

# Automation Cheat Sheet

This sheet is designed to be used with [Zapier University courses](#). However, it can be helpful for mapping out automations (we call them Zaps) at any time.

First, list out your repetitive tasks. The more specific, the better!


Next, use this framework to map out the automation:

When this happens \_\_\_\_\_

Then, do this \_\_\_\_\_

And this \_\_\_\_\_

And this \_\_\_\_\_

And this \_\_\_\_\_

“When” is the trigger, and it’s what kicks off your automation. “Then” is the action—what you want your automation to do. For example: **When** a new lead fills out my form, **then** add the lead to my mailing list. Note: a Zap can have only one trigger but up to 100 actions!

Ask yourself these questions as you go:

- What is the problem you want to solve?
- What apps will you use?
- Write out your desired automation using WHEN/DO logic.
- Where in the apps do you expect the data to appear?

# Automation Cheat Sheet

This sheet is designed to be used with [Zapier University courses](#). However, it can be helpful for mapping out automations (we call them Zaps) at any time.

Sometimes, you might only want certain information to pass through your Zap.  
Enter: [Filters](#). Follow this framework:

When this happens \_\_\_\_\_

If \_\_\_\_\_

Then do this \_\_\_\_\_

And this \_\_\_\_\_

And this \_\_\_\_\_

For example: **When** a new lead fills out my form, **if** their email address does not end in @zapier.com, **then** add the lead to my "warm leads" mailing list.

Similar to Filters, [Paths](#) allow multiple events to happen depending on the information received. Follow this framework:

When this happens \_\_\_\_\_

## Path A

If \_\_\_\_\_

Then do this \_\_\_\_\_

## Path B

OR If \_\_\_\_\_

Then do this \_\_\_\_\_

For example, one path could be: **When** a new lead fills out my form, **if** their email address does NOT end in @zapier.com, **then** add the lead to my "warm leads" mailing list. Another path could be: **When** a new lead fills out my form, **if** their email address does end in @zapier.com, **then** add the lead to my "teammates" mailing list.