

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.

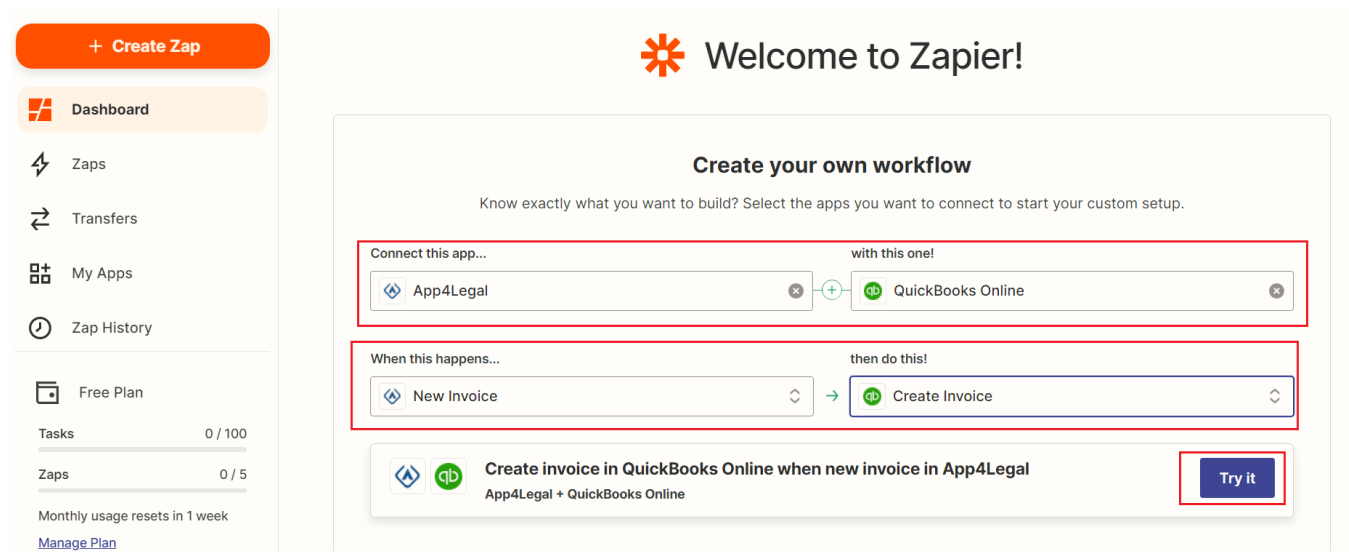
In this scenario, we will assume that the user wants to connect both systems to create an invoice and record payments.

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

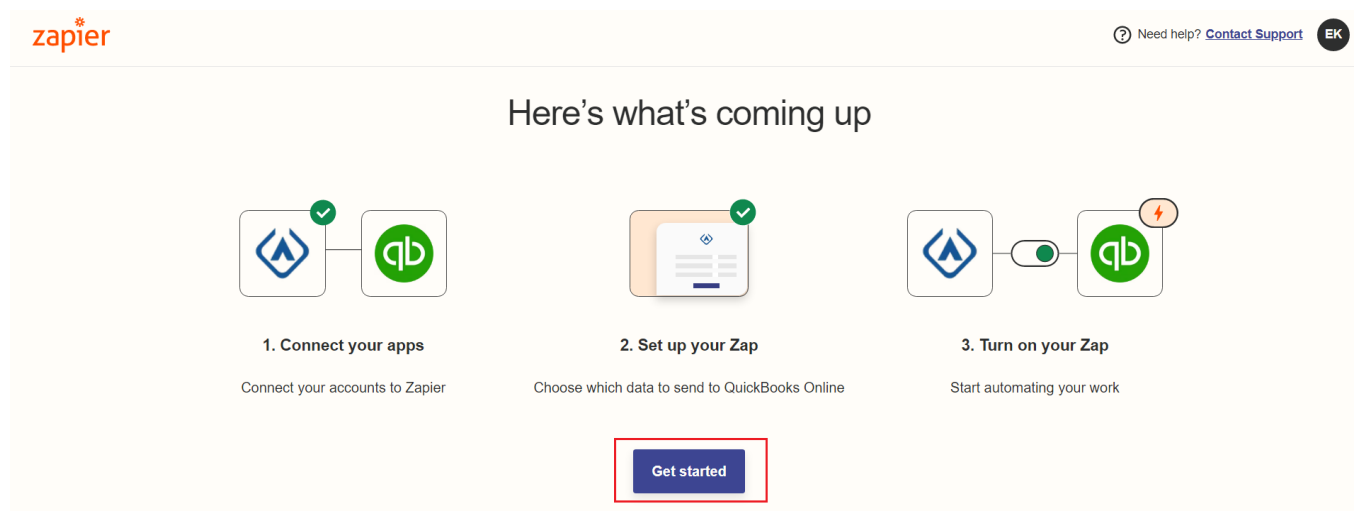
After login into Zapier, you should select the apps that you want to connect to start your custom setup.

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.




Zapier uses **bank-level security** to protect your credentials. [Read about Zapier'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](#)

Universal Search



My Tasks for today0




No Tasks assigned for Today

[+ Add a Task](#)

[Go To Tasks](#)

My Meetings for today0




No Meetings scheduled for Today

[+ Schedule a Meeting](#)

[Go To Calendar](#)

My Reminders for today0



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

[Previous](#) [1](#) [Next](#)

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

Showing 1 to 1 of 1 entries

[Previous](#) [1](#) [Next](#)

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:// .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





Sign In

All Rights Reserved © 2022 - App4Legal


zapier


Need help? [Contact Support](#) EK


App4Legal → QuickBooks Online

- Connect App4Legal
- Connect QuickBooks Online
- Customize Zap
- Test Zap
- Turn on Zap

Status

☐  draft


☐  open


Filter by invoice status.



Back

Next


Select the organization name then click on Next.





Need help? [Contact Support](#) 





App4Legal → QuickBooks Online

 **Connect App4Legal**

 Connect QuickBooks Online


 Customize Zap

 Test Zap

 Turn on Zap

Organization

☐

 GCC instance


[Load more](#)


Filter by organization.



Back

Next


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





Need help? [Contact Support](#) 





App4Legal → QuickBooks Online

 Connect App4Legal


 **Connect QuickBooks Online**


 Customize Zap

 Test Zap


 Turn on Zap

Connect your QuickBooks Online account

 QuickBooks Online





[Connect a new account](#)

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


Back


Next


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





App4Legal → QuickBooks Online

 Connect App4Legal

 Connect QuickBooks Online

 **Customize Zap**

 Test Zap

 Turn on Zap

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)



App4Legal → QuickBooks Online

Connect App4Legal

Connect QuickBooks Online

Customize Zap

Test Zap

Turn on Zap

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)

amounTotal

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.



App4Legal → QuickBooks Online

Connect App4Legal

Connect QuickBooks Online

Customize Zap

Test Zap

Turn on Zap

Let's test out this Zap

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

qb Customer	Back Line Company
qb Invoice Date	2022-06-24
qb Invoice Number	DRFT0000003
qb Description	No sample data found
qb 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!