

The QB
'APPY HOUR
with Liz & Heather
www.qbappyhour.com

QB 'Appy Hour Open Mic with Neal Coogler

With sponsor:


zapier



Your Hosts



Liz Scott
Accounting Lifeline



Heather Satterley
Satterley Training & Consulting

Introducing...



Neal Coogler
All About Business
Services



Jesse Parker
Zapier, Inc

Thank you to this month's sponsor!


zapier

Agenda

- ✔ Welcome!
- ✔ Automating your practice with Neal Coogler
- ✔ Let's raise a toast! This month's app sponsor: **zapier***
- ✔ Heather and Liz's coolest thing we did this month
- ✔ Preview of our next episode!



QB 'Appy Hour Open Mic *with Neal Coogler*

About AABS



- San Jose based firm
- Tech oriented
- Advisory, consulting and outsourced accounting services
- Accredited Business Advisor and Consultant, Institute of Business Advisors (pending)
- Elite level Certified QBO Advanced ProAdvisors
- ICB Certified Bookkeepers

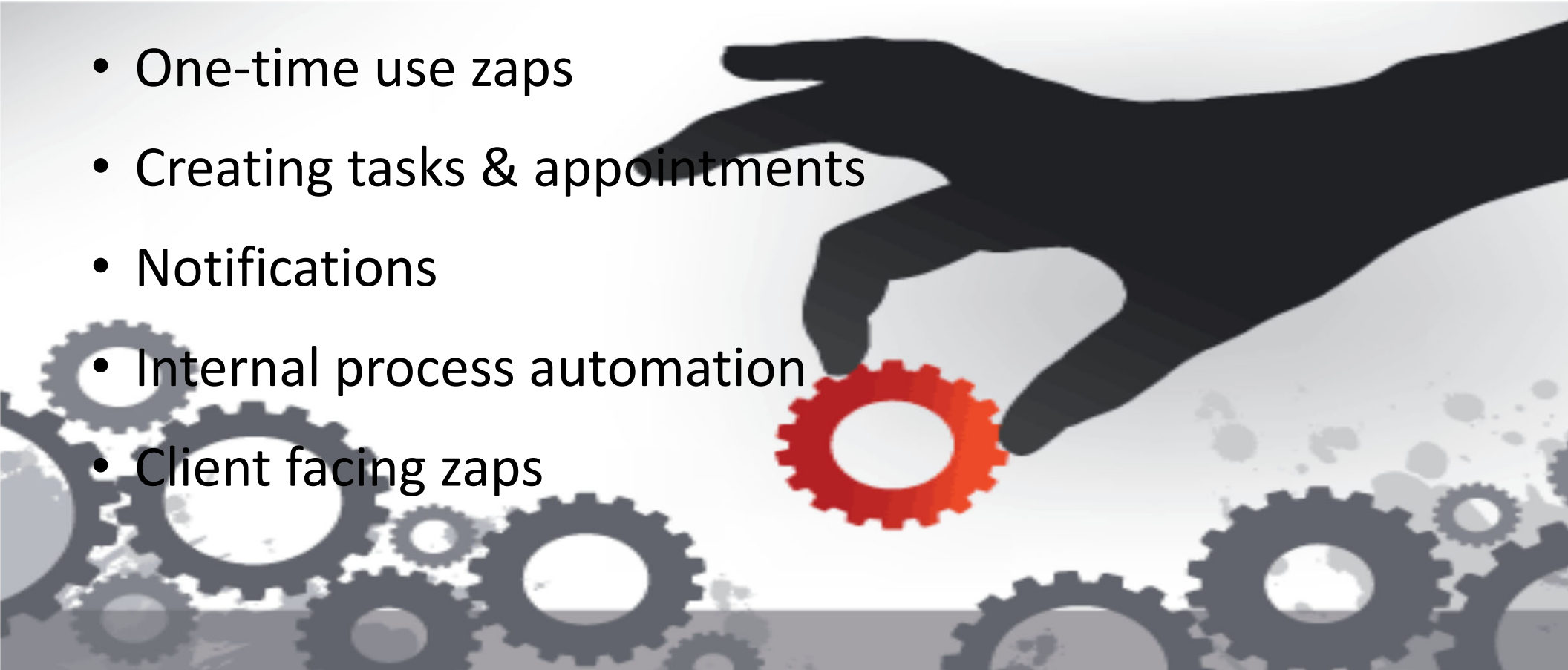
All About *Business Services*

How Zapier changed our practice



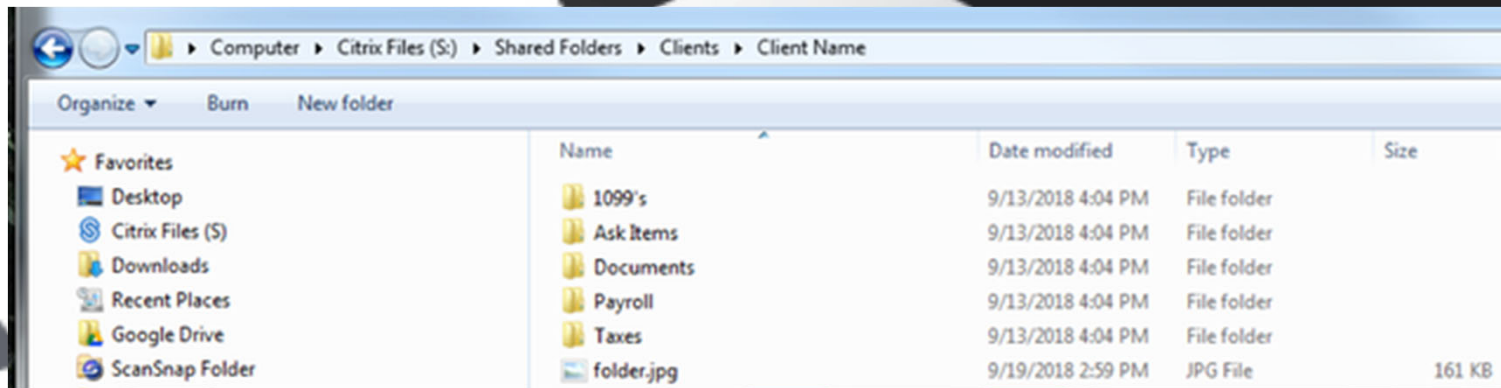
How We Use It

- One-time use zaps
- Creating tasks & appointments
- Notifications
- Internal process automation
- Client facing zaps



One-Time Use

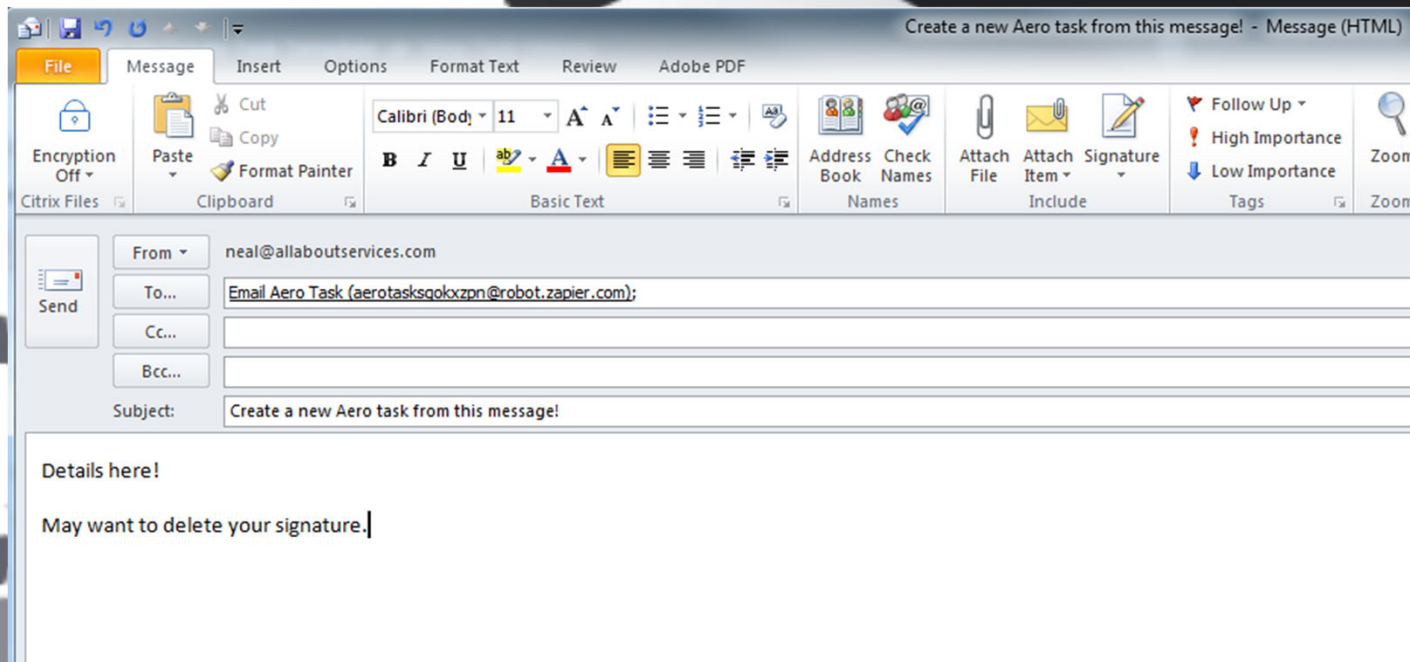
See Insightful Accountant article for step by step instructions:
The One Hit Wonder Zap by Neal Coogler



<https://www.intuitiveaccountant.com/tax-and-practice-management/the-one-hit-wonder-zap/#.XYkGjy5KiUk>

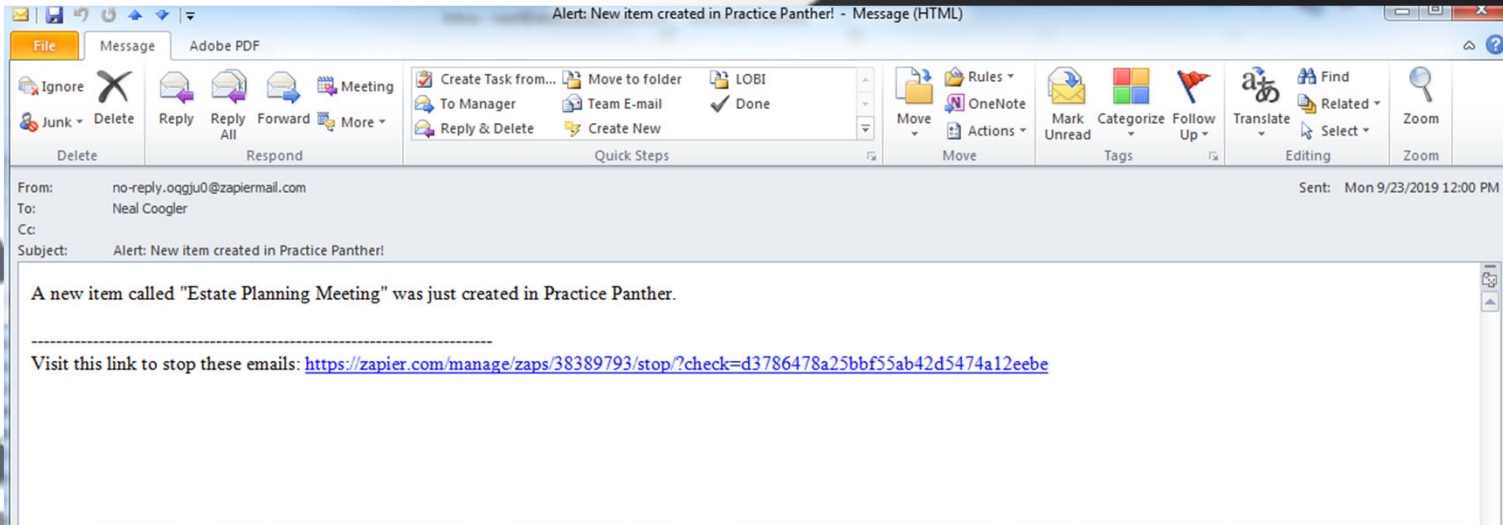
Creating Tasks & Appointments

Email tasks and appointments to project management system



Notification Zaps

Get notified when new account in QBO or a new service item in Practice Panther



Process Streamlining Zaps

Administrative onboarding automation

App	What happens
Practice Ignition	Proposal sent to client; client signs; Practice Ignition collects payment info
Zapier	New signed proposal triggers Zap to welcome email to client; client is asked to complete contact info Google Form
Google Form	Completion of form triggers more Zaps
Zapier	Zapier creates QBO customer, adds client to Aero, creates Sharefile folder for client, sends email to scheduler
Zapier	Zapier sends final email telling client they have been entered into our systems and inviting them to talk to us about automation

Welcome Email

Welcome! Please complete the new client contact information form

Neal Coogler <neal@allaboutsolutions.com>

Sent: Fri 9/20/2019 3:37 PM

To:



Dear 

Thank you for your business! We look forward to getting started working together. Please complete the following basic contact information form to begin set up in our systems.

[Enter preferred contact information](#)

Regards,
Neal

Neal Coogler, AICB Certified Bookkeeper
Advanced Certified QuickBooks Online Proadvisor
QuickBooks Desktop Proadvisor and Xero Certified Partner

All About Business Services, Senior Partner
408-799-7235
www.allaboutsolutions.com
Referrals welcome

Google Form

AABS New Client Contact Information

If you have multiple businesses, please complete a form for each business.

* Required

Legal Business Name *

Your answer

Your First Name *

Your answer

Your Last Name *

Completion Email

From: Neal Coogler <neal@allaboutsolutions.com>
To: [REDACTED]
Cc:
Subject: Thank you! Your contact information form has been received

Dear [REDACTED]

Thanks for your business and we look forward to working with you!

By the way, my automated client onboarding process just:

- Added an alert to my task management system that we have a new signed proposal
- Checked to see if you are a new client

- For new clients, it went on to:
 - Add your company to our task management system
 - Add your company to our QuickBooks Online file
 - Create recurring invoices for the engagement (if appropriate)
 - Add your company to our secure cloud folder system, Sharefile
 - And finally, send this email!

Let us know if you are interested in talking to us about automating your administrative processes.

Client Facing Zaps

Non profit donor thank you letter

Table of Plenty, A Nonprofit Corporation
PO Box 3693
Half Moon Bay, CA 94019

01/12/2016

(customer's name)
Hilltop Dry Goods, Inc.
123 Main Street
City, CA 12345



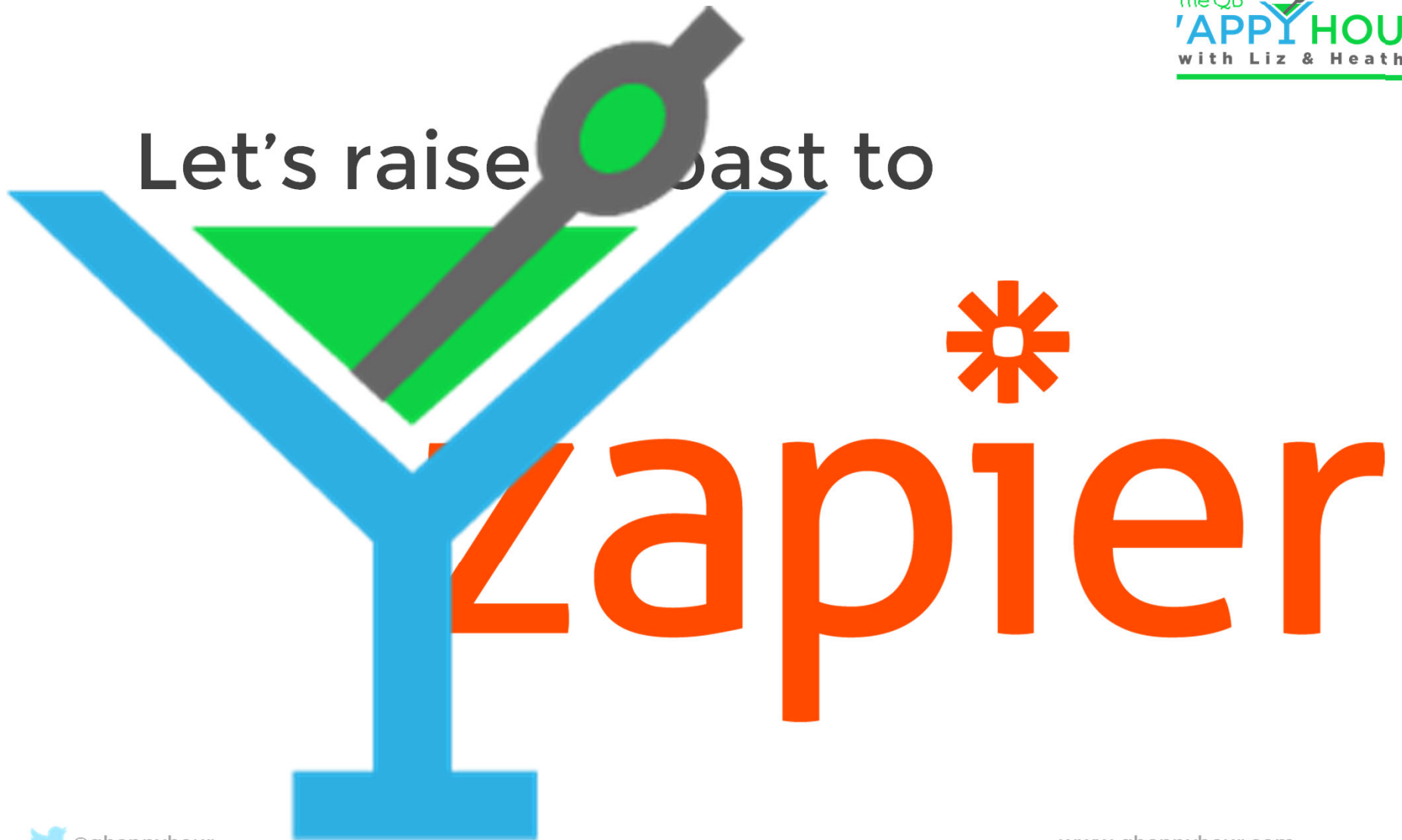
Thank you so much for your donation amount of \$450.00.

Know it will be used to continue to serve tasty and beautifully presented meals to struggling families, elders, the homeless and the hungry on the coast. I hope you will continue to support our organization in the future.

Thank you to Heather, Liz and Zapier!



Let's raise a toast to





zapi^{*}**er**

Zaiquiri

Recipe

- 🍹 2 oz of rum (light or white)
- 🍹 1/2 oz blood orange juice
- 🍹 1/2 oz lime juice
- 🍹 3/4 oz simple syrup

Directions

Add ingredients to a cocktail shaker, fill with ice, shake ~10 seconds, strain in a cocktail glass and serve without ice.

Garnish with a blood orange (or regular orange) skin twist or slice



Opportunities for Automation

Understanding which steps in your business processes add value, which don't, and where using a tool like Zapier can help add value and reduce business costs.



Jesse Parker

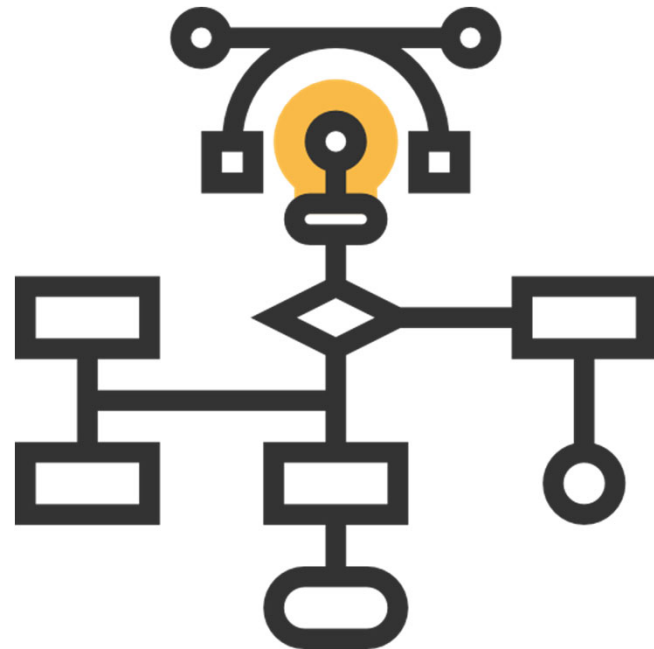
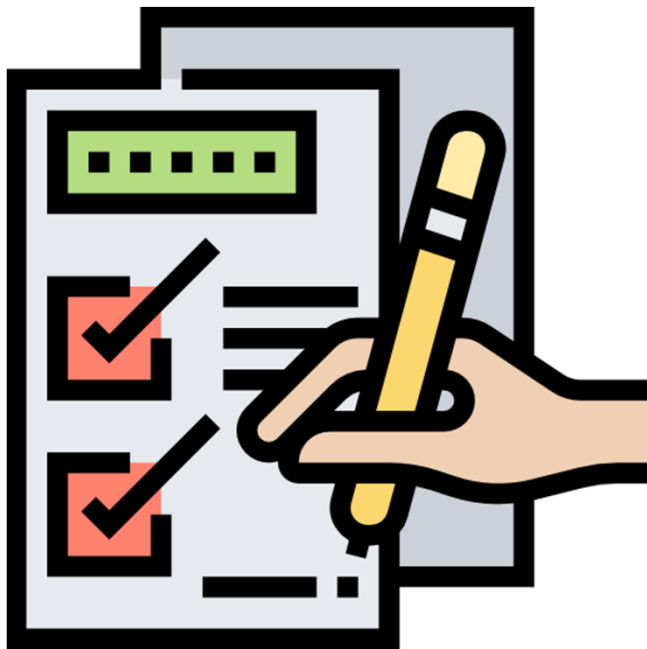
Community Manager at Zapier



“I’ve heard Zapier is cool but I’m not sure how, where, or when I should use it!”

Photo credit: <https://www.artsfwd.org/systems-thinking/>

Documenting your Processes





Client Onboarding Process

1. Client accepts proposal
2. Create customer in QuickBooks
3. Create invoice
4. Collect payment
5. Set up Slack Channel
6. Set up folder in Sharfile
7. Send Confirmation Email

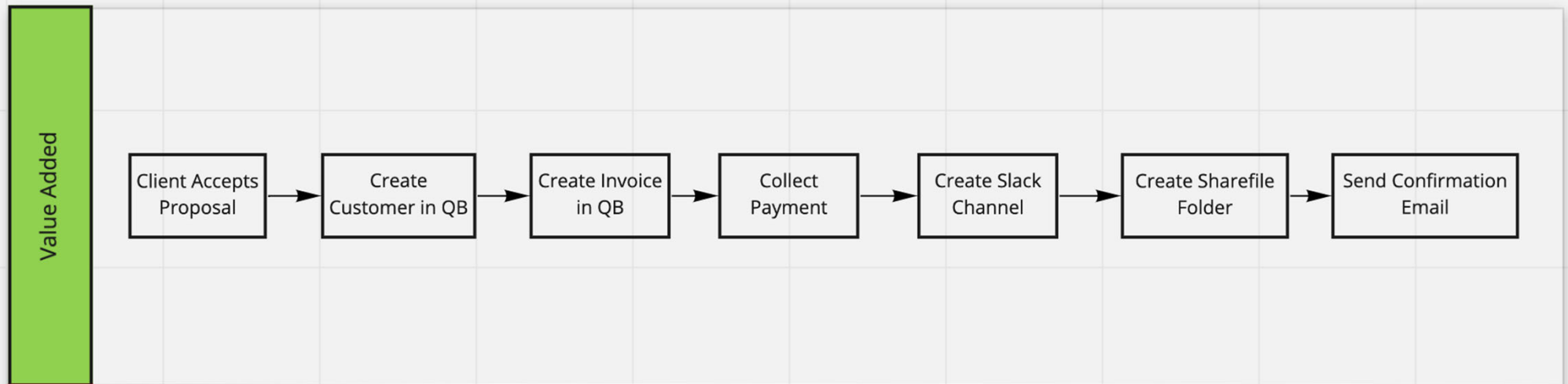


Opportunity Flowchart

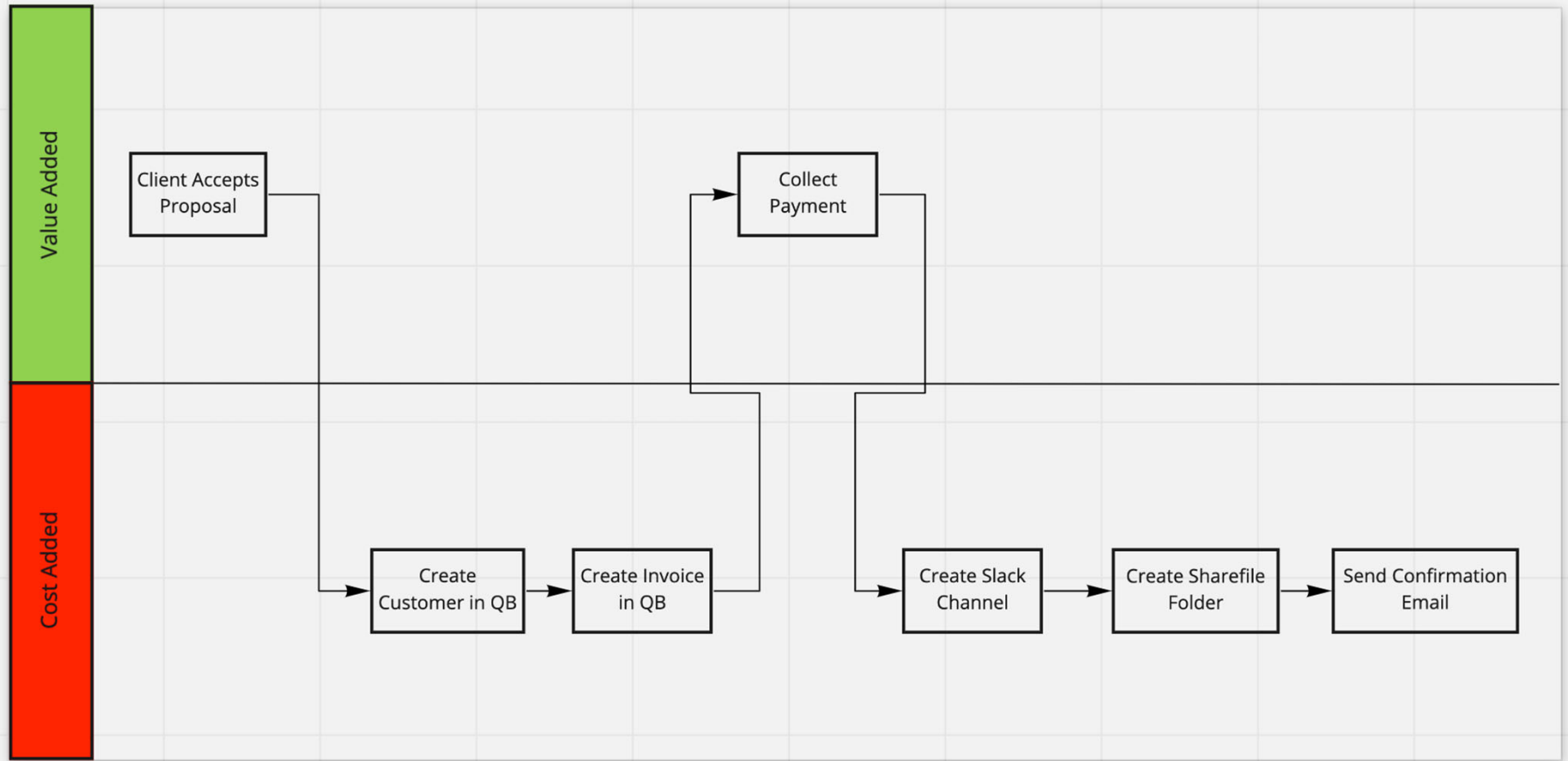


Opportunity Flowchart

Client Onboarding Opportunity Flowchart



Client Onboarding Opportunity Flowchart





Trigger Event

Practice Ignition Integration Details

Launched on Zapier December 11, 2017

Zapier combines Triggers (like "Proposal Accepted") and Actions (like "Create Client") to complete an action in one app when a trigger occurs in another app. These combos—called "Zaps"—complete your tasks automatically.

The following Practice Ignition Triggers, Searches, and Actions are supported by Zapier:

Triggers (3) Actions (1)

Proposal Accepted ⚡

Triggers when a proposal is accepted.

Proposal State Changed ⚡

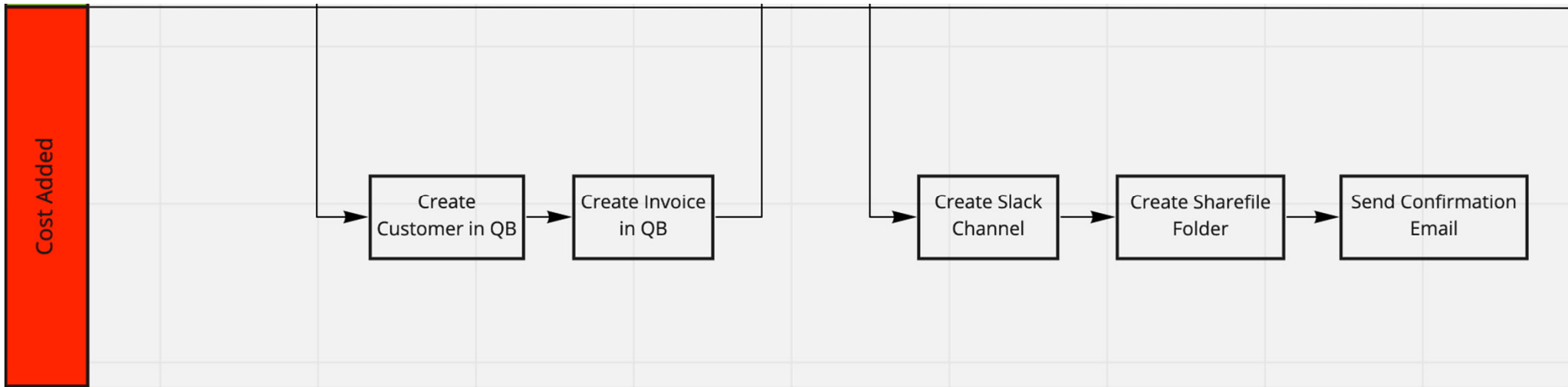
Triggers when a proposal's state changes.

Service Accepted by Client ⚡

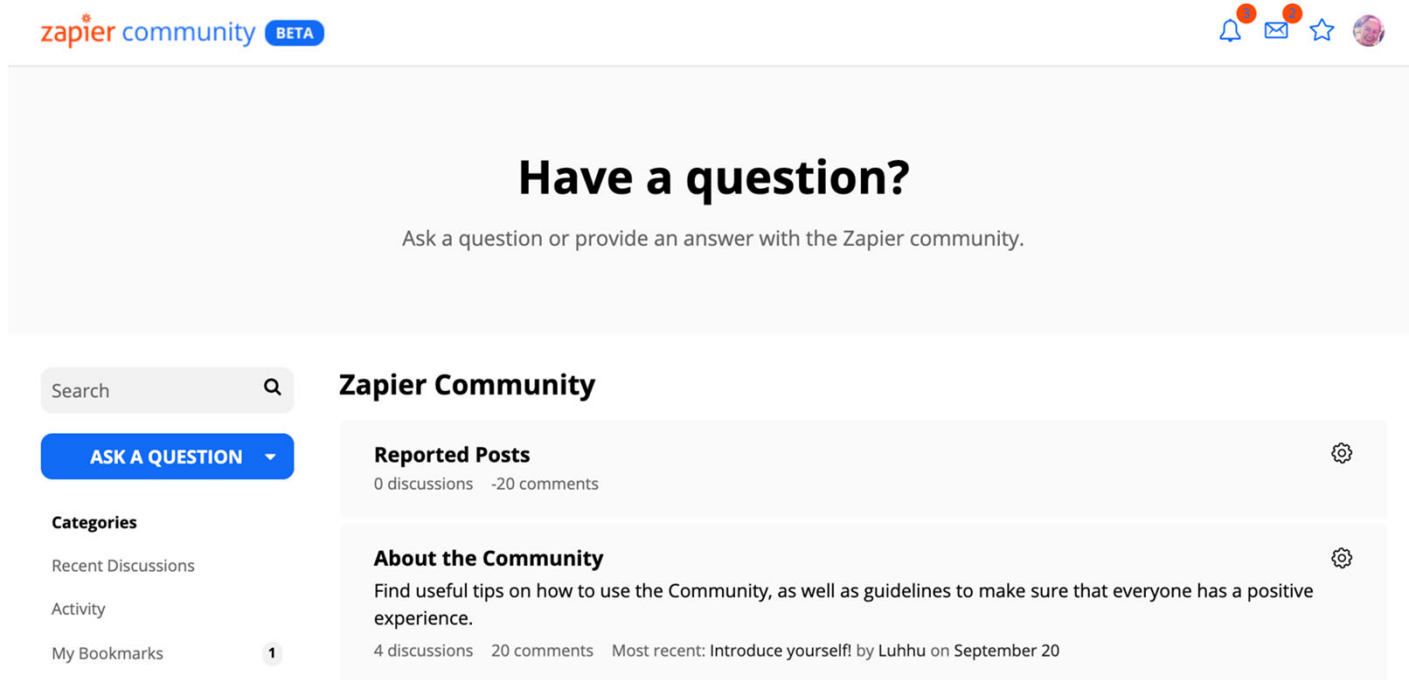
Triggers for each service in an accepted proposal. As an example, if a client accepts a proposal containing three services, this will trigger three times - once for each of the services.

[Connect Practice Ignition to 1,500+ Apps](#)

Action Steps



Zapier Community (community.zapier.com)



The screenshot shows the Zapier Community website. At the top left is the logo "zapier community" with a "BETA" badge. To the right are icons for notifications, email, a star, and a profile picture. The main content area features a large heading "Have a question?" with the subtext "Ask a question or provide an answer with the Zapier community." Below this is a search bar with the text "Search" and a magnifying glass icon. To the left of the main content is a sidebar with a blue "ASK A QUESTION" button and a "Categories" section containing "Recent Discussions", "Activity", and "My Bookmarks" with a "1" indicator. The main content area also includes two sections: "Reported Posts" (0 discussions, -20 comments) and "About the Community" (4 discussions, 20 comments, with a note about a recent post).

zapier community BETA

🔔 ✉️ ☆ 👤

Have a question?

Ask a question or provide an answer with the Zapier community.

Search 🔍

ASK A QUESTION ▾

Categories

- Recent Discussions
- Activity
- My Bookmarks **1**

Zapier Community

Reported Posts ⚙️
0 discussions -20 comments

About the Community ⚙️
Find useful tips on how to use the Community, as well as guidelines to make sure that everyone has a positive experience.
4 discussions 20 comments Most recent: Introduce yourself! by Luhhu on September 20

liz and Heather's Coolest thing

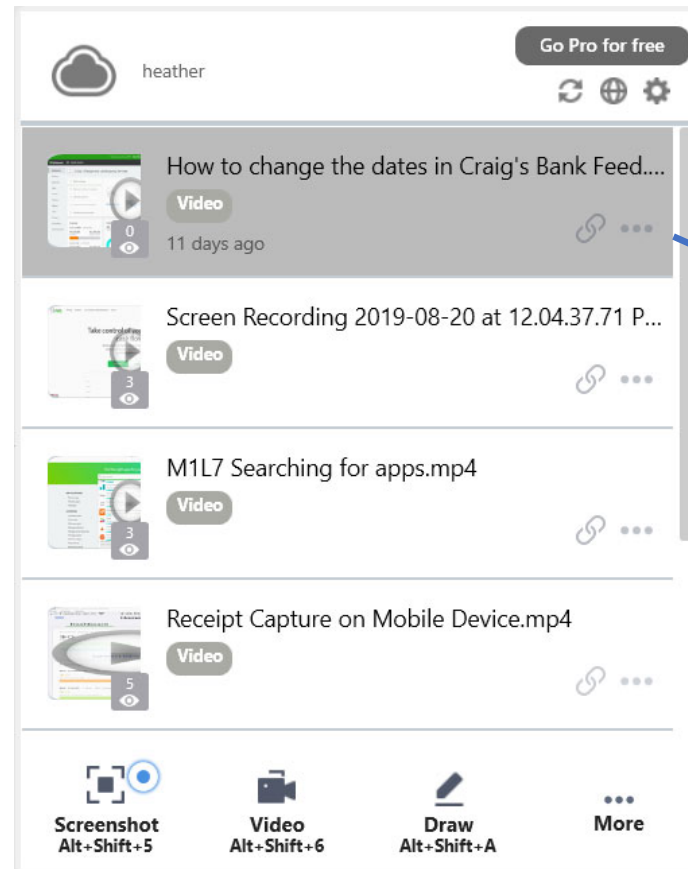
Cool tools I learned from Jesse

- 🍹 CloudApp
- 🍹 Clipboard apps (I use Comfort Clipboard)

CloudApp

<https://www.getcloudapp.com/>

- ✔ Free version
- ✔ Paid version allows for custom domain (branding)



Open in Viewer	Return
Copy link	Ctrl+Alt+C
Copy direct link	Alt+Shift+D
Copy download link	Ctrl+Alt+D
Save as...	Ctrl+S
Share to...	
View comments...	
Open in Browser	Ctrl+O
Lengthen link	
Secure drop	
Rename	F2
Delete	Shift+Del

Clipboard apps

- ✔ Windows has this feature but no way to exclude passwords!
Win +V
- ✔ Can select, drag and drop
- ✔ Extra security to exclude:
 - ✔ Passwords
 - ✔ Certain applications
- ✔ <https://www.comfort-software.com/clipboard-manager/>

www.qbappyhour.com

Clipboard Manager

1/12 9/22/2019 8:04:12 AM 28 Characters

Paste as:

- 0 Plain Text
- 1 Keystroke Sequence
- 2 HTML Text

Content	Size	Format
https://www.getcloudapp.com/	28 Characters	Text
[Screenshot]	346 Kbytes 319 x 370	Image
[Screenshot]	975 Kbytes 515 x 645	Image
The QB 'APPY HOUR with Liz & Heather	47 Kbytes 209 x 73	Image
qbappyhour	3 Kbytes 1207 x 34	Text
C:\Users\Owner\Documents\Zoom\2019-08-22 10.06.02 Rate Survey - Go over	1 Files	File
[Screenshot]	7 Kbytes 41 x 41	Image
C:\Users\Owner\Documents\Zoom\2019-08-22 10.06.02 Rate Survey - Go over	1 Files	File
https://www.voidtools.com/	26 Characters	Text
[Screenshot]	6,075 Kbytes 1920 x 1080	Image
Search Everything CloudApp Clipboard apps (Ditto, Microsoft Clipboard,	74 Characters	Text
Now Clipboard contains demo information. Press Win+Ins to view Clipboard content. Conv any information into Clipboard and it will be saved for any use later on.	225 Characters	Text



Liz Scott
Accounting Lifeline

The QB
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with Liz & Heather



Heather Satterley
Satterley Training &
Consulting

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- ✔ Send us a message 😊

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qbappyhour.com

DON'T FORGET TO:

- 🍷 Visit our sponsor's website!
- 🍷 Join The QB 'Appy Hour Lounge Facebook Group
<https://www.facebook.com/groups/qbappyhour/>
- 🍷 Register for Zoom so you can join the fun!



 @qbappyhour

www.qbappyhour.com

Upcoming Episodes

Up Next:

QB Appy Hour Open Mic:
Complete Controller with ADP

OPEN MIC GUEST:
Jennifer Brannen



ADP
Always Designing
for People™

October 8, 2019 4:00 PM EST



10/22/2019 - Why Bookkeepers Rock with Bento for Business

10/29/2019 - A/R Collect Deep Dive Session

11/05/2019 - QuickBooks Connect Pre-Conference Episode Live from San Jose

11/12/2019 - Kelly Bistriceanu from CollBox

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