

# Jotforms and Ideolve integration with Zapier

## Preparation

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

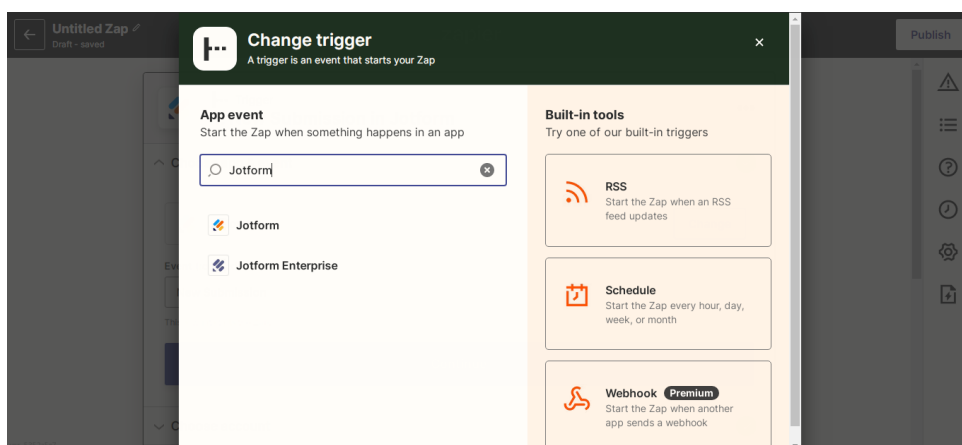
- Then, create a Jotform account and create a Jotform of your choice.

## Get Started with the Zapier Connector

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

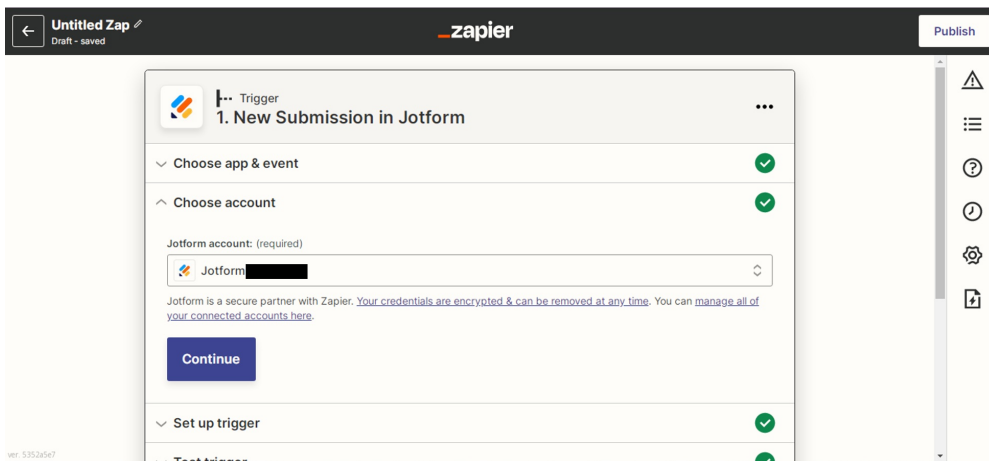
- Click the "+Create Zap" button on the left side of the Zapier site after logging in.
- 

- For the App under "Trigger," select Jotform

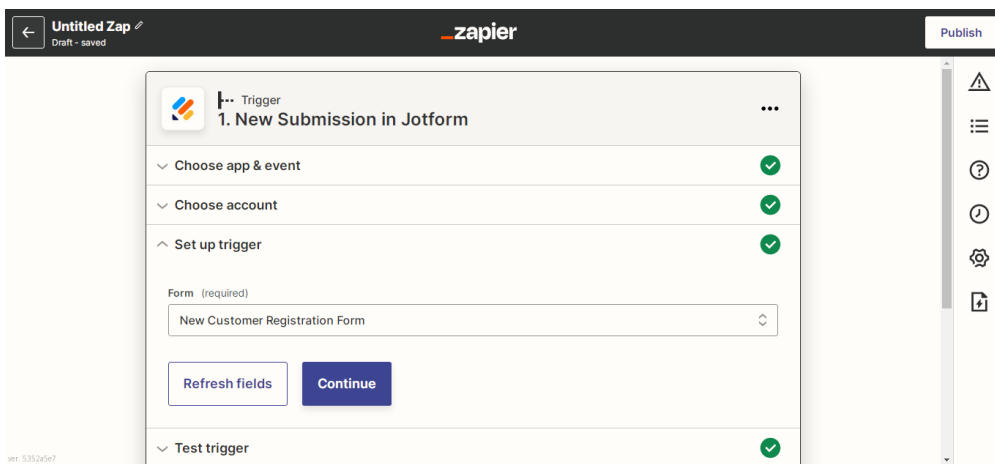


- Under the Event, choose "New Submission" and click on Continue.
- 

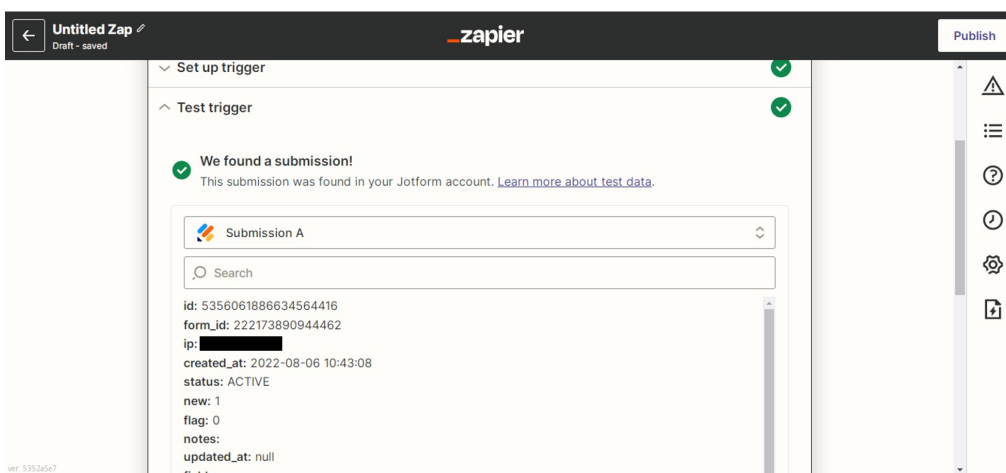
- Next, link the Jotform Account in which you've created the Jotform form and click on Continue



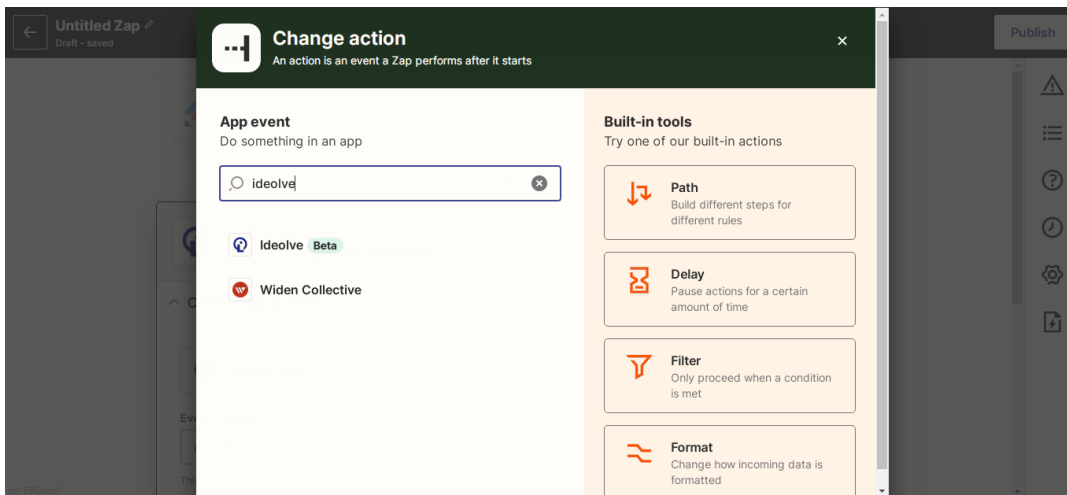
- Under the "Set up Trigger Section", you need to now choose the Jotform form that you have created.



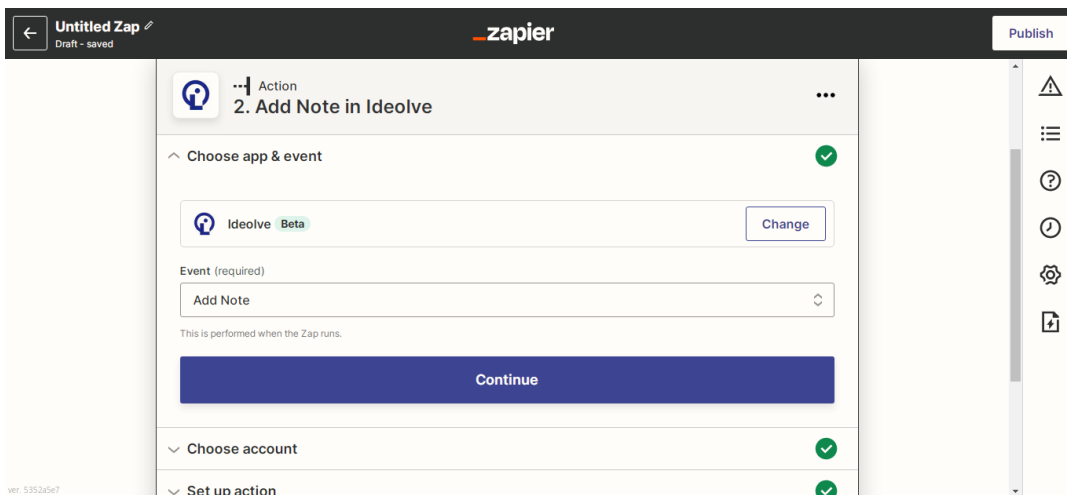
- Remember to have at least one response in your Jotform form since now we have to test the trigger to see if it captures all the information. Click on Continue.



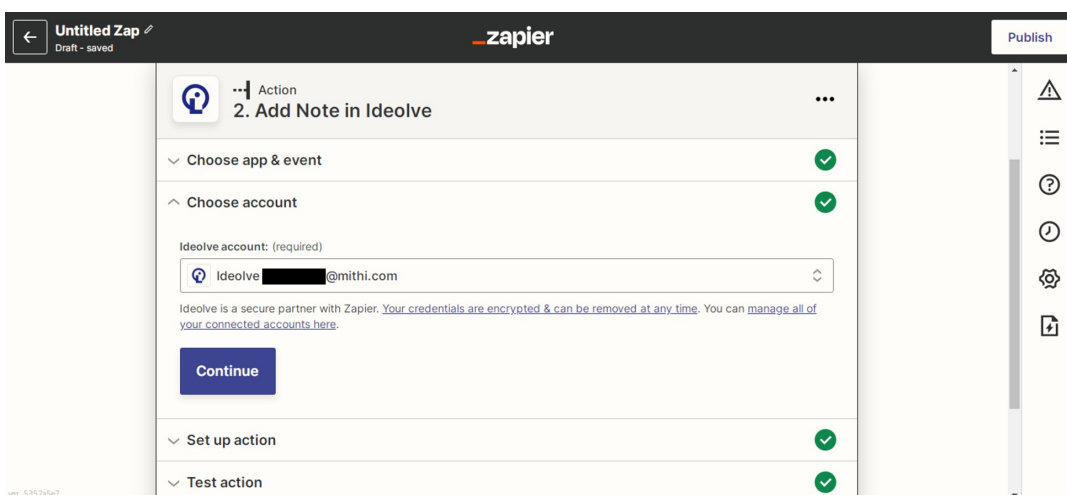
- After testing the trigger, now we have to set up the Action. Under the Action tab, Choose the Ideolve app.



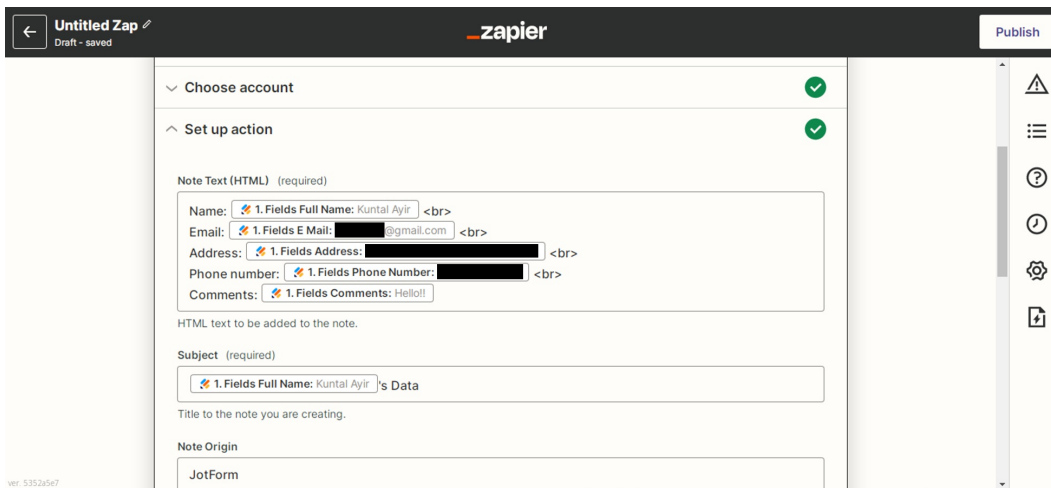
- The new event to add every time an entry is made is to add a new note. Choose "Add Note" under Event and continue.



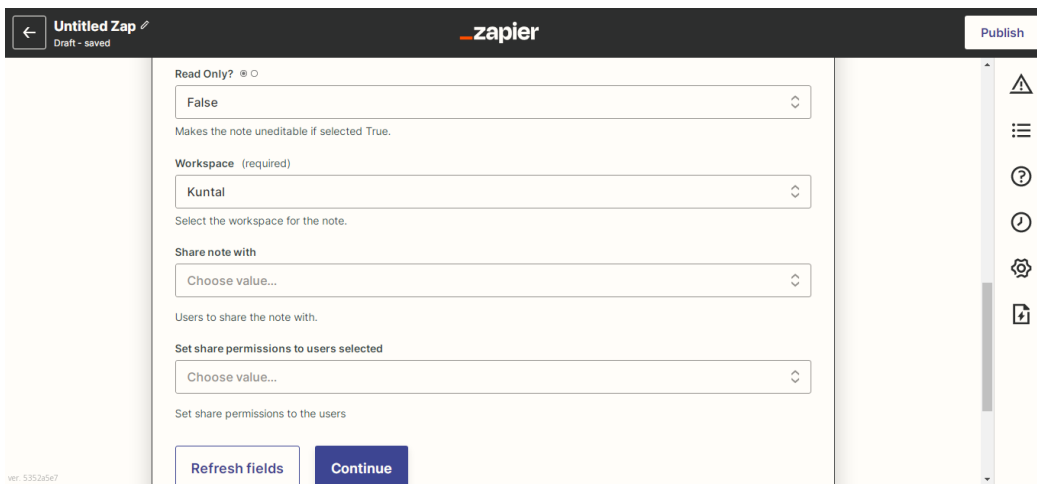
- Choose your Ideolve account to save the note and Continue.



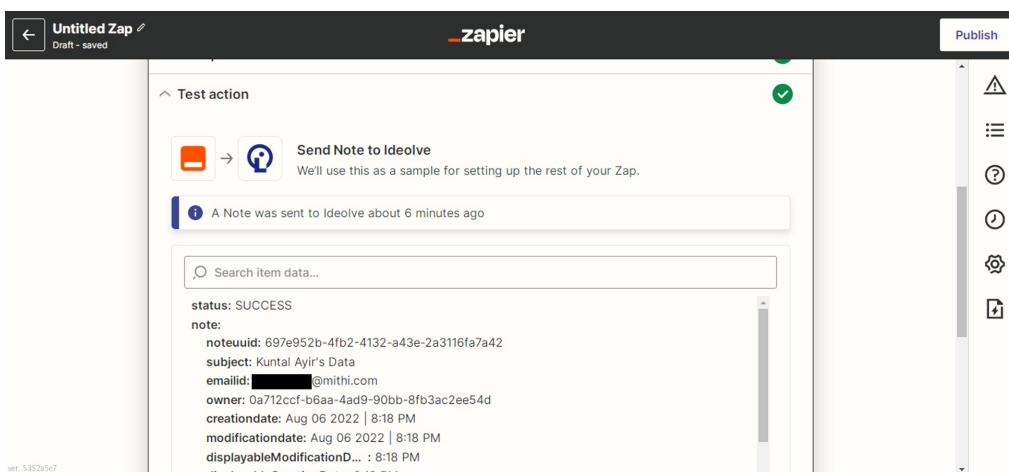
- Setup the action i.e. How you want your note to look. You can include the data you have captured from the Google form and put it in the Note text. Remember that the Note text is in HTML format so you need to use some HTML tags to format the text.



- 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.



- Now, test the note and see how it appears in Ideolve. It usually takes 3 seconds for the note to appear on Ideolve.



- Open Ideolve and you will receive a new note with the information entered in the Jotform form. Publish the Zap and every time a new row is added, a new note with the information will be created.

KA Home +NOTE

Search: keywords, #tag or @user

All Notes

Kuntal Ayir | 8:18 PM

Kuntal Ayir's Data

Name: Kuntal Ayir Email: [REDACTED]@gmail.com Address: [REDACTED] Phone number: [REDACTED] Comments: Hello!

Created by Kuntal Ayir | Kuntal | Aug 06 2022 | 8:18 PM

+ Add tag

Note Comments Files Links Tagged Comments

SHARE