Zoho forms connector for Ideolve using Zapier

Table of Contents

Preparation

Get Started with the Zapier connector

Preparation

• First, you have to create a free Ideolve account by going through the following link: https://ideolve.mithi.com/ (https://ideolve.mithi.com/).

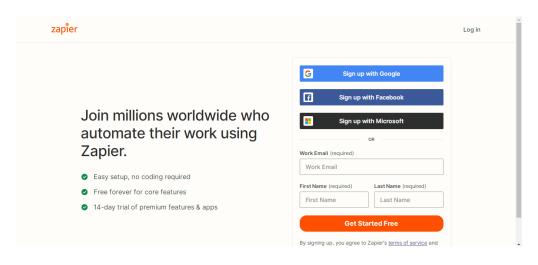
	ideolve	
	Sign Up	
	Your Full Name * You can't leave this empty.	_ o
	Email *	- 0
	Create a password *	_ 0
	Confirm your password *	•
	REGISTER	
AST	know more about ideolve	

• Then, create a Zoho account. Once created, make a Zoho Form of your choice.

Name		
1		
First Name	Last Name	
Email		
Address		
Address		
Address Street Address		
Street Address		
Street Address	State/Region/Province	
Street Address Address Line 2	State/Region/Province	Activate Windows

Get Started with the Zapier connector

• Sign up on Zapier by following this like: https://zapier.com/sign-up (https://zapier.com/sign-up).



• Click the "+Create Zap" button on the left side of the Zapier site after logging in.

× zapier	۵ (۵
+ Create Zap	🔆 Welcome to Zapier!
Dashboard	
4 Zaps	Create your own workflow Know exactly what you want to build? Select the apps you want to connect to start your custom setup.
Free Plan	Connect this app with this one!
Zaps Unlimited	

• For the App under "Trigger," select Zoho Forms

← Untitled Zap ∅ Draft - loaded	_zapier		Fix to Publish
	1. Trigger A trigger is an event that starts your Zap	Learn more	 ∷≡
	Appevent	Built-in tools	0
	Start the Zap when something happens in an app O Zoho foj Zoho Forms	Try one of our built-in triggers RSS Start the Zap when an RSS feed updates	\@
		Start the Zap every hour, day, week, or month	
ver. 2775f7ab		Go to Settings to a	activate Windows.

• Under the Event, choose "New form entry" and click on Continue.

← Untitled Zap ∅ Draft - saved	_zapier		Fix to Publish
	Błass ••• Trigger		Â
	Forms 1. New Form Entry in Zoho Forms		:=
	∧ Choose app & event		0
	Perez Zoho Forms Change		0
	Event (required)		
	New Form Entry		Ð
	This is what starts the Zap.		
	Continue		
ver. 2775f7ab	Choose account	Activate Window Go to Settings to activ	

• Next, link the Zoho Account in which you've created the Zoho Form and click on Continue

← Untitled Zap ∅ Draft - saved	_zapier		Fix to Publish
	Porms I. New Form Entry in Zoho Forms		
	✓ Choose app & event		=
			?
	Zoho Forms account: (required)		0
	Zoho Forms @gmail.com #2		@
	Zoho Forms is a secure partner with Zapier. <u>Your credentials are encrypted & can be removed at any time</u> . You can <u>manage all</u> of your connected accounts here.		Fi
	Continue		
	✓ Set up trigger	Activate Windows	
ver. 2775f7ab	÷	Go to Settings to activat	

• Under the "Set up Trigger Section", you need to now choose the Zoho form that you have created.

← Untitled Zap ∅ Draft - saved	_zapier	Fix to Publish
	✓ Choose app & event	Â
	Choose account	:=
	^ Set up trigger	0
	Form (required)	0
	Contact Information 1 🗘	Ø
	Refresh fields Continue	Đ
	v Test trigger	
		ctivate Windows o to Settings to activate Windows.
ver. 2775f7ab	2 Action	~

• Remember to have at least one response in your Zoho form since now we have to test the trigger to see if it captures all the information. Click on Continue.

← Untitled Zap ∅ Draft - saved	_zapier		Fix to Publish
	∧ Test trigger	•	Â
	✓ We found a form entry!		:=
	This form entry was found in your Zoho Forms account. Learn more about test data.	_	0
	Press Form entry A	:	Ø
	,O Search		\$
	Name_First: Kuntal Name_Last: Ayir Email: @@gmail.com	<u>^</u>	Ø
	Address_AddressLine1:		
	Address_City: Address_Region: Maharashtra		
	Address_ZipCode: Address_Country: India PhoneNumber:	Activate Windo Go to Settings to ac	
ver. 2775f7ab	PhoneNumber:		-

• After testing the trigger, now we have to set up the Action. Under the Action tab, Choose the Ideolve app.

← Untitled Zap ∅ Draft - saved	_zapier		Fix to Publish
	••• Action ••• 2. Ideolve •••	•	:≡
	Choose app & event		0
	Change		0
	Event (required)		Ø
	O Choose an event		Ð
	This is performed when the Zap runs.		
	To continue, choose an event	Activate Window	re
ver. 2775f7ab	÷	Go to Settings to activ	

• The new event to add every time an entry is made is to add a new note. Choose "Add Note" under Event and continue.

← Untitled Zap Draft - saved	/ _zapier	Fix to Publish
	•••• Action ••••	
	2. Add Note in Ideolve	≔
	^ Choose app & event	0
	Change	Ø
	Event (required)	Ø
	Add Note C	Ð
	Tricreate of when the Zapruns	
	Add Note Adds a new note to the user Continue	
ver. 2775f7ab	Choose account Activate Windows G to Settings to activate	

• Choose your Ideolve account to save the note and Continue.

C Untitled Zap	_zapier		Fix to Publish
	Contraction		
	- 2. Add Note in Ideolve		≔
	✓ Choose app & event)	0
			0
	Ideolve account: (required)		@
	Ideolve @mithi.com		197
	Ideolve is a secure partner with Zapier. <u>Your credentials are encrypted & can be removed at any time</u> . You can <u>manage all of</u> your connected accounts here.		Đ
	Continue		
	Set up action	Activate Window Gp to Settings to active	/S ate Windows,
ver. 2775f7ab	÷	, a compete dear	-

• Setup the action i.e. How you want your note to look. You can include the data you have captured from the Google form and put it in the Note text. Remember that the Note text is in HTML format so you need to use some HTML tags to format the text.

← Untitled Zap ∅ Draft - saved	_zapier	Fix to Publish
	∽ Set up action	Â
	Note Text (HTML) (required)	:=
	Name: Image: The stress in the stres in the stress in the stress in the stress in the s	0
	Phone number: [#1.Phone: cbr> Address: [#1.Address - Street Address:, [#1.Address - Address Line 2:,	0
	Image: The second se	<u>چ</u>
	Comments: E 1. Comments: Hellol HTML text to be added to the note.	Ð
	Subject (required)	
	Image: The second se	
	Note Origin	Activate Windows Go to Settings to activate Windows.
ver. 2775f7ab	I. Submitted (Pretty): 03-Aug-2022 15:57:38	· · · · · · · · · · · · · · · · · · ·

• Once you're done formatting the note, decide what workspace you want to put the note in. Set its permission and the people you want to share the note with and press Continue.

← Untitled Zap ∅ Draft - saved	_zapier	Fix to Publish
	False	Â
	Makes the note uneditable if selected True.	
	Workspace (required)	
	Kuntal	0
	Select the workspace for the note.	0
	Share note with	0
	Choose value	
	Users to share the note with.	Ð
	Set share permissions to users selected	
	Choose value	
	Set share permissions to the users	
ver. 2775f7ab	Refresh fields Continue	Activate Windows Go to Settings to activate Windows.

- Now, test the note and see how it appears in Ideolve. It usually takes a few seconds for the note to appear on Ideolve.
- Open Ideolve and you will receive a new note with the information entered in the Zoho Form. Publish the Zap and every time the form is filled, a new note with the information will be created.

KA Ĉ	Home +NOTE Search: keywords, #tag or @user ③ Q	Kuntal Ayir's Data Created by Kuntal Ayir Kuntal Aug 03 2022 4:09 PM + Add tag	SHARE :
\$	All Notes *	Note Comments Files Links Tagged Comments	Q ≔ Ø
@ ¹	Kuntal Ayir 4.09 PM	Name: Kuntal Ayir Email:@gmail.com	6 Ø B
♥	Kuntal Ayir's Data Name: Kuntal Ayir Email:	Phone number Address: Maharashtra, India. Comments: Heliol	