



# ZAPIER

TRIGGERS . ACTIONS . FILTERS  
PATHS . FORMATTER . TABLE  
MULTI-STEP ZAPS . MONITORING

## DURATION

**20 Hours**

## LEVEL

**Beginner**

## MODULES

**8**

## MODE

**Classroom ·  
Online · Hybrid**

## 01 COURSE OVERVIEW

**A Zapier course for automating business processes across SaaS tools without code.** The course covers Zap design from trigger to action, then the tools that make Zaps reliable: filters, paths, formatter steps, lookup tables, delays and error notifications. Task usage and cost control are treated seriously.

Learners automate lead handling, invoicing and reporting processes.

### WHO IT IS FOR

Small business owners

Marketing and sales operations staff

Admin and HR teams

Freelancers streamlining delivery

### PREREQUISITES

None. Accounts for the apps being connected.

## 02 LEARNING OUTCOMES

**01** Map a manual process before automating it.

**03** Format and transform data between apps.

**05** Schedule and delay steps appropriately.

**07** Control task consumption and cost.

**02** Build multi-step Zaps with filters and paths.

**04** Use lookup tables and storage for state.

**06** Monitor Zap history and fix failures.

### 01 AUTOMATION BASICS

Process mapping

Polling vs instant

Plan limits

Triggers and actions

Task accounting

### 02 BUILDING ZAPS

App connections

Testing

Naming and folders

Field mapping

Multi-step Zaps

LAB

FIRST ZAP

### 03 LOGIC

Filters

Conditional routing

Schedule triggers

Paths

Delay steps

Digest

### 04 DATA HANDLING

Formatter

Line items

Storage

Text and date operations

Lookup tables

Code steps overview

LAB

DATA CLEANUP ZAP

### 05 COMMON BUSINESS FLOWS

Lead capture to CRM

Invoice creation

Slack notifications

Form to spreadsheet

Calendar and scheduling

LAB

LEAD ROUTING

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## 06 DOCUMENTS AND FILES

Google Workspace

E-signature flows

PDF generation

File storage and naming

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## 07 RELIABILITY

Zap history

Replay

Version management

Error alerts

Duplicate prevention

Ownership

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## 08 SCALING AND COST

Task optimisation

When to move to n8n or code

Team management

Consolidating Zaps

Documentation

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### PROJECT

THREE AUTOMATED BUSINESS PROCESSES

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## 04 ASSESSMENT & CERTIFICATION

|                             |     |
|-----------------------------|-----|
| Module assignments and labs | 25% |
| Mini projects               | 20% |
| Internal assessments        | 15% |
| Final project and review    | 40% |

### CERTIFICATION

Learners who complete all modules, submit the final project and clear the review receive a course completion certificate from Kaizen Infinities Private Limited. Project work is documented for the learner's portfolio, and interview preparation is included in the closing sessions.

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## 05 CAREER OUTCOMES

### ROLES THIS PROGRAMME PREPARES FOR

OPERATIONS EXECUTIVE

MARKETING OPERATIONS ASSISTANT

AUTOMATION SPECIALIST

VIRTUAL ASSISTANT

SMALL BUSINESS OWNER

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