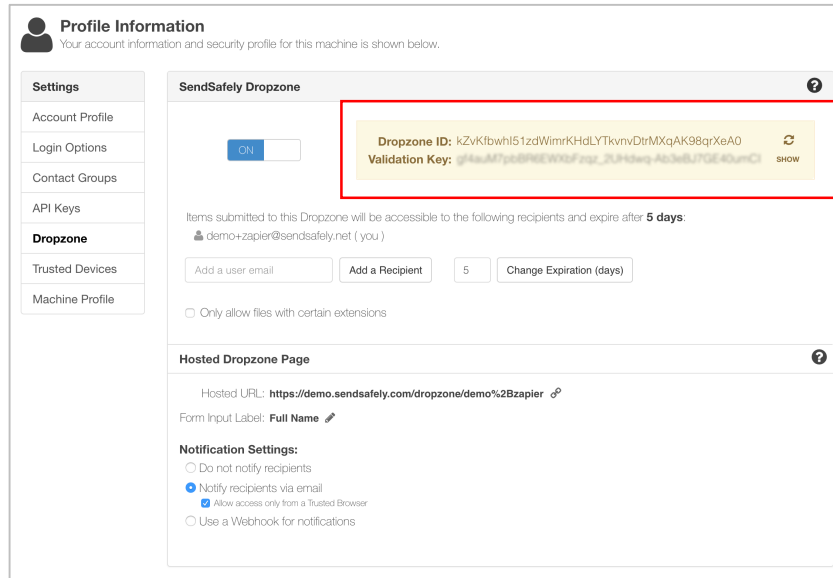## Step 1 - Enable your SendSafely Dropzone

Your Dropzone can be enabled by logging into the SendSafely portal and browsing to the **Dropzone** section of the **Edit Profile** screen. Once enabled, you will see your Dropzone ID and Dropzone Key displayed. You will need these two values to configure the Zapier app.

Step 2 - Configure the SendSafely Zapier Trigger App

In Zapier, choose the "Make a Zap!" option and search for the SendSafely app (https://zapier.com/apps/sendsafely/integrations). The SendSafely Zapier App exposes a single Trigger method, which gets invoked every time there is a new submission to your Dropzone.
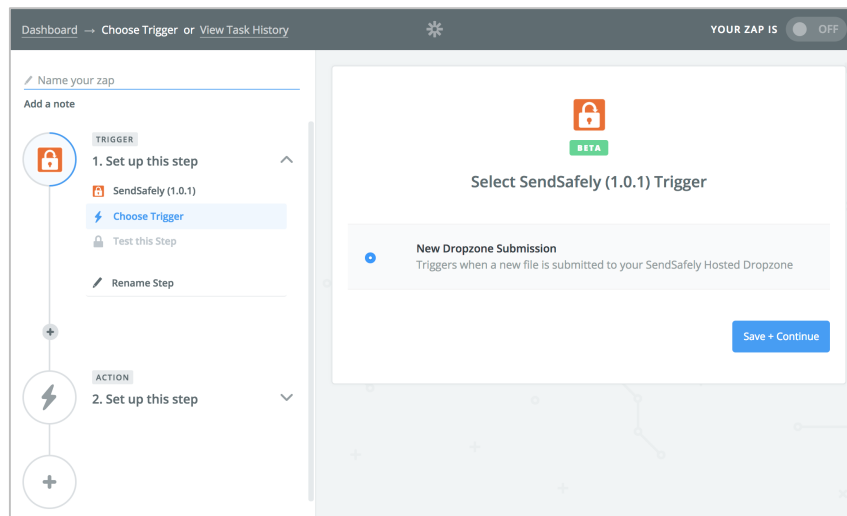
After you press continue, you will need to connect the Zapier App to your Dropzone using the "Connect an Account" option.

SENDSAFELY

Allow Zapier to access your SendSafely (1.0.1) Account?

Dropzone ID (required)

Your Dropzone ID can be obtained from the Dropzone section of the SendSafely Edit Profile screen

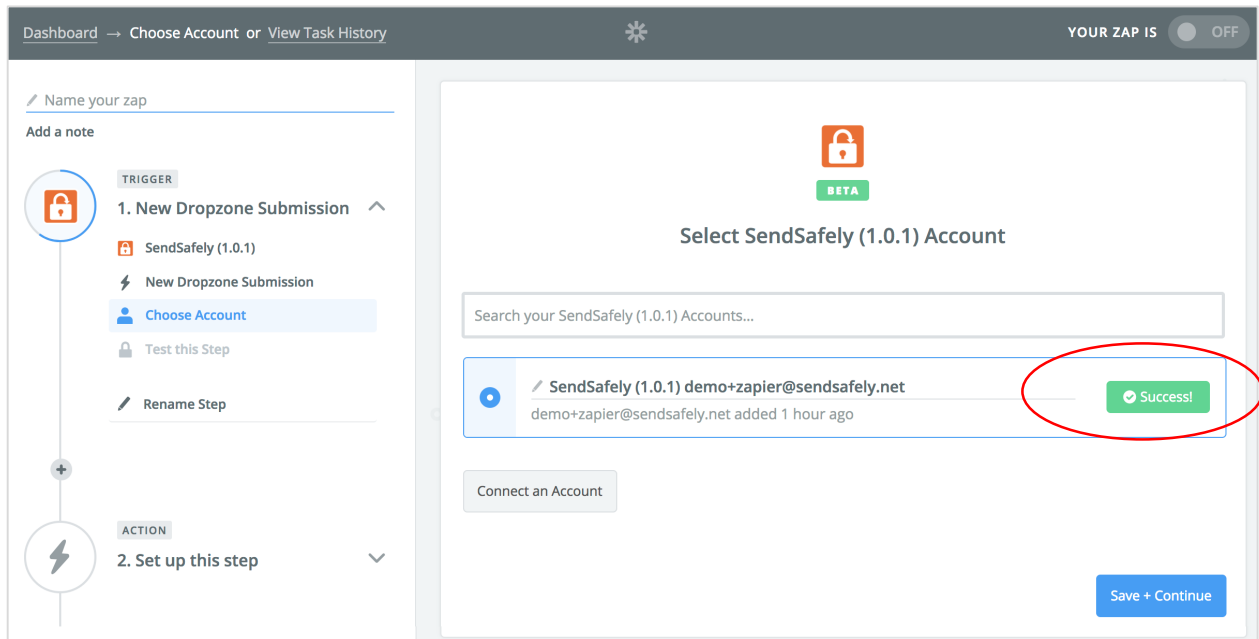**Validation Key** (required)

Your Validation Key can be obtained from the Dropzone section of the SendSafely Edit Profile screen

SendSafely Hostname (required)

https://mycompany.sendsafely.com

Yes, Continue   Cancel

To connect your SendSafely account to Zapier, you will be prompted to provide your Dropzone Id and Validation Key (both obtained from the SendSafely Edit Profile screen) and the SendSafely hostname you normally authenticate to.

For enterprise users, the SendSafely hostname is typically **https://companyname.sendsafely.com**. For PRO users, the hostname is **https://www.sendsafely.com**.

Once connected, you should see the email address associated with your SendSafely account shown in the description field of the connected account.

Dashboard → Choose Account or View Task History   YOUR ZAP IS   OFF

Name your zap
Add a note

TRIGGER
1. New Dropzone Submission
SendSafely (1.0.1)
New Dropzone Submission
Choose Account
Test this Step
Rename Step

ACTION
2. Set up this step

Select SendSafely (1.0.1) Account

Search your SendSafely (1.0.1) Accounts...

SendSafely (1.0.1) demo+zapier@sendsafely.net   Success!
demo+zapier@sendsafely.net added 1 hour ago

Connect an Account

Save + Continue

You can verify the credentials by pressing the "Test" button on the right side of the screen, which should show "Success" if the credentials are valid. Once the test is successful, press the "Save and Continue" button .
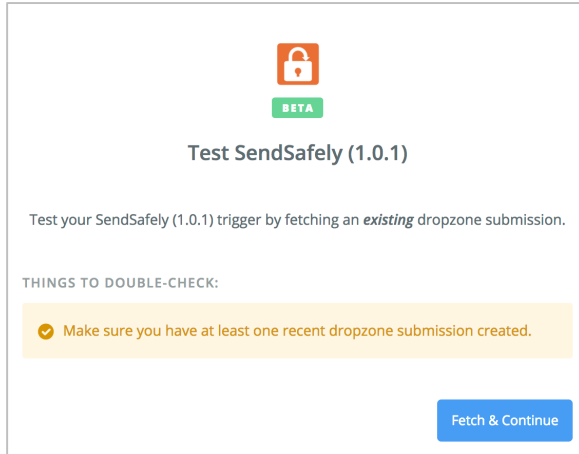
After choosing an account, you will be prompted to test the new trigger. Use the "Fetch & Continue" button to run the test.

If you have previously submitted an item to your Dropzone, the most recent submission will be returned during the test. If you have never submitted an item to your Dropzone, then a system-generated sample will be returned instead.

After the test completes, you can click the "view your drop zone submission" link to view the data returned by the test. The data returned includes the following 5 values:
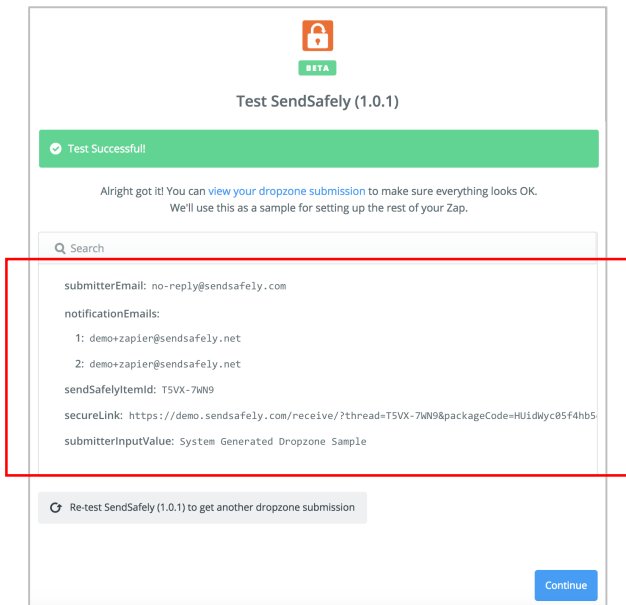
SubmitterEmail – The email address provided by the person that uploaded the files

NotificationEmails – The list of Dropzone Recipients configured for the Dropzone. Dropzone recipients can be managed from the Dropzone section of the SendSafely Edit Profile screen.

SendSafelyItemId – A unique identifier associated with the file submission

SecureLink – A link that can be used by any of the Dropzone Recipients to access the uploaded files

SubmitterInputValue – The text input value provided by the person that uploaded the files.

The submitterInputValue can be used to provide a custom lookup value that users provide when submitting files to the Dropzone. By default, this field is labeled "Name" but can be re-labeled using the "Form Input Label" option on the SendSafely Dropzone configuration screen. Refer to the advanced example further down in this document for an example of how to use this field to correlate the Dropzone submission to a record within another system.

Step 4(a) – Add a Zapier Action (Simple Example)

Now that you've fetched a Dropzone submission, you are ready to connect the SendSafely Trigger to an Action, which can be invoked by another Zapier app. The following simple example shows how the "Email by Zapier" app can be used to send an email notification to all Dropzone Recipients every time a new file is uploaded.

You can add an Action by pressing the "+" icon under the SendSafely trigger, then search for "Email by Zapier". Once selected, choose "Send Outbound email" as the action.

✉️

Set up Email by Zapier Outbound Email

👁 **Setup Preview**   Learn more   ON 👁

✉ **To** (required)

Can be a comma separated list of emails. Limited to 5.

🔒 Step 1   demo+zapier@sendsafely.net, demo+zapier@sendsafely.net

✉ **Subject** (required)

New Dropzone Submission from 🔒 Step 1   no-reply@sendsafely.com

✉ **Body (HTML or Plain)** (required)

You can place HTML in here and we will send it as is. If this is plain text, we will try to convert it to some very basic HTML for greater client compatibility.

Use the following link to access the uploaded files:

🔒 Step 1   https://demo.sendsafely.com/receive/?thread=T5VX-7WN9&packageCode=HUidWyc05f4hb5qo8u92sx4At0basNp7ck6n3kAwHiA#keyCode=kdXK3PuBPd3uPgTo2wpdU4qcxwd4Pd0gQ8h83UdrqU8
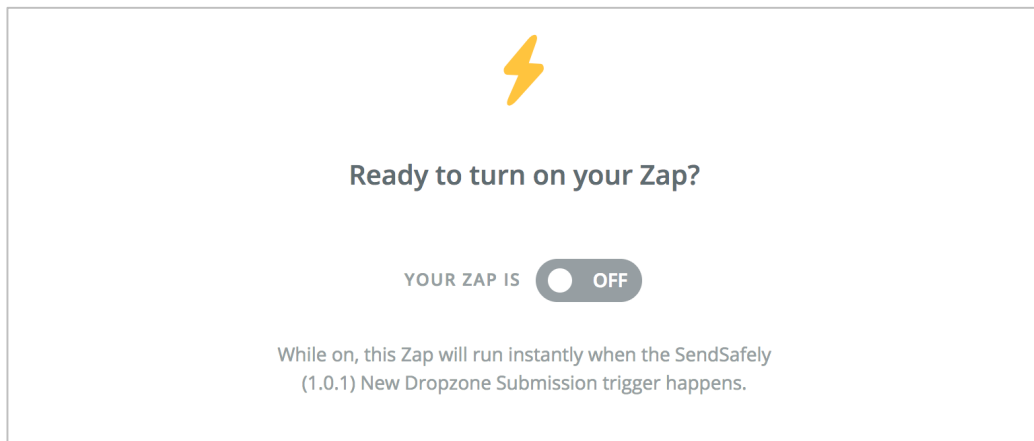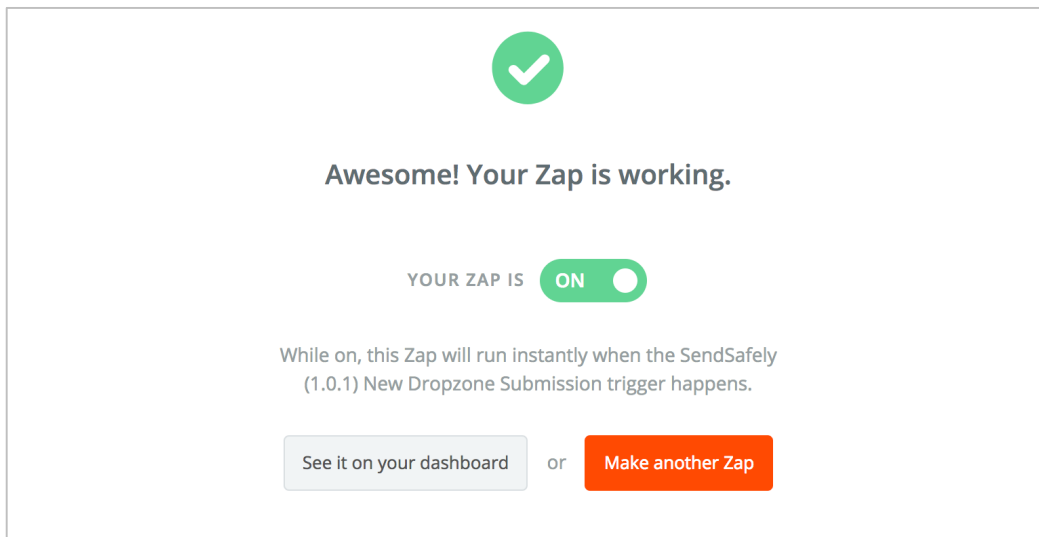

Note the following related to the example shown above:
- The "To" field was populated using the *Recipient Email Addresses* value (notificationEmails) from Step 1, which comes from the SendSafely App
- The "Subject" includes the *Submitter Email Address* value (submitterEmail) from Step 1
- The "Body" includes the *SendSafely Link* value (secureLink) from Step 1

The final step is to turn on your newly created Zap. Toggle the OFF switch when prompted as shown in the screen below.

⚡

Ready to turn on your Zap?

YOUR ZAP IS   ◯ OFF

While on, this Zap will run instantly when the SendSafely
(1.0.1) New Dropzone Submission trigger happens.

Once enabled, you'll see a green ON switch and a message indicating that the Zap is running.

✓

Awesome! Your Zap is working.

YOUR ZAP IS   ON ◯

While on, this Zap will run instantly when the SendSafely
(1.0.1) New Dropzone Submission trigger happens.

See it on your dashboard   or   **Make another Zap**

Now that the Zap is running, you should run a quick test to confirm everything is working as expected. To test, go to your Dropzone and submit a new file. If everything works, you should receive an email notification that includes a link to the uploaded files.

In the next example, we present a more complex action that shows how to update a specific Zendesk ticket. The example leverages the SubmitterInputValue to correlate the Dropzone Submission with a specific ticket in Zendesk.

Step 4(b) – Add a Zapier Action (Advanced Example)
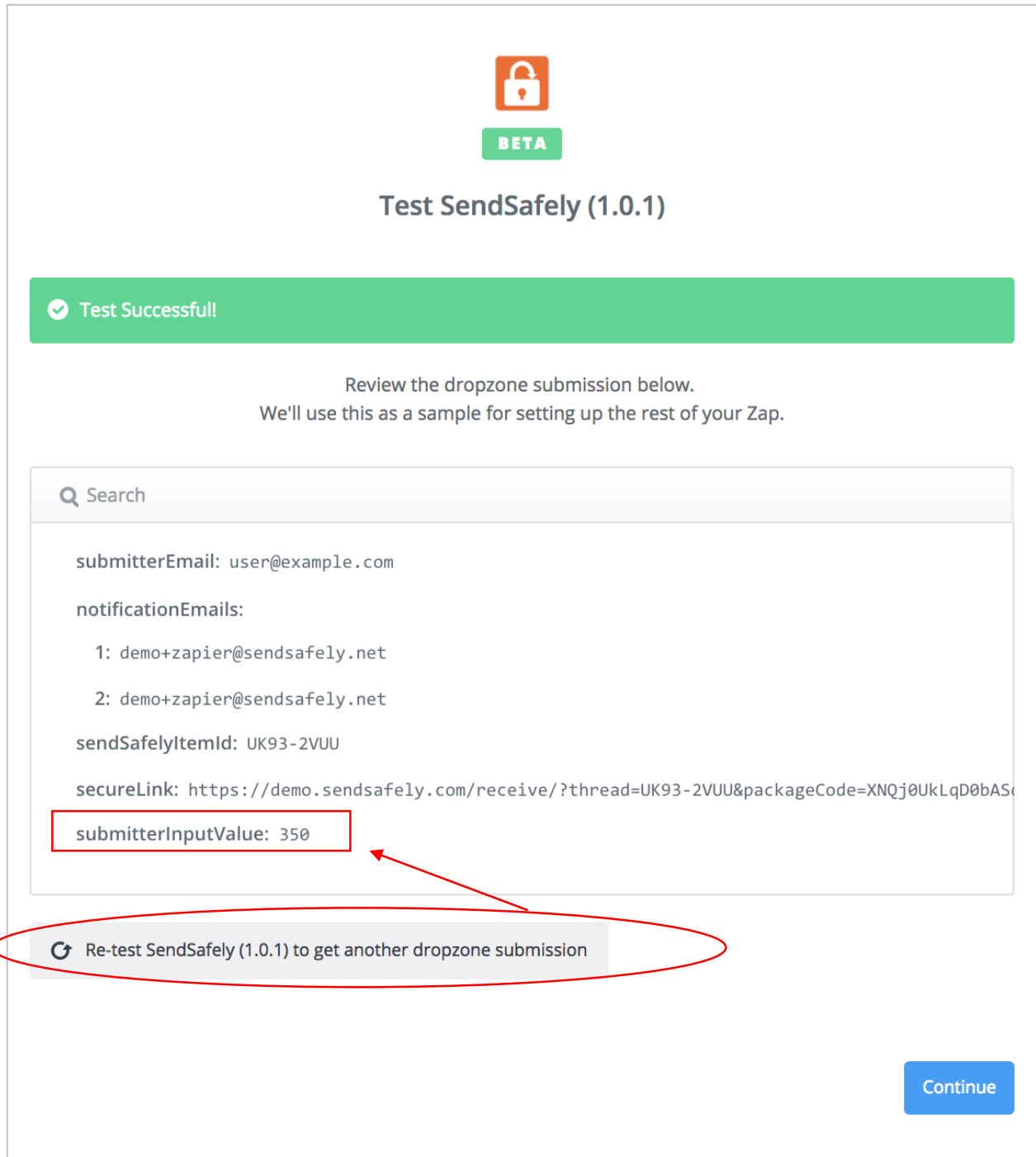
For more advanced Dropzone integrations, the *SubmitterInputValue* can be re-purposed look up a related record in another system (like a ticket in Zendesk). The first step for doing this to re-label the *Form Input Label* on your Hosted Dropzone configuration screen as shown below.

Once the input is re-labeled, you can browse to the Hosted Dropzone URL and confirm that the new label is rendered as shown below. You should also submit a file to the Dropzone using valid input, which in this example should include a valid Zendesk ticket Id (350).

Next, you'll want to run an updated test of the SendSafely Zapier app to retrieve a valid Dropzone Submission sample for use with Zendesk. If you had previously tested the SendSafely app already, go to "Test this Step" and press the "Re-test SendSafely" button as shown below.

After you re-run the test, use the "view your dropzone submission" link to view the new sample that includes a valid **submitterInputValue**.

Now that the SendSafely Trigger is updated, the next step is to link it to a new Action in Zendesk. The **Update Ticket** action can be used to update the target ticket with a link to the newly updated files.
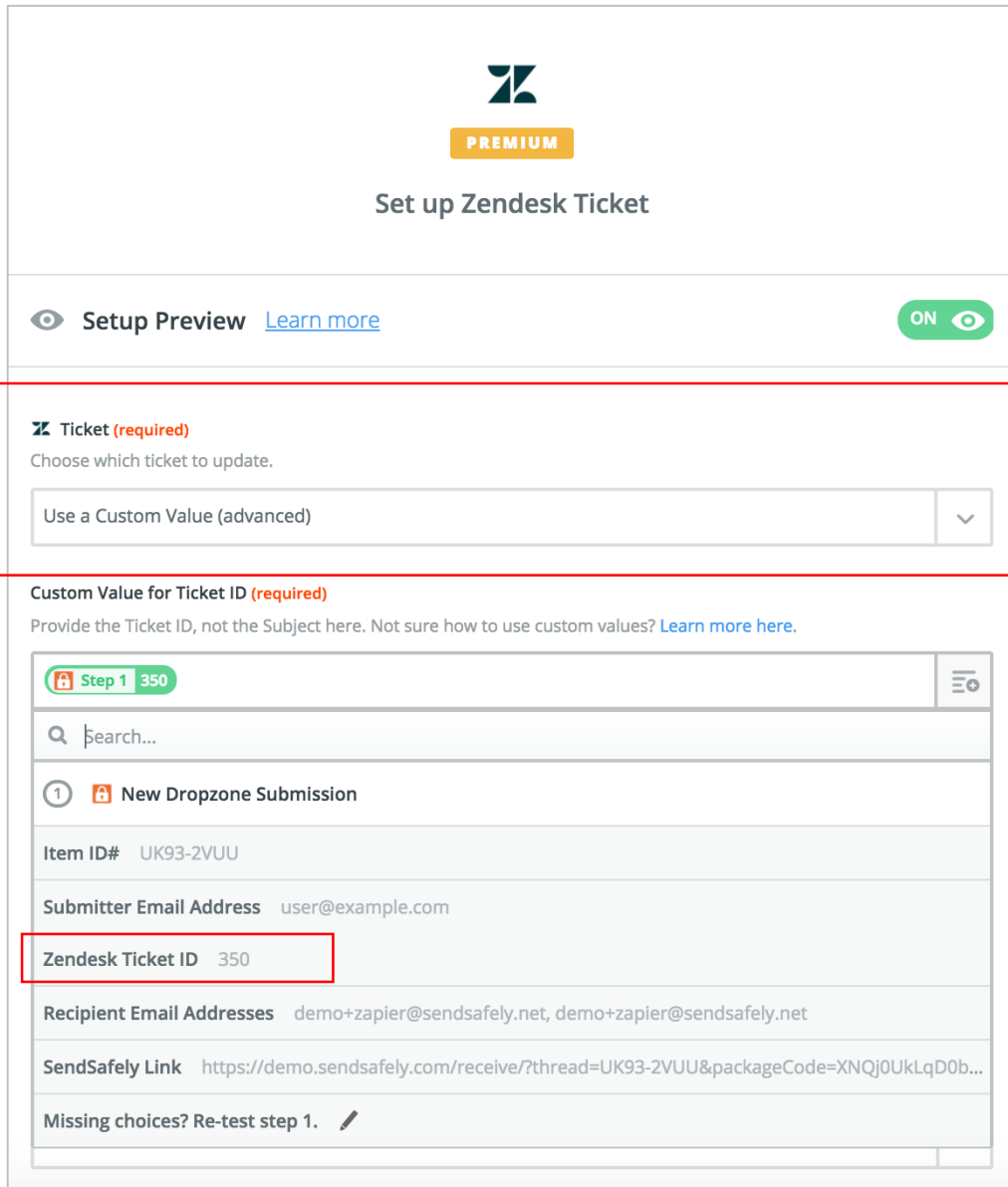
Select Zendesk Action

Search Zendesk Actions...

CREATE

○ **Attach File to Ticket**
Attach a file to an existing ticket.

○ **Create User**
Create a new user.

○ **Create Ticket**
Create a new ticket.

○ **Create Organization**
Create a new organization.

○ **Update User**
Update an existing user.

◉ **Update Ticket**
Update an existing ticket status or add comments.

○ **Add Tag(s) to Ticket**
Add one or more tags to an existing ticket.

The Update Ticket action requires a Ticket ID. Under Ticket, choose "Use a Custom Value" and then for the custom value, choose the Zendesk Ticket ID from Step 1 (the SendSafely app).
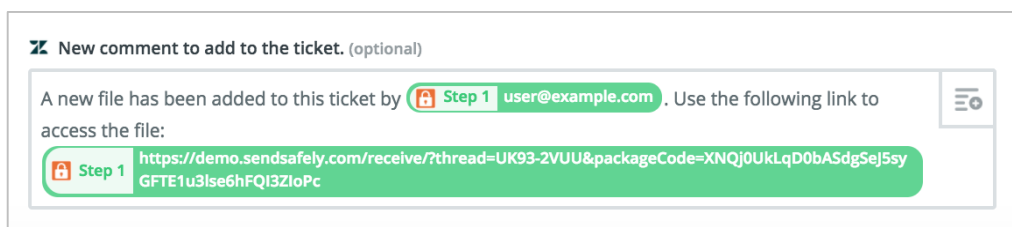

On the same screen, scroll down to "New comment to add to the ticket" and construct a comment that includes the SubmitterEmail and SecureLink values from Step 1 as shown below.

The final step is to test the Zendesk step to make sure the ticket gets updated with a link to the uploaded files. If the test succeeds, you should see an update in the Zendesk console that looks like the screen shown below.
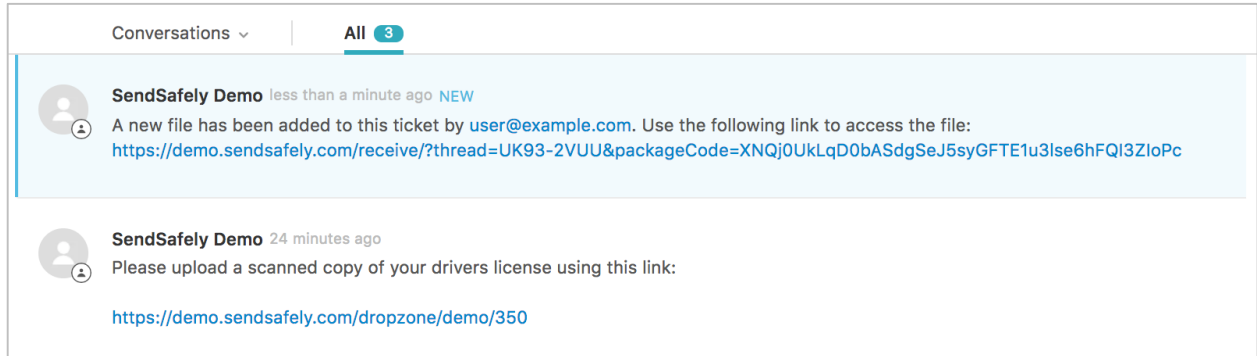
The Zendesk integration should now be working.

When directing users to the Dropzone for uploading a file, it is generally a good idea to pre-populate your lookup value by embedding it in the URL that you send the customer. The following screenshot shows how the Zendesk Ticket ID 350 can be pre-populated for the customer by appending it with a forward slash after the Dropzone URL.