Hey Bookkeeping Buds,

It was great to officially meet you all at the Bookkeeping Buds retreat last week! Thank you so much for having us and allowing me to share the **6 Pro Tips to Elevate Your Firm Using Keeper**with the Buds.

I shared a lot of information there, so I wanted to follow-up with a few resources to help as you begin to explore these advanced features:

* **Prepare 1099s Report -**Don't go to the hospital: Use Keeper's [Prepare 1099s report](https://help.keeper.app/en/articles/6365675-prepare-1099s) to help identify 1099-eligible vendors and collect W-9s so you don't have to scramble before the end of the year.
* **Chrome Extension -**[Keeper's Chrome Extension](https://help.keeper.app/en/articles/7145504-keeper-s-chrome-extension) allows you to Ask Client Questions from anywhere (including from within your QBO bank feeds!)
* **Clickable Links for Training -**Don't forget that you can add clickable links (website URLs) to your Task Descriptions! Really helpful for navigation purposes (in case you need to jump out to a website like your client's bank website, etc.), but **FANTASTIC** for training purposes because you can drop your video recording link (Loom, Zoom, ScribeHow, etc.) in that Task Description so your team will always have reference for how that task should be performed.
* **Executive Summary & KPIs -**The [Executive Summary](https://help.keeper.app/en/articles/6173270-the-executive-summary) is an important part of your clients' management reports as it quickly summarizes the "high notes" (i.e. Revenue and Net Income/Loss) and allows you define Key Metrics (KPIs) that are relevant to your specific clients. Checkout the short video included [here](https://help.keeper.app/en/articles/6352597-metrics) for a walkthrough of common Metrics and how to build those in Keeper.
* **Schedule Requests -**Stop sending emails each month to request bank statements and credit card statements. Instead, [schedule those Non-Transactions questions](https://help.keeper.app/en/articles/6177158-non-transaction-questions#h_eaea02fb77) to be added to the portal automatically.
* **Engage the Community -**Join the 2k+ members of [Keeper's Facebook community](https://www.facebook.com/groups/keeperusers) today! Add our monthly [Catch-Up With Keeper webinar](https://us02web.zoom.us/webinar/register/WN_bw-SRNzMQ2eLVzNmND8-tA#/registration) to your calendar to learn about new features and ask questions! Browse [Canny](https://keeperapp.canny.io/) to 'vote' for your favorite feature requests or make requests of your own.

Please don't hesitate to reach out to me or our support team (live chat in the bottom right corner of your Keeper screen) if you have any questions along the way!

Thanks again,

**Chad Pues, CPA**

Account Executive @[Keeper](https://www.keeper.app/) Schedule Your Personalized Demo [here](https://calendly.com/keeperchad/30min)