

Google Spreadsheet filled using Forms integration using Zapier

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Preparation

Step 1: Sign up on Ideolve

Sign up for a free Ideolve account (<https://ideolve.mithi.com/>)

A screenshot of the Ideolve website's sign-up page. The page has a dark blue background with a white sign-up form in the center. The form contains four input fields: 'Your Full Name *' with a red error message 'You can't leave this empty.', 'Email *', 'Create a password *', and 'Confirm your password *'. Each field has a small circular icon to its right. Below the fields is a 'REGISTER' button. At the bottom of the form, there is a link that says 'know more about ideolve'.

Create a workspace (<https://docs.mithi.com/home/how-to-create-and-manage-workspaces-in-ideolve>) where the notes for each form filled will be created.

Invite teammates (<https://docs.mithi.com/home/how-to-create-and-manage-workspaces-in-ideolve#send-an-invitation%C2%A0to-join-workspaces>) who will need access to the notes.

Step 2: Create the form to collect the Input

You can use any of the forms [listed here](https://zapier.com/apps/categories/forms) (<https://zapier.com/apps/categories/forms>).

For example, if you select Google Forms, you can [refer to the guide here](https://support.google.com/a/users/answer/9303071?hl=en). (<https://support.google.com/a/users/answer/9303071?hl=en>)

On creating the form, go to "Responses" table and click on the green "Create Spreadsheet" icon and create a new spreadsheet. We will need to link this spreadsheet as a Zap trigger later on.

Get Started with the integration

Step 1: Sign up on Zapier

- Sign up on Zapier by following the link here (<https://zapier.com/sign-up>).

zapier Log in

Join millions worldwide who automate their work using Zapier.

- ✓ Easy setup, no coding required
- ✓ Free forever for core features
- ✓ 14-day trial of premium features & apps

Sign up with Google
Sign up with Facebook
Sign up with Microsoft

OR

Work Email (required)
Work Email

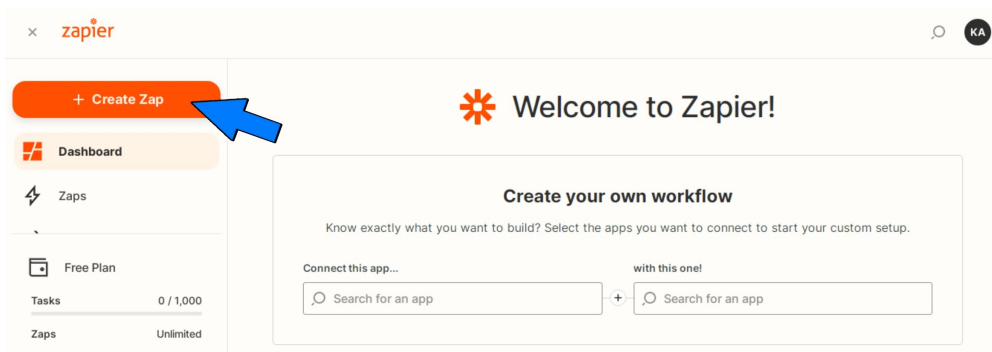
First Name (required) Last Name (required)
First Name Last Name

Get Started Free

By signing up, you agree to Zapier's [terms of service](#) and

Step 2: Create the Zap to upload form data into Ideolve Notes

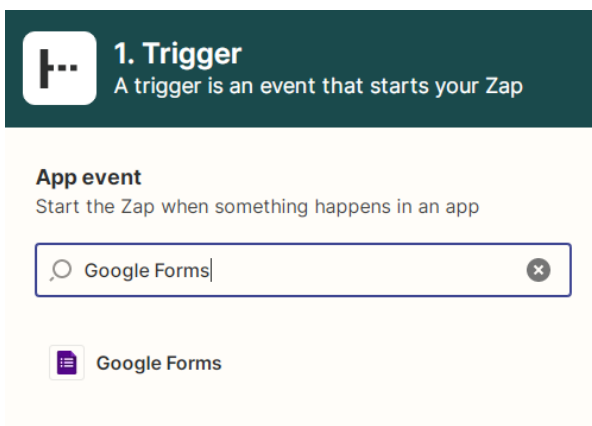
- Click the "+Create Zap" button on the left side of the Zapier site after logging in.



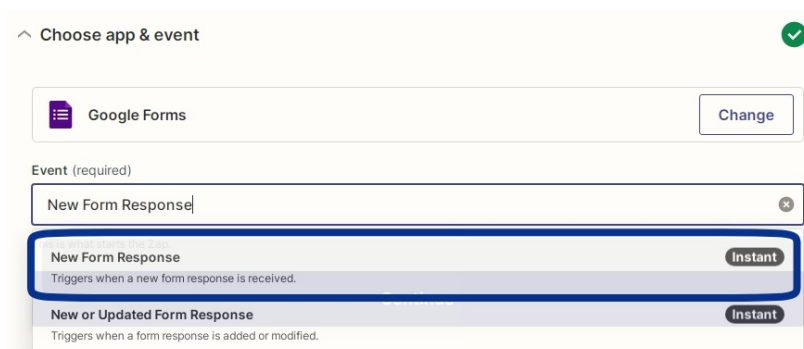
Step 3: Define the Zap Trigger

NOTE: The example here is specific to Google Forms. For other form triggers refer to the relevant documentation

- You must now choose a Trigger. Select "Google Forms" from the list of apps below.




- Set the Event to be a "New Form Response" for the response. This implies that an event is triggered each time a new response is added to your form.



- Next, choose the account on which you have created the Google Form.

^ Choose account ✓

Google Forms (Legacy) account: (required)

 Google Forms ayirkunta@gmail.com

Google Forms (Legacy) is a secure partner with Zapier. [Your credentials are encrypted & can be removed at any time.](#) You can [manage all of your connected accounts here.](#)

Continue

- Choose the Spreadsheet that you've created under the Spreadsheet tab. Once that is done, the Worksheet tab will auto-detect and create a "Form Responses" tab for the Spreadsheet, select it.

^ Set up trigger ✓

Spreadsheet (required)

Contact Information 1 (Responses)

Worksheet (required)

Form Responses 1

You *must* have column headers and at least one entry in your spreadsheet to view the available fields below. [See here f... more](#)

Refresh fields **Continue**

- Fill in a sample value into your Google Form to check if the response gets properly caught by Zapier.

^ Test trigger ✓

✓ **We found a response!**
This response was found in your Google Forms (Legacy) account. [Learn more about test data.](#)

☰ Response B ↕


🔍 Search

id: 3
row: 3
COLSA: 6/28/2022 12:20:10
COLSB: Neha Chawan
COLSC: nehachawan99@gmail.com
COLSD: Thane
COLSE: 9754678032
COLSF: Hello

Step 6: Define the Zap Action

- Now it's time to choose the App and Event. Choose "Ideolve" from the list, then click "Add Note" for Ideolve. Next, choose the Ideolve account made before and link it to the Zap.

^ Choose app & event ✓

 Ideolve Beta Change

Event (required)


Add Note ↕

This is performed when the Zap runs.

Continue

^ Choose account ✓

Ideolve account: (required)

 Ideolve kuntal.ayir@mithi.com ↕

Ideolve is a secure partner with Zapier. [Your credentials are encrypted & can be removed at any time.](#) You can [manage all of your connected accounts here.](#)

Continue

- Now you have to format the way your note content will look, and you have to do so with the help of HTML.

For example, if you want to display the Name entered in the Google form, enter the text "Name:" and the column imported from the spreadsheet.

^ Set up action ✓

Note Text (HTML) (required)

Name:

Email:

Address:

Phone number:

Comments:

Timestamp:

HTML text to be added to the note.

Subject (required)

's Answers

Title to the note you are creating.

Note Origin

Origin of the note data. Tip: Use the name of the app used for the zap. Example: google-form, google-sheets, freshdes... [more](#)

- As for the title/subject of the note, you can also import one of the entered data like the name, to easily access the candidate's note using the search feature on Ideolve.
- You can also set the newly created note in Ideolve to be read-only or editable. In the end, you have to choose the workspace to save the notes and the final sharing permissions.

Read Only?

True

Makes the note uneditable if selected True.

Workspace (required)

Kuntal

Select the workspace for the note.

Share note with

Choose value...

Users to share the note with.



Set share permissions to users selected

Choose value...

Set share permissions to the users

- Test the Zap working and the note showing up on the Ideolve. You can always go back into the previous choices and adjust them if you're not satisfied.

Test action ✓

 →  **Send Note to Ideolve**
We'll use this as a sample for setting up the rest of your Zap.

i A Note was sent to Ideolve about 1 second ago

Search item data...

status: SUCCESS

note:

- noteuuid:** 55cce1ae-ccb9-4bea-bf74-a3a6463b89ba
- subject:** Neha Chawan's Answers
- emailid:** kuntal.ayir@mithi.com
- owner:** 0a712ccf-b6aa-4ad9-90bb-8fb3ac2ee54d
- creationdate:** Jun 28 2022 | 12:25 PM
- modificationdate:** Jun 28 2022 | 12:25 PM
- displayableModificationD... :** 12:25 PM
- dislavableCreationDate:** 12:25 PM
















- The Ideolve note will look something like this:

< Neha Chawan's Answers SHARE ⋮

Created by Kuntal Ayir | Kuntal | Jun 28 2022 | 12:25 PM

[+ Add tag](#)

Note Comments Files Links Tagged Comments 🔍 ☰ 🔊

B *i* U **AA**  **A:**              

Name: Neha Chawan
Email: nehachawan99@gmail.com
Address: Thane
Phone number: 9754678032
Comments: Hello
Timestamp: 6/28/2022 12:20:10