Integrating Zapier with Pure Workflow
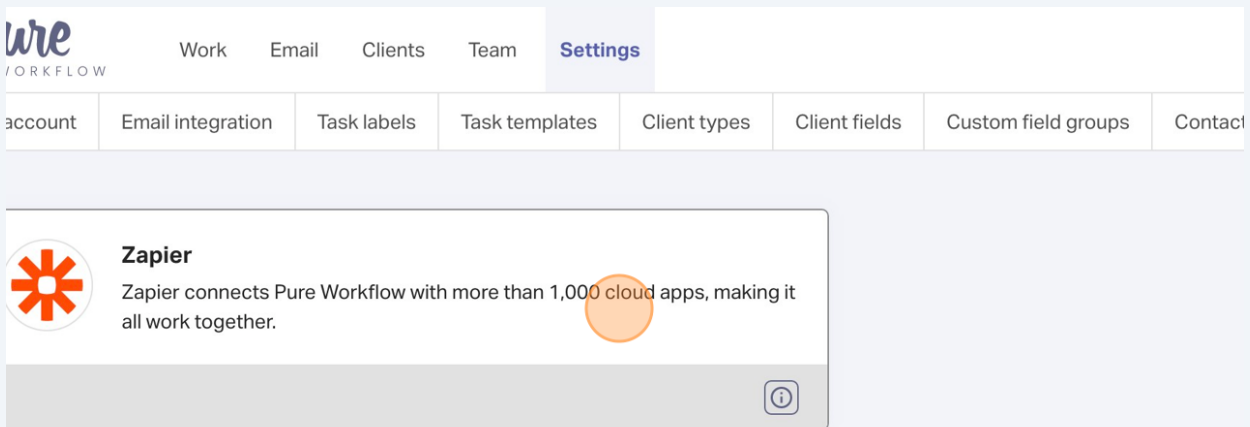
pure BOOKKEEPING

1 Navigate to **https://pureworkflow.io/settings** Click "Settings"

pure WORKFLOW

Work | Email | Clients | Team | Settings

o do | Reassigned | Snoozed | Done

To do (0) | + Add task | Due by | Today

TASK NAME | CLIENT

2 Click "Integrations" **https://pureworkflow.io/settings/integrations**

field groups   Contact fields   Workspace settings   Integrations

Update profile and sign

Change

Change email prefere

3 Click on the Zapier Integration

ure
WORKFLOW

Work   Email   Clients   Team   **Settings**

account   Email integration   Task labels   Task templates   Client types   Client fields   Custom field groups   Contact

Zapier
Zapier connects Pure Workflow with more than 1,000 cloud apps, making it all work together.

4 Click "Browse Pure Workflow automations for Zapier"

Zapier extends the capabilities of Pure Workflow and automates your workflows. For example, use it to crea
other apps or start Pure Workflow tasks automatically in response to a form submission.

To to enable the integration, you must first activate Pure Workflow in your Zapier account.

Browse Pure Workflow automations for Zapier

Your API secret key

V8R1g

Please ensure this key is kept secret at all times.

Your Company Key

a

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5 Click "Accept Invite & Build a Zap"

is practice management for accountants and
mprove visibility, collaboration and automation for your
s.

The Pure Workflow team invites you to test their Zapier integrat
before it's available for everyone. Neat! Accept the invite and bu
with Pure Workflow to get started.

If you know and trust the developers behind this email address,
this invitation should be safe to accept. This app has not been r
or approved by Zapier for functionality or security.

Accept Invite & Build a Zap

appens Next?

invitation gives you access to an early Beta version of Pure Workflow Zapier, before
ublicly. To test it out, you'll be building an automated workflow (a Zap) with Pure
Zapier editor. The editor was made for do-it-yourself automation so you can set up

TIP **Need Help?**

This integration is built and maint
by Pure Workflow so if you need
support or want to send along so

6 Click "My Apps"

Dashboard

Zaps

Transfers

My Apps

Zap History
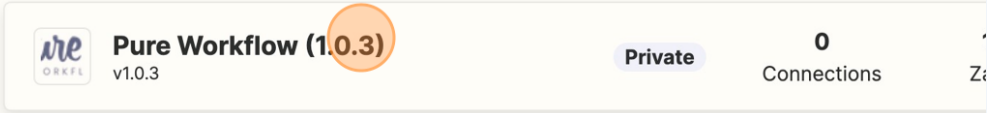
Explore

Get Help

7 Click "Custom integrations"

Apps

All apps

Custom integrations

8 Click "Pure Workflow (1.0.3)"

ays to try Zapier's paid features. Upgrade anytime for as low as $19.99 USD/month.

🔍 Search apps   + Add

Pure Workflow (1.0.3)
v1.0.3   Private   **0**   Za
ons   Connections

9 Click "Add connection"

ⓘ **Welcome to your Professional trial!**
You have 14 days to try Zapier's paid features. Upgrade anytime for as low as $19.99 USD/month.

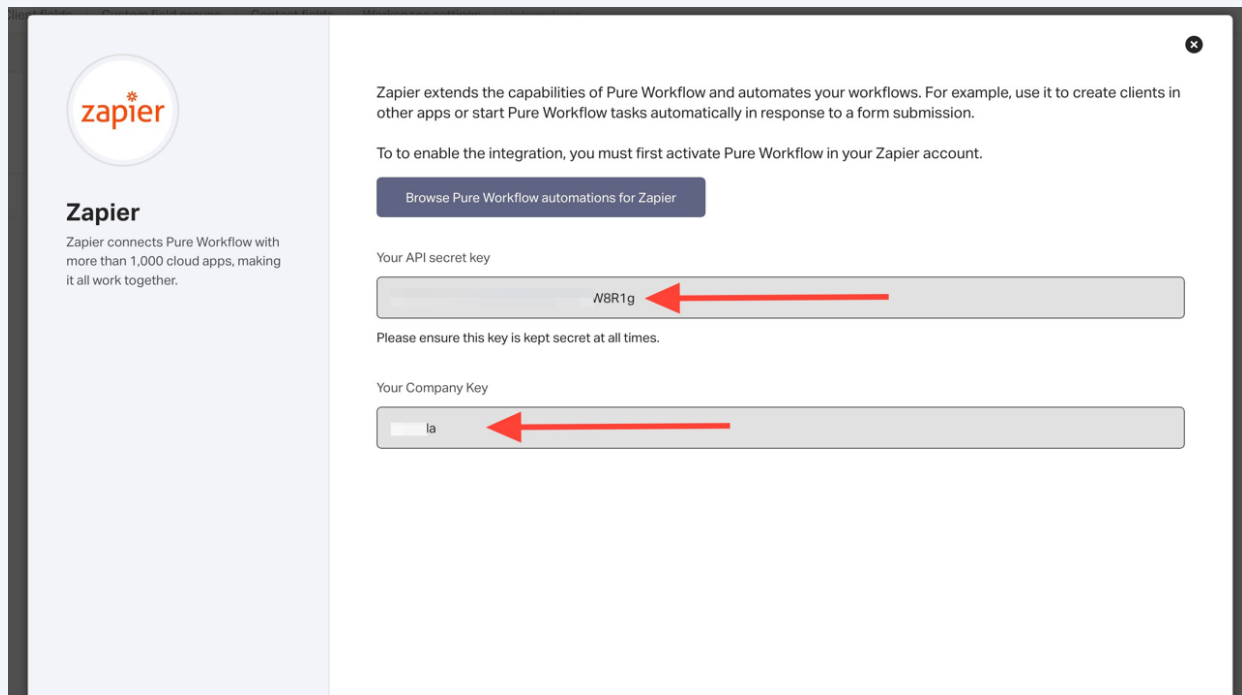🔍 MP

← My apps

Pure Workflow (1.0.3)   + Add connection

Connections ⓪   Zaps ①

You do not have any connections.

10 Copy "API Secret Key" and "Your Company Key"

11 Paste "API Secret Key" and "Your Company Key"

Allow Zapier to access your Pure Workflow (1.0.3) Account?

API Key (required)

Check the settings page on Pure Workflow. You will see a field called API Key. Copy its value here.

API Secret Key

Account (required)

Check the settings page on Pure Workflow. You will see a field called Company Key. Copy its value here.

https:// Your Company Key .pureworkflow.io/

Yes, Continue   Cancel

12   Navigate to **https://zapier.com/app/dashboard**

13   Navigate to **https://zapier.com/app/connections/google-contacts?hl=33385472**

14   Click "Create Zap"
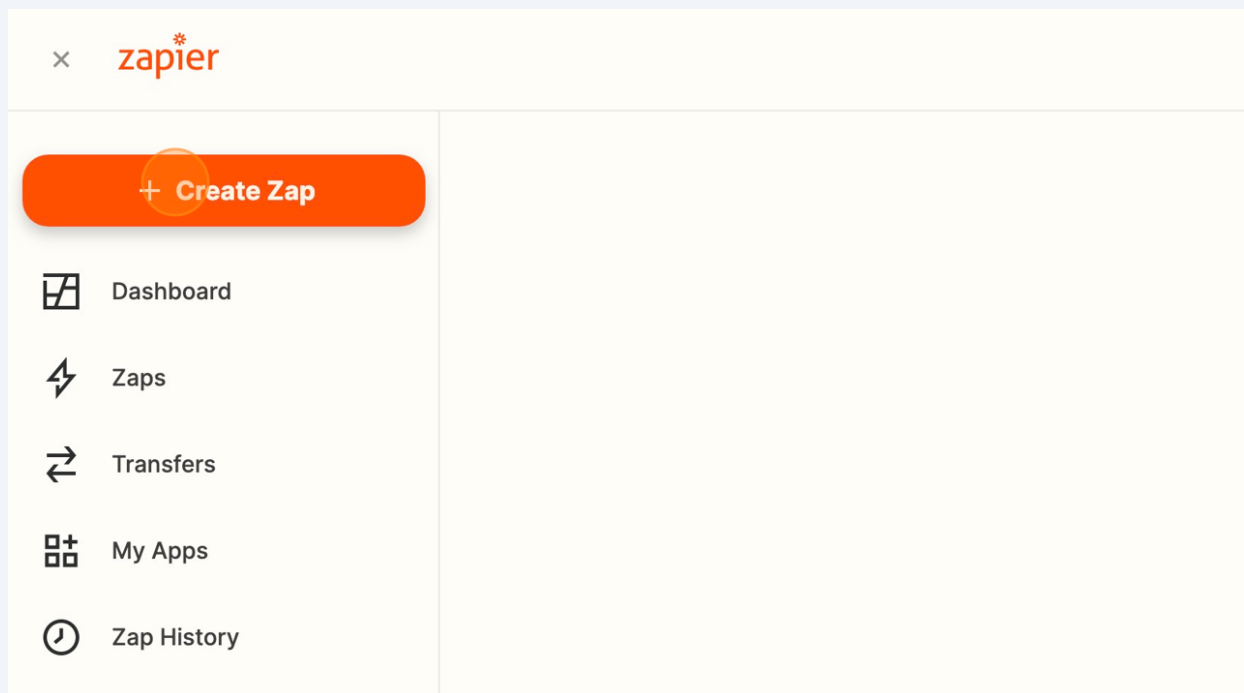
15   Type "google"

16 Click here.

Google Sheets

Google Calendar

Google Drive

Google Forms

Google Contacts

Google Docs

2. Action

17 Click the "Choose an event" field.

Choose app & event

Google Contacts

Trigger Event

Choose an event

This is what starts the Zap.
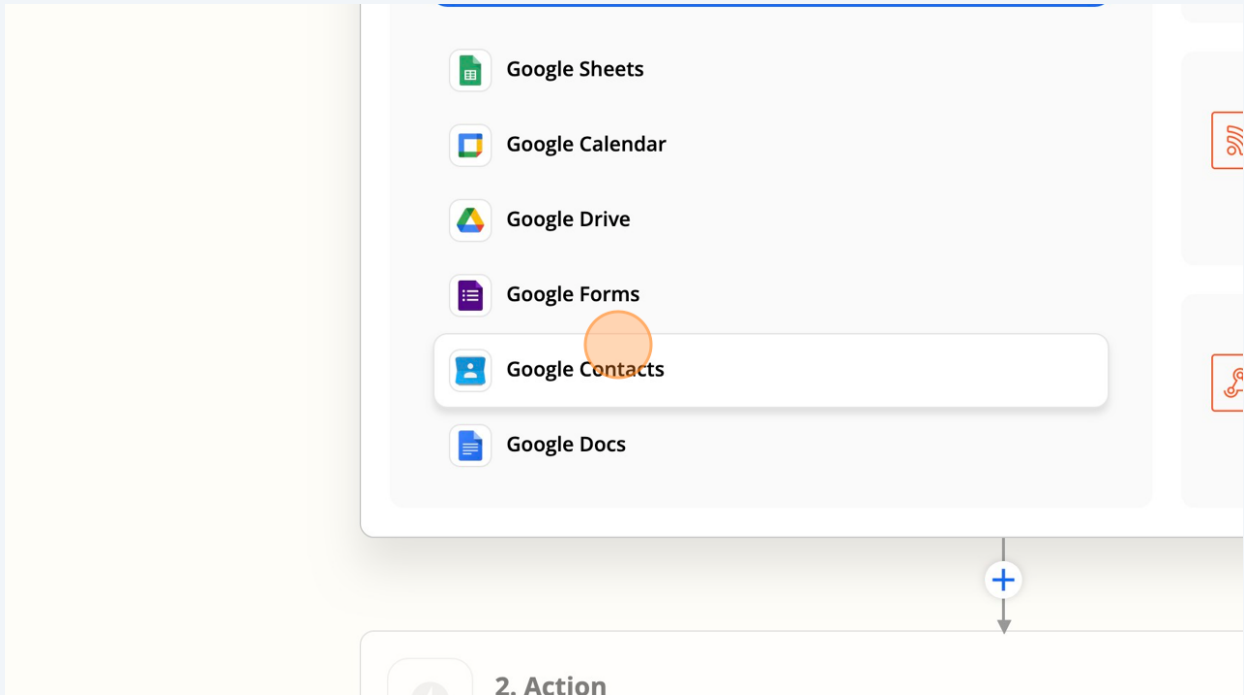
To continue, choose an event
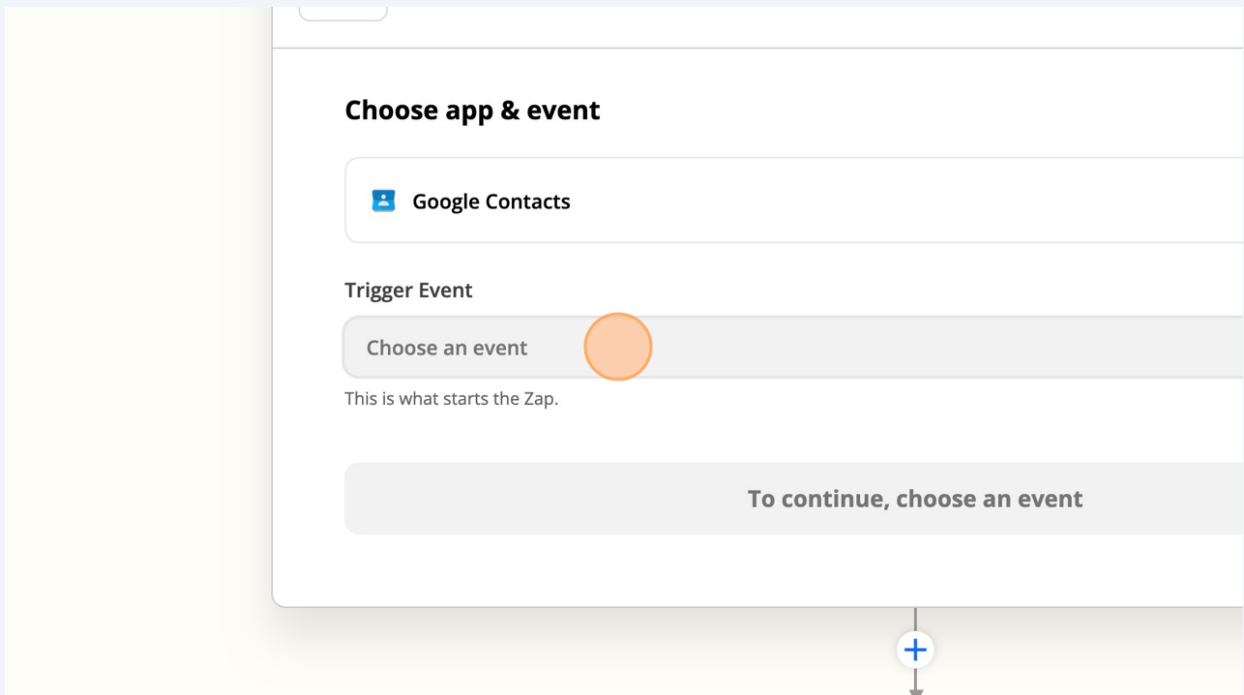
18   Click "New or Updated Contact"

👤 **Google Contacts**

Trigger Event

Choose an event

New Group
Triggers when a group is created.

New or Updated Contact
Triggers when a contact is created or updated.

2. Action
An action is an event a Zap performs after it starts

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19   Click "Continue"

👤 **Google Contacts**   Change

Trigger Event   (required)

New or Updated Contact   ⇅

This is what starts the Zap.

Continue

2. Action
An action is an event a Zap performs after it starts

20 Click "Choose an account..."

21 Click "Google Contacts **michael@purebk.com**"
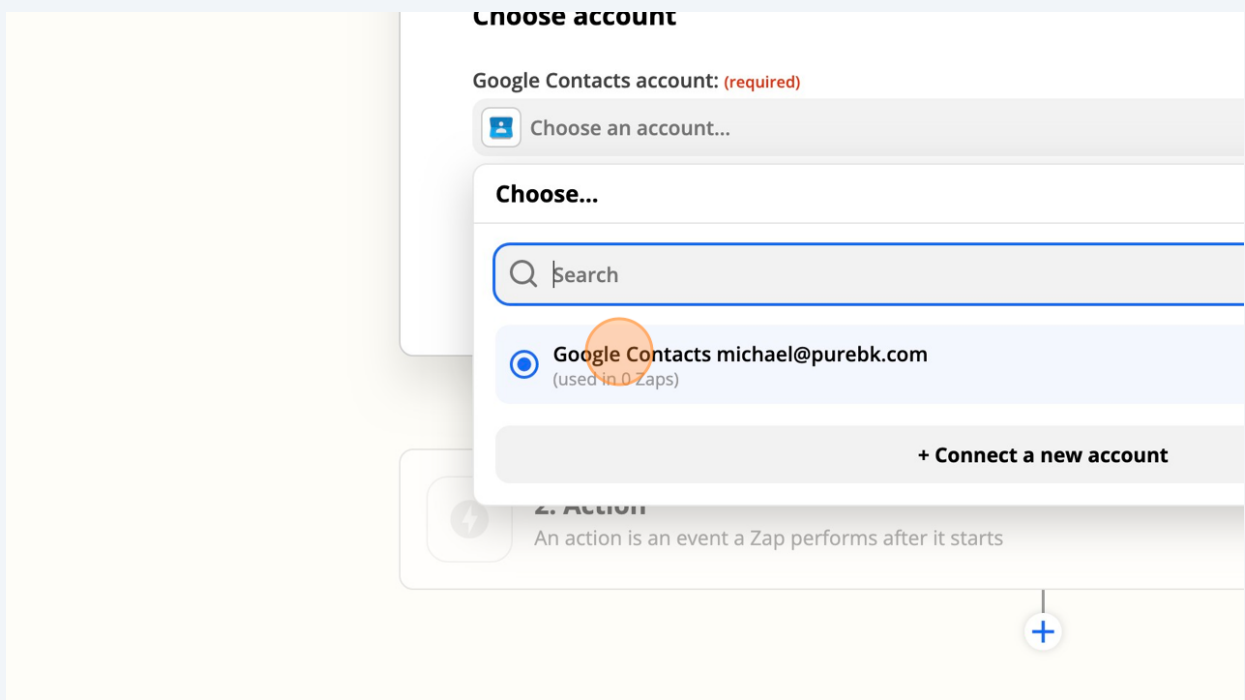
22   Click "Continue"

Choose app & event

Choose account

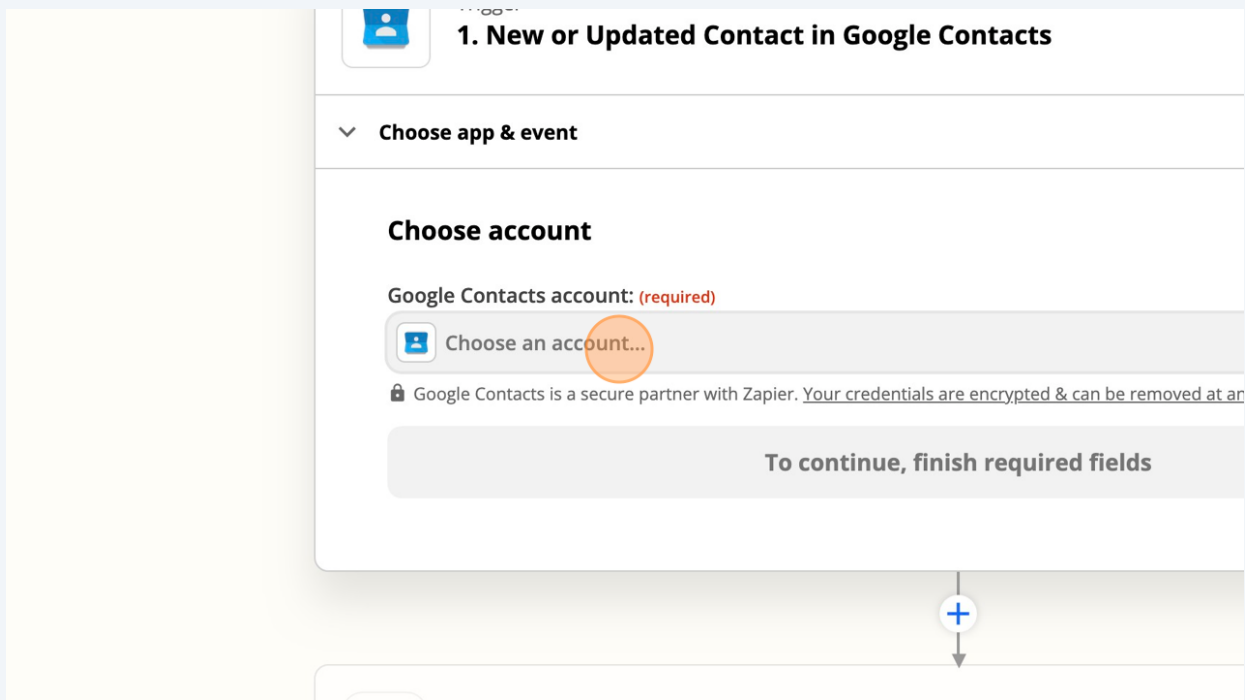Google Contacts account: (required)   Manage connected accounts

🔲 Google Contacts michael@purebk.com   ⬍

🔒 Google Contacts is a secure partner with Zapier. Your credentials are encrypted & can be removed at any time.

Continue

➕

2. Action
An action is an event a Zap performs after it starts

23   Click "Test trigger"

🔲 → ✳
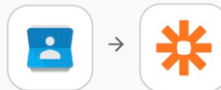
Test your trigger

We'll find a recent contact in your Google Contacts account

🔲 Google Contacts michael@purebk.com to confirm that the right account is connected and your trigger is set up correctly.

Test trigger

➕

2. Action

24   Click "Continue"

first: Ane⬛⬛⬛
last: Mea⬛⬛⬛
photo: https:/⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛⬛ D9ZCmM6AG4J-
       PW3q⬛⬛⬛⬛⬛⬛⬛⬛
groups: Imported on 11/2
emails:
    other: mear⬛⬛⬛⬛⬛@gmail.com

Continue

+

2. Action
An action is an event a Zap performs after it starts

25   Type "pure workflow"

26 Click "Pure Workflow (1.0.3)"

An action is an event a Zap performs after it starts

App Event
Do something in an app

🔍 pure wo   ⊗

nre Pure Workflow (1.0.3) **BY INVITE**

27 Click the "Choose an event" field.

Choose app & event

nre Pure Workflow (1.0.3)

Action Event

Choose an event

This is performed when the Zap runs.

To continue, choose an event

+
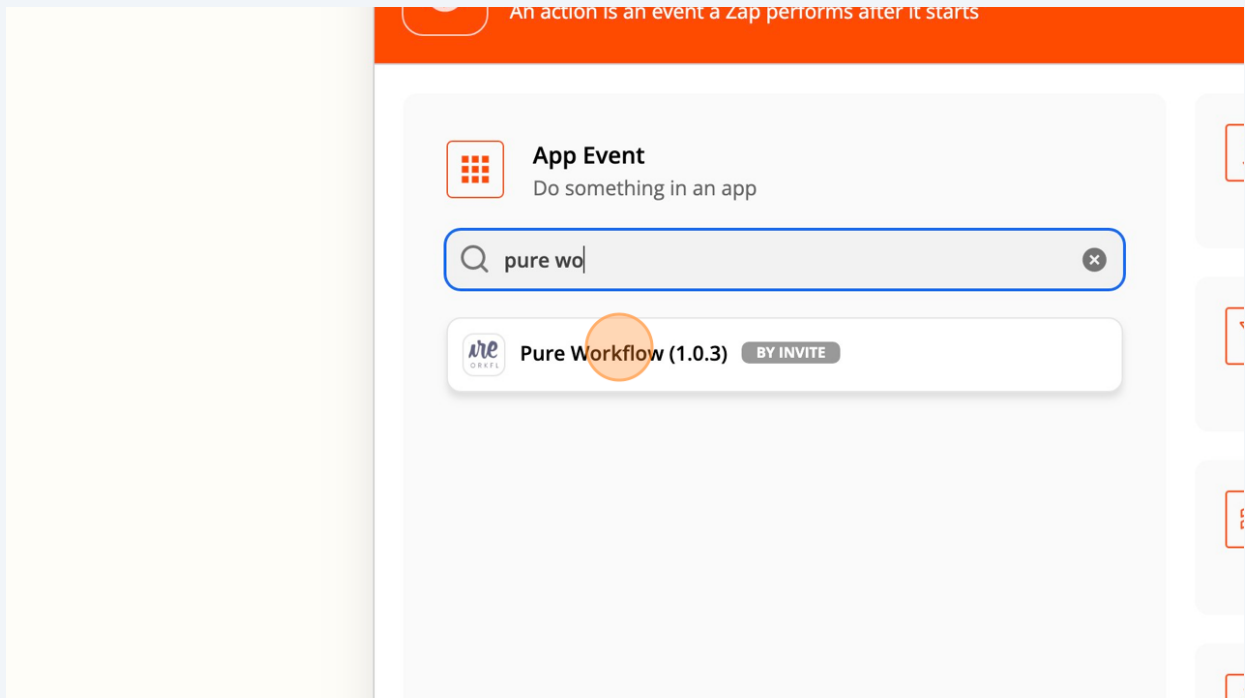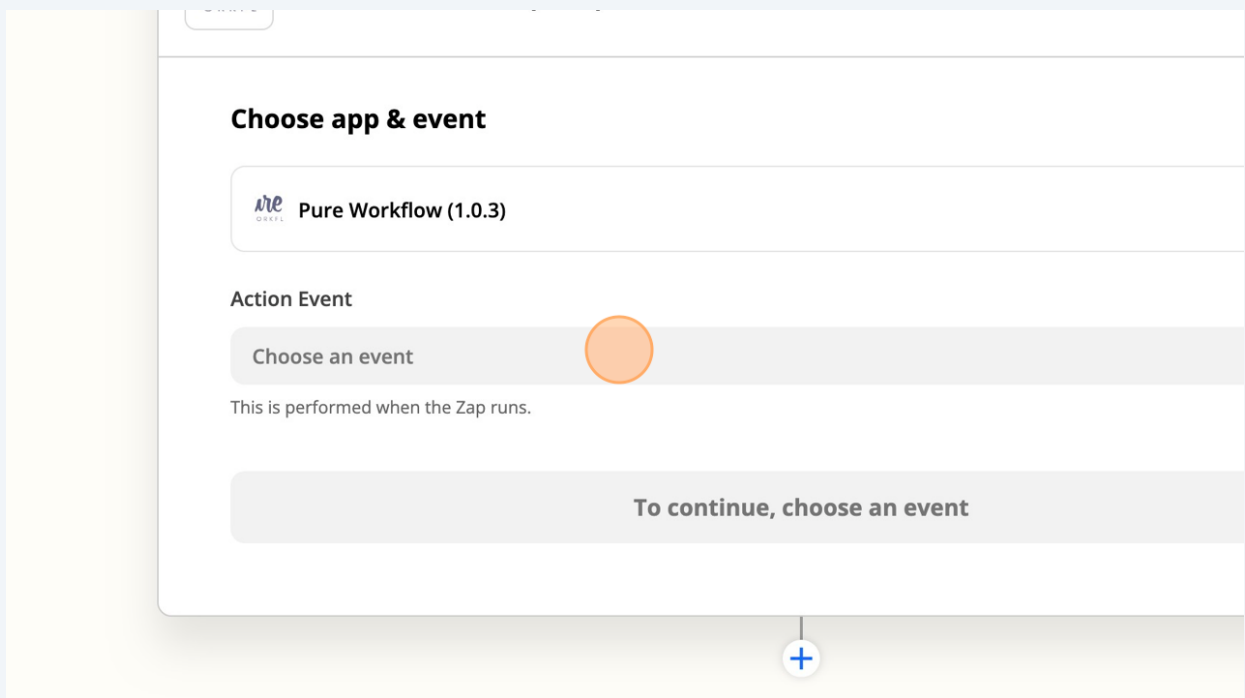
28 Click "Create or update a client, based on the Client ID or the client's name already existing."

Choose an event

CREATE
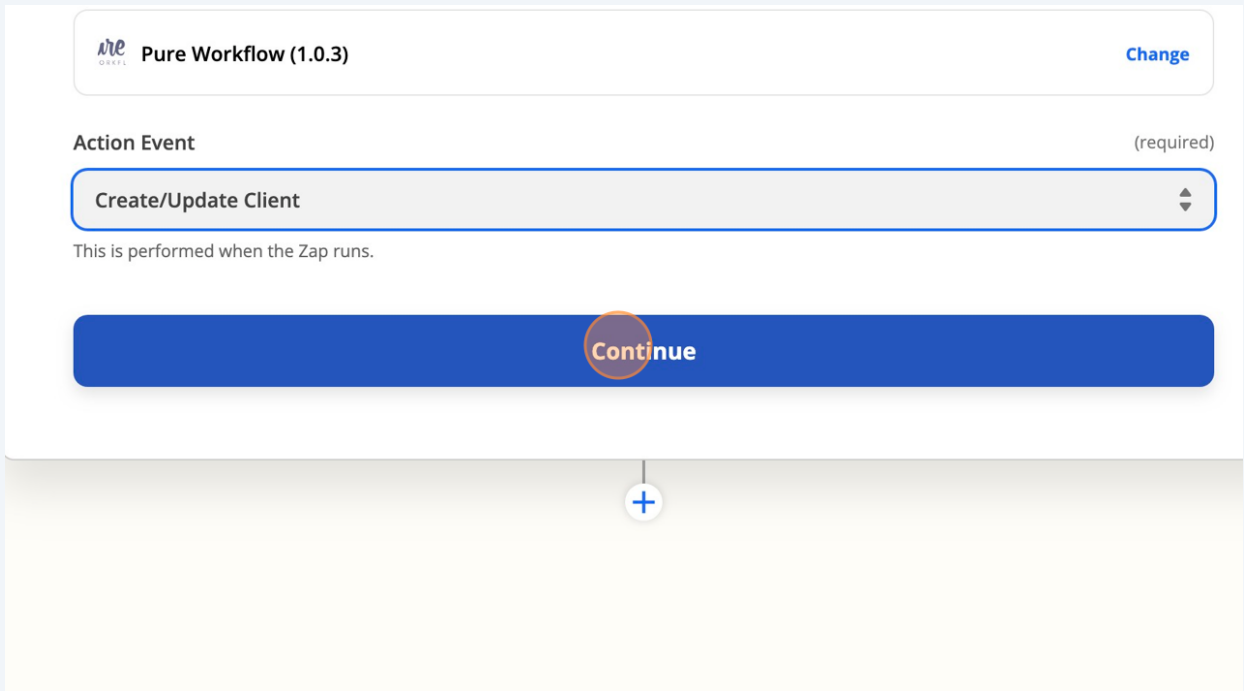
Add/Update Contact to Client
Create or update a contact, based on the contact ID or the contact's email already exis

Add Recurring Task to Client
Creates a recurring task using the default template recurrence settings.

Create/Update Client
Create or update a client, based on the Client ID or the client's name already existing.

Invite New User
Sends an invitation on your behalf to a team member asking them to join a workspace
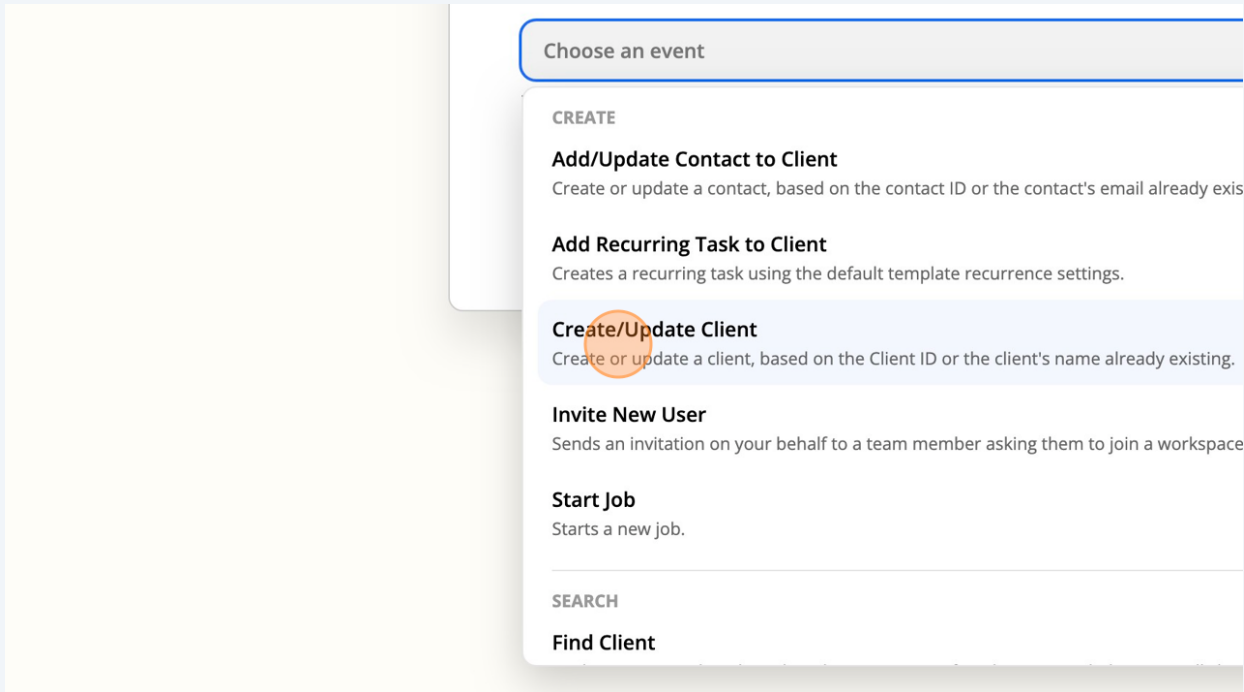
Start Job
Starts a new job.

SEARCH

Find Client

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29 Click "Continue"

Pure Workflow (1.0.3)   **Change**

Action Event   (required)

Create/Update Client   ⬍

This is performed when the Zap runs.

Continue

+

30 Click "Choose an account..."

Action
2. Create/Update Client in Pure Workflow (1.0.3)

? ...

⌄ **Choose app & event**

Choose account

Pure Workflow (1.0.3) account: (required)   Manage connected accounts

🔲 Choose an account...   ⬍

🔒 Pure Workflow (1.0.3) is a secure partner with Zapier. Your credentials are encrypted & can be removed at any time.

To continue, finish required fields

➕

31 Select Pure Workflow App

Choose account

Pure Workflow (1.0.3) account: (required)   Manage

🔲 Choose an account...

Choose...

🔍 Search

⦿ **Pure Workflow (1.0.3)** c5490a7da28142faaf001bb078fd1340
(used in 0 Zaps)

+ Connect a new account

32 Click "Continue"

> ✕ **Choose app & event**
>
> **Choose account**
>
> Pure Workflow (1.0.3) account: (required)   Manage connected accounts
>
> [𝒏𝒓𝒆] Pure Workflow (1.0.3) c5490a7da28142faaf001bb078fd1340   ⬍
>
> 🔒 Pure Workflow (1.0.3) is a secure partner with Zapier. Your credentials are encrypted & can be removed at any time.
>
> **Continue**

33 Map the fields that you wish to integration. Some will be required and must be completed.

> ✕ **Choose app & event**
>
> ✕ **Choose account**
>
> **Set up action**
>
> Name
>
> Enter text or insert data...
>
> If a client already exists on Pure workflow with this name, their data will be updated.
>
> Client ID
>
> Enter text or insert data...
>
> Use the Client ID when you need to update an existing client, including its name.
>
> Client Manager
>
> [𝒏𝒓𝒆] Choose value...
>
> The client manager is required when creating a client.

34 Select a field Click the "Search..." field to find a property from the above zap that you wish to populate. This is an example of populating the first and last name into one Name Field.

Set up action

Name

Enter text or insert data...

Insert Data ...

Q Search...

👤 **1. New or Updated Contact in Google Contacts**

👤 **1. ID** people/c6646410563757901917_2021-11-02T23:59:01.330241Z

👤 **1. Company**

👤 **1. Notes**

Show all options

The client type is required when creating a client

35 Search for "Name" Select "Name First"

Set up action

Name

Enter text or insert data...

Insert Data ...

Q name

👤 **1. Name First** Anette

👤 **1. Name Last** Meandro

👤 **1. Name Middle**

👤 **1. Name Prefix**

👤 **1. Name Suffix**

👤 **1. Photo** https://lh3.googleusercontent.com/cm/ABXenNk3K9pgATFJenc_A35dZZD9

The client type is required when creating a client.

Email

36 Put a space after "Name First" and then Search for "Name" and Select "Name Last"

Name

🔲 1. Name First: Anette

Insert Data ...

🔍 name

🔲 1. Name First Anette
🔲 1. Name Last Meandro
🔲 1. Name Middle
🔲 1. Name Prefix
🔲 1. Name Suffix
🔲 1. Photo https://lh3.googleusercontent.com/cm/ABXenNk3K9pgATFJenc_A35dZZD9ZCmM6

The client type is required when creating a client.

Email

Enter text or insert data...

37 Click "Continue"

Training ⊙ ○

🔲 Choose value...   ⇕

WSIB/WCB Number

Enter text or insert data...

Year end date 📅🕐

Enter text or insert data...

↻ **Refresh fields**

Continue

➕

38   Click "Test & Continue"

: empty (optional)

: empty (optional)

tional)

ptional)

mpty (optional)

y (optional)

etails: empty (optional)

ptional)

Review: empty (optional)

Software: empty (optional)

e Number: empty (optional)

D): empty (optional)

Test & Review   Test & Continue

+

39   Click "Turn on Zap"

urebk.com

action   Turn on Zap

Close

Ready to turn your Zap on?   OFF   ×