

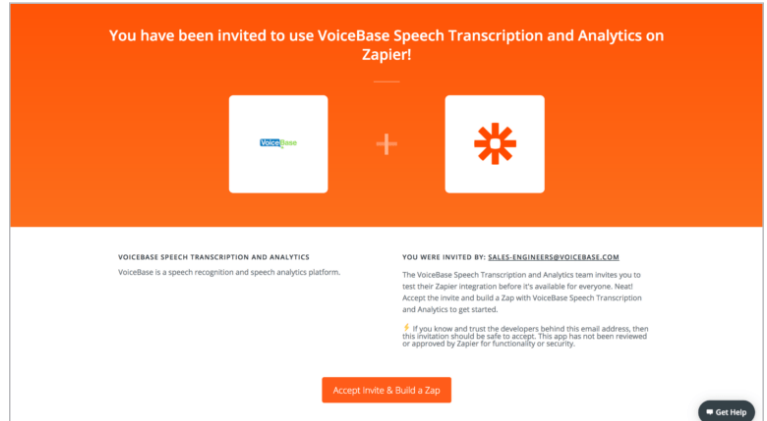
VOICEBASE  
SET UP GUIDE  
FOR ZAPIER

## Action

# 1

Use the VoiceBase App Invitation Link to get started.

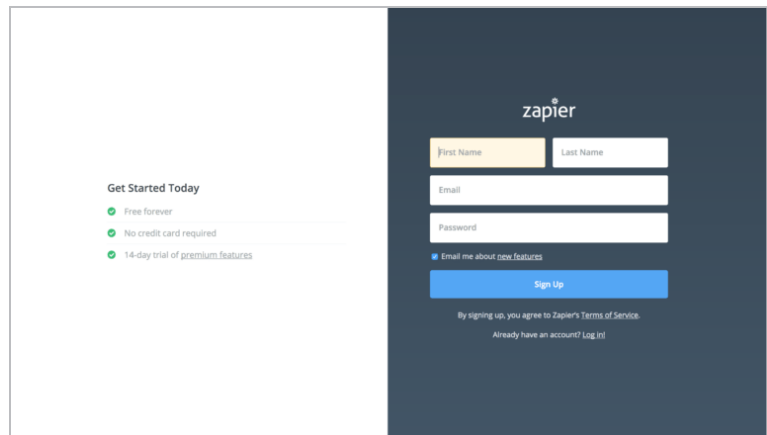
Click here to get started with the VoiceBase Zapier Private App.



# 2

Sign In or Sign Up

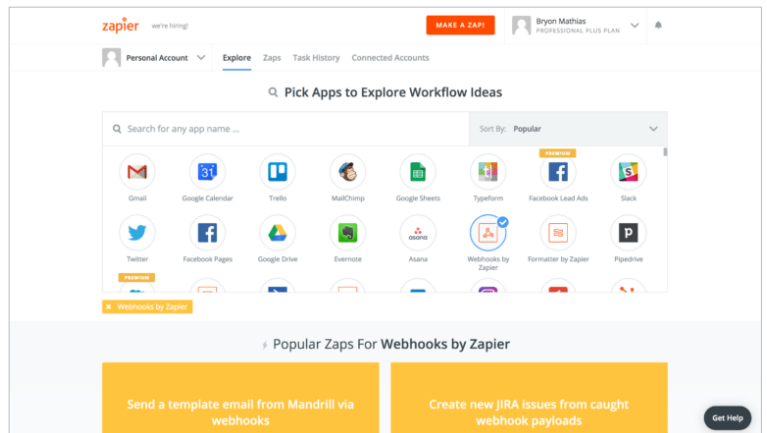
To start using Zapier, you need a Zapier account. Either sign in or sign up for an account using your email address. If you are creating a new account, do that first then come back and click on the VoiceBase Zapier App Invitation again and proceed by logging in.



# 3

Create a Zap

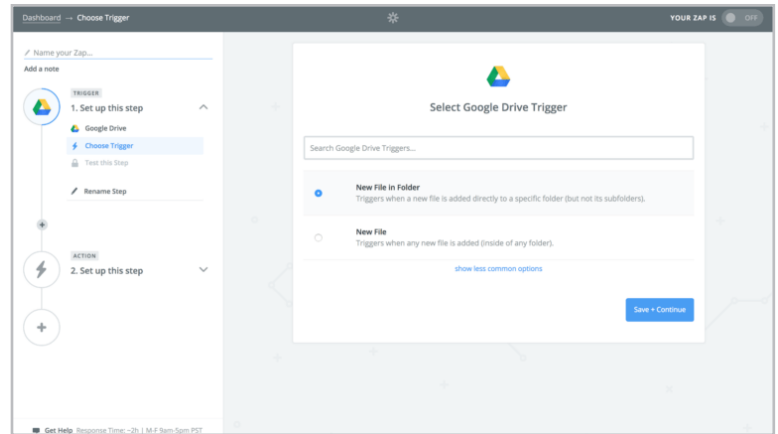
Once logged in, click on the 'Make a Zap' link on the top right of the screen.



## 4

### Choose Native App Trigger and VoiceBase Action

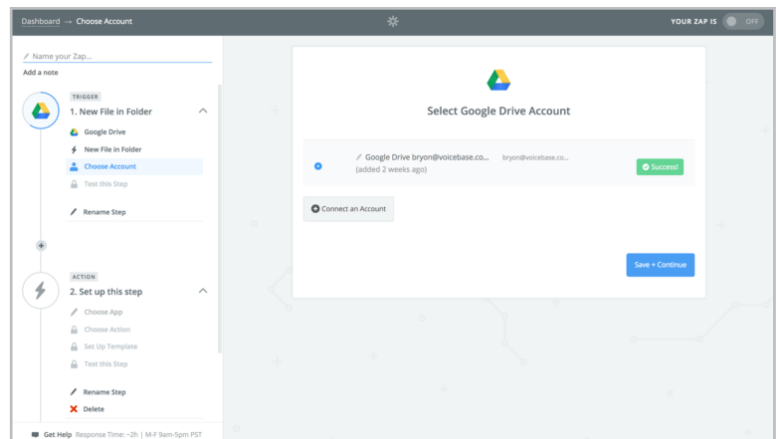
Choose a trigger app you would like to have sync with your VoiceBase app. In the example below, we chose Google Drive. Keep in mind that not all native apps have file support, but most storage apps like Google Drive, Amazon S3, and SugarSync will work. Because VoiceBase takes in audio files the trigger 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.



## 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.

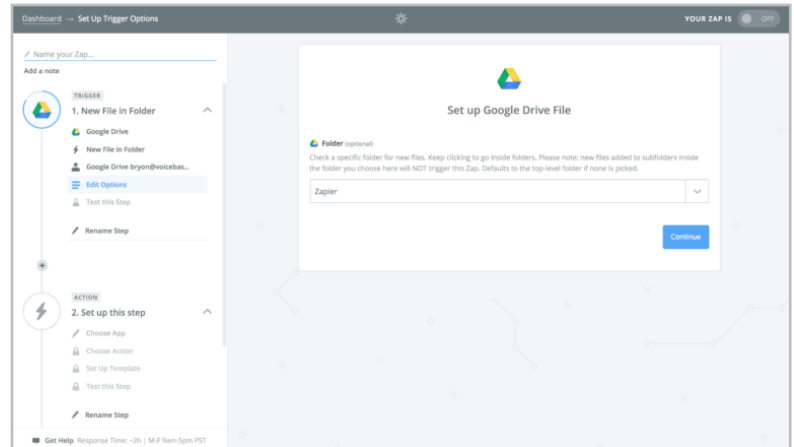


# ZAPIER SET UP GUIDE

## 6

### Choose Your Google Drive Folder

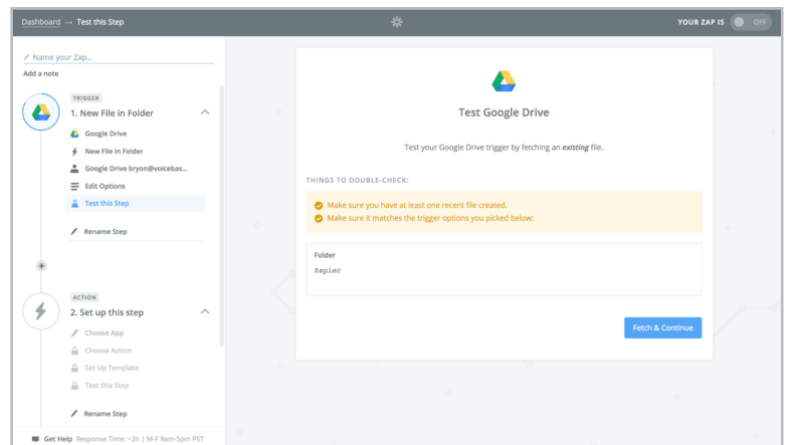
Use this dropdown to choose your Google Drive Folder.



## 7

### Test Google Drive Trigger

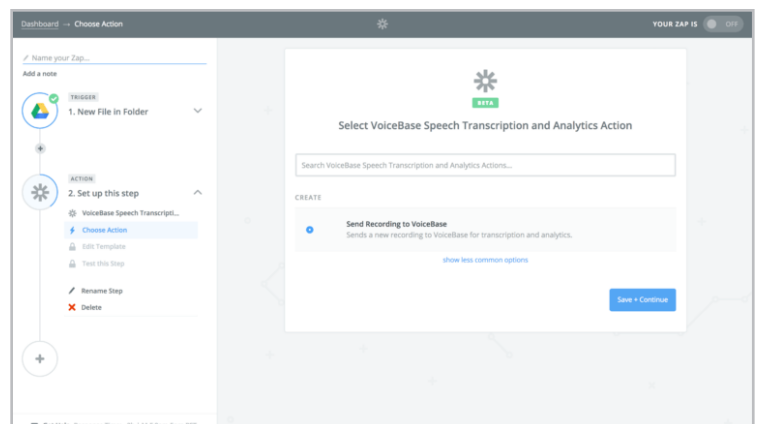
First add a sample audio file to the Google Drive Folder you chose in step 6. Then click Fetch & Continue.



## 8

### Choose VoiceBase as your Action

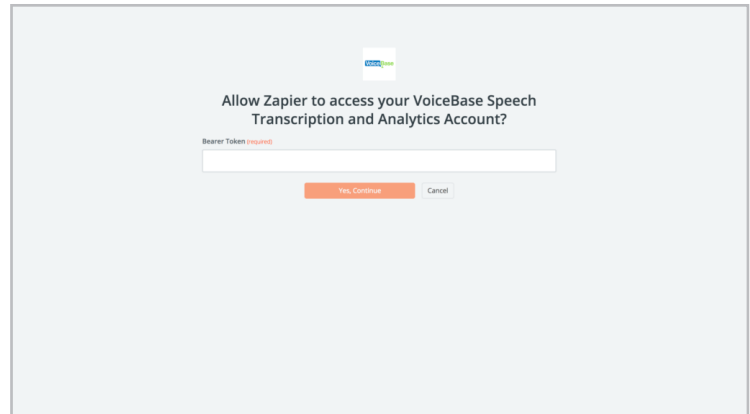
Use the search to find VoiceBase Speech Transcription and Analytics Action



## 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.

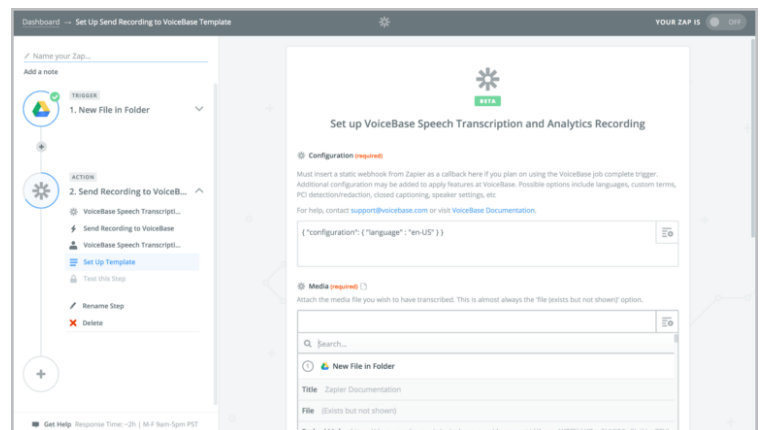


## 10

### 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.

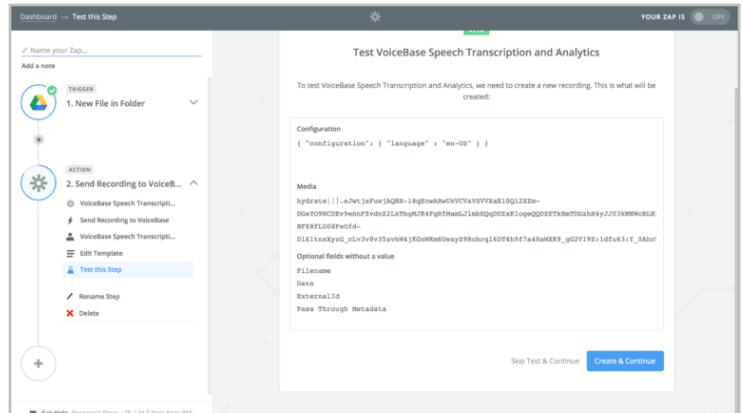
*\*The Media field is also required. You should choose 'File (exists but not shown)' or a url to the recording.*



## 11

### Test VoiceBase Action

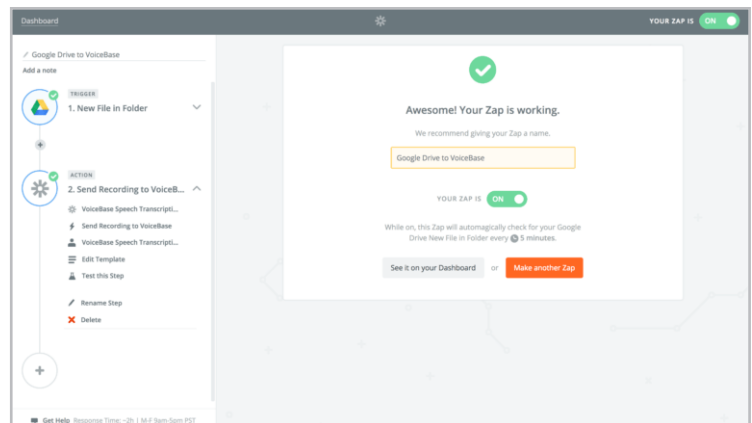
On this screen click 'Skip Test & Continue'. The Zap will still work even though you skip the test.



## 12

### Name your Zap and Turn it On!

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



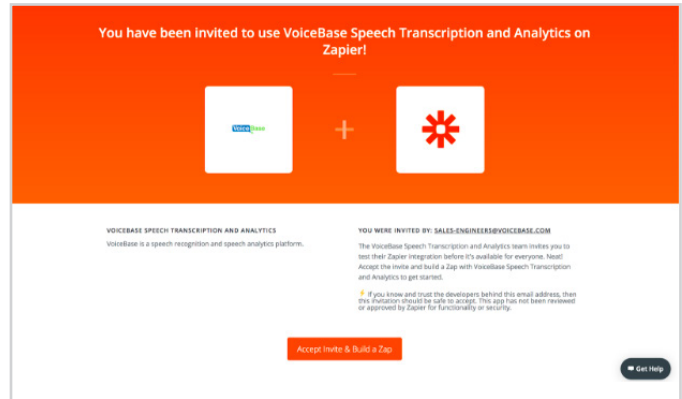
## Trigger

### 1

#### Use the VoiceBase App Invitation

Link to accept the VoiceBase app if you haven't already

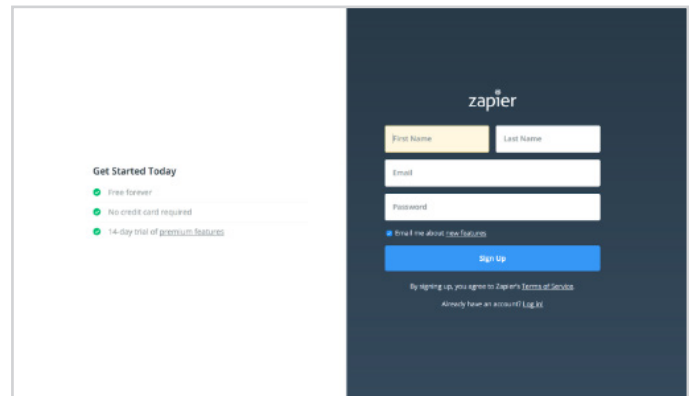
<https://zapier.com/developer/invite/71467/c8c262e0c2caf1d2f-600fe91cf8c5abf/>



### 2

#### Sign In or Sign Up

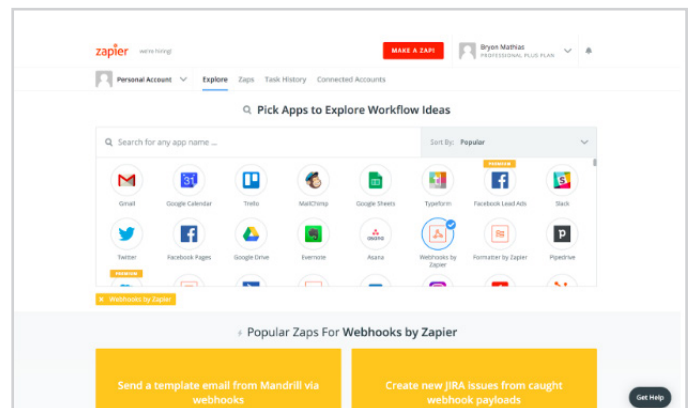
To start using Zapier, you need a Zapier account. Either sign in or sign up for an account using your email address. If you are creating a new account, do that first then come back and click on the <https://zapier.com/developer/invite/71467/c8c262e0c2caf1d2f-600fe91cf8c5abf/> again and proceed by logging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



### 3

#### Create a Zap

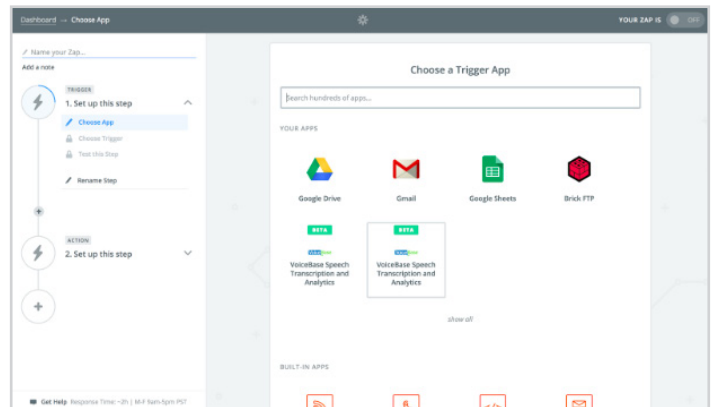
Once logged in, click on the 'Make a Zap!' link on the top right of the screen.



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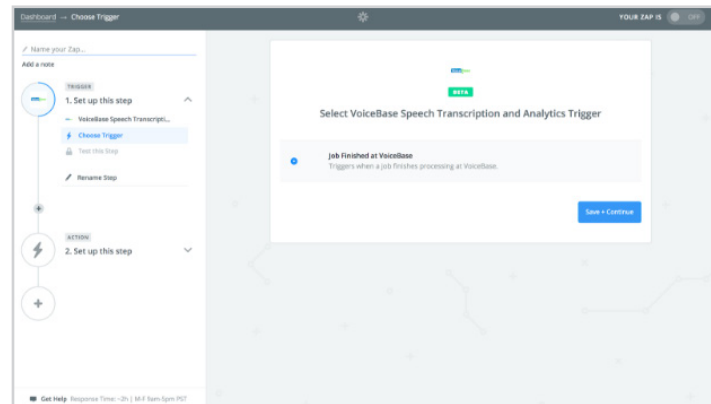
## 4

### Choose VoiceBase Trigger



## 5

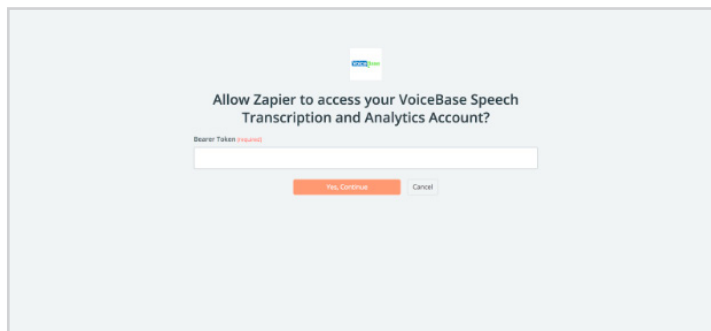
### Choose Job Finished at VoiceBase



## 6

### Authenticate with VoiceBase

Enter your bearer token here to authenticate with VoiceBase. To get a bearer token sign up at the <https://apis.voicebase.com/developer-portal/> VoiceBase developer portal.





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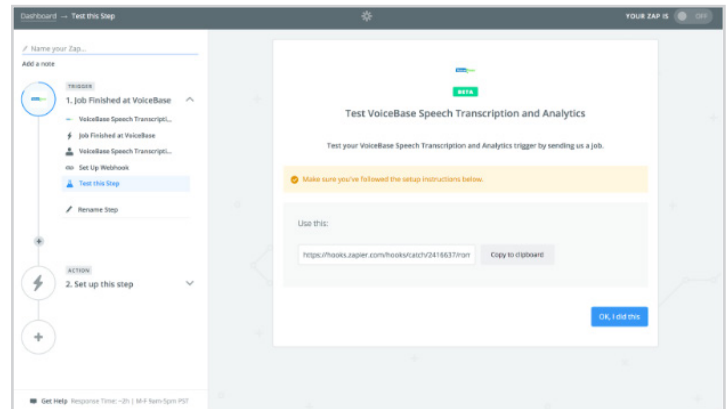
## 7

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,

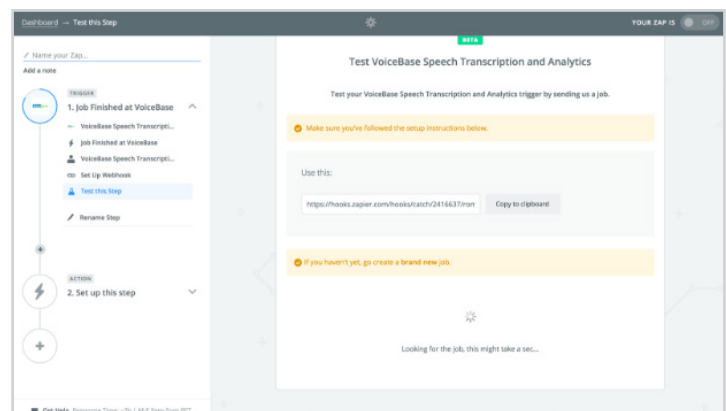
```
{ "configuration": { "language": "en-US", "publish": { "callbacks": [ { "url": "Enter-Webhook-Here", "method": "POST", "include": [ "transcripts", "keywords", "topics", "predictions", "metadata" ] } ] } }
```



## 8

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

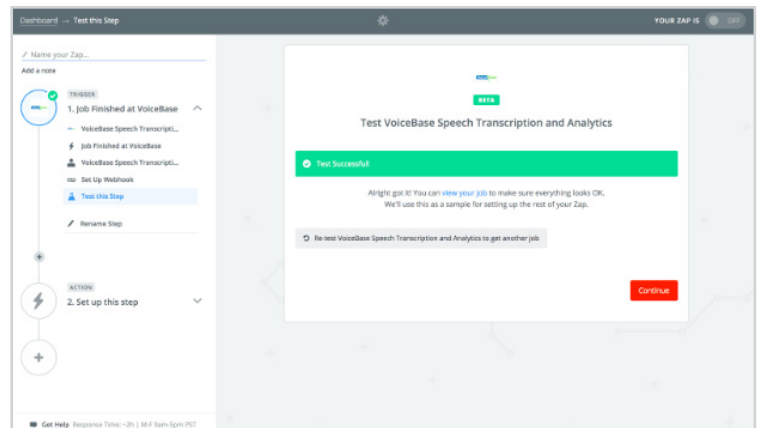


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and Zapier will verify it is receiving the VoiceBase callback. This is required if you setting any custom configuration to receive anything beyond transcription back from VoiceBase. If you are setting any custom metadata this is also required.

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.

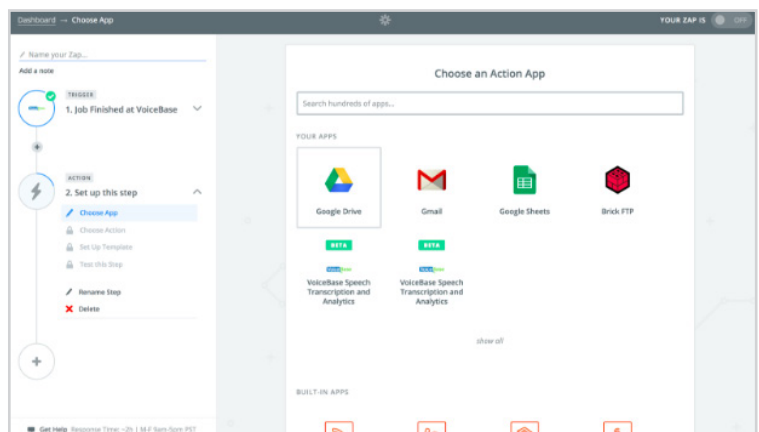
Note for VoiceBase internally - We are brainstorming the best way to expose this to end users. Maybe we will setup a simple web page with some tools that makes this part simpler...



## 9

### Select your action app

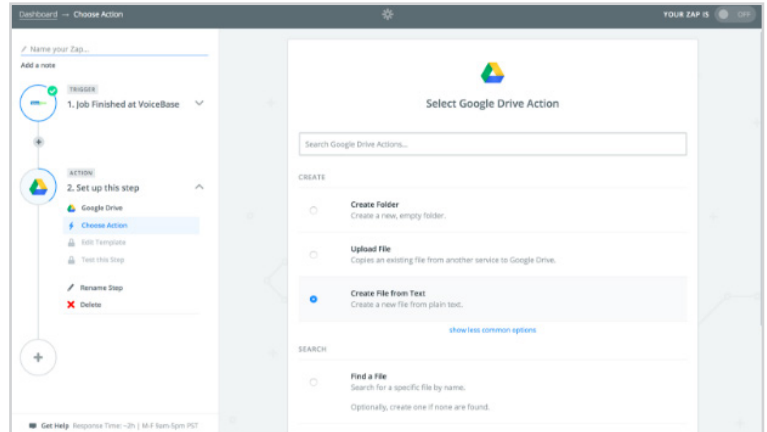
In this example we will use Google Drive



## 10

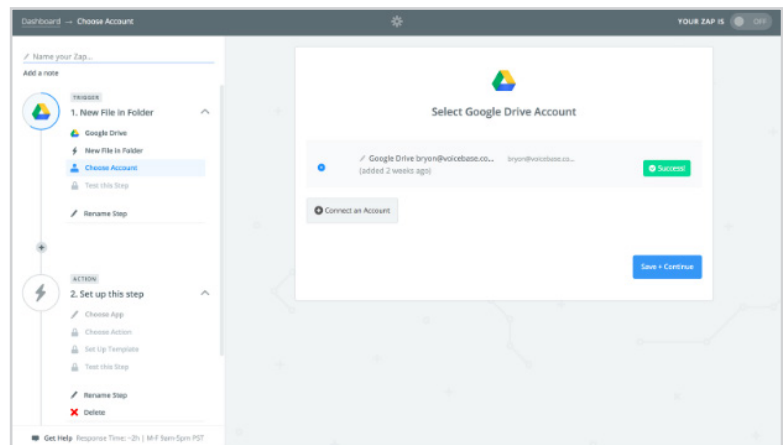
### Choose action

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,

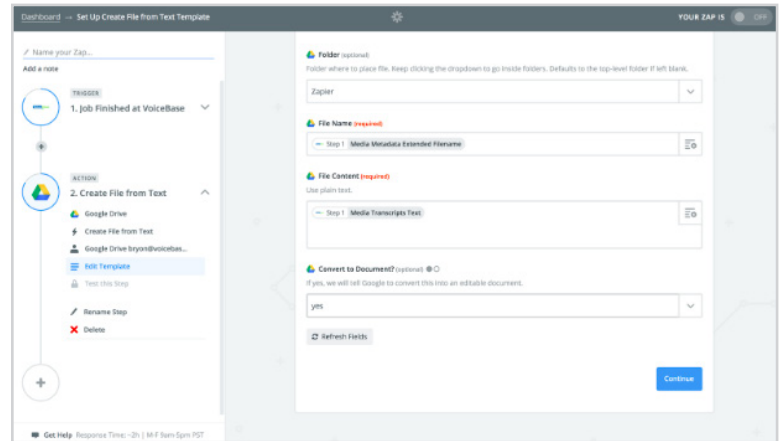
The most commonly used metadata values are

- 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,

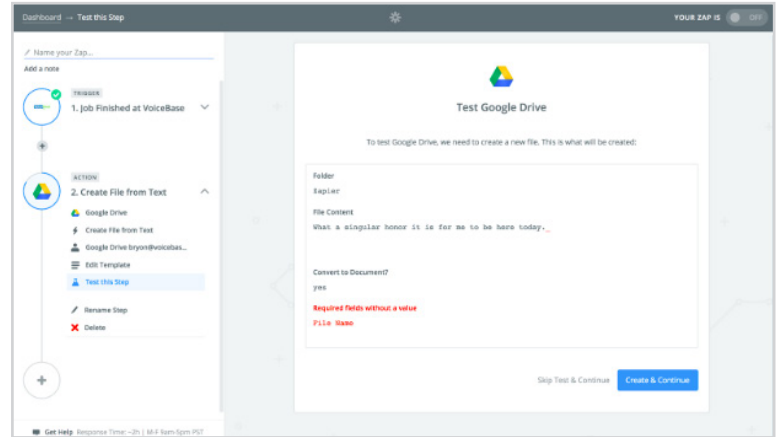
- Media Transcripts Text (transcription text)
- Media Transcripts SRT (transcript srt)
- Media Transcripts Webvtt (transcript webvtt)



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# 13

Click Skip Test and Continue



# 14

Name your Zap and turn it on!

