



10 essential Zapier automations to build in your accounting firm

karbonhq.com



Learning objectives

- ✓ What you should know before building and implementing your bookkeeping processes.
- ✓ The critical steps, and what to cover: document collection, client management, prep, processing, and reconciliation.
- ✓ Examples of Receipt Bank to Karbon workflows.
- ✓ Solutions to common pitfalls.



Meet your hosts



Heather Satterley

Satterley Training & Consulting
Founder & Owner



Ian Vacin

Karbon
Chief Customer Officer



Heather Satterley

- Owner/Founder of Satterley Training & Consulting
- Co-host of The Appy Hour with Liz and Heather
- Owner/Founder of Satterley Business Solutions
- Advanced Certified QuickBooks ProAdvisor & Zapier Expert

Satterley Training & Consulting

- Learn more: satterleyconsulting.com
- Email at: heather@satterleyconsulting.com

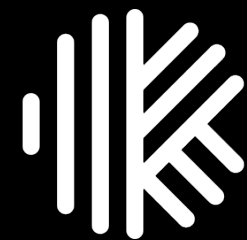




Presented by
Heather Satterley

Learn to Automate! Take a Zapier Workshop

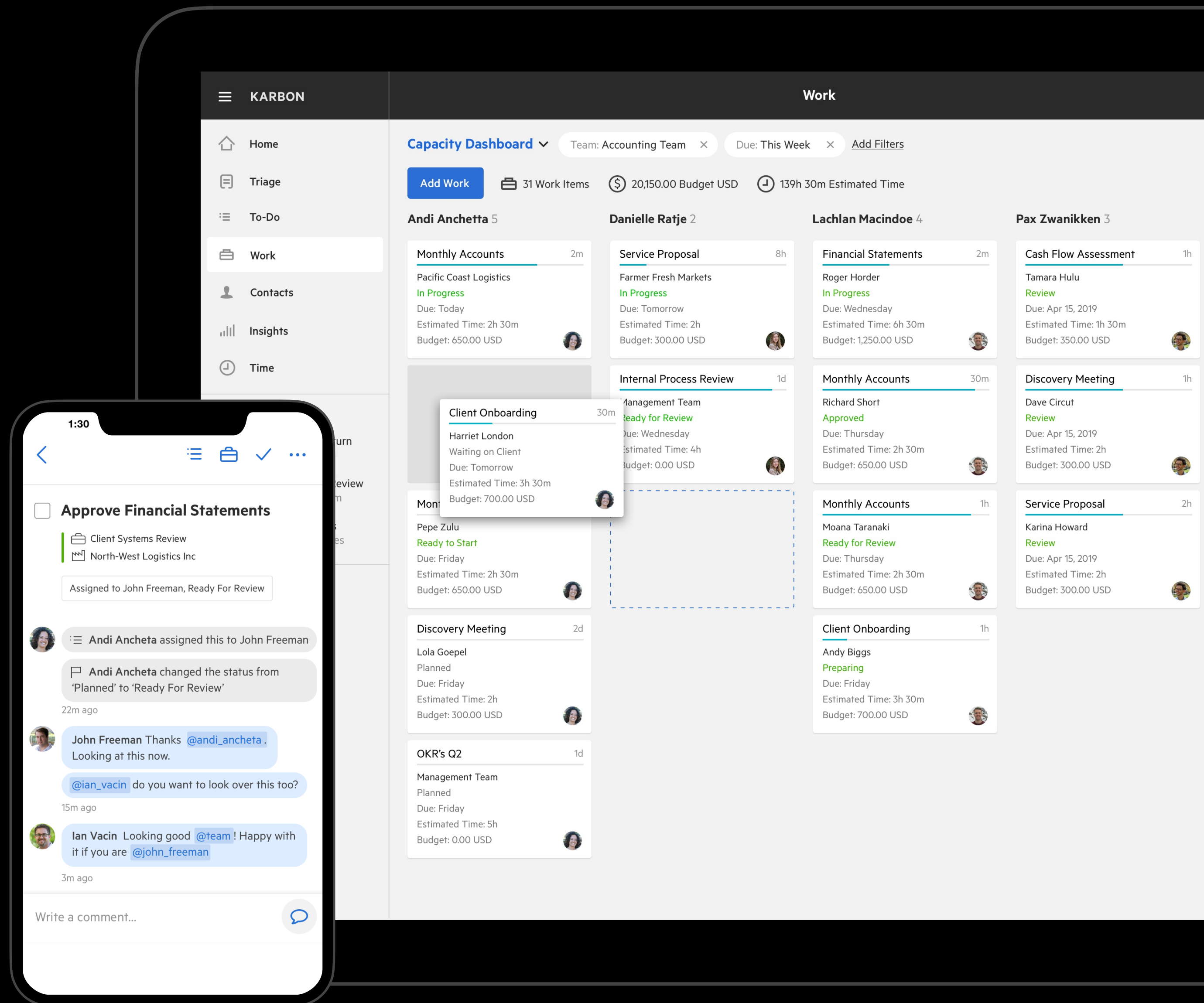
<http://bit.ly/STCZapierWorkshop>



Work Management Software *for* Accounting Firms

karbonhq.com

GET STARTED



- 1. Close any open apps**
- 2. Ask and we'll answer**



- 1. Introduction**
- 2. What & how of Zapier**
- 3. How to examples**
- 4. Tips & tricks**
- 5. Wrap up**



Technology stack defined (Envolta)

- **Email & Apps:** Gmail
- **Practice Management:** Karbon
- **CRM:** Pipedrive
- **Document Management:** Hubdoc
- **Accounting:** Intuit QuickBooks Online
- **Payroll:** WagePoint
- **Tax:** Intuit ProFile / ProTax
- **Advisory:** Fathom & Spotlight
- **Pricing & Proposal:** Practice Ignition
- **Time tracking:** Intuit TSheets
- **Integration:** Zapier
- **Other:** Slack, Zoom, Calendly, Plooto

 Suite

 KARBON

 pipedrive™

 intuit
quickbooks.

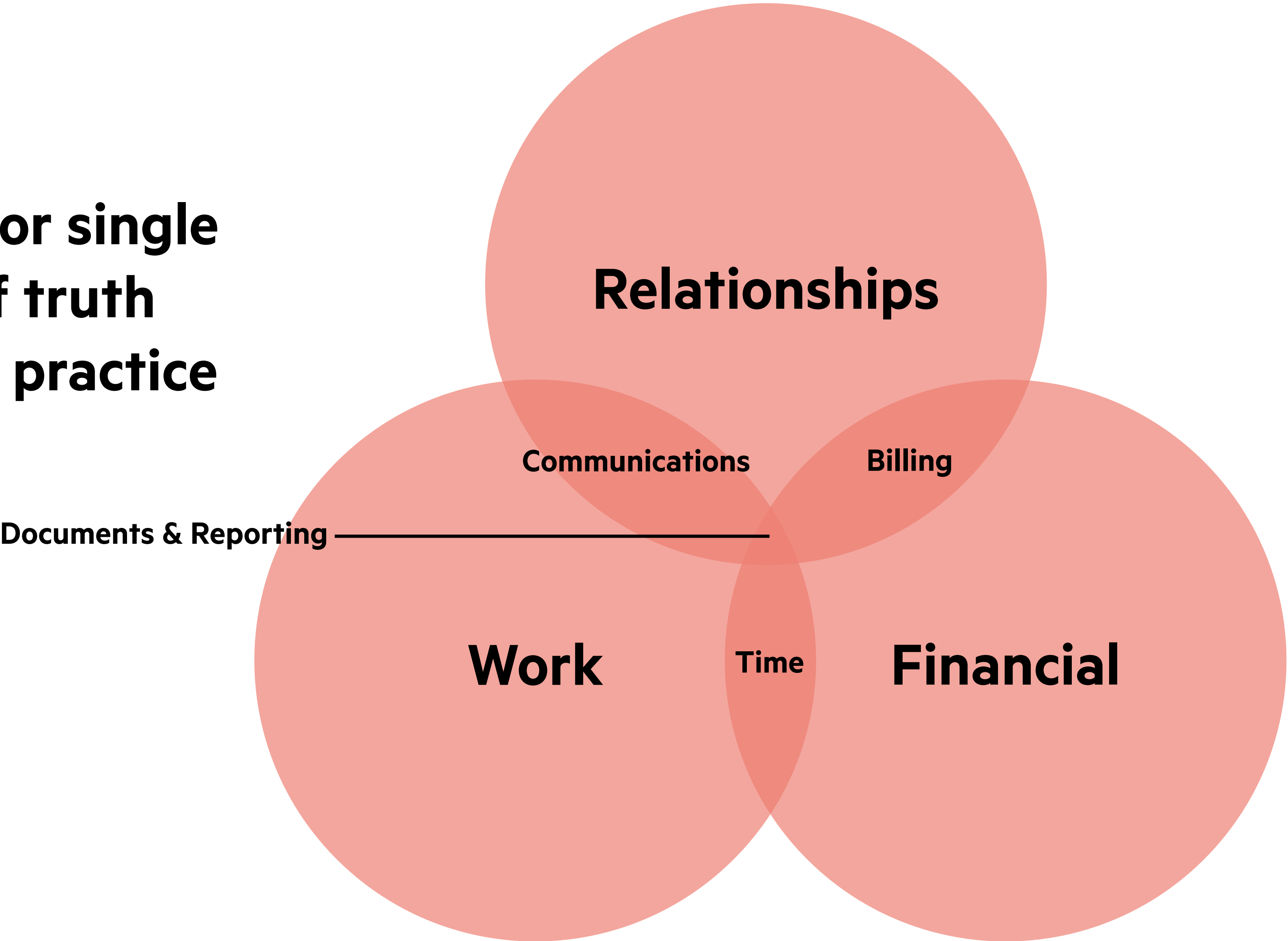
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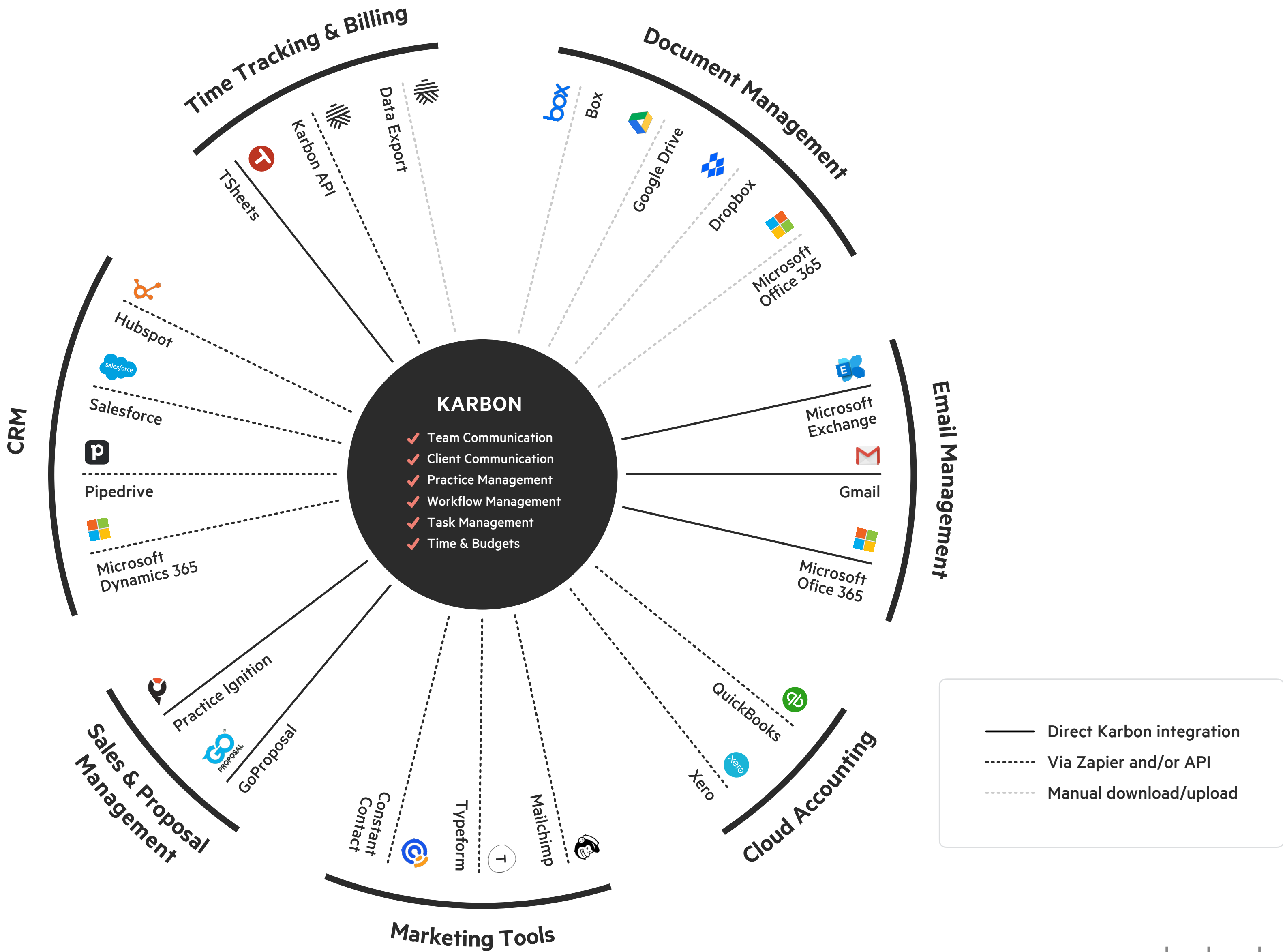
 PRACTICE Ignition

 TSHEETS
by quickbooks

**Designing for single
source(s) of truth
within your practice**



How to build your tech stack around Karbon



What are the ways to connect?

Direct integration	Zapier integration	Karbon API
<p>IN APP</p> <p>Karbon integrates directly with an ever-increasing suite of apps.</p> <p>↓</p> <p>LEARN MORE</p> <p>karbonhq.com/integrated-ecosystem</p>	<p>IN APP</p> <p>Connect Karbon to Zapier and build your zaps to connect to other apps.</p> <p>↓</p> <p>LEARN MORE</p> <p>zapier.com/apps/karbon/integrations</p>	<p>DEVELOPER CENTER</p> <p>Register for an account, explore the developer docs and get support.</p> <p>↓</p> <p>LEARN MORE</p> <p>developers.karbonhq.com</p>



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Why Zapier?



“Zapier is an online automation tool that connects your favorite apps, such as Mailchimp, Slack, Karbon, and more. You can connect two or more apps to automate repetitive tasks without coding or relying on developers to build the integration.”



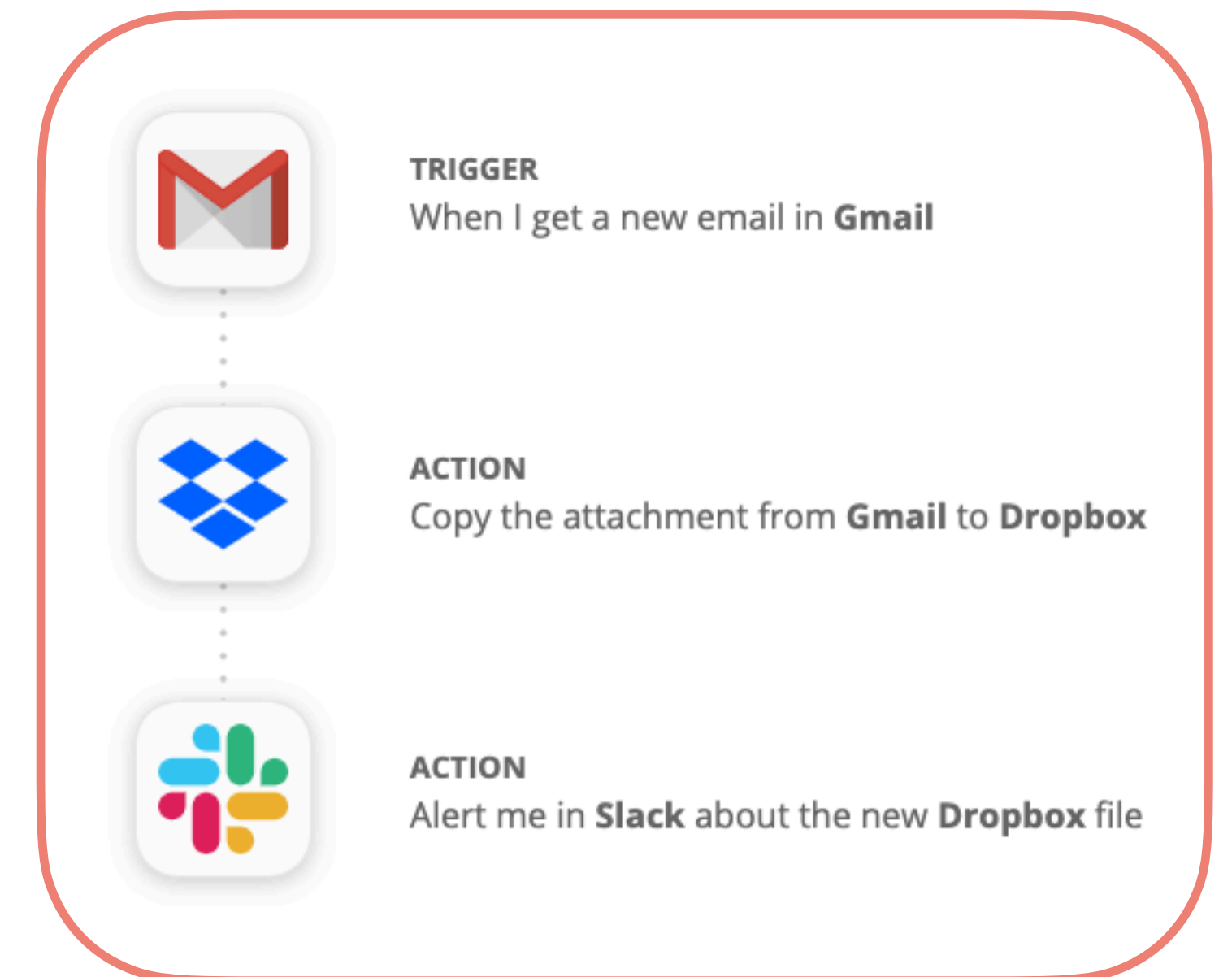
Key things to know about Zapier

- Zapier is the glue that connects 2000+ web apps.
- Zaps are workflows that connect your apps, so they can work together.
- Zaps start with a trigger—an event in one of your apps that kicks off your workflow and ends with an action.
- Zaps automate tasks in the background, so you can focus on more important work.

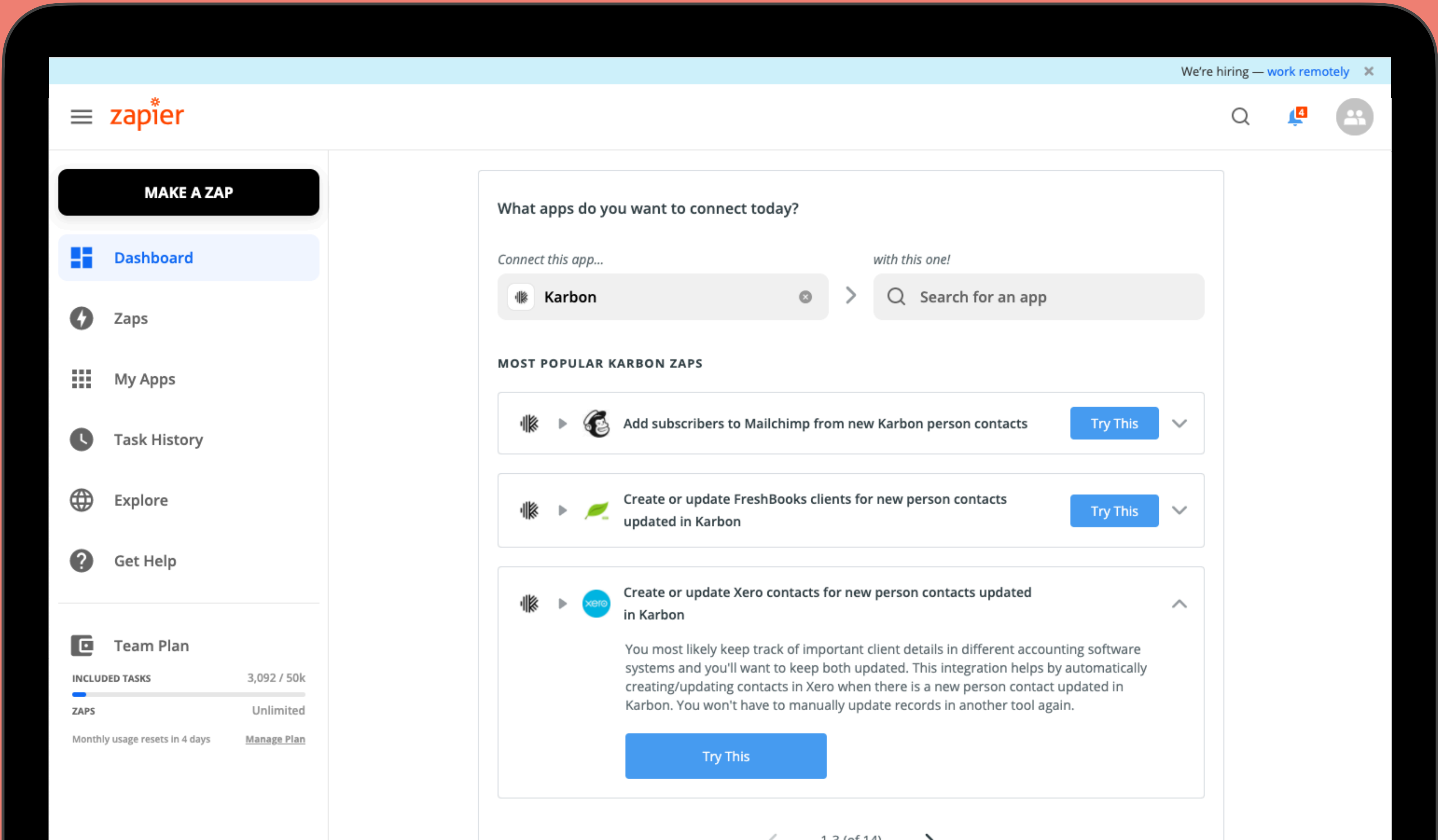


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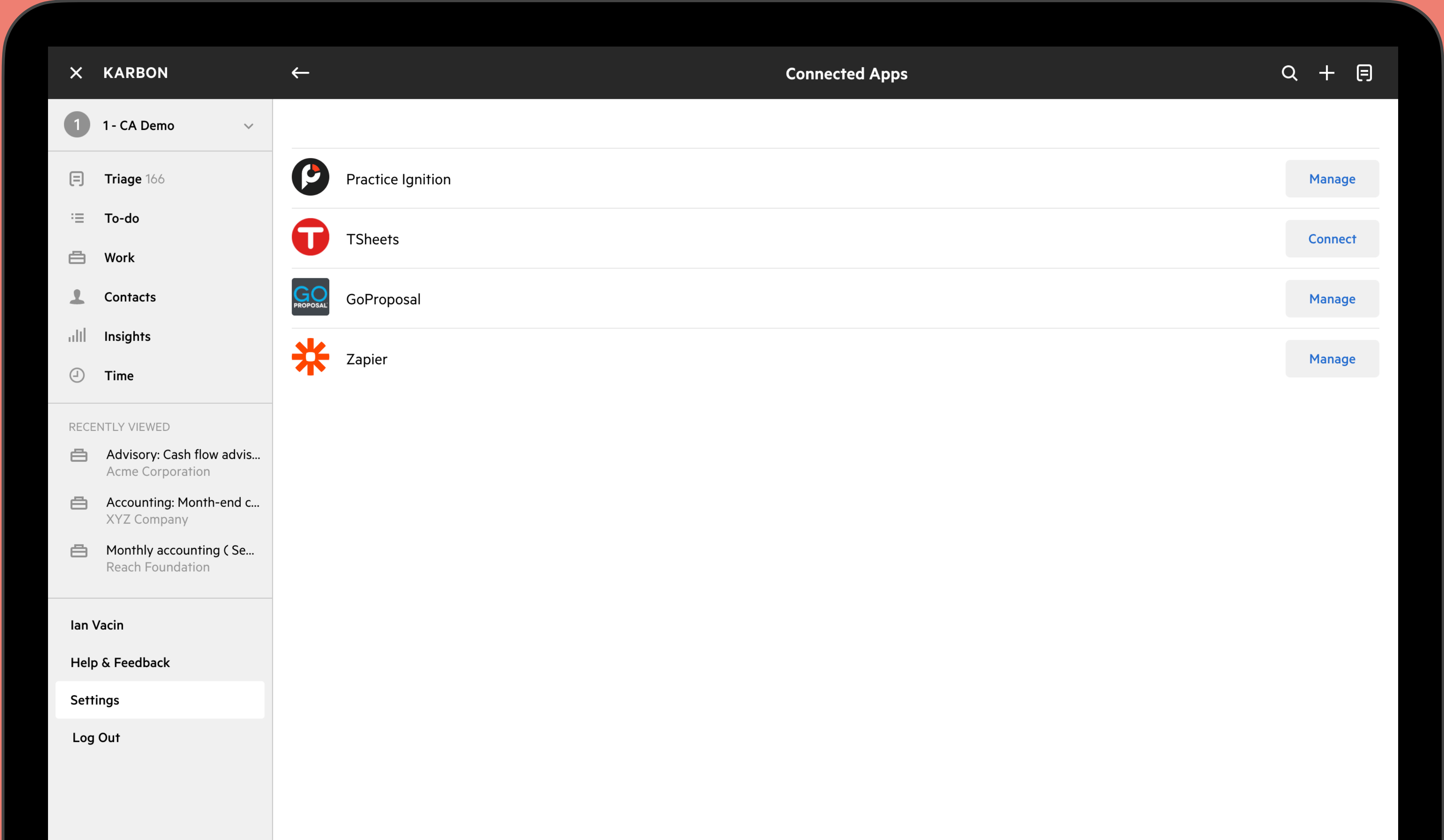
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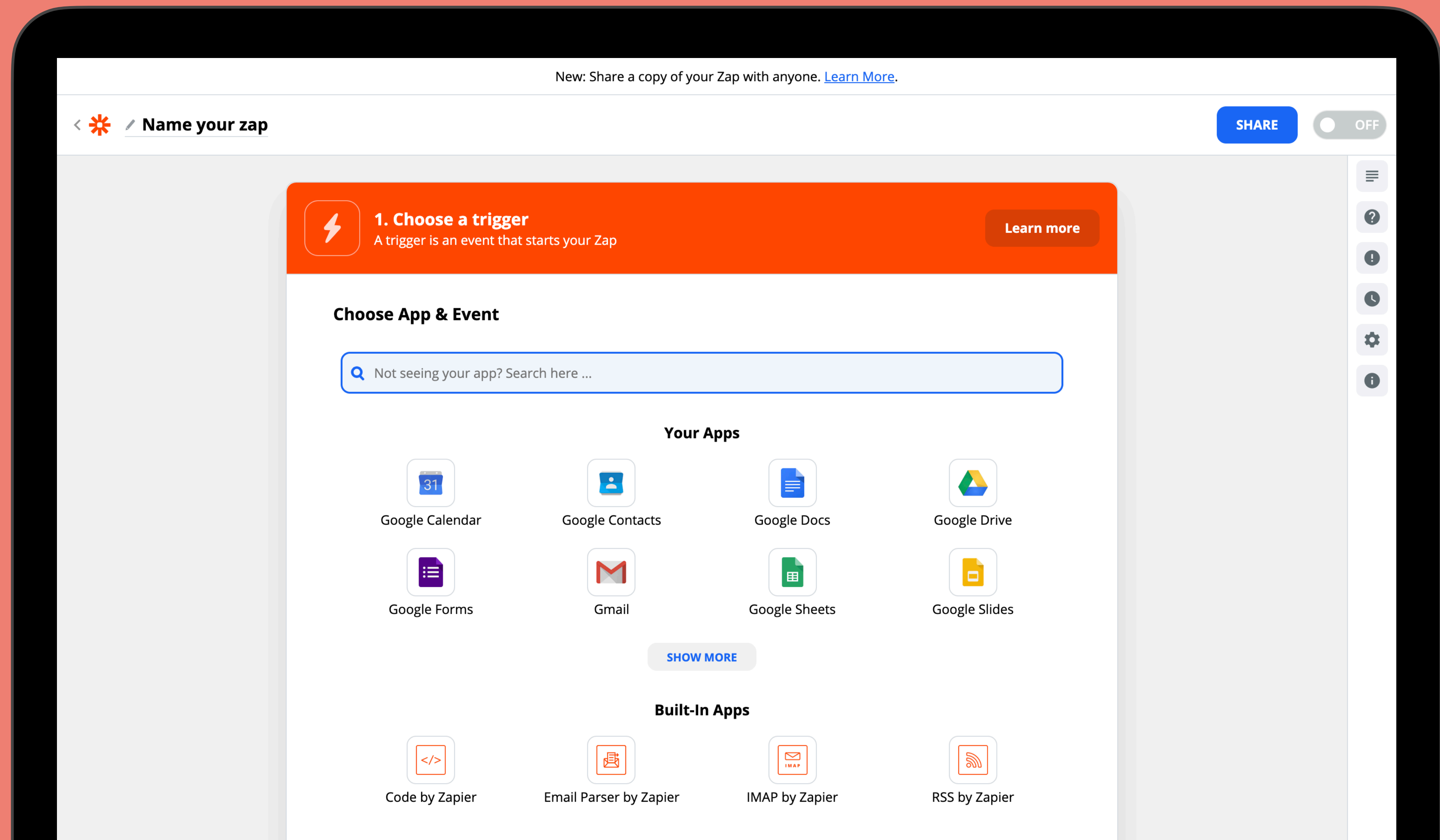
Check out the 2000+ apps Zapier has to offer. Sign up at: zapier.com/sign-up/



Simple to get connected—grab token and add to Zapier.



Click “Make a Zap” to start your first automation!



What data can you connect via Zapier & Karbon?

Person contacts:

- First name
- Last name
- Client identifier
- Contact type
- Preferred name
- Salutation
- Email address
- Address line
- City
- State/ Province/ County
- Zip code
- Country
- Phone number

Organization contacts:

- Name
- Client identifier
- Contact type
- Website
- Address line
- City
- State/ Province/ County
- Zip code
- Country
- Phone number



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Type of zaps to build

1. **Plug and play:** Add new Gmail attachments to Google Drive.
2. **Custom:**
 1. Easy: Send emails to when something happens in QBO).
 2. Medium: Client info form & update Karbon contact record.
 3. Advanced: Client onboarding with PI, Karbon, Sharefile & Mailchimp.

Top 10 Zaps to consider

- Add new Gmail attachments to Google Drive
- Send emails to when something happens in QBO
- Client info form & update Karbon contact record
- Client onboarding with PI, Karbon, Sharefile & Mailchimp
- Urgent vacation messages
- New Account in QuickBooks > Slack message
- Quarterly Tax Reminders > MailChimp
- Intercompany Allocations in Accounting System
- Post PayPal or Stripe fees to Accounting System
- Send Slack message when status page is updated

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Tips and tricks with Zapier

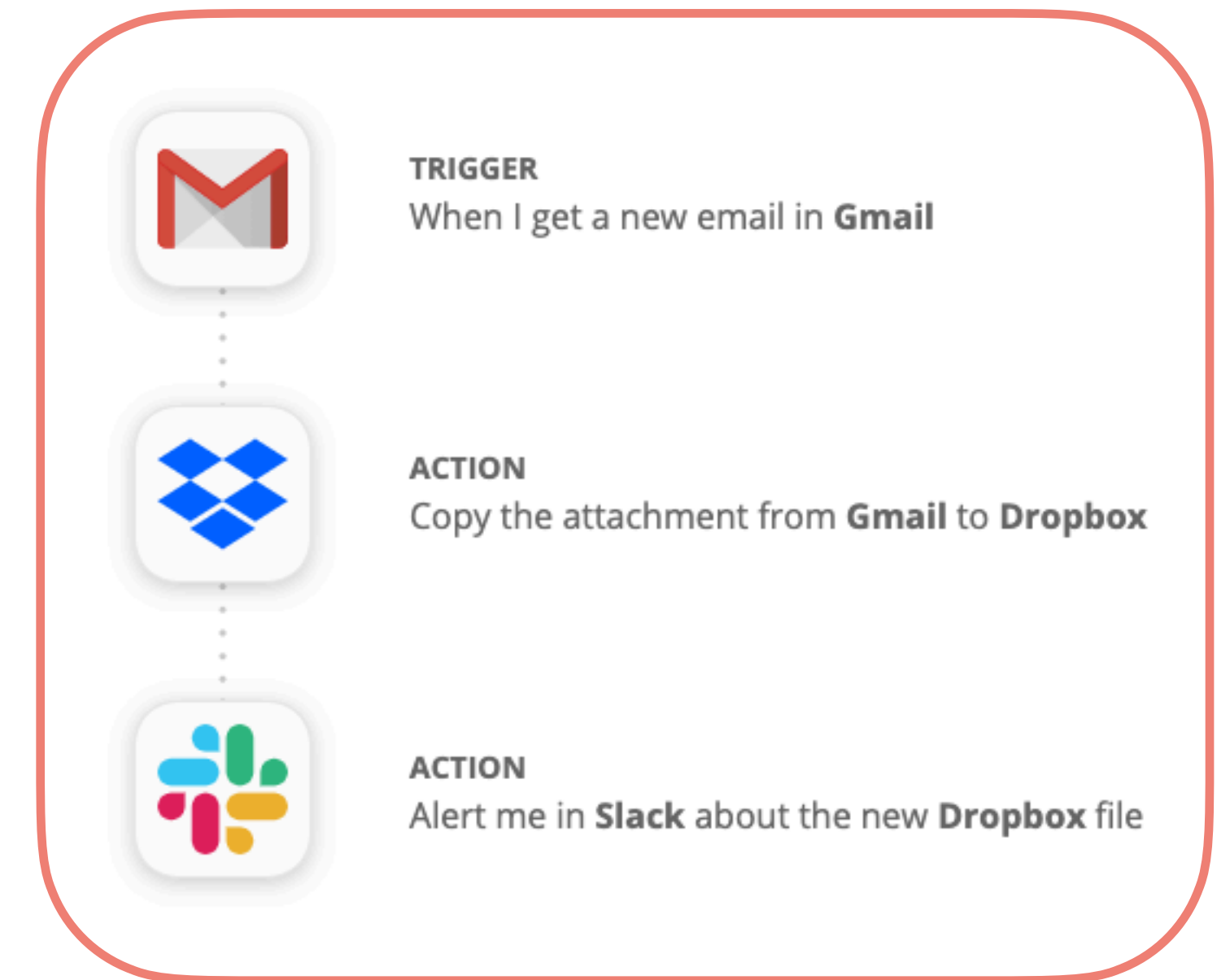
- Understand your process BEFORE you automate
- Make sure a native integration doesn't exist
- Create test accounts when building Zaps
- Start with one simple automation
- Utilize help resources
- Imagine what you want, then see if possible
- Learn from others and/or get assistance

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Your 30-day assignment

- Read the article at: <https://bit.ly/31RujzQ>
- Sign-up for a free Zapier account at: zapier.com/sign-up/
- Learn how to connect to Karbon: <https://bit.ly/3e3magp>
- Setup and use your first plug-and-play zap
- Build your own simple custom zap
- Plan your second zap to pursue



- Once done, let us know! Either email or tweet us [@KarbonHQ](#) and [@hsatterley](#)



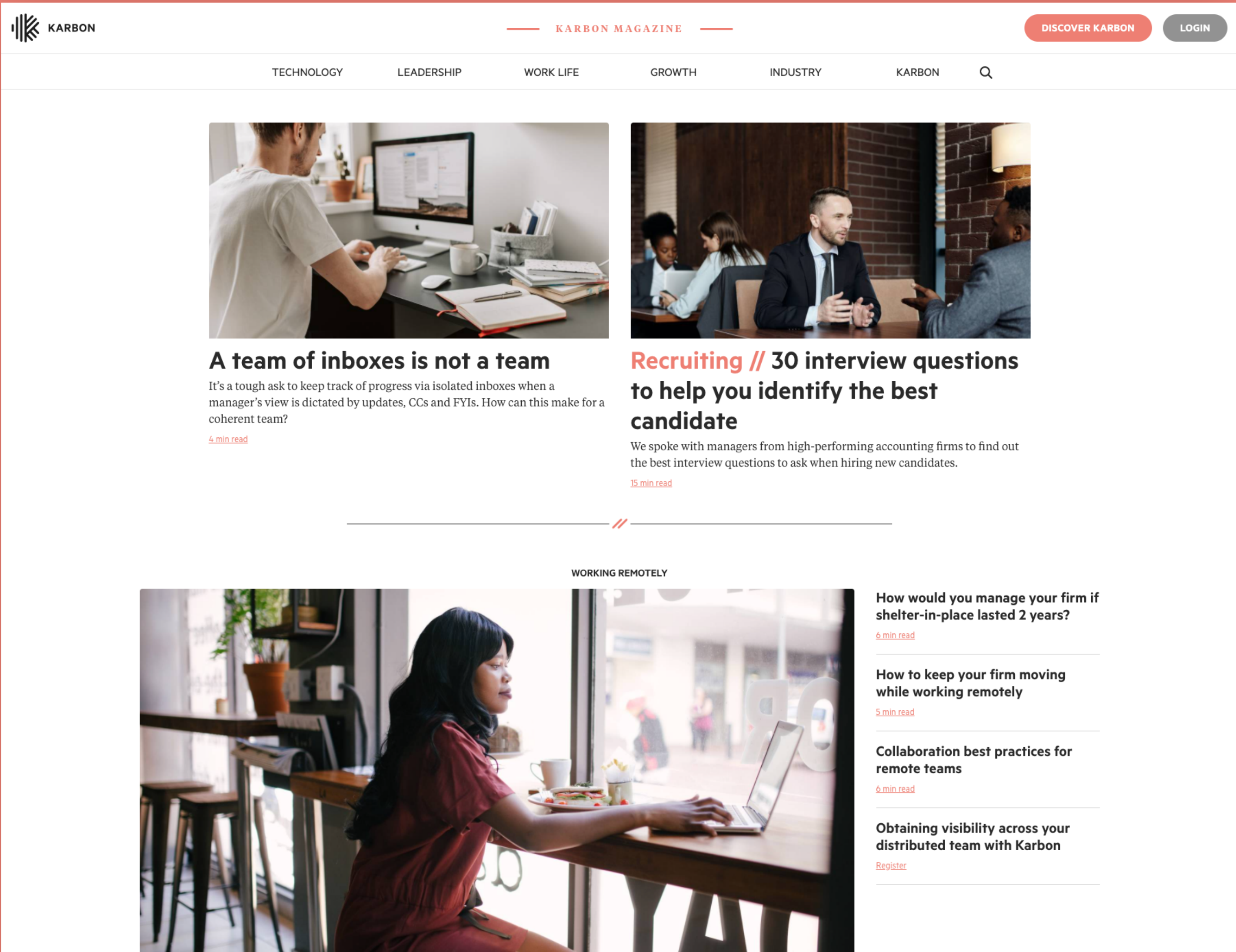


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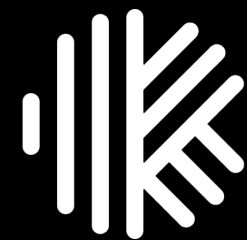
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- ✓ Templates
- ✓ Articles
- ✓ Events
- ✓ Videos
- ✓ Ebooks
- ✓ Guides
- ✓ Customer Stories

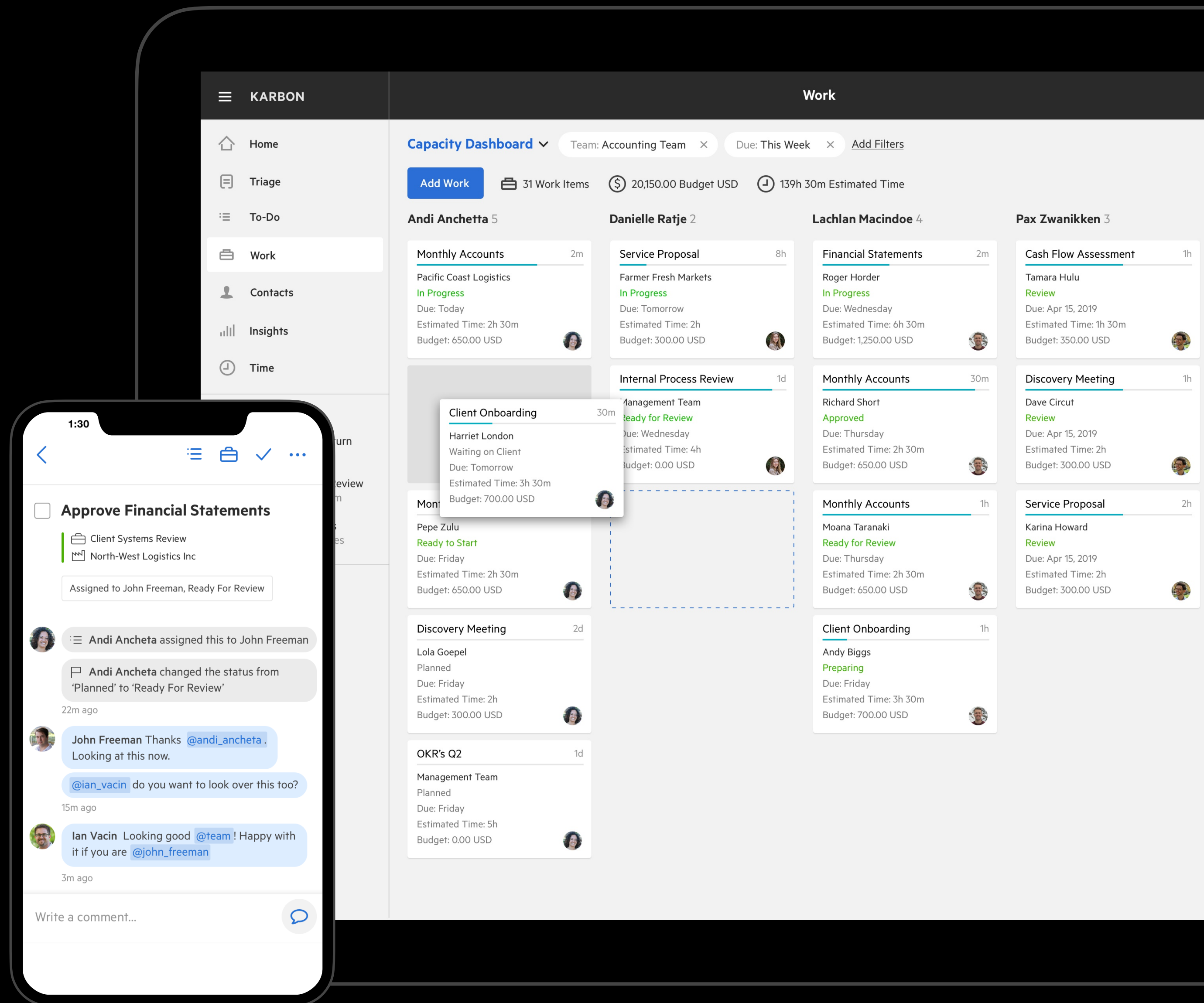




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Questions?



Thank you

Get started at karbonhq.com

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