Integration Platform

Zapier

Integrate Jasmin with over 600 apps

Jasmin

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1. Introduction

Zapier is a Cloud integration platform that makes it easier to transfer data between two or more integrated applications. With Zapier, the user can specify customized integrations − Zaps − that send information from an app to another, avoiding the task of manually entering data. Zaps always consist on a ***Trigger*** and a resulting ***Action***.

2. Jasmin and Zapier

By using the Zapier platform, users can automate the integration between Jasmin and any other application or service with Zapier support to streamline their work. In practice, it becomes possible to, for example:

- Add a Mailchimp subscriber when a new client is added to Jasmin;
- Send an email to a fixed recipient through Gmail when a new client is added to Jasmin, which works like a notification.

3. Jasmin – Triggers and Actions

These are the ***Triggers*** and ***Actions*** available in Jasmin:

Triggers	***Actions***
New Sale Order	Create Sales Order
New Sales Item	Create/Update Customer
New Customer	Create/Update Sales Item
New Contact	

4. Getting Started

To start using Jasmin in Zapier, you need to:

1. Create an account in Zapier;
2. Login;
3. Select **Make a Zap**;
4. Choose **Jasmin** as the starting point for the Trigger or Action;
5. Choose the other solution you wish to use as corresponding target or source.

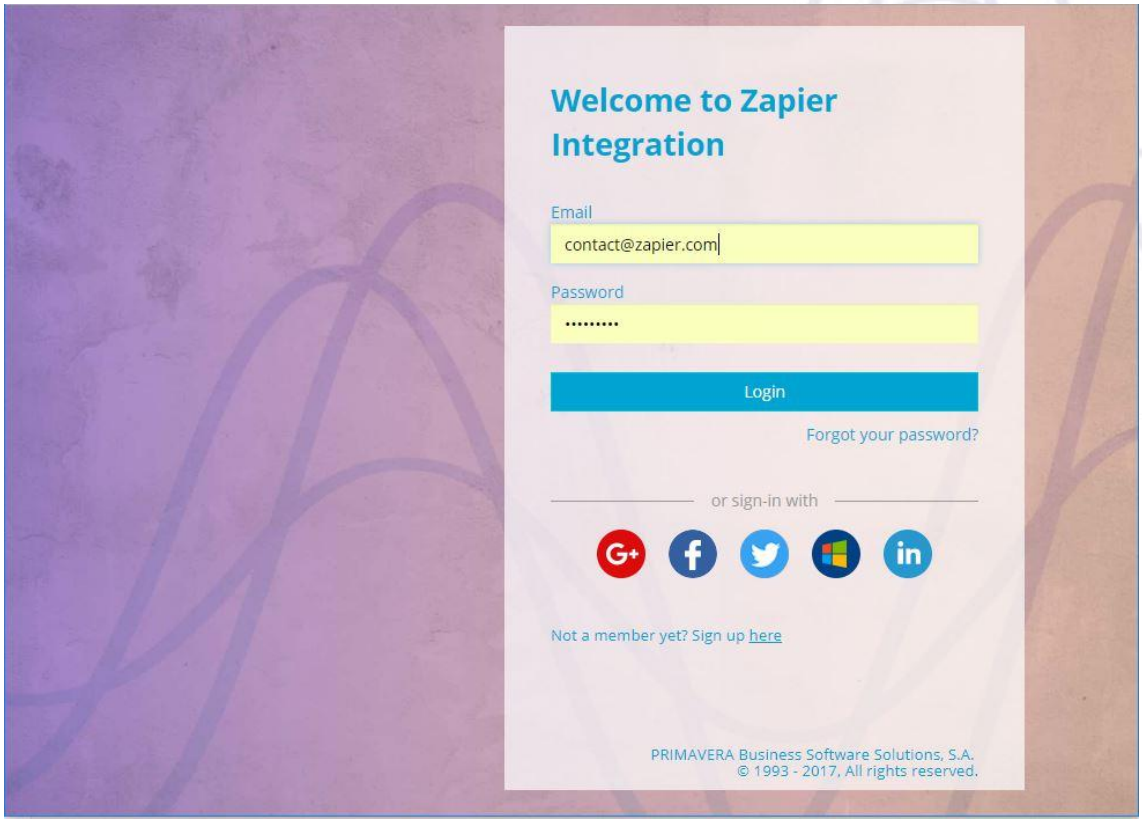
Please note that you can also select **Jasmin** and the other app(s) you wish to integrate from the app search. Then select one of the available templates and you will get a preconfigured integration to which you will only have to associate your accounts for Jasmin and the other apps. To make this process easier, there is a Zapbook that contains all available templates created by other Zapier users at https://zapier.com/app/explore.

4.1. Create a Zap from scratch

To create a completely new zap associated with Jasmin, follow these steps:

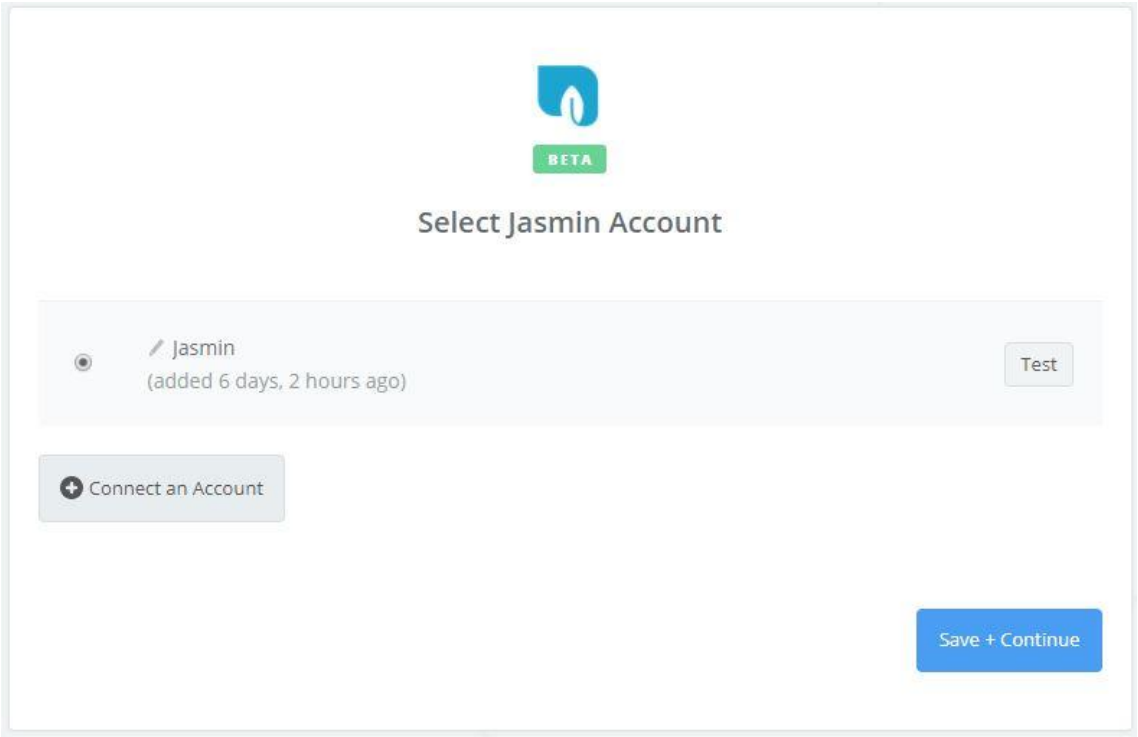
- Select **Make a Zap**;
- Specify whether Jasmin is the source or target of the integration;
- Associate Jasmin with one or more Triggers or Actions available from Zapier;
- Press **Save + Continue**;
- Then you will be invited to associate a Jasmin account to the Zap or select a previously associated account.

If you choose to create a new account, a new Jasmin pop-up window will be displayed requesting the credentials for the Jasmin account you wish to connect to Zapier. Login on this window and authorize your connection between your account and Zapier.



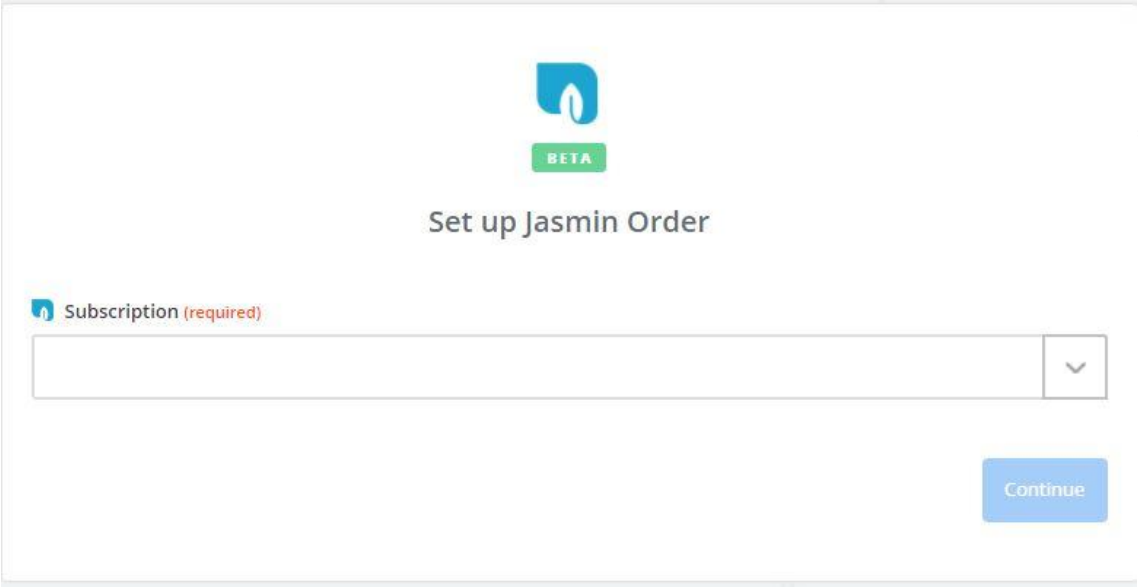
Picture 1

After authorizing, you will be returned to Zapier, where you will be able to select the associated Jasmin account.



Picture 2

- After selecting a Jasmin account, you will asked to associate a subscription from your Jasmin account to this Zap. Since a single Jasmin account allows for several subscriptions, specify which subscription will be used for the integration;
- After selecting and associating a subscription and any other required fields, press **Continue** to proceed to the next screen;



Picture 3

- Validate the integration data displayed on the screen (the association between the source and target fields). Next, you can finish this step and move on to a new one or finish the process by creating the integration;
- To finish the process, give a name to your newly created integration and select **Your Zap is ON** to activate it;
- Repeat these steps for the apps you wish to integrate.

4.2. Create a Zap from a Template

After selecting an application and then pressing **Continue**, the page will guide users through the construction process, providing them with assistance in configuring Triggers and Actions and testing their Zap.

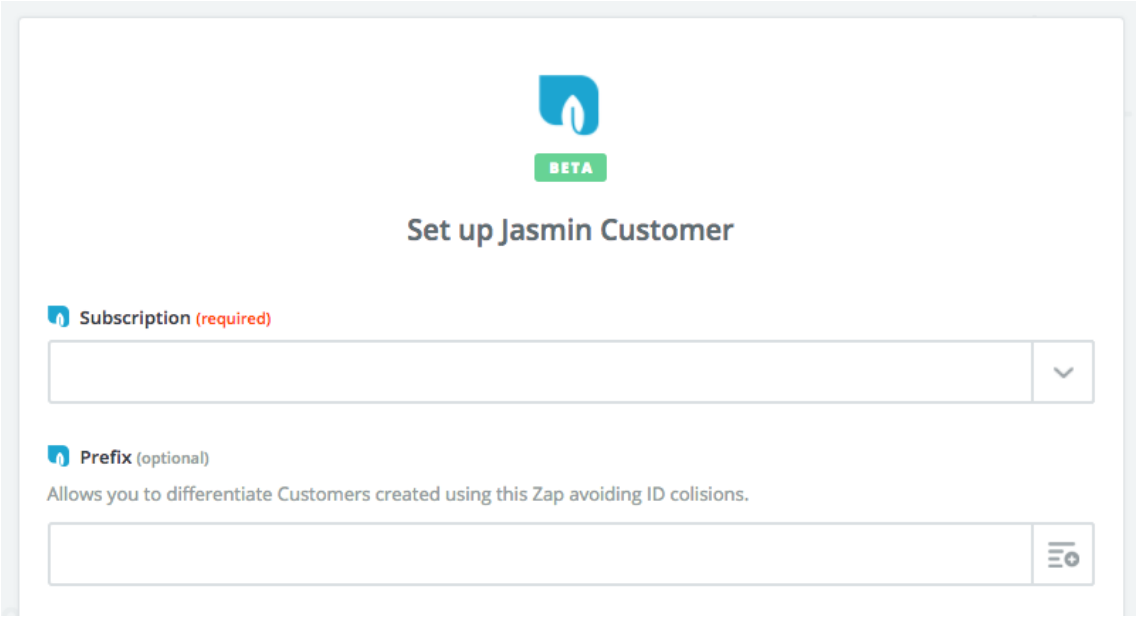
Here too, users must associate a valid account from each application and follow the suggested sequence of steps and validations, validating the selected information at each step.

5. Tips

To make the most out of Zapier integrations, see the following tips about prefixes, sequences and actions associated with customer orders.

5.1. Prefix

There is an option that allows you to choose a prefix when you create some actions associated with Jasmin in Zapier.



Picture 4

In Jasmin, every entity, such as a customer or a sales item, must have a unique identifier: its ID. When you choose a prefix, you can specify different IDs to be used for customers and sales items created in Jasmin using Zapier.

By using the prefix, users ensure that Jasmin not only creates, but also updates each action record correctly, which prevents them from overlapping with other records already created in Jasmin. For this reason, we recommend using the prefix when you configure actions associated with your Jasmin account in Zapier, and even more so if you wish to be able to identify which records were created using this method.

To configure a prefix, you can choose a field provided by the entity associated with the Trigger or simply enter one that is clear to you. Prefixes can be alphanumeric but must not contain special characters.

If you wish to use prefixes, see the following tip – 5.2. Sequences in Jasmin.

5.2. Sequences in Jasmin

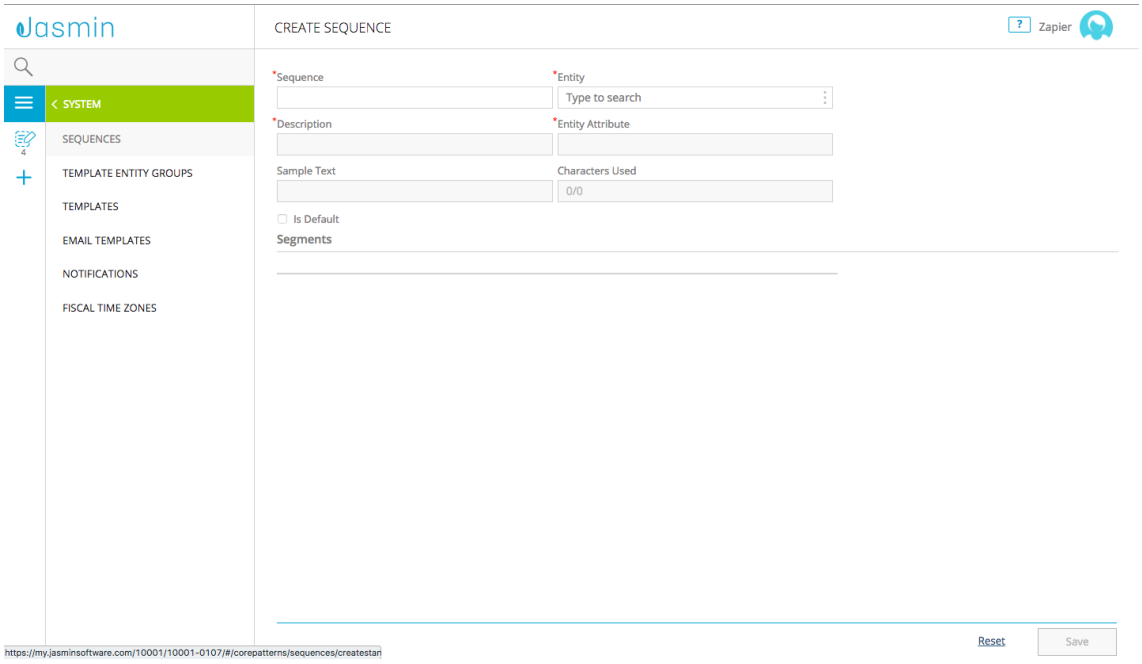
By default Jasmin will create a unique identifier – an ID − for each entity following a sequential number order such as, for example, 0001, 0002, 0003...

To avoid ID conflicts when entities are created both in Jasmin and through Zapier, you must change the Sequence associated with these entities in your Jasmin account configurations.

5.2.1. How to change the configurations for Sequences

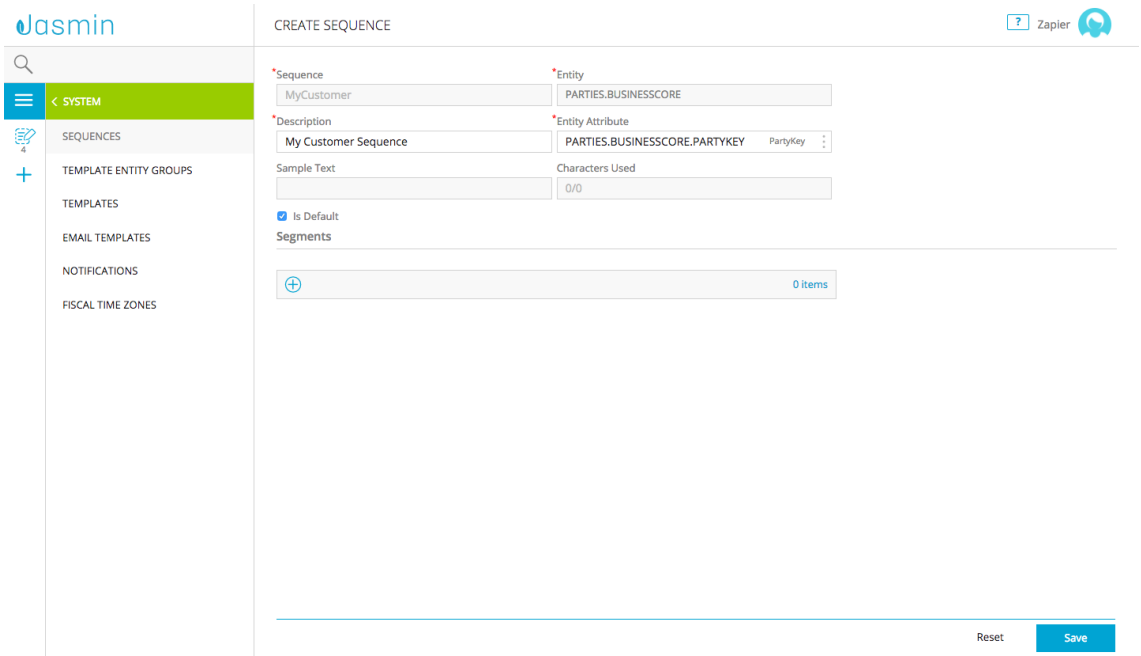
To change the configurations for sequences, follow these steps:

- Login into your Jasmin account;
- Access **Configuration** > **System** > **Sequences**;
- Click **Create** to create a new sequence;
- You will be redirected to the **Create sequence** form;



Picture 5

- Fill it in, namely the following fields:
    - **Sequence** − Name you wish to assign to the sequence that you are creating;
    - **Entity** – Identification of the entity for which you wish to use the sequence:
        - For sales items, select **ITEMS.BUSINESSCORE**;
        - For customers, select **PARTIES.BUSINESSCORE**.
    - **Description** – Enter a description for the Sequence;
    - **Entity attribute** – In this field:
        - For customer sequences, select **PARTIES.BUSINESSCORE.PARTYKEY**;
        - For sales items sequences, choose **ITEMS.BUSINESSCORE.ITEMKEY**.
- Select **Is Default**;
- Click **Add** (**+**) to continue creating the Sequence;



Picture 6

- A tab will be displayed, where you must:
    - Select **Text** as the **Segment Type**;
    - Specify a value up to 20 for the **Length**;
    - Type in a **Constant Text** that will be suggested by default for every customer or sales item you create;
    - Select **Is Required** and then **Save**.

For more information, check the article at (only available in Portuguese): .

5.3. Actions associated with Customer Orders

- If you are configuring an Action to create a customer order, make sure that the sales items and the customers were previously created in Jasmin and have matching IDs in both applications. This will ensure that orders are created successfully. You can use a Zap with several steps to help you with this task.
- To integrate orders in several currencies, you must previously configure the exchange rates for those currencies in Jasmin. If you do not do this, Jasmin will give you an error when you try to integrate a sales document in a currency with no exchange rate specified.

6. Popular Zaps

List of the more popular Zaps associated with Jasmin:

- Create organizations on Pipedrive from new customers on Jasmin
- Post Slack channel messages for new sales orders on Jasmin
- Create contacts on Google Contacts from new customers on Jasmin
- Create subscribers in MailChimp from new customers on Jasmin
- Create products on Magento 2.X from new sales items on Jasmin
- Send email notifications via Gmail when sales orders are created on Jasmin
- Add rows to a Google Sheets spreadsheet for new Jasmin sales orders
- Create sales orders on Jasmin from new orders on Magento 2.X

See more Jasmin integrations *powered by* Zapier.

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