Webhooks

Connect your CRM to external apps and services by automating data exchange whenever key events happen in your account.

Key Features

- **Outbound Webhooks**: Automatically notify an external service (like Zapier, Slack, or a custom app) when something happens in your CRM.
- **Inbound Webhooks**: Receive data from external services into your CRM using a unique URL you share with the other service.
- **12 Trigger Events**: Choose exactly which event fires the webhook — from a new lead to a signed contract.
- **Custom Payloads**: Define what data gets sent using a flexible template with dynamic variables.
- **Test & Monitor**: Send a test payload at any time and track success and error counts per webhook.
- **Enable / Disable**: Toggle any webhook on or off without deleting it.

Trigger Events

Webhooks can fire on any of these events:

Event	When it fires
Lead Created	A new lead is added
Form Submitted	A contact submits a form
Quote Accepted	A quote is accepted
Contract Signed	A contract is signed
Invoice Paid	An invoice is marked paid
Invoice Sent	An invoice is sent
Appointment Booked	An appointment is scheduled
Status Changed	A contact status changes
Tag Added	A tag is added to a contact
Payment Received	A payment is recorded
Project Completed	A project is marked complete
Portal Message	A client sends a portal message

How to Use

Create an Outbound Webhook

1. Click **New Webhook**.
2. Enter a name and select **Outbound (we call them)**.
3. Choose the trigger event.
4. Enter the external service's endpoint URL and HTTP method (POST, PUT, or PATCH).
5. Optionally add custom headers (e.g., an authorization token) and a payload template.
6. Click **Save Webhook**.

Create an Inbound Webhook

1. Click **New Webhook**.
2. Enter a name and select **Inbound (they call us)**.
3. Choose the trigger event that this incoming data represents.

4. After saving, copy the generated **Webhook URL** and paste it into the external service.

Test a Webhook

Click the **Test** button (flask icon) on any outbound webhook to send a sample payload and confirm it's working.

Enable or Disable

Click the **Toggle** button to activate or pause a webhook without deleting it.

Tips

- Use **payload templates** with `{{contact.name}}` and `{{contact.email}}` style variables to send dynamic data.
- The **Errors** column highlights any delivery failures in red — click **Test** to re-verify the connection.
- Use the **Direction** and **Status** filters to quickly find a specific webhook in a long list.
- Inbound webhooks receive data from services like payment processors or form tools and map it directly into your CRM.