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“Insider Tips To Make Your Small Business Run Faster, Easier, And More Profitably”

Bay Area's Award-Winning IT & Cybersecurity



TruAdvantage Recognized for Excellence in Managed IT Services



5 ANNOYING TASKS YOU CAN AUTOMATE RIGHT NOW

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President of TruAdvantage

OUR MISSION:

To become a trusted advisor and strategic partner to the Bay Area's SMBs and help them solve their daily issues, optimize efficiency and security and grow a competitive advantage with IT.

Odds are that right now you're doing a handful of tasks manually that you don't need to, like sorting through an endless e-mail inbox. According to Microsoft, employees spend just under two hours daily on e-mail – that's more than eight hours a week spent in your inbox instead of on more creative or strategic projects.

But many businesses and employees have found a way off the relentless merry-go-round of to-dos: automation. By using software to manage repetitive tasks (without human intervention), you can complete your to-do list faster, spending less time on menial tasks and more time doing the projects you enjoy.

Task #1: Get Your Inbox To Zero (Without Wasting A Day Of Your Life)

E-mail is essential to our work today, but managing an overflowing inbox is an endless job. Automation tools, however, can quickly organize and prioritize e-mails, schedule responses and even convert e-mails to actionable tasks.

Here are a few ways to automate your e-mail tasks:

1. **Automating inbox organization.** In every mainstream e-mail platform, you can create filters and rules. Start by setting up filters in your e-mail to automatically sort incoming e-mails based on criteria like sender, subject

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1. or specific keywords. For instance, e-mails containing the word "invoice" can be directed straight to a designated folder.
2. **Use labels and categorization.** Most e-mail platforms have an automatic label feature that helps you categorize e-mails more dynamically than folders will allow. You can apply multiple labels to a single e-mail, making it easier to retrieve e-mails that may fall into several categories.
3. **Scheduling and automating e-mail responses.** Delayed send or scheduling tools automatically send your e-mails at predetermined times, which can be particularly useful for reaching recipients in different time zones. Write now, send later.
4. **Automate task creation from e-mails.** Automation services can integrate your e-mail with project management tools and automatically convert incoming e-mails into actionable tasks, so you never miss an important action item!
5. **Utilizing AI and advanced automation.** If you want to level up your e-mail automation, some automation tools let you use AI to label new e-mails based on their content, which can streamline how you prioritize and handle incoming messages.

Task #2: Hands-Off Appointment Scheduling

We're all busy people, but booking a meeting shouldn't require 10 back-and-forth e-mails. Calendar automation tools remove this annoying exchange by enabling people to book directly on your calendar and sending automatic event invitations and reminders.

With calendar automation tools, you can:

1. **Allow clients to book directly into your calendar.** With automated calendar tools, customers or team members can view your available time slots and book directly.
2. **Sync schedules across devices and team members.** These tools can also sync with most e-mail platforms, ensuring all team members are updated in real time when a time or location changes.
3. **Send automated appointment reminders.** Calendar tools also support sending automated appointment reminders. These can be customized to go before the appointment, reducing no-shows and making sure everyone is on time and prepared.

Task #3: Streamline Bookkeeping

Tracking the ins and outs of finances manually is tedious and can also be subject to more human error. Here are three ways automation improves bookkeeping:

1. **Automatically import and categorize transactions.** Automation software can automatically pull in and categorize transactions from your bank accounts and credit cards, dramatically reducing the need for manual entry and helping maintain cleaner, more organized financial records.
2. **Generate custom financial reports with one click.** Automated reporting tools also have robust capabilities for generating detailed financial reports instantly. These platforms allow for real-time insights into financial performance, enabling leaders to make informed business decisions quickly.
3. **Integrate with your bank and payment processors:** There are tools that also provide comprehensive integration with banking systems and payment processors that track cash-flow management and ensure that all transactions are automatically recorded and reconciled in your accounting software.

Focus On The Work You Enjoy

E-mail, appointments and bookkeeping are critical to running your work and business, but they don't need to be a mind-numbing time suck. Use simple automation tools to take manual tasks off your plate so you can focus on the creative and strategic parts of your business you enjoy most.

**FREE REPORT DOWNLOAD:
THE BUSINESS OWNER'S GUIDE TO IT
SUPPORT SERVICES AND FEES**

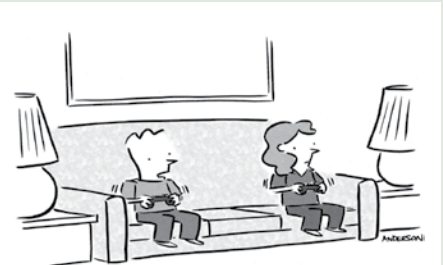


You'll learn:

- The three most common ways IT companies charge for their services and the pros and cons of each approach
- A common billing model that puts ALL THE RISK on you, the customer, when buying IT services; you'll learn what it is and why you need to avoid agreeing to it
- Exclusions, hidden fees and other "gotcha" clauses IT companies put in their contracts that you DON'T want to agree to
- How to make sure you know exactly what you're getting to avoid disappointment, frustration and added costs later on that you didn't anticipate

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**CARTOON OF
THE MONTH**



"It's interesting – Mom hates early Christmas sales, but she loves back-to-school sales."

GADGET OF THE MONTH

ATOMIC BEAR PARACORD BRACELET

If you've ever started an epic hike only to realize halfway through that *maybe* you've bitten off more than you can chew, you aren't alone. Unless you are alone...lost in the woods without a cell signal. Recommended by survivalists on Masterclass, a survival bracelet is a must-have for campers, backpackers or your little nature scout!

The Atomic Bear Cobra Survival Bracelet is not just for you, it's for your whole family. It adjusts from 8 to 10.5 inches, making it suitable for men, women and children. The bracelet combines four camping must-haves into one compact design: a fire starter (comprising a striker and ferro rod), a reliable compass, a loud emergency whistle and 12 feet of military-grade paracord. Add the Atomic Bear Cobra Survival Bracelet to your hiking essentials and embrace adventure with confidence.



MOST E-MAIL PLATFORMS STINK AT KEEPING OUT DANGEROUS E-MAIL ATTACHMENTS



In 2024, computer and network security company SquareX ran a study testing the effectiveness of popular e-mail platforms in keeping out e-mails with dangerous attachments. One hundred

malicious documents were sent through a third-party e-mail provider to platforms including Gmail, Outlook, Yahoo!, AOL and Apple iCloud Mail. What they found was that the majority of the harmful documents successfully evaded e-mail provider antivirus and malware scans. "It genuinely scared us that it was this easy," the company wrote. Remember, you are the last line of defense in your inbox. Never click on an attachment you weren't expecting, verify the sender before opening and ensure your device is protected with the most up-to-date security software.

DR. JORDAN PETERSON ON WHY CHALLENGE IS THE KEY TO A FULFILLING LIFE

Although it can be difficult, we don't protect our children from every challenge they face. We let them fail, learn and grow. Otherwise, they'd never really know what they are capable of. As adults, however, we tend to shy away from challenges, seeing them as obstacles to a better life. But clinical psychologist and University of Toronto professor Dr. Jordan Peterson warns, "All the avoidance in the world isn't going to save you from your fate... There are endless pathways to tragedy, and that's the basic condition of life in some ways."

It sounds hopeless, but Peterson explains that it's the opposite: people bold enough to face challenges head-on hold the key to unlocking life's most tremendous potential. Peterson has made significant contributions to psychology, religion, ethics and growth with his renowned books, including *12 Rules For Life: An Antidote To Chaos* and *Beyond Order: 12 More Rules For Life*. He recently spoke at an industry conference and explained how, by embracing difficult circumstances with an "upward aim," we have the opportunity to find true satisfaction and meaning while having the adventure of our lives.

How To Face Challenges With An Upward Aim

A bad boss, a fight with a loved one or even being let go from a job – it feels like something is always standing between us and happiness. But Peterson encourages us not to avoid challenges. By opening our eyes to them and mustering the courage to overcome them, we transform into better versions of ourselves and move closer to a more fulfilling life.

"That's how you find the pearl of greatness," Peterson explains. "You face up to the genuine catastrophes of existence, and what happens is you find out that you can do it... No matter how hard or how bad it gets, there's more to you than to whatever it is you have to face."

However, Peterson explains that when we face challenges, it's important to approach them with an "upward aim" or vision. This prevents us from becoming bitter or resentful during the process and lets us see the path through the challenge more clearly.



"You see the things that will help you, the things that will get in your way and the opportunities for transformation," he explains. "The aim specifies the landscape, and that's something remarkable to know."

If you're not clear on your aim or vision, Peterson suggests spending time thinking about these questions:

- If you could have what you need and want in work, life and your relationships – within reason – what would it be?
- What do you need to keep you going another day, another year?

We embark on a transformative journey by confronting our fears and flaws and taking responsibility for our actions. This practice of self-improvement benefits us and ripples out to our families and communities.

"Remember, everything you do is an up-aim ... The way you talk to people, the way you look at your wife, the way you greet your customers, the orientation for the money you make, your attitude toward yourself – every single bit of that, all devoted to that upward aim," Peterson says. "Then life reveals itself as an upward adventure – and that's the truth."

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SMARTPHONE SOLUTIONS FOR DESKLESS WORK

Business isn't happening exclusively in the office anymore. People work from almost anywhere and they're doing it from their phones. As more employees move toward a "deskless" work life, smartphones are no longer just communication tools but are the epicenter of many business operations.

According to a 2020 report by Emergence, about 80% of the workforce worldwide is deskless, meaning they don't have a traditional office or workplace. Many deskless employees are service techs, sales, retail, construction, or health care workers. However, data shows that 60% of deskless workers aren't happy with the tech that employers provide them, and a whopping 78% said technology is a crucial factor when choosing a job. Embracing a mobile mindset isn't just a business advantage – it's essential to staying productive and competitive.

Support Your Workforce With Mobile Apps

With just a few taps on a smartphone, your team can clock in, communicate, manage tasks, revise documents and stay connected, regardless of their physical location.

Productivity Apps: Project management tools revolutionize team collaboration, allowing for real-time updates and seamless coordination.

Mobile Payments: Payment apps make transactions smoother, more secure and more flexible to customer preferences, supporting sales anywhere, anytime.

Operations Management: Operations apps track inventory in real time. These tools are crucial for maintaining accuracy and efficiency in inventory management, and they can be used directly on a smartphone.

Marketing: Engage with audiences through mobile-first marketing apps that let marketing teams craft and monitor campaigns from their phones, including managing social media activity, scheduling posts and tracking engagement across platforms.

CRM And Sales Enablement: CRM platforms ensure that customer information and sales tools are always in your team's pocket so they can access detailed contact

insights, pipeline management and sales actions anytime.

Keep This In Mind Before Buying

First, check that an app is compatible with your existing systems. Then, make sure it's customizable to fit your business processes and requirements. You'll also want to consider the app's cost, including any initial setup fees and ongoing subscription charges, to ensure it's within budget. Above all, security is paramount, especially for apps that handle sensitive data, like payment apps. Look for robust security features and compliance with relevant industry regulations.

Enhance Business With Deskless Tech

For business leaders navigating today's versatile work environment, integrating mobile apps into daily operations is not just for the fully deskless workforce. It's a forward-thinking move for any company aiming to streamline workflows and stay competitive. By providing the right tools that work as effectively on the go as they do at a desk, leaders can future-proof their businesses, ensuring their team has the resources they need to succeed in the increasingly mobile-centric world of work.