# Tools & Resources for Accounting Automation

## Complete Software and Learning Resource Guide

**Version:** 1.0.0  
**Created:** October 21, 2025  
**Purpose:** Everything you need to learn and implement accounting automation

## Required Software

### Automation Platform

**Zapier** (Primary recommendation) - Free tier: 5 Zaps, 100 tasks/month (good for learning) - Starter: $20/month - 20 Zaps, 750 tasks/month - Professional: $50/month - Unlimited Zaps, 2,000 tasks/month - Website: zapier.com

**Alternative: Make (formerly Integromat)** - Free tier: 1,000 operations/month - Different interface, steeper learning curve - More powerful for complex scenarios - Website: make.com

### Accounting Software

**QuickBooks Online** (Most common) - Simple Start: $30/month - Most small businesses use this - Best integration support - Website: quickbooks.intuit.com

**Xero** (Popular alternative) - Starter: $15/month - Growing in popularity - Beautiful interface - Website: xero.com

**Wave** (Free option) - $0 for accounting (great for learning!) - Charges for payment processing - Limited features vs. QB/Xero - Website: waveapps.com

### Data Storage/Databases

**Google Sheets** (Free) - Everyone knows how to use it - Real-time collaboration - Integrates with everything - Great for practice

**Airtable** (Spreadsheet-database hybrid) - Free tier: Generous - More powerful than sheets - Better for complex projects - Website: airtable.com

### File Storage

**Google Drive** (Free 15GB) - Document storage - Receipt images - Generated reports - Website: drive.google.com

### Payment Processing

**Stripe** (For receiving payments) - Test mode for practice - Easy integration - Professional - Website: stripe.com

**PayPal** (Alternative) - More universally known - Easier for some clients - Website: paypal.com

## Learning Resources

### Official Zapier Training

**Zapier University** (Free) - zapier.com/learn - Start here - Video tutorials - Hands-on exercises

**Zapier Blog** (Free) - zapier.com/blog - Use cases and inspiration - Best practices

### Accounting Automation Specific

**QuickBooks API Documentation** - developer.intuit.com - Technical details - Integration guides

**Xero Developer Center** - developer.xero.com - API documentation - Sample code

### Construction Industry Knowledge

**Construction Financial Management Association (CFMA)** - cfma.org - Industry best practices - Job costing standards - Financial benchmarks

**Books:** - “Contractor’s Guide to QuickBooks” by Craig Kershaw - “Construction Accounting & Financial Management” by Steven J. Peterson

### Communities

**Automation Hangout** (Slack community) - automationhangout.com - Active community - Get help with Zaps - Share wins

**Zapier Community Forum** - community.zapier.com - Official support - Browse solved problems

**Reddit** - r/zapier - Zapier specific - r/nocode - Broader automation - r/smallbusiness - Client perspective - r/Construction - Industry insights

## Practice Tools

### Sample Data Generators

**Mockaroo** (mockaroo.com) - Generate realistic fake data - Great for testing at scale - Free tier available

**Invoice Generator** (invoice-generator.com) - Create sample invoices - Practice invoice processing Zaps

### Testing Email

**Temp Mail** (temp-mail.org) - Temporary email addresses - Test email triggers - Free

### Free Bank Account for Testing

**Most banks offer:** - Free business checking - API access (for automation) - Use for practice, real data

## Documentation Tools

### For Your Portfolio

**Notion** (notion.so) - Build portfolio website - Document your processes - Free personal plan

**Loom** (loom.com) - Record screen + webcam - Demo videos for clients - Free tier: 25 videos

**Canva** (canva.com) - Create diagrams - Visual explanations - Free tier generous

## Cost Summary

### Essential Tools (For Learning)

Zapier Free: $0/month  
Wave Accounting: $0/month  
Google Drive: $0/month  
Google Sheets: $0/month  
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Total: $0/month

### Professional Setup (For Clients)

Zapier Professional: $50/month ($600/year)  
QuickBooks Online: $30-80/month ($360-960/year)  
Airtable Plus: $20/month ($240/year)  
Google Workspace: $12/month ($144/year)  
Other tools: ~$500/year  
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Total: ~$1,100-2,300/year

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