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.

Settings	SendSafely Dropzone	0
count Profile		
gin Options	ON Validation Key:	
ntact Groups	Validation Key:	SHOW
PI Keys	Items submitted to this Dropzone will be accessible to the following recipients and expi	niro offer 5 dava :
Dropzone	demo+zapier@sendsafely.net (you)	ana o uays.
rusted Devices	Add a user email Add a Recipient 5 Change Expiration (da	ays)
achine Profile	Only allow files with certain extensions	
	Hosted Dropzone Page	0
	Hosted URL: https://demo.sendsafely.com/dropzone/demo%2Bzapier 8	
	Form Input Label: Full Name 🖋	
	Notification Settings: O Do not notify recipients	
	Notify recipients via email Alow access only from a Trusted Browser	
	Use a Webbook for notifications	

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.

Dashboard	→ Choose Trigger or <u>View Task Histo</u>	iry		*	YOUR ZAP IS
Add a note	TRIGGER 1. Set up this step C SendSafely (1.0.1) Choose Trigger	^		Select SendSafel	4
	Test this Step Rename Step		•	New Dropzone Submission Triggers when a new file is submitt	ed to your SendSafely Hosted Dropzone
*	ACTION 2. Set up this step	~			Save + Continue

After you press continue, you will need to connect the Zapier App to your Dropzone using the "Connect an Account" option.



Allow Zapier to access your SendSafely (1.0.1) Account?

Dropzone ID (required	Ŋ
Your Dropzone ID ca SendSafely Edit Profi	n be obtained from the Dropzone section of the le screen
Validation Key (require	red)
Your Validation Key of SendSafely Edit Profi	an be obtained from the Dropzone section of the le screen
SendSafely Hostnan	ne (required)
https://mycompa	ny.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.

$\underline{\text{Dashboard}} \rightarrow \text{Choose Account} \text{ or } \underline{\text{View Task History}}$	*	YOUR ZAP IS
 Name your zap Add a note TRIGGER 1. New Dropzone Submission ^ G SendSafely (1.0.1) ✓ New Dropzone Submission Choose Account Choose Account Test this Step ✓ Rename Step 	Search your SendSafely (1.0.1) Accounts) Account
• ACTION 2. Set up this step ~	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.

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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:

ø	Test Successful!
	Alright got it! You can view your dropzone submission to make sure everything looks OK. We'll use this as a sample for setting up the rest of your Zap.
C	Search
	submitterEmail: no-reply@sendsafely.com
	notificationEmails:
	1: demo+zapier@sendsafely.net
	2: demo+zapier@sendsafely.net
	sendSafelyItemId: T5VX-7WN9
	<pre>secureLink: https://demo.sendsafely.com/receive/?thread=T5VX-7WN9&packageCode=HUidWyc05f4h</pre>
	submitterInputValue: System Generated Dropzone Sample

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 relabeled 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	
 To (required) Can be a comma separated list of emails. Limited to 5. Step 1 demo+zapier@sendsafely.net, demo+zapier@sendsafely.net 	Ξo
Subject (required)	
New Dropzone Submission from Step 1 no-reply@sendsafely.com	Ξο
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 for greater client compatibility.	HTML
Use the following link to access the uploaded files: https://demo.sendsafely.com/receive/?thread=T5VX-7WN9&packageCode=HUidWyc05f4hb5qo8u92sx4 At0basNp7ck6n3kAwHiA#keyCode=kdXK3PuBPd3uPgTo2wpdU4qcxwd4Pd0gQ8h83UdrqU8	Ξο

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.



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.

ON	Dropzone ID: kZvKfbwhI51zdWimrKHdLYTkvnvDtrMXqAK98qrXeA0
	Validation Key:
line of the state	99 h
Items submitted to this Drop å demo+zapier@sendsafe	ozone will be accessible to the following recipients and expire after 5 days : ely.net (you)
Add a user email	Add a Recipient 5 Change Expiration (days)
Add a user ernall	Add a Recipient
Only allow files with certa	in extensions
Hosted Dropzone Page	
Hosted URL: https://dem	no.sendsafely.com/dropzone/demo%2Bzapier $ \phi^{\! 0}$
Form Input Label: Zendesk Ti	icket ID 🖋
Form input Laber. Zendesk II	
Notification Settings:	
Notification Settings:	

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).

Secure File Drop		
Use the form below to su For questions ple demo+zapier@se	ase contact	
Zendesk Ticket ID * 350		
Your Email Address *		
user@example.com		
B Drag files here	or click to add file	
Scanned_license.jpg	Completed x	
Subm	it	

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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.

	Test SendSafely (1.0.1)
Test Succes	ssful!
	Review the dropzone submission below. We'll use this as a sample for setting up the rest of your Zap.
Q Search	
submitterE	mail: user@example.com
notificatior	וEmails:
1: demo+	zapier@sendsafely.net
2: demo+	zapier@sendsafely.net
sendSafely	ItemId: UK93-2VUU
secureLink	: https://demo.sendsafely.com/receive/?thread=UK93-2VUU&packageCode=XNQj0UkLqD@
submitterl	nputValue: 350
Ct Re-test Sen	ndSafely (1.0.1) to get another dropzone submission

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.

	PREMIUM
	Select Zendesk Action
Searc	n Zendesk Actions
CREATE	
0	Attach File to Ticket Attach a file to an existing ticket.
0	Create User Create a new user.
0	Create Ticket Create a new ticket.
0	Create Organization Create a new organization.
0	Update User Update an existing user.
۲	Update Ticket Update an existing ticket status or add comments.
0	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).

S	et up Zendesk Ticket
• Setup Preview Learn more	
Z Ticket (required) Choose which ticket to update.	
Use a Custom Value (advanced)	
Custom Value for Ticket ID (required) Provide the Ticket ID, not the Subject here. No	t sure how to use custom values? Learn more here.
Custom Value for Ticket ID (required) Provide the Ticket ID, not the Subject here. Not	t sure how to use custom values? Learn more here.
Custom Value for Ticket ID (required) Provide the Ticket ID, not the Subject here. No	t sure how to use custom values? Learn more here.
Custom Value for Ticket ID (required) Provide the Ticket ID, not the Subject here. Not Step 1 350 Q bearch	It sure how to use custom values? Learn more here.
Custom Value for Ticket ID (required) Provide the Ticket ID, not the Subject here. Not Step 1 350 Q βearch ① Provide the Ticket ID, not the Subject here. Not New Dropzone Submission	
Custom Value for Ticket ID (required) Provide the Ticket ID, not the Subject here. Not Step 1 350 Q βearch ① C New Dropzone Submission Item ID# UK93-2VUU	
Custom Value for Ticket ID (required) Provide the Ticket ID, not the Subject here. No Step 1 350 Q βearch ① ① ② New Dropzone Submission Item ID# UK93-2VUU Submitter Email Address user@examp Zendesk Ticket ID 350	

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.

X New comment to add to the ticket. (optional)	
A new file has been added to this ticket by Step 1 user@example.com. Use the following link to access the file:	Ξο
Step 1 https://demo.sendsafely.com/receive/?thread=UK93-2VUU&packageCode=XNQj0UkLqD0bASdgSej5sy GFTE1u3lse6hFQI3ZloPc	

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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.

	Conversations V All 3
e	SendSafely Demo less than a minute ago NEW A new file has been added to this ticket by user@example.com. Use the following link to access the file: https://demo.sendsafely.com/receive/?thread=UK93-2VUU&packageCode=XNQj0UkLqD0bASdgSeJ5syGFTE1u3lse6hFQI3ZIoPc
	SendSafely Demo 24 minutes ago Please upload a scanned copy of your drivers license using this link: https://demo.sendsafely.com/dropzone/demo/350

The Zendesk integration should now be working.

When directing users to the Dropzone for uploading a file, it is generally a good idea to prepopulate 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.

• • • SendSafely Dropzone ×				
\leftarrow \rightarrow C \triangleq Secure	https://demo.sendsafely.com/dropzone/demo%252Bzapier/350	☆ 🍐 :		
	iny			
	Secure File Drop			
	Use the form below to submit encrypted files. For questions please contact demo+zapler@sendsafely.net.			
	350			
	/our Email Address *			
	Drag files here or click to add file			
	Submit			