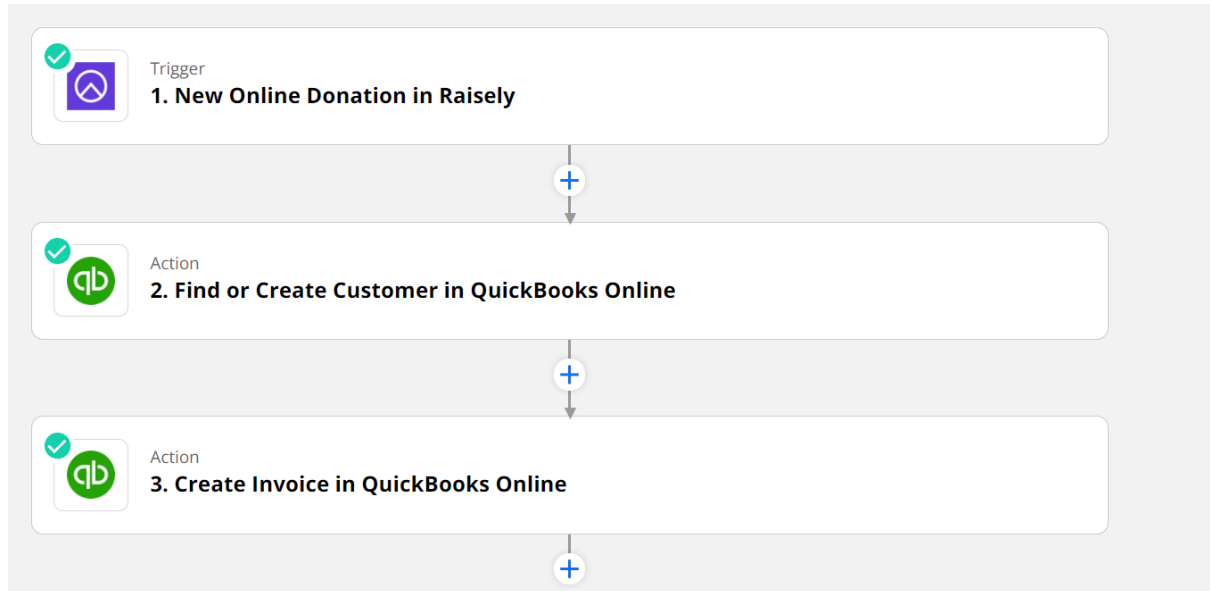


# Raisely to Quickbooks Integration

When a donation is created in Raisely then an Invoice should be created in Quickbooks along with Customer details.

## Zapier Steps



## Step 1 – New Online Donation as a Trigger

< ✨ Raisely to Quickbooks

Trigger

1. New Online Donation in Raisely

Choose app & event

Raisely [Change](#)

Trigger Event (required)

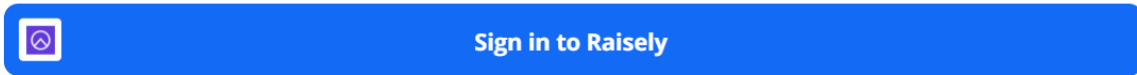
New Online Donation [INSTANT](#)

This is what starts the Zap.

[Continue](#)

Click Continue

## Choose account



🔒 Raisely is a secure partner with Zapier. [Your credentials are encrypted & can be removed at any time.](#)

To continue, finish required fields

Sign into your Raisely account and it will ask you to give the API Webhook ID to proceed further.

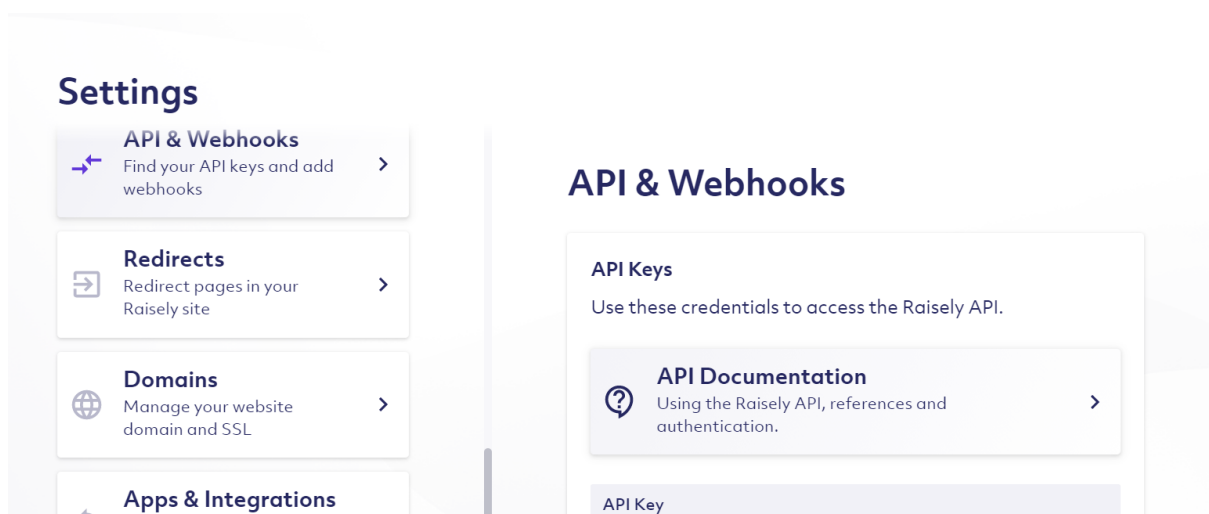
## Allow Zapier to access your Raisely Account?

**API Key** (required)

In your [Raisely Admin Panel](#), select your campaign and then find your API key under Settings > API & Webhooks. Your key will start with 'raisely-sk-'

Yes, ContinueCancel

Go to Raisely -> Settings -> API & Webhooks and copy Webhooks which is starting with 'raisely-sk-'



## Choose account

Raisely account: (required)

[Manage connected accounts](#)



Raisely Prison Network



Raisely is a secure partner with Zapier. [Your credentials are encrypted & can be removed at any time.](#)

Continue

And then Continue

## Set up trigger

Campaign

(required)



Prison Network

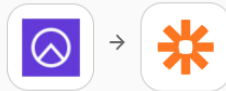


Refresh fields

Continue

Choose Campaign

## Test trigger



### Test your trigger

We'll find a recent donation in your Raisely account Raisely Prison Network to confirm that the right account is connected and your trigger is set up correctly.

Test trigger

Select recent donations from test and choose test trigger.

**Step 2 – Find or Create Customer in Quickbooks Online**



Action

## 2. Find or Create Customer in QuickBooks Online

? ...

### Choose app & event



QuickBooks Online

PREMIUM

[Change](#)

Action Event

(required)

Find Customer

This is performed when the Zap runs.

Continue

### Choose account

#### Choose account

QuickBooks Online account: (required)

[Manage connected accounts](#)



QuickBooks Online #2

QuickBooks Online is a secure partner with Zapier. [Your credentials are encrypted & can be removed at any time.](#)

#### Set up action

Search Field

(required)



Email

Search Value

(required)

1. Email: tanya.cannington@bigpond.com

Depending on which "Search Field" you selected, the search value must exactly match the "Display name as" field or "Email" field in Quickbooks.

Full Name

(required)

1. First Name: Tanya Cannington

### Note:

Select **“Create QuickBooks Online Customer if it doesn’t exist yet?”** to create a customer if its not already in Quickbooks.

It avoids duplication when we choose **“Email”** as a search field in set up action.

Search customer data...

**Taxable:** false

**Job:** false

**BillWithParent:** false

**Balance:** 0

**BalanceWithJobs:** 0

**CurrencyRef:**

**value:** AUD

**name:** Australian Dollar

**PreferredDeliveryMethod:** None

**domain:** QBO

**sparse:** false

**Id:** 11

**SyncToken:** 0

**MetaData:**

**CreateTime:** 2021-09-26T03:27:58-07:00

**LastUpdatedTime:** 2021-09-26T03:27:58-07:00

☒ Create QuickBooks Online Customer if it doesn't exist yet?

#### Extra Fields

Heads up! We noticed some extra fields in your Zap that don't seem to be used. This could be caused by changing custom fields or temporary outages. You can clear them out if you suspect they are causing problems!

Zap Search Success On Miss

False

Remove these extra fields

**type:** ONLINE  
**method:** CREDIT\_CARD  
**currency:** AUD  
**message:** null  
**anonymous:** true  
**amount:** 2500  
**date:** 2021-09-25T05:06:09.000Z  
**updatedAt:** 2021-09-25T05:06:23.906Z  
**mode:** LIVE  
**public:**  
    **fixed\_description:**  
    **fixed\_amount:**  
**status:** OK  
**processing:** RECURRING  
**gatewayVersion:** null

Click Test and Continue

### Step 3 – Create Invoice in QuickBooks



Action

3. Create Invoice in QuickBooks Online

? ...

^ Choose app & event



QuickBooks Online

PREMIUM

[Change](#)

Action Event

(required)

Create Invoice



This is performed when the Zap runs.

Continue

Choose account

## ^ Choose account



QuickBooks Online account: (required)

[Manage connected accounts](#)



QuickBooks Online #2



🔒 QuickBooks Online is a secure partner with Zapier. [Your credentials are encrypted & can be removed at any time.](#)

## Map customer from previous step

### ^ Set up action



Customer

(required)

2. ID: 11



Invoice Number

AUTO\_GENERATE

If empty, no Invoice number is added. Max of 21 characters or put AUTO\_GENERATE to let QuickBooks increment this automatically.

### Line Items

Service Date 📅

1. Updated At: 2021-09-25T05:06:23.906Z

Product/Service



Donation



Description

Donations from Raisely

Quantity 1.0

1

Rate 1.0

Enter text or insert data...

Should not include tax.

Amount 1.0

(required)

1. Public Amount: 25

Click Continue and turn on Zap.

Ready to turn your Zap on?




OFF



Quickbooks

Customer details and donation is created as an invoice in QB

☐ Tanya Cannington 

A\$25.00

Receive payment ▼

Customer


Tanya Cannington





Email

tanya.cannington@bigpond.com

< First Previous 1-1 of 1 Next Last >

<input type="checkbox"/>	DATE ▼	TYPE	NO.	MEMO	DUE DATE	BALANCE	TOTAL	STATUS	ACTION
<input type="checkbox"/>	26/09/2021	Invoice	1009		26/10/2021	A\$25.00	A\$25.00	Open	Receive payment ▼
Total						A\$25.00	A\$25.00		

 Invoice no.1009

 Take a tour   

Customer ⓘ

Tanya Cannington ▼

Customer email ⓘ





Cc/Bcc

Separate emails with a comma

☐ Send later ⓘ

Payment Options

Connect to PayPal

☐ Accept card payments with PayPal    

BALANCE DUE

A\$25.00

Receive payment

Billing address

Tanya Cannington

Terms ⓘ

▼

Invoice date

26/09/2021

Due date

26/10/2021

Invoice no.

1009

	#	SERVICE DATE	PRODUCT/SERVICE ⓘ	DESCRIPTION	QTY	RATE	AMOUNT	
⋮	1	25/09/2021	Donation	Donations from Raisely	1		25.00	🗑
⋮	2							🗑
							Total	A\$25.00
							Balance due	A\$25.00

Add lines

Clear all lines

Add subtotal

Message on invoice