# Tech Tools

# Procluction ity

## Welcome



Formerly Nicole Teeter Bookkeeping & Business Services

# Housekeeping



## Being Busy and Being Productive are two VERY different things



Being busy is frantic while being productive is focused. Being busy is fueled by perfectionism while being productive is fueled by purpose.

Being busy is about being good at everything while being productive is about being great at a few important things.

#### Some of the things we will cover today are:

- 1) Time Management
- 2) Email Managing your email inbox
- 3) Calendars Ical, Google & Outlook
- 4) Planning for the week
- 5) Document storage
- 6) Applications and Software to help you1)CRM
  - 2)Zapier
  - 3)Scheduling
  - 4) Social Media Content Creation & Scheduling
  - 5)Practice/Business management
  - 6)Tools I use that may help you too

## Time Management



Take the time to learn how to make the most of your day by using prioritization, scheduling, goal setting, and other key time management skills, tools and techniques.

## **Time Blocking**

Time Blocking is a time management method that asks you to divide your day into blocks of time. Each block of time is dedicated to accomplishing a specific task or group of tasks and only those specific tasks should be completed in that block of time. With days time blocked in advance you won't have to constantly make choices about what to focus on.

#### 



Today < > September 2019

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Q (?) 🔅 Week - 🗰



#### Create A New Calendar

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September 2019	< >		7:50	7:50	7:50	7:50	7:50
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Birthdays	5 PM						
Client work	5 PM		Dinner & Family	Dinner & Family	Dinner & Family	Dinner & Family	Dinner & Family
Reminders	6 PM		<b>Time</b> 5 – 7pm	Time 5 – 7pm	<b>Time</b> 5 – 7pm	<b>Time</b> 5 – 7pm	Time 5 – 7pm
Tasks			p				p
Other calendars	Subscribe to calendar						
Holidays in Canac							
	Create new calendar						
	Browse calendars of ir	nterest					
	From URL						
	Import		_				

← Settings	
General	Create new calendar
Add calendar ^	Name
Subscribe to calendar Create new calendar Browse calendars of interest	Description
From URL Import & export	Time zone (GMT-04:00) Eastern Time - Toronto
Settings for my calendars	<sup>Owner</sup> teetersworkshops@gmail.com
<ul> <li>test test</li> </ul>	Create calendar
<ul> <li>Birthdays</li> </ul>	
<ul> <li>Client work</li> </ul>	
Settings for other calendars	

Settings for other calendars



### **Sharing Your Google Calendar**

## Share your calendar with specific users using Google Calendar

In the calendar list on the left side of the page, click on the 3 dots icon next to a calendar, then select **Settings and Sharing**. Enter the email address of the person you want to share your calendar with in the "share with specific people" section. From the drop-down menu on the bottom, select a level of permission, then click **Send**.



31 Calendar

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Today

< > September 2019 Q ⑦

**1** 

SUN MON WED THU FRI TUE SA Create 8 10 11 12 13 9 14 GMT-04 September 2019 < > 9 AM Client Client Client Client Client S Μ Т W Т F S Work Work Work Work Work 9am - 12p 9am - 12p 9am - 12pi 9am - 12p 9am - 12p 3 1 2 4 5 6 7 10 AM 8 11 12 13 14 9 11 AM 15 16 17 18 19 20 21 22 23 24 25 26 27 28 12 PM 2 3 4 5 29 30 1 8 9 10 11 12 6 7 1 PM Marketing Marketing & Social & Social Search for people Media Media 2 PM Client Client Client Client Client Work My calendars 3 PM  $\sim$ 2:30 - 3:30 Work Work Work Work 2:30 - 5pm 2:30 - 5pm 2:30 - 5pm 2:30 - 5pm test test My Time 4 PM 3:30 - 5pm Birthdays Client work 5 PM Dinner & Dinner & Dinner & Dinner & Dinner & Family Family Family Family Family Family Time Time Time Time Time 6 PM Reminders Tasks Subscribe to calendar Other calendars Create new calendar Holidays in Canac Browse calendars of interest From URL Import Terms - Privacy 11 DM



# Ical Calendar







## **Appointment Scheduling**

Saturday





#### Grow Your Business, Even While You Sleep

Try it for 7 blissful days absolutely free no strings, no credit card, no reason better than wanting work/life balance.

Freebie \$0 <sub>/mo</sub>	Emerging \$15 <sub>/mo</sub>	(Most Popularl) Growing \$25/mo	Powerhouse
Solo	1 calendar (just you at one location)	6 calendars included (staff/locations)	36 calendars included (staff/locations) <u>*</u>
Free Signup	Advanced Features	Advanced Features	Advanced Features
	Start Free 7-day Trial	Text Messaging	Text Messaging
		Offer Subscriptions / Memberships	Offer Subscriptions / Memberships
		Sell Appointment Packages & Gift Certificates	Sell Appointment Packages & Gift Certificates
		Start Free 7-day Trial	Custom API & CSS

#### www.acuityscheduling.com

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	Basic	Premium	Pro
	\$0 <sub>USD</sub>	<b>\$10</b> USD	\$15 USD
	totally free	per user / month	per user / month
Billed Monthly O Billed Annually	Sign Up	Sign Up	Sign Up
Features			
Calendar connections per user (	1 calendar / user	2 calendars / user	6 calendars / user
Calendar integrations with Google Calendar, Office 365, Outlook and iCloud	~	~	~
Schedule unlimited events	$\checkmark$	~	~
Event types 🕜	1 event type	Unlimited event types	Unlimited event types
Personalized Calendly link (e.g. calendly.com/janedoe)	~	~	~
Removable Calendly branding	×	~	~
Pooled availability options for teams (round robin, collective scheduling, multiple team members on one page)	×	~	~

eenshot

#### https://calendly.com



– **Inc.** Magazine

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### Tips To Organize and Minimize Time Spent In Your Inbox

- 1) Create an email signature
- 2) Use filters
- 3) Create email templates for emails that you send regularly
- 4) Create Labels
- 5) Unsubscribe to emails that you signed up for but never read
- 6) Use your auto responder
- 7) If you Gmail take advantage of some of the apps
- available in Marketplace



# **Gmail Vs Gsuite**

What is the difference between Gmail and G suite? **G Suite** accounts Unlike a standard Google or **Gmail** account, a **G Suite** administrator manages all accounts associated with each of these editions. **G Suite** provides access to a core set of apps that include **Gmail**, Calendar, Drive, Docs, Sheets, Slides, Forms, Google+, Hangouts Meet, Hangouts Chat, Sites, and Groups.

#### **Creating Labels in Gmail/Gsuite**

- 1) Scroll to the bottom of on the left column
- 2) Click More
- 3) Add Label
- 4) Name your label
- 5) Select which account you would like to be located under (optional)

Once you have created the label you can color code it by click on the three dots to the right of the label.





	✓ Insert signature before quoted text in replies and remove the "" line that precedes it.				
Personal level indicators:	<ul> <li>No indicators</li> <li>Show indicators - Display an arrow ( &gt; ) by messages sent to my address (not a mailing list), and a double arrow ( &gt; ) by messages sent only to me.</li> </ul>				
Snippets:	<ul> <li>Show snippets - Show snippets of the message (like Google web search!).</li> <li>No snippets - Show subject only.</li> </ul>				
Vacation responder: (sends an automated reply to incoming messages. If a contact sends you several messages, this automated reply will be sent at most once every 4 days) Learn more	○ Vacation responder off   ● Vacation responder on   First day: October 12, 2020   Subject: Out of Office Alert   Message:   Sans Serif マ				

If this is an urgent matter please reach out to admin@nicoleteeter.com.

We apologize for any inconvenience.

□ Only send a response to people in my Contacts

 $\Box$  Only send a response to people in Nicole Teeter Virtual Business Services



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Φ	Chats	Export Delete		
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0	Spam	You currently have no blocked addresses.		
Î	Trash	Select: All, None		
• <b>m</b>	Categories	Unblock selected addresses		
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test - +	Unblock selected addresses		
No Hangouts contacts Find someone	0 GB (0%) of 15 GB used Terms · Privacy · Program Policies Manage	Last account activity: 1 hour ago Details	

¢	When a message is an exact match for your search criteria:
	Skip the Inbox (Archive it)
	Mark as read
	Star it
	Apply the label: Choose label
	Forward it to: Choose an address  Add forwarding address
	Delete it
	Never send it to Spam
	Send template: Choose template
	Always mark it as important
	Never mark it as important
	Categorize as: Choose category 👻
	Also apply filter to <b>19</b> matching conversations.





## Templates

Email templates are used when you are creating the same email to your customers regularly. To save time create an email signature that can be easily modified.

You can create automatic replies using templates and filters together.

TIP – Be sure to proof read your email signature before sending it out.

#### Settings

General Labels Inbox Accounts Filters and Blocked Addresses Forwarding and POP/IMAP Add-ons Chat and Meet Advanced	Offline Themes	
Auto-advance Show the next conversation instead of your inbox after you delete, archive or mute a conversation. You can select whether to advance to the next or previous conversation in the "General" Settings page.	○ Enable	Oisable
<b>Templates</b> Turn frequent messages into templates to save time. Templates can be created and inserted through the "More options" menu in the compose toolbar. You can also create automatic replies using templates and filters together.	Enable	O Disable
<b>Custom keyboard shortcuts</b> Enable the ability to customize your keyboard shortcuts via a new settings tab from which you can remap keys to various actions.	$\bigcirc$ Enable	Disable
<b>Right-side chat</b> Move the chat box to the right side of the inbox.	○ Enable	Disable
<b>Unread message icon</b> See how many unread messages are in your inbox with a quick glance at the Nicole Teeter Virtual Business Services Mail icon on the tab header.	○ Enable	Oisable

~	Default to full screen	
	Templates	Þ
	Label	•
	Request read receipt	
	Plain text mode	
	Print	
	Check spelling	
	Smart Compose feedback	
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		~	Default to full screen	
INSERT TEMPLATE			Templates	•
Test			Label	•
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Delete template	•		Print Check spelling	
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# Microsoft Outlook

#### Add a Signature in Outlook



File	Home S	end / Receive	Folder View	Developer	Help Messa	ge 🛛 🖓 Tell me what you	u want to do
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	Clipboard	5	Basic Text	5	Names	Include	Protection

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Formal signatur	re		^	E-mail account:	hugo@contoso.com	
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Delete	New	Save	Rename			
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Calibri (Body) Hugo Dugas Marketing Man 273-555-0149 Contoso, Ltd.	nager				🗾 🛃 <u>B</u> usiness Card 🛛 🕁 🌐	

#### Add a logo or image to your signature

If you have a company logo or an image to add to your signature, use the following steps.

- 1. Open a new message and then select **Signature** > **Signatures**.
- 2. In the Select signature to edit box, choose the signature you want to add a logo or image to.
- 3. Select the Image icon , locate your image file, and select **Insert**.
- To resize your image, right-click the image, then choose Picture. Select the Size tab and use the options to resize your image. To keep the image proportions, make sure to keep the Lock aspect ratio checkbox checked.
- 5. When you're done, select **OK**, then select **OK** again to save the changes to your signature.

#### **Create And Use An Email Signature in Outlook**

Create and use an email signature

in Outlook



### Create Folders in Outlook

1) In the left pane of Mail, Contacts, Tasks, or Calendars, right-click where you want to add the folder.

2) Click New Folder

3) In the Name box, enter a name for the folder, and press Enter.





## Vehicle Mileage Tracker

Apps to Track Your Mileage Trip Log Driver's Note Mile IQ Stride Drive QuickBooks Online Mileage Tracker

# Accounting

Software









## Expense Management

## Tools

### Turn Paperwork into Data You Can Use Key Benefits

- 1) Monthly invoices and statements can be emailed directly to the application
  - 2) Never lose a receipt again
  - 3) Documents can be coded and attached to your

bookkeeping software

4) Fire proof



https://www.hubdoc.com/ Integrates with accounting software Single price point Code your expenses directly in platform Fetches bank and credit card statements Stores documents for 7 years Bank level security Hubdoc Video



Integrates with accounting software Single price point Code your expenses directly in platform Fetches bank and credit card statements Stores documents for 7 years Bank level security

https://www.receipt-bank.com/



https://www.expensify.com/

Great if you have employees who have expense reimbursements Integrates with accounting software









### pipedrive

Customer Relationship Management (CRM) is a strategy that companies use to manage interactions with customers and potential customers. CRM helps organizations streamline processes, build customer relationships, increase sales, improve customer service, and increase profitability.





# Have you heard the saying the money is in the list?



<u>https://mailchimp.com/</u> <u>https://www.zoho.com/campaigns/</u> <u>https://www.mailerlite.com/</u> https://www.activecampaign.com



### **Other Must Haves**



www.evernote.com

### A Rocketbook

www://getrocketbook.com



www.loom.com



#### https://www.17hats.com/

https://clickup.com/

### https://trello.com/

### https://www.teamwork.com/

### https://www.zoho.com/projects/



https://www.17hats.com/

ᅌ ClickUp

### Product Learn Pricing Contact Sales Login Sign up

## One app to replace them all.

All your work in one place: Tasks, docs, chat, goals, & more.





