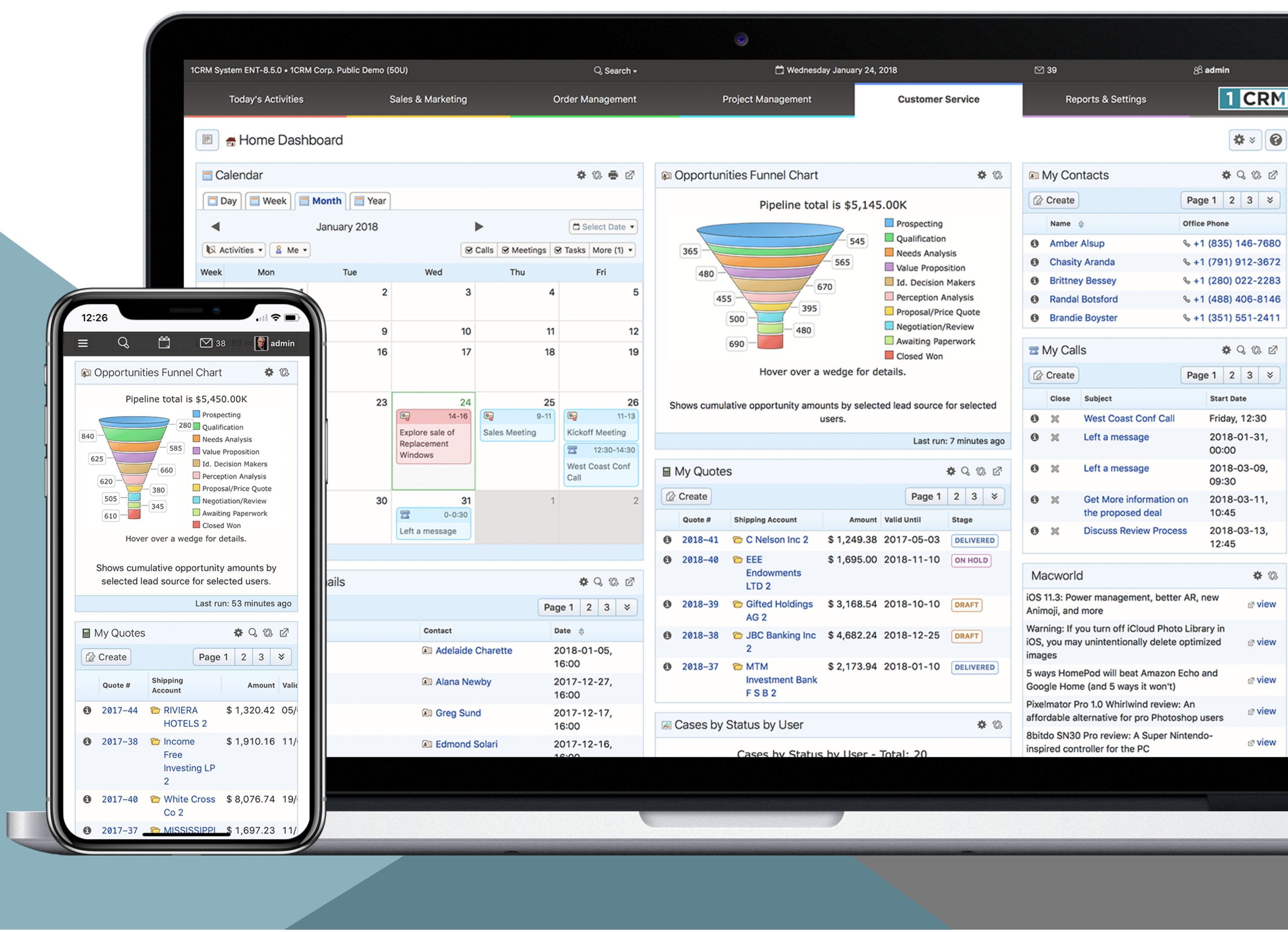
1CRM & ZAPIER

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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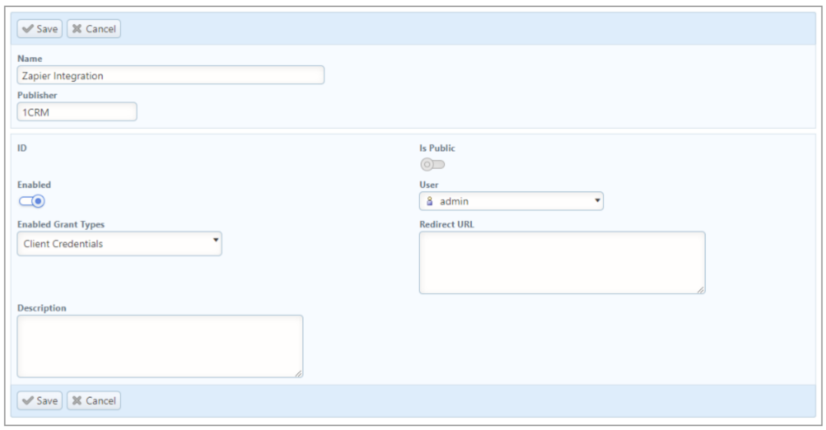
1.0 Connecting to Zapier

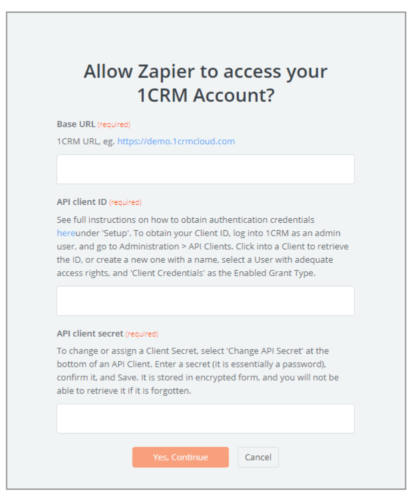
1.1 Creating the API Client in 1CRM.

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:

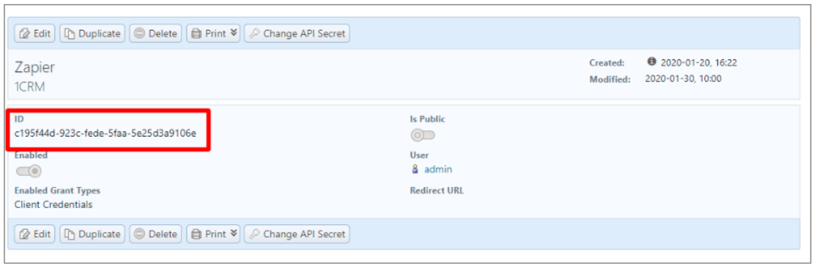


3. View the newly created API Client records and change the API Secret:

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:



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:

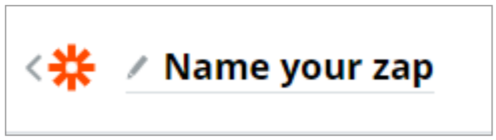


9. API Secret is the secret you entered in step 3.
10. Click Yes, and continue to connect your 1CRM account to Zapier.

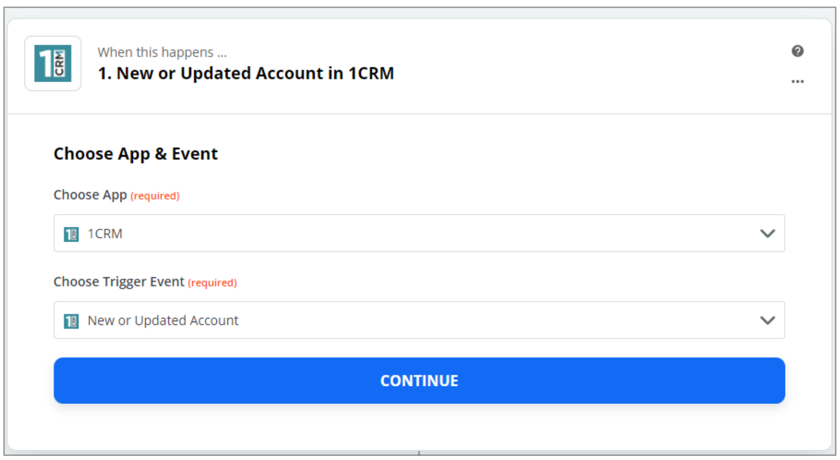
2.0 Integrating with Xero

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)

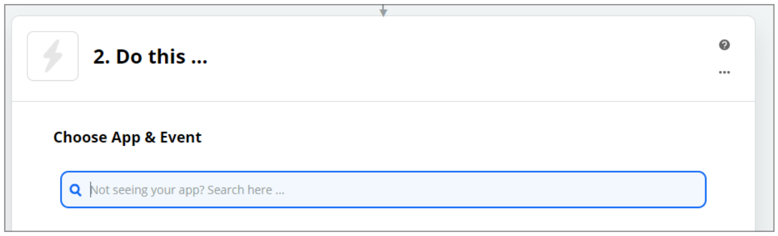


3. Choose the 1CRM app and select New or Updated Account as the Trigger Event:

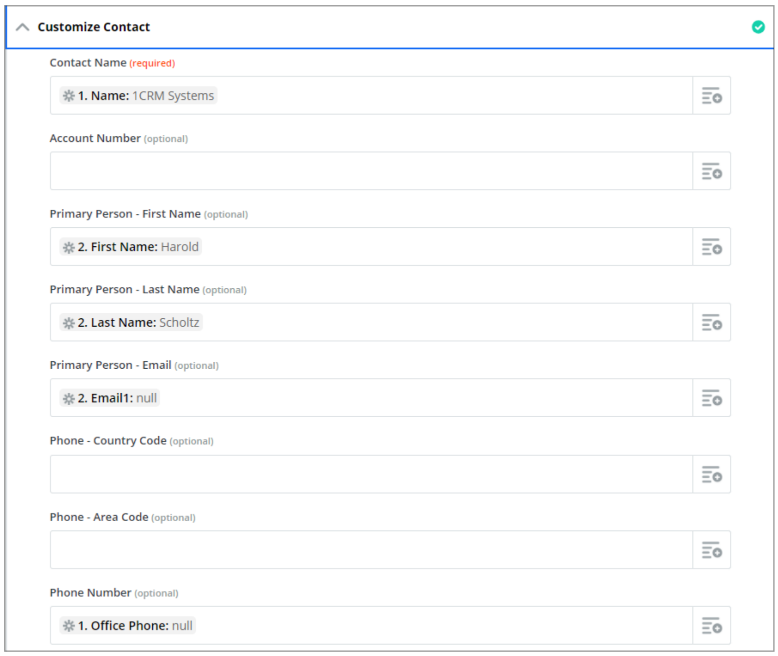


4. Select your linked 1CRM account.
5. Set the Update Type to Account was created.
6. You can now choose to only trigger this for customers:

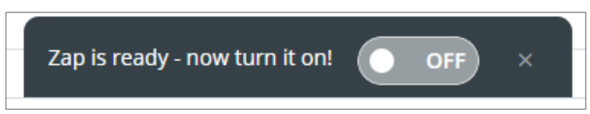
7. Click Continue and have Zapier test the connection to 1CRM.
8. If the test is successful, move on to the first action:



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:



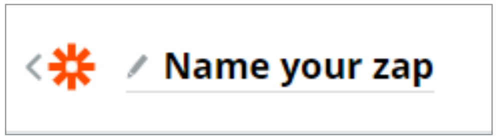
12. Once the fields are mapped, you can now have Zapier test your integration.
13. Is the integration test is successful, you can activate it by turning on your Zap:



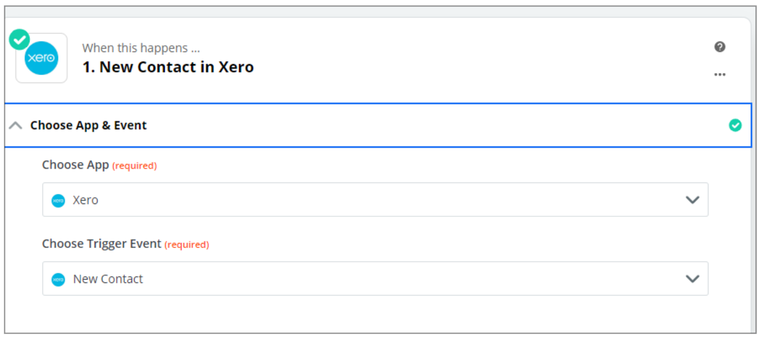
14. Ensure the integration works by creating a new account in 1CRM and confirming creation of the account in Xero.
15. This is an instant integration. All accounts created in 1CRM will be pushed to Xero instantly.

2.2 Syncing New Accounts from Xero to 1CRM

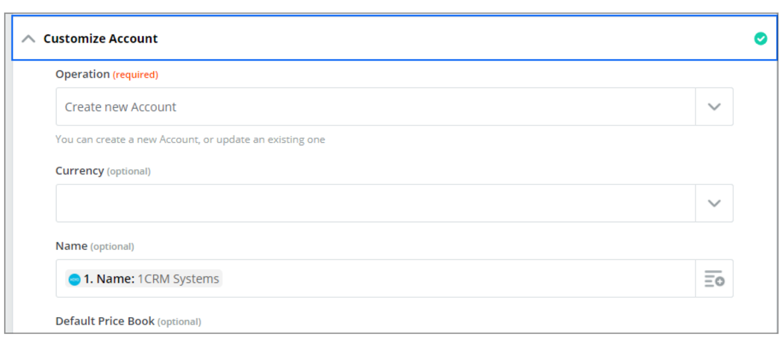
1. Make a new Zap and select Xero as the App.
2. Name your Zap.



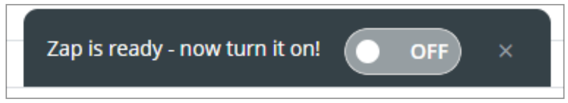
3. Choose New Contact as the trigger event.



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:



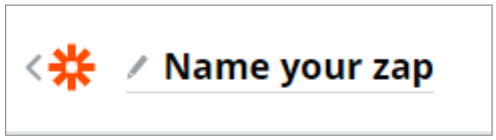
10. Test the integration and ensure the account was created in 1CRM.
11. If the integration is a success, you can activate the Zap on the current screen:



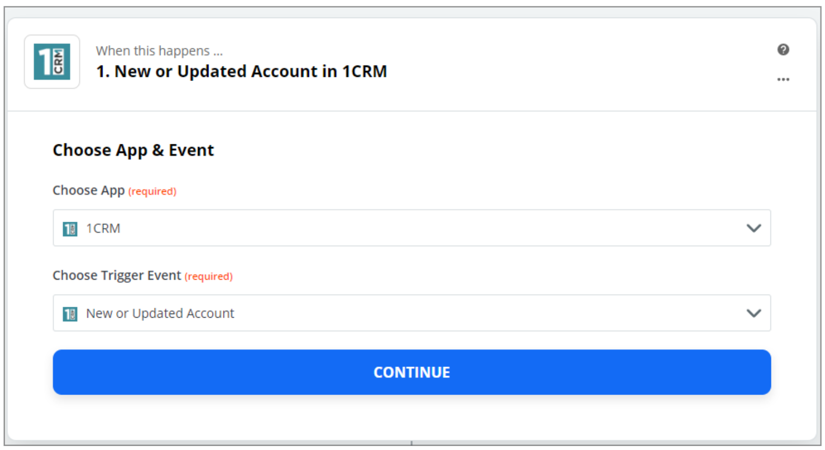
12. Accounts created in Xero will take a few minutes to Sync to 1CRM.

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)

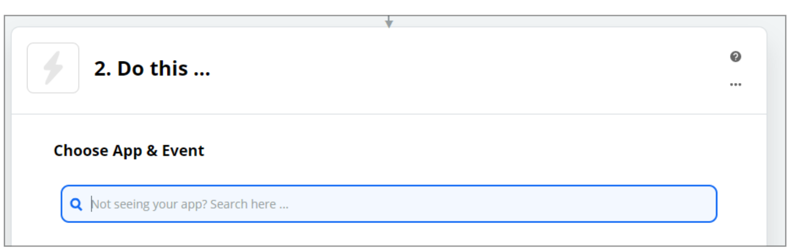


3. Choose the 1CRM app and select New or Updated Account as the Trigger Event:

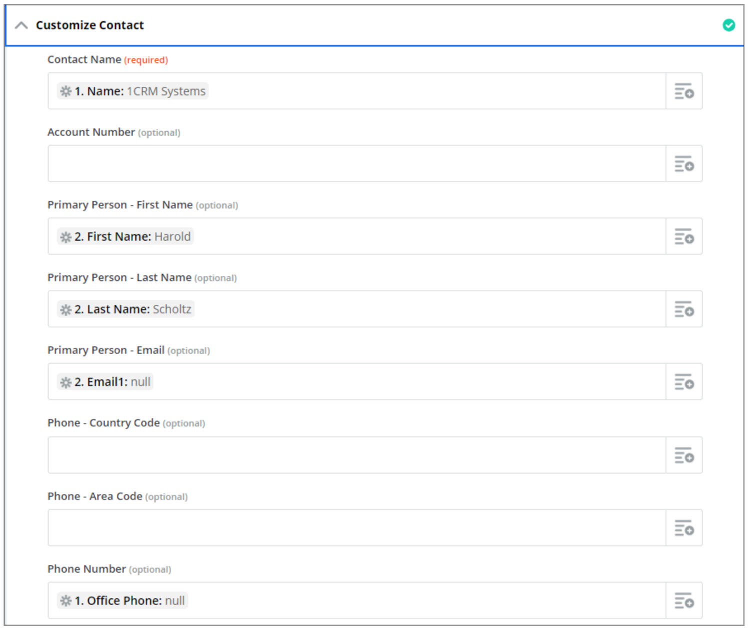


4. Select your linked 1CRM account.
5. Set the Update Type to Account was updated.
6. You can now choose to only trigger this for customers:

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

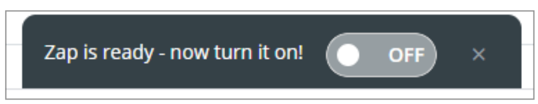


9. Search and select Xero from the apps and select Create/Update Contact as the Action Event.
10. Connect your Xero account if you have not already done so.
11. You can now customize the integrated fields:



*** 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.*

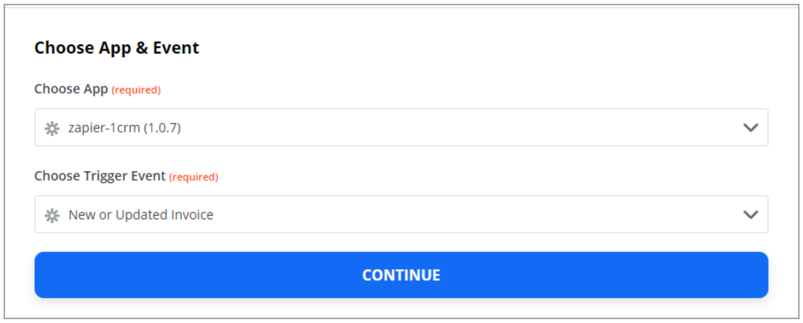
12. Once the fields are mapped, you can now have Zapier test your integration.
13. Is the integration test is successful, you can activate it by turning on your Zap:



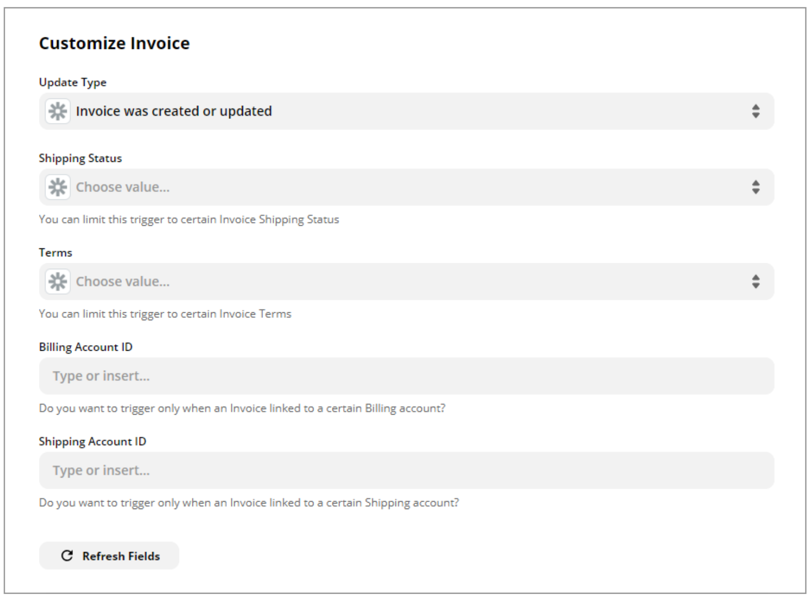
14. Ensure the integration works by updating an account in 1CRM and confirming update in Xero.
15. This is an instant integration. All accounts updated in 1CRM will be pushed to Xero instantly.

2.4 Syncing Invoices from 1CRM to Xero

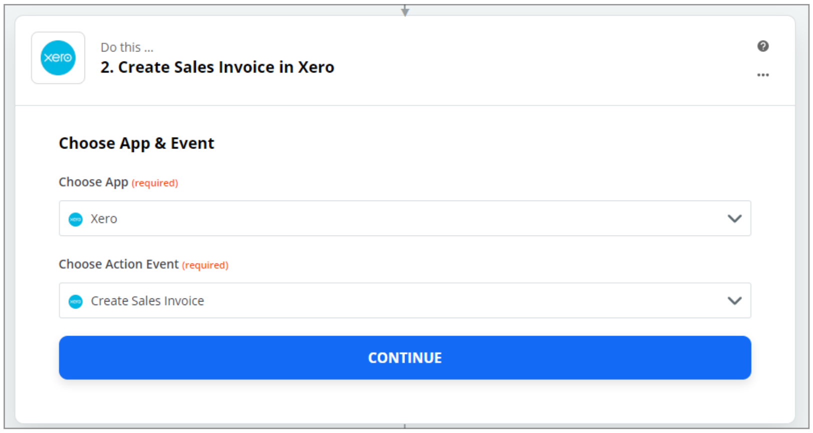
1. Login to your Zapier account and create a new Zap.
2. Select 1CRM at the first step "Choose App".
3. Select "New or Updated Invoice" at "Choose Trigger Event".



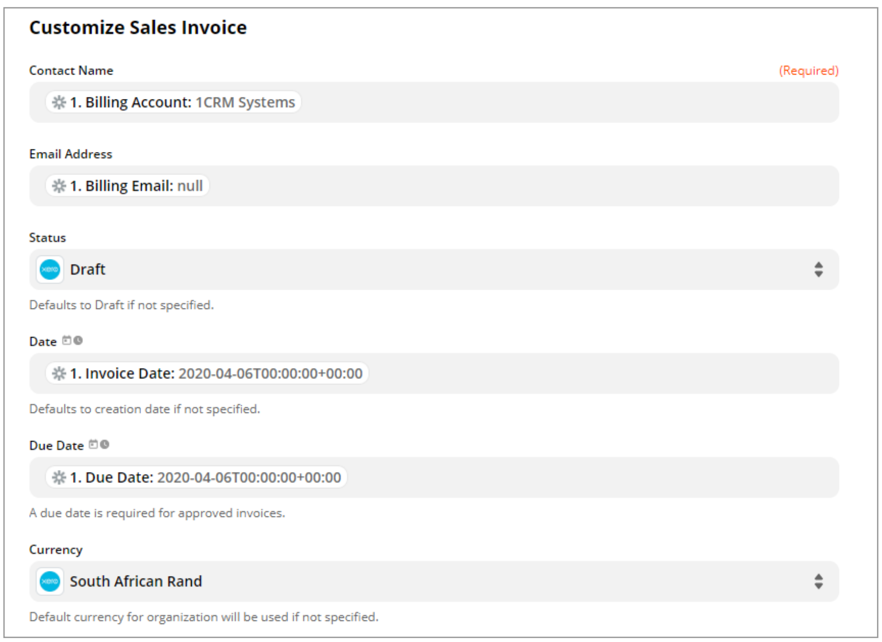
4. Select your linked 1CRM account.
5. Select your filters as required:



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

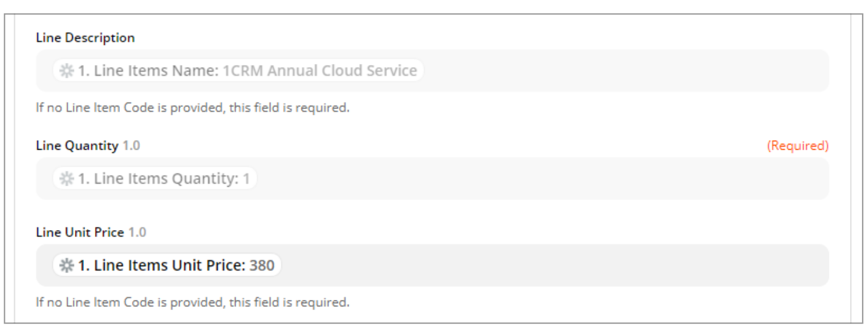


9. Click Continue and select your linked Xero account.
10. Below is an example of the mapped data:



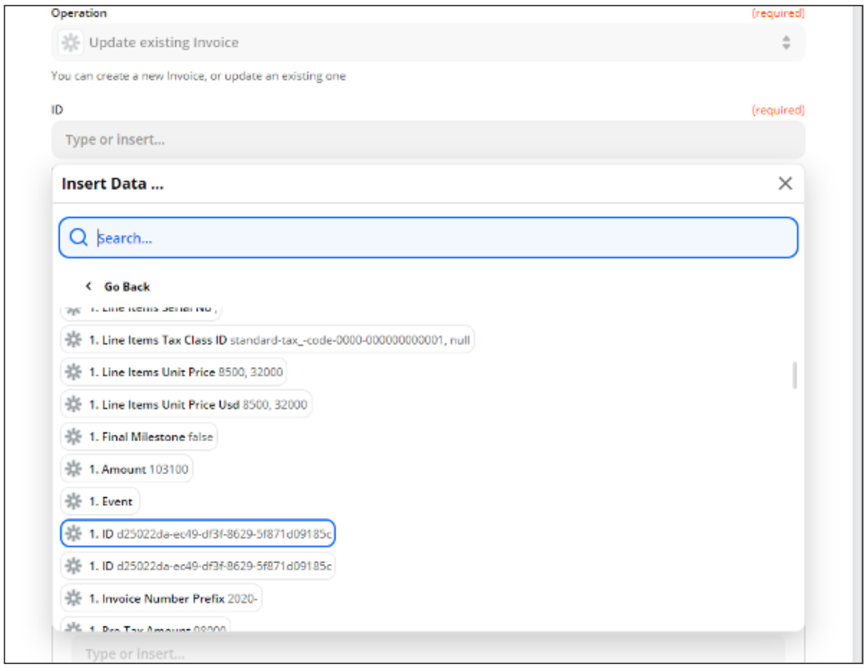
** Note: If Draft status is used, the invoice must be approved in Xero before a payment can be allocated. Alternatively, use Approved as the status.

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

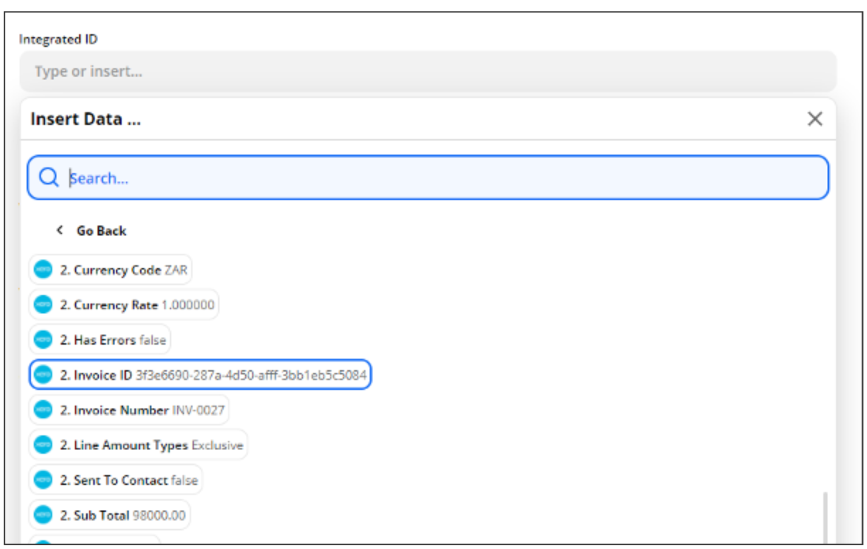


12. Ensure that the correct Line Account Code is selected. (eg. Sales)

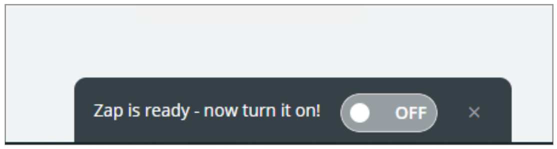
13. Once all fields are mapped, click Continue, then Test & Continue to write a test invoice to Xero.
14. Add a new action and select 1CRM as the app.
15. Select Create / Update Invoice as the Action Event.
16. Continue and select your connected 1CRM account.
17. Continue and select Update Existing Invoice.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



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

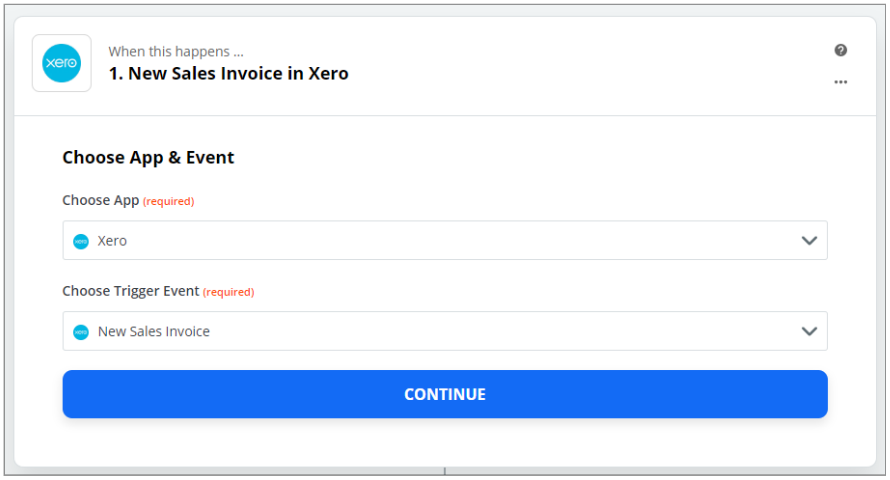


20. Continue and test the invoice update. Make sure that all the previous tests were successful.
21. If the test is successful, you can now activate the Zap to start your integration:

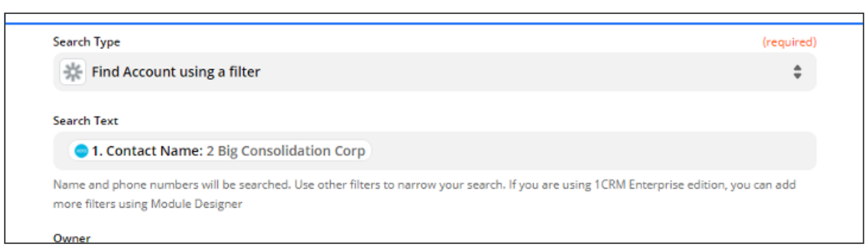

Zap is ready - now turn it on!
OFF

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.

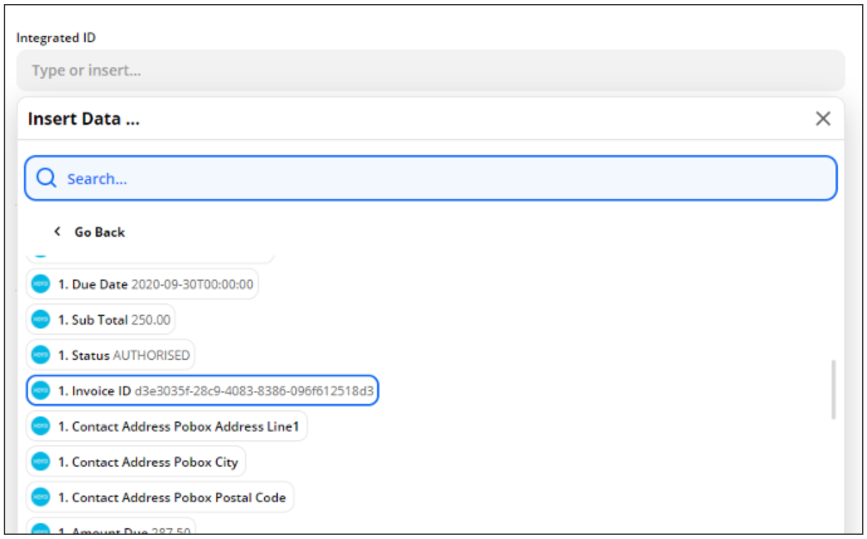


4. Select your connected Xero account or connect a new account.
5. Continue and select an invoice status filter if required.
6. Continue and test the trigger.
7. If the test is successful, continue to the next step.
8. Search and select 1CRM.
9. Select Find Account as the Action Event and Continue.
10.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

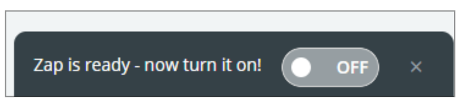


13. Continue and test the trigger, if the account exists in 1CRM, the test will be successful.
14. Add a new action and select 1CRM as the trigger app.
15. Select Create/Update Invoice as the Action Event and Continue.
16. Select your connected 1CRM account.
17. Select Create New Invoice as the Operation:

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:



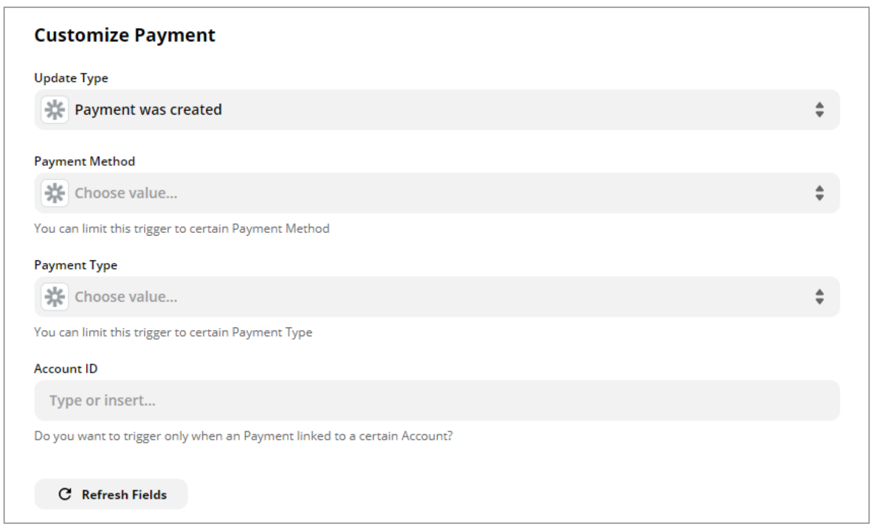
20. Click Continue and test the integration
21. If the test is successful, activate your Zap:



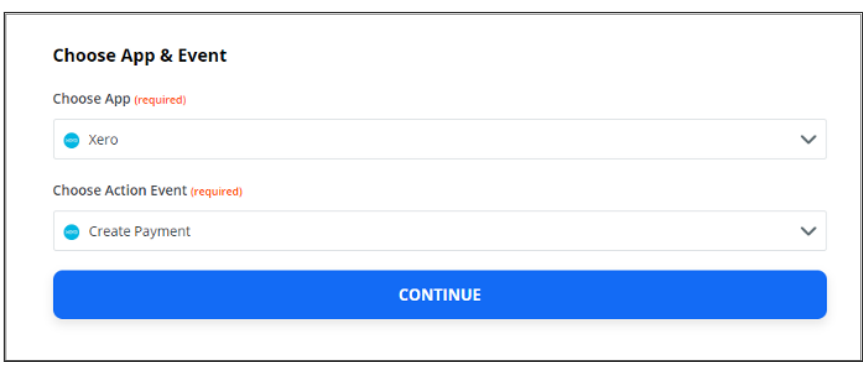
2.6 Syncing Payments from 1CRM to Xero

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.

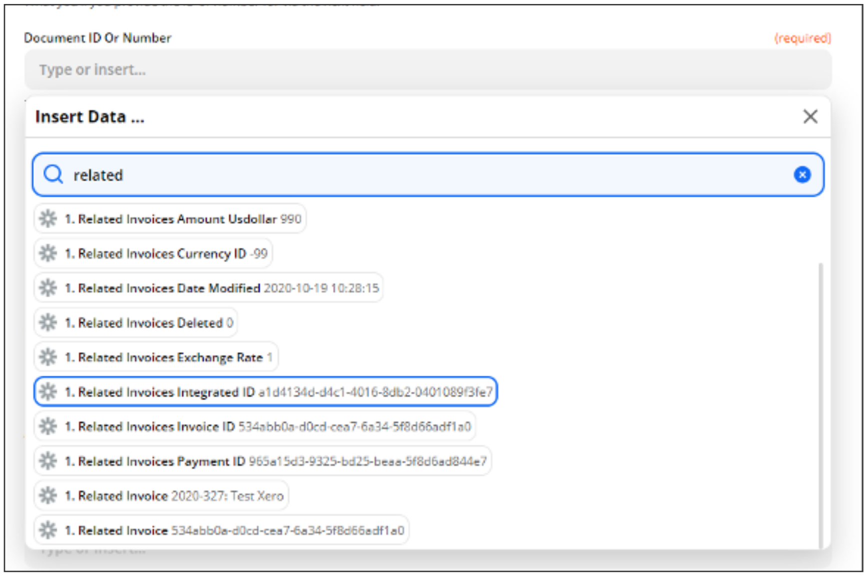
4. Continue and select your linked 1CRM instance.
5. Continue and select Payment was created as the Update Type.
6. Select your required filters if needed:



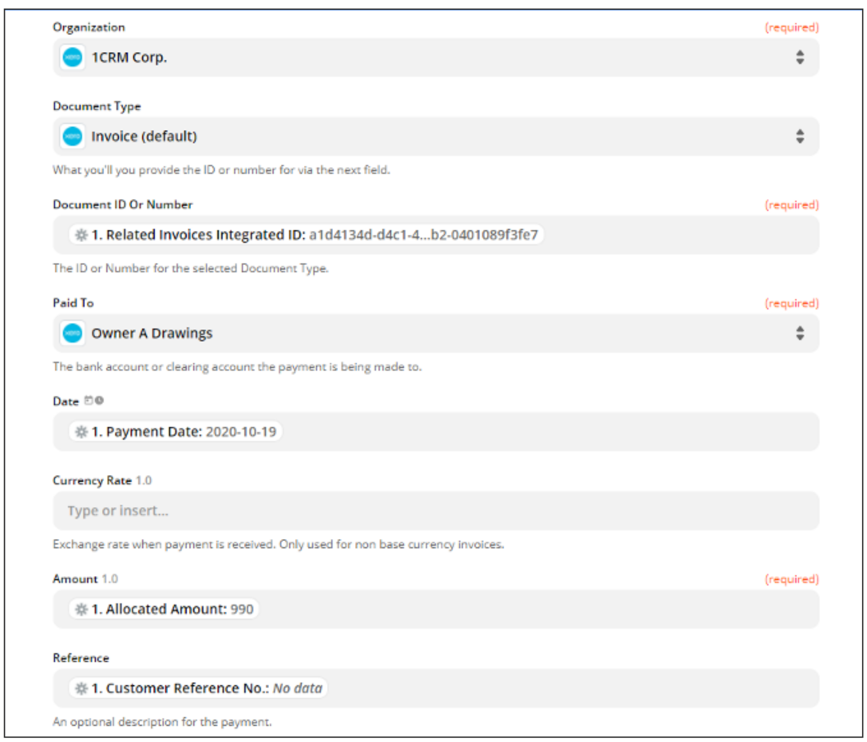
7. Continue and test your trigger.
8. If the test was successful, continue and again choose Xero as the App and Create Payment as the Action Event:



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:

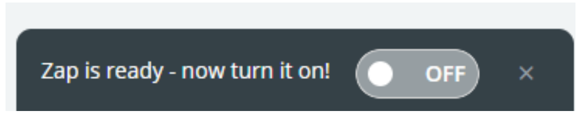


11. Select the Paid To account as required.
12. The date field can be set to the Payment Date field from 1CRM.
13. Set the Amount to the Allocated Amount field from 1CRM.
14. Reference can be set to the Customer Reference No. field from 1CRM.
15. Below is an example of the mapped fields:



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

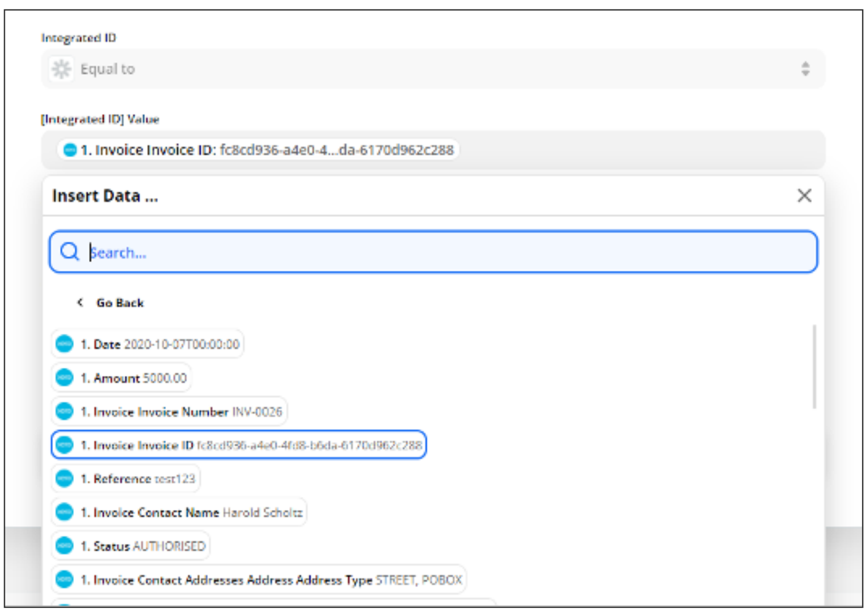
16. Continue and test the integration.
17. If the test is successful, you can activate the Zap by turning it on:


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.

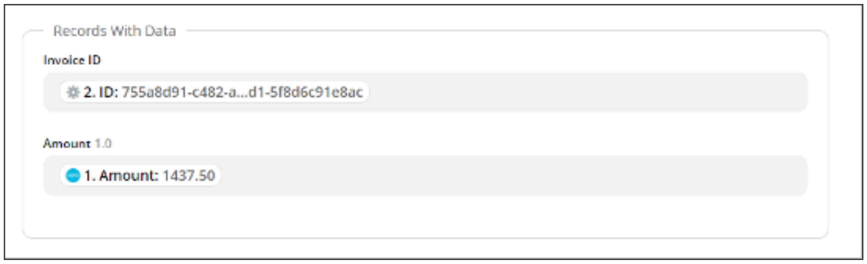
4. Continue and select your linked Xero instance.
5. Continue and select Accounts Receivable as the Payment Type.
6. Continue and test your trigger.
7. If the test was successful, continue and choose 1CRM as the App and Find Invoices as the Action Event.
8. Continue, select your connected 1CRM account 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:



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:

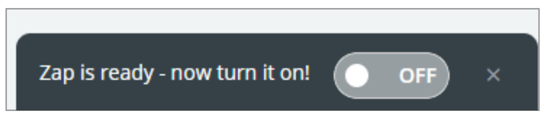
13. Continue, select your connected 1CRM account and Continue again.

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:



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

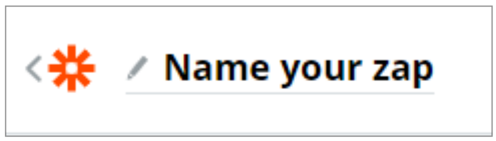
17. Continue and test the integration.
18. If the test is successful, you can activate the Zap by turning it on:



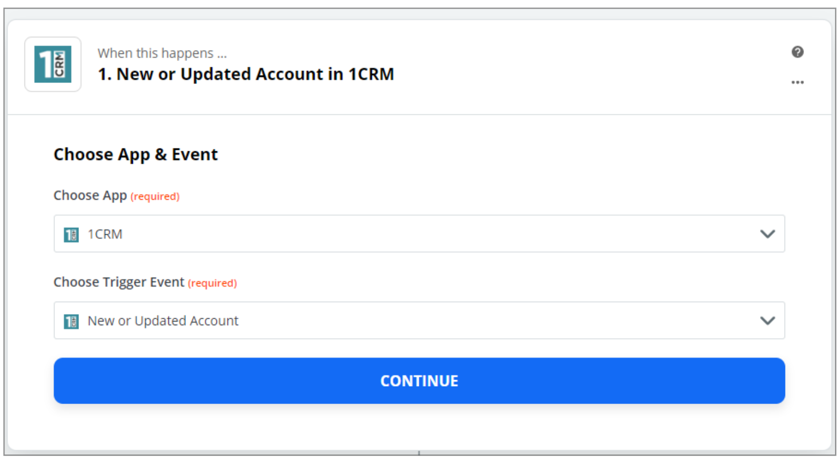
3.0 Integrating with Quickbooks Online

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)

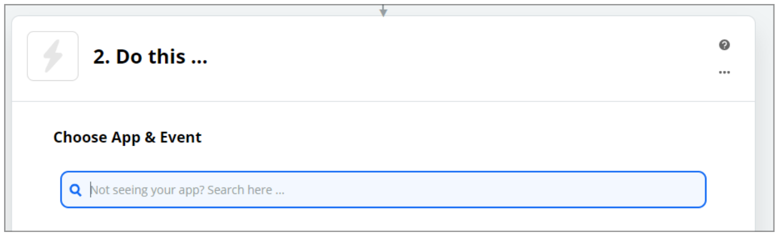


3. Choose the 1CRM app and select New or Updated Account as the Trigger Event:

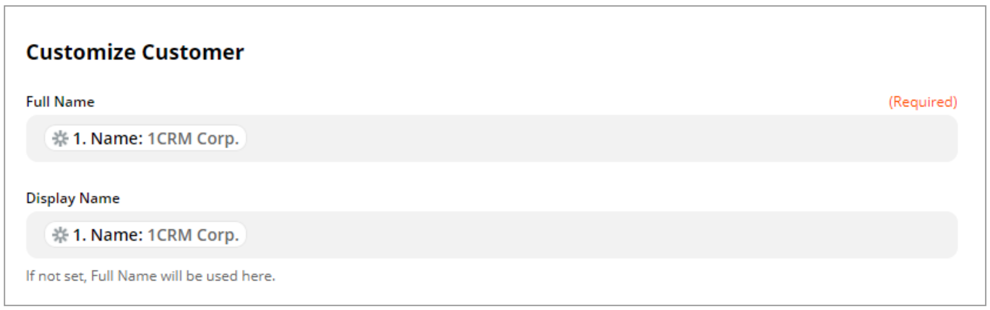


4. Select your linked 1CRM account.
5. Set the Update Type to Account was created.
6. You can now choose to only trigger this for customers:

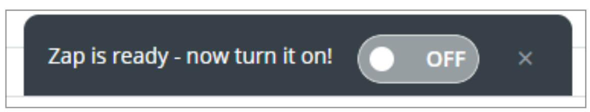
7. Click Continue and have Zapier test the connection to 1CRM.
8. If the test is successful, move on to the first action:



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:



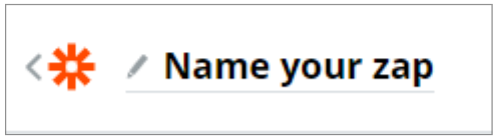
12. Once the fields are mapped, you can now have Zapier test your integration.
13. Is the integration test is successful, you can activate it by turning on your Zap:



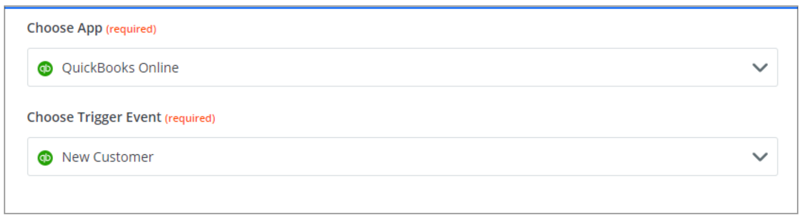
14. Ensure the integration works by creating a new account in 1CRM and confirming creation of the account in Quickbooks Online.
15. This is an instant integration. All accounts created in 1CRM will be pushed to Quickbooks Online instantly.

3.2 Syncing New Accounts from Quickbooks Online to 1CRM

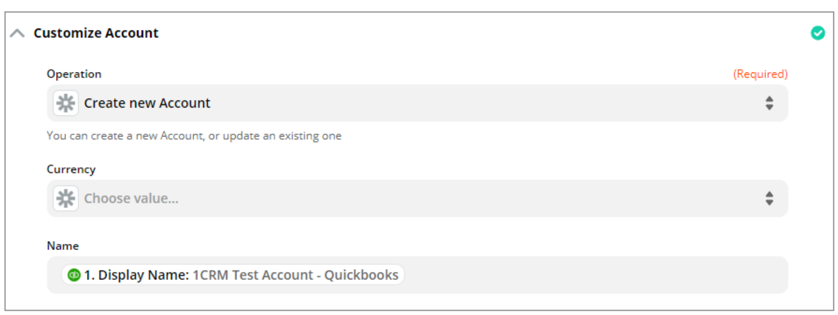
1. Make a new Zap and select QuickBooks as the App.
2. Name your Zap.



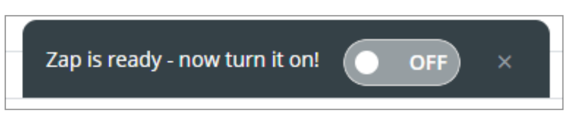
3. Choose New Customer as the trigger event.



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:



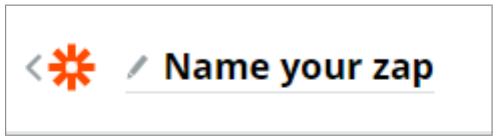
10. Test the integration and ensure the account was created in 1CRM.
11. If the integration is a success, you can activate the Zap on the current screen:



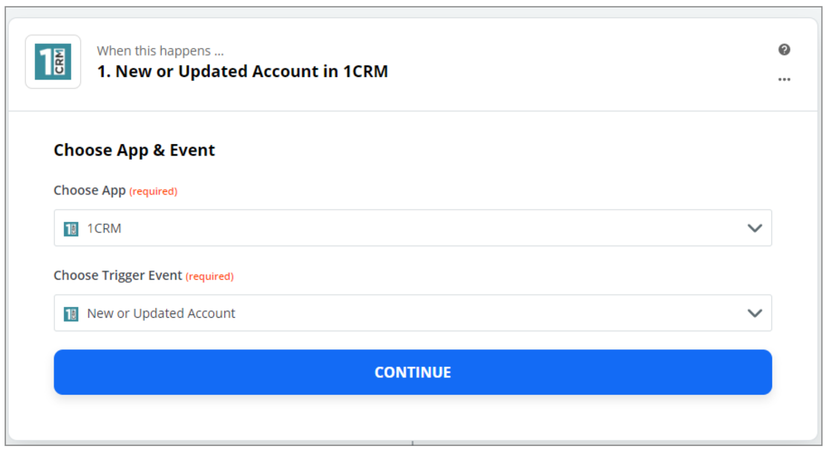
12. Accounts created in Quickbooks Online will take a few minutes to Sync to 1CRM.

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).

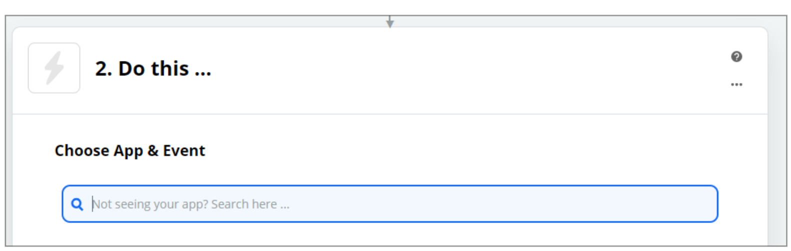


3. Choose the 1CRM app and select New or Updated Account as the Trigger Event:

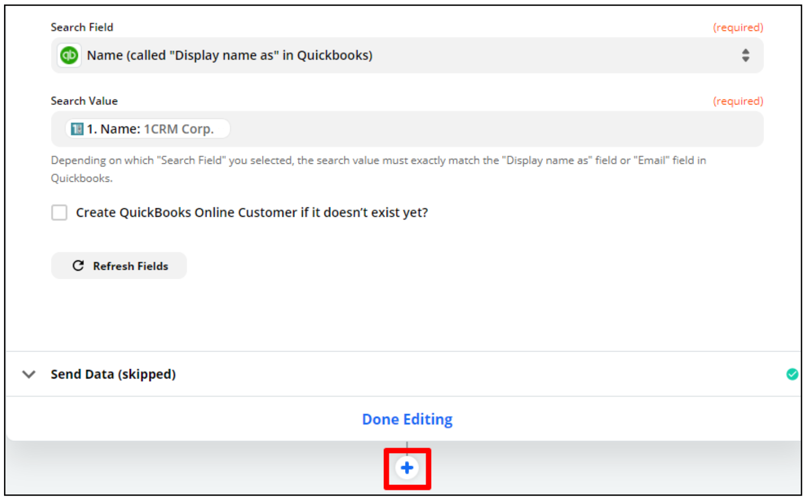


4. Select your linked 1CRM account.
5. Set the Update Type to Account was updated.
6. You can now choose to only trigger this for customers:

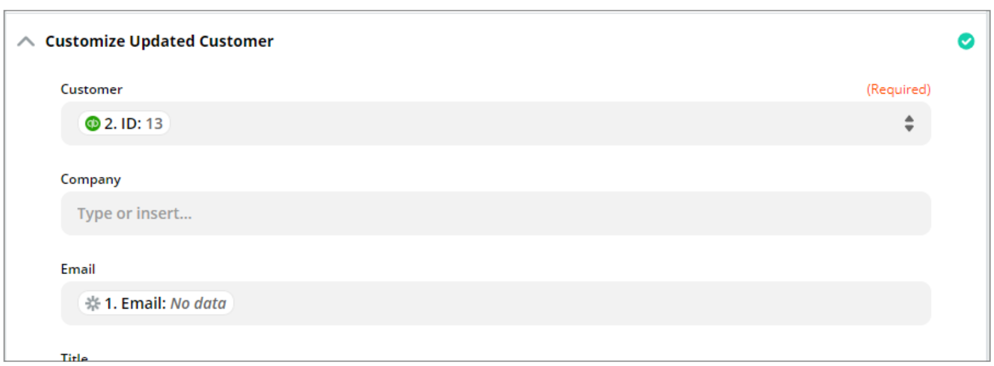
7. Click Continue and have Zapier test the connection to 1CRM.
8. If the test is successful, move on to the first action:



9. Search and select Quickbooks Online from the apps and select 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.

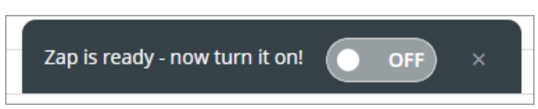


14. Select the Quickbooks Online app again and choose Update Customer as the Action Event.
15. Continue and select your connected Quickbooks Online account, continue again.
16. You can now customize the integrated fields:



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

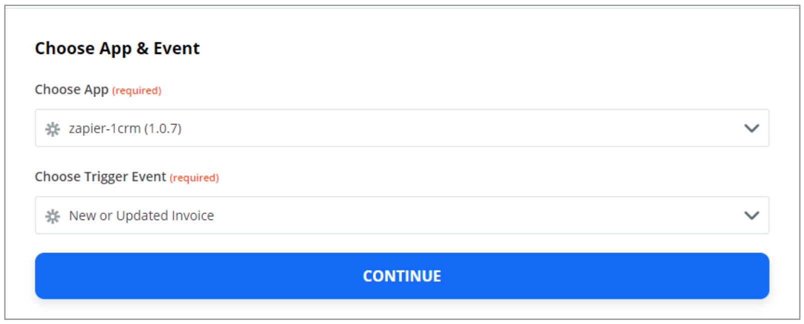
17. Once the fields are mapped, you can now have Zapier test your integration.
18. Is the integration test is successful, you can activate it by turning on your Zap:



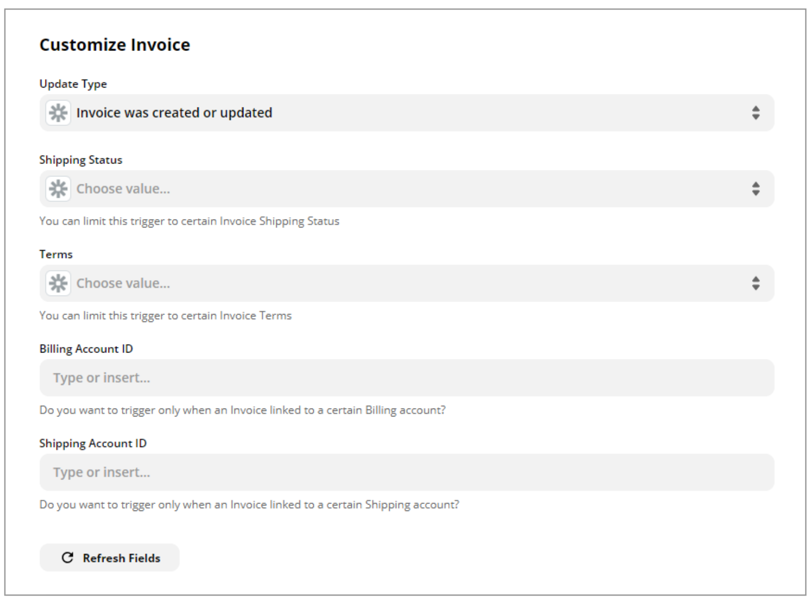
19. Ensure the integration works by updating an account in 1CRM and confirming update in Quickbooks Online.
20. This is an instant integration. All accounts updated in 1CRM will be pushed to Quickbooks Online instantly.

3.4 Syncing Invoices from 1CRM to Quickbooks Online

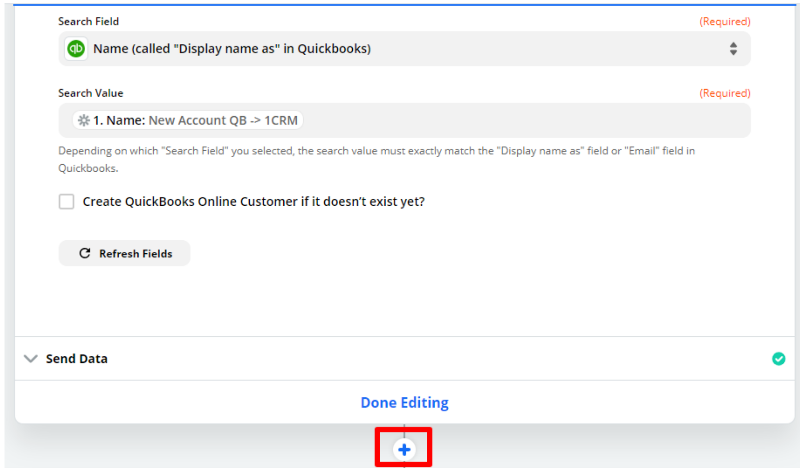
1. Login to your Zapier account and create a new Zap.
2. Select 1CRM at the first step "Choose App".
3. Select "New or Updated Invoice" at "Choose Trigger Event".



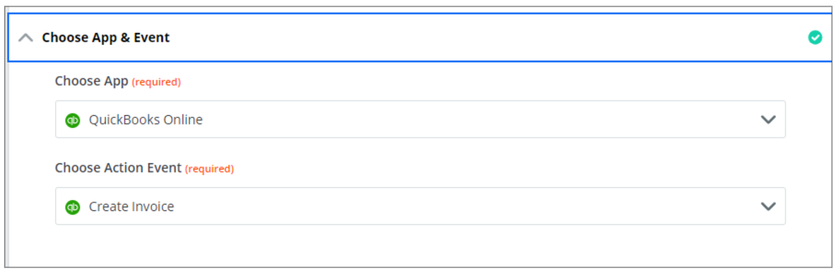
4. Select your linked 1CRM account.
5. Select your filters as required:



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.

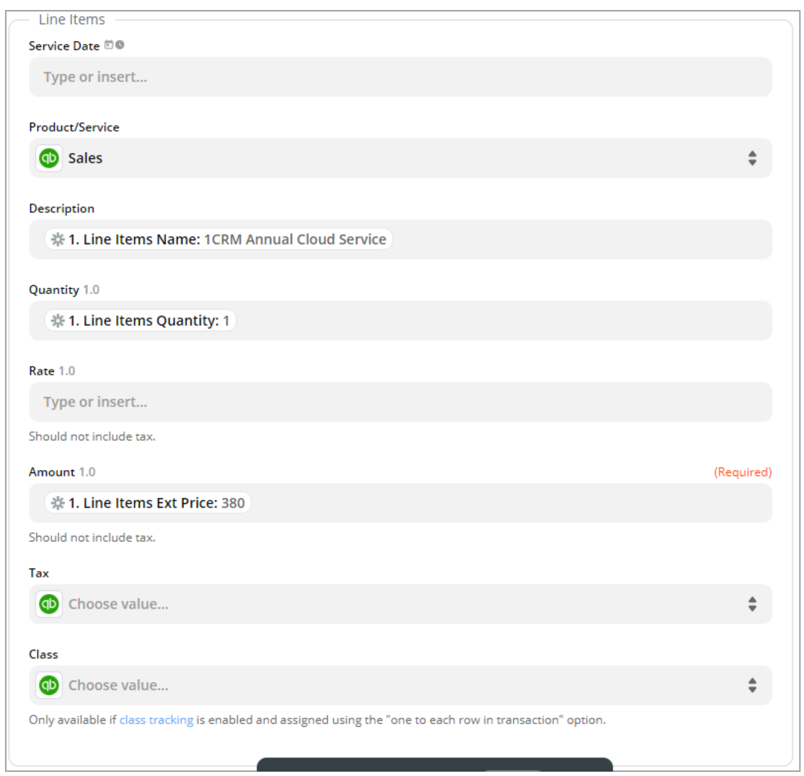


12. Select Quickbooks Online as the app and Create Invoice as the Action Event.



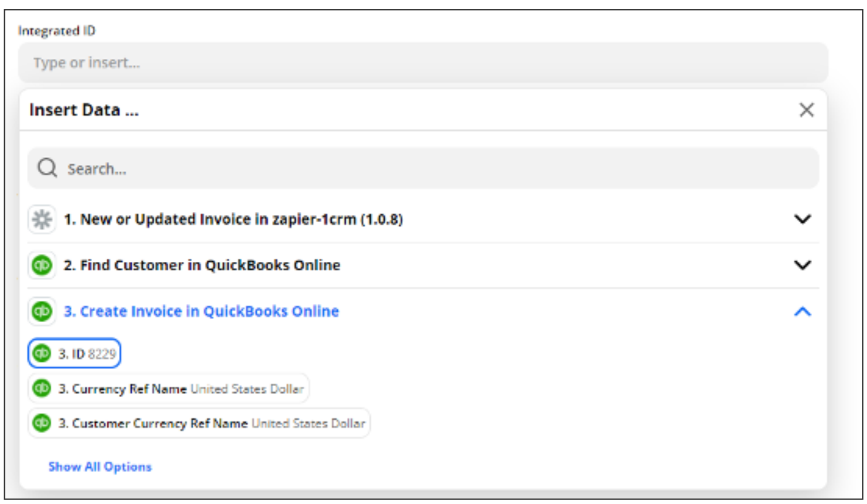
13. Click Continue and select your linked Quickbooks Online account.

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

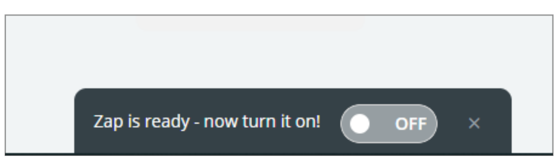


15. Once all fields are mapped, click Continue, then Test & Continue to write a test invoice to Quickbooks Online.
16. Add another Action and select 1CRM as the App, and Create / Update Invoice as the action trigger.
17. Continue and select your linked 1CRM account.
18. Continue and select Update existing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

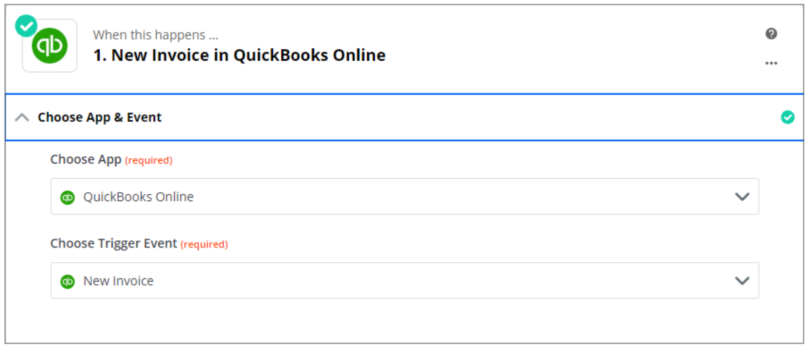


21. Continue and test the update.
22. If the test is successful, you can now activate the Zap to start your integration:

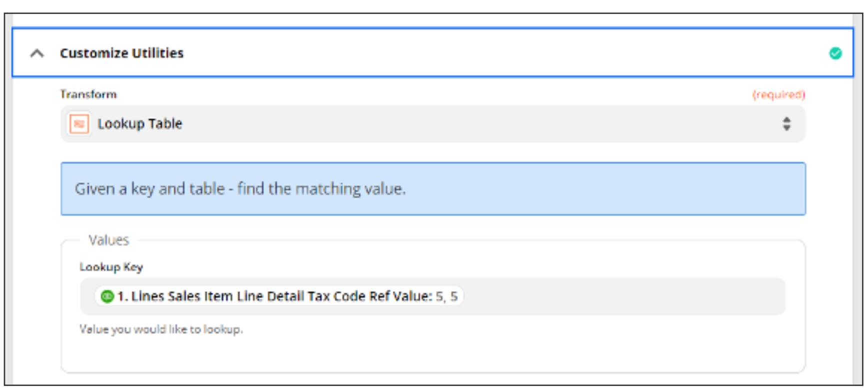


3.5 Syncing Invoices from QuickBooks to 1CRM

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.



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:

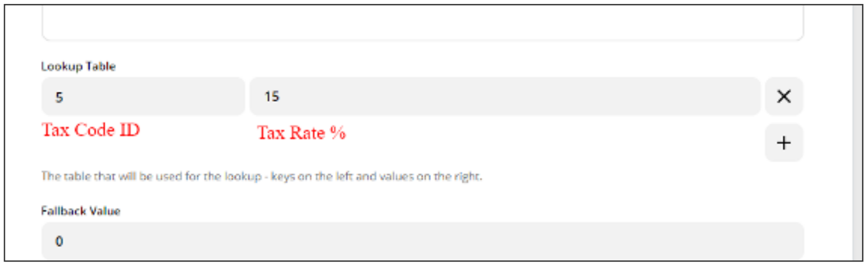


14. We now need to map the Tax Codes in this lookup table by manually retrieving the Tax Code ID in Quickbooks.
15. Open the following link and allow the connection to your Quickbooks account: https://www.1crm.com/qb/auth.php

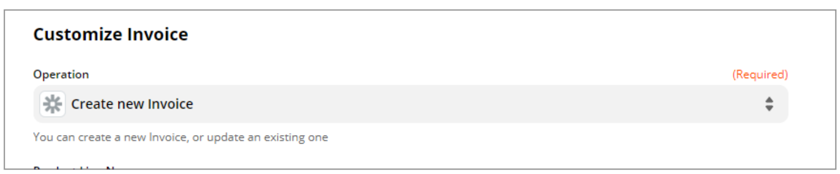
16. Once you have completed your Quickbooks authentication and allowed 1CRM to access Quickbooks, you will find your tax codes displayed as shown below, together with their ID's:

ID: 8
Name: Auto Tax
Description: Auto Tax

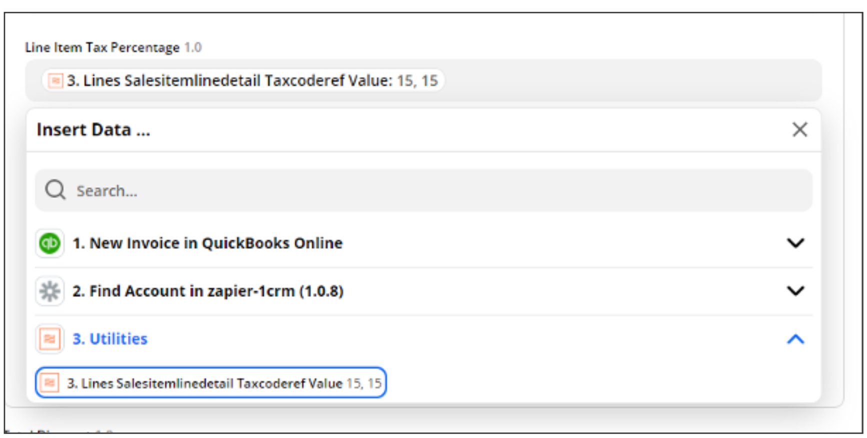
17. Return to your Zapier app, and enter the tax codes with their respective ID's, the ID should be on the left, with the tax rate on the right as seen below:



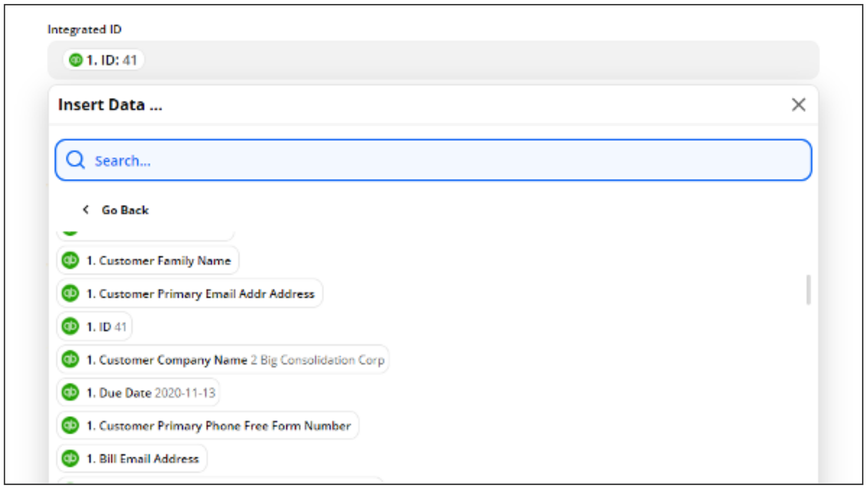
18. Once you have added all the tax codes required, continue and test the trigger.
19. If the test is successful, add another Action.
20. Search and select 1CRM.
21. Select Create/Update Invoice as the Action Event and Continue.
22. Select your connected 1CRM account.
23. Select Create New Invoice as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



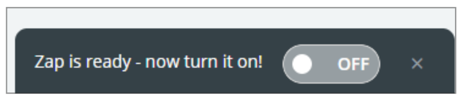
24. You can now continue to map the fields as required. Line items will be marked by QuickBooks as "Lines". (eg. Lines Description – This would be the Line Item Names on 1CRM).
25. Map the Line Item Tax Percentage field to the Utility set up previously:



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



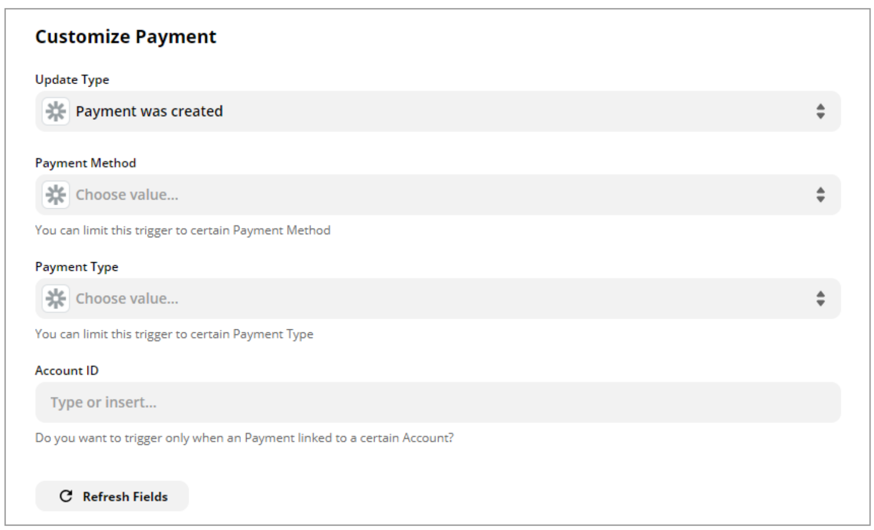
27. Click Continue and test the integration.
28. If the test is successful, activate your Zap:



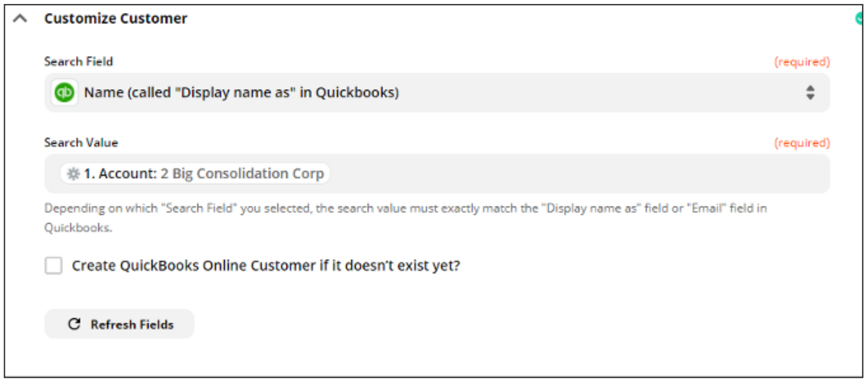
3.6 Syncing Payments from 1CRM to Quickbooks Online

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.

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:

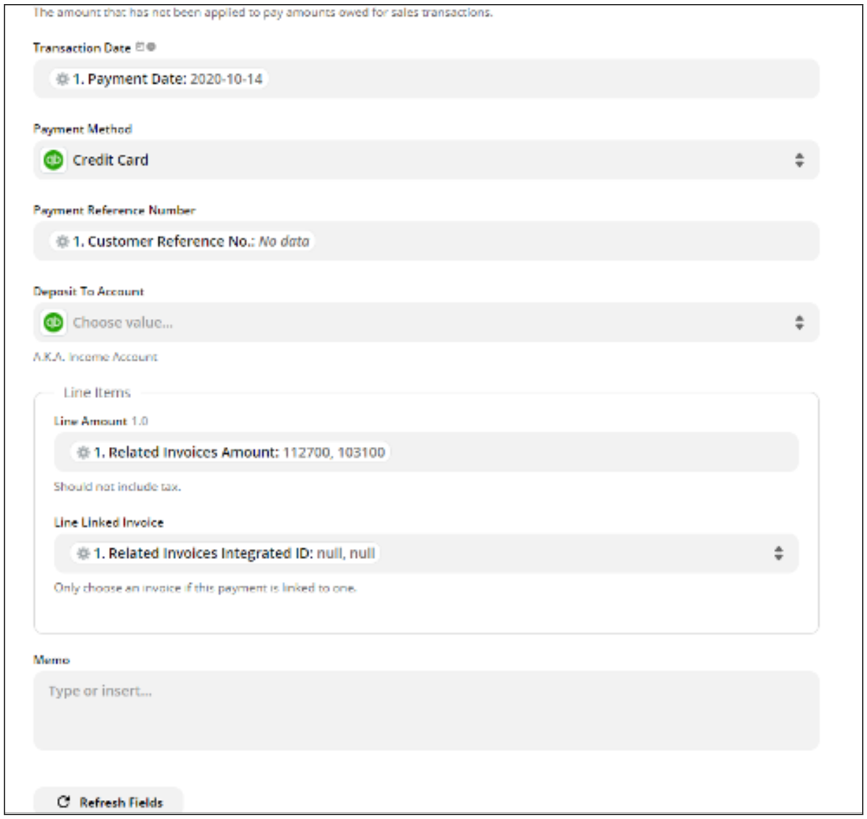


7. Continue and test your trigger.
8. If the test was successful, continue and again choose Quickbooks as the App and Find Customer as the Action Event.
9. Continue, select your connected Quickbooks Online account and Continue again.
10. Select Name as the Search Field and map the Search Value to the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

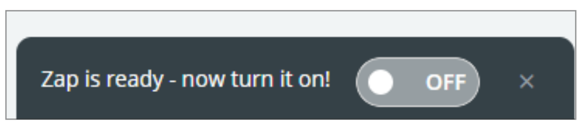


11. Continue and click on Test & Continue.
12. If the test is successful, add another action by clicking on the "+" sign.
13. Choose Quickbooks Online as the App and Create Payment as the Action Event, then click Continue:

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:

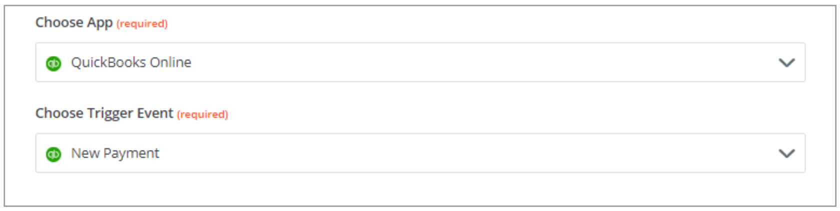


16. Continue and test the integration.
17. If the test is successful, you can activate the Zap by turning it on:



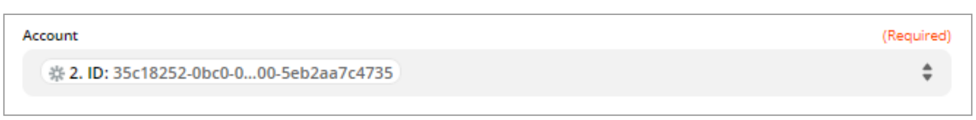
3.7 Syncing Payments from Quickbooks Online to 1CRM

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.

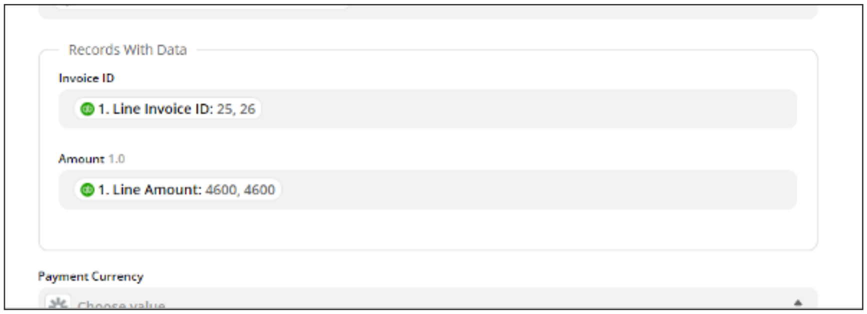


4. Continue and select your linked Quickbooks Online instance.
5. Continue and test your trigger.
6. If the test was successful, continue and choose 1CRM as the App and Find Accounts as the Action Event.
7. Continue, select your connected 1CRM account and Continue again.
8. Select Find Account using 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:

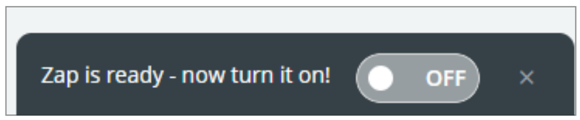
12. Continue, select your connected 1CRM account and Continue again.
13. Select Create New Payment as the Operation.
14. Map the fields as required. Account should be the account ID retrieved in the second step:



15. Map the related invoices as shown below:



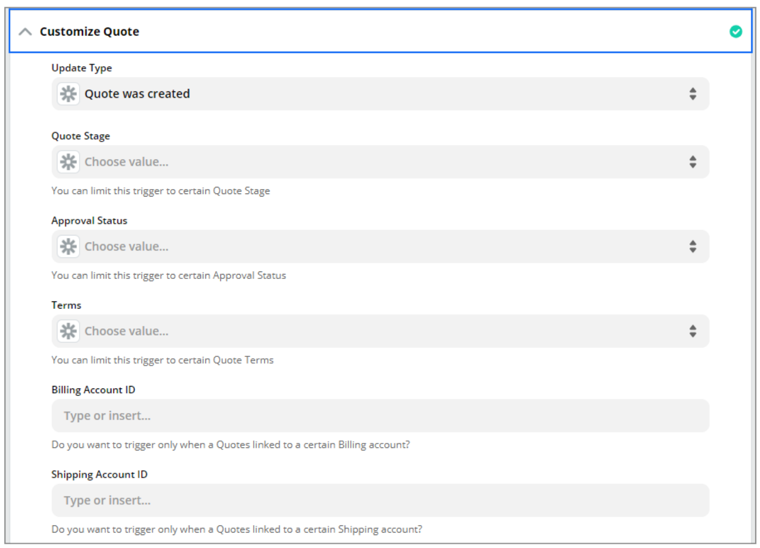
16. Continue and test the integration.
17. If the test is successful, you can activate the Zap by turning it on:



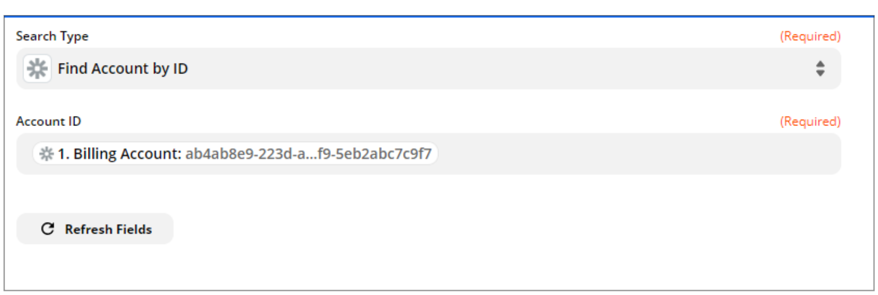
3.8 Syncing Quotes from 1CRM to Quickbooks Online

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”.

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

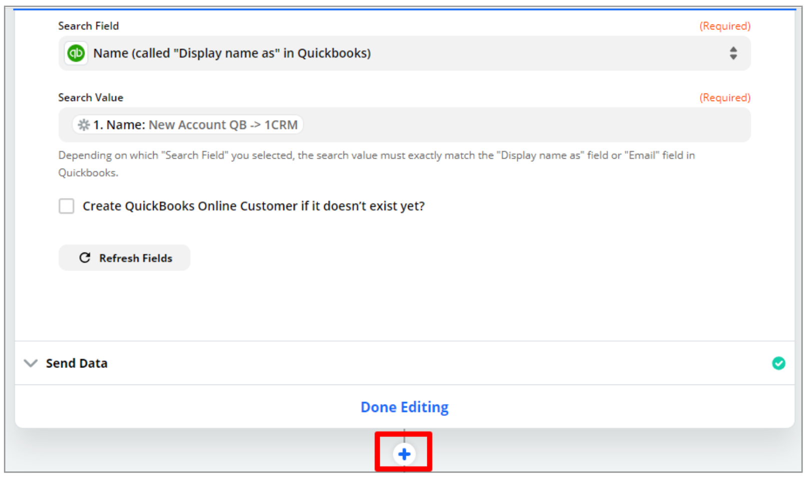


6. Test and add another action by clicking on the “+” sign if the test is successful.
7. Choose 1CRM as the App and Find Accounts as the Action Event.
8. Continue, select your connected 1CRM account and Continue again.
9. Select Find Account by ID as the Search Type.
10. Select the Billing Account field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

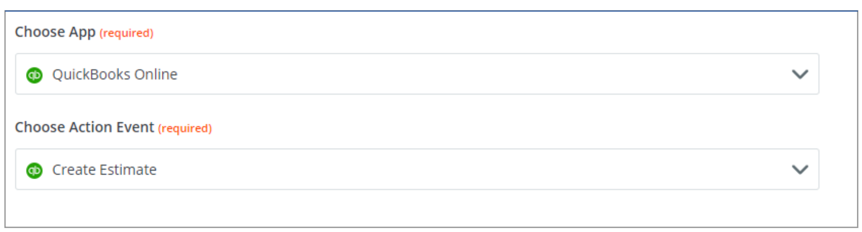


11. Continue and test the connection.

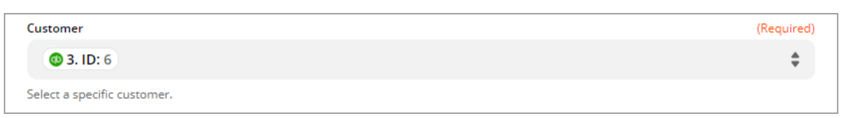
12. If the test is successful, add another Action by clicking on the “+” sign.
13. Search and select Quickbooks Online from the apps and select Find Customer as the Action Event.
14. Connect your Quickbooks Online account if you have not already done so.
15. Select “Name” as the Search Field and “Name”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



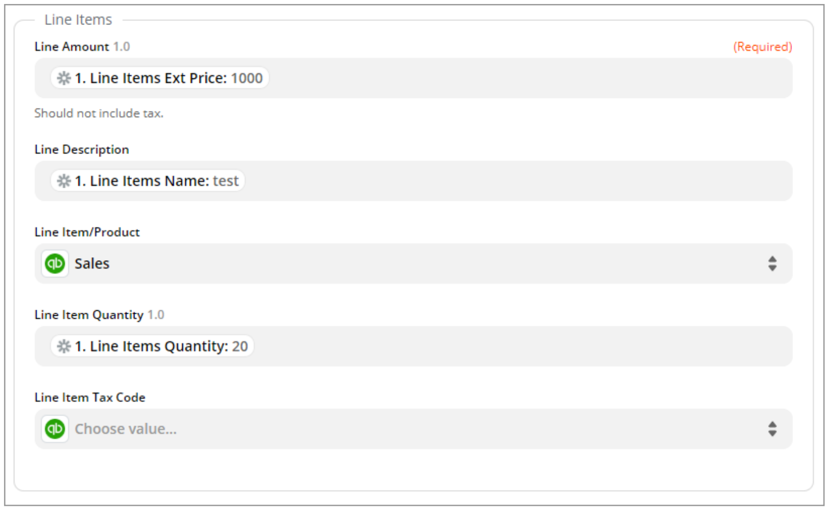
18. Select Quickbooks Online as the app and Create Estimate as the Action Event.



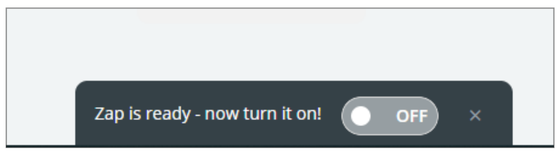
19. Click Continue and select your linked Quickbooks Online account.
20. Select the ID from Quickbooks as the Customer:



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



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