



*“Yielding Success Through Financial Management”*

July 14<sup>th</sup>, 2020

Dear Client,

Over the last few months, we have had to make many adjustments in our office to ensure the safety of our employees. These adjustments have caused us to take on some new programs that have improved the efficiency of our office and will stick around in the future. We are writing this letter to notify you of these changes and how they will affect you. While we are implementing these new programs, they are by no means required, and you can still feel free to do things the way you have in the past.

There are three new programs that we are beginning to use. They are Microsoft Teams, Microsoft Bookings, and Intuit Practice Management.

**Microsoft Teams**

Microsoft Teams is a video meeting program, very similar to zoom. We will be using this program to host any future video meetings. You do not have to download the program in order to join a meeting. We would send you a link to the meeting, which you would be able to open online in your browser.

**Microsoft Bookings**

Microsoft Bookings is a program that allows you to schedule a meeting with your consultant online, instead of having to call into the office. **This can only be used for meetings at our office in Lincoln or video meetings. Meetings at remote locations will still be scheduled by your consultant.** There is a link to Bookings on both our website and Facebook pages.

When booking an appointment, you will have to follow these steps:

- **Select the type of service.** There are options for both in-person and Teams video meetings. A Teams video meeting will automatically create a Teams link for the meeting.
- **Select the preferred date.**
- **Select your consultant from the staff drop down box.** Depending on the date you have selected, it will say either available or unavailable of the right side. If it says unavailable, please select a different date.
- **Select the preferred time.**

- **Enter your details.** Your name, email address, and phone number are required. You will receive appointment reminders to the email address and phone number provided. If you do not have an email address, please call our office to schedule your appointment.
- **Click “Book”**

After booking, you will receive an email confirming the appointment. It will include a link to reschedule or cancel the appointment. This must be done at least 24 hours before the scheduled appointment time.

### **Intuit Practice Management**

We have started using Intuit Practice Management to help manage our work flow and improve communication in our office. One of the benefits this program provides is its ability to automatically send emails requesting the information needed for us to complete the services we provide to you. These emails will be from your consultant’s email address. When you click on the information it is requesting, it will take you to a website asking you to create a pin to access the page from other devices. After creating a pin, you can either reply to the request or upload a file.

In the past, some of you have used Intuit Link to upload your tax information to us. Intuit Practice Management may eliminate the need for Intuit Link in the future, however we plan on using a combination of the two for the 2020 tax year. Both Intuit Practice Management and Intuit Link are secure online portals, backed by our tax preparation software. We encourage you to use one of these programs, as they are both much more secure than simply emailing, texting, or faxing the information.

Sincerely,



Nebraska Farm Business, Inc.