Zapier integration

> **i** Please note: With 3rd party integrations, your first step in getting support is to contact the vendor, in this case Zapier, to troubleshoot any issues you are experiencing. If they determine the issue is on Keap's end, they will escalate the issue along with all relevant context to the Keap team. Learn more.

Connect Keap to hundreds of other apps with Zapier.

Zapier lets you connect Keap to 5,000+ other web services. Automated connections called Zaps, set up in minutes with no coding, can automate your day-to-day tasks and build workflows between apps that otherwise wouldn't be possible.

Each Zap will have a single Trigger, where your information comes from and which causes one or more Actions to fire across other apps automatically. This is how you can get the benefits of automating your business with Keap no matter what other tools you are currently using.

While this article is designed to get you started using Zapier with Keap, if you run into trouble with Zapier, please utilize Zapier's Help & Support resources for assistance.

Getting Started with Zapier

Sign up for a free Zapier account, from there you can jump right in. To help you hit the ground running, here are some popular pre-made Zaps.

How do I connect my other tools with Keap?

Keap allows their users to use Zapier without leaving Keap!

Ultimate Users

Keap allows their Ultimate users to use Zapier without leaving Keap! This is super helpful as it is one less thing taking you away from automating critical processes in your business. Here is how you do it:

1. Navigate to Automation > Zapier

2. Click the Sign-In button at the top right of your screen

3. Complete the authentication steps to connect your app to Zapier

4. Click the Zaps logo on the left menu of the embedded Zapier experience

5. Use Zapier as normal

Note: If you have zaps built using the Max Classic App on Zapier, you will need to continue to access them through Zapier directly. The good news is that ALL ZAPS you create on the Keap App in Zapier will automatically show up for you to see within your application.

What enhancements have been made to the Keap App on Zapier?

As we have consolidated the two offerings on Zapier into a single offering, we have made several enhancements for users of either application.

1. There is no longer a premium connection requirement for users to leverage Zapier. This means that if you are under Zapier's minimum requirements for paid usage you can connect to your Keap app at no additional cost.

2. You will have access to much more robust actions and triggers allowing full mapping to contact records within users' Keap instances.

3. We've added more dynamic drop downs that leverage triggers behind the scenes in order to populate lists with easier to understand data and clearer schemas to work with.

4. We've also added new functionality across the app so that Keap users have a consistent experience with what is available to them. Keep reading to see what is available in the app today.

Note: you will typically see call outs in the documentation if a trigger or action is specific to ultimate. For example, opportunities triggers and appointments triggers are specifically for Ultimate users.

Available triggers, actions, and searches in the Keap app

TRIGGERS	NOTES
New Contact Added	Contains the contact functionality from the previous New Contact Added trigger in the Max Classic App
New Tag Event	- Added, Edited, Deleted, or Applied to a contact - Contains the functionality from the New Contact Tag trigger
New Invoice Event	- Triggers on Invoice Added, Edited, or Deleted - Takes in the Invoice with Line-item Support functionality
New Invoice	Specifically triggers specifically when an invoice is added
New Payment (All Types)	Triggers when any payment is made regardless of the payment type. Credit Card Payments, Cash Payments, and Check Payments.

New Manual Payment – (Cash, Check)	• Triggers when a New Manual Payment is added. (Cash or Check).
New Credit Card Charge	• Triggers when a new credit card charge is made. (Merchant Only).
New Subscription Event	• Triggers when a subscription is added, edited, or deleted. • Includes previous functionality of Cancelled Subscription and New Subscription triggers
New Task Event	• Triggers when a task is added, edited, deleted, or marked complete / incomplete • Includes previous functionality of the New Task Added triggers • Includes the task functionality found previously in the New Contact Added trigger in the Max Classic App
New Opportunity Event	• Triggers when an opportunity is added, edited, deleted, or has a stage move. • Includes previous functionality of Opportunity Created and Opportunity Stage Moved Triggers
New Action sequence	• No change to this functionality
New Affiliate	• All functionality is the same • Password field is no longer retrievable due to security changes in the industry
New Appointment Event	• Ultimate users only • Triggers when an appointment is added, edited, or deleted • Includes the appointment functionality found previously in the New Contact Added trigger in the Max Classic App
New Company Event	• Triggers when a company record is added, edited, or deleted. • Includes previous functionality of New Company Added trigger
New Note Event	• Triggers when a note is added, edited, or deleted. • Includes the note functionality found previously in the New Contact Added trigger in the Max Classic App
New Product Event	• Triggers when a product record is added, edited, or deleted. • Includes previous functionality of New Product Added trigger

ACTIONS	NOTES
Add a Product to an Invoice	• Add a product to an already existing Invoice
Create Company	• Creates a Company record
Create Invoice	• Creates an invoice with line items.
Create Note	• Creates a new note on a contact record
Create or Update Contact	• Creates a new contact or updates an existing contact
Create Task	• Creates a new task on a contact
Remove Tag From Contact	• Remove a tag on a contact.
Tag Contact	• Apply tags to a contact.
Update Company	• Updates a Company
Create Product	• Creates a Product
Send Email	• Create and send a new email to a contact or multiple contacts, as well as record the email in the contacts' email history.
Find an Invoice	• Finds an invoice by ID.
Find Company	• Search for a company by name Optionally, create a company if none are found.
Find Contact	• Find a Contact. Optionally, create a contact if none are found.

FAQ's

Why are we making this change?
Until now, there have been two options for connecting Zapier to Keap, with each providing different functionality. Naturally, this is often a point of confusion for Keap users. With a drive to eliminate confusion for our users in the product (and even out of the product), our new and improved version now provides all Keap users with a single unified app on Zapier.

What happens to my zaps I built on the Max Classic Zapier App?
The great news is that we have worked with Zapier to ensure that your zaps will continue to run as they are built. We encourage ALL KEAP USERS to leverage the new Keap App as we are going to be hiding access to the Max Classic Zapier App in the coming weeks, and neither Keap nor Zapier will maintain the support of the Max Classic Zapier App.

What this means to you is that any time you want to edit a zap you built in the Max Classic Zapier App or if a zap breaks, you will be adding steps or rebuilding steps leveraging the new Keap app. All of the functionality you need is in the new Keap App.

Note: For users of the "New Payments Feature" in the Max Classic Zapier app, this functionality will need to be handled via the New Payment (All Types) event trigger. We deprecated this functionality as it had minimal users on it, and its use cases are handled by other triggers and actions in the new Keap App. Again, any zaps with this functionality will continue to run as built, but if/when you want to update them or need to fix them, you will need to rebuild these zaps in the new Keap app.

What if I experience issues with the new Keap app?
As always, if you have issues while using the Zapier integration, you can submit your feedback to Zapier directly and they ensure that it gets to our team with all the needed context for us to troubleshoot the issues you are experiencing.

Whether you are using the embedded Zapier platform in your Keap app, or going to Zapier directly the process is the same.
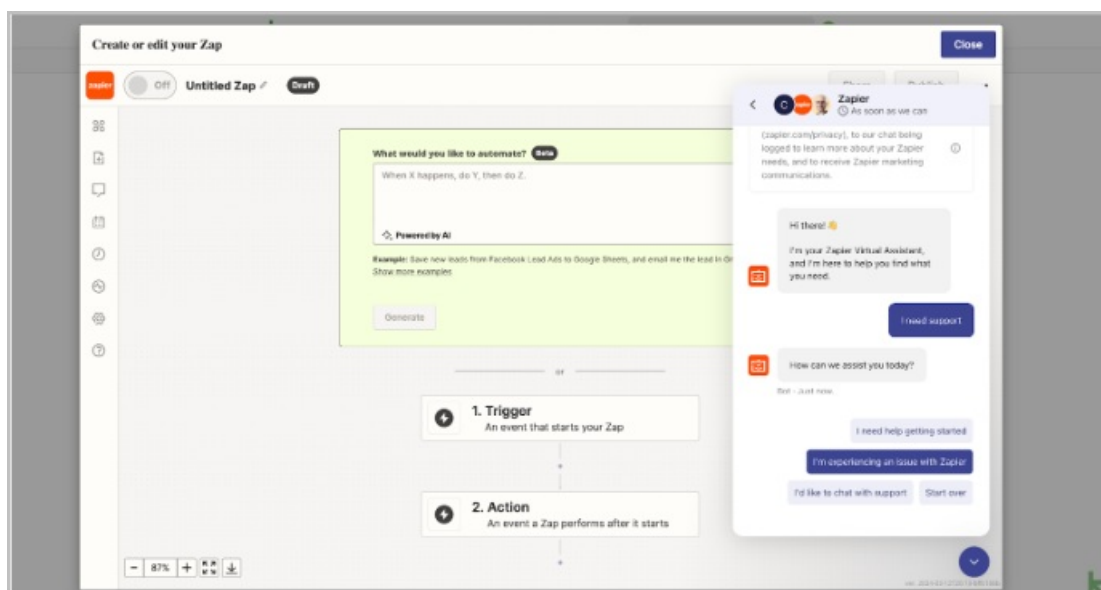
All users can leverage the help icon at the bottom right of the zap building screens in Zapier to reach Zapier's support. Please click:
- I need support
- I am experiencing an issue with Zapier

As you complete these prompts, the Zapier team takes notes of the issue, captures any of the settings from your current Zapier session, finds all relevant logs of your issue if possible, and sends them directly to our team for support.

Note: When you call into Keap Support with a Zapier question, our representatives will direct you to file the ticket directly with Zapier as the context that is passed to our dev team only comes from tickets submitted via Zapier.