# Webhooks

Connect your CRM to external apps and services by automating data exchange whenever key events happen in your account. ACME Creative Agency, for example, uses webhooks to notify their project tools the moment a client pays an invoice or a new lead comes in.

## Key Features

- **Outbound Webhooks**: Automatically notify an external service (Zapier, Slack, or a custom app) when something happens in your CRM — a signed contract, a paid invoice, a new lead.

- **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 Lead Created to Portal Message.

- **Custom Payloads**: Define what data gets sent using a flexible template with dynamic variables like contact name and email.

- **Trigger Filters**: Add optional conditions so a webhook only fires when specific criteria are met.

- **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.
- **Dashboard Stats**: See at a glance how many webhooks are total, active, inbound, and outbound.

# Trigger Events

Choose from 12 events: Lead Created, Form Submitted, Quote Accepted, Contract Signed, Invoice Paid, Invoice Sent, Appointment Booked, Status Changed, Tag Added, Payment Received, Project Completed, or 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), a payload template, and trigger filter conditions.
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 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 (vial 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, personalized data to external services.
- Error counts appear in red — click **Test** to re-verify a broken connection after fixing the endpoint.
- The **Last Fired** column shows exactly when each webhook last triggered, making it easy to spot stale or unused connections.
- Use the **Direction** and **Status** filters to quickly find a specific webhook in a long list.
- Select multiple webhooks and use **Delete Selected** to clean up in bulk.