

Zapier

What is Zapier?

Zapier is a tool for users to connect AdviserLogic with various web applications. Example: You want to add a new client's contact details in Office 365 contacts, whenever a new client is added in your AdviserLogic account.

You can create a Zap between AdviserLogic and Office 365. All you need to do is set up the Trigger and the Action, and Zapier does the rest for you.

This is just one of the endless scenarios made possible by this integration, so that you can focus on other more important tasks.

What is a Zap?

An integration between two applications is called a Zap. It is very lightweight and easy to set up. It doesn't import or export old data (it only operates on new items created after the Zap is enabled).

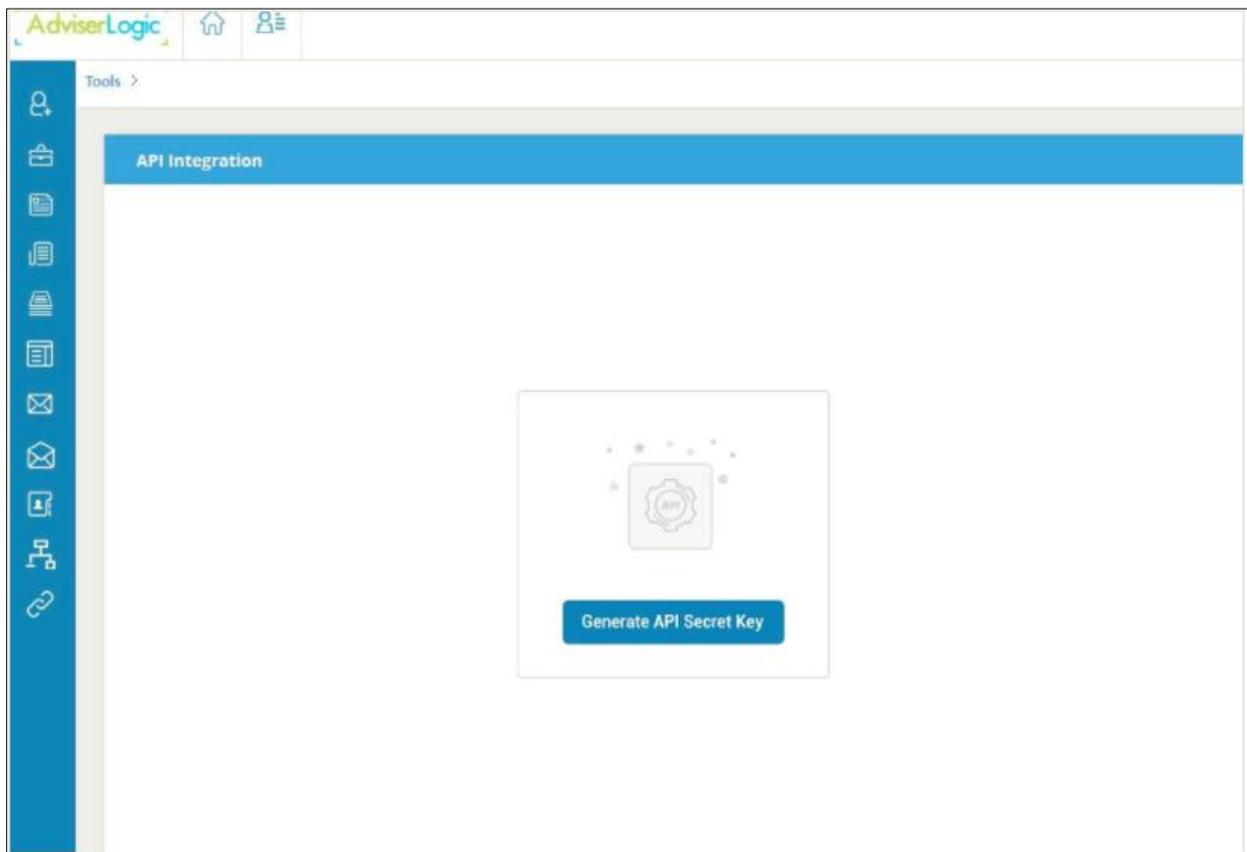
Zap is deceptively simple if you're used to dealing with complex and difficult integrations. Its simplicity is what enables anyone to create it.

It is one-way integration between application so should not be considered a sync setup.

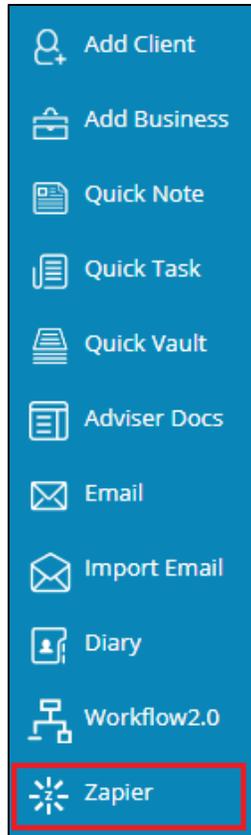
Getting started with AdviserLogic on Zapier

Please follow below steps to use this feature:

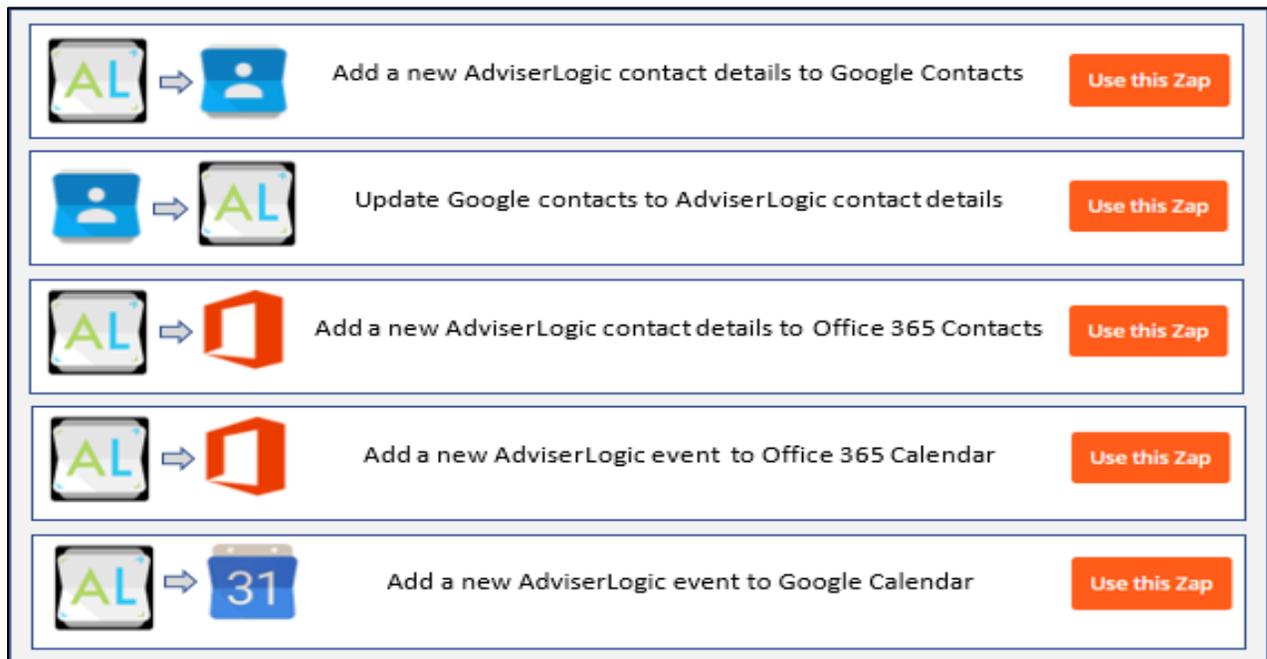
- 1) Login to AdviserLogic application using your username and password.
- 2) Go to **Tools > API Integration > Generate API Secret Key**. to get your Encrypted API access Key and Password. This will be used in step 10.



- 3) Once you have generated API keys, select "Zapier" from the left navigation panel as shown below. (If you do not see it, ask support- support@adviserlogic.com to enable Zapier for you)



4) Once you have clicked the above link, the below window (AdviserLogic Zaps) will open.



These are predefined Zap templates. You can choose from this list of pre-defined zaps and start automating instantly.

- 5) Click on “Use this Zap” Corresponding to the zap that you want to use (ADL contact details to Google Contacts). It will redirect you to the below page.

Add new AdviserLogic client contacts to Google Contacts

Rather than dealing with importing clients and contacts, use Zapier to do that admin work for you. Once you set up this Zapier integration, whenever you add a new client in AdviserLogic, Zapier will add the contact to Google Contacts so you'll have a backup and can contact them easily on the go.

Note: This Zapier integration doesn't import existing contacts to Google Contacts—only new contacts added after you've set up the integration will be added.

How it Works

1. A new client contact is created on Adviserlogic
2. Zapier creates a contact in Google Contact

What You Need

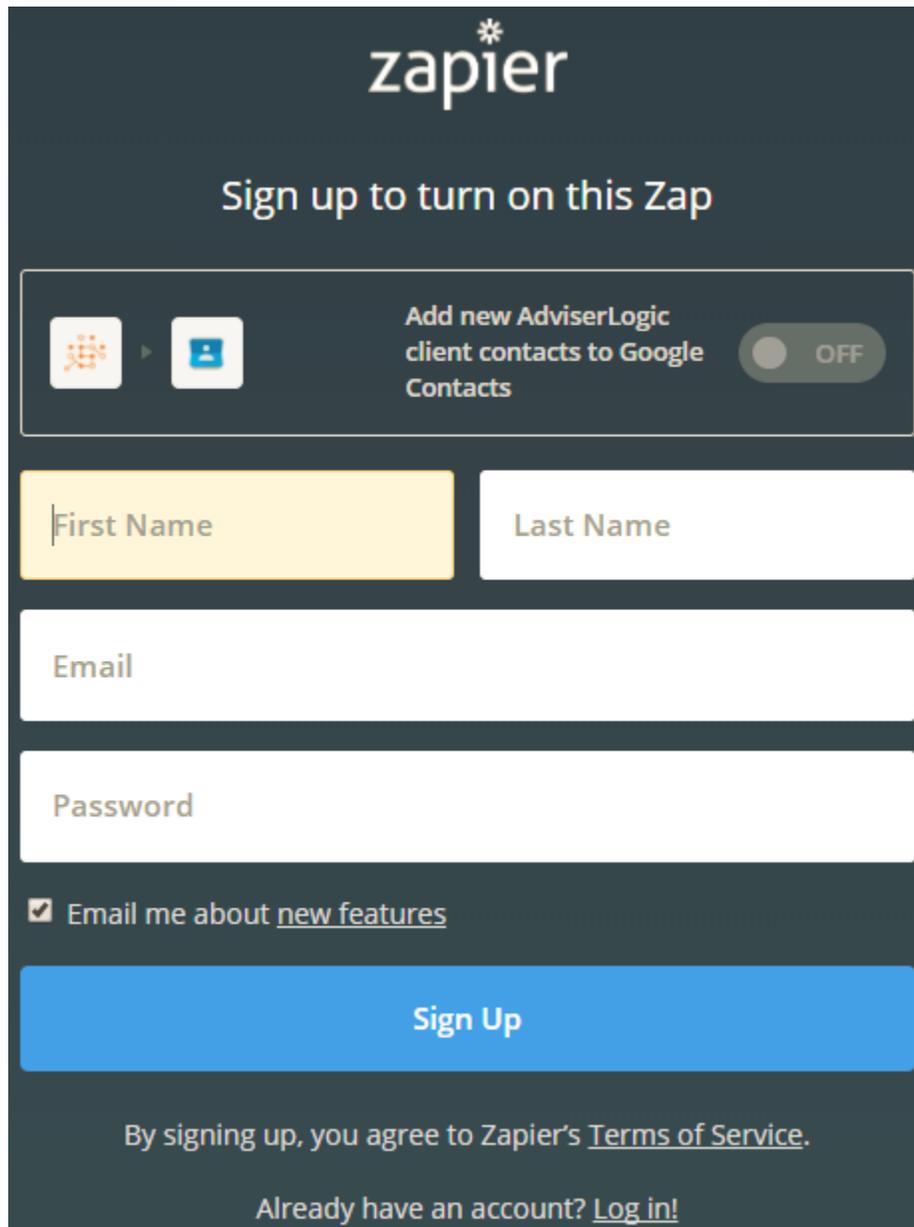
Adviserlogic Account

Google Account

Create this Zap

Want to do something else? Explore [other Zaps!](#)

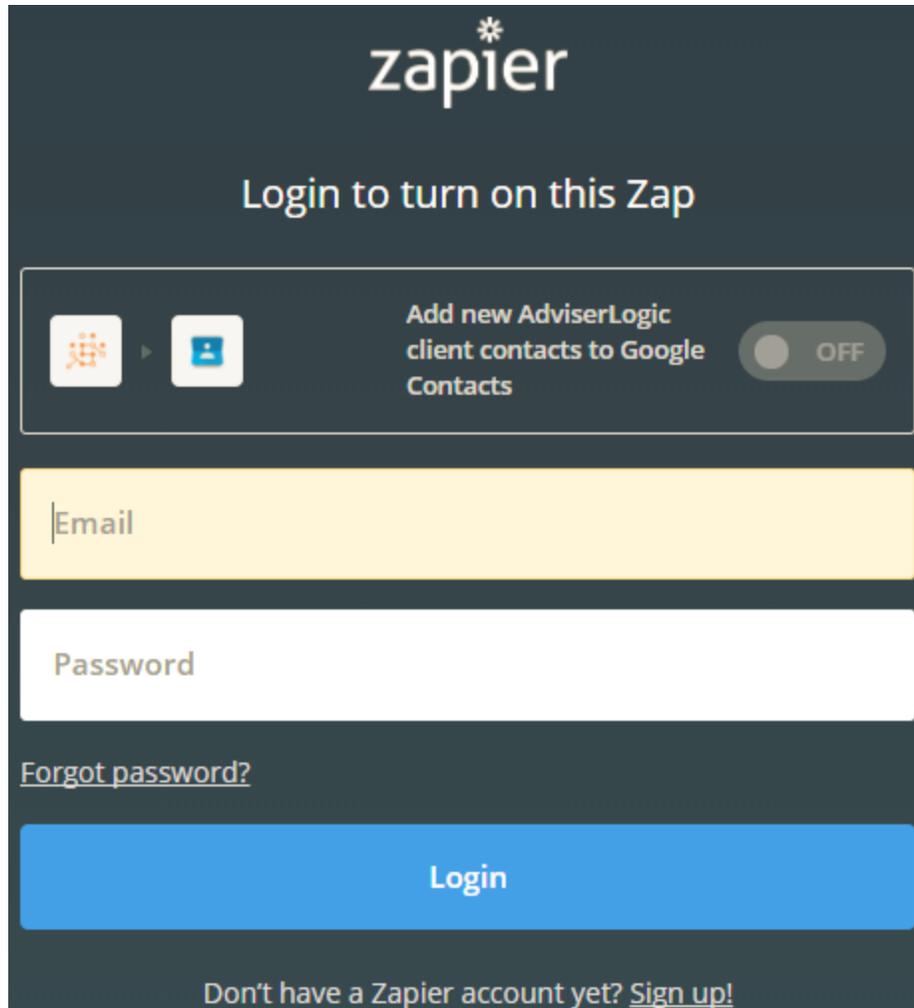
6) Click on Create this Zap. Below window will open.



The image shows a Zapier sign-up window with a dark blue background. At the top, the Zapier logo is displayed. Below it, the text "Sign up to turn on this Zap" is centered. A section contains two icons (AdviserLogic and Google) with the text "Add new AdviserLogic client contacts to Google Contacts" and a toggle switch set to "OFF". Below this are input fields for "First Name" and "Last Name", followed by "Email" and "Password" fields. A checkbox labeled "Email me about new features" is checked. A large blue "Sign Up" button is at the bottom. Below the button, it says "By signing up, you agree to Zapier's [Terms of Service](#)." and "Already have an account? [Log in!](#)"

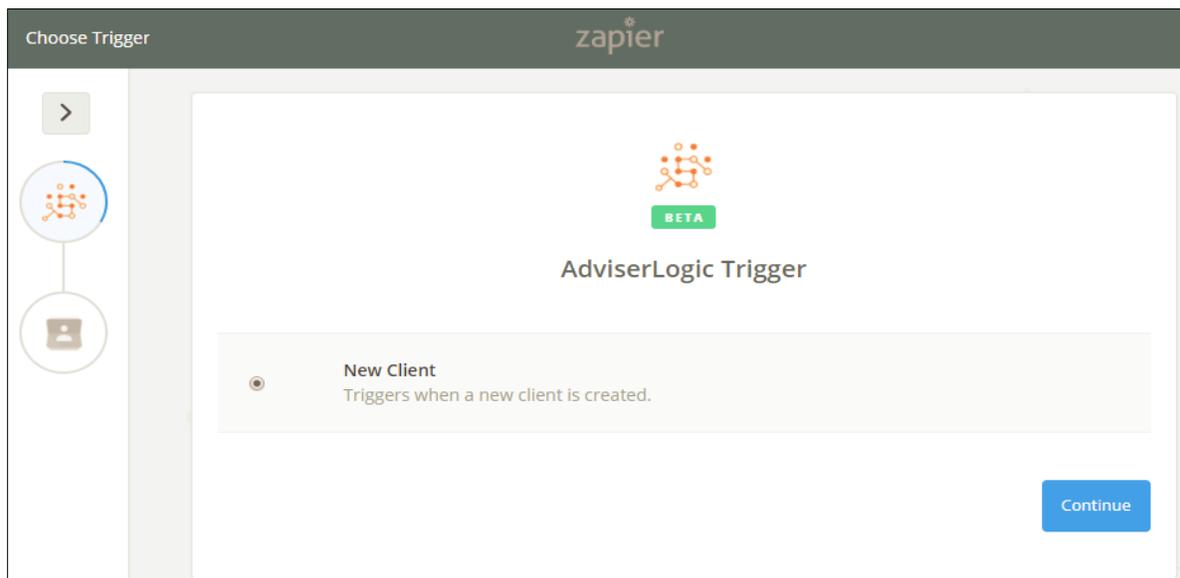
7) First time users will need to sign up. Enter your First Name and Last Name, your Email Address (any) and set up a password. Click on Sign Up.

Note: If you already have Zapier account, simply login using your existing Email Address and Password.



The image shows the Zapier login interface. At the top, the Zapier logo is displayed. Below it, the text "Login to turn on this Zap" is centered. A toggle switch is visible, labeled "Add new AdviserLogic client contacts to Google Contacts" and currently set to "OFF". Below the toggle are two input fields: "Email" and "Password". A link for "Forgot password?" is located below the password field. A large blue "Login" button is positioned below the input fields. At the bottom, there is a link that says "Don't have a Zapier account yet? Sign up!".

8) Once you login or sign up on Zapier, you will be redirected to the below screen.

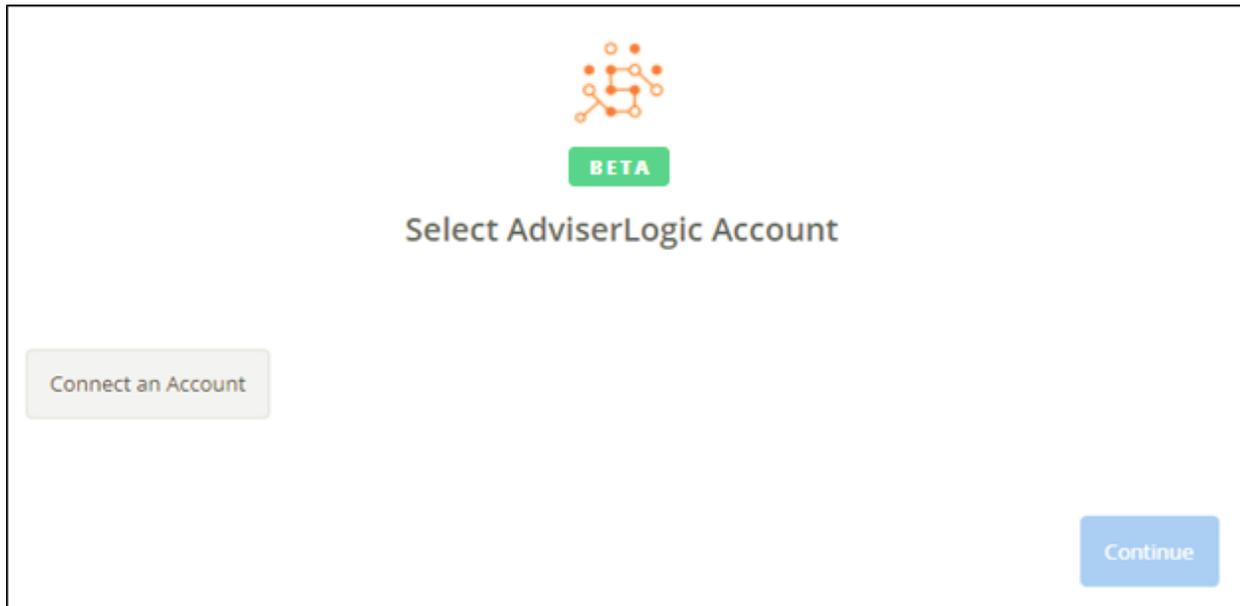


The image shows the Zapier trigger selection screen. The header includes "Choose Trigger" and the Zapier logo. On the left, there is a sidebar with a navigation arrow and two circular icons: the top one is the Zapier logo and the bottom one is a person icon. The main content area features the AdviserLogic logo with a "BETA" badge. Below the logo, the text "AdviserLogic Trigger" is displayed. A list of triggers is shown, with "New Client" selected, indicated by a radio button. The description for "New Client" is "Triggers when a new client is created." A blue "Continue" button is located at the bottom right of the main content area.

In the above screen, we have set-up Trigger and Action for you to use. Click on Continue.

- 9) You need to connect to your Source and Destination account. (Here the Source or Trigger Account will be your AdviserLogic account and the Destination or Action account will be your Google account)

Click on "Connect an Account" to enter your AdviserLogic's Account Details.



- 10) The below screen will appear where you need to enter an Encrypted API Access Key and Password generated in step 2, along with your AdviserLogic Email Address (which is your Username).



Allow Zapier to access your AdviserLogic Account?

Encrypted API Access Key *(required)*

Go to the Tools > API Integration > Generate API Secret Key screen from your [AdviserLogic Dashboard](#) to find your credentials.

Encrypted API Access Password *(required)*

Email ID *(required)*

This is the email id you use to login AdviserLogic account.

Yes, Continue **Cancel**

- 11) Once you have entered the details on Zapier's AdviserLogic authentication page, you need to click on Continue, the account will be connected if the details are correct. Click on Save & Continue.



BETA

Select AdviserLogic Account

PRIVATE Updated: 2017/11/16

AdviserLogic demo@adviserlogic.com on A... demo@adviserlogic.com on Advi... Test

Connect an Account

Save + Continue

If the details are entered wrong, the below screen with error will pop up:



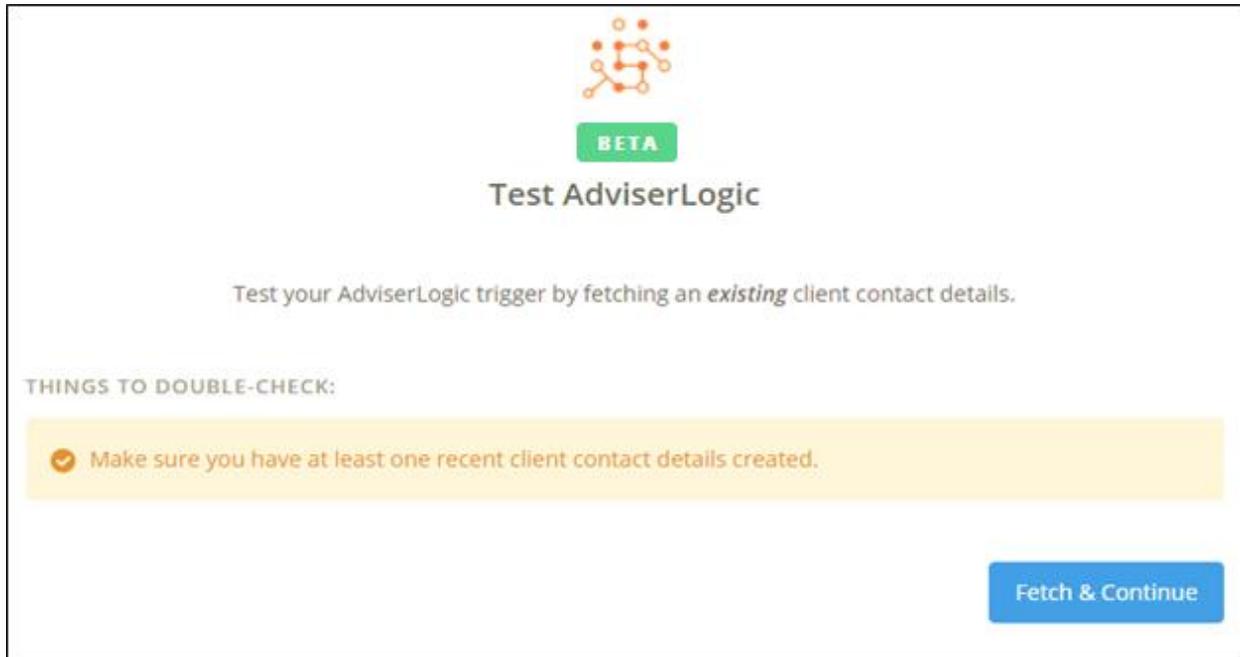
We hit an error adding your new account

authentication failed: openapi.adviserlogic.com returned (400) Bad Request and said "Blank or Invalid User ID Supplied"

1. Make sure you click "Allow" or "Accept" on the permission popup
2. Double check your Account has the correct permissions
3. Check out our [help docs](#) for more information

- You can check any spaces before or after Encrypted API Key and Encrypted API Password.
- The email used must be the same which has been used to login to AdviserLogic and generate keys.

12) Once the account has been added successfully, the next step is to test the trigger. Click on Fetch & Continue button.




BETA

Test AdviserLogic

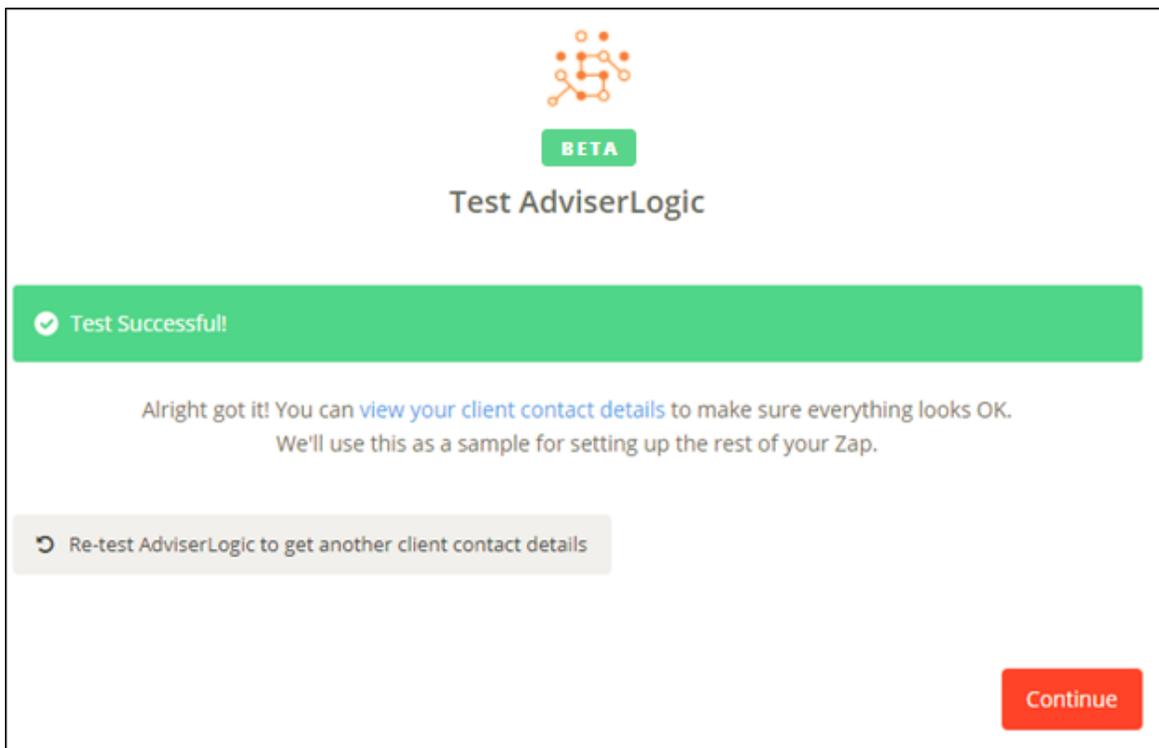
Test your AdviserLogic trigger by fetching an *existing* client contact details.

THINGS TO DOUBLE-CHECK:

- ✓ Make sure you have at least one recent client contact details created.

Fetch & Continue

13) In this example you need to have at least one client with its contact details completed in AdviserLogic for this test to be successful.




BETA

Test AdviserLogic

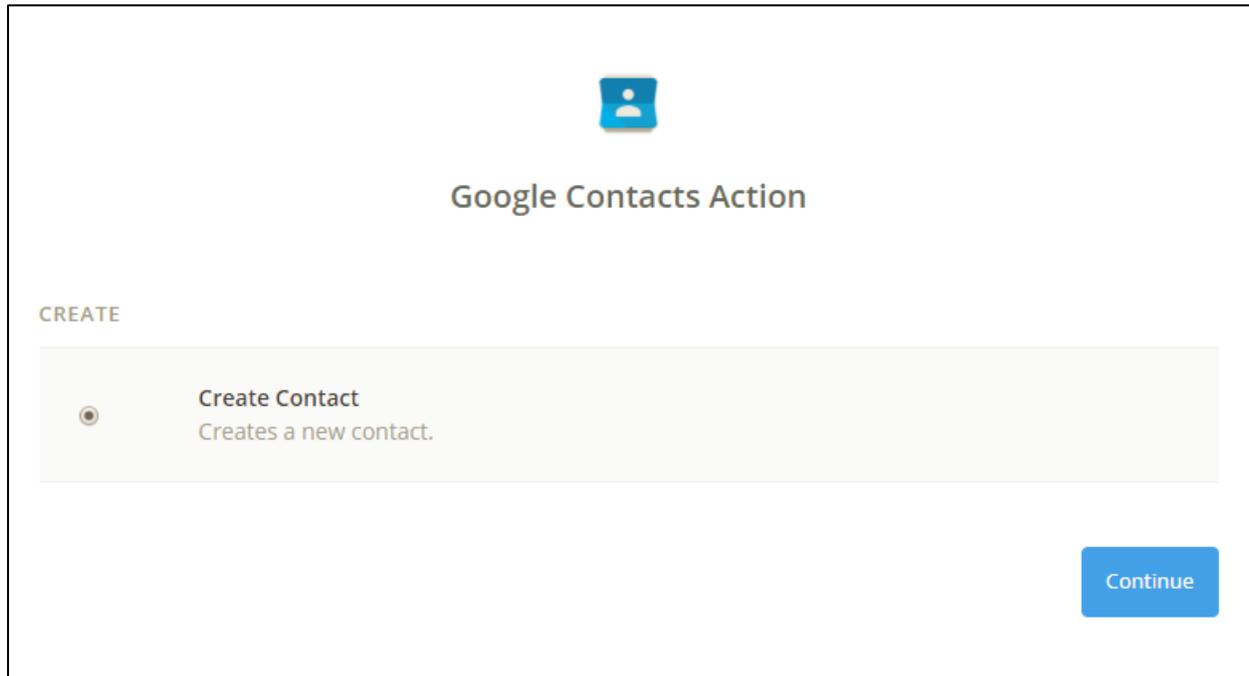
✓ Test Successful!

Alright got it! You can [view your client contact details](#) to make sure everything looks OK.
We'll use this as a sample for setting up the rest of your Zap.

↻ Re-test AdviserLogic to get another client contact details

Continue

- 14) The above step completes the 'Trigger' part of the Zap process. Let's move on to 'Action' setup.
15) Clicking on the Continue button on the screen shown above will take you to the below screen.





Google Contacts Action

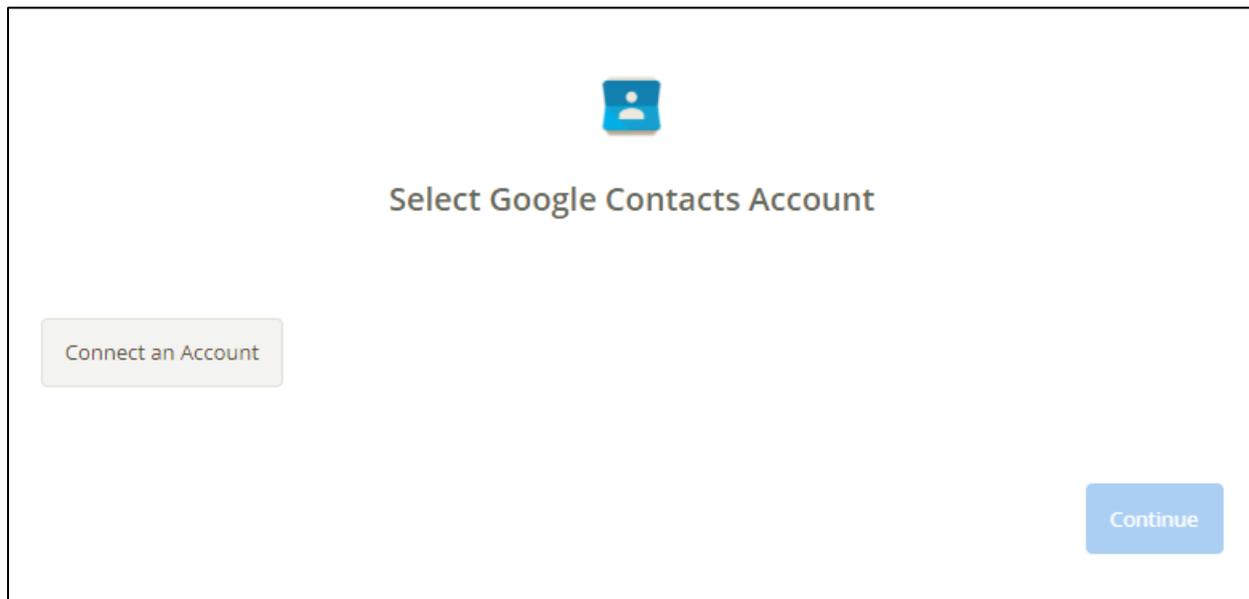
CREATE

Create Contact

Creates a new contact.

Continue

- 16) Click on Continue and Connect to a Google account. Click on 'Connect an Account'.



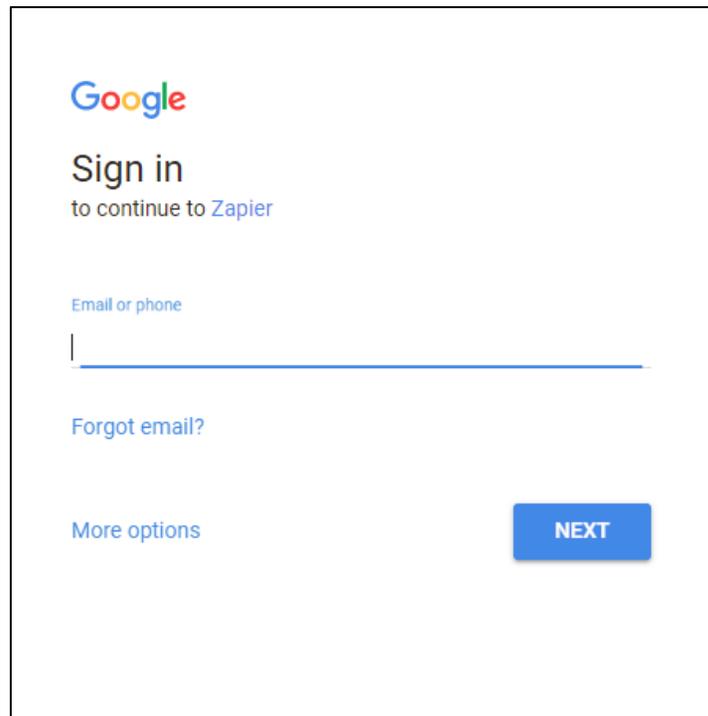


Select Google Contacts Account

Connect an Account

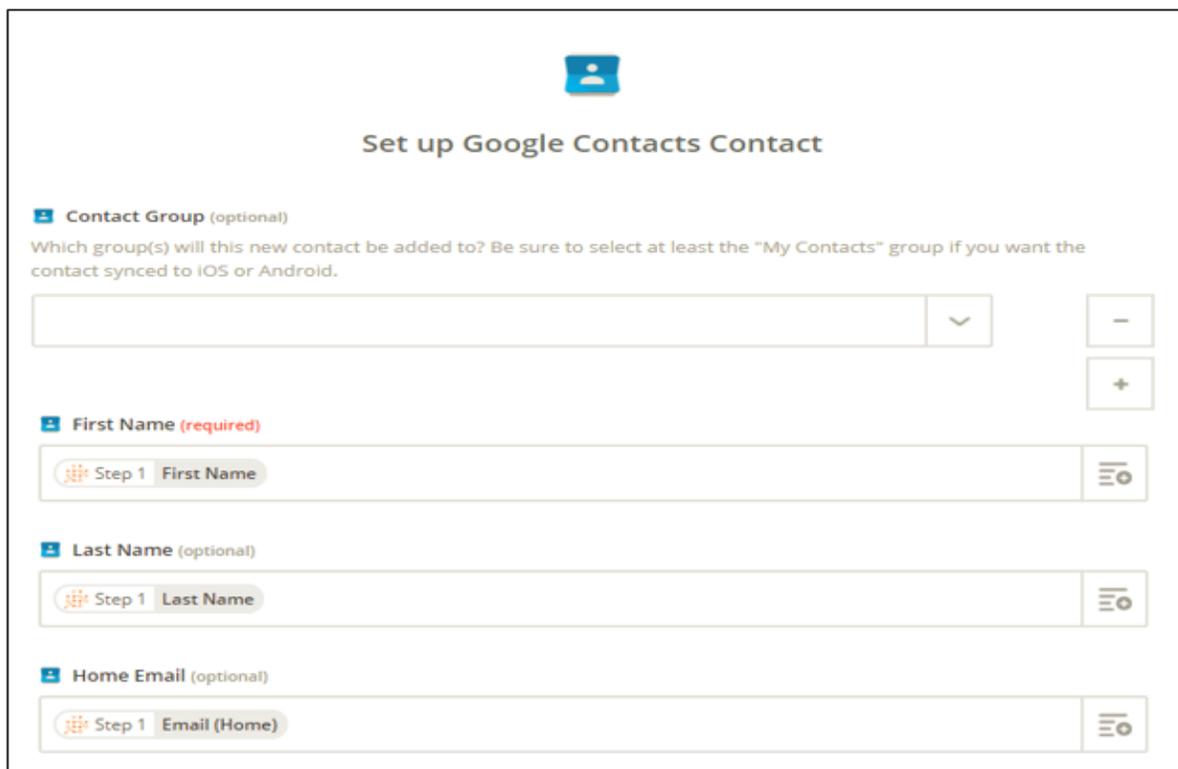
Continue

17) Enter Email Address/Phone and Password (Google Account) in below window.



The image shows a Google sign-in window. At the top is the Google logo. Below it, the text reads "Sign in to continue to Zapier". There is a text input field labeled "Email or phone" with a blue underline. Below the input field are two links: "Forgot email?" and "More options". At the bottom right is a blue button labeled "NEXT".

18) Once your Google Account is connected, you will be redirected to the below screen.



The image shows a "Set up Google Contacts Contact" screen. At the top center is a blue person icon. Below it is the title "Set up Google Contacts Contact". The screen contains several form fields:

- Contact Group (optional)**: A dropdown menu with a downward arrow and minus/plus buttons to the right. Below the dropdown is a plus button.
- First Name (required)**: A text input field with a "Step 1" label and a "First Name" label. To the right is a settings icon.
- Last Name (optional)**: A text input field with a "Step 1" label and a "Last Name" label. To the right is a settings icon.
- Home Email (optional)**: A text input field with a "Step 1" label and an "Email (Home)" label. To the right is a settings icon.

The mapping is already done here. Please do not change the mapping.

19) Click on Continue and the below screen will appear.



Test Google Contacts

 Test Successful!

Alright got it! You can [view your contact](#) to make sure everything looks OK.
We'll use this as a sample for setting up the rest of your Zap.

 Re-test Google Contacts to get another contact

Add a step

or

Finish

20) Click on Finish. Your Zap is ready to be used.



Awesome! Your Zap is working.

YOUR ZAP IS ON

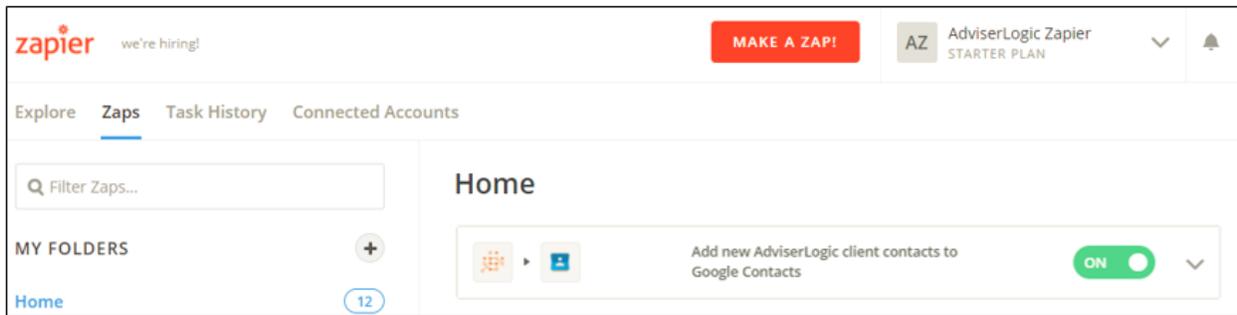
While on, this Zap will automagically check for your
AdviserLogic Get Client's Contact Details every  5 minutes.

See it on your Dashboard

or

Make another Zap

21) You can see the created Zap on your Dashboard.



This zap will automatically run every 5 minutes for paid Zapier account and every 15 minutes for free account. In this example it will pull the trigger (AdviserLogic) for new changes and will update it in Action (Google Contacts).