

## Zapier Integration Steps With myQuest:

### **Step 1:**

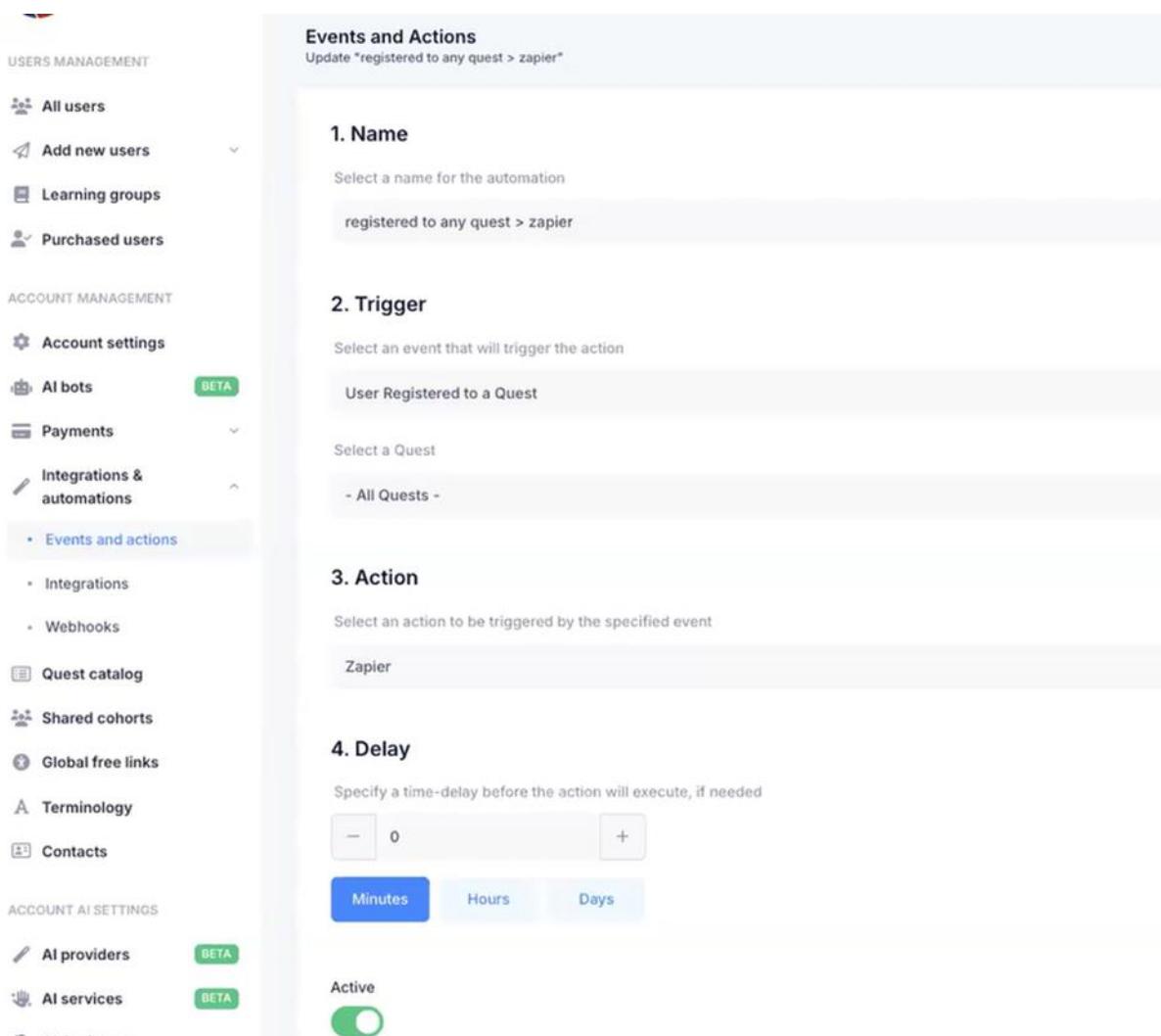
Go to the myQuest Admin Portal

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' setup in the myQuest Admin Portal. The left sidebar lists 'USERS MANAGEMENT' (All users, Add new users, Learning groups, Purchased users), 'ACCOUNT MANAGEMENT' (Account settings, AI bots, Payments, Integrations & automations, Events and actions, Integrations, Webhooks, Quest catalog, Shared cohorts, Global free links, Terminology, Contacts), and 'ACCOUNT AI SETTINGS' (AI providers, AI services). The 'Events and Actions' section is selected under 'Integrations & automations'. The main area shows the following steps:

- 1. Name:** 'registered to any quest > zapier'
- 2. Trigger:** 'User Registered to a Quest' (under 'Select an event that will trigger the action').
- 3. Action:** 'Zapier' (under 'Select an action to be triggered by the specified event').
- 4. Delay:** '0' (under 'Specify a time-delay before the action will execute, if needed').

### **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).

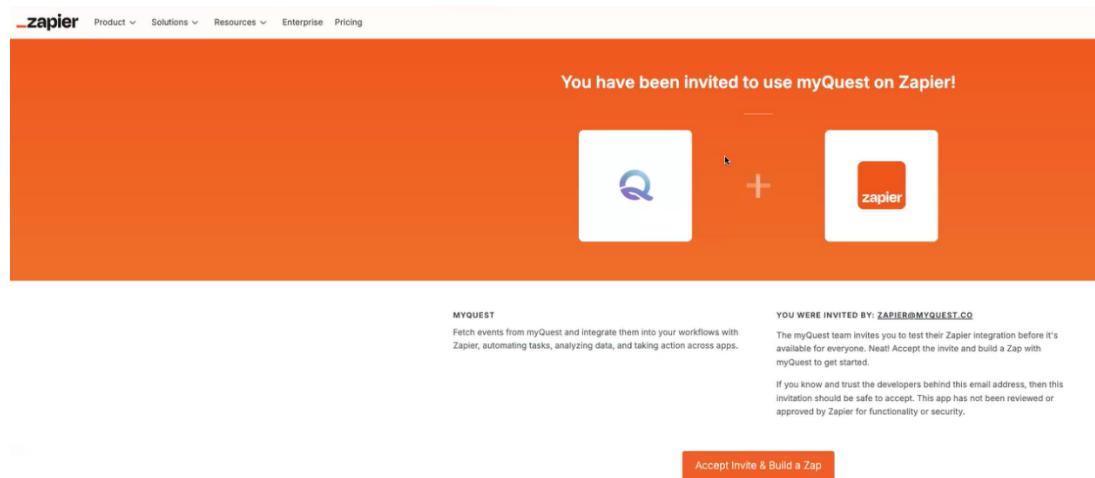
### Step 3:

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”.

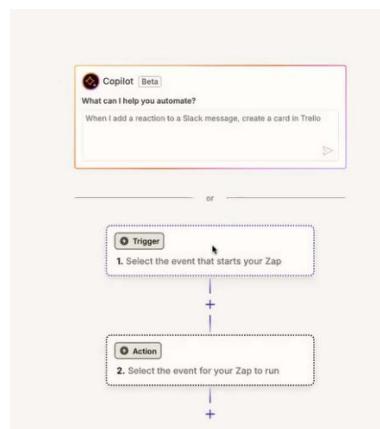


Then press “+create”

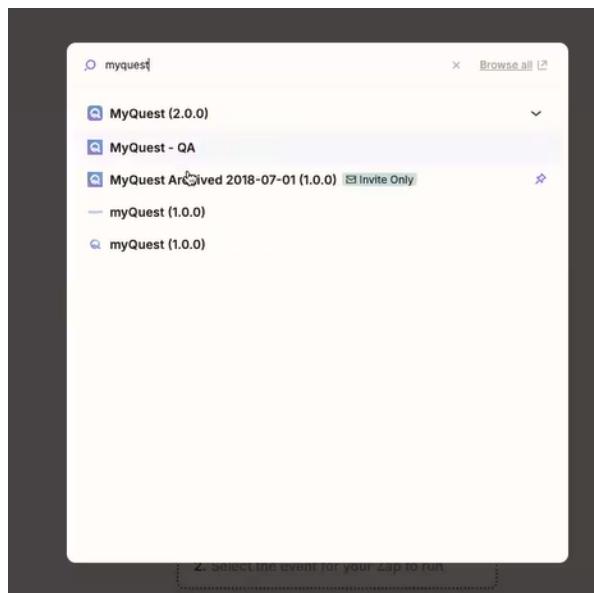


### Step 4:

Press the trigger block



Search for myQuest

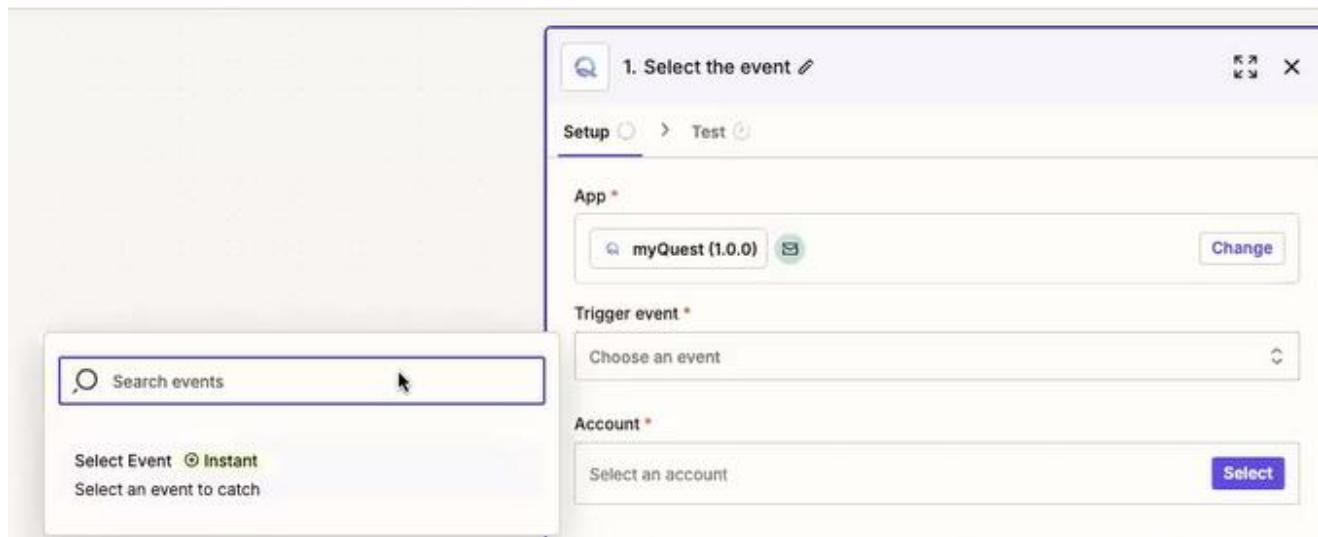


Select myQuest (1.0.0) with our logo (bottom option).

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

 myQuest (1.0.0)

Under Trigger Event > click “select event”

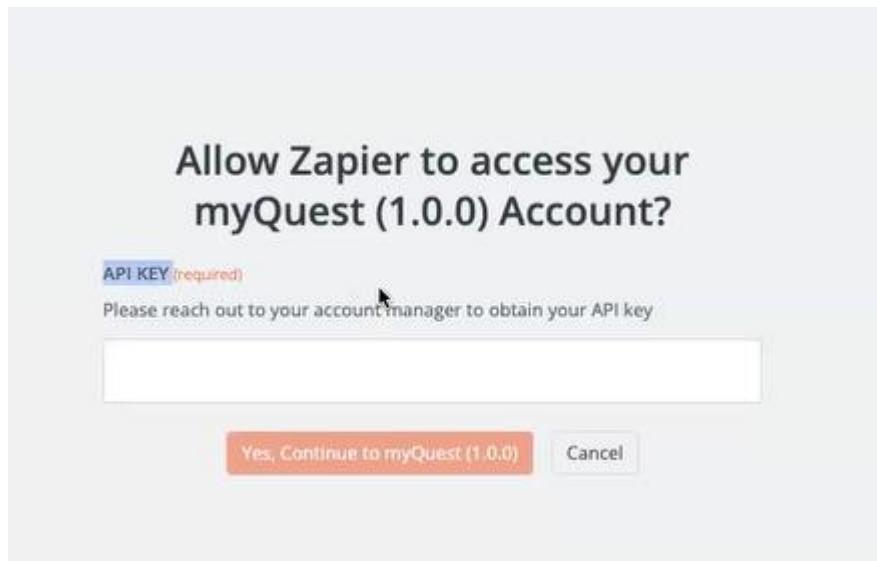


Under Account > click “+ connect a new account”

## Step 5:

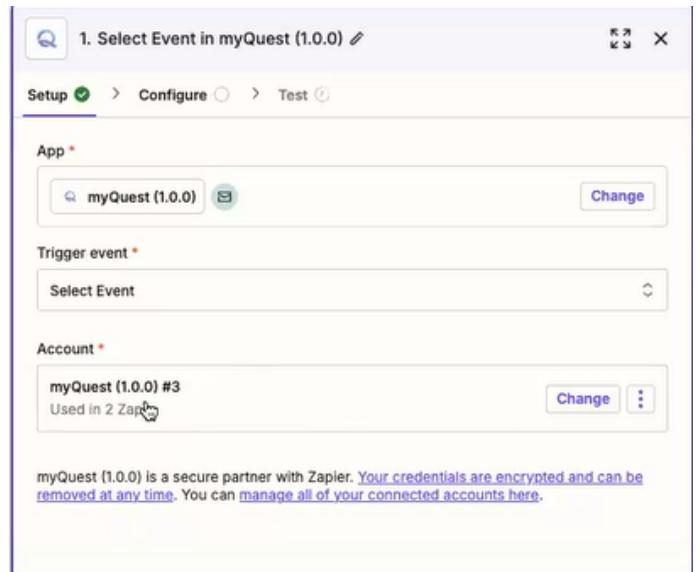
You will be asked to enter an API Key > enter the API key your Project Manager gave you.

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



## Step 6:

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



Then click “continue”

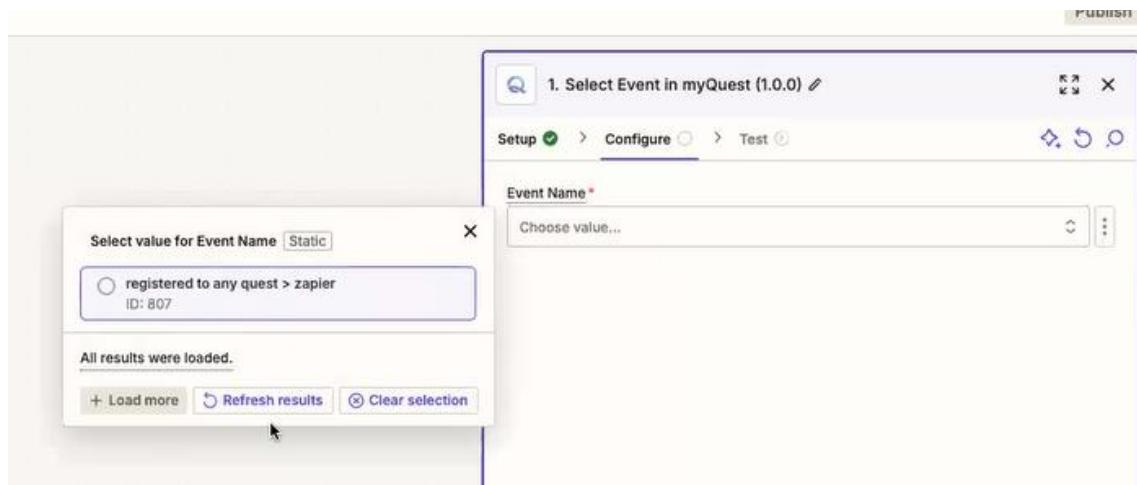


## Step 7:

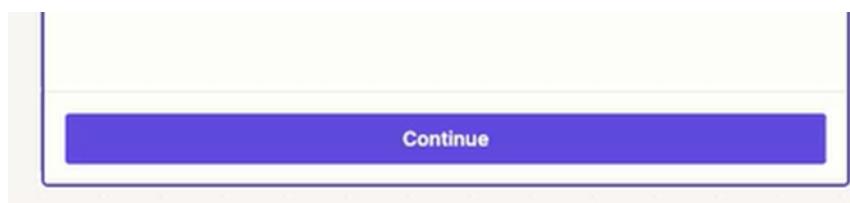
Click Event name > Select an event.

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.



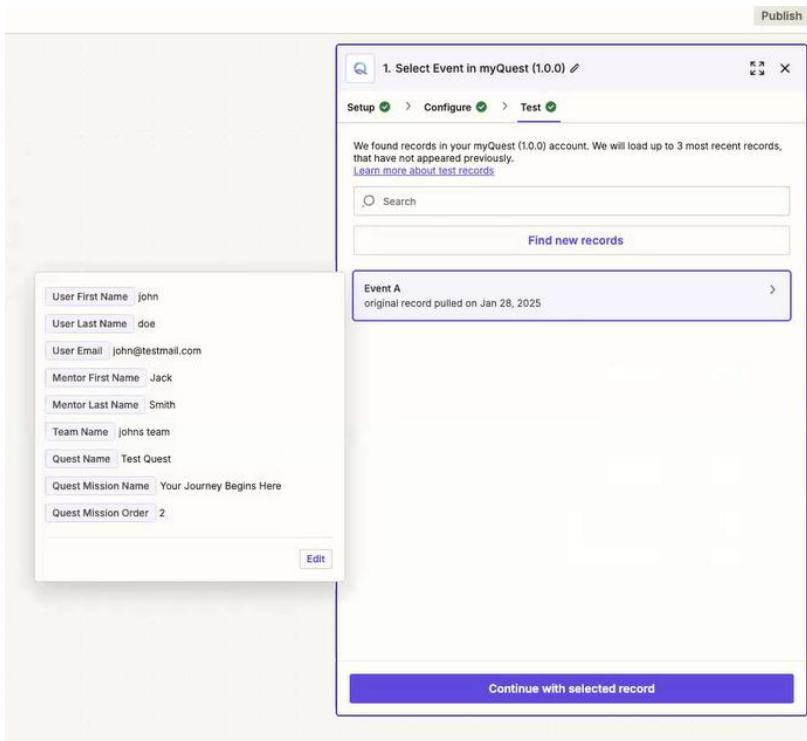
Click continue



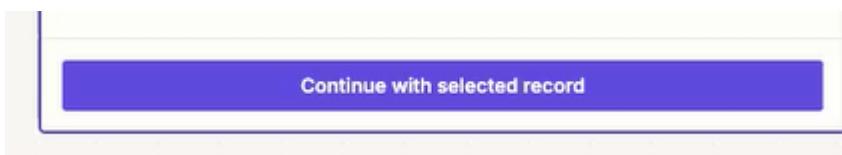
Click test trigger



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

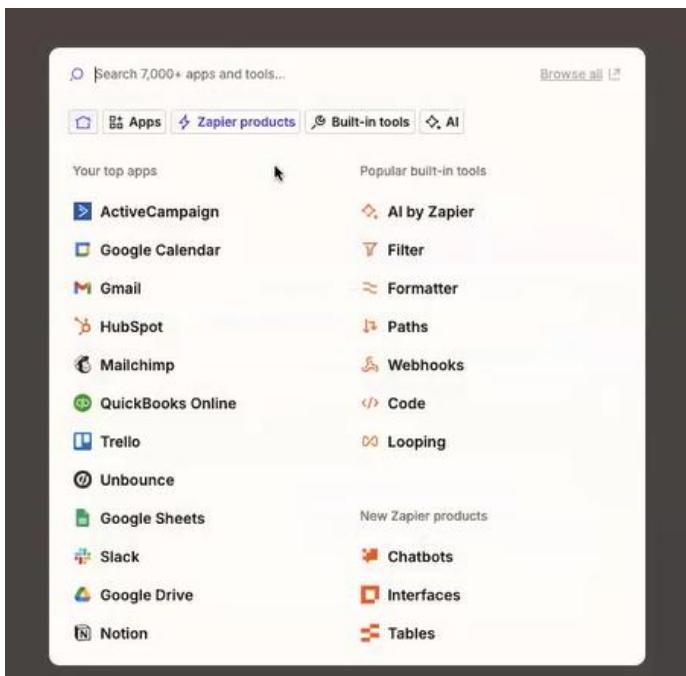


Click continue with selected record



## 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 integration setup for myQuest, specifically the 'Send Outbound Email' step. The 'To' field is highlighted, showing a dropdown menu with 'Copilot suggestions' and a list of data fields: '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', and 'User Email john@testmail.com'. The 'To' field is empty. The 'Subject' and 'Body (HTML or Plain)' fields are also visible, with the latter showing an error message: 'Enter a valid value'. A note at the bottom right says 'To continue, finish required fields'.