



How Zapier makes you happier - automagically

Brian Clare, MBA, CPA, CMA and
Kellie Parks, CPB



A photograph of two young women with blonde hair, one in profile and one with her back to the camera, engaged in conversation outdoors at night. The background is dark with some blurred green foliage. The text "Take a minute to connect with your neighbour" is overlaid in white on the right side of the image.

Take a minute
to connect with
your neighbour

#QBConnect | WiFi: QBConnect

CPD Process

In order to receive CPD credit

- Be sure to sign in or scan your badge for this session
- You must stay in the session for the duration of the training
- This session is eligible for **1 hour of CPD**
- CPD certificates are emailed directly to you within 4 weeks of the conference date to the same email address you used to register

About today's speaker



I am a relentless organizer and believe cloud financial technology is key to organization

I'm a proud member of the Intuit Trainer Writer Network.

Kellie Parks, CPB

Cloud Accounting Aficionado

@kellie_parks

Agenda

Who are Kellie and Brian?

Getting ready to use Zapier

Getting started using Zapier

Sample Zaps

I'm certifiable!

Certified Professional Bookkeeper

QuickBooks Online Advanced Pro Certified

17Hats Partner, Acuity Partner, Aeroworkflow Partner, Dubsado Partner, Hubdoc Advanced Partner, Karbon Partner, Pandadoc Partner, Plooto Partner, Practice Ignition Partner, Receipt Bank, Reply Partner, Rewind Partner, TSheets Certified, WagePoint Certified, Waypay Wizard, Zoom Partner.

My personal life by the numbers

I have **3** grown kids and live with **2** unruly Australian Shepherds with **1** husband who is a [fly fishing guide](#) in a **100** year old lakeside cabin (that is chronically under renovation)

Daughter in law
Yes, I can count.



About today's speaker



I'm getting better at being a relentless organizer and do believe cloud financial technology is a key facilitator to organization

I'm a proud member of the Accounting Salon

Brian Clare, MBA, CPA, CMA

I like Clouds

@blueprintbrian

I'm certifiable!

Chartered Professional Accountant

QBO Advanced Pro Certified

Fathom Partner, Hubdoc Advanced Partner, Plotoo Partner, Practice Ignition Partner, Receipt Bank Partner, Rewind Partner, TSheets Certified, Veem Partner, WagePoint Certified, Zapier Certified Pro!, Zoom Partner.

My personal life by the numbers

I have **1** 5 month-old baby and live with
1 Cavapoo with small-dog syndrome and
1 wife who is a Registered Nurse in
Emergency Medicine and **1** ...
0 days a year that are my own as of
5-months ago



We couldn't be more different!

Brian...

is a city guy, tall, young, new dad in the sunrise & empire building stage of life and biz

- Is a Microsoft type
- Uses a ton of apps to pull his processes and workflows together
- Builds out Zaps that are many steps and stages to accomplish many outcomes
- Is a Zapaholic

Kellie...

is a country gal, short, middle age, empty nester in the sunset & relaxation stage of life and biz

- Is a Googler
- Uses a streamlined tech stack
- Builds out Zaps that are few steps and stages to accomplish single or few outcomes
- Is a social Zaper

We use Zapier for entirely different reasons

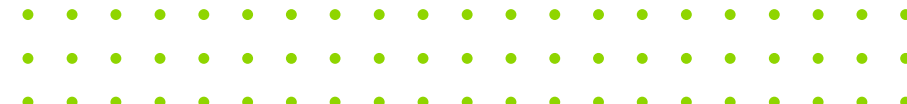
**Our Zaps are completely different, but we both love it
and don't know what we would do without it**

Be unique!

- This is a session on using Zaps and online programs in general to match your style and approach to business
- And how it relates to using all your apps in unison with your style, not just because other people "love/loathe" them



Zapier will make you happier



FROM

Without Zapier

Copy/Paste

Download CSV - Map - Upload
...map again

Mistakes and data not matching
in applications

Undertaking mundane tasks that
could be automated

TO

With Zapier

Automagical sharing of information

Exact duplication of information

You know - to having them done for you

**Native integrations may be enabled.
Check on those before willy nilly creating Zaps!**

Getting Ready to use Zapier



Getting ready to use Zapier

Analyze

Educate yourself

Stop overthinking!

Your processes

- Flowchart or handwritten

Your app stack

- What's it taking to run your business, which ones natively integrate well

Your mundane chores

- What are the ones that you should/could/would like to have someone/thing else do

Pick 2 apps and see what the triggers and actions are

Tips & advice at the top

Read the help section at the bottom

Watch [The Wateringhole videos](#)

Just do one Zap

Getting Started Using Zapier



Getting started using Zapier

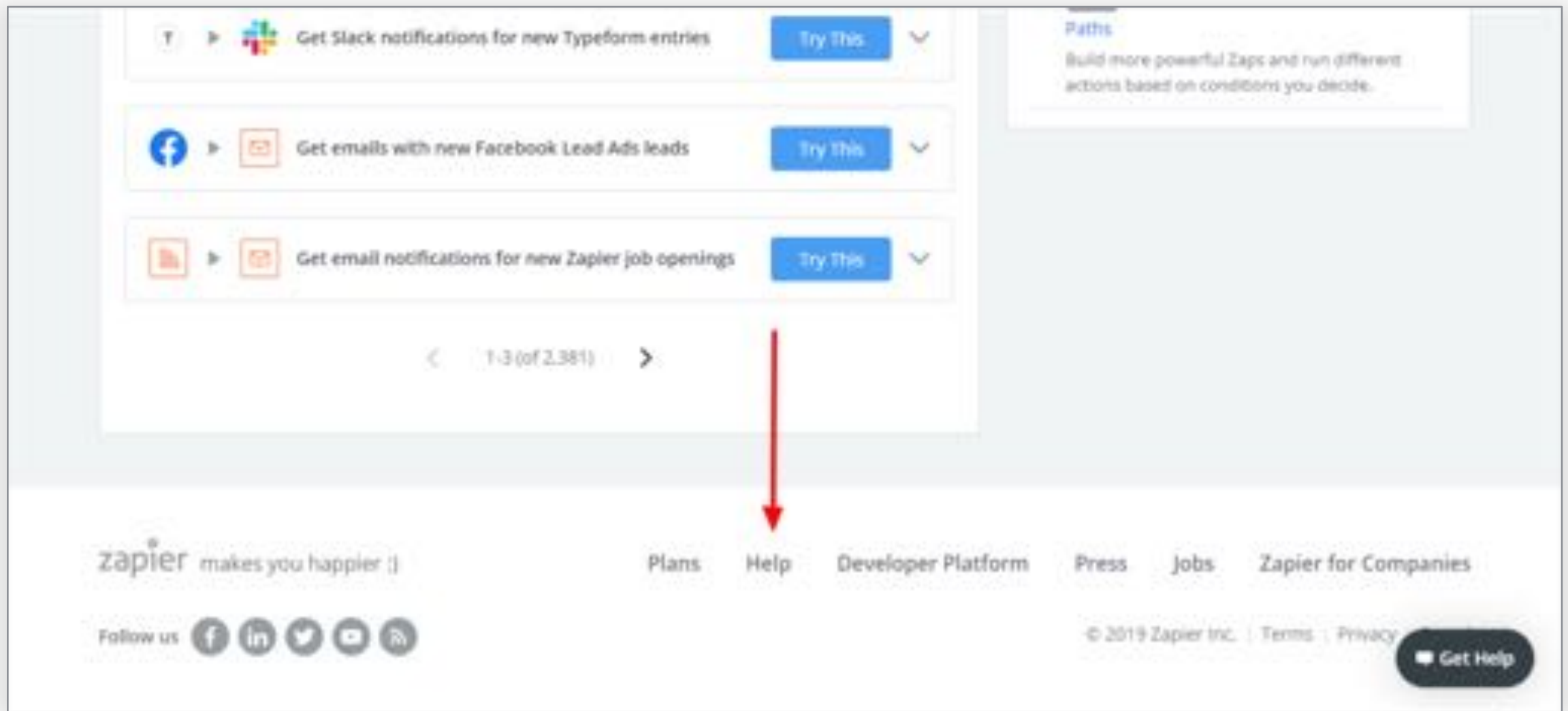
Important terms:

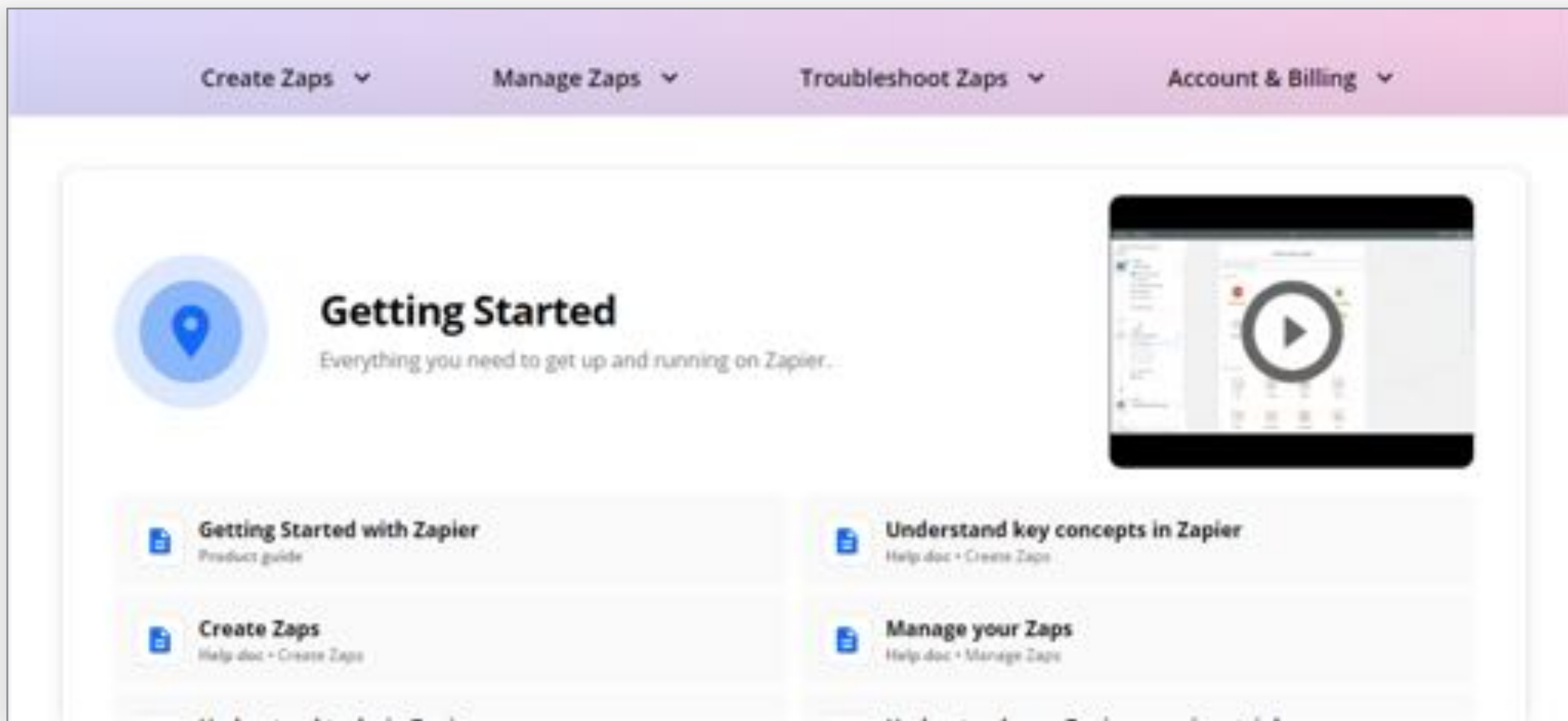
Triggers - Actions - Zap - Zap Editor - App, Sample data - Syncing internal - Task - Task History - Autoreplay - Premium App - Filter - Paths - Multi-step Zap 🤖

- Help (at bottom) > Getting Started > Understand key concepts in Zapier
- Click Apps (at the top) to find apps you use and see the Triggers, Actions, and Searches 🙌

Getting started using Zapier

Use the Zapier Help section!
It's a GOLD MINE of information
to help get you started to
#zapdomination





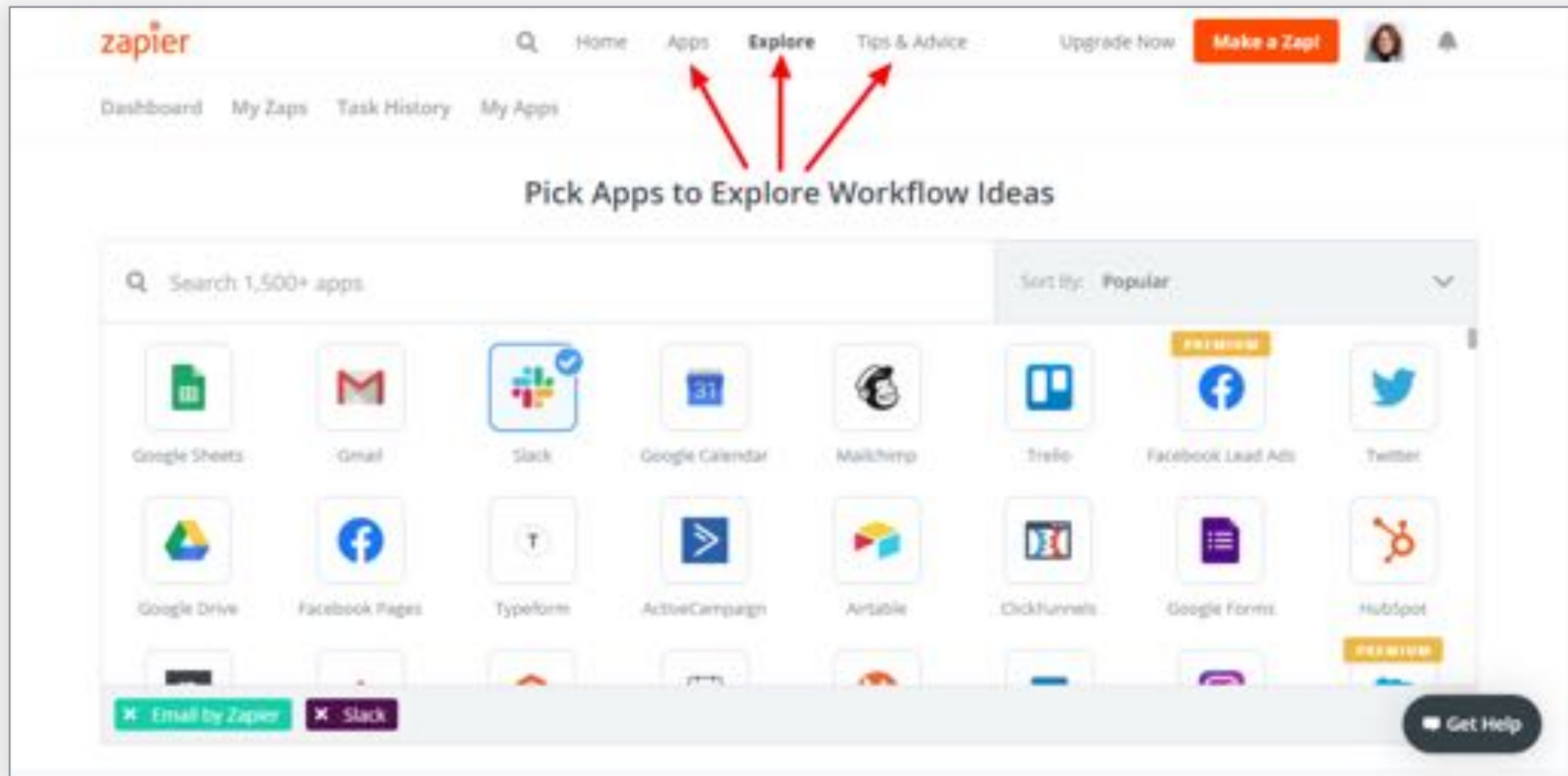
Getting started using Zapier

Click Explore (at the top) and choose some apps to see Popular Zaps

Click Tips & Advice (at the top) to see guides and blog posts

Make a simple one-step Zap by clicking Make a Zap!

Just do one thing!



Sample Zaps

- Client Accounting Zaps
- Onboarding Zaps
- Lead & Marketing Zaps
- Grunt Work Zaps



A word to the wise...

**Check if there
are native
integrations**

**Be very careful
with native
integrations -
they don't
always work**

**Zapier can help
with that**

Client Accounting Zaps

Notifications

To invoice a customer

To prepare something

To review a document

To update something in QBO

Preparing data

Send info to a spreadsheet

Delete info from a
spreadsheet

Client work

Intercompany transfers

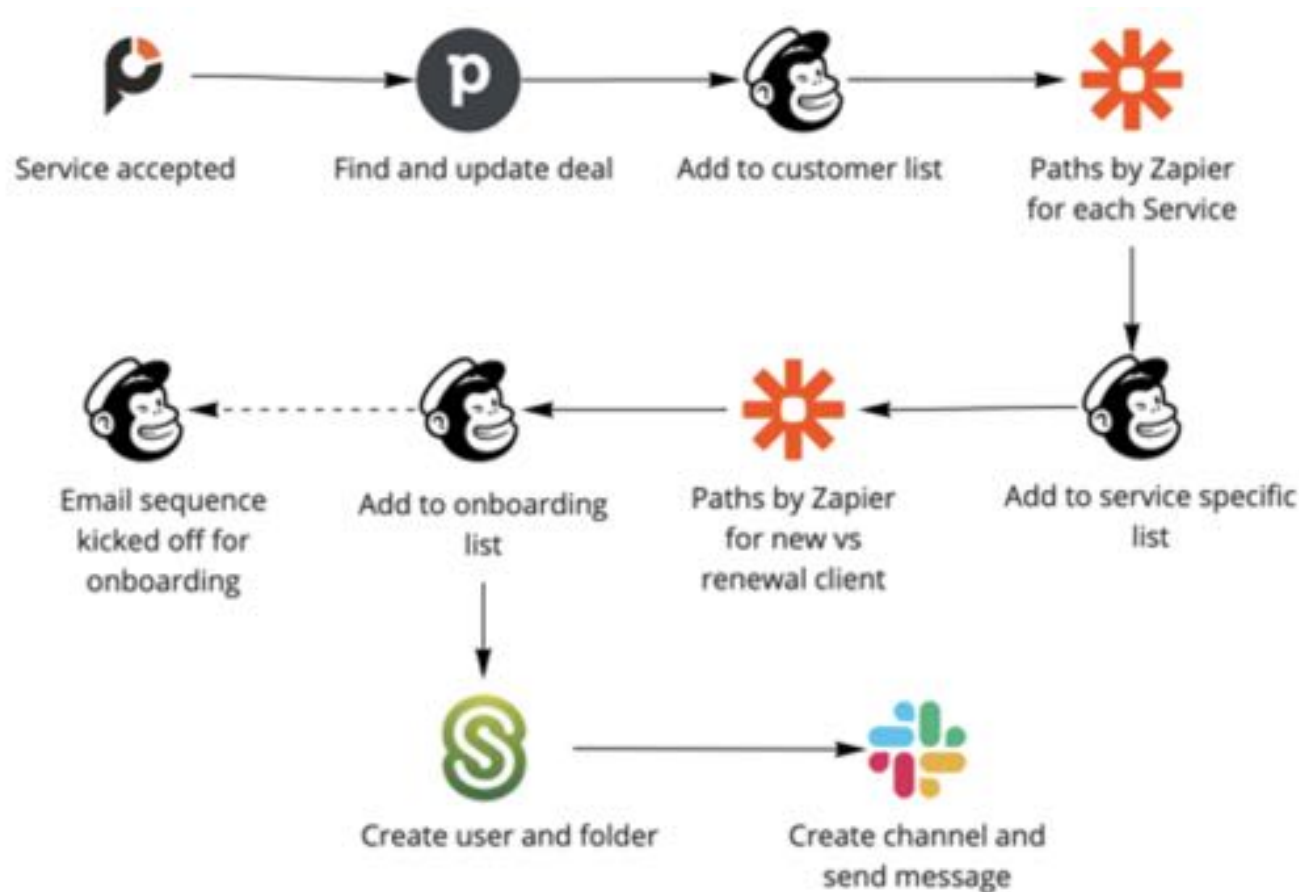
Billable expense invoices

Syncing customer data
between systems

Transferring amounts
between accounts

Creating invoices from
other systems

Onboarding Zaps

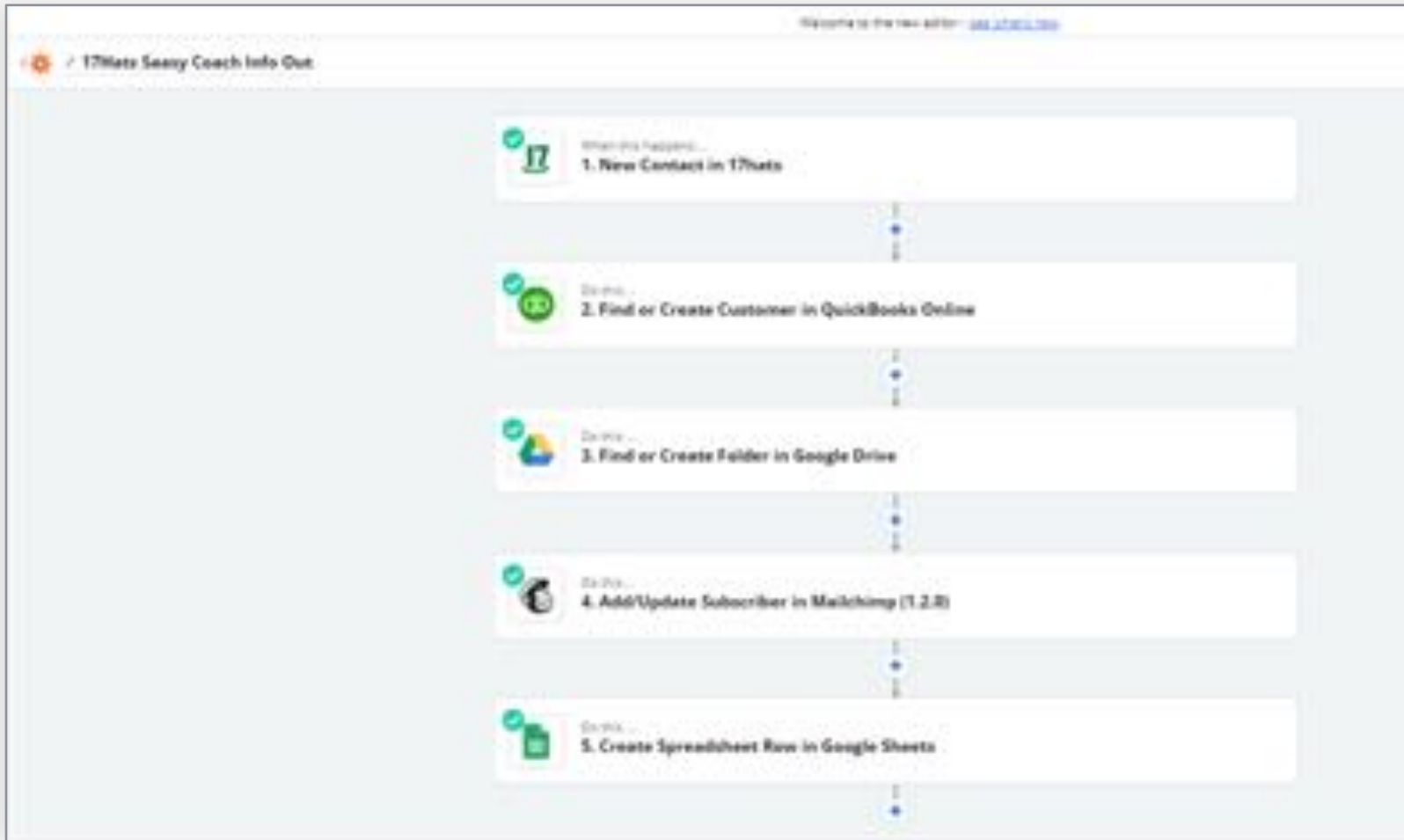


10 apps: Practice Ignition, Airtable, Pipedrive, MailChimp, Paths by Zapier, Delay by Zapier, Formatter by Zapier, ShareFile, Slack, Teamwork

Previously 5 separate Zaps
4 months to iterate on
STILL iterating on!

Be patient when building your zaps!

Onboarding Zaps



17Hats or Acuity
QBO - Contact
Created/updated -
GDrive folder created
- Mailchimp contact
created/updated -
Add to GSheet

Lead and Marketing Zaps

Deal management

Create a deal in your CRM

Email from completed survey

Information sharing

Share new blogs on social

Share new blogs with clients

Information gathering

Bot conversations added to deals

Auto-email for meeting creation

Grunt Work Zaps

Slack message with monthly NPS/CSAT scores

Request receipts to be submitted on a monthly basis

Ask client to book quarterly update meeting

Notify you in Slack when a new event is booked on your calendar

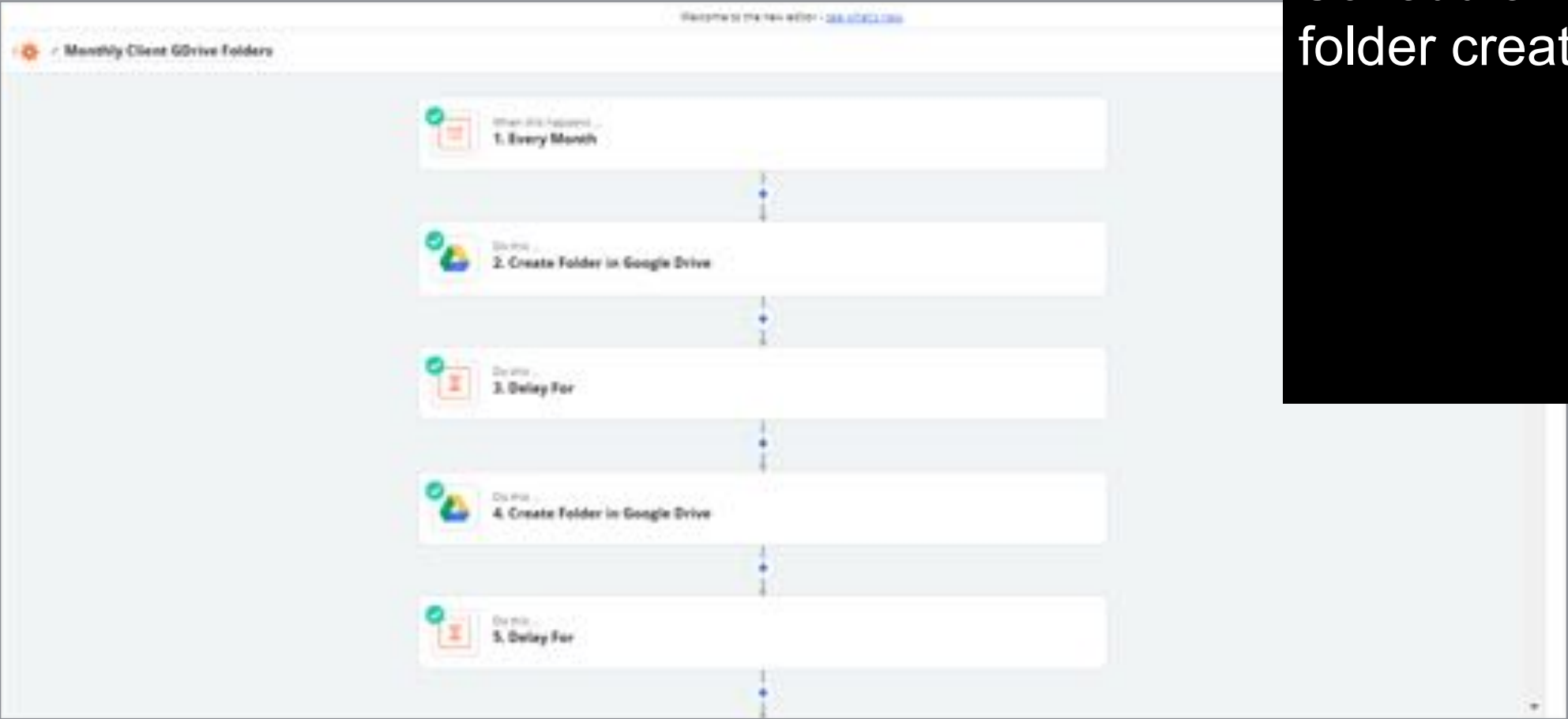
Send new invoices to spreadsheet to manage payroll bonuses

Send metrics to spreadsheet to manage KPIs

Automate your hiring process!

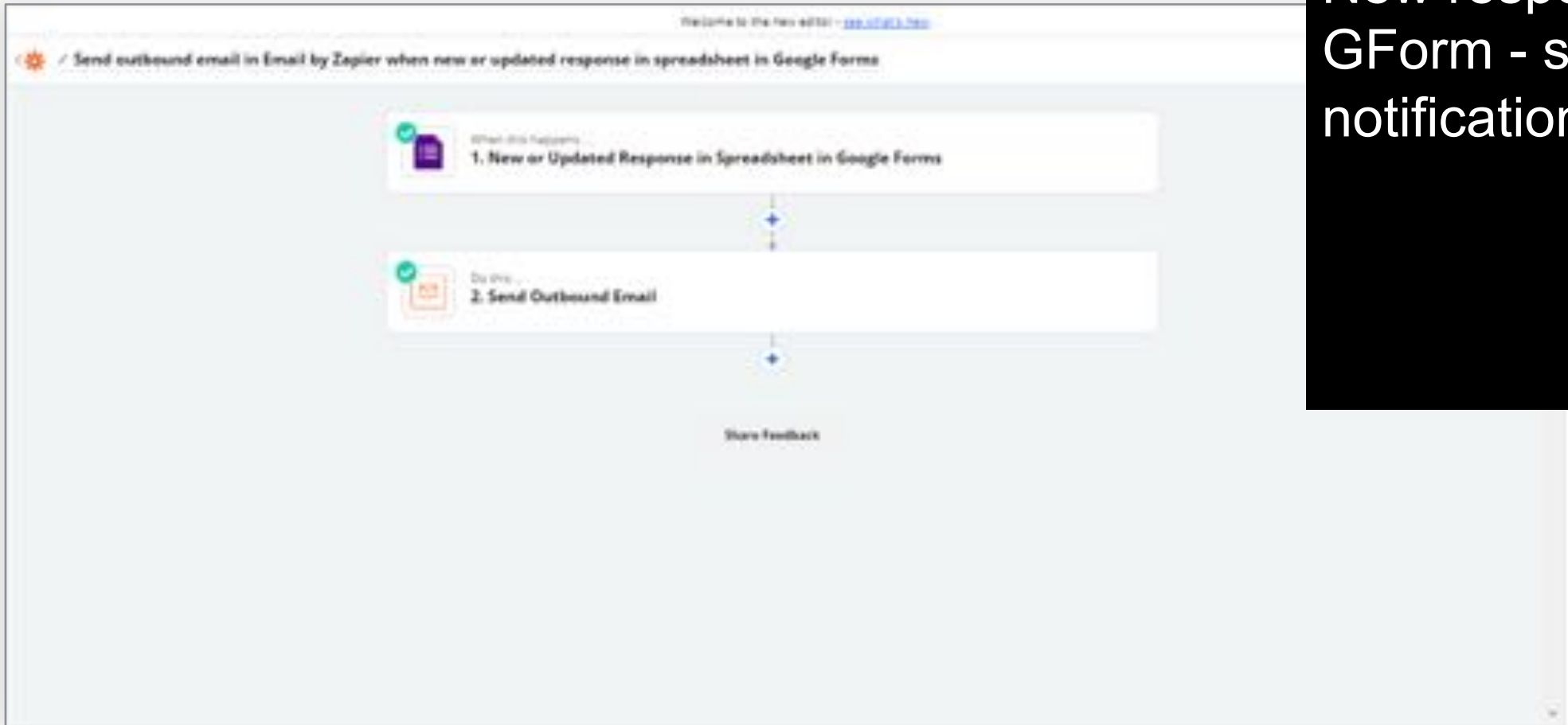
Grunt Work Zaps

Scheduler - GDrive
folder created



Grunt Work Zaps

New response in
GForm - send email
notification





Zapier will make you happier



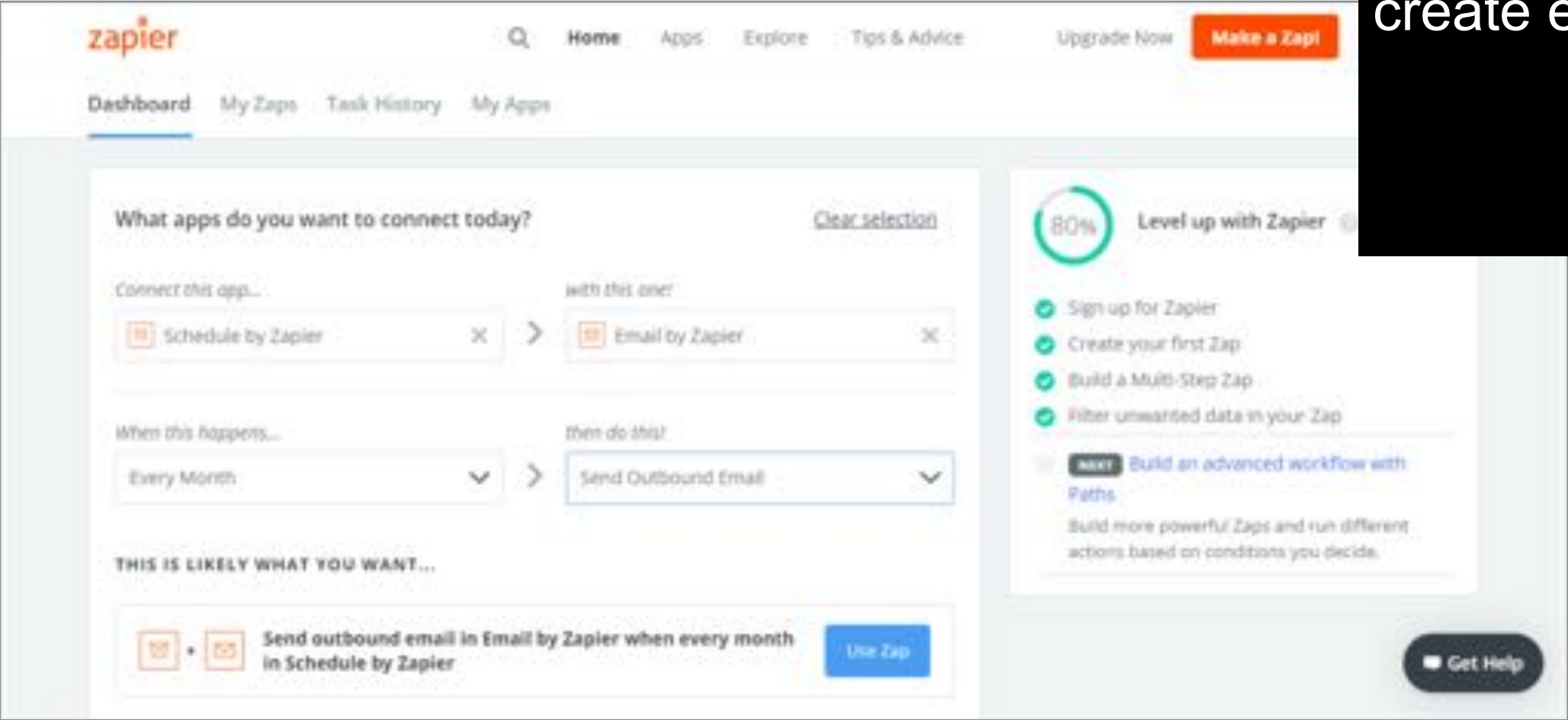
How about some automagical, nagging communications!?

- Scheduler
- Email



Grunt Work Zaps

Scheduler -
create email

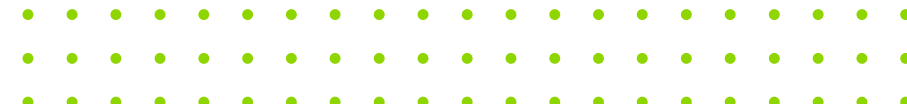




Questions?



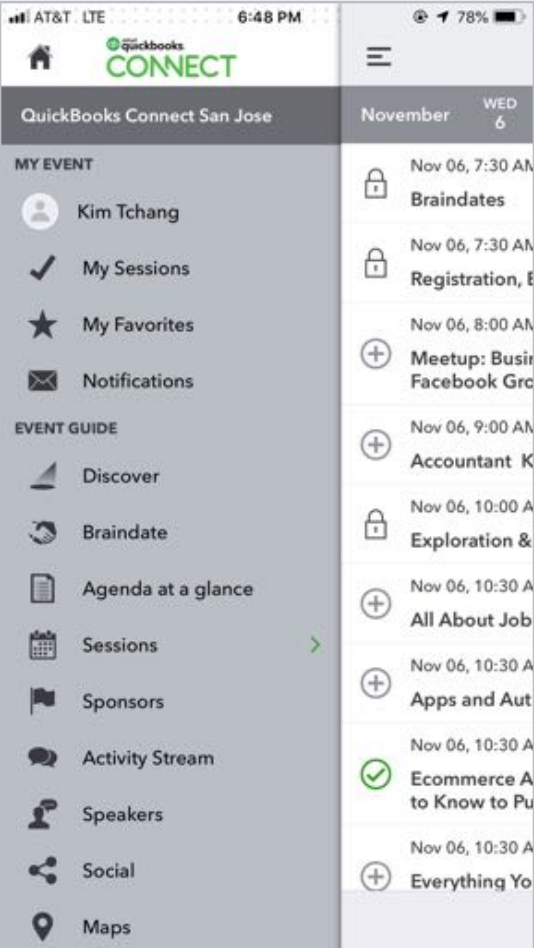
Stop overthinking! Just do one Zap!



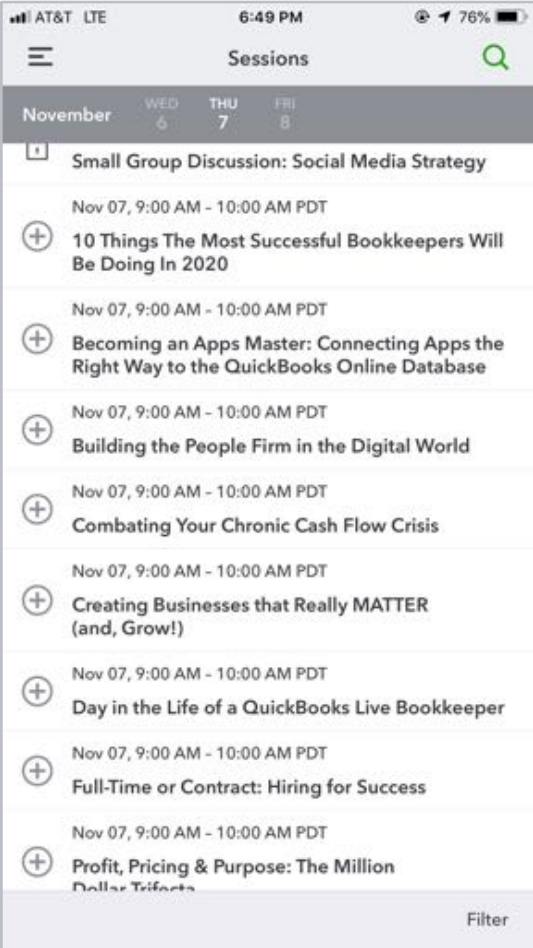
Rate this Session on the QuickBooks Connect Mobile App

Provide feedback to help us design content for future events

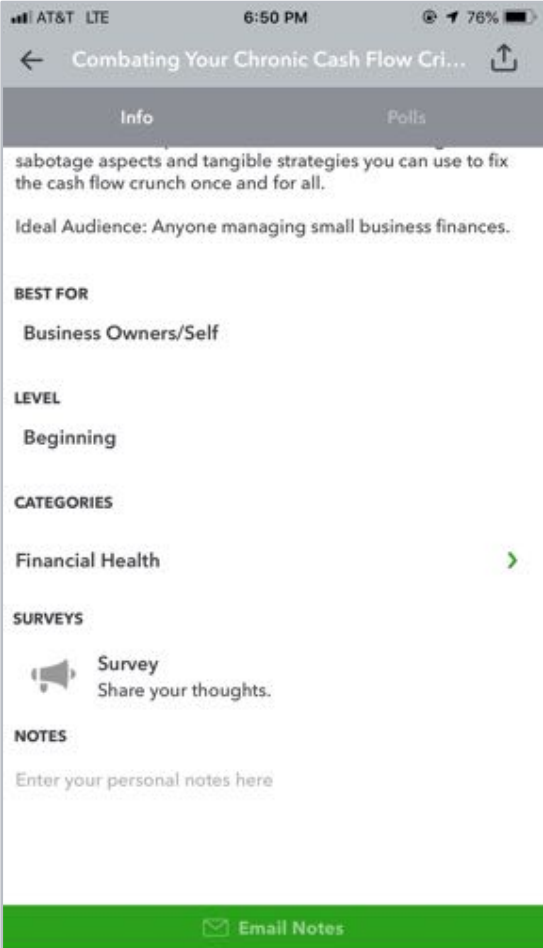
1. Select Sessions



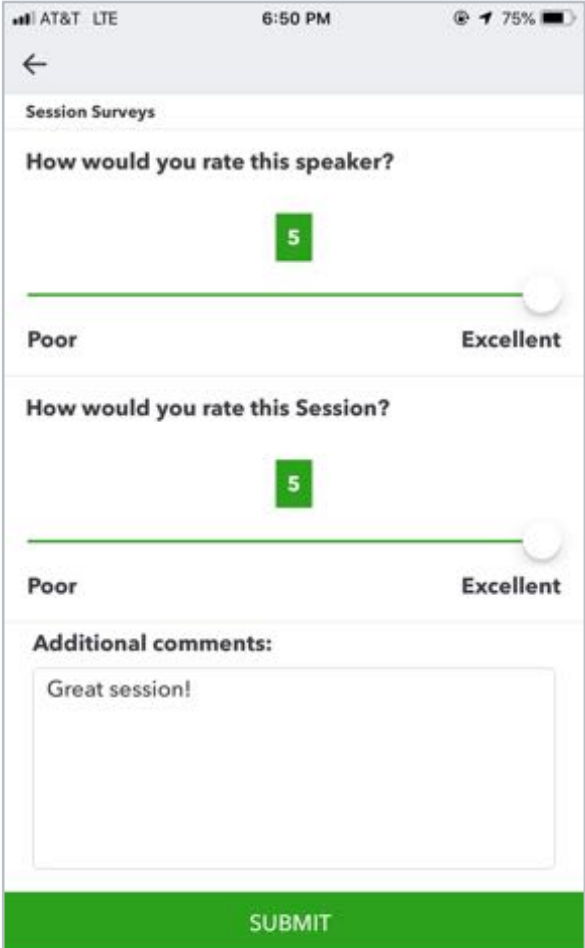
2. Select Session Title



3. Select Survey



3. Add Ratings



Material Download

1. Find the session on the agenda
2. Select + for more information
3. Download PDF of slides and/or supplemental material

<https://can.quickbooksconnect.com/agenda/>

The screenshot shows the QuickBooks Connect Canada 2023 agenda page. At the top, there's a navigation bar with links: Why Attend, Agenda (selected), Speakers, Pricing, Sponsors, Travel, and FAQ. Below this, there are tabs for the dates: December 9 (Accountant Day), December 10 (selected), and December 11. A 'Print Agenda' link is on the right. A paragraph describes the breakout sessions. Below that is a search bar labeled 'Search for sessions'. A 'Filters' section includes buttons for Organizational Culture, Life & Business Skills, Technology Training, Business Growth, Advisory, and Financial Health, with an 'Expand all +' link. The main agenda list shows sessions from 7:30-9:00 am to 11:00 am-12:00 pm. The 'Breakout Sessions' section is expanded, showing details for 'Creating Your Small Business Culture', including a description, ideal audience, best for, speakers, location, track, CPD hours, and level. Other sessions listed are 'Understanding Personalities for Better Communication' and 'How to Use QuickBooks for Your Small Business: Introduction'.

QuickBooks CONNECT

Why Attend Agenda Speakers Pricing Sponsors Travel FAQ

December 9 Accountant Day December 10 December 11 Print Agenda

Attend breakout sessions to learn strategies to grow your business, how to hire and build an ideal culture, tips to improve your financial health and more. Connect with peers and experts for one-on-one learning. More information coming soon.

Search for sessions

Filters: Organizational Culture Life & Business Skills Technology Training Business Growth Advisory Financial Health Expand all +

7:30-9:00 am Registration, Breakfast & Exploration +

8:00-8:45 am Meetup: New to Networking +

9:00-10:00 am Morning Keynote +

10:00-11:00 am Exploration & Connection +

10:15-11:00 am Meetup: Women in the Workforce +

11:00 am-12:00 pm Breakout Sessions

Creating Your Small Business Culture +

Many solopreneurs and small business owners feel like they don't have time to work on their company culture (or that they even should). Instead, they spend most of their days working in their business rather than "on" their business. In this session, you will receive tips on how to reduce stress, improve productivity, and improve your personal fulfillment all through the nurturing of your crew, your clients, your fans, AND yourself!

Ideal Audience: Business owners looking to enhance their culture.

Best For: Business Owners/Self-Employed

Speakers: Tamia Madenitz

Location: Room 201 CDEF

Track: Organizational Culture

CPD Hours: 1

Level: Introduction

Understanding Personalities for Better Communication +

How to Use QuickBooks for Your Small Business: Introduction +



OWN
THE
FUTURE