The QB 'APPY HOUR

with Liz & Heather

www.qbappyhour.com

QB 'Appy Hour Open Mic with Neal Coogler

With sponsor:

zapier

The QB 'APPY HOUR with Liz & Heather

Your Hosts

Liz Scott
Accounting Lifeline

Heather Satterley
Satterley Training & Consulting

The QB 'APPY HOUR with Liz & Heather

Introducing...

Neal Coogler
All About Business Services

Jesse Parker
Zapier, Inc

The QB 'APPY HOUR with Liz & Heather

Thank you to this month's sponsor!

The QB 'APPY HOUR with Liz & Heather

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*

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

All About Business Services

About AABS

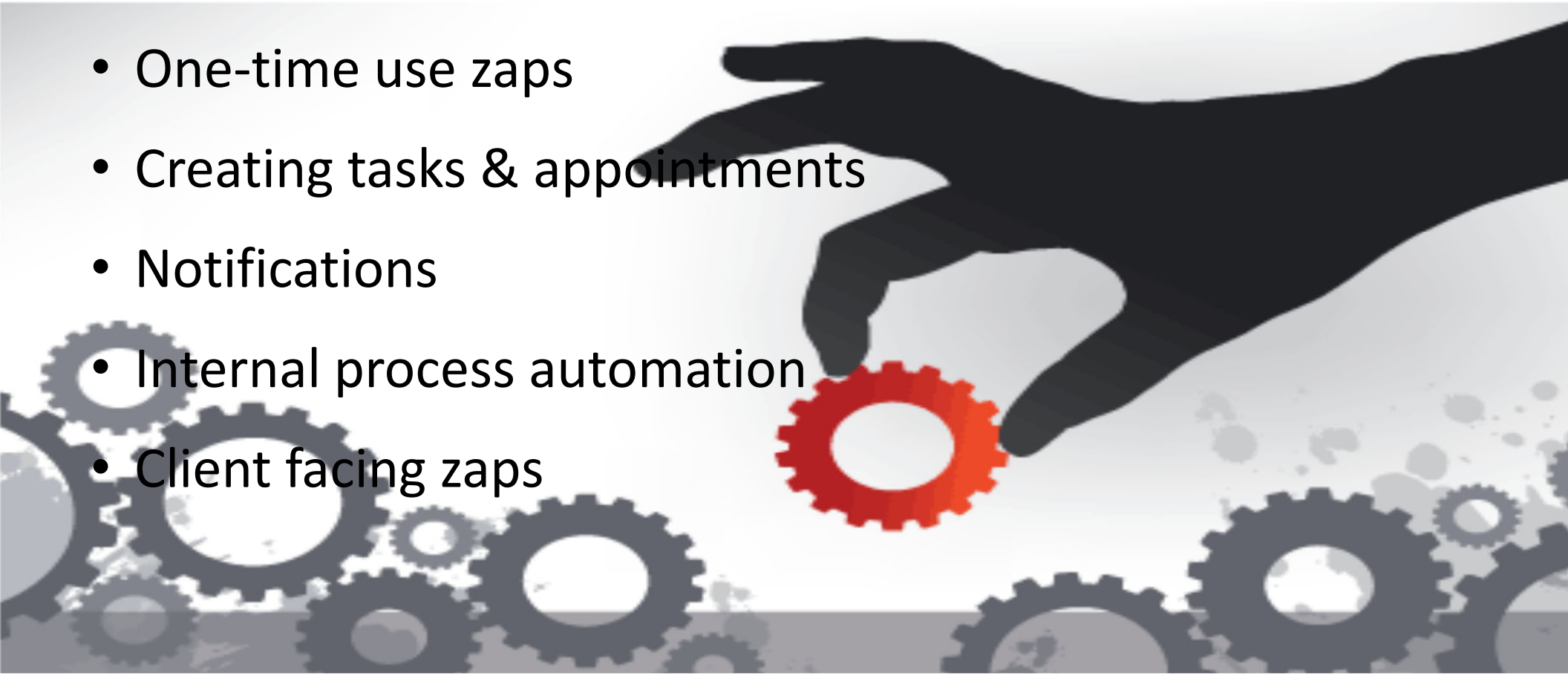
- San Jose based firm
- Tech oriented
- Advisory, consulting and outsourced accounting services
- Accredited Business Advisor and Consultant, Institute of Business Advisors (pending)
- Elite level Certified QBO Advanced ProAdvisors
- ICB Certified Bookkeepers

All About Business Services

How Zapier changed our practice

All About Business Services

How We Use It



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

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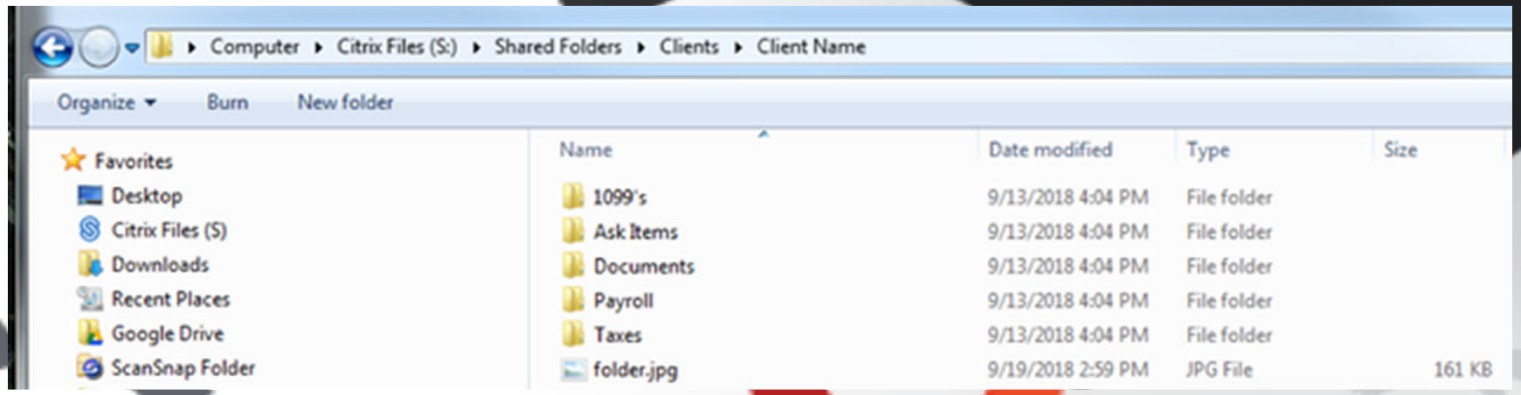
One-Time Use

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

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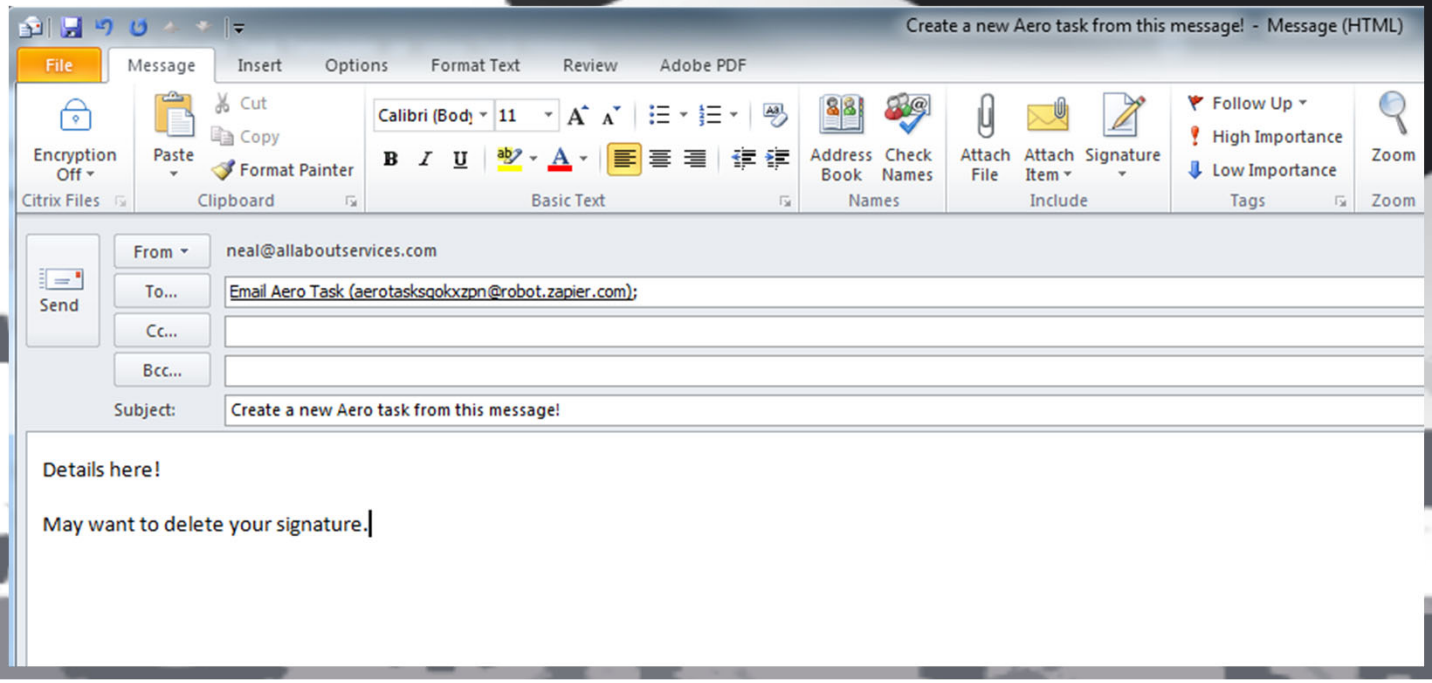
Creating Tasks & Appointments

Email tasks and appointments to project management system



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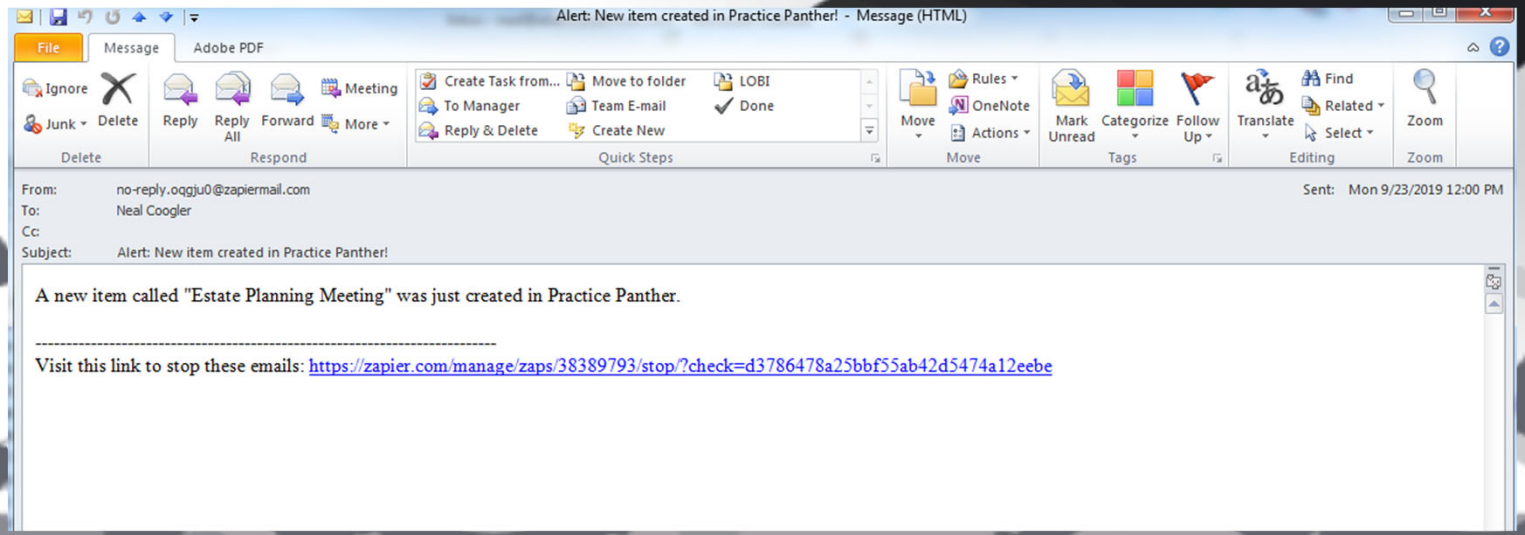
Notification Zaps

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



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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

All About Business Services

Welcome Email

Welcome! Please complete the new client contact information form

Neal Coogler <neal@allaboutservices.com>

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

To: [redacted]

Dear [redacted]

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.allaboutservices.com
Referrals welcome

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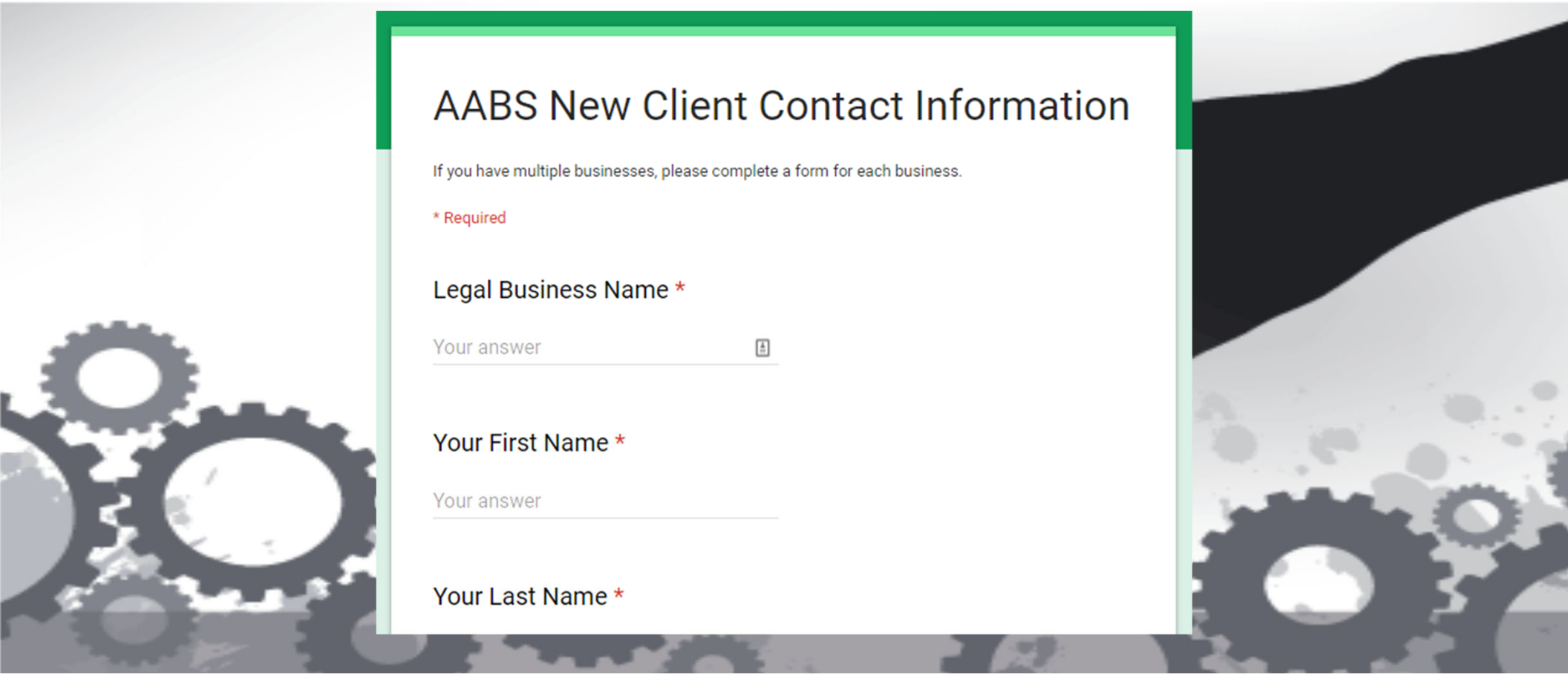
Google Form



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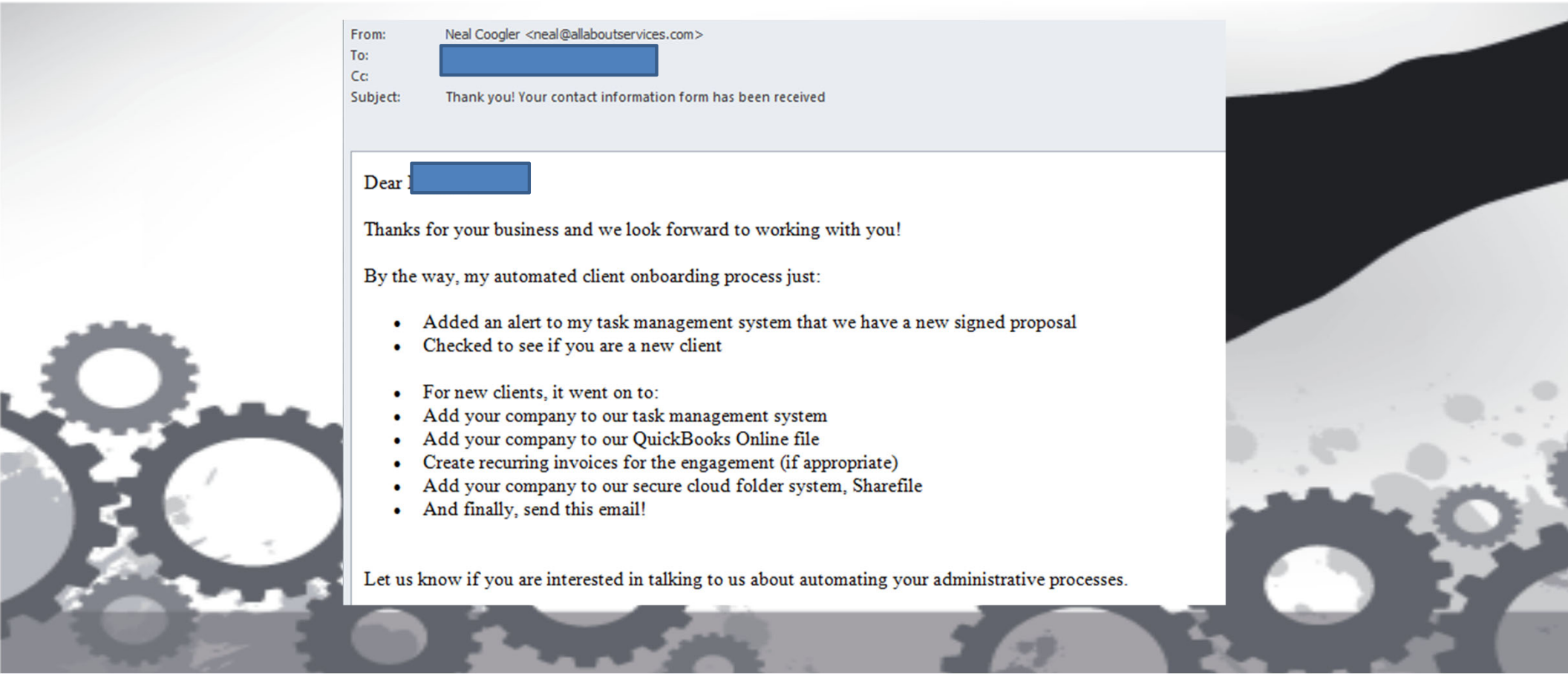
Completion Email



From: Neal Coogler <neal@allaboutservices.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.

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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

Table of Plenty
HALF MOON BAY • CALIFORNIA

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.

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Thank you to Heather, Liz and Zapier!

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Let's raise a toast to

Zapier

@qbappyhour

www.qbappyhour.com

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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.

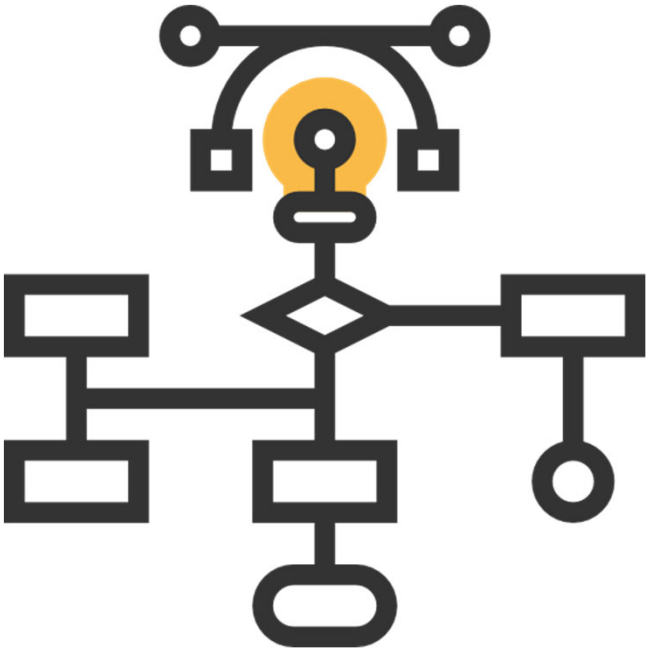
Jesse Parker

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



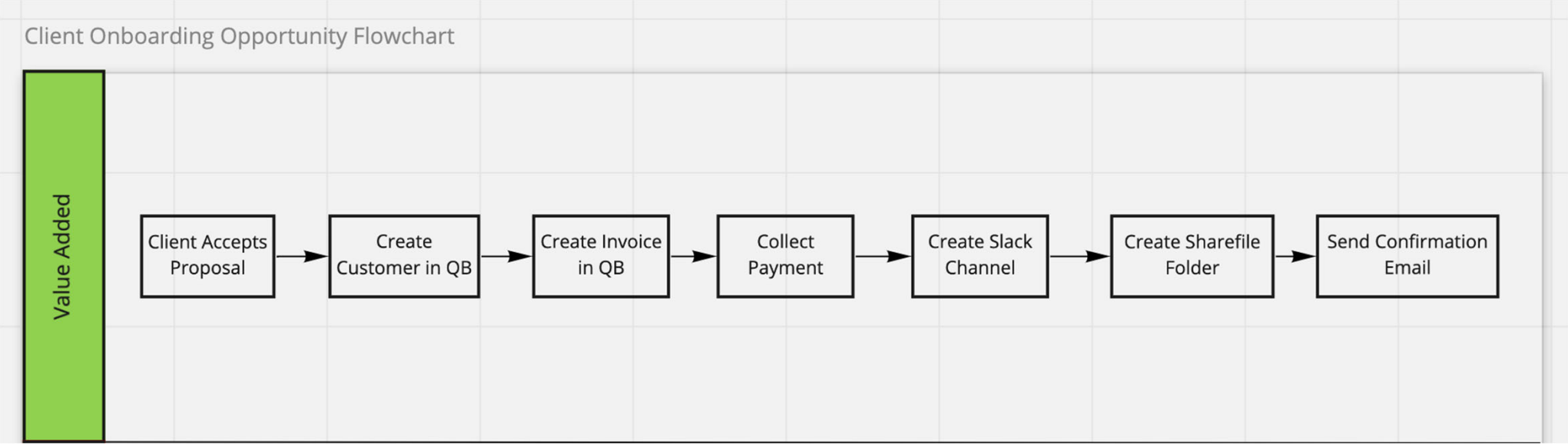
Client Onboarding Process

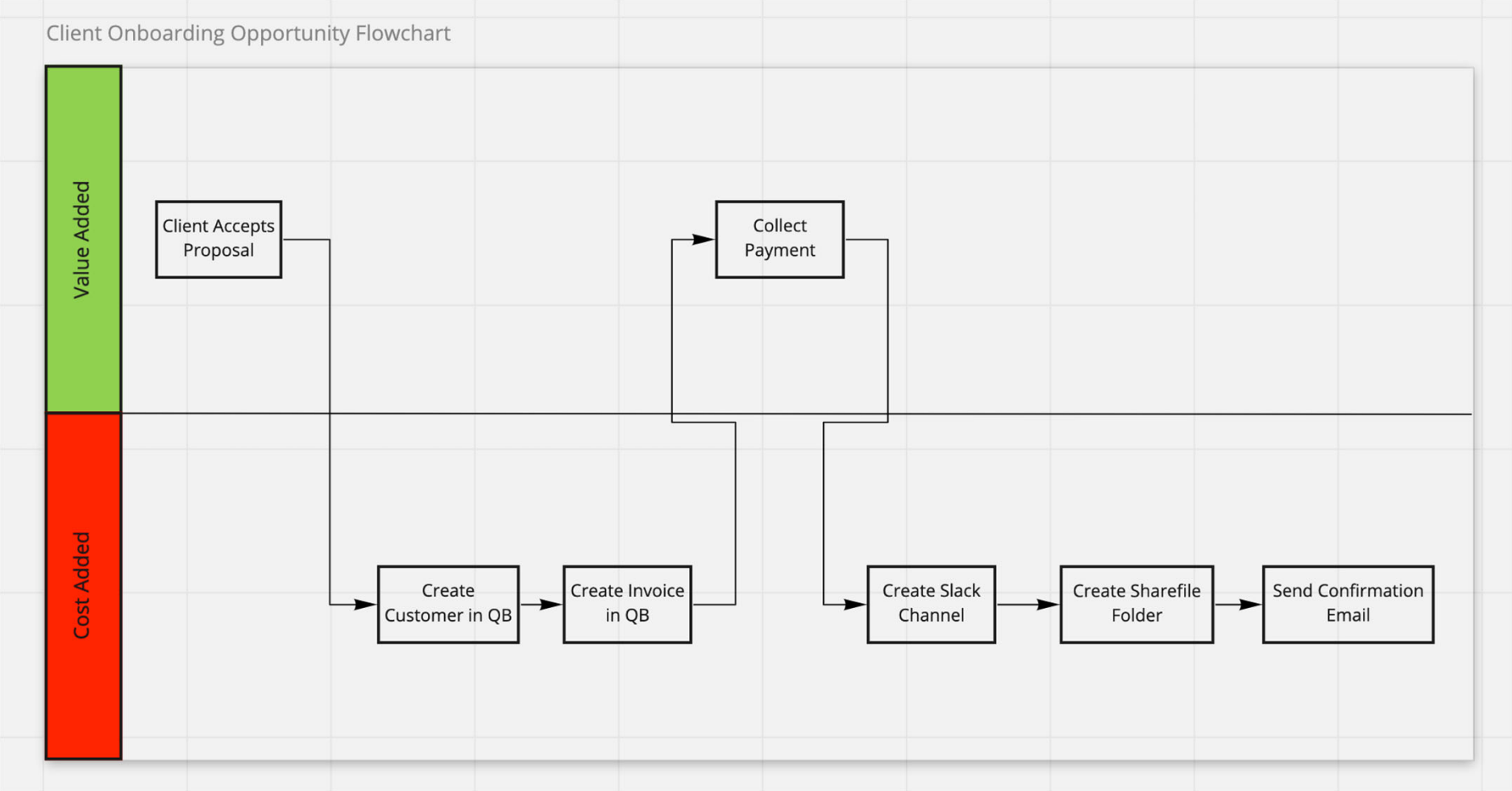
1. Client accepts proposal
2. Create customer in QuickBooks
3. Create invoice
4. Collect payment
5. Set up Slack Channel
6. Set up folder in Sharfile
7. Send Confirmation Email

Icons made by Eucalyp from www.flaticon.com

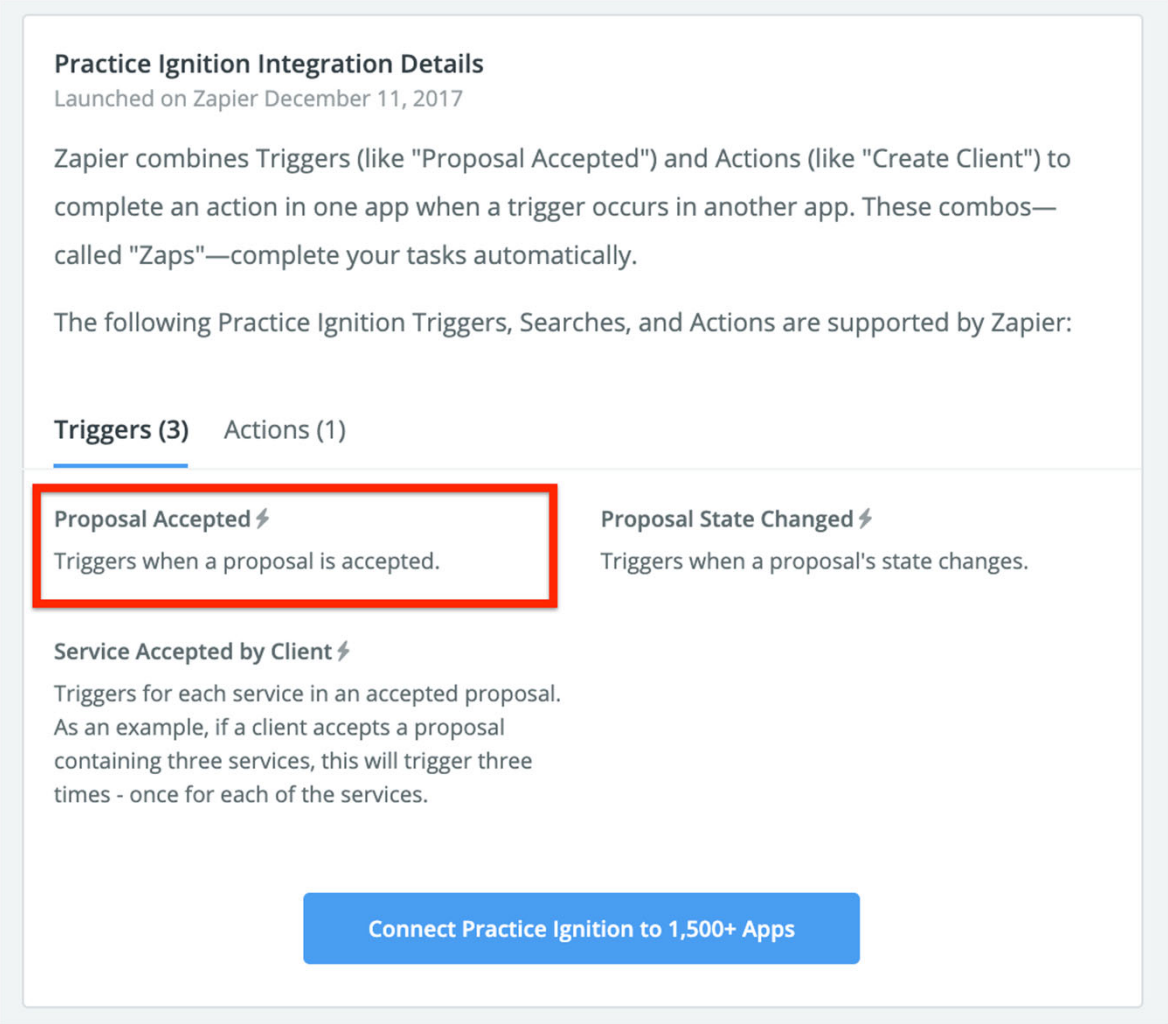
Opportunity Flowchart

Opportunity Flowchart

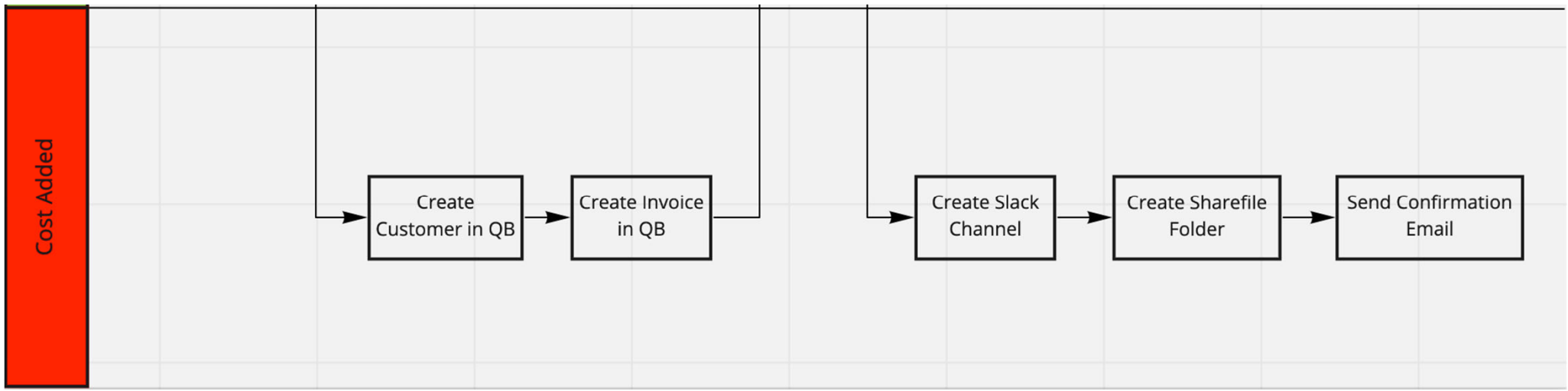



Client Onboarding Opportunity Flowchart
Value Added
Cost Added
Client Accepts Proposal
Collect Payment
Create Customer in QB
Create Invoice in QB
Create Slack Channel
Create Sharefile Folder
Send Confirmation Email

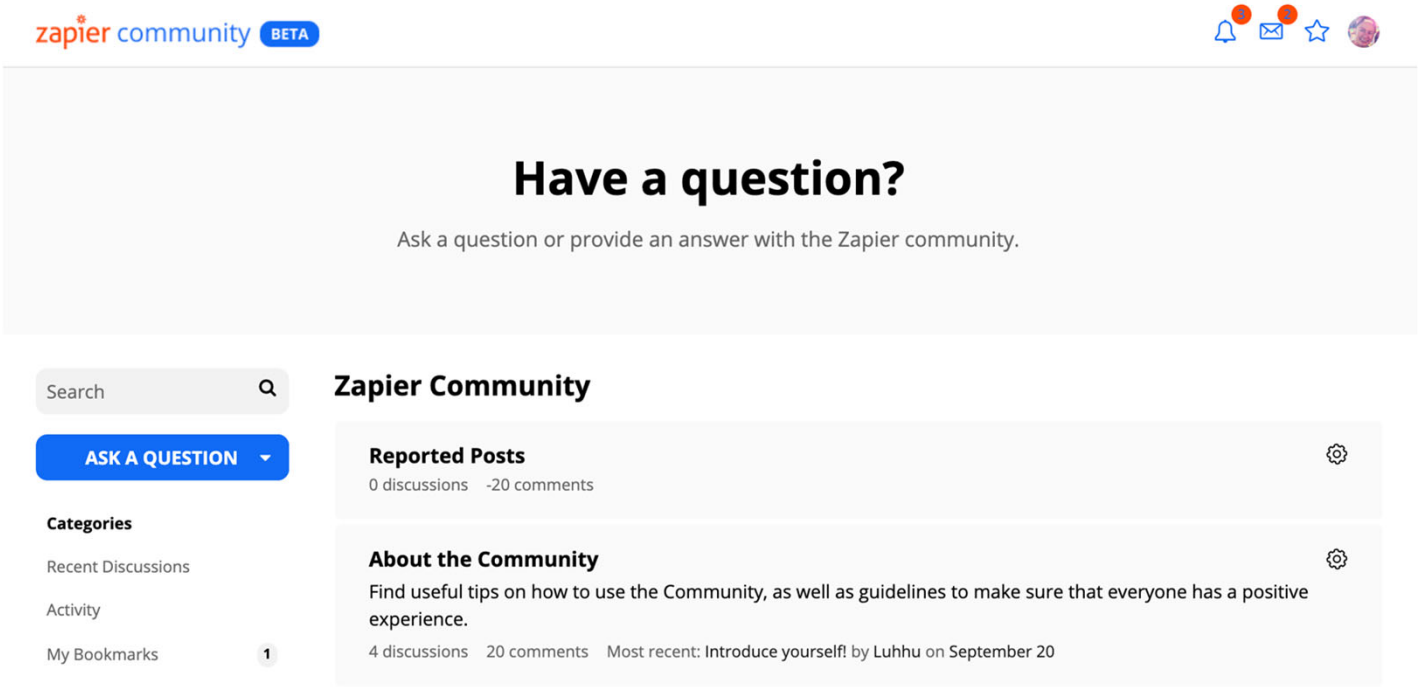
Trigger Event



Action Steps



Zapier Community (community.zapier.com)



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Liz and Heather's Coolest thing

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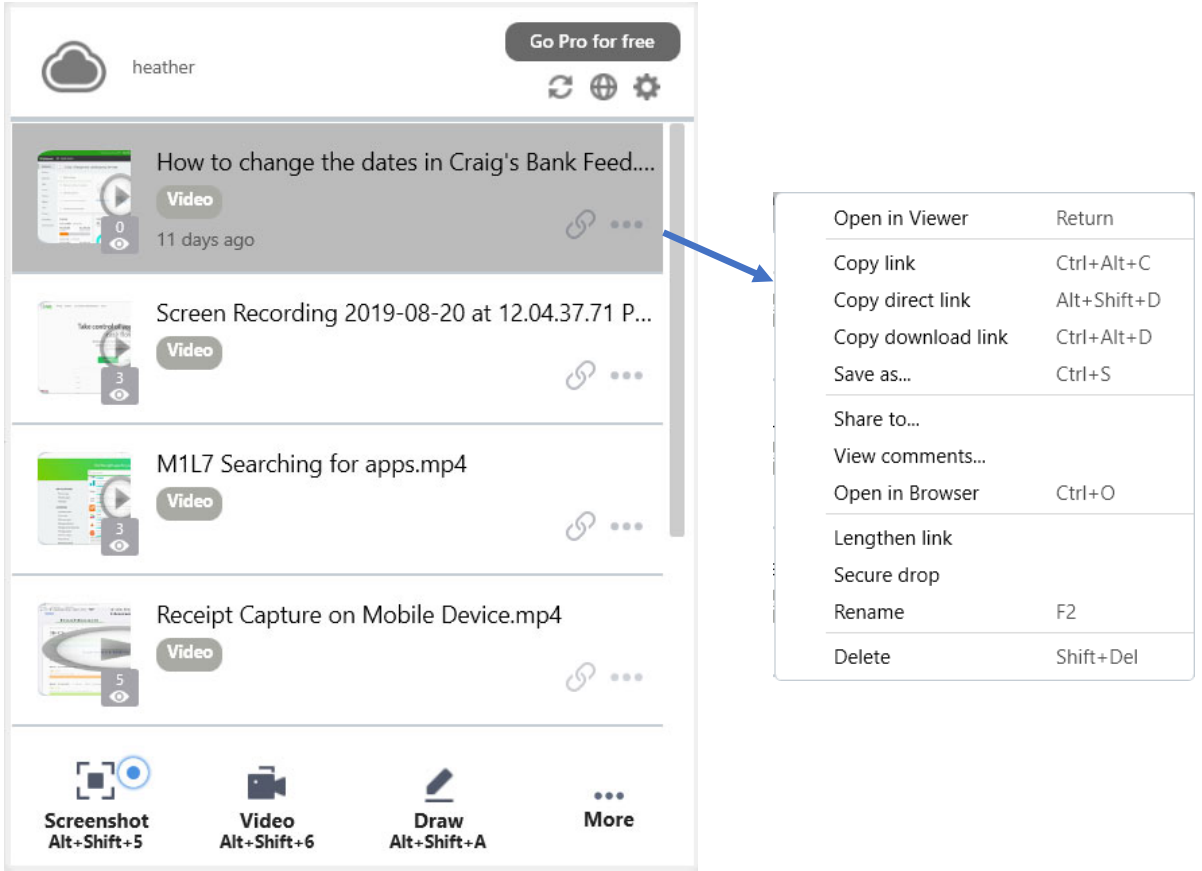
Cool tools I learned from Jesse

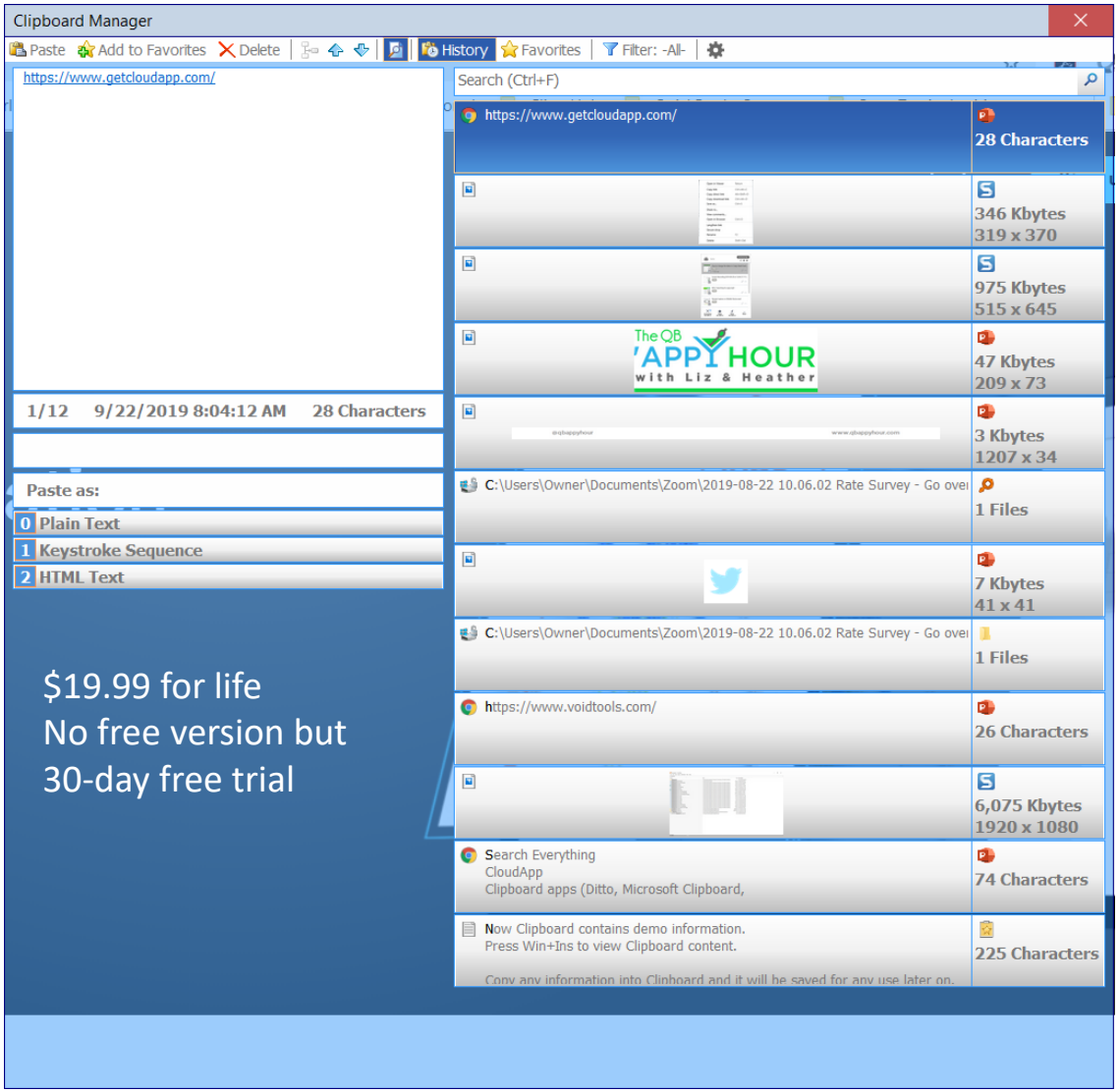
- CloudApp
- Clipboard apps (I use Comfort Clipboard)

CloudApp

https://www.getcloudapp.com/

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





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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/

Liz Scott
Accounting Lifeline

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with Liz & Heather

Heather Satterley
Satterley Training & Consulting

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  https://www.facebook.com/groups/qbappyhour/
- Register for Zoom so you can join the fun!

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Upcoming Episodes

Up Next:

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 Bistricieanu from CollBox

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