



Zapier Blue Form Builder plugin

User Guide

Version 1.0



Table of Contents

I) Introduction	2
II) Where To Find Plugin	3
III) Create Zapier API Key	4
IV) Create A Zap In Zapier	8
Step 1: Set Up Trigger	10
Step 2: Set Up Action	16
Step 3: Turn On Your Zap	17
V) Support	18



I) Introduction

Zapier plugin is a perfect solution for connecting Blue Form Builder forms with 2000+ web apps. No manual tasks are required. Zapier plugin will automatically send form submission data to any apps you've connected.

- Connect Any Forms With 2000+ Apps
- Streamline Your Workflows

Note: Zapier is a plugin of Blue Form Builder extension. Please pre-install Blue Form Builder. After that, install Zapier plugin and it will be integrated with existing Blue Form Builder on your website.



II) Where To Find Plugin

- After installing the plugin, navigate to **Stores > Settings > Configuration**:

Ŵ	Stores ×			👤 zapier 👻
DASHBOARD	Settings Configuration			Save Config
CONTENT 12	Coniiguration	^	General Settings	\odot
\$			reCaptcha	\odot
			reCaptcha3	\odot
			Form Summary	\odot
			Mailchimp	\odot
			Zapier	\odot
			Design Settings	\odot

In the left panel, span **MAGEZON EXTENSIONS** and click on **Blue Form Builder.** In the right section, open the **Zapier** tab where you can enable/disable the plugin:

Ŵ	Configuration		Save Config
DASHBOARD		General Settings	\odot
CONTENT	Blue Form Builder	reCaptcha	\odot
STORES		reCaptcha3	\odot
SYSTEM		Form Summary	\odot
		Mailchimp	\odot
		Zapier	\odot
		Enabled [store view]	
		Design Settings	\odot



III) Create Zapier API Key

First, you need to create the Zapier API key which is used to connect your Zapier account and your Blue Form Builder forms.

- Go to System > Extensions > Integrations:

Ŵ	System	×				
CASHBOARD	Extensions					
CONTENT 42	Integrations					上 zapier 👻
STORES	Tools				Add	New Integration
SYSTEM	Cache Management	cords found		20 • per p	age <	1 of 1 >
			Status	Activate	Edit	Delete
			•			
	Magento Analytics user		Active	Reauthorize	1	*
	Zapier		Active	Reauthorize	1	•

- You can either edit an existing integration by clicking on the edit icon in the **Edit** column of the grid...



		A	Add New Integra
	20	· per page <	1 of ²
Status	Activate	Edit	Delete
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	Status Image: Control of the status <td< td=""><td>Status Activate Active Reauthorize</td><td>Z0 v per page Status Activate Edit Active Reauthorize Image: Compare the state of the st</td></td<>	Status Activate Active Reauthorize	Z0 v per page Status Activate Edit Active Reauthorize Image: Compare the state of the st

...or create a new integration by clicking on the **Add New Integration** in the upper right corner:

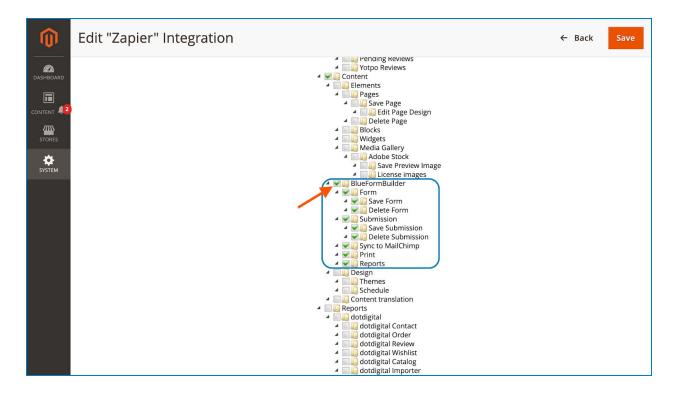
CONTENT #2	Integrations				1 zapier 🕶
STORES				Add	New Integration
SYSTEM	Search Reset Filter 2 records found		20 v pe	r page 🧹	1 of 1 >
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	Zapier	Active	Reauthorize	1	ŵ
	() Copyright © 2020 Magento Commerce Inc. All rights reserved.		Prive	<u>icy Policy</u> <u>Account</u>	Magento ver. 2.3.5-p1 Activity Report an Issue



- In the **BASIC SETTINGS** panel on the left, open **API** tab:

	Edit "Zapier" Inte	gration	1	zapier 👻
CONTENT			← Back	Save
STORES	BASIC SETTINGS	Available APIs		
SYSTEM	In egration Info	Resource Access	Custom •	
	API	Resources	 Zashboard Magezon Analytics 	
			API Sales Operations	
			 Image: Create Image: Create 	
			 View Send Order Email Reorder 	

- Tick BlueFormBuilder:





- After that, open **Integration Info** tab and you should see a new section called **Integration Details** with **Access Token** field that contains the Zapier API key.

Ŵ	Edit "Zapier" Integration			← Back	Save
DASHBOARD	Current User	er Identity	Verification		
CONTENT 42	Your Pass	sword *			
	Integration I	Details			
SYSTEM	Consume	er Key	7eepijbhfr4sdu2fwi87dar1dgsmsk9k		
		sumer Secret	ky9rknneph8palp02dsela1k2khi8oc0		
	Access T	Token	3l93pb0239no99cjqgc&zldtk15wx65t		
	Access T S	Token Secret	rh5m97gzg8bkud0elypusbc1dncg0xpm		

Note: Make sure that your integration has been activated. If not, click **Activate** in the **Activate** column in the grid:

lı	ntegrations				上 zapi
				Add	New Integratio
				-	ő
	✓ The integration 'Zapier Connection' has been saved.				
	Search Reset Filter 3 records found		20 v pe	r page 🛛 <	1 of 1
	Name	Status	Activate	Edit	Delete
					
3	Magento Analytics user	Active	Reauthorize	1	*
1	Zapier	Active	Reauthorize	1	*
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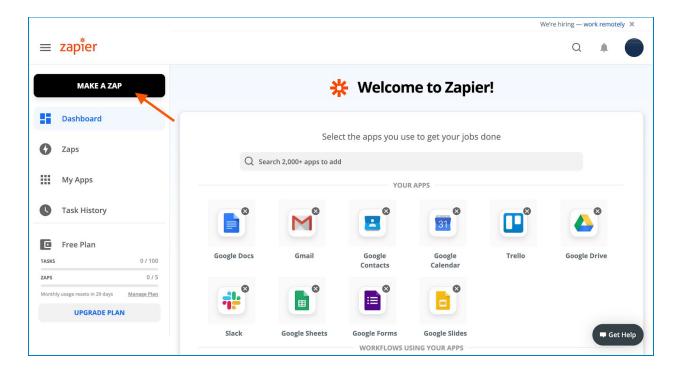


IV) Create A Zap In Zapier

In Zapier, a zap is an automated workflow that connects your apps and services together.

- To create a zap, you'll need to log into your Zapier account. If you don't have an account yet, you can create one at <u>zapier.com</u>. You can choose the free plan or paid tiers based on how many zaps you'll be using.

- After you've accessed your Zapier account, click **MAKE A ZAP** black button in the upper left corner to create a zap...



...and you'll navigate to the setup page of the new zap:



New: Share a copy of your Zap with anyone. Learn More. SHARE < 🔆 🖊 🗸 Name your zap OFF ₽ 0 0 1. When this happens 0 0 Choose App & Event ф Q Not seeing your app? Search here ... Your Apps M Google Docs Google Drive Gmail Google Sheets -31 Ê Slack Trello Blue Form Builder Google Calendar BY INVITE SHOW MORE

- Click **Name your zap** in the upper left corner to rename your zap:

		New: Share a copy of y	our Zap with anyone. <u>Learn More</u>	2.			
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							O
Choose	e App & Event						\$
Q NO	ot seeing your app? Search	here					
	Google Docs	You Google Drive	r Apps	Google Sheets			
	slack	Trello	Blue Form Builder BY INVITE	Google Calendar			



Step 1: Set Up Trigger

Trigger is an event that starts a Zap. You'll set up the trigger in the **1. When this happens** section.

Select trigger app: The trigger app that needs to be selected here is Blue Form Builder.
In the **Choose App & Event** search box, type Blue Form Builder and click Blue Form
Builder from the result list.

New: Share a copy of your Zap with anyone. Learn More.	
< 🔆 🖊 Name your zap	SHARE OFF
	=
 1. When this happens 	0
	0
Chaosa Ann & Evant	O
Choose App & Event	\$
Q Blue Form Builder	
Blue Form Builder BV INVITE	
÷	
2. Do this	

- Select trigger event: Once you choose the trigger app, then you can **Choose Trigger Event**. Blue Form Builder only has 1 trigger (New Submission Entity) and it's automatically selected.



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When this happens When this happens I. New Submission Entity in Blue Form Builder		0
		0
		O
Choose App & Event		\$
Choose App (required)		
Blue Form Builder		
Choose Trigger Event (required)		
New Submission Entity		
CONTINUE		

- Select app account: connect Zapier to Blue Form Builder on your website by clicking on the **Sign in to Blue Form Builder** button:

	New: Share a copy of your Zap with anyone. Learn More.			
< 🔆 🖊 Name you	r zap		SHARE	OFF
				=
	When this happens			0
	1. New Submission Entity in Blue Form Builder			0
	✓ Choose App & Event	0		G
				\$
	Choose Account			
	Sign in to Blue Form Builder			
	Blue Form Builder is a secure partner with Zapier. <u>Your credentials are encrypted & can be removed at any time</u> .			
	TO CONTINUE, FINISH REQUIRED FIELDS			
	Ţ.			
	2. Do this			



Zapier

A new window will appear:

Allow Zapier to access your Blue Form Builder Account?
Domain (required)
Please provide a full URL domain (EG: https://example.com/). Be sure to include http:// or https://.
http://blueformbuilder.m2.magezon.com
Admin username (required)
zapier
Admin password (required)
API (required)
Go to the API Details page from your website dashboard to find your API key.
3l93pb0239no99cjqgc8zldtk15wx65t
Yes, Continue Cancel

- **Domain**: enter the full URL of the domain in which Blue Form Builder is installed.
- Admin username: enter admin username.
- Admin password: enter admin password.
- **API**: enter the access token key here.

Then click **Yes, Continue** button to finish the connection.

Please note that you can connect Zapier with multiple accounts by clicking **Add a New Account**:



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	When this happens 1. New Submission Entity in Blue Form Builder	@ 		
	✓ Choose App & Event	0		0
	Choose Account			\$
	Blue Form Builder account: (required)	Edit Accounts		
	Blue Form Builder (1.0.0) zapier	\sim		
	Blue Form Builder (1.0.0) zapier zapier (used in 0 Zaps)	A Private		
	+ Add a New Account			

Click **Continue** to proceed.

- Select form: Select the form you want to use in this zap, then click **Continue**.

New: Share a copy of your Zap with anyone. Learn Mor	<u>e</u> .	
< 🔆 🖊 Name your zap		SHARE O OFF
✓ Choose App & Event	0	=
✓ Choose Account	0	0
Customize Submit		0
Form Contact Form	*	۵
Form Custom		
Q Search		
Contact Form Advanced Contact Form 2		
35 Form Elements		
Delivery Feedback		

- Test trigger: In this step, you are able to test your connection using sample submission data pulled in. Please make sure that the form you selected has at least one submission to test. After clicking the **Test Trigger** button, ...





	New: Share a copy of your Zap with anyone. Learn More.			
< *	1. New Submission Entity		SHARE	OFF
	✓ Choose Account	0		=
	✓ Customize Submit	0		0
	Find Data			0
				C
				\$
	👔 → 💥			
	Test your trigger			
	We'll find a recent submit in your Blue Form Builder account [] Blue Form Builder (1.0.0) zapier to confirm that the right account is connected and your trigger is set up correctly.			
	to confirm that the right account is connected and your trigger is set up correctly.			
	Test trigger			
	+			
	•			

...you should see a submission found with all related data:

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				0
	Find Data			0
				•
	We found a submit! This submit was found in your 🖪 Blue Form Builder (1.0.0) zapier account. <u>Learn more about test data.</u>			O
				\$
	🗎 Submit C 🗘			
	Search			
	name: Bao Cao The123123			
	email: baomgt@gmail.com			
	phone: 354082353			
	message: HELLO WORLD 123 123123			
	file: 0: http://blueformbuilder.m2.magezon.com/pub/media/blueformbuilder/submission/m/a/marketplace-			
	tools_1.png			
	increment id: 00000046			
	store_id: 1			
	creation_time: 2020-08-19T23:04:54+00:00			
	id: 1			





You can choose another submission to test from the drop-down menu where latest submissions are listed:

	New: Share a copy of your Zap with anyone. Learn More.			
< 💥 🗡 Name your zap			SHARE	OFF
~	Customize Submit	0		=
				0
	Find Data			0
	We found a submit! This submit was found in your Bilue Form Builder (1.0.0) zapier account. Learn more about test data.			0
				\$
	🔋 Submit C	•		
	Choose another	×		
	Submit C Pulled in 4 minutes ago			
	O Submit B Pulled in 4 minutes ago			
	Submit A Pulled in 4 minutes ago			
	Load More			
	creation_time: 2020-08-19T23:04:54+00:00			

Click the **Continue** button to proceed.



Step 2: Set Up Action

An action is an event that a Zap performs after it is triggered. You will set up action in the **2. Do this...** section.

First, choose the app which you want to send your submission data to:

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	2. Do this						0
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	Choose App & Event						C
					_		\$
	Q Not seeing your app? Sea	arch here					
		Your	Apps				
	Google Docs	Google Drive	Gmail	Google Sheets			
	i		31				
	Slack	Trello	Google Calendar	Google Contacts			
		SHOW	/ MORE				
		Built-	In Apps				

After that, you will select the action event, select the app account, customize the action and test the action to send submission data to your chosen app. The custom options in these steps vary depending on each app.



Step 3: Turn On Your Zap

After you finish customizing your app, you can turn it on by clicking to toggle the **switch** ON in the upper right corner. Once the zap is turned on, Zapier will run your action steps each time your trigger event occurs.

New: Share a copy of your Zap with anyone. Learn More.	
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When this happens 1. New Submission Entity in Blue Form Builder	■ 0 0
Do this 2. Upload File in Google Drive	۵
Share Feedback	



V) Support

If you have any questions or need any support, feel free to contact us via the following ways. We will get back to you within 24 hours since you submit your support request.

- Submit contact form.
- Email us at support@magezon.com.
- Submit a ticket.
- Contact us through Skype: support@magezon.com.
- Contact us via live chat on our website: magezon.com.