Zapier Integration

Zapier can be used with CommCare to trigger 100s of actions based on incoming CommCare form submissions or case modifications. These integrations enable you with near-limitless possibilities for your data—including syncing to Google Sheets, triggering emails, and connecting to hundreds of other applications supported by Zapier.

This feature requires a CommCare Software Plan

This feature (Zapier Integration) is only available to CommCare users with a Standard Plan or higher. For more details, see the CommCare Software Plan page.

The following article walks you through the setup process of a basic Google Sheets integration with Zapier triggering off a CommCare form submission. Workflows based on cases, or integrations with other Zapier apps, follow a very similar pattern.

Prerequisites

To begin setting up your integration you will need the following:

- An account with Zapier
- A project space on CommCareHQ with an application.
- Have submitted a form with the application you want to setup the integration for.

Setup CommCare Trigger

1. Proceed to your Zapier and log in to your account.
   a. If you have not created an account, proceed to www.zapier.com and sign up for one.
2. Once logged in, select Make a Zap at the top of the page
3. On the next page, you will be prompted to ‘Choose a Trigger App.’ Search for and select CommCare.

4. For ‘Select CommCare’ trigger, choose New Form. This should be the only option you can choose. Select continue.
5. When on the page that asks you to ‘Connect an Account,’ select create a new account.
6. A new window should pop up asking for your username and API key.
   a. The user name should be a web user account that you login to CommCareHQ with.
   b. The API Key can be found by proceeding to My Account Settings of CommCareHQ. Select the Gear icon in the top right, followed by My Account Settings:
6. On the My Information page, you should see the API key. Copy and paste this string into the corresponding field in Zapier:

7. You should now be on the Set up CommCareHQ Form
   a. Select the Domain, Application and Form that you would like to trigger the action for. Select continue once you choose the form.
      i. You need to have submitted a form for the application you are setting the zap up for. It does not matter when this form was submitted, just that the application has been used before. If you're defining your domain through Use a Custom Value, you must enter your domain as it appears in your browser's URL. For example, a project named Zapier Test will appear in the URL as "zapier-test" and must be entered into Zapier as such.

8. After selecting the Domain, Application and Form, you will be brought to a page where you can test the setup. Select 'Fetch and Continue'

If step 8 succeeds, you have now successfully created the trigger for your Zapier integration! It is now time to set up the action.

If step 8 does not succeed, ensure that you have set up the integration as a Web User and not a mobile worker. For clarification on the difference, please proceed to the following page

With your CommCare Trigger now set up, we need to set up the action that will occur!

Applications to Integrate With

This section is a work in progress and will be updated with more applications to integrate with.

Google Sheets