



# TECHSHOW2020

## Google Forms and Zapier Workshop

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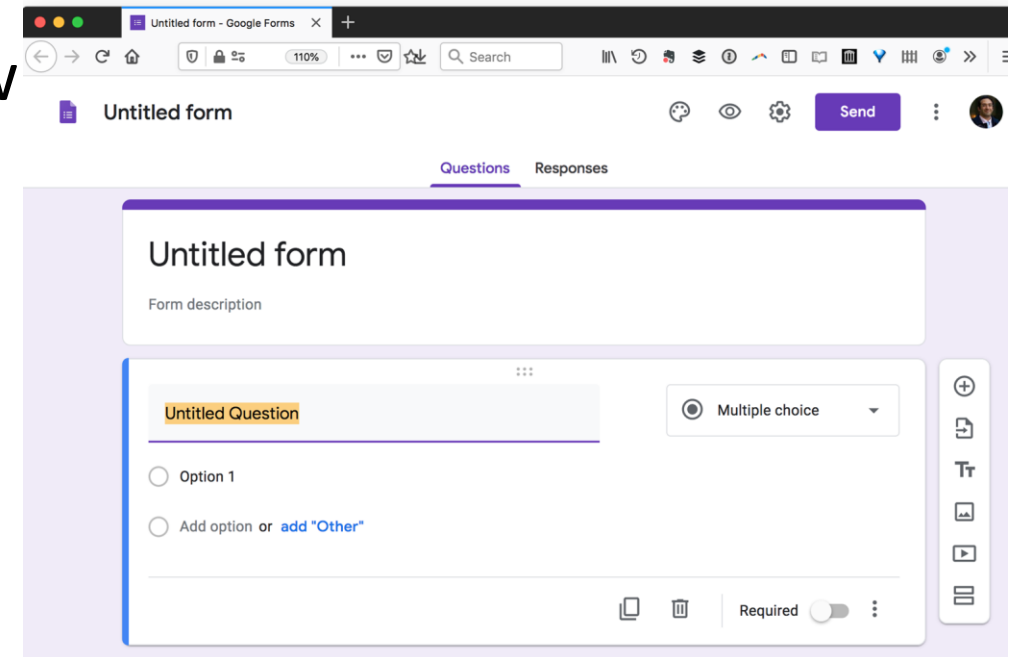
The remarks made in this presentation are mine and mine alone.  
These remarks do not reflect the views of the Social Security  
Administration or the United States Government.

~Chris Fortier



# Client Intake: DIY automations

- Who, What, Where, When, Why, How
- What is a Google Form
  - Start with your top use case
  - Hone your questions
  - Get your questions answered
- Zapier: what and how-to
  - Set up a Zap
  - Test it, use it, and edit it

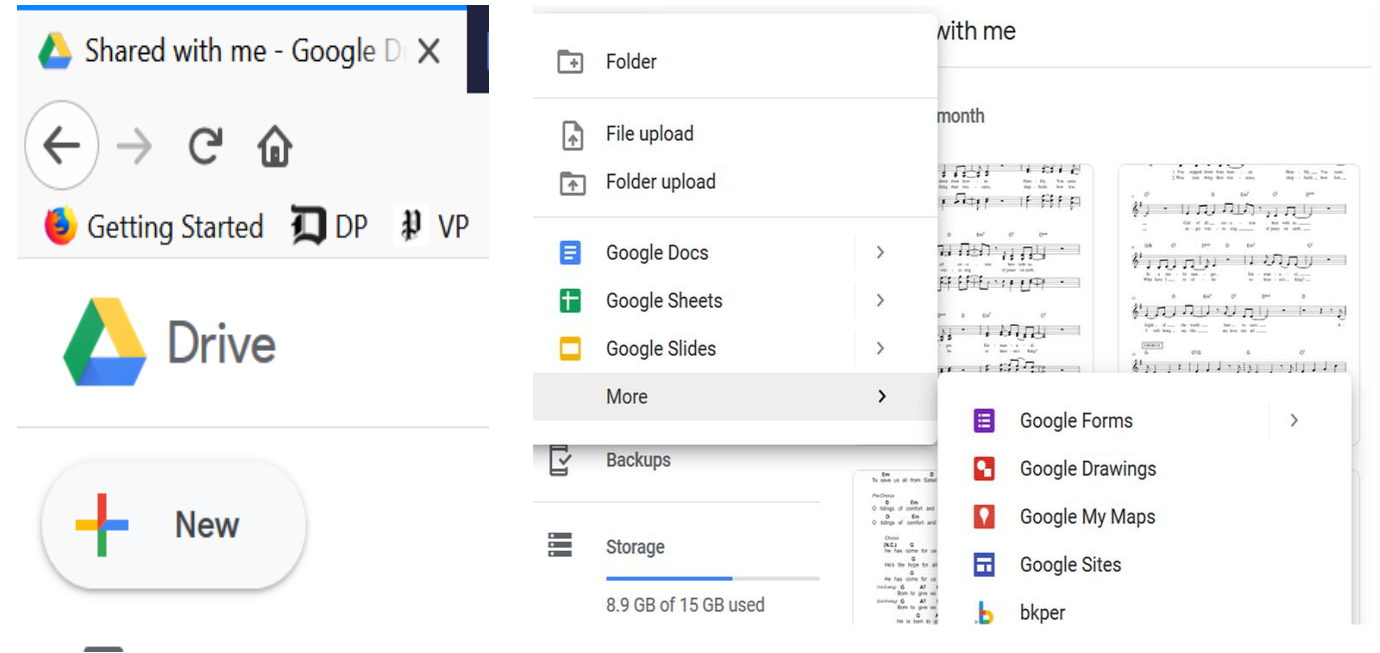


# Whys and Hows

- Who - you
- What - online forms
- Where - online!
- When - we'll set one up now
- Why - save time & money
- How - most forms services, and connectors

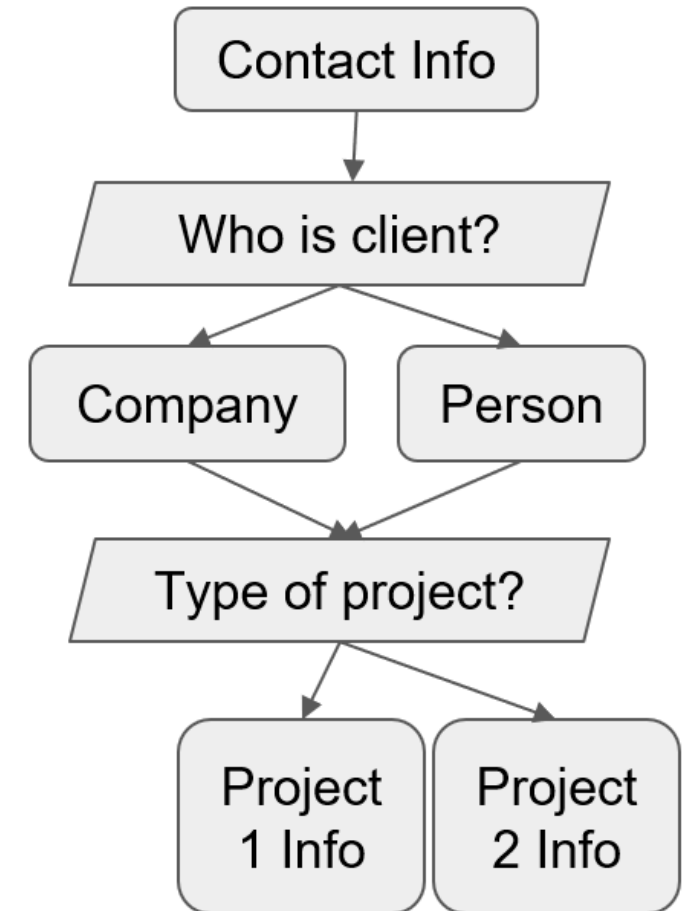
# What is a Google Form?

- Google product for building data-entry form
- Start with your top use case
- Get your questions answered



# Google Form: How-to

- Have a Google account
- Your use case: think of and hone your questions
- Group questions into a flowchart
- Build logic into your Form
- Tutorials on steps to build a Google Form:
  - <https://gsuite.google.com/products/forms/>
  - <https://zapier.com/learn/google-sheets/how-to-use-google-forms/>
  - <https://www.howtogeek.com/434570/the-beginners-guide-to-google-forms>

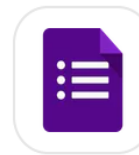


# Zapier: what and how-to

- It's a connector
- Set up a Zap
  - Zapier account
  - Authorize Zapier to access your other accounts: Google and X.
  - New Zap: Form fields → where you want the data

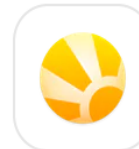
zapier

zapier makes you happier :)



When this happens

**Step 1: New Response in Spreadsheet**

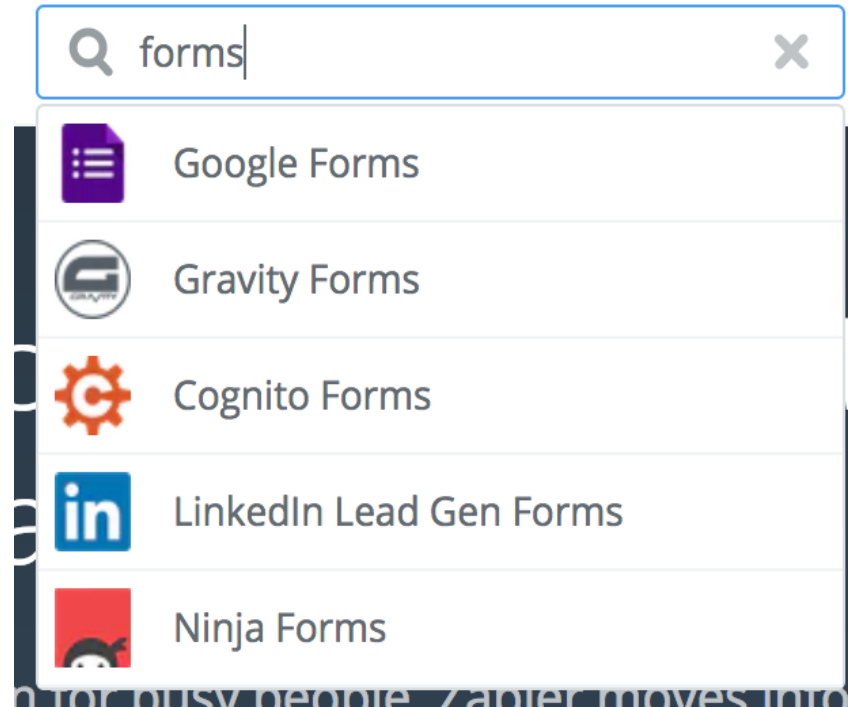


Then do this

**Step 2: Create Opportunity for Person**

# Zapier: test and use

- Use your Form
- Test your Zap
  - Is the data being transferred?
- Edit the Zap
- Maintain the Zap





# Questions? Contact Me



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**TECHSHOW 2021: March 10-13, 2021**

