

A.I. & AUTOMATION FOR ELECTRICIANS



WORKBOOK
DAY FOUR #TASK 4

Task 4 Day 4

Build Your Review Request Automation

Today, our goal is to set up your automated review-request zap in Zapier.

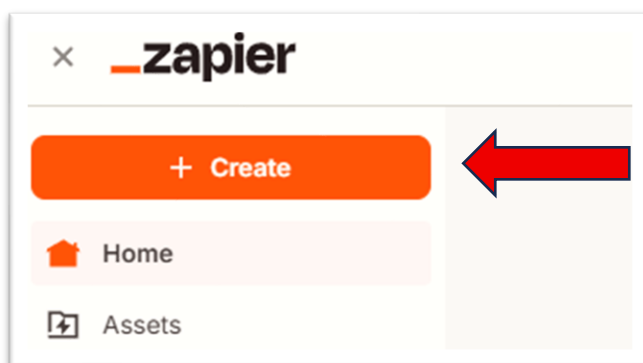
Why is this important?

Instead of hoping customers remember to leave a review, you'll automatically follow up after each job - boosting your chances of receiving consistent Google reviews without having to chase anyone manually.

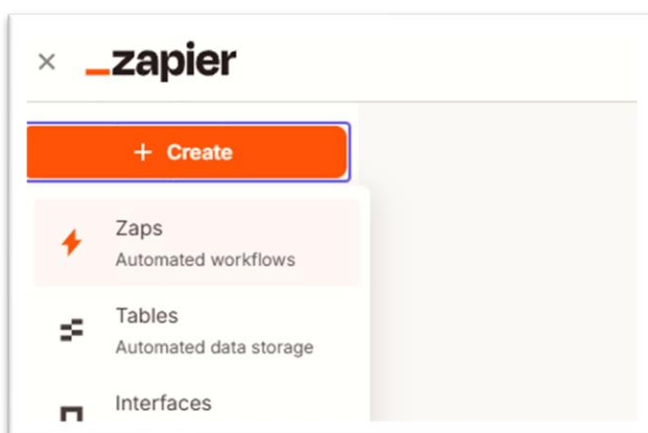
Today's Task

Step 1: Create a New Zap

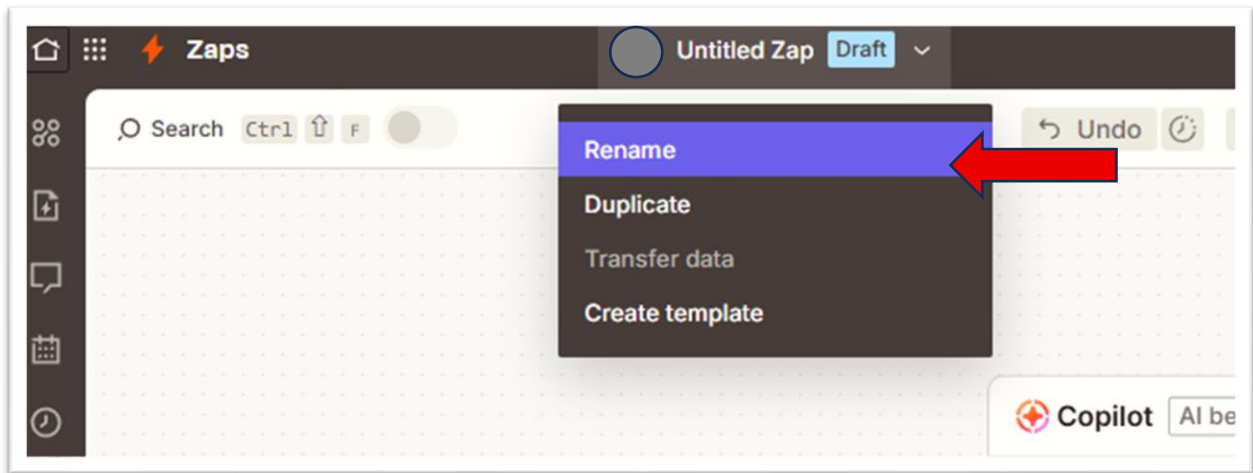
- Log into your Zapier account <https://zapier.com/app/home/>
- Click 'Create' on the left-hand menu



- Select 'Zaps'

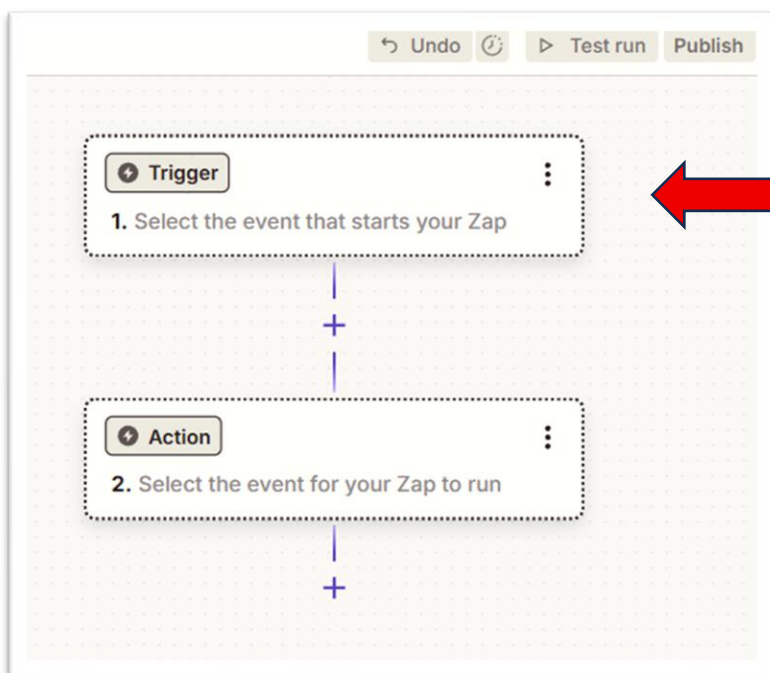


- Rename your Zap (e.g. 'Review Requests')

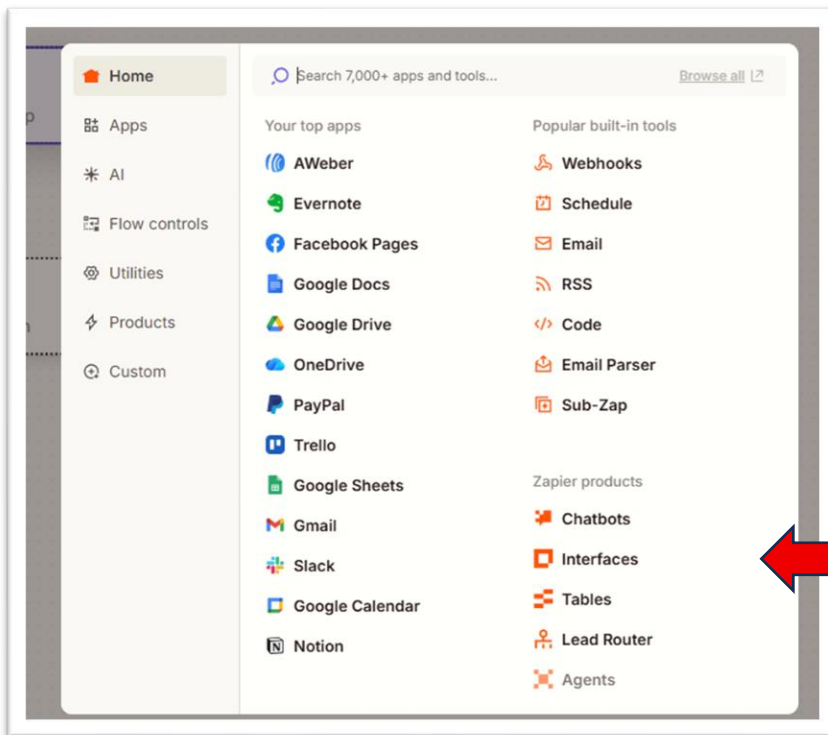


Step 2: Set Up Your Trigger

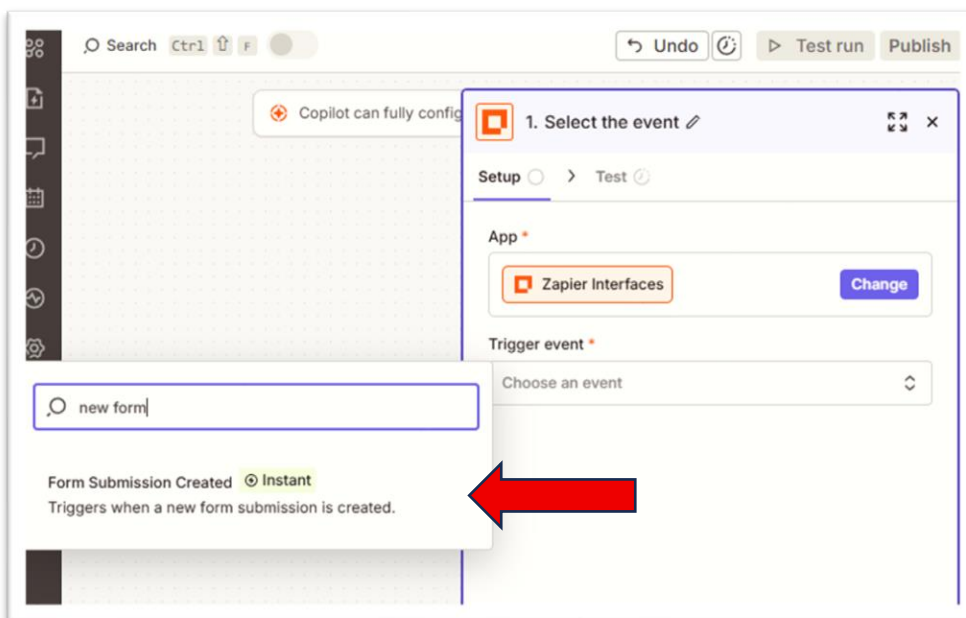
- Click the Trigger box



- Search 'Zapier Interfaces'

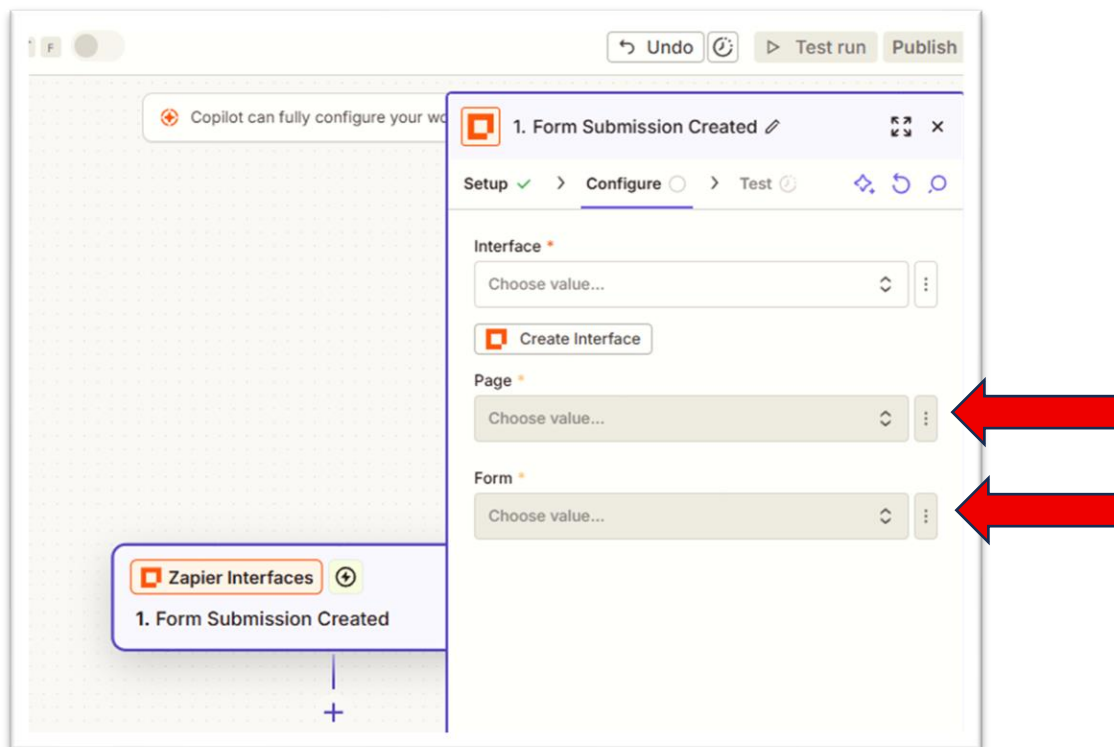


- Choose trigger event: 'New Form Submission'



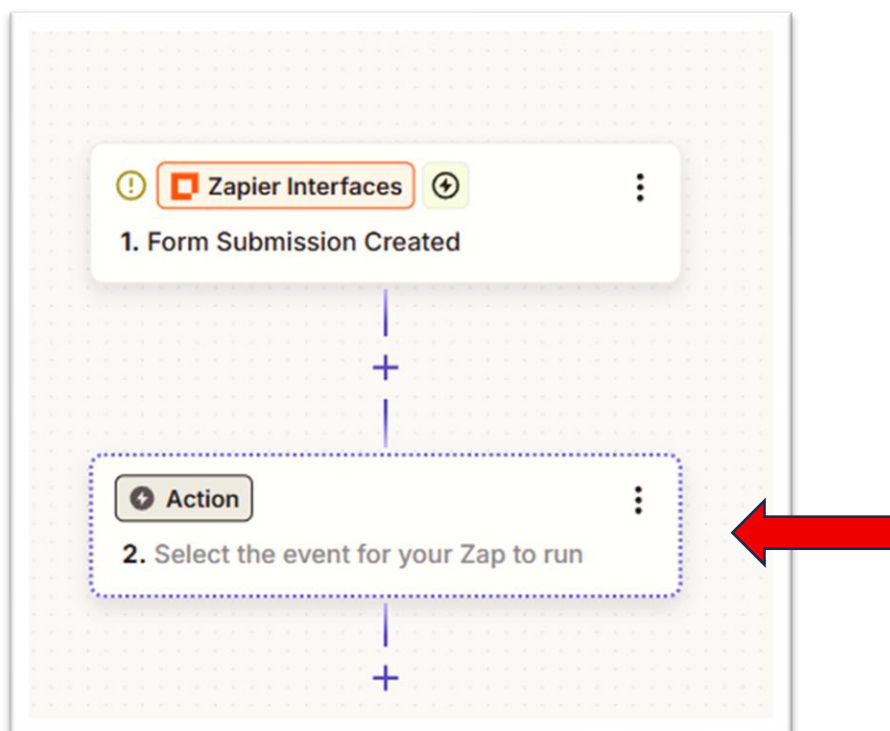
- Select your interface (Review Automation)
- Select your page (Review Request page)
- Select your form (the one you created on Day 2)

- Test trigger - Zapier will pull test data if no real form submitted yet.

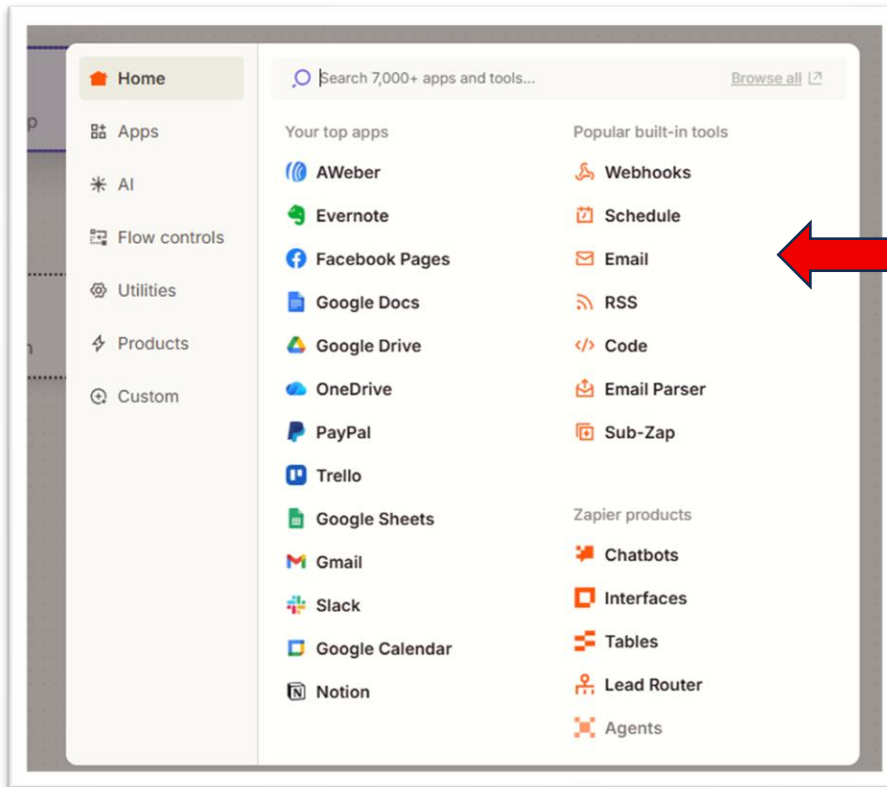


Step 3: Set Up Email Action

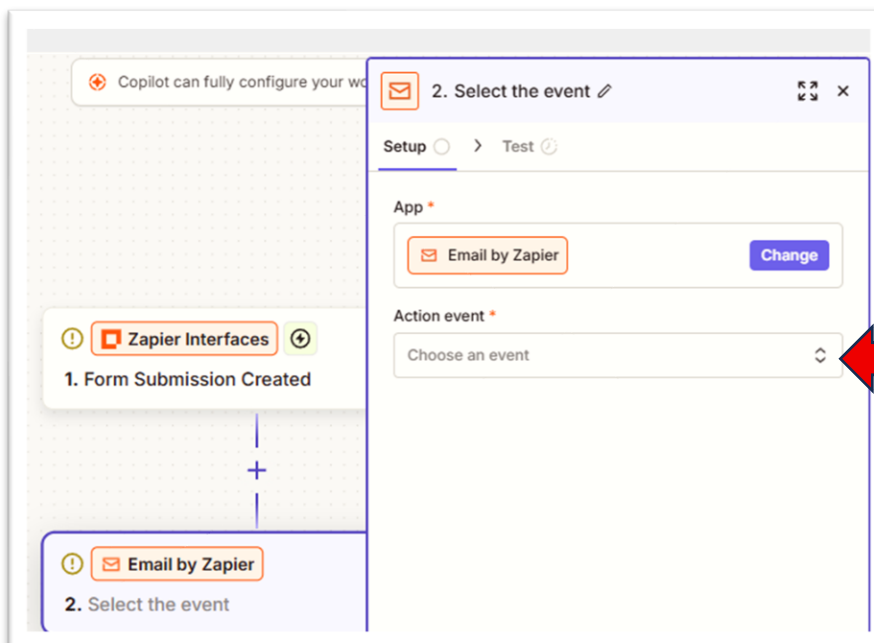
- Click the + button to add a new action



- Click Email or Search 'Email by Zapier'



- Choose action event: 'Send Outbound Email'



- Click into the 'To' field

Copilot can fully configure your Zap

2. Send Outbound Email

Setup ✓ > Configure ○ > Test ⚙

Trial or Free Zapier plan:

- Emails sent during [testing](#) are sent to the [Zapier account email address](#). Once published, emails go to the intended recipients (To, CC, BCC).
- You can send a maximum of 5 emails per account per day.

Paid Zapier plan:

- You can send a maximum of 10 emails per account per hour.

To * ⓘ

Enter text or insert data... +

Subject *

Enter text or insert data... +

Body (HTML or Plain) * ⓘ

Enter text or insert data... +

Attachment ⓘ

Enter text or insert data... +

To continue, finish required fields

- Click the data picker (right side) and select 'Customer Email Address' from form data

1. Form Submission Created in Zapier Interfaces

- Form Submission ID: cmggbr1tq02sp0t98c2di
- Form ID: cmg85kf9m002fn5hgn1go8di
- User Created At DateTime
- User avatar URL: https://example.com/sample-avatar.png
- User ID: cmggbr1tq02sq0b9xflogvqt
- Is this sample data? true
- Interface ID: cmggbr1tq02sr0b9xbnnhb1wo
- Form Data: Customers email address: sample.user@example.com

- Type a subject line e.g. 'Please leave us a review'

The screenshot displays the Zapier 'Send Outbound Email' configuration window. On the left, a workflow diagram shows two steps: '1. Form Submission Created' and '2. Send Outbound Email'. The '2. Send Outbound Email' step is highlighted. The main configuration area on the right includes a 'Trial or Free Zapier plan' notice, followed by fields for 'To', 'Subject', 'Body (HTML or Plain)', and 'Attachment'. Each of these fields has a placeholder 'Enter text or insert data...' and a plus icon. Three red arrows point to the 'Subject', 'Body', and 'Attachment' fields, indicating where to enter the review message and link. At the bottom, a button says 'To continue, finish required fields'.

- Write your message, include your Google review link.
- Optional: insert dynamic fields (e.g. customer name) if added in your form
- Click Continue and Test, the test email should arrive in your inbox

2. Send Outbound Email

Setup ✓ > Configure ✓ > Test ⓘ

Send outbound email

To test Email by Zapier, we'll create a new outbound email. This is what will be created:

Data in

Search item data...

To haydon@revampautomation.co.uk

Subject Please can you leave me a review on Google?

Body Hello Sample User,
I'd love it if you can leave me a review using the link below.
www.wattcoelectrical.co.uk/review
Thanks

Reply To haydon@wattcoelectrical.co.uk

from_name Haydon the Electrician

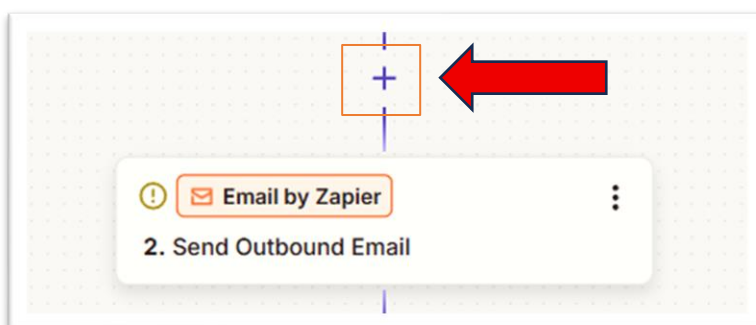
Empty fields:

Attachment empty (optional)

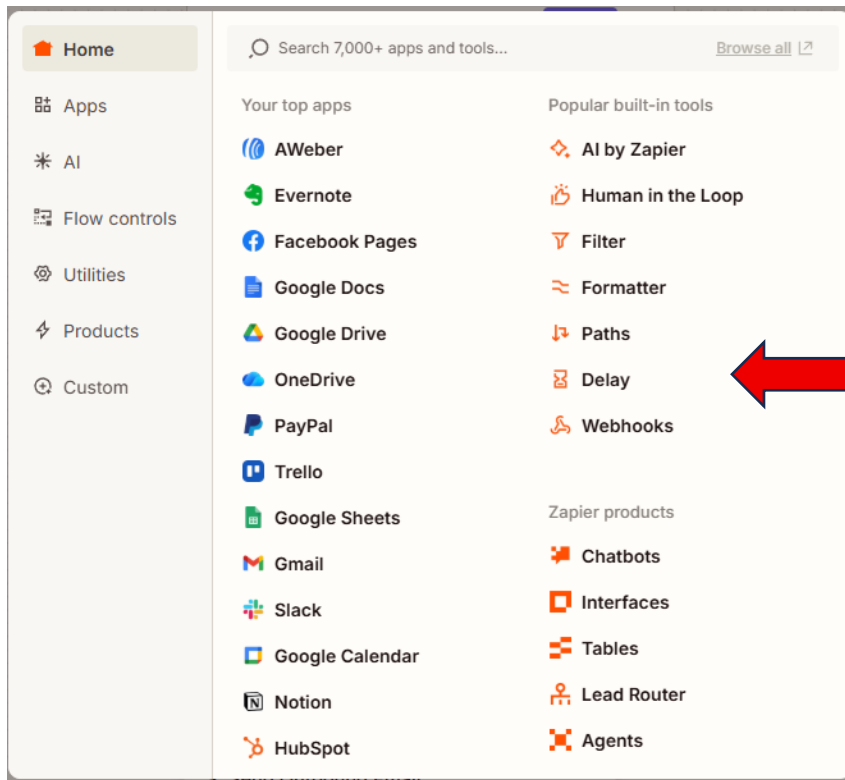
Skip test Test step

Step 4: Add Delay Before Sending (Optional but recommended)

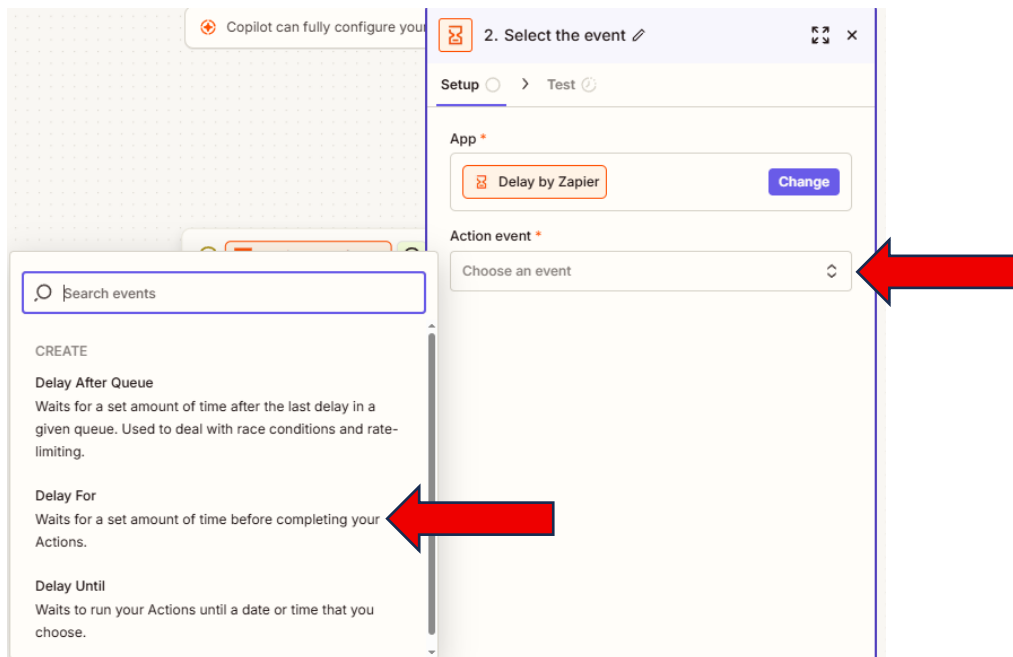
- Click + above your email step



➤ Search 'Delay'



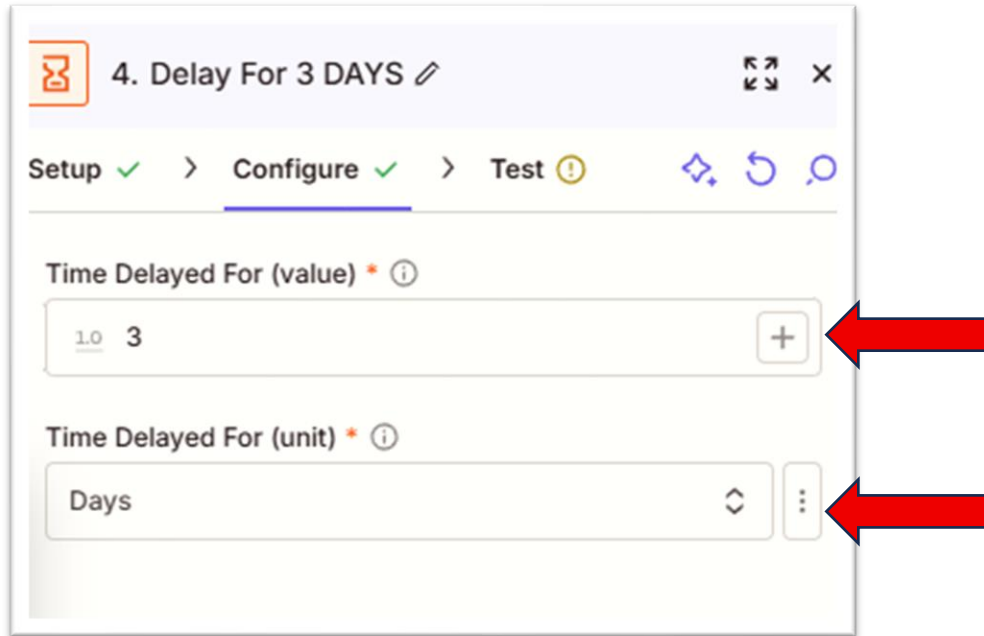
➤ Choose 'Delay For'



- Enter delay (e.g. 1 hour) so customer doesn't receive immediate email after job
- Confirm and test step.

Step 5: Add a Second Reminder (Optional)

- Add another Delay step (e.g. delay 3 days)



4. Delay For 3 DAYS

Setup ✓ > Configure ✓ > Test ⚠

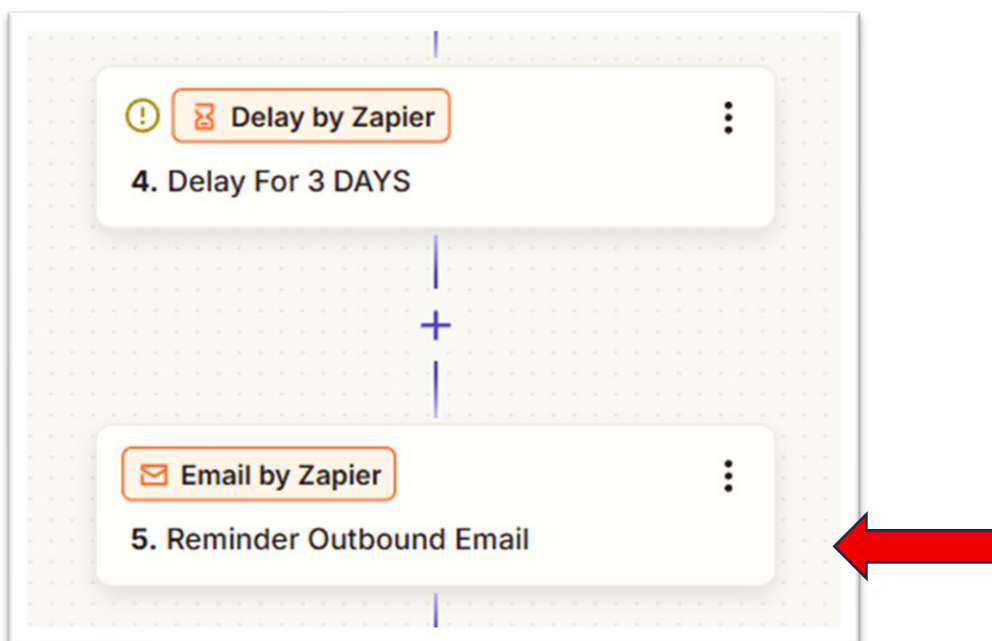
Time Delayed For (value) * ⓘ

1.0 3 +

Time Delayed For (unit) * ⓘ

Days ⌵ ⋮

- Add another Email by Zapier step after delay
- Map the 'Customer Email' field again
- Write a short reminder message requesting a review



Step 6: Publish Your Zap

- Review all steps
- Remove any empty/incomplete steps
- Click 'Publish' at the top right
- Your automation is now live!



Day 4 Action Steps:

- Create and name your Zap
- Add your form trigger
- Add review request email action and insert review link
- Add a delay before sending
- Test email reaches you before going live
- Publish automation

Then, **Return to Today's Task Post** in the Group and **Post a Screenshot of your Zap.**

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