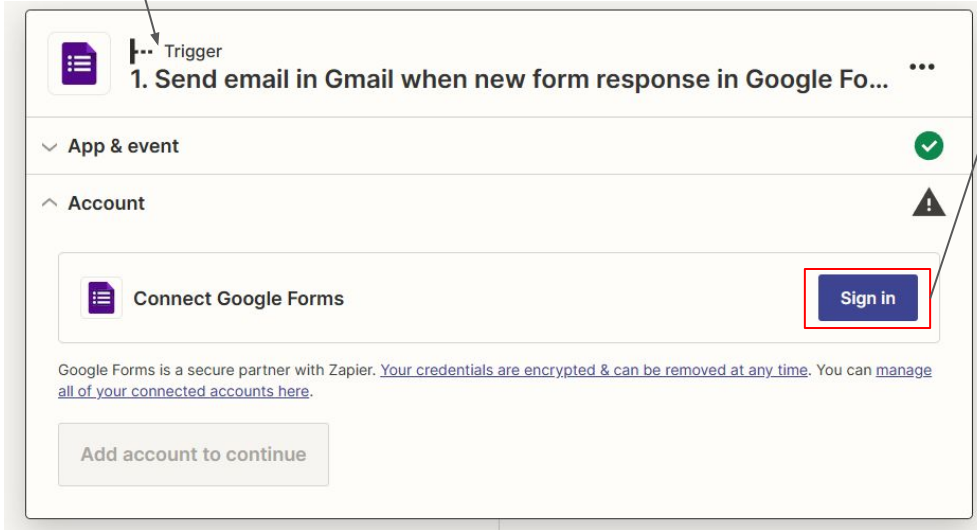
then do this!



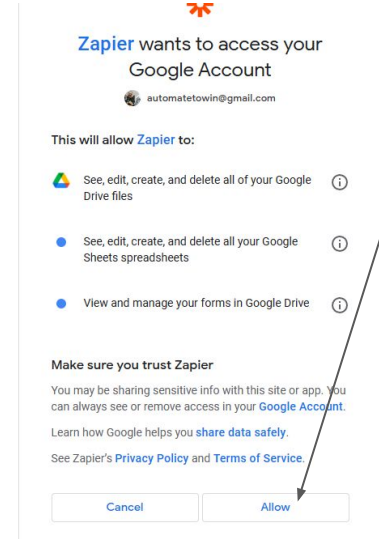
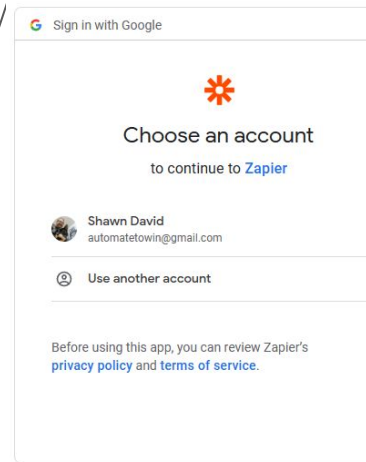


You will be brought to the main 'zapier' U.I.
Click into the trigger where it says "Send email in Gmail"

Zapier allows you to 'sign in' to any of the tools they use, making it easy to connect all the tools you have which are supported by Zaps.

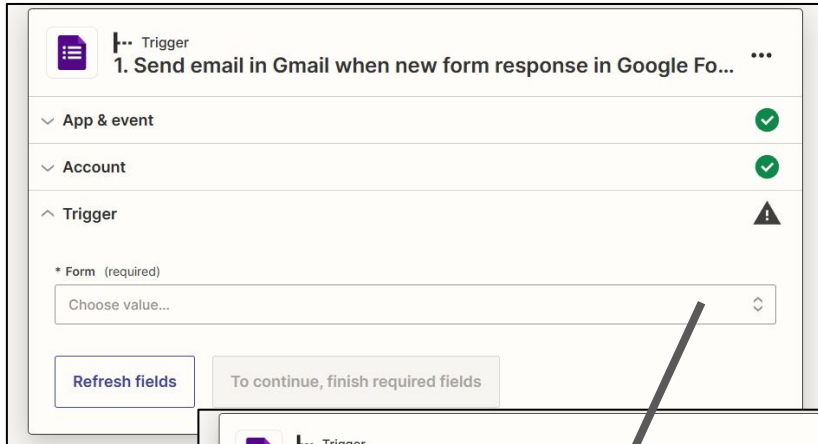


Click sign in and follow the prompts and click allow



Once you have connected your google account, you can then select the form that you want to trigger your zap.

Then hit continue



Trigger

1. Send email in Gmail when new form response in Google Fo... ⋮

App & event ✓

Account ✓

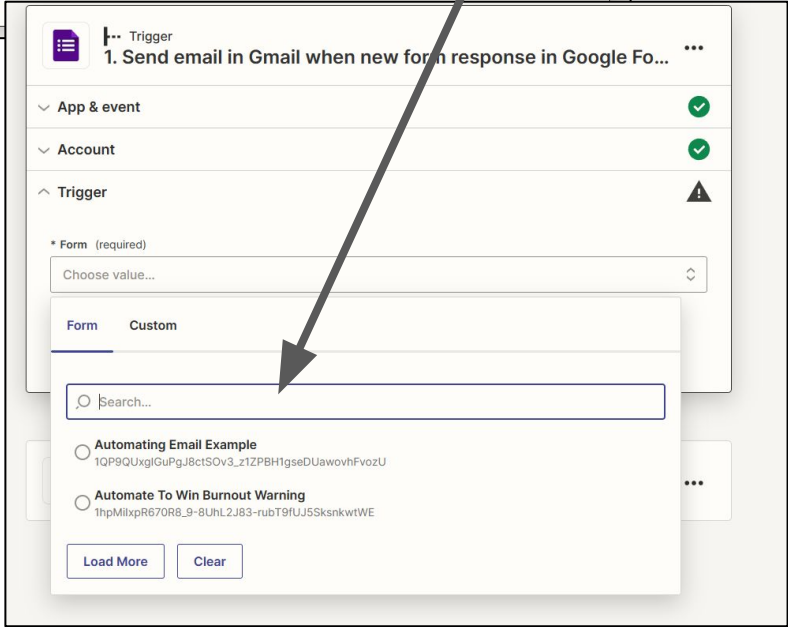
Trigger ⚠

* Form (required)

Choose value...

Refresh fields

To continue, finish required fields



Trigger

1. Send email in Gmail when new form response in Google Fo... ⋮

App & event ✓

Account ✓

Trigger ⚠

* Form (required)

Choose value...

Form Custom

Search...

- Automating Email Example
1QP9QUxglGuPgJ8ctSOv3_z1ZPBH1gseDUawovhFvozU
- Automate To Win Burnout Warning
1hpMilxpR670R8_9-8UHL2J83-rubT9tUJ5SksnkwTWE

Load More Clear




Trigger

* Form (required)



Automating Email Example

Refresh fields


Continue

 Trigger
1. Send email in Gmail when new form response in Google Fo... ...

App & event ✓
Account ✓
Trigger ✓
Test ⚠

 → 

Test your trigger

We started collecting form responses in your  automatetowin@gmail.com account. We'll find the most recent one to confirm your trigger is set up correctly. If no form responses are found, you'll need to create one.

Test trigger

The next step you will see is to test the trigger.

You must test every step in a zap to make sure there is data being sent from all triggers and actions.

This will not work unless you have already had a response to the form

Once you test the trigger, you will be able to select the form output that you have previously filled. This is why you need to form fill before you zap, so there is data for Zapier to find.

Once you find your record, click continue

Test ✓

✓ We found a form response in your Google Forms account. We will load the 3 most recent form responses not previously shown, if available. [Learn more about test data.](#)

Search

<input checked="" type="radio"/> Form Response B original record pulled on Jul 10, 2023	<code>responselId</code> ACYDBNIHtsm1TKEKK_BHyQdLFghQT1mfxMlbr4a40EyzD_3VC <code>createTime</code> 2023-07-10T10:50:15.091Z <code>lastSubmittedTime</code> 2023-07-10T10:50:15.091950Z
<input type="radio"/> Form Response A original record pulled on Jul 10, 2023	<code>respondentEmail</code> elmstreetshawn@gmail.com <code>id</code> ACYDBNIHtsm1TKEKK_BHyQdLFghQT1mfxMlbr4a40EyzD_3V01nG6yCC <code>7711b681</code> 10 <code>3ae4421b</code> Shawn

Find new records

Continue with selected record

Close

2. Send Email in Gmail

App & event

Account

This auth is expired. [Please reconnect it here.](#)

Gmail automatetowin@gmail.com
automatetowin@gmail.com • Used in 2 Zaps

Change

Gmail is a secure partner with Zapier. Your credentials are encrypted & can be removed at any time. You can [manage all of your connected accounts here.](#)

Add account to continue

Now you will have to connect your gmail to Zapier just like you connected your Google Forms API.

Every function within Google will need to be authorized independently as you use them for security.

As you can see, the auth needs to be refreshed, but its a simple click.

Sign in with Google

Choose an account
to continue to Zapier

Shawn David
automatetowin@gmail.com

Use another account

To continue, Google will share your name, email address, language preference, and profile picture with Zapier. Before using this app, you can review Zapier's [privacy policy](#) and [terms of service](#).

Sign in with Google

Zapier wants to access your Google Account

automatetowin@gmail.com

This will allow Zapier to:

- Manage drafts and send emails
- Read, compose, and send emails from your Gmail account

Make sure you trust Zapier

You may be sharing sensitive info with this site or app. You can always see or remove access in your [Google Account](#). Learn how Google helps you [share data safely](#). See Zapier's [Privacy Policy](#) and [Terms of Service](#).

Cancel Allow

2. Send Email in Gmail

App & event

Account

Gmail automatetowin@gmail.com #3
automatetowin@gmail.com • Used in 2 Zaps

Change

Gmail is a secure partner with Zapier. Your credentials are encrypted & can be removed at any time. You can [manage all of your connected accounts here.](#)

Continue

Action

1. Action
 2. Send Email in Gmail

App & event ✓
 Account ✓
 Action ⚠

To

Who will this email be sent to? Multiple email addresses can be entered either individually, or as a comma separated... [more](#)

Cc

Who should be cc'd on this email? Multiple email addresses can be entered either individually, or as a comma... [more](#)

Bcc

Who should be bcc'd on this email? Multiple email addresses can be entered either individually, or as a comma... [more](#)

From

Choose value...

Select an email address to send from your Gmail Account. Defaults to the primary email address.

From Name

Enter text or insert data...

Reply To

Specify a single reply address other than your own.

* Subject (required)

Enter text or insert data...

Body Type

plain

if using the HTML option, you must add any and all formatting (paragraphs, lists, etc) directly using HTML. [Learn more.](#)

* Body (required)

Enter text or insert data...

Signature

Choose value...

Include a default signature with the email? Will be placed at end of the message after a line break and another "... in..." [more](#)

Label/Mailbox

Choose value...

Attachments

Enter text or insert data...

A file to be attached. Can be an actual file or a public URL, which will be downloaded and attached.

[Refresh fields](#)
[To continue, finish required fields](#)

Now you will be presented with all the variables you can send in the email. The variables you must fill are; The rest are optional.

To
From
From Name
Subject
Body

To

Enter text or insert data... type here or click below

Insert Data ...

Search all available fields

- 1. Send email in Gmail when new form response in Google Forms
- Respondent Email elmstreetshawn@gmail.com**
- Create Time 2023-07-10T10:50:15.091Z
- Last Submitted Time 2023-07-10T10:50:15.091950Z
- ID ACYDBNiHtsm1TkeKK_BHyQdLFghQT1mfxMlbr4a40EyzD_3V01nG6yCQri6LolxpGK1er9E
- Score Formatted
- Response Id ACYDBNiHtsm1TkeKK_BHyQdLFghQT1mfxMlbr4a40EyzD_3V01nG6yCQri6Lolx... [more](#)

When you click into a variable like "to" you have two options.

1. You will be presented with a dropdown of all the variables that have been sent into the zap from previous steps.
2. You can type directly into the text box

Since we want to send this email to the respondent, choose that variable.

Who should be bcc'd on this email? Multiple email addresses can be entered either individually, or as a comma... [more](#)

* Subject (required)

Enter text or insert data...

From

automatetowin@gmail.com

Select an email address or alias from your Gmail Account. Defaults to the primary email address.

From Name

Automate to Win

Reply To

Enter text or insert data...

Specify a single reply address other than your own.

* Subject (required)

Thank you for your response and rating,  1. What is your name?: Shawn

Body Type

plain

If using the HTML option, you must add any and all formatting (paragraphs, lists, etc) directly using HTML. [Learn more.](#)

* Body (required)

Enter text or insert data...

Signature

Choose value...

Include a default signature with the email? Will be placed at end of the message after a line break and another "--" lin... [more](#)

Label/Mailbox

Choose value...

You can also mix and match text and variables, like the example in the “subject line”

I typed “Thank you for your response and rating,” and then I selected the “Whats your name” variable from the form input.

This will send

“Thank you for your response and rating, Shawn.”

Mixing and matching text and variables is an especially useful way to personalize things like this email or asset creation.

For the body of the email, again I mix and match text and variables.

Dear, {{respondentEmail}}

Thank you for your recent rating of our Automate to Win Course!

You scored us: {{score}} out of 10.

We appreciate your feedback and thank you for being our customer.

Once you are happy with your email body, click continue, then test action

The screenshot displays a workflow editor interface. At the top, a text box labeled '* Body (required)' contains the email body text: "Dear, [1. Respondent Email: elmstreetshawn@gmail.com]", "Thank you for your recent rating of our Automate to Win Course!", "You scored us: [1. Score scale of 1...utomate To Win?: 10] out of 10.", and "We appreciate your feedback and thank you for being our customer,". Below this is an "Insert Data ..." dropdown menu with a search bar and a list of available fields: "1. Send email in Gmail when new form response in", "Score Formatted", "Response Id ACYDBNIHtsm1TkeKK_BHyQdLFghQT1mfxMI", "Max Possible Score", "Total Score", "What is your name? Shawn", and "On a scale of 1 to 10 how would you rate Automate to Win". To the right, a "Send Send Email to Gmail" action is configured with a search bar for item data and a preview of the email body. The preview shows the same text as the main editor, with variables like "body_type", "cc", "from", "from_name", "subject", "to", and "1" highlighted. Below the preview, there are "Empty fields:" such as "Bcc", "Reply To", "Signature", "Label/Mailbox", and "Attachments", each with an "empty (optional)" label. At the bottom, there are two buttons: "Skip test" and "Test action", with the "Test action" button highlighted by a red box.

Skip test Test action

After a successful test you will see this screen, click publish

2. Send Email in Gmail

App & event ✓

Account ✓

Action ✓

Test ✓

Send Send Email to Gmail
We'll use this as a sample for setting up the rest of your Zap.

A Send Email was sent to Gmail about 37 seconds ago

Search item data...

```
id 1893f90239067f8f
threadid 1893f90239067f8f
labelids
1 SENT
```

Retest action **Publish**

Close

Your Zap is on!

Transfer existing data, then create a Form Response in Google Forms to try it out.

Go to My Zaps Transfer existing data

Thank you for your response and rating, Shawn Inbox x

Automate to Win
to me

Dear, elmstreetshawn@gmail.com

Thank you for your recent rating of our Automate to Win Course!
You scored us: 10 out of 10.
We appreciate your feedback and thank you for being our customer.ACYDBNiHtsm1TtEKK_BHyQdLFghQT1mfxMlbr4a40EyzD_3V01nG6yCQri6LolxpGK1er9E

Reply Forward

And you are done!

Congratulations!

You have created your first automation!!!!

