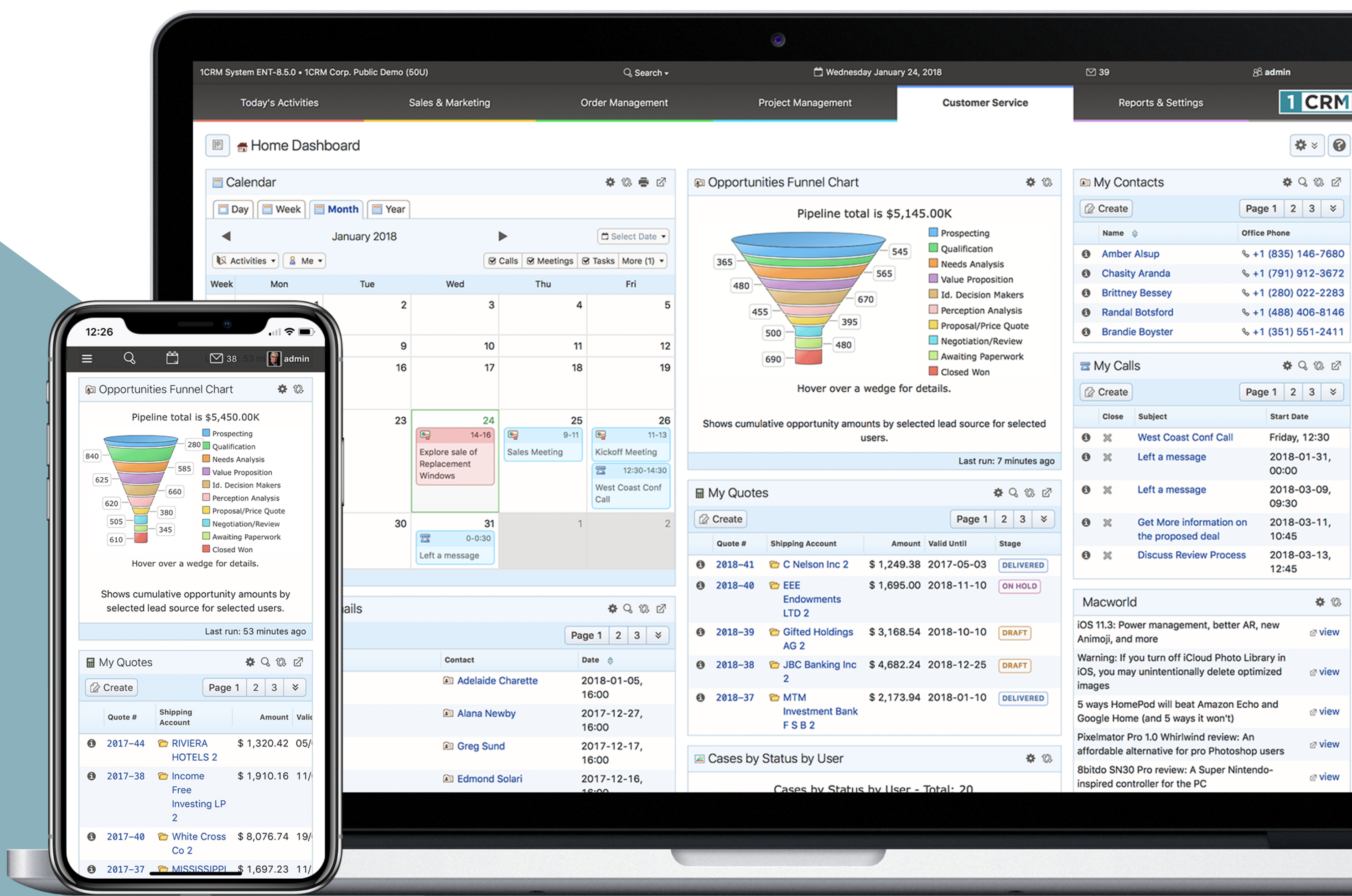
1CRM & INTEGROMAT

A Guide to Integromat Integration Setup for Xero & Quickbooks Online



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 Sales-related 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 drop us a line and we'll demonstrate what it can do for you!

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

Disclaimer

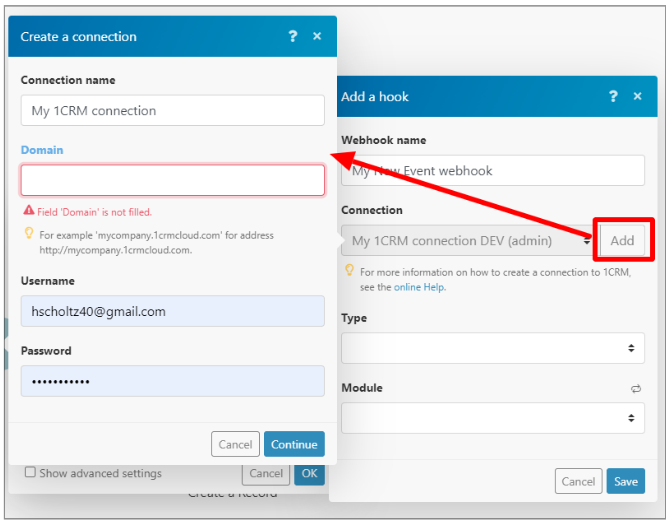
688 Falkland Road
Victoria, British Columbia
Canada V8S 4L5

www.1crm.com

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:



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.

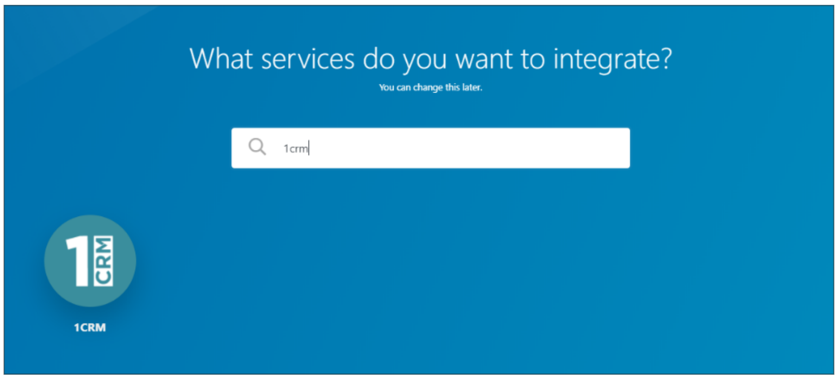
1.2 Configuring the Integromat Timezone

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.

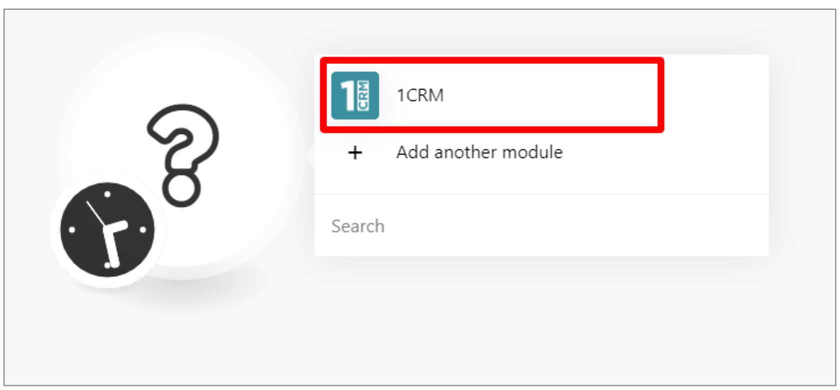
2.0 Integrating with Xero

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:

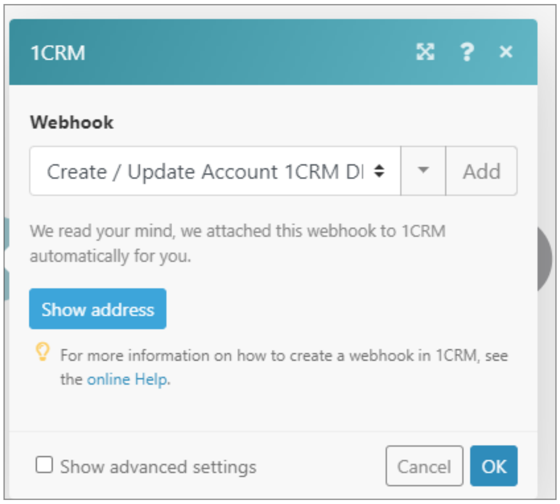


3. Click on the 1CRM app and select New Event



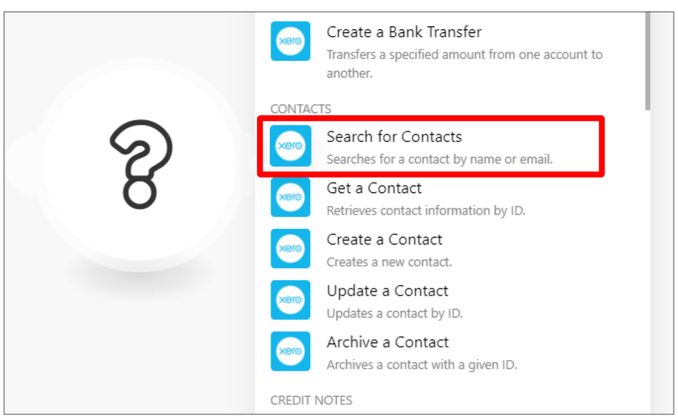
4. A webhooks selection will appear, click on Add:

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.

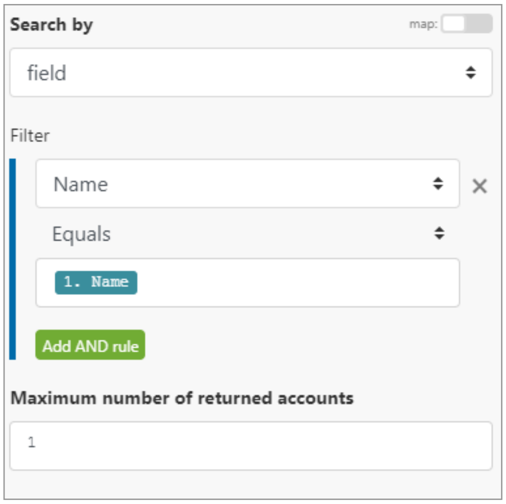


11. Select the webhook and click OK.
12. Add another module to the scenario:

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

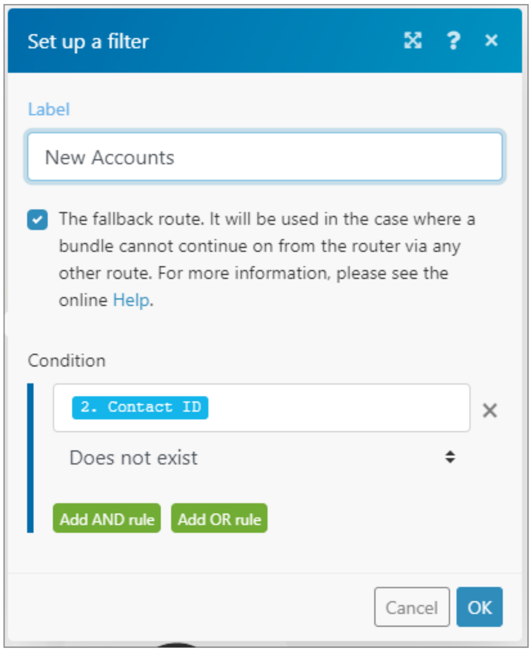


14. Select your connected Xero account – Or connect your Xero account if you have not already done so.
15. Select “field” as the Search By option.
16. Select “Name” as the filter, select Name as the filter value and set the limit to 1:

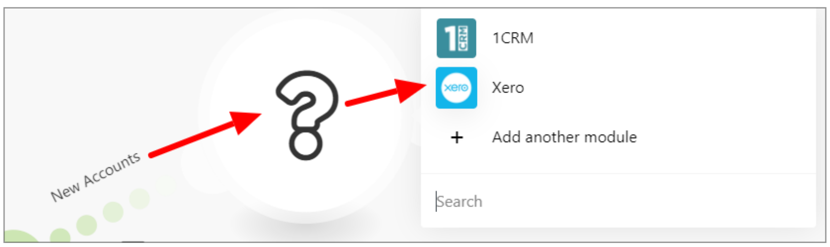


17. Add another module as in step 12, and search for Flow Control, then select Router within the Flow Control module.
18. The router will be added with two blank modules linked to it. These modules will be used to Create and Update accounts. If you choose to only Create or Update accounts, you can remove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

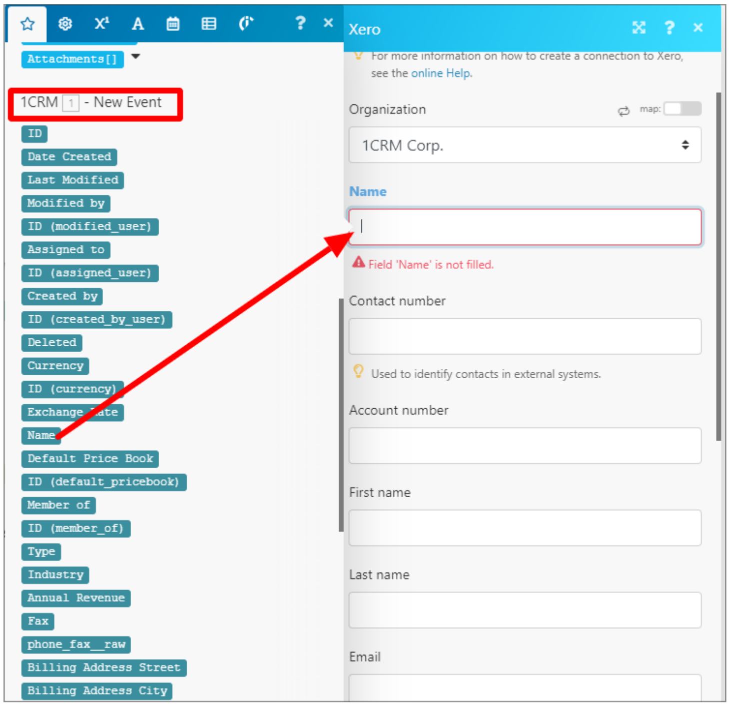
20. Create the condition as shown below:



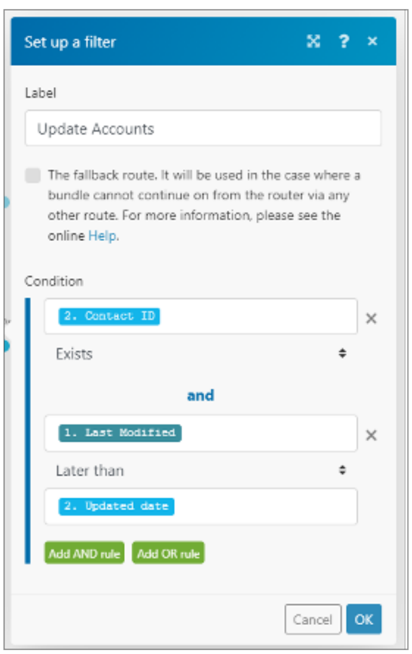
21. Click OK and select the empty module after the filter, select Xero:



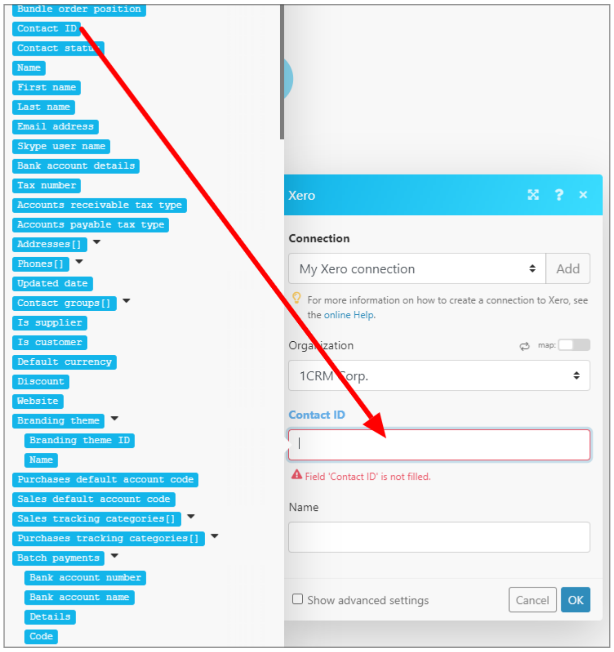
22. Now select the Create a Contact action.
23. If you have not set up a Xero Connection, you can do so now by adding a connection.
24. You can now map the fields from 1CRM to the Xero Contact:



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):

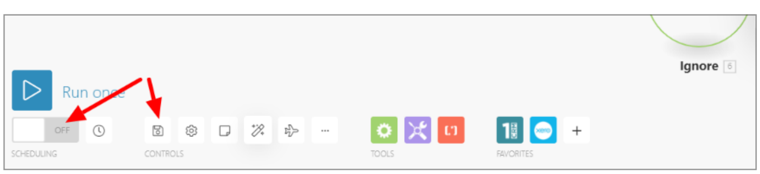


28. Click on the remaining blank module and select Xero, then Update a Contact.
29. Select the Contact ID from the Search for Contacts module:



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:

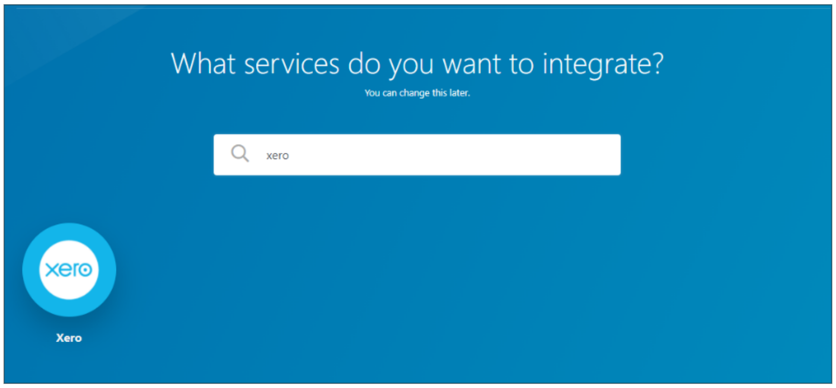
33. Select Ignore as the Directive.
34. Save and Enable the scenario:



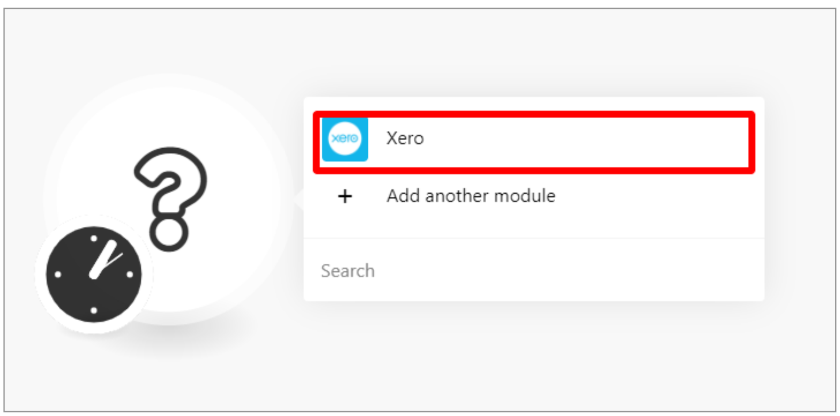
35. The setup is now complete, and accounts will be created and updated from 1CRM to Xero.

2.2 Syncing accounts from Xero to 1CRM

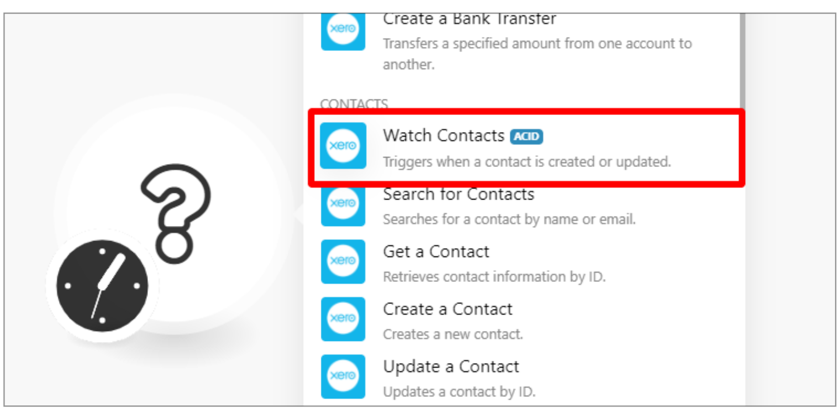
1. Login to your Integromat account and create a new Scenario.
2. Search and select Xero as the service to integrate and continue:



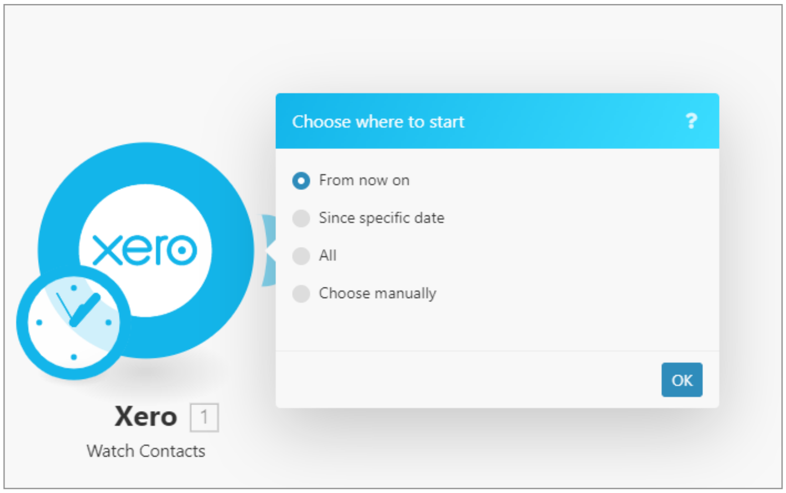
3. Click on the 1CRM app and select New Event



4. Select Watch Contacts:

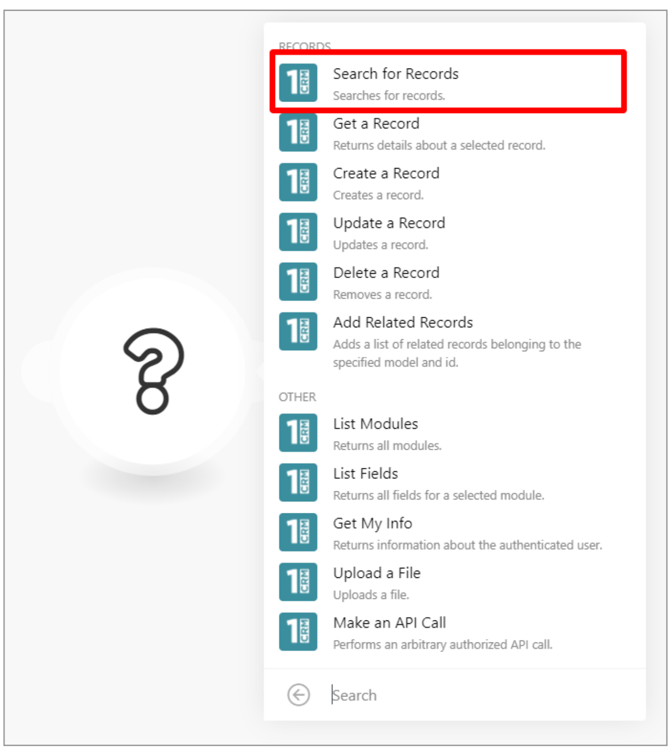


5. Select your connected Xero account or connect a new account.
6. Select your Organization.
7. Select from when the sync should start:



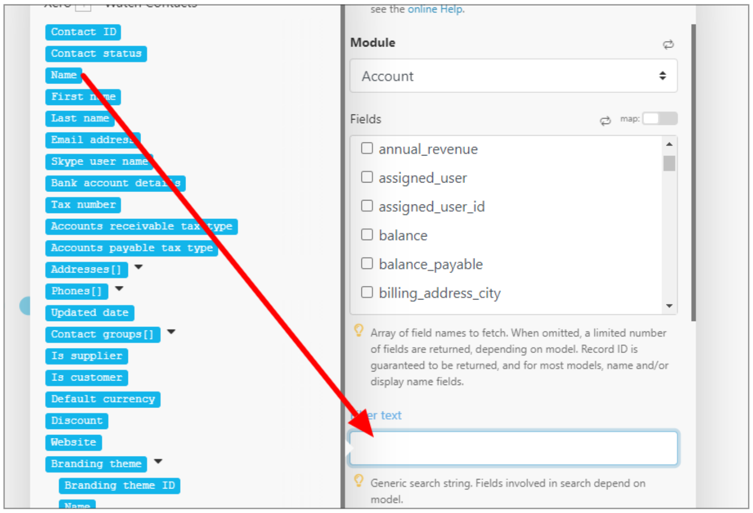
8. Add another module to the scenario:

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

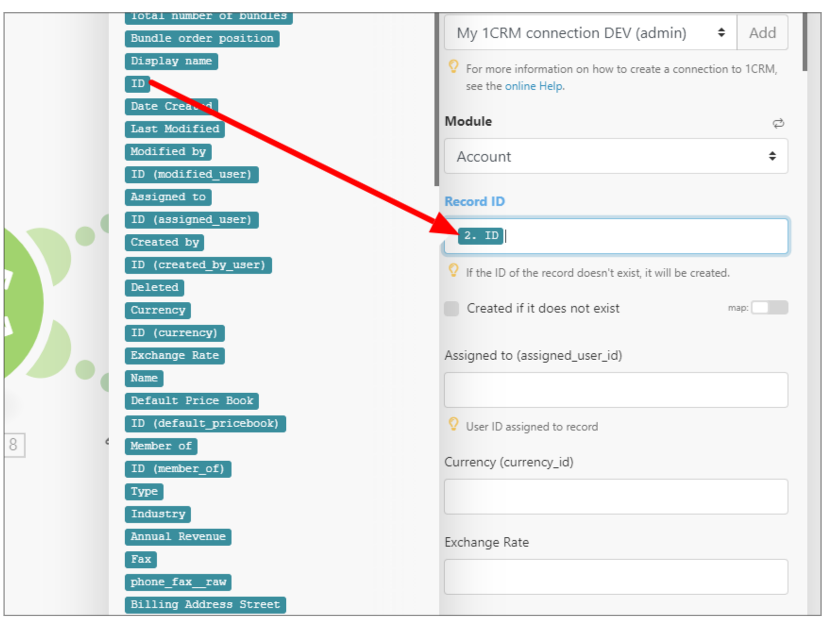


10. Select Accounts as the Module.

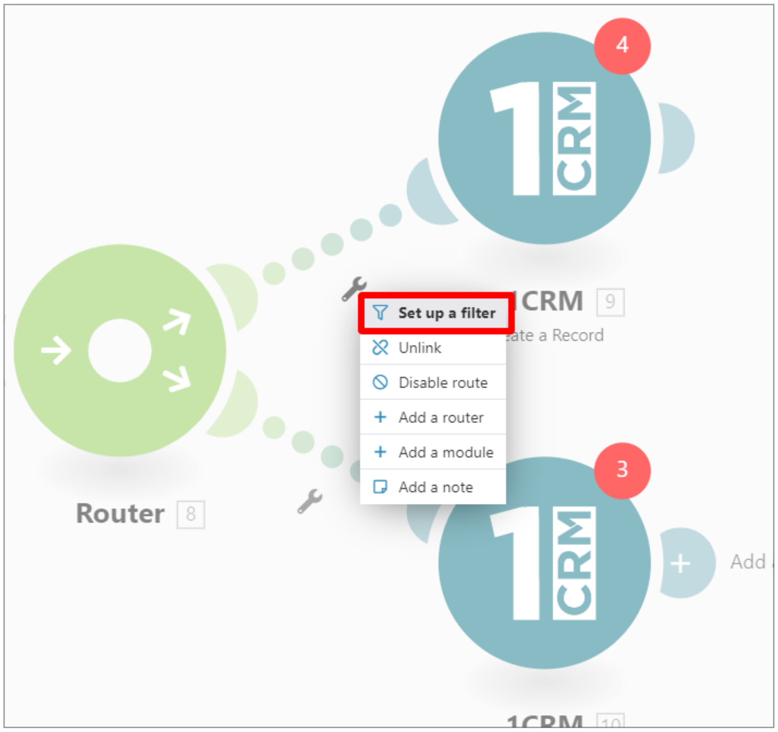
11. Map the Name field from Xero to the Filter text field:



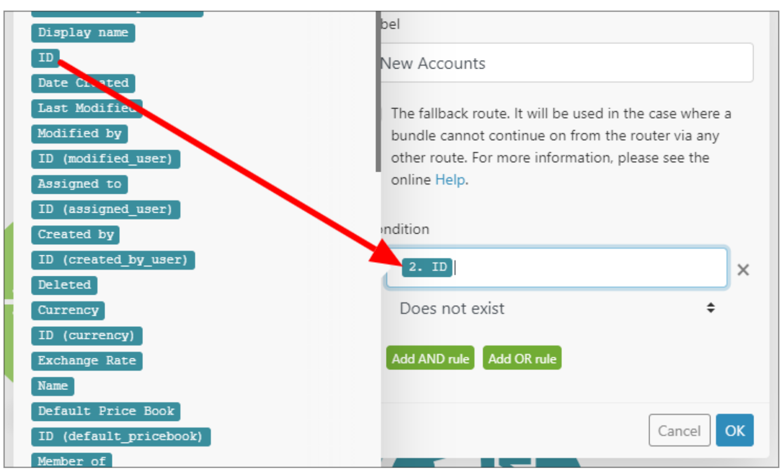
12. Click OK and add another module.
13. Search and select Flow Control, then select Router.
14. Two new modules will flow from the Router.
15. Click on the first module and select 1CRM.
16. Select Create a Record.
17. Select your connected 1CRM account and choose Account as the module.
18. Map all the 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:



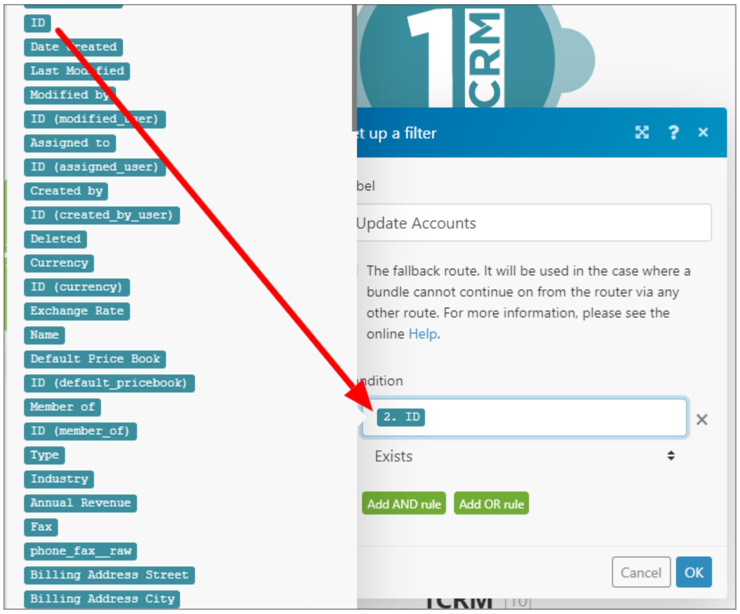
23. Map the rest of the fields as required for the update.
24. Set up a filter between the two 1CRM Create module and the Router.



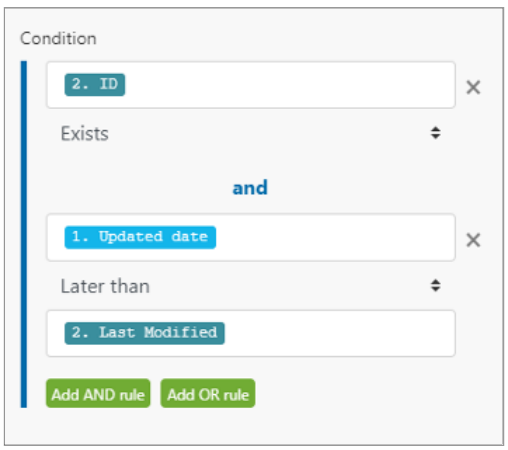
25. Label the filter "New Accounts" and map the 1CRM ID field to the Condition, then set the operator to Exists:



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:

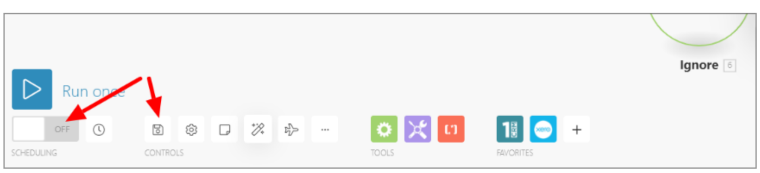


28. Add an "AND" rule and configure it as follows. The Updated date from Xero must be later than the Last Modified date from 1CRM to avoid a 2-way sync causing an infinite looping sequence in the synchronization:



29. Click OK.

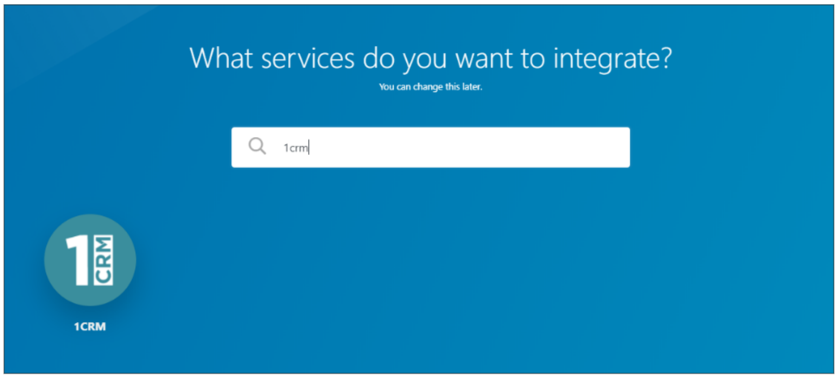
30. Save and Enable the scenario:



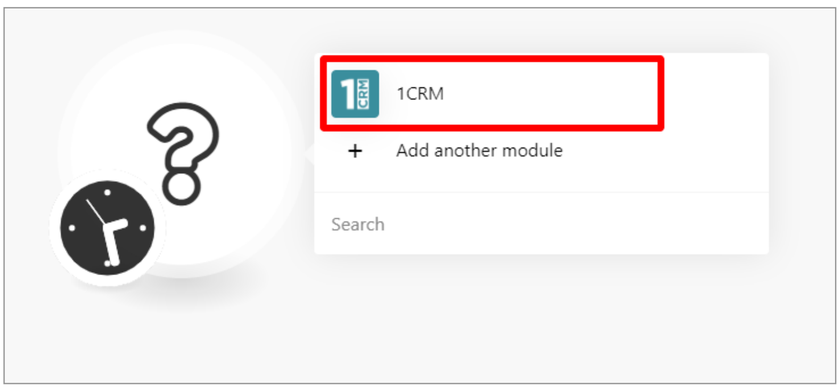
31. The setup is now complete, and accounts will be created and updated from Xero to 1CRM.

2.3 Syncing Invoices from 1CRM to Xero

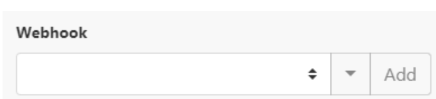
1. Login to your Integromat account and create a new Scenario.
2. Search and select 1CRM as the service to integrate and continue:



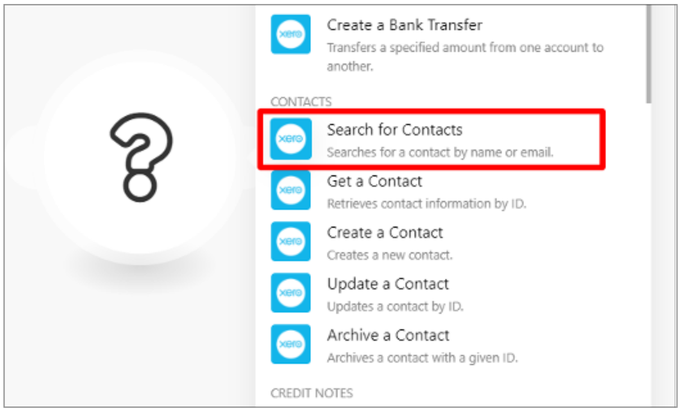
3. Click on the 1CRM app and select New Event



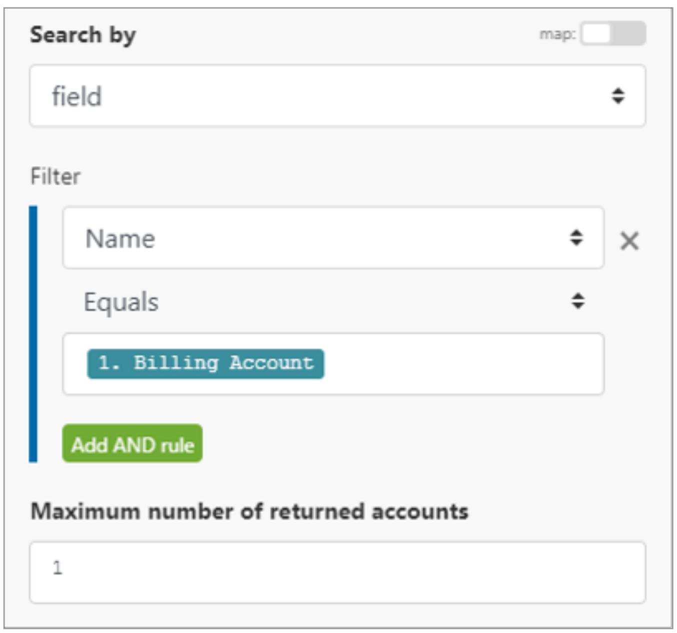
4. A webhooks selection will appear, click on Add:



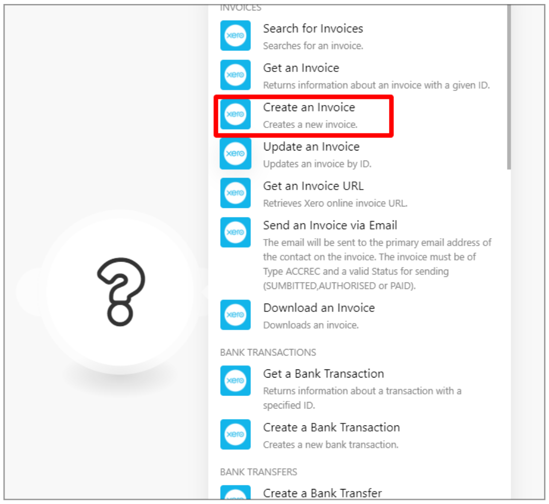
5. Name the webhook and add a connection if you have not already done so, name your connection and enter the Domain as your 1CRM URL (eg. mycompany.1crmcloud.com)
6. Enter the Admin username and password for your 1CRM instance.
7. Click Continue and ensure that the correct connection is selected.
8. 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:



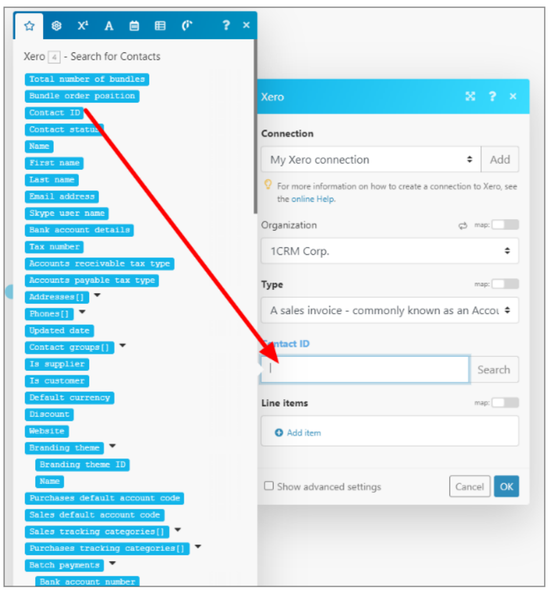
12. Select your connected Xero account – Or connect your Xero account if you have not already done so.
13. Select "field" as the Search By option.
14. Select "Name" as the filter, select Billing Account as the filter value and set the limit to 1:Search for the Flow Control module and select Iterator.



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:

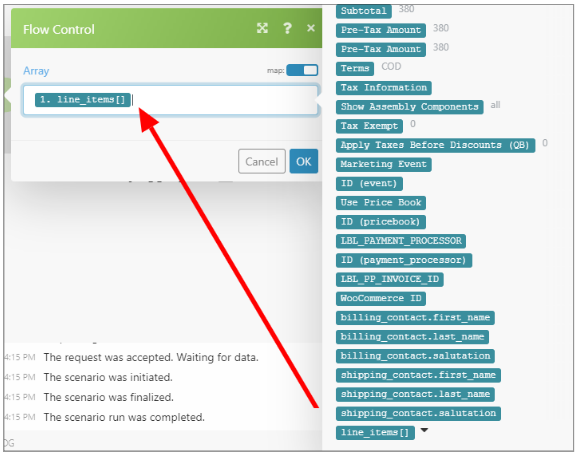


22. Select "A sales invoice" as the type.
23. Map the Contact ID field to the Contact ID retrieved from the Search for Contacts module:

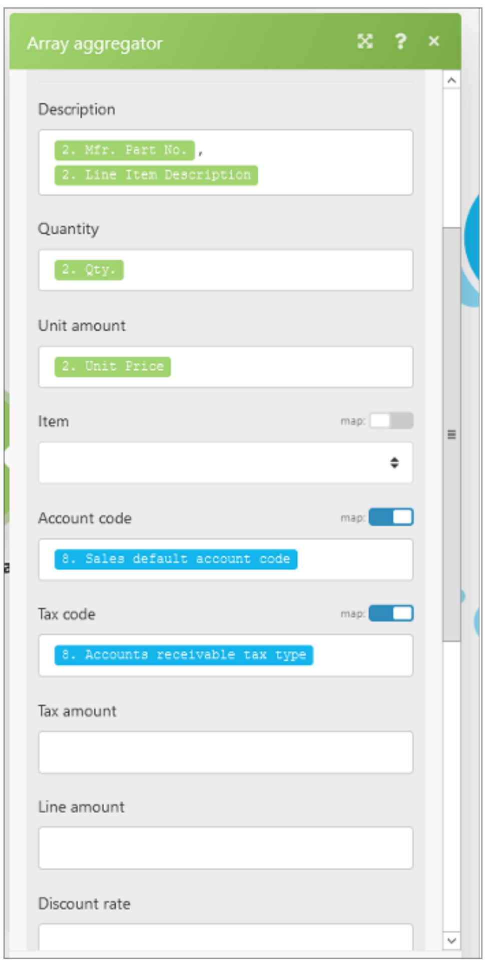


24. Click OK (We will return to this module to map the fields).
25. Right click on the 1CRM New Event module and click on "Run this module only" – create a test invoice in 1CRM.
26. Once the invoice is received, the module will become green:

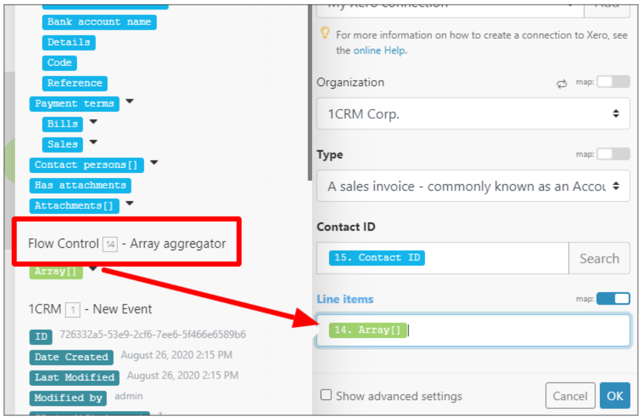
27. Now click on the Iterator module and select line_items[] as the Array:



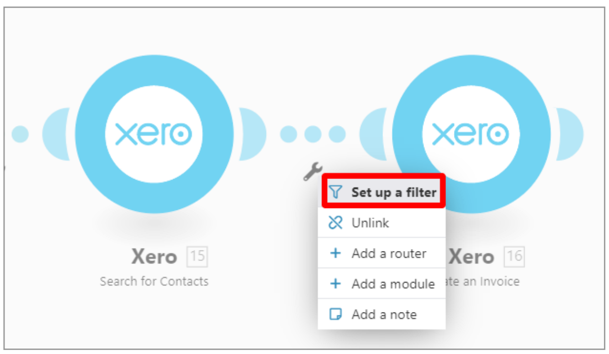
28. Click OK and enter the Array aggregator module.
29. Select Line Items as the Target structure type.
30. You can now map the line item fields from the Iterator module. Some fields can be obtained from the Search Contacts module like the Account code and Tax Code:



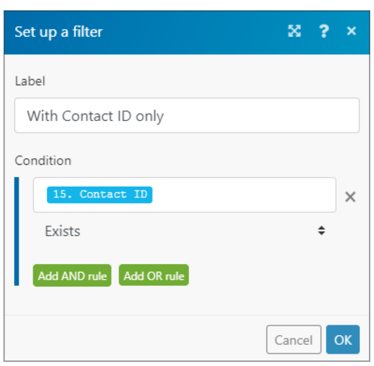
31. Once all line item fields are mapped, return to the Xero – Create an Invoice module.
32. At the Line Items field, enable "map" and map this to the Array[] field as shown below:



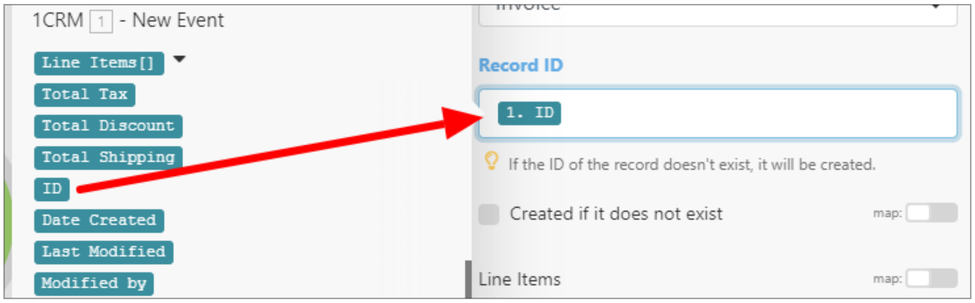
33. Click on Show advanced settings to display all available Xero field and map them as required.
34. Once all the fields are mapped, add a filter to only allow invoices to be created if a Contact ID is present. Click on the settings icon between Search for Contacts and Create an Invoice:



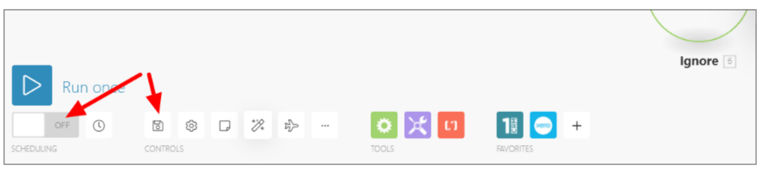
35. Set up the filter as shown below:



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:



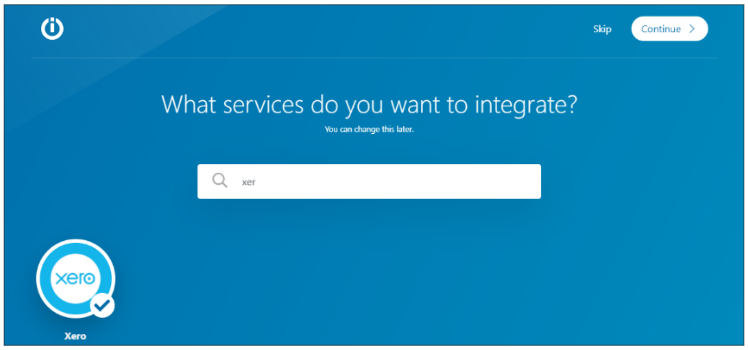
39. Click OK and Save and Enable the scenario:



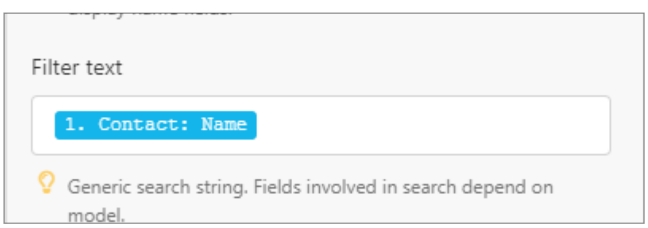
40. The setup is now complete, and invoices will be created from 1CRM to Xero.

2.4 Syncing Invoices from Xero to 1CRM

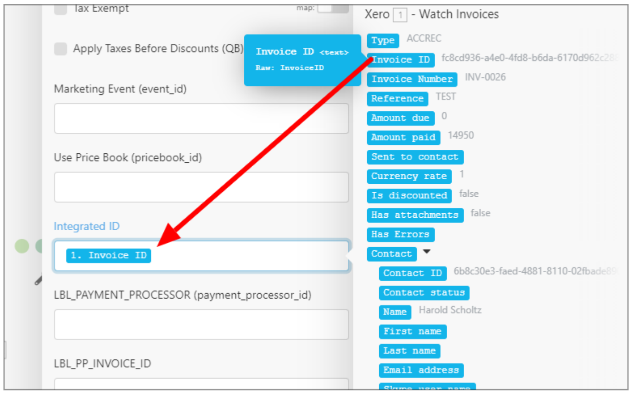
1. Login to your Integromat account and create a new Scenario.
2. Search and select Xero as the service to integrate and continue:



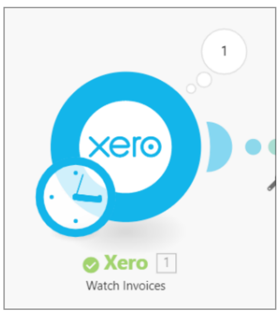
3. Click on Xero and select the "Watch Invoices" trigger.
4. Select or add your Xero connection and select the appropriate Organization.
5. Select the start as required.
6. Search for the Flow Control module and select Iterator.
7. Click OK – leaving the Array field empty
8. Add a new module to the Iterator 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:



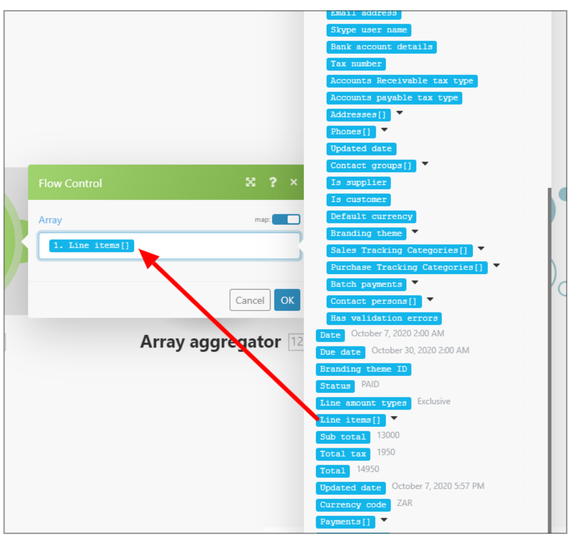
14. Scroll to the bottom and limit the query to 1 and click OK.
15. Add a new module and select 1CRM, then select Create a Record.
16. Select your 1CRM connection and select Invoice as the Module.
17. Map the Invoice field in the 1CRM module, leaving the Line items field blank for now, we will return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



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:

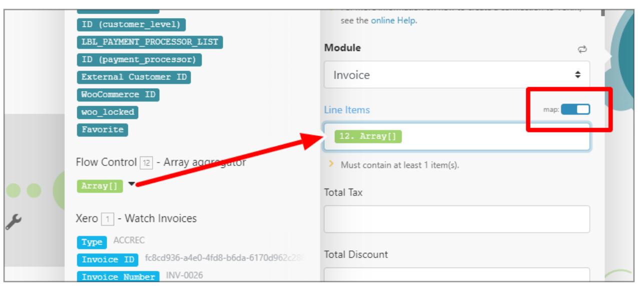


21. Now click on the Iterator module and select Line Items as the Array:

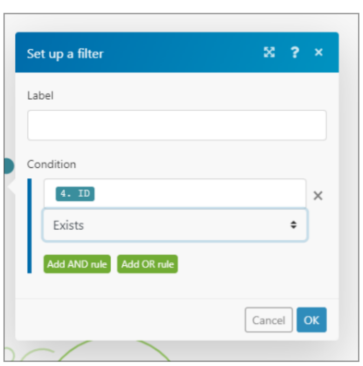


22. Click OK and enter the Array aggregator module.
23. Select Line Items as the Target structure type.
24. You can now map the line item fields from the Iterator module:

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:



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:



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:

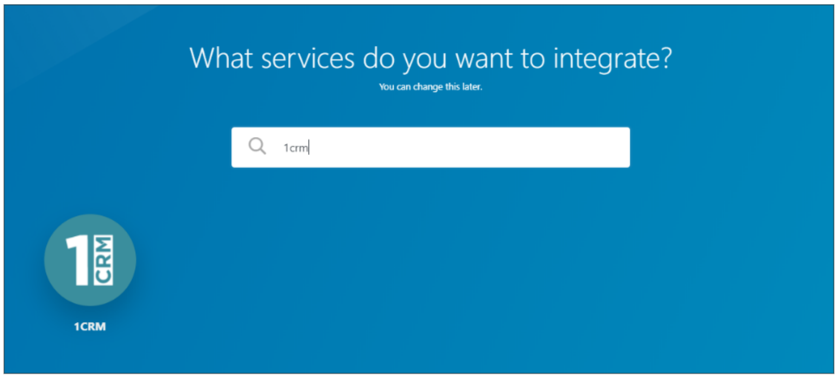
31. The setup is now complete, and invoices will be created from Xero to 1CRM.

2.5 Syncing Quotes from 1CRM to Xero

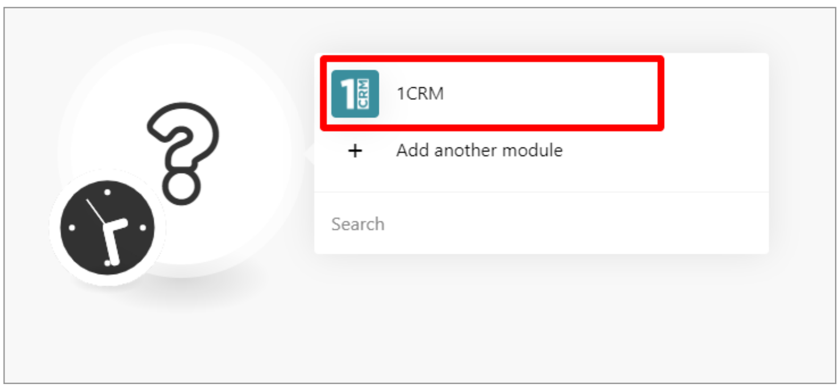
1. The same process for syncing Invoices from 1CRM to Xero can be followed to sync Quotes from 1CRM to Xero, however Integrated ID is not required for this integration. So the final step to update the Quote in 1CRM is not required and of course be sure to select the Quote module instead of the Invoice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

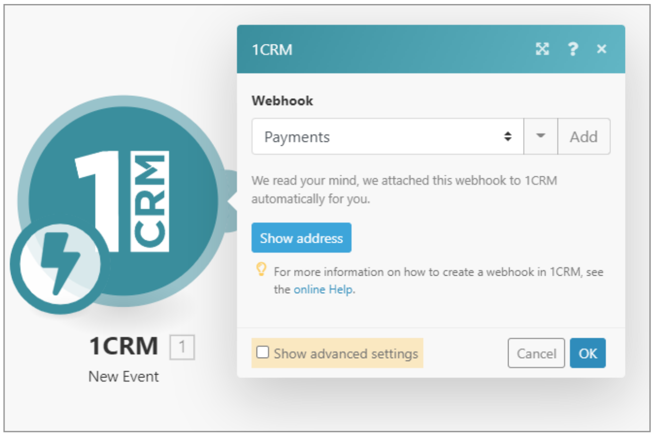


3. Click on the 1CRM app and select New Event



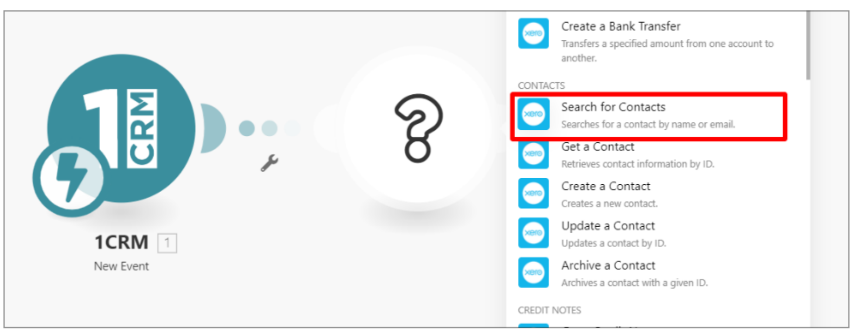
4. A webhooks selection will appear, click on Add:

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.

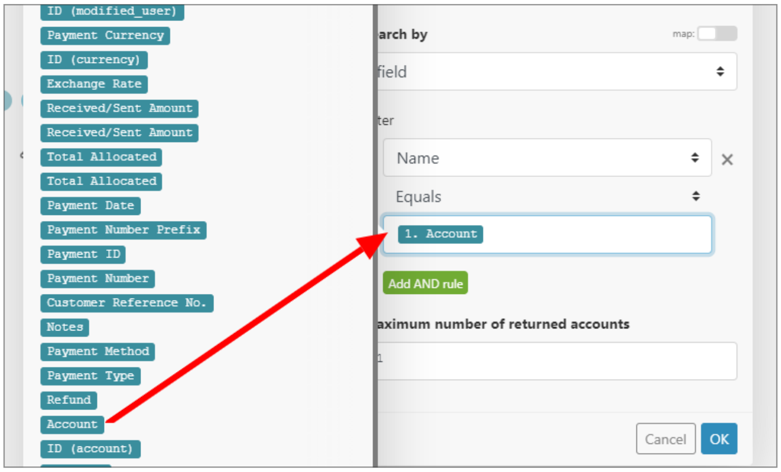


11. Add another module to the scenario:

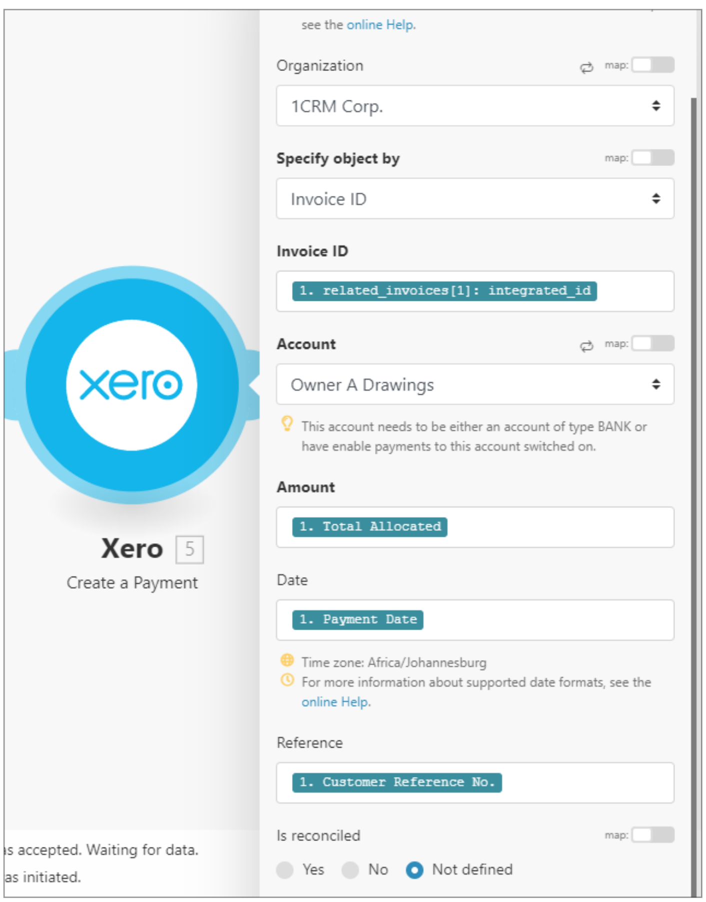
12. Search and select the Xero module, then search and select Search for Contacts:



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:



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:



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.

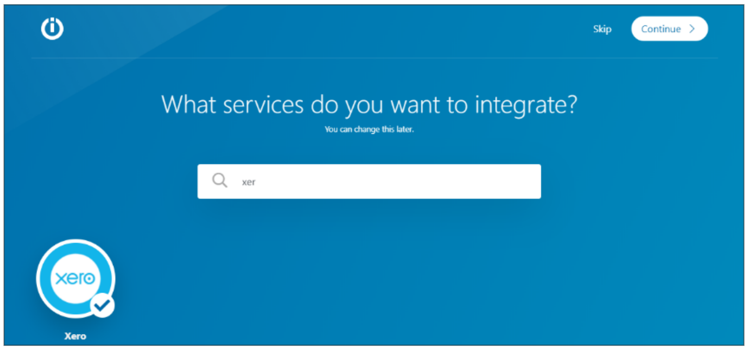
20. Add an error handler to the Search for Contacts module by right clicking on the module:

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

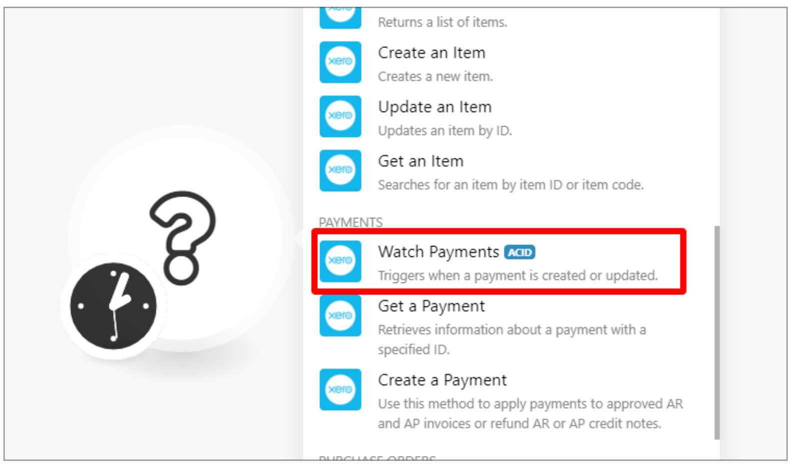
23. The setup is now complete, and Payments will be created from 1CRM to Xero.

2.7 Syncing Payments from Xero to 1CRM

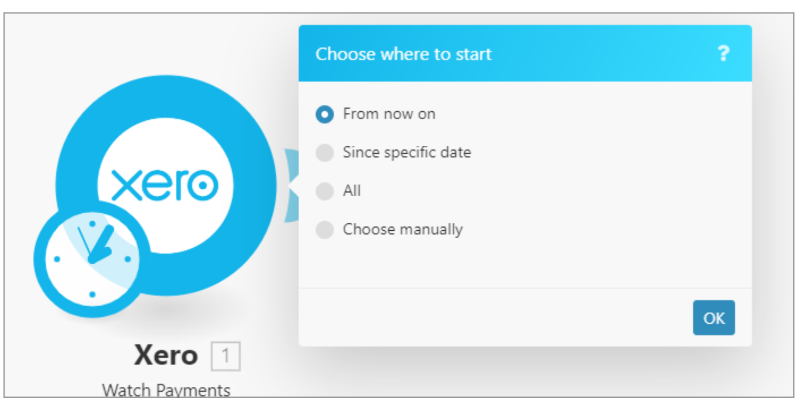
1. Login to your Integromat account and create a new Scenario.
2. Search and Select Xero as the service to integrate and continue.



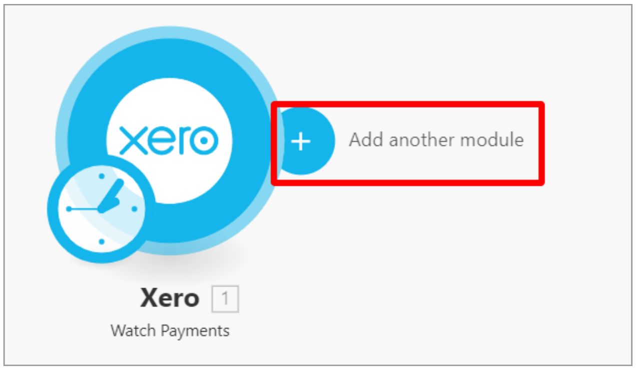
3. Click on the Xero app and select Watch Payments



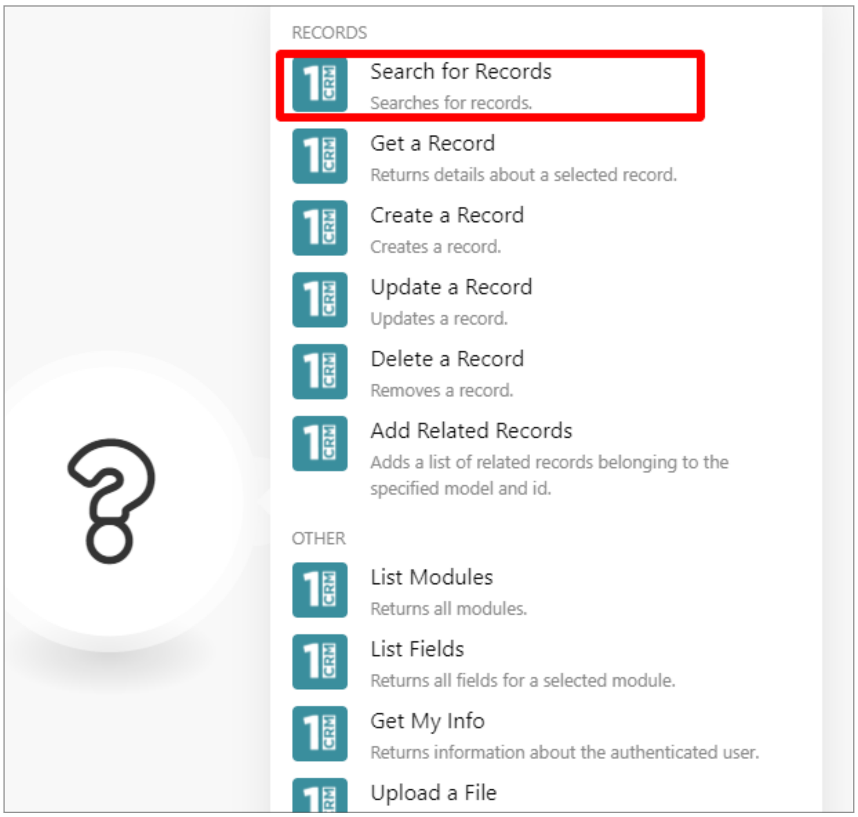
4. Select your connected Xero account and Organization.
5. Choose when the sync should start:



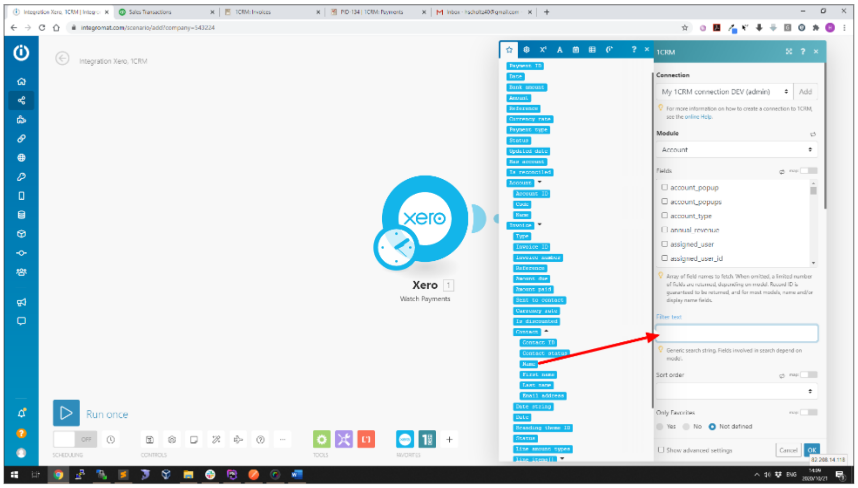
6. Add another module to the scenario:



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

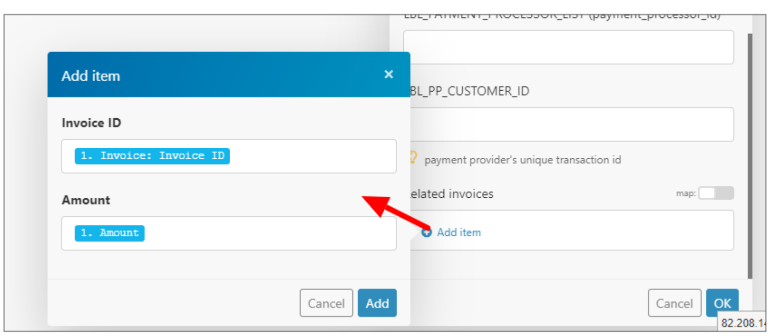


8. Select your connected 1CRM account – Or connect your 1CRM account if you have not already done so.
9. Select Account as the module.
10. Map the Contact Name from the Xero fields to the Filter text field:



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:

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



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

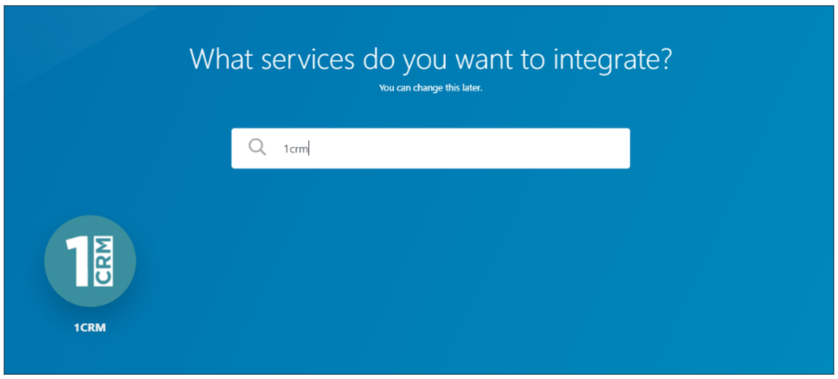
17. Select Ignore as the Directive.
18. Save and Enable the scenario:

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

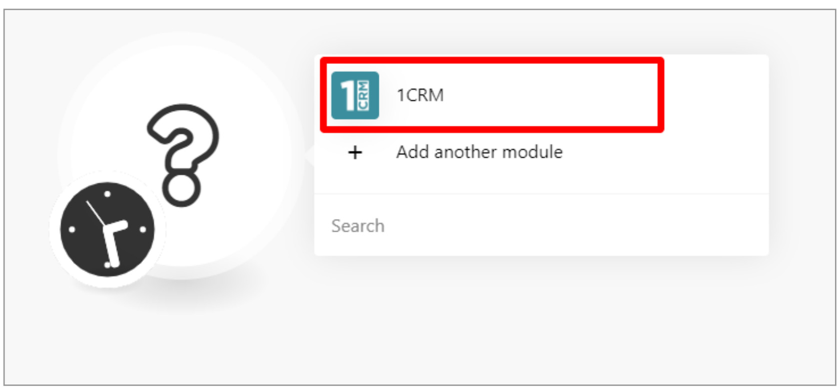
3.0 Integrating with Quickbooks

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:

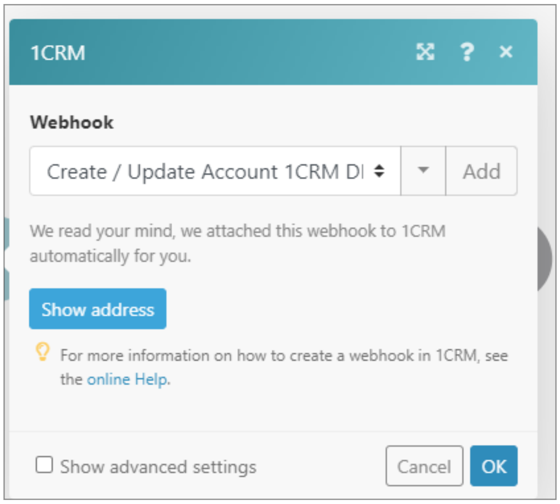


3. Click on the 1CRM app and select New Event



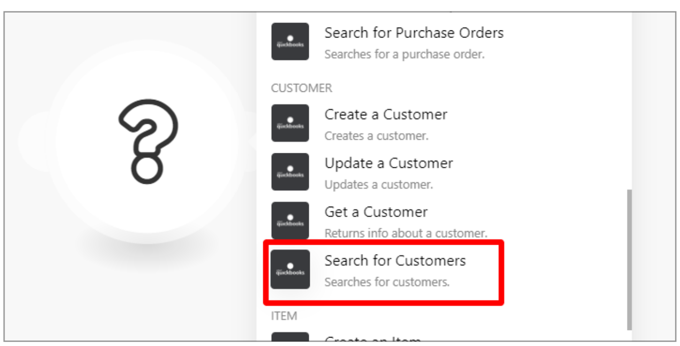
4. A webhooks selection will appear, click on Add:

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.

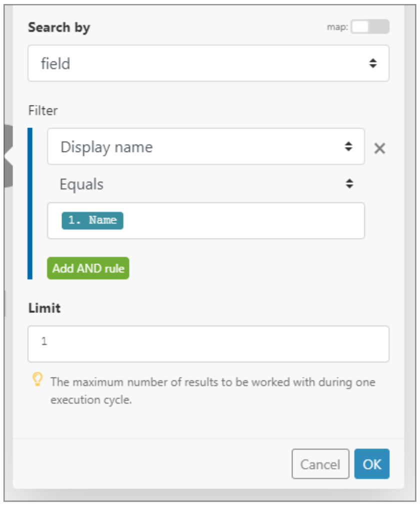


11. Select the webhook and click OK.
12. Add another module to the scenario:

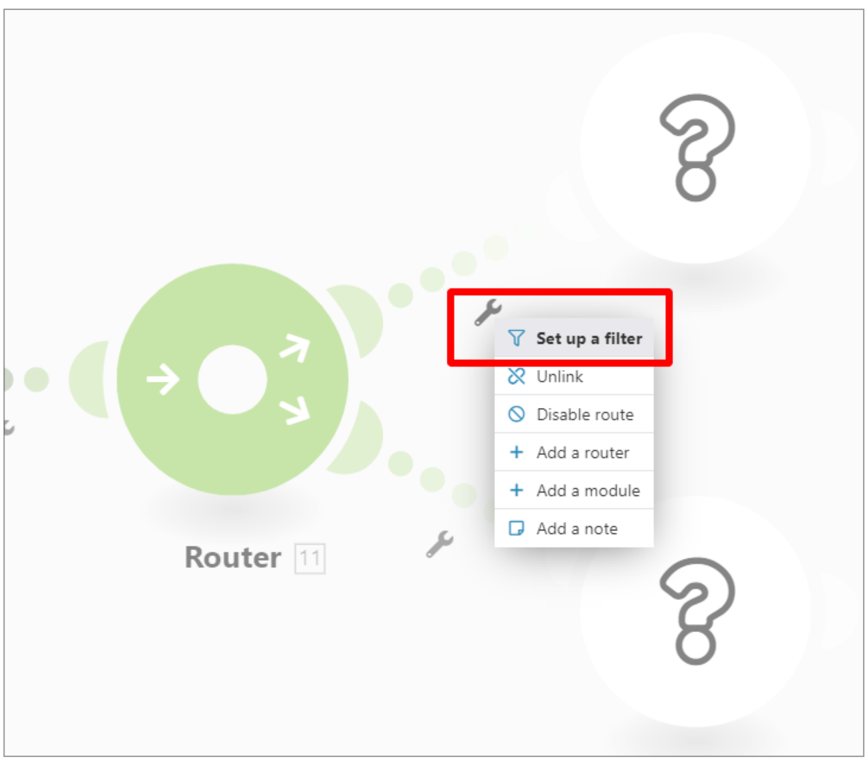
13. Search and select the Quickbooks module, then search and select Search for Customers:



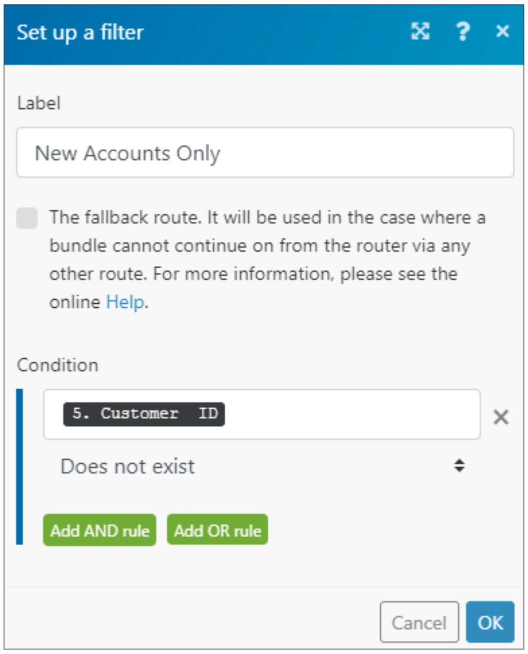
14. Select your connected Quickbooks account – Or connect your Quickbooks account if you have not already done so.
15. Select “field” as the Search By option.
16. Select “Display Name” as the filter, select Name as the filter value and set the limit to 1:



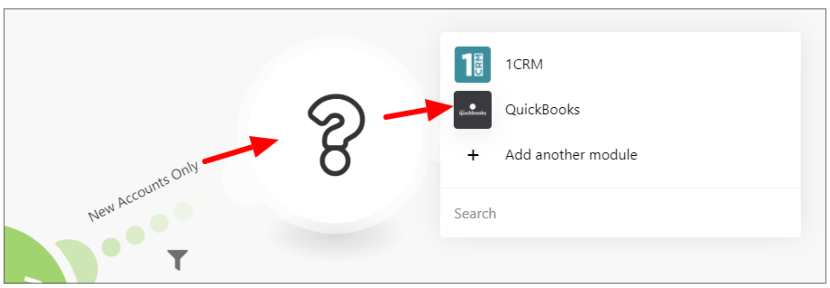
17. Add another module as in step 12, and search for Flow Control, then select Router within the Flow Control module.
18. The router will be added with two blank modules linked to it. These modules will be used to Create and Update accounts. If you choose to only Create or Update accounts, you can remove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



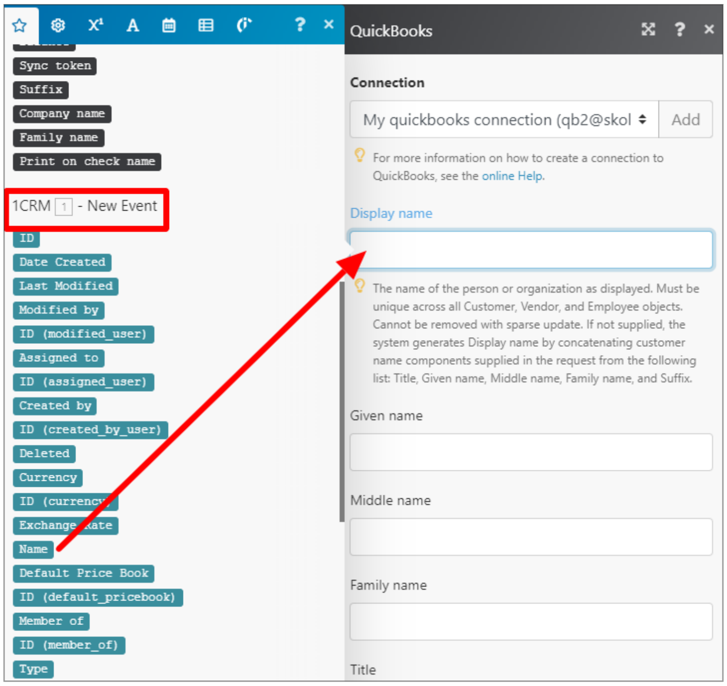
20. Create the condition as shown below:



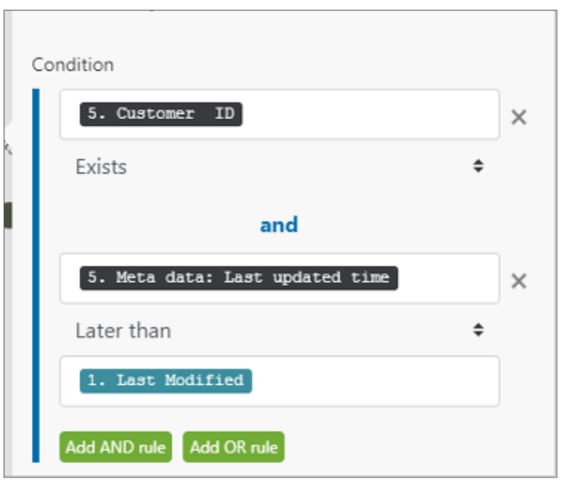
21. Click OK and select the empty module after the filter, select Quickbooks:



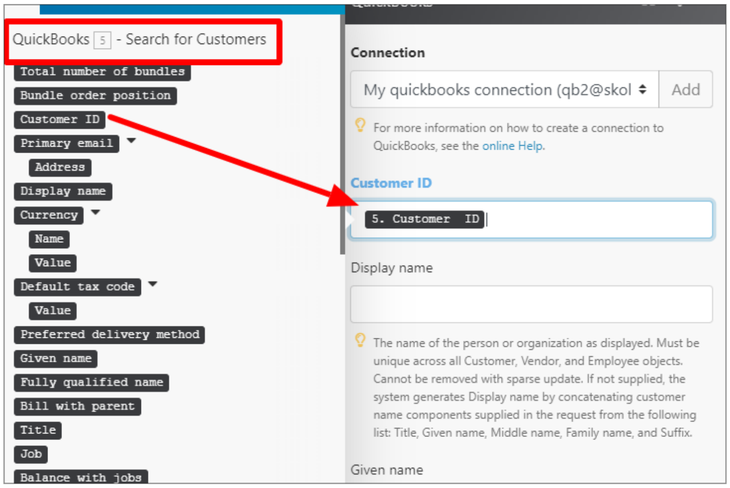
22. Now select the Create a Customer action.
23. If you have not set up a Quickbooks Connection, you can do so now by adding a connection.
24. You can now map the fields from 1CRM to the Quickbooks Customer:



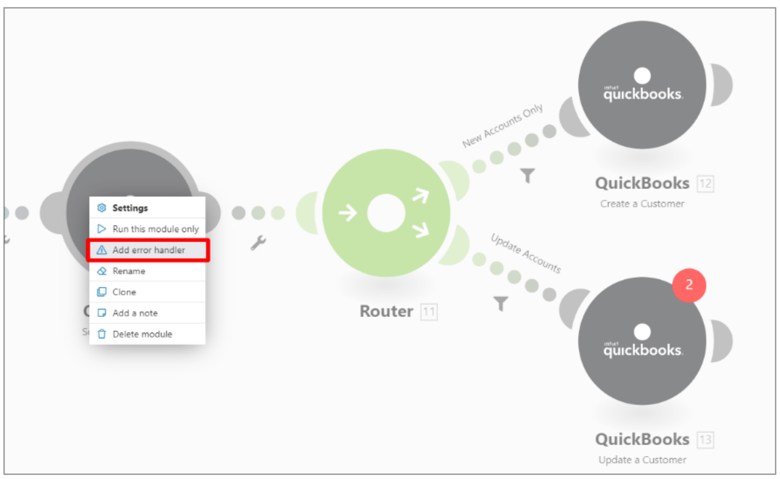
25. Once all fields are mapped, click OK.
26. Set up the filter to allow the system to Update accounts that already exist in Quickbooks by adding a filter to the remaining blank module.
27. Configure the filter as shown below:



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:



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:

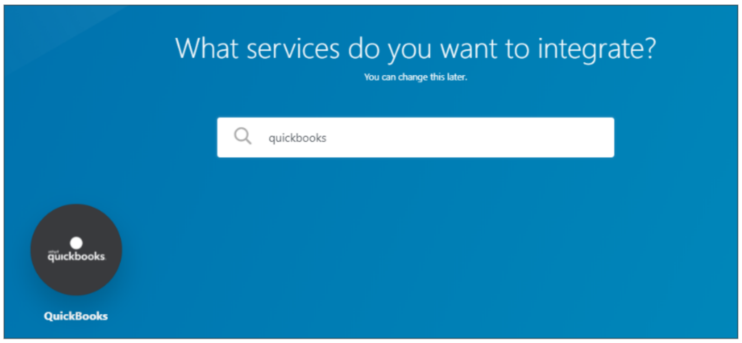


33. Select Ignore as the Directive.
34. Save and Enable the scenario:

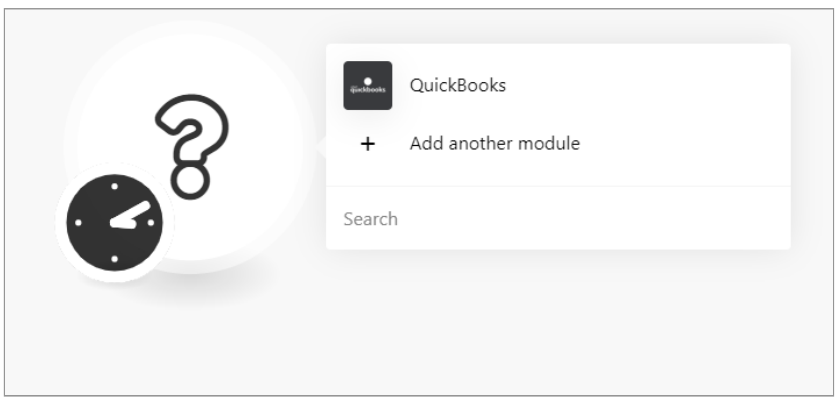
35. The setup is now complete, and accounts will be created and updated from 1CRM to Quickbooks.

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:

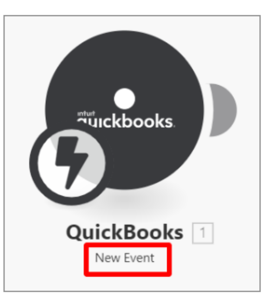


3. Click on the Quickbooks app and select New Event

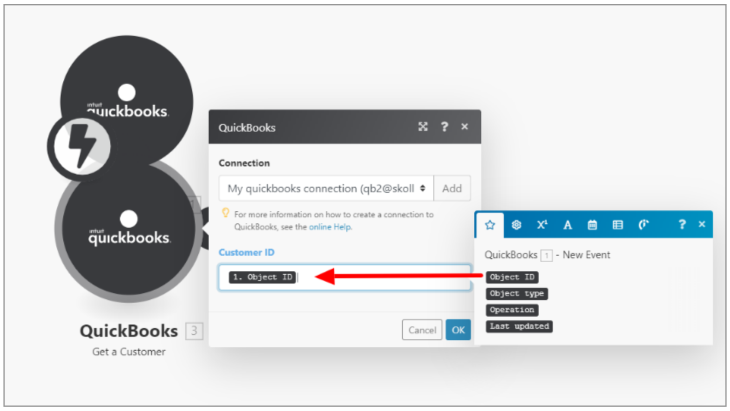


4. A webhooks selection will appear, click on Add:

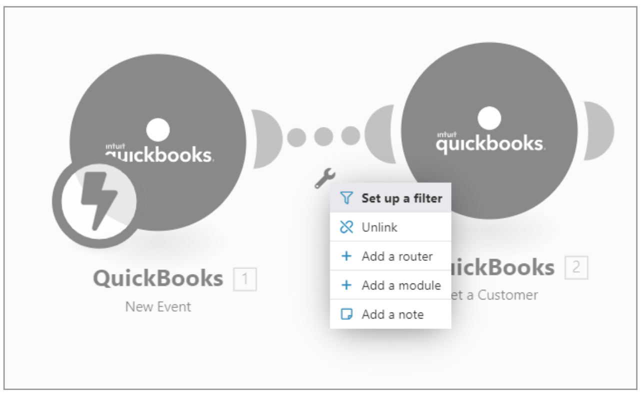
5. Enter a name for the Webhook (if you have already created a webhook for Quickbooks, select the webhook), select the appropriate Quickbooks accounts and click on Connect.
6. Make sure the webhook is selected and click OK.
7. Double Click on New Event:



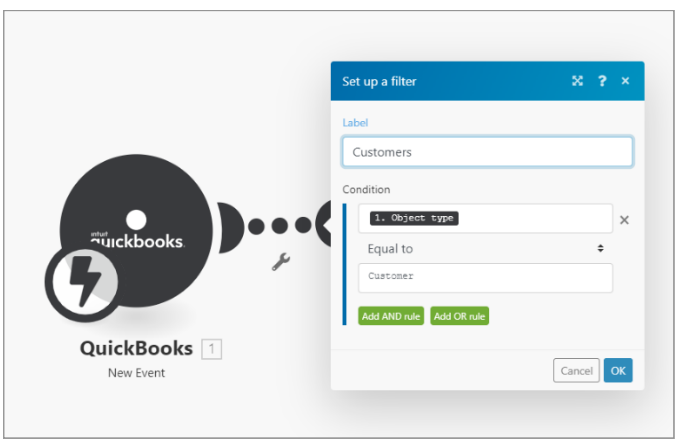
8. Click on the new event and select Quickbooks as the new module.
9. Select Get a Customer as the action.
10. Make sure your connection is selected and select the Object ID as the Customer ID:



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

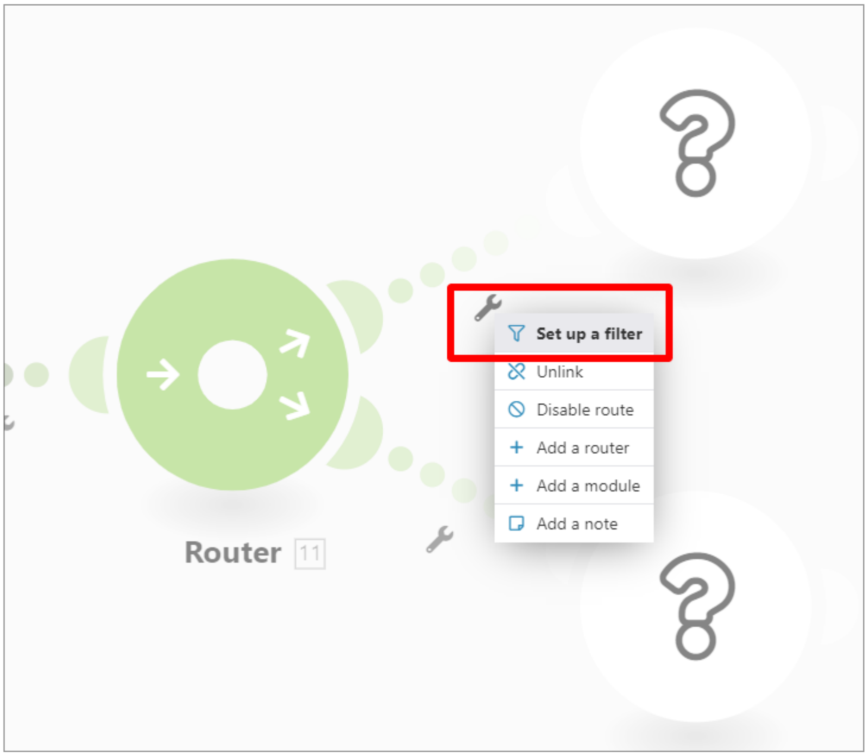


12. Configure the filter as shown below:

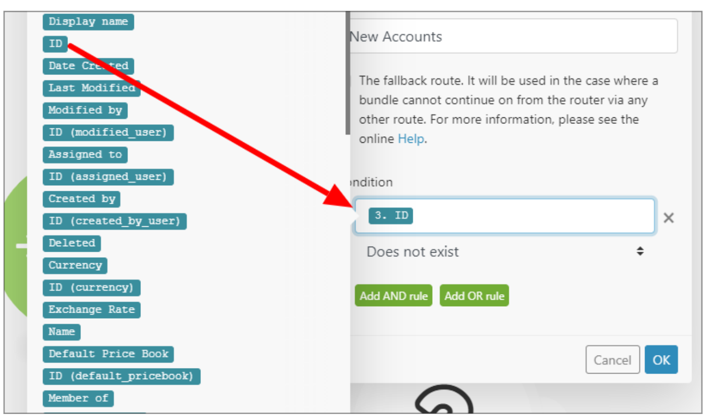


13. Click OK, then add another module.
14. Search and select 1CRM and select Search for Records.
15. Select Account as the Module and map the Display Name to the Filter text field.
16. Click OK.

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:

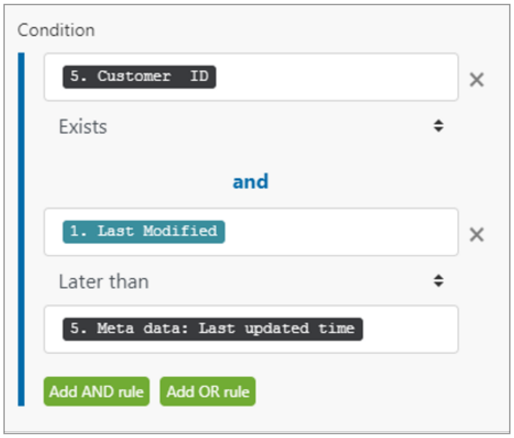


20. Create the condition as shown below:

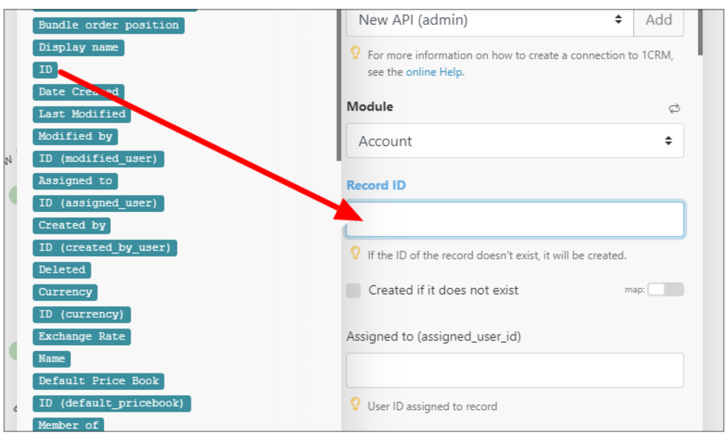


21. Click OK and select the empty module after the filter, select 1CRM.
22. Now select the Create a Record action.
23. Select your 1CRM connection - If you have not set up a 1CRM Connection, you can do so now by adding a connection.
24. Select Account as the Module.

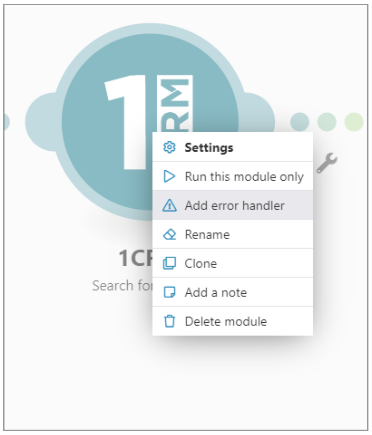
25. You can now map the fields from Quickbooks to the 1CRM Account.
26. Once all fields are mapped, click OK.
27. Set up the filter to allow the system to Update accounts that already exist in 1CRM by adding a filter to the remaining blank module.
28. Configure the filter as shown below:



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:



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:

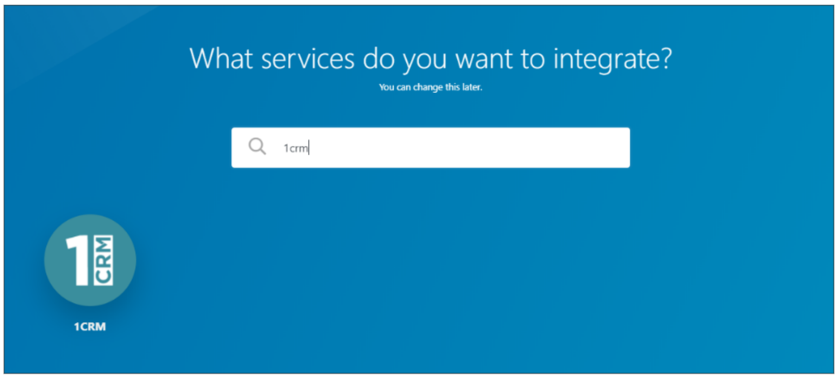


35. Select Ignore as the Directive.
36. Save and Enable the scenario:

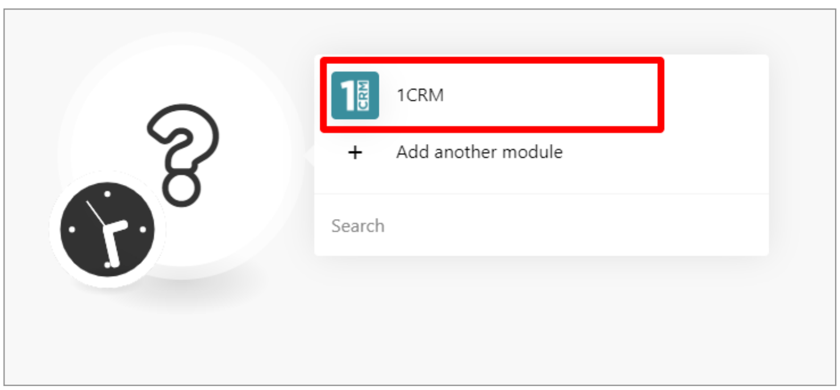
37. The setup is now complete, and accounts will be created and updated from Quickbooks to 1CRM.

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:



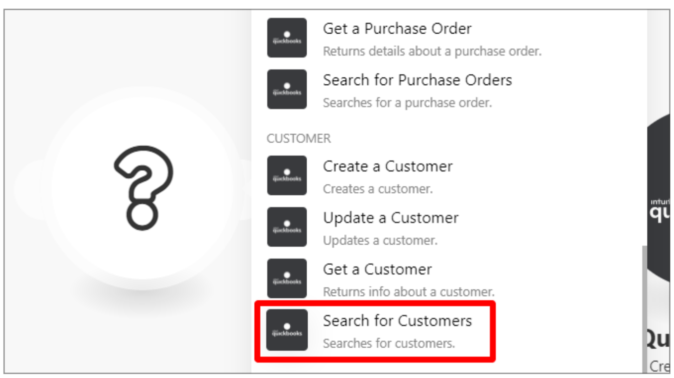
3. Click on the 1CRM app and select New Event



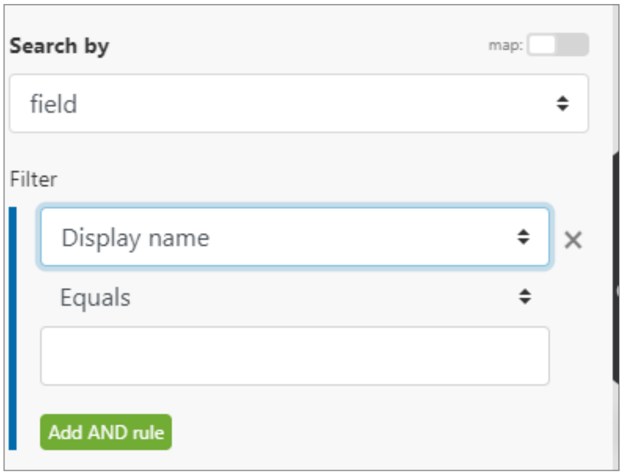
4. A webhooks selection will appear, click on Add:

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:

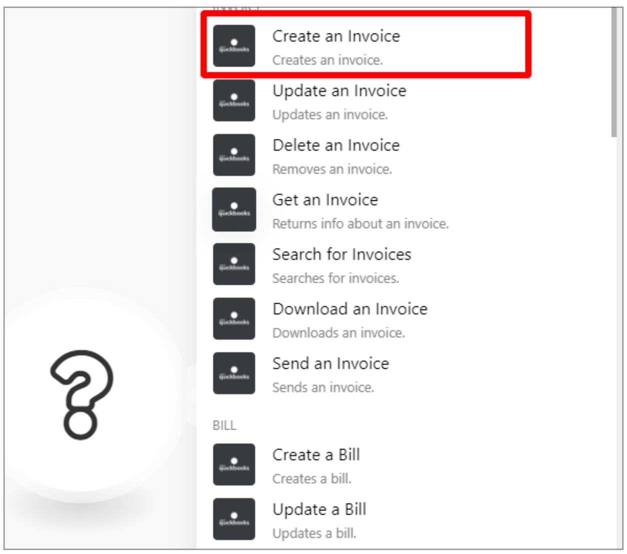
12. Search for the Flow Control module and select Iterator.
13. Click OK – leaving the Array field empty
14. Add a new module to the Iterator and again search for Flow Control, then selecting Array aggregator.
15. Select Iterator as the source module and click OK.
16. Add another module and search and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



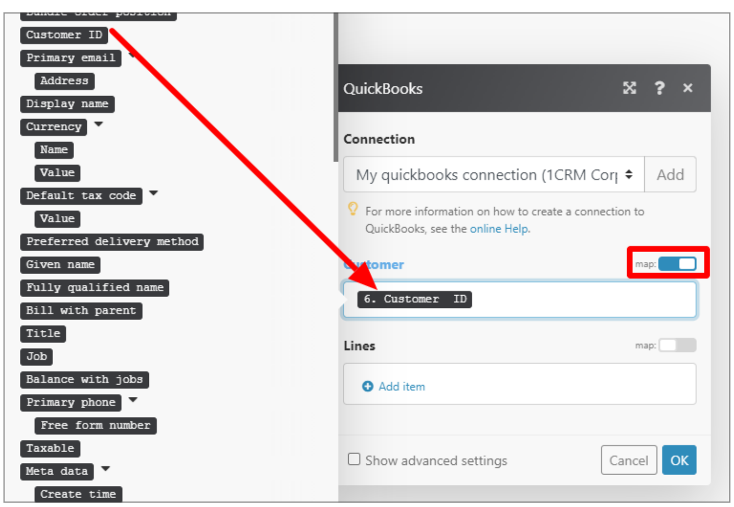
17. Select your connected Quickbooks account – Or connect your Quickbooks account if you have not already done so.
18. Select “field” as the Search By option.
19. Select “Display Name” as the filter, select Billing Account as the filter value and set the limit to 1:



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



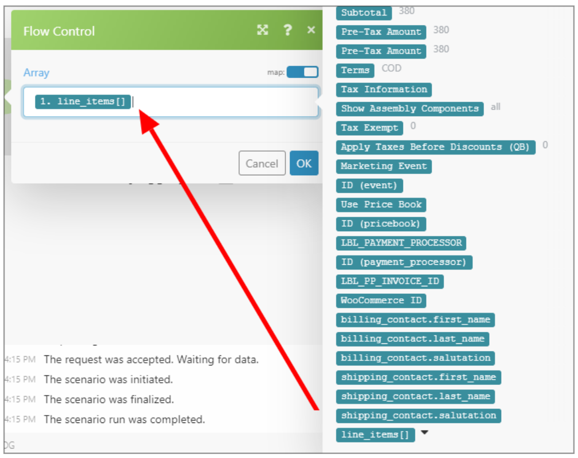
22. Map the Customer field to the Customer ID retrieved from the Search for Contacts module:



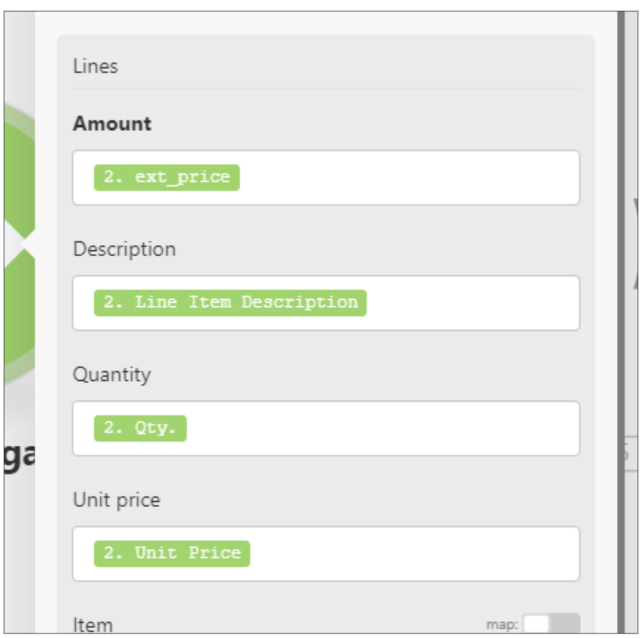
23. Click OK (We will return to this module to map the rest of the fields).

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:

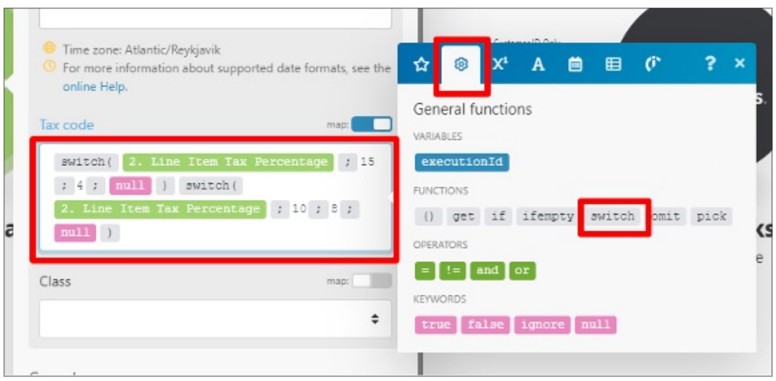


27. Click OK and enter the Array aggregator module.
28. Select Line Items as the Target structure type.
29. You can now map the line item fields from the Iterator module:



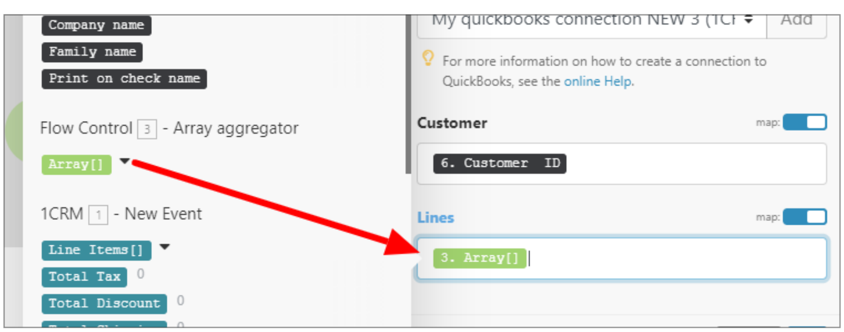
30. Line item tax codes now should be configured by setting a single default tax code (Step 31), or by mapping multiple tax codes (Step 32). To get your Quickbooks tax code ID's, please follow this link: https://www.1crm.com/qb/auth.php
31. Setting up a default tax code for all line items (Simple configuration)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

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:

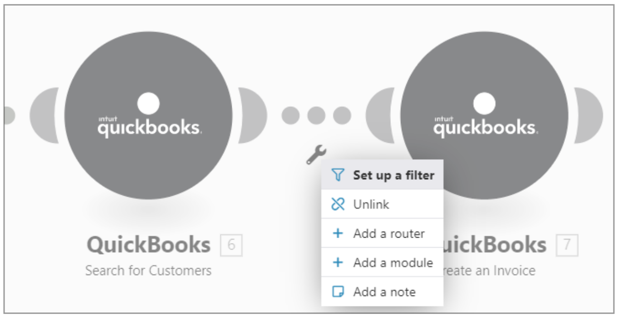


    iii. You can now set up conditional tax codes. The left hand side of the above image is an example of this. The meaning of this is as follows: If the Line item tax percentage from 1CRM is 15%, then the tax code ID 4 will be used, and if the tax percentage is 10%, tax code ID 8 will be used in Quickbooks, the null option at the end is to prevent a value if the switch is not true.

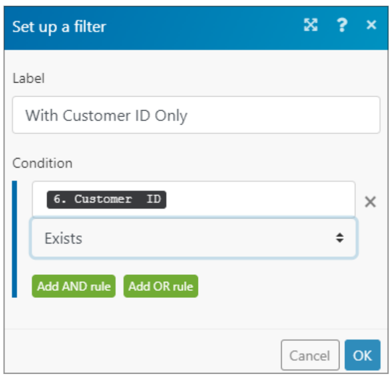
33. Once all line item fields are mapped, return to the Quickbooks – Create an Invoice module.
34. At the Lines field, enable "map" and map this to the Array[] field as shown below:



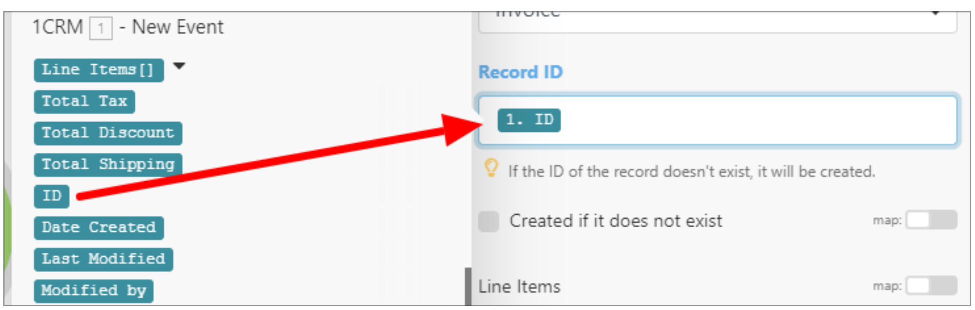
35. Click on Show advanced settings to display all available Quickbooks fields and map them as required.
36. Once all the fields are mapped, add a filter to only allow invoices to be created if a Customer ID is present. Click on the settings icon between Search for Customers and Create an Invoice:

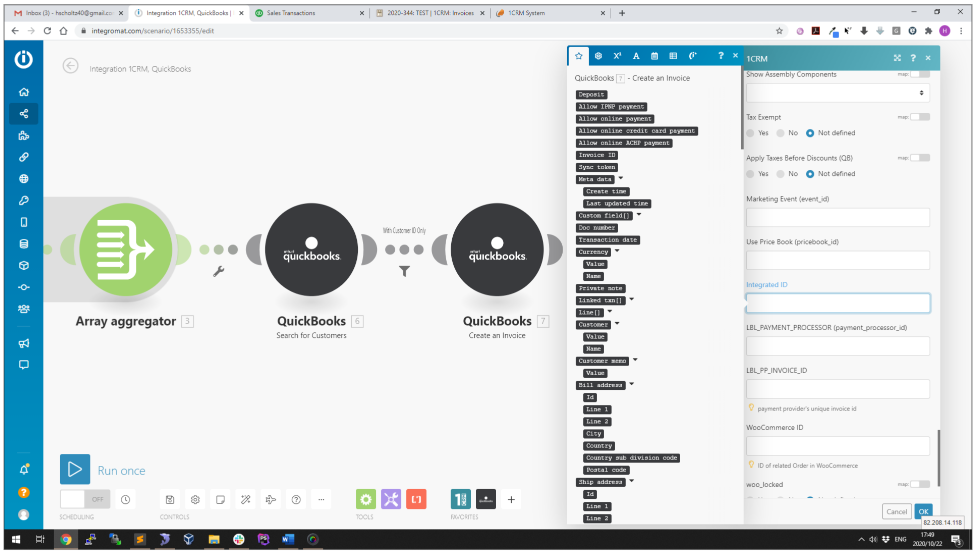


37. Set up the filter as shown below:

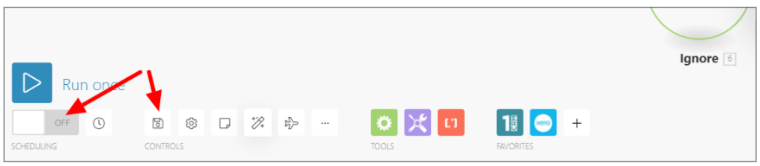


38. Add another module after the Create an Invoice module from Quickbooks.
39. Select 1CRM, then Update a Record.
40. Select Invoice as the Module, then map the ID field from the original 1CRM invoice to the Record ID field and map the Quickbooks Invoice ID field to the Integrated ID field:





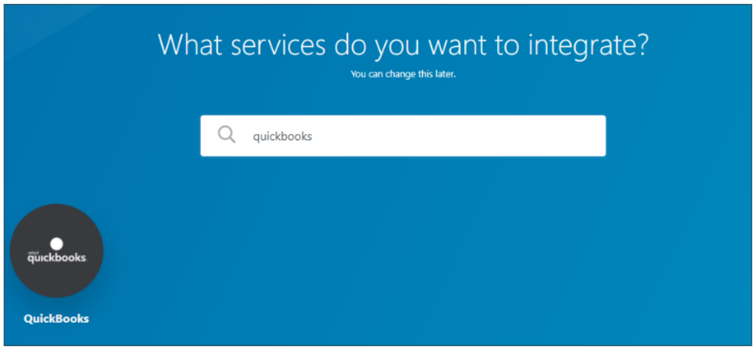
41. Click OK and Save and Enable the scenario:



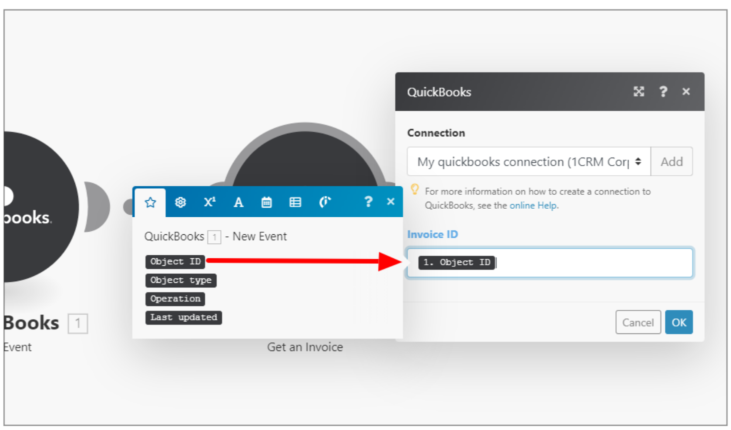
42. The setup is now complete, and invoices will be created from 1CRM to Quickbooks.

3.4 Syncing Invoices from Quickbooks to 1CRM

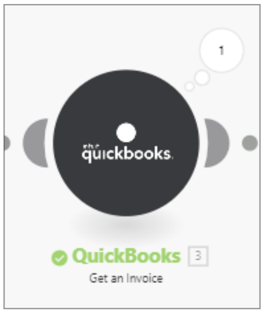
1. Login to your Integromat account and create a new Scenario.
2. Search and select Quickbooks as the service to integrate and continue:



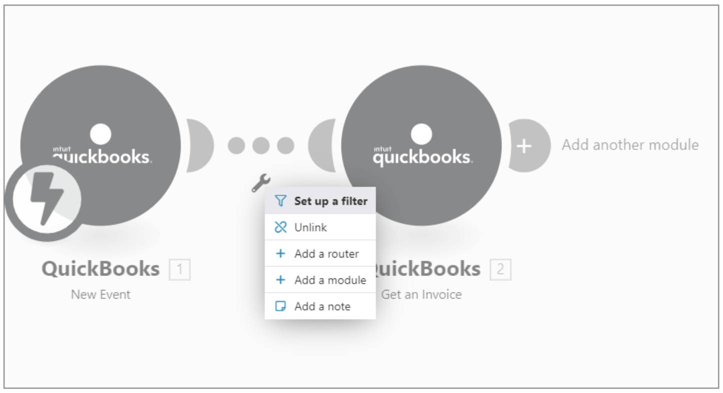
3. Click on Quickbooks and select the “New Event” trigger.
4. If you already have an active Webhook set up, select it, or add a new Webhook for Quickbooks.
5. Add a new module and select Quickbooks.
6. Select Get an Invoice.
7. Map the Object ID field to the Invoice ID:



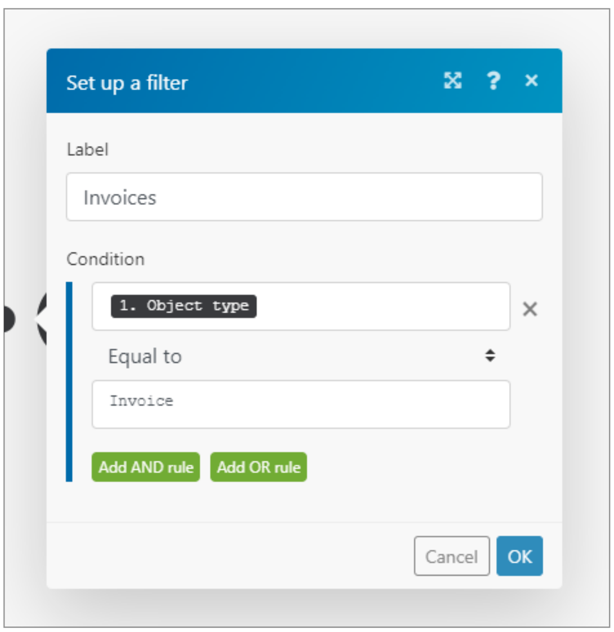
8. Enter your Quickbooks instance and edit an invoice, make sure that the invoice you open in Quickbooks has the necessary features required for the integration such as Discounts, Taxes, etc.
9. Check the URL of the invoice opened in Quickbooks, you will find a parameter in the URL named txnId, copy 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:



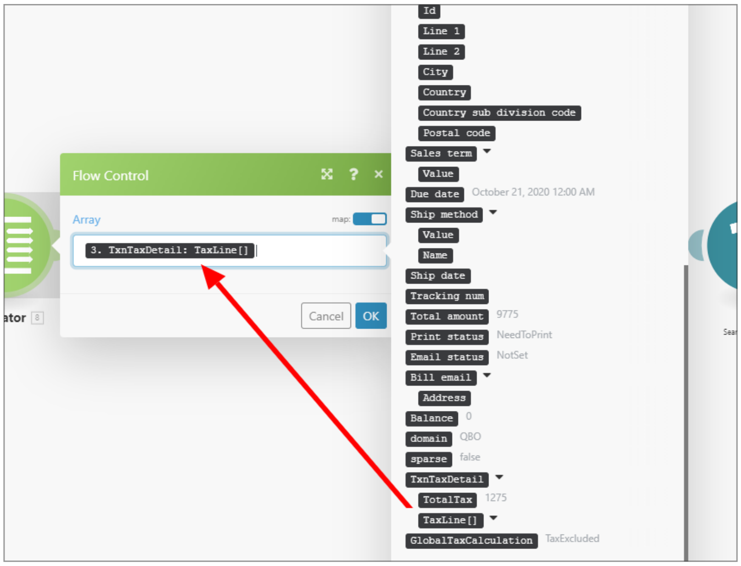
13. Set up a new filter between the two modules:



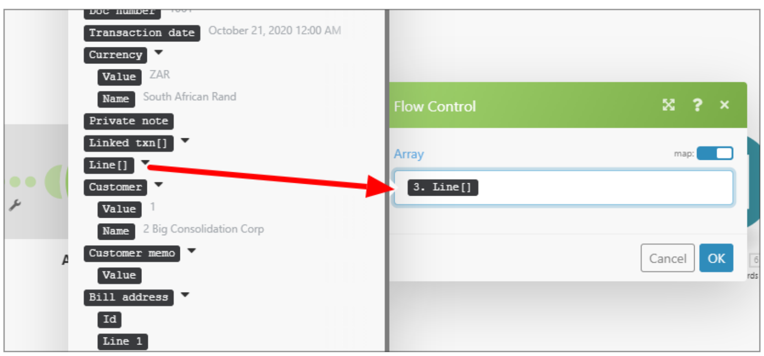
14. Configure the filter as shown below:



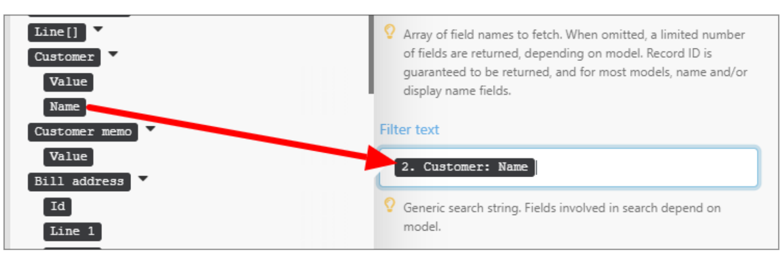
15. Click OK and add a new Module.
16. Search for the Flow Control module and select Iterator.
17. Map the TaxLine field to the array, see below:



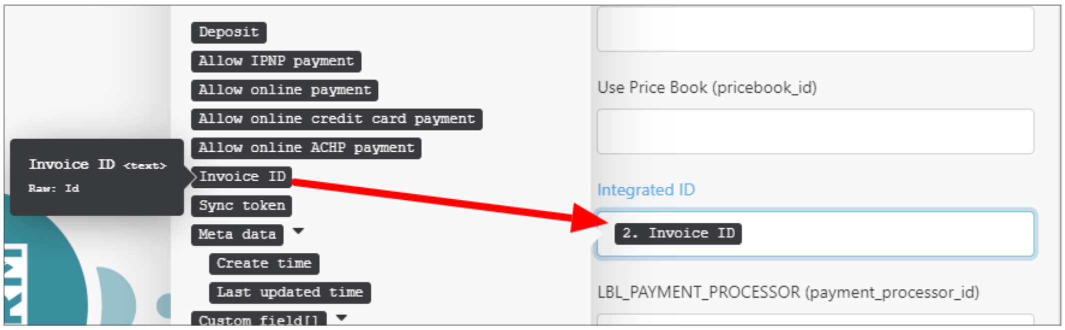
18. Click OK and add a new module to the Iterator and again search for Flow Control, then selecting Array aggregator.
19. Select Iterator as the source module and click OK.
20. Add a new module, again selecting the Flow Control > Iterator module.
21. Map the Line array field to the Array field:



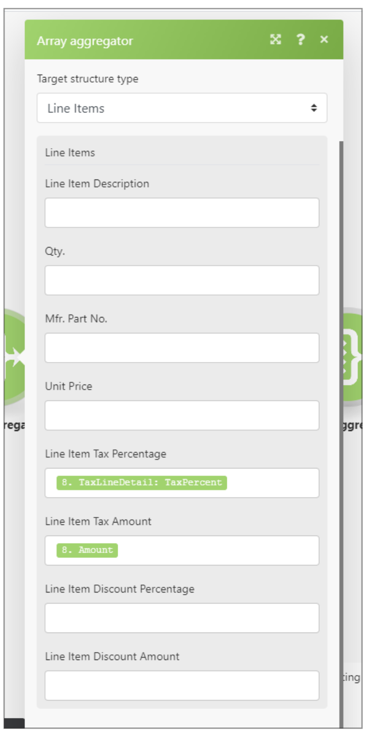
22. Click OK and add a new module to the Iterator and again search for Flow Control, then selecting Array aggregator.
23. Select Iterator as the source module and click OK.
24. Add a new module and search and select 1CRM.
25. Select Search for Records.
26. Select your 1CRM connection and select the Account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



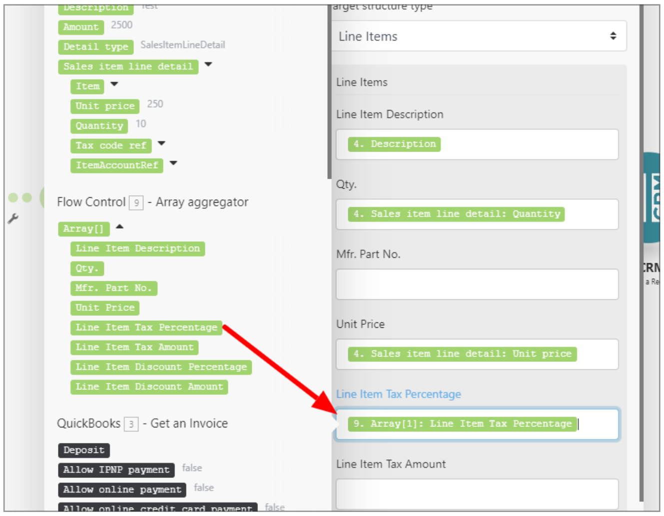
28. Scroll to the bottom and limit the query to 1 and click OK.
29. Add a new module and select 1CRM, then select Create a Record.
30. Select your 1CRM connection and select Invoice as the Module.
31. Map the Invoice field in the 1CRM module, leaving the Line items field blank for now, we will return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



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:

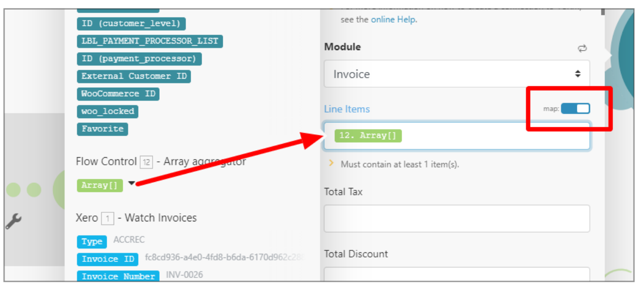


36. Click OK and enter the second Array Aggregator module.
37. Again, select Line Items as the Target structure type.
38. Map the rest of the Line item fields as required, note that the Line Item tax information must be mapped from the previous array we created

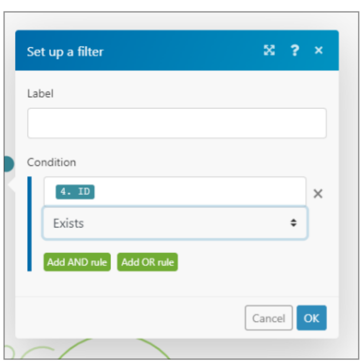


Note: Only add the Tax percentage OR amount, do not enter both values.

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:



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:



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:

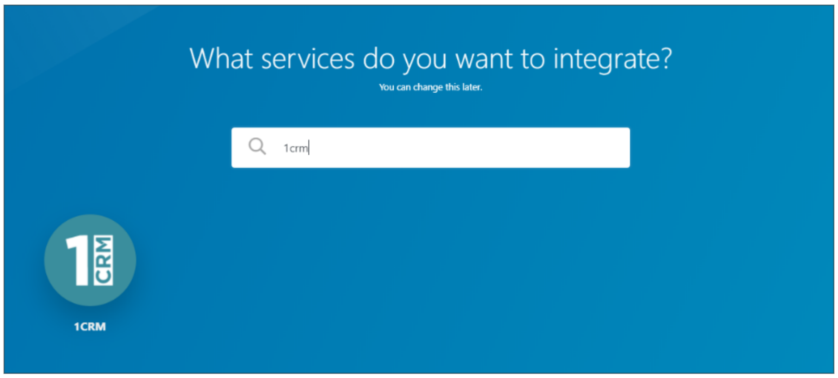
45. The setup is now complete, and invoices will be created from Quickbooks to 1CRM.

3.5 Syncing Quotes between 1CRM and Quickbooks Online

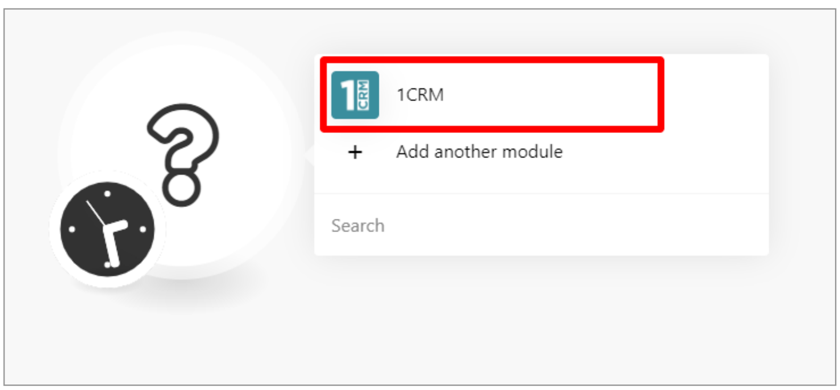
1. The same process for Invoices can be followed to sync Quotes to and from1CRM, however, Integrated ID is not required for this integration and of course, be sure to select the Quote module instead of the Invoice module where applicable.

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.

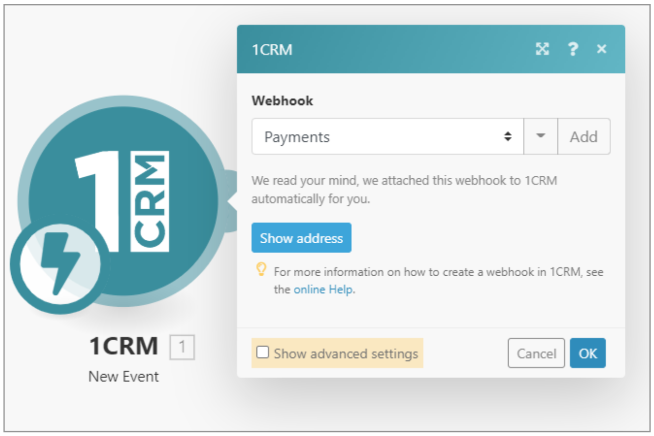


3. Click on the 1CRM app and select New Event



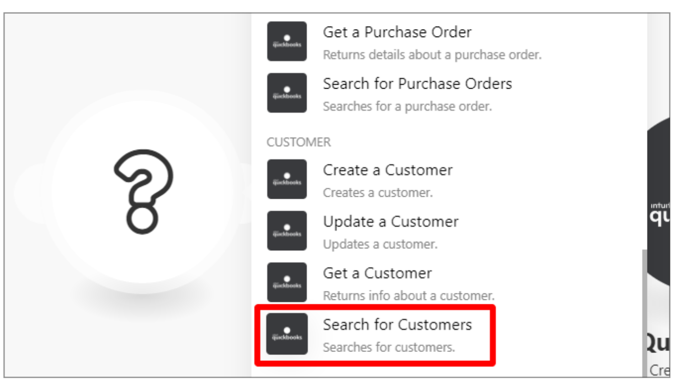
4. A webhooks selection will appear, click on Add:

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.



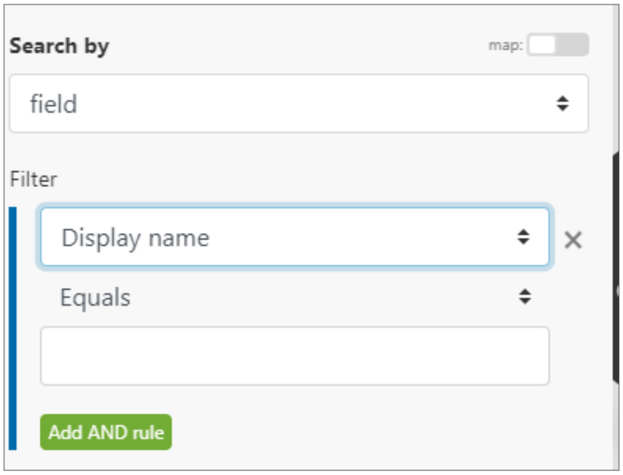
11. Add another module to the scenario:

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:

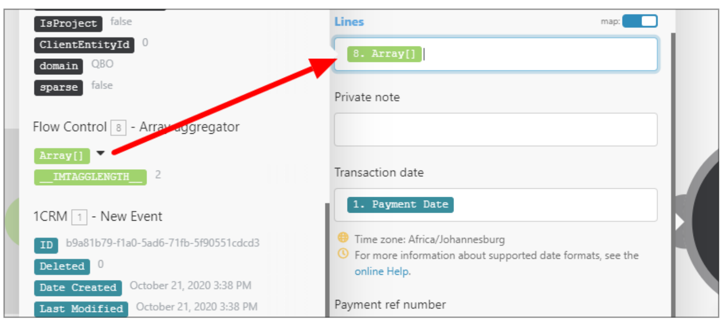


18. Select your connected Quickbooks account – Or connect your Quickbooks account if you have not already done so.

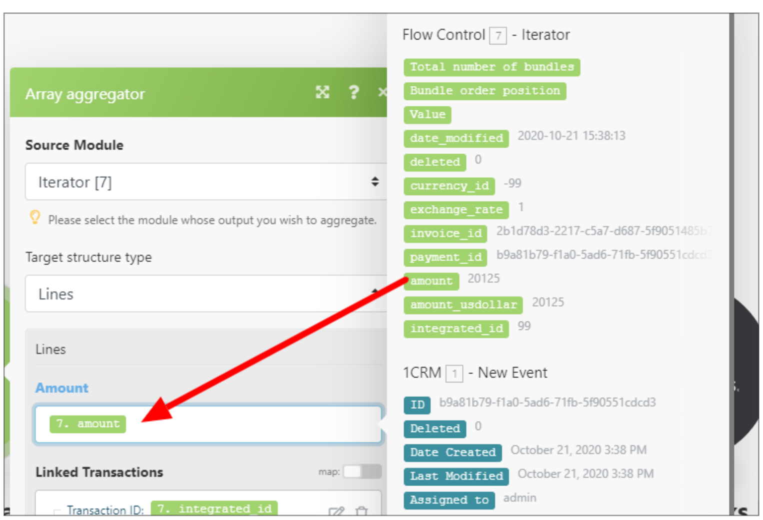
19. Select “field” as the Search By option.
20. Select “Display Name” as the filter, select Account as the filter value and set the limit to 1:



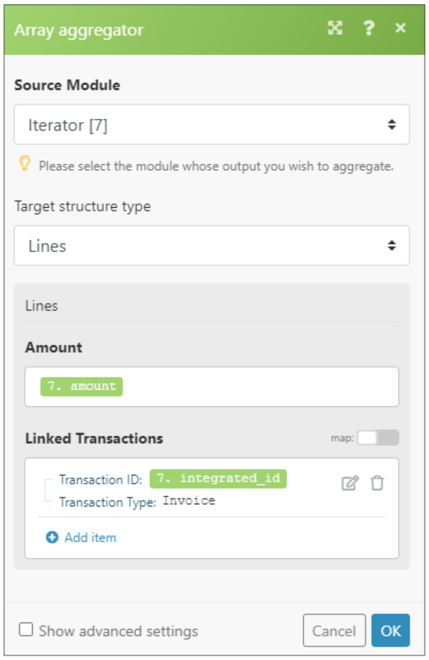
21. Add another module to the Search for Customers module and select Quickbooks.
22. Select Create a Payment.
23. Map the fields as required, map the array[] field to the Lines field:



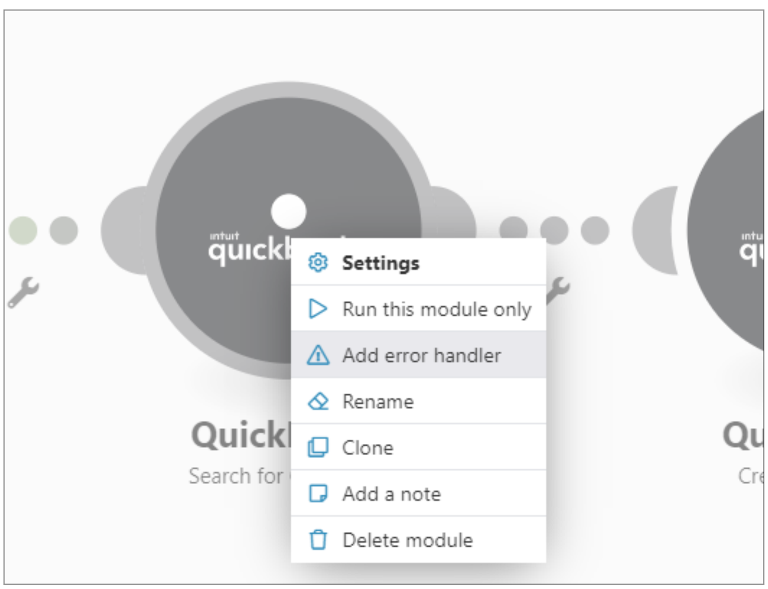
24. Once all field are mapped, click OK and return to the Array aggregator module.
25. Select Lines as the Target structure type.
26. Map the amount field from the Iterator:



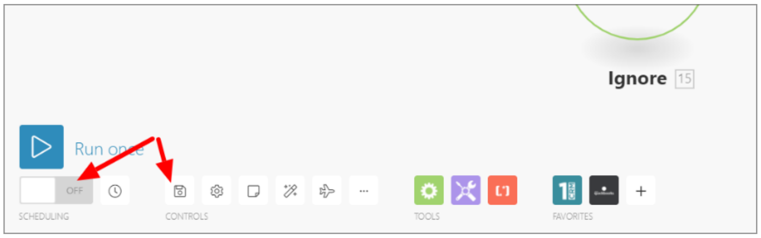
27. Click on Add item at Linked Transactions.
28. Map the integrated_id field to the Transaction ID and select Invoice as the Transaction Type, then click Add and OK. The setup should look like the screenshot below:



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



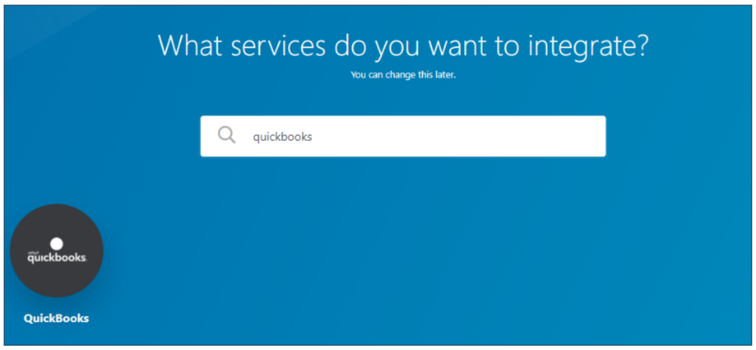
30. Select Ignore as the Directive.
31. Save and Enable the scenario:



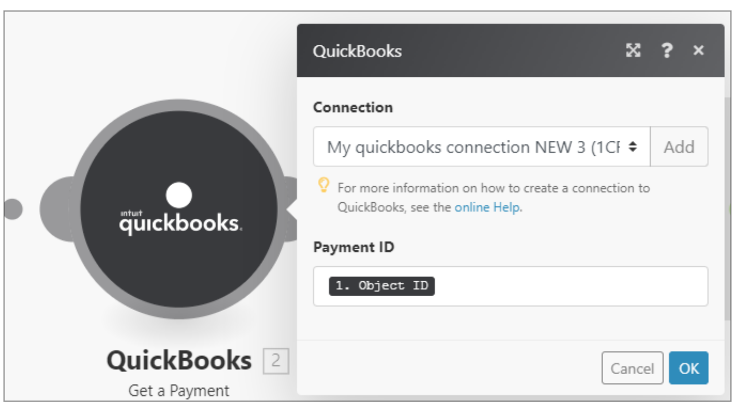
32. The setup is now complete, and Payments will be created from 1CRM to Quickbooks.

3.7 Syncing Payments from Quickbooks to 1CRM

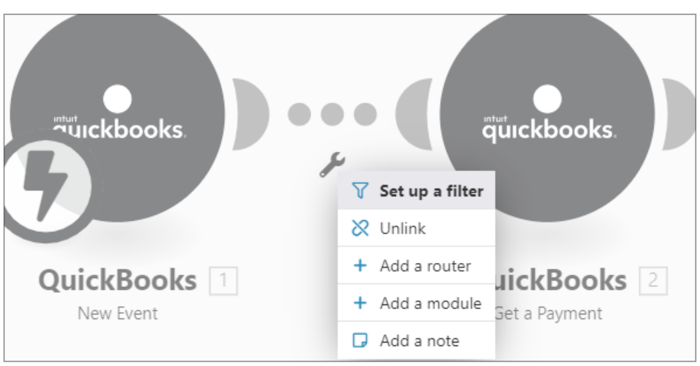
1. Login to your Integromat account and create a new Scenario.
2. Search and select Quickbooks as the service to integrate and continue:



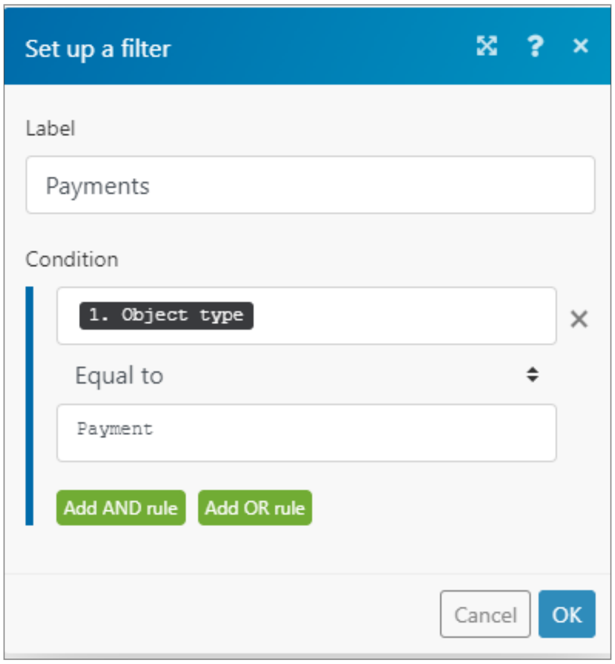
3. Click on Quickbooks and select the "New Event" trigger.
4. If you already have an active Webhook set up, select it, or add a new Webhook for Quickbooks.
5. Add a new module and select Quickbooks.
6. Select Get a Payment.
7. Map the Object ID field to the Payment ID:



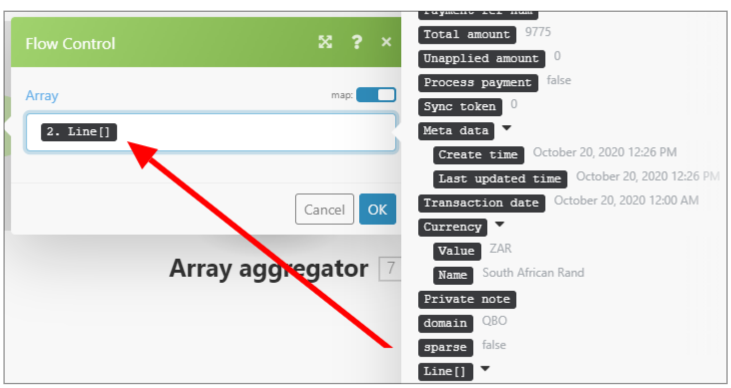
8. Set up a new filter between the two modules:



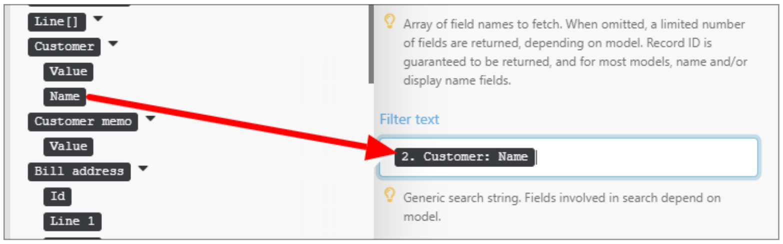
9. Configure the filter as shown below:



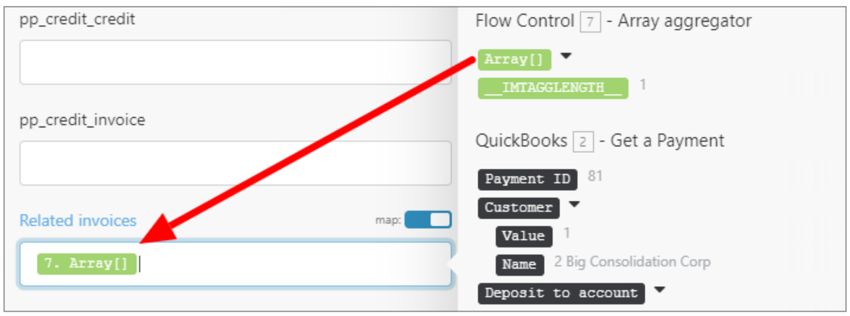
10. Click OK and add a new Module.
11. Search for the Flow Control module and select Iterator.
12. Map the Line[] field to the array, see below:



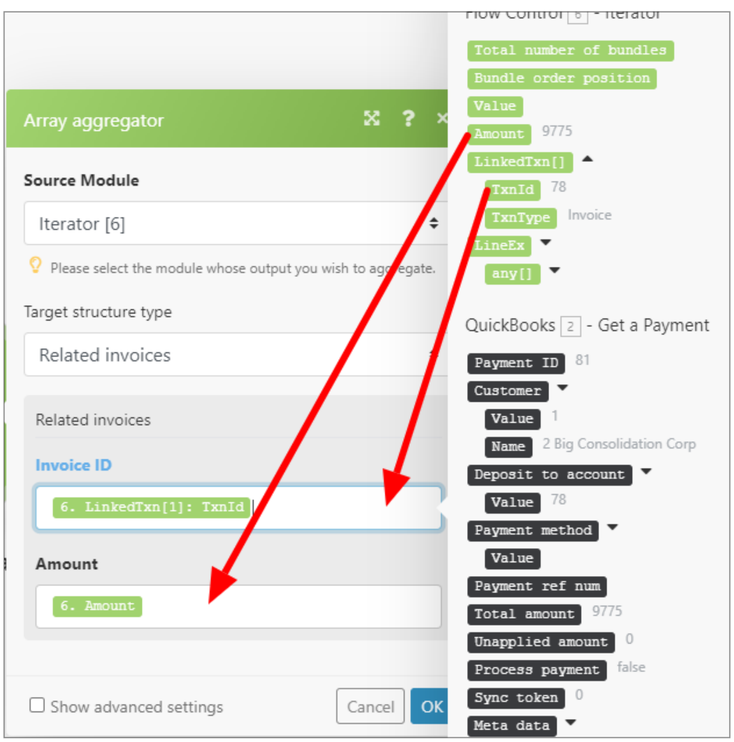
13. Click OK and add a new module to the Iterator and again search for Flow Control, then selecting Array aggregator.
14. Select Iterator as the source module and click OK.
15. Add a new module and search and select 1CRM.
16. Select Search for Records.
17. Select your 1CRM connection and select the Account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



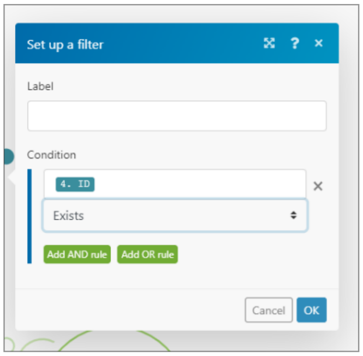
19. Scroll to the bottom and limit the query to 1 and click OK.
20. Add a new module and select 1CRM, then select Create a Record.
21. Select your 1CRM connection and select Payment as the Module.
22. Map the Payment fields in the 1CRM module, the Related invoices field can be mapped to the Array[] field:



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:



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:



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

1CRM & INTEGROMAT

A Guide to Integromat Integration Setup for Xero & Quickbooks Online