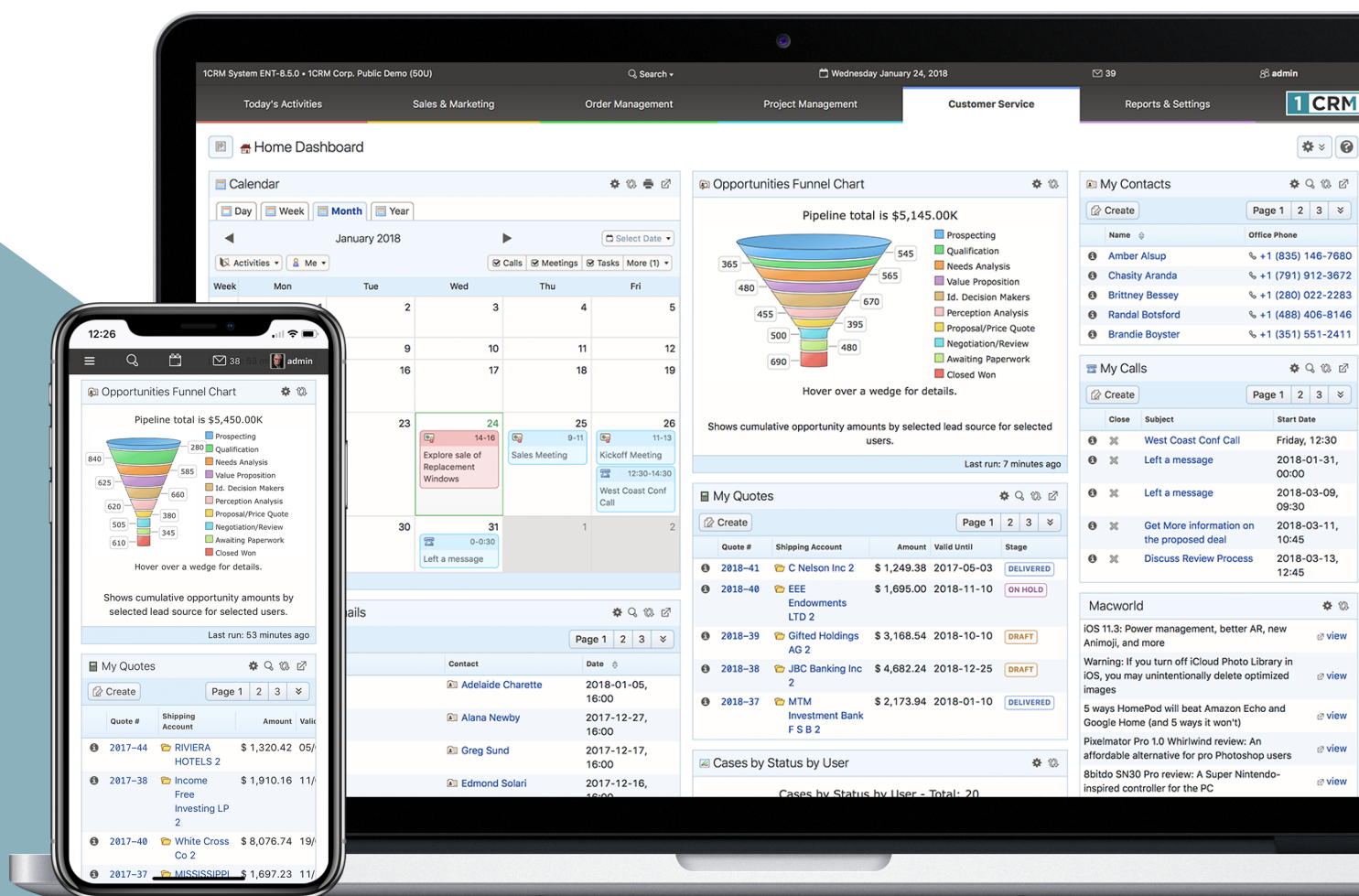


# 1CRM & ZAPIER

## A Guide to Configuring Zapier Integrations with 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.

Zapier is the world leader in acting as an integration switchboard between over 2,000 different SaaS (Software as a Service, web-based) systems. We have built integrations with Zapier, 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 Zapier integration with each of them. Our integration provides you with a 2-way synchronization between 1CRM and the accounting system of these items:

- Quotes (note Xero does not support quotes in their Zapier integration)
- 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

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.

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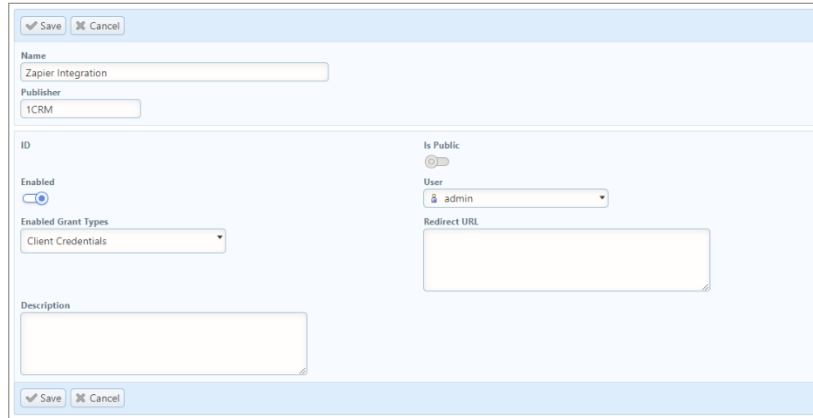
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# 1.0 Connecting to Zapier

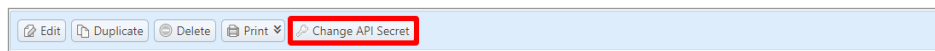
## 1.1 Creating the API Client in 1CRM.

1. Login to your 1CRM instance and navigate to the Administration section and click on API Clients
2. Create a new API Client for Zapier:



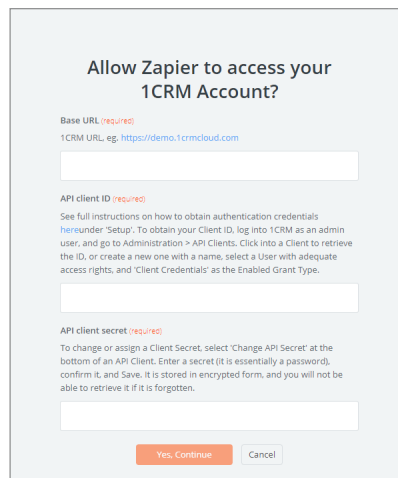
The screenshot shows the 'Create API Client' form in 1CRM. The form has a light blue header with 'Save' and 'Cancel' buttons. The main form area is white with a light blue border. It contains the following fields: 'Name' (text input with 'Zapier Integration'), 'Publisher' (text input with '1CRM'), 'ID' (text input), 'Is Public' (checkbox), 'Enabled' (checkbox), 'User' (dropdown menu with 'admin'), 'Enabled Grant Types' (dropdown menu with 'Client Credentials'), 'Redirect URL' (text area), and 'Description' (text area). At the bottom, there are 'Save' and 'Cancel' buttons.

3. View the newly created API Client records and change the API Secret:



The screenshot shows a toolbar for the API Client record. It contains buttons for 'Edit', 'Duplicate', 'Delete', 'Print', and 'Change API Secret'. The 'Change API Secret' button is highlighted with a red box.

4. Login to your Zapier accounts and navigate to "My Apps".
5. Connect a new account and search and select 1CRM.
6. A pop-up will be displayed with configuration fields:



The screenshot shows a pop-up window titled 'Allow Zapier to access your 1CRM Account?'. It contains the following fields: 'Base URL (required)' (text input with '1CRM URL, eg. https://demo.1crmcloud.com'), 'API client ID (required)' (text input), and 'API client secret (required)' (text input). Below the fields, there is a 'Yes, Continue' button and a 'Cancel' button.

7. Base URL: This should be the URL used to access your 1CRM instance (eg. <https://demo.1crmcloud.com>). Note that the URL is entered without a trailing "/".
8. API Client ID is the record ID for the API Client you created in step 2:

The screenshot shows the configuration page for a Zapier application named "1CRM". At the top, there are buttons for "Edit", "Duplicate", "Delete", "Print", and "Change API Secret". Below these, the application name "1CRM" is displayed. To the right, the creation and modification dates are shown: "Created: 2020-01-20, 16:22" and "Modified: 2020-01-30, 10:00". The "ID" field, containing the value "c195f44d-923c-fede-5faa-5e25d3a9106e", is highlighted with a red rectangular box. Below the ID, there are sections for "Enabled" (with a toggle switch), "Enabled Grant Types" (with a dropdown menu), and "Client Credentials". On the right side, there are settings for "Is Public" (with a toggle switch), "User" (set to "admin"), and "Redirect URL". At the bottom, there are buttons for "Edit", "Duplicate", "Delete", "Print", and "Change API Secret".

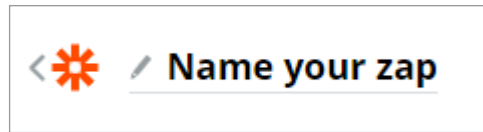
9. API Secret is the secret you entered in step 3.

10. Click Yes, and continue to connect your 1CRM account to Zapier.

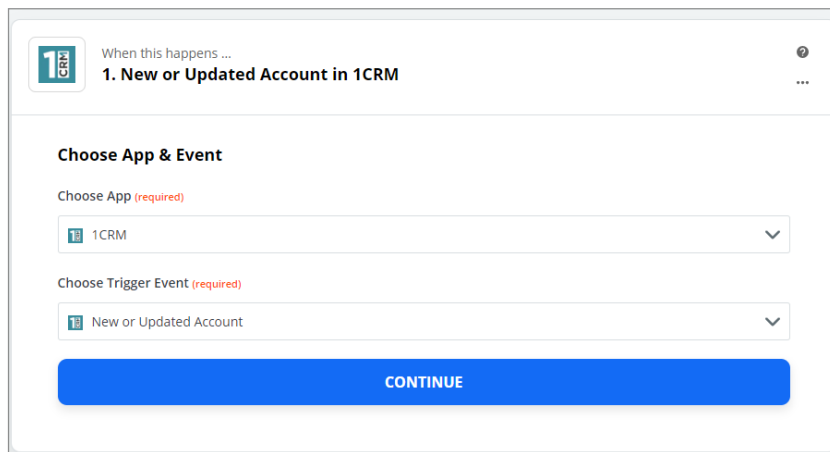
## 2.0 Integrating with Xero

### 2.1 Syncing New Accounts from 1CRM to Xero.

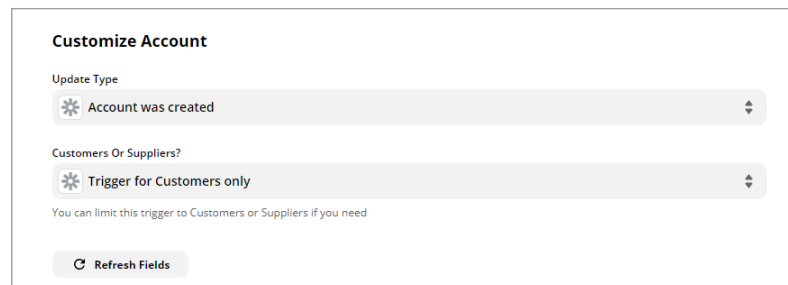
1. Login to your Zapier account and create a new Zap.
2. Name your Zap. (This is for your reference, and the name can be anything)



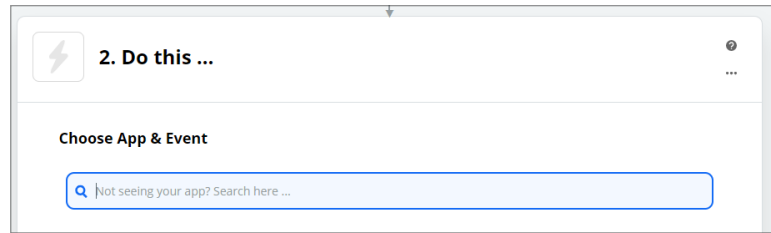
3. Choose the 1CRM app and select New or Updated Account as the Trigger Event:

A screenshot of the Zapier "Choose App & Event" configuration screen. It shows the 1CRM app selected under "Choose App (required)" and the "New or Updated Account" event selected under "Choose Trigger Event (required)". A blue "CONTINUE" button is at the bottom.

4. Select your linked 1CRM account.
5. Set the Update Type to Account was created.
6. You can now choose to only trigger this for customers:

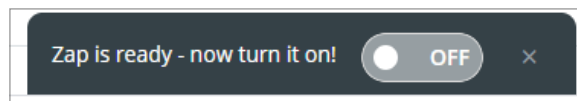
A screenshot of the Zapier "Customize Account" screen. It shows "Update Type" set to "Account was created" and "Customers Or Suppliers?" set to "Trigger for Customers only". A "Refresh Fields" button is at the bottom.

7. Click Continue and have Zapier test the connection to 1CRM.
8. If the test is successful, move on to the first action:



9. Search and select Xero from the apps and select Create/Update Contact as the Action Event.
10. Connect your Xero account if you have not already done so.
11. You can now customize the integrated fields:

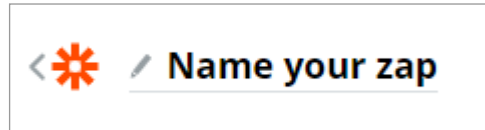
12. Once the fields are mapped, you can now have Zapier test your integration.
13. Is the integration test is successful, you can activate it by turning on your Zap:



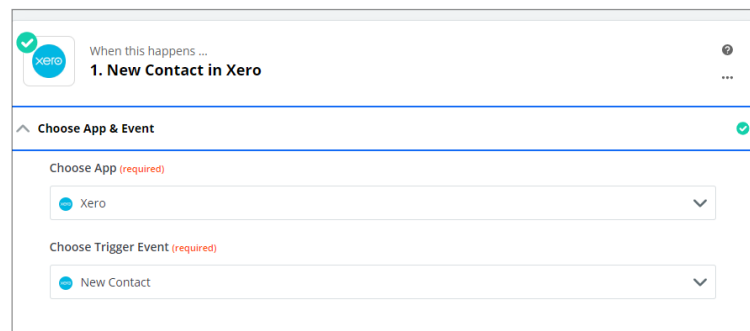
14. Ensure the integration works by creating a new account in 1CRM and confirming creation of the account in Xero.
15. This is an instant integration. All accounts created in 1CRM will be pushed to Xero instantly.

# 2.2 Syncing New Accounts from Xero to 1CRM

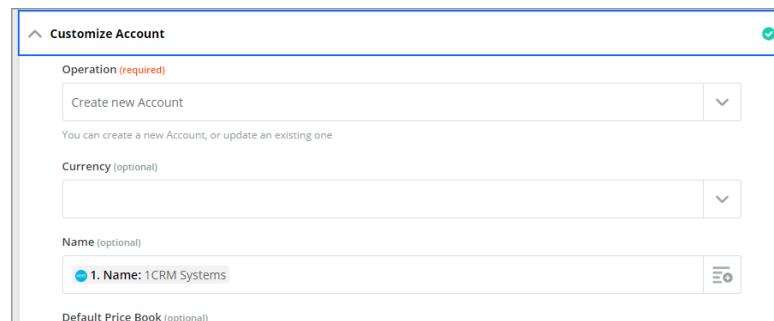
1. Make a new Zap and select Xero as the App.
2. Name your Zap.



3. Choose New Contact as the trigger event.

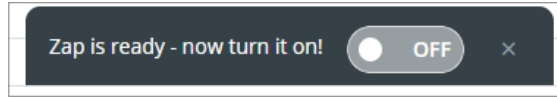
A screenshot of the Zapier 'Choose App & Event' section. It shows a dropdown menu for 'Choose App (required)' with 'Xero' selected, and another dropdown menu for 'Choose Trigger Event (required)' with 'New Contact' selected. The section is titled 'When this happens ... 1. New Contact in Xero'.

4. Choose your linked Xero account or link a new account.
5. Test the Xero connection.
6. Continue to the "Do This" section and select 1CRM as the App.
7. Choose Create / Update Account as the trigger event.
8. Continue to the next step and select your connected 1CRM account or connect a new account.
9. On the next step, select Create new Account as the Operation and map all the fields as required:

A screenshot of the Zapier 'Customize Account' section. It shows a dropdown menu for 'Operation (required)' with 'Create new Account' selected. Below this, there is a note: 'You can create a new Account, or update an existing one'. There are also optional fields for 'Currency' and 'Name' (with a value of '1. Name: 1CRM Systems'). At the bottom, there is an optional field for 'Default Price Book'.

10. Test the integration and ensure the account was created in 1CRM.
11. If the integration is a success, you can activate the Zap on the current screen:

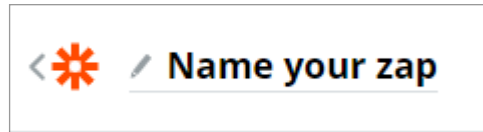




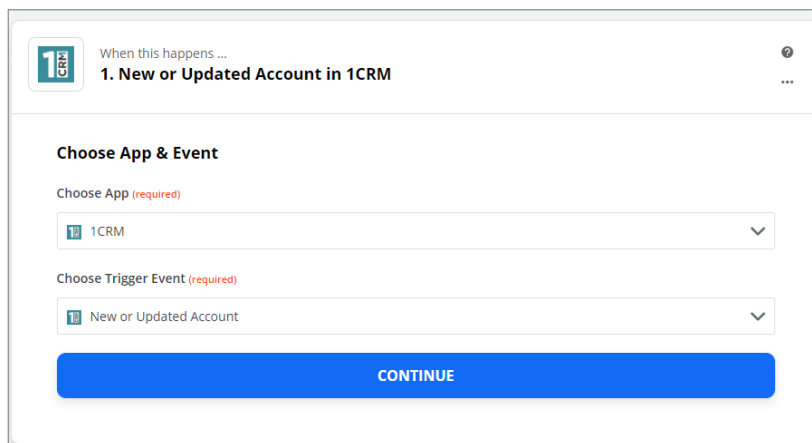
12. Accounts created in Xero will take a few minutes to Sync to 1CRM.

### 2.3 Updating an Account from 1CRM to Xero

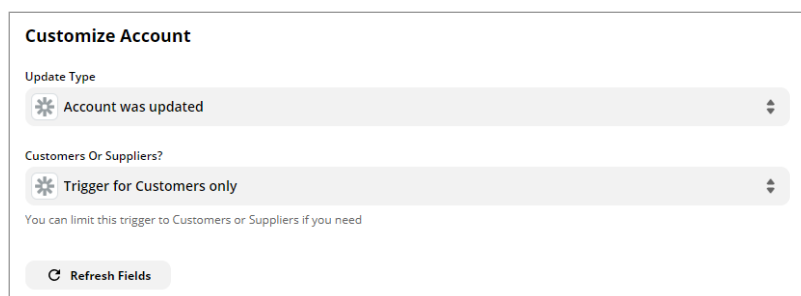
1. Login to your Zapier account and create a new Zap.
2. Name your Zap. (This is for your reference, and the name can be anything)



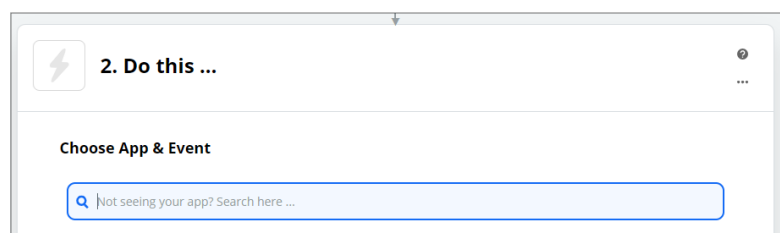
3. Choose the 1CRM app and select New or Updated Account as the Trigger Event:

A screenshot of the Zapier 'Choose App & Event' configuration screen for the 1CRM app. The title is 'When this happens ... 1. New or Updated Account in 1CRM'. Under 'Choose App (required)', '1CRM' is selected in a dropdown menu. Under 'Choose Trigger Event (required)', 'New or Updated Account' is selected in a dropdown menu. A blue 'CONTINUE' button is at the bottom.

4. Select your linked 1CRM account.
5. Set the Update Type to Account was updated.
6. You can now choose to only trigger this for customers:

A screenshot of the Zapier 'Customize Account' configuration screen. It shows 'Update Type' set to 'Account was updated' and 'Customers Or Suppliers?' set to 'Trigger for Customers only'. A note states 'You can limit this trigger to Customers or Suppliers if you need'. A 'Refresh Fields' button is at the bottom.

7. Click Continue and have Zapier test the connection to 1CRM.
8. If the test is successful, move on to the first action:

A screenshot of the Zapier '2. Do this ...' configuration screen. It shows the 'Choose App & Event' section with a search bar containing the text 'Not seeing your app? Search here ...'.

9. Search and select Xero from the apps and select Create/Update Contact as the Action Event.
10. Connect your Xero account if you have not already done so.
11. You can now customize the integrated fields:

Customize Contact

Contact Name (required)

1. Name: 1CRM Systems

Account Number (optional)

Primary Person - First Name (optional)

2. First Name: Harold

Primary Person - Last Name (optional)

2. Last Name: Scholtz

Primary Person - Email (optional)

2. Email1: null

Phone - Country Code (optional)

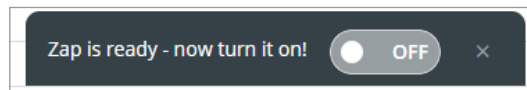
Phone - Area Code (optional)

Phone Number (optional)

1. Office Phone: null

*\*\* Note that the Contact Name is used to link the accounts and updating the name in 1CRM will result in a new contact created in Xero. This field cannot be updated.*

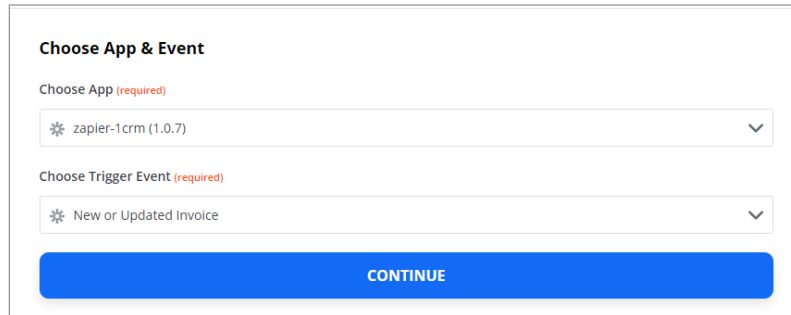
12. Once the fields are mapped, you can now have Zapier test your integration.
13. Is the integration test is successful, you can activate it by turning on your Zap:



14. Ensure the integration works by updating an account in 1CRM and confirming update in Xero.
15. This is an instant integration. All accounts updated in 1CRM will be pushed to Xero instantly.

### 2.4 Syncing Invoices from 1CRM to Xero

1. Login to your Zapier account and create a new Zap.
2. Select 1CRM at the first step "Choose App".
3. Select "New or Updated Invoice" at "Choose Trigger Event".



**Choose App & Event**

Choose App (required)

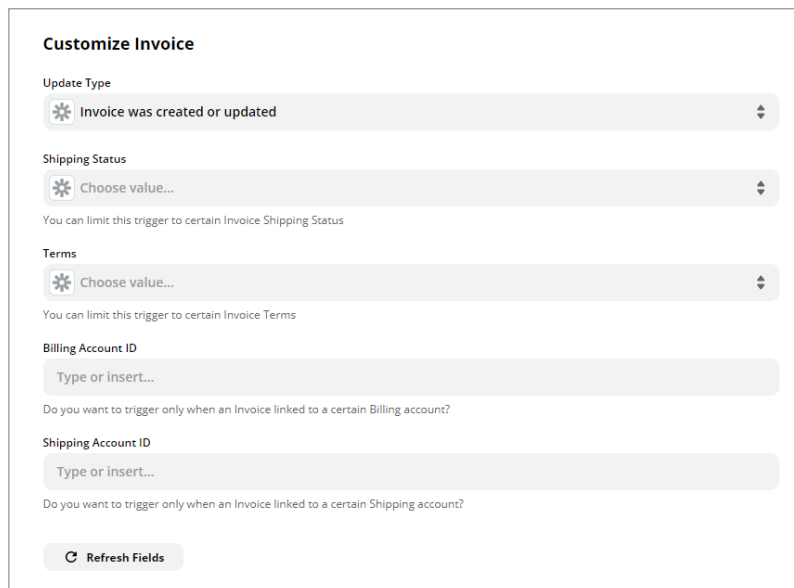
zapier-1crm (1.0.7)

Choose Trigger Event (required)

New or Updated Invoice

CONTINUE

4. Select your linked 1CRM account.
5. Select your filters as required:



**Customize Invoice**

Update Type

Invoice was created or updated

Shipping Status

Choose value...

You can limit this trigger to certain Invoice Shipping Status

Terms

Choose value...

You can limit this trigger to certain Invoice Terms

Billing Account ID

Type or insert...

Do you want to trigger only when an Invoice linked to a certain Billing account?

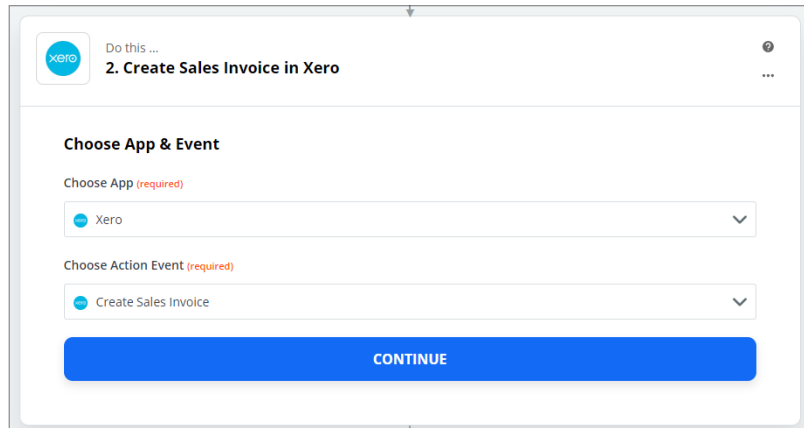
Shipping Account ID

Type or insert...

Do you want to trigger only when an Invoice linked to a certain Shipping account?

Refresh Fields

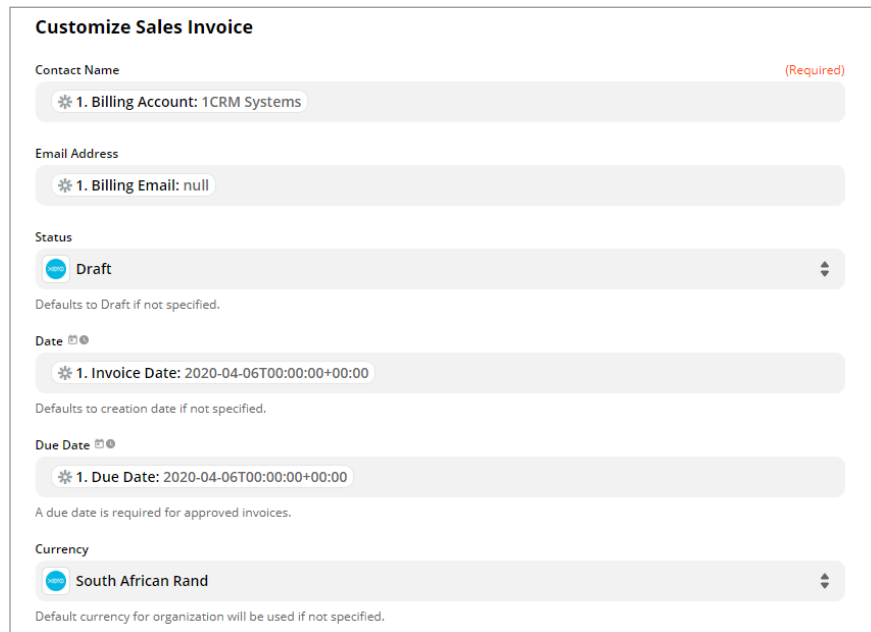
6. Test and continue with the setup if the test is successful.
7. Search and select Xero as the second step.
8. Select Create Sales Invoice as the Action Event



The screenshot shows a Zapier workflow step titled "2. Create Sales Invoice in Xero". It includes two dropdown menus: "Choose App" with "Xero" selected and "Choose Action Event" with "Create Sales Invoice" selected. A blue "CONTINUE" button is at the bottom.

9. Click Continue and select your linked Xero account.

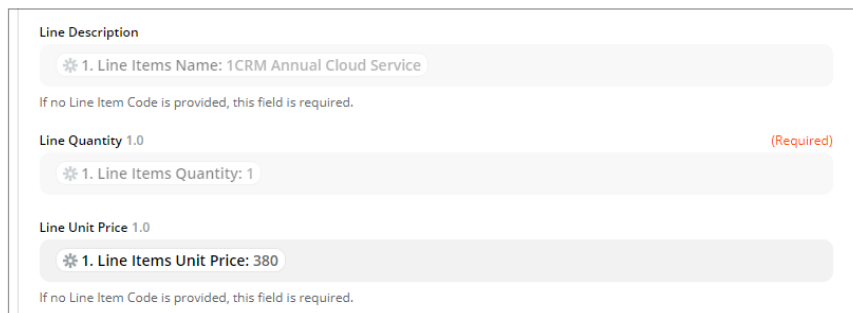
10. Below is an example of the mapped data:



The screenshot shows the "Customize Sales Invoice" form in Xero. It includes fields for "Contact Name" (1. Billing Account: 1CRM Systems), "Email Address" (1. Billing Email: null), "Status" (Draft), "Date" (1. Invoice Date: 2020-04-06T00:00:00+00:00), "Due Date" (1. Due Date: 2020-04-06T00:00:00+00:00), and "Currency" (South African Rand). Each field has a "1." prefix indicating it's mapped from a Zapier step.

\*\* Note: If Draft status is used, the invoice must be approved in Xero before a payment can be allocated. Alternatively, use Approved as the status.

11. Be sure to select the correct values for line items, below is an example if the line item values:



The screenshot shows the "Line Description" form in Xero. It includes fields for "Line Description" (1. Line Items Name: 1CRM Annual Cloud Service), "Line Quantity" (1. Line Items Quantity: 1), and "Line Unit Price" (1. Line Items Unit Price: 380). Each field has a "1." prefix indicating it's mapped from a Zapier step.

12. Ensure that the correct Line Account Code is selected. (eg. Sales)

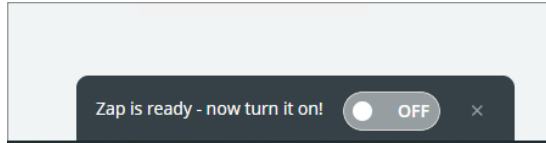
13. Once all fields are mapped, click Continue, then Test & Continue to write a test invoice to Xero.
14. Add a new action and select 1CRM as the app.
15. Select Create / Update Invoice as the Action Event.
16. Continue and select your connected 1CRM account.
17. Continue and select Update Existing Invoice.
18. Map the ID field from the created 1CRM invoice to the ID field:

The screenshot shows the 'Update existing Invoice' action configuration in Zapier. The 'Operation' is set to 'Update existing Invoice'. Below it, the 'ID' field is marked as '(required)' and has a 'Type or Insert...' dropdown. An 'Insert Data ...' modal is open, displaying a list of fields from the 1CRM app. The '1. ID d25022de-ec49-df3f-8629-5f871d09185c' field is selected and highlighted with a blue border. Other visible fields include '1. Line Items Tax Class ID', '1. Line Items Unit Price', '1. Line Items Unit Price Usd', '1. Final Milestone', '1. Amount', '1. Event', '1. Invoice Number Prefix', and '1. Tax Tax Amount'.

19. Scroll down and map the Invoice ID field from Xero to the Integrated ID field:

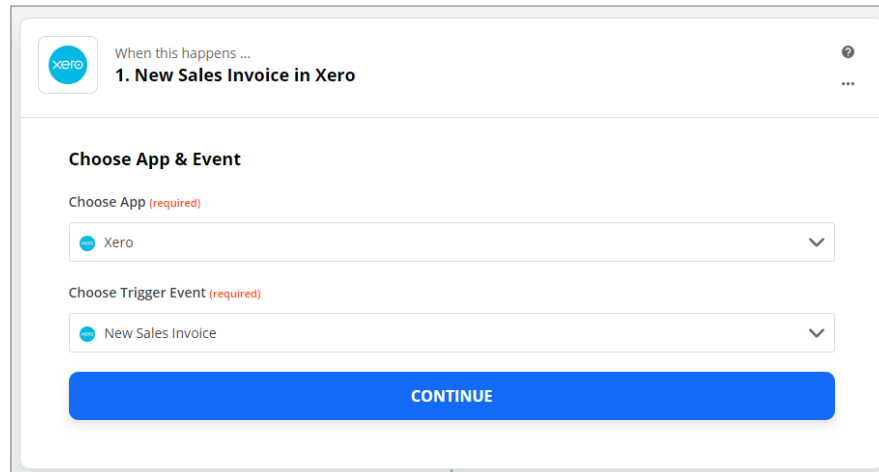
The screenshot shows the 'Integrated ID' field configuration in Zapier. The 'Type or Insert...' dropdown is open, and the 'Insert Data ...' modal is displayed. The '2. Invoice ID 3f3e6690-287a-4d50-afff-3bb1eb5c5084' field is selected and highlighted with a blue border. Other visible fields include '2. Currency Code ZAR', '2. Currency Rate 1.000000', '2. Has Errors false', '2. Invoice Number INV-0027', '2. Line Amount Types Exclusive', '2. Sent To Contact false', and '2. Sub Total 98000.00'.

20. Continue and test the invoice update. Make sure that all the previous tests were successful.
21. If the test is successful, you can now activate the Zap to start your integration:



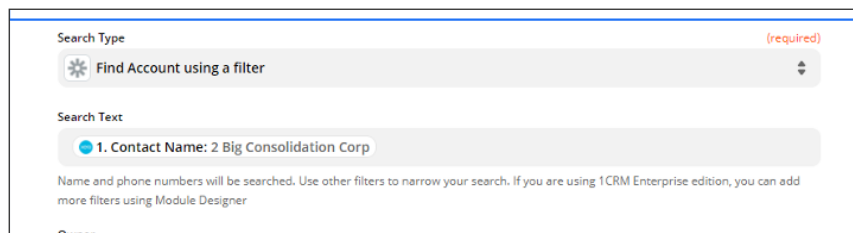
# 2.5 Syncing Invoices from Xero to 1CRM

1. Login to your Zapier account and create a new Zap.
2. Select Xero at the first step “Choose App”
3. Select New Sales Invoice as the Trigger Event.



The screenshot shows the Zapier interface for configuring a trigger. At the top, it says 'When this happens ...' followed by '1. New Sales Invoice in Xero'. Below this is a section titled 'Choose App & Event'. Under 'Choose App (required)', 'Xero' is selected in a dropdown menu. Under 'Choose Trigger Event (required)', 'New Sales Invoice' is selected in a dropdown menu. A blue 'CONTINUE' button is at the bottom.

4. Select your connected Xero account or connect a new account.
5. Continue and select an invoice status filter if required.
6. Continue and test the trigger.
7. If the test is successful, continue to the next step.
8. Search and select 1CRM.
9. Select Find Account as the Action Event and Continue.
10. Select your connected 1CRM account.
11. Select Find Account using a filter as the Search Type.
12. Map the Contact Name field from Xero to the Search Text field:



The screenshot shows the configuration for the 'Find Account' action in 1CRM. Under 'Search Type (required)', 'Find Account using a filter' is selected. Under 'Search Text', '1. Contact Name: 2 Big Consolidation Corp' is entered. A note at the bottom states: 'Name and phone numbers will be searched. Use other filters to narrow your search. If you are using 1CRM Enterprise edition, you can add more filters using Module Designer'.

13. Continue and test the trigger, if the account exists in 1CRM, the test will be successful.
14. Add a new action and select 1CRM as the trigger app.
15. Select Create/Update Invoice as the Action Event and Continue.
16. Select your connected 1CRM account.
17. Select Create New Invoice as the Operation:





**Customize Invoice**

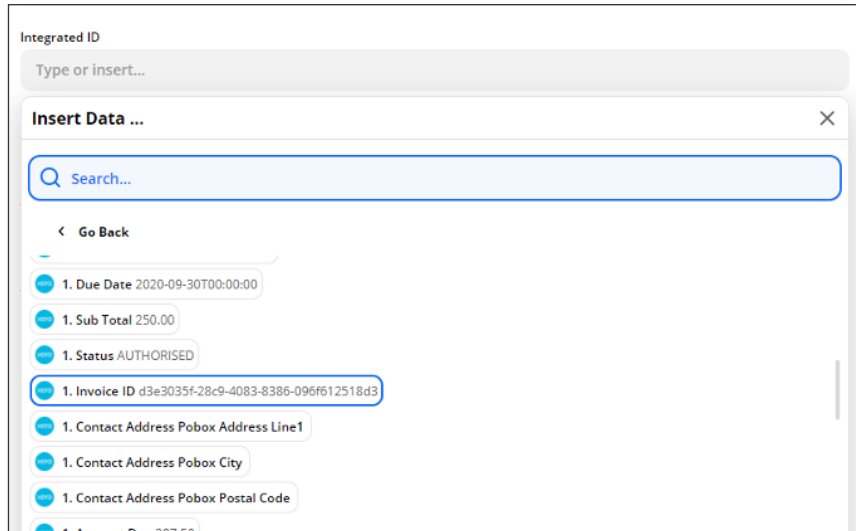
Operation (Required)

Create new Invoice

You can create a new Invoice, or update an existing one

18. You can now continue to map the fields as required. Line items will be marked by Xero as "Line Items". (eg. Line Items Description – This would be the Line Item Names on 1CRM).

19. Map the Invoice ID from Xero to the Integrated ID field:



Integrated ID

Type or insert...

Insert Data ...

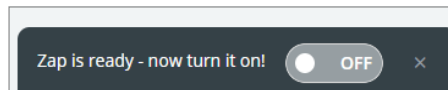
Search...

< Go Back

- 1. Due Date 2020-09-30T00:00:00
- 1. Sub Total 250.00
- 1. Status AUTHORISED
- 1. Invoice ID d3e3035f-28c9-4083-8386-096f612518d3
- 1. Contact Address Pobox Address Line1
- 1. Contact Address Pobox City
- 1. Contact Address Pobox Postal Code
- 1. Amount Due 287.50

20. Click Continue and test the integration

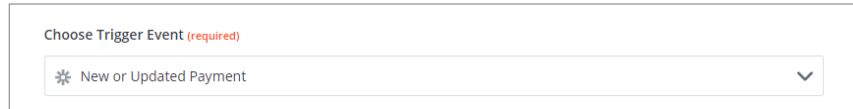
21. If the test is successful, activate your Zap:



Zap is ready - now turn it on! ☐ OFF X

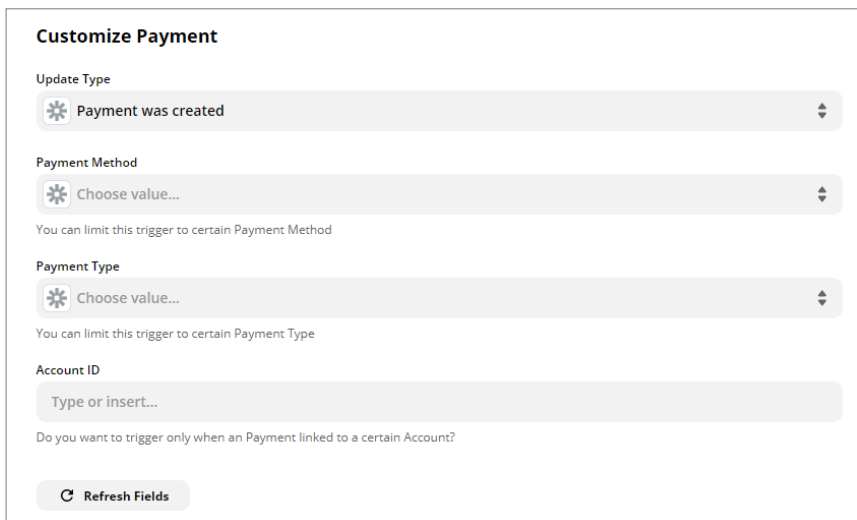
## 2.6 Syncing Payments from 1CRM to Xero

1. Login to your Zapier account and create a new Zap.
2. Select 1CRM at the first step “Choose App”
3. Select New or Updated Payment as the Trigger Event.



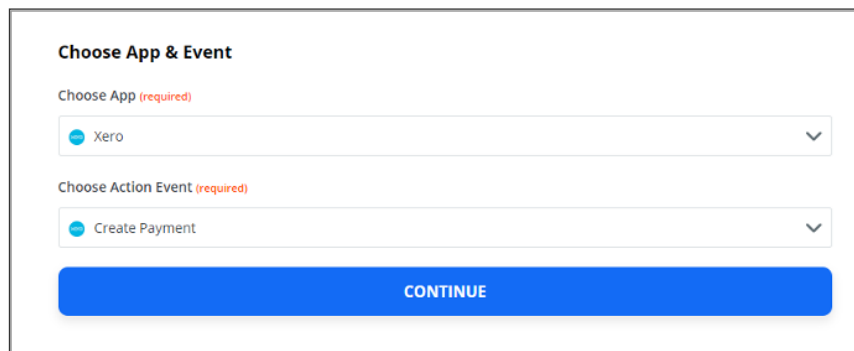
A screenshot of a dropdown menu titled "Choose Trigger Event (required)". The menu is open, showing a single option: "New or Updated Payment" with a gear icon on the left and a downward arrow on the right.

4. Continue and select your linked 1CRM instance.
5. Continue and select Payment was created as the Update Type.
6. Select your required filters if needed:



A screenshot of the "Customize Payment" configuration screen in Zapier. It contains several sections: "Update Type" with a dropdown menu showing "Payment was created"; "Payment Method" with a dropdown menu showing "Choose value..."; "Payment Type" with a dropdown menu showing "Choose value..."; and "Account ID" with a text input field showing "Type or insert...". Below the "Account ID" field is a checkbox labeled "Do you want to trigger only when an Payment linked to a certain Account?". At the bottom is a "Refresh Fields" button.

7. Continue and test your trigger.
8. If the test was successful, continue and again choose Xero as the App and Create Payment as the Action Event:



A screenshot of the "Choose App & Event" screen in Zapier. It contains two dropdown menus: "Choose App (required)" showing "Xero" and "Choose Action Event (required)" showing "Create Payment". Below these is a large blue "CONTINUE" button.

9. Select your connected Xero account and Continue.
10. Select Invoice as the Document Type. The The Integrated ID field from 1CRM is used as the Document ID or Number field. This field can be selected in the Find Invoice information:

The screenshot shows the 'Document ID Or Number' field in a Zapier form, which is marked as '(required)'. Below the field is a search bar with the text 'related'. A dropdown menu titled 'Insert Data ...' is open, displaying a list of related fields from 1CRM. The fields are:

- 1. Related Invoices Amount Usdollar 990
- 1. Related Invoices Currency ID -99
- 1. Related Invoices Date Modified 2020-10-19 10:28:15
- 1. Related Invoices Deleted 0
- 1. Related Invoices Exchange Rate 1
- 1. Related Invoices Integrated ID a1d4134d-d4c1-4016-8db2-0401089f3fe7** (This field is highlighted with a blue border)
- 1. Related Invoices Invoice ID 534abb0e-d0cd-cea7-6a34-5f8d66adfa0
- 1. Related Invoices Payment ID 965a15d3-9325-bd25-baaa-5f8d66ad844e7
- 1. Related Invoice 2020-327: Test Xero
- 1. Related Invoice 534abb0e-d0cd-cea7-6a34-5f8d66adfa0

11. Select the Paid To account as required.
12. The date field can be set to the Payment Date field from 1CRM.
13. Set the Amount to the Allocated Amount field from 1CRM.
14. Reference can be set to the Customer Reference No. field from 1CRM.
15. Below is an example of the mapped fields:

The screenshot shows a Zapier form with the following fields and values:

- Organization** (required): 1CRM Corp.
- Document Type**: Invoice (default)
- Document ID Or Number** (required): 1. Related Invoices Integrated ID: a1d4134d-d4c1-4...b2-0401089f3fe7
- Paid To** (required): Owner A Drawings
- Date**: 1. Payment Date: 2020-10-19
- Currency Rate**: 1.0
- Amount** (required): 1. Allocated Amount: 990
- Reference**: 1. Customer Reference No.: No data

\*\*Note: Payments can only be allocated to Approved invoices in Xero:

16. Continue and test the integration.
17. If the test is successful, you can activate the Zap by turning it on:

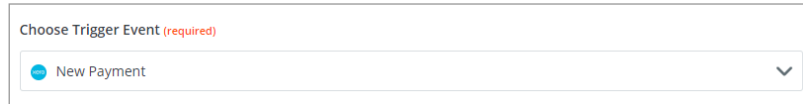
Zap is ready - now turn it on!

☐ OFF



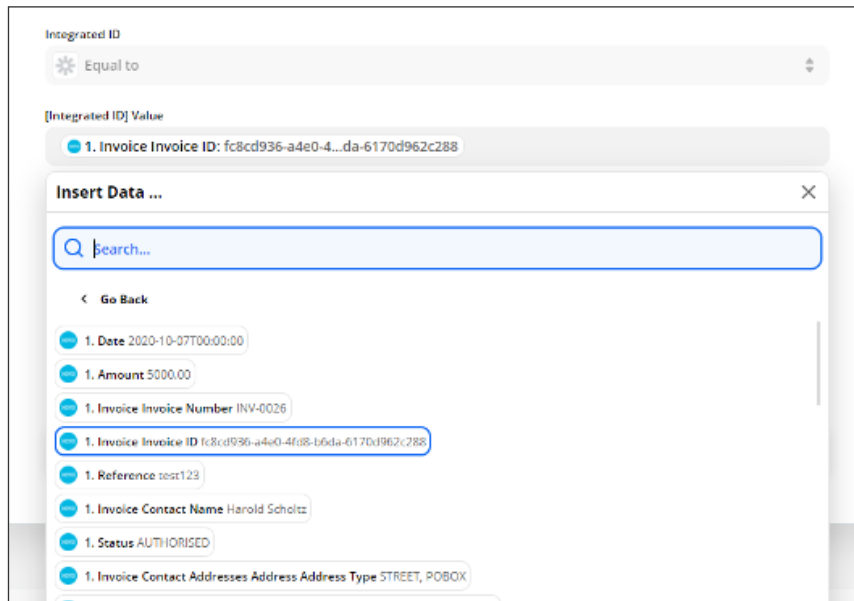
# 2.7 Syncing Payments from Xero to 1CRM

1. Login to your Zapier account and create a new Zap.
2. Select Xero at the first step "Choose App"
3. Select New Payment as the Trigger Event.



A screenshot of the Zapier interface showing the 'Choose Trigger Event (required)' dropdown menu. The menu is open, and 'New Payment' is selected, indicated by a blue dot and a checkmark.

4. Continue and select your linked Xero instance.
5. Continue and select Accounts Receivable as the Payment Type.
6. Continue and test your trigger.
7. If the test was successful, continue and choose 1CRM as the App and Find Invoices as the Action Event.
8. Continue, select your connected 1CRM account and Continue again.
9. Select Find Invoice using a filter as the Search Type.
10. At the Integrated ID field, select Equal to, and select the Invoice ID field from the Xero fields list as the Value:



A screenshot of the Zapier interface showing the 'Integrated ID' field configuration. The field is set to 'Equal to'. Below it, the '[Integrated ID] Value' is set to '1. Invoice Invoice ID: fc8cd936-a4e0-4...da-6170d962c288'. An 'Insert Data ...' dropdown menu is open, showing a list of fields. The field '1. Invoice Invoice ID fc8cd936-a4e0-4f8b-b6da-6170d962c288' is selected and highlighted with a blue border.

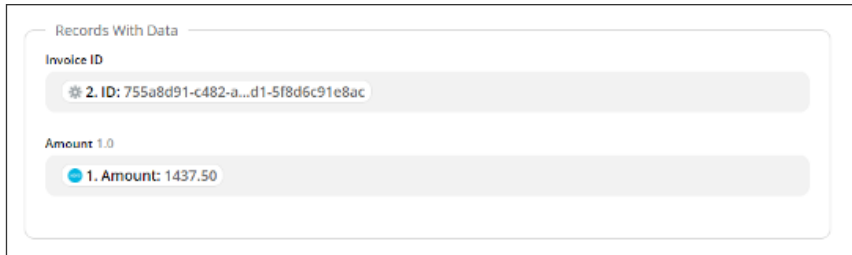
11. Continue and test the connection.
12. If the test was successful, continue and choose 1CRM as the App and Create / Update Payment as the Action Event:



A screenshot of the Zapier interface showing the 'Choose Action Event (required)' dropdown menu. The menu is open, and 'Create / Update Payment' is selected, indicated by a blue dot and a checkmark.

13. Continue, select your connected 1CRM account and Continue again.

14. Select Create New Payment as the Operation.
15. Map the fields as required. For the Records with Data section, map the Invoice ID field from the ID in the second step, and map the Amount to the Payment Amount field:



Records With Data

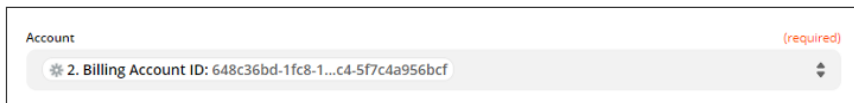
Invoice ID

2. ID: 755a8d91-c482-a...d1-5f8d6c91e8ac

Amount 1.0

1. Amount: 1437.50

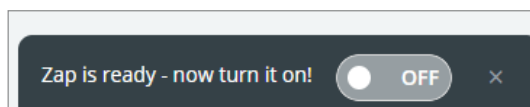
16. Account should be the Billing Account ID retrieved in the second step:



Account (required)

2. Billing Account ID: 648c36bd-1fc8-1...c4-5f7c4a956bcf

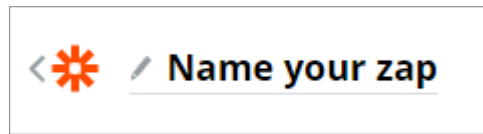
17. Continue and test the integration.
18. If the test is successful, you can activate the Zap by turning it on:



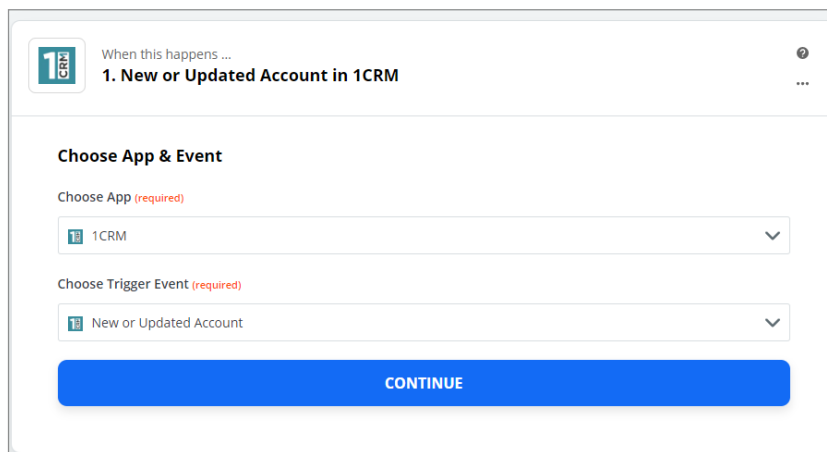
## 3.0 Integrating with Quickbooks Online

### 3.1 Syncing New Accounts from 1CRM to Quickbooks Online.

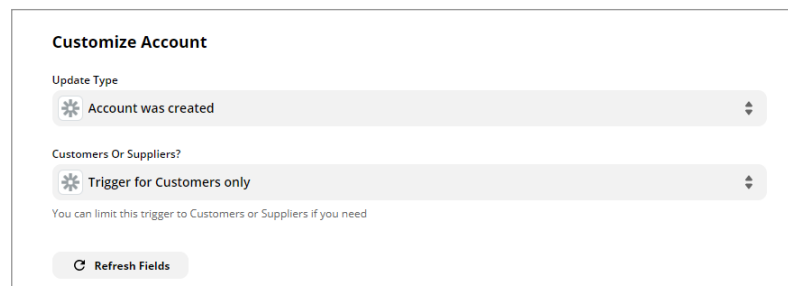
1. Login to your Zapier account and create a new Zap.
2. Name your Zap. (This is for your reference, and the name can be anything)



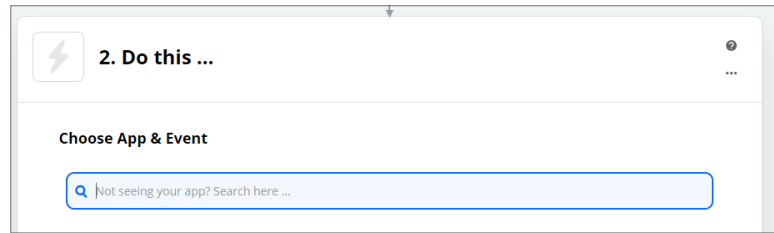
3. Choose the 1CRM app and select New or Updated Account as the Trigger Event:

A screenshot of the Zapier "Choose App & Event" configuration screen. It shows the 1CRM app selected under "Choose App (required)" and the "New or Updated Account" event selected under "Choose Trigger Event (required)". A blue "CONTINUE" button is at the bottom.

4. Select your linked 1CRM account.
5. Set the Update Type to Account was created.
6. You can now choose to only trigger this for customers:

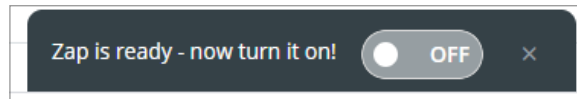
A screenshot of the Zapier "Customize Account" screen. It shows "Update Type" set to "Account was created" and "Customers Or Suppliers?" set to "Trigger for Customers only". A "Refresh Fields" button is at the bottom.

7. Click Continue and have Zapier test the connection to 1CRM.
8. If the test is successful, move on to the first action:



9. Search and select Quickbooks Online from the apps and select Create Customer as the Action Event.
10. Connect your Quickbooks Online account if you have not already done so.
11. You can now customize the integrated fields:

12. Once the fields are mapped, you can now have Zapier test your integration.
13. Is the integration test is successful, you can activate it by turning on your Zap:

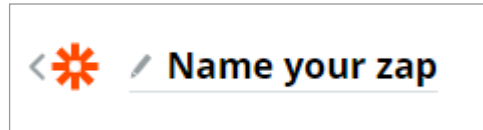


14. Ensure the integration works by creating a new account in 1CRM and confirming creation of the account in Quickbooks Online.
15. This is an instant integration. All accounts created in 1CRM will be pushed to Quickbooks Online instantly.



### 3.2 Syncing New Accounts from Quickbooks Online to 1CRM

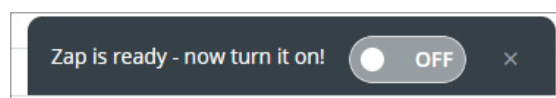
1. Make a new Zap and select QuickBooks as the App.
2. Name your Zap.



3. Choose New Customer as the trigger event.

4. Choose your linked Quickbooks Online account or link a new account.
5. Test the Quickbooks Online connection.
6. Continue to the "Do This" section and select 1CRM as the App.
7. Choose Create / Update Account as the trigger event.
8. Continue to the next step and select your connected 1CRM account or connect a new account.
9. On the next step, select Create new Account as the Operation and map all the fields as required:

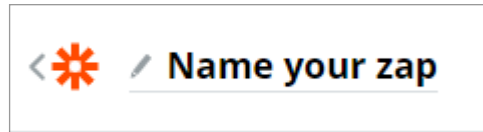
10. Test the integration and ensure the account was created in 1CRM.
11. If the integration is a success, you can activate the Zap on the current screen:



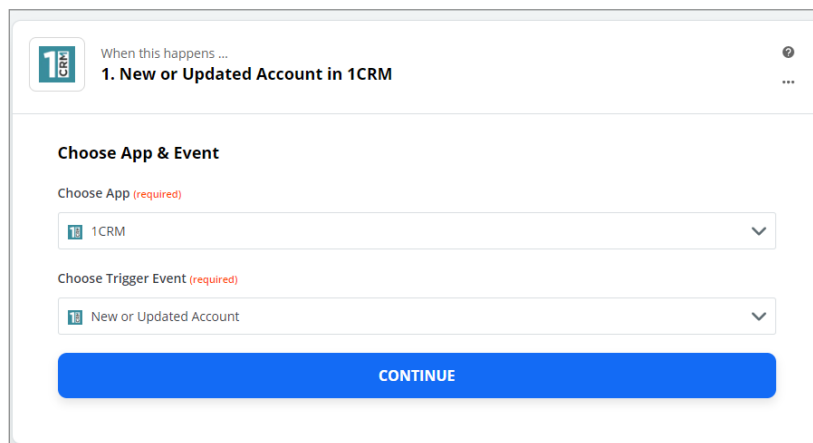
12. Accounts created in Quickbooks Online will take a few minutes to Sync to 1CRM.

### 3.3 Updating an Account from 1CRM to Quickbooks Online

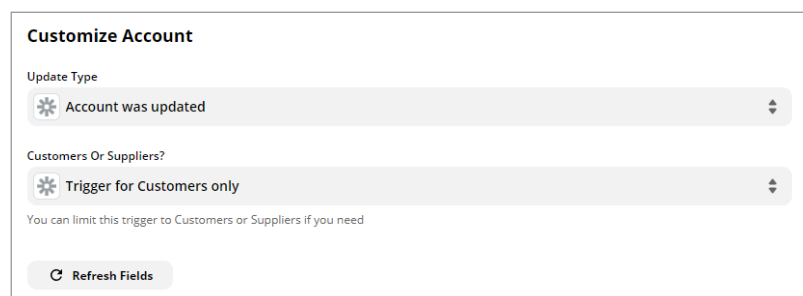
1. Login to your Zapier account and create a new Zap.
2. Name your Zap. (This is for your reference, and the name can be anything).



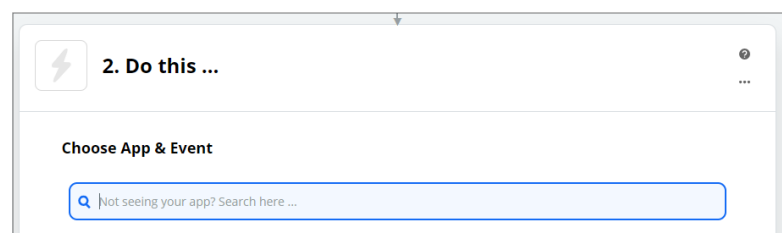
3. Choose the 1CRM app and select New or Updated Account as the Trigger Event:

A screenshot of the Zapier "Choose App & Event" configuration screen. At the top, it says "When this happens ..." followed by "1. New or Updated Account in 1CRM". Below this, there are two dropdown menus: "Choose App (required)" with "1CRM" selected, and "Choose Trigger Event (required)" with "New or Updated Account" selected. At the bottom is a large blue button labeled "CONTINUE".

4. Select your linked 1CRM account.
5. Set the Update Type to Account was updated.
6. You can now choose to only trigger this for customers:

A screenshot of the Zapier "Customize Account" screen. It features two dropdown menus: "Update Type" with "Account was updated" selected, and "Customers Or Suppliers?" with "Trigger for Customers only" selected. Below the second dropdown is a small text note: "You can limit this trigger to Customers or Suppliers if you need". At the bottom left is a button labeled "Refresh Fields".

7. Click Continue and have Zapier test the connection to 1CRM.
8. If the test is successful, move on to the first action:

A screenshot of the Zapier "2. Do this ..." screen. It shows a lightning bolt icon and the heading "2. Do this ...". Below this is a section titled "Choose App & Event" with a search bar containing the text "Not seeing your app? Search here ...".

9. Search and select Quickbooks Online from the apps and select Find Customer as the Action Event.
10. Connect your Quickbooks Online account if you have not already done so.
11. Select "Name" as the Search Field and "Name" as the Search value.
12. Continue and test the connection.
13. If the test is successful, add another trigger by clicking on the "+" sign.

Search Field (required)  
Name (called "Display name as" in Quickbooks)

Search Value (required)  
1. Name: 1CRM Corp.

Depending on which "Search Field" you selected, the search value must exactly match the "Display name as" field or "Email" field in Quickbooks.

☐ Create QuickBooks Online Customer if it doesn't exist yet?

Refresh Fields

Send Data (skipped)

Done Editing

+

14. Select the Quickbooks Online app again and choose Update Customer as the Action Event.
15. Continue and select your connected Quickbooks Online account, continue again.
16. You can now customize the integrated fields:

Customize Updated Customer

Customer (Required)  
2. ID: 13

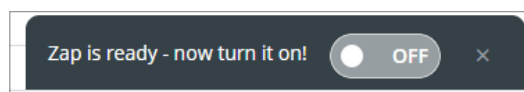
Company  
Type or insert...

Email  
1. Email: No data

Title

*\*\* Note that the Customer ID is retrieved from the second step in this Zap.*

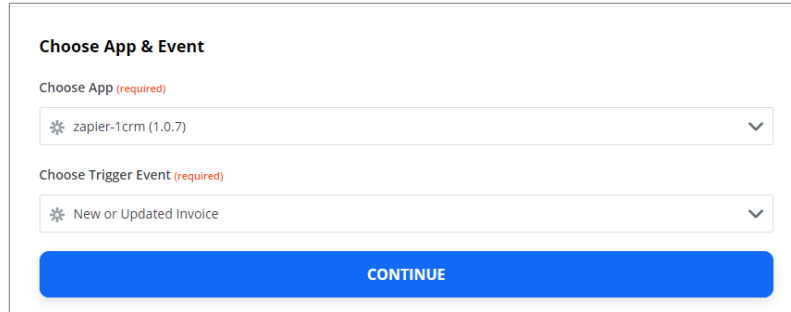
17. Once the fields are mapped, you can now have Zapier test your integration.
18. Is the integration test is successful, you can activate it by turning on your Zap:



19. Ensure the integration works by updating an account in 1CRM and confirming update in Quickbooks Online.
20. This is an instant integration. All accounts updated in 1CRM will be pushed to Quickbooks Online instantly.

### 3.4 Syncing Invoices from 1CRM to Quickbooks Online

1. Login to your Zapier account and create a new Zap.
2. Select 1CRM at the first step “Choose App”.
3. Select “New or Updated Invoice” at “Choose Trigger Event”.



**Choose App & Event**

Choose App (required)

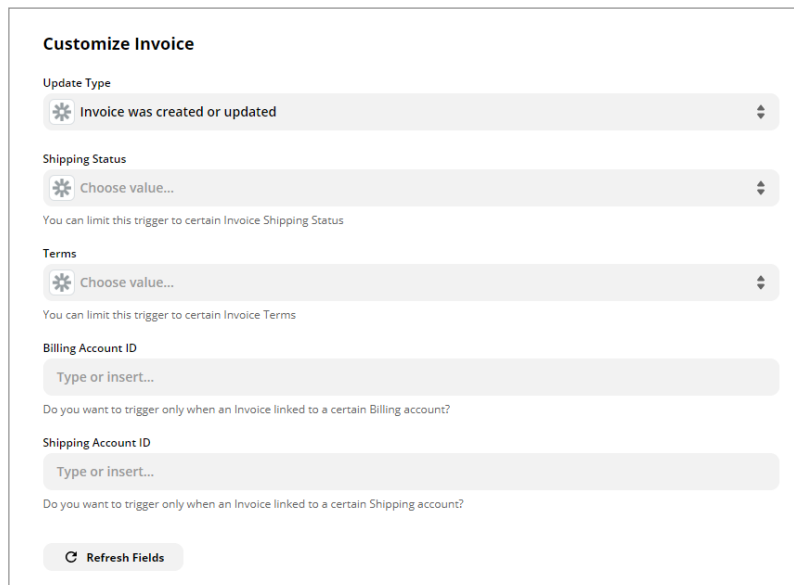
zapier-1 crm (1.0.7)

Choose Trigger Event (required)

New or Updated Invoice

CONTINUE

4. Select your linked 1CRM account.
5. Select your filters as required:



**Customize Invoice**

Update Type

Invoice was created or updated

Shipping Status

Choose value...

You can limit this trigger to certain Invoice Shipping Status

Terms

Choose value...

You can limit this trigger to certain Invoice Terms

Billing Account ID

Type or insert...

Do you want to trigger only when an Invoice linked to a certain Billing account?

Shipping Account ID

Type or insert...

Do you want to trigger only when an Invoice linked to a certain Shipping account?

Refresh Fields

6. Test and continue with the setup if the test is successful.
7. Search and select Quickbooks Online from the apps and select Find Customer as the Action Event.
8. Connect your Quickbooks Online account if you have not already done so.
9. Select “Name” as the Search Field and “Name” as the Search value.
10. Continue and test the connection.
11. If the test is successful, add another trigger by clicking on the “+” sign.

The screenshot shows the 'Search Field' and 'Search Value' configuration sections in Zapier. The 'Search Field' dropdown is set to 'Name (called "Display name as" in Quickbooks)'. The 'Search Value' dropdown is set to '1. Name: New Account QB -> 1CRM'. Below these fields, there is a checkbox for 'Create QuickBooks Online Customer if it doesn't exist yet?' and a 'Refresh Fields' button. At the bottom, there is a 'Send Data' section with a green checkmark and a 'Done Editing' button. A red box highlights a blue plus icon at the bottom center of the interface.

12. Select Quickbooks Online as the app and Create Invoice as the Action Event.

The screenshot shows the 'Choose App & Event' section in Zapier. The 'Choose App' dropdown is set to 'QuickBooks Online'. The 'Choose Action Event' dropdown is set to 'Create Invoice'. Both dropdowns have a green checkmark next to them.

13. Click Continue and select your linked Quickbooks Online account.

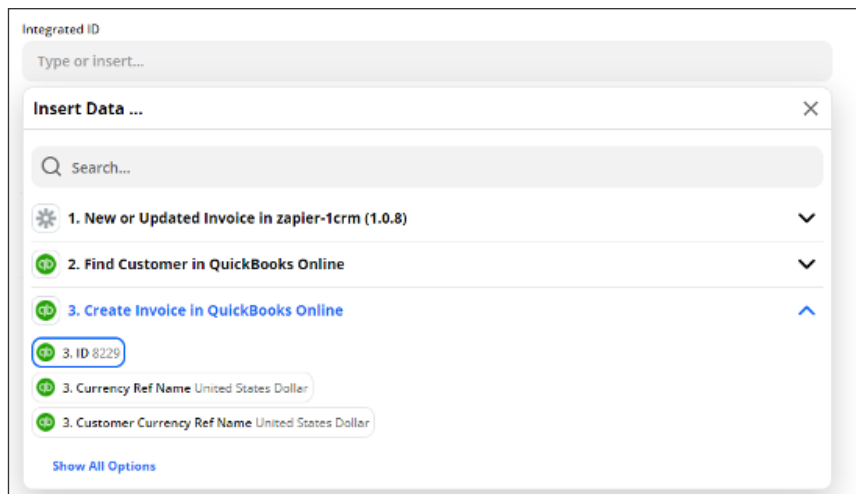
14. Be sure to select the correct values for line items, below is an example if the line item values:

The screenshot shows the 'Line Items' section in Zapier. It contains several input fields: 'Service Date' (placeholder: 'Type or insert...'), 'Product/Service' (dropdown: 'Sales'), 'Description' (placeholder: '1. Line Items Name: 1CRM Annual Cloud Service'), 'Quantity' (placeholder: '1. Line Items Quantity: 1'), 'Rate' (placeholder: 'Type or insert...'), 'Amount' (placeholder: '1. Line Items Ext Price: 380'), 'Tax' (dropdown: 'Choose value...'), and 'Class' (dropdown: 'Choose value...'). There are also checkboxes for 'Should not include tax.' and a note at the bottom: 'Only available if class tracking is enabled and assigned using the "one to each row in transaction" option.'

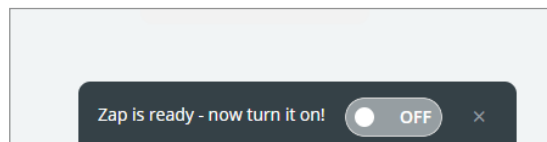
15. Once all fields are mapped, click Continue, then Test & Continue to write a test invoice to Quickbooks Online.
16. Add another Action and select 1CRM as the App, and Create / Update Invoice as the action trigger.
17. Continue and select your linked 1CRM account.
18. Continue and select Update existing invoice as the Operation.
19. Map the Invoice ID field from the ID field of the 1CRM invoice:



20. Scroll down and map the Integrated ID field to the Quickbooks ID field:

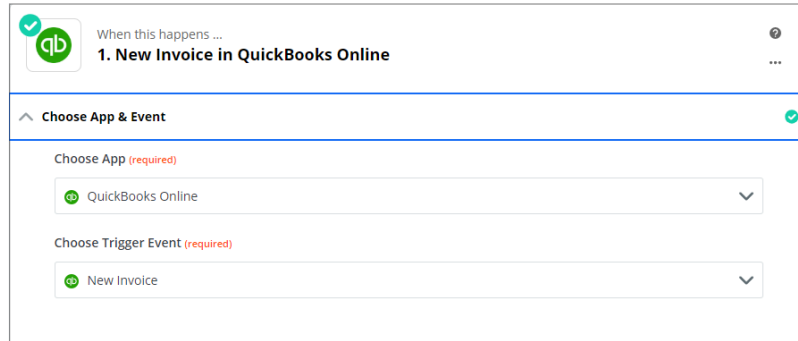


21. Continue and test the update.
22. If the test is successful, you can now activate the Zap to start your integration:



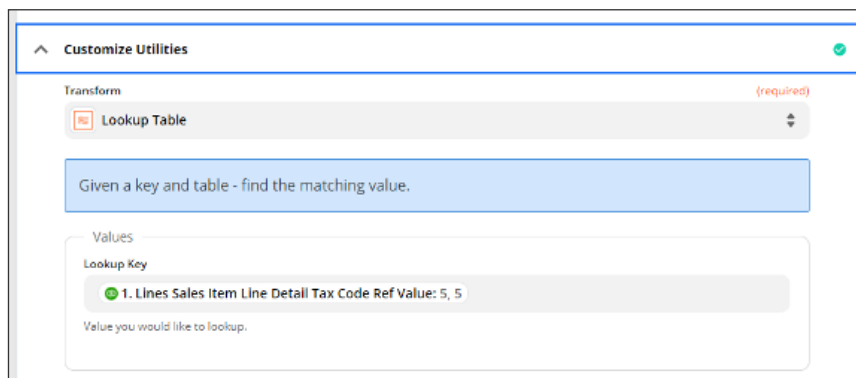
## 3.5 Syncing Invoices from QuickBooks to 1CRM

1. Login to your Zapier account and create a new Zap.
2. Select Quickbooks Online at the first step "Choose App"
3. Select New Invoice as the Trigger Event.



The screenshot shows the Zapier interface for configuring a trigger. At the top, it says "When this happens ..." followed by "1. New Invoice in QuickBooks Online". Below this is a section titled "Choose App & Event". Under "Choose App (required)", "QuickBooks Online" is selected in a dropdown menu. Under "Choose Trigger Event (required)", "New Invoice" is selected in a dropdown menu.

4. Select your connected Quickbooks Online account or connect a new account.
5. Continue and test the trigger.
6. If the test was successful, continue and choose 1CRM as the App and Find Accounts as the Action Event.
7. Continue, select your connected 1CRM account and Continue again.
8. Select Find Account using a filter as the Search Type.
9. At the Search Text field, select the Invoice Contact Name field from the QuickBooks fields list.
10. Continue and test the connection.
11. Add a new Action, choosing the Formatter by Zapier as the app, and selecting Utilities as the Action Event.
12. Continue and select Lookup Table.
13. Map the Line Item Tax Code as the Lookup Key:



The screenshot shows the Zapier interface for configuring a utility. The section is titled "Customize Utilities". Under the "Transform" section, "Lookup Table" is selected. Below this is a blue box with the text "Given a key and table - find the matching value." Under the "Values" section, "Lookup Key" is selected, and "1. Lines Sales Item Line Detail Tax Code Ref Value: 5, 5" is entered in the field. Below the field is the text "Value you would like to lookup."

14. We now need to map the Tax Codes in this lookup table by manually retrieving the Tax Code ID in Quickbooks.
15. Open the following link and allow the connection to your Quickbooks account:  
<https://www.1crm.com/qb/auth.php>

16. Once you have completed your Quickbooks authentication and allowed 1CRM to access Quickbooks, you will find your tax codes displayed as shown below, together with their ID's:

**ID: 8**  
**Name: Auto Tax**  
**Description: Auto Tax**

17. Return to your Zapier app, and enter the tax codes with their respective ID's, the ID should be on the left, with the tax rate on the right as seen below:

The screenshot shows the 'Lookup Table' configuration in Zapier. It features a table with two columns: 'Tax Code ID' and 'Tax Rate %'. The first row contains the values '5' and '15'. Below the table, there is a 'Fallback Value' field set to '0'. A note states: 'The table that will be used for the lookup - keys on the left and values on the right.'

Tax Code ID	Tax Rate %
5	15

Fallback Value: 0

18. Once you have added all the tax codes required, continue and test the trigger.
19. If the test is successful, add another Action.
20. Search and select 1CRM.
21. Select Create/Update Invoice as the Action Event and Continue.
22. Select your connected 1CRM account.
23. Select Create New Invoice as the Operation:

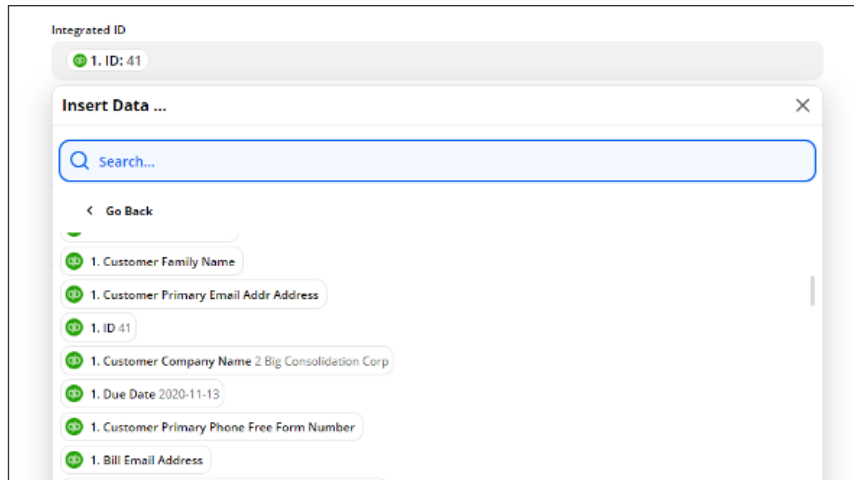
The screenshot shows the 'Customize Invoice' configuration screen. Under the 'Operation' section, 'Create new Invoice' is selected. A note below states: 'You can create a new Invoice, or update an existing one.'

24. You can now continue to map the fields as required. Line items will be marked by QuickBooks as "Lines". (eg. Lines Description – This would be the Line Item Names on 1CRM).
25. Map the Line Item Tax Percentage field to the Utility set up previously:

The screenshot shows the field mapping interface for 'Line Item Tax Percentage 1.0'. A search bar is at the top. Below it, a list of actions is shown: '1. New Invoice in QuickBooks Online', '2. Find Account in zapier-1crm (1.0.8)', and '3. Utilities'. The '3. Utilities' action is selected, and its details are shown below: '3. Lines Salesitemlinedetail Taxcoderef Value: 15, 15'.

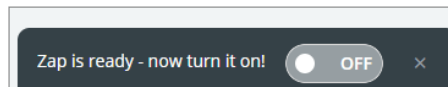
26. Map the Integrated ID field to the Quickbooks Invoice ID field:





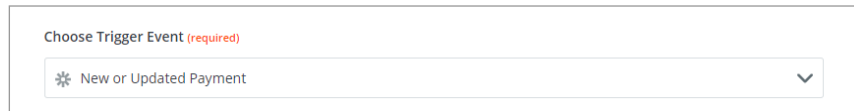
27. Click Continue and test the integration.

28. If the test is successful, activate your Zap:



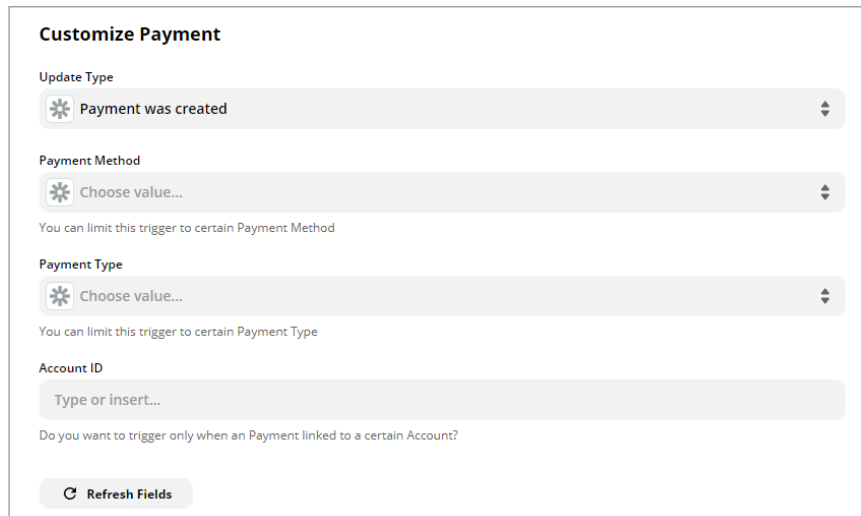
## 3.6 Syncing Payments from 1CRM to Quickbooks Online

1. Login to your Zapier account and create a new Zap.
2. Select 1CRM at the first step "Choose App"
3. Select New or Updated Payment as the Trigger Event.



A screenshot of a dropdown menu titled "Choose Trigger Event (required)". The menu is open, showing a single option: "New or Updated Payment" with a gear icon on the left and a downward arrow on the right.

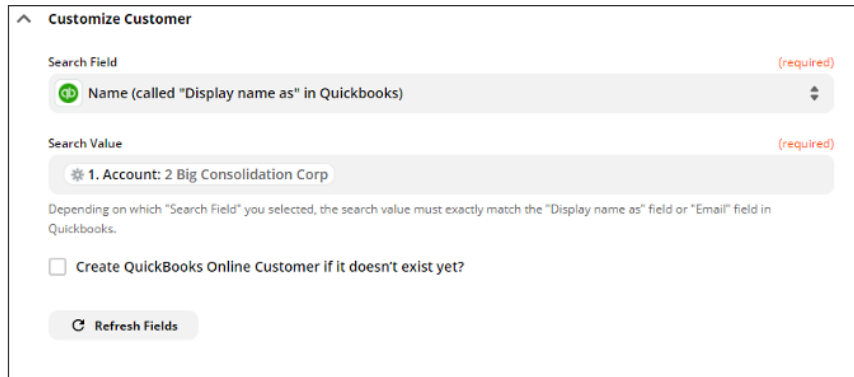
4. Continue and select your linked 1CRM instance.
5. Continue and select Payment was created as the Update Type.
6. Select your required filters if needed:



A screenshot of the "Customize Payment" configuration screen in Zapier. It contains several sections with dropdown menus and a text input field:

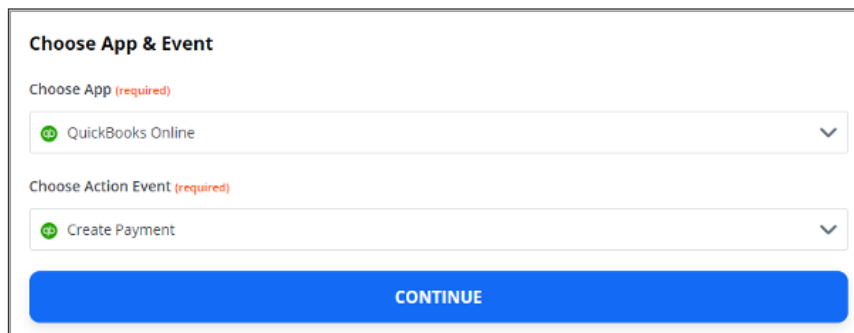
- Update Type:** A dropdown menu with "Payment was created" selected.
- Payment Method:** A dropdown menu with "Choose value..." selected. Below it, a note says "You can limit this trigger to certain Payment Method".
- Payment Type:** A dropdown menu with "Choose value..." selected. Below it, a note says "You can limit this trigger to certain Payment Type".
- Account ID:** A text input field with "Type or insert..." as a placeholder. Below it, a note says "Do you want to trigger only when an Payment linked to a certain Account?".
- At the bottom, there is a "Refresh Fields" button with a circular arrow icon.

7. Continue and test your trigger.
8. If the test was successful, continue and again choose Quickbooks as the App and Find Customer as the Action Event.
9. Continue, select your connected Quickbooks Online account and Continue again.
10. Select Name as the Search Field and map the Search Value to the Account field from 1CRM:



The screenshot shows the 'Customize Customer' form in Zapier. It has two main sections: 'Search Field' and 'Search Value', both marked as '(required)'. The 'Search Field' dropdown is set to 'Name (called "Display name as" in Quickbooks)'. The 'Search Value' dropdown is set to '1. Account: 2 Big Consolidation Corp'. Below these fields, a note states: 'Depending on which "Search Field" you selected, the search value must exactly match the "Display name as" field or "Email" field in Quickbooks.' There is a checkbox labeled 'Create QuickBooks Online Customer if it doesn't exist yet?' which is currently unchecked. At the bottom, there is a 'Refresh Fields' button with a circular arrow icon.

11. Continue and click on Test & Continue.
12. If the test is successful, add another action by clicking on the "+" sign.
13. Choose Quickbooks Online as the App and Create Payment as the Action Event, then click Continue:



The screenshot shows the 'Choose App & Event' form in Zapier. It has two dropdown menus: 'Choose App (required)' and 'Choose Action Event (required)'. The 'Choose App' dropdown is set to 'QuickBooks Online'. The 'Choose Action Event' dropdown is set to 'Create Payment'. At the bottom, there is a large blue button labeled 'CONTINUE'.

14. Select your connected Quickbooks Online account and Continue.
15. Map the fields as required. Customer can be mapped to the ID field returned from the second action. Line items are the related invoices. Note that the line linked invoice field should be mapped to the Related Invoices Integrated ID field:

The amount that has not been applied to pay amounts owed for sales transactions.

**Transaction Date** ⓘ ⓘ

⚙️ 1. Payment Date: 2020-10-14

**Payment Method**

🟢 Credit Card ⌵

**Payment Reference Number**

⚙️ 1. Customer Reference No.: No data

**Deposit To Account**

🟢 Choose value... ⌵

A.K.A. Income Account

**Line Items**

Line Amount 1.0

⚙️ 1. Related Invoices Amount: 112700, 103100

Should not include tax.

**Line Linked Invoice**

⚙️ 1. Related Invoices Integrated ID: null, null ⌵

Only choose an invoice if this payment is linked to one.

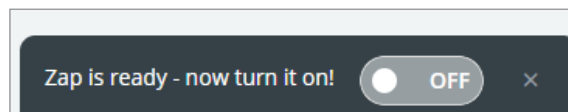
**Memo**

Type or insert...

🔄 Refresh Fields

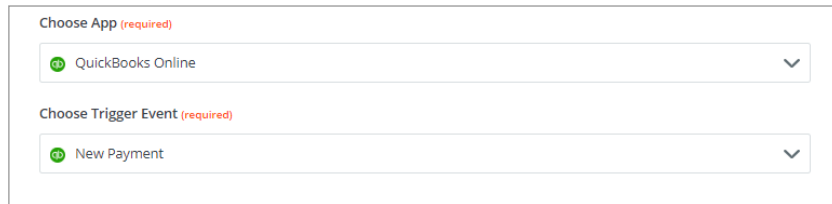
16. Continue and test the integration.

17. If the test is successful, you can activate the Zap by turning it on:



## 3.7 Syncing Payments from Quickbooks Online to 1CRM

1. Login to your Zapier account and create a new Zap.
2. Select Quickbooks Online at the first step "Choose App"
3. Select New Payment as the Trigger Event.



The screenshot shows two dropdown menus. The first is labeled "Choose App (required)" and has "QuickBooks Online" selected. The second is labeled "Choose Trigger Event (required)" and has "New Payment" selected.

4. Continue and select your linked Quickbooks Online instance.
5. Continue and test your trigger.
6. If the test was successful, continue and choose 1CRM as the App and Find Accounts as the Action Event.
7. Continue, select your connected 1CRM account and Continue again.
8. Select Find Account using a filter as the Search Type.
9. At the Search Text field, select the Customer Display Name field from the Quickbooks Online fields list.
10. Continue and test the connection.
11. If the test was successful, continue and choose 1CRM as the App and Create / Update Payment as the Action Event:



The screenshot shows a dropdown menu labeled "Choose Action Event (required)" with "Create / Update Payment" selected.

12. Continue, select your connected 1CRM account and Continue again.
13. Select Create New Payment as the Operation.
14. Map the fields as required. Account should be the account ID retrieved in the second step:



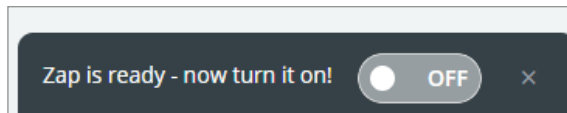
The screenshot shows a field labeled "Account" with a red "(Required)" label. The field contains a value: "2. ID: 35c18252-0bc0-0...00-5eb2aa7c4735".

15. Map the related invoices as shown below:




16. Continue and test the integration.

17. If the test is successful, you can activate the Zap by turning it on:



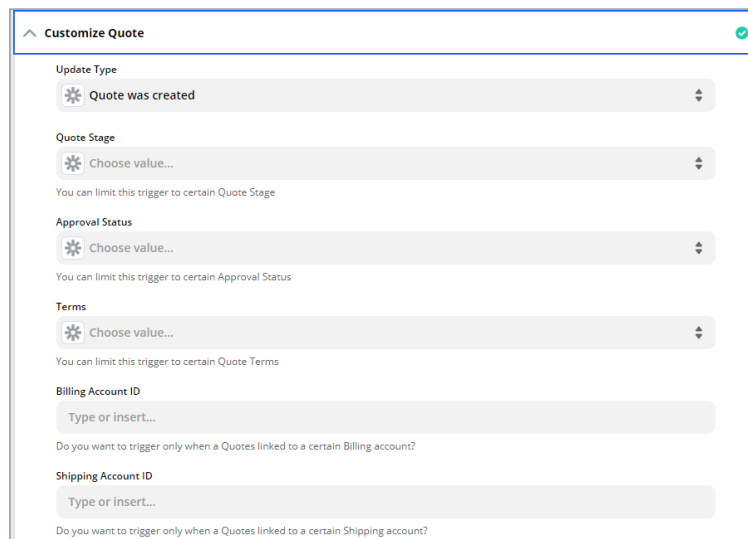
### 3.8 Syncing Quotes from 1CRM to Quickbooks Online

1. Login to your Zapier account and create a new Zap.
2. Select 1CRM at the first step "Choose App".
3. Select "New or Updated Quote" at "Choose Trigger Event".



A screenshot of a dropdown menu titled "Choose Trigger Event (required)". The menu is open, showing a single option: "New or Updated Quote" with a gear icon on the left and a downward arrow on the right.

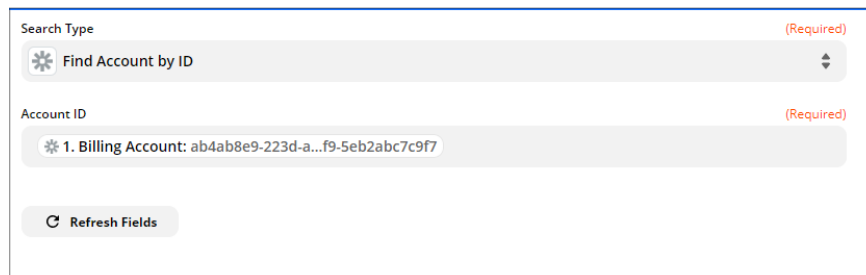
4. Select your linked 1CRM account.
5. Select your filters as required:



A screenshot of the "Customize Quote" configuration screen in Zapier. It features several filter sections, each with a gear icon and a dropdown arrow:

- Update Type:** Set to "Quote was created".
- Quote Stage:** Set to "Choose value...". Below it, a note says "You can limit this trigger to certain Quote Stage".
- Approval Status:** Set to "Choose value...". Below it, a note says "You can limit this trigger to certain Approval Status".
- Terms:** Set to "Choose value...". Below it, a note says "You can limit this trigger to certain Quote Terms".
- Billing Account ID:** A text input field with the placeholder "Type or insert...". Below it, a note says "Do you want to trigger only when a Quotes linked to a certain Billing account?".
- Shipping Account ID:** A text input field with the placeholder "Type or insert...". Below it, a note says "Do you want to trigger only when a Quotes linked to a certain Shipping account?".

6. Test and add another action by clicking on the "+" sign if the test is successful.
7. Choose 1CRM as the App and Find Accounts as the Action Event.
8. Continue, select your connected 1CRM account and Continue again.
9. Select Find Account by ID as the Search Type.
10. Select the Billing Account field as the Account ID:



A screenshot of the "Find Account by ID" configuration screen in Zapier. It includes the following fields:

- Search Type:** A dropdown menu set to "Find Account by ID" with a "(Required)" label.
- Account ID:** A text input field containing "1. Billing Account: ab4ab8e9-223d-a...f9-5eb2abc7c9f7" with a "(Required)" label.
- Refresh Fields:** A button with a circular arrow icon and the text "Refresh Fields".

11. Continue and test the connection.

12. If the test is successful, add another Action by clicking on the “+” sign.
13. Search and select Quickbooks Online from the apps and select Find Customer as the Action Event.
14. Connect your Quickbooks Online account if you have not already done so.
15. Select “Name” as the Search Field and “Name” as the Search value.
16. Continue and test the connection.
17. If the test is successful, add another trigger by clicking on the “+” sign.

The screenshot shows the configuration for a Zapier action. The 'Search Field' dropdown is set to 'Name (called "Display name as" in Quickbooks)' and is marked as '(Required)'. The 'Search Value' dropdown is set to '1. Name: New Account QB -> 1CRM' and is also marked as '(Required)'. Below these, there is a note: 'Depending on which "Search Field" you selected, the search value must exactly match the "Display name as" field or "Email" field in Quickbooks.' There is an unchecked checkbox labeled 'Create QuickBooks Online Customer if it doesn't exist yet?' and a 'Refresh Fields' button. At the bottom, there is a 'Send Data' section with a green checkmark, a 'Done Editing' button, and a red-outlined square containing a blue plus sign (+) to add another action.

18. Select Quickbooks Online as the app and Create Estimate as the Action Event.

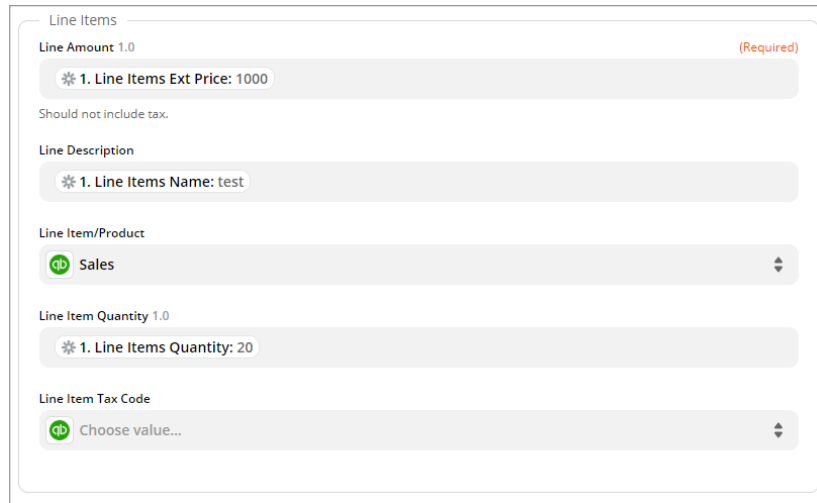
The screenshot shows the configuration for a Zapier action. The 'Choose App (required)' dropdown is set to 'QuickBooks Online'. The 'Choose Action Event (required)' dropdown is set to 'Create Estimate'.

19. Click Continue and select your linked Quickbooks Online account.
20. Select the ID from Quickbooks as the Customer:

The screenshot shows the configuration for a Zapier action. The 'Customer' dropdown is set to '3. ID: 6' and is marked as '(Required)'. Below the dropdown, there is a note: 'Select a specific customer.'

21. Be sure to select the correct values for line items, below is an example if the line item values:





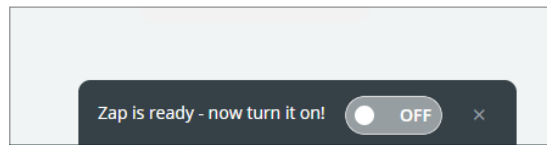
The screenshot shows the 'Line Items' configuration interface in Zapier. It includes several input fields for mapping data from a trigger to a Quickbooks Online action:

- Line Amount 1.0** (Required): A text input field containing '1. Line Items Ext Price: 1000'.
- Line Description**: A text input field containing '1. Line Items Name: test'.
- Line Item/Product**: A dropdown menu with 'Sales' selected.
- Line Item Quantity 1.0**: A text input field containing '1. Line Items Quantity: 20'.
- Line Item Tax Code**: A dropdown menu with 'Choose value...' selected.

Below the 'Line Amount' field, there is a note: 'Should not include tax.'

22. Once all fields are mapped, click Continue, then Test & Continue to write a test quote to Quickbooks Online.

23. If the test is successful, you can now activate the Zap to start your integration:



# 1CRM & ZAPIER

## A Guide to Configuring Zapier Integrations with Xero & Quickbooks Online

