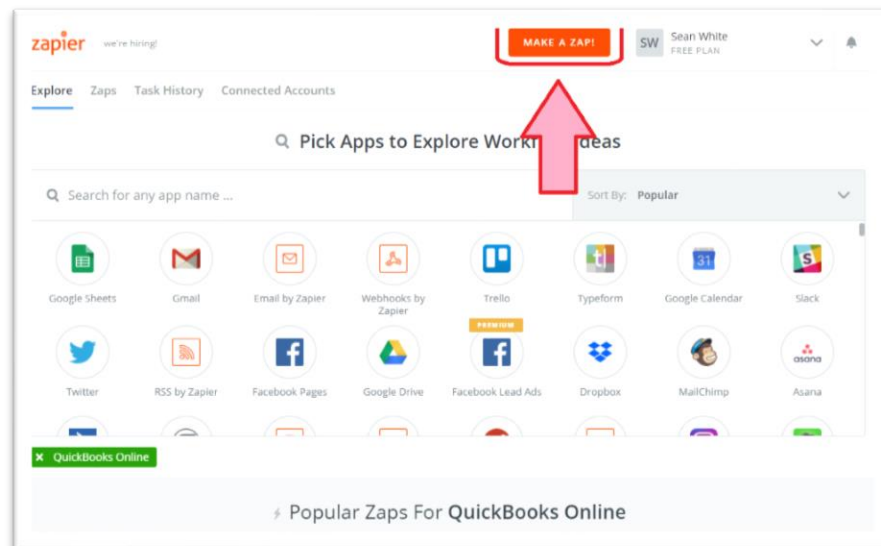


Integrate LoyaltyLoop and QuickBooks Online with Zapier

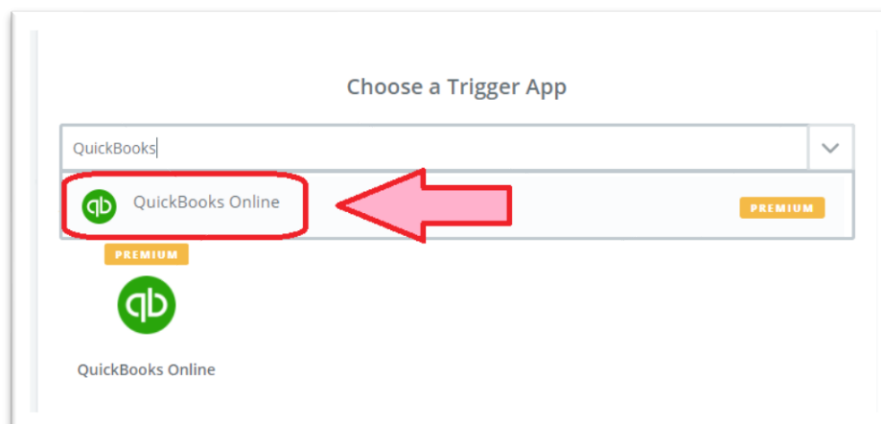
1. Login to your Zapier account.

If you do not have an account, please create one before proceeding to step two.

2. Click "Make a Zap!" on the top of the screen.

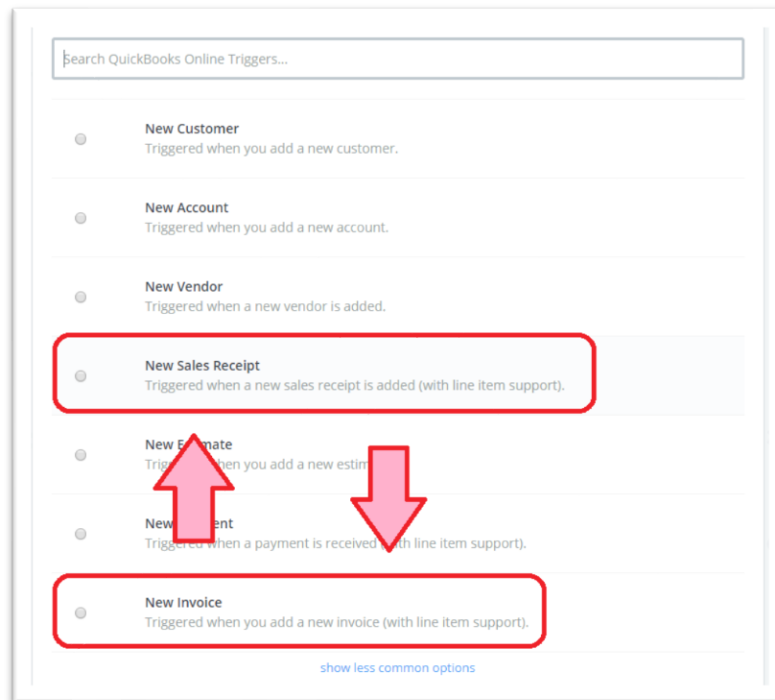


3. Select QuickBooks Online for your Trigger.

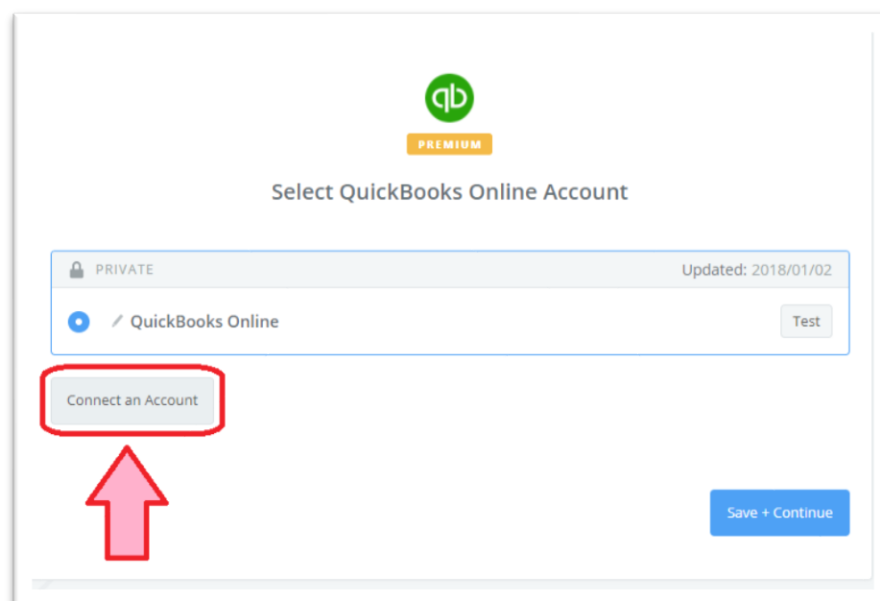


4. Select “New Sales Receipt” or “New Invoice”.

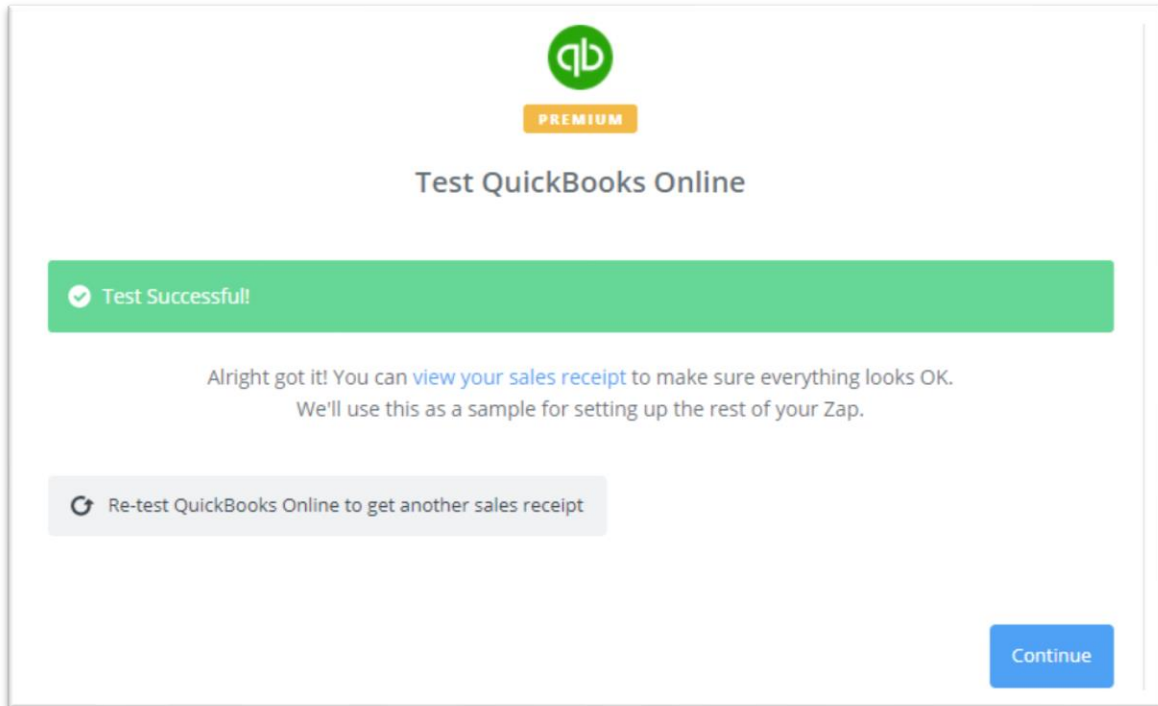
Please select the right option for your company and workflow.



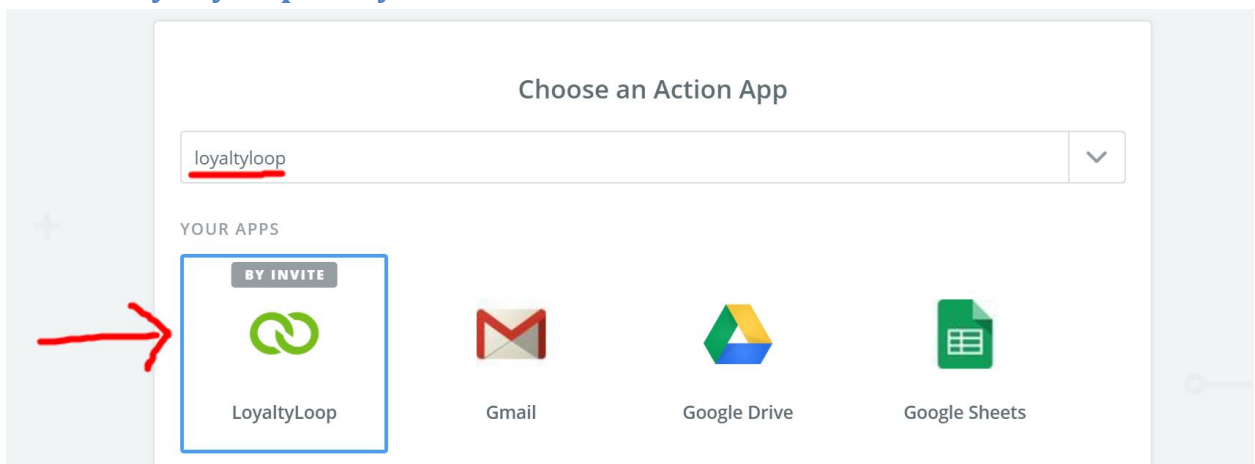
5. Select/Connect your QuickBooks account



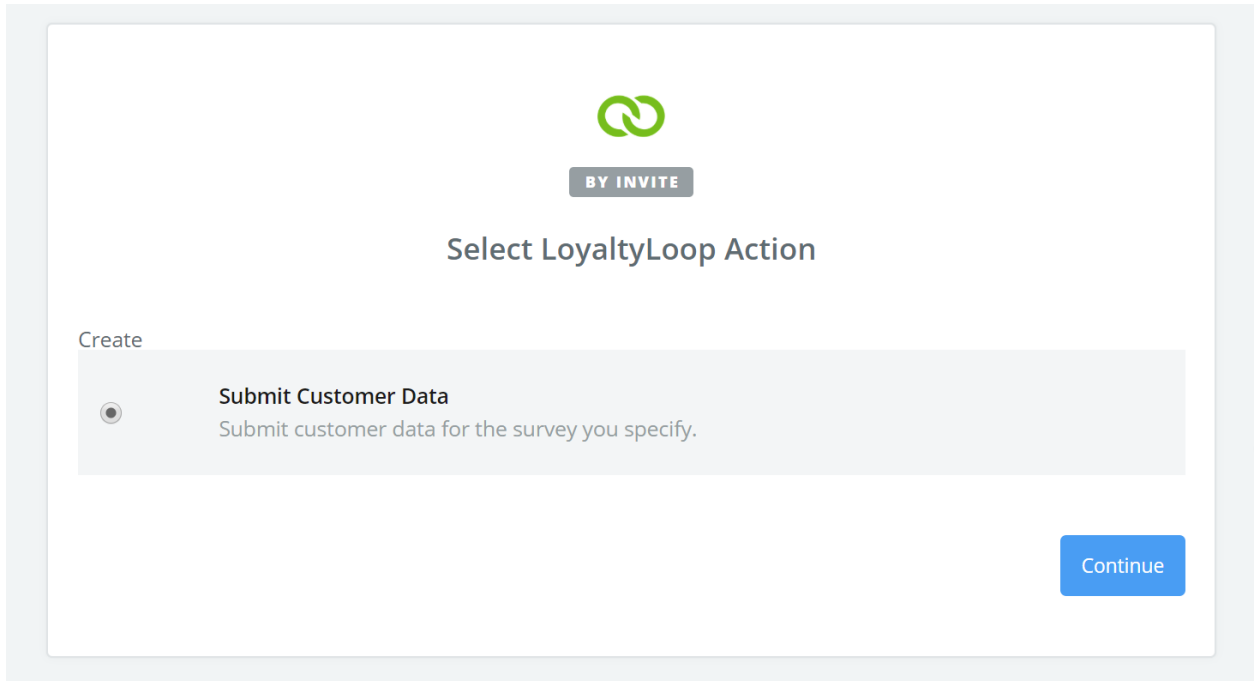
6. Click "Continue".




7. Select "loyaltyloop" for your Action



8. Select "Submit Customer Data"





BY INVITE

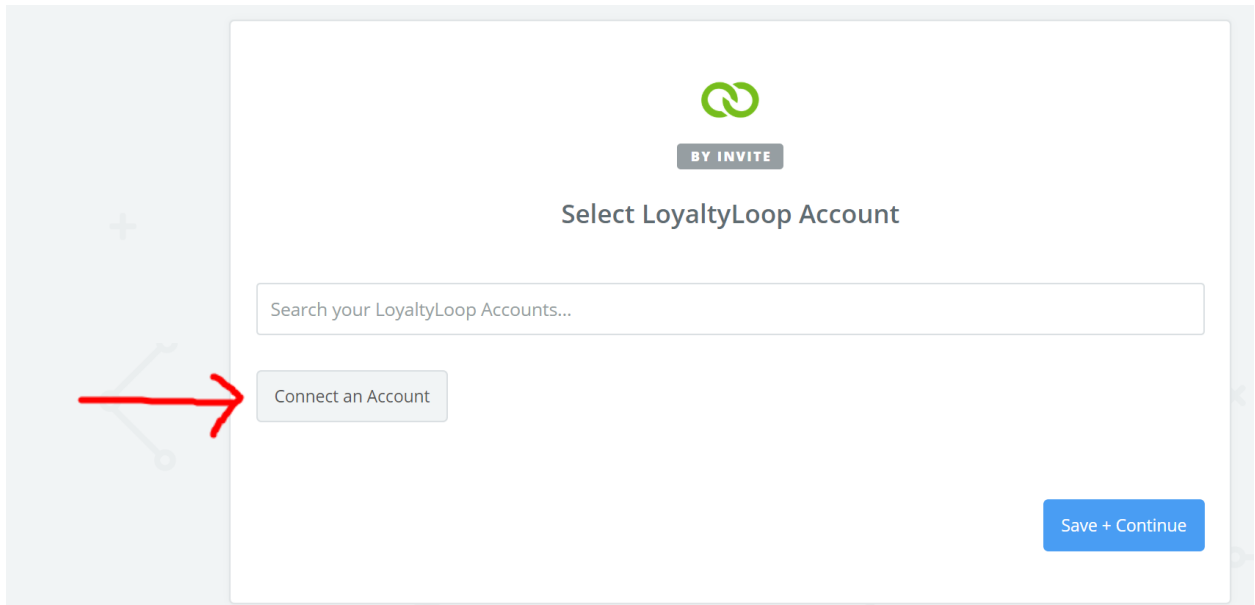
Select LoyaltyLoop Action


Create

Submit Customer Data
Submit customer data for the survey you specify.

Continue

9. Select/Connect your SurveyAdvantage account






BY INVITE

Select LoyaltyLoop Account

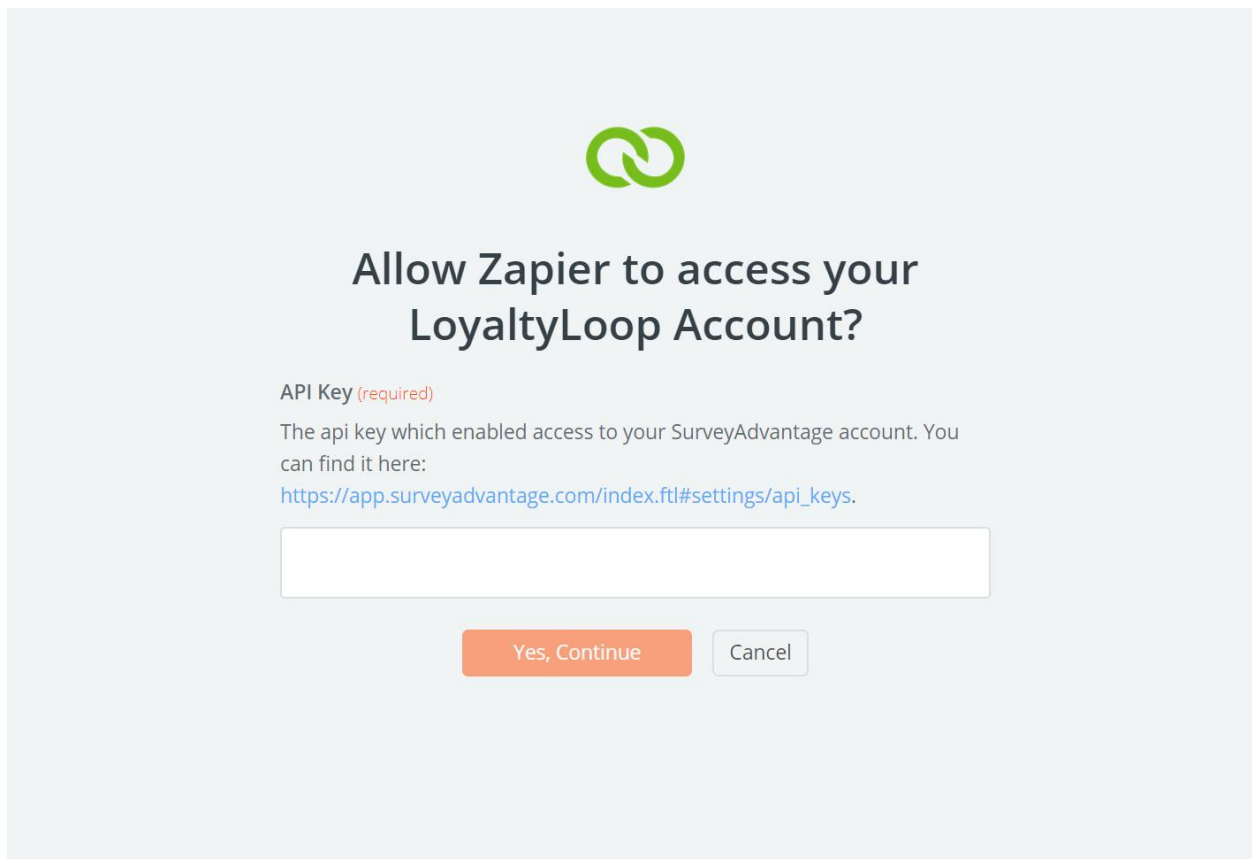
Search your LoyaltyLoop Accounts...

 **Connect an Account**

Save + Continue

10. Add Your LoyaltyLoop API Key to Connect it with Zapier

You will need to sign-in to your LoyaltyLoop account using a Admin User account, then click your Username and then Settings. On the Settings page, click API Keys. Create a new key by clicking the plus symbol (+) in the upper right, give your key a name (label) so you remember what the key is used for (e.g. "Zapier Key"), and hit Submit. Now copy the new key to your clipboard, and paste it in Zapier on the screen shown below.



The screenshot shows a confirmation dialog box with a light blue background. At the top center is the LoyaltyLoop logo, a green circle with two interlocking loops. Below the logo is the main heading: "Allow Zapier to access your LoyaltyLoop Account?". Underneath this is the label "API Key (required)" in red. The text explains that the API key is needed for access and provides a URL: https://app.surveyadvantage.com/index.ftl#settings/api_keys. A large white text input field is positioned below the URL. At the bottom, there are two buttons: an orange "Yes, Continue" button and a white "Cancel" button with a grey border.

11. Assign your customer data

BY INVITE

Set up LoyaltyLoop Customer Data

Setup Preview [Learn more](#) ON

Survey ID (required)
The ID of your survey.
Survey ID

Email (required)

First Name (optional)

Last Name (optional)

Full Name (optional)

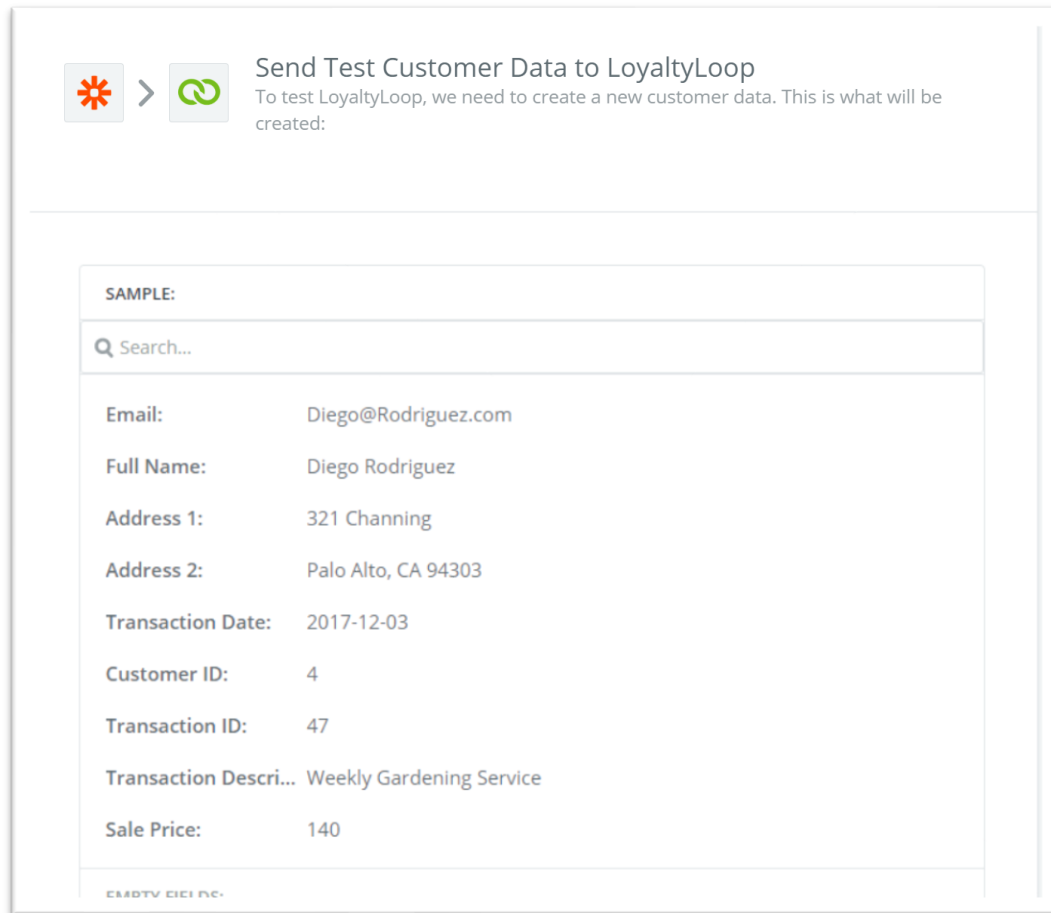
Customer Title (optional)
A title associated with the customer. For example, owner.

Company Name (optional)

Please use the table below as a baseline for mapping your customer data. Using this table, you see that when filling out the "Full Name" field, our recommended value would be using QuickBook's "Customer Ref Name" field.

SurveyAdvantage Fields	QuickBook Fields
Email:	Bill Email Address
Full Name:	Customer Ref Name
Address 1:	Bill Addr Line2
Address 2:	Bill Addr Line3
Transaction Date:	Txn Date
Customer ID:	Customer Ref Value
Transaction ID:	ID
Transaction Description:	Line Description
Sales Price:	Total Amt

12. Click “Continue”.



The screenshot shows a Zapier configuration step titled "Send Test Customer Data to LoyaltyLoop". It includes a search bar and a list of customer data fields.

SAMPLE:

Q Search...

Email:	Diego@Rodriguez.com
Full Name:	Diego Rodriguez
Address 1:	321 Channing
Address 2:	Palo Alto, CA 94303
Transaction Date:	2017-12-03
Customer ID:	4
Transaction ID:	47
Transaction Descri...	Weekly Gardening Service
Sale Price:	140

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13. Name your Zap and click “Finish”!

You’re all set! Going forward with each Sales Receipt (or Invoice depending on how you set it up), QuickBooks will send us the associated customer’s information. We collect this information on an on-going bases aggregating them until your next schedule survey launch.