Embracing Paperless Efficiency and Modern Client Communication

- We're excited to announce TALK: a workflow solution Johnson & Associates is implementing at our firm.

- Why TALK? the benefit to you:

  - Submit <u>all</u> of your documents electronically

  - Store these documents for up to 10 years in an organized, secure, cloud-based program

  - Expedite data entry on our end to reduce costs to you

  - Track transactions and communicate in real-time using texting and a new mobile app

The Power of Contemporaneous Reporting

▶ Your various business transactions will be electronically linked to the system.

    ▶ All purchases, payments and income will be backed up automatically through the system in less than an hour after they are posted.

    ▶ This means we can code it into QuickBooks more accurately and efficiently and offer you valuable dashboard reporting about your business.

▶ If we need clarification on a transaction Johnson & Associates will send you a brief text message… on the same day the transaction occurred to accurately document the transaction while its still fresh in your mind.

    ▶ "What was this $37.28 transaction from 2 months ago for?" will never be a question you or I have to ask again.

    ▶ No more phone tag: respond to these texts at your convenience. If we haven't heard back from you in 24 hours, you'll receive a reminder.

Artificial Intelligence Doing The Work <u>For You</u>

Missed deductions are a thing of the past.

- We'll work together to "teach" the system about your business

    - You'll set up 'rules' about the vendors you visit: If you'd like every transaction made at Home Depot to be coded as "Job Materials," the TALK system will code these transactions accordingly each time you make a purchase through this vendor.

    - However, if you make a purchase at Fleming's Steakhouse, we'll confirm whether the meal was business related in real time; today, not tomorrow, or the end of the month.

- The computer keeps all documents and tasks organized

    - Both you and Johnson & Associates will have access to every single document pertaining to your business, available by a simple search, any time of day or night.

How It Works: 3 Ways To Send In Your Documents

You already have a phone, a computer and a scanner. That's all you need!

- We'll give you a unique 'upload email' – this is where you'll send any electronic receipts or relevant documents to our office.
  - This email communication is all completed automatically. Once you hit send, the attachments are uploaded to the desk of your bookkeeper at Johnson & Associates.
- On the go? Simply snap a picture of the document and text it to 520-276-1455.
- You will be given a "web portal" to organize and view all of your current and past documents. For added convenience you can simply click and drag PDFs. or images into the portal.

How It Works: Linking To Your Accounts

- In addition to the web-portal where you'll have access to all of your documents in a concise, organized manner, you will also have a free TALK app.

- This app allows you to link your business accounts. This will provide our office with real-time transactional data, rather than end-of-month statement uploads.

  - For example, if you had an open invoice for $105.97? The moment that amount is paid from your account it is reconciled efficiently in the appropriate credit/debit column of your financial statement.

  - Weekly and monthly reports just got significantly easier. We're saving time, which means you're saving money.

How It Works: Creating Tasks For Us

- The app also handles all simple clarification questions - when you get a notification just hit the TALK button to respond.

- Convenient mobile communication goes both ways

  - If there's something you'd like our office to do, the app will allow you to create a task for us! Even if its 3 AM, bright and early the next morning the appropriate person will have a "to do list" sitting on their desktop.