Crayon Advisory, LLC
Auxiliary Software Details – December 2023

Aux Consent Section	Software Name	Contains PII	Necessary	How Used/Purpose	Effect or Impact of Not Opting In	Minimum Fee if not Consenting
Auxiliary Software - Information Gathering	Moxo	Yes	Yes	Secure Client Portal used to gather information and deliver tax returns and other deliverables.	Information will need to be gathered using a different method. You will not receive specific steps to take and communications will not be consolidated to a single location.	185
	Cognito Forms	Yes	Yes	Collect Specific Information. Beginning in 2024, Cognito will no longer be used to gather sensitive information.	Questions will need to be copied/pasted into another form or format for and to you. These questions will be provided to based on your preferences.	85
	Zoho Sign	Yes	Yes	Secure eSignature Platform offering KBA based eSignatures. Provide you with eFile Authorization and the ability to eSign said authorization.	We will provide you with your eFile Authorization through Moxo which you will then need to print, wet sign, and upload to Moxo.	85
Auxiliary Software - Internal Processes	Zapier	Non-Sensitive Only	Yes	Zapier moves information from one system to the next through specific, "Zaps." Zaps never have access to sensitive information. This is primarily moving information between Cognito Forms, Coda, and ClickUp. The Zap moving data from Cognito Forms to Coda asks for your consent prior to the move.	In instances in which we cannot avoid a Zap, your PII will be anonymized so we can still use other data necessary for tracking in our systems. Your PII will also be anonymized in Coda and ClickUp. You will also be impacted by the Coda and ClickUp effects of not opting in to this software.	185
	Coda	Non-Sensitive Only	Yes	Customer Relationship Management (CRM). Coda holds names, email addresses, and the relationship you have with Crayon Advisory.	You will not receive certain automated or welcome emails. Your PII will be anonymized so we can still use other data necessary for tracking in our systems.	185
	Clickup	Non-Sensitive Only	Yes	Our project management software also keeps you up to date on the status of your tax return. You will receive reminders of actions you need to take and/or information you need to provide.	You will not receive automated or semi-automated updates on the status of your tax return. We do not provide manual updates. You will not receive automated reminders on information we need or actions you need to take. We may provide additional manual requests at irregular intervals. Your PII will be anonymized so we can still use other data necessary for tracking in our systems.	185
	Reclaim.ai	Non-Sensitive Only	Yes	Reclaim reads our Calendar (based on/at Google Calendar through Google Workspace) and receives details from ClickUp through a direct integration. It's also our primary tool for booking meetings.	To book a meeting, you will have to interact directly with Megan's timeblindness. Your PII will be anonymized across Coda, ClickUp, and Google Workspace because of the direct integrations. You will also be impacted by the Coda and ClickUp effects of not opting in to this software.	185
	PDF.co	Non-Sensitive Only	Yes	Automates printing of certain emails to PDF. Never receives sensitive PII.	Certain emails will not be automatically turned into pdfs. We use the pdfs for our required documentation purposes and will instead need to manually create these pdfs	85
	Freshbooks	Non-Sensitive Only	Yes	FreshBooks is our billing software. It's what we use to generate invoices.	We will have to provide you with an alternative payment method. Your PII will also be anonymized in the software so we can use other necessary data within FreshBooks.	85
Auxiliary Software - Document Management & Creation	Google Workspace	Yes	Yes	Google Workspace is the entire Google environment and includes Gmail, Drive, Docs, Sheets, Forms, Contacts, AppSheets, and more. Sensitive PII is only used when absolutely necessary (i.e. document storage for our due diligence/documentation requirements). We use the, "Business Plus," plan of Google Workspace.	We will need to work outside of our normal systems, including using tools to double-check our work as well as tools to prepare and provide summary and comparison reports to you. This means we'll end up moving slower so we can double-check our work. You also won't receive summary or comparison reports.	185
	FoxIt PDF Editor	Yes	Yes	Foxit is our main PDF editor and viewer. We use this to open documents you provide, make necessary and relevant notes on them, and compile all the documents used during tax return preparation into one file we retain for our documentation requirements.	We will need to work outside of our normal tools. We may need to, "kick back," certain documentation you provide to us to clean, re-sort, or reorganize so that we can use the pdf in a very simple viewer.	85
	TallyFor	Non-Sensitive Only	Potentially	We use TallyFor to analyze and reorganize the business activity. We also use it for our tax projectsion and planning services.	Depending on your business activity, preparation of this part of your tax return may become significantly less efficient. We will need to use alternative, more expensive projection/planning software. If you choose not to consent to the use of this software and it becomes necessary in the course of providing services to you, we will contact you with your options.	225
Auxiliary Software - Help & How-To	Loom	Non-Sensitive Only	No	We use Loom to create screen-recorded videos. Some of these are generic and include no PII. Some of these may be specific to you and your situation, particularly if/when there's a longer email or bigger question to answer. We don't use Loom to screen record sensitive PII.	Minimal. We won't be able to create a personalized walk-through email video or tech support outside of Moxo.	-
	BlueDot/Twisio	Non-Sensitive Only	No	We use BlueDot to create screen-recorded videos. Some of these are generated for all clients and thus have no client's PII. It may become convenient to prepare a screen capture video specific to your situation, particularly if/when there's a longer email or bigger question to answer. We don't use BlueDot/Twisio to record sensitive PII. BlueDot/Twisio also provides transcripts during meetings. Even if you consent to the use of this software, you will be asked for consent prior to recording any virtual meetings and an in-app notification before the recording starts.	Minimal. We won't be able to create a personalized walk-through email video or tech support outside of Moxo. If we are unable to record meetings with you, we may decline the meeting. If we do not decline, we will not be able to provide a specific record of what was discussed.	-
	Tango	Non-Sensitive Only	No	We use Tango to create how-tos and introductions. In some cases, these are created specific to your needs and may include non-sensitive PII. In those instances, you're the only one receiving Tango.	We won't be able to create personalized, non-anonymized Tangos for you.	-
Auxiliary Software - General Communications	Superhuman	Non-Sensitive Only	Yes	Superhuman sits on top of Gmail. If you remember WinAmp, it's like a skin that makes Gmail look and act a little bit different (a little bit cleaner and more productive).	We will be unable to communicate with you via direct email because of the direct integration. Any communication we send will have to be sent via the portal or automated processes.	185
	Google Voice	Non-Sensitive Only	Yes	Our phone is hosted through GoogleVoice.	We will be unable to have phone calls with you or tax agencies if you are in need of representation services.	-
	MetroFax	Yes	No	We rarely use the fax, "machine." In fact, we only ever use it to communicate with tax authorities. Most now have the ability to provide them with information via a secure portal, which we default to.	In the event you are in the need of representation with a specific tax authority, we will be unable to send them information via fax. We will attempt to send them information via secure portal instead. This isn't always possible. In these cases, you will have to work with the tax authority itself and/or information will need to be mailed.	-
	SoWork	Non-Sensitive Only	No	We use SoWork to host certain types of meetings, primarily when multiple clients may or are expected to be present and we need and want to provide a level of anonymity to our clients from each other.	You won't be able to attend group virtual meetings. While these are primarily offered to business owners, these may be offered during tax season as an opportunity to, "body double," with others doing something similar to you. If you opt out and we host one of these meetings, you will not receive an invitation.	-

This document is created with the intent of showing additional details regarding Auxiliary Software used by Crayon Advisory, LLC as of December 2023. This may be updated from time to time as necessary and relevant.