



Next level automation with Zapier

Matthew Kanas and Brian Clare

A photograph of two young women with long blonde hair, one in profile and one from behind, talking at night. They are wearing dark jackets with fur-lined hoods. The background is dark with some blurred lights.

**Take a few moments
to **CONNECT** with
your neighbour**

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 hours 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

Agenda

Intro of Matt and Brian

Shop Talk: Matt and Brian

Zapier demo

- Getting started with Zapier
- Easy Zaps users can use
- Zaps Blueprint uses

Q&A from audience

Today's speakers



Matthew Kanas

Development Partnerships Leader, Intuit Canada

@mckanas



Brian Clare

Partner, Blueprint Accounting

@blueprintbrian

Shop Talk: Matt and Brian



Zapier demo

It's in your head now, isn't it?



Getting started with Zapier

Who has an email address?

Who has a Gmail address?

Go to Zapier.com

- Click Sign Up (top right, red button)
- Pick your Gmail address
- Or, enter your email address
- You just created a Zapier account... YAY!

Getting started with Zapier

Explore Zaps Task History Connected Accounts

What Do You Want to Automate Today?

Connect this app...

Search for an app

↔

with this one!

Search for an app

CLICK HERE

It only takes a few minutes to save hours (or even days) of work

Make a Zap!

A screenshot of the Zapier 'Make a Zap' interface. At the top, there are navigation links: 'Explore', 'Zaps', 'Task History', and 'Connected Accounts'. The main heading is 'What Do You Want to Automate Today?'. Below this, there are two search boxes. The first is labeled 'Connect this app...' and the second is labeled 'with this one!'. A double-headed arrow is between the two search boxes. A large red arrow points from the text 'CLICK HERE' to the first search box. Another red arrow points from 'CLICK HERE' to the second search box. A third red arrow points from 'CLICK HERE' to an orange button labeled 'Make a Zap!'. Below the search boxes, there is a green play button icon and the text 'It only takes a few minutes to save hours (or even days) of work'.

Take a step back...

Questions to ask yourself: from Practice Ignition

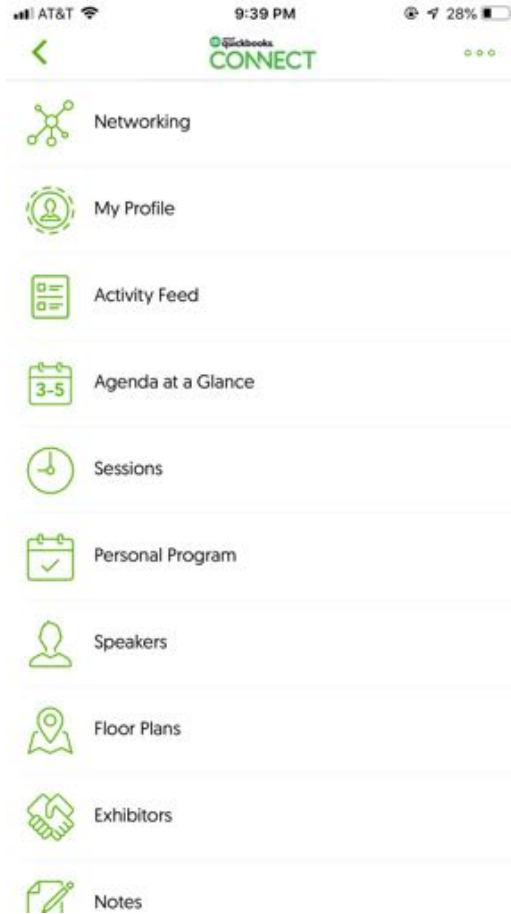
- What is the current process of the workflow I'm trying to automate?
- Which people in my organization are involved in executing this process?
- What apps can I use to do this?
- What is/are the inputs, processes or conditions, and outputs that I need?
- What challenges, workarounds or future enhancements do I need to document?

INPUT (TRIGGER)	PROCESSES OR CONDITIONS	OUTPUT (ACTIONS)

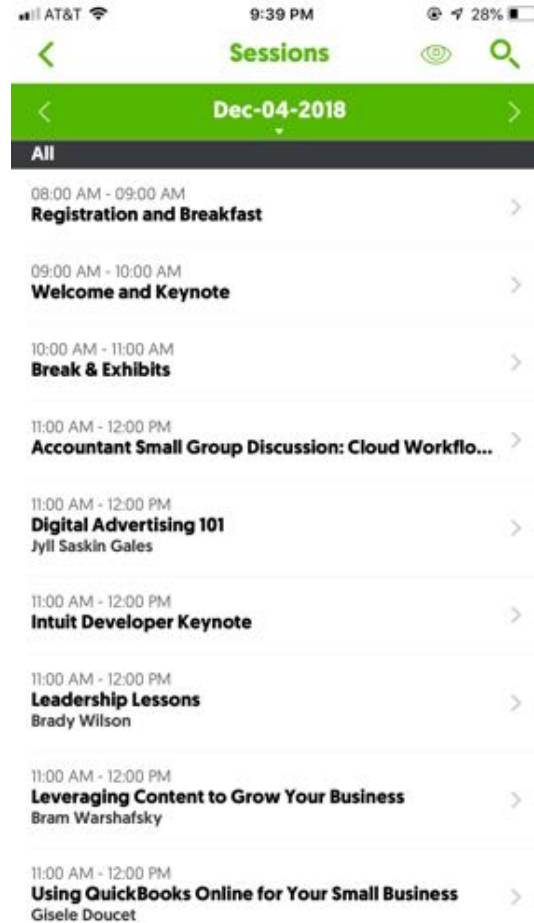
Questions?

Rate this session in the mobile app

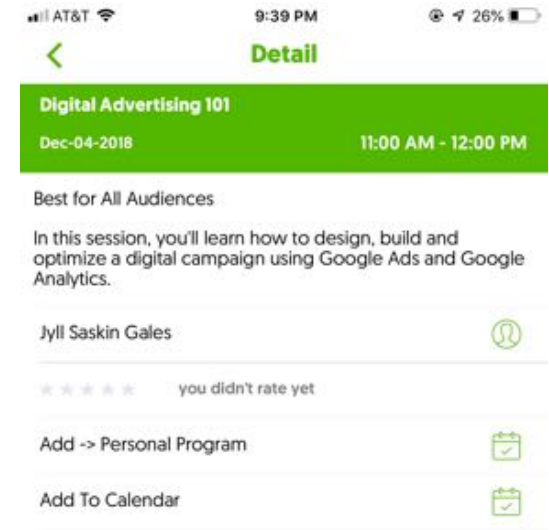
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11:00 am-12:00 pm

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CONNECT

