

Customer digital administration onboarding emails



Communicating your firm's approach to digital administration is easy when you have the right tools in place.

Take a look at the following email series to help guide and transition new and existing customers to digital administration.

Email 1: Inform New customer



Tom from Smith's Accountants <tom.smith@smithsaccountants.com>
to new customer

Dear [Customer],

We're happy to welcome you as a new client, thank you for trusting us with your bookkeeping. We will do everything we can to support you in the best possible way.

This also means that we are highly committed to your digital administration, because we believe that digital administration is in your best interest.

Digital administration reduces the time you spend on your admin and financial tasks. No more writing up invoices, saving receipts and having to chase your customers for payment. With digital administration you will have more control, a better overview of your finances, whilst reducing the time and cost you spend on your admin tasks.

Needless to say we absolutely recommend digital administration.

Don't hesitate to contact us for more information. We're more than happy to advise and support your transition from paper based admin and finance processes to the simplicity of digital administration.

Kind regards,
Tom.

Email 1: Inform Existing customer, option 1



Tom from Smith's Accountants <tom.smith@smithsaccountants.com>
to customer

Dear [Customer],

As your accountancy firm, we're committed to giving you the best possible advice.

This is why we would like to inform you of the new tools available that will allow you to start using digital administration. One of the tools we highly recommend is Banqup.

Banqup is a user-friendly solution that allows you to manage your admin and finances on a single digital platform:

- Simply scan, upload or take a picture of receipts and invoices and see them straight in the Banqup platform.
- Create, send and even pay invoices using the Banqup app.
- House all your documents in one place - accessible anywhere, at any time.
- Store these documents for up to seven years, meaning you won't need folders or filing cabinets ever again.
- With one click of a button share your documents digitally with myself and the firm.

Digital administration tools reduce the time you spend on your admin and finance processes. Work with us to help you transition from paper based processes, to digital administration with Banqup.

Kind regards,
Tom.

Email 1: Inform Existing customer, option 2



Tom from Smith's Accountants <tom.smith@smithsaccountants.com>
to customer

Dear [Customer],

We would like to inform you of a new digital administration tool available to your business. A tool we highly recommend – which we also use ourselves – is Banqup.

With the user friendly tool of Banqup you can digitise your administration and enjoy these benefits:

- Securely store all your documents (invoices, receipts and contracts) in one digital place.
- Access your entire cash flow via one simple dashboard.
- Scan, take a photo or upload documents straight from the Banqup app.
- Easily create, send, follow up and pay invoices.
- Access anywhere, at any time using the Banqup app or online account.
- Easily share your documents and finances straight with our firm.

Digital administration will not only reduce the time you spend on your admin and finances, it will also provide you with the tools to gain more insights and more control over your business' finances.

Unsure of the additional workload of transitioning to a digital administration tool? With the right guidance and the right tools it will be a simple process. Plus, we will be with you for the entire journey.

Don't hesitate to contact us for more information.

Kind regards,
Tom.

Email 2: Convince Existing customer



Tom from Smith's Accountants <tom.smith@smithsaccountants.com>
to customer

Dear [Customer],

As your accountancy firm we're committed to giving you the best possible advice. That's why we're sending you this email about digital administration, which has a lot to offer and benefit your business.

Some of the benefits include:

Convenience

Your documents are available anywhere, at any time. You no longer have to worry about lost documents, typos or manual errors. Plus, you have the added benefit of being able to securely store all your documents digitally.

Control

You will always have an overview of your finances. You will have an up to date overview of your revenue, costs and outstanding invoices. Plus, you will receive reminders when a payment is near its due date, and be able to send automatic payment reminder notifications to your customers.

More time

With more digital and automated processes, you will reduce the time you spend gathering documents, entering data and checking document accuracy.

Cost effective

All these benefits save your business a lot of time and money.

The digital administration tool we recommend to make all these benefits happen is Banqup. Take a look at the Banqup website (www.banqup.co.uk) and join a free webinar if you want to know even more about the benefits.

Don't hesitate to contact us for more information. We're more than happy to advise and support your transition towards the simplicity of digital administration.

Kind regards,
Tom.

Email 3: Guidance & support Existing customer, option 1



Tom from Smith's Accountants <tom.smith@smithsaccountants.com>
to customer

Dear [Customer],

If you want to reduce the time you spend on your business' admin, and have a better overview and more control over your finances, then digital administration is for you.

We understand that the transition towards digital administration does require a bit of work, but we are here to help guide you on your way:

1. We recommend that you start as soon as possible as there is no time like the present! Digital administration is a new way of working. To get your business onboard, start by setting aside one day per week to work on your digitisation.
2. Start simple. Firstly, integrate a few invoices and a couple of receipts. Once you have got the hang of the Banqup platform, then start to increase your use. Take a look at the Banqup website (www.banqup.co.uk) and help videos for extra assistance.
3. Once you see how simple Banqup is to use, start to use the tool to create and send invoices.
4. If the Banqup link to our own accountancy software has been activated, we will automatically receive your documents. If you're not sure if the link is active, just let us know and we will look into it for you.

Follow these steps and your transition to digital administration will be complete in no time.

For more information, take a look at the Banqup guides and ways to get in touch with Customer Support.

Kind regards,
Tom.

Email 3: Guidance & support Existing customer, option 2



Tom from Smith's Accountants <tom.smith@smithsaccountants.com>
to customer

Dear [Customer],

We are glad to see that you are transitioning towards digital administration. We understand that the process can take a bit of getting used to, therefore we want to make sure we are supporting you as much as possible.

Take a look at our tips for a smooth transition:

- We advise you to start using digital administration as soon as possible. Digital administration is a new way of working and the best way to get started is to set aside one day per week to work on your digitisation.
- Start simple. Firstly, integrate a few invoices and a couple of receipts. Once you have got the hang of the Banqup platform, then start to increase your use. Take a look at the Banqup help videos to assist you.
- Then start to use Banqup to create and send your invoices.
- If the Banqup link to our own accountancy software has been activated, we will automatically receive your documents.

By following these steps, your digital administration will be up and running in no time.

Kind regards,
Tom.