
AGENTIC AI SESSION · CLASSROOM 1

Agentic AI: Zapier

Governed Automation Across Your Practice Stack

Agentic AI: Zapier — with a touch on n8n & Make.com

AI SUMMIT- ICAI-EIRC

Saturday, 18 July 2026 | 2:00 PM – 3:30 PM | Classroom 1

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AGENDA

What we'll cover today

01 What Zapier actually is today — it's moved past "if this, then that"

02 What's already built for accounting workflows

03 Where this fits into a CA practice

04 Getting started yourself

SETTING CONTEXT

The practice reality

The same routine work repeats across every client — reconciliations, follow-ups, deadline checks. It doesn't have to sit on your desk.



MANUAL TODAY

Chasing follow-ups, re-keying data across sheets, tracking deadlines by memory



AUTOMATED WITH ZAPIER

Zaps handle the repetition, AI steps handle judgment calls, Guardrails keep it safe

INTRODUCING ZAPIER

What is Zapier?

A cloud-based automation platform connecting Gmail, Google Sheets, Slack, accounting software, and more.

No installation, no server, no command line.

You describe what you want, or build visually — Zapier handles the plumbing between apps.



10,000+

connected apps

EVOLUTION

From "if this, then that" to AI teammates

Click a tab to explore each capability.

- Zaps
- ◆ AI Step
- ✦ Copilot
- ▲ Agents
- AI Guardrails

Zaps

Classic trigger → action automation — still the foundation.

AT A GLANCE

Zaps vs. Agents

	→ Zaps	▲ Agents
Trigger model	Event-driven — "when X happens"	Goal-driven, works continuously
Best at	Repetitive, well-defined tasks	Judgment calls across messy context
Setup	Visual builder, or describe it to Copilot	Describe an objective; it plans the steps
Oversight	You define every step	Guardrails scan every output

ALREADY BUILT

Built for accounting already

Direct, pre-built integrations with the accounting software CAs actually use — existing, documented triggers and actions, not hypotheticals.



QuickBooks Online

Auto-create invoices when a sale happens, sync expenses from receipt apps, keep customer/vendor records in sync



Xero

Trigger on new credit notes, track invoice status changes, auto-create inventory items



Zoho Books

Cloud accounting automation, widely used across Indian SMEs

ALREADY BUILT

Real workflows already in use by accountants



Invoice-to-cash

New sale in a CRM or e-commerce platform → invoice auto-created in QuickBooks/Xero



Expense capture

Receipt apps and card processors → expenses logged automatically, no manual entry



Revenue recognition

Stripe or QuickBooks payment events → recognition schedule updated, logged for audit review



Client onboarding

New client signed → accounting tasks auto-created in your project tracker, nothing missed

A ready-made template library exists for most of these — you're rarely starting from a blank page.

Where this fits in a CA practice



Client follow-ups

Routine updates and reminders, sent automatically



Deadline tracking

GST / ROC / TDS monitoring across multiple clients



Document intake

First-pass extraction from invoices, statements, forms



Multi-app reporting

Pulling data together across the tools you already use



Direct accounting integration

QuickBooks, Xero, Zoho Books — no middleware required

Using this responsibly

Zapier's own documentation is candid that Agents are still early-stage for production-critical, customer-facing work

Keep a human review step for anything client-facing until you've built confidence in a given workflow

Guardrails reduce risk — they don't eliminate the need for judgment

Confidentiality obligations under the ICAI Code of Conduct apply here exactly as they do to any other system

NEXT STEPS

Getting started yourself

1

Create a free Zapier account

2

Look at the accounting automation template library before building from scratch

3

Try Copilot on one small, low-stakes task before automating anything client-facing

RESOURCES

Where to go next



ZAPIER

zapier.com



ZAPIER AGENTS

zapier.com/agents



ACCOUNTING TEMPLATES

zapier.com/automations/finance/accounting

Thank You

Questions?

Abhishek Agarwal





*Thank
you*



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Let's Connect!

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