Auto-Import Data from Third-Party Service Providers

Databases · https://www.codereadr.com/knowledgebase/auto-import-data/

A Guide to Zapier and Make Integrations

Streamline your workflows by seamlessly integrating CodeREADr with third-party service providers like Zapier and Make (formerly Integromat). This guide will show you how to automate data imports and exports using these tools, saving time and reducing manual effort.

Zapier Integration: Automate Your Data Transfers

Our Zapier app leverages the CodeREADr API to connect with other cloud platforms. Here's what you can do with this integration:

Key Zapier Options

1. Auto-Insert Barcode Data (ACTION)
    - Automatically add barcode values and optional responses into a CodeREADr validation database.
        - Barcode Values: Scanned data entries.
        - Responses: Optional descriptions or related metadata.

2. Transfer Scan Records (TRIGGER)
    - Automatically push scan records from CodeREADr servers to third-party servers.

3. Sync CodeREADr Data (TRIGGER + ACTION)

- Use CodeREADr as both the TRIGGER and ACTION to auto-insert scan data into a CodeREADr validation database. This allows data aggregation from multiple sources or workflows.

Learn more about Zapier Integration here.

Tips for a Smooth Zapier Workflow

1. Managing Triggers and Actions
   - When updating CodeREADr services, it's often easier to create new Zaps and disable old ones rather than editing existing Zaps.
   - Test the Catch Hook Trigger using the updated configuration to ensure a successful integration.

2. Using Multiple Services with a Shared Database
   - To insert data into the same validation database using multiple services:
     - Ensure all services are linked to the same database in Step 1 (Type) of the CodeREADr service creation wizard.
     - Generate unique Webhooks on Zapier for each service and paste them into the Postback URL field in the Advanced settings.

3. Export Templates for Workflow Tracking
   - For workflows like process tracking, asset management, or shipment tracking, you'll need:
     - Unique export templates for each service.
     - Prompts designed to display the last step's responses, ensuring users can view prior progress before acting.
   - Example: In a shipment tracking workflow, app users at each step see the status from the previous step and input updates for the next user.

4. Shared Prompts
   - If you share prompts across multiple services:

- Ensure app users answer all prompts at each step; unanswered prompts will appear blank in subsequent scans.
- Make prompts mandatory by marking them with an asterisk during the Questions step

Make Integration: Flexible Automation Options

Using Make, you can:

- Add values to a CodeREADr database.
- Webhook scan data to third-party apps for real-time updates.

It functions very similarly to the Zapier functionality in CodeREADr - we are set up to receive values from third party software through Make. You can also use Postback with the Make webhooks to post scan data elsewhere.

Why Automate with CodeREADr?

By connecting CodeREADr with Zapier or Make, you unlock powerful automation capabilities:

- Save time with automatic data transfers.
- Enhance accuracy by reducing manual data handling.
- Improve workflows with custom triggers and actions tailored to your needs.