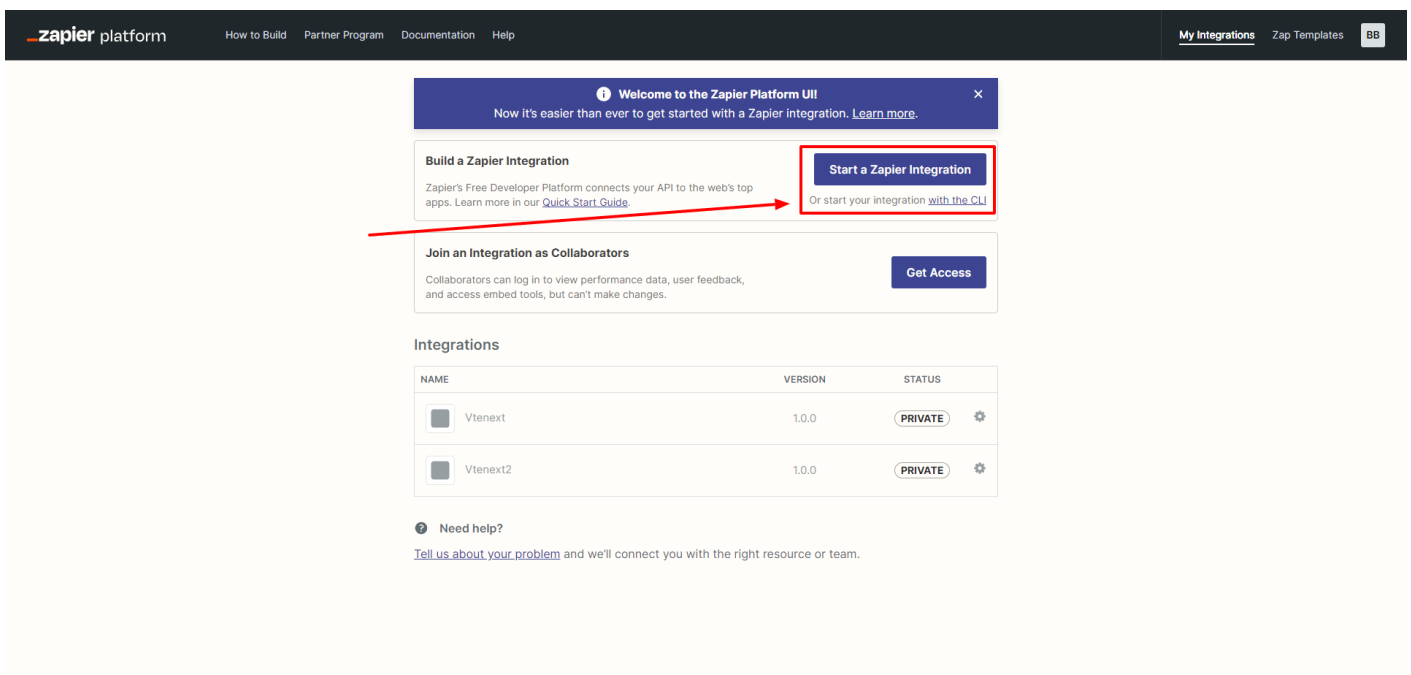


Nuova integrazione

Come creare un'integrazione con vtenext in Zapier

1. Come prima cosa è necessario andare su <https://developer.zapier.com/> effettuare l'accesso con le proprie credenziali Zapier, e cliccare su "Start a Zapier Integration"



2. E' poi necessario compilare tutti i campi che la schermata di Zapier ci chiede.

Esempio:

Name: vtenext

Description: Integra vtenext con Zapier

Audience: Private

Role: I have no affiliation with...

Category: CRM

zapier platform

How to BuildPartner ProgramDocumentationHelp

My IntegrationsZap TemplatesBB

Create Integration

Name (required)
The name of your app as it should display in Zapier.

Description (required)
A sentence describing your app in 140 characters or less, e.g. "Trello is a team collaboration tool to organize tasks and keep projects on track." [Learn more.](#)

Homepage URL (optional)
The homepage URL of your app. This will also be used as the email domain that would allow team members to join your integration as a Collaborator. [Learn more.](#)

Logo (optional)
Upload a square, 256x256px or larger transparent PNG image that does not include the app name. [Learn more.](#)

Drop image here or [select image](#)

Intended Audience (required)
Are you building a public or private integration? Public integration development receives priority support and launch promotion from the Zapier team.

Private: I'm building an integration for personal use or to explore the Zapier platform

Role (required)
What is your relationship with the app you're integrating with Zapier?

I have no affiliation with vtenext_new

If you do not have an official relationship with the owner of this API, Zapier cannot publish the app in its public directory. You may still create an integration for your own organization's use. See our [Developer Platform Agreement](#) for more detail.

Category (required)
How would you categorize your app? Choose the most appropriate option for your app's core features.

CRM (Customer Relationship Management)

Subscribe to Updates about your integration (optional)
☒ Get tips and recommendations about this integration along with our monthly newsletter that details the performance of your integration and the latest Zapier news.

CancelCreate

3. Dopo un messaggio di salvataggio eseguito e creazione avvenuta con successo, sarà possibile configurare il tipo di Autenticazione

zapier platform

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zapier

vtenext_new

PRIVATE

Version 1.0.0 | Status PRIVATE

Dashboard

BUILD

Integration Home

Authentication

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MANAGE

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Sharing

Manage Team

Monitoring

History

Integration Home

You're building a Private Integration

Private integrations allow you to extend what's possible on Zapier today using any API. You can start using it in Zaps as soon as you're ready. Only users you share your integration with will be able to use it in their Zaps. [Read more](#)

1

Authentication
Tell us how to authenticate users with your API. OAuth 2 is most common, but Zapier also supports a handful of options. [Learn more.](#)

Set Up Authentication

2

Triggers
Help users find new data as soon as it's available in your app. Triggers connect to webhooks or polling endpoints. [Learn more.](#)

3

Actions
Help users write data back to your integration. Actions create or update records through your API. [Learn more.](#)

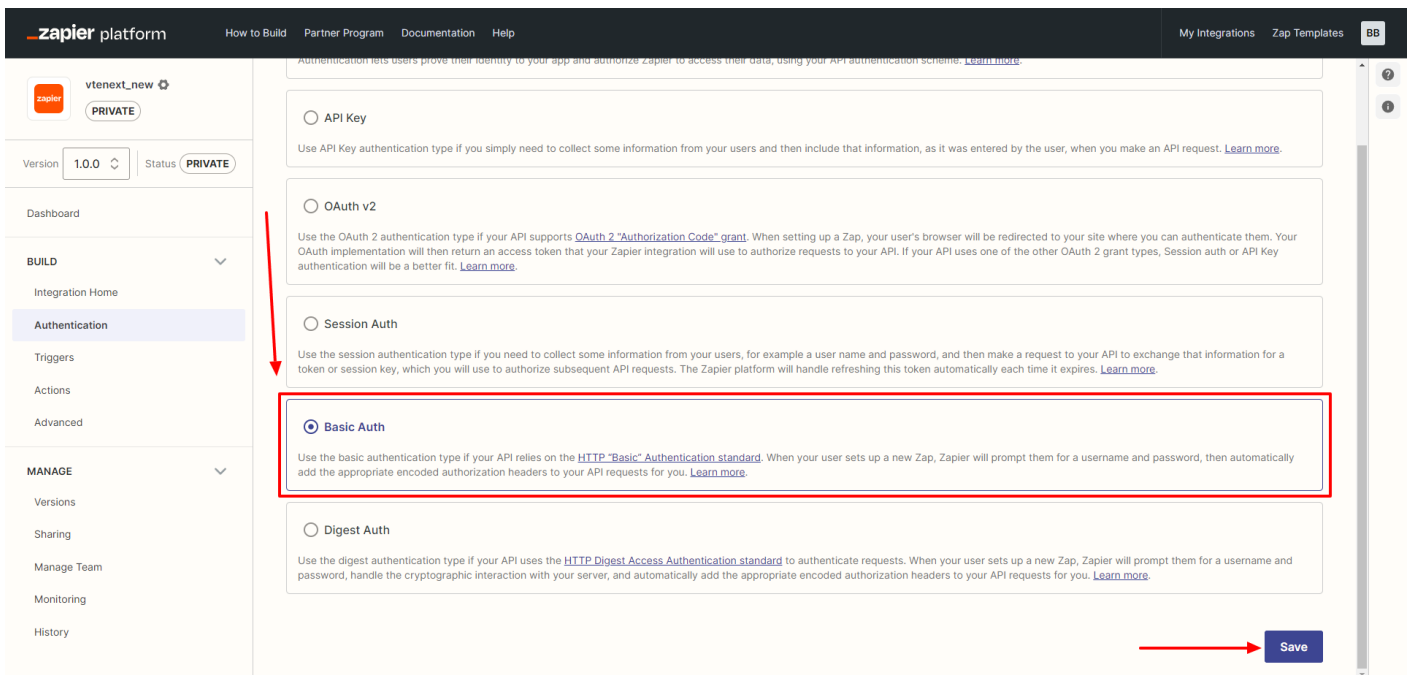
4

Validate Integration
Run automated checks to identify errors in your integration. We provide user experience recommendations to help you improve your integration. [Learn more.](#)

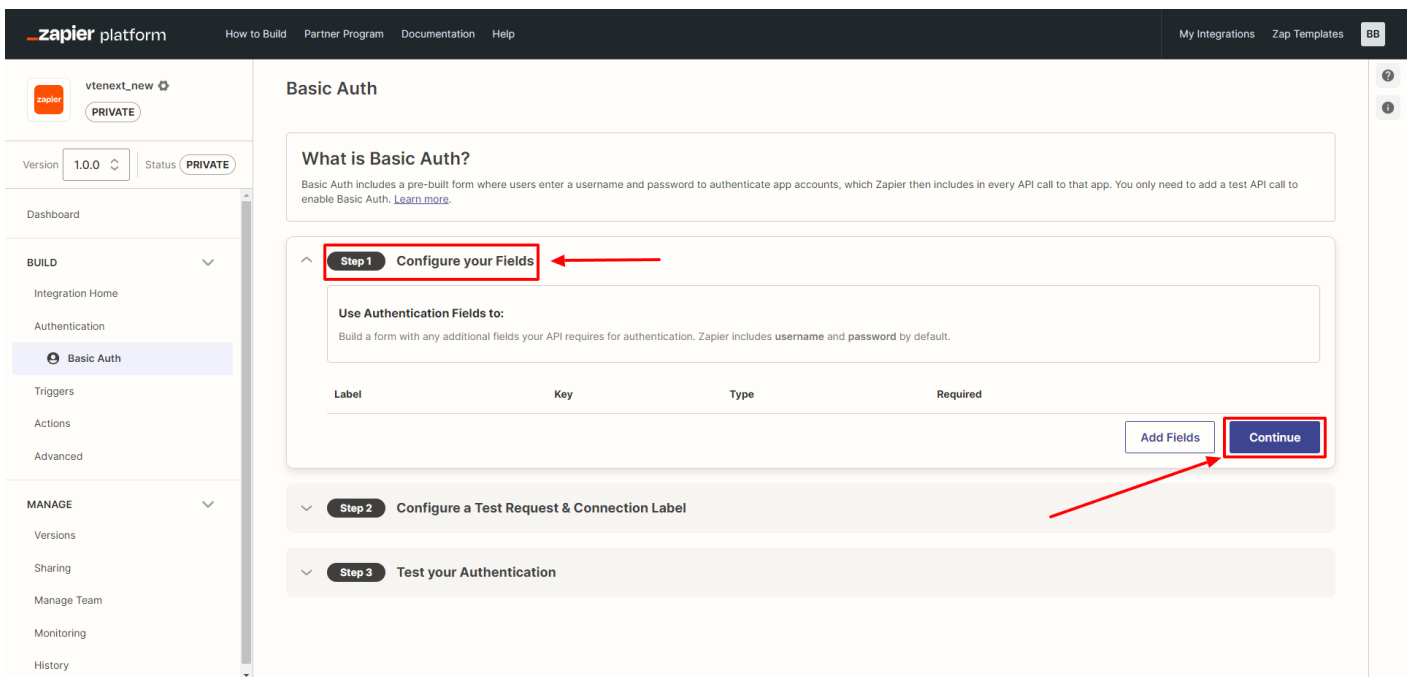
5

Share
Invite your team or users to automate their workflows using your integration via a link or email.

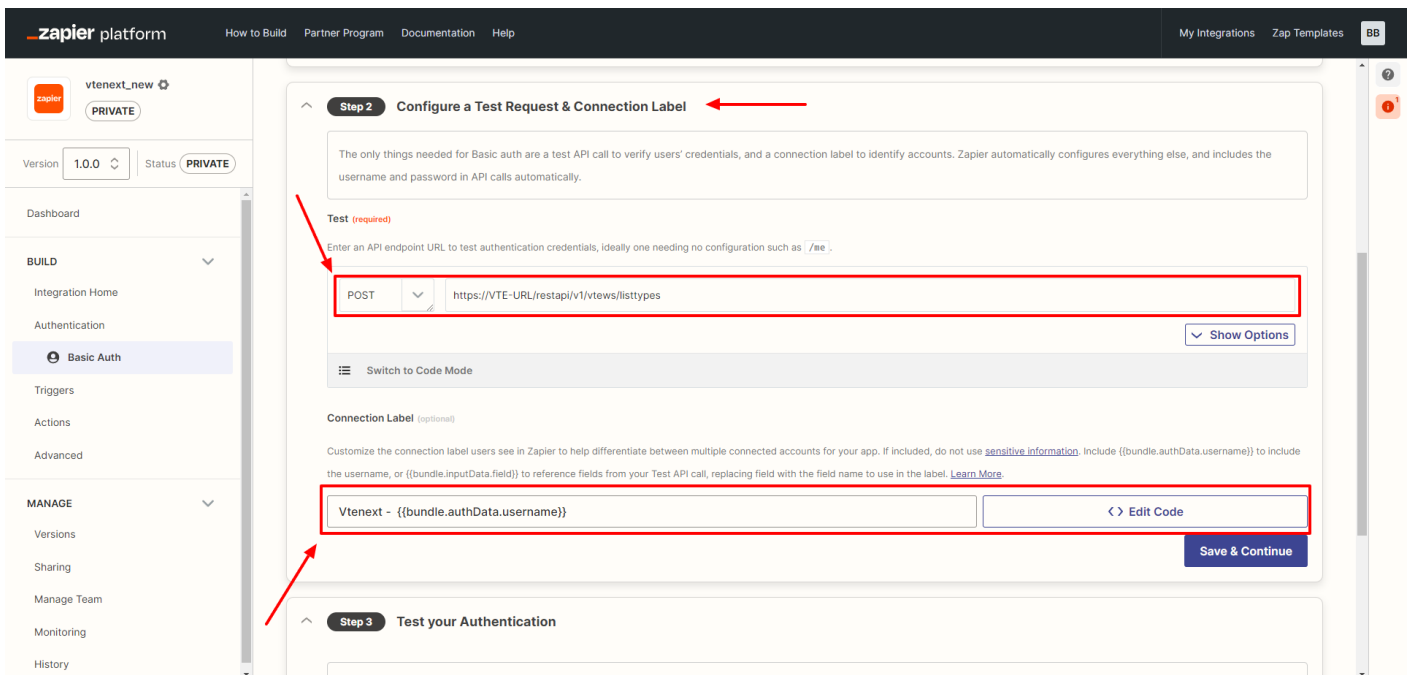
Dovrà essere selezionato BASIC AUTH e conseguentemente clicchiamo su SAVE



STEP 1: lasciare vuoto e cliccare su CONTINUE

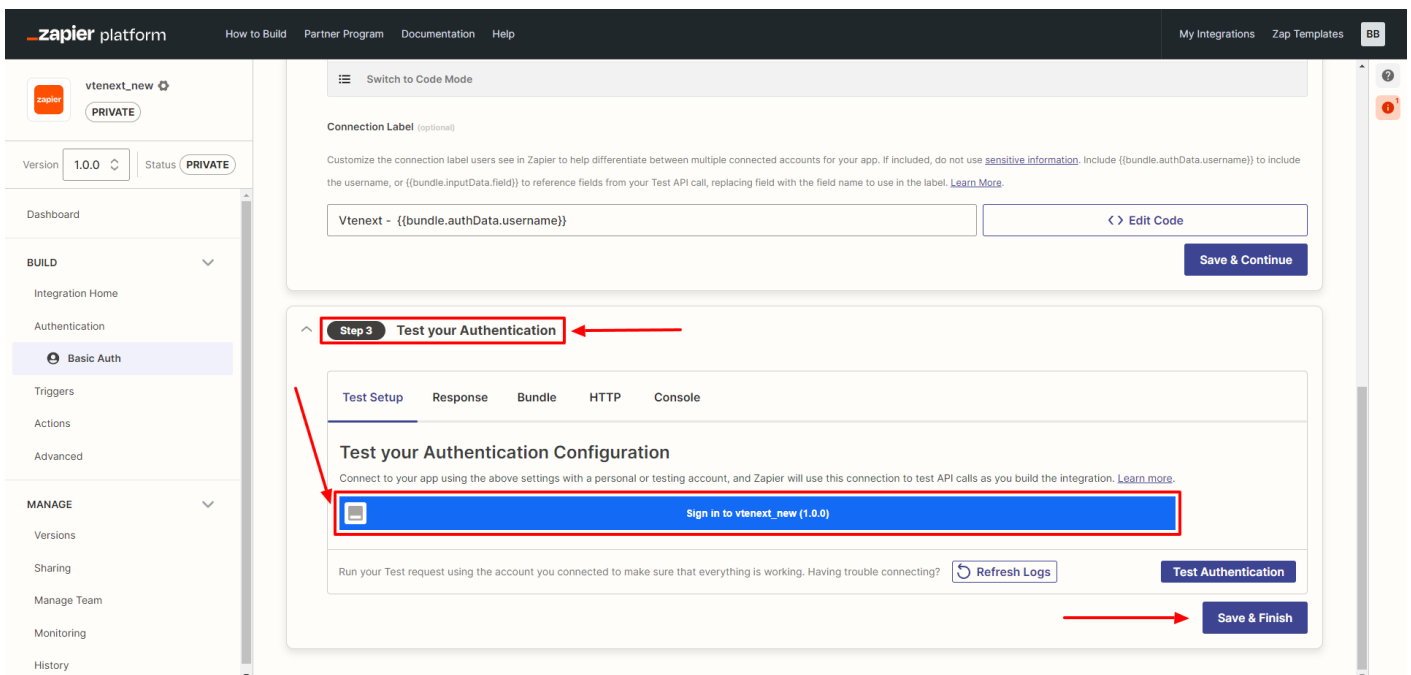


STEP 2: inserire nel test, il metodo post e configurare l'url la seguente stringa **https://VTE-URL/restapi/v1/vtews/listtypes** (dove VTE-URL è l'indirizzo assoluto della vostra installazione vtenext)



STEP 3: è giunto il momento di testare l'autenticazione, cliccando sul bottone azzurro "Sign In" e cliccando infine su **SAVE & FINISH**.

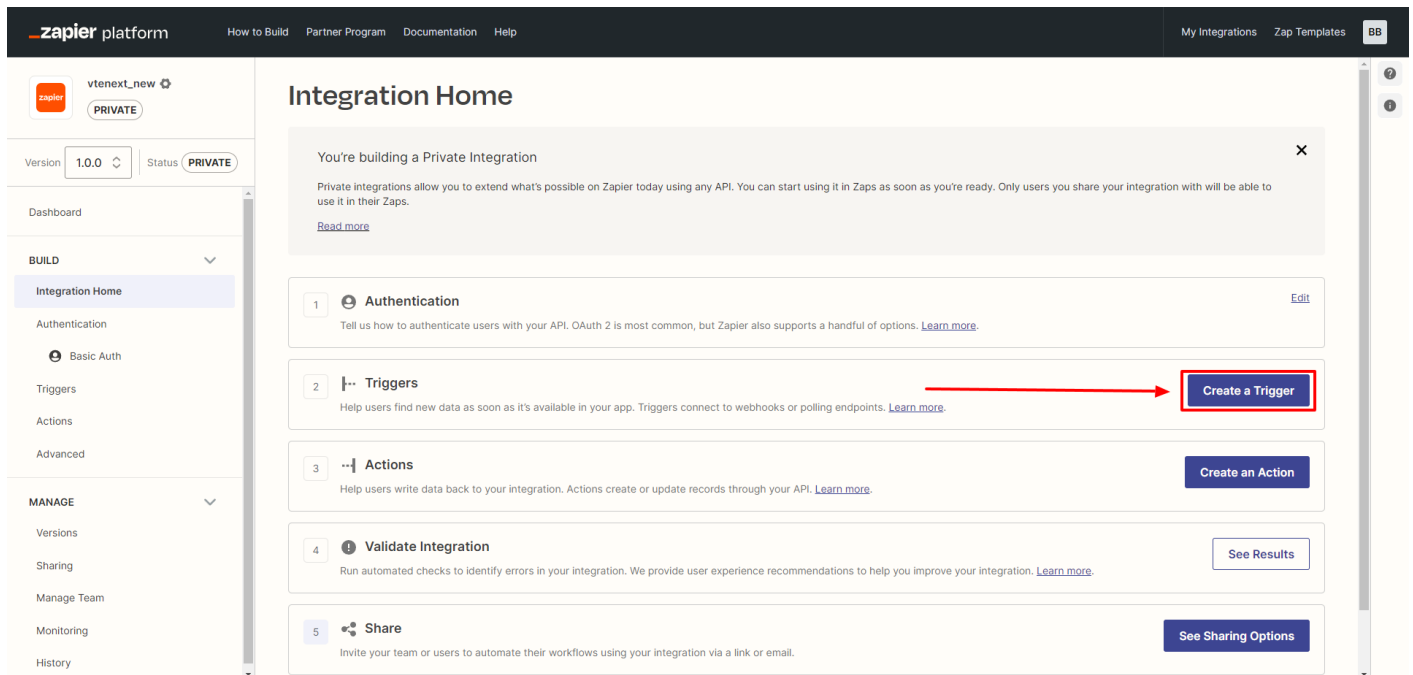
ATTENZIONE: la password da usare è l'accesskey dell'utente vtenext, che trovate nelle preferenze dell'utente stesso.



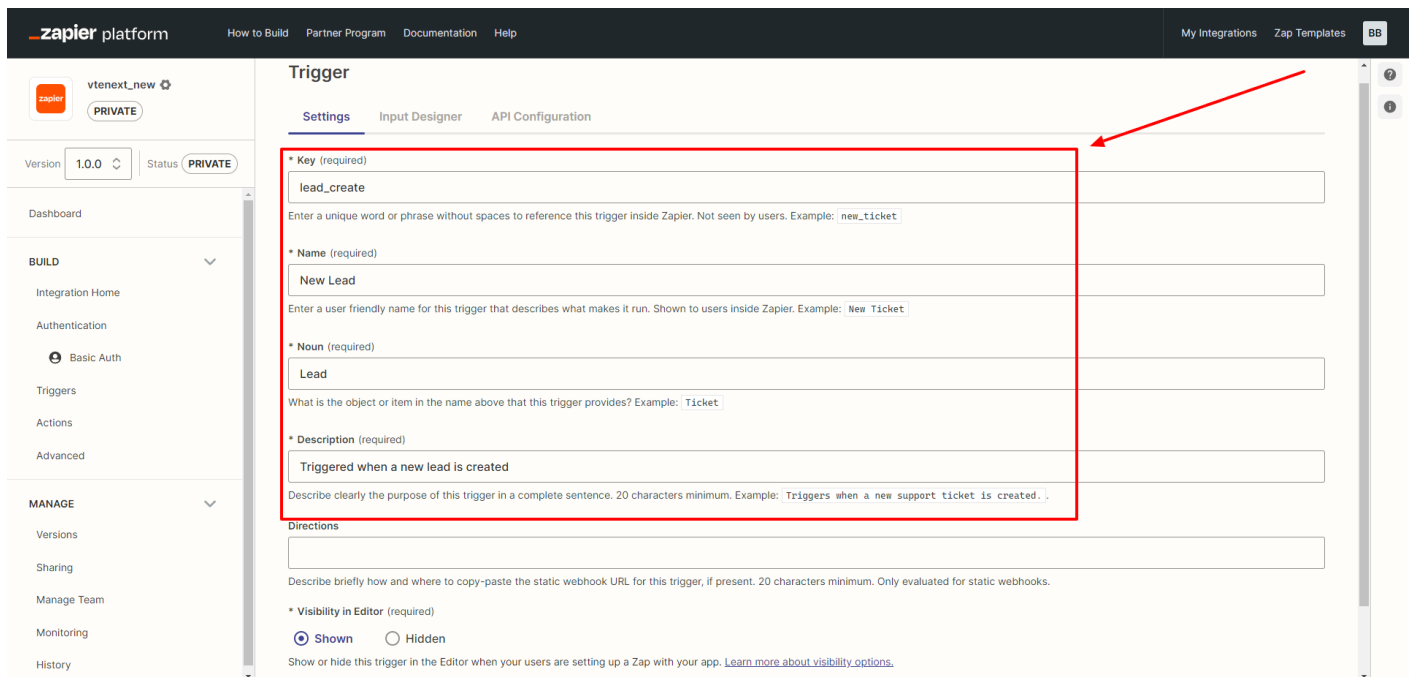
4. Creazione di un trigger

Questo passaggio è opzionale, è necessario solamente se si vogliono scatenare azioni lato Zapier quando in vtenext si verifica una qualche condizione (ad esempio alla creazione di un Lead o da qualsiasi altra condizione scatenata da un processo).

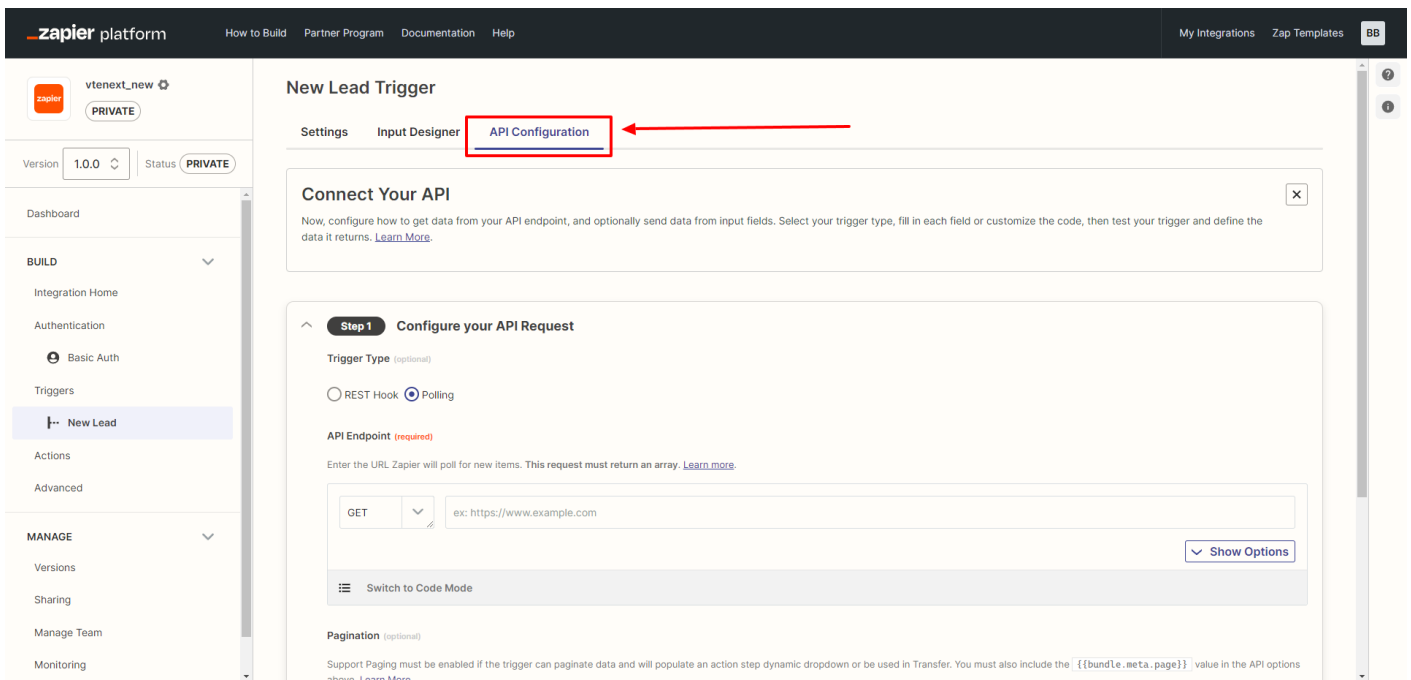
Aggiungiamo quindi un trigger come segue:



Cliccando sul pulsante CREATE A TRIGGER, verrà presentata una schermata con alcuni campi da compilare. Tali campi andranno gestiti in base a ciò che si vuole ottenere dal trigger stesso (nell'esempio si tratta di intercettare la creazione di un nuovo Lead).



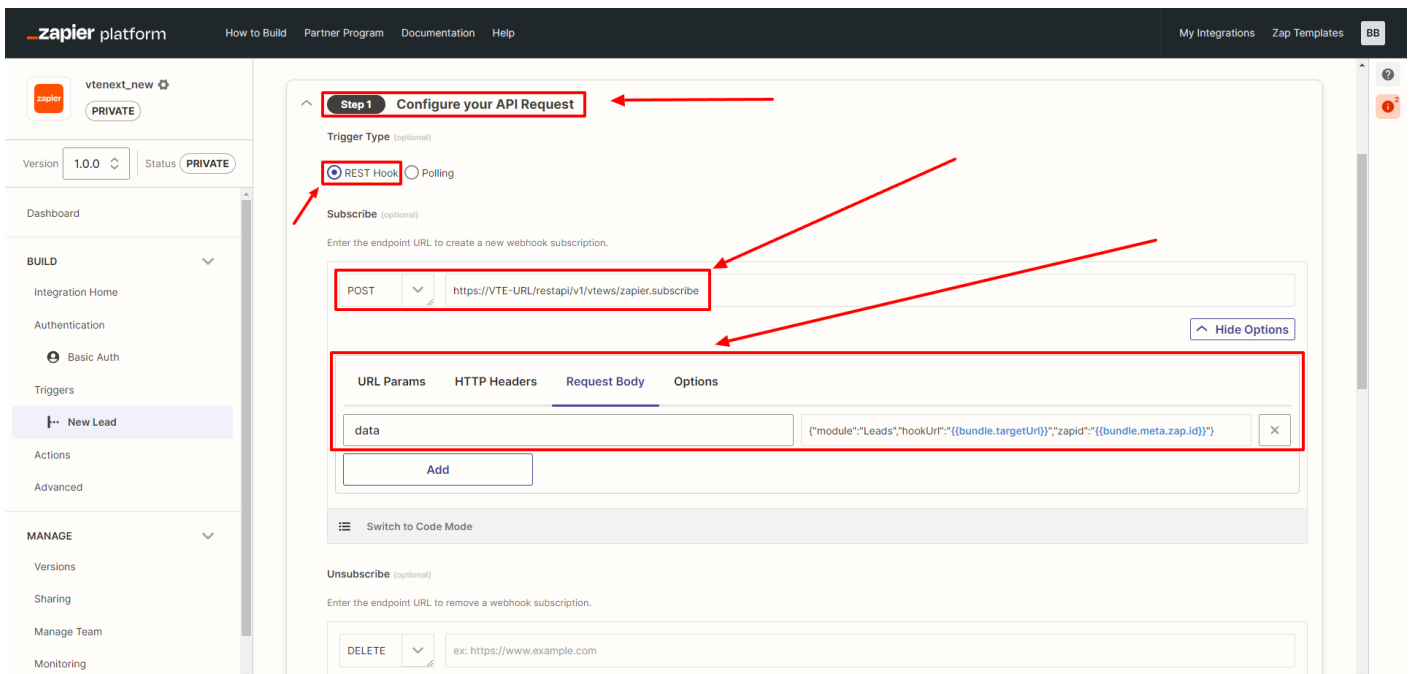
Una volta compilati tutti i campi, cliccare su **SAVE & CONTINUE** in fondo alla pagina sulla destra. Subito dopo comparirà la seguente pagina, dove sarà necessario cliccare su **API CONFIGURATION** per creare un web hook.



Allo **STEP 1** vanno scelti i seguenti parametri:

SUBSCRIBE

- REST Hook (è sufficiente selezionarlo)
- POST (si seleziona dal menu a tendina la voce POST e poi si scrive il web hook seguente, sostituendo VTE-URL con il corretto indirizzo del proprio crm)



```
https://VTE-URL/restapi/v1/vtews/zapier.subscribe  
{  
  "module": "Leads",  
  "hookUrl": "{{bundle.targetUrl}}",  
  "zapId": "{{bundle.meta.zap.id}}"  
}
```

In questo codice, è possibile sostituire Leads con il modulo che si desidera configurare.

Continuando la configurazione, scrollando in basso la pagina, troviamo l'opzione **UNSUBSCRIBE**, che dovrà essere configurata col seguente codice

Unsubscribe (optional)

Enter the endpoint URL to remove a webhook subscription.

POST

URL Params HTTP Headers Request Body Options

id

Switch to Code Mode

Perform List (optional)

Enter the endpoint URL Zapier should check for recent items, to provide sample data in the Zap Editor. This request must return an array. [Learn more.](#)

```
https://labs2.vtecrm.net:8443/restapi/v1/vtews/zapier.unsubscribe  
{{bundle.subscribeData.id}}
```

Continuando sul parametro **PERFORM LIST**, si dovrà configurare il seguente codice

Perform List (optional)

Enter the endpoint URL Zapier should check for recent items, to provide sample data in the Zap Editor. This request must return an array. [Learn more.](#)

POST

URL Params HTTP Headers Request Body Options

module

Switch to Code Mode

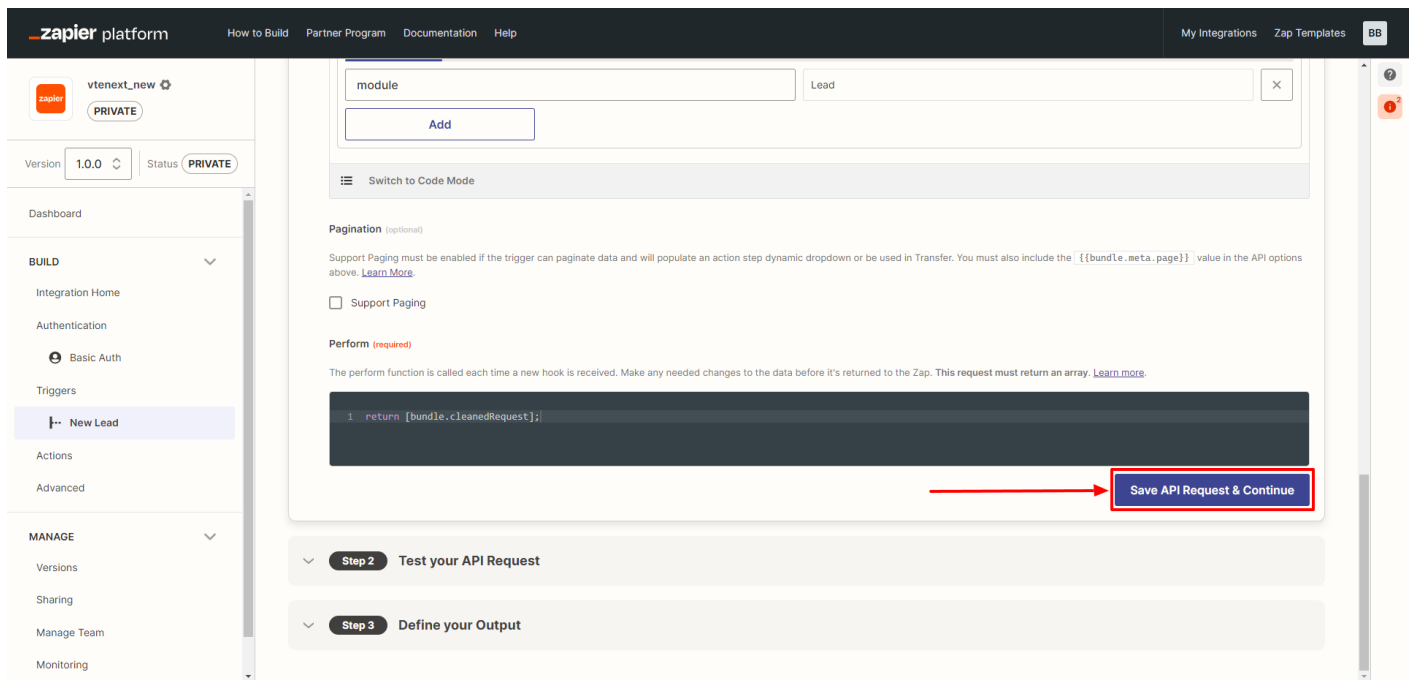
Pagination (optional)

Support Paging must be enabled if the trigger can paginate data and will populate an action step dynamic dropdown or be used in Transfer. You must also include the `{{bundle.meta.page}}` value in the API options above. [Learn More.](#)

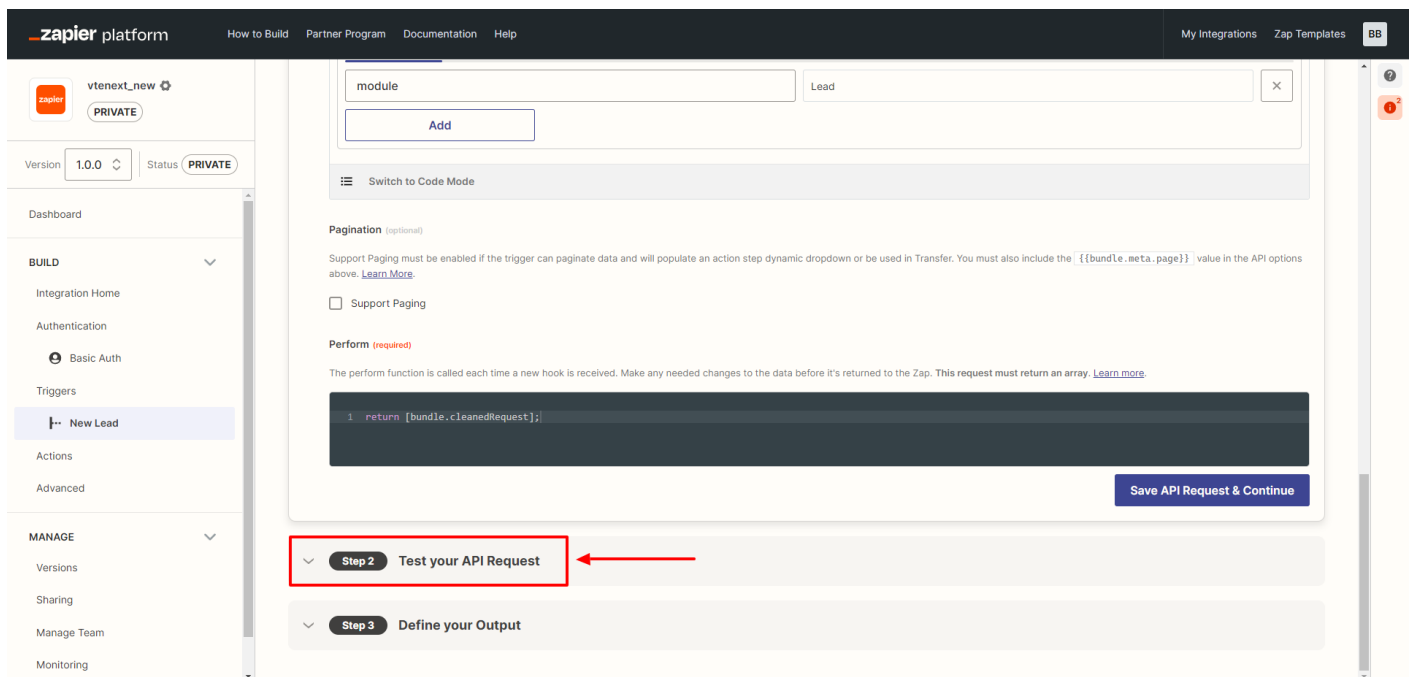
☐ Support Paging

```
https://VTE-URL/restapi/v1/vtews/zapier.perform_list  
Leads
```

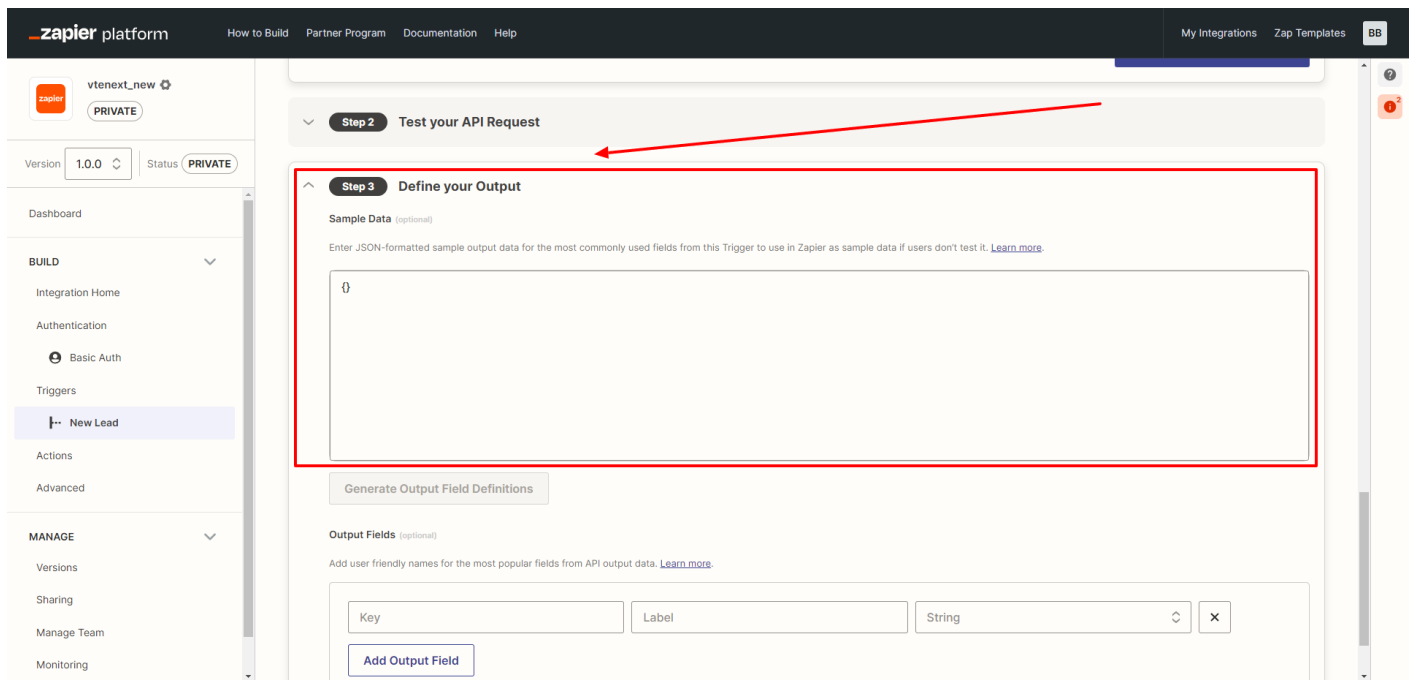
Infine su **PAGINATION** non c'è nulla da configurare e si clicca su **SAVE API Request & Continue.**



Allo **STEP 2** della configurazione del Trigger, **non va configurato nulla**.



Allo **STEP 3** della configurazione del Trigger, è necessario **lasciare vuoto** il campo presente in quel blocco.



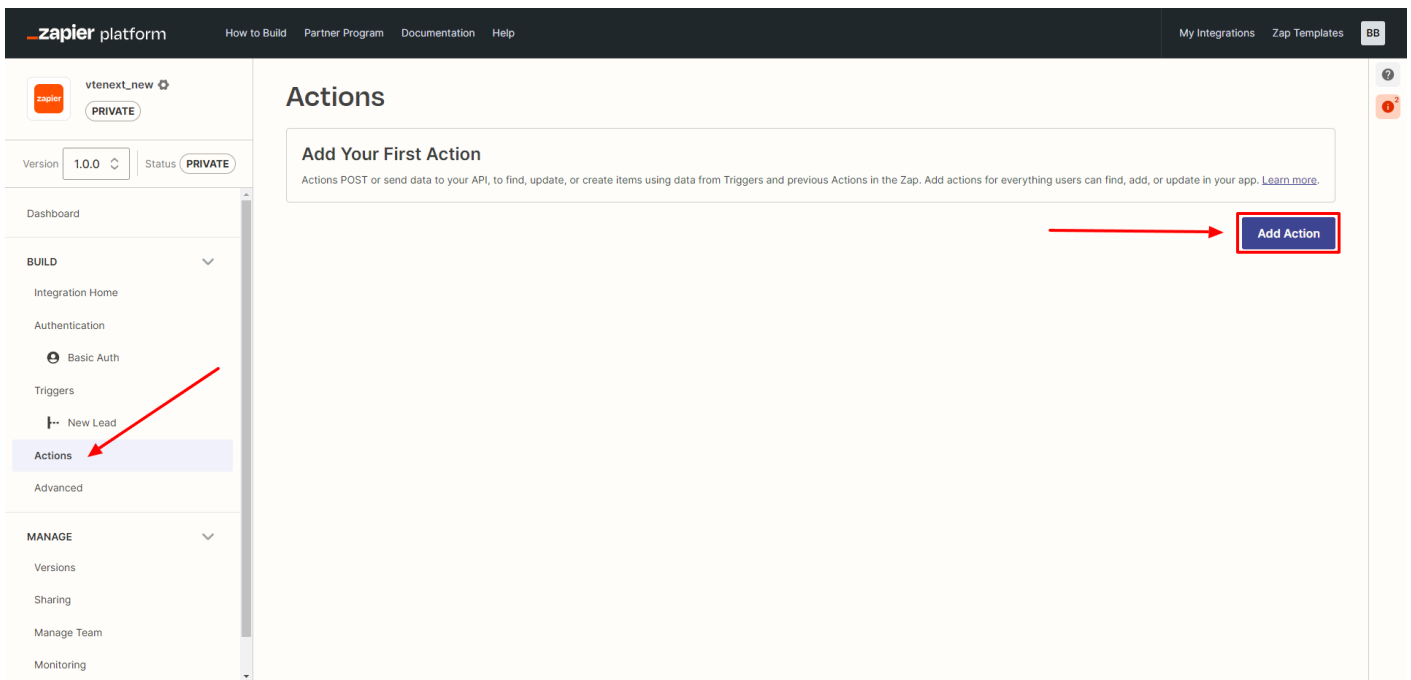
5. Creazione di azioni

Anche in questo caso, questo passaggio è opzionale, serve solamente se si vogliono scatenare azioni lato vtenext quando Zapier verifica le condizioni impostate. Le azioni eseguibili in vtenext sono: ricerca di un record, creazione, modifica o cancellazione.

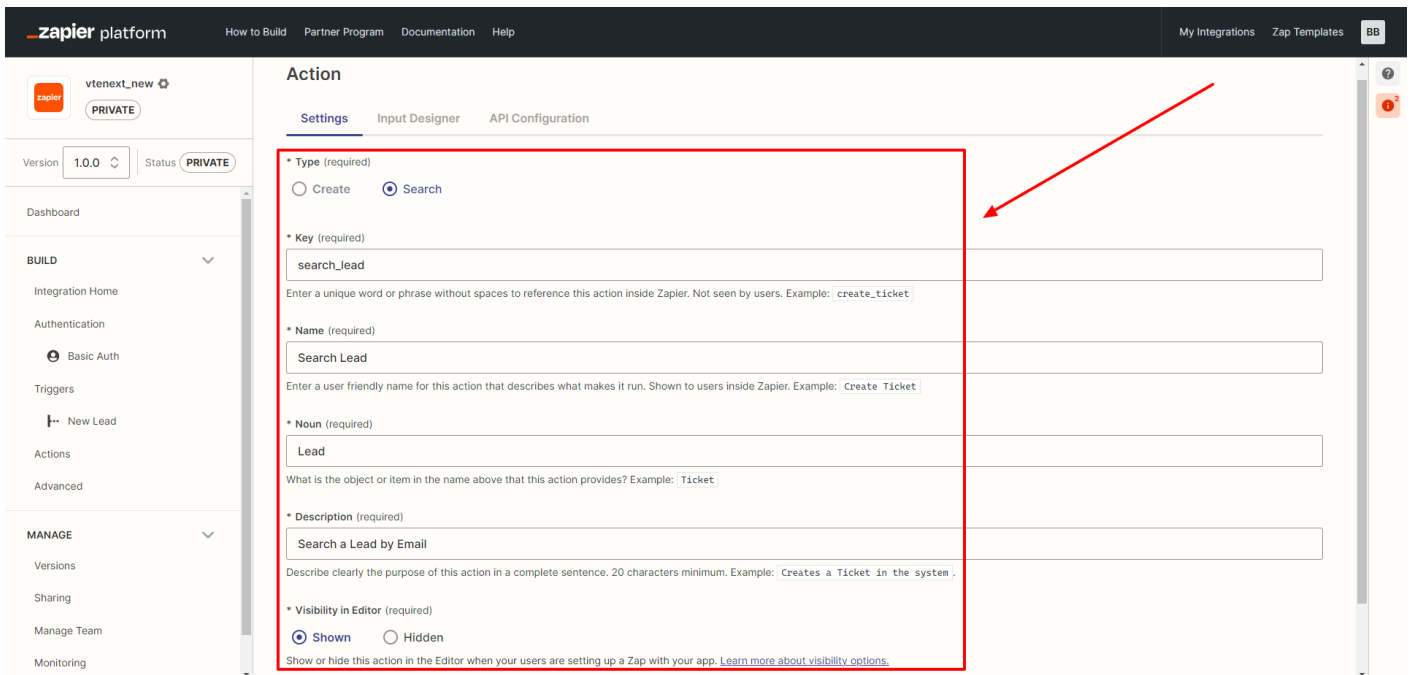
E' possibile inoltre creare solamente le azioni necessarie alla propria integrazione.

I. Azione Ricerca

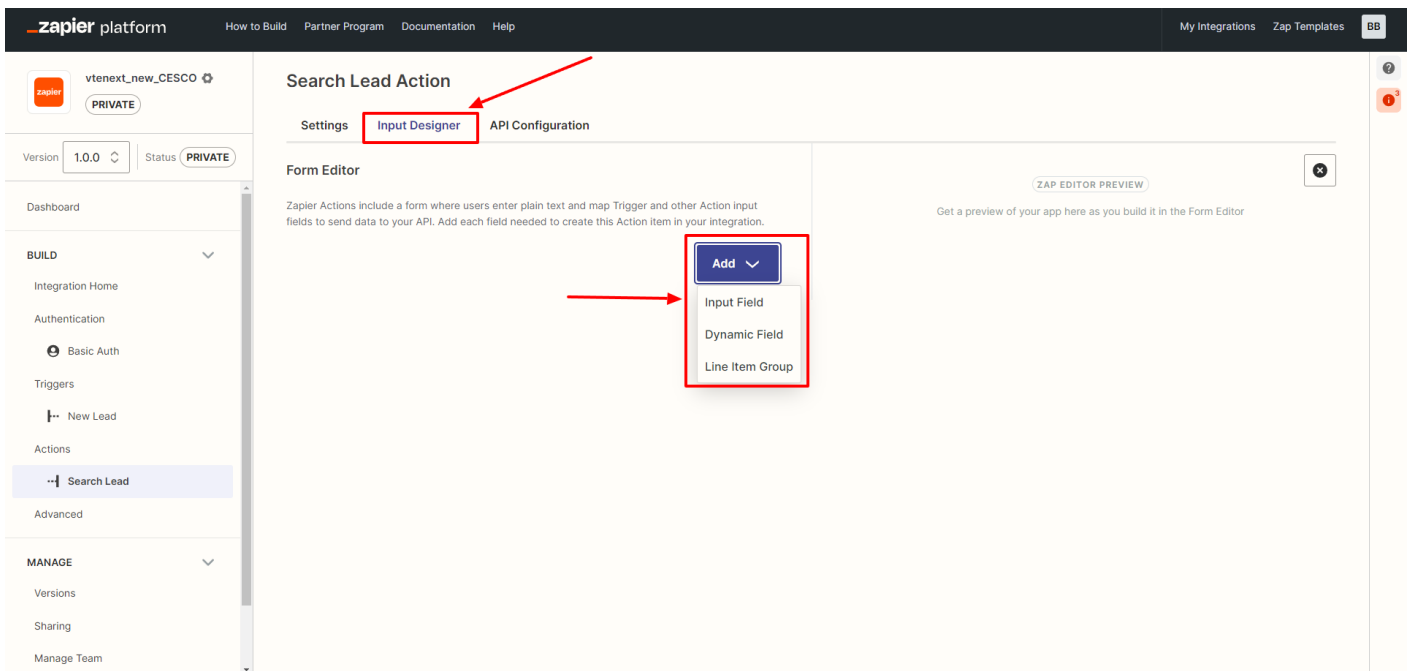
Sulla colonna di sinistra, va cliccata la voce **ACTIONS** e subito dopo sul bottone **ADD ACTION** presente invece sulla destra.



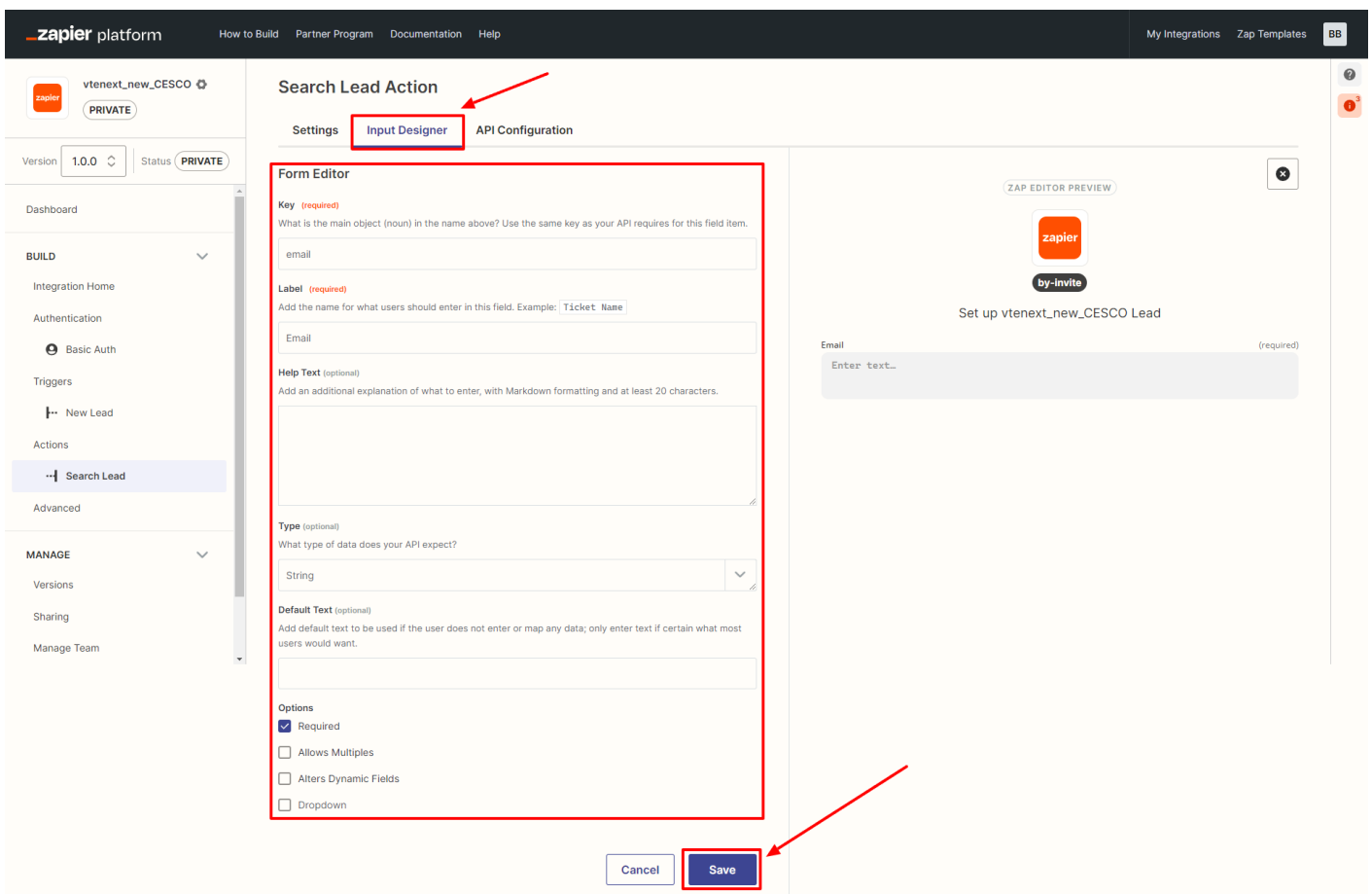
Si aprirà la seguente schermata che andrà compilata come mostrato



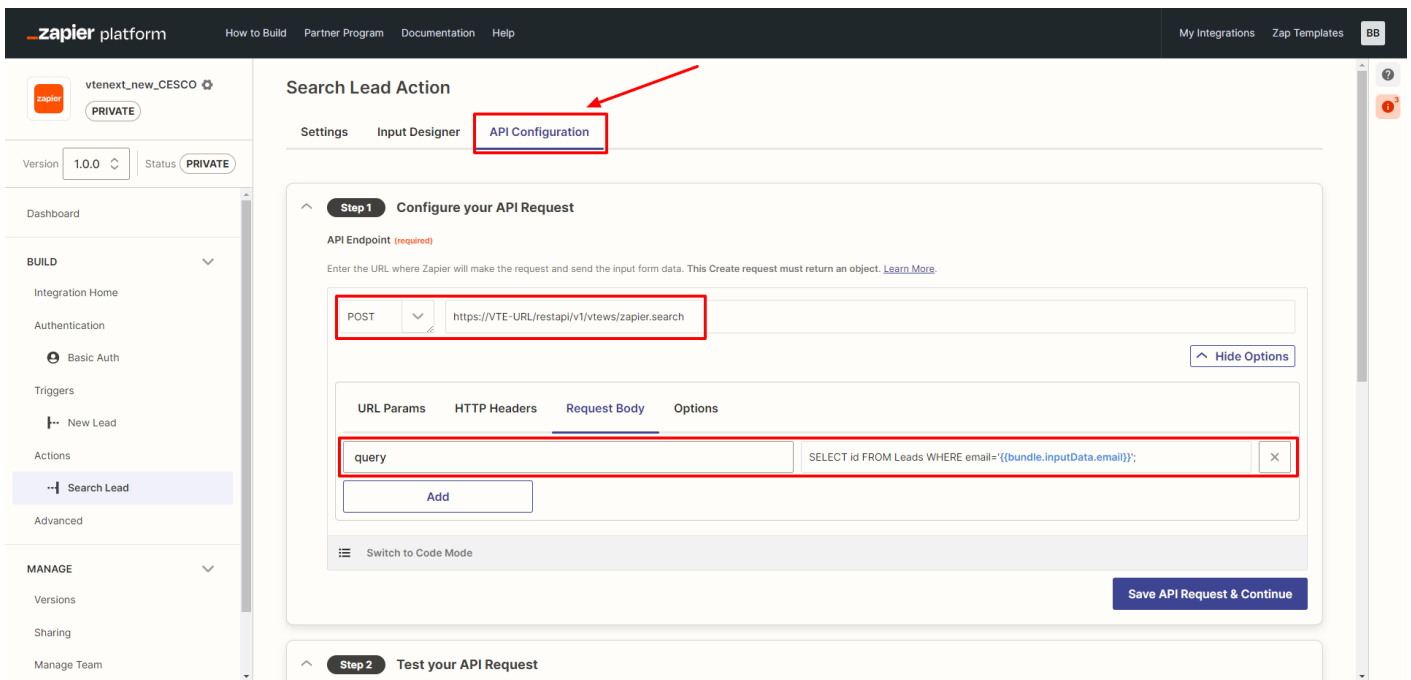
Finito di compilare i campi come mostrato nella precedente immagine, sarà possibile cliccare su **SAVE AND CONTINUE**. In questo modo si potrà passare alla TAB successiva per configurare l' **INPUT DESIGNER**.



In questa schermata, si dovrà cliccare su **ADD** e scegliere **INPUT FIELD** e comparirà la schermata di configurazione successiva



Inserire le variabili indicate negli appositi campi e cliccare dunque sul pulsante **SAVE** e si passa alla **TAB di API CONFIGURATION**



In questa schermata dovranno essere inserite le variabili come mostrato, chiaramente al posto di VTE-URL andrà inserito l'indirizzo completo della vostra installazione vtenext. Infine cliccare su **SAVE API REQUEST & CONTINUE**.

```
https://VTE-URL/restapi/v1/vtews/zapier.search  
SELECT id FROM Leads WHERE email='{{bundle.inputData.email}}';
```

Nello STEP 2, fase TEST di questa pagina, andrà inserito un indirizzo email per effettuare alcuni test di connessione (l'indirizzo dovrà essere valido ed esistente).

Alla TAB OUTPUT invece, è necessario:

1. utilizzare la risposta dai dati del test
2. generare definizioni dei campi di output
3. impostare il tipo appropriato per i campi

Infine cliccare su **SAVE OUTPUT & FINISH** in basso a destra.

II. Azione Crea

Cliccare sempre **ADD ACTION** per creare una nuova azione e compilare la prima schermata come segue:

zapier platform

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BB

zapier

Vtenext2

Private

Version 1.0.0

Private

Version overview

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Basic Auth

Triggers

New Lead

Actions

Create Lead

Update Lead

Delete Lead

Search Lead

Advanced

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Manage team

Create Lead Action

SettingsInput DesignerAPI Configuration

* Type (required)

Create

Search

* Key (required)

create_lead

Enter a unique word or phrase without spaces to reference this action inside Zapier. Not seen by users. Example: create_ticket

* Name (required)

Create Lead

Enter a user friendly name for this action that describes what makes it run. Shown to users inside Zapier. Example: Create Ticket

* Noun (required)

Lead

What is the object or item in the name above that this action provides? Example: Ticket

* Description (required)

Create a lead in Vtenext

Describe clearly the purpose of this action in a complete sentence. 20 characters minimum. Example: Creates a Ticket in the system

* Visibility in Editor (required)

Shown

Hidden

Show or hide this action in the Editor when your users are setting up a Zap with your app. [Learn more about visibility options.](#)

Cliccare **SAVE AND CONTINUE** e passare alla TAB successiva per configurare l'**INPUT DESIGNER**, in cui va aggiunto un nuovo **INPUT FIELD** configurato come segue:

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Create Lead Action

SettingsInput DesignerAPI Configuration

Form Editor

Next up — Create a Zap with this action!

Be sure to turn it on and let it run at least once with real data. This is required before publishing.

Create a Zap

Key (required)

What is the main object (noun) in the name above? Use the same key as your API requires for this field item.

dataField

Label (required)

Add the name for what users should enter in this field. Example: Ticket Name

dataField

Help Text (optional)

Add an additional explanation of what to enter, with Markdown formatting and at least 20 characters.

Type (optional)

What type of data does your API expect?

Dictionary

Default Text (optional)

Add default text to be used if the user does not enter or map any data; only enter text if certain what most users would want.

Options

Required

Allows Multiples

Alters Dynamic Fields

Dropdown

Cancel

Save

ZAP EDITOR PREVIEW

zapier

by-invite

Set up Vtenext2 Lead

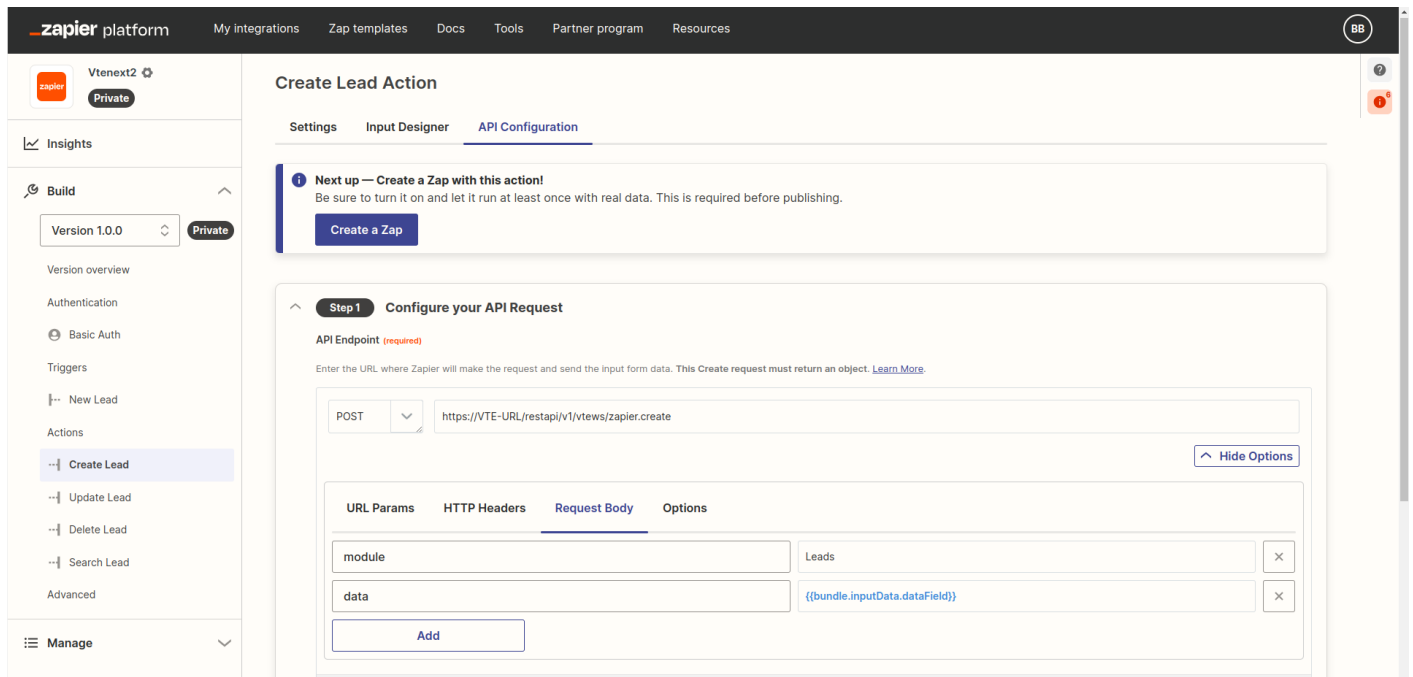
dataField

(required)

X

+

Cliccare su **SAVE** e passare al tab **API Configuration** e configurare i parametri nello **STEP 1** nel seguente modo:



```
https://VTE-URL/restapi/v1/vtews/zapier.create
```

```
module = Leads
```

```
data = {{bundle.inputData.dataField}}
```

Ovviamente VTE-URL va sostituito con l'indirizzo completo della vostra installazione vtenext, mentre il termine "Leads" può essere sostituito con un altro modulo, se si desidera creare una entità diversa in vtenext (ad esempio Contacts o Accounts). Infine cliccare su **SAVE API REQUEST & CONTINUE**.

Nello **STEP 2**, per effettuare un test di creazione lead scegliere **"Raw"** e sostituire il codice presente con il seguente:

```
{
  "inputData": {
    "dataField": {
      "firstname": "Test lead",
      "lastname": "Zapier",
      "phone": "123456789",
      "company": "Test Company Zapier"
    }
  },
  "authData": {},
  "environment": {},
}
```

```

"subscribeData": {},
"cleanedRequest": {
  "url": "https://example.com/hook-request-origin",
  "method": "POST",
  "body": {},
  "headers": {
    "Content-Type": "application/json"
  }
}
}
}

```

e cliccare su **Test Your Request**, che dovrebbe dare esito positivo e un Lead con nome "Test Lead" e cognome "Zapier" dovrebbe essersi creato nella vostra installazione vtenext. Cliccare **Finish Testing & Continue**.

Nello STEP 3 cliccare su **Use Response from Test Data** e poi **Generate Output Field Definitions** per mappare automaticamente i campi restituiti. Cliccare infine su **Save Output & Finish**.

III. Azione Aggiorna

Cliccare sempre **ADD ACTION** per creare una nuova azione e compilare la prima schermata come segue:

The screenshot displays the Zapier platform interface for configuring an 'Update Lead Action'. The left sidebar shows the 'Build' section with 'Update Lead' selected. The main area is titled 'Update Lead Action' and has three tabs: 'Settings', 'Input Designer', and 'API Configuration'. The 'Settings' tab is active, showing the following configuration options:

- * Type (required):** Radio buttons for 'Create' (selected) and 'Search'.
- * Key (required):** Text input field containing 'update_lead'. Below it, a note says: 'Enter a unique word or phrase without spaces to reference this action inside Zapier. Not seen by users. Example: create_ticket'.
- * Name (required):** Text input field containing 'Update Lead'. Below it, a note says: 'Enter a user friendly name for this action that describes what makes it run. Shown to users inside Zapier. Example: Create Ticket'.
- * Noun (required):** Text input field containing 'Lead'. Below it, a note says: 'What is the object or item in the name above that this action provides? Example: Ticket'.
- * Description (required):** Text input field containing 'aggiorna un campo di un lead'. Below it, a note says: 'Describe clearly the purpose of this action in a complete sentence. 20 characters minimum. Example: Creates a Ticket in the system'.
- * Visibility in Editor (required):** Radio buttons for 'Shown' (selected) and 'Hidden'. Below it, a note says: 'Show or hide this action in the Editor when your users are setting up a Zap with your app. [Learn more about visibility options.](#)'

Nella schermata di **INPUT DESIGNER** creare 2 campi di tipo **Input Field**, con le seguenti caratteristiche:

1. Key = id, Label = ID, Type = String, Required = yes
2. Key = dataField, Label = dataField, Type = Dictionary, Required = no

Una volta creati avremo quindi i seguenti campi:

The screenshot shows the Zapier platform interface for the 'Update Lead Action'. The left sidebar contains navigation options: Insights, Build (Version 1.0.0, Private), Version overview, Authentication, Basic Auth, Triggers, New Lead, Actions (Create Lead, Update Lead, Delete Lead, Search Lead, Advanced), and Manage. The main area is titled 'Update Lead Action' and has three tabs: Settings, Input Designer (selected), and API Configuration. The 'Input Designer' tab shows a 'Form Editor' with a message: 'Next up — Create a Zap with this action! Be sure to turn it on and let it run at least once with real data. This is required before publishing.' Below this is a table with two input fields:

Type	Label	Key	Sort	
Input Field	ID	id	↑ ↓	⚙️
Input Field	dataField	dataField	↑ ↓	⚙️

An 'Add' button is at the bottom right of the table. To the right of the table is a 'ZAP EDITOR PREVIEW' showing the 'Set up Vtenext2 Lead' form with fields for 'ID' (required) and 'dataField'.

Passare quindi al tab **API Configuration** e configurare i parametri nello **STEP 1** nel seguente modo:

The screenshot shows the 'Update Lead Action' interface in the 'API Configuration' tab. The 'Step 1: Configure your API Request' section is active. It shows the 'API Endpoint (required)' as 'https://VTE-URL/restapi/v1/vtews/zapier.update' with a 'POST' method. Below this are tabs for 'URL Params', 'HTTP Headers', 'Request Body' (selected), and 'Options'. The 'Request Body' tab shows two fields: 'data' with value '{{bundle.inputData.dataField}}' and 'id' with value '{{bundle.inputData.id}}'. An 'Add' button is at the bottom.

```
https://VTE-URL/restapi/v1/vtews/zapier.update
```

```
id = {{bundle.inputData.id}}
```

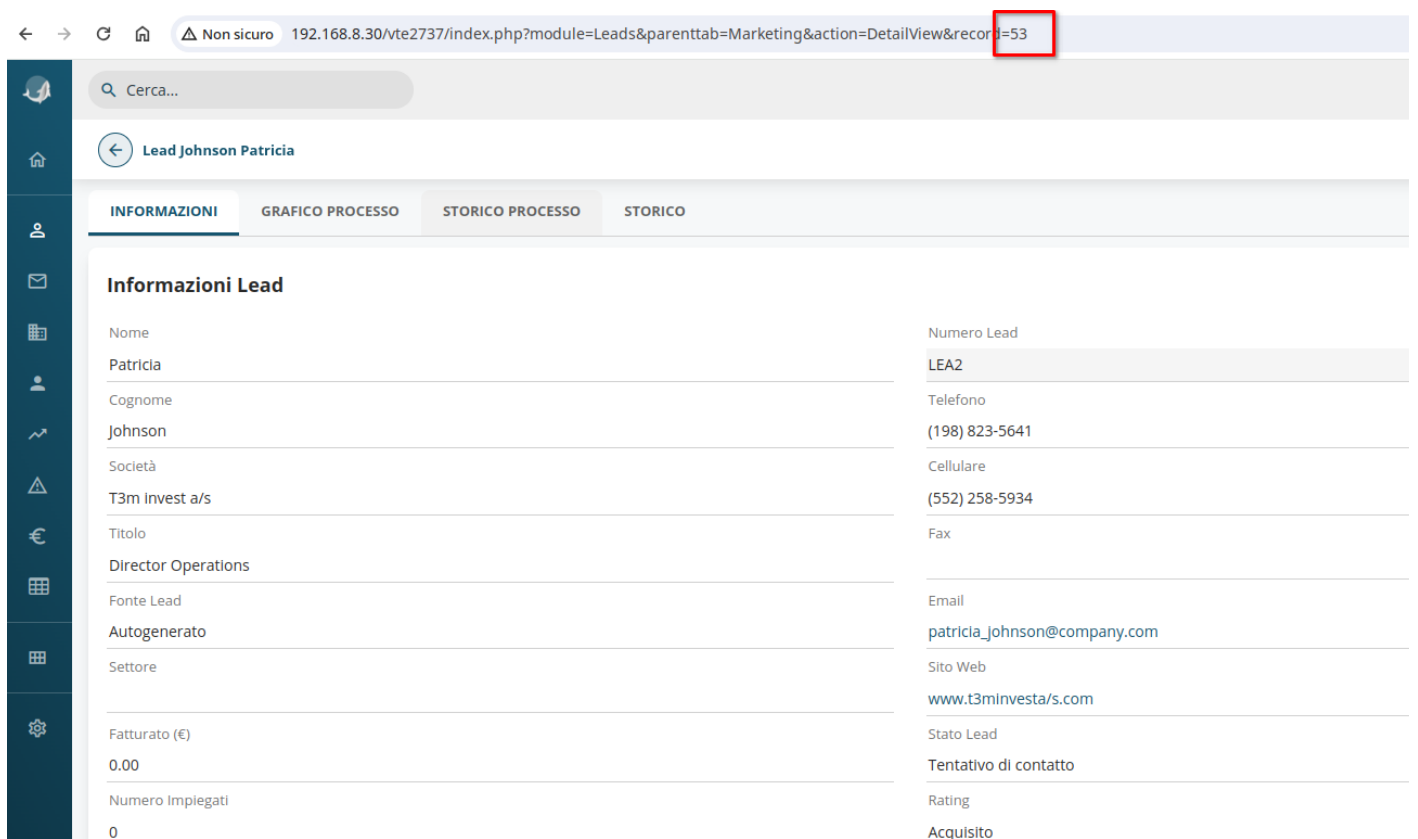
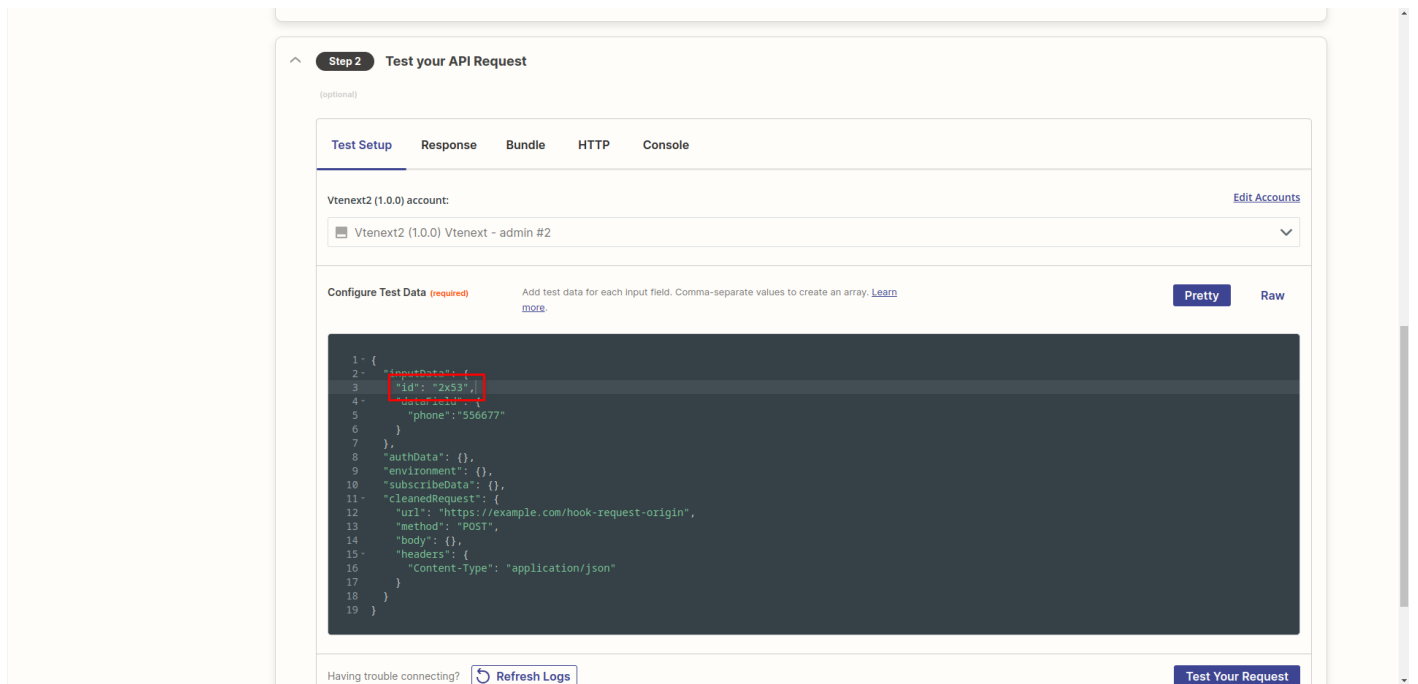
```
data = {{bundle.inputData.dataField}}
```

Sostituendo VTE-URL con l'indirizzo completo della vostra installazione vtenext. Infine cliccare su **SAVE API REQUEST & CONTINUE**.

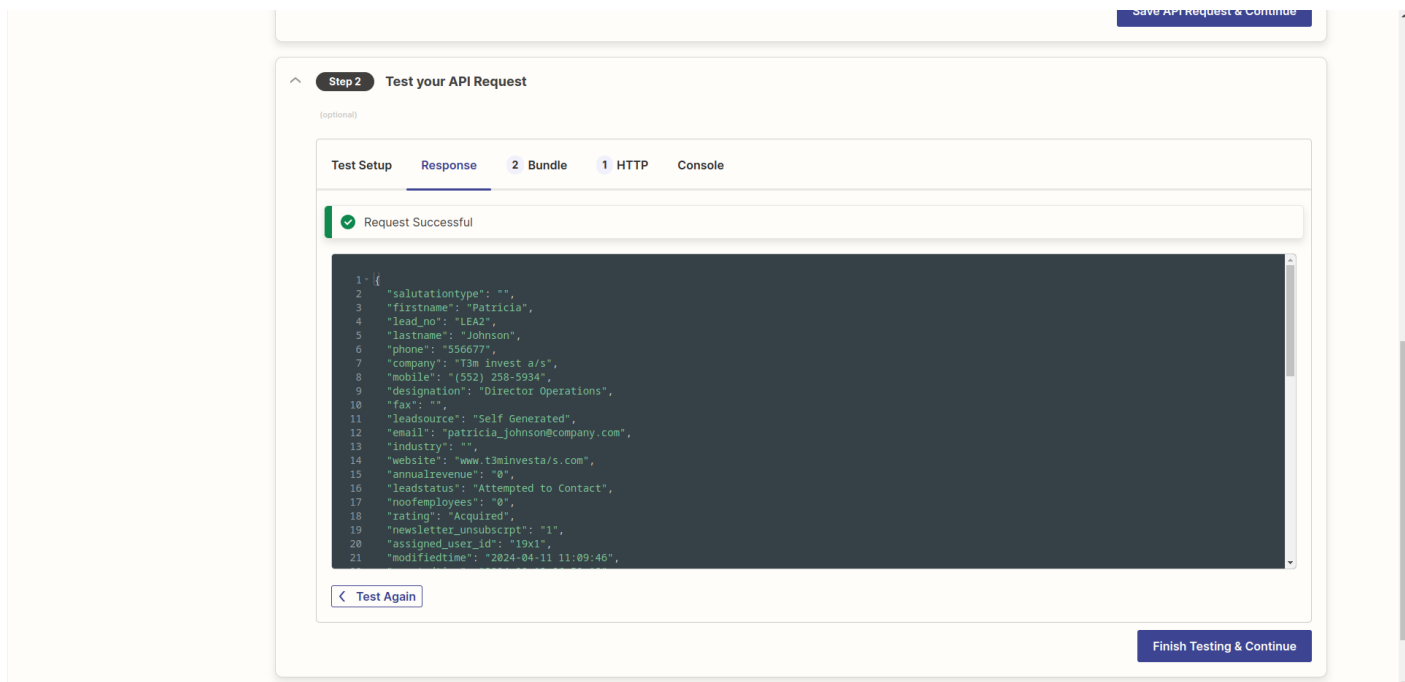
Nello **STEP 2**, per effettuare un test di modifica lead scegliere "**Raw**" e sostituire il codice presente con il seguente:

```
{
  "inputData": {
    "id": "2x53",
    "dataField": {
      "phone": "556677"
    }
  },
  "authData": {},
  "environment": {},
  "subscribeData": {},
  "cleanedRequest": {
    "url": "https://example.com/hook-request-origin",
    "method": "POST",
    "body": {},
    "headers": {
      "Content-Type": "application/json"
    }
  }
}
```

e sostituendo il "53" a riga 3 con l'ID di un lead presente in vtenext:



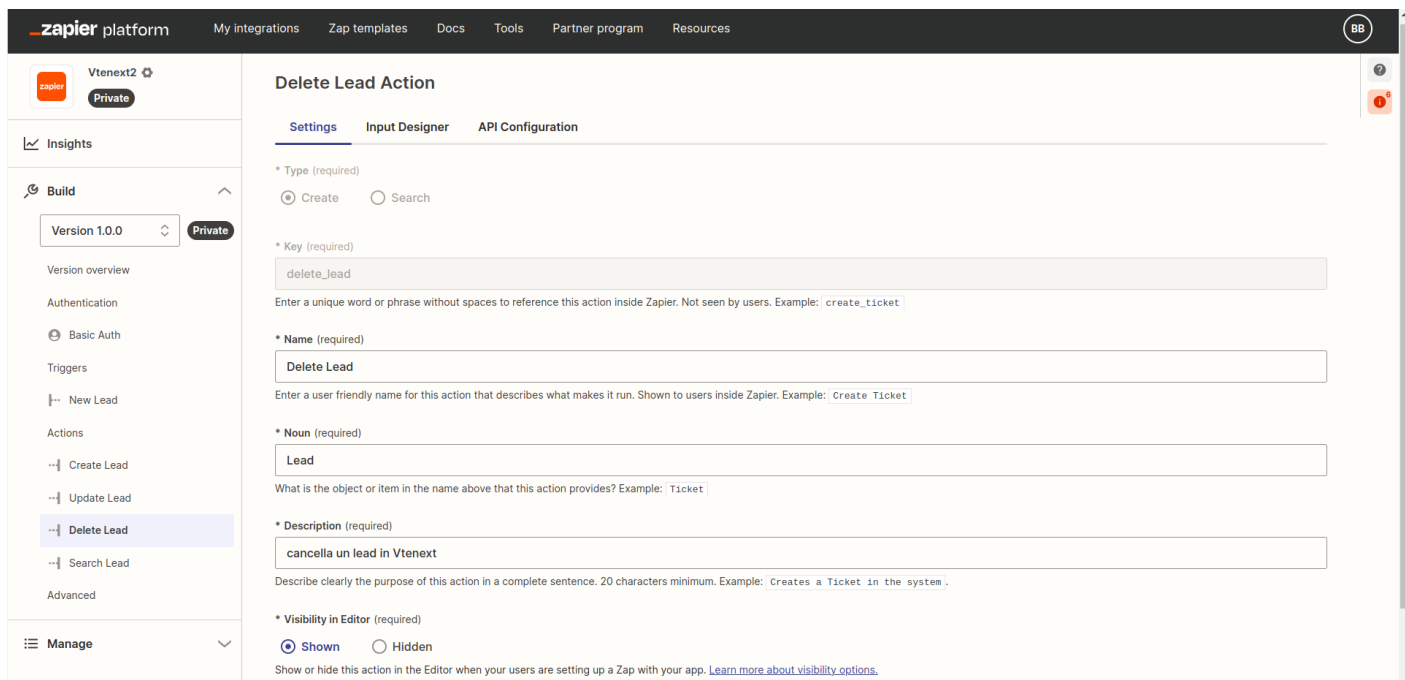
Cliccando su **Test Your Request** dovreste ottenere un risultato come il seguente:



Infine nello **STEP 3** cliccare sempre su **Use Response from Test Data** e poi **Generate Output Field Definitions** per mappare automaticamente i campi restituiti. Cliccare infine su **Save Output & Finish**.

IV. Azione Elimina

Cliccare sempre **ADD ACTION** per creare una nuova azione e compilare la prima schermata come segue:



Nella schermata di **INPUT DESIGNER** creare un campo di tipo Input Field, con le seguenti caratteristiche:

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Partner program

Resources

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zapier

Vtenext2

Private

Insights

Build

Version 1.0.0

Private

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Update Lead

Delete Lead

Search Lead

Advanced

Manage

Delete Lead Action

SettingsInput DesignerAPI Configuration

Form Editor

Next up — Create a Zap with this action!

Be sure to turn it on and let it run at least once with real data. This is required before publishing.

Create a Zap

Key (required)

What is the main object (noun) in the name above? Use the same key as your API requires for this field item.

id

Label (required)

Add the name for what users should enter in this field. Example: Ticket Name

ID

Help Text (optional)

Add an additional explanation of what to enter, with Markdown formatting and at least 20 characters.

Type (optional)

What type of data does your API expect?

String

Default Text (optional)

Add default text to be used if the user does not enter or map any data; only enter text if certain what most users would want.

Options

☒ Required

☐ Allows Multiples

☐ Alters Dynamic Fields

☐ Dropdown

CancelSave

ZAP EDITOR PREVIEW

zapier

by-invite

Set up Vtenext2 Lead

ID (required)

Enter text...

Passare quindi al tab **API Configuration** e configurare i parametri nello **STEP 1** nel seguente modo:

zapier platform

My Integrations

Zap templates

Docs

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Vtenext2

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Delete Lead Action

SettingsInput DesignerAPI Configuration

Next up — Create a Zap with this action!

Be sure to turn it on and let it run at least once with real data. This is required before publishing.

Create a Zap

Step 1 Configure your API Request

API Endpoint (required)

Enter the URL where Zapier will make the request and send the input form data. This Create request must return an object. [Learn More](#)

POSThttps://VTE-URL/restapi/v1/vtews/zapier.delete

Hide Options

URL ParamsHTTP HeadersRequest BodyOptions

id{{bundle.inputData.id}}

Add

Switch to Code Mode

```
https://VTE-URL/restapi/v1/vtews/zapier.delete
```

```
id = {{bundle.inputData.id}}
```

Sostituendo VTE-URL con l'indirizzo completo della vostra installazione vtenext. Infine cliccare su **SAVE API REQUEST & CONTINUE**.

Nello **STEP 2** inserire come valore di test l'ID del Lead che si vuole eliminare in formato webservice, quindi del tipo "2xCRMID", ad esempio:

The screenshot shows the Zapier interface for testing an API request. On the left sidebar, there are options: 'Create Lead', 'Update Lead', 'Delete Lead' (highlighted), 'Search Lead', and 'Advanced'. Below these is a 'Manage' dropdown. The main panel is titled 'Step 2: Test your API Request'. At the top right of this panel is a 'Show Options' button. Below it is a 'Switch to Code Mode' button and a 'Save API Request & Continue' button. The 'Test Setup' tab is active, showing a 'Request Failed' message with a red triangle icon. Below this, it says 'Vtenext2 (1.0.0) account:' followed by a dropdown menu showing 'Vtenext2 (1.0.0) Vtenext - admin #2'. There is an 'Edit Accounts' link. Below that is a 'Configure Test Data (required)' section with a link to 'Learn more'. It contains a table with two columns: 'id' and '2x1016'. There are 'Pretty' and 'Raw' buttons. At the bottom of the table, there is a 'Having trouble connecting?' link and a 'Refresh Logs' button. To the right of the table are 'Test Your Request' and 'Finish Testing & Continue' buttons. At the bottom of the main panel, there is a 'Step 3: Define your Output' section.

In questa azione non è necessario configurare lo **STEP 3** relativo all'output.

Congratulazioni! La creazione dell'integrazione è completa.

Si può ora passare a configurare degli specifici *ZAP* per compiere le azioni che si desiderano.

Revision #1

Created 2025-01-15 10:32:10 UTC by Daniele

Updated 2025-01-15 10:34:23 UTC by Daniele