



# Automating Workflows for School Spirit Vending

School Spirit Vending (SSV) is a nationwide school fundraising program that has raised over \$5 million for schools via its hassle-free, year-round business model.

With over 3,000 participating schools and 60 franchisees, managing the revenue reports, royalties, and invoicing processes became a time-consuming task for its founder, Matt Miller. In an effort to alleviate this burden, Matt sought our assistance to help him with automating points of inefficiency in administrative workflows.

This case study will detail how TAG AI utilized a combination of Jotform, Google Sheets, Zapier, Freshbooks, and WordPress to create a robust and seamless automation system for SSV's royalty reporting, calculations, billing, and tracking. The finished automation resulted in significant time and cost savings

## Challenges Faced by School Spirit Vending

Before implementing automation, SSV faced several many time-consuming tasks in managing the administrative side of their business:

- \* **Data Collection and Processing:** Every month, franchisees had to submit sales data through a form. However, manually collecting and re-entering this data into multiple other documents, such as spreadsheets and accounting software, was time-consuming and potentially error-prone.
- \* **Custom Royalty Calculations:** Some franchisee paid different royalty rates based on their franchise agreement. Creating a system to handle custom royalty calculations for different franchisees was a complex task.
- \* **Invoicing and Payment:** Once the royalties were calculated, the process of generating invoices and tracking payments was manual, leading to delays and potential payment issues.
- \* **Record-Keeping:** Maintaining a record of all submitted data and financial transactions was essential for SSV's financial reporting and decision-making. However, managing this data efficiently was a monthly challenge.

- **Jotform Data Entry and Calculation:** TAG AI created a form with fields for franchisees to enter sales data each month. Jotform's powerful integrations enabled automated math calculations based on the entered data. Custom royalty calculations were also implemented to ensure accurate payments for each franchisee.
- **Data Storage with Google Sheets:** The sales data from Jotform was seamlessly integrated into a Google Sheet, serving as a permanent record of all submitted data. This record can also be converted into meaningful reports, providing insights into sales trends and revenue patterns.
- **Zapier Integration:** Zapier was implemented to trigger automated actions whenever new data triggered an action. This ensured that every update or new entry would initiate subsequent steps in the automation process.
- **Invoice Generation with Freshbooks:** Upon data submission, Zapier ingested the data and connected to Freshbooks. Utilizing Freshbooks' comprehensive invoicing features and Zapier's fine controls, invoices were generated automatically and error-free with the calculated royalty amounts for each franchisee.
- **Payment Handling and Communication:** Freshbooks allowed franchisees to receive invoices and pay via PayPal directly through the platform. Additionally, both the franchisee and SSV were notified about the new royalty report, ensuring transparency and efficient communication.
- **Monitoring and Reporting:** Freshbooks enabled Matt to easily track which franchisees had reported and paid their royalties, streamlining his follow-up process. The automation also facilitated easier payments for franchisees managing multiple companies.

## Automation Solution

TAG AI proposed an automation solution that leveraged the existing software stack used by School Spirit Vending and introduced Zapier to enhance integration and automation capabilities. The steps above give a high-level outline of how the automation process works.

## Benefits and Outcomes

The implementation of the automation system had a profound impact on School Spirit Vending's operations, providing numerous benefits and outcomes:

- ✓ **Time and Cost Savings:** By automating the entire revenue reporting workflow, royalty calculation, invoicing, and payment process, Matt now personally saves over 25 hours per month, totaling more than 1,100 hours over three years. Additionally, the efficiency built into the system saves an estimated \$6,000 per year by reducing manual labor and associated costs.
- ✓ **Accuracy and Consistency:** With manual data entry eliminated, the automation system significantly reduced the likelihood of errors and discrepancies in financial records. Custom royalty calculations also ensured accurate payments for each franchisee.
- ✓ **Seamless Scalability:** The automation system was designed to accommodate new franchisees or retiring ones easily. As SSV expands its network, the system easily adapts to the changes.
- ✓ **Enhanced Data Insights:** The Google Sheets record of all submitted data provided valuable insights into sales trends and revenue patterns, empowering SSV to make data-driven decisions. And the integration of Freshbooks account tracking helps SSV to collect royalties faster and with less effort.
- ✓ **Improved Communication:** The automated communication process ensured prompt notifications to franchisees and Matt whenever new royalty reports were generated, enhancing transparency and timely action.
- ✓ **Sustainable Efficiency:** The automation system proves to be stable and consistent, running without major complications for over three years. It has become a reliable backbone for SSV's financial operations.

## Conclusion

The successful automation of administrative workflows at School Spirit Vending exemplifies how identifying and automating points of inefficiency can lead to significant time and cost savings.

Utilizing Jotform, Google Sheets, Zapier, Freshbooks, and WordPress, TAG AI designed a sophisticated system that streamlined data entry, calculation, invoicing, and payment processes. The results were transformative, freeing up Matt's time and SSV's resources, ensuring accuracy and consistency, and providing valuable data insights for informed decision-making.

TAG AI's approach to automating administrative workflows demonstrates its potential to benefit a wide range of businesses, eliminating manual work and maximizing efficiency. By embracing automation technologies, businesses can optimize their operations, boost productivity, and focus on their core objectives with greater confidence and success.

If you'd like to discuss how TAG AI can automate repetitive and complicate tasks in your business, grab a time to speak with Jeff in his scheduler: <https://tagaimedia.com/schedule/>