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 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.
- For the App under "Trigger," select Jotform

← Untitled Zap ∅ Draft - saved	Change trigger A trigger is an event that starts your Zap		×	Publish
	pp event	Built-in tools		<u>^</u>
	art the Zap when something happens in an app	Try one of our built-in triggers		
	3 Jotform	Start the Zap when an RSS feed updates	5	
	🖇 Jotform Enterprise			
Thi		Start the Zap every hour, o week, or month	lay,	Ð
← C		Start the Zap when anothe app sends a webhook	r	

- 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

← Untitled Zap ∅ Draft - saved	_zapier	Publish
	🕐 🕶 Trigger	Â
	I. New Submission in Jotform	:=
	✓ Choose app & event	?
	^ Choose account	0
	Jotform account: (required)	ø
	Jotform S a secure partner with Zapier. Your credentials are encrypted & can be removed at any time. You can manage all of your connected accounts here.	Ð
	Continue	
	Set up trigger	
ver. 5352a5e7		-

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

← Untitled Zap Ø Draft - saved	_zapier		Publish
	 I. New Submission in Jotform 	•••	 ≣
	Choose app & event	0	0
	✓ Choose account	•	Ø
		\bigcirc	ø
	Form (required) New Customer Registration Form	\$	Đ
ver. 5352a5e7	Refresh fields Continue ✓ Test trigger	•	

• 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.

← Untitled Zap ∅ Draft - saved	_zapier		Publish
	✓ Set up trigger	Ø	Â
		\bigcirc	<u>7:7</u>
			≔
	We found a submission!		
	This submission was found in your Jotform account. Learn more about test data.		?
		^	0
	🞸 Submission A	Ŷ	
	O Search		Ø
	id: 5356061886634564416	*	Fi
	form_id: 222173890944462		
	ip:		
	created_at: 2022-08-06 10:43:08		
	status: ACTIVE		
	new: 1		
	flag: 0		
	notes: updated_at: null		
ver. 5352a5e7	fielde:		-

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

← Untitled Zap Untitled Zap Draft - saved	Change action An action is an event a Zap performs after it starts	×	Publish
			Â
2	App event Do something in an app	Built-in tools Try one of our built-in actions	:=
	,O ideolve 🛛	Path	?
G	Ideolve Beta	Build different steps for different rules	0
	😡 Widen Collective	Delay Pause actions for a certain	@
~ C		amount of time	Ð
		Only proceed when a condition is met	
Ver, 535245e7		Change how incoming data is formatted	

• 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		Publish
	••••• Action 2. Add Note in Ideolve		Â
	_		≔
			?
	Change		Ø
	Event (required)		Ø
	Add Note		Đ
	Continue		
	✓ Choose account	-	
ver. 5352a5e7	✓ Set up action		-

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

← Untitled Zap ∅ Draft - saved	_zapier			Publis	h
	2. Add Note in Ideolve			Ĺ	<u>^</u>
	Choose app & event		-		≡
	 Choose account 	0	-	0	?
	Ideolve account: (required)			(Ð
		0		4	ই
	Ideolve is a secure partner with Zapier. <u>Your credentials are encrypted & can be removed at any time</u> . You can <u>manage all c</u> your connected accounts here.	of			7
	Continue			L	
	\sim Set up action	•			
ver. 5352a5e7	\sim Test action	0		Ţ	

• 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	Publish
	Choose account	Â
		:=
	Note Text (HTML) (required)	0
	Name:	0
	Address: 🖋 1. Fields Address: Phone number: www.communications.com Comments: www.communications.com 	@
	HTML text to be added to the note.	Đ
	Subject (required) Image: Subject (required) Image: Subject (required) Subject (required)	
	Title to the note you are creating.	
	Note Origin	
ver. 5352a5e7	JotForm	

• 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	Publish
	Read Only? ® O	Â
	False 🗘	<u></u>
	Makes the note uneditable if selected True.	:=
	Workspace (required)	?
	Kuntal	Û
	Select the workspace for the note.	\odot
	Share note with	~
	Choose value	Ø
	Users to share the note with.	Ø
	Set share permissions to users selected	
	Choose value	
	Set share permissions to the users	
ver. 5352a5e7	Refresh fields Continue	-

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

← Untitled Zap ∅ Draft - saved	_zapier	Publish
		Â
	Send Note to Ideolye	
	Send Note to Ideoive We'll use this as a sample for setting up the rest of your Zap.	0
	A Note was sent to Ideolve about 6 minutes ago	0
	Ø Search item data	
	status: SUCCESS note:	Ð
	noteuuid: 697e9520-4fb2-4132-a43e-2a3116fa7a42 subject: Kuntal Ayir's Data emailid: @@mithi.com	
	owner: 0a712ccf-b6aa-4ad9-90bb-8fb3ac2ee54d creationdate: Aug 06 2022 8:18 PM	
ver. 5352a5e7	modificationdate: Aug 06 2022 8:18 PM displayableModificationD 8:18 PM displayableModificationD 8:18 PM	*

• 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.

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©' ∾ ⊡	Kuntal Ayir 8:18 PM Kuntal Ayir's Data Name: Kuntal Ayir Email:		Name: Kuntal Ayir Email: @@gmail.com Address: Phone number: Comments: HelloII	<i>₽ @</i> B