Setting Up A Webhook in Zapier to trigger an new or updated record in Commissionly

Webhooks send messages when an event such as a new or updated records data needs to be moved between software platforms. In this example we are connecting Monday and Commissionly via Zapier

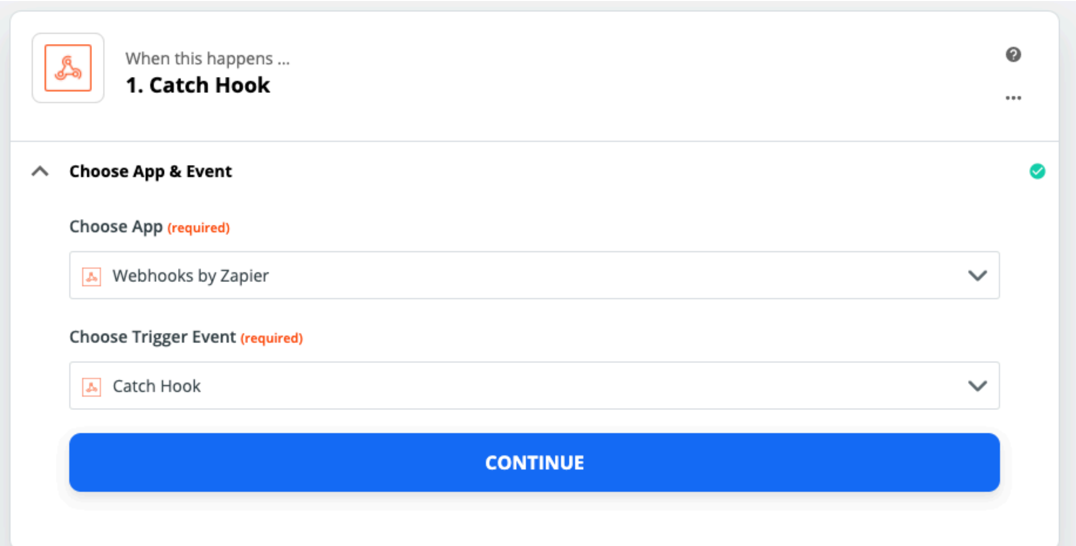
In this walk through we use Monday.com as the source but the principle is the same for most software that offer Webhooks.

Before setting the webhook,
In Zapier – You will need a premium account

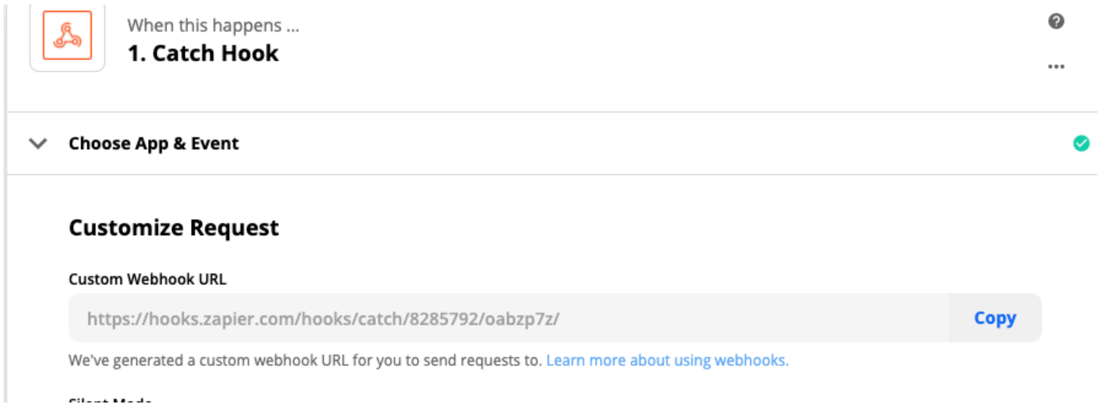
In Monday, set up the column and value that you are going to use as the trigger for the webhook to notify Zapier that new data needs to be pulled from Monday.

In Commissionly - you will need a Commissionly account and to set up any custom fields that are needed for your data. (You can access the Commissionly Knowledge Base here https://support.commissionly.io/portal/en/kb/commissionly-app-support)

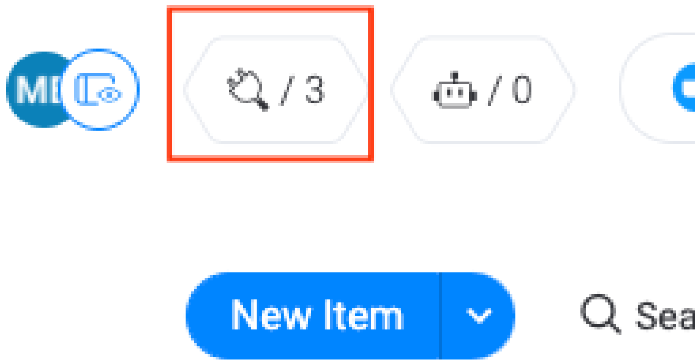
In Zapier add the Webhook By Zaper app and set it to catch a webhook then press continue



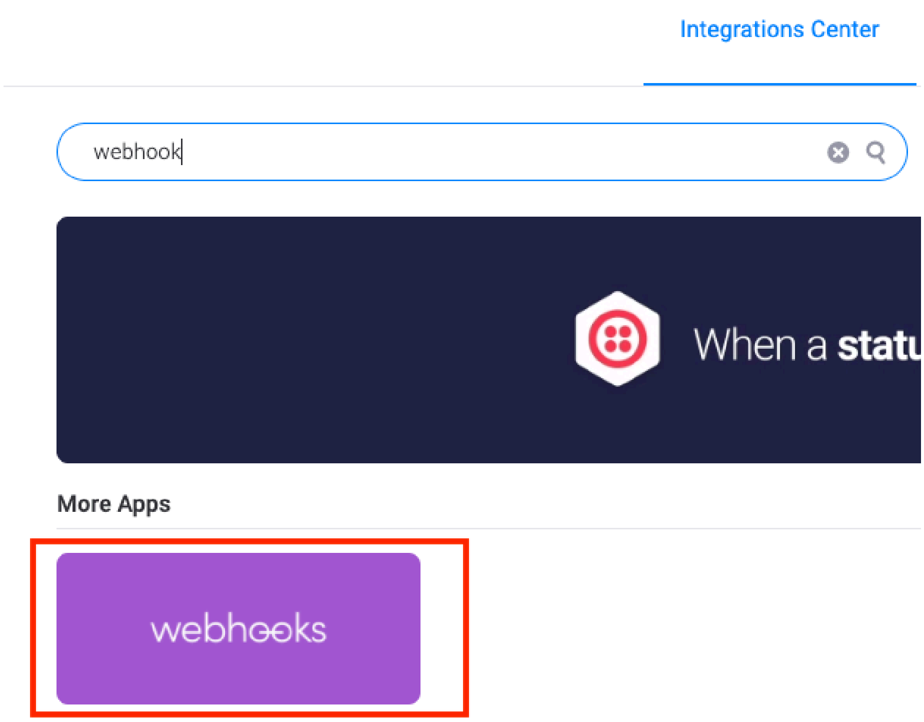
Copy the Webhook URL ready for use in the Monday Webhook Set up



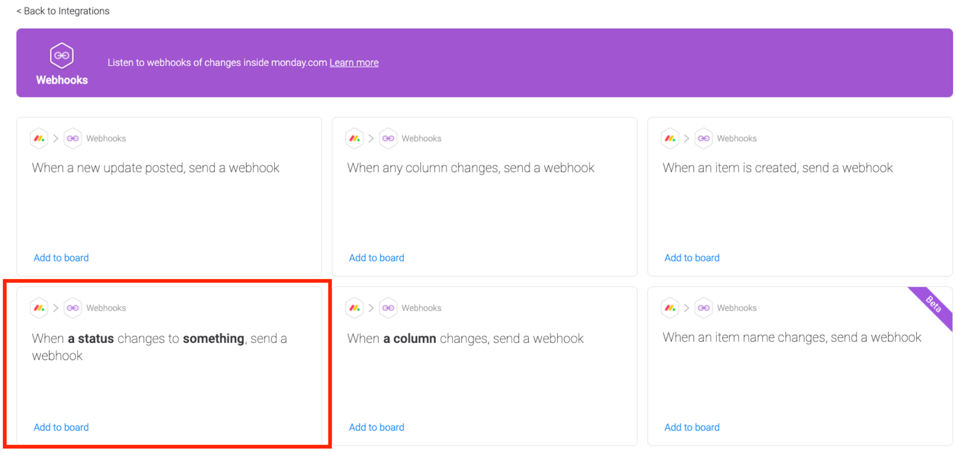
In Monday, on the board that you wish to create a webhook for – Select the integration button



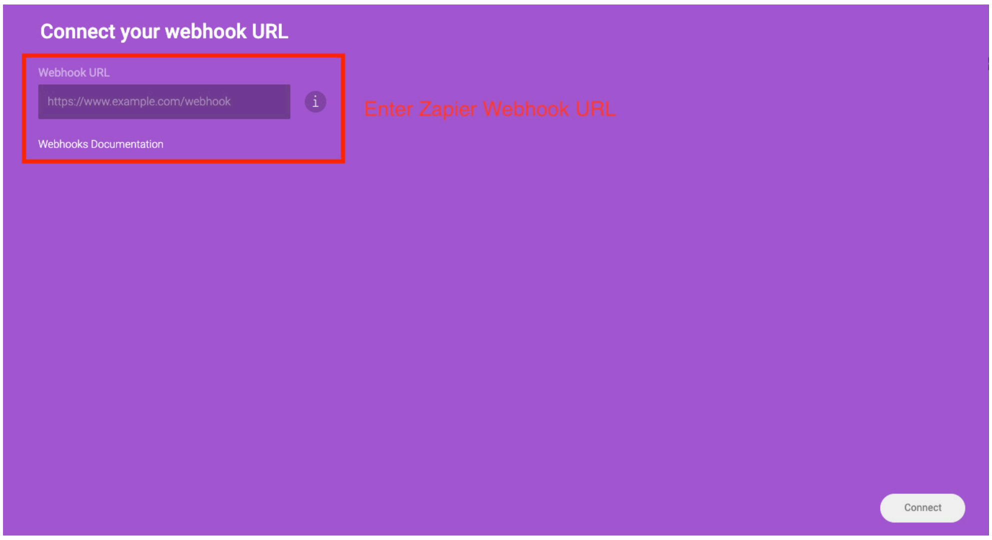
In the integration apps screen search for Webhook and select the app



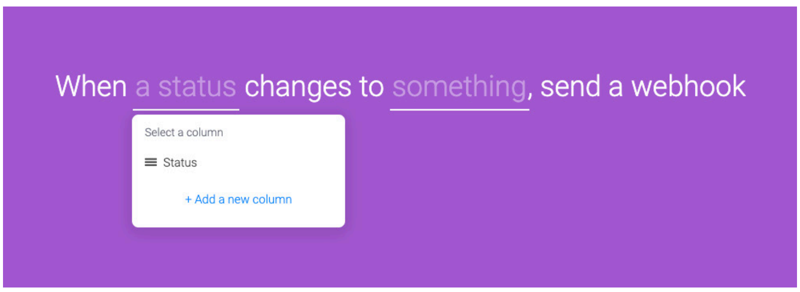
Select the webhook:
When a status changes to something send a webhook

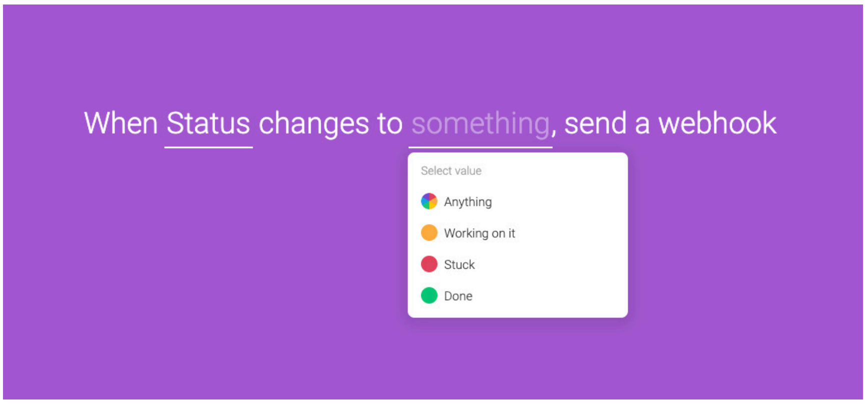


On the Choose Account page, choose a new account and enter the webhook URL value that you have from Zapier (This is shown when you include Webhook by Zapier in your Zap)

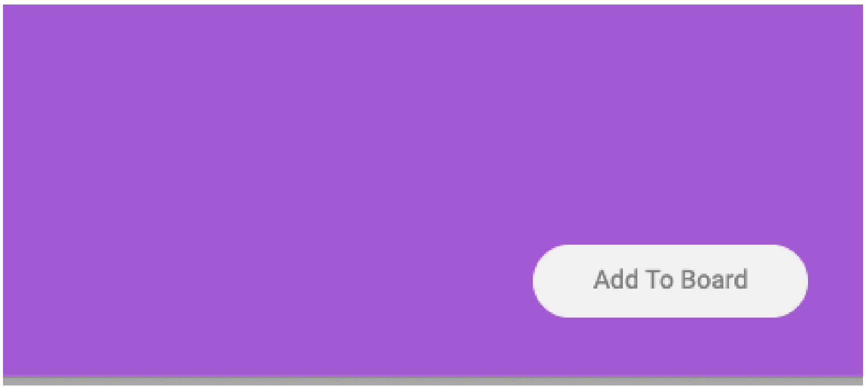


In the sentence – Select the column and the value that you want to trigger the webhook to be fired





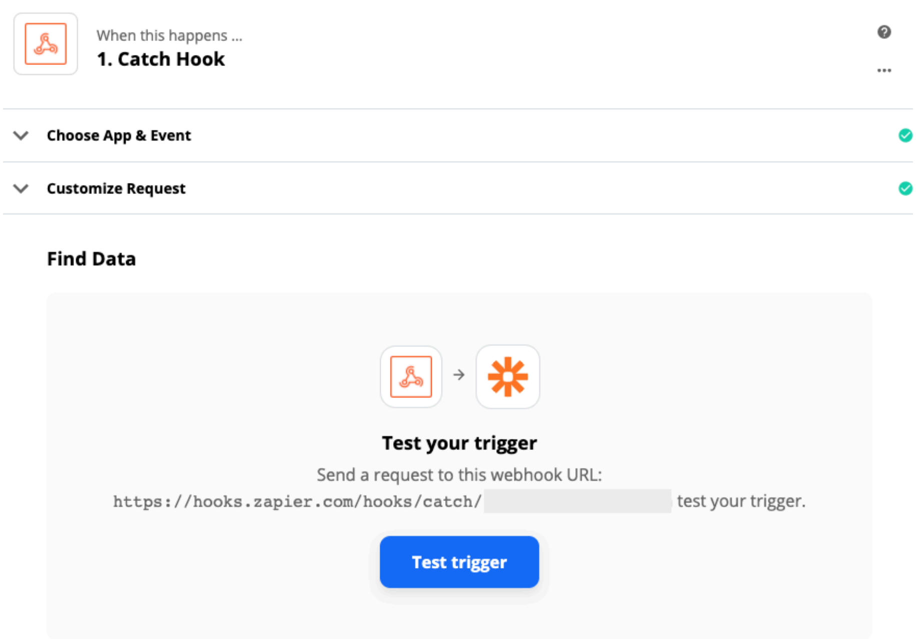
Select Add To Board in the bottom right to install the webhook.



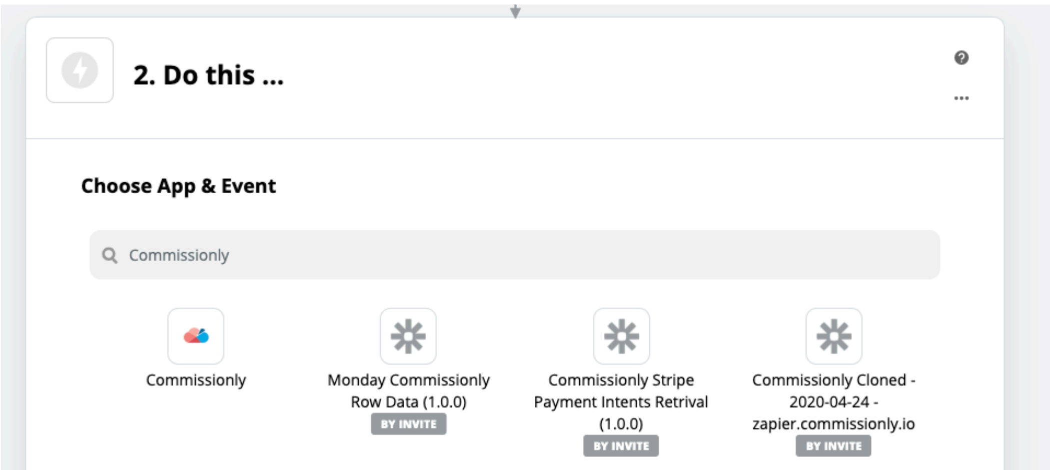
Testing
Before you can test the webhook you will need to set an items column in your board to match the value you have set as a trigger ie If you selected Status / Done then you need to update a Status to done before testing.

In Zapier go to you webhook in your zap and select Test Trigger.

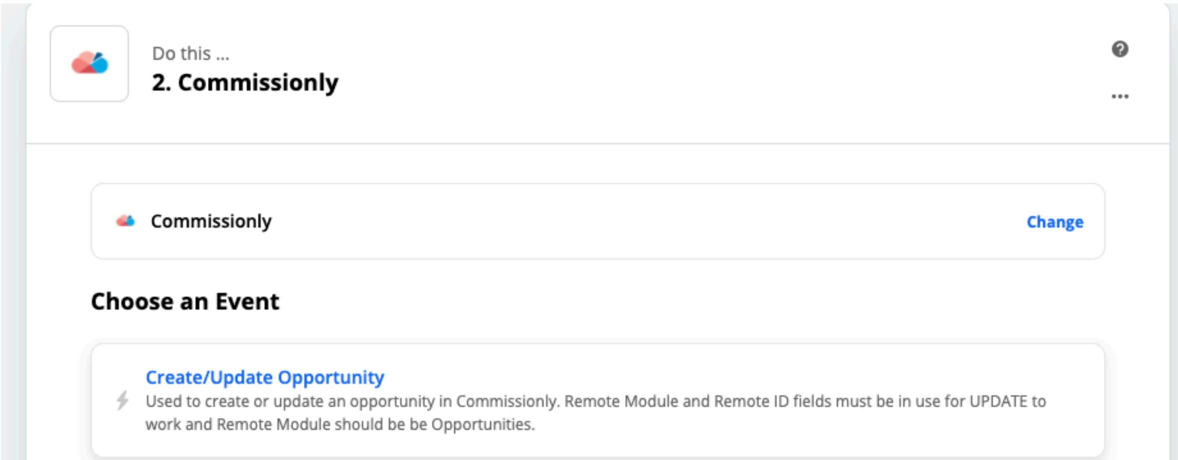
If the webhook has been set up correctly and a Monday item set to the values for the trigger then you will see test data



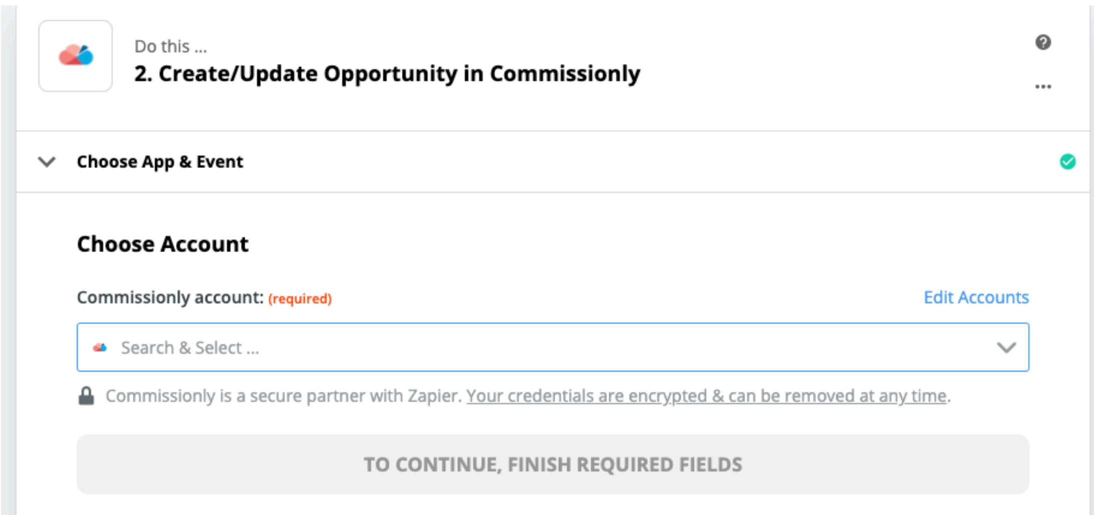
To connect your webhook to Commissionly select Do this box and select the Commissionly App



Select Create/Update opportunity



Add or Enter your Commissionly Account details



Map the data fields from Monday to the Opportunity Fields in Commissionly

Required Fields
Parent – The entity that owns the record – eg in a sale this would be the company being sold to.

Opportunity Name – This is a unique id that is used when updating a record. For Monday use the Pulse ID field

Once you have mapped the fields select continue and then test the connection.

Log into your Commissionly App
If the fields have be mapped correctly you will see the new record in Commissionly in you Opportunities List