



USE CASES

FROM ACCOUNTING & FINANCIAL
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TL;DR

- Automatic Lead Qualification for Tax Advisory Firm.
- Streamlined Amazon & QuickBooks Reconciliation for Outsourced CFO Firm.
- Instant Task Creation for New & Existing Clients.
- Automated Sales Tax Journal Entry for CPA Firm.
- Full-Client-Picture CRM Implementation for Financial Planning Firm.
- Tax Revenue Reporting for Mid-Size Firm

AUTOMATIC LEAD QUALIFICATION FOR TAX ADVISORY FIRM

A 10-person tax advisory firm serving medical professionals struggled with spending time on calls that rarely converted. Many prospects simply couldn't afford their services, yet every inquiry still meant a discovery call.

We designed and integrated a qualification form that collects key context before the call. Here's how it works:

- Prospects with revenue below \$400k are redirected to a resources page and added to the firm's newsletter.
- Prospects with revenue above \$400k are automatically sent to Calendly to book a call.

This system cut out unproductive conversations while ensuring qualified prospects got faster access to the team—making their calls more focused, valuable, and revenue-driven.

02

AMAZON-QUICKBOOKS RECONCILIATION IN MINUTES

Mod Ventures, an outsourced CFO firm, was spending 3 hours reconciling Amazon sales despite using A2X. Their team had to manually compare Amazon orders against QuickBooks entries to find discrepancies.

We built an automation that:

- Pulls Amazon sales
- Pulls QuickBooks entries
- Matches transactions
- Flags non-matches for review

The result? Reconciliation time dropped from 3 hours to just 15 minutes, freeing the team for higher-value work.

Adam, Fractional CFO, says:

“It went exactly as planned! I had no issues. It saved me at least 3 hours. I only expect this to increase in future months as I become more familiar with the process and reading the reconciliation reports.”

INSTANT TASK CREATION WITH IGNITION + CLICKUP

My Franchise CPAs, a nation-wide accounting firm for franchises, struggled with tasks slipping through the cracks after proposals were accepted.

We helped them:

- Implement Ignition for proposals
- Optimize ClickUp
- Link every deliverable to tasks with templates

Now, each accepted proposal instantly creates the right tasks with steps, time estimates, and assignees.

John Mollica, Co-Founder, says:

“This is huge. I now know that what I promised on the sale will never fall through the cracks – because every task is being transferred directly to the right place and to the right person, immediately.”

04

AUTOMATED SALES TAX JOURNAL ENTRY FOR CPA FIRM

Calculated Moves, a member of Jason Staats' Realize community, was already automating parts of month-end close. But sales tax journal entries still had to be created manually in each client's Xero account—a time-consuming, repetitive step.

We helped by:

- Optimizing Airtable to include all values needed for every client
- Building a Make.com automation to send entries directly to Xero
- Testing and validating the process end-to-end

Now, sales tax journal entries run automatically across clients, saving the team hours each month.

04

Donna, Founder of Calculated Moves, shares: “These automations help us save a lot of time and headache of busy work that we can automate and not have to worry about doing as part of our month-end process. Isaac and his team at Opzer were very prompt and did a fabulous job! I had a great experience—highly recommend!”

[Watch her talking about it here.](#)

FULL-CLIENT-PICTURE CRM IMPLEMENTATION FOR FINANCIAL PLANNING FIRM

A financial planning firm wanted their CRM (Wealthbox) to show a complete client picture—something they previously lacked, even though it was essential for regulatory compliance. They also spent too much time tracking clients and preparing proposals.

We helped them:

- Sync Calendly bookings into Wealthbox
- Auto-create & link client folders in Box
- Populate client data directly into PandaDoc proposals
- Update the CRM automatically when proposals are accepted

For a fraction of the \$50k they considered spending, the Pioneer team now has full client visibility and far less admin work—freeing them to focus on advising.

Their Director says:
“I was surprised about how much progress we made in the first few weeks. Automating some of these repetitive tasks so that people don’t have to remember... that’s been an aha moment for me. I’ve even gotten kudos for taking the lead on this. And it’s only taken an hour a week of my time, maybe less.”

06

TAX REVENUE REPORTING FOR MID-SIZE FIRM

A 50+ person tax & audit firm wanted to track tax revenue by senior, manager, and preparer likely for compensation and performance insights. They had already set up custom fields in QuickBooks invoices, but Zapier couldn't pull the data as needed.

We helped them:

- Extract the right data from QuickBooks
- Transform it with Google Apps Script
- Map it into Google Sheets for clear reporting

Working closely with managers and tax staff, we delivered an automated reporting system that gives leadership the visibility they need without manual workarounds.

TIRED OF CLUNKY, INEFFICIENT PROCESSES?

We help growing accounting firms replace manual work with smooth, highly automated systems.

By working with us on a monthly basis, you'll unlock more capacity from your existing team—through smarter systems, streamlined processes, and powerful automations.

Schedule a Discovery Meeting