

VOICEBASE SET UP GUIDE FOR ZAPIER

Action

Use the VoiceBase App Invitation Link to get started.





2 Sign In or Sign Up

To start using Zapier, you need a Zapier account. Either sign in or sign up for an account using your email address. If you are creating a new account, do that first then come back and click on the VoiceBase Zapier App Invitation again and proceed by logging in.





MAKE A ZAPI Bryon Mathias V A



Once logged in, click on the 'Make a Zap' link on the top right of the screen. zapier we're hiringt

4 Choose Native App Trigger and VoiceBase Action

Choose a trigger app you would like to have sync with your VoiceBase app. In the example below, we chose Google Drive. Keep in mind that not all native apps have file support, but most storage apps like Google Drive, Amazon S3, and SugarSync will work. Because VoiceBase takes in audio files the trigger app must have file support. You will see some additional option fields for the trigger app. For this example we will be using 'New File in Folder' for a Google Drive. This means whenever a new file is added to a specific folder in my Google Drive account, upload that file into my VoiceBase account. Click 'Save + Continue' to proceed.

| shboard Choose Trigger | | * | YOUR ZAP IS |
|---|------------|--|------------------------------|
| Aame your Zap d a note THESEEN 1. Set up this step Google Drive | ^ + | Select Google Drive Trigg | er |
| Choose Trigger Test this Step | | Search Google Drive Triggers | |
| 🖌 Rename Step | | New File in Folder Triggers when a new file is added directly to a specific fold | er (but not its subfolders). |
| Action | | New File Triggers when any new file is added (inside of any folder). | |
| 2. Set up this step + | č – K | show less common options | Save + Continue |
| | | | |
| | | | |
| Get Help Response Time: -2h M-F 9am-5pm P | | | |

5 Connect your Trigger App

For this example we logged into a Google Account to give Zapier access to Google Drive. Once you have logged in successfully you will be able to continue. Different apps will have slightly different Trigger App Authentication steps.



6 Choose Your Google Drive Folder

Use this dropdown to choose your Google Drive Folder.



Test Google Drive Trigger

First add a sample audio file to the Google Drive Folder you chose in step 6. Then click Fetch & Continue.

| Dashboard | → Test this Step | | * | YOUR ZAP IS | 0 | OFF |
|-------------------------|---|-----|--|-------------|---|-----|
| / Name yo Add a note | | | 4 | | | |
| | TRISGER 1. New File in Folder Google Drive New File in Folder Google Drive bryon@voicebas | ^ | Test Google Drive Test your Google Drive trigger by fetching an existing file. | | | |
| | Edit Options Test this Step Rename Step | | THINGS TO DOUBLE-CHCC: Maie sure you have at least one recent file created. Maie sure it matches the brigger options you picked below: | | | |
| * | ACTION 2. Set up this step | ^ | Folder Zapler | _ | | |
| | Choose App Choose Action Set Up Template Test this Step | | Fear & C | sitinue | | |
| 🗰 Get He | Rename Step Response Time: -2h M-F 9am-Spm | PST | | | | |

8 Choose VoiceBase as your Action

Use the search to find VoiceBase Speech Transcription and Analytics Action



9 Authenticate with VoiceBase

Enter your bearer token here to authenticate with VoiceBase. To get a bearer token sign up at the VoiceBase developer portal.



10 Choose VoiceBase Action Options

The first required field is a VoiceBase configuration. You can create a custom configuration or use the default configuration. VoiceBase has many different features that can be defined here. To quickly generate a custom configuration use the Helper Tool at the top of this page. For a more in depth look at VoiceBase features you can check out the VoiceBase Documentation.

*The Media field is also required. You should choose 'File (exists but not shown)' or a url to the recording.



11 Test VoiceBase Action

On this screen click 'Skip Test & Continue'. The Zap will still work even though you skip the test.



12 Name your Zap and Turn it On!

Congratulations! Just name your Zap, turn it on, and you are now integrated!



Trigger

Use the VoiceBase App Invitation

Link to accept the VoiceBase app if you haven't already https://zapier.com/developer/invite/71467/c8c262e0c2caf1d2f-600fe91cf8c5abf/



zapier

2 Sign In or Sign Up

To start using Zapier, you need a Zapier account. Either sign in or sign up for an account using your email address. If you are creating a new account, do that first then come back and click on the https://zapier.com/developer/ invite/71467/c8c262e0c2caf1d2f-600fe91cf8c5abf/ again and proceed by logging in.

eed a Zapier gn up for il address. ccount, do nd click eveloper/ f1d2fd proceed by

3 Create a Zap Once logged in, click on the 'Make a Zap!' link on the top right of the screen.







5 Choose Job Finished at VoiceBase



6 Authenticate with VoiceBase

Enter your bearer token here to authenticate with VoiceBase. To get a bearer token sign up at the VoiceBase developer portal.



7 Copy your Webhook and add it as a callback in your upload configuration for any jobs which you would like the Zap trigger to listen to.

Important - If you plan to use the Zapier action and trigger you will need to add this webhook to configuration when setting up your VoiceBase action.

Your action configuration might look like this,

{ "configuration": { "language" : "en-US", "publish": {"callbacks": [{"url" : "Enter-Webhook-Here","method" : "POST","include" : ["transcripts", "keywords", "topics", "predictions", "metadata"]}]}}



Once you click "Ok, I did this", Zapier will wait for a callback to be sent to the webhook you were just provided.

To make sure your jobs are properly sending callbacks to that webhook, you could run a job through VoiceBase now

| Control C | |
|---|--|
| Make sure you've followed the setup instructions below. | |
| | |
| Use this: | |
| | |
| https://hooks.zapier.com/hooks/tatch/2416637/rorr Copy to diploant | |
| S If you haven't yet, go create a brand new job. | |
| 24 | |
| $_{\rm AVC}$ Looking for the job, this might take a sec | |
| | C if you haven't yet, go create a brand new job. |

and Zapier will verify it is receiving the VoiceBase callback. This is required if you setting any custom configuration to receive anything beyond transcription back from VoiceBase. If you are setting any custom metadata this is also required.

Alternatively, if you would like to skip this step (you must be only receiving transcript and this also assumes your configuration JSON is correct), send any http request to that webhook. The simplest way would be to enter the webhook into a web browser.

Note for VoiceBase internally - We are brainstorming the best way to expose this to end users. Maybe we will setup a simple web page with some tools that makes this part simpler...

| ashboard Test this Step | | * | YOUR ZAP IS | 0 06 |
|--|---|---|-------------|------|
| VoiceBase Speech TranscriptL. Job Finished at VoiceBase | ^ | Test VoiceBase Speech Transcription and Analyt | ics | |
| Velocidese Speech Transcripti os Set Up Webhook Tost this Step Rename Step | | Inst Successful Aright gal it that can view your job to invite sure everything looks O We'l use this as a simple for acting up the rest of your Zap. In test Vicelakes Speech Transcription and Analytics to gal anther job | κ. | |
| * Action 2. Set up this step | • | | Continue | |
| * | | | | |

9 Select your action app

In this example we will use Google Drive



10 Choose action

In this example we will Create File from Text to create a .txt file of the VoiceBase transcript. Different action apps will have different actions to choose from.



11 Authenticate with Google Drive



12 Choose action options

Different actions will have different options.

For this example we chose a folder where the transcript will be created in Google Drive, we named the transcript by the original recording's filename, we chose the text version of the transcript from VoiceBase (srt and others are also available), and we chose convert to document yes.

Here is some general information about the action option dropdown values from VoiceBase,

The most commonly used metadata values are

- Media Metadata Extended Filename (The recording's filename)
- Media Metadata Extended Date
- Media Metadata External ID (Unique
- ID for the job)

Note: In order to use those values, they must be added while the recording is being sent to VoiceBase. That can be setup in the VoiceBase action in Zapier, or if jobs are being sent to VoiceBase outside of Zapier, any extended metadata fields will be passed through into this dropdown.

The most commonly used values are, - Media Transcripts Text (transcription text)

Media Transcripts SRT (transcript srt)
 Media Transcripts Webvtt (transcript webvtt)



13 Click Skip Test and Continue



14 Name your Zap and turn it on!

