



WHAT IS ZAPIER?

Zapier is a third-party application that provides the technology to easily integrate data between web apps or applications with web based integration points. Zapier calls this configuration a “Zap”. Every individual form, application or endpoint requires a unique “Zap” to be configured. “Zaps” consist of Triggers and Actions. When a “Trigger” initiates the event, Zapier will automatically post the data into Captorra with an “Action”.

How to use Zapier

Using Zapier you are able to post Form Submissions from such apps as; Formstack, Facebook Pages, Gravity Forms and Unbounce; to Captorra.

Below is a step-by-step guide for integrating an app with Captorra. This guide assumes you have a Zapier account and working knowledge of the app you are planning to integrate with Captorra. For this example, we will integrate a Cognito Forms form with Captorra.

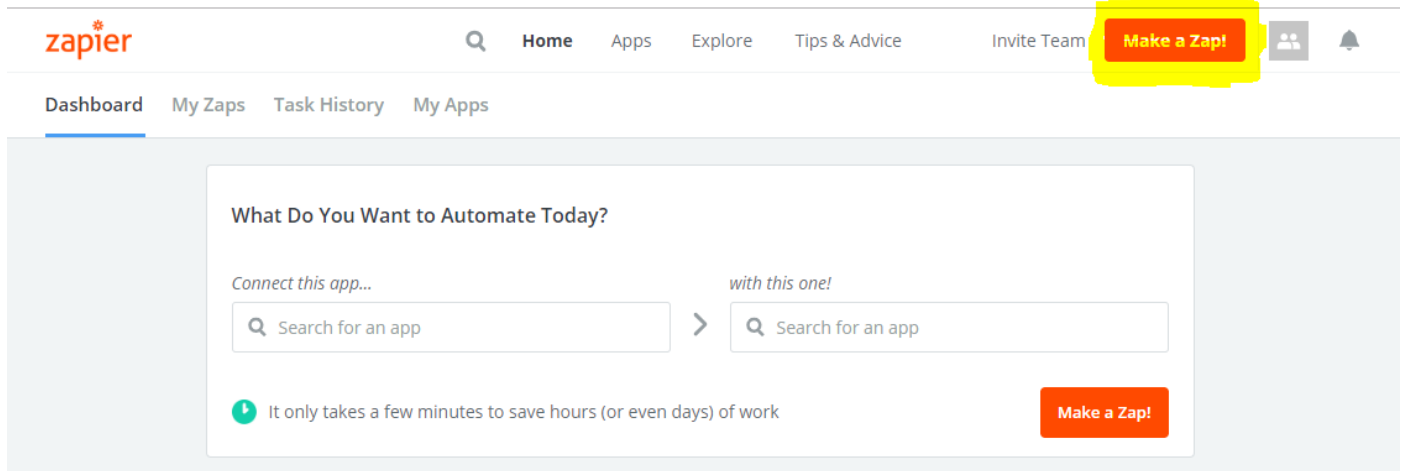


Link your account

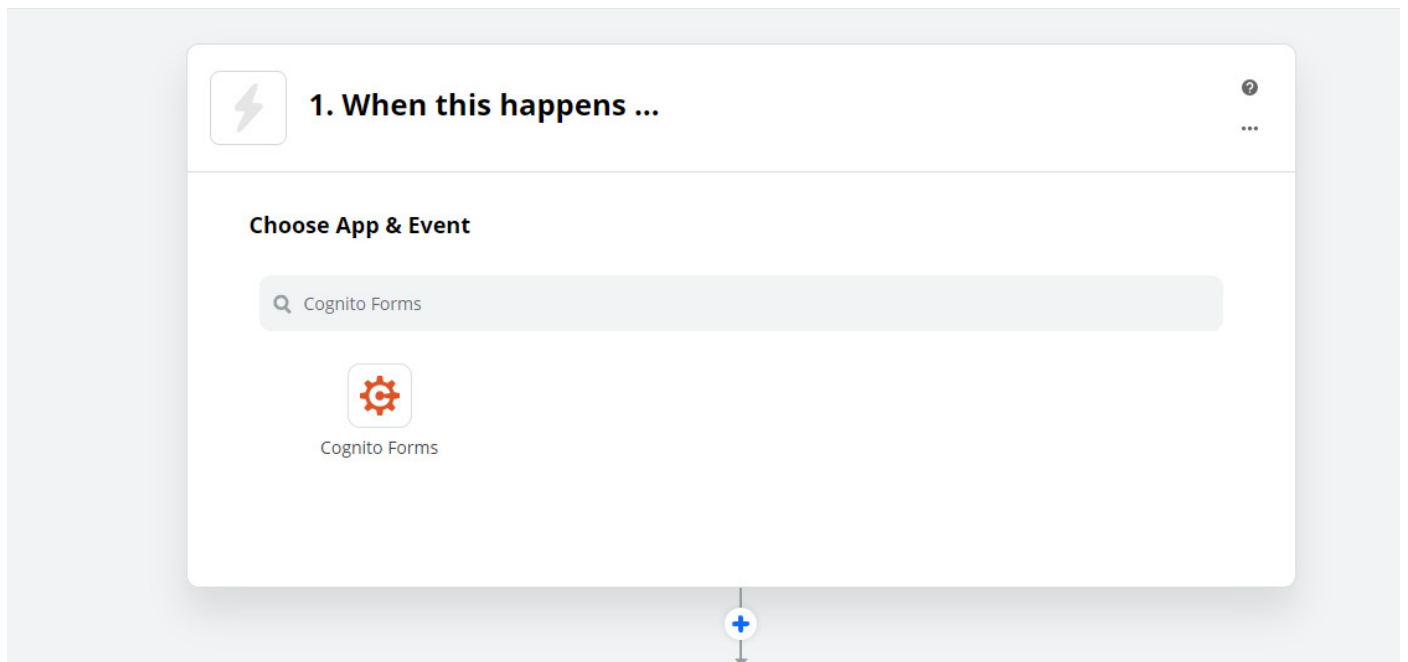
To use the Captorra Zapier integration, please follow the link below while logged in to your Zapier account. This will allow access to our integration.

<https://zapier.com/app/login?next=/developer/public-invite/6689/d3063611bed602e9f87dd2af-1def6203/>

1. Click on “Make a Zap!”

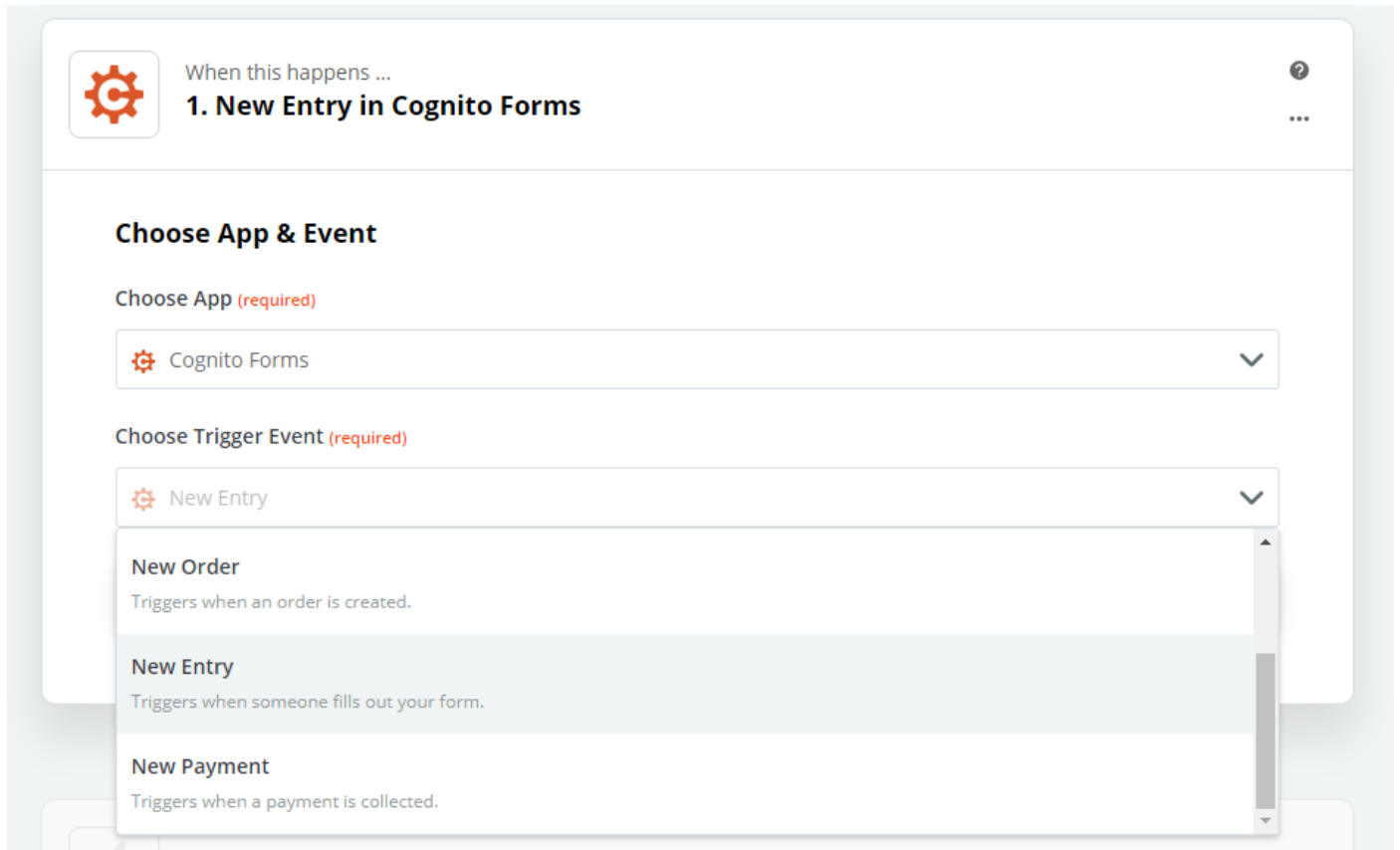


2. Select the Trigger app.



3. Select the Trigger event, in this case we will choose 'New Entry'

Note: This choice may be worded differently depending on the app you are integrating. It may be 'New Submission' or 'New Form Submission'.




The screenshot shows a configuration interface for a trigger event. At the top, there is a header with a gear icon, the text "When this happens ...", and the selected event "1. New Entry in Cognito Forms". Below this, the section "Choose App & Event" contains two dropdown menus. The first dropdown, labeled "Choose App (required)", has "Cognito Forms" selected. The second dropdown, labeled "Choose Trigger Event (required)", has "New Entry" selected. A list of available events is shown below the second dropdown, including "New Order", "New Entry", and "New Payment".


When this happens ... ?
1. New Entry in Cognito Forms ...

Choose App & Event

Choose App *(required)*

 Cognito Forms ▼

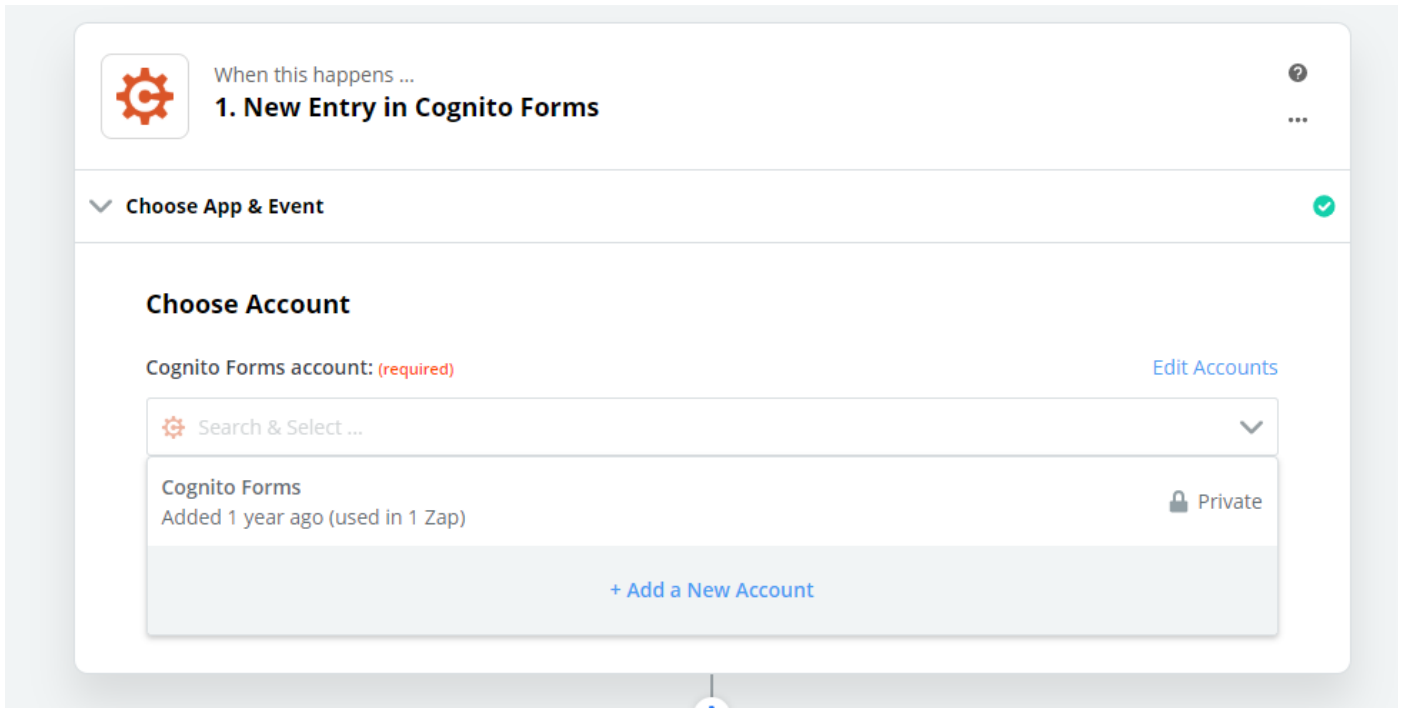
Choose Trigger Event *(required)*

 New Entry ▼

- New Order**
Triggers when an order is created.
- New Entry**
Triggers when someone fills out your form.
- New Payment**
Triggers when a payment is collected.

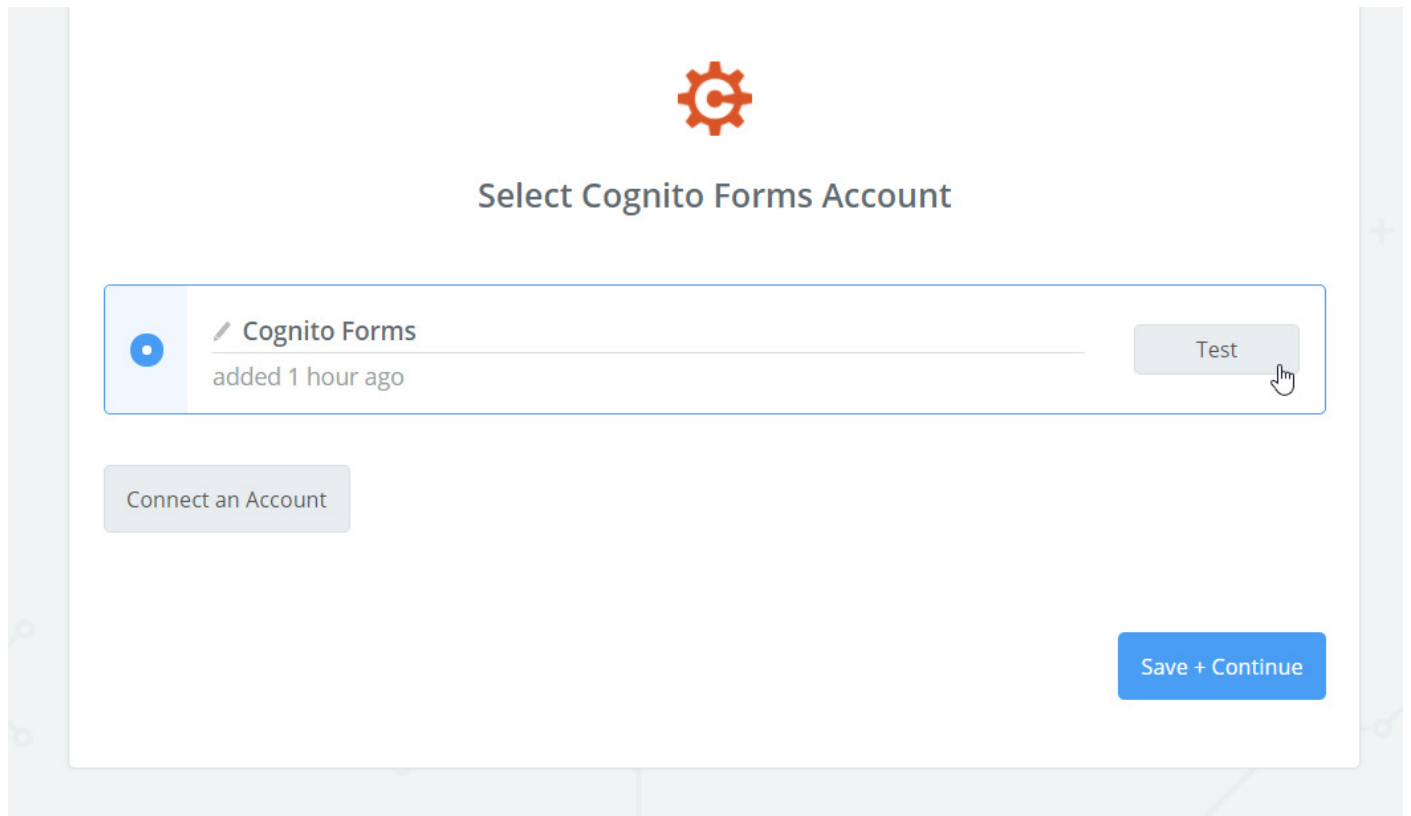
4. Choose Account.

You may need to connect the account, simply follow the instructions as they may vary between apps.



The screenshot shows the Zapier configuration interface for a new Zap. At the top, it says "When this happens ..." followed by the trigger event "1. New Entry in Cognito Forms". Below this is a section titled "Choose App & Event" which is expanded to show the "Choose Account" step. The text "Cognito Forms account: (required)" is displayed in red, with a blue "Edit Accounts" link to its right. A search bar with a gear icon and the text "Search & Select ..." is present. Below the search bar, a list of accounts is shown, with one account selected: "Cognito Forms", "Added 1 year ago (used in 1 Zap)", and a "Private" status icon. At the bottom of the list is a "+ Add a New Account" button.

5. Choose the form you want to integrate.



The screenshot shows a dialog box titled "Select Cognito Forms Account" with a gear icon at the top. The main content area contains a list of accounts. The first account is "Cognito Forms", which has a blue circle icon on the left and a "Test" button on the right. Below the account name, it says "added 1 hour ago". Below the list is a "Connect an Account" button. At the bottom right of the dialog is a blue "Save + Continue" button.

6. You can test & review the form data. It will pull the most recent form post to use as placeholder data.

The screenshot shows the Zapier configuration screen for a new entry in Cognito Forms. At the top, it says "When this happens ... 1. New Entry in Cognito Forms". Below this are three expandable sections: "Choose App & Event", "Choose Account", and "Customize Entry", each with a green checkmark. The "Find Data" section is active, showing a "SKIP TEST" link and a message: "Click any of the buttons below, and we'll test your connection by going out to see if we can find an entry in Cognito Forms." There are two buttons: "TEST & REVIEW" (white with a grey border) and "TEST & CONTINUE" (solid blue).

7. If you selected Test & Review, the latest form data submitted will be shown.

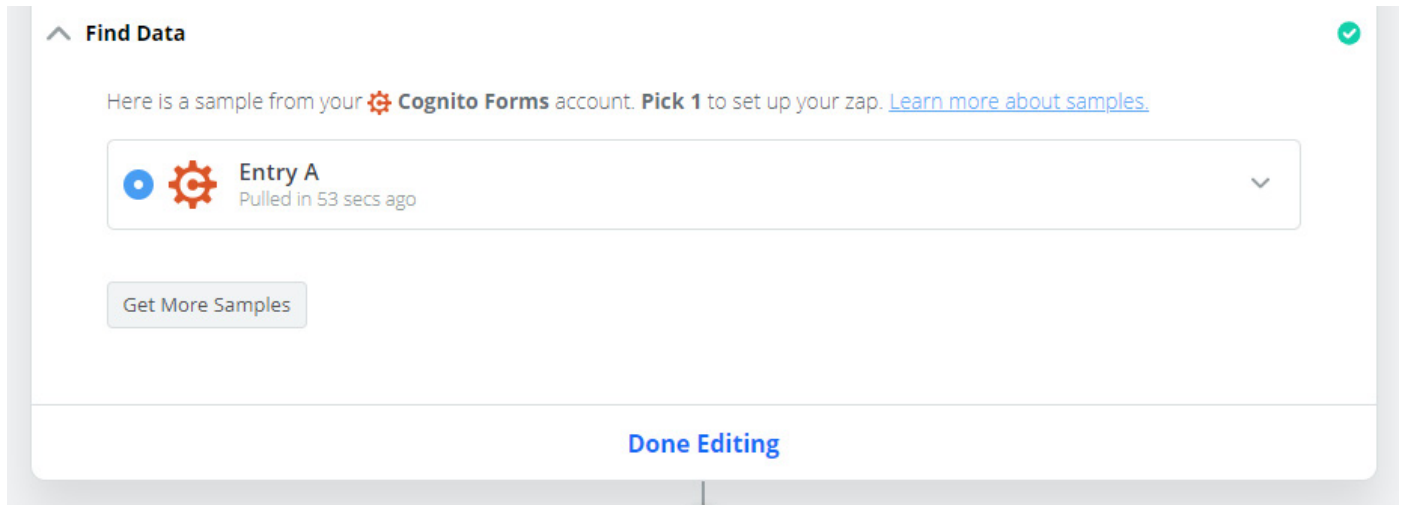
The screenshot shows the "Find Data" section in Zapier. It displays a sample form entry titled "Entry A" with a gear icon and the text "Pulled in 0 secs ago". Below the title is a search bar with a magnifying glass icon and the text "Search...". The form data is displayed in a table-like format:



CaseDetails:	This is a test.
FirstName:	Test
LastName:	Tester
ZipCode:	19146
Email:	test@captorra.com
\$etag:	W/"datetime'2019-07-17T16%3A34%3A32.8803046Z"

At the bottom of the section is a button labeled "Get More Samples".

8. Click 'Done Editing'

Find Data ✓

Here is a sample from your  **Cognito Forms** account. **Pick 1** to set up your zap. [Learn more about samples.](#)

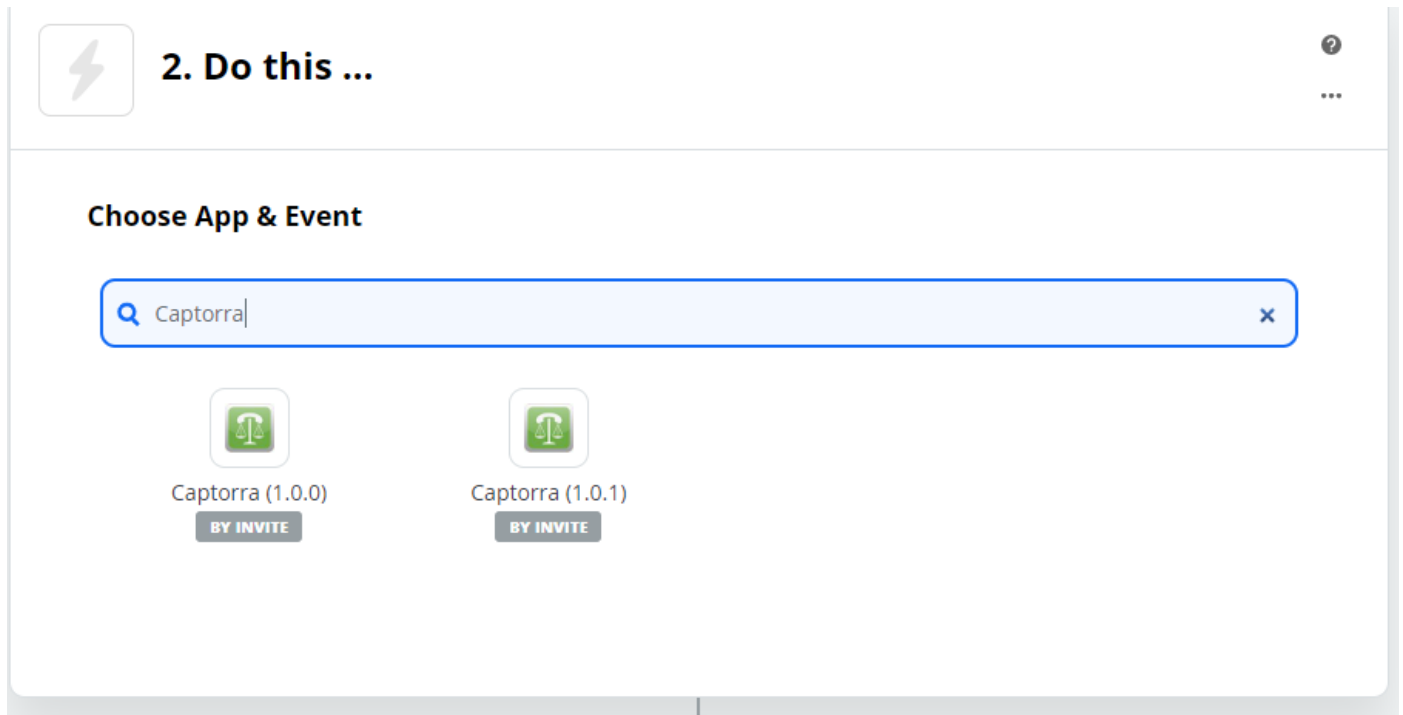
  **Entry A**
Pulled in 53 secs ago ▼

[Get More Samples](#)

[Done Editing](#)


9. For the Action app, search for Captorra and select the latest version if multiple exist.


If the Captorra does not show you may need to activate it via the link at the top of the this page.

 **2. Do this ...** ? ...

Choose App & Event

🔍 Captorra ✕


Captorra (1.0.0)
[BY INVITE](#)


Captorra (1.0.1)
[BY INVITE](#)


10. The first two fields are unique Id's given by Captorra that identify the firm and posting source. Fill in the other fields using the dropdown on the right side of the fields.

The CaptorraId and Referrer GUID will be given by Captorra upon request. Contact support@captorra.com for more information.


▼ Choose App & Event ✔

Customize Intake


Captorra ID (required)

 
Unique ID identifying the Captorra organization.

Referrer GUID (required)

 
Unique GUID identifying the posting source.

First Name (required)

	
Form Name Free Case Evaluation	
ID 1-3	
Entry Number 3	
Entry Status Submitted	
First Name Test	
Last Name Tester	
Entry View Link https://www.cognitoforms.com/Captorra/FreeCaseEvaluation#x0VU7OUIzOHjX2PuRyPEP7vCwX...	
\$etag W/"datetime'2019-07-17T16%3A34%3A32.8803046Z"	
Entry Date Submitted 2019-07-17T16:34:32.011Z	

Email Address (optional)

11. Fill in as many fields as possible.

Details for each field can be found via our API posting instructions here.

Captorra ID (required)

Unqiue ID identifying the Captorra organization.

Referrer GUID (required)

Unqiue GUID identifying the posting source.

First Name (required)

Contact's First Name

Last Name (required)

Contact's Last Name

Primary Phone Number (optional)

Contact's Primary Number

Secondary Phone Number (optional)

Contact's Secondary Number



Email Address (optional)

Contact's Email Address

Address (optional)

12. After entering data into all fields, you can post a test submission to Captorra.

Send Data SKIP TEST

 > 

Send Test Intake to Captorra (1.0.1)

To test Captorra (1.0.1), we need to create a new intake. This is what will be created:

Captorra ID:	432008
Referrer GUID:	6F8EEBC9-35DE-E911-A2CD-00505692291D
First Name:	Test
Last Name:	Tester
Primary Phone Nu...:	5555555555
Secondary Phone ...:	

EMPTY FIELDS:

Secondary Phone ...:	empty (optional)
Address:	empty (optional)
City:	empty (optional)
State:	empty (optional)
Zip Code:	empty (optional)
County:	empty (optional)

TEST & REVIEW

TEST & CONTINUE

13. If the test was successful, you will see the following screen.

If you receive an error at this point, contact support@captorra.com and include the error message.

Send Data



Test was successful!

We'll use this as a sample for setting up the rest of your Zap.

 A Test intake was sent to Captorra (1.0.1) in about 1 second.

We created an intake! We were able to create an intake in your Captorra (1.0.1) account.

Intakeld: df4cc7d9-1ef0-e911-a2cf-00505692291d

success: true

RETEST & REVIEW


RETEST & CONTINUE

[Done Editing](#)

14. Your Zap is now Ready! Name it and Turn is on.

Once turned on, any form posts will automatically be populated in Captorra!

WELCOME TO THE NEW EDITOR! [SEE WHAT'S NEW.](#)

 / Cognito To Captorra



Your Zap Is Ready!

Turn it on & try it out!

[TURN ZAP ON](#)

[BACK TO SETUP](#)

Visit captorra.com for more information

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info@captorra.com