

Dext

Protect Your Time: Using Technology to Improve Client Communication

12 | March | 2024



“

**Today you are
going to start using
technology to
protect your time. ”**

So we do not
heed the

#Bookkeeper
BootyCall





Kellie Parks, CPB

Founder,

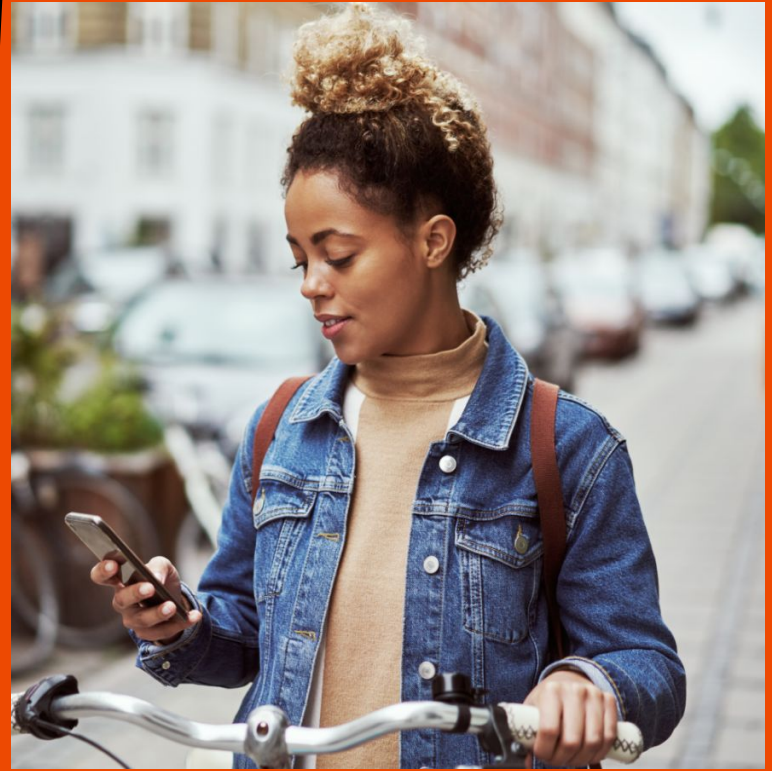
Calmwaters Cloud Accounting
&
Cloud Accounting Resources

Agenda

- Time and emotional bandwidth is finite
- Define and communicate your boundaries
- Use technology to manage boundaries



Time and emotional
bandwidth is finite!





Define your boundaries.



Setting boundaries,
protecting your time
and communicating
expectations is not
pushy.

You don't want clients
to be afraid to
communicate with you!

Be #BossyNice





Use technology to
protect time



Dext features to protect time



“

Make it easy so it gets
done. Go where your
clients live. ”

Mobile app



One receipt or bill

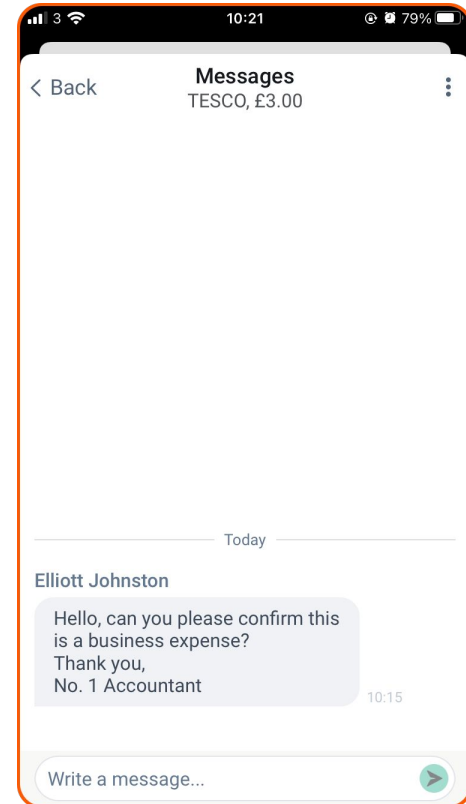
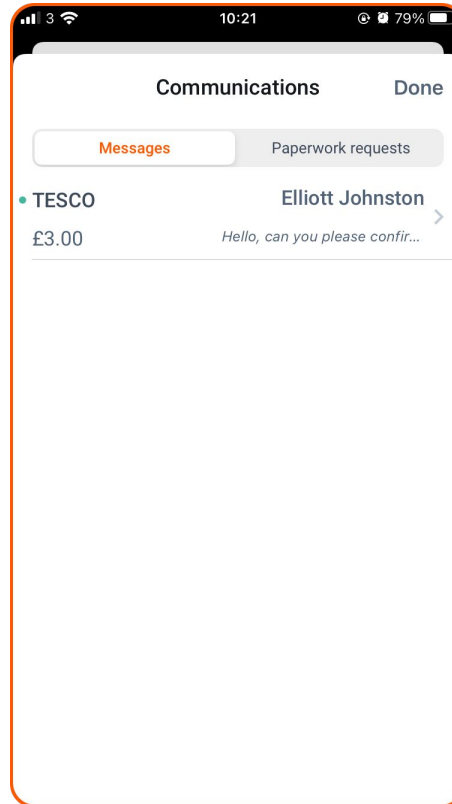
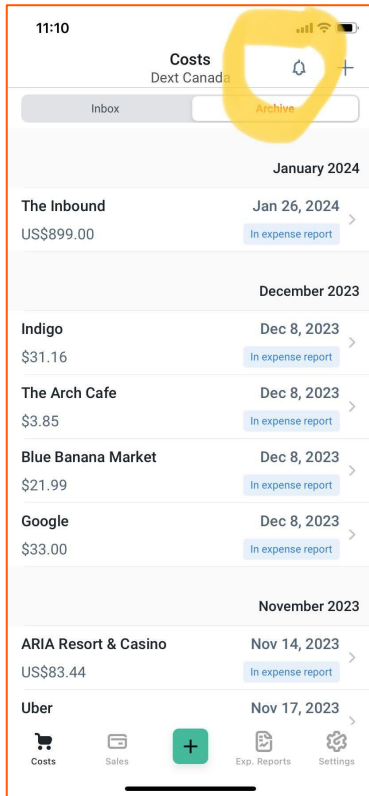


More than one receipt or bill



A long or double-sided receipt or bill

Mobile messaging



Email in

Email-in address

sally.smith.accountant

Costs

Single: sally.smith.accountant@dext.cc 

Multiple: sally.smith.accountant@multiple.dext.cc 



Sales

Single: sally.smith.accountant+sales@dext.cc 

Multiple: sally.smith.accountant+sales@multiple.dext.cc 



Email in

The screenshot shows an email client window with a toolbar at the top containing icons for window management, navigation, and editing. The email header includes the recipient address 'no.1.accountant@dext.cc', a subject line, and a message size of 12 KB. The main body of the email contains an invoice for 'New printer and ink supplies'. The invoice includes a header with the word 'Invoice', a 'Buy More' section with the address '42 Main Street, London, SW1W 0NY', and a 'Ship To' section with the name 'John Smith' and the same address. A grey box highlights the invoice details: 'Invoice Date: 18/12/2022', 'Invoice Number: 1671444356', and 'DUE DATE: 30 days'. Below this is a table with columns for Description, Quantity, Unit Price, VAT %, VAT, and Total. The table lists two items: a 'New printer' and a 'Colour ink cartridge', both with a quantity of 1 and a unit price of £100.00. The VAT is 20% for both, resulting in a VAT of £20.00 and a total of £120.00 for each item. The 'Sub Total' is £200.00, and the 'Total VAT' is £40.00. The final 'Total amount due' is £240.00.

To: no.1.accountant@dext.cc

Cc:

Subject:

Message Size: 12 KB

#note New printer and ink supplies #note

Invoice

Buy More
42 Main Street
London, SW1W 0NY

Ship To
John Smith
123 Main Street
London, SW1W 0NY

Invoice Date: 18/12/2022
Invoice Number: 1671444356
DUE DATE: 30 days


Description	Quantity	Unit Price	VAT %	VAT	Total
New printer	1	£100.00	20	£20.00	£120.00
Colour ink cartridge	1	£100.00	20	£20.00	£120.00
Sub Total					£200.00
Total VAT					£40.00
Total amount due					£240.00

NEW: Original Email Trail


[Back](#)
[Publish](#)
[Add To Expense Report](#)
[Split](#)
[Archive](#)
[Convert to Sales](#)
[Delete](#)

[Previous](#)
1 / 71
[Next](#)

Copy of Baths INV-2023-001
1 / 1 | - 98% + | 📄 ↻



1



JPR United States
www.jpr.com

Highland Industrial Park
2901 S Highland Dr, Las Vegas, NV 89109, United States

DEXTERITY CONSTRUCTIONS
123 Elm Street Springfield, IL 62701 USA

Tax Invoice

Invoice No. INV-2023-001

Date	October 19, 2023
Account No	3434323
Order No	INNOVATION
Job No/Name	CHERRY TREE LANE
Sales Person	HARRY ROUGE #14
Supply Branch	Plumbing Plain #4991
Supply Branch Tel	

Product Code	Description	Qty Supplied	Unit Price before GST	Unit	Net Price	Sales Tax	Total Price inc GST
1523912	Evo Pipe - Green 20mm x 50mtr	1.0	120.20	COIL	120.20	12.02	132.22

↶ ↷ ⬇ ⬆

Details
Email
Messages
Note
History
Ready

🕒 The authenticity of the sender and recipients' email addresses has not been verified.

From:

Date: 25 Jan 2024

Subject: Fwd: Invoice for January 2024

To:

Hi,

Hope you're doing well. Apologies for any inconvenience. I've attached the invoice you requested.

If you need any further clarification or information, feel free to reach out.

Best regards,

> ----- Forwarded message -----

> From:

> Date: Thu, Jan 25, 2024 at 9:11 AM

> Subject: Re: Invoice for January 2024

> To:

>

> Hi,

> I hope this email finds you well. I'm currently in the process of reconciling our records, and I noticed that I am missing an invoice from your end. Could you please provide me with the invoice details for the transaction dated January 2024?

>

> Your prompt response would be greatly appreciated.

>

> Thank you,

>

> Prince

>

> Accountant

>> --



>> [image: dext]

Notes feature

Category ⬆ ⬆ Total ⬆

400 - Advertising & Mar... ⬇ GBP 13.49 GBP 0.00

As the date was either incomplete or not visible on this item, we have used the date of submission.

  Publish

Big Pies Ltd > < Back 📄 Publish Add To Expense Report Split Archive Tools Report a mistake Delete < Previous 1 / 19 Next >

WORKSPACES

Costs ⌵

Inbox 19

In Processing 0

To Review 5

Ready 14

Archive

By Big Pie
Item ID: 0374863702

SALES RECEIPT
Customer copy

World Duty Free
VAT Reg No : GB16258959
Stansted Duty Free
For Customer Support - call
+44 (0)1784 475 509

Flight Code: FR 1730
Destination: SDF
Destination Zone: EU

13133011	1005047604	
ELE SUPERFOOD CIGA CALM HYD	33.35	
10140450	1003472038	
VH PINOT NOIR	13.49	

Details Messages **Note** History

As the date was either incomplete or not visible on this item, we have used the date of submission.

Flags

The screenshot displays the Dext software interface for 'Big Pies Ltd'. On the left is a dark sidebar with navigation options: 'Costs', 'Inbox' (27), 'In Processing' (0), 'To Review' (10), 'Ready' (17), and 'Archive'. The main area features a table of expense items with columns for 'Status', 'Supplier', 'Category', 'Total', and 'Tax'. A 'Tools' dropdown menu is open over the table, listing actions: 'Export', 'Merge', 'Bulk edit', 'Send via e-mail', 'Convert to Sales', 'Clear publishing data', 'Flag', 'Unflag', and 'Delete'. The table contains several rows, some with 'To Review' badges and warning icons.

Status	Supplier	Category	Total	Tax
<input checked="" type="checkbox"/> To Review 1	Atm ⚠	<input type="text"/> ⓘ	USD 201.25	USD 0.00
<input checked="" type="checkbox"/> To Review 1	Any Bank ⚠	<input type="text"/> ⓘ	USD 201.00	USD 0.00
<input type="checkbox"/> To Review 1	Ma & Pa's Bake ... ⚠	<input type="text"/> ⓘ	USD 17.98	USD 1.35
<input type="checkbox"/> To Review 1	The Sand Dollar ⚠	<input type="text"/> ⓘ	USD 82.98	USD 0.00

Financial Cents features to protect time



Automated client reminders

☰ Tasks Client Chat Manage Notifications ⓘ

✚ **Please take a picture of your odometer and upload it to Dext.** ⌚ Add Due Date

We need to make sure we have your the vehicle mileage reading captured for posterity's sake. In the event of an audit, the CRA will require the year beginning and ending validation for any one who submits mileage expenses through your company. Please make sure you check this task off so my practice management app, Financial Cents, doesn't auto-nag you!

⌚ Manage Client Uploads ▾ 📎 Add Attachment 👤 Request Signature 💬 Comment 🗑 Delete Task Recur with project



Automated client reminders

BKP'G - YE Odometer Reading Jan '23 - Dec '23 — Calmwaters Sample Client

Starts on Jan 1st, 2024 | Due on Jan 5th, 2024 | + Tags

List Client Tasks Team Chat Files Time Tracking Client Emails

Tasks Client Chat Manage Notifications

Automated Notifications Active

Specify the start date and frequency of notifications

Start Date

Jan 3rd, 2024

Send Reminders

One time only

The request list will be sent to Calmwaters Sample Client on Mar 5th.

Manual Notification

Send a one time notification now

[Send a one-time notification](#)

Customize Client Notifications

Customize the client task emails sent to your clients

Custom Client Notification

Contacts

Reminders will be sent to the following email addresses.
You can manage contacts in the client's page.

- Kellie Parks <calmwatersbusi>
- Jeff Parks No email address.

Representative

The selected representative will be shown to the client

Kellie Parks (me)

Next Reminder

When will the next notification occur

Next reminder will be sent on Ma

- Select an Option
- One time only
 - Once a day
 - Every 2 days
 - Every 3 days
 - Every 4 days
 - Every 5 days
 - Every 6 days
 - Every 7 days
 - Every 8 days**
 - Every 9 days
 - Every 10 days
 - Every 11 days
 - Every 12 days



Custom notification settings

Manage Notifications
Select which notifications to subscribe to

Notify me when when a new comment is posted on a task
 Enable in-app notifications Enable email notifications

Notify me when I am assigned a new task
 Enable in-app notifications Enable email notifications

Notify me when I am assigned a new project
 Enable in-app notifications Enable email notifications

Notify me when a project is completed and ready for review
 Enable in-app notifications Enable email notifications

Notify me when a project is created when I send an email to projects@mail.financial-centers.com
 Enable in-app notifications Enable email notifications

Notify me when a comment is posted on a project I am participating in
 Enable in-app notifications Enable email notifications



Custom upload button

The screenshot displays a task management interface. At the top, there are navigation tabs for 'Tasks', 'Client Chat', and 'Manage Notifications'. A task card is visible with the following content:

- Please take a picture of your odometer and upload it to Dext.** ⌚ Add Due Date
- We need to make sure we have your the vehicle mileage reading captured for posterity's sake. In the event of an audit, the CRA will require the year beginning and ending validation for any one who submits mileage expenses through your company. Please make sure you check this task off so my practice management app, Financial Cents, doesn't auto-nag you!
- 🕒 Manage Client Uploads ▾ 📎 Add Attachment 👤 Request Signature 💬 Comment 🗑 Delete Task Recur with project
- + Add Task



Custom upload button

Customize upload destination ✕

Text to display

Upload URL

Clients will be asked to upload documents to this location

[Reset to default upload settings](#)



Custom recurrences of work

Update BKP'G - YE Odometer Reading

Project Name*
BKP'G - YE Odometer Reading

Client

Start Date
Jan 1st, 2024

Recurring ⓘ
Custom... ✓
Automatically recreate this work in the future

Assignees
✕ Kellie Parks search

Automatically add new assignees to unassigned

More Options ✓

Repeat Monthly ▾

Every 1 month(s) on:

Each

1	2	3	4	5	6	7	8
9	10	11	12	13	14	15	16
17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	

On the first ▾ Monday ▾

Recur 30 days in advance.
This is based on project's due date.

Cancel Apply

Done Close



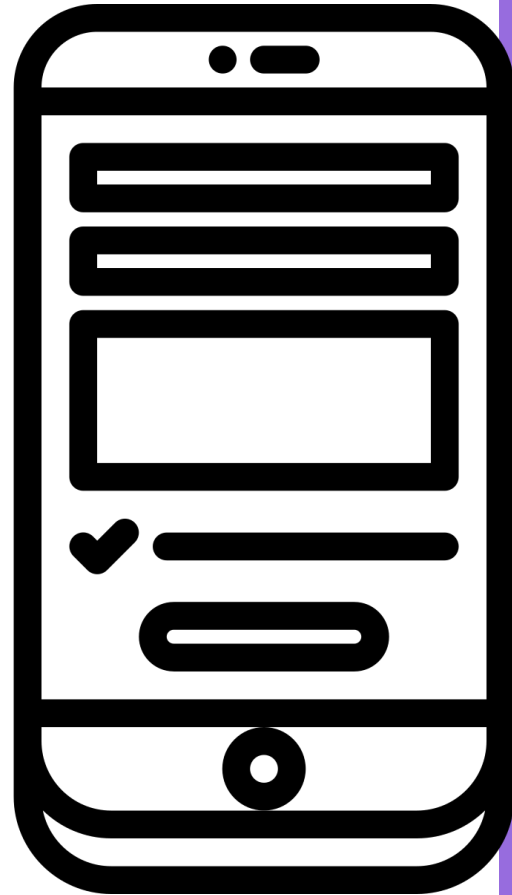
Draft emails

The screenshot shows an email composition window titled "Compose a New Message". The "TO" field contains "Kellie Parks (McClintock) x" and the "SUBJECT" field contains "Test draft email". The main body of the email contains the text "Draft emails to send later" followed by "so folks don't think you are available in off hours, and also gives you time to revisit with revisi". Below the text is a rich text editor toolbar with options for bold (B), italic (I), underline (U), font color, font size, bulleted list, numbered list, link, unlink, and templates. At the bottom left of the composition area, there are two buttons: "Send" and "Save Draft". A red arrow points directly to the "Save Draft" button.

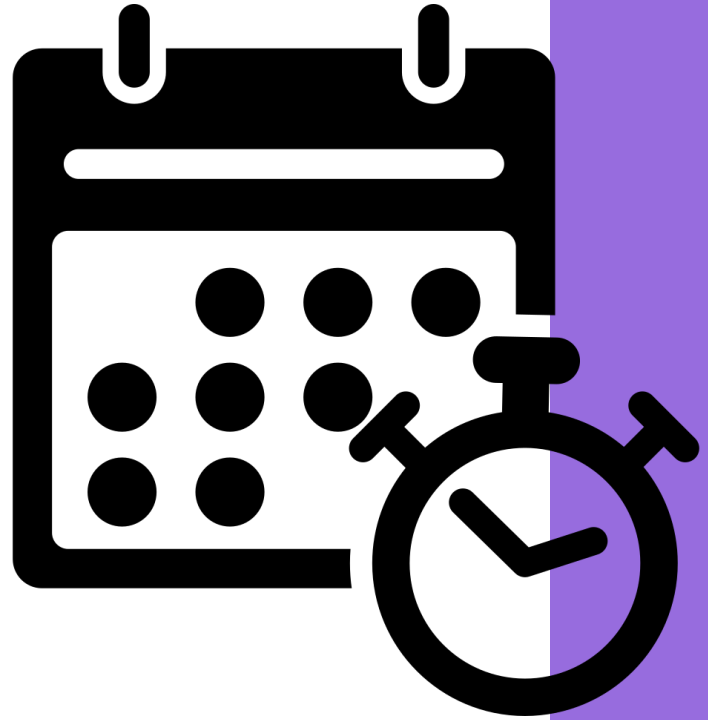


Other technology to set
expectations and
enforce boundaries.

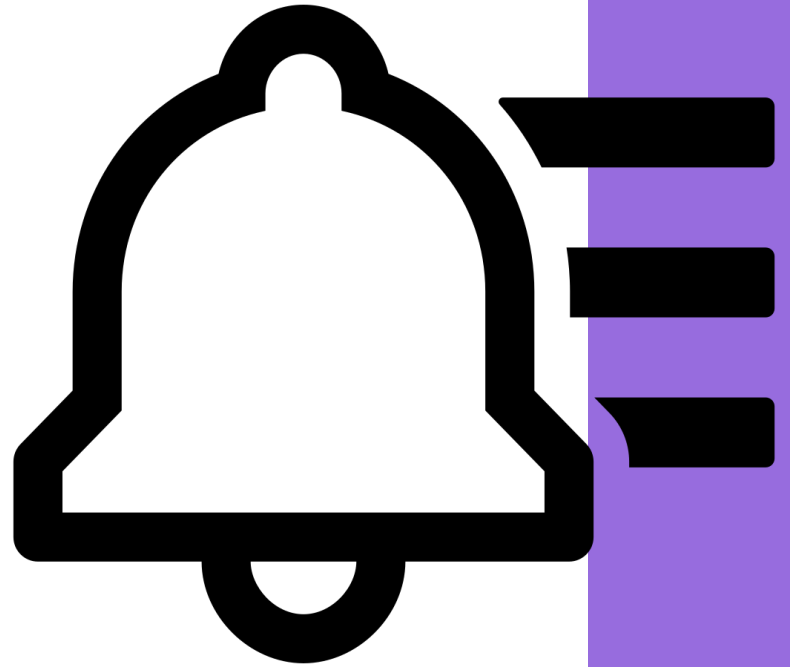
Build forms
with logic
jumps



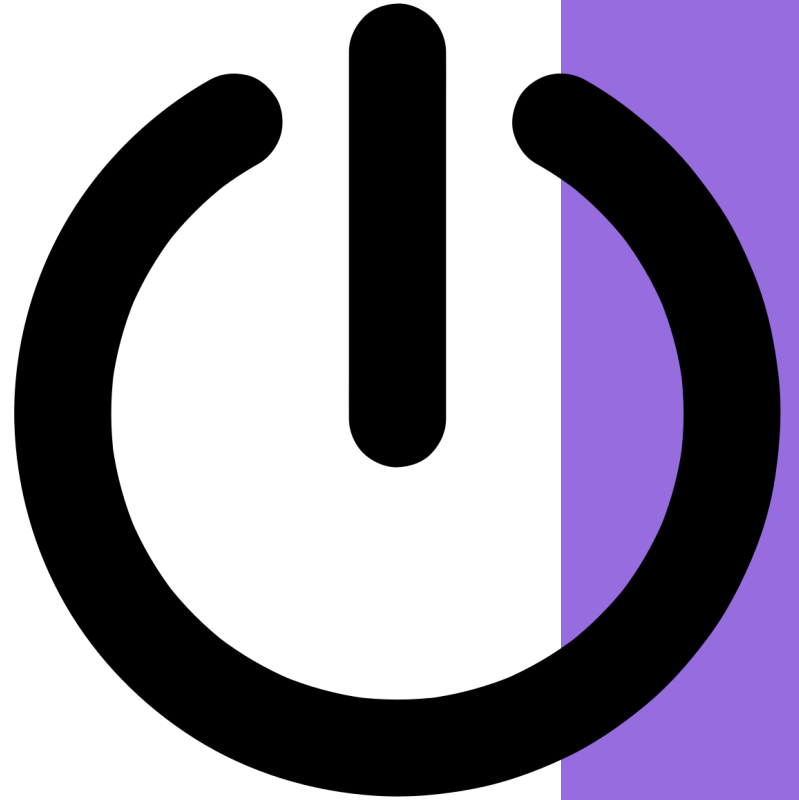
Use an
online
scheduler



Quiet
notifications
and use
schedules



Schedule
computer to
shut down
automatically



Use videos for
asynchronous
communication



Key Learnings/Takeaways

- Time and emotional bandwidth is finite
- Define and communicate your boundaries
- Use technology to manage boundaries



**Start a free 14-day
trial**

www.financial-cents.com



Dext

**Book a demo
today**

Link in livestorm



**I sell workflow templates specific to
Financial Cents.**

Code: DEXTFC for 25% discount

Thank you

