


4. Choose Account.

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





When this happens ...
1. New Email in Gmail

▼ **Choose App & Event** ✓

Choose Account

Gmail account: *(required)* [Edit Accounts](#)


 Gmail captorra@gmail.com ▼

 Gmail is a secure partner with Zapier. [Your credentials are encrypted & can be removed at any time.](#)

CONTINUE

+

5. Choose ZDW you want to integrate.




When this happens ...
1. New Email in Gmail

▼ **Choose App & Event** ✓


▼ **Choose Account** ✓

Customize Email

Label/Mailbox

 INBOX ▼

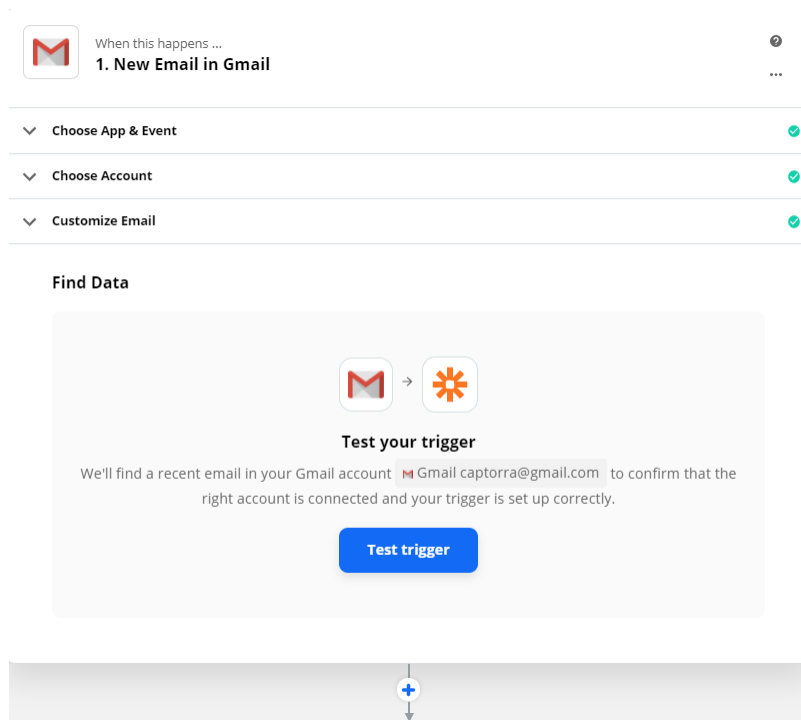
(Note: If no Label/Mailbox is selected, this Zap will trigger on all e-mails, including Drafts.)

 Refresh Fields

CONTINUE


+


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



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

Find Data

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

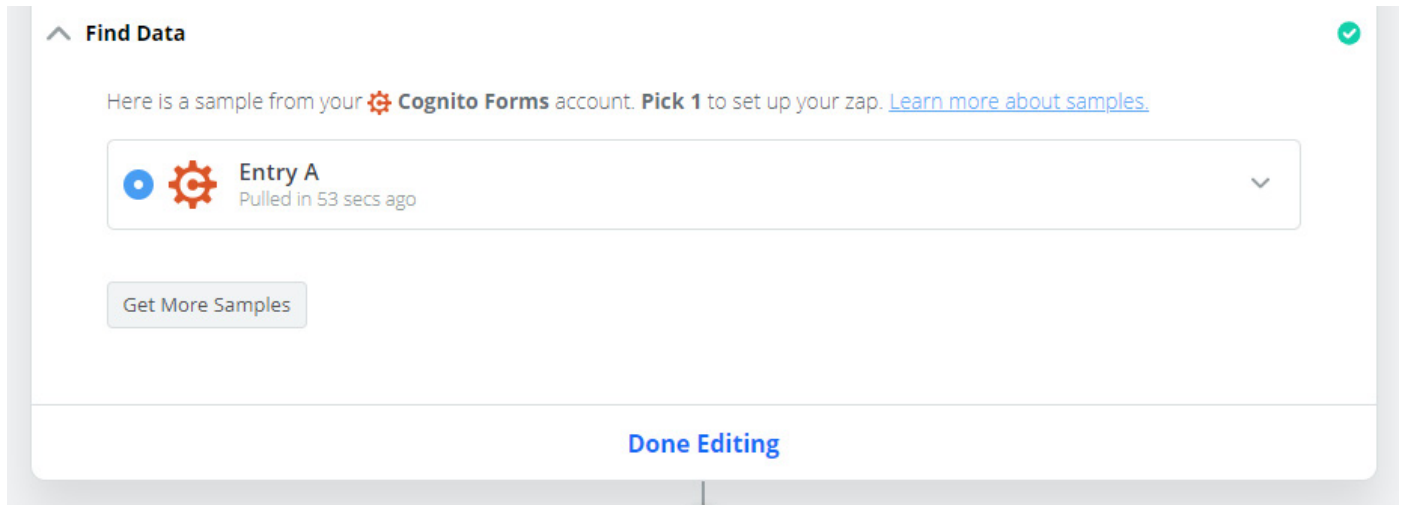
 **Entry A**
Pulled in 0 secs ago

Q Search...


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



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.](#)

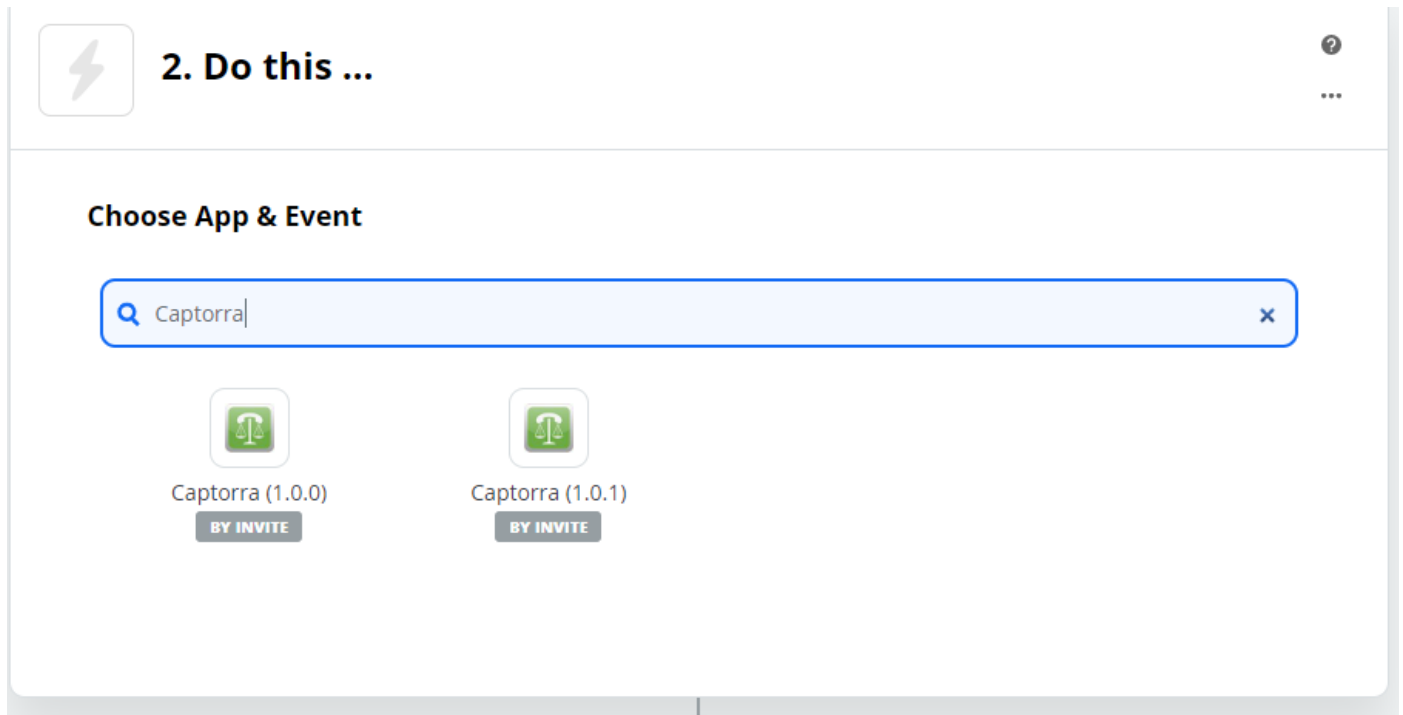
  **Entry A**
Pulled in 53 secs ago ▼


[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)

 
Unqie ID identifying the Captorra organization.

Referrer GUID (required)

 
Unqie 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#x0VU7OUIzOHyJX2PuRyPEP7vCwX...	
\$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

855-464-6825
info@captorra.com