

How To: Connect Facebook Leads To Email or CRM

Using Zapier

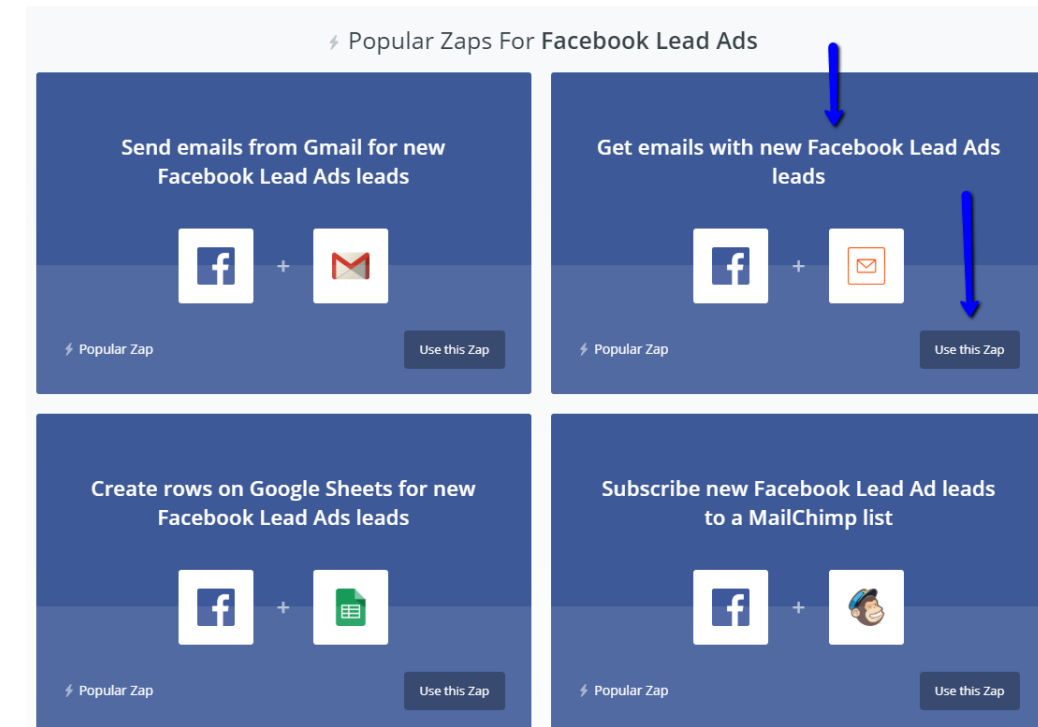
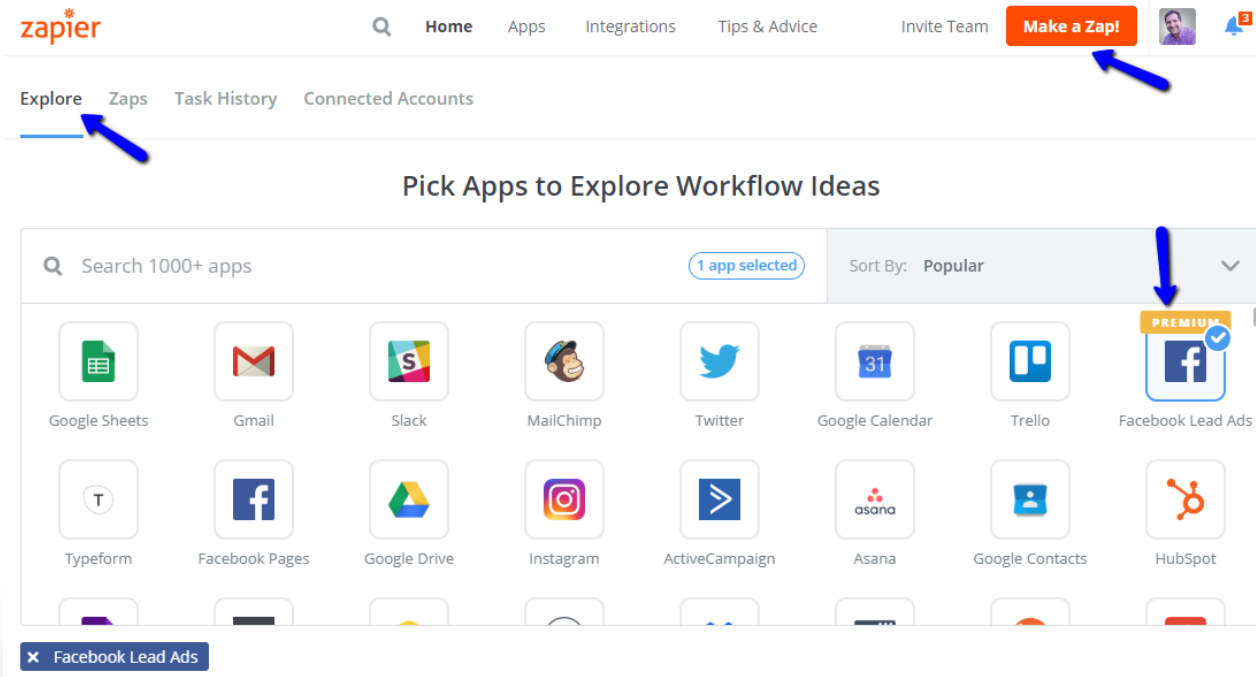
Setting Up Zapier

- <https://zapier.com/>
- Set up your account

Setting Up Connection

You can find the connections you need by exploring.
You can also scroll further down, and use the templates
Ready for you to use and edit. To create new click on Make a Zap!

Templates – Ready to use, Gmail, Email, Mailchimp...



Choose A Trigger App

Name your Zap: (use campaign name)
Find Facebook Lead Ads trigger

The image displays three sequential screenshots of the Zapier interface:

- First Screenshot:** The 'Name your zap' step. A blue arrow points to the text input field where the user is prompted to name their Zap.
- Second Screenshot:** The 'Choose a Trigger App' step. A blue arrow points to the search bar, and another blue arrow points to the 'Facebook Lead Ads' app in the list of available triggers.
- Third Screenshot:** The 'Select Facebook Lead Ads Trigger' step. A blue arrow points to the 'Save + Continue' button at the bottom right of the screen.

Select and Connect: Facebook Ad Account

Since this will be a new account for you, you start by connecting your ad account. It ask you to log in to your Facebook and will populate your account. You can always add more, test, or disconnect accounts too.

The screenshot displays the Zapier 'Choose Account' interface. On the left, a sidebar contains navigation icons for Facebook, Email, and Help. The main content area is titled 'Connect Facebook Lead Ads + Zapier' and includes a search bar for existing accounts. Three existing accounts are listed: 'Facebook Lead Ads Toby', 'Facebook Lead Ads 39 Celsius', and 'Facebook Lead Ads Lizeth Coronado'. A blue arrow points to the 'Connect an Account' button at the bottom of this section. To the right, a dropdown menu is open, showing a list of services to connect, including Google Sheets, Gmail, Slack, MailChimp, Twitter, Google Calendar, Trello, Facebook Lead Ads, and Tymeform. A blue arrow points to the search input in this dropdown. On the far right, the 'Connected Accounts' tab is selected in the top navigation, and a list of connected accounts is visible, each with 'Test', 'Reconnect', and 'Disconnect' buttons. Blue arrows point to these buttons.

Connect your page

Search for name of your page, if you have multiple pages, select the page you are running lead ads on

Connect Facebook Lead Ads + Zapier
We need permission to connect to your Facebook Lead Ads account to trigger this Zap.

Search your Facebook Lead Ads Accounts...

- Facebook Lead Ads Toby
added 2 years ago, used in 0 Zaps
- Facebook Lead Ads 39 Celsius
Lorena Gutierrez de Olsen added 4 months ago, used in 7 Zaps
- Facebook Lead Ads Lizeth Coronado
Lizeth Coronado added 3 months ago, used in 2 Zaps

Connect an Account

Save + Continue

Set up Facebook Lead Ads Lead

Page (required)


Don't see your Page listed below? You were probably granted admin access after you added your Facebook Account to Zapier. Re-add your account to view it below.

Search...


[List of Facebook Pages]

Connecting Lead Forms

Search for the lead form you are collecting data on your ads



PREMIUM

Set up Facebook Lead Ads Lead

 Page (required)


Don't see your Page listed below? You were probably granted admin access after you added your Facebook Account to Zapier. [Re-add your account](#) to view it below.

Wonderate Mortgage ▼


 Sellers ▼

Q Search...

Get Realtime Quote Now	1847372321998171
Pre-Approval Template-copy	297579374122276
Pre-Approval Template	288114521763481
Cash-Out Can Be A Good Option-copy-copy	203333923684340
Cash-Out Can Be A Good Option-copy	660297727657423



PREMIUM

Set up Facebook Lead Ads Lead


 Page (required)


Don't see your Page listed below? You were probably granted admin access after you added your Facebook Account to Zapier. [Re-add your account](#) to view it below.

Raul Navarro. Realtor ▼

 Form (optional)

Sellers ▼

 Refresh Fields

 Continue

Test your zap



Pick A Sample To Set Up Your Zap

Follow the instructions below to pull in your samples.



Please create a lead in Facebook Lead Ads so we can pull it in as a sample to set up your Zap.

We'll check for samples in your Facebook Lead Ads Lizeth Coronado account (Lizeth Coronado)

[Load in Samples](#)

[Skip Test & Continue](#)



Pick A Sample To Set Up Your Zap

Here are samples from your Facebook Lead Ads Lizeth Coronado Lizeth Coronado account.

Pick 1 to set up your zap. [Learn more.](#)

- Lead A**
Pulled in 2 seconds ago
- Lead B**
Pulled in 2 seconds ago
- Lead C**
Pulled in 2 seconds ago

[Get More Samples](#)

[Continue](#)



Set Up Notification

Set up to receive email notification when you get new lead

The screenshot shows the Zapier workflow editor. On the left, a workflow is being built with two steps: '1. TRIGGER' (New Lead) and '2. ACTION' (Set up this step). Blue arrows point to the 'New Lead' trigger, the plus sign between steps, and the 'Set up this step' action. The 'Choose an Action App' panel is open, displaying a search bar and two categories of apps: 'YOUR APPS' and 'BUILT-IN APPS'. The 'Email' app is highlighted in the 'BUILT-IN APPS' section. A blue arrow points from the 'Set up this step' action to the 'Email' app icon.

1. TRIGGER ✓
New Lead

2. ACTION
Set up this step
Choose App
Choose Action
Set Up Template
Test this Step

+ Add a Step

Choose an Action App

Search hundreds of apps...

YOUR APPS

- Teachable
- Google Drive
- Infusionsoft (PREMIUM)
- Gmail
- Slack
- SharpSpring
- MailChimp
- ClickFunnels

show all

BUILT-IN APPS

- Email
- RSS
- SMS
- Digest

The screenshot shows the configuration screen for the 'Send Outbound Email' action. It features an envelope icon at the top and a 'CREATE' section with a single configuration item: 'Send Outbound Email' with the description 'Send an email from your own custom zapiermail.com address.' A blue arrow points to the 'Save + Continue' button at the bottom right.

Select Email by Zapier Action

CREATE

- Send Outbound Email
Send an email from your own custom zapiermail.com address.

Save + Continue

Set Up Email Template

Complete the outbound email with all the lead details in the body field

To (required)
Can be a comma separated list of emails. Limited to 5.

enter your email here

Subject (required)
Facebook Lead - (from which campaign)

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.

*This is where the details of your lead will be ---> add fields on this button

Search...

1	New Lead
Email	fernandez.ruben@gmail.com
Full name	Mary Chris Gutierrez-Fernandez
Phone Number	+16029974711
ID	2219571850
Created Time	2018-06-09T02:42:06+0000
Ad ID	23842957359240208
Adset Name	Sellers
Campaign Name	Lead generation
Ad Name	Sellers - Ad2

Setup Preview [Learn more](#) ON

To (required)
Can be a comma separated list of emails. Limited to 5.

enter your email here

Subject (required)
Facebook Lead - (from which campaign)

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.

*This is where the details of your lead will be ---> add fields on this button

Step 1 fernandez.ruben@gmail.com Step 1 Mary Chris Gutierrez-Fernandez

Attachment (optional)
A file object to be attached to the email. Plain text content will converted into a txt file and attached. Please note, if the file is over ~10mb or so, you should explore using other email sending techniques (like Gmail or SMTP).

From Name (optional)
This will be your "display name" when sending. *Want to send from your own email address? Try Mailgun, IMAP, Mandrill or Gmail apps instead.*

From Name (optional)
This will be your "display name" when sending. *Want to send from your own email address? Try Mailgun, IMAP, Mandrill or Gmail apps instead.*

Reply To (optional)
Specify a reply address other than your own.

Cc (optional)
Can be a comma separated list of emails. Limited to 5.

Bcc (optional)
Can be a comma separated list of emails. Limited to 5.

Force Linebreaks? (optional) Yes No
Set this to "yes" if your emails are received without line breaks or spacing.

Preview and Test Email

SAMPLE:

Q Search...

To: enter your email here

Subject: Facebook Lead - (from which campaign)

Body (HTML or Plain Text): *This is where the details of your lead will be ---> add fields on this buttonfernandez.ruben@gmail.comMary Chris Gutierrez-Fernandez

Attachment:

From Name:

Reply To:

Cc:

Bcc:

Force Linebreaks?: false

EMPTY FIELDS:

Attachment: empty (optional)

From Name: empty (optional)

Reply To: empty (optional)

Cc: empty (optional)

Bcc: empty (optional)

Skip Test

Send Test To Email by Zapier

Test was successful! We'll use this as a sample for setting up the rest of your Zap.

A Test outbound email was sent to Email by Zapier about 22 seconds ago.

SAMPLE FROM EMAIL BY ZAPIER:

Q Search...

value: null

Re-test This Step

Add a Step OR Finish

Awesome! Your Zap is working.

We recommend giving your Zap a name.

Facebook Ads - Example

YOUR ZAP IS ON

While on, this Zap will run instantly when the Facebook Lead Ads New Lead trigger happens.

See it on your dashboard OR Make another Zap

***Make sure you turn your zap on**

Ads-Done-For-You Service

- Recap: You can set up a zap for each campaign, you can also set up emails to automatically be sent out to your leads, via your CRM or an email automation i.e., MailChimp. If you are interested in having your Facebook Ads managed and optimized by us, feel free to give us a call.
- Email: Info@39Celsius.com
- Phone: 866-202-6412
- Or visit: www.39celsius.com