

5 Minute Guide to Zapier Data Connection to Commissionly

Zapier is a data connection service that allows you to move data between over 500 platforms including Commissionly.

Zapier allows data to be sent to Commissionly when there is a trigger event in your data source – eg A new invoice created or a payment received.

Tasks – A task is an event that occurs on data. Anything that involves moving data or the transformation of data is a task.

Triggers – An event in the source platform that you have chosen as the trigger for data to be sent to Zapier .

Actions – An action that is performed on the data once it is in Zapier. Each action is a single task.

Zap – A zap is a collection of tasks that result in the data being imported from the source platforms, transformed and exported to Commissionly.

Advantages of using Zapier include:

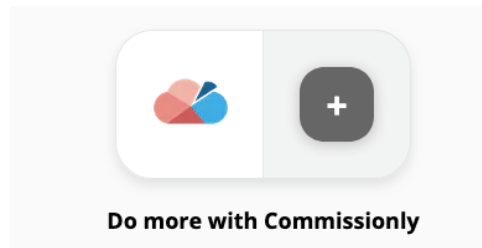
- Zapier handles authentication for all the applications and keeps them connected.
- Data is automatically imported.
- Multiple data sources can be combined into a single data file for import into Commissionly.
- Commissionly Opportunities can be updated from different data sources.
- Data can be manipulated or transformed before being imported – Including filtering, calculations and formatting.

Pre Requisites

1. Zapier Account – You will need a Zapier account. Zapier charges by tasks. A task is an event that works on.
2. Data Source – You will need at least 1 data source and any required authorisation requirements , which may include– Login and Password, API access and Keys.




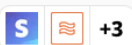
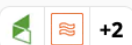
Setting up your Zapier Connection and Zaps

Log into Zapier and search for Commissionly.



Predefined Zaps

There are a number of pre defined Zaps for Commissionly for popular programs. These include: Quickbooks, Xero, Stripe, Excel, Google Sheets, Pipedrive, Hubspot, Insightly, Infusionsoft, Zoho Books.

	Create or update Commissionly opportunities for new updated Pipedrive deal stages Pipedrive + Formatter by Zapier + Commissionly	TRY IT
	Create or update Commissionly opportunities for new payments on Zoho invoices Zoho Books + Commissionly	TRY IT
	Create Commissionly opportunities for new paid Xero invoices Xero + Commissionly	TRY IT
	Create Commissionly opportunities and new companies/accounts for new charges in Stripe Stripe + Formatter by Zapier + Commissionly	TRY IT
	Create or update Commissionly opportunities for new payments in Infusionsoft by Keap Infusionsoft by Keap + Formatter by Zapier + Commissionly	TRY IT

The preconfigured zaps will give you the basic steps to quickly connect to Commissionly.

Build your own Zap – Using Excel as an example.

Log into your Zapier account and select Make A Zap

MAKE A ZAP

Name Your App

<  / **Name your zap**

Search for the app containing your source data – eg Excel (Requires OneDrive), Pipedrive etc

Choose App & Event

Excel





Microsoft Excel

Select the trigger event – these are defined by the app creator (If the event you require is not available you may be able to build the connector in Zapier Developer)

Choose App & Event

 Microsoft Excel [Change](#)

 **New Row**
Triggers when a new row is added to a worksheet in a spreadsheet.

 **Updated Row**
Triggers when a row is added or updated in a worksheet.



 **New Worksheet**
Triggers when a new worksheet is added to a spreadsheet.

 **New Row in Table**
Triggers when a new row is added to a table in a spreadsheet.

In our case we will use Updated Row as the trigger. Zapier will listen for this event in your Excel sheet and transfer data when it detects an updated row.

Select continue

Choose App & Event


 Microsoft Excel	Change
 Updated Row Triggers when a row is added or updated in a worksheet.	Change

[CONTINUE](#)

Select Add New Account from the drop-down list

Choose Account

Microsoft Excel account: (required) [Edit Accounts](#)

 Search & Select ...

[+ Add a New Account](#)


Follow the instructions for the app that you are connecting to

Once you have connected to you app you will be presented with the options for the connection set by the apps developer

Excel Example


Customize Row

Storage Source


 OneDrive ⌵

NOTE that this defaults to OneDrive. If Sharepoint is picked, subsequent folders that would be listed are ONLY folders in the default Sharepoint site. Other custom Sharepoint sites are currently not supported.


Folder (required)

 / ⌵

Spreadsheet (required)

 Choose value... ⌵

Worksheet (required)

 Choose value... ⌵

Trigger Column

any_column ⌵

Trigger on changes to cells in this column only.

Select the required options for the data source and select continue

Customize Row

Storage Source
OneDrive

NOTE that this defaults to OneDrive. If Sharepoint is picked, subsequent folders that would be listed are ONLY folders in the default Sharepoint site. Other custom Sharepoint sites are currently not supported.

Folder (required)
/

Spreadsheet (required)
Source Data File.xlsx

Worksheet (required)
Source Data File

Trigger Column
any_column

Trigger on changes to cells in this column only.

Refresh Fields

CONTINUE

Next we need to add Commissionly to the zap to receive the data from your source app

2. Do this ...

EDIT

Search for Commissionly

Commissionly

Commissionly

Select the data module in Commissionly that you want to push data into. In most cases this will be Opportunities.

Choose App & Event

Commissionly

Change

Create/Update Opportunity
Used to create or update an opportunity in Commissionly. Remote Module and Remote ID fields must be in use for UPDATE to work and Remote Module should be Opportunities.

Create/Update Product
Used to create or update a product in Commissionly. Remote Module and Remote ID fields must be in use for UPDATE to work and Remote Module should be Products.

Create/Update Company/Account
Used to create or update a company or account in Commissionly. Remote Module and Remote ID fields must be in use for UPDATE to work and Remote Module should be Companies.

Create/Update Person/Contact
Used to create or update a person or contact in Commissionly. Remote Module and Remote ID fields must be in use for UPDATE to work and Remote Module should be People.

Select continue and then add your Commissionly account by selecting Add New Account at the bottom of the account list

+ Add a New Account

Sign in with your Commissionly account logon and password.

Select continue and map your data fields to the Commissionly fields.

Customize Opportunity

Parent (required)

Type or insert...

The Parent must be a Company/Account or Person/Contact to which the Opportunity/Deal belongs. If you don't attach Parent to your opportunities in your current CRM/ERP, then please add a dummy value to ensure that this field is populated.

Opportunity Name (required)

Type or insert...

The opportunity name is a unique identifier to help you link opportunities or deals between your CRM/ERP system and our system. We recommend you use your CRM/ERP opportunity ID to link to this field.

Owner

Type or insert...

The owner is the person who will be the recipient of the commission.

Status

Type or insert...

The current status of the opportunity. An opportunity needs to be in status Won for it to be a commissionable event and the status needs to exist in Commissionly for it to be recognised by the system.

Won Date

Type or insert...

The date on which the opportunity closed. The date format should be yyyy-mm-dd.

Opportunity Value 1.0

Type or insert...

Required Fields

Parent – This is the entry that will be the top relationship – eg in a Sale this would be the customer name

Opportunity Name – This is a unique number that is used to create and update the data in the opportunity.

For calculating commissions we require 3 additional fields

Status – The label that will trigger the payment of a commission

Status Date – The date (in the format YYYY – MM –DD) that will be in the commission payment period. You can add a Zapier Formatting task if you need to convert the date format.

Deal Value – This is the amount that will be used to calculate the commission.

Adding Custom Fields

If you want to add additional information into the opportunity you can create custom fields.

You can add additional information by creating Custom Fields in Commissionly on the in the Opportunity settings (Commissionly> Settings>Opportunities>Add Field

Once you have set up the custom fields return to Zapier and in the Commissionly Step – Select Refresh Fields at the bottom of the field mapping section.