

1CRM & INTEGROMAT

A Guide to Integromat Integration Setup for Xero & Quickbooks Online

	1CRM System ENT-8.5.0 • 1CRM Corp. Public Demo (50U)			Q Search -		🛱 Wednesda	iy January 24, 2018		⊠ 39		88 admin	
	Today's Activities	Sales & Mar	keting	Order Management		Project Management	Custome	Service	1	Reports & Settings	1	CF
	🖹 🖶 Home Dashboar	rd									[\$ *
	🚍 Calendar			* % = 2	🔊 Opportur	nities Funnel Chart		* 13	🔊 My C	Contacts	\$	Q 12
	Day Week Mon	th 🔲 Year				Pipeline tota	l is \$5,145.00K		Creat	te	Page 1 2	2 3
	∢ Jan	uary 2018	►	Select Date -			Prospectin		Name	e 🔤	Office Phone	
	🔯 Activities 🔻 🔒 Me 💌		Calls Meeti	ngs 🕑 Tasks More (1) 🔻	365		- 545 Qualification		Amb	per Alsup	% +1 (835)	146-7
	Week Mon	Tue Wee	I Thu	Fri	480		565 Value Prop			sity Aranda	% +1 (791)	
		2	3	4 5		67				tney Bessey	% +1 (280)	
		-	, in the second s		4	55 - 395	Perception Proposal/P		-	dal Botsford	% +1 (488)	
12:26	. il 🗢 🗈	9	10	11 12		500 - 480	Negotiation	/Review	6 Bran	ndie Boyster	% +1 (351)	551-24
= ∿ 🛱	L 🗹 38: 53 m 💓 admin	16	17	18 19		690 -	Awaiting P Closed Wo		🕿 My C	Calls	\$	Q 10
Deportunities Fund	nel Chart 🛛 🏶 🔞					Hover over a v	wedge for details.		Creat	te	Page 1 2	2 3
Pipeline tota	l is \$5,450.00K	23	24	25 26	Shows cumu	lative opportunity amou	nts by selected lead sourc	for selected	Close	e Subject	Start D	Date
	280 Qualification	•	-	9-11 💽 11-13		u	sers.		0 ×	West Coast Conf Call	Friday	y, 12:30
840 - 585	Needs Analysis	Explore sal Replaceme		Kickoff Meeting			Last ru	n: 7 minutes ago	0 ×	Left a message	2018-00:00	-01-31
625-660	Id. Decision Makers	Windows		West Coast Conf	H My Quote			* Q & B	0 ×	Left a message		-03-09
620-380	Perception Analysis Proposal/Price Quote			Call		35			0 14		09:30	
505 - 345	Negotiation/Review	30	31	1 2	Create		Page *	2 3 ¥	0 ×	Get More information	on 2018 10:45	-03-11
610	Awaiting Paperwork Closed Won	Eft a mess	0-0:30		Quote #	Shipping Account	Amount Valid Until	Stage	0 ×	the proposed deal Discuss Review Proce		-03-13
Hover over a v	wedge for details.	Lent a mess	age		2018-41	C Nelson Inc 2	\$ 1,249.38 2017-05-03	DELIVERED		Discuss Review Proce	12:45	
Shows cumulative o	opportunity amounts by				2018-40	EEE Endowments	\$ 1,695.00 2018-11-10	ON HOLD				
selected lead sour	ce for selected users.	ils		¢, 0, 0, 0′		LTD 2			Macwo			\$
	Last run: 53 minutes ago			Page 1 2 3 ≽	2018-39	Gifted Holdings	\$3,168.54 2018-10-10	DRAFT	iOS 11.3: F Animoji, a	Power management, bette ind more	r AR, new	⊘vi
My Quotes	\$ Q (U) Z	Cont	act	Date 💠	2018-38	C JBC Banking Inc	\$ 4,682.24 2018-12-25	DRAFT		If you turn off iCloud Pho may unintentionally delete		⊘ vi
Create	Page 1 2 3 ¥	A 11A	delaide Charette	2018-01-05,		2			images	hay unintentionally delete	optimized	© VI
Quote # Shipping Account		A 19	lana Newby	16:00 2017-12-27, 16:00	2018-37	MTM Investment Bank F S B 2	\$ 2,173.94 2018-01-10	DELIVERED		omePod will beat Amazon ome (and 5 ways it won't)		⊘ vi
2017-44 C RIVI HOT	IERA \$ 1,320.42 05/	AI C	reg Sund	2017-12-17,	Casac bu	Status by User		* 13		r Pro 1.0 Whirlwind review e alternative for pro Photo		₫V
2017-38 Concernant		AD E	dmond Solari	16:00 2017-12-16,	e cases by			¥r (o		130 Pro review: A Super N controller for the PC	intendo-	øv
	e LP			16:00		Cases by Status	by User - Total: 20		inspired c	controller for the PC		
2 3 2017–40 🗁 Whi	ite Cross \$ 8,076.74 19/											
0 2017-40 🗁 Whi Co 2											5-00444	

Background

One of the more important integrations for 1CRM is to integrate it to an accounting system. While many clients use the Sales and Purchase modules in 1CRM to accumulate Invoices, Purchase Orders, and Payments both in and out - then send summaries of those transactions to their accountant for posting - not everyone wants to follow this modern day version of shoebox accounting!

Those clients wanting essentially real time integration with an accounting system from their Salesrelated modules in 1CRM will be interested in what this guide has to say.

Integromat is one of the world leaders in acting as an integration switchboard between different SaaS (Software as a Service, web-based) systems. We have built integrations with Integromat, and so have a number of Accounting systems.

Initially we have tested our integrations with two leading systems - QuickBooks Online and Xero, and we document here how you setup the Integromat integration with each of them. Our integration provides you with a 2-way synchronization between 1CRM and the accounting system of these items:

- Quotes
- Invoices
- Incoming Payments
- Accounts

If you're excited to get these kinds of capabilities working for your organization, keep reading, or just <u>drop us a line</u> and we'll demonstrate what it can do for you!

Version 1.2, February, 2021. This document is subject to change without notice.

Disclaimer

While every effort has been made to ensure the accuracy and completeness of information included in this document, no guarantee is given, or responsibility taken by 1CRM Systems Corp. for errors and omissions.

Copyright © 2004-2021 1CRM Systems Corp. 688 Falkland Road Victoria, British Columbia Canada V8S 4L5

www.1crm.com

1CRM, Lead Guerrilla and Customer Connection are trademarks of 1CRM Systems Corp

1CRM & Integromat

Bac	kground	2
1.0	Connecting to Integromat	4
	1.1 Creating a connection between 1CRM and Integromat	4
	1.2 Configuring the Integromat Timezone	4
2.0	Integrating with Xero	5
	2.1 Syncing accounts from 1CRM to Xero	5
	2.2 Syncing accounts from Xero to 1CRM	11
	2.3 Syncing Invoices from 1CRM to Xero	16
	2.4 Syncing Invoices from Xero to 1CRM	
	2.5 Syncing Quotes from 1CRM to Xero	26
	2.6 Syncing Payments from 1CRM to Xero	27
	2.7 Syncing Payments from Xero to 1CRM	
3.0	Integrating with Quickbooks	35
	3.1 Syncing accounts from 1CRM to Quickbooks	35
	3.2 Syncing accounts from Quickbooks to 1CRM	41
	3.3 Syncing Invoices from 1CRM to Quickbooks	
	3.4 Syncing Invoices from Quickbooks to 1CRM	53
	3.5 Syncing Quotes between 1CRM and Quickbooks Online	59
	3.6 Syncing Payments from 1CRM to Quickbooks Online	60
	3.7 Syncing Payments from Quickbooks to 1CRM	65

1.0 Connecting to Integromat

1.1 Creating a connection between 1CRM and Integromat

1. When creating a Scenario within Integromat, you will be able to add a Webhook for 1CRM. Within the Webhook, you can add a Connection for 1CRM:

Create a connection ?	× _
Connection name	
My 1CRM connection	Add a hook ? ×
Domain	Webhook name
	My New Event webhook
A Field 'Domain' is not filled.	Connection
For example 'mycompany.1crmcloud.com' for address http://mycompany.1crmcloud.com.	My 1CRM connection DEV (admin) 🗘 Add
Username	For more information on how to create a connection to 1CRM, see the online Help.
hscholtz40@gmail.com	Туре
Password	•
	Module C
	+
Cancel Continu	
Show advanced settings Cancel O	K Cancel Save

- 2. The domain name will be your 1CRM instance URL (e.g. https://demo.1crmcloud.com)
- 3. Enter the username and password for an administrative user and click Continue.
- 4. Once you have set up the connection, it can be used with any Scenario.
- 5. For all new records created in 1CRM by this Integromat integration, an Assigned ID is required. This may be set to 1 to specify the 1CRM system administrator, or the ID of any other 1CRM user may be used as the default *Assigned To* user for new records.

1.2 Configuring the Integromat Timezone

- 1. To ensure that date and time fields match across applications, we need to set the Integromat Timezone to GMT+0.
- 2. Login to Integromat and go to your profile.
- 3. Click on Timezone options.
- 4. Select the second timezone option (Scenarios), and set the timezone to the GMT+0 timezone.

2.0 Integrating with Xero

2.1 Syncing accounts from 1CRM to Xero

- 1. Login to your Integromat account and create a new Scenario.
- 2. Search and select 1CRM as the service to integrate and continue:

N	What services do you want to integrate? Vou can change this later.
	Q territ
1 CRM	

3. Click on the 1CRM app and select New Event

\bigcirc	1CRM
Š	+ Add another module
	Search

4. A webhooks selection will appear, click on Add:

Webhook		
	\$ Ŧ	Add

- 5. Name the webhook and add a connection if you have not already done so, name your connection and enter the Domain as your 1CRM URL (eg. mycompany.1crmcloud.com)
- 6. Enter the Admin username and password for your 1CRM instance.
- 7. Click Continue and ensure that the correct connection is selected.
- 8. Select "create or update" as the Webhook Type.
- 9. Select "Account" as the Module and save the Webhook.
- 10. The newly created Webhook will now be available to select.



- 11. Select the webhook and click OK.
- 12. Add another module to the scenario:



13. Search and select the Xero module, then search and select Search for Contacts:



- 14. Select your connected Xero account Or connect your Xero account if you have not already done so.
- 15. Select "field" as the Search By option.
- 16. Select "Name" as the filter, select Name as the filter value and set the limit to 1:

Search by	map:	
field		\$
Filter		
Name	\$	×
Equals	\$	
1. Name		
Add AND rule		
Maximum number of returned accounts		
1		

- 17. Add another module as in step 12, and search for Flow Control, then select Router within the Flow Control module.
- 18. The router will be added with two blank modules linked to it. These modules will be used to Create and Update accounts. If you choose to only Create or Update accounts, you can remove one of the blank modules and only follow the steps required to Create or Update accounts.
- 19. Set up a filter for New Accounts only by clicking on the settings icon:



20. Create the condition as shown below:

Set up a filter 🛛 🕄 🗙 🛠
Label
New Accounts
The fallback route. It will be used in the case where a bundle cannot continue on from the router via any other route. For more information, please see the online Help. Condition
2. Contact ID X
Does not exist 🔶
Add AND rule Add OR rule
Сапсе

21. Click OK and select the empty module after the filter, select Xero:

	1CRM
8-	Xero Add another module
New Accounts	Search

- 22. Now select the Create a Contact action.
- 23. If you have not set up a Xero Connection, you can do so now by adding a connection.
- 24. You can now map the fields from 1CRM to the Xero Contact:

☆ ◎ X ¹ A 🗎 🖽 Ø [*] ? ×	Xero 🕱 ? ×
Attachments[]	V For more information on how to create a connection to Xero, see the online Help.
1CRM 1 - New Event	Organization 🖉 map:
ID Date Created	1CRM Corp. +
Last Modified	Name
Modified by ID (modified user)	
Assigned to	Field 'Name' is not filled.
ID (assigned_user) Created by	Contact number
ID (created_by_user) Deleted	
Currency	Used to identify contacts in external systems.
ID (currency) Exchange fate	Account number
Name	
Default Price Book ID (default_pricebook)	First name
Member of ID (member of)	First name
Type	· / /
Industry	Last name
Annual Revenue	
phone_fax_raw	Email
Billing Address Street Billing Address City	

- 25. Once all fields are mapped, click OK.
- 26. Set up the filter to allow the system to Update accounts that already exist in Xero by adding a filter to the remaining blank module.
- 27. Configure the filter as shown below (the second condition is only required if you will be using a two-way integration (from 1CRM to Xero as well as from Xero to 1CRM):

Set up a filter	X ? ×
Label	
Update Accounts	
The fallback route. It will be used in the bundle cannot continue on from the other route. For more information, p online Help. Condition	router via any
2. Contact ID	×
Exists	÷
and	
1. Last Modified	×
Later than	¢
2. Updated date	
Add AND rule Add OR rule	
	Cancel

- 28. Click on the remaining blank module and select Xero, then Update a Contact.
- 29. Select the Contact ID from the Search for Contacts module:

Bundle order position	
Contact ID	
Contact state	
Name	
First name	
Last name	
Email address	
Skype user name	
Bank account details	
Tax number	Xero 😸 ? ×
Accounts receivable tax type	
Accounts payable tax type	Connection
Addresses []	Connection
Phones[]	My Xero connection + Add
Updated date	
Contact groups[]	9 For more information on how to create a connection to Xero, see the online Help.
Is supplier	
Is customer	Organization @ map:
Default currency	1CRM Corp. +
Discount	
Website Branding theme	Contact ID
Branding theme ID	
Name	
Purchases default account code	▲ Field 'Contact ID' is not filled.
Sales default account code	
Sales tracking categories[] 🔻	Name
Purchases tracking categories[]	
Batch payments	
Bank account number	
Bank account name	Show advanced settings Cancel OK
Details	
Code	

- 30. You can now map the fields you would like to update in Xero from 1CRM. (Click on "Show advanced settings" to display all available fields for Xero.
- 31. Once all the fields are mapped, click OK.
- 32. Add an error handler to the Search for Contacts module by right clicking on the module:



- 33. Select Ignore as the Directive.
- 34. Save and Enable the scenario:



35. The setup is now complete, and accounts will be created and updated from 1CRM to Xero.

2.2 Syncing accounts from Xero to 1CRM

- 1. Login to your Integromat account and create a new Scenario.
- 2. Search and select Xero as the service to integrate and continue:



3. Click on the 1CRM app and select New Event

N O	ର	Xero
	e de la companya de l	+ Add another module Search

4. Select Watch Contacts:

	Create a Bank Transfer Transfers a specified amount from one account to another.	
-	Watch Contacts CONTACTS Triggers when a contact is created or updated.	
S)	Search for Contacts Searches for a contact by name or email.	
	Get a Contact Retrieves contact information by ID.	
	Create a Contact Creates a new contact.	
	Update a Contact Updates a contact by ID.	

- 5. Select your connected Xero account or connect a new account.
- 6. Select your Organization.
- 7. Select from when the sync should start:

	Choose where to start	?
	 From now on Since specific date All Choose manually 	
Vara		ОК
Xero 1 Watch Contacts		

8. Add another module to the scenario:



9. Search and select the 1CRM module, then search and select Search for Records:

	RECORDS
	Search for Records Searches for records.
	Get a Record Returns details about a selected record.
	Create a Record Creates a record.
	Update a Record Updates a record.
	Delete a Record Removes a record.
ଚ	Add Related Records Adds a list of related records belonging to the specified model and id.
8	OTHER
	List Modules Returns all modules.
	List Fields Returns all fields for a selected module.
	Get My Info Returns information about the authenticated user.
	Upload a File Uploads a file.
	Make an API Call Performs an arbitrary authorized API call.
	🔄 search

10. Select Accounts as the Module.

11. Map the Name field from Xero to the Filter text field:

Noro I Hater contacto	see the online Help.	
Contact ID Contact status	Module	¢
Name	Account	÷
First nive Last name	Fields	c) map:
Email addres.	annual_revenue	*
Skype user name Bank account detal s	□ assigned_user	
Tax number	□ assigned_user_id	
Accounts receivable tax type Accounts payable tax type	balance	
Addresses[]	□ balance_payable	
Phones []	billing_address_city	
Opdated date Contact groups[] Is suppliet Is customer Default currency Discount Website	 Array of field names to fetch. When omitted, a of fields are returned, depending on model. Re guaranteed to be returned, and for most mode display name fields. Arr text 	cord ID is
Branding theme ID	Generic search string. Fields involved in search model.	depend on

- 12. Click OK and add another module.
- 13. Search and select Flow Control, then select Router.
- 14. Two new modules will flow from the Router.
- 15. Click on the first module and select 1CRM.
- 16. Select Create a Record.
- 17. Select your connected 1CRM account and choose Account as the module.
- 18. Map all the fields as required.
- 19. Click OK and select the second blank module, again selecting 1CRM.
- 20. Select Update a Record.
- 21. Select your connected 1CRM account and choose Account as the module.
- 22. Map the 1CRM ID to the Record ID field:



- 23. Map the rest of the fields as required for the update.
- 24. Set up a filter between the two 1CRM Create module and the Router.



25. Label the filter "New Accounts" and map the 1CRM ID field to the Condition, then set the operator to Exists:



- 26. Click OK and add another filter, this time between the 1CRM Update module and the Router.
- 27. Label the filter "Update Accounts" and map the 1CRM ID field to the Condition, then set the operator to Exists:

ID Date veated Last Mon fied Modified by ID (modified_ver) Assigned to	et up a filter
ID (assigned_user) Created by	bel
ID (created_by_user) Deleted	Update Accounts
Currency ID (currency) Exchange Rate Name Default Frice Book	The fallback route. It will be used in the case where a bundle cannot continue on from the router via any other route. For more information, please see the online Help.
ID (default_pricebook)	undition
Member of ID (member_of)	2. ID ×
Type Industry	Exists 🗢
Annual Revenue	Add AND rule Add OR rule
Fax phone_faxraw	
Billing Address Street Billing Address City	

28. Add an "AND" rule and configure it as follows. The Updated date from Xero must be later than the Last Modified date from 1CRM to avoid a 2-way sync causing an infinite looping sequence in the synchronization:

2. ID	
Exists	\$
and	
1. Updated date	
Later than	÷
2. Last Modified	

- 29. Click OK.
- 30. Save and Enable the scenario:



31. The setup is now complete, and accounts will be created and updated from Xero to 1CRM.

2.3 Syncing Invoices from 1CRM to Xero

- 1. Login to your Integromat account and create a new Scenario.
- 2. Search and select 1CRM as the service to integrate and continue:

W	/hat services do you want to integrate? vou can change this late.
	Q, terri
1CRM	

3. Click on the 1CRM app and select New Event

ଚ	1CRM + Add another module
P°	Search

4. A webhooks selection will appear, click on Add:

Webhook		
\$	*	Add

- 5. Name the webhook and add a connection if you have not already done so, name your connection and enter the Domain as your 1CRM URL (eg. mycompany.1crmcloud.com)
- 6. Enter the Admin username and password for your 1CRM instance.
- 7. Click Continue and ensure that the correct connection is selected.
- 8. Select "create" as the Webhook Type.
- 9. Select "Invoice" as the Module and save the Webhook.
- 10. Select the newly created webhook and click OK.
- 11. Add a new Module and search and select the Xero module, then search and select Search for Contacts:



- 12. Select your connected Xero account Or connect your Xero account if you have not already done so.
- 13. Select "field" as the Search By option.
- 14. Select "Name" as the filter, select Billing Account as the filter value and set the limit to 1:Search for the Flow Control module and select Iterator.

Se	arch by	map:			
	field				
Fil	ter				
L	Name	¢	×		
L	Equals	\$			
L	1. Billing Account				
	Add AND rule				
м	aximum number of returned accounts				
	1				
_					

- 15. Add another module.
- 16. Search for the Flow Control module and select Iterator.
- 17. Click OK leaving the Array field empty
- 18. Add a new module to the Iterator and again search for Flow Control, then selecting Array aggregator.
- 19. Select Iterator as the source module and click OK.
- 20. Add another module and select Xero.
- 21. Select the "Create an Invoice" option:



- 22. Select "A sales invoice" as the type.
- 23. Map the Contact ID field to the Contact ID retrieved from the Search for Contacts module:

Xero 4 - Search for Contacts		
Aero 4 - Search for Contacts		
Total number of bundles		
Bundle order position		Xero 🕺 ? ×
Contact status		Connection
Name First name		My Xero connection + Add
Last name Email address		For more information on how to create a connection to Xero, see the online Help.
Skype user name Bank account details		Organization 🕫 map:
Tax number Accounts receivable tax type		1CRM Corp. +
Accounts payable tax type		Type map:
Addresses[]	\mathbf{N}	A sales invoice - commonly known as an Accol 🕈
Updated date		antact ID
Is supplier		Search
Is customer		Scale
Default currency Discount		Line items map:
Website		O Add item
Branding theme		
Branding theme ID		
Purchases default account code		Show advanced settings Cancel OK
Sales default account code		
Sales tracking categories[]		
Purchases tracking categories[]		
Batch payments		

- 24. Click OK (We will return to this module to map the fields).
- 25. Right click on the 1CRM New Event module and click on "Run this module only" create a test invoice in 1CRM.
- 26. Once the invoice is received, the module will become green:



27. Now click on the Iterator module and select line_items[] as the Array:

Flow Co	ntrol	× ?	×	Subtotal 380 Pre-Tax Amount 380
				Pre-Tax Amount 380
Array		map:		Terms COD
		_		Tax Information
	ine_items[]			Show Assembly Components all
				Tax Exempt 0
				Apply Taxes Before Discounts (QB) 0
		Cancel	ОК	Marketing Event
				ID (event)
				Use Price Book
				ID (pricebook) LBL PAYMENT PROCESSOR
	\ \			ID (payment processor)
				LBL PP INVOICE ID
		\		WooCommerce ID
				billing contact.first name
				billing_contact.last_name
4:15 PM The	request was accepted. Waiting for	data.		billing_contact.salutation
4:15 PM The :	scenario was initiated.			shipping_contact.first_name
4:15 PM The :	scenario was finalized.			shipping_contact.last_name
4:15 PM The :	scenario run was completed.			shipping_contact.salutation
bg				line_items[]

- 28. Click OK and enter the Array aggregator module.
- 29. Select Line Items as the Target structure type.
- 30. You can now map the line item fields from the Iterator module. Some fields can be obtained from the Search Contacts module like the Account code and Tax Code:

Array aggregator	×	?	×
Description 2. Mfr. Fart No. , 2. Line Item Description			^
Quantity			
Unit amount 2. Unit Frice			
ltem	map:	÷	=
Account code	map:		
Tax code	map:		
Tax amount			
Line amount			
Discount rate			~

31. Once all line item fields are mapped, return to the Xero - Create an Invoice module.

32. At the Line Items field, enable "map" and map this to the Array[] field as shown below:

	my nero connection	100
Bank account name Details Code	For more information on how to creat the online Help.	te a connection to Xero, see
Reference	Organization	🔿 map:
Payment terms	1CRM Corp.	÷
Sales Contact persons[]	Туре	map:
Has attachments	A sales invoice - commonly k	nown as an Accol 🗢
Attachments[]	6 ID	
Flow Control 14 - Array aggregator	Contact ID	Search
Array[]		
1CRM 1 - New Event	Line items	map:
1D 726332a5-53e9-2cf6-7ee6-5f466e6589b6	14. Array[]	
Date Created August 26, 2020 2:15 PM		
Last Modified August 26, 2020 2:15 PM		
Modified by admin	Show advanced settings	Cancel OK

- 33. Click on Show advanced settings to display all available Xero field and map them as required.
- 34. Once all the fields are mapped, add a filter to only allow invoices to be created if a Contact ID is present. Click on the settings icon between Search for Contacts and Create an Invoice:



35. Set up the filter as shown below:



- 36. Add another module after the Create an Invoice module from Xero.
- 37. Select 1CRM, then Update a Record.
- 38. Select Invoice as the Module, then map the ID field from the original 1CRM invoice to the Record ID field and map the Xero Invoice ID field to the Integrated ID field:

1CRM & Integromat



39. Click OK and Save and Enable the scenario:



40. The setup is now complete, and invoices will be created from 1CRM to Xero.

2.4 Syncing Invoices from Xero to 1CRM

- 1. Login to your Integromat account and create a new Scenario.
- 2. Search and select Xero as the service to integrate and continue:

Ü		Skip	Continue >
	What services do you want to integrate?		
	Q, xer		
Xero			

- 3. Click on Xero and select the "Watch Invoices" trigger.
- 4. Select or add your Xero connection and select the appropriate Organization.
- 5. Select the start as required.
- 6. Search for the Flow Control module and select Iterator.
- 7. Click OK leaving the Array field empty
- 8. Add a new module to the Iterator and again search for Flow Control, then selecting Array aggregator.
- 9. Select Iterator as the source module and click OK.
- 10. Add a new module and search and select 1CRM.
- 11. Select Search for Records.
- 12. Select your 1CRM connection and select the Accounts module.
- 13. Map the Xero Contact Name field to the Filter text field:

Filt	er text	
	1. Contact: Name	
Q	Generic search string. Fields involved in search depend on model.	

- 14. Scroll to the bottom and limit the query to 1 and click OK.
- 15. Add a new module and select 1CRM, then select Create a Record.
- 16. Select your 1CRM connection and select Invoice as the Module.
- 17. Map the Invoice field in the 1CRM module, leaving the Line items field blank for now, we will return to map the Line items.
- 18. Map the Xero Invoice ID field to the Integrated Field in 1CRM:

	lax Exempt	map:	Xero 1 - Watch Invoices
			Acto Water Invoices
	Apply Taxes Before Discounts (QB)		Type ACCREC
	Apply laxes before Discounts (QB)		Invoice ID fc8cd936-a4e0-4fd8-b6da-6170d962c288
		Raw: InvoiceID	Invoice Number INV-0026
	Marketing Event (event_id)		Reference TEST
			Ambuild due
			Amount paid 14950
	Use Price Book (pricebook_id)		Sent to contact
			Currency rate
			Is discounted false
			Has attachments false
	Integrated ID		Has Errors
	1. Invoice ID		Contact
1			Contact ID 6b8c30e3-faed-4881-8110-02fbade89
	LBL_PAYMENT_PROCESSOR (payment_	processor_id)	Contact status
			Name Harold Scholtz
			First name
			Last name
	LBL_PP_INVOICE_ID		Email address
			Slame user pare

- 19. Right click on the Xero Watch Invoices module and click on "Run this module only" create a test invoice in Xero.
- 20. Once the invoice is received, the module will become green:



21. Now click on the Iterator module and select Line Items as the Array:



- 22. Click OK and enter the Array aggregator module.
- 23. Select Line Items as the Target structure type.
- 24. You can now map the line item fields from the Iterator module:

				3	습	۲	Xı	A		≡	Ø	?	×
	Source Module			ŀ	Flov	/ Cont	rol 🤋	- Ite	rator				_
	Iterator [9]		4	•	_	al nu dle o							
	Please select the module whose output you wish	to age	gregati	е.	_	em cod script							
	Target structure type		/	1	Uni	it amo	unt	500					
	Line Items	/		•		type amou							
	Line Items				Lir	e amo count	unt	10000					
	Line Item Description				Tra	cking	0	200					
	9. Description				_	untity me ite		87349	9dd5-c4	440-45	c6-84b9-	01b 1543	s
	Qty.			ľ	Xerc	1 -	Wate	h Invo	nices				
	9. Quantity		_		Ту	e AC	CREC						
	Mfr. Part No.		_	l		roice roice					o6da-617	0d962c2	81
	9. Item code				Rei	erenc	e TE	ST					
ega			_			ount d							1
	Unit Price		_	h	_	t to rency							
	9. Unit amount		_	J	Is	disco	unted	false	e alse				
	Line Item Tax Percentage				_	s atta s Erro		CB IS	115C				
			_		_	itact Contac	t ID	6b8c3	30e3-fa	ied-488	31-8110-0	02fbade	19.
	Line Item Tax Amount					Contac Name	t sta Harold						
	9. Tax amount					irst?		Schol	2				
	Line Item Discount Percentage					ast n Cmail		33					
		_				Skype Sank s			nila				

25. Once all line item fields are mapped, return to the 1CRM - Create a Record module.

26. Map the array created to the Line Items field:

	ID (customer_level)	see the online Help.	
	LBL_PAYMENT_PROCESSOR_LIST	Module	-
	ID (payment_processor)		
	External Customer ID	Invoice	÷
	WooCommerce ID		
_	woo_locked	Line Items mi	sp:
	Favorite	12. Array[]	
	Flow Control 12 - Array aggregator	> Must contain at least 1 item(s).	
•• (Array[]	Total Tax	
×	Xero 1 - Watch Invoices		
	Type ACCREC		
	Invoice ID fc8cd936-a4e0-4fd8-b6da-6170d962c28	Total Discount	
	Invoice Number INV-0026		

- 27. Once all the fields are mapped, add a filter to only allow invoices to be created if a Account ID is present. Click on the settings icon between Search for records and Create a Record.
- 28. Set up the filter as shown below:

Se	et up a filter	8 ?	×
La	bel		
Co	4. ID		×
	Exists	¢	
	Add AND rule Add OR rule		
		Cancel	ок

29. Right click on the 1CRM Search for Records module and click on Add error handler, then select the Ignore option.

30. Save and Enable the scenario:



31. The setup is now complete, and invoices will be created from Xero to 1CRM.

2.5 Syncing Quotes from 1CRM to Xero

1. The same process for syncing Invoices from 1CRM to Xero can be followed to sync Quotes from 1CRM to Xero, however Integrated ID is not required for this integration. So the final step to update the Quote in 1CRM is not required and of course be sure to select the Quote module instead of the Invoice module where applicable.

2.6 Syncing Payments from 1CRM to Xero

- 1. Login to your Integromat account and create a new Scenario.
- 2. Search and Select 1CRM as the service to integrate and continue.

	What services do you want to integrate?	
	Q, term	
1 CRM		

3. Click on the 1CRM app and select New Event

	1CRM
B	+ Add another module Search

4. A webhooks selection will appear, click on Add:

Webhook		
	\$ *	Add

- 5. Name the webhook and add a connection if you have not already done so, name your connection and enter the Domain as your 1CRM URL (eg. mycompany.1crmcloud.com)
- 6. Enter the Admin username and password for your 1CRM instance.
- 7. Click Continue and ensure that the correct connection is selected.
- 8. Select "create" as the Webhook Type.
- 9. Select "Payment" as the Module and save the Webhook.
- 10. The newly created Webhook will now be available to select.

	1CRM		×	?	×
	Webhook				
	Payments	\$	-	Ad	ld
	We read your mind, we attached	uns webhook to	I CRIVI		
CRM	automatically for you. Show address Image: Comparison of the online Help.	to create a webho	ok in 1	CRM,	see

11. Add another module to the scenario:

	+ Add another module
1CRM 1 New Event	

12. Search and select the Xero module, then search and select Search for Contacts:



- 13. Select your connected Xero account Or connect your Xero account if you have not already done so.
- 14. Select "field" as the Search By option.
- 15. Select "Display Name" as the filter, select Account as the filter value and set the limit to 1:

	ID (modified_user) Payment Currency	arch by	map:	
	ID (currency) Exchange Rate	field	4	•
	Received/Sent Amount Received/Sent Amount	ter		
¢	Total Allocated	Name	\$	×
	Payment Date	Equals	÷	
	Payment Number Prefix Payment ID	1. Account		
	Payment Number Customer Reference No.	Add AND rule		
	Notes	aximum number of returned accounts		
	Payment Method Payment Type	1		
	Refund			
	ID (account)	Can	cel	К

- 16. Add another module, again selecting Xero.
- 17. Select Create a Payment.
- 18. Map the fields as required, keeping in mind that in order to link an invoice to the Payment, "specify object by" need to be Invoice ID.
- 19. When Invoice ID is selected, map the "related_invoices->integrated_id" field to the Invoice ID field:

	see the online Help.	
	Organization	¢ map:
	1CRM Corp.	\$
	Specify object by	map:
	Invoice ID	\$
	Invoice ID	
	<pre>1. related_invoices[1]: integrat</pre>	ed_id
	Account	🥏 map:
xero	Owner A Drawings	\$
	This account needs to be either an account have enable payments to this account swite	
	Amount	
Xero 5	1. Total Allocated	
Create a Payment	Date	
	1. Payment Date	
	 Time zone: Africa/Johannesburg For more information about supported dat online Help. 	e formats, see the
	Reference	
	1. Customer Reference No.	
s accepted. Waiting for data.	ls reconciled	map:
as initiated.	🔵 Yes 🔵 No 🧿 Not defined	

Note: Xero only accepts one invoice per payment. Make sure you only allocate a single invoice to each payment in 1CRM in order for Xero and 1CRM to match correctly.



20. Add an error handler to the Search for Contacts module by right clicking on the module:

- 21. Select Ignore as the Directive.
- 22. Save and Enable the scenario:



23. The setup is now complete, and Payments will be created from 1CRM to Xero.

2.7 Syncing Payments from Xero to 1CRM

- 1. Login to your Integromat account and create a new Scenario.
- 2. Search and Select Xero as the service to integrate and continue.



3. Click on the Xero app and select Watch Payments

	Returns a list of items.	
	Create an Item Creates a new item.	
	Update an Item Updates an item by ID.	
0	Get an Item Searches for an item by item ID or item code.	
$\langle \rangle$	PAYMENTS	
	Watch Payments	
0	Triggers when a payment is created or updated.	
Bo	Xero	
B o	Triggers when a payment is created or updated. Get a Payment Retrieves information about a payment with a	

- 4. Select your connected Xero account and Organization.
- 5. Choose when the sync should start:

	Choose where to start	?
xero	 From now on Since specific date All Choose manually 	
		ОК
Xero 1		
Watch Payments		

6. Add another module to the scenario:



7. Search and select the 1CRM module, then search and select Search for Records:

	RECORE	DS
		Search for Records Searches for records.
		Get a Record Returns details about a selected record.
		Create a Record Creates a record.
		Update a Record Updates a record.
		Delete a Record Removes a record.
ଚ	CRM	Add Related Records Adds a list of related records belonging to the specified model and id.
B	OTHER	
		List Modules Returns all modules.
		List Fields Returns all fields for a selected module.
	1	Get My Info Returns information about the authenticated user.
	18	Upload a File

- 8. Select your connected 1CRM account Or connect your 1CRM account if you have not already done so.
- 9. Select Account as the module.
- 10. Map the Contact Name from the Xero fields to the Filter text field:

C 🛆 🔒 integr	omat.com/scenario/additcon	1pany=543224						* 0 🖬 🔏 *	4 * 2 0 *
(E) Interror	ation Xero, 1CRM						A 18 18 (* - ? :	1CRM	
U naga	ADDRI MERO, TCRIM					Payment TD Date		Connection	
						Bonk enount		My 1CRM connection DEV (ad	dmin) + Add
						Seleconce Outrenty rate		For more information on how to creat see the online Hop.	te a connection to 1GRM,
						Payment type Statup		Module	5
						Updated date		Account	•
						Tex excount Te revisionitant		Fields	ø nv
						Account 10		account_popup	A
						5942		C account_popups	
					Xero			account_type	
						Twee		annual revenue	
						Invoice 1D		assigned_user	
						Involute mate	2	assigned_user_id	*
					Xero 1 Watch Payments	Jactorenane Jacrese, due Jacrese, psice Sent to ours		Array of field names to fetch. When or of fields are retained, depending on in guarantized to be retained, and for m display name fields.	model. Record ID is
						Caracancy and		Filter test	
						Contact			
						Contact ID Contact st Ress	3.03	Ceretic search string. Fields involved i model.	in search depend on
						TARMA DARK		Sort order	¢ ne
						East name Email addr			•
D Ru	n once					Date string		Only Describes	110
						Scanding the	- 10	Yes No O Not defined	
017	0 8 8	0 %	÷ 0	🔿 🔀 🖬	- 18 +	Teares			
SCHEDULING	CONTROLS			10015	64/CRITES	Eine anount : Sinc Steps II		Show advanced settings	Carroel OK

- 11. Add another module, again selecting 1CRM.
- 12. Select Create a Record
- 13. Select your connected 1CRM account and select Payment as the Module.
- 14. Map the fields as required, keeping in mind that in order to link an invoice to the Payment, you will need to add a records to the Related Invoices field:

	Allocated Rate
TΣ	Effective Rate
CRM	Processor Conversion Rate
1000	Currency Converted map:
Create a Record	Yes No O Not defined LBL_PAYMENT_PROCESSOR_LIST (payment_processor_id)
	LBL_PP_CUSTOMER_ID
	Image: Provider's unique transaction id
	Related invoices map:

15. Map the Invoice ID and Amount field from Xero to the Related Record:

Add item	×	BL_PP_CUSTOMER_ID	
Invoice ID			
1. Invoice: Invoice ID		Payment provider's unique transaction id	
Amount		elated invoices	map:
1. Amount		O Add item	

16. Add an error handler to the Search for Records module by right clicking on the module:



- 17. Select Ignore as the Directive.
- 18. Save and Enable the scenario:



19. The setup is now complete, and Payments will be created from Xero to 1CRM.

3.0 Integrating with Quickbooks

3.1 Syncing accounts from 1CRM to Quickbooks

- 1. Login to your Integromat account and create a new Scenario.
- 2. Search and select 1CRM as the service to integrate and continue:

	What services do you want to integrate?	
	Q tan	
1 CRM		

3. Click on the 1CRM app and select New Event

ର	
6	+ Add another module Search

4. A webhooks selection will appear, click on Add:

Webhook			
	÷	*	Add

- 5. Name the webhook and add a connection if you have not already done so, name your connection and enter the Domain as your 1CRM URL (eg. mycompany.1crmcloud.com)
- 6. Enter the Admin username and password for your 1CRM instance.
- 7. Click Continue and ensure that the correct connection is selected.
- 8. Select "create or update" as the Webhook Type.
- 9. Select "Account" as the Module and save the Webhook.
- 10. The newly created Webhook will now be available to select.



- 11. Select the webhook and click OK.
- 12. Add another module to the scenario:



13. Search and select the Quickbooks module, then search and select Search for Customers:



- 14. Select your connected Quickbooks account Or connect your Quickbooks account if you have not already done so.
- 15. Select "field" as the Search By option.
- 16. Select "Display Name" as the filter, select Name as the filter value and set the limit to 1:
| Sea | arch by | nap: | |
|------|--|--------|-----|
| f | ield | | \$ |
| Filt | er | | |
| | Display name | \$ | × |
| | Equals | ¢ | |
| | 1. Name | | |
| | Add AND rule | | |
| Lin | nit | | |
| 1 | | | |
| 0 | The maximum number of results to be worked with du
execution cycle. | ring a | ine |
| | Cano | el | ОК |

- 17. Add another module as in step 12, and search for Flow Control, then select Router within the Flow Control module.
- 18. The router will be added with two blank modules linked to it. These modules will be used to Create and Update accounts. If you choose to only Create or Update accounts, you can remove one of the blank modules and only follow the steps required to Create or Update accounts.



19. Set up a filter for New Accounts only by clicking on the settings icon:

20. Create the condition as shown below:

Set up a filter	×	?	×
Label			
New Accounts Only			
The fallback route. It will be used in the ca bundle cannot continue on from the route other route. For more information, please online Help. Condition	er via	any	3
5. Customer ID			×
Does not exist		\$	
Add AND rule Add OR rule			
	Cance	1	ок

21. Click OK and select the empty module after the filter, select Quickbooks:



- 22. Now select the Create a Customer action.
- 23. If you have not set up a Quickbooks Connection, you can do so now by adding a connection.
- 24. You can now map the fields from 1CRM to the Quickbooks Customer:

☆ ॐ X ⁴ A 菌 目 (* ? >	× QuickBooks 🔀 ? ×
Sync token Suffix	Connection
Company name	My quickbooks connection (qb2@skol + Add
Family name Print on check name	For more information on how to create a connection to QuickBooks, see the online Help.
1CRM 1 - New Event	Display name
ID Date Created	
Last Modified Modified by ID (modified_user) Assigned to ID (assigned_user) Created by	The name of the person or organization as displayed. Must be unique across all Customer, Vendor, and Employee objects. Cannot be removed with sparse update. If not supplied, the system generates Display name by concatenating customer name components supplied in the request from the following list: Title, Given name, Middle name, Family name, and Suffix.
ID (created_by_user) Deleted	Given name
Currency ID (currency Exchange date Name	Middle name
Default Price Book ID (default_pricebook)	Family name
Member of	
ID (member_of) Type	Title

- 25. Once all fields are mapped, click OK.
- 26. Set up the filter to allow the system to Update accounts that already exist in Quickbooks by adding a filter to the remaining blank module.
- 27. Configure the filter as shown below:

	Condition	
	5. Customer ID	×
5	Exists 🗢	
l	and	
	5. Meta data: Last updated time	×
	Later than 🗘	
	1. Last Modified	
	Add AND rule Add OR rule	

- 28. Click on the remaining blank module and select Quickbooks, then Update a Customer.
- 29. Select the Customer ID from the Search for Customers module:

QuickBooks 5 - Search for Customers	Connection
Total number of bundles Bundle order position	My quickbooks connection (qb2@skol + Add
Customer ID Primary email	For more information on how to create a connection to QuickBooks, see the online Help.
Address Display name	Customer ID
Currency V Name	5. Customer ID
Value Default tax code	Display name
Value	
Preferred delivery method Given name Fully qualified name Bill with parent Title	The name of the person or organization as displayed. Must be unique across all Customer, Vendor, and Employee objects. Cannot be removed with sparse update. If not supplied, the system generates Display name by concatenating customer name components supplied in the request from the following list: Title, Given name, Middle name, Family name, and Suffix.
Job Balance with jobs	Given name

- 30. You can now map the fields you would like to update in Quickbooks from 1CRM.
- 31. Once all the fields are mapped, click OK.
- 32. Add an error handler to the Search for Customers module by right clicking on the module:



- 33. Select Ignore as the Directive.
- 34. Save and Enable the scenario:



35. The setup is now complete, and accounts will be created and updated from 1CRM to Quickbooks.

3.2 Syncing accounts from Quickbooks to 1CRM

- 1. Login to your Integromat account and create a new Scenario.
- 2. Search and select Quickbooks as the service to integrate and continue:

	What services do you want to integrate? Voc can change this later.	
	Q quickbooks	
quickBooks		

3. Click on the Quickbooks app and select New Event

2	QuickBooks + Add another module
	Search

4. A webhooks selection will appear, click on Add:

Webhook		
	\$ *	Add

- 5. Enter a name for the Webhook (if you have already created a webhook for Quickbooks, select the webhook), select the appropriate Quickbooks accounts and click on Connect.
- 6. Make sure the webhook is selected and click OK.
- 7. Double Click on New Event:



- 8. Click on the new event and select Quickbooks as the new module.
- 9. Select Get a Customer as the action.
- 10. Make sure your connection is selected and select the Object ID as the Customer ID:

Connection My quickbooks connection (qb2@skoll Add
My guickbooks connection (gb2@skoll + Add
oks
Customer ID QuickBooks 1 - New Event
1. Object ID Object ID Object type

11. Drag the new module to the right of the first module and add a filter:



12. Configure the filter as shown below:

	Set up a filter	× ? ×
	Label	
	Customers	
	Condition	
	1. Object type	×
	Equal to	÷
	Customer	
	Add AND rule Add OR rule	
oks 1		
		Cancel OK

- 13. Click OK, then add another module.
- 14. Search and select 1CRM and select Search for Records.
- 15. Select Account as the Module and map the Display Name to the Filter text field.
- 16. Click OK.

- 17. Add another module, and search for Flow Control, then select Router within the Flow Control module.
- 18. The router will be added with two blank modules linked to it. These modules will be used to Create and Update accounts. If you choose to only Create or Update accounts, you can remove one of the blank modules and only follow the steps required to Create or Update accounts.
- 19. Set up a filter for New Accounts only by clicking on the settings icon:



20. Create the condition as shown below:



- 21. Click OK and select the empty module after the filter, select 1CRM.
- 22. Now select the Create a Record action.
- 23. Select your 1CRM connection If you have not set up a 1CRM Connection, you can do so now by adding a connection.
- 24. Select Account as the Module.

- 25. You can now map the fields from Quickbooks to the 1CRM Account.
- 26. Once all fields are mapped, click OK.
- 27. Set up the filter to allow the system to Update accounts that already exist in 1CRM by adding a filter to the remaining blank module.
- 28. Configure the filter as shown below:

Condition	
5. Customer ID	×
Exists 🗢	
and	
1. Last Modified	×
Later than 🗢	
5. Meta data: Last updated time	
Add AND rule Add OR rule	

- 29. Click on the remaining blank module and select 1CRM, then Update a Record.
- 30. Select your connected 1CRM account and select Account as the Module.
- 31. Select the Record ID from the Search for Records module:

	Bundle order position Display name	New API (admin) Add
	ID Date Crewed	For more information on how to create a connection to 1CRM, see the online Help.
	Last Modified	Module 🖒
.1	Modified by ID (modified user)	Account \$
2	Assigned to	Record ID
	ID (assigned_user) Created by	
	ID (created_by_user) Deleted	If the ID of the record doesn't exist, it will be created.
	Currency ID (currency)	Created if it does not exist
	Exchange Rate	Assigned to (assigned_user_id)
	Default Price Book	
٢	ID (default_pricebook)	V User ID assigned to record

- 32. You can now map the fields you would like to update in 1CRM from Quickbooks.
- 33. Once all the fields are mapped, click OK.
- 34. Add an error handler to the Search for Records module by right clicking on the module:



- 35. Select Ignore as the Directive.
- 36. Save and Enable the scenario:

			Ignore 15
CHEDULING	% i∱ …	0 🗶 💶	HI +

37. The setup is now complete, and accounts will be created and updated from Quickbooks to 1CRM.

3.3 Syncing Invoices from 1CRM to Quickbooks

- 1. Login to your Integromat account and create a new Scenario.
- 2. Search and select 1CRM as the service to integrate and continue:

	What services do you want to integrate? vocan change this later.	
	Q, tam	
1CRM		

3. Click on the 1CRM app and select New Event

	1CRM
Š	+ Add another module Search
1	

4. A webhooks selection will appear, click on Add:

Webhook			
	÷	~	Add

- 5. Name the webhook and add a connection if you have not already done so, name your connection and enter the Domain as your 1CRM URL (eg. mycompany.1crmcloud.com)
- 6. Enter the Admin username and password for your 1CRM instance.
- 7. Click Continue and ensure that the correct connection is selected.
- 8. Select "create" as the Webhook Type.
- 9. Select "Invoice" as the Module and save the Webhook.
- 10. Select the newly created webhook and click OK.
- 11. Add a new Module:



- 12. Search for the Flow Control module and select Iterator.
- 13. Click OK leaving the Array field empty
- 14. Add a new module to the Iterator and again search for Flow Control, then selecting Array aggregator.
- 15. Select Iterator as the source module and click OK.
- 16. Add another module and search and select the Quickbooks module, then search and select Search for Customers:



- 17. Select your connected Quickbooks account Or connect your Quickbooks account if you have not already done so.
- 18. Select "field" as the Search By option.
- 19. Select "Display Name" as the filter, select Billing Account as the filter value and set the limit to 1:

Sea	arch by	map:
f	ield	\$
Filt	ter	
	Display name	÷ ×
	Equals	÷
	Add AND rule	

- 20. Add another module to the Search for Customers module and select Quickbooks.
- 21. Select the "Create an Invoice" option:

	ijinchiteeskx	Create an Invoice Creates an invoice.
	Qiethioesta	Update an Invoice Updates an invoice.
	Questiones	Delete an Invoice Removes an invoice.
	Queckhooks	Get an Invoice Returns info about an invoice.
	ijiitMooks	Search for Invoices Searches for invoices.
	€ ijietheeks	Download an Invoice Downloads an invoice.
ଚ	ijiiethtootta	Send an Invoice Sends an invoice.
O	BILL	
-	€ ijietheeks	Create a Bill Creates a bill.
	∯inthesis	Update a Bill Updates a bill.

22. Map the Customer field to the Customer ID retrieved from the Search for Contacts module:

	QuickBooks	⊠ ? ×
	Connection	
	My quickbooks connection	n (1CRM Corj 🗘 Add
thod	For more information on how to QuickBooks, see the online Help.	
ame	6. Customer ID	the second se
	Lines	map:
	• Add item	
	□ Show advanced settings	Cancel

23. Click OK (We will return to this module to map the rest of the fields).

- 24. Right click on the 1CRM New Event module and click on "Run this module only" create a test invoice in 1CRM.
- 25. Once the invoice is received, the module will become green:



26. Now click on the Iterator module and select line_items[] as the Array:



- 27. Click OK and enter the Array aggregator module.
- 28. Select Line Items as the Target structure type.
- 29. You can now map the line item fields from the Iterator module:

	Lines	
	Amount	
	2. ext_price	
	Description	
	2. Line Item Description	
	Quantity	
	2. Qty.	
а	Unit price	
	Unit price	
	ltem	map:

- 30. Line item tax codes now should be configured by setting a single default tax code (Step 31), or by mapping multiple tax codes (Step 32). To get your Quickbooks tax code ID's, please follow this link: https://www.1crm.com/qb/auth.php
- 31. Setting up a default tax code for all line items (Simple configuration)
 - i. Obtain your tax code ID from the link above.
 - ii. Set the Tax code field in Line items to the ID retrieved:

Tax code	map:
5	

32. Setting up conditional tax codes (More complex configuration)

- i. Obtain your tax code IDs from the link above.
- ii. Click on the Tax Code field in Integromat and select the Gear icon, then select the Switch function:

 Time zone: Atlantic/Reykjavik For more information about suppor online Help. 	rted date formats, see the	- L	© X⁴			₿	Ø*	?	×
Tax code	map:	Gene	ral functio	ons					
<pre>switch(2. Line Item Tax ; 4 ; null) switch(2. Line Item Tax Percentage </pre>		FUNCTION	utionId DNS get if	ifeng	oty s	witch	omit	pick	
null) Class	map:		= and	or					
	÷	true	false	ignor	e nu	111			

- iii. You can now set up conditional tax codes. The left hand side of the above image is an example of this. The meaning of this is as follows: If the Line item tax percentage from 1CRM is 15%, then the tax code ID 4 will be used, and if the tax percentage is 10%, tax code ID 8 will be used in Quickbooks, the null option at the end is to prevent a value if the switch is not true.
- 33. Once all line item fields are mapped, return to the Quickbooks Create an Invoice module.
- 34. At the Lines field, enable "map" and map this to the Array[] field as shown below:

Company name	My quickbooks connecti	on NEW 3 (TCF = Add
Family name	For more information on how	to create a connection to
Print on check name	QuickBooks, see the online He	lp.
Flow Control 3 - Array aggregator	Customer	map:
Array[]	6. Customer ID	
1CRM 1 - New Event	Lines	map:
Line Items[]	3. Array[]	
Total Tax 0		
Total Discount 0		

- 35. Click on Show advanced settings to display all available Quickbooks fields and map them as required.
- 36. Once all the fields are mapped, add a filter to only allow invoices to be created if a Customer ID is present. Click on the settings icon between Search for Customers and Create an Invoice:



37. Set up the filter as shown below:

Set up a filter	≈ ? ×
Label	
With Customer ID Only	
Condition	
6. Customer ID	×
Exists	÷
Add AND rule Add OR rule	
	Cancel OK

- 38. Add another module after the Create an Invoice module from Quickbooks.
- 39. Select 1CRM, then Update a Record.
- 40. Select Invoice as the Module, then map the ID field from the original 1CRM invoice to the Record ID field and map the Quickbooks Invoice ID field to the Integrated ID field:

1CRM 1 - New Event	Invoice	· .
Line Items[]	Record ID	
Total Tax		
Total Discount	1. ID	
Total Shipping	If the ID of the record doesn't exist, it will be created	d.
ID		
Date Created	Created if it does not exist	map:
Last Modified		
Modified by	Line Items	map:



41. Click OK and Save and Enable the scenario:



42. The setup is now complete, and invoices will be created from 1CRM to Quickbooks.

3.4 Syncing Invoices from Quickbooks to 1CRM

- 1. Login to your Integromat account and create a new Scenario.
- 2. Search and select Quickbooks as the service to integrate and continue:

V	Vhat services do you want to integrate? You can change this later.	
	Q quickbooks	
quickbooks QuickBooks		

- 3. Click on Quickbooks and select the "New Event" trigger.
- 4. If you already have an active Webhook set up, select it, or add a new Webhook for Quickbooks.
- 5. Add a new module and select Quickbooks.
- 6. Select Get an Invoice.
- 7. Map the Object ID field to the Invoice ID:

	QuickBooks	×	? >
	Connection		
	My quickbooks connection (1CF	RM Corj 🕈	Add
☆ ŵ X ¹ A 茴 目 (* ?	 For more information on how to create a QuickBooks, see the online Help. 	connection to	
QuickBooks 1 - New Event	Invoice ID		
Object ID	1. Object ID		
Object type Operation			
Last updated		Cance	ОК
Get an Invoice			

- 8. Enter your Quickbooks instance and edit an invoice, make sure that the invoice you open in Quickbooks has the necessary features required for the integration such as Discounts, Taxes, etc.
- 9. Check the URL of the invoice opened in Quickbooks, you will find a parameter in the URL named txnld, copy the ID followed by this parameter, e.g. 96.
- 10. Right click on the Get an Invoice module and click on Run this module only.
- 11. You will be prompted for an Object ID, enter the ID you retrieved from Quickbooks here and click OK.
- 12. If the invoice was retrieved successfully, the module will become green:



13. Set up a new filter between the two modules:



14. Configure the filter as shown below:

×
\$

- 15. Click OK and add a new Module.
- 16. Search for the Flow Control module and select Iterator.
- 17. Map the TaxLine field to the array, see below:



- 18. Click OK and add a new module to the Iterator and again search for Flow Control, then selecting Array aggregator.
- 19. Select Iterator as the source module and click OK.
- 20. Add a new module, again selecting the Flow Control > Iterator module.
- 21. Map the Line array field to the Array field:



- 22. Click OK and add a new module to the Iterator and again search for Flow Control, then selecting Array aggregator.
- 23. Select Iterator as the source module and click OK.
- 24. Add a new module and search and select 1CRM.
- 25. Select Search for Records.
- 26. Select your 1CRM connection and select the Account module.
- 27. Map the Quickbooks Customer Name field to the Filter text field:



- 28. Scroll to the bottom and limit the query to 1 and click OK.
- 29. Add a new module and select 1CRM, then select Create a Record.
- 30. Select your 1CRM connection and select Invoice as the Module.
- 31. Map the Invoice field in the 1CRM module, leaving the Line items field blank for now, we will return to map the Line items.
- 32. Map the Quickbooks Invoice ID field to the Integrated Field in 1CRM:

	Deposit	
	Allow IPNP payment	
	Allow online payment	Use Price Book (pricebook_id)
	Allow online credit card payment	
	Allow online ACHP payment	
Invoice ID <text> Raw: Id</text>	Invoice ID	Integrated ID
	Sync token	
	Meta data	2. Invoice ID
	Create time	
	Last updated time	LBL_PAYMENT_PROCESSOR (payment_processor_id)
	Custom field[]	

- 33. Enter the first Array aggregator module.
- 34. Select Line Items as the Target structure type.
- 35. You can now map the line item tax fields from the Iterator module:

	Target structure type			
	Line Items		÷	
	Line Items			ĺ
	Line Item Description			l
				l
	Qty.			l
				l
	Mfr. Part No.			ŀ
	Unit Price			Ì
ī				,
	Line Item Tax Percentage			l
	8. TaxLineDetail: TaxPercent			l
	Line Item Tax Amount			l
	8. Amount			l
	Line Item Discount Percentage			l
	Line Item Discount Amount			l
				â
				l

- 36. Click OK and enter the second Array Aggregator module.
- 37. Again, select Line Items as the Target structure type.
- 38. Map the rest of the Line item fields as required, note that the Line Item tax information must be mapped from the previous array we created

	Description	arget structure type	
	Amount 2500	Line Items \$	
	Detail type SalesItemLineDetail		
	Sales item line detail	Line Items	
	Item Init price 250	Line items	
	Unit price 250 Quantity 10	Line Item Description	
	Tax code ref	4. Description	
	ItemAccountRef	- Destaption	
	Temaccountrer	Qty.	IΕ
•• (Flow Control 🤋 - Array aggregator		Ē
r	Array[]	4. Sales item line detail: Quantity	10
	Line Item Description		
	Oty.	Mfr. Part No.	RN
	Mfr. Part No.		a Re
	Unit Price		
	Line Item Tax Percentage	Unit Price	
	Line Item Tax Amount	4. Sales item line detail: Unit price	
	Line Item Discount Percentage		
	Line Item Discount Amount	Line Item Tax Percentage	
	QuickBooks 3 - Get an Invoice	9. Array[1]: Line Item Tax Percentage	
	Deposit		
	Allow IPNP payment false	Line Item Tax Amount	
	Allow online payment false		
	false		

Note: Only add the Tax percentage OR amount, do not enter both values.

- 39. Once all line item fields are mapped, return to the 1CRM Create a Record module.
- 40. Map the array created to the Line Items field:

	ID (customer_level) IBL_PAYMENT_PROCESSOR_LIST ID (payment processor)	see the online Help. Module C	
	External Customer ID	Invoice +	
_	WooCommerce ID woo_locked	Line Items map:	
	Favorite	12. Array[]	,
	Flow Control 😰 - Array agoregutor	 Must contain at least 1 item(s). 	
•• (Array[]	Total Tax	
J.	Xero 1 - Watch Invoices		
	Type ACCREC Invoice ID fc8cd936-a4e0-4fd8-b6da-6170d962c28	Total Discount	
	Invoice Number INV-0026		

- 41. Once all the fields are mapped, add a filter to only allow invoices to be created if an Account ID is present. Click on the settings icon between Search for records and Create a Record.
- 42. Set up the filter as shown below:

Set up a filter 🛛 🔀 📍	×
Label	
Condition	×
Exists ¢	
Cancel	ок
$\langle \rangle$	

- 43. Right click on the 1CRM Search for Records module and click on Add error handler, then select the Ignore option.
- 44. Save and Enable the scenario:



45. The setup is now complete, and invoices will be created from Quickbooks to 1CRM.

3.5 Syncing Quotes between 1CRM and Quickbooks Online

1. The same process for Invoices can be followed to sync Quotes to and from1CRM, however, Integrated ID is not required for this integration and of course, be sure to select the Quote module instead of the Invoice module where applicable.

3.6 Syncing Payments from 1CRM to Quickbooks Online

- 1. Login to your Integromat account and create a new Scenario.
- 2. Search and Select 1CRM as the service to integrate and continue.

	What services do you want to integrate? Nou can change this later.	
	Q tan	
1 CRM		

3. Click on the 1CRM app and select New Event

୬	1CRM + Add another module
Be	Search

4. A webhooks selection will appear, click on Add:

Webhook		
	\$ *	Add

- 5. Name the webhook and add a connection if you have not already done so, name your connection and enter the Domain as your 1CRM URL (eg. mycompany.1crmcloud.com)
- 6. Enter the Admin username and password for your 1CRM instance.
- 7. Click Continue and ensure that the correct connection is selected.
- 8. Select "create" as the Webhook Type.
- 9. Select "Payment" as the Module and save the Webhook.
- 10. The newly created Webhook will now be available to select.

1CRM				
Webhook				
Payments	\$	-	Ad	ld
We read your mind, we attached automatically for you.	r unis webhook to	TCRIVI		
Show address For more information on how the online Help.	to create a webhc	ok in 1	CRM, :	see

11. Add another module to the scenario:

+ Add another module	
1CRM 1 New Event	

- 12. Search for the Flow Control module and select Iterator.
- 13. Click OK leaving the Array field empty
- 14. Add a new module to the Iterator and again search for Flow Control, then selecting Array aggregator.
- 15. Select Iterator as the source module and click OK.
- 16. Add a new module.
- 17. Search and select the Quickbooks module, then search and select Search for Customers:

	Get a Purchase Order Returns details about a purchase order. Search for Purchase Orders Searches for a purchase order.	
୭	CUSTOMER Create a Customer Creates a customer.	
g	Update a Customer Updates a customer.	qu
	Get a Customer Returns info about a customer.	
	Search for Customers Searches for customers.)u Cre

18. Select your connected Quickbooks account – Or connect your Quickbooks account if you have not already done so.

- 19. Select "field" as the Search By option.
- 20. Select "Display Name" as the filter, select Account as the filter value and set the limit to 1:

Se	arch by	map:
f	field	\$
Filt	ter	
	Display name	÷ ×
	Equals	\$
	Add AND rule	

- 21. Add another module to the Search for Customers module and select Quickbooks.
- 22. Select Create a Payment.
- 23. Map the fields as required, map the array[] field to the Lines field:

IsProject false	Lines	ap:
ClientEntityId 0	8. Array[]	
domain QBO		
sparse false	Private note	
Flow Control 8 - Array aggregator		
Array[]		
IMTAGGLENGTH 2	Transaction date	
1CRM 1 - New Event	1. Payment Date	
ID b9a81b79-f1a0-5ad6-71fb-5f90551cdcd3	Time zone: Africa/Johannesburg	
Deleted 0	 For more information about supported date formats, si online Help. 	ee the
Date Created October 21, 2020 3:38 PM		
Last Modified October 21, 2020 3:38 PM	Payment ref number	

- 24. Once all field are mapped, click OK and return to the Array aggregator module.
- 25. Select Lines as the Target structure type.
- 26. Map the amount field from the Iterator:

		Flow Control 7 - Iterator
		Total number of bundles
	🛛 ? ×	Bundle order position
ource Module		Value date_modified 2020-10-21 15:38:13 deleted 0
Iterator [7]	\$	currency_id -99
Please select the module whose output you wi	sh to aggregate.	exchange_rate 1 invoice_id 2b1d78d3-2217-c5a7-d687-5f9051485b7
rget structure type		payment_id b9a81b79-f1a0-5ad6-71fb-5f90551cdcd3
Lines		amount 20125 amount_usdollar 20125
Lines		integrated_id 99
Amount		1CRM 1 - New Event
Amount		ID b9a81b79-f1a0-5ad6-71fb-5f90551cdcd3
7. amount		Deleted 0
		Date Created October 21, 2020 3:38 PM
Linked Transactions	map:	Last Modified October 21, 2020 3:38 PM
- Transaction ID: 7. integrated id	1 22 1	Assigned to admin

- 27. Click on Add item at Linked Transactions.
- 28. Map the integrated_id field to the Transaction ID and select Invoice as the Transaction Type, then click Add and OK. The setup should look like the screenshot below:

Source Module	
Iterator [7]	\$
Please select the module whose output you will	sh to aggregate.
Target structure type	
Lines	\$
Lines Amount	
7. amount	
Linked Transactions	map:
Transaction ID: 7. integrated_id Transaction Type: Invoice	ľŪ
G Add item	
□ Show advanced settings	Cancel OK

29. Add an error handler to the Search for Customers module by right clicking on the module:

nturt		
quick	Settings	Ϋ
	Run this module only	
	\Lambda Add error handler	
	☆ Rename	
Quick	Clone	Qu
Search for	🕞 Add a note	Cre
	🖞 Delete module	

- 30. Select Ignore as the Directive.
- 31. Save and Enable the scenario:



32. The setup is now complete, and Payments will be created from 1CRM to Quickbooks.

3.7 Syncing Payments from Quickbooks to 1CRM

- 1. Login to your Integromat account and create a new Scenario.
- 2. Search and select Quickbooks as the service to integrate and continue:

W	'hat services do you want to integrate? vou can change this later.	
	Q quickbooks	
quickbooks QuickBooks		

- 3. Click on Quickbooks and select the "New Event" trigger.
- 4. If you already have an active Webhook set up, select it, or add a new Webhook for Quickbooks.
- 5. Add a new module and select Quickbooks.
- 6. Select Get a Payment.
- 7. Map the Object ID field to the Payment ID:

	QuickBooks 🛛	? ×
	Connection	
	My quickbooks connection NEW 3 (1CF 🗢	Add
quickbooks.	For more information on how to create a connection QuickBooks, see the online Help.	to
dickbooks.	Payment ID	
	1. Object ID	
uickBooks 2	Cano	cel OK
et a Payment		

8. Set up a new filter between the two modules:

atur Turckbooks.	eee attat guickbooks.
7	♥ Set up a filter
	& Unlink
QuickBooks	+ Add a router JickBooks 2
New Event	+ Add a module Set a Payment
	Add a note

9. Configure the filter as shown below:

Set up a filter	×	?	×
Label			
Payments			
Condition			
1. Object type			×
Equal to		ŧ	
Payment			
Add AND rule Add OR rule			
	Cance		ок]

- 10. Click OK and add a new Module.
- 11. Search for the Flow Control module and select Iterator.
- 12. Map the Line[] field to the array, see below:



- 13. Click OK and add a new module to the Iterator and again search for Flow Control, then selecting Array aggregator.
- 14. Select Iterator as the source module and click OK.
- 15. Add a new module and search and select 1CRM.
- 16. Select Search for Records.
- 17. Select your 1CRM connection and select the Account module.
- 18. Map the Quickbooks Customer Name field to the Filter text field:



- 19. Scroll to the bottom and limit the query to 1 and click OK.
- 20. Add a new module and select 1CRM, then select Create a Record.
- 21. Select your 1CRM connection and select Payment as the Module.
- 22. Map the Payment fields in the 1CRM module, the Related invoices field can be mapped to the Array[] field:

pp_credit_credit	Flow Control 7 - Array aggregator	
	Array[]	
	IMTAGGLENGTH 1	
pp_credit_invoice	QuickBooks 2 - Get a Payment	
	Payment ID 81	
Related invoices	Customer	
7. Array[]	Value 1 Name 2 Big Consolidation Corp	
	Deposit to account	

- 23. Enter the Array aggregator module.
- 24. Select Related invoices as the Target structure type.
- 25. You can now map the related invoice fields from the Iterator module, see below:

		Total number of bundles					
		Bundle order position					
Array aggregator	82 ? ×	Value					
,		Amount 9775					
Source Module		LinkedTxn[]					
Iterator [6]	÷	TxnType Invoice					
		LineEx 🔻					
Please select the module whose output	it you wish to ago egate.	any[] 🔻					
larget structure type		QuickBooks 2 - Get a Payment					
Related invoices		Payment ID 81					
		Customer					
Related invoices		Value					
		Name 2 Big Consolidation Corp					
Invoice ID		Deposit to account					
6. LinkedTxn[1]: TxnId		Value 78					
		Payment method					
Amount		Value Payment ref num					
6. Amount		Total amount 9775					
		Unapplied amount 0					
		Process payment false					
Show advanced settings	Cancel OK	Sync token 0					
5 Show datanced Settings	Cancer	Meta data					

- 26. Click OK and add a filter to only allow invoices to be created if an Account ID is present. Click on the settings icon between Search for records and Create a Record.
- 27. Set up the filter as shown below:

Set up a filter	×	?	×
Label			
Condition 4. ID			×
Exists		¢	î
Add AND rule Add OR rule			
			ок
	Cance		JK

- 28. Right click on the 1CRM Search for Records module and click on Add error handler, then select the Ignore option.
- 29. Save and Enable the scenario:



30. The setup is now complete, and payments will be created from Quickbooks to 1CRM.



1CRM & INTEGROMAT

A Guide to Integromat Integration Setup for Xero & Quickbooks Online

							٢					88 admin	
1CR	1CRM System ENT-8.5.0 • 1CRM Corp. Public Demo (50U)			Q Search -		🛱 Wednesd	ay January 24, 2018		⊠ 39	⊠ 39			
	Today's Activities	5	ales & Marketing	(Order Management		Project Management	Custo	omer Service		Reports & Settings	1	CR
	🖻 🗂 Home Dashb	oard										*	* *) G
	Calendar				* 10 = C	🔊 Opportur	nities Funnel Chart		\$ 13.	🗈 My	Contacts	\$	Q (% 12
	🗖 Day 📑 Week 📑 N	Month 🔚 Year					Pipeline tota	al is \$5,145.00K		Cre	ate	Page 1 2	3 ≯
	•	January 2018	►		Select Date •			Prospe			me 🤤	Office Phone	
	K Activities • 🔒 Me •		🛛 Call	Is 🕑 Meetings 🗄	Tasks More (1) •	365		Needs	Analysis		nber Alsup asity Aranda	% +1 (835) 1 % +1 (791) 9	
v	Veek Mon	Tue	Wed	Thu	Fri	480		Value	Proposition cision Makers		ittney Bessey	\$ +1 (280) 0	
		2	3	4	5	4		Percep	tion Analysis	l Ra	ndal Botsford	% +1 (488) 4	06-8146
2:26	° ■ ≎ III.		10		40		500-480		al/Price Quote ation/Review	O Br	andie Boyster	% +1 (351) 5	551-2411
	🗹 38: 53 m 💓 admin	9	10 17	11			690 - 480		ng Paperwork	🕿 My	Calls	\$ (9. W. Z
Dopportunities Funnel Cl	hart 🌣 🕲						Hover over a	wedge for details.		Cre	ate	Page 1 2	3 *
Pipeline total is \$5		23	24	25	26	Shows cumu	lative opportunity amo	unts by selected lead so	ource for selected	Clo	ose Subject	Start Da	te
280 0	Prospecting Qualification	h	14-16		11-13			users.		0 ×	West Coast Conf Call	Friday,	
- 585	Veeds Analysis Value Proposition		Replacement	ales Meeting	Kickoff Meeting			La	ist run: 7 minutes ago	0 ×	Left a message	2018-0 00:00	01-31,
625	ld. Decision Makers Perception Analysis		Windows		West Coast Conf Call	My Quote	s		\$ Q 10 Z	0 ×	Left a message	2018-0	03-09,
380 L F	Proposal/Price Quote Negotiation/Review	30	31	1	2	Create		Pa	ige 1 2 3 ≯	0 ×	Get More information		03-11,
610 - 0 /	Awaiting Paperwork Closed Won		2 0-0:30			Quote #	Shipping Account	Amount Valid Until	Stage		the proposed deal	10:45	
Hover over a wedge	for details.		Left a message			2018-41	C Nelson Inc 2	\$ 1,249.38 2017-05	5-03 DELIVERED	0 ×	Discuss Review Proce	ss 2018-0 12:45	03-13,
Shows cumulative opport	unity amounts by					2018-40	EEE Endowments	\$ 1,695.00 2018-11	-10 ON HOLD	Маси	card of		• 0
selected lead source for	selected users.	ails			\$ Q (% 12		LTD 2				/OFICI : Power management, bette	- 40	\$ U
La	st run: 53 minutes ago			Pa	ge 1 2 3 ¥	2018-39	Gifted Holdings AG 2	\$3,168.54 2018-10	0-10 DRAFT	Animoji,	and more		Ø view
My Quotes	\$ G @ E		Contact		Date 🔶	2018-38	JBC Banking Inc 2	\$ 4,682.24 2018-12	2-25 DRAFT		I: If you turn off iCloud Phot may unintentionally delete		@ view
Create P	rage 1 2 3 ¥		Adelaide Cha		2018-01-05, 16:00	2018-37	2 MTM	\$ 2,173.94 2018-01	-10 DELIVERED	images			
Quote # Shipping Account	Amount Valio		Alana Newby		2017-12-27, 16:00		Investment Bank F S B 2			Google	HomePod will beat Amazon Home (and 5 ways it won't)		<i></i> view
2017-44 CRIVIERA HOTELS 2	\$ 1,320.42 05/		Creg Sund		2017-12-17, 16:00	Cases by	Status by User		\$ 13.		tor Pro 1.0 Whirlwind review ole alternative for pro Photo		Ø view
2017-38 Income Free	\$ 1,910.16 11/		Edmond Sola		2017-12-16,	,		by User - Total: 2	0		N30 Pro review: A Super N controller for the PC	intendo-	<i>⊘</i> view
Investing 2	LP												
6 2017-40 C White Cro	oss \$8,076.74 19/												
Co 2	DI \$1.007.00.111												
9 201/-3/MISSISSI	1,097.23 11												-