

# zapier simplero.

Case:

Zapier-integration between Simplero and webCRM at Videokursus

Zapier is an integration platform which allows you to connect more than 1500 apps without writing even a snippet of code.

Check out which apps you can access on Zapier her: [Zapier apps](#)

Access webCRM on Zapier by [testing the system for free for 2 weeks](#) or by [logging on to your account](#).

This integration requires a webCRM PLUS or ENTERPRISE license as well as an account with Zapier and Simplero.

## Zapier-integration between Simplero and webCRM at Videokursus

At Videokursus, they are currently using Zapier to connect Simplero and webCRM.

When a customer orders one of Videokursus's services on their website, it is registered in Simplero, which then sends the information through Zapier to webCRM. webCRM automatically generates a follow-up activity for that customer and allocates it to the appropriate webCRM user.

Guide for setting up this zap:

### 1. Create a new zap in Zapier

You choose to create a new Zap in Zapier where Simplero is the "trigger" app. Then select trigger "New purchase in Simplero".

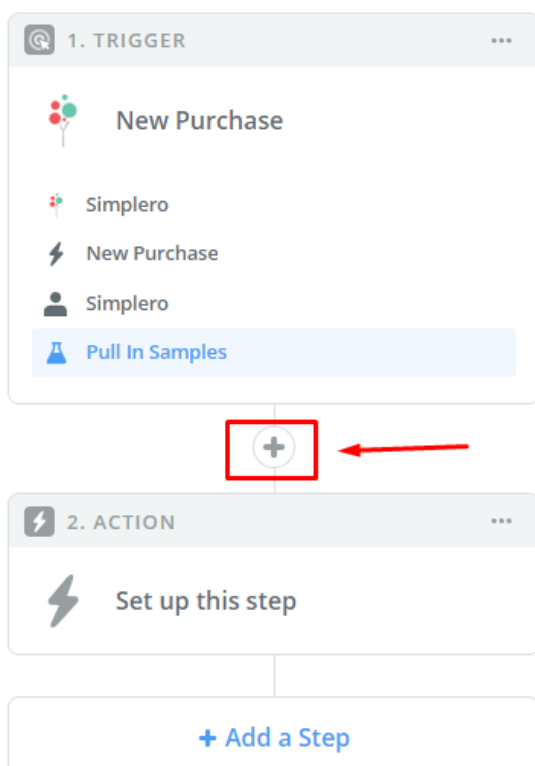
Then connect your Simplero account to Zapier by following the instructions in Zapier.

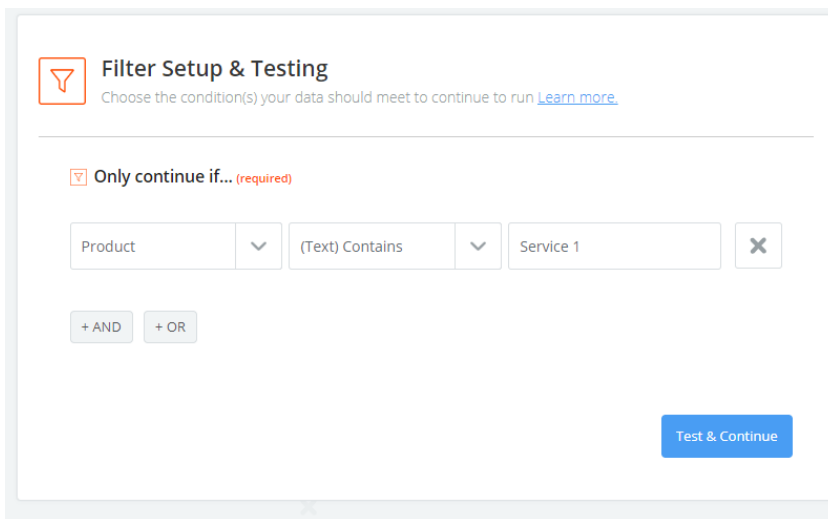
In the next step, you can insert a filter if you want to filter out some orders, if not go to step 3.

### 2. Insert a filter

You need a filter if you just want to send a certain type of order to webCRM or if you want to create different types of follow-up Activities in webCRM depending on the type of order (in that case, you create a "Zap" per type of follow-up).

You add a filter by clicking "+" after the Simplero step in your Zap configuration (see Picture 1). Then select a filter, such as as shown in Picture 2.



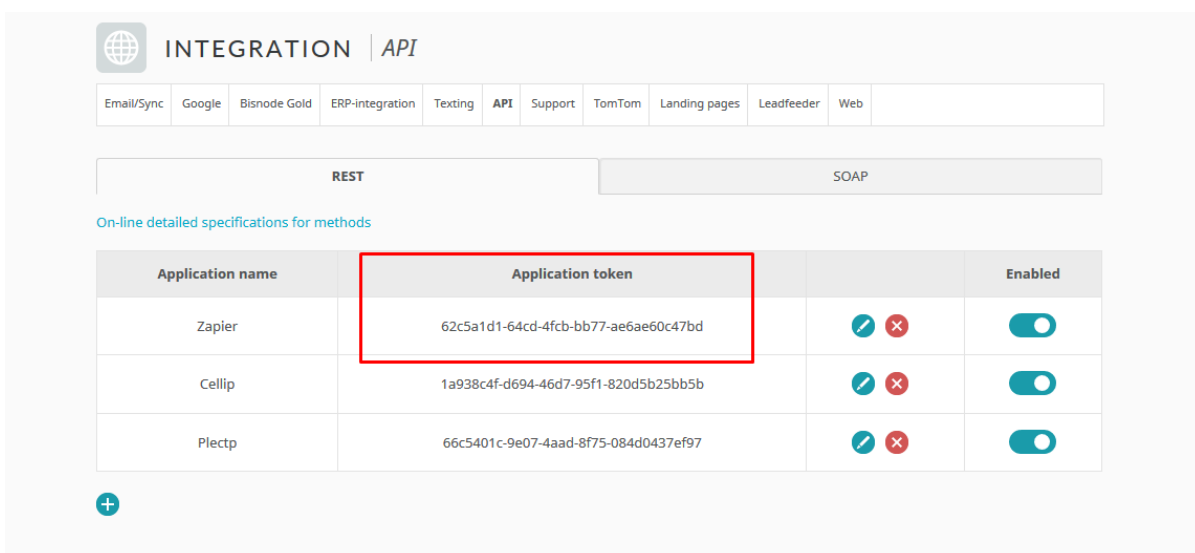


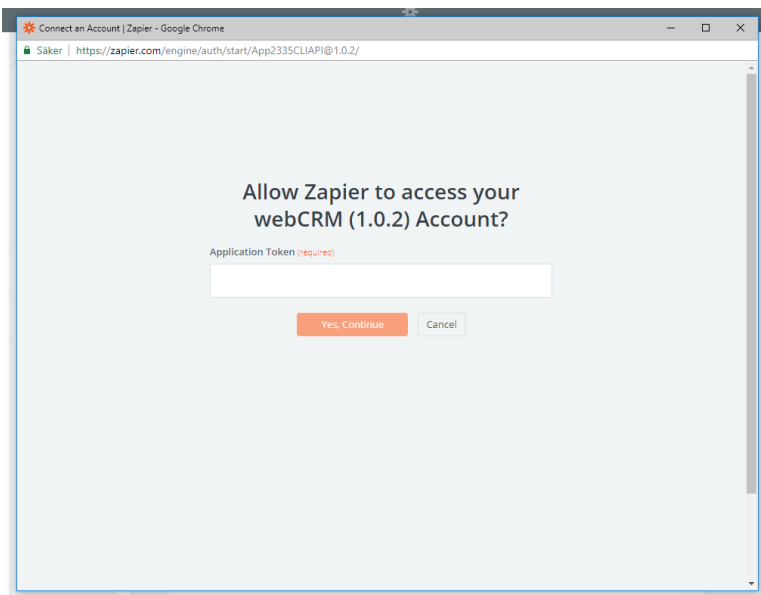
### 3. Connect Zapier to webCRM

Then add a step (click on "Add step") that searches for the order contact in webCRM (Search Person). When you add your webCRM step, connect Zapier to webCRM.

In Zapier you must enter an "API Token". It can be found under System Configuration -> Integration -> API and REST API in webCRM.

Click "+" to create a new "token". Then copy the token and paste into Zapier. See pictures:



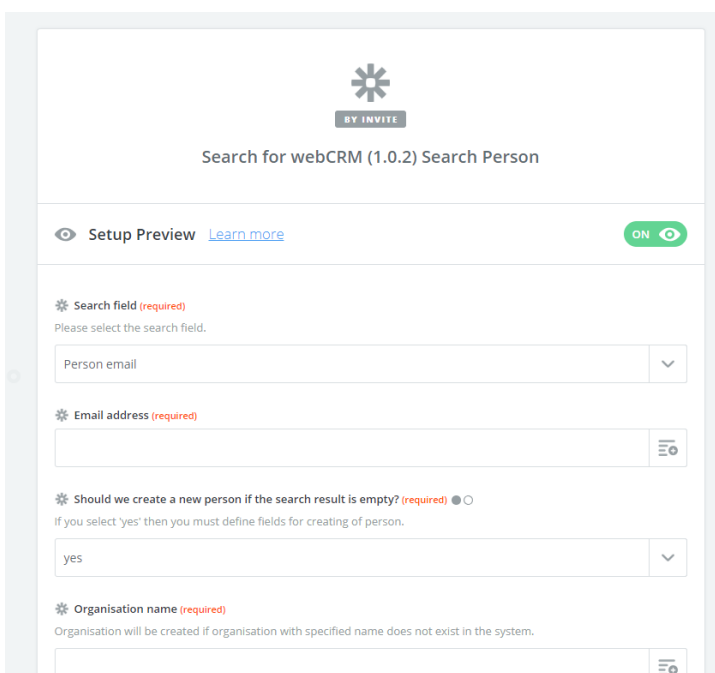


In "Edit options" you decide which information that should be used to search for existing contact person in webCRM (we recommend email address).

In the next box you select which field in Simplero that contains the email address. In the third box, you can choose if the order contact should be created in webCRM if it is not found.

If you choose that a person should be created, you must specify which company the person belongs to. You select the Simplero field containing the Company Name in the "Organization Name" box.

If you do not have a company name from Simplero, you can also select the field containing the contact's name here. But in that case, a company with the contact's name will be created in your webCRM system. See picture:



Finally, add a step to create the activity in webCRM. In the Activity step in Zapier, under "Edit template", choose Organization ID and Person ID "Use a custom value".

In the next box, choose "Organization" information from "Search person" and from there "Organization ID". For Person ID, you do the same, with the difference that you select "ID" instead of "Organization ID". See picture:

**\* Organisation ID (required)** 1 2 3  
Please use the Organisation Search field for defining the search text.

Use a Custom Value (advanced) ▼

**Custom Value for Organisation ID ID (required)**  
Provide the Organisation ID ID, not the Name here. Not sure how to use custom values? [Learn more here.](#)

\* Step 2.1

**\* Person Search (optional)**

Use a Custom Value (advanced) ▼

**Custom Value for Person ID ID (optional)**  
Provide the Person ID ID, not the Name here. Not sure how to use custom values? [Learn more here.](#)

2 \* Search Person

First name	Jørgen
Last name	Rode
Middle name	
Full name	Jørgen Rode
Title	Partner
ID	1

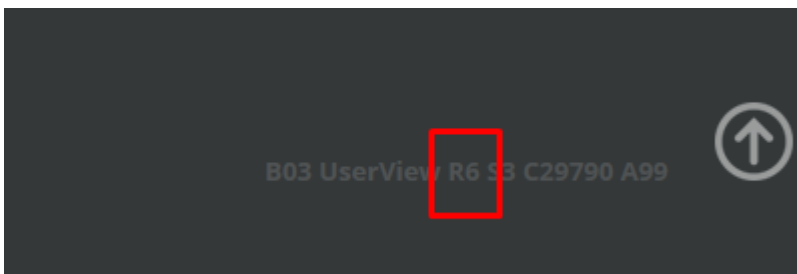
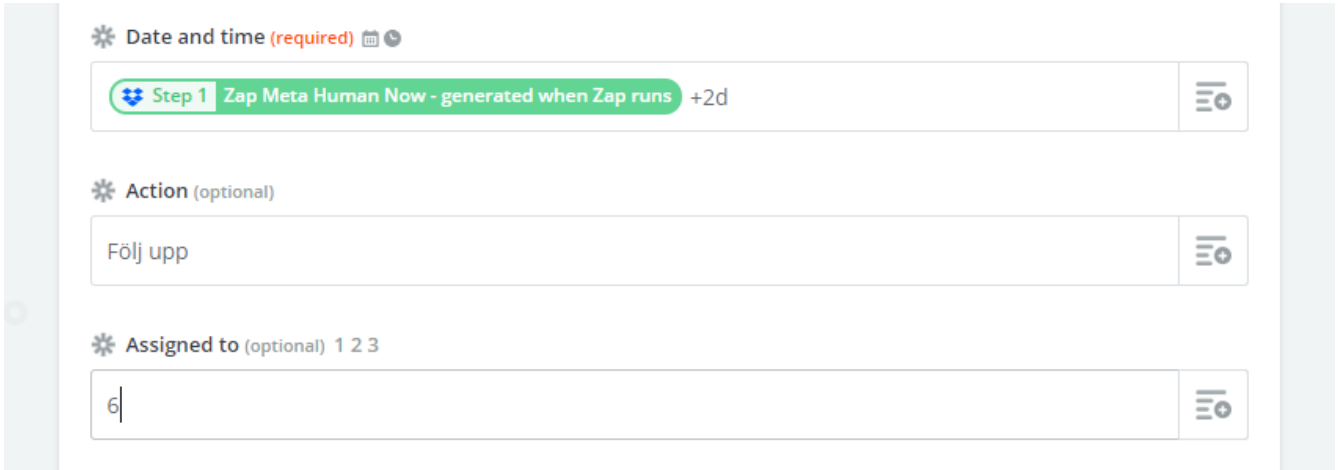
Then enter the date that the Activity should have in webCRM. If it's the same date as the order is submitted add this text string to the date field: `{{zap_meta_human_now}}`.

If you want the Activity date to be order date + x number of days, then type `{{zap_meta_human_now}}` space + number of days. For example: `{{zap_meta_human_now}} + 2d`.

Then you type what Action the Activity should have in webCRM. It must be written in exactly the same way as it is written in webCRM, event to the point of upper and lower case letters.

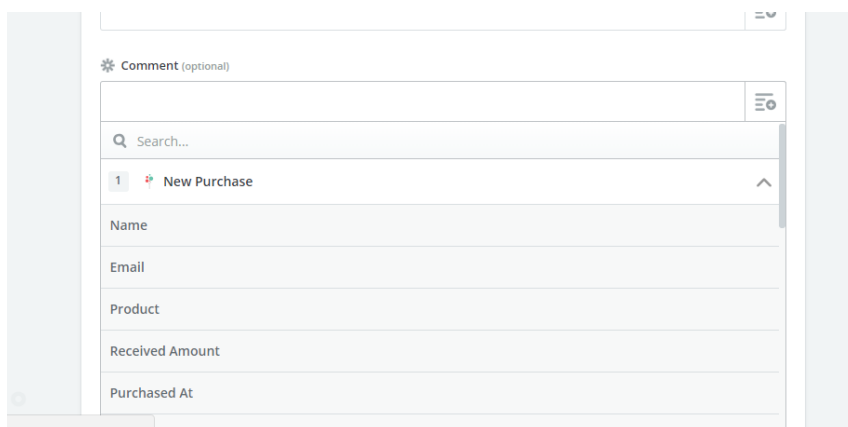
Then you decide who should be responsible for the Activity by typing the user's system ID in this field in the template in Zapier.

You can find the user's system id in webCRM if you go to System Configuration -> User and click the "pencil" to the left of the user. Down to the right in the black bottom field, just to the right of an "R" the user's system id can be found. See pictures:



You can also choose if you want to give the Activity an additional shorter description of max. 50 characters in "Description", and if you want to provide some more information about the Activity in "Comment".

In Comment, it may be useful to enter information from Simplero by selecting "merge fields" from Simplero. See picture:



When you are done, just click "Continue" down to the right. In the next step, you can optionally send a test to webCRM to see how your Zap works (this is recommended). Then click "Finish" and then choose whether your Zap should be turned on and be active.