



# Creating your first flow using Claris Connect

## Introducing Claris Connect

Claris Connect™ is a cloud-based integration platform that allows you to create entire workflows by connecting applications.

Claris Connect is built on the concept of flows, used to automate everyday business tasks and processes.

## Useful terms to know

The following terms will be useful to understand as you become more familiar with Claris Connect.

Term	Description
<b>Flow</b>	A workflow that connects two or more apps or utilities within a project
<b>Project</b>	A set of related flows
<b>Connector</b>	Software that integrates workflows and shared data between apps or data sources
<b>Action</b>	A step that carries out a specific operation on a target application
<b>Trigger</b>	An event or action that initiates a flow
<b>Step</b>	Any operation in a flow - such as triggers, actions, if-then, stop, and on-error
<b>Step data</b>	Actual data returned from a previous step or preview data

## Creating your first flow in Claris Connect

This document provides a step-by-step tutorial for creating a simple flow between two applications - Mailchimp and Slack

In this example, you will create a flow that checks to see if a new subscriber has been added to a Mailchimp list and if so, a message will be generated and posted to Slack.



When a new subscriber is added to Mailchimp...



...a message is generated / displayed in Slack

## Before you begin

You will need accounts for both Mailchimp and Slack to follow along in this example. If you do not have accounts for these services, you can sign up for a free account for either service. In addition:

- Create a new audience in Mailchimp. An audience is a place for you to collect and manage your contacts in Mailchimp. In this example, the audience is named "Sample Audience."
- Create a new channel in Slack. A channel is a single place for a team to share messages, tools, and files. In our example, the Slack channel is named "Sample\_Slack\_Channel."

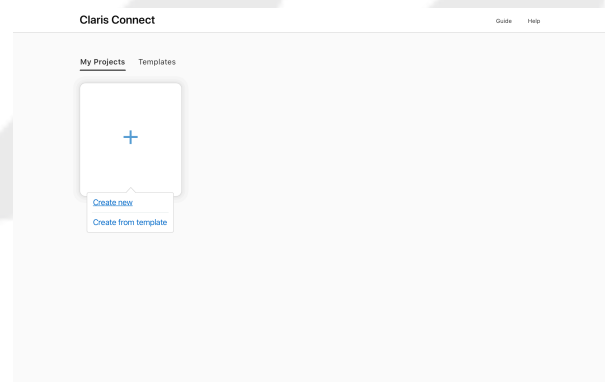
## Step by step directions

### STEP 1 - Create a new Project

Begin by creating a project.

A project is an organizing container for your flows. You work with projects on the Claris Connect homepage, where you create projects and use a project's options menu to create, rename, or delete a project.

On the Claris Connect homepage, click "+" and then click **Create New**. Enter a project name and click **Create**. In this example, we are using "My Example Project" as the project name.

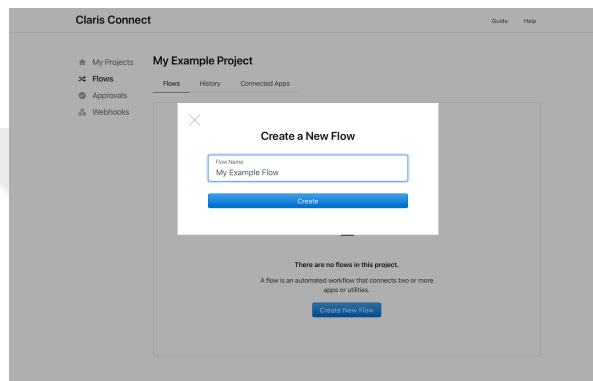


## STEP 2 - Create a new Flow

Add a flow to your new project.

Flows are automations that use two or more components. A component can be a Claris Connect utility or a connector to a third-party application ("app")

Click **Create New Flow** to begin creating a new flow in your project. Give your new flow a name and click **Save**. In this example, use "My Example Flow" as the name of the flow.

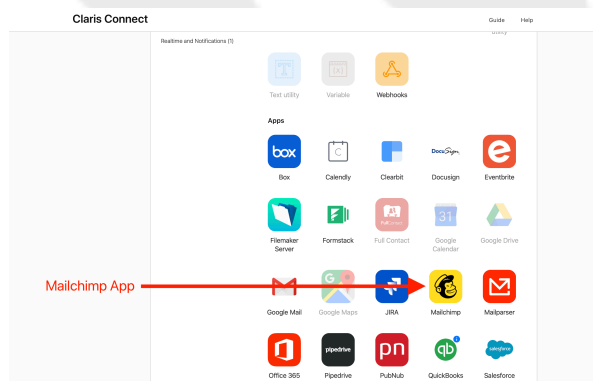


## STEP 3 - Select the app or utility to use as a trigger

Select the app or utility that you want to trigger the flow. All flows begin with a trigger. Note that some apps and utilities cannot act as a trigger (they are used only as actions)

A trigger is an event that initiates a flow. A trigger has two essential elements: the component (utility or app) in which the flow starts and the event in the component that initiates the flow. When a configured flow detects its trigger event, the flow runs.

For our example, scroll down to the Apps section and click the **Mailchimp** app.

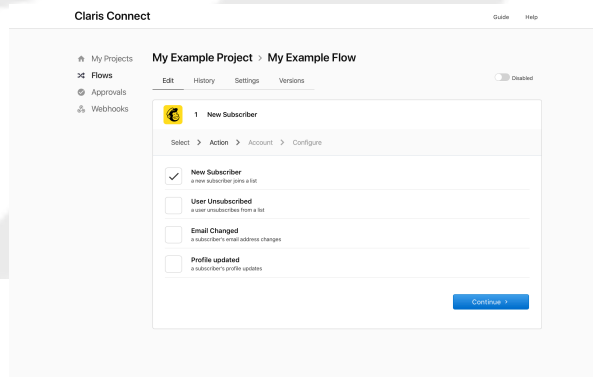


## STEP 4 - Select the action you want the trigger to "look" for

Triggers look for specific events. Each trigger will have different events that it can look for.

For our example, we want to take action when a new Mailchimp subscriber is detected.

For Mailchimp, select **New Subscriber** and then click **Continue**.

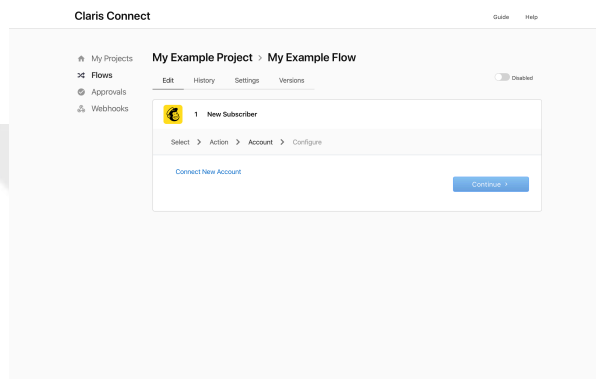


## STEP 5 - Connect to your Mailchimp account

NOTE: Mailchimp provides a freemium service that you can use in this example.

You must authorize Claris Connect to use the various apps it connects to. Depending on the app, you might also be able to create an account directly within Claris Connect.

Click **Connect New Account** link and log in with your Mailchimp credentials to continue.

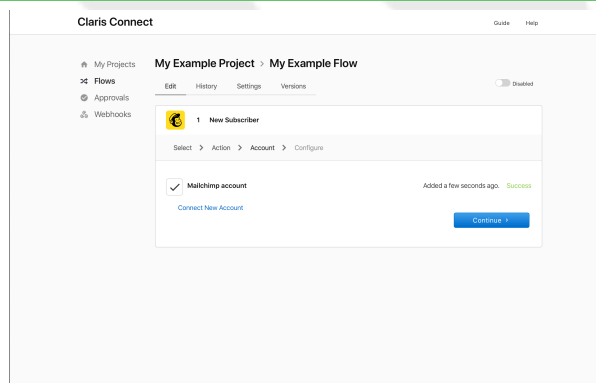


## STEP 6 - Verify that your Mailchimp account is selected

After confirming the account configuration, you should receive a "Success" message that you have successfully connected Claris Connect to Mailchimp.

Depending on the app you are connecting to, you might have to configure / select an account within that app or service.

Select **Mailchimp account** and click **Continue**.



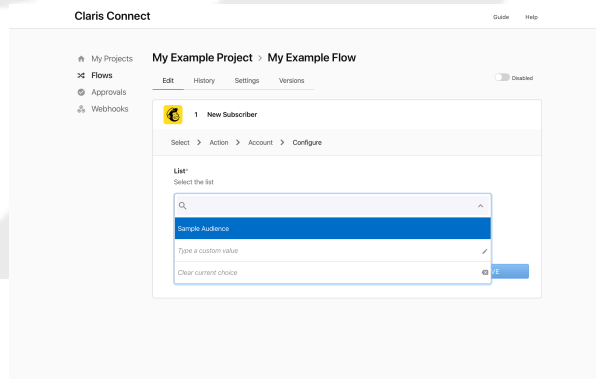
## STEP 7 - Select a Mailchimp mailing list to use

Claris Connect will need to know what Mailchimp audience to use / monitor.

In this example, we are going to use the audience named "Sample Audience."

NOTE: Configure audiences within the Mailchimp service.

Choose **"Sample Audience"** to continue and click **Save**.



## STEP 8 - Add (manually) a new Mailchimp subscriber

When you are prompted, perform the action in the trigger app. In our example, you will need to add manually, in Mailchimp, a new subscriber to "Sample Audience."

Performing this action in the trigger app not only tests the app connection to Claris Connect, but it also returns sample / "step" data for use in subsequent steps.

Manually add a new subscriber to "Sample Audience" in Mailchimp.

## STEP 9 - Confirm "test" subscriber was received

If Step 8 is successful, you should receive a "Connect Complete" (or equivalent) message.

If the connection is successful, click **Save**.

## STEP 10 - Add an action to your flow

This step configures the utility or app to use if a trigger is detected - otherwise known as "configuring the action."

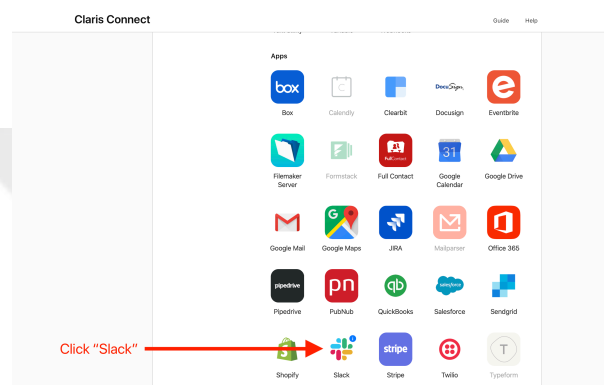
An action has the same four configuration steps as a trigger. In this case, we want to choose the action to perform when a new Mailchimp subscriber is detected.

Click **Action** to continue.

## STEP 11 - Select the app to perform an action in

Select the app or utility to use for the action step of the flow.

Select **Slack** to continue.

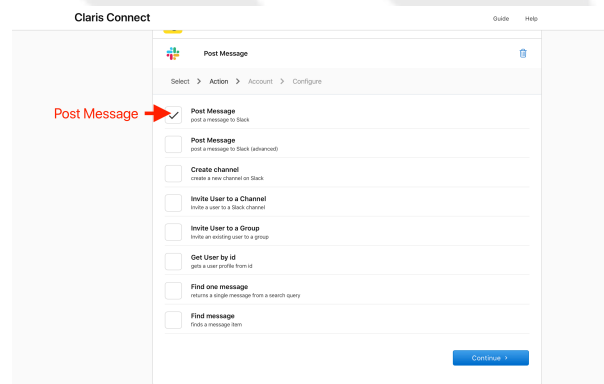


## STEP 12 - Select the action in the selected app / utility you want to perform

Select the flow action from those listed.

In our example, when a new subscriber is added to Mailchimp, we want to post a message to Slack.

Choose **Post Message** to continue.

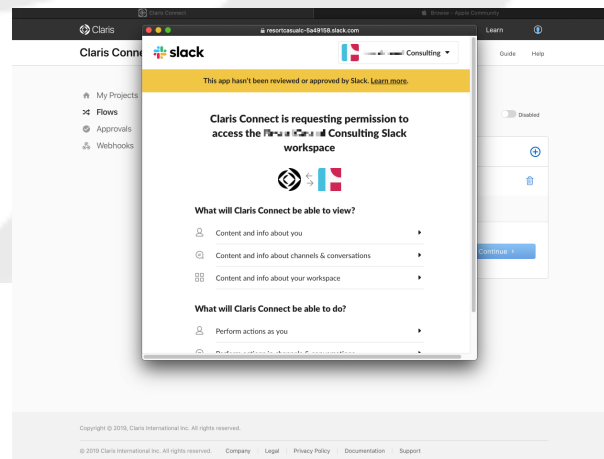


## STEP 13 - Connect to your Slack account

Much like what we did in Step 5, Claris Connect must authenticate with the selected app or utility before you can interact with it.

In our example, this means you need to log into your Slack account and provide Claris Connection permission to interact with it.

Click **Connect New Account** and log into your Slack account.

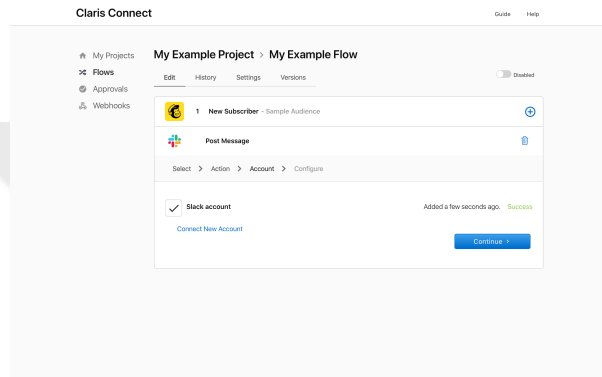


## STEP 14 - Confirm Slack account configuration

After confirming the account configuration, you should receive a "Success" message that you have successfully connected Claris Connect to Slack.

Depending on the app you are connecting to, you might have to configure / select an account within that app or service.

Select **Slack account** and click **Continue**.

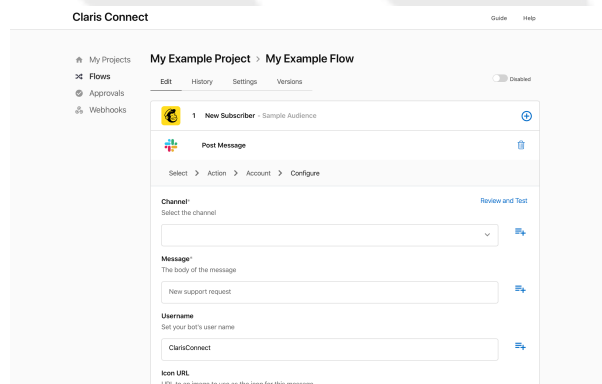


## STEP 15 - Configure Slack action

Each action will have different things to configure.

For Slack, configure **Channel** and **Message**.

See Steps 15a - 15d for more information.

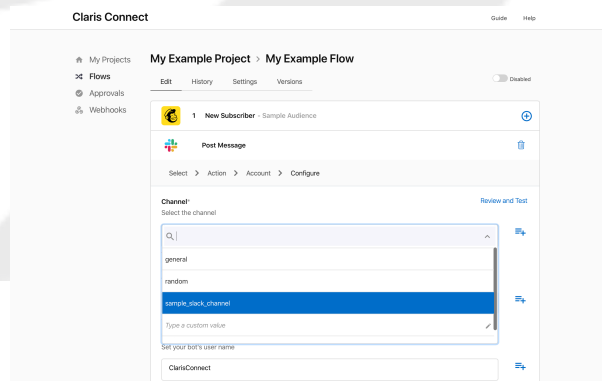


### STEP 15a - Configure Slack action (Channel)

Choose the appropriate Slack Channel from your Slack account.

Select **"sample\_slack\_channel"** from the list of available channels.

**NOTE:** If "sample\_slack\_channel" does not exist, you will need to create it in your Slack account before proceeding.

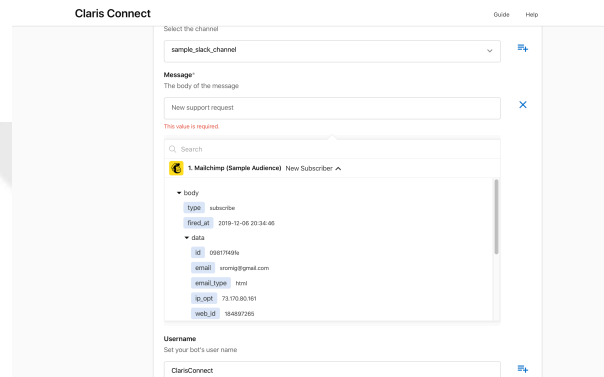


## STEP 15b - Configure Slack action (Message)

The "Message" is what you want posted to your Slack account when a new subscriber is detected.

With the Mailchimp account configured already, information from Mailchimp, such as the name of the new subscriber, can be used in the message posted to Slack.

Click the  button associated with **Message** and then **"1. Mailchimp (Sample Audience) New Subscriber"** to continue to Step 15c.



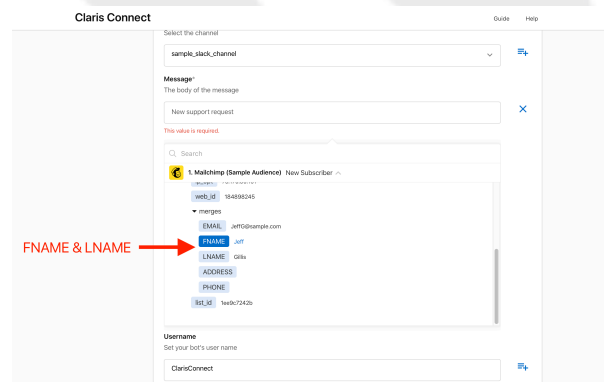
The screenshot shows the Claris Connect configuration page for a Slack action. The "Channel" is set to "sample\_slack\_channel". The "Message" field is currently empty, with a red error message "This value is required." below it. A search bar is visible, and a dropdown menu is open showing a selection from "1. Mailchimp (Sample Audience) New Subscriber". The dropdown shows fields like "body", "type", "first\_id", "data", "id", "email", "email\_type", "ip\_opt", and "web\_id". The "Username" field is set to "ClarisConnect".

## STEP 15c - Configure Slack action (Message)

You can see the sample data from Mailchimp to aid you in picking the fields and values for your message.

In our example, we are displaying the subscriber's first name (FNAME) and last name (LNAME) with space in between along with the static string of "has been added to Mailchimp." All of this is constructed in the Message field of Claris Connect as shown in the screenshot to the right.

Choose **FNAME** and **LNAME** and any additional customizations you want.



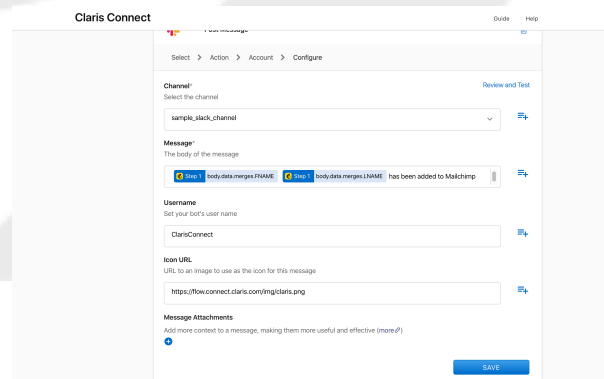
The screenshot shows the same Claris Connect configuration page, but now the "Message" field is populated with a JSON object. A red arrow points to the "FNAME" and "LNAME" fields in the JSON, with the text "FNAME & LNAME" next to it. The JSON object is: {"body": "New Subscriber", "type": "subscribe", "first\_id": "2019-10-05 20:24:45", "data": {"id": "09876543", "email": "srong@gmail.com", "email\_type": "html", "ip\_opt": "73.170.80.101", "web\_id": "184897265"}, "username": "ClarisConnect"}. The "Username" field is still "ClarisConnect".

## STEP 15d - Configure Slack action (Confirm Message and Save)

When you are done constructing your message, it should look something like this (see screenshot to the right).

You can come back and edit this step anytime you want - including editing and customizing the message posted to your Slack account.

Click **Save** to continue.



The screenshot shows the Claris Connect configuration page for a Slack action, now in the "Confirm Message and Save" step. The "Channel" is "sample\_slack\_channel". The "Message" field is populated with a JSON object: {"body": "body.data.merges.FNAME", "type": "subscribe", "first\_id": "2019-10-05 20:24:45", "data": {"id": "09876543", "email": "srong@gmail.com", "email\_type": "html", "ip\_opt": "73.170.80.101", "web\_id": "184897265"}, "username": "ClarisConnect"}. The "Username" field is "ClarisConnect". The "Icon URL" field is "https://flowconnect.claris.com/img/claris.png". The "Message Attachments" field is empty. A "SAVE" button is at the bottom right.

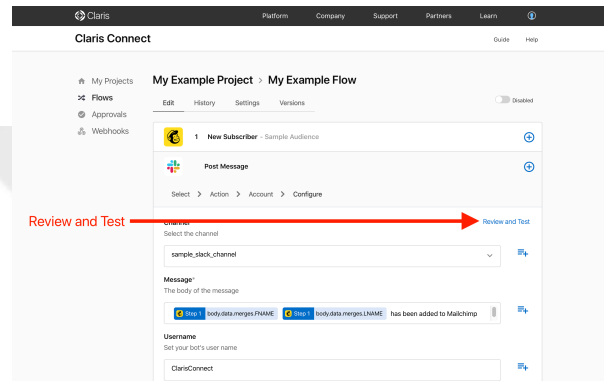


## STEP 16 - Review and Test

You can test entire flows or individual steps of a flow using Claris Connect.

As you configure a flow step, you can test it by selecting the step to test and clicking **Review and Test**.

To see how your message will look in Slack, click **Post Message** to view the configuration of your Slack step (if it is not already open and visible) and click **Review and Test**.



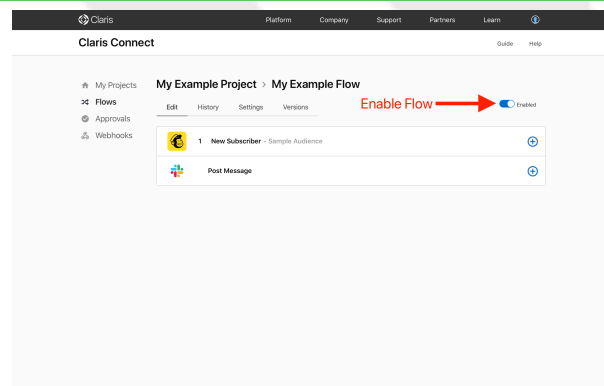
## STEP 17 - Enable your flow

Your completed flow should look like this (see screenshot at right.)

A flow is disabled by default while you are creating it.

When you enable a flow, the flow runs whenever the trigger occurs. Consider, for example, disabling a flow if you do not want it to run while troubleshooting it.

Use the Enable / Disable slider to enable your flow and add a new subscriber in Mailchimp to see a message posted to Slack.



## Next steps in working with Claris Connect

Now that you have created your first flow in Claris Connect, you are ready to create your own triggers, flows, and actions as well as learn about webhooks, variables, and other types of action steps like If-then, stop, and on-error. When you are planning your next Claris Connect project, flow these general steps:

1. Determine the workflow you want to automate, including the apps to connect and the steps you want to be performed. Write down a task statement, such as: "When a new subscriber is added to Mailchimp, a message should be generated and displayed in Slack"
2. Plan the project and flow based on the task statement. For example:
  - Decide to create a Mailchimp mailing list because the flow starts with Mailchimp

- Identify the trigger and action (or actions) in the flow. In this example, adding a new subscriber to Mailchimp is the trigger, and generating or displaying a message in Slack in the action
3. Identify any prerequisite tasks for the flow. These are steps external to Claris Connect. For example:
    - You need user accounts for each app that you want to connect. In this case, Mailchimp and Slack accounts
    - In Mailchimp, you must create a subscriber list
    - In Slack, you must create a channel
  4. Create the project
  5. Create and enable the flow
  6. Test the flow

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