

Dext

Case Study

Aloha Friday CPA

Enabling Creativity
through Innovation

Empowered onboarding
guarantees client success



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Jamie Boyack
CPA
Aloha Friday



About

Jamie Boyack is the face behind the brand [Aloha Friday CPA](#), an accounting practice that provides its services to creative entrepreneurs and small businesses in the U.S. and Canada. With their use of Dext, Aloha Friday CPA has generated a loyal and knowledgeable client base. By harnessing the power of Dext's easy-to-use interface, Aloha Friday CPA was able to save hours off of client work every month and enabled the practice to provide the insights their clients need to succeed in a hyper-competitive



Opportunity

Servicing unique and niche industries, Aloha Friday CPA required a digital platform that would allow their team to serve busy clients remotely. Working primarily with creative entrepreneurs and artists - clients typically don't have the in-house expertise or time to manage their books. Jamie needed to develop an easy-to-use and accessible workflow to ensure that Aloha Friday CPA could maximize the impact of the time they did have with their clients.

The ability to take photos of receipts and quickly upload the information to a centralized database became a need to have, especially when COVID-19 came onto the scene and remote work became the norm. Jamie required a tool that was easy to implement for both staff and clients - especially from a remote setting like Zoom. Forcing a hard-to-use tool that her clients would know how to or want to use would provide lacklustre results, so prioritizing user experience was at the forefront of her wishlist.

Even before COVID, the type of work that creative clients do requires a flexible and easy-to-use solution that would provide them with the opportunity to upload receipts, invoices, and other crucial financial information whenever the need arises.



Solution

For Aloha Friday CPA, they found the solution they needed in Dext. Dext provided the tool that they needed to power the remote tool that their clients needed to thrive no matter where they were. Having such a tool became even more critical over the last year when it was practically impossible to do business as usual. However, for Aloha Friday CPA, because they made the upfront investment into a software committed to their firm's and client's success, they were well-positioned to provide this necessary expansion of their clients' services.

With Dext in hand, Jamie and her team quickly provided the support her clients needed when applying for relief and ensuring their continued success throughout the pandemic. The feature-rich platform provided her with the



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tools she needed to serve her clients quicker without sacrificing quality. The easy-to-use mobile app gave her clients the ability to provide consistent and accurate information, allowing her to efficiently process and flag issues in Dext and Quickbooks. Utilizing invoice fetch, she was able to simplify common vendors like Amazon, making it easy for frequent purchases to get processed effortlessly.



Result

With Dext in their toolkit, Aloha Friday CPA reduced hours off their monthly client workflows, freeing up space for both more clients and opportunities to enhance the level of service they could provide current clients. For Jamie, the most crucial part is what Dext provides as a guarantee. Jamie shared, “What it provides is the ability to take away the assuming part of the equation; with Dext, you have the facts right there.”



Impact

As Jamie looks forward for Aloha Friday CPA, she is excited to continue the growth she and her team have experienced so far. Jamie wants to continue to provide the service for the creative energy that she has developed so far. With Dext in her corner, Jamie is optimistic for the future of her practice and prepared for whatever challenges may be on the horizon.

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