

Maximizing returns: **NurkinCPA boosts productivity by 200% with Zoho Creator**



Table of Content

03 The company

04 The challenge

06 The solution

09 Benefits and ROI

11 Looking forward

12 About us

The company

NurkinCPA is an Israel-based tax firm specializing in U.S. income tax planning and tax compliance. With over 35 years of experience, they provide their services for U.S. tax residents living across the globe and Israeli individuals/companies with businesses in the United States.



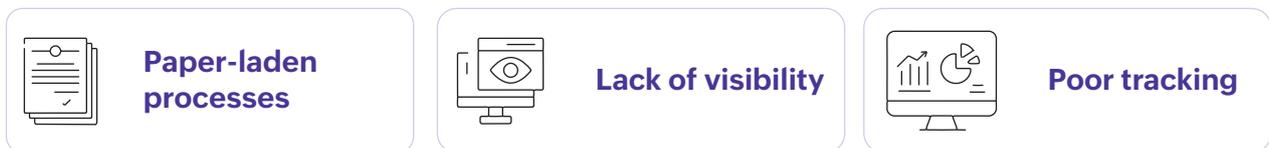
Their specializations include corporate tax returns, partnership and trust tax returns, IRS audits, ITIN applications, and EIN applications.

We interviewed David Beychok, the CEO of NurkinCPA, to learn how they utilized Zoho Creator and transitioned from being paper-based to fully digital.

The challenge

Imagine having to file taxes for thousands of people. Now, imagine the process for filing taxes for thousands of people across 7 departments, being managed entirely on paper. That's what was happening at NurkinCPA. Their sales, production, tax team, pre-prep team, support, accounting, and billing were working exclusively on paper and spreadsheets.

Their three biggest challenges were:



They would print all the documents provided by the customer, put them in a folder, and store them alphabetically on a shelf. At any given time, they could have hundreds of customers' folders in process.



We were using a lot of trees. At any given time we could have five hundred customers in progress and somebody has to go physically pull down a pile off the shelf and start sorting through all these folders. It was ridiculous!



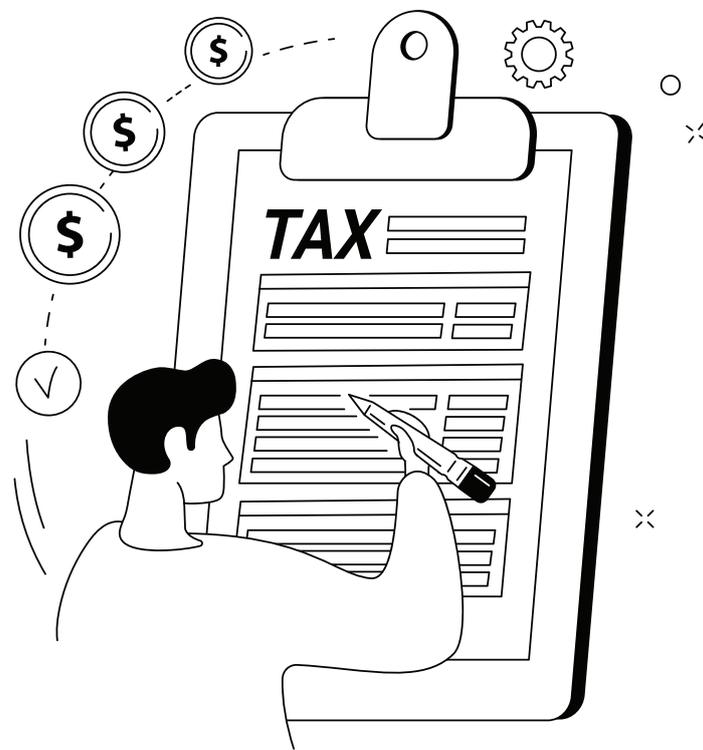
- David Beychok, CEO



This made it difficult to track progress, answer customer questions, and manage the workload. They also struggled to determine which employees were working on which tasks and manage the entire process efficiently.

Another challenge was the need to interact with customers who often had missing documents or other issues. Moreover, there was a lack of certainty as to whether customers had received requested emails or were responding to them, which further complicated the process.

As they grew, the problem became even worse, with the potential for thousands of folders on the shelf. This triggered the decision to switch to a more automated system with a portal for clients. This new system would assign jobs to people, track progress, and streamline the process, eliminating the need for printing and making it easier to manage communication with customers.



The solution

Beychok evaluated Salesforce, HubSpot, and a few local off-the-shelf solutions. However, none of them seemed to align with the organization's specific needs. He eventually discovered Zoho Creator through an old colleague, found a reliable partner, and the NurkinCPA self-service portal was ready in less than five months.

Zoho Creator's ability to facilitate easy changes was a significant factor in the decision-making process. Another important factor was Zoho Creator's integration capabilities with external systems. Beychok said, "We were able to successfully implement and integrate other tools that were needed to manage our processes with Creator. It was crucial for us to have a system that didn't confine us."

The NurkinCPA self-service portal makes the process of filing taxes easy and hassle-free for customers. The portal provides easy-to-use forms and allows customers to upload necessary information and documents. It also has video tutorials, FAQs, a sample document section, and status bars to help customers have a seamless tax filing process.

The screenshot shows a web browser window titled "Tax Filing Application" with a user profile for "dbeychok". The form contains the following fields and questions:

- Reporting Type:** Tax Return & FBAR (dropdown)
- Accounting Year:** 2022 (dropdown)
- Profession:** Project Manager (text input)
- Spouse Profession:** Doctor (text input)
- Address Change:** Has your address changed during the tax year (new customers please choose yes)? Yes No
- Family Status:** Has there been a change in your family status in the tax year? Yes No
- Withdrawals:** Did you make any withdrawals from a keren hishtalmut, pension, or gemel during the tax year? If yes, then please upload the end of year report via the upload documents tab or the FBAR tab. Yes No
- Maternity/Unemployment:** At any time during the tax year, did you receive maternity or unemployment payments? If yes, please upload documentation from Bituach Leumi (see Upload Documents). Yes No
- Virtual Currency:** At any time during tax year, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency (like Bitcoin)? Yes No
- Additional Income:** Did you have any additional income in the tax year that you did not have in the prior tax year? Yes No

An "Introduction Video" button is located in the top right corner of the form area.

Video Tutorials

Dashboard | Sample Documents | Video Tutorials | Contact Us

All Video Links

Introduction & Sign Up to Portal	Introduction Video
How to Load Documents	Upload Docs Training Video
How to Populate FBAR Template	FBAR Training Video
Reporting Children (8867)	Report Children Training Video
How to Complete the To Do Task List	To Do List Training Video
How to Report a Rental Property	Rental Property Training Video
How to Report a Corporation	Corporation Training Video
How to Report an Inheritance or Gift	Inheritance/Gift Training Video
How to Report Sale of Property	Sale of a Property Training Video
How to Add a US Bank Payment	US Bank Account Training Video
How to Report an Estimated Tax Payment	Estimated Tax Payment Video

Adding New Account

Dashboard | Sample Documents | Video Tutorials | Contact Us

Name: Asher & Chana Test | Year: 2022 | Status: New | Completion % (14)

System Message: FBAR Required, Children Reporting, Rental Property, US Bank Account, Current Tax Year Prepayments, Rental

US Bank Account

Pre fill US bank account from previous account: -Select-

Name of Bank: CAPITAL ONE

Routing Number: 123456789

Account number: 8113522078

What type of account it is? Checking Saving

Submit | Reset

US Bank Account Training Video

After the tax return is submitted to the authorities, customers receive a notification and can view copies of their tax returns on the portal. NurkinCPA also uses the portal for reports, tracking customers who are in a new status and haven't finished. Reports can be generated in PDF or Excel format, and reminders can be sent to any customers. The platform even accommodates different formats, such as PDFs, JPEGs, Word documents, and Excel files, making it easy for customers to upload their documents.

Video Tutorials

Dashboard Sample Documents Video Tutorials Contact Us
dbeychok

Name : Asher & Chana Test Year : 2022 Status : New Completion % (14)

System Message - FBAR Required, Children Reporting Required, Please upload Form 106 / W2, Form 867, Us Bank Account, Current Tax Year Prepayments, Rental Property

Basic Info ✓
Documents ✓
FBAR ✓
Report Children ✓
Rental Property ✓
US Bank Account ✓
Estimated Tax Payments ✓

Edit

Please select the type of reporting for the current tax year	Tax Return & FBAR
Accounting Year	2022
Profession	Project Manager
Spouse Profession	Doctor
Has your address changed during the tax year (new customers please choose yes)?	No
Please elaborate	
Address	📍 Israel, Israel
Has there been a change in your family status in the tax year?	No

Admin Report

Tax Filing Application Dashboard Sample Documents Video Tutorials Contact Us Parent Customer Employees
David Beychok

All Tax Reporting * + Add

SEARCH Name contains "test"

Name	Created/Edited Date-Ti...	Year	View	Tax Return/FBAR	Filing Sta...	Staff Sta...	Change Staff Status	Assignee	Assign User	Reassign User	Sync to WD
test for yaali	26-Aug-2022 14:56:05	2021	View	Tax Return/FBAR	Submitted		Change Staff Status	Waiting - Bin	Assign User	Reassign User	Sync to WC
Jake Jones Test	25-Jul-2022 14:43:35	2021	View	Tax Return/FBAR	Submitted		Change Staff Status	Avishai - B	Assign User	Reassign User	Sync to WC
Herman Harp Test	19-Jul-2022 13:57:49	2021	View	Tax Return/FBAR	Submitted		Change Staff Status	Avishai - B	Assign User	Reassign User	Sync to WC
Sandra Petrov Test	04-Jul-2022 12:44:31	2021	View	Tax Return/FBAR	Submitted		Change Staff Status	Avishai - B	Assign User	Reassign User	Sync to WC
JANA YAALI TEST	15-Jun-2022 11:26:08	2021	View	Tax Return/FBAR	Completed	Closed	Change Staff Status		Assign User	Reassign User	Sync to WC
David Parent Test	04-Apr-2022 17:13:33	2021	View	Tax Return/FBAR	Pending		Change Staff Status		Assign User	Reassign User	Sync to WC
Sandra Sun Test	25-Aug-2021 13:21:03	2020	View	Tax Return/FBAR	Submitted		Change Staff Status	Avishai - B	Assign User	Reassign User	Sync to WC
Moti Mayor Test	18-Aug-2021 00:58:49	2020	View	Tax Return/FBAR	Resubmitted		Change Staff Status	Avishai - B	Assign User	Reassign User	Sync to WC
Don & Donna Test	19-Aug-2021 15:49:40	2020	View	Tax Return/FBAR	Resubmitted		Change Staff Status	Avishai - B	Assign User	Reassign User	Sync to WC
JANA YAALI TEST	16-Feb-2023 07:41:17	2017	View	Tax Return/FBAR	Resubmitted		Change Staff Status		Assign User	Reassign User	Sync to WC
JANA YAALI TEST	16-Sep-2022 11:02:05	2015	View	Tax Return/FBAR	Completed	Closed	Change Staff Status		Assign User	Reassign User	Sync to WC

Showing 17 of 17

To save time, the team interfaces with a program that converts their documents into PDF. This way, all documents are rolled up into one PDF document, making it easy for the team to work with just one document. The whole process of converting uploaded files into a PDF is done using a tool called ConvertAPI, which is integrated with Creator.

Benefits and ROI

Zoho Creator has transformed our business. We're no longer busy with labor-intensive manual processing—we're now able to focus our energies on growing the business and increasing customer satisfaction by providing faster turnaround time. This has given us an edge over our competition.



- David Beychok, CEO

In the last three years, NurkinCPA has doubled their business in terms of revenue and customers. They estimate that their processes are about 95% automated for customers, from pricing to submitting their tax return. Productivity has increased by 200%, and they have been able to achieve this by reducing time-consuming tasks, such as printing and physically locating documents. And their sales are up by 40%!



200%
increase in
productivity



95%
automated
customer processes



40%
growth in sales

However, the most impactful benefit, according to Beychok, has been telecommuting. Luckily, they had implemented this before the pandemic hit, so when it did, everyone was able to transition to working from home seamlessly. This saved the business during the pandemic and continues to allow employees to work remotely.

“

Creator enables users to easily develop and deploy custom systems for any purpose they require, with the support of excellent teams and partners. You have a whole support system behind you, and there are endless choices of who you feel comfortable working with. You're not limited to working with only one select developer partner, which gives you flexibility. Additionally, if you have the time, you can even do it yourself!



- David Beychok, CEO

”



Looking forward



NurkinCPA plans to deal with the 5% of their process that isn't automated, as well as transitioning more of their customers (around 2,000) to the NurkinCPA self-service portal. As they're still growing, they also foresee changes and enhancements to their existing system. That was one of the reasons why they chose Creator, in fact—because it's capable of scaling to meet future growth.

About us

At Zoho Creator, we've always worked towards a single purpose—empowering users to build functional apps with minimal coding expertise. We've helped **14,000+** brands create bespoke solutions and improve their end-to-end operations across a variety of industries. With over **16 years of experience** in catering to **B2B and B2C organizations**, we have the best tools in the trade to help you improve your business.

You can get started with Creator by visiting our [signup page](#). You can also check out our [prebuilt apps](#) to get started right away.





Creator

We'd love to talk! Reach out to us

hello@zohocreator.com



zohocreatorofficial



showcase/zohocreator



zohocreator



zohocreator