

Zapier - SherloQ Instructions

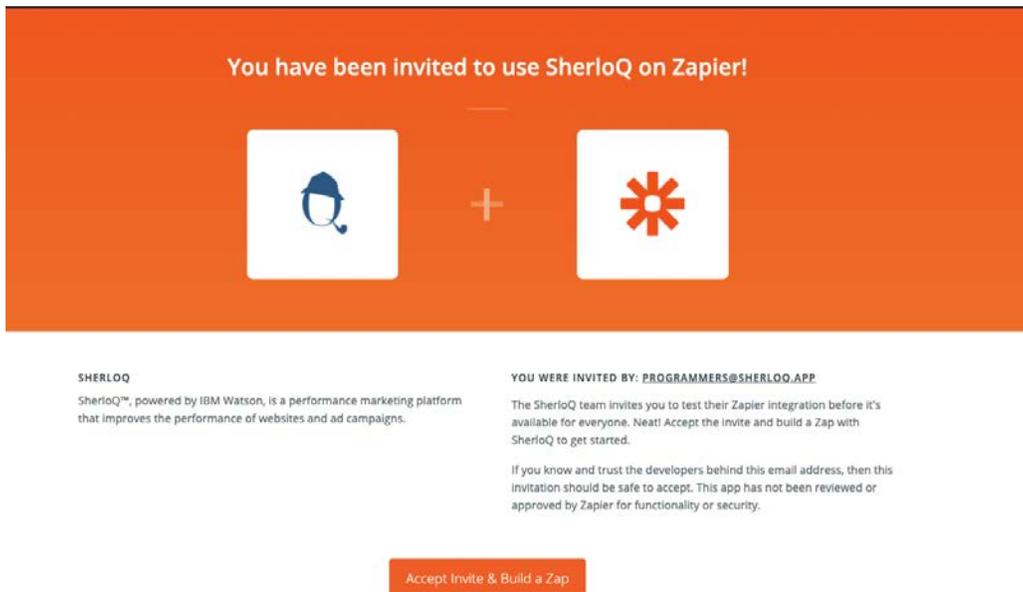
Overview of the SherloQ Integration

The SherloQ Zapier integration allows those with a SherloQ account and a Zapier account to have information about their new leads forwarded to any of Zapier's 4000+ integrated applications, or to their own API. This provides SherloQ users with a way to import their lead data to other platforms.

How to Access the SherloQ Integration

The SherloQ integration is accessible by invitation. Contact your account manager to request access. An invitation will be sent to you via email.

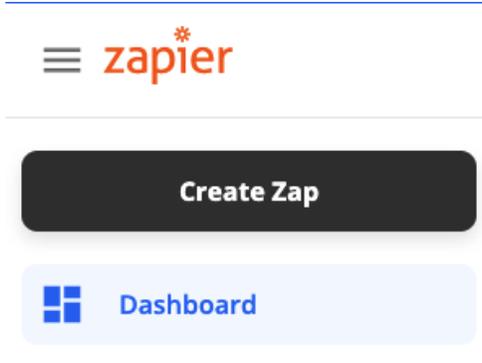
After receiving the link in your email, click on the link. You will be directed to the following page:



After clicking to accept the invite, you will be able to choose the SherloQ app when creating new Zaps in your Zapier account.

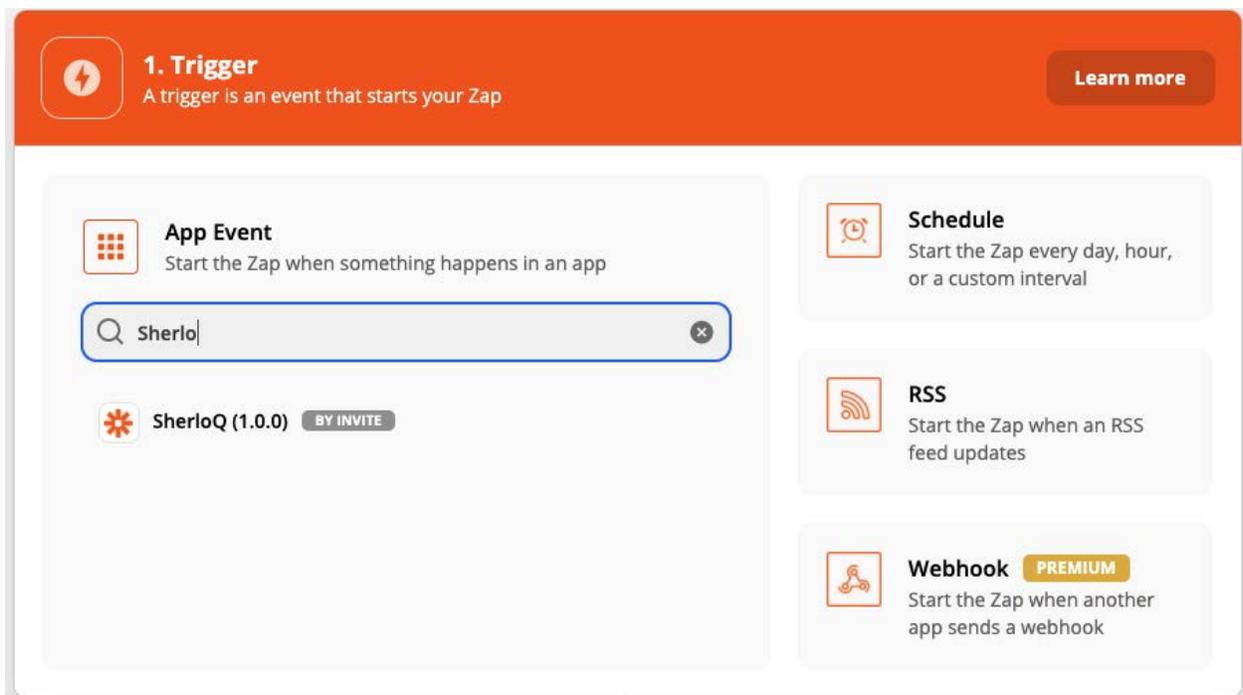
Creating a SherloQ Zap

Navigate to zapier.com/app/dashboard within your Zapier account and click on **Create Zap** in the left hand menu.



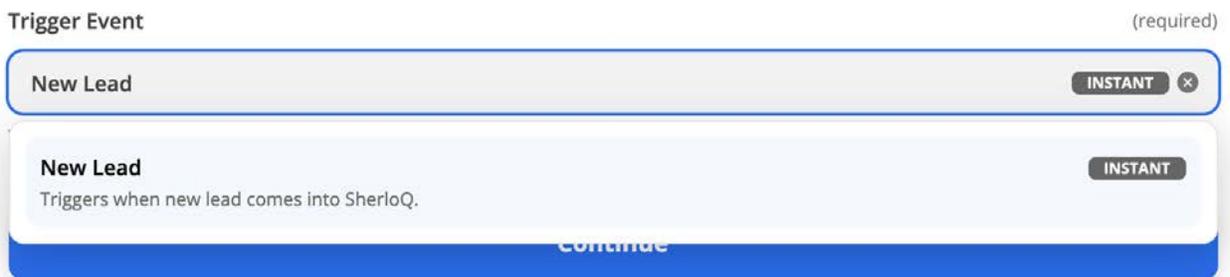
Name your zap in the top left hand corner.

Next, search for the SherloQ App Event by typing “SherloQ” in the search bar:



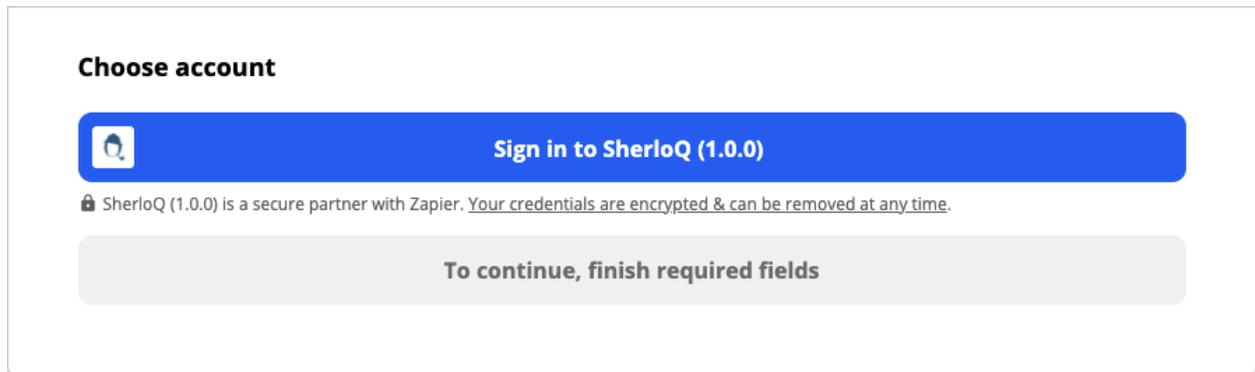
Click on SherloQ (1.0.0) BY INVITE.

Next, click on “Choose an Event” and choose “New Lead”.



Then click the big blue “Continue” button.

Next, click the big blue “Sign into SherloQ” button.



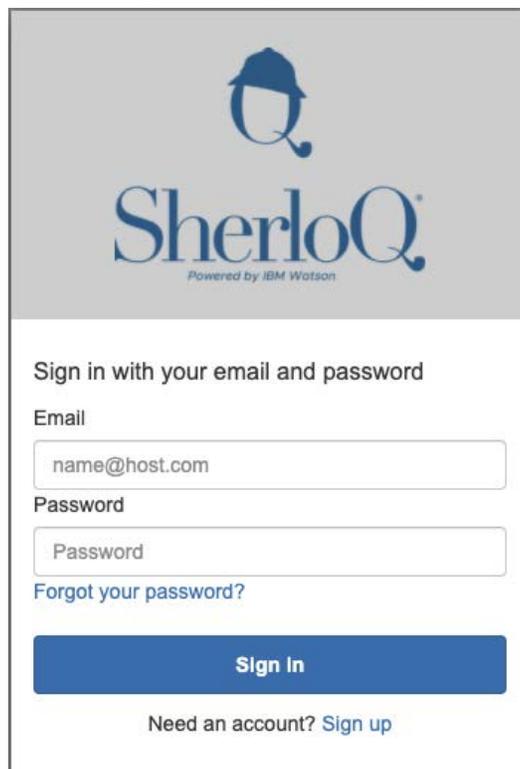
Choose account

 **Sign in to SherloQ (1.0.0)**

 SherloQ (1.0.0) is a secure partner with Zapier. [Your credentials are encrypted & can be removed at any time.](#)

To continue, finish required fields

You will see a login box where you will sign in with your SherloQ username and password.




SherloQ
Powered by IBM Watson

Sign in with your email and password

Email

Password

[Forgot your password?](#)

Sign In

Need an account? [Sign up](#)

Press Continue once again.

Now you will see a big blue “Test Trigger” button. Click that. This will test your connection with a sample lead. The lead used in the test does not contain real data.

Note that sample leads can only contain fields that exist in every lead. The fields in SherloQ leads differ between emails, calls, & chats. When you map fields in the next step, you will be able to see all possible fields that a lead can contain.

Test trigger



We found a lead!

This lead was found in your [SherloQ \(1.0.0\) #2](#) account. [Learn more about test data.](#)

Lead A ⌵

Search...

leadCategory: call
leadId: 7666067ab3
firstName: Martin
lastName: Wilson

Then click the big blue “Continue” button.

Now you can decide what they want to do with the data coming from the SherloQ API. You can choose from any of Zapier's integrated apps or forward the data to your own API.

Next, you can map lead fields to whichever Zapier integration you choose. Finish your mapping and leads will start forwarding to you!