

Ask Me Anything: Navigating Infinite Automation Possibilities with Botkeeper & Zapier

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Speaker Introductions



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Description

Join us for an illuminating AMA session with Botkeeper's Product and Engineering Leadership, dedicated to demystifying the world of infinite automation possibilities. Whether you're a seasoned Botkeeper user, exploring potential solutions like Zapier, or simply curious about the next wave of automation innovation, this session promises insights for all.

Our leaders are eager to share and discuss the power of Botkeeper & Zapier's integration. But beyond the technicalities, we aim to explore the broader vision of how such integrations are shaping industries, and what they mean for professionals like you.

Learning Objectives

- Mastering Workflow Templates: Understand how tools and integrations, such as Botkeeper & Zapier, offer templates that can radically simplify and improve routine tasks. Find out how these can be tailored to your specific needs, regardless of your current platform or service.
- Unleashing Creative Automation: Engage in vibrant discussions that stretch your understanding of what automation can achieve. Work with peers to ideate innovative workflows that challenge the status quo.
- Prioritizing Client-Centric Solutions: Reflect on how automation, whether through Botkeeper or other platforms, can transform client interactions. Explore how to create a seamless, efficient, and client-focused service model using the latest in automation technology.

Session Overview

- Zapier Overview
- Refresher on Botkeeper
- Introducing the Botkeeper Zapier Integration
 - Triggers
 - Actions
- Workflow Examples
 - Automated Client Onboarding
 - Statement or Report Delivery
 -
- Brainstorming Additional Use Cases

Who knows Zapier?

Streamline and automate your processes with workflows that you and your team can create - **no developers needed!**

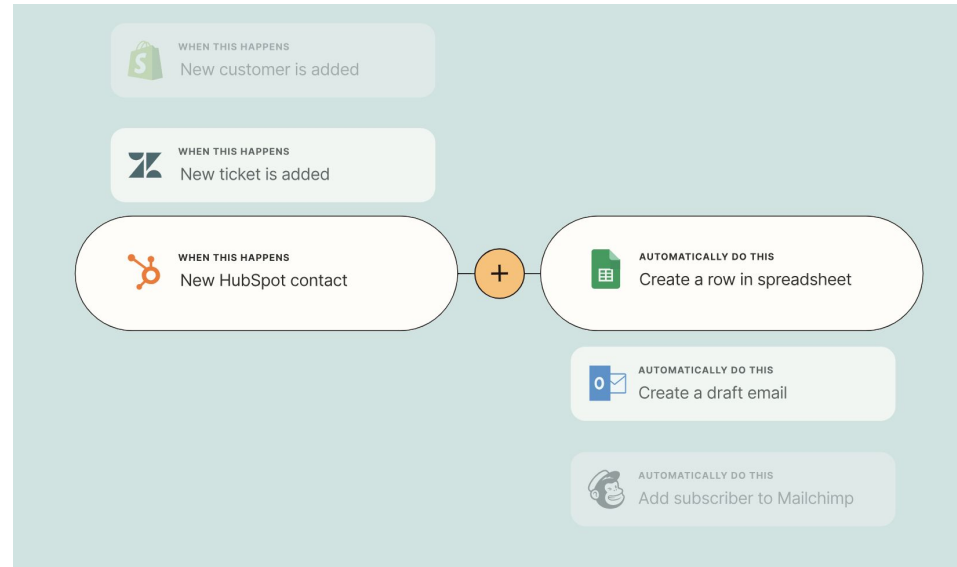
AND

Their lowest package is **FREE**

Integrations with over 6,000 applications which means *endless possibilities.*

Apps supported: <https://zapier.com/apps>

Source: <https://zapier.com/>



Poll #1

Who already uses Zapier?

How does Zapier work?

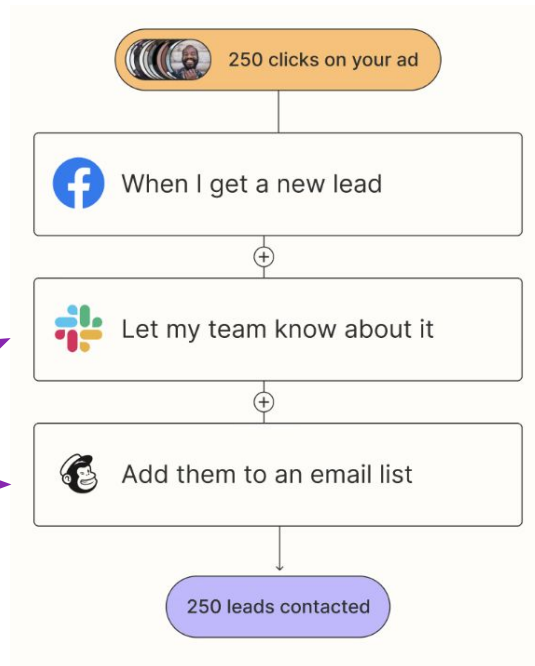
Define a Trigger

This is the event that starts the automation. In the example here, the **trigger** is the form submission on Facebook → a new lead

Define Action(s)

This is the event an automation performs after it is triggered. In the example here, the **actions** are:

1. Notifying team via slack message
2. Adding the lead to a marketing list



Poll #2

What workflows are you using
Zapier for today?

Refresher on botkeeper



Work

Entity management module designed to keep your firm's communication organized and tasks on track - allowing visibility to pinpoint staffing needs and automatic task completion



Documents

Centralized location to organize documents, complete with an on-screen document reader that allows easy viewing, commenting and @mentioning on documents outside of their native programs



Transaction Manager

Leverages machine learning to reduce manual reviews and offers client collaboration tools for categorizing, classifying, and splitting transactions



Smart Connect

Connect with financial institutions so Botkeeper can monitor disconnections and download client financial statements to reconcile clients' accounts



Password Manager

Credential management tool that allows you to add, edit, and filter all your clients' credentials in a single, secure location



Transaction Insights

Track how your client's model is performing by having real time metrics on high, medium, and low confidence transactions as well as how many were automated and what the work distribution looked like.



Coming Very Soon

BotReview: Analyzes the financial data in your client's GL and will detect and flag anomalies to review to ensure your books are complete and accurate.

Activity Feed: One place to triage communication with your clients and see all activity within the platform.

An all-in-one financial platform to collaborate with clients, manage their bookkeeping, and innovate your firm. The highest commitment to data security and privacy standards.

AI & Machine Learning:
1000+ models, proprietary sequence, human assisted and supervised by the Botkeeper team

Refresher on botkeeper



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Entity management module designed to keep your firm's communication organized and tasks on track - allowing visibility to pinpoint staffing needs and automatic task completion



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Track how your client's model is performing by having real time metrics on high, medium, and low confidence transactions as well as how many were automated and what the work distribution looked like.



Business Insights

Manage and track trending analytics, data visualization, KPIs /unique insights with our real-time sync of financial and non-financial data.



Coming Very Soon

BotReview: Analyzes the financial data in your client's GL and will detect and flag anomalies to review to ensure your books are complete and accurate.

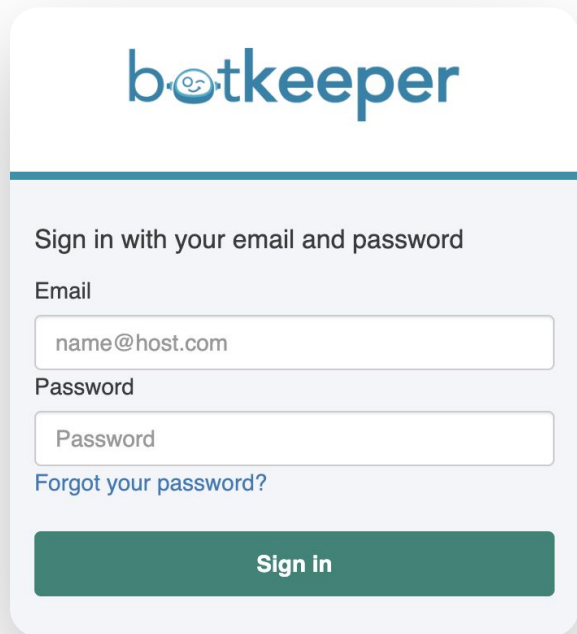
Activity Feed: One place to triage communication with your clients and see all activity within the platform.

An all-in-one financial platform to collaborate with clients, manage their bookkeeping, and innovate your firm. The highest commitment to data security and privacy standards.

AI & Machine Learning: 1000+ models, proprietary sequence, human assisted and supervised by the Botkeeper team

Introducing the Botkeeper Zapier Integration!

- Currently available by invite only, expected to be in *Beta* very soon!
- Want early access? Email angelina@botkeeper.com or travis@botkeeper.com with the subject “*Unchained Attendee Zapier Early Access*”.
- Securely authenticate using your existing Botkeeper account and access all of the same data from your portal.
- Currently supports 2 triggers and 6 actions to supercharge your workflows!

A screenshot of the Botkeeper sign-in interface. At the top, the Botkeeper logo is displayed in blue. Below the logo, the text "Sign in with your email and password" is centered. Underneath, there are two input fields: "Email" with the placeholder text "name@host.com" and "Password" with the placeholder text "Password". A blue link "Forgot your password?" is positioned below the password field. At the bottom, a dark green button with the text "Sign in" in white is centered.

What does this mean to your firm?

Empower Your Team!

No developers needed to create automation workflows → just creative minds & access to connect

Integrate Your Way

Your systems. Your workflows. Endless possibilities. Be an automator, not a follower.

Level Up


Remove those admin tasks and use your brain power towards higher impact work.

TRIGGER Document Uploaded

Triggers when a new document or version is uploaded into a specific client folder in Botkeeper

Examples:

- SmartConnect auto fetches a new bank statement in the Bank Statements folder - automate copying that to your document management system
- Management or Financial Statements uploaded - automate emailing them as attachments to clients

 Trigger
1. Document Uploaded in Botkeeper (1.0.0)

App & event

Account

Trigger

Client Name Search (Optional)

For users with access to many clients, enter search text to filter the list below

* Client (required)

Client Folder

Only matches a specific folder, otherwise leave blank to search all of the selected client's folders

* Include Subfolders (required)

Matches files within subfolders of the specified folder

* Uploaded Since (required)

Matches files uploaded since the specified date

TRIGGER Task Created or Updated

Triggers when a task meeting a certain criteria is created or updated

Examples:

- New tasks are created assigned to you or a team member - duplicate these tasks in your existing workflow management system
- Tasks are completed by your team - monitor and track progress by syncing this data into a spreadsheet or other analytical tool

Assignee Email

Task Name

Firm Name Search (Optional)

For users with access to multiple firms, enter search text to filter the list below

Firm

Client Name Search (Optional)

For users with access to many clients, enter search text to filter the list below

Client

Status

*** Created or Updated Since** 📅 (required)

Matches tasks created or updated since the specified date

Poll #3

What other TRIGGERS would you like to see in the Botkeeper integration?

ACTION Create a New Client

Create new clients in Botkeeper

Example:

- A client signs a contract or something changes in your sales tool that triggers the creation of the client in Botkeeper
- Adding a row into a client management spreadsheet and trigger creation of the corresponding client portal in Botkeeper

2. Create a Client in Botkeeper (1.0.0) ✕

* **Client Name** (required)

* **DBA Name** (required)

* **Primary Industry** (required)

* **Secondary Industry** (required)

* **Accounting Software** (required)

Firm Name Search (Optional)

For users with access to multiple firms, enter search text to filter the list below

* **Firm** (required)

i By Creating a Client you agree to the Botkeeper [Terms of Service](#)

ACTION Invite a User

Invites a new Client User to a Botkeeper Client Portal with either the Client Admin or Client Ops roles.

Note: This action can be sequenced after the Create Client or Find Client actions, using a custom value for Client Id.

Examples:

- You can automatically invite clients to their new Botkeeper Client portal on creation.
- When a new employee joins your team, you can automatically invite them into the system.

2. Invite a User in Botkeeper (1.0.0) ✎ ✕

Client Name Search (Optional)

For users with access to many clients, enter search text to filter the list below

* Client Id (required)

Source this value from the clientId property from the Create or Find Client actions

* Client Email Address (required)

* User Role (required)

User Role Custom

- Client Admin**
5eeded00524f4c4500000031
- Client Ops**
5eeded00524f4c450000002d

ACTION Create a Custom Task

Create and assign custom tasks in Botkeeper to your client or members of your team

Example:


- If you have another project management tool, when someone completes something there you can create another task for someone else.

2. Create a Custom Task in Botkeeper (1.0.0) ✎

Client Name Search (Optional)

For users with access to many clients, enter search text to filter the list below


* **Client** (required)

User Name or Email Search (Optional)

Enter partial name or email address to filter the list below

* **Assignee** (required)

* **Task Name** (required)

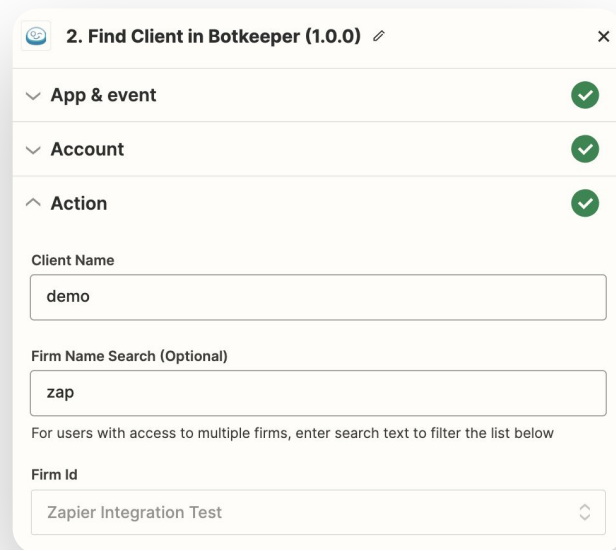
Instructions

* **Days Till Due** ^{1.0} (required)

SEARCH ACTIONS

Can be used as standard search actions or in multi-step Zaps to support dynamic lookups, e.g. looking up a client or user for task assignment.

- **Find Client:** Finds a client by name, optionally within a firm
 - **Search Fields:** client name, firm
- **Find Task:** Finds tasks matching the search criteria
 - **Search Fields:** assignee email, name, firm, client, status
- **Find User:** Finds a user within a client by name or email
 - **Search Fields:** client*, user name, email



The screenshot shows a configuration window for the Zapier action "2. Find Client in Botkeeper (1.0.0)". The window is divided into three sections: "App & event", "Account", and "Action". Each section has a green checkmark icon on the right. The "Action" section contains three input fields: "Client Name" with the value "demo", "Firm Name Search (Optional)" with the value "zap", and "Firm Id" with a dropdown menu showing "Zapier Integration Test". Below the "Firm Name Search" field, there is a note: "For users with access to multiple firms, enter search text to filter the list below".

Poll #4

What other **ACTIONS** would you like to see in the Botkeeper integration?



Workflow #1 – Automated Client Onboarding

Things to figure out:

1. What is your sales tool? Where do you capture new signed clients? Ex. Signed Docusign, Deal Stage, etc.
2. What information do you need to gather from your client after a signed engagement? (Client Checklist)
3. How do you welcome your client in and set expectations? Ex. Do you send out an email giving them the lay of the land? Text message?
4. What happens after you get what you need? Does your internal team have tasks to get started?

Automated Client Onboarding Example

1 Get HubSpot Deal & Associated Company & Contact

 Trigger
1. Updated Deal Stage in HubSpot

 Action
2. Find Associations in HubSpot

 Action
3. Get Contact in HubSpot

2 Create Client in Botkeeper & Invite Client User

 Action
4. Create a Client in Botkeeper (1.0.0)

 Action
5. Invite a User in Botkeeper (1.0.0)

3 Create Notification to Team & Welcome Email to Client

 Action
6. Send Channel Message in Slack

 Action
7. Send Email in Gmail


4 Create Client Onboarding Tasks


 Action
8. Create a Custom Task in Botkeeper (1.0.0)

 Action
9. Create a Custom Task in Botkeeper (1.0.0)

 Action
10. Create a Custom Task in Botkeeper (1.0.0)


1. Get HubSpot Deal & Associated Company & Contact

 Trigger
1. Updated Deal Stage in HubSpot

 Action
2. Find Associations in HubSpot

- Each trigger and action provides an output of data to use in following actions
- Output format is depended on application connected → sometimes more friendly than others
- Use the **Deal ID** variable from trigger to get associated company and contact

* The ID of the object you want to search the association (required)


 1. Deal Id: 15162979149

* The type of the object you want to search the association (required)

deal


* Number of association types you want to search 1 2 3 (required)

Two

 Specify here associations configs for **first** type

* Type of the objects the from object is being associated with (required)


company

 Specify here associations configs for **second** type

* Type of the objects the from object is being associated with (required)

contact

Sample Output Data

 Action



3. Get Contact in HubSpot

App & event ✓

Account ✓

Action ✓

Test ✓

 →  **Send Contact to HubSpot**
We'll use this as a sample for setting up the rest of your Zap.

i A Contact was sent to HubSpot about 28 minutes ago

Search item data...

```
id 68637216
createdAt 2022-11-02T22:52:30.255Z
updatedAt 2023-09-15T01:54:11.981Z
archived false
address
annualrevenue
city
company Parks and Recreation Department
country
createdate 2022-11-02T22:52:30.255Z
email angelinadelago@gmail.com
fax
```

[Retest step](#) [Continue](#)


2a. Create Client

Here we used the variables returned for the client name and chose the:

1. Primary Industry
2. Secondary Industry
3. Accounting Software

HOWEVER, you can use variables as long as they match our expected values, which can be seen from the dropdown.

Suggestion: If you are going to zap this process, create properties in your trigger system or point of reference that map to botkeeper values.

 Action
4. Create a Client in Botkeeper (1.0.0)

App & event

Account

^ Action

* Client Name (required)

1. Deal information: Deal Name: Zapier New Client

* DBA Name (required)

1. Deal information: Deal Name: Zapier New Client

* Primary Industry (required)

Service

* Secondary Industry (required)

Accounting

* Accounting Software (required)

Quickbooks Online

2b. Invite Client

Client Id:

Derived from the output of the *Create a Client in Botkeeper*

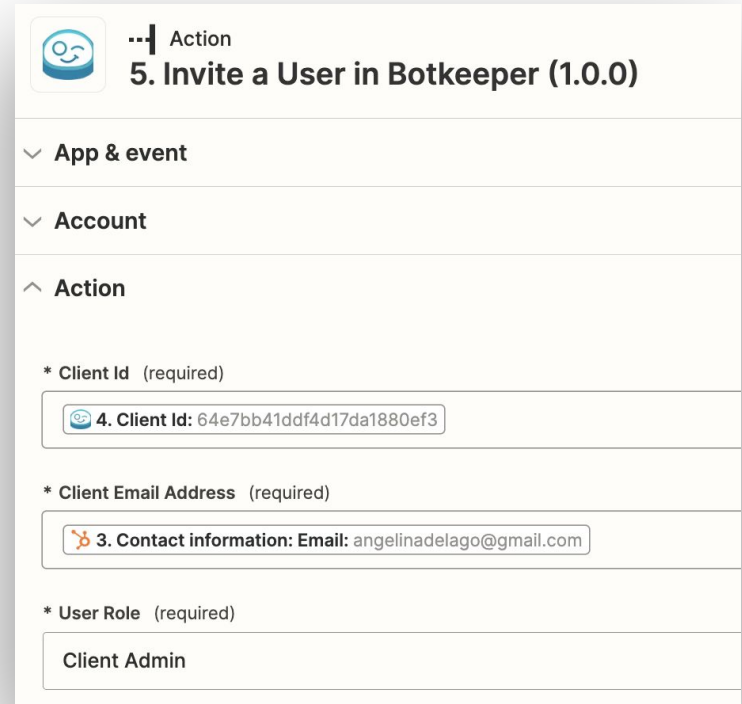
Client Email Address:

Derived from the output of the *Get Contact in HubSpot*

Role:

There are 4 different role types:

1. Partner Admin
2. Partner Ops
3. Client Admin
4. Client Ops



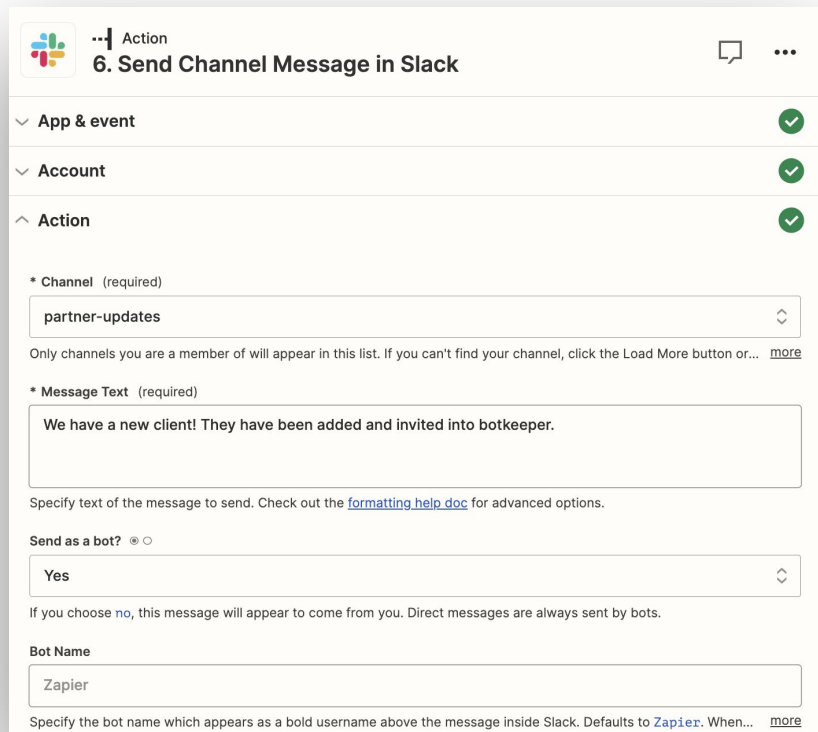
The screenshot shows the configuration for the action "5. Invite a User in Botkeeper (1.0.0)". It is categorized under "App & event" and "Account". The "Action" section is expanded, showing three required fields:

- * Client Id (required)**: A text input field containing "4. Client Id: 64e7bb41ddf4d17da1880ef3".
- * Client Email Address (required)**: A text input field containing "3. Contact information: Email: angelinadelago@gmail.com".
- * User Role (required)**: A dropdown menu with "Client Admin" selected.

3a. Create Notification to Team

At Botkeeper we use slack **BUT** if you use Microsoft teams you can do the same there!

In the message text you can inject variables from the **TRIGGER** and/or **ACTIONS** to make it more dynamic. For example, here I could include the client name, the user's email address and deal amount.



The screenshot shows the Zapier configuration page for the action "6. Send Channel Message in Slack". The interface is organized into sections with expandable/collapsible headers, each with a green checkmark icon on the right:

- App & event**: Expanded, showing the selected app and event.
- Account**: Expanded, showing the selected account.
- Action**: Expanded, showing the configuration options for the "Send Channel Message in Slack" action.

The configuration options include:

- * Channel (required)**: A dropdown menu with "partner-updates" selected. Below it is a note: "Only channels you are a member of will appear in this list. If you can't find your channel, click the Load More button or... [more](#)".
- * Message Text (required)**: A text area containing the message: "We have a new client! They have been added and invited into botkeeper." Below it is a note: "Specify text of the message to send. Check out the [formatting help doc](#) for advanced options."
- Send as a bot?**: A radio button selection with "Yes" selected. Below it is a note: "If you choose **no**, this message will appear to come from you. Direct messages are always sent by bots."
- Bot Name**: A text field containing "Zapier". Below it is a note: "Specify the bot name which appears as a bold username above the message inside Slack. Defaults to [Zapier](#). When... [more](#)".

3b. Welcome Email to Client

We all send out a message to our clients setting expectations.

AUTOMATE THAT!

Leave the checklist or requirements out (create them as tasks in the portal) but here you can let them know what to expect and how to communicate with you.

Action

- App & event ✓
- Account ✓
- Action ✓

To

3. Contact information: Email: angelinadelago@gmail.com

Enter text

* Subject (required)

What to expect...

Body Type

plain

If using the HTML option, you must add any and all formatting (paragraphs, lists, etc) directly using HTML. [Learn more.](#)

* Body (required)

Hi 3. Contact information: First Name: No data, Welcome to Sharkbite! You should have received an email invitation to our portal. This is where all communication will be, documents, shared and connections made. Blah blah blah.

Signature

angelina@botkeeper.com

Include a default signature with the email? Will be placed at end of the message after a line break and another "--" lin... [more](#)

Label/Mailbox

Choose value...

4. Create Client Onboarding Tasks

Requirements from prior steps:


Client Id

Client Email

Get your client checklist out of email and create tasks for each one here.

What is the benefit?

- Noone productive tracks tasks in email
- Increase Accountability
- Enforces organization and centralized communication
- Management visibility

 Action
8. Create a Custom Task in Botkeeper (1.0.0) 🗨️ ⋮

^ Action ✔️

Client Name Search (Optional)

For users with access to many clients, enter search text to filter the list below

* **Client** (required)

 ⌵

User Name or Email Search (Optional)

Enter partial name or email address to filter the list below

* **Assignee** (required)

 ⌵

* **Task Name** (required)

Instructions

Please add Sharkbite as an Accounting Firm in your QBO account. Use angelina@botkeeper.com as the email address.

* **Days Till Due 1.0** (required)

Poll #5

What's another piece of client onboarding we have missed?



Workflow #2 – Statement or Report Delivery

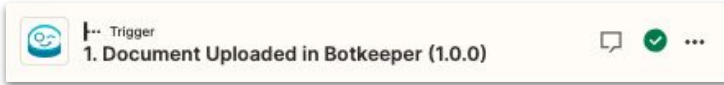
Things to figure out:

1. Do you store documents in another storage solution? If so, do you need to upload statements or other documents in Botkeeper & somewhere else?
2. Do you send management reports to your clients each month?
3. Would you want to task your client to review the management report or just bring it to their attention?

Automated Statement Upload Example

1

Get Statement From Botkeeper

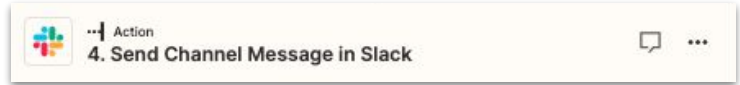


Trigger
1. Document Uploaded in Botkeeper (1.0.0)

This card represents a trigger event. It features a Botkeeper icon on the left, the text "Trigger" and "1. Document Uploaded in Botkeeper (1.0.0)", and a speech bubble icon, a green checkmark, and a three-dot menu icon on the right.

3

Create Notification to Team




Action
4. Send Channel Message in Slack

This card represents an action event. It features a Slack icon on the left, the text "Action" and "4. Send Channel Message in Slack", and a speech bubble icon, a green checkmark, and a three-dot menu icon on the right.

2

Upload File to Other System




Action
3. Upload File in Google Drive

This card represents an action event. It features a Google Drive icon on the left, the text "Action" and "3. Upload File in Google Drive", and a speech bubble icon, a green checkmark, and a three-dot menu icon on the right.

Document Upload Trigger

In the **TRIGGER** you need to define the client to look at and the folder to monitor for incoming documents.

You can choose a main folder like we did in this example and also include subfolders to cover all bank statements.

 Trigger
1. Document Uploaded in Botkeeper (1.0.0)

App & event ✓

Account ✓

Trigger ✓

Client Name Search (Optional)

For users with access to many clients, enter search text to filter the list below

* Client (required)

Client Folder

Only matches a specific folder, otherwise leave blank to search all of the selected client's folders

* Include Subfolders (required)

Matches files within subfolders of the specified folder

* Uploaded Since (required)

Matches files uploaded since the specified date

Poll #6

What are some COOL use cases you can envision for the Botkeeper Zapier integration?

Let's Get Creative!



Each table is a team! Join a nearby table if yours has < 4 people!

Question How much wood could a woodchuck chuck if a woodchuck could chuck wood? Just kidding...

What annoying process (big or small) at your firm do you think could be automated?

Work with your peers to write down the process and a new workflow that could automate it all or some of it away. Shoot for the stars!

How can we be more client-centric?

Problem

What is preventing you from being as client-centric as you want to be?

Solution

Work together to come up with an automated solution that would solve some of your problems.

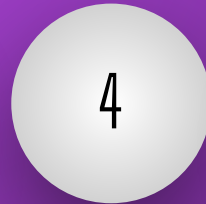
When you don't know what's possible → DREAM BIG

Poll #7

How valuable was this session?



Not at all



Extremely

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THANK YOU!
