

Zapier Integration Steps With myQuest:

Step 1:

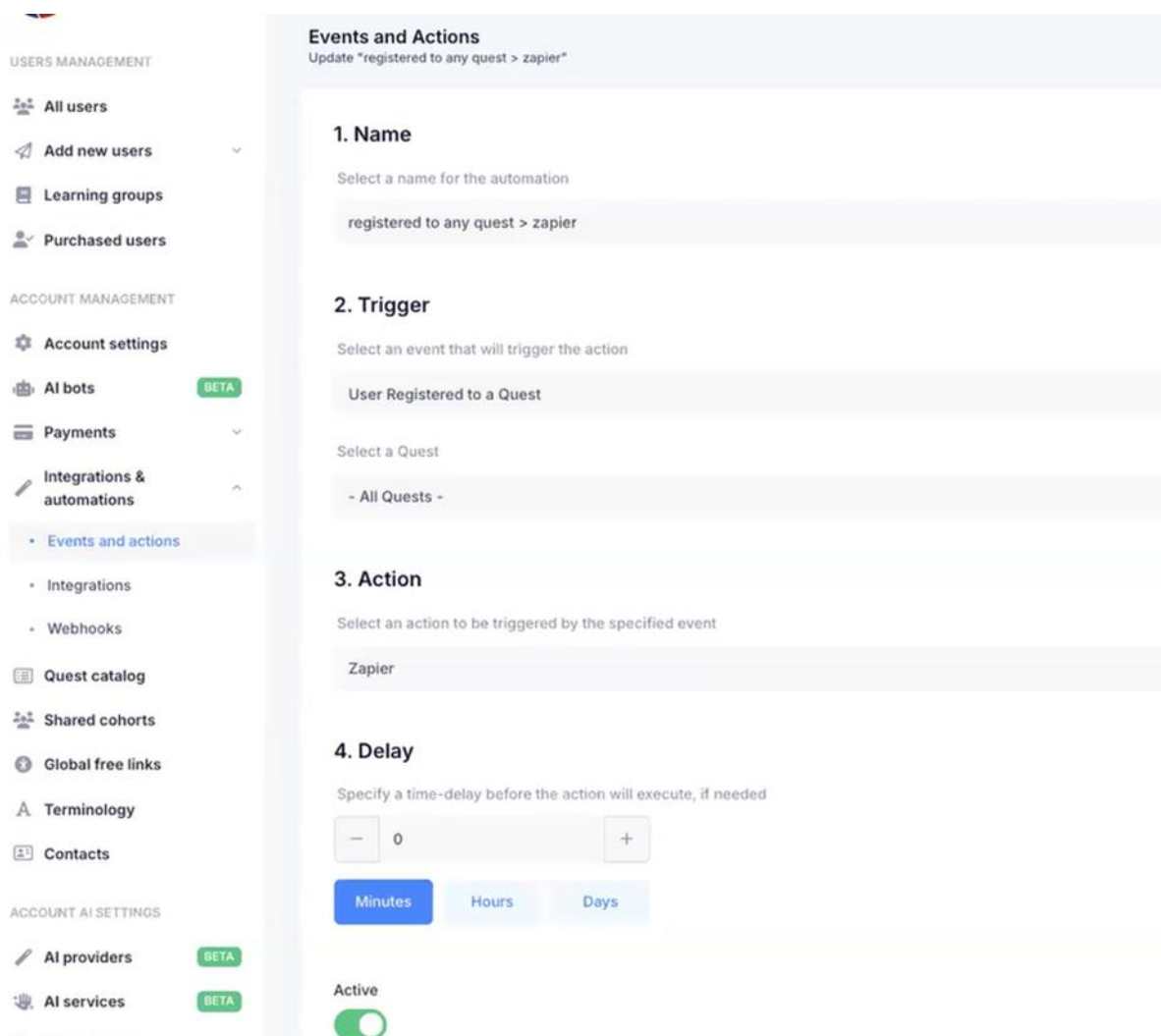
Go to the myQuest Admin Portal

Under Account Management > integrations and automations > events & actions.

Press “+ new” in the top right corner.

Set up all the events you need to be sent to Zapier (each one is a new event).

Make sure the action to select is Zapier.



The screenshot shows the 'Events and Actions' configuration page in the myQuest Admin Portal. The left sidebar contains a navigation menu with sections: 'USERS MANAGEMENT' (All users, Add new users, Learning groups, Purchased users), 'ACCOUNT MANAGEMENT' (Account settings, AI bots, Payments, Integrations & automations), 'Quest catalog', 'Shared cohorts', 'Global free links', 'Terminology', 'Contacts', and 'ACCOUNT AI SETTINGS' (AI providers, AI services). The 'Integrations & automations' section is expanded, showing 'Events and actions' as the selected option. The main content area is titled 'Events and Actions' with a subtitle 'Update *registered to any quest > zapier*'. It contains four sections: 1. Name (Select a name for the automation, with a dropdown showing 'registered to any quest > zapier'), 2. Trigger (Select an event that will trigger the action, with a dropdown showing 'User Registered to a Quest' and a 'Select a Quest' dropdown showing '- All Quests -'), 3. Action (Select an action to be triggered by the specified event, with a dropdown showing 'Zapier'), and 4. Delay (Specify a time-delay before the action will execute, if needed, with a numeric input set to 0 and buttons for Minutes, Hours, and Days). At the bottom, there is an 'Active' toggle switch that is currently turned on.

Step 2:

Open a Zapier account if you don't already have one.

Ask your Project Manager for an API key (save this for later use).

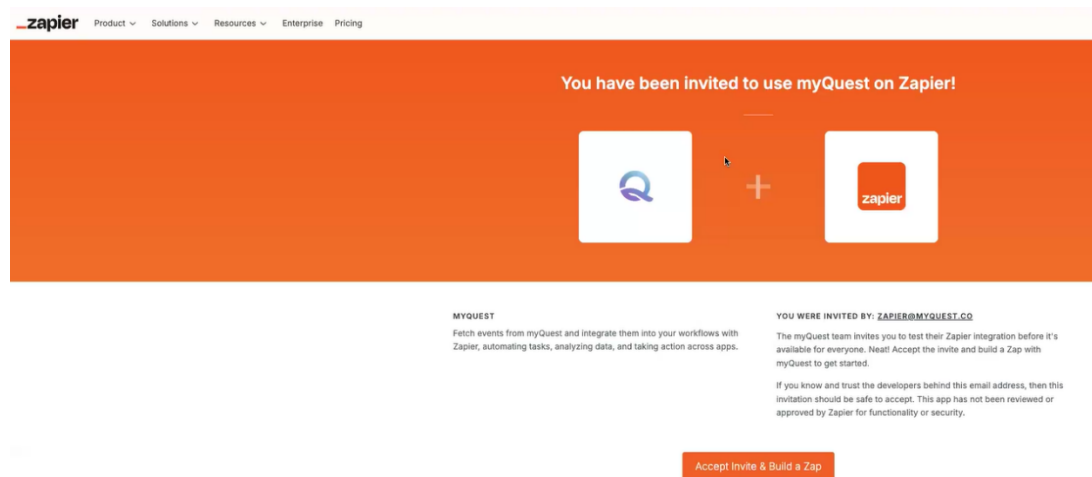
Step 3:

Use this invitation link to join myQuest to Zapier.

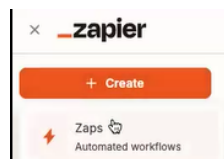
<https://zapier.com/developer/public-invite/218988/30e1decee4422d10a86ee718f9710b6b/>

You will see the screen below:

Press “accept invite & build a zap”.

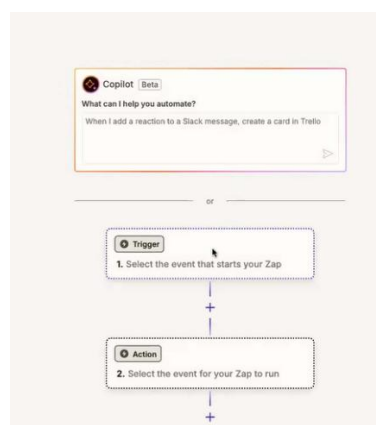


Then press “+create”

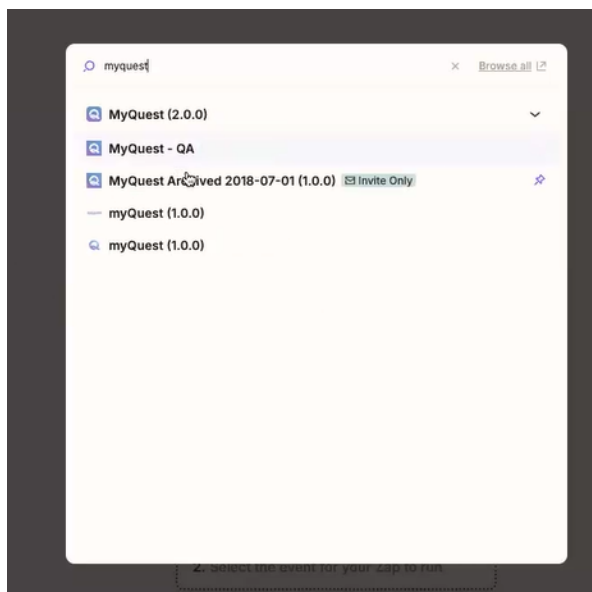


Step 4:

Press the trigger block



Search for myQuest

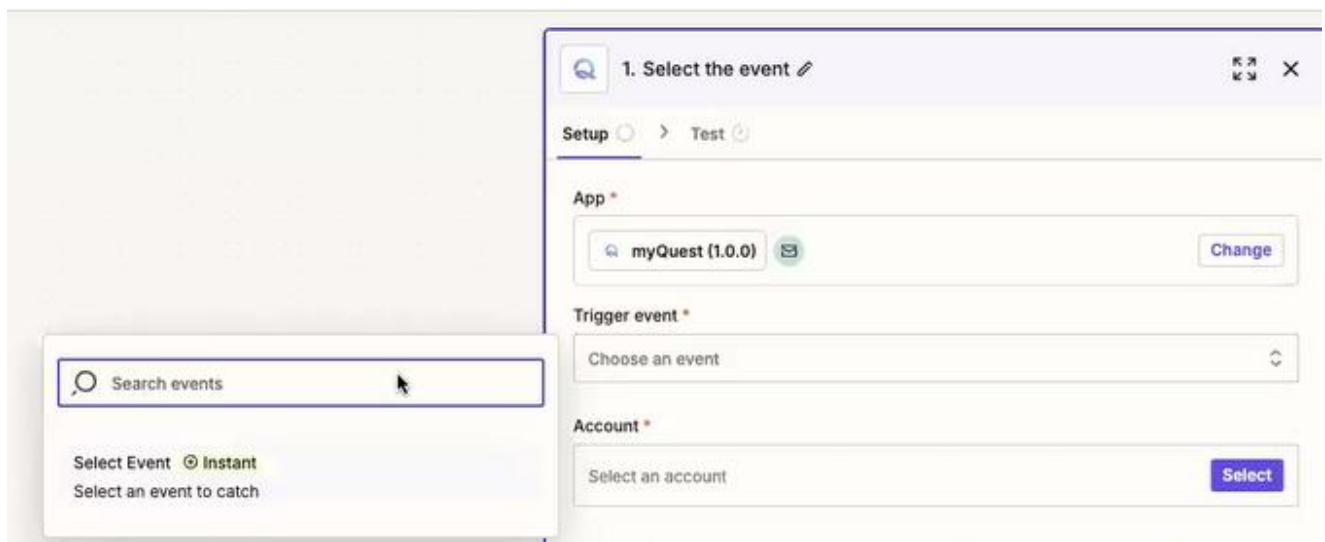


Select myQuest (1.0.0) with our logo (bottom option).

**You may also see one that says MyQuest (2.0.0) if you used our old rule engine – ignore this.*



Under Trigger Event > click “select event”



Under Account > click “+ connect a new account”

Step 5:

You will be asked to enter an API Key > enter the API key your Project Manager gave you.

Then click “Yes, Continue to myQuest (1.0.0)”.

The screenshot shows a modal window titled "Allow Zapier to access your myQuest (1.0.0) Account?". Below the title, it says "API KEY (required)" in red. A message follows: "Please reach out to your account manager to obtain your API key". There is a large, empty white text input field. At the bottom, there are two buttons: a red button labeled "Yes, Continue to myQuest (1.0.0)" and a grey button labeled "Cancel".

Step 6:

Then click the Account button again and select myQuest (1.0.0).

The screenshot shows the Zapier configuration interface for "1. Select Event in myQuest (1.0.0)". The "Setup" tab is active, showing a progress bar with "Setup" (green checkmark), "Configure" (grey circle), and "Test" (grey circle). Below the progress bar, there are three sections: "App" with a dropdown menu showing "myQuest (1.0.0)" and a "Change" button; "Trigger event" with a dropdown menu showing "Select Event" and a "Change" button; and "Account" with a dropdown menu showing "myQuest (1.0.0) #3" and a "Change" button. At the bottom, there is a note: "myQuest (1.0.0) is a secure partner with Zapier. Your credentials are encrypted and can be removed at any time. You can manage all of your connected accounts here."

Then click “continue”

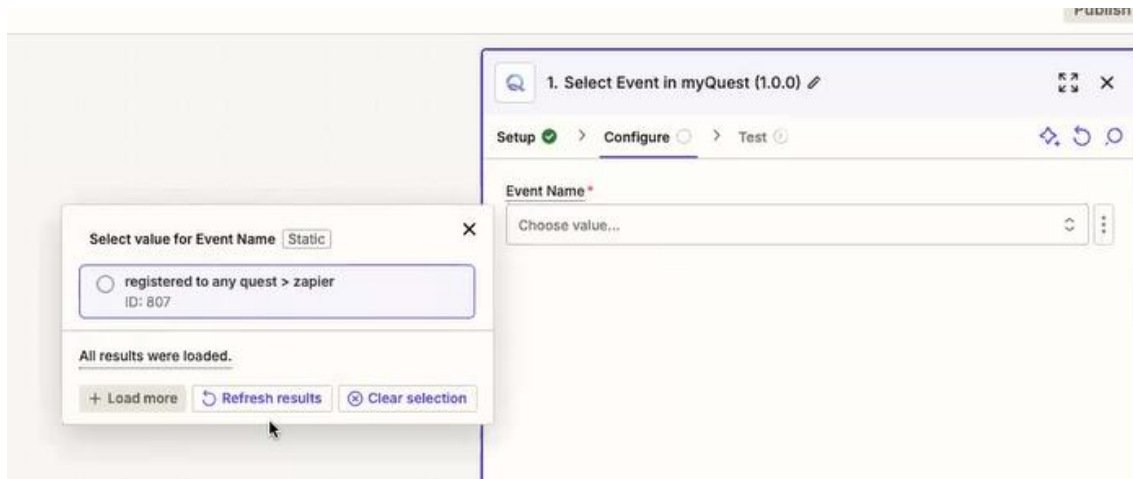
The screenshot shows a single blue button with the text "Continue" in white, centered within a light blue rectangular frame.

Step 7:

Click Event name > Select an event.

The events that you see in this list are ALL events & action you created in myQuest and select the action to be Zapier.

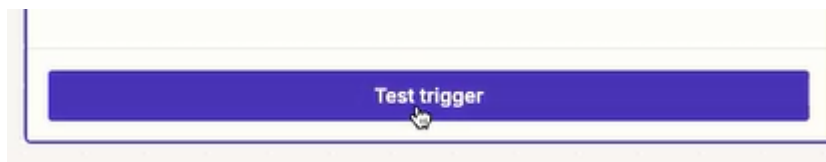
You may need to click “refresh results” to see the new ones you just created.



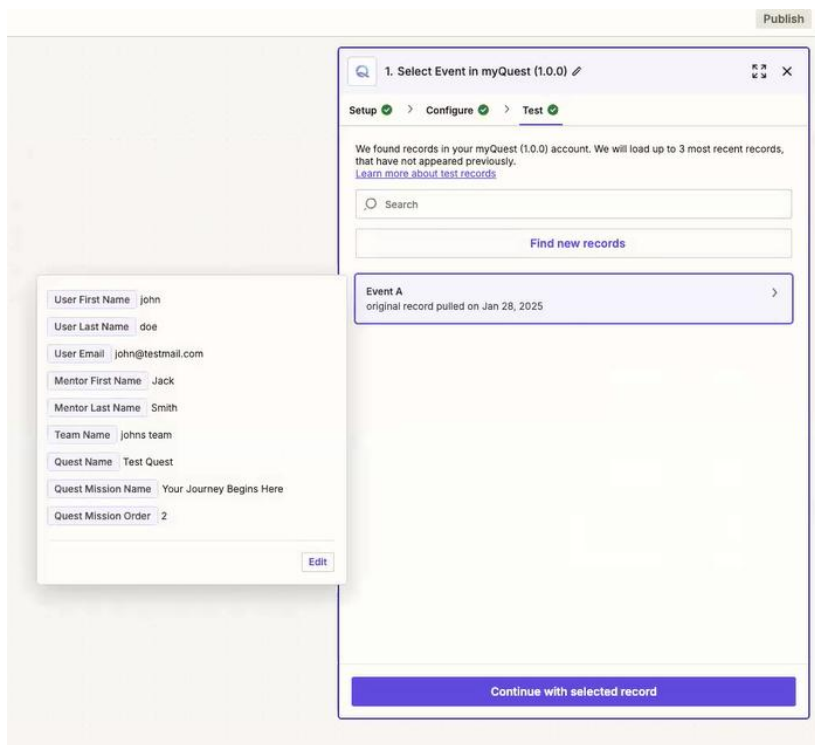
Click continue



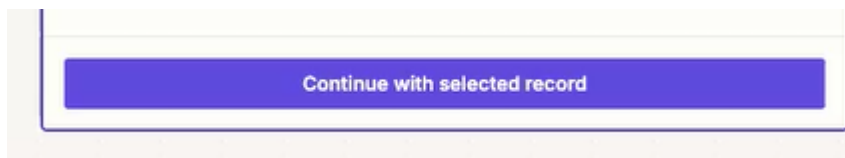
Click test trigger



Here you will see some data and what fields you will get that is sent form myQuest

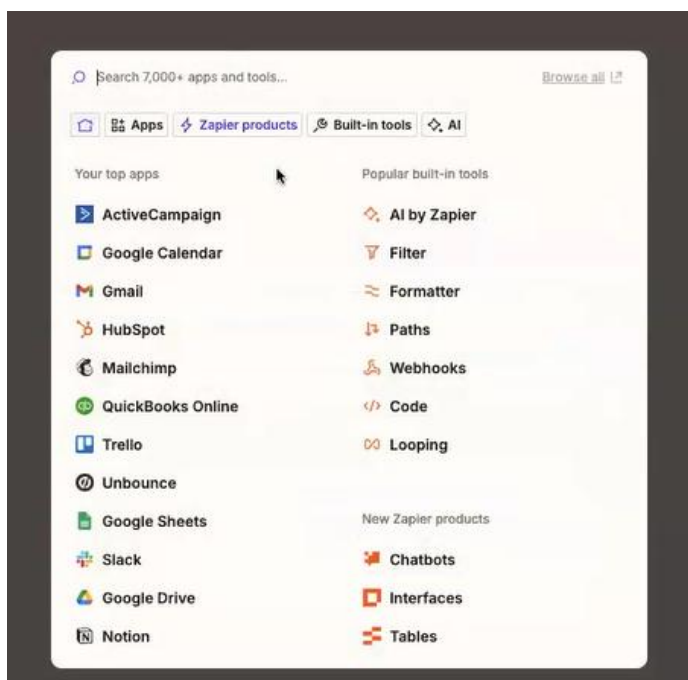


Click continue with selected record



Step 8:

Then you can search for the app you wish to use (Mailchimp, email, CRM etc).



This is where the myQuest integration setup ends. You can now continue creating your Zap.



For example: if you wanted to send an email > you could press the + sign in to To section and select a relevant field from the data provided like User Email.

The screenshot shows the Zapier interface with the 'Email by Zapier' step selected. The 'To' field is being configured, and a dropdown menu is open showing 'Copilot suggestions' and a list of fields from the 'myQuest (1.0.0)' integration. The 'User Email' field is highlighted. The right sidebar shows the configuration options for the 'Email by Zapier' step, including 'To', 'Subject', 'Body', 'Attachment', and 'From Name'.

myQuest (1.0.0)

1. Select Event

2. Send Outbound Email

Insert data for To Dynamic

Search

Copilot suggestions (Beta)

1. Select Event in myQuest (1.0.0)

- Quest Mission Name Your Journey Begins Here
- Quest Name Test Quest
- Team Name Johns team
- User First Name John
- User Last Name doe
- Event Id
- Quest Mission Order 2
- User Email john@testmail.com**

2. Send Outbound Email in Email by Zapier

Setup > Configure > Test

Trial or Free Zapier plan:

- Emails sent during testing are sent to the Zapier account email address. Once published, emails go to the intended recipients (To, CC, BCC).
- You can send a maximum of 5 emails per account per day.

Paid Zapier plan:

- You can send a maximum of 10 emails per account per hour.

To *

Subject *

Enter text or insert data...

Body (HTML or Plain) *

Enter text or insert data...

Enter a valid value

Attachment

Enter text or insert data...

From Name

Enter text or insert data...

To continue, finish required fields