commissionly.io

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.

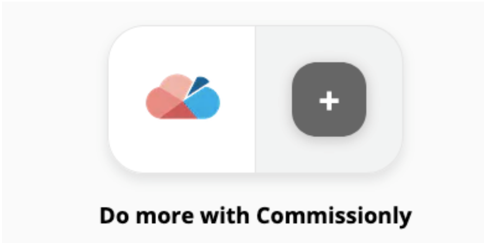
Pre Requisites

1. Zapier Account – You will need a Zapier account. Zapier charges by tasks. A task is an event that works on.

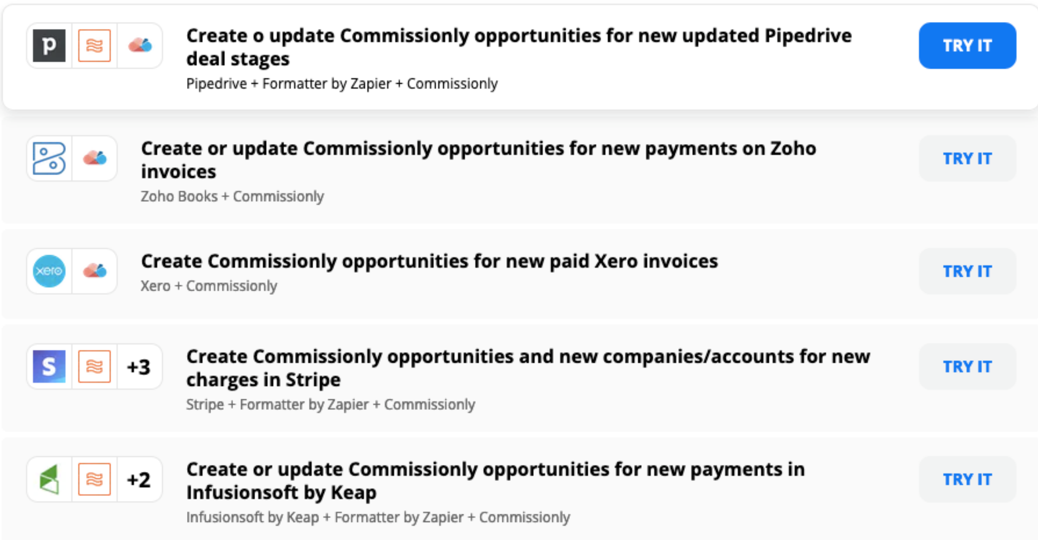
2. Data Source -You will need at least 1 data source and any required authorisation requirements , which may include- Login and Password, API access and Keys.

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.

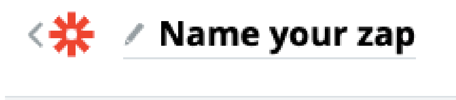


The preconfigured zaps will give you the basic steps to quickly connect to Commissionly.

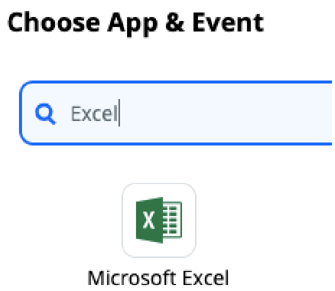
Build your own Zap - Using Excel as an example.

Log into your Zapier account and select Make A Zap

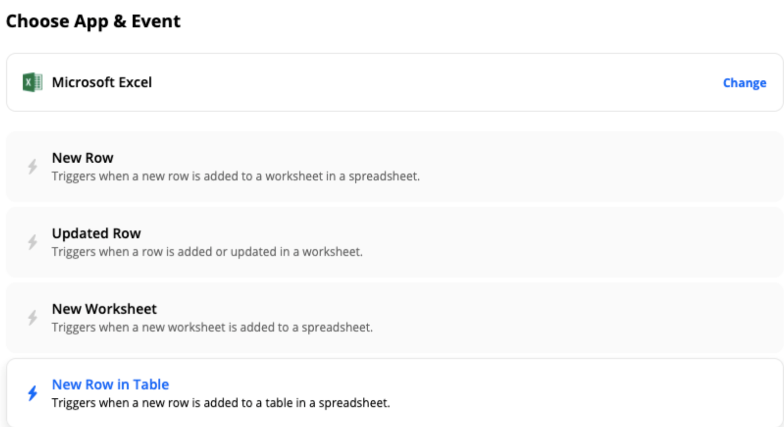
Name Your App



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

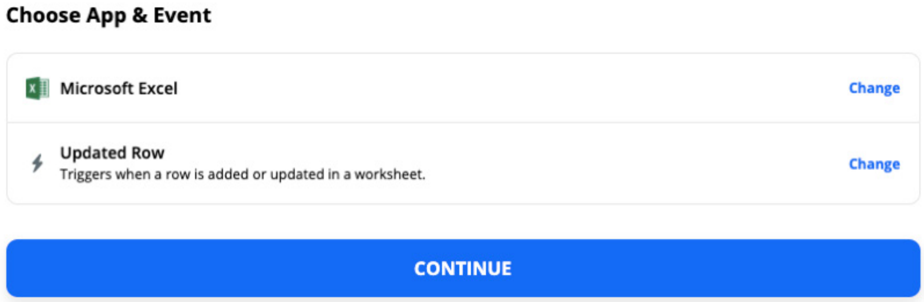


Select the trigger event – these are defined by the app creator (If the event you require is not available you may be able to build the connector in Zapier Developer)

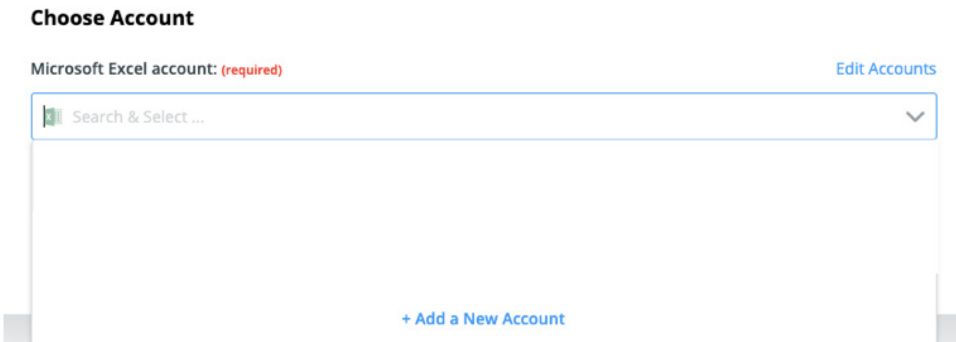


In our case we will use Updated Row as the trigger. Zapier will listen for this event in your Excel sheet and transfer data when it detects an updated row.

Select continue



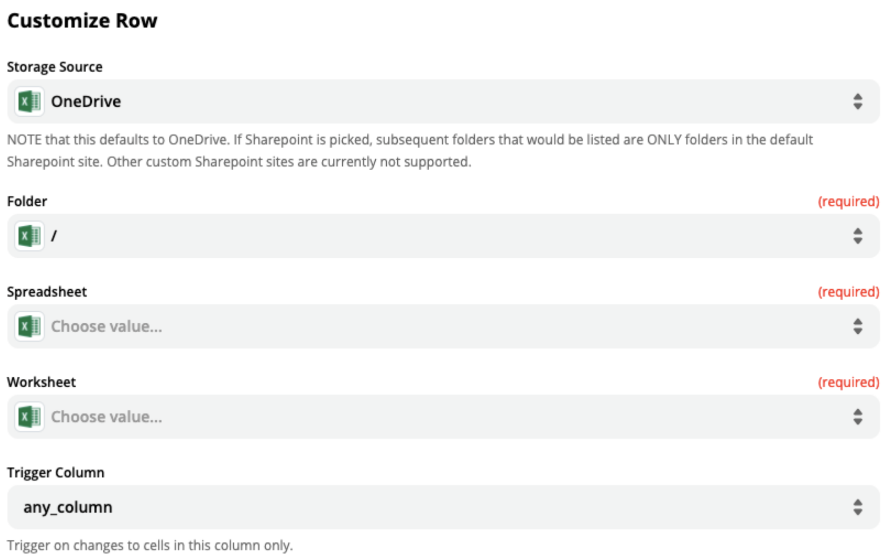
Select Add New Account from the drop-down list



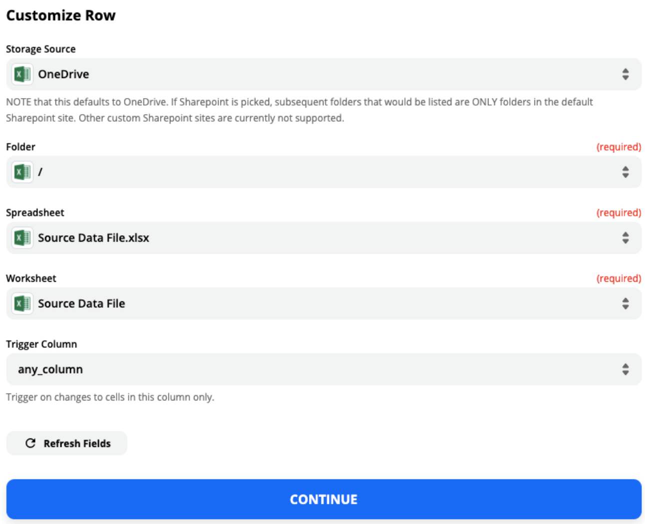
Follow the instructions for the app that you are connecting to

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

Excel Example

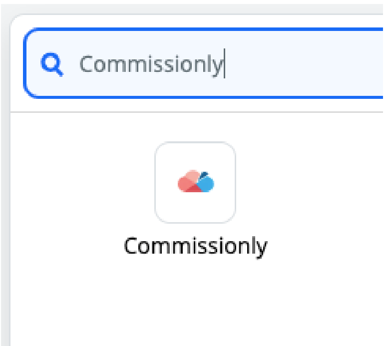


Select the required options for the data source and select continue

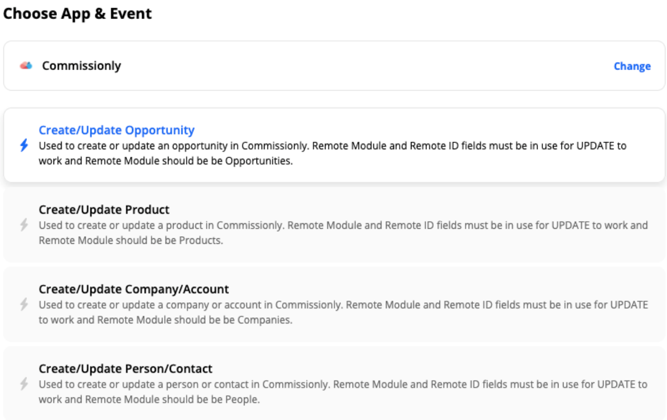


Next we need to add Commissionly to the zap to receive the data from your source app

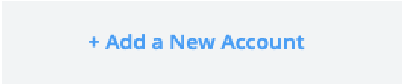
Search for Commissionly



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

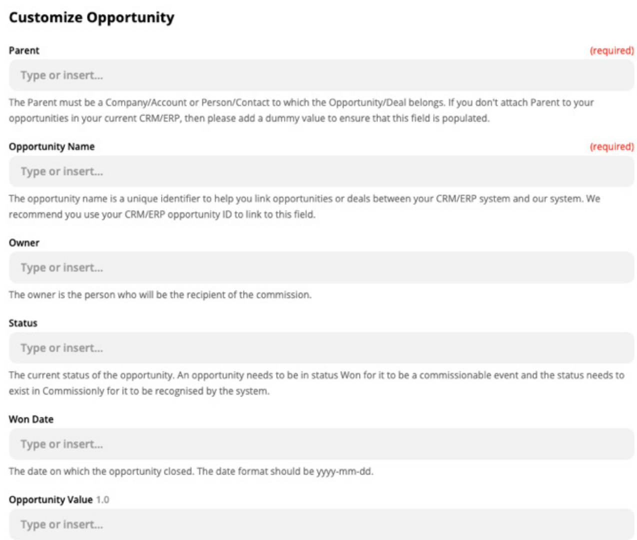


Select continue and then add your Commissionly account by selecting Add New Account at the bottom of the account list



Sign in with your Commissionly account logon and password.

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



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

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

You can add addition 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 filed mapping section.