# Learning Path: Accounting Automation

## 3-Month Structured Learning Plan

**Version:** 1.0.0  
**Created:** October 21, 2025  
**Purpose:** Step-by-step guide to mastering accounting automation

## Month 1: Core Accounting Zaps

### Week 1-2: Foundation (Build these 5)

**Day 1-2: ZAP #1 - Invoice Email → Spreadsheet** - Set up Gmail trigger for invoice emails - Extract attachment - Save to Google Drive - Create row in spreadsheet - Send notification - **Practice with:** Your own email (star messages to trigger)

**Day 3-4: ZAP #2 - Receipt Photo → Expense Tracker** - Mobile app trigger (or email) - OCR to read receipt - Save image to Drive - Log to spreadsheet - **Practice with:** Your own receipts

**Day 5-6: ZAP #3 - Payment Received → Update Systems** - Payment platform trigger (Stripe/PayPal) - Mark invoice paid - Update spreadsheet - Send thank you email - **Practice with:** Test payment accounts

**Day 7-8: ZAP #4 - Bill Due → Payment Reminder** - Scheduled trigger (daily check) - Filter for upcoming due dates - Send notification - Create task - **Practice with:** Sample bill tracker

**Day 9-10: ZAP #5 - Bank Transaction → Auto-categorize** - Bank connection - Pattern recognition - Categorize transaction - Log to spreadsheet - **Practice with:** Personal checking account

### Week 3-4: Add Complexity

**Day 11-13: Connect to QuickBooks/Xero** - Set up test account (free trials available) - Integrate Zaps to create invoices - Create bills - Record payments - **Practice with:** Fictional business data

**Day 14-16: Approval Workflows** - Add conditional logic - “If amount > $500, send for approval” - Multiple paths based on conditions - **Practice with:** Expense approval scenario

**Day 17-19: Multi-Step Processing** - Chain multiple actions - 5-10 step Zaps - Error handling - **Practice with:** Complete invoice-to-payment workflow

**Day 20-21: Monthly Report Generation** - Scheduled trigger (end of month) - Pull data from multiple sources - Calculate metrics - Generate formatted report - **Practice with:** Your own financial data

### Week 5: Document & Refine

**Day 22-24: Documentation** - Screenshot each Zap - Write explanations - Create “before/after” comparisons - Calculate time savings

**Day 25-27: Testing & Refinement** - Test error scenarios - What if data is missing? - What if amount format is different? - Add error handling

**Day 28-30: Portfolio Piece #1** - Create case study format - “Personal Accounting Automation System” - Show all 10+ Zaps working together - Calculate your own time savings

## Month 2: Construction-Specific Focus

### Week 1-2: Project Cost Tracking

**Build these Zaps:** - Expense → Allocate to job number - Time tracking → Project costing - Material purchase → Project budget update - Budget alert when >85% used

**Practice scenario:**  
Create fictional construction project with: - 3 employees tracking time - 5 material purchases - 2 subcontractor invoices - Running budget tracker

### Week 3-4: Subcontractor Management

**Build these Zaps:** - Sub invoice → Process + retention calculation - Insurance expiration → Alert - Lien waiver → Track and remind - Retention release at project completion

**Practice scenario:**  
Manage 5 fictional subcontractors through complete project lifecycle

## Month 3: Complete System & Portfolio

### Week 1-2: Integration

**Connect everything:** - All 15 Zaps working together - Complete accounting system - Test with realistic data volume - 50+ transactions per week

### Week 3: Case Study Development

**Create comprehensive portfolio piece:**

**“Complete Construction Accounting Automation System”**

Document: - Before state (manual processes) - After state (automated processes) - Each automation explained - Screenshots/diagrams - Time savings calculated - Cost savings calculated - ROI analysis

### Week 4: Prepare for Clients

**Deliverables:** - Portfolio website/Notion page - Case study PDF - Demo video (5-10 minutes) - Pricing sheet - Service descriptions

**You’re now ready to pitch:** - Construction companies - Service businesses - Any company with accounting pain

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**Created:** October 21, 2025  
**Part of:** Accounting Automation Guide Series