



Zapier Trigger for Alerts Sent to Email or SMS

1. You first need to set up the codeREADr Service and the Trigger App (in this case, codeREADr).

- a) [Create a service](#) using your codeREADr.com account.
 - i) You have no restrictions when creating your services. They can be a record-scans or validate scans service type, online or offline, with or without app-user prompts ('Questions').
 - ii) The key consideration is what you want to trigger the alerts. You have many options, including the barcode value, response text, status (e.g. an invalid scan), service name, app username or an answer to a prompt.

For the example below we used a specific answer to an app-user prompt to trigger the alert - in this case the filter is the word 'Fail'. Think of a security guard doing their rounds. Let's say they find a door unlocked, a fire extinguisher discharged, a temperature too high or some other parameter exceeding standard limits. If the guard scans the asset's barcode and when prompted to disposition the asset, if they choose the multiple choice option 'Fail' then that will trigger the alert to be sent.

- b) After you have your service created, follow the instructions to [Create the Trigger](#) using a Zapier Webhook. When you've completed a) and b) you are ready for creating the Action.

2. Now connect the Action App using a standard Zapier Action.

Under 'Apps' on Zapier.com search for 'Zapier' and you will see these Actions:

- a) 'Filter by Zapier' allows you to define what will actually trigger the alert.
- b) 'SMS by Zapier' allows you to define who get the alert and with what text in the message. You can have a simple message or you can include some contextual information. With SMS there's a limited # of characters (153).
- c) 'Email by Zapier' isn't limited so you can add more contextual information within the alert. For example:

The screenshot shows a configuration for a Zapier action. It consists of several steps, each with a 'Step 1' label and a small icon. The steps are:

- Service: Security Check
- Barcode Value: 1002
- Result/Response: Building 2, Second Floor, Room 2A
- Special Message: This alert requires immediate attention.
- Timestamp Scanned: 2018-05-15 12:54:43

To the right of the configuration, there is a button labeled 'Choose from Catch Hook options' with a red arrow pointing to it. Another red arrow points from the button to a menu icon in the top right corner of the configuration area.

- d) IMPORTANT: It matters when you prompt the app-user. The most common prompt is presented "after submitting a valid scan" but you can choose what best suits your needs. The key is to have all prompts be either before or after submission, not some before and some after unless you don't need all the answers in SMS or emailed body.

3. Overview of the Action setup for SMS with a simple message:

Add a note



FILTER

2. Only continue if...

Filter by Zapier

Only continue if...

Filter Setup & Testing

Rename Step

Delete



ACTION

3. Send SMS

SMS by Zapier

Send SMS

SMS

Edit Template

Test this Step

Rename Step

Delete



Filter Setup & Testing

Choose the condition(s) your data should meet to continue to run [Learn more](#)

Only continue if... (required)

Question: Status (Text) Contains Fail

+ AND + OR

The app-user prompt is 'Status'

And one of the answers is 'Fail' which will trigger the alert.

Test & Continue



Set up SMS by Zapier SMS

Setup Preview [Learn more](#)

ON

From Number (optional)

Will attempt to send from this number, falling back to a random number if no longer available or unspecified.

19495654927

Pick a number to send SMS

Message (required)

Messages with more than 153 characters will be truncated.

Asset failed test. Affected Service is Security Patrol 1.

Add text to the alert.

Refresh Fields

Continue