

Zapier Integration

Objectives

- Integrate LEXZUR with other Web applications

Steps

Zapier is a product that allows end-users to integrate the web applications you use and automate workflows.

It helps you automate repetitive tasks between two or more apps. When an event happens in one app, Zapier can tell another app to perform a particular action.

One trigger available now is to create an invoice in LEXZUR and another action is to create a payment in LEXZUR.

Let's assume that a user is using both QuickBooks as an accounting solution and LEXZUR as a legal practice management solution.

In this scenario, we will assume that the user wants to connect both systems to create an invoice and record payments.

To do so the user should have QuickBooks, LEXZUR, and Zapier licenses to use this feature.

After login into Zapier, you should select the apps that you want to connect to start your custom setup.

To connect LEXZUR with QuickBooks online, select the "connect this app" and "with this one" fields, as well as the trigger and action fields.

As an example here, the trigger is the "New invoice" and the action is "Create Invoice".

The user should click on " Try it" and he will be redirected to a page explaining what is coming next to get started.

In order to allow Zapier access to your LEXZUR account, you can either select an existing account or click on "Connect a new account". You will be redirected to a page where you should enter the site and your LEXZUR's instance number to allow Zapier to access your LEXZUR account.




App4Legal → QuickBooks Online

- +** Connect App4Legal
- +** Connect QuickBooks Online
- ✎** Customize Zap
- 🔄** Test Zap
- 🔌** Turn on Zap

Connect your App4Legal account

QuickBooks Online is a premium app and not available on your current account.
[Upgrade now](#) or [start a free 7-day trial](#) of our Professional Plan.

 Zapiier uses **bank-level security** to protect your credentials. [Read about Zapiier's dedication to data privacy.](#)

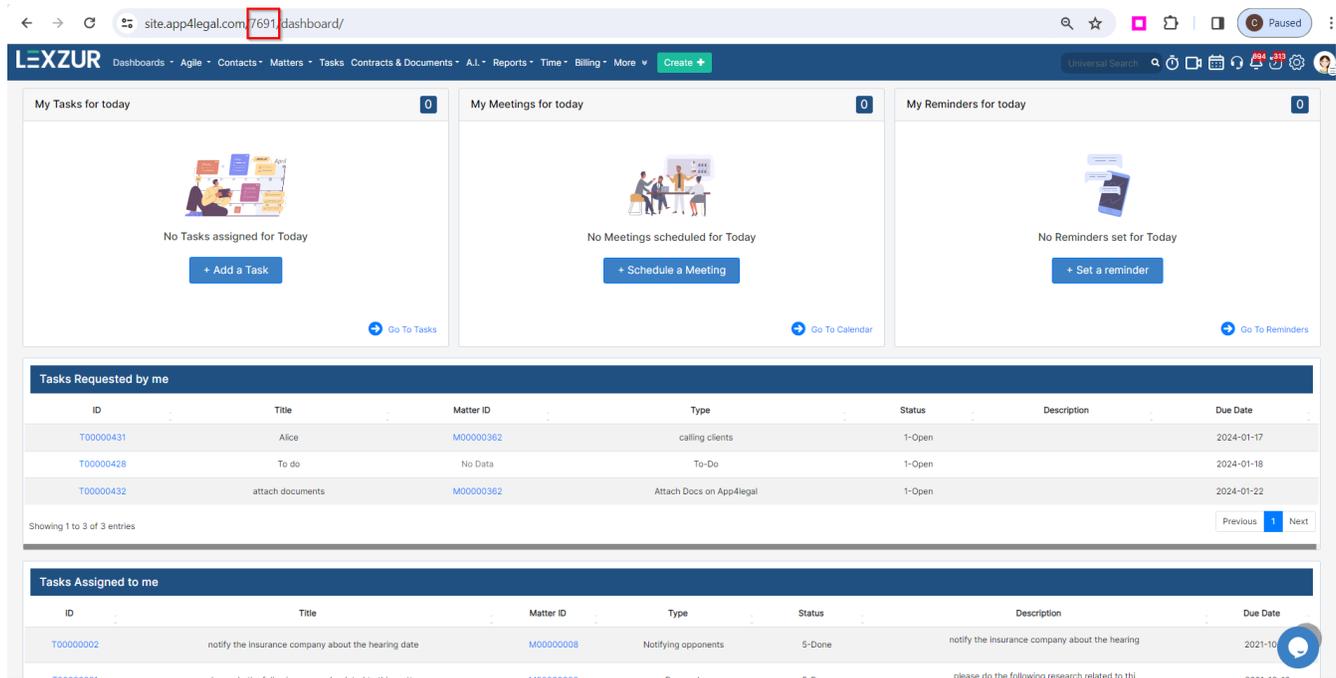
 **App4Legal 9301 #4** ✔

 **App4Legal 9301 #3**
⚠ Please reconnect your account Reconnect

 **App4Legal 9301 #2**
⚠ Please reconnect your account Reconnect

[Connect a new account](#)

Note: You can find your instance number in the Address Bar (from your LEXZUR Website)



site.app4legal.com/7691/dashboard/

LEXZUR Dashboards - Agile - Contacts - Matters - Tasks - Contracts & Documents - A.I. - Reports - Time - Billing - More - Create +

My Tasks for today 0

No Tasks assigned for Today

[+ Add a Task](#)

[Go To Tasks](#)

My Meetings for today 0

No Meetings scheduled for Today

[+ Schedule a Meeting](#)

[Go To Calendar](#)

My Reminders for today 0

No Reminders set for Today

[+ Set a reminder](#)

[Go To Reminders](#)

Tasks Requested by me

ID	Title	Matter ID	Type	Status	Description	Due Date
T00000431	Alice	M00000362	calling clients	1-Open		2024-01-17
T00000428	To do	No Data	To-Do	1-Open		2024-01-18
T00000432	attach documents	M00000362	Attach Docs on App4legal	1-Open		2024-01-22

Showing 1 to 3 of 3 entries

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Tasks Assigned to me

ID	Title	Matter ID	Type	Status	Description	Due Date
T00000002	notify the insurance company about the hearing date	M00000008	Notifying opponents	5-Done	notify the insurance company about the hearing	2021-10-10

Insert your instance number as shown in the figure below.

Connect an Account | Zapier - Google Chrome

zapier.com/engine/auth/start/AppFourLegalCLIAPI@1.0.0/?_zapier_auth_id=33445641&_zapier_account_id=12584113

Allow Zapier to access your App4Legal Account?

Data Center (required)
Specify which data center you want to access. Example:
<https://site.app4legal.com/>

https:// Site .app4legal.com/

Site (required)
Indicate which instance you want to access. Example:
<https://site.app4legal.com/2010>

https://site.app4legal.com/

Insert your instance number here

Click on Yes, Continue, and you will be redirected to log in with your credentials and select the invoice status if it is open or draft, then click next.

Sign In to App4Legal - Google Chrome
dev-site.app4legal.com/2010/api/login



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zapier Need help? [Contact Support](#) 

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-  Connect QuickBooks Online
-  Customize Zap
-  Test Zap
-  Turn on Zap

Status

 draft

 open

Filter by invoice status.

Select the organization name then click on Next.



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Organization

GCC instance

[Load more](#)

Filter by organization.

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Next

The next step is to connect your QuickBooks Online account and select the customer.



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Connect your QuickBooks Online account

QuickBooks Online

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Next

From the list, select the fields you wish to edit in QuickBooks online and click on Next.



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Select the fields you want to edit in QuickBooks Online

Select All

Email

Cc

Bcc

Send Later?

Billing Address

After choosing the fields, It is now time to match them with LEXZUR fields. Once we match the fields, the user needs to test the Zap (integration)



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Map fields from App4Legal into QuickBooks Online

Invoice Date

Invoice Date

Defaults to today's date if not specified.

Invoice Number

Invoice Number

If empty, no Invoice number is added. Max of 21 characters or put AUTO_GENERATE to let... [more](#)

Description

Description

Amount 1.0 (required)

amoun **Total**

Should not include tax.

Need to add a step or filter data? [See how the Zap editor can help you.](#)

Once the fields are matched, this means that the Zap is working, and now LEXZUR and QuickBooks are now integrated.



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Let's test out this Zap

We will create an item in QuickBooks Online to verify all works.

Customer	Back Line Company
Invoice Date	2022-06-24
Invoice Number	DRFT0000003
Description	No sample data found
Amount	amoun230.00

In this example, the Zap that has been created will allow adding an invoice in QuickBooks once it is created in LEXZUR.

Note: It is now possible to integrate over 5000 apps with LEXZUR, including QuickBooks, Zoho Books, Xero, FreshBooks, and Slack.

For more information about LEXZUR, kindly reach out to us at help@lexzur.com.

Thank you!