Tray.io Integration

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This document covers how to send data from FormAssembly to Tray.io. Once data is sent to Tray.io it can be sent to another software application. For this example, we will be sending data from FormAssembly to Tray.io to Constant Contact.

Tray.io is compliant with **SOC 2 Type 2, HIPAA**, **GDPR & CCPA** - Please see the Data Protection article for more information on Tray.io security standards.

Requirements

- FormAssembly HTTPS Connector
- FormAssembly Essentials plan and higher, or legacy Professional and Premier plans

Step 1 - Configure Webhook Trigger

To begin, create a new workflow within tray.io, and select Webhook Trigger.

Once inside the Tray.io builder, configure the Webhook Trigger by doing the following:

- 1. Click on the ellipsis, located in the upper right-hand corner.
- 2. Select Settings.

 Webhook (trigger) Auto respond with HTTP 200 Auth Step inputs Export as JSON Stop all execution Webhook 		Organization ⑦
Auto respond with HTTP 200 Description Auth Step inputs C Import workflow Import workflow	🛞 Webhook (trigger)	🌮 Config data
Title * Webhook	Auto respond with HTTP 200	
Webhook		C 🕃 Export as JSON
Description		Stop all execution
	Description	
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- 3. Find and copy the Workflow Public URL.
 - Paste this into your FormAssembly HTTPS Connector, where it asks for a Remote Script URL
- 4. Exit out of the settings pop-up.
- 5. Go back to the ellipsis and click **Config data**.
- 6. Add labels to all the information you want to send to Tray.io. The labels should match what is mapped within the HTTPS Connector.

Configurable data		
Add and update workflow configura Name	Value	
tfa_1	<empty string=""></empty>	1 Î
tfa_2	<empty string=""></empty>	I Î
tfa_3	<empty string=""></empty>	1 Î
Type property name	<empty string=""></empty>	0
Type property name	<empty string=""></empty>	Ø

- 7. Click Save configuration.
- 8. Submit the FormAssembly form and check the logs in Tray.io to ensure the information flows through to Tray.io successfully.
- 9. While in the logs, make sure to click the **Use output** option, located directly above the data shown in red.

5 6				Build Logs
Search executions	د Search step: ۹	< Webhook	🖌 Go to step	
08/03/2022 11:0 successful in 68ms	Webhook trigger (fire_and_for	Search		
		Input D Copy	[] Expand) Webhook trigger
		1 () Output (> Use output () Copy	C Expand	
		<pre>1 { 2 "method": "post", 3 "path": "/", 4 "body": { 5 "tfa_1": "test1", 6 "tfa_2": "test2", 7 "tfa_3": "t3@gmail.com" 8 }, 9 "query": {}, 10 "headers": { 11 </pre>		

Step 2 - Configure Constant Contact

1. Click the (+) sign beneath the Webhook Trigger and select Service Connectors.

) Search apps and tools	
Service connectors	Logic tools
Connect external apps	Add workflow logic
M Gmail 🥱 Airtable All >	- Boolean 🕤 Loop All
Work with data	Helpers and utilities
Import, export, manipulation	Text, dates, objects, and mor
Storage	PDF T Text Al

- 2. Search for and select Constant Contact.
 - A box should appear on the right-hand side, that has an **Auth** tab.
- 3. Click New Authentication to connect to your Constant Contact account.
- Directly above the Auth tab, you should see a drop-down menu. Click and select what you would like Tray.io to do with this information upon sending it to Constant Contact. For example purposes, I have chosen to Create or Update Contact.
- 5. To the right of Auth, select Step Inputs.
- 6. Map each field by clicking the small circle to the left of the field and dragging it to the Webhook trigger.
 - You should see a snake-like string appear.
 - Continue to map each field.

Build Logs	Organization
	Constant contact (constant-contact-1) ③
Webhook	Create or update contact
Q	Description Auth Step inputs Output data E
A path	Email address* 📀 💈
⊭ body A tfa_1	
- A tfa_2 - A tfa_3	○ List memberships*
□ query	Add to List memberships
⊟ headers A accept	First name 💿 💈
A accept-encoding A content-length	Image: Starter Strate S.steps.trigger.body.tfa_2
A content-type	Last name 📀 3
- A host A referer	tfa_3 \$.steps.trigger.body.tfa_3
A user-agent	
	Job title

7. Where it says **List memberships**, you will want to select **Add to List memberships**. Select which list the contact goes into.

Step 3 - Check that it works!

- 1. Submit a new form response from FormAssembly.
- 2. Within the logs of Tray.io, confirm that the information is flowing correctly and is successful.

5 C			Build Logs
Undo ch executions	۲ Search step: ۹	< Constant contact In Go to step	
08/03/2022 11:02:4 successful in 68ms	Webhook trigger (fire_and_forget)	Search	
08/03/2022 12:04:32 PM stopped	Constant contact	Input D Copy () Expand	Webhook trigger
08/03/2022 12:0 successful in 1s 923 ්ර		<pre>2 "email_address": "who@gmail.com", 3 "first_name": "Nancy", 4 "last_name": "Nho", 5 "list_memberships": { 6 "45f8b150-a25b-11e8-80d9-d4ae5292c47c 7] 8 } Output (-> Use output () Copy () Expand 1 { 2 "contact_id": "0a7f8d14-1346-11ed-b5cb- 3 "action": "created" 4 }</pre>	Constant contact constant-contact-1

3. Lastly, check Constant Contact to make sure the data is there!