



# magazine

COVER STORY



## ReceiptBank™

*Let Receipt Bank Do It,  
So You Don't Have To*



INTERVIEW

**Steve Vamos**  
*Xero's new CEO*

*Plus lots more from Xero connected Apps*



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# PKF Asia catches the Xero Bug



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**D**orian Crighton from Christchurch and Chris Lamb from Palmerston North recently attended the June PKF Asia Pacific Conference which took place in Ho Chi Minh City, Vietnam.

With 105 attendees from 19 countries this was a real eye opener to the rapid pace of change across Asia and the Pacific.

A stand out at the conference was a presentation from Xero which really caught the imagination of those attending. Xero have now opened an office in Hong Kong as well as Singapore and have 30 staff between these two Asia offices significantly beefing up their presence in the region.

What was fascinating was to see the

interest of the Asian delegates go to another level as they watched how Xero was transforming how their clients could do business in Asia. The hands-on Xero demonstration was presented by one of their local staff from Hong Kong and grabbed the attention of the audience going through the power of Xero and its ability, for instance, to auto code transactions using AI.

This was such a good example of technology rapidly going global and an outcome from that has been a monthly "Xero Zone" webinar run by PKF International. The goal of this webinar is to share the knowledge built up from the early adopters of Xero in New Zealand and help PKF Asia firms build a solid and growing Xero skill set and business offering.

As far as the rest of the conference went, China is, of course, hugely significant and PKF has a broad representation in China. We learnt a lot from the PKF China desk about how clients who are looking to invest into China ventures can get help with establishment of companies, taxation advice and practical support on the ground.

Of course, no visit to Vietnam would be complete without some site seeing so we spent the last day visiting the Cu Chi tunnels which were quite amazing. They even had a shooting range where you could try your hand at an AK47 rifle or M60 machine gun – who said accounting conferences were boring?



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# Proposed Ring-Fencing of Residential Property Losses



**A**ny day now, Inland Revenue is expected to finalise their views on a proposal which will limit the ability of a property investor to offset losses from their residential property portfolio against their other income (for example salary and wages) to reduce their income tax liability.

In what is another targeted policy measure, the Government expects the introduction of loss ring-fencing rules to help level the playing field between property speculators/investors and home buyers.

The Government considers that investors (particularly those who are highly-g geared) who are able to claim a tax deduction for mortgage interest often leading to a refund of PAYE paid, helps them to outbid owner-occupiers for properties as they are not allowed to claim the same deduction.

The proposal is that loss ring-fencing will only apply to "residential land" as currently defined for the bright-line test and would not apply to a person's main home or land that is already subject to tax on sale. The proposal is for the rules to apply on a portfolio basis so investors would still be able to offset losses from one rental property against profits from another property.

Currently (see example in the table

below), this investor would be able to claim an overall rental loss of \$3,000 in their tax return. Under the ring-fencing proposals, they would instead declare nil income in their tax return and carry forward the loss of \$3,000 to offset against future rental or property income.

Inland Revenue has also thought ahead to consider the avoidance rules that will be required to prevent structuring around the proposed ring-fence. For example, investors circumventing the rules by borrowing funds to acquire

shares in a company, or to fund a trust or other entity, that acquires residential investment properties. The proposed commencement date for the ring-fencing rule is the start date of the 2019-20 income year (1 April 2019 for most taxpayers). The impact of the ring-fencing rule is definitely something to keep in mind if you own or are considering investing in residential rental properties.

For further information or advice, please contact Jono Bredin at jono@pkfbmr.nz or call +64 3 951 3162.

	Property 1	Property 2
Rent received	20,000	15,000
Expenses paid	12,000	7,000
Interest paid	12,000	7,000
Profit (Loss)	(4,000)	1,000

# Xero Gems



Chelsea Connell, Xero Consultant, PKF Hamilton - Hamilton  
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## Top tips to make your life in Xero a breeze

My name is Chelsea Connell, a Chartered Accountant and Xero Enthusiast at PKF Hamilton. I have been working with Xero in public practice accounting firms for 6 years. I love working out at my local F45 Gym and don't mind a few cheeky wines on a Friday – it's all about the balance. Connect with Chelsea on linkedin.

Are you currently using Xero but feel like you aren't maximising all of the features available to you? Here are my top tips for efficiently managing your paperwork.

**1. Every Xero file has a unique email address linked to Purchases.** Save this email address as a contact in your

emails. When you receive bills from suppliers via email, simply forward them to your "Xero Bills" address and they will arrive as a draft Purchase in Xero. Once you have completed entering the invoice details in Xero, you can save the bill and attached will be a PDF copy of the original bill. No need to print off any hard copies – your invoice is now electronically stored within Xero!

**2. Download the Xero app.** When you are making purchases on your credit card or business card, simply take a photo of the receipt via the app, enter the supplier details and throw away the paperwork. Bank reconciliation becomes a breeze because Xero will match the bank transaction line with the receipt for you. All

you need to do is click "Ok".

**3. Are your customers or suppliers using Xero too?** Share your Xero Network Key with one another. This will allow invoices to flow between you and your customer/suppliers Xero files directly. The invoices will show up as a draft for you to approve. No further work required...except making or collecting payment!



# Making the most of Xero Apps



Kelly Nixon, Xero Implementations, PKF Rutherford - Palmerston North  
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**P**ushing the boundaries is something I like to do, and we found that with a group of Apps that link to Xero we could automate the administration for our clients and support them remotely without sacrificing efficiency. How do we do that you might ask?

Well most administration systems include Debtors and Debt Collection, Creditors and Payments, Payroll, General Ledger Cashbook and Reporting plus sometimes Inventory. That meant quite a bit of learning to get up to speed with the Apps that drive each area.

When we looked at Debtors the ideal situation was where our clients used an App like **Workflow Max** to monitor their work and generate Invoices that could then be exported straight to Xero. That way the client drives what goes into the invoice and we just pick up what goes into Xero debtors.

When it came time for Debt Collection I used **Debtor Daddy**

to generate follow up emails that have a humorous edge to them. We found this was effective in bringing down debtor days, highlighting issues to be resolved and making sure follow up happened.

On the Creditors side once again we used **Receipt Bank** incorporating everything we had learnt internally including getting the client's suppliers to email invoices direct to Receipt Bank. What was so effective was that at any stage in the approval or payment process the client could open a copy of the invoice to check.

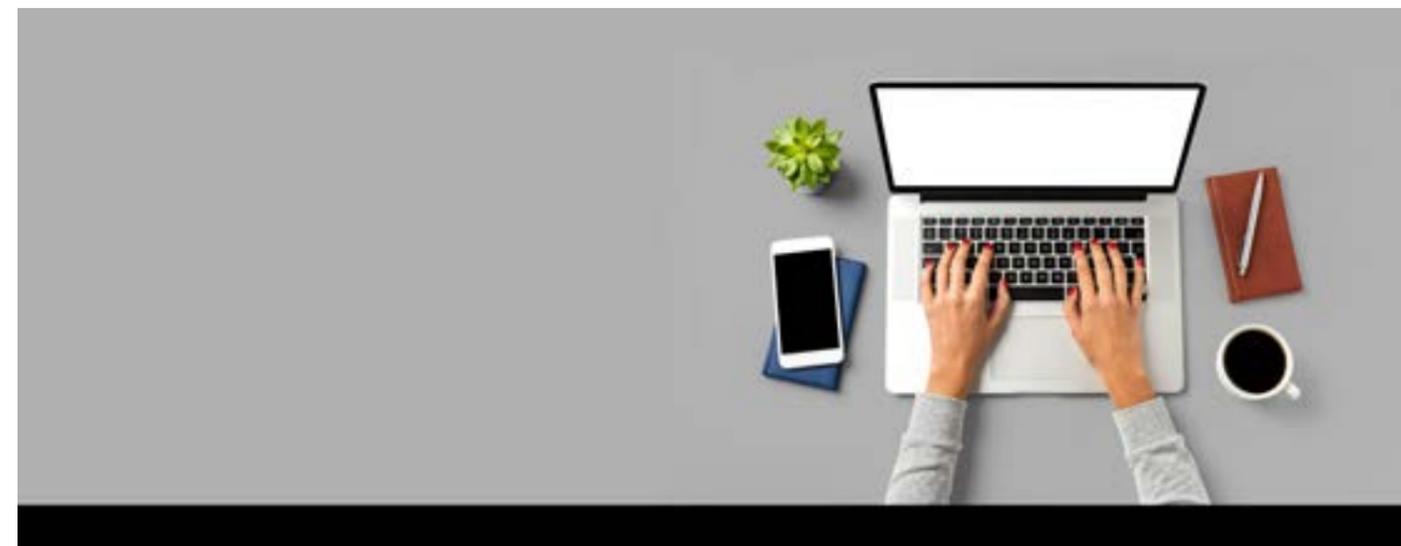
For payroll we used a local provider, **Smart Payroll** who have the advantage that they handle all the payroll filing with the tax department. Not that I get involved in payroll as one of my colleagues is the expert in that as you can't do everything.

At the heart of everything is the **Xero General Ledger** and I like to keep my reconciliations right up to date so that any Debtor or Creditor

issues are solved quickly. I would work closely with our Accounting team and pick up on coding feedback so their regular reporting and GST work can go smoothly.

Where Inventory is involved we've used **Unleashed** and I again work alongside our Accounting team where their technical knowledge is required. That's the key really that we are wider team supporting what our clients require.

I like to think we take the headaches out of running a business so that our clients can focus on what they do best. If you would like to know more about how we can help, email me at kelly.nixon@pkfr.co.nz





# The powerful financial project management software that over 10,000 businesses love.

## Here's 5 reasons why:

- 1 Powerful financial analysis**  
with a suite of customised reports
- 2 Track time, costs and profitability**  
from quote through to job and invoice
- 3 Staff allocation feature**  
gives visibility on workflow, team productivity and capacity
- 4 Everything in one system**  
Manage business on-the-go, from anywhere
- 5 Xero owned and integrated**  
with robust customer support standards, and ongoing product development



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Asset Management Engineers

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# magazine

The independent magazine for Xero users, by Xero users

## Issue 16

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**SAVE!**  
on Xero-connected App subscription fees

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UPDATED FOR **2018!**

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NOW OVER **700** APPS

# Microkeeper in the marketplace

The latest addition to the Xero marketplace, Microkeeper is Australia's all-in-one software solution to Rosters, Timesheets and Payroll. Joel Davis, Co-Founder and Software Developer at Microkeeper talks about creating Australia's first integrated Rosters, Timesheets and Payroll, joining the Xero marketplace and why software solutions are the key to business growth...

**When presented with a problem, business instincts kick in and we start thinking of solutions.**

Accounting issues? Talk to an accountant.  
Sales issue? Talk to a marketing firm.  
Workload overflow? Hire more staff.

However, in the modern world of business our human instincts can sometimes let us down. Too often we try to apply a quick band-aid fix, rather than taking a step back to consider long-term, scalable solutions.

Business weak spots are often amplified when undergoing expansion. Whether it's multiple worksites, extended hours or additional employees.

How these growing pains are dealt with can be the difference between a short-lived boom and setting up a long-term platform for success.

How do we hire over 1000 employees?

How do we deal with invoices coming in from 140 different sites, where over 300 expenses a day need to be claimed?

How do 1500 staff clock on every day and how do we turn that timesheet data into payslips?

In a different era this kind of growth would have been almost impossible, but the answer to all these problems can be summarised in one word... **software!**

Like most modern software apps, Microkeeper was developed after witnessing the frustration of repetitive manual business administration tasks. We saw rosters being created in Excel or on whiteboards and payroll officers driving around to multiple worksites to collect timesheet data.

We could see the impact a digital solution could have for these businesses. After some research, we couldn't find a system that incorporated more than one component (rosters, timesheets or payroll) tailored to the Australian workforce. As these processes are all linked, it made sense to us to have a system that could move through each stage of the wage process.

Recently, our integration with Xero has brought about even more functionality, allowing payroll data to be exported directly into Xero.

This level of automation results in an increased ability to manage more demanding work environments, allowing for easier scalability. We've seen businesses grow from 100-1400 staff in a relatively short period of time.



@Microkeeper

Joel Davis, Co-Founder / Software Developer, **Microkeeper**

Self-confessed nerd, Joel has a passion for utilising technology to create efficient processes. Whether it's stacking the dishwasher or creating Australia's first comprehensive online payroll solution, Joel looks for the most streamlined way of doing things, and won't stop until he finds it. As lead Software Engineer at Microkeeper, he spends his days coding, creating a seamless user experience and, of course, pondering ways to save time.

One of our newest users successfully utilised multiple software solutions, in order to ensure its rapid expansion could be achieved as efficiently and pain-free as possible.

Xero was being used prior and could handle the workload as it grew.

Microkeeper was implemented, allowing staff to clock their work hours and assign it to jobs. And HR software made hiring and onboarding staff to Microkeeper seamless.

Adopting a range of complimentary software solutions prior to their growth made sure they were ready for the changes that came their way. They could then focus on getting their job done without getting bogged down in the paperwork.

There are many different aspects to consider when growing a business, but software should be the first consideration.

Software is not one-size-fits-all. To experience multiple benefits, choose solutions that integrate easily to your existing processes and that are complementary to each other.

Time spent at the start to consider your unique business needs will save time tenfold in the future.

## Transforming the World of Accounting

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# Let Receipt Bank do it, so you don't have to

## Finding the time to add value

Data is the lifeblood of accounting. From compliance to advisory, it forms the raw material for accountants and bookkeepers all over the world.

But, if the ultimate goal is to use a business' financial information to provide utility of some kind, professionals have been spending the lion's share of their time just getting hold of the information they need to get started.

Now though, the balance is shifting. Instead of spending your time gathering paperwork, entering data and combing through bank feeds just to get to that final reconciliation, you can flip the process. The journey to reconciliation can now be almost instant, leaving you free to use your time as you choose...

### The Connected World

The main reason businesses lose time on data gathering is paper. And even in the Xero cloud age, physical records are still slowing down the process. In fact, much of the traditional bookkeeping process is just moving information around.

First, clients need to get their receipts and invoices to their accountant or bookkeeper. This usually involves the dreaded shoebox of paperwork, or it might have progressed to an email of scanned PDFs.

Either way, someone then has to spend hours typing all the data into a spreadsheet or into Xero. It's slow, it's boring and it's really easy for errors to creep in. Then it's time to comb through the bank feed to work out which items are paid and unpaid.

The advance of digital commerce has changed all of this, especially with the increasing ubiquity of open APIs. More and more transactions take place entirely online.

For example, when your client pays a utility bill by direct debit, your energy supplier generates an electronic invoice. It's possible for that invoice to be picked up, the data recognised and transferred to their books, along with proof of payment, without any effort from you.

In this case, all that's left for you to do is click 'Reconcile' in Xero. The next step is up to you. But how do you build an automated process that's also fully reliable?

#### End-to-End Automation

With such a convoluted process, it's no surprise that there have been many partial automation

solutions. Each of these offers an incremental increase in efficiency. One of the simplest ways is also the most seldom used - simple email forwarding.

Every email provider, from Office to Gmail, offers the ability to forward emails based on sender. With one simple change, your clients would never have to remember to forward a supplier invoice to you, or lose their audit trail in a busy inbox.

So why doesn't every small business just set their suppliers' email addresses to automatically forward to their accountant or bookkeeper? The truth is that, in isolation, most partial automation systems deliver too little value to make this worthwhile.

After all, when every document still needs two minutes to be transcribed into Xero, what is the incentive to save two seconds?



@ReceiptBank

**Damien Greathead** is the Vice President of Business Development for North America at **Receipt Bank**. He's responsible for building Receipt Bank's accounting channel in the United States and Canada. Damien works with accounting firms of all sizes who want to leverage cloud technology to grow their firm. Prior to Receipt Bank, Damien was a Director at 2020 Group USA, which was acquired by Panalix in 2016. Damien speaks to state and national accounting associations around the world on topics including change management, marketing and technology.



The real power comes when the process is connected – a series of events where each enables further efficiencies. We are now at a place where this is possible.

Electronic document capture enables automatic data recognition, which can then be matched to a bank feed for certainty, and reconciled instantly and safely.

So how does this work in Receipt Bank?

#### Data is Mobile

One of the biggest early advances in real-time accounting was

implementing mobile technology. Suddenly, everyone had the ability to view the same information instantly, wherever they were.

The main problem was that the information they were looking at was seldom 'real time'. Due to traditional processes of delivering records once a quarter, or even once a year, the data was often months out of date.

Mobile apps that captured receipts changed all this. Suddenly documents could be shared the moment they were received. The real-time dream was finally a reality. And since Apple and Google had

spent millions developing a phone that everyone could use, even the most technophobic clients could be brought on board.

Having pioneered app-based receipt capture early on, Receipt Bank also expanded mobile interactions to include Whatsapp-style messaging to clarify receipts and invoices, as well as automated submission reminders to prompt clients to send in their documents.

Accounting is now moving from a mobile-capture system, where receipts can be snapped on the go once physically received, to an API-based system where documents

**2000+ Suppliers  
Now Integrate Directly  
With Receipt Bank to  
Sync Invoices**

are captured as soon as they are generated.

Receipt Bank's Invoice Fetch links directly to over 2000 suppliers that deliver their monthly invoices via an online portal. This means our system can pick up the invoice automatically, import it into the client's account and extract the data straight away.

There's no work for the client, the bookkeeper, or the accountant, just instant collection.

**Going Beyond OCR**

OCR stands for Optical Character Recognition, and it's been around in various forms since the early 20th century. OCR software is designed to analyse images of printed text and turn it into data that a computer can process more easily – or put into a spreadsheet/general ledger.

Applying it to receipts and invoices has always been a challenge as there is no set format for transaction records. That makes it hard to set rules for how a machine should approach reading a

document.

This changed with the advent of AI and machine learning.

Receipt Bank was an early adopter of applying these new technologies in the accounting space. There was a common refrain that machines could never know clients as well as their accountants. And we agreed.

That's why Receipt Bank's extraction module learns from accountants and bookkeepers. In fact, every single user has a dedicated machine learning map that learns from their preferences and expertise.

That means every time you edit and review the data extracted by our system, for example, correcting a supplier, the algorithm learns and applies the rule to similar items.

We now process over 4,000,000 receipts and invoices every month, with the highest accuracy of any cloud app. Processing times have decreased by 80% in the last year alone.

The end result is automation that

accountants and bookkeepers can trust, as it learns from you just like a member of your team.

**Matchmaking**

The introduction of bank feeds was a huge step for Xero users. Everyone could now save huge amounts of time on reconciliation by matching transactions directly to a bank feed.

We have the ability both to use it as the final check in the system, and to pull the data earlier in the process as a source of truth. Not only is this essential to check the accuracy of extracted data, but it also helps answer the age old time drain of working out whether an item has been paid or not.

So, if your client sends in a receipt which matches a line in their bank feed in Xero, we let you know. We even put the bank data right next to the extracted data, so you can check it's all correct.

Using Xero's API, Receipt Bank can publish to a variety of locations in the ledger. Since users are notified instantly if an item is already in

the bank feed, it can be published straight to Paid Items and reconciled straight away. It's all part of building control and certainty into every step of the bookkeeping process.

**The Bookkeeping Switch**

Once, bank reconciliation was the final result of a long, arduous process – the sigh of relief that signalled a safely balanced transaction.

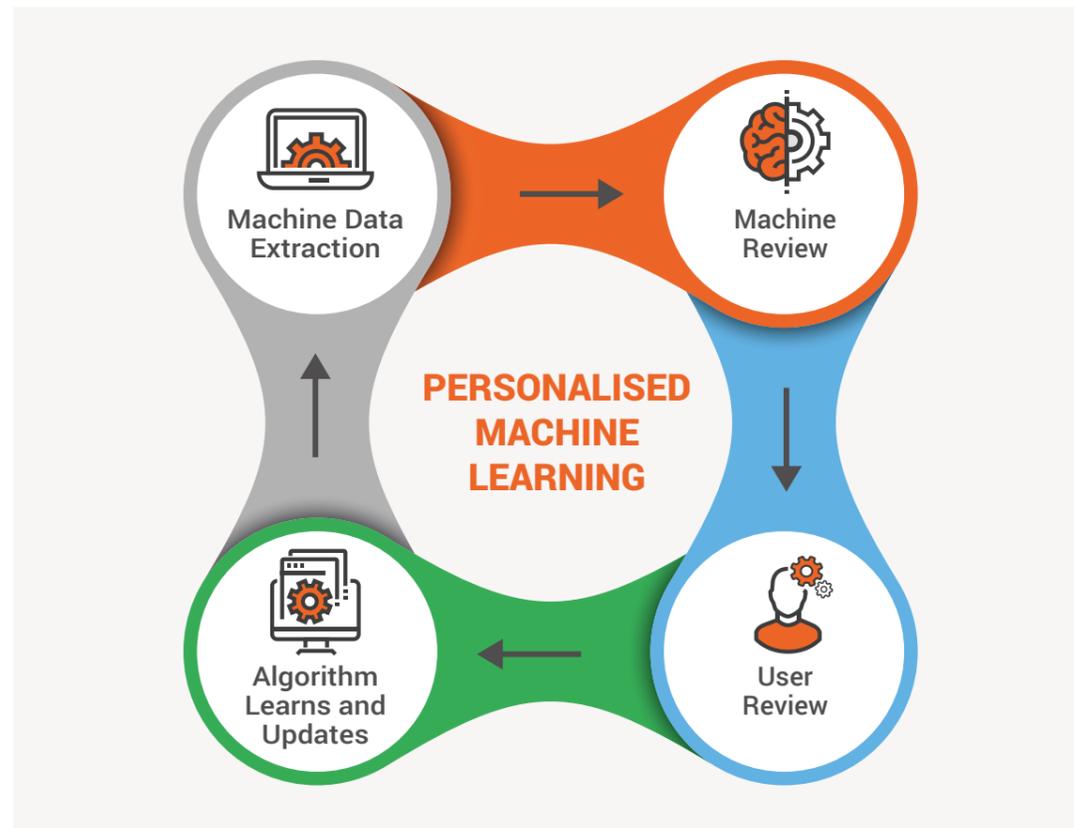
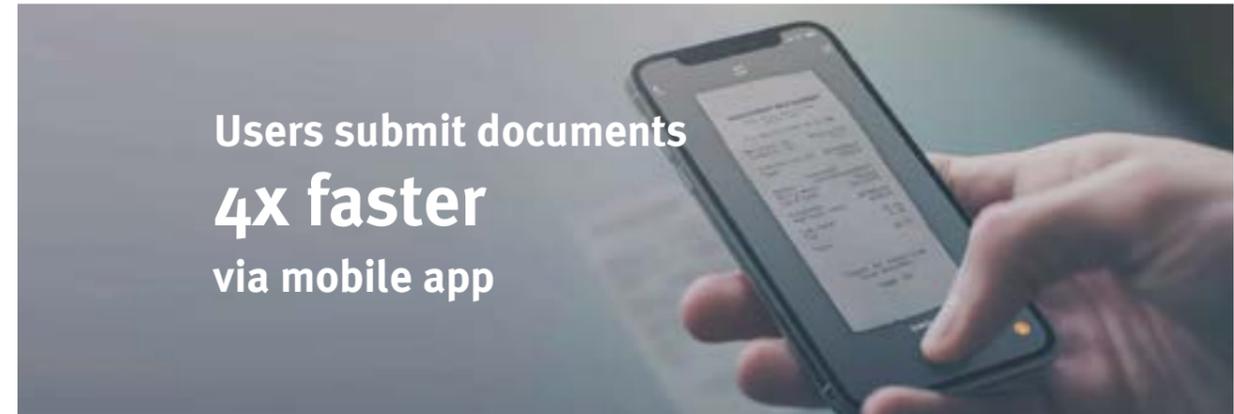
Now, however, reconciliation has become the first step on a journey of adding value. With one click, accountants and bookkeepers have a solid foundation for advice, forecasting or even just growing the size of their practice.

We've seen sole practitioners handling over 200 clients on their own, thanks to the effective implementation of automation tools like Receipt Bank.

Now is the time to make the bookkeeping switch - stop spending your time just getting the data and start using it to make a difference. Receipt Bank puts you into control of the process. What you do with the time you save is up to you.

**FIND OUT MORE...**

Visit Receipt Bank at [www.receiptbank.com](http://www.receiptbank.com)

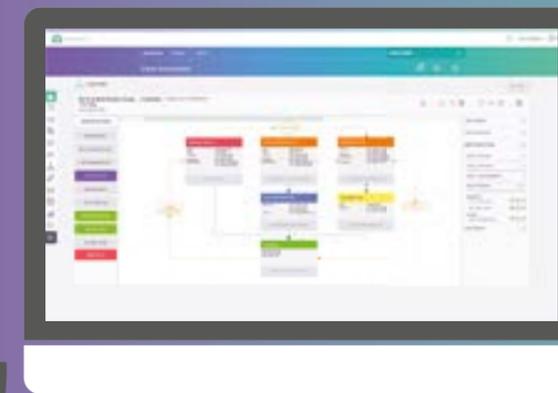


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# Q&A

## Steve Vamos

CEO, Xero

**XU:** It is amazing to be joined by the new CEO of Xero, Steve Vamos. I'm sure you have been asked this so many times now, but how does it feel to be the CEO of such an amazing company?

**SV:** It's fantastic to be at Xero. What Xero has achieved over the past 10 years, and the community of customers and partners that we have around the world is remarkable and very special. The opportunities ahead for Xero are huge when you consider that less than a quarter of small businesses around the world are in the cloud.

**XU:** Before we talk through all things Xero, it would be great to know how your journey so far has led you to this point?

**SV:** My career in the tech industry started at IBM working across various sales, marketing and general management positions for 14 years, before leaving to join Apple as managing director Australia and New Zealand & Asia Pacific.

My time at Apple overlapped with the return of Steve Jobs as interim CEO. It was during this period that I learnt the importance of the focus and the tough choices he made to turn Apple around.

I left Apple to become CEO of ninemsn, an online media industry startup that was burning about \$3 million cash a month, with little to show for it, in a market for digital advertising which was completely new. When I left 4 years later in 2002, the company had the largest audience of any online advertising media business in Australia and was growing revenue rapidly.

I then joined Microsoft as managing director for Australia and New Zealand, where I worked with my team to increase our growth from low single to double digit growth rates.

Over the past decade, I've continued to be heavily involved in the tech sector as a Board director; coaching and mentoring

tech-leaders to cultivate effective leadership and management practices.

I had been working with Rod and the Xero leadership team for 18 months on the businesses global operating model before stepping into the CEO role.

**XU:** You are still fairly new to the job, what do you feel you can personally bring to your newly appointed role?

**SV:** My experience leading and working in organisations that are changing fast. I have been involved in the technology field for the past 30 years and have seen a number of large shifts. I've seen these changes take place at tech start-ups and large multinational corporations.

Today the world is changing more than ever. Managing and navigating change effectively is a core competency that leaders in business must have. An open mindset is also vital. This is an area I am passionate about.

At Xero, I'm working closely with the leadership team to navigate change, as we continue to grow and drive adoption of new platforms for small business and our partners.

**XU:** Have you set yourself any personal goals to achieve whilst in the role of CEO?

**SV:** I'd love to see every small business in the world benefit from cloud accounting and I want to see Xero become the best international technology company it can be.

**XU:** Who has been your biggest inspiration to help lead you to this point in your career?

**SV:** Definitely in my earlier years, my Dad, who I followed to IBM at the beginning of my career. Having him as a mentor helped me enormously in my career. There have been many great people I have worked with over the years who have taught me a lot and



supported me in my career - too many to mention here.

**XU:** With you taking over as CEO at Xero it feels like the start of a new era. What vision/direction do you have to take Xero forward?

**SV:** Our founder, Rod Drury, had great vision and we remain committed to the purpose and mission that sits behind that. This includes bringing the benefits of cloud accounting to as many small businesses as we can around the world. Also, helping small business grow by better connecting them to those they do business with and making everything they do easier to do with Xero. Working closely with and enabling accountants and bookkeepers to be the supporters and coaches of small businesses is a big part of that.

**XU:** What are the positives and negatives that can arise from a large company, such as Xero, changing their CEO?

**SV:** I have great respect for Rod and all he has achieved with Xero. There is continuity in the work we have done together over the past 2 years, which has made transitioning to our new roles (me as CEO and Rod as a non-executive director) very smooth and much easier than people might have expected.



**XU:** Xero has had an amazing year of growth worldwide. How exciting was this to be apart of and how was it achieved?

**SV:** It is great to be apart of Xero and to have observed what has been achieved. We now have 1.4 million subscribers around the world in 180 countries. We have a lot more to do and we will constantly look for opportunities to do everything that we do better going forward.

**XU:** It was great to meet you at Xerocon Atlanta, how did you find the event?

**SV:** It was great. I love Xerocon and the energy we see in our partners for helping small business. Xerocon is all about what makes Xero special - celebrating the bond we share with partners and growing our relationships.

**XU:** Xero seem to be more specific with the ecosystem app partners that you



now integrate with. What is the future vision for the ecosystem?

**SV:** The ecosystem is going to become more and more important to us over time if we are to realise the opportunity of Xero as a platform for small business. We need our app partners to provide a broader range of services that build on our core accounting engine to make that a reality.

**XU:** Is there any exciting news or new developments our readers can expect to see from Xero in the next 12 months?

**SV:** Every aspect of our business is constantly

changing but the principles that guide us won't. We are committed to our people and partners. We are committed to our vision, mission and purpose. These won't change. The way we operate will continue to change - it must so we keep on doing beautiful business with our customers and partners.

**XU:** When you're not busy with Xero what can we find you doing?

**SV:** I love travel (lucky for that, given what my job demands), reading (author Robert Harris is my favourite), watching sport on TV (especially American Football and my team, the New York Jets), exercising (I love walking), and spending time with my family.



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# Has cloud become king?

## 5 key findings from the Accounting Benchmarking Survey 2018

Is cloud accounting delivering on its promise? Josh Sasto from GoCardless reveals some of the key findings from their recent Accountant Benchmarking Survey 2018 – and explains how there's still work to do when it comes to getting the most from the Xero ecosystem...



@GoCardless

Josh Sasto is Head of Partnerships at GoCardless, the UK's leading Direct Debit solution.

GoCardless integrates with Xero to bring small businesses and their accountants a fast, hassle-free way to automate customers' payments and improve cash flow.

**F**or most Xero practices, the cloud journey is well underway, but has the digital approach to accounting and business advice achieved its full potential in the UK yet? In short, has cloud become King within the UK accounting industry?

This Spring, we surveyed 297 UK accounting firms to gauge the impact of accounting technology on practices today. Here are 5 of our findings.

### 1. Xero is the UK's accountant's first-choice platform

**67%** of firms recommend Xero. Xero was the platform of choice among the firms that took part in the survey, with over 67% of respondents recommending Xero to their clients, and 45% using Xero themselves.

That's good news for the future expansion of Xero, especially given Xero's recent rebrand to the 'Beautiful business' strapline and the company's increased focus on becoming a full-service business platform and ecosystem, rather than just an accounting software application.

### 2. Cloud helps you grow and drive profits

**23%** place increased use of tech as a top priority.

The no. 1 priority for accountants in our survey is acquiring more clients, with 41% making it their top priority. That focus on client acquisition is nothing new, but what's interesting is how technology is increasingly helping firms to win these clients.

23% of firms see increased use of automation and technology as a top priority.

With an increased focus on technology:

- Firms are seen as tech-savvy and app specialists in the marketplace
- Businesses benefit from the efficiencies of automation
- Staff spend less time keying in, and more time with clients
- Firms can offer deeper insights and value-add services
- Client:Bookkeeper ratios are boosted, increasing practice efficiency
- Fees are lower due to increased client numbers and economies of scale

Scaling-up your accounting firm is only possible with these technological foundations in place,

as Xero Head of Accounting and The Wow Company founder, Paul Bulpitt, recently noted: "It's a no-brainer to have Xero for the accounts and apps like GoCardless and Receipt Bank providing a platform that we can operate from as a business. The time and efficiency savings of having something like GoCardless to collect our fees automatically is insane – we'd probably have grown more quickly and earlier if we'd had Xero and Receipt Bank etc. in place sooner."

### 3. Client adoption still needs improvement

**53%** of the average firm's client base use cloud accounting. According to our survey, on average, 53% of a firm's client base is using cloud accounting. And of that 53%, only slightly more than half (57%) are using the firm's preferred software.

Having half your clients still unconvinced of the cloud approach may sound surprising in 2018. But it's less surprising when you factor in that 85% of firms don't make it mandatory for clients to use their preferred software – whether it's a single platform or multiple software options.

So how can firms do more to boost

### FIND OUT MORE...

To view the full GoCardless Accountants Benchmarking 2018 Report, visit: [gocardless.com/guides/reports/accounting](https://gocardless.com/guides/reports/accounting)

client adoption of cloud?

At base level, there are 3 key things to get right:

1. Communicate the benefits of the Xero ecosystem
2. Make it easy to switch to cloud
3. Provide onboarding and ongoing education

That's a methodology that works for Xero partner, Wilkins Kennedy, as Simon Woodhams, Head of Cloud Accounting Software, explained in our recent panel discussion at the UK Accountex event.

"If we're onboarding, we'll always tell you about what software we're going to provide for you. Then in 2 or 3 weeks' time there will be a free training session. We give clients the software, we follow it up and we do regular updates. That continuous learning is more the way forward now, rather than just getting certified."

### 4. Staff need more cloud training

**40%** of firms don't provide compulsory internal cloud training. An impressive 73% of our survey respondents said they had adopted cloud accounting well or very well. But of the firms we spoke to, only 40% provide compulsory cloud accounting training for their accountants, and 32% don't provide any at all.

Having the right technology sets the foundations for a scalable cloud practice, but it's your people that

are the defining factor in making the strategy succeed – and that means providing the best possible training, education and support for your team.

With online training like Xero U available, it's easier than ever to train your team, as Sharon Pocock of Kinder Pocock mentioned at our Accountex panel session:

"Our staff tend to have done their Xero certification before they join and then we do regular monthly updates. Most of the software providers we use have really good help centres with quick 2 or 3-minute videos – so you can train up as you need to."

### 5. Cloud payments unlock time and cash

**42%** of the average firm's clients pay by Direct Debit. Our survey found that 42% of the average firm's clients pay their fees using Direct Debit – and more importantly, that there is a clear correlation between Direct Debit usage and a firm's average debtor days, as well as the time they spend chasing payments.

The higher the % of client fees taken through Direct Debit, the lower a firm's average debtor days are likely to be and the less time they tend to spend chasing payments.

It's one of the reasons that many firms choose Direct Debit to

collect their own fees – and advise their clients to do the same. This data also shows that uptake matters: firms who move a greater percentage of their payments to Direct Debit are really feeling the benefits.

Having an automated cash collection process really does unlock both time and cash, as Ben Nacca of Cone Accounting explained to us recently:

"Most accountancy firms have a debtor list with a lot of money on the table; with Direct Debit we're never owed any money, which is really good for business. The set-up process for GoCardless is pain-free – and once everything is set up, cash collection takes care of itself"

### What's next for the cloud?

So, is cloud king? Based on the findings of our benchmarking survey, UK accountants are embracing the online approach and using it to deliver a more efficient, attractive and profitable kind of accounting firm. But there's still work to do.

Staff need better ongoing training, more clients need to switch to cloud and firms need to increase their use of automation to help them achieve the full potential of the cloud. We'll be running the Accountant Benchmarking Survey every year, so we're looking forward to seeing how cloud progresses over the next 12 months.



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# Q&A

## Accounttech.Live

Laura Venables

Event Director, Accounting Business Expo / Accounttech.Live

**XU:** It's wonderful to be joined by Laura Venables, Event Director at Accounting Business Expo and now Accounttech.Live. Congratulations on your announcement of Accounttech.Live! To start, can you tell us how this all came about?

**LV:** Accounttech.Live is the next evolution of the Accountant's Technology Showcase Australia (ATSA), a conference we acquired last year. Now, under new ownership and a new brand we go into our 12th edition, re-energised and completely reimaged into a forward-thinking exhibition & fun learning experience. Accounttech.Live brings today's innovations to life, designed exclusively for accountants, bookkeepers & advisors in practice who are in search of smart solutions to improve their firm and help their clients succeed.

**XU:** The first edition of Accounttech.Live will be in November 2018. What can we expect to see and experience?

**LV:** As a pure-play technology event, Accounttech.Live will showcase what's new and next in the fast changing ecosystem of cloud accounting, finance and business management technologies.

With a totally new look and feel, you can expect to see an array of non-stop, tech demos and innovations-in-action, peer-to-peer led discussions, education and awesome networking opportunities. It's no secret that Australia & New Zealand are countries that have pioneered and adopted many of the world's smartest solutions, so a day or two at Accounttech.Live will give you access to some of the best ideas in the world.

**XU:** You now hold two events - Accounting Business Expo and Accounttech.Live. How do these events compare?

**LV:** Accounting Business Expo, Sydney, is our flagship, national exhibition &

conference designed for every discipline of the accountancy profession. It covers a wide range of business & technology solutions, services and education at a broad level. Accounttech.Live, Melbourne, is a technology-led exhibition & conference that covers the rapid evolution of cloud accounting and the ecosystem driving digital transformation of accounting firms & their SMB clients. It's all about digital!

**XU:** Accounttech.Live will be held in Melbourne, exciting times! What led you to host the event here and what benefits will Melbourne offer?

**LV:** Following the success of Accounting Business Expo in Sydney, we were continually being asked to run an event in Melbourne, which is a city widely recognised as a 'technology hub'. Melbourne is often referred to as 'Tech City' after it was crowned tech capital of Australia, so naturally it made sense for Melbourne to host Accounttech.Live. Melbourne is so unequivocally on-trend and one of the coolest places to visit in my opinion, so book your trip early and extend your stay - you won't regret it! Fun fact: Melbourne has been voted the 'most liveable city in the world' for the past 7 years!

**XU:** In May, you rebranded from Accountants' Technology Showcase Australia (ATSA) to Accounttech.Live. What are the most significant changes you've made?

**LV:** First of all, we've removed the price tag to attend - accountants & bookkeepers can now visit for free offering a far more flexible, time and cost-efficient experience. The landscape of technology continues to grow and evolve and, with an influx of new software solutions entering the market, the landscape is huge. So, we've made the exhibition bigger to better reflect this. We've also made it much easier and convenient for international companies to exhibit with us.

**XU:** What led your team to rebrand?

**LV:** Accounttech.Live is designed with the sole purpose of helping accountants & bookkeepers prepare, and benefit from this unique time in history. The new brand reflects our vision for a tech focused, vendor-neutral and forward-thinking event.

**XU:** Before you took over Accounttech.Live it was a paid event. Do you anticipate any challenges having made the event free?

**LV:** We've made the event free to attend to offer visitors way more flexibility and more opportunities for time-poor business owners and their teams get out, get face time and experience what's happening in the industry. Whether that's for two hours or two whole days, the power to create your own agenda sits with the visitor not the event organiser!

**XU:** A main focus of Accounttech.Live is to give delegates as much time on the expo floor. How important is this for both delegates and exhibitors?

**LV:** The event is designed in a way that is conducive to doing business. Unlike a traditional conference where delegates are essentially 'forced' to network with exhibitors during tea and coffee breaks - an environment that can be awkward and unnatural for many - the format of Accounttech.Live is much more in tune with human behaviours. Exhibitors don't stand around twiddling thumbs waiting for breaks, and visitors are not dictated to via a set agenda. This makes way for more meaningful conversations, so everyone wins.

**XU:** It's great to hear that Sholto Macpherson will be looking after the education for Accounttech.Live. How important is this element to Accounttech.Live and how can attendees expect to benefit?





**LV:** Sholto is the world's leading cloud accounting technology expert, whose work in this space is respected by the most progressive accountants. Known for having his 'finger on the pulse' Sholto has studied the next generation of accountants in Australia, New Zealand, the US, UK, Canada and Brazil and is able to help define what the next-generation business model looks like and help accountants move to it. Sharp, cutting edge content is on the agenda, along with the success stories from other accountants that you can leverage.

**XU:** Following on from my previous question; how will the education differ at Accounttech.Live?

**LV:** Visitors can expect to see more 'tech-in-action' and more success stories from their peers. Packed with practical and tactical information, much of the education will tie back to many of the solutions you can see on the expo floor.

**XU:** The Accounting Business Expo team

has helped bring the technology change in the accounting industry to the forefront in Australia over the last few years. How do you feel this forward-thinking industry will develop over the next few years? How does Accounttech.Live fit in with this?

**LV:** Digital transformation has helped power growth in accounting firms globally and the industry continues to experience adoption of cloud technologies. However, today's marketplace has become complex and expansive, so for many accountants this has created an overwhelming sense of having to learn all of these solutions, let alone who to trust in serving their clients. This has also led to a state of inertia for many firms, in providing proactive business advice. Accounttech.Live will better help accountants define their firm's (and their client's) future technology strategy.

**XU:** What types of businesses should exhibit at Accounttech.Live?

**LV:** Any company in the world with solutions

that can help accountants & bookkeepers uncover exciting new opportunities and achieve their goals. For international companies wanting to showcase their solutions to the Australian market, there has never been a better time. All you need is your hand luggage, laptop and we take care of the rest. Oh, and don't forget your sunnies & SPF50+ because Melbourne is hot in November!

**XU:** It been great to talking all things Accounttech. Live with you. We are very excited about how this event will continue to impact the accountancy industry in Australia. Thanks for joining us!

#### FIND OUT MORE...

Accounttech.Live takes place on **13 & 14 November** Melbourne Australia.

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# How future-forward businesses manage the changing B2B landscape

## Meeting Growing Customer Demands in the B2B Landscape

According to Statista, B2B eCommerce sales are projected to surpass US\$1.2 trillion by 2021 in the United States alone. As businesses grow, they are increasingly assessing how to structure their offerings so they can meet growing customer demands, sell to a broad customer base, and take advantage of significant shifts in global commerce.

Changing buyer attitudes and expectations to be able to conduct commerce digitally has brought about a radical shift in the Business to Business (B2B) landscape. Businesses are manoeuvring to adopt the latest B2B technologies. By integrating the latest tech to their sales workflows, inventory management and accounting systems, they are in a powerful position to reap the rewards of these global trends.

What is clear to us is that clients have to be future-thinking businesses with a clear B2B strategy in place to capitalise on this profitable channel. As a key business advisor, your role is to educate and advise your clients on the best way to achieve this in order to meet their specific business needs.

## What Has Changed for B2B?

The B2B buying process has traditionally been largely manual. From beginning to end, buyers were funneled through predictable stages; sellers had to invest considerable time and effort to engage with potential buyers. Multiple phone calls were common, and paperwork would change hands many times between the

seller to the buyer until the sale has been completed. This manual process was open to errors and large handling costs, leading to a high cost-of-sale and an inefficient system.

As the B2B purchasing process migrates online, the process has become more efficient and seamless. This is further improved as eCommerce giants like Alibaba and Amazon move into the B2B space. They have helped make the B2B website experience similar to what buyers have come to expect with B2C purchases.

Those conducting B2B business sales are now dealing with a markedly different buyer than in the past. An increasing number of millennials are directly involved in B2B purchasing decisions. The result of this is that millennials are radically changing and shaping the B2B eCommerce landscape as we know it. As buyers, this digital native generation are used to easily purchasing online. As such, today's B2B buyers are less

tolerant of complicated purchasing processes, and instead look for intuitive and easily accessible and available purchasing mechanisms. Companies are increasingly forced to cater to these requirements in order to satisfy customer demands. Your clients' customers expect to be able to easily research for products, place orders, view negotiated special pricing, have flexible shipping options and more.

## Optimising the B2B Sales Process

These changing demands mean your clients need to be looking for new ways to exploit these opportunities by implementing B2B online ordering platforms.

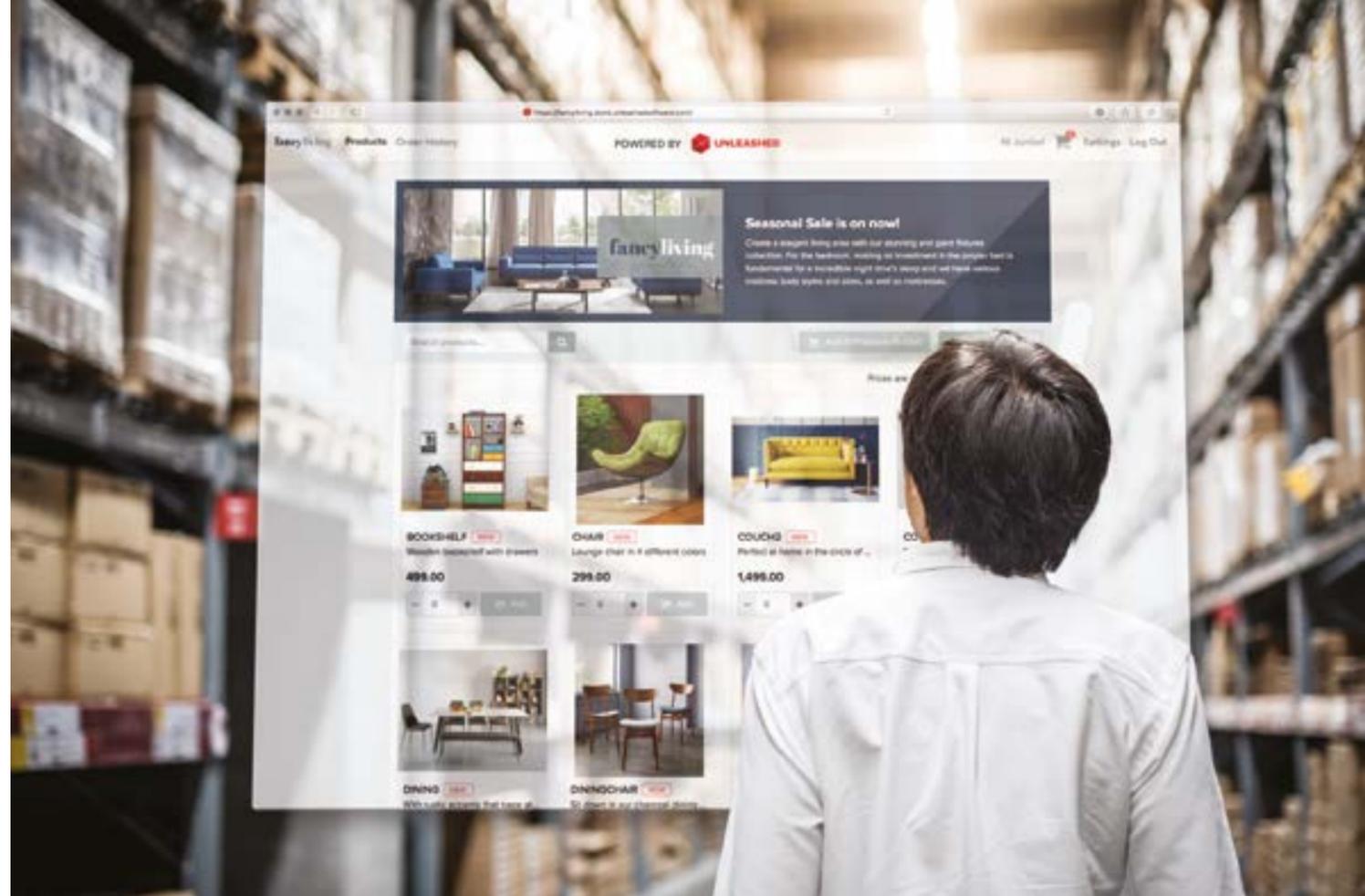
A B2B online ordering platform can boost your clients efficiency by reducing the manual processing of orders. It can meet buyers expectations through a user-friendly eCommerce experience where they can place their orders at the click of a button. An online platform removes the need for both parties to fill out numerous paper forms. It will allow customers to easily search for products, customised pricing and stock availability at their own convenience. This results in an accurate and frictionless sales transaction that flows directly through to your journals and requires less intensive selling on the part of your clients. Your clients' sales people can then focus their efforts on buyers with more complex orders, or on the sale and promotion of particular stock lines.

With the increasing demand to



@unleashedteam

Gareth Berry is the CEO of Unleashed Software, with more than 17 years of accounting and business experience. Under his direction, Unleashed has been in the Deloitte Technology Asia Pacific Fast 500 every year since 2013.



operate in real-time, B2B online platforms allow for easy visibility of product catalogues with clear stock availability. This accessibility dramatically improves your customer satisfaction, as customers can order anytime, from anywhere and from any device. Your clients are now able to provide an efficient sales channel that will allow them to serve their buyers around the clock, without the need for a dedicated sales person.

A B2B platform also allows your clients to lower their cost to serve. Instead of relying on multiple sales people and time-consuming paperwork, an online platform will allow them to eliminate manual

order entry, prevent costly inputting errors and reduce negative inventory. This flows directly through to your accounting systems and allows for accurate financial reporting. Digitising the process allows your clients and their staff to save both time and money.

## Adapting and Thriving

Rising competition and increasing popularity of online marketplaces, like Amazon, has meant that the traditional B2B sales model is rapidly evolving. There is an increasing demand for B2B sales transactions to be a seamless buying experience, in which customers can easily view stock,

place orders and track them. It is important to consider how you can help your clients find solutions that will allow them take advantage of this change. An online eCommerce platform integrated directly with inventory management, like that offered by Unleashed Software, coupled with great accounting software, like Xero, provides complete end-to-end sales order management for your clients.

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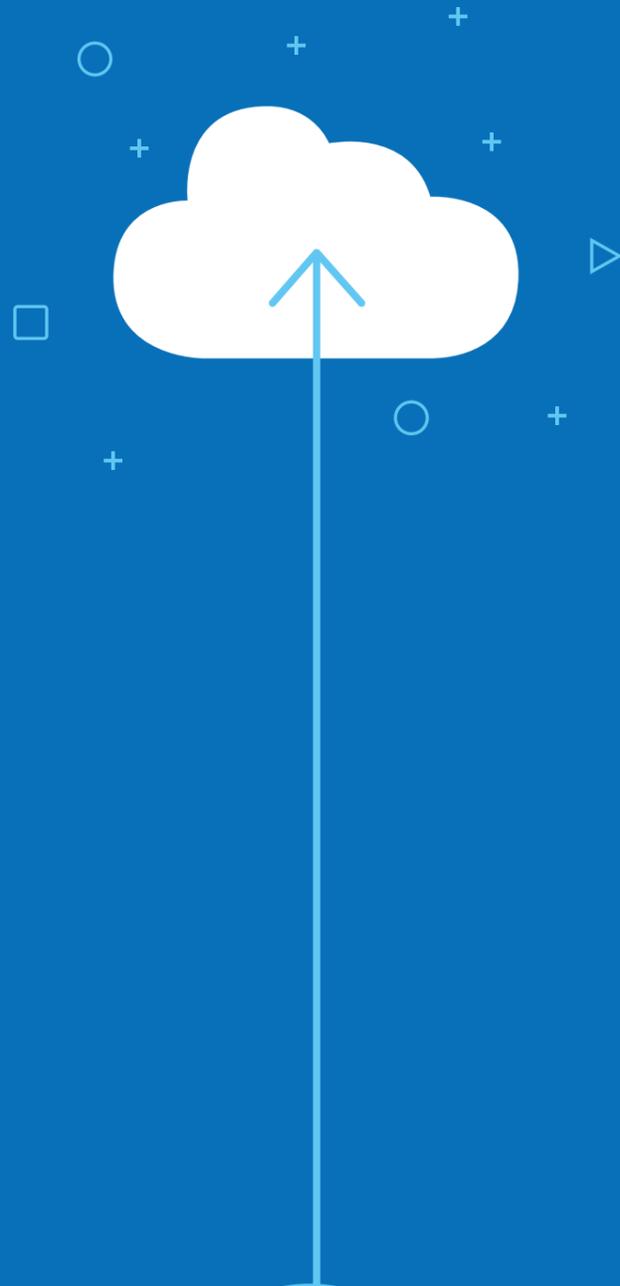
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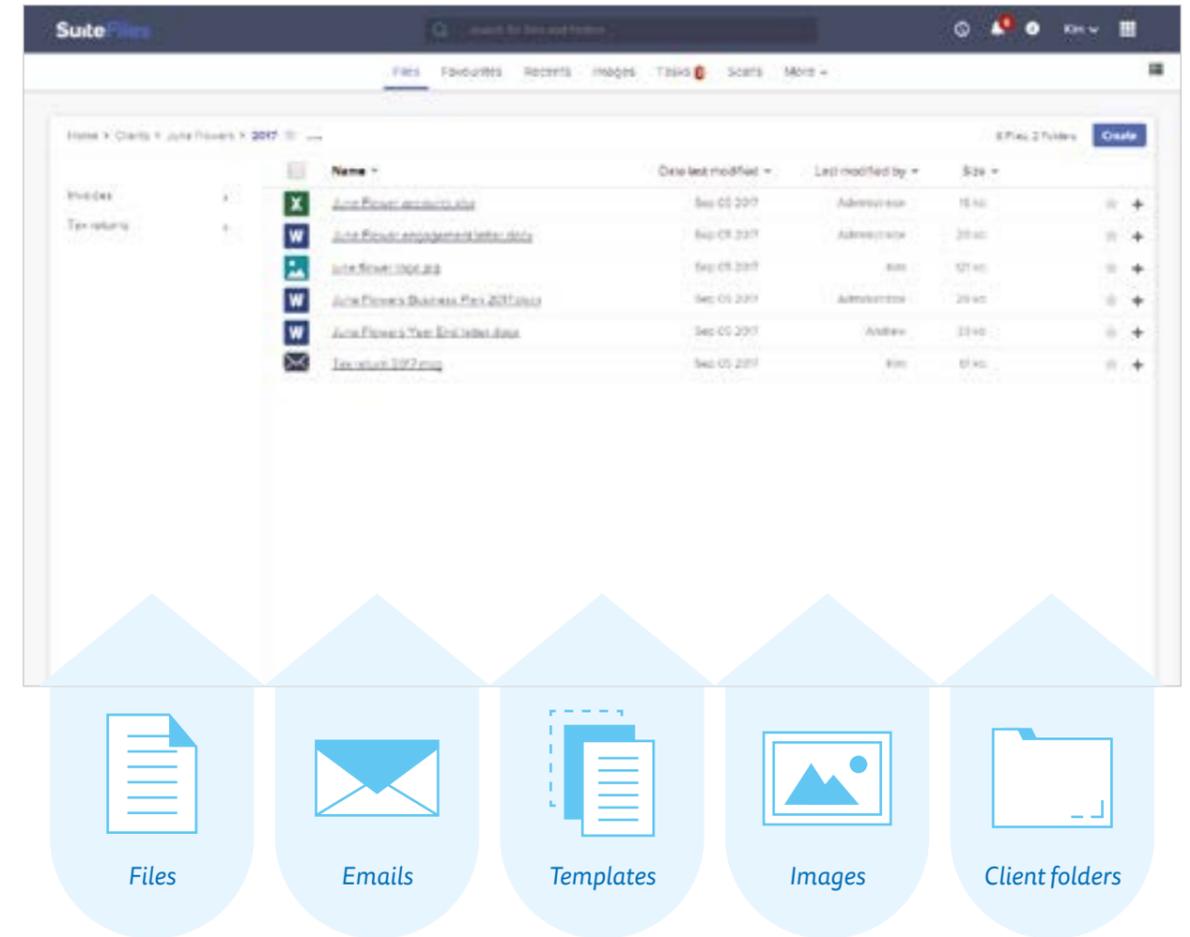
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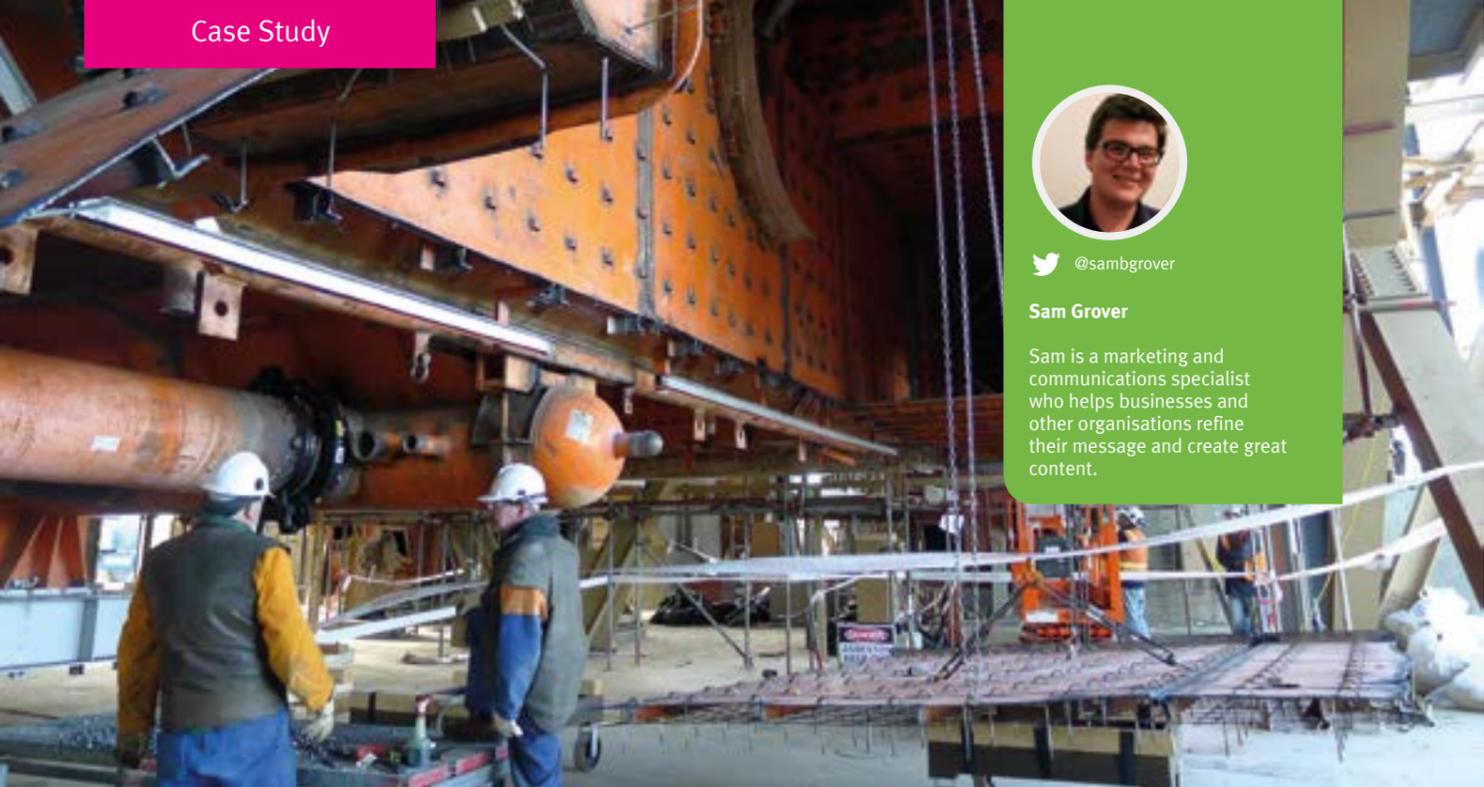


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Talk to the team at Xerocon Brisbane & London 2018



@sambgrover

Sam Grover

Sam is a marketing and communications specialist who helps businesses and other organisations refine their message and create great content.

# Xero works for large businesses too

We hear a lot about how Xero helps small businesses, such as cafés or bike repair shops. But what about larger businesses? Should we be hearing about how Xero helps them?

**A**fter talking to a couple of larger firms, I can safely say that the answer is “yes.” The reality is that Xero, when paired with other cloud apps, is just as suitable for large businesses as it is for small businesses.

Larger consulting, engineering and construction firms are great examples of this trend. These are the people who make sure your pipes work, who maintain the power plants that light up your house, and who build the factories that turn the minerals we dig out of the ground into the products we use every day. They design, project plan and manage teams that keep society humming along.

This is high-value, high-risk work. Talent in this sector isn't cheap and nor are the materials. To succeed, these firms need to plan ahead,

know how staff are spending their time, where their plant, tools, and materials are, and where they have capacity. Otherwise, they risk missing out on projects they could have bid on, or underbidding on jobs because they didn't know where or how their resources were tied up.

Synertec and SPI are both large businesses in this sector who happily use Xero. They've both grown their businesses over the last few years. I caught up with them to find out how they used cloud software to support that growth, and get the information they needed, when they needed it.

**Growing and going public with Synertec**

Synertec started out more than twenty years ago as a specialist

construction and engineering firm for the pharmaceutical industry. Over time, the business grew, and now they have sixty staff members, providing specialist consulting, construction and engineering services to all kinds of industries, including defence, oil and gas and water.

Things ticked along on spreadsheets and other manual systems, but five years ago they sat down to do some strategic planning for the future. It was pretty clear that to get where they wanted to be, they were going to need to move beyond spreadsheets.

This is where Tidy and Xero came in. Tidy handles the time and materials planning and tracking, along with the project and management accounting and Xero handles the financial accounting. The result is

almost an ERP system, full of up-to-date information for every project.

This is exactly what they needed to scale up. Running multiple projects in multiple locations creates a lot of information to be managed. Tidy helps Synertec capture this information quickly, and report it to decision-makers in the business. Kylie Brailsford, PMO and Validation Group Manager at Synertec said, “A managing director wants to know how a project is tracking, and what its forecast is. Then he or she can compare that against that project's budget. Xero and Tidy allow us to do that.”

This visibility lets managers make bigger-picture decisions more confidently, based on whether projects are forecast to be above or below their budget.

Accuracy is also particularly important for Synertec - they listed on the Australian Stock Exchange (ASX) in August of last year. Tidy helps to keep their information accurate by having everyone work in the same system for operations, which flows into the financial accounting system. That's a lot faster and more accurate than emailing spreadsheets around!

Looking back, Kylie can't believe how much better their data is now. “It was a real revelation when we made the switch, and there's no way we could operate on spreadsheets now.”

**SPI's expansion into new regions**

SPI Industrial provide mechanical, electrical and instrumentation engineering services. They're the firm you call when you have a big project that needs to be taken care of from start to finish. For example, they dismantled an entire power plant in New Zealand so it could be shipped to India.

They've been in Northland, New Zealand since the 1970s. A few years ago, they decided to push into some new markets - namely Auckland and the Bay of Plenty. “We had to do some hard yards,” says Managing Director Paul

Hebberd, “we'd do one little job, then use that as a foot in the door for the big jobs.”

It took some time, but now they're scaled up, with workshops in Auckland, Northland and the Bay of Plenty. They have a core staff of around one hundred people, and that can ramp up by fifty or more contractors, depending on the jobs they're working on.

This growth has created some new challenges. Now, they're spread across sites all over the country. They need to know where their staff and materials are at all times, so they can make decisions for the future.

This is where they use Tidy. Job supervisors, and people working on client sites and in the SPI workshops, use Tidy to track how time and materials are being used. Since it's all in the cloud, this information is instantly available for the staff at the head office. The information Xero requires to do its job flows directly from Tidy. Combined, this gives SPI the essentials of an ERP system.

Tidy's intuitive interface helps accurate information quickly flow from the front line to the head office. Many of the supervisors are from trades backgrounds, so don't have as much software experience as the people in the head office. “Lots of our staff aren't necessarily savvy computer users,” says Wendy Williams, Business Services Manager at SPI, “but they can certainly find their way around Tidy.”

The combined effect of the connectivity and ease of use means SPI not only saves time, it also gives staff the data they need to make decisions in real time. This boosts productivity and efficiency right across the organisation.

**Towards better resource management**

SPI have a number of specialist staff members using specialised tools. “The thing about our always in-demand staff members,” says

Wendy, “is that they can only be in one place at a time.” By scheduling and tracking time in Tidy, SPI knows where their staff members are working, and where they are committed in the future. This lets them plan jobs more effectively.

When bidding for jobs right through to project completion, SPI need to know ahead of time if they will have workers available with the right expertise and compliance certificates. For example, they may need a certain grade of welder who is also qualified to work in confined spaces and has the correct up-to-date health and safety certificate.

SPI use Tidy and EnableHR to keep track of who has the right set of skills for the project and tasks they are allocated. Most tasks are very dependent on other team members doing their job, so accurately managing this is key to overall project success; from financial, to quality, to health and safety. For instance, swiftly being able to make team changes when workers call in sick is critical to SPI. These cloud systems help them with job planning because it provides a continuous, accurate picture of who is available, and when.

**Wrapping up**

Scaling up businesses that bid and work on big jobs is a challenging task - the costs are high, and the resources are limited. Xero, Tidy, and other modern cloud apps effectively provide a modular ERP solution for these organisations. This gives even the largest SMEs a clear picture of what's happening across the business, so they can make good decisions based on accurate information. Synertec and SPI confirmed that cloud apps such as Xero aren't just for coffee shops. Combine them with complementary apps like Tidy and they're a powerful combination for big business too!

**FIND OUT MORE...**

Try FREE at:  
[tidyinternational.com](https://tidyinternational.com)

# How to improve your workflows with templates in SuiteFiles



@SuiteFiles

**Kim Anderson**, Marketing Manager, SuiteFiles

Kim is the Jane-of-all-trades Marketing Manager at SuiteFiles. After falling into software a bit by accident, she's now a passionate advocate for better tech and people-focused processes for businesses.

Common administrative tasks can be made simpler and faster by introducing standardised templates into your practice. Whether you're onboarding a new client or getting ready for tax time, those file (and email) templates will be what you reach for time and time again. Even better? With SuiteFiles you can integrate templates with Xero Practice Manager, meaning you'll always have the right information at your fingertips...

## Why use templates?

Templates are time savers and, in some cases, game changers for accountants. Turning common documents into templates will enable you to save time on admin tasks, to standardise work across your practice, and to significantly improve workflows and processes. By making templates accessible to your wider team, you'll never have

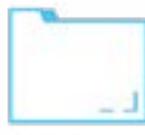
## Create 3 template types in SuiteFiles:



Files



Emails



Folders

to worry if they're using the correct file, particularly when engaging with clients.

SuiteFiles sweetens the deal by integrating with Xero Practice Manager, allowing you to pre-populate templates with client data direct from the source.

### How to use templates in SuiteFiles

SuiteFiles allows you to create and store your own templates for use across your practice. You can easily generate new documents, emails and entire folder structures using the templates you've created.

These are the 3 types of templates that you can create in SuiteFiles:

1. Document templates – Word, Excel, and PowerPoint
2. Email templates – include PDFs or other file attachments with it

3. Folder templates – create entire folder structures that you can generate with a click, e.g. a client folder when a new client signs up

Through SuiteFiles' integration with Xero Practice Manager, you can pre-populate file and email templates with client data from Xero, allowing you to personalise them for clients. SuiteFiles has a list of custom fields that you can add to templates, and even 'If This then That' logic to swap out pieces of information if one field doesn't exist. Common custom fields include names, emails, addresses, and salutations.

*In this next section, we'll show you how to create a file, folder and email template through SuiteFiles.*

### 1) How to create a file template

1. Turn any Office document into

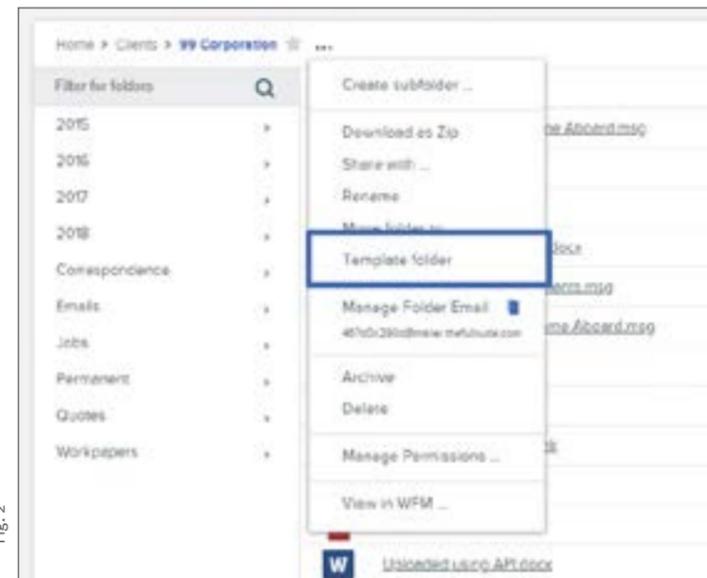


Fig. 2

a template by navigating to the file in the SuiteFiles web app and clicking on the three dots next to the file name.

2. Click 'Save as a template'
3. Give the template a name and click 'Save.'
4. To use the template, click on the blue 'Create' button and choose 'File from template' in the options menu (see Fig. 1)

### 2) How to create a folder template

1. In SuiteFiles web, create a new folder structure – this will become your folder template. You can include subfolders and even documents in this folder structure.
2. Click on the three dots next to the folder name, followed by 'Template folder.' (see Fig. 2)
3. Give the template a name and

a description. Click 'Create and close.'

4. To create a new folder from a template, click on the three dots next to the parent folder name and select 'Create subfolder.'
5. Give the new folder a name and choose the folder template you want to use from the dropdown list

### 3) How to create an email template

1. Install the SuiteFiles Outlook add-in.
2. Create a new email in Outlook – add the subject, body content and attachments you'd like to include. You can add custom fields to any part of this email template.
3. When you're happy with the email, click on 'Save as email template' in the Outlook ribbon

(see Fig. 3)

4. Give the template a name and tick the box if you'd like to include attachments.
5. To generate a new email using a template, open a new email and click on 'Insert from template.'
6. From the drop-down list, select the template that you'd like to use, followed by the correct client name if you want to pre-populate it with data from Xero Practice Manager

### How SuiteFiles customers use templates

Every accountant uses templates differently, but some common uses for SuiteFiles customers include onboarding clients, sending out engagement letters, and invoicing.

For Michael Risoli from MKS Group, the template feature in SuiteFiles has saved them a 'mountain of time' when sending out fixed-price agreements, and they print less as a result. They love that it's so simple to use, and that they can show someone once how to use it and they can get started straight away.

For Kate Harris from Connected Accountants, it's the folder templates they enjoy using most. "By using folder templates, it's a one-click job to create a new folder structure for new clients we bring on board. It's great – it's quick and simple, it's consistent if an inexperienced staff member sets up the folder, and we can customise the folder template to include files specific to the type of client we're signing up."

### FIND OUT MORE...

To get a free 30 day trial of templates in SuiteFiles and more, connect with us at: [suitefiles.com/trial](https://suitefiles.com/trial)

or for more reasons why accountants love SuiteFiles, read our other feature in this issue of XU Magazine: [Page 116](#)

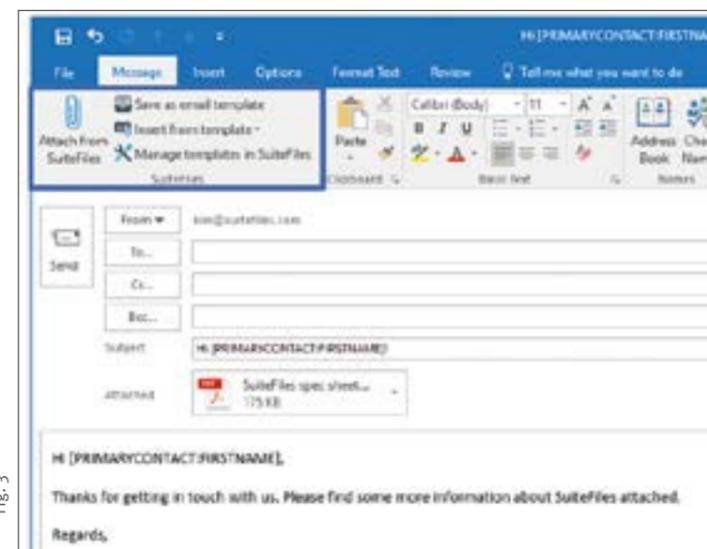


Fig. 3

Fig. 1



Taylorcocks and ApprovalMax establish end-to-end cost control:

## Find out how your customers can keep on top of spending across their multi-entity businesses

A cloud-based transformation story by a leading accountancy practice that helps its clients take full control of their expenditure...

**T**aylorcocks is an Accountancy Age 'Top 100' firm of chartered accountants and tax advisors specialising in the provision of bespoke, high quality accountancy, taxation and advisory services. As Xero Platinum Partners, and winner of Xero's 'Emerging Partner of the Year 2017' award, Taylorcocks is at the forefront of modern accounting technology. At Taylorcocks, we have carefully selected the software we partner with and built our app stack. In addition to Xero, Taylorcocks partner with the likes of Datamolino and the June 2018 Xero App Partner of the Month, ApprovalMax.

### Take spending under control, end-to-end

One of the recurring challenges is our clients' necessity to ensure that money spent is money spent well. This requires any expenditure, regardless of the legal entity it originates from, to pass through a rigorous check and set of traceable approvals first so that they tick all the boxes needed, for the right price, and with the right vendor. It's also essential that all invoices received from an approved supplier (Bills) are matched with the original Purchase Orders to prevent double-counted, erroneous or unauthorised payments.

This is a tall order for Taylorcocks' client-first approach because our clients frequently use an accounting system without the flexibility and data storage required to track and analyse spending accurately, even if done ex-post. Plus, our clients often lack the appropriate tools and internal business practices to define, follow, and enforce efficient business processes for spending management. They mainly use Excel spreadsheets to track Purchase Orders, and have no proper approval process and Bill-to-Purchase Order Matching in place. In consequence, all information regarding the Purchase Orders for a particular new invoice is added to the infamous tracking spreadsheet retrospectively – defeating the entire object of spending tracking.

### A case in point: A multi-site and multi-entity client

To combat this challenge, Taylorcocks maintains a selective set of certified software applications pre-integrated with the leading cloud-based accounting software Xero, including the bill digitisation software Datamolino. However, the core elements for accurate end-to-end spending

management and advanced expenditure control is delivered by the key capabilities of ApprovalMax:

First, Purchase Orders are created outside of Xero and then put through a strict approval process before being recorded in Xero. This way only correctly approved Purchase Orders appear in Xero.

Second, all invoices pass through a customised Bill approval process in ApprovalMax, and are matched with the previously approved Purchase Orders – before any payment takes place.

Third, multiple approval levels and the Automatic Approval capability really make a difference for our clients' needs and expectations. For example, if a Purchase Order is raised by an authorised user and within a certain spending limit, it will be approved automatically. However, if it exceeds the designated threshold, it will be submitted to one of the regional managers for approval. In case of an unusually high invoice amount, the Bill will be automatically routed to the regional director, ensuring total control over spending across all entities and locations.



@taylorcocks

**Andy Perrett**, Cloud Accounting Manager, Taylorcocks

Andy leads the cloud accounting project at Taylorcocks, a top 100 firm. He drives the project forward educating both clients and staff on the benefits of cloud accounting. As Platinum Xero partners, Andy has a wealth of experience in migrating clients onto cloud software, and in managing the change across the practice. Andy is also responsible for appraising the add-ons in the Xero Marketplace, building the Taylorcocks app stack and implementing them with clients.

...advanced expenditure control is delivered by the key capabilities of ApprovalMax

Fourth, all our clients (but particularly expanding multi-entity organisations with several separate management structures and quickly evolving internal processes), benefit greatly from the unlimited number of flexible approval levels ApprovalMax lets them set up. Significant time savings, higher productivity, and better data quality to boot. They also appreciate that they can now distinguish between Requesters, who raise Purchase Orders but are kept outside of Xero, and the managers who will review and approve.

### Incremental benefits

Apart from facilitating the compliant and audit-ready end-to-end management of Purchase Order and

Bill approvals, ApprovalMax enables businesses to quickly ascertain their overall spending to date with regard to a particular supplier. If this is beyond a certain threshold, ordering from that source can either be stopped and switched to another vendor, or associated Purchase Orders can be rejected.

... ApprovalMax enables businesses to quickly ascertain their overall spending to date with regard to a particular supplier

Our clients also favour the extraordinary flexibility ApprovalMax provides, and that the ease of setup and intuitive use is second to none. We have found that the roll out of ApprovalMax is very straight forward. Starting with just one company in a multi-entity (eight and counting) and multi-site group, we quickly deployed to each of the remaining units across the space of just a couple of months, and are ready for any other entities joining

the group in the near future.

Introducing ApprovalMax enables our clients to fully automate their internal processes related to Purchase Orders and Bills, and lets us focus on high value-added advisory and consulting services while spending much less time on typical accounting routines. This also enhances our clients' satisfaction and ensures Taylorcocks retains its position as a leading trusted advisor.

### FIND OUT MORE...

To find out more visit:  
→ [approvalmax.com](http://approvalmax.com)

## InView for xero

### Synchronise Xero invoices and bills to your calendar

- ✓ Calendar feed of your invoices & bills
- ✓ Alerts you to which bills/invoices are due today
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Get 20% off for 3 months

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Integrate with  
# slack

**PERFECT FOR**  
Freelancers, business owners, bookkeepers and accountants (they can offer the feeds to their clients)

# The journey to start, grow, merge or sell your accounting firm



@ignitionapp

**Guy Pearson, CEO/Co-founder, Practice Ignition**

10+ years of experience in professional practice and is a Chartered Accountant. His origin story starts at Interactive Accounting.

If anyone had sat me down and said this is exactly what you need to do when I started my accounting practice, I probably wouldn't have wasted so much time trying to figure out what would work and what wouldn't...

**M**y biggest challenge back in 2010 was that even if I had wanted to ask someone how to run a practice, no one was going to be able to tell me how to run a truly 100% cloud-only accounting firm.

Because it didn't exist.

There was not a single accounting firm in Australia or the world that had decided to go all in on running a true cloud accounting firm. So finding a cloud accounting mentor at this stage of my firm wasn't really an option.

Fast forwarding to today...

What a hell of a ride I've been on. Being able to scale Interactive Accounting from 1 person to 15 staff in 4 years, generating multi-millions in revenue and making our way into the top 100 accounting firms in Australia was amazing, and it felt truly rewarding.

We took this story on the road to try and tackle the notion of starting, growing and selling your accounting practice.

Let me give you some of my best advice and key points for what you should focus on when you start your accounting firm.

## Starting a firm: (Also known as frame and scramble). Year 1-2: Frame & Scramble

Think about why you left your role at your last accounting firm. You probably had the thought, "I can do it better"; that's where we all start. We get sick of working for the man, we weren't given opportunities to progress and we weren't able to influence the direction the firm was headed. (Keep this in mind as it's important for when you go to grow and scale your firm.)

Your first goal should be to get to 'Replacement Salary', meaning you've earned enough in your first year of business to pay yourself a decent wage. For whatever reason, everyone's magic number is normally around the 100K mark.

## Set your hypothesis

This is really important to do when you're just starting out, even if your plan changes over time (and it will). Your hypothesis allows you to create a plan and determine who you are trying to be, who you want to service and why you think they should be using you. Another way to say it is, you need to know your WHY? You need to pick your NICHE? And you need to understand what your VALUE PROPOSITION is.

I recommend you check out



leanstack.com to get a lean canvas model that allows you to clearly lay out your hypothesis (and, as I said, it will change over time and that's ok; you need to start somewhere).

## You need to create a brand (Marketing)

My best advice. Don't be a tightarse. I get it; you're an accountant, you don't know marketing and you're counting every dollar. Don't do that when it comes to your brand for your business. These days you can have a logo designed for just over £5 on fiverr.com, a website designed and built for a couple of hundred dollars. It's not expensive and the barriers to creating beautifully crafted material for your business are very low.

My second piece of advice, "Take your name off of the F\*\*King door." If you want to build and scale your firm. You need to create a brand that your clients and team can buy into. I don't want prospects, clients or anyone else calling Pearson & Co looking to speak to Mr. Pearson when they want to escalate or speak to the "main man". Think of a brand and a name that resonates with you. At Xerocon you'll be surrounded by hundreds of firms that have created amazing businesses around a brand. Think Accodex, Illumin8, Aptus Advisory, Consolid8, Two Sides. All amazing firms that have created a brand for themselves.

## Starting your firm

Do it from home. At this point

there's no point shelling out cash you don't have. Work from home, the cafe, the library and anywhere in between. The cloud allows you to meet people and work from anywhere; use it to your advantage.

## The Tech Stack

This will evolve as you grow and scale your firm and it's important to always review your tech stack every 6-12 months because technology changes so damn quickly these days.

Your practice management should be connected to your clients ledgers and the data should flow seamlessly. If you're running Xero, to Xero Practice Manager and Xero Tax you're on the right track at this early stage, as everything flows into the other seamlessly.

Look at apps and add-ons as full-time employees. I'll reiterate my earlier point. Don't be a tight-arse. Hiring your first employee will cost you anywhere upwards of 60K-70K full-time. Getting the right apps in your business to help automate all of the processes, and manual work you would pay an employee to do, is lucky to cost you 10K for the year. Even if you had Receipt Bank, BGL, Hubdoc, Spotlight, Fathom & Practice Ignition all running in your practice at the same time, it would

still be cheaper than hiring a full-time employee. And, to be honest, you'd probably be operating a hell of a lot more effectively.

In this day and age it's important to understand where you need a human resource versus technology. Technology is starting to replace the manual repetitive work. The other thing you need to realise is, even if you're not paying for the app, you're still paying for it in manual labor, your time and your wages. So, one way or the other you're paying for it; may as well work smarter not harder, right?

## My last couple of points on starting a firm

- False starts happen (That's ok, just keep moving forward)
- Plan for success. Remember, this is chess not checkers
- Hustle, Hustle, Hustle
- Go up and never stop



Thanks for coming along on the journey.

## FIND OUT MORE...

So far I've taken you through how to START your firm and what I learnt going through the journey. If you want to read up on how to grow your firm, you can continue to read that here at: <https://landing.practiceignition.com/start-grow-merge-sell>



# Flexibility and control - serving two masters in a more digital tax world



@sentahq

**Richard Sergeant** works alongside accountants in practice on business development related challenges. Richard is a regular contributor to AccountingWEB and international blogs, has presented and facilitated at the Practice Excellence conference, as well as judged the Practice Excellence Awards. He speaks at national and international network conferences including TGS and IACA, and works with clients in the UK, South Africa, Americas, Australia and China.

The evolving landscape of more digitised tax authorities has created interesting challenges for accountants, and many will be wondering how they can adapt their working practices.

With governments around the world developing closer digital relationships with taxpayers of all kinds, it's clear that there's a huge amount of new regulatory burden, but that undoubtedly means lots of available compliance work for firms. The question that practitioners are asking is how can they adapt and serve both clients and tax authorities?

**O**ne company thinks it has the answer to future-proofing practices. From inception, practice management pioneer, Senta, has been offering a platform that works not only in different practices, but in different countries too.

From the outset, James Kilford, CEO of Senta, recognised that whilst every firm needs to comply with the same rules imposed by the local compliance regime, each has a unique view on how it should serve its clients.

"The availability of new technology potentially offers ways of adapting and scaling their operations to suit their clients, their practice's needs, and the local regulations," says Kilford.

Before working with accountants, he spent his career within highly technical environments, witnessing the impact of tight regulation in industries like banking

and aviation. His belief in the importance of flexibility in the face of increasing regulation provides an interesting glimpse into the ethos driving forward this rapidly growing and international software business.

"It's the mix of building software that complies, but also offers individual freedom - that's a challenge I really enjoy," Kilford explains. "The first time a practice owner told me they were using Senta to differentiate from their competitors, I really felt like we were making a difference."

#### Contending with a growing workload

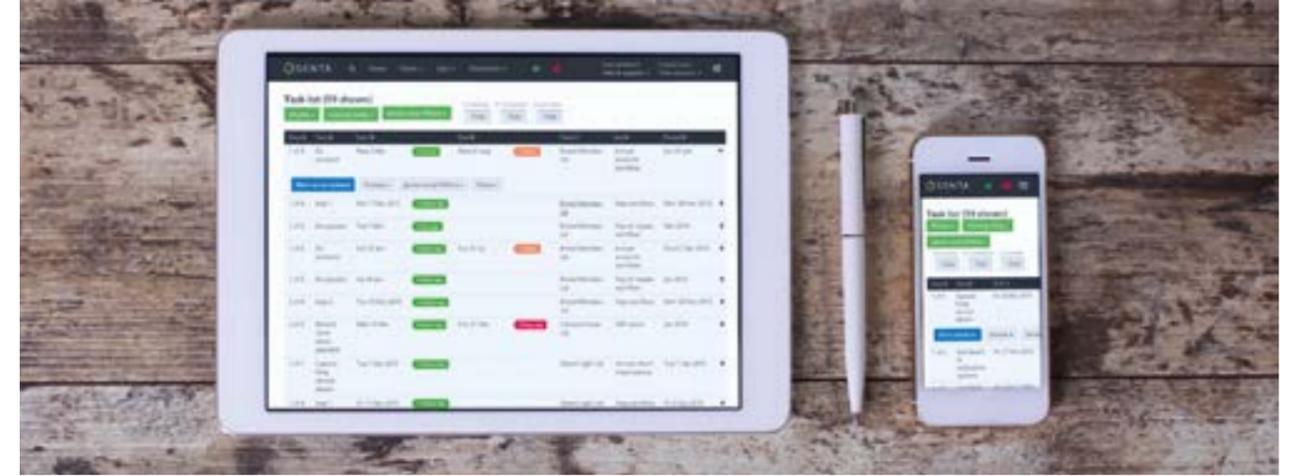
This theme of enabling a very individualised toolset, and also accommodating the sweeping changes required by governments, sets the company apart in a world of by-accountants-for-accountants software. "It became clear that the broader digitisation of tax all over

the world was going to impact on the amount and depth of reporting that businesses were going to have to contend with, and accountants help to deliver on," says Kilford.

"When we got into the detail, we saw that this was going to keep building up over a period of years, meaning a lot of data and deadlines for accountants to manage. And, given the real inflexibility and cost of some existing practice management providers, we could see that there was room for alternative options".

#### Supporting the firm's culture, not just its tasks

A strong focus on flexibility and control, especially around the flow of work through the practice, is at the heart of Senta. "We know that every client is different, but each practice is too - with its own set of demands and, more importantly, culture to accommodate. You can't



do this if the way you pass work and stick to deadlines doesn't give you that flexibility from the start."

Senta can be used to create highly customised workflows, enabling firms to shape the software and processes around how they do business. "Some clients have amazed us with what they have done with the workflows. It's fascinating how one firm in the UK could be creating quite intricate ways of handling a small number of intensive, high value clients, and another in Australia is handling greater volume, and has a more customer-service approach", Kilford explains.

#### Integrations are key

Another key part of this is integrations; something that Kilford has obvious passion for. "From the outset we were determined to work with as many of the systems as possible that accountants and their clients currently use. Through APIs we can pull in all kinds of useful data and insights, and this is a big area of growth for us as we expand into new territories".

"A great example is how Senta brings in clients' details and deadlines from Companies House in the UK, or data directly from

the chart of accounts in the bookkeeping software into the client record. These things deliver efficiencies and reduce the number of small errors that build up over time whilst hopping between systems."

It's also helped to establish Senta as a serious contender for accounting firms that have international operations. "Being cloud-based means that passing work between teams is so much easier. We can use a combination of common workflows across the practice, and different ones to cope with the local compliance regimes. And obviously we can accommodate whatever software they are using in each office."

"Focussing on the accountancy sector means we can take the things we learn from our clients and find improvements that should suit nearly everyone, regardless of which jurisdiction they operate in. We have one client that has 25 staff working in 4 different countries; something that is now much easier to do with the help of Senta."

#### Keeping pace

Looking to the future, Kilford sees Senta as the prime tool to help evolving firms. "The move to a more

digital relationship between the tax authority and tax payer is an incremental one: from the recent introduction of Single Touch Payroll in Australia, to near real time sales tax reporting in Spain, or MTD for VAT in the UK next year. Every time there's a change, the impact is felt by accountants - both positively and negatively. Our job is to make sure that whatever is mandated can be turned into workflows that make sense and integrate with practices - not the other way around."

With an increasingly complex and digital regulatory burden for businesses to bear, there's undoubtedly plenty of work for accountants to help with for years to come. For firms, the critical question could actually be how easy will it be for them to adapt and scale their own workflows in order to continue to provide and develop a consistent, and reliable service.

#### FIND OUT MORE...

Try Senta now, FREE for 30 days: [senta.co/xu](https://senta.co/xu)



Check out [approvalmax.com](https://approvalmax.com)

#### 6 Productivity Killers in Accounting

##### PRODUCTIVITY KILLER ONE:

Paper-based processes and manual data collating





# For the love of efficiency: An interview with FGS Advisory Managing Director

We sat down with Daniel Richardson, Managing Director of FGS Advisory – a Xero and WorkflowMax implementation partner – to talk about his love of efficiency, his desire to achieve productivity for his clients, and why WorkflowMax is the perfect tool to accomplish this...

**“ I fell in love with WorkflowMax and Xero at the same time” says Daniel.**

It was back in 2012. “I was working in an accounting firm. There was quite a lot of excitement around Xero and its new acquisition – WorkflowMax. I saw a huge opportunity for our Australian practice, because we didn’t really have a system to manage our jobs and workflow.

From an accounting business perspective, job management was

always a huge frustration. No one knew where workflow was at or who was working on what, particularly across our three offices. There was no way to easily tell which jobs were profitable and which weren’t.

So, that was the main attraction for us. Then, as we started to work with some of our clients in terms of quotes and invoicing, we found WorkflowMax to be a suitable end-to-end solution for a lot of other service businesses.”

### The journey from accountant to Implementation Partner

“Personally, I enjoyed the implementation process a lot more than I enjoyed the accounting process,” says Daniel.

And that’s where it all began...

FGS became an implementation business. They work with a lot of accounting firms to implement Xero Practice Manager (the accountant’s version of WorkflowMax) and have branched out and taken WorkflowMax into other professional services industries such as creatives and engineering who have similar pain points and needs.

“We love looking at the way a business operates and finding efficiencies. We also look at what isn’t adding value and how software like WorkflowMax can make work processes quicker and easier.”

### Adding value to clients

“WorkflowMax is a real foundational

piece for a business because it covers four core components: quoting, job management, invoicing and reporting.”

“There are other softwares that handle job management well, or invoicing (like Xero), but not many that cover all four. And we’ve come across a lot of businesses that want ONE piece of software that cuts out double entry and does all four. WorkflowMax is our answer for them.”

In Daniel’s extensive experience, for engineers, “a big appeal in a system like WorkflowMax is being able to get better control over invoicing and cutting down admin time so that staff can be redeployed to other areas such as marketing to help grow the business.”

Similarly with agencies, as they grow quickly and look to add more people, “they want a system that allows them to scale without having to add too much cost, which is where we can provide a robust recommendation.”

### Key factors for a successful implementation

“Over the last eight years we’ve built a solid process,” says Daniel. “One thing that really adds to success, is to make sure there’s at least one project champion for every seven or eight staff. As the team start to use the software, they need people who can lead the charge and champion the cause through the business.”

“Conducting a system review is also integral to successful implementation” adds Daniel. “It should be pretty comprehensive depending on the size of the business. It’s about really understanding how things get done in the business, how a solution like WorkflowMax will add value, and where we might need an additional add-on to complement as well.”

However, software implementations can sometimes be a painful experience for companies.

### The FGS implementation process



### Tips on minimising the pain

“Firstly, make sure you take the time to do it right. Secondly, always manage the change. By following a structured process for implementation - the pain points can be considerably reduced, making it a lot more successful from the first day it goes live.”

### What success looks like...

“One of our clients is Asset Management Engineers in Western Australia” says Daniel. “They provide asset management, inspection and assurance services to Australian and International ‘resources, energy, rail and industrial sectors’. The company has around 30 staff. We implemented WorkflowMax for them a few years ago on a recommendation from their accountant.

It was a 4-5 month project and Workflowmax has completely revolutionised their business.

Trevor Hughes, Managing Director, Asset Management Engineers says “There are not enough superlatives that describe how good WorkflowMax is. Our invoicing process now takes days rather than weeks resulting in huge efficiency gains and improved cash flow in the business. Staff can enter time directly from any device, anywhere in the world, eliminating over 19 weekly reporting spreadsheets.”

**“It’s the most awesome, fantastic, best bit of software we’ve used”**

Trevor Hughes, MD, Asset Manager Engineers

### A complete end-to-end solution

“WorkflowMax is a fully integrated system in its own right. The modules of quoting, jobs and invoicing flow through really nicely. It’s just such a good job management or workflow tool - it gives you a dashboard of who’s working on a job, where it’s up to and when it’s due – 3 great things that a lot of professional services don’t track particularly well!” says Daniel.

There’s also some fantastic integrations with at least 30 other add-ons - so it really is Xero’s heavy-hitter, great for businesses with more advanced needs, offering plenty of customisation, powerful financial analysis, and end-to-end control of your projects and your team.

\*\*\*

*Daniel’s experience implementing WorkflowMax, Xero Practice Manager and Xero spans 8 years. It’s safe to say FGS has become one of the foremost cloud integrators in the AU region. If you are considering WorkflowMax in your business, using an authorised partner, like FGS Advisory is well worth it - even Trevor says so!*

### FIND OUT MORE...

- [www.workflowmax.com](http://www.workflowmax.com)
- [www.fgsadvisory.com.au](http://www.fgsadvisory.com.au)

## WHY WORK WITH AN IMPLEMENTATION PARTNER?

- 1. Business transformation ethos**  
Using business strategy, systems and technology, implementers help you focus on the goals required to go through a business transformation.
- 2. Cloud experts**  
Demonstrated in-depth knowledge of cloud services across various industries, in particular, they really know the ins-and-outs of WorkflowMax, XPM, Xero and other complementary add-ons.
- 3. Change management stars**  
Masters in scoping, set-up, training and education they can take your whole organisation on a journey ultimately resulting in delivering – and exceeding – expected business outcomes.
- 4. Proven performers**  
Rely on demonstrated experience and proof of successful implementations through the use of proven implementation processes and methodologies.
- 5. Local market wizardry**  
Implementers will have key knowledge of the local market in which you do business, understanding data privacy and other regulations, plus deep knowledge of local nuances.

# Keep customers loyal, win new business

With more accounting practices to choose from and increasingly discerning customers, accounting firms must carefully consider how to win new customers, retain their existing ones and stand out with their service offering...

**W**ith thousands of start-ups launching each year, firms should strategise how to get their share of this new business and maximise their earnings potential.

So what are some practical steps practitioners can take to get ahead and carve their niche?

## Reconsider your billing

Many accountancy firms still rely on hourly and fixed rate billing, the tried and tested method of their predecessors. Whilst it may seem like the most straightforward way of working, this approach actually harbours many disadvantages for accountants and fundamentally inhibits growth. It does this by presenting a conflict between generating profit, providing value for money, and working more efficiently.

A better approach is value pricing, which assigns the price of a product or service according to its perceived value by the customer. It doesn't calculate prices by the hours taken to deliver the service, or existing market rates. By removing the focus in billing from timesheets to providing business value, you'll benefit from increased revenues and deeper client relationships.

## Track the right KPIs

Firms should reassess their metrics and how these might have changed in recent years; considering the following, apart from the typical financial measures, to ensure their practice is capitalising on opportunities in a timely manner:

- **Churn vs. new sign ups:** Clients leave service providers for all sorts of reasons, but if firms are able to track customer wins versus losses, they'll gain a better understanding of the correlating factors which underpin these peaks and troughs. As retaining customers is typically much less expensive than acquiring new ones, this insight will help management to hang on to more clients for longer. Whilst this can be done manually, where there is budget, specialised data analytics solutions can effectively map the customer journey.
- **Account management. Capacity vs. demand:** As firms take on new customers, are they hiring enough employees to share the load and give each client enough time and attention? This will be especially important when offering costly advisory services, where clients will expect attention to detail and



@AutoEntry\_OCRES

**Brendan Woods** is founder and CEO of **AutoEntry**

Originally a software developer in the hedge fund space, he quit his job and started the company to automate data entry for accountants and bookkeepers.

AutoEntry, automates data entry of purchase and sales invoices, receipts, bank statements and more, providing significant time and cost savings. A trusted supplier to over 2,000 accounting firms worldwide, providing them with intelligent solutions for data entry automation.

personalised service from the team.

- **Service delivery cost:** Measure how much time is taken to deliver certain services, especially those which are admin heavy, compared to the profitability of these services. Consider what functions are draining resources, and if these can be phased out.
- **Customer satisfaction:** Happy customers underpin growth for any business, so firms should implement a measurement system to assess how satisfied their customers are and if they're likely to recommend their services to others. One way to do this is via a Net Promoter Score (NPS) survey, through the likes of Survey Monkey. These surveys can be automated and sent throughout the year, providing recipients with questions to answer on scale of one to ten. This data can then be analysed and set against external benchmarks to give firms a clearer indication of their performance.

## Become a one-stop shop

Businesses can often rely on more than one accounting practice to meet all of their requirements, so practitioners should consider

expanding their remit beyond core accounting and tax services to ensure customers don't have reason to stray.

Providing firms have the appropriate authorisation, additional services they could offer include those related to probate, as well as business valuations and strategic advisory. The latter of which is becoming increasingly lucrative, as more businesses seek out the counsel of their accountants to more effectively manage risk and monitor the health of their business.

## Identify your ideal customers

Not all clients were created equally, and whilst firms might be reluctant to turn down any new contract, the reality is that some customers are both easier and more profitable to work with than others. Accounting firms should consider what their ideal customer looks like in terms of size, sector and the services they require, and target customers based on these attributes.

For instance, strategic advisory work can offer high margins so customers who request these services should be prioritised - as well as 'quick wins' i.e. when it's obvious at first glance how value could be driven for a prospect.

Accountancy is a service based business with human relationships at its core. A lack of rapport or too much time spent chasing payment, can often make a particular project more complex than the fees are worth. Therefore, those clients who have a flexible outlook, positive attitude and who pay on time should (in an ideal world!) be the only ones firms choose to work with.

## Strengthen your marketing

A good marketing strategy is worth its weight in gold, and whilst marketing doesn't have to be complicated or expensive, firms must craft their 'brand', so prospects can identify what their practice offers and how it's unique. Firms should build their following on Twitter and LinkedIn, by posting

quality content and targeting businesses in the local area through sponsored campaigns and possibly advertising via Facebook Ads Manager. A well maintained company blog will do wonders for search engine optimisation (SEO), and firms can also publicise case studies here as well.

Practitioners could offer free consultations for new customers, and speak at industry events to build their profile. They could consider launching an online learning platform as a lead generation tool; posting webinars and tutorials on topical issues such as tax deductions or working in the cloud.

## Save time by automating activities

Those who haven't digitised their practice by now are missing out, and firms should make every effort to automate their workflow to drive operating efficiencies. For instance, a CRM solution such as Salesforce collects client data from telephone and email communications, helping to streamline customer



engagement. Elsewhere, automated onboarding tools simplify processes such as issuing proposals and creating invoices.

One of the most effective and immediate ways accountants can put automation into practice, is through the elimination of manual data entry. AutoEntry, a Xero add on, helps users do exactly that, by capturing and analysing scanned and photographed bank and credit card statements, bills, invoices, receipts and more, automating data entry into a user's Xero account.

AutoEntry helps users to work smarter with its broad range of features. For instance, AutoEntry captures tax summaries by default and if requested, full line item details including description, quantity and unit price. AutoEntry also remembers how users categorise expenses, such as the relevant supplier account, nominal account and tax code without ever creating duplicate supplier accounts or posting duplicate invoices in Xero. AutoEntry even matches invoices to purchase

orders.

**Partner with the right software providers**

For those already using accounting software, partnering with these types of service providers can provide valuable opportunities for profit sharing and growth.

For instance, those who join the AutoEntry Partner Program can help their clients to become more productive through their use of its technology, whilst benefiting from the generous incentives offered by the scheme. The program offers a range of subscriptions, which rewards partners based on how many new customers deploy AutoEntry through their referral. Partners also receive complimentary AutoEntry credits, for use within their own practice.

**Looking ahead**

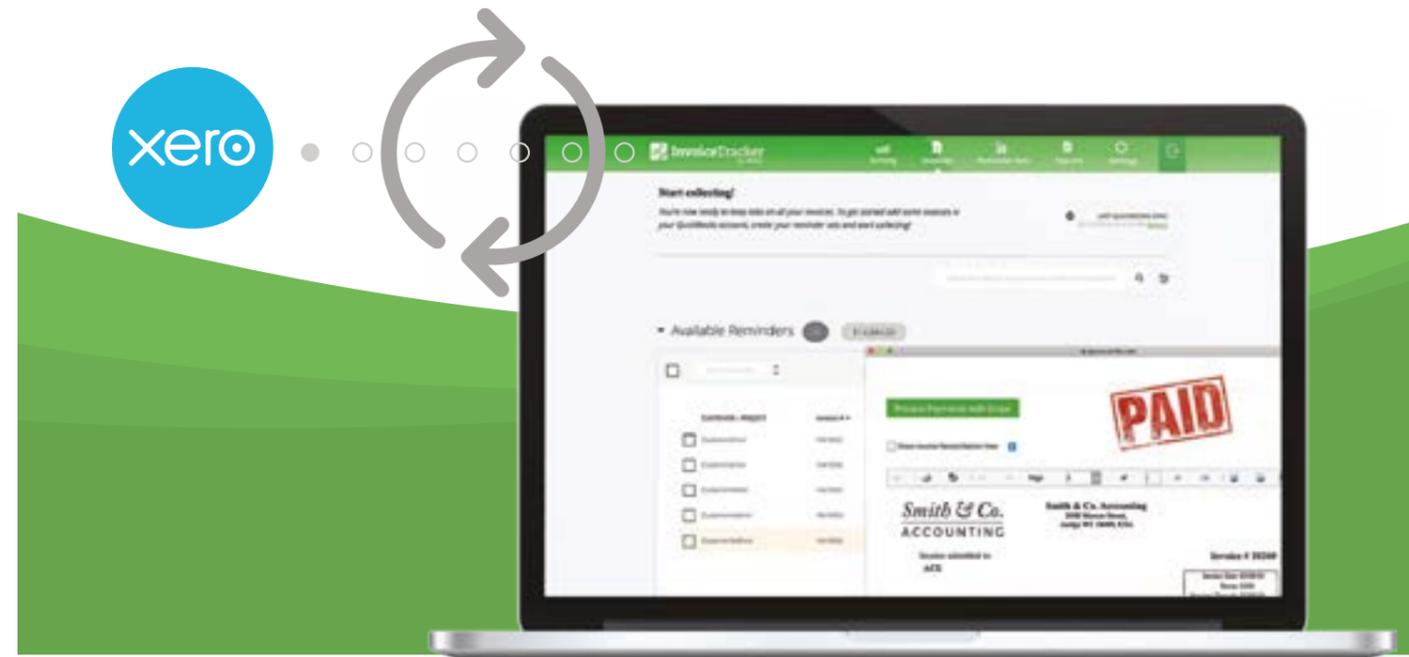
Providing excellent service to clients is key, but making sure your practice thrives in a competitive environment takes

strong leadership and meticulous planning. Accounting firms should continuously evaluate their performance, and reflect on client feedback in order to refine their service offering.

Within this, making the right partnerships and understanding how to implement automation in practice represents a considerable opportunity for accountants to retire outdated processes and position themselves as indispensable business advisors. In this Age of Technology, this approach will increasingly be key in helping firms to maintain customer loyalty and make a name for themselves in the industry.

**FIND OUT MORE...**

Start your free trial today!  
AutoEntry is available via the Xero App marketplace or  
[autoentry.com](http://autoentry.com)



**Automate your accounts receivable – get paid faster and improve your cash flow**

Invoice Tracker's automatic email reminders follow up on unpaid invoices so you don't have to, connect and sync your invoices from Xero in just a few clicks.

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Invoice Tracker also syncs automatically with Xero accounting so emails stop as soon as a payment is made.

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**Detailed Reporting**  
Know the state of your accounts receivable with dashboard reports and insights



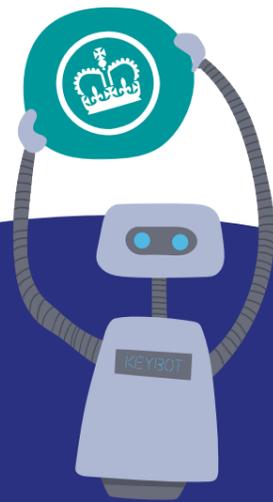
Tax code headaches are a thing of the past...

**Automated tax codes are here!**

KeyPay has automated the process through its API integration with HMRC. Bureau businesses are now able to automatically update employee tax codes, as well as their effective dates directly from HMRC for each employee.

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# Four key trends for global payroll management

As a business expands its operations around the world, it has to navigate a number of challenges. Each new office can present a different set of opportunities – and a different set of legislative requirements. From a people perspective, a combination of local hires as well as expat employees from the head office is critical to ensure a successful expansion plan...



@PaySpace

**Bruce van Wyk**, Sales & Marketing Director, PaySpace

A founding member of PaySpace, Bruce has over 16 years of experience in designing, conceptualising and implementing functional payroll and HR solutions for local, multinational and blue-chip organisations. Bruce heads up Finance and Sales at PaySpace with a love for entrepreneurship. Exposure to the technical, consulting and client requirements have given him vast experience in solution design, comprehensive international tax legislation, quality human resource approaches, talent trends and client relations.

**F**ortunately, the rapid advancement of the cloud has not only enhanced how many businesses manage their day-to-day operations, it has enabled international companies to transcend geographical borders and centralise their core functions. The payroll department, for example, can sit in the head office and seamlessly integrate with the company's other offices and departments around the world.

A global payroll solution, either managed in-house or entrusted to a single service provider,

presents a huge step forward for international businesses. It relieves payroll and HR departments of a hefty administrative workload and reduces the number of service contracts that need processing and managing. With the seamless integration to cloud-based accounting software, like Xero, the process is even more streamlined.

That said, to get the most from your global payroll solution, you need to consider the best approach for your business. Here are four of the most important practices and policies trending for global payroll in 2018 and beyond.

## 1) Data protection and encryption

In May 2018, the General Data Protection Regulation (GDPR) came into effect and changed how businesses around the world manage their data. While the GDPR focuses primarily on customer data, it also extends

to the data businesses keep on their employees. Its mandate is to protect the personal information of EU citizens – regardless of where in the world they are based. So if your company employs EU citizens in its Nairobi office your payroll processes now need to comply with GDPR legislation, as well as local Kenyan legislation.

Achieving – and maintaining - GDPR compliance is not a simple task. Many payroll managers are under increased stress as they shoulder new responsibilities. Working with a payroll provider that is already GDPR compliant is a great way to share the load and maintain adherence to the law.

A payroll provider can also assist businesses to manage their data security. Stricter data protection legislation means that employee records need to be retained for much longer. And data encryption now needs to meet a much higher

standard. Employers don't have to manage all this on their own – a payroll software provider can help companies keep their data secure.

## 2) Collaboration and self-service

Cloud technology is enabling global employee self-service systems. These mobile-friendly payroll systems make it much easier for employees and managers to access payroll and HR data from anywhere at any time. All they need is a smart device and an internet connection.

Employees are also able to set up their profile in the language of their choice. As payroll services become more personal, there will be fewer communication barriers within global businesses. Not only can each employee access their payroll and HR information with greater clarity, teams can work together across multiple locations and time zones. Using real-time information, colleagues won't have to hunt for the latest information.

## 3) Outsourcing and global expansion

The power of cloud technologies has made things much easier for HR and payroll professionals. Cloud-based payroll software, for example, means that your company can now manage its global payroll from one home-base. There is no need to establish in-country payroll teams – or to manage contracts with different service providers across multiple offices.

As an added benefit, outsourcing certain processes to a specialist payroll provider ensures 100% compliance. Their expertise in multilayer governance provides a level of legislative oversight and knowledge that will support your

business growth. With a team of always-on payroll professionals by your side, your company can expand quickly and efficiently.

In no way does this make your payroll department redundant. In fact, by outsourcing your payroll, your in-house team will have less administrative work and more time to focus on strategic, value-adding work.

## 4) The new-age payroll manager

As the digital age transforms the payroll landscape, the role of the payroll manager is changing too. Payroll professionals need to enhance their agility on the job, stay curious and embrace new technologies that are relevant to their business needs. The industry as a whole is evolving rapidly and global payroll solutions are enabling businesses to achieve more in a much faster time frame.

Given the complexity of implementing and managing a multinational payroll, today's administrators must be switched on. Their job now requires them to analyse information, identify trends and patterns and make recommendations for improvement. Fortunately, access to information and automated administrative assistance is increasing. As such, payroll managers no longer need to dedicate most of their time to data entry tasks and can focus on business-critical work.

To achieve this, payroll teams need to step out of their comfort zones, work closely with other departments and invest in digital innovation. If payroll operates in a silo or ignores new technologies, it will negatively impact your business' competitive position in

the market.

International businesses need the right skills, knowledge and attitude to expand successfully into new markets. Key to this is adopting the right technology and working with a payroll provider that can provide data-driven support. Global payroll need not be a challenge, but rather an enabler of bigger and better business success.



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Visit our website at [payspace.com](https://www.payspace.com)

**ApprovalMax**

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**6 Productivity Killers in Accounting**

**PRODUCTIVITY KILLER TWO:**

Chasing Approvers via Excel and email

# Introducing InView

## Synchronise Xero invoices and bills to your calendar

How often have you forgotten to chase that client who hasn't paid on time? Did it hurt your business cash flow? How about those "overdue" and "final notice" letters for those bills that you were sure you had paid?

**R**unning a small business can be a logistical challenge, especially if you're a solo freelancer. From obtaining new prospects, to servicing your existing clientele, time for business administration tends to slip away quite rapidly.

InView is a certified Xero add-on that helps you keep on top of the invoices and bills that might otherwise fall by the wayside.

By signing up for InView, you can vastly streamline the process of

keeping you and your team in the loop of important financial dates by integrating your Xero account automatically to your usual calendar apps.

### How does InView work?

With a **one click integration**, InView generates an iCal feed for use with all your desktop and mobile calendar applications.

All major calendars are supported, including:

- Apple
- Google
- Outlook
- Yahoo
- Plus any calendar that supports feeds

### What is an iCal feed?

iCalendar (iCal) is an open standard for exchanging calendar and scheduling information. iCal feed enables an application to fetch, push or synchronise date and time based data to another calendar application (like Google calendar).



@rikkipitt

Rikki Pitt, Director of **Jemcode Limited**. London, UK.

Jemcode is a software agency, specialising in web product development for a variety of sectors including finance, insurance, and retail.

InView provides you with a personalised iCal feed per Xero organisation that you authorise with us. The feed contains information about when your Xero invoices are due, its status, and a direct link to itself on Xero.

### Who's it for?

- **Businesses and freelancers**  
If you run a business and use Xero for invoicing, then InView is for you. Keep yourself up-to-date with the status of payments and know who to chase and when.
- **Xero accountants, bookkeepers and advisors**  
If you manage accounts for your clients, give yourself an added value proposition by using InView. Give your clients the iCal feed or simply grant them access to your business calendar.

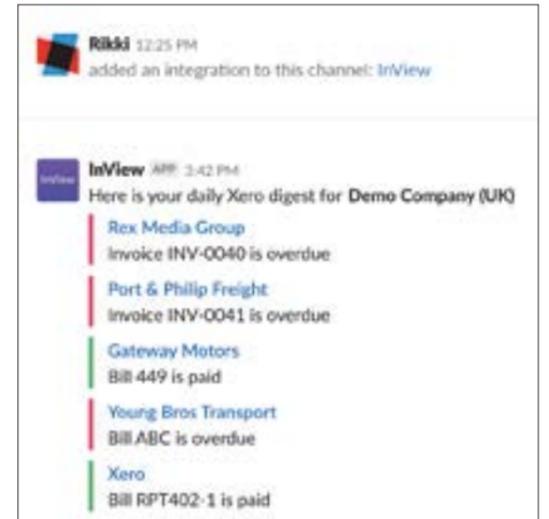
### Larger teams

For companies that have multiple people that need to know organisation financials, you have a few options:

- Share the InView iCal feed
- Invite people to subscribe to your calendar
- Use our new Slack integration

### Integrating with Slack

You can integrate InView with your Slack workspace channels to receive a digest of your Xero invoices and bills that are due each day.

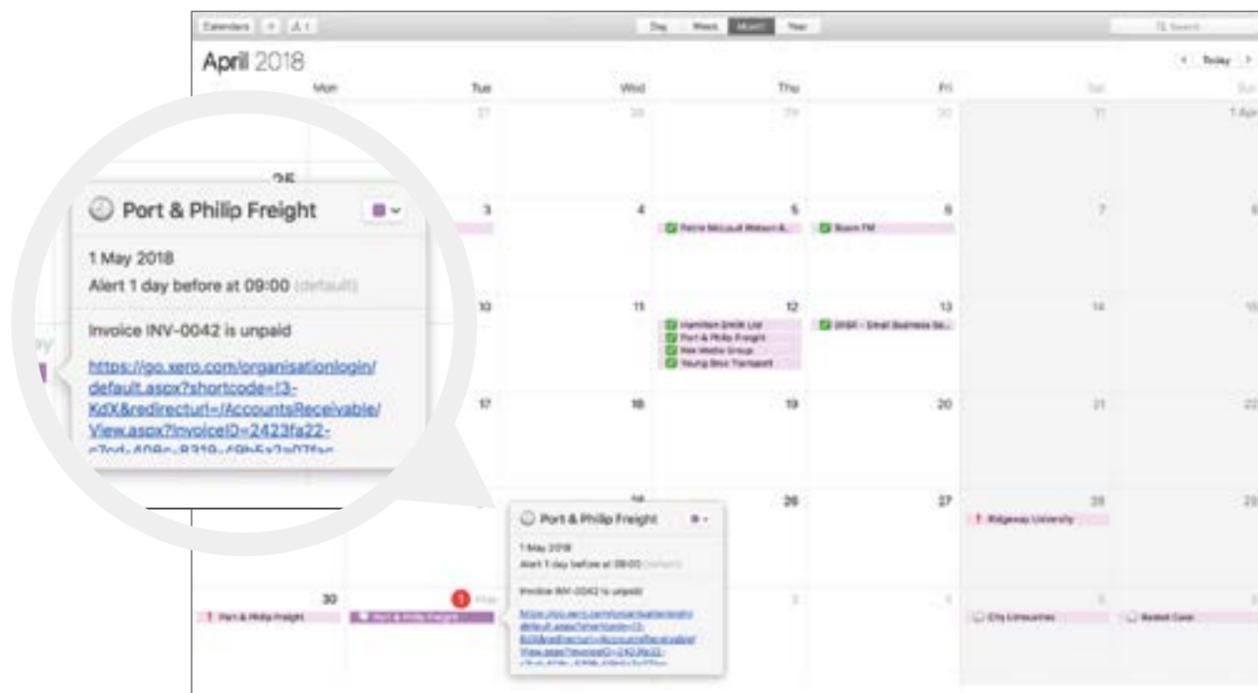


### FIND OUT MORE...

To find out more about InView or how to integrate with your favourite calendar app, visit: [www.inviewapp.com](http://www.inviewapp.com)

The readers of XU Magazine are eligible for **20% off for 3 months** by using the coupon **XUMAG**.

Signing up is easy, it doesn't require a credit card and you'll have 14 days to try out all the features!



## Is your client too big for Xero?

Find out how to support Ecommerce and Wholesale clients with their complex data requirements.

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## Q&amp;A

David Urry

Co-founder / Chief Experience Officer

IntegraPay

**XU:** It's great to finally have the chance to sit down with David Urry, Co-founder and Chief Experience Officer at IntegraPay. David, I wondered if you could start by telling our readers a bit more about IntegraPay and how it can benefit them?

**DU:** Thanks, it's great to be talking with you.

IntegraPay is a payments technology company specialising

in recurring billing and real-time payments. We're a service provider in Australia, New Zealand and the USA, and have direct processing capabilities in the UK, Europe, Asia and the Middle East.

Our focus is to provide businesses and organisations with secure payment processing and merchant services. We give them access to the full range of preferred payment options, including all major credit and debit cards, and direct debit –

plus BPAY in Australia, and ACH in the USA.

As you would expect from a technology company, our payment solutions can be fully integrated with business management and accounting systems for a seamless customer experience. One of our most popular integrations is our payments add-on for Xero, which automates invoice payments and reconciliation.

**XU:** You are one of the innovators behind IntegraPay. It would be great to hear the story of how you and Chris began IntegraPay?

**DU:** My brother Chris and I have been working in payments for over twenty years. We founded IntegraPay in Brisbane in 2009 – we're looking forward to celebrating our company's tenth anniversary next year. Prior to this, we had already started two other successful payment companies, both of which are still thriving today.

So, back in 2009 we decided to create something new, focusing on three key principles – integration with other systems, international reach, and most importantly, integrity. Hence the name IntegraPay. We wanted to create a better, more efficient and more connected solution than before.

We've achieved this by being one of the most heavily integrated payment solutions in Australia and globally.

One thing I'm delighted we've been able to do is help so many Australian clients launch overseas. Working with us they've been able to avoid having to start all over again whenever they've entered a new market.

Integrity is a core value across the entire company. Trust, honesty and transparency are so important when processing payments. It's central to how we deal with our partners, clients, banking and technology partners, and our staff.

**XU:** It's amazing to see how ideas can become reality. In the last nine years, how have you seen IntegraPay develop and grow to benefit its customers?

**DU:** The business has grown the way we thought it would, and our product offering has developed further than we expected. We've enhanced the idea we started with.

We've always embraced new

technologies, and there's been a lot of change in financial technology over the last decade. We're constantly looking at changes and innovations in different countries, and how they can benefit our clients.

We've delivered solutions that our clients have wanted. We've listened to their feedback and delivered enhancements and new solutions that have helped them grow.

**XU:** IntegraPay has been integrated with Xero for quite some time. How has this integration helped your customers?

**DU:** As a recurring payment specialist, our initial focus was on direct debits as we found a lot of Xero users were wasting time managing external debit systems and manually reconciling payments. So we made it easy for any Xero client to accept payments by direct debit from bank account, credit card or debit card, by simply sending a Xero invoice. Direct debits are set up and controlled within Xero and all payments are automatically reconciled.

We then increased the types of payment options customers can choose to pay. We introduced bank debit and BPAY for single invoice payments alongside traditional card payment options. More ways to pay increases the chance of being paid on time.

And finally, IntegraPay's reconciliation capability is a major time-saver for Xero users. Our automatic reconciliation of invoices and payments, and one-click bank reconciliation for multiple payments makes it so much quicker and easier for our clients to balance their books. We've transformed a tedious task into a joy.

**XU:** We all love getting paid quickly and on time. How can IntegraPay make this happen?

**DU:** Using IntegraPay's direct debit processing, our clients are getting paid on the

due date. Forget nine or thirteen days faster – IntegraPay gets you paid on time, on the due date.

Without a payment add-on, sending out an invoice is no guarantee of getting paid. Our auto-debit technology enables a business to take payments exactly when they need it.

And ultimately, accepting all the major payment methods is always going to speed up payments – we're enabling our clients to do that.

**XU:** How can IntegraPay help accountancy firms that are coming away from time-based billing and moving towards monthly fixed-fee billing?

**DU:** As experts in direct debit processing, we're enabling businesses to automate their recurring payments. This is perfect for monthly fixed-fee billing.

With our solution, setting up a schedule for auto-debit is as easy as setting up an invoice. Once the customer agrees to the direct debit, payment is taken automatically each month.

Our solution also works well for the time-based billing model where fees vary each time. By adding a direct debit agreement to a one-off invoice, a business can get agreement from their customer for future payments to be taken from their account. Invoice payments are automated each time, with the customer getting notification of the amount.

Our solution is flexible enough to cater for both billing models.

**XU:** Security is always at the forefront of people's minds. At IntegraPay, what have you done to ensure secure payments?

**DU:** The security and compliance of client data is integral to our business. Protecting our clients' business, brand and their customers is our top priority.



We maintain the highest level of compliance with the Payment Card Industry Data Security Standard [PCI DSS]. All data is tokenized, stored, processed and transmitted within our secure network. IntegraPay also has an Australian Financial Services licence.

Our technology infrastructure is highly secure, reliable and resilient. With three data centres in separate locations, we're able to keep our payment operations running securely during adverse conditions.

All this gives our clients and their customers peace of mind that their data is in safe hands.

**XU:** I know that customer experience is of paramount importance to the IntegraPay team. How do you ensure your users give their clients quality customer service?

**DU:** As IntegraPay's CXO, enabling our clients to deliver great customer service through our solutions is my main objective.

Firstly, we're offering the widest choice of payment options available in a Xero add-on. Customers love the ease and convenience this gives them.

IntegraPay automatically updates a business's records within Xero as soon as a customer makes a payment. Clients are always up-to-date with their customers' invoice and payment information. This removes any doubt and confusion.

Great customer service can be harmed by over-eager debt chasing. By automating payments for Xero invoices, a business doesn't have to chase late-payers. Payments are debited on the due date. We also use technology and processes that reduce the number of payment rejections. And any payments that are rejected can be followed up by an automatic email or SMS reminder, avoiding those awkward conversations with loyal customers.

We're always looking to enhance our clients' customer service,

relationships and reputation with our payment solutions.

**XU:** IntegraPay is a worldwide solution. How have you had to adapt your solution to deliver IntegraPay to a worldwide market?

**DU:** Our solution is extremely flexible, so it's always been easy for us to adapt it for different countries. Our commitment to tailoring solutions for partners and clients has enabled us to support the major platforms for each market.

The payment landscape varies for each country we operate in – for instance, in Australia and New Zealand there's a 50/50 mix of card payments and bank debits; in the USA it's mostly card payments; and in the UK there's a lot of bank debits.

We're able to support transactions worldwide through a combination of our own facilities and an extended network of payment partnerships. Our focus now is to expand our own facilities in each country that we're involved with.

**XU:** The IntegraPay team will be exhibiting at Xerocon Brisbane. Why is Xerocon so important to the IntegraPay team?

**DU:** For all of us involved in accounting technology, Xerocon is a must-attend event. And we're delighted that its coming to Brisbane, our home city.

Xerocon gives us a chance to hear about the latest trends and developments in accounting technology. We love hearing from businesses about their challenges, their needs, and how technology is helping them grow.

It's such an important networking event for us. It's always good to catch up with our clients that are attending, and with the Xero team. And it's a great opportunity to introduce ourselves to businesses that are new to us and Xero.

**XU:** I have seen the IntegraPay team at various events and they always seem to have great swag! What's in store for those attending Xerocon Brisbane?

**DU:** Yes, another advantage of attending conferences is walking away with some great swag. We've got a few swag ideas, so you'll have to wait and see. Make sure you visit our stand - we look forward to seeing you there.

**XU:** Is there anything exciting lined up for IntegraPay over the next six months?

**DU:** We're now processing over \$1.2 billion [AUD] a year, helping thousands of businesses grow through digital payments. We're looking forward to further growth in this financial year.

Without giving anything away, I can tell you we'll be rolling out various product enhancements and additional payment security, all of which will benefit Xero users. And as a company we'll be expanding our global operations – watch this space.

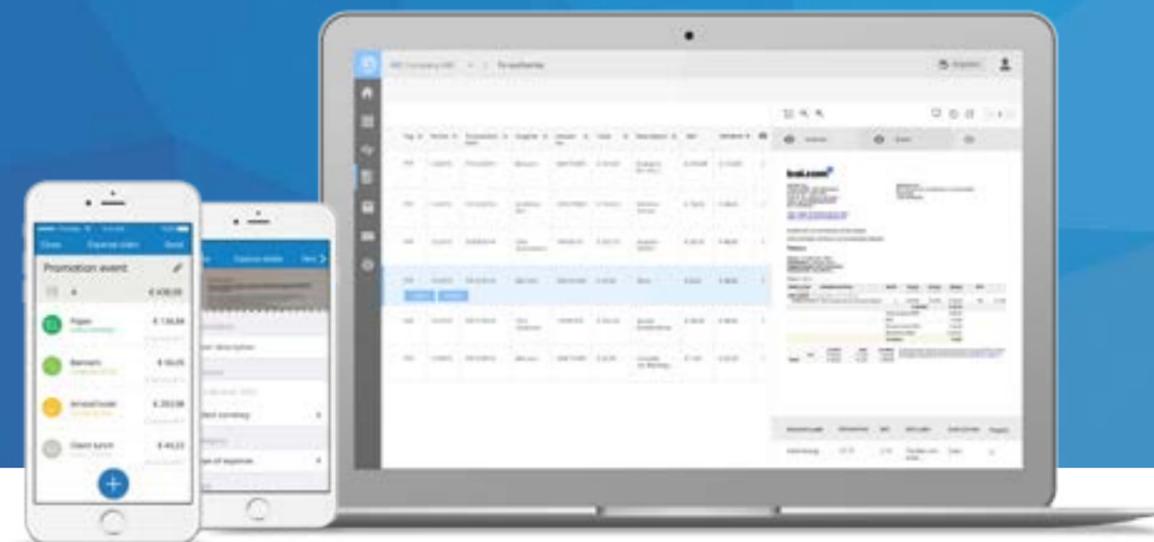
IntegraPay is involved in two rapidly growing and overlapping sectors – digital payments and accounting technology. We're well-placed to deliver the tools and technology for businesses and organisations to succeed. Exciting times ahead!

#### FIND OUT MORE...

IntegraPay will be exhibiting at Xerocon Brisbane, 5-6th September 2018.

Further information about IntegraPay:  
 → [www.integrpay.com.au](http://www.integrpay.com.au)  
 Or for businesses in the USA:  
 → [www.integrpay.com](http://www.integrpay.com)

# Basecone: where accounting magic happens



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Documents will be stored safely in Basecone for 10 years



#### Real-time processing

Basecone recognises invoices and automatically codes them in real-time



#### Controlled workflow

Documents can be easily checked and approved by customers or yourself



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# New Xero resources to recommend the right apps to your clients



@Xero

**Nick Houldsworth**, Executive General Manager, Ecosystem at Xero

Nick has led marketing, sales and product teams in high growth software startups across a range of sizes. He's a self-described "app-a-holic" and host of the Xero Developer Podcast.

Like many other industries, adoption of automation is disrupting traditional accounting and bookkeeping practices. The smart are embracing the change. They're moving clients to the cloud, recommending apps, and growing revenue faster for clients, and their practice as a result...

**A**s an accountant or bookkeeper, you're one of the business advisors small businesses trust the most. Your clients look to you for advice on ways to reach their business and financial goals. One of growing areas you can offer your clients more value, whilst strengthening your proposition as a trusted advisor, is through app advisory.

When your clients use apps, you

both reap the benefits. According to our research, practices who provide app advice grow revenue 60% faster and SMBs who use cloud apps grow revenue 30% faster.

Yet, whilst almost a third of our accounting and bookkeeping partners are actively advising clients on apps, another 52% are interested in doing so, but are unsure how to get started. That's where Xero's latest resources come

in - to help you get started on your journey to success with app advisory.

### The right tools to help you get started

This year, at Xerocon Brisbane, we'll be introducing you to new resources and insights to empower you to become advisors of the future through app advisory, including a session I'll be presenting on day one: Recommending the right apps for your clients. I'll also be sharing some exciting new features and tools to make app advisory even easier, and how to use these alongside Xero's App Playbook series.

Whether you're coming to Xerocon or not, these resources will arm you with the knowledge to begin your app advisory journey and feel confident recommending Xero-integrated apps to your clients.

Start with our App Advisory Playbook. It shows you how you can

## Deep dive at Xerocon Brisbane

We'll also be doing a deep dive into these industries at **Xerocon Brisbane**, as well as introducing you to even more tools. Here are the sessions we have in store to help you on your road to success with app advisory:

**Xerocon Day 1: Wednesday 5th of September 2018**

- 2.30pm** - Recommending the right apps for your clients
- 3.30pm** - App deep dive: professional services
- 4.30pm** - App deep dive: trade and construction

**Xerocon Day 2: Thursday 6th of September 2018**

- 11.30am** - App deep dive: retail and ecommerce



## Smart data capture for bills, receipts & statements



### How AutoEntry Works

Simply upload or email your documents to AutoEntry and it will extract all of the relevant data. AutoEntry matches documents to existing supplier accounts and expense categories in your accounts software.

You will receive an email notification letting you know that your data is ready. You can then click to post bills directly into Xero.

Sign up for a **FREE** trial today.

“Using AutoEntry with Xero has helped me **reduce costs up to 30%** compared to the traditional bookkeeping method.”

Peter Gray | 360 Ledger Services



“I love AutoEntry, it is great being able to have multiple companies and users under the same subscription.”

Lucie Howard | Leo Bookkeeping

“AutoEntry is a no brainer for accountants. **Literally does everything** - Bank Statements, Sales Invoices & Purchase Invoices.”

Anoop Rehal | Smith Williamson

“Customer service and support are **fantastic** - would highly recommend. We use it as an add on to Xero and it integrates perfectly. The credits rolling over for 3 months is a definite bonus too.”

Rob Tapp | Knill James



Reviews for Xero Marketplace

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We're also bringing you the tools to

strengthen your value proposition as an industry specialist. After completing the app advisory playbook, you can move on to our three industry specific app playbooks, which cover trade and construction, professional services, and retail. They explain the most common needs and pain points for these specific industries, and match

them against the features of Xero and the apps available in the Xero app marketplace, making choosing the right apps easy.

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# The three C's of surviving the bookkeeping revolution

To the outside world, bookkeeping may seem an unlikely industry in which to find 'a revolution'. However, this won't be news if you're a regular XU reader. So much has changed in the last decade...

**M**odern bookkeeping is now unrecognisable from the days in which businesses would give their accountant a shoebox of physical receipts once a year – although sadly, this isn't completely unheard of today either.

Despite undoubted progress, many bookkeepers are still nowhere near maximising the full potential of the revolution happening in their industry, even bookkeepers who use Xero, which puts them way ahead of the pack. Using Xero is a great starting point from which to do more – to give clients an even better service, to make more money through advisory and to position themselves as a trusted advisor who can anticipate needs and wants before being asked. There are many bookkeepers who will become a victim of the revolution if they don't adopt this mindset and instead let complacency set in. So how do bookkeepers stay ahead of such a fast moving revolution? For me, it all boils down to the three C's: cloud+, counsel and cash.

## Cloud+

The adoption of cloud services has transformed accounting and bookkeeping over the past 5 years. So much so that Cloud vs Desktop software isn't even a relevant debate. It's no longer a competitive advantage, but what people have come to expect.

Bookkeeping software has been a huge part of this change, and that's been made possible by the advancement of text recognition software (and the fact that everyone has a camera on their smartphone). Tools like ReceiptBank and AutoEntry have led the way by becoming platforms that all bookkeeping can be managed from. With more and more invoices being sent via email, it's easier than ever to forward them on to the bookkeeping software of choice. And with Xero recently adding this functionality to their software, these services are just going to keep getting better.

The next step for bookkeepers is to clearly define their arsenal of tools they can rely on to give their clients the level of service they need. A tech stack is the web-equivalent of a smartphone screen, with each app having its own place and purpose. Have you properly explored the benefits of using services like HubDoc, Expensify, Pleo, Expend or Curve? Are you in a place where you can confidently tell your clients that you are moving on from old tools and invite them to come with you?

## Counsel

This notion of inviting clients to join you in the use of new tools and applications is more than just a pleasantry. You may think that clients will be resistant to change, and some will be. But for many, it's the exact opposite. There's nothing

progressive businesses like less than thinking that they are not getting the best and most up-to-date service possible – even if that means venturing into the unknown. They've put their trust in you as their advisor and you don't want them thinking that they are missing out on better advice. If you don't offer new options and show that you are adapting with the times, you're paving the way for another bookkeeper to step in and do so. It's as simple as that.

Bookkeepers need to think like market researchers or startups; to speak to their customers, ask them what they really want and show them what's possible, using the new tools available.

## Cash

When showing a small business what's possible, there's often only one financial metric that they really care about: cash flow.

Early-stage businesses need to know, in granular detail, what their cash flow looks like at any given moment – when money is going in/out, where, why and how. Only then can they plan for the future and grow their business through investment, or weather the storm during tougher times.

Businesses need their bookkeepers to help them make this a reality. Business owners are looking for integrated solutions and real-time



@floatapp

Colin Hewitt is the CEO and founder of Float, an Edinburgh based cash flow forecasting add-on for Xero.

After running his own agency and struggling to produce cash flow forecasts in a spreadsheet, Colin founded Float. Now he and his team are on a mission to help small businesses understand their numbers and produce accurate forecasts in a fraction of the time compared to spreadsheets.



reporting. They're looking for accountants and bookkeepers who really understand technology and how to deploy it effectively. They need trusted advisors to educate them on what an efficient system looks like. They need to introduce bookkeeping practices that can make their financial processes run smoothly, with one source of truth for complete visibility on their cash flow.

Solid bookkeeping is the cornerstone of any business' financial data. If they don't have up-to-date data to make decisions on, they're unable to take advantage of

all that the cloud revolution brings. This has been a sticking point for some time, since financial reporting has historically been either timely or accurate, never both.

## Leading the charge

We're long past the point at which utilising the cloud was optional, the revolution is here and with it is an incredible opportunity for bookkeepers to lead the charge. If they don't they'll be left behind.

In summary, my advice to bookkeepers is to rethink the services you are offering, starting

with understanding what kind of services your clients really need (without waiting for them to ask). Then identifying the software tools that can help make this a reality and use the output to provide insight, which will make you an invaluable part of their team.

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@accountkit

Paul Murray, CPA, founder of AccountKit and Director at Murray Business Solutions, Adelaide

When Paul and his wife and business partner, Paula, began to migrate their accounting practice to the cloud, they found some tasks remained difficult and time consuming. So together they created AccountKit, to help accountants like themselves simplify and speed up their cloud-based processes. AccountKit automates some day-to-day accounting functions and keeps all client correspondence in one easily accessible location. With AccountKit, complicated tasks such as managing client correspondence, creating business structure diagrams and managing equipment leases and finance, become faster, simpler and easier.

# AccountKit:

## Efficiency tools for the cloud age

Paul Murray shares how AccountKit's suite of efficiency and visibility tools make your cloud-based practice more efficient...

**A**s the co-owner of a cloud-based accounting practice as well as AccountKit, I truly understand what it's like to walk in our customers' shoes! In fact, the issues I faced with syncing and centrally managing client data when migrating my practice to the cloud were what led me to build AccountKit.

Today, AccountKit's cloud-based suite of practice tools is designed specifically to optimise aspects of the Xero and XPM experience for accountants. Here's what that looks like:

### 1) Illustrate complex business structures and entity relationships for clients in minutes

AccountKit's **Client Map Tool** allows you to create custom diagrams of client business structures and entity relationships. Any changes you make to client relationship

information are automatically synced between Xero Practice Manager and AccountKit, and you can manage all your client relationship data in one location without having to jump in and out of every entity.

### 2) Track all client correspondence across your practice

AccountKit's **Correspondence Register** can be used to record and store phone calls, meetings, file notes and drop-ins in a central repository. Simply open the tool and choose the type of correspondence you want to record from the dropdown menu, to automatically populate information like the client's name and contact details directly from Xero Practice Manager.

### 3) Automate inter-entity loan reconciliations

The **Inter-Entity Loan** tool within AccountKit pulls data from multiple Xero files and accounts, enabling quick, regular reconciliations of inter-entity loans throughout the year. This equals significant time savings and greater accuracy across complex client groups – keeping accounts in balance throughout the year.

### 4) Automate fuel tax credit calculations straight out of Xero

Many accountants are familiar with the not-so-user-friendly ATO fuel tax calculator tool. AccountKit's **Fuel Tax Credit Calculator** can be used with or without Xero to quickly and easily calculate FTC. If connected to Xero, AccountKit extracts litreage information from the description and automatically applies the correct fuel tax rate according to the type, use and applicable period.



### 5) Manage equipment finance more effectively

Using the **Equipment Finance Tool**, you can plug the details of any client asset purchase and associated finance arrangements into AccountKit, build a finance schedule (either regular or irregular) and automatically post the interest entries to reconcile the schedules throughout the year. You can also easily process the required entries to refinance or pay out a schedule should the need arise.

All this is brought together on the **Client Group Page**, which is the central hub where you can see all your client information and tools from a single screen.

#### FIND OUT MORE...

To see how AccountKit works for your business, sign up for a free trial at: [account-kit.com](http://account-kit.com)

# 5 steps to scenario planning for CEOs



@CAforecasting

**Michael Ford**, Co-Founder and CEO, Castaway Forecasting

Michael is a specialist in the financial and strategic aspects of running and growing successful businesses. He is both a Chartered Accountant and a CPA and brings more than 30 years' experience across a range of disciplines and industries. Michael is an entrepreneur and thought leader on growing businesses. In the last 20 years, he has founded a series of successful businesses, including Castaway Forecasting.

The role of a CEO is to make decisions in the face of uncertainty. But without the right insights to support those decisions, they are little more than guesswork...

**A**n effective scenario planning process provides CEOs with the insights, clarity and confidence to make the right strategic decisions for their company's growth.

Follow these five steps to make it happen:

## 1) Invest the time to make it happen

Good scenario planning doesn't happen by accident. The siren call of day-to-day business challenges can be hard to resist, and our brains aren't wired to switch easily between short-term responsive decision making and long-term strategic thinking. But where focus lands, action follows. As CEO, you need to be deliberate about investing time to look into the future.

We're not talking here about looking just a few months ahead.

Ideally, the CEO planning horizon extends from twelve months out to five years. Why? Because at this timeframe, we can quieten the noise of the everyday and concentrate instead on the bigger picture. The further ahead we see risks and opportunities, the longer we have to prepare the business to make the most of whatever is coming.

It's important to book time for these sessions in the calendar. Plan to get out of the office. Find a place that puts you in a creative and perceptive frame of mind. Set yourself up with whatever materials help you think better. Invite the key members of your team, including external advisors who can bring a different perspective.

## 2) Identify a range of scenario stories

Nobody knows for sure what's going to happen in the future. For

most businesses, there are many possibilities. So, the task here is to map out a series of scenario stories, each one based around a different set of assumptions. Make sure to consider both good and bad possibilities.

There are two ways to approach this step ... 'today into the future' and 'the future back to today'. We find that working both directions triggers more creative thinking. We're looking for a small number of scenario stories for more in-depth analysis. How many? Start small to keep it manageable - ideally three and no more than five.

**Today into the future** begins with today's business and then considers what could change, e.g. gaining or losing customers, competitors or staff, doing more or less of current activities, starting new initiatives, stopping existing ones. The questions here often start with 'what would happen if ...'. Start

by looking at the coming twelve months, then repeat the process for the next twelve and so on.

**The future back to today** begins with a series of visions of where you want the business to end up and then steps back to today. Questions here start with 'what would it take to achieve ...'. Document these goals and then work backwards, identifying key milestones that need to be met along the way. You might need to iterate these pathways a few times to make sure they're realistic - it's a great sanity check.

## 3) Model the impact of each scenario story

To better analyse each of the scenario stories, we need to model the financial impact they would have on the business.

Take care not to simplify this modelling process. It might be tempting to increase every sales number by say five percent, but that's not scenario modelling, it's just 'fun with maths'. Good modelling goes deeper, often into specific business drivers - things like headcount, tonnes and hours. You can then model how changes in these drivers will affect the business.

By definition, most (and perhaps all) of the scenario stories you have mapped and modelled will not arise. Even so, this step is essential because understanding the impact of the different scenarios leads directly to the next and most important step ... the game plan for how you will respond.

## 4) Game Plan responses to each scenario story

If you have followed all of the steps so far, you have reviewed a whole range of business possibilities, expanded a few into scenario stories and then modelled the financial, business and operational impact of each.

Now it's time to game plan your response. With the time and space to think clearly, you can work through the detailed insights from each scenario story and decide how you will respond at each stage ... ahead of time.

Questions in this step start with 'if XYZ scenario starts to emerge, what should we do?'. The best game plans identify trigger points, define action plans and set out who is responsible for making things happen.

Having identified the trigger points

of each scenario, you can work out the best metrics to monitor ... effectively building an early warning system for the business.

## 5) Build a Reality Review process

Scenario planning is never a one-off exercise. The world keeps on changing and your plans need to keep on evolving too. The Reality Review process is the key to this evolution. It strengthens the team's planning and forecasting muscle, as well as their ability to respond to an increasing number of scenarios.

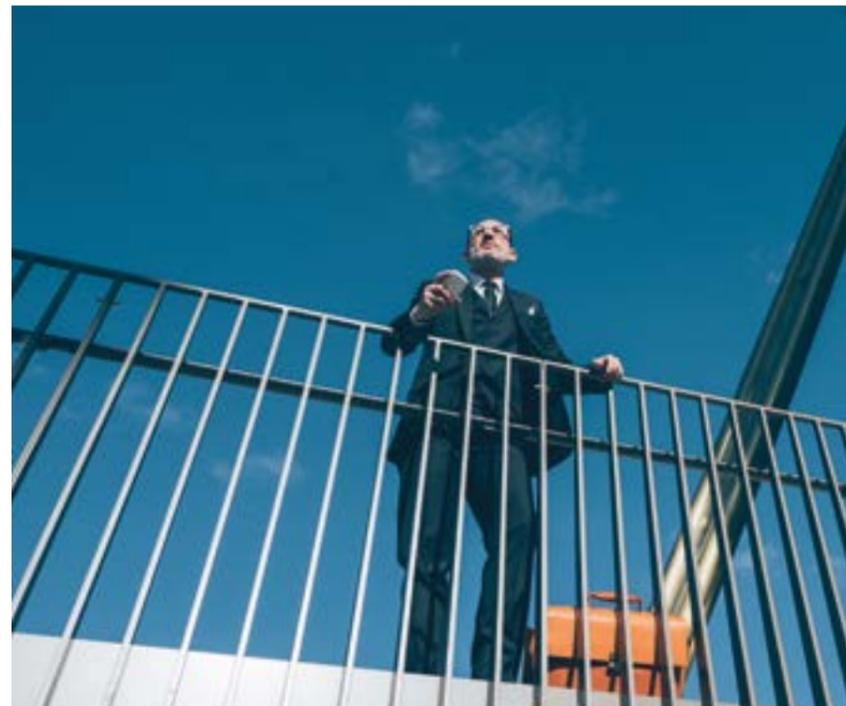
The Reality Review examines what actually happened and asks the following questions:

1. What did we think was going to happen?
2. What did happen?
3. If 1 and 2 are different, why didn't we see it coming?
4. How can we improve our planning or early warning systems?
5. What (if any) assumptions need to change in our planning?

Choose how often reviews should happen and book them into the calendar. It could be every three, six or even twelve months. The right frequency depends on the pace of change facing the business, both internal and external. Faster growth and more rapid change means more frequent reviews.

A well-developed scenario planning process is the key to helping CEOs reduce the guesswork and make great decisions in the face of uncertainty.

*An effective scenario planning process provides CEOs with the insights, clarity and confidence to make the right strategic decisions for their company's growth.*



## FIND OUT MORE...

To find out more about Castaway Forecasting please visit our website:  
[castawayforecasting.com/xero](https://castawayforecasting.com/xero)





## Why you don't need another add-on app. And neither do your clients!

There are an eye-watering 700 plus apps in the Xero marketplace. And hands up, we're one of them. So when it comes to choosing which apps you need in your accounting practice and advising your clients too, there's a lot of choice. Too much choice for most of us...



@connectably

**Lucy Whittington, Co-Founder, Connectably**

Lucy Whittington has been a Xero user since 2007 when she was part of the original UK launch team. She's run her own marketing & website business for 13 years and is now Co-Founder of Connectably - simple connected software that puts CRM, email, quotes and payments in one Xero add-on app for small service businesses. She's a Mum (twice), Author (twice), and lives at the seaside (which she always mentions).

**W**e've called this problem "double overwhelm" - when you're overwhelmed by all the 'things' you need to do to make your business work - marketing, sales, getting paid, the actual work itself - coupled with the overwhelm of what software to choose to 'help'.

### The Jenga app stack

It's easy to end up with an extensive app collection, a Jenga-like 'stack' of apps. The Jenga analogy is an uncomfortably realistic one too. Which app can you take out or add without the whole thing falling over?

It's not that you set out to have quite so many apps but... now you just do. And the problem is that not all of them are talking to each other, perhaps you're having to 're-key' information from one to another. Or the way they integrate with Xero is only one direction (in-, but not

back out) so they're not keeping you entirely up to date with what's happening in your business. Some only you have access to, some the whole team do, but there's a lot to keep track of. So we're recommending you take a breather. Stop. Rethink.

### Step away from the apps

I appreciate it may seem odd that I'm saying this as co-founder of an add-on app, but my advice would be, for now, to take a step back until you've worked out what you really need.

Apps should be there to help you work better. If an app is saving you or your team more time than it takes to manage it, or adding value - allowing you to sell services you wouldn't be able to without it - then it's probably a keeper. But if it isn't, or adds complexity, then it should go.

Systems are the processes, the 'how to's'. Systems are not the software you have. If you've not sat down for a while (or ever) with a pile of post-its or a whiteboard (or both) and worked out the 'systems' in your business then now's as good a time as any. You'll naturally know your bottlenecks as a business, and you also know where you'd like to 'run faster'. Start there.

### Draw a map

Map out how you want things to work in your business, and then when you're really clear on the simplest flow of actions and outcomes, review your software and apps. If there are 'extra steps' you don't need, it might be time to choose different software or ask a better question of it - how can we make this simpler?

How many steps are in your marketing process? Do you play email tennis setting up calls and



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appointments? What about how you send out proposals or get paid? These are key processes to map and spot extra steps you might not need, or overlaps between apps.

If you're having to work the way an app works and not the way YOU want to work then you may well be using the wrong app. With all the choice you have, it's unlikely you'll have to stick with what you're using now if it's overcomplicating how you want to work.

**Systems first, software second**

"Systems first, software second" should always be how you think about your own apps and those you recommend too.

Trying to 'crowbar' in a way of working because 'that's how the software does it' is never the best place to start. Work out why and what you want to get done THEN look for add-on apps and software to solve those problems.

**But new apps are exciting!**

We know new apps are exciting.

We've built one ourselves (and we're very excited!) but we never have conversations about how great our software is. Instead we always have conversations about "where are your bottlenecks?" or "where are you wasting time? Where are you 'manually' doing something you're pretty sure can be automated? Do you spend your evenings doing 'catch up' when you'd rather not be working?" Those are all systems questions. And we always have those before we even think about app talk. Because depending on the answers, our app - or any app - may not solve the problem(s).

Just like shopping in the sales - it's not a bargain if you didn't need it in the first place. Which is also our attitude to apps. And not just because my co-founder is a Yorkshireman and would never consider a frivolous purchase, ever!

**A good place to start**

Work out what's most important to you in your business and get the best app doing that for you. Ideally if you can fix multiple bottlenecks

with one app, then that's even better.

If you're not sure, or want a simple place to start - here are the Top 3 'problems' we see all the time in small service businesses:

- **Losing leads** - striking that balance of 'keeping them interested' without hassling for a meeting but still getting the meeting!
- **Getting quotes & proposals done easily** - ideally straight after a meeting when everything's fresh
- **Getting paid quickly** - actual cash in the bank not just invoices out

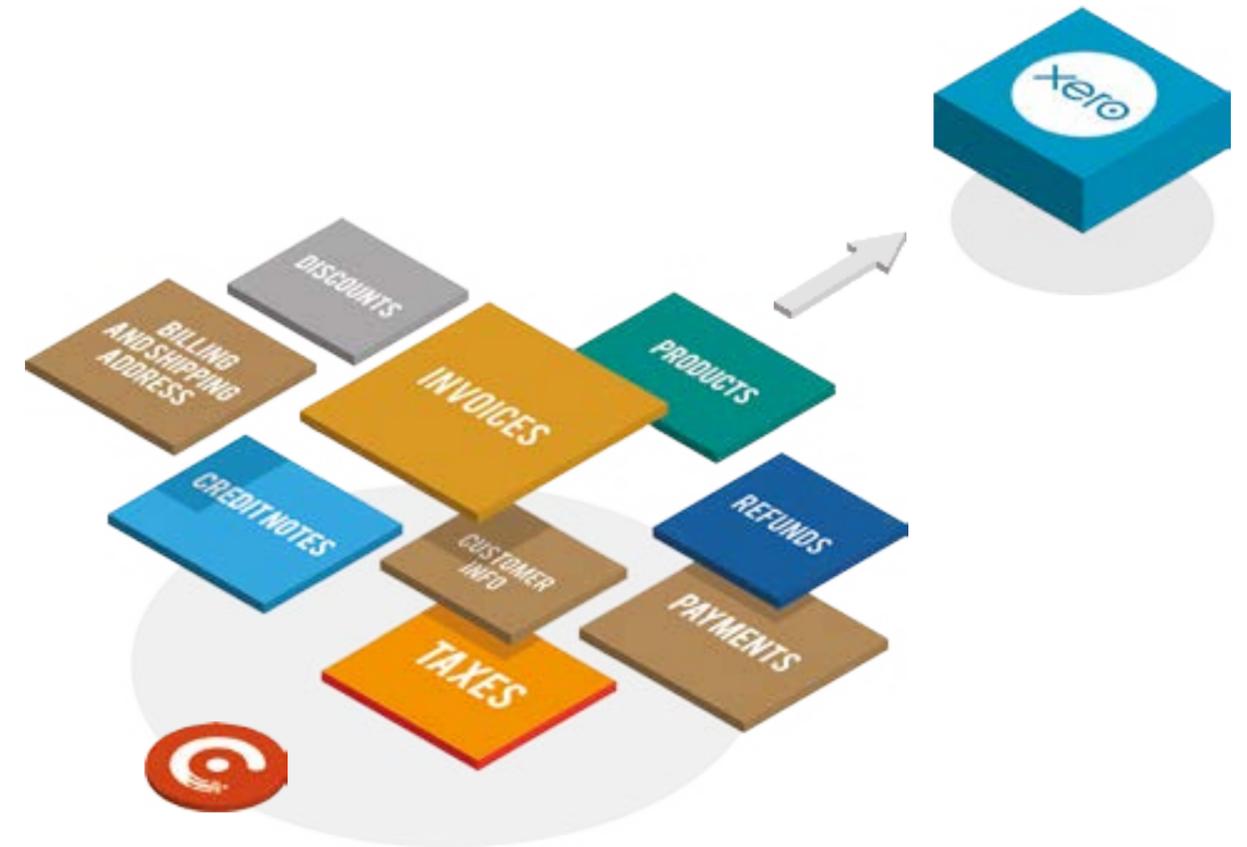
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# Why is software integration essential?

In today's business world, software is key, see how you can make the most of it...

**S**oftware integration is nowadays the inevitable path forward for any software provider. Job and asset management software Loc8 has made integrations one of its major selling points, offering its users multiple integration options, including Xero. The integration with Xero was one of the first projects to be implemented by the Loc8 Team. To have effective and profitable operations, service businesses can no longer treat field work, assets life cycles and financials as three separate entities. The data gathered from those three aspects of a business have to be correlated in real-time in order to draw an accurate diagnostic of the health and sustainability of the company's operations.

## Be one step ahead of the game!

Loc8 was launched in 2011, with the ambition to provide a cloud-based asset and maintenance management platform for large and small businesses. Initially, the focus was centered around providing operational solutions for some larger businesses in the mining & resources and facilities management industries.

Once these solutions were delivered, we decided to focus on the opportunities to help smaller businesses with a trades focus and new customers were soon brought

on across different industries where field service management was a requirement. This includes many tradies and businesses working in the trades space as well as fire safety & prevention, security, construction and facilities maintenance.

Many smaller trades-based businesses were still running on pen and paper. Some had implemented financial systems such as Xero, however, no field service solution was in place. Loc8's Sales and Support teams regularly encountered this common scenario and business owners regularly communicated their frustrations with keeping accurate records and linking work carried out in the field to associated financial records. In some cases, payment wasn't reconciled until three months after completion of the work. The obvious answer to this was to provide a solution that offered a seamless integration with Xero.

Many software vendors, such as Xero and Loc8, specialise and provide value in one particular area. For Xero, that's cloud-based financial software. It's easy to access and use for a wide group of businesses. Likewise, Loc8 provides class-leading asset, maintenance and field service software. System integration between the two platforms offers users all of the features of both systems.

In a real-world scenario, a Loc8 Lite or Pro user would go about completing their normal field service activities which include dispatching job details to field-based workers, who then complete the work whilst simultaneously capturing key data points such as time, inventory and cost. Users record data via the Loc8 mobile app for smartphones and when the job is completed, they capture the customer's signature on the spot.

The data updates the main Loc8 system back in the office in real-time and the user can then simply select the job in question and initiate the Xero integration in Loc8. In one click, all of the necessary financial data is posted into the users Xero system for immediate invoicing. Records are stored for as long as they are needed in Loc8 as another point of reference.

In summary, Loc8 makes it easy for small service businesses to streamline their operations by providing easy to use desktop and mobile applications that link with other cloud-based systems to share important data.

## How can you choose the right app for your service business?

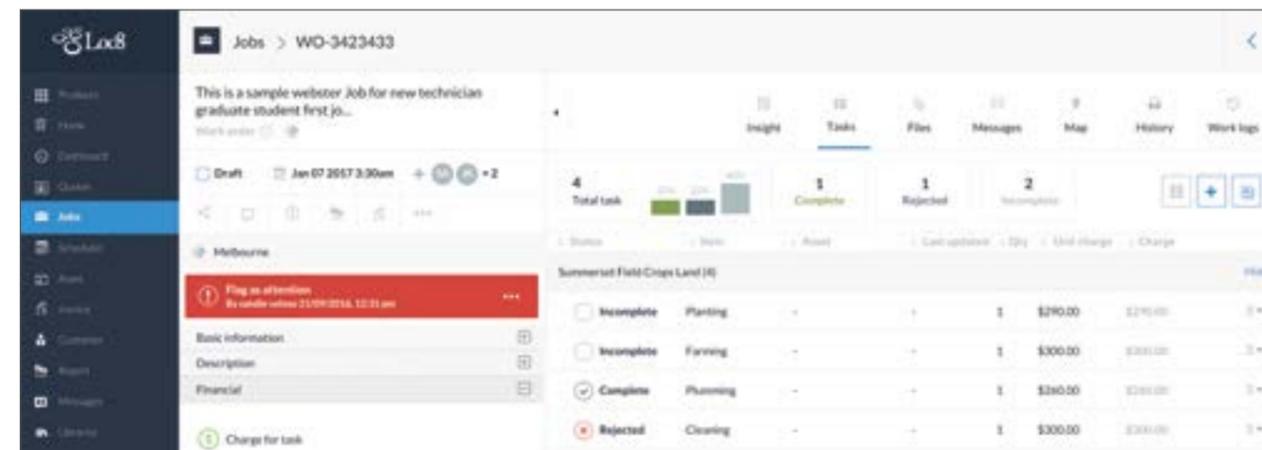
Selecting the right application comes down to identifying your business' requirements as well as the operational proficiency of the app. As expressed above, the ability



@loc8com

Neil Cameron, Director of Growth, Loc8

Having joined the business back in 2012, Neil has a very good understanding of the SaaS industry and more specifically the Asset Management and Field Service sectors. With Neil's major point of focus being the exponential growth of Loc8, third-party integrations have been essential for him and the entire Loc8 Team in order to provide customers with a tailored and scalable solution.



to integrate with other cloud-based applications should be a priority.

When using a platform like Loc8 for instance, our users can create and generate quotes straight from the app. Once approved, the quote is converted straight into a work order. Having this automated process in place allows service business owners and their workers to increase productivity, as there is no need for them to be focusing as much on the administrative side of things.

The same applies to invoices. After a job is complete, technicians can generate invoices to their clients on the spot, thanks to the Xero integration, thus allowing the business to be paid on time and to maintain a healthy cash flow. With this data being automatically added to the system, it then becomes very straightforward to create insightful reports.

The two examples above are essentially relevant to small businesses, however, once your business grows it's important

that the tools you use also grow with you. Being able to keep the same systems allows a much safer and quicker growth. It reduces the chances of data being lost or hacked and there is no need to allocate time to train your staff to use a new application.

## Small businesses don't always stay small!

Expanding on that last comment, it is true that not all small service business owners think about the potential expansion of their operations straight from the start. Their main focus is often to keep the business afloat and to get more customers on board.

However, Loc8 has partnered with many businesses that have outgrown their previous systems. It is important for business owners to think about the implications of growing quickly and the importance of being able to scale accordingly. Identifying a system that will support such a journey should be high on the list of considerations. In the long run, it will reduce the

chance of a growing business wasting quite a considerable amount of time and money.

Beyond the scalability factor, usability is another important component. Loc8 is designed to be an out of the box, ready to use solution, with intuitive features that don't require intensive training. For small service businesses, it is even more important to be able to use an application on the go. Most don't have the time or resources to spend weeks implementing new solutions for their operations. It's often the main reason why some businesses don't feel ready to move away from paper. We created Loc8, and particularly the Lite edition, with that aspect in mind; therefore, making our product a very good option for people with limited time and resources.

FIND OUT MORE...

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# 11 Questions to ask when choosing an Online Payroll Provider



Joanna Cruickshank is General Manager of Sales for CloudPayroll

CloudPayroll is a standalone payroll system suitable for 1 – 200+ employees. Joanna is passionate in helping people get the best payroll solution for their organisation.



**P**ayroll can be the largest expense item on your clients' profit and loss statement and mistakes could potentially cost your clients considerable sums of money. It is extremely important your clients are equipped with the payroll service best suited to their needs. Online, cloud-based payroll will be hugely beneficial to your clients. There are many cloud-based connected app payroll partners to choose from in Australia and New Zealand. As your clients' trusted advisor, do ensure you are advising on the one to best suit their specific needs. Below are some helpful questions to assist evaluating cloud-based payroll solutions and determine the strongest fit for your client(s).

## 1) What payroll services do you provide?

A list of requirements could include:

- Single Touch Payroll enabled (AU): STP report automatically sent to ATO after each pay event.
- Employee portal/self-service: can employees see their payslips, payment summaries, apply for leave, update personal details, etc.?
- Leave management: can employees apply for leave online and calculate their leave balances for a future date?
- Leave approving: is there access to all information needed to make an informed decision when approving leave, i.e. leave calendar, total leave balances, employee projected leave balances for future dates,

ensuring enough leave to cover the request.

- Top-up Tool (NZ): to ensure employer obligations under the minimum wage requirements are met, especially relevant for the rural sector.
- HR Document control: is there an ability to upload and securely store employee documents?
- Reports: can you view reports online, export them to excel, PDF and print? At a minimum, reports available should include statutory information, e.g. payroll variation to compare last pay run with the current, payroll tax report (AU), tax activity statement (AU), leave liability to include total value of outstanding leave balances.
- Superannuation management: ability to pay superannuation to employee super funds (AU) or KiwiSaver (NZ).

## 2) Do you offer a demonstration or trial of your services?

Is there a free trial and/or personalised demonstration of the services offered to assist in evaluation?

## 3) What is your pricing structure?

The majority of cloud-based online payroll providers charge fees based on the number of employees. Check the charges and look for value. Make sure that there are no hidden costs not disclosed during preliminarily trials or demonstrations. Will your client be charged for all active employees in the payroll system or only those

that are being paid in the current pay run?

## 4) How does onboarding work and how easy is it to migrate from an existing system?

The correct set up of your payroll is paramount. Some payroll providers set up everything for you to ensure payroll is set up correctly and in accordance with legislation, as well as offer personal training and ongoing support. Others provide access and leave set up to you, with options to review online resources if you need help. When migrating from an existing system look for a vendor that provides full set up implemented for you, including a parallel pay run rather than work this out yourself. Check what your client will be charged for an implementation or onboarding fee?

## 5) How secure is your service and where are the data centres?

Review the security and privacy policy of the provider, check if they offer 2FA-factor authentication and check where the data is being held; onshore or offshore?

## 6) What ongoing help desk support do you offer?

Enquire what ongoing support will be available to you and your client. Is the support free and offered by phone, email or both? What happens outside of business hours should you need help?

## 7) Do you have the ability for employees to donate to charities via payroll giving, and receive immediate tax credits (NZ) and make payments to third parties, for example, salary packaging, handling of novated car leasing or employee loans, etc.?

Can third party payments be made directly as part of the bank file or paid back to the business to consolidate and then easily report? Can employee loans, if applicable, be managed easily, i.e. repayments of an agreed amount deducted with the employee knowing the loan balance after each repayment?

## 8) How long has the payroll provider been providing services?

How long has the payroll service been operating? Was it previously known by a different name and did it start as a desktop product or has

it always been cloud-based? Read client testimonials.

## 9) Can different access rights be set for those involved in running the payroll?

Payroll handles some of the most sensitive and confidential business information. Ranging from personal details and remuneration packages, to deductions being made from an employee's pay by government departments and agencies. Can those involved in the payroll process, including leave approvers, be given different security access rights?

## 10) How does the service integrate with Xero?

Does the payroll system seamlessly integrate with Xero or do you need to export out and then import into Xero? How long has the integration

been established for?

## 11) Can the service scale up to meet growing business needs?

Payroll software needs to adapt to your clients' organisation changes. Is it easily adaptable to allow for growth or reduction in employee numbers over a period of time? Evaluate how this is treated, if employees can still access their portal/self-service, are there charges for this, how many employees can you have active in the payroll solution.

### FIND OUT MORE...

Visit our website at [cloudpayroll.com.au](http://cloudpayroll.com.au)



Check out [approvalmax.com](http://approvalmax.com)

## 6 Productivity Killers in Accounting

### PRODUCTIVITY KILLER THREE:

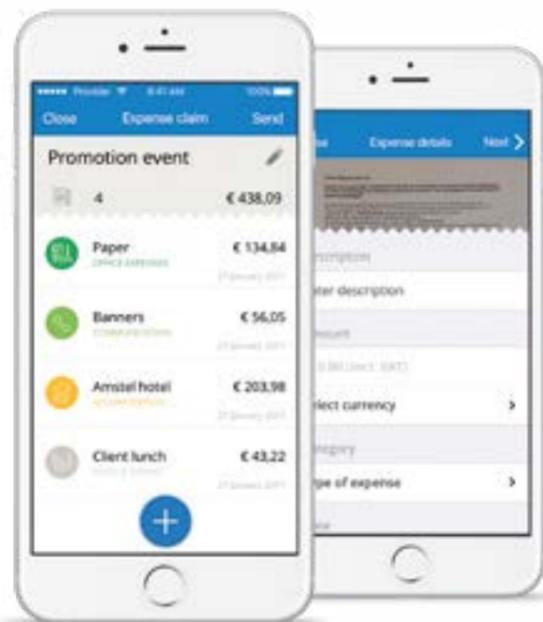
Retroactive entry of organisational spending details

# Maximising automation to boost your bottom line

Accountants today are calling for seamless and future proofed systems that eliminate wasted time and mundane processes. Automated processes and workflows are the future to growing practices as accountants look to develop their advisory offering to increase revenue...

**C**apturing and processing invoices for bookkeeping is a small task in the bigger picture of accounting today. Yet, it's enough to make any accountant groan and slow down procedures. It is manual, mundane, paper and time intensive, ultimately affecting the profit margin on client services.

Additionally, the government's Making Tax Digital (MTD) initiative, GDPR and the increasing demand for real-time data from clients is ramping up the need for quicker, seamless and future proofed technology systems.



Combined with constantly evolving technology and stiff competition from more innovative practices, manual processes are no longer a viable option. What's more, the role of the accountant is shifting towards advisory services as they look to grow their client base while still satisfying their existing clients.

The accountant of today needs tools and effective workflows that will transform their services and unlock time for growth and new revenue.

## The future is now, can you keep up?

Not too long ago, accounting and bookkeeping started with combing through bags of receipts and capturing the data. The digital age has eased processes and practices are now slowly embracing automated tax services. Wolters Kluwer UK & Ireland Managing Director TAA, Claire Carter believes that 80% of accounting tasks will be automated by 2020.

According to survey research conducted by Wolters Kluwer in conjunction with Kelley Market Research, cloud technology is the key to reaching a firm's full potential. Firms that reported growth of over 10% in revenue year on year are moving to the cloud-based model at a higher



@wolterskluweruk

Wendy Rowe is the Head of Commercial at Wolters Kluwer, Tax & Accounting. She is responsible for the strategy and direction of the tax and accounting software suite and has over 20 years' experience within the industry. Wendy is a chartered tax advisor, understanding the need for supporting practices becoming digital.

Wendy has an MBA in Strategy from Henley Management College, holds a Chartered Tax Adviser (CTA) qualification and is a member of the Association of Taxation Technicians (ATT).

percentage, with 36% saying they have already implemented.

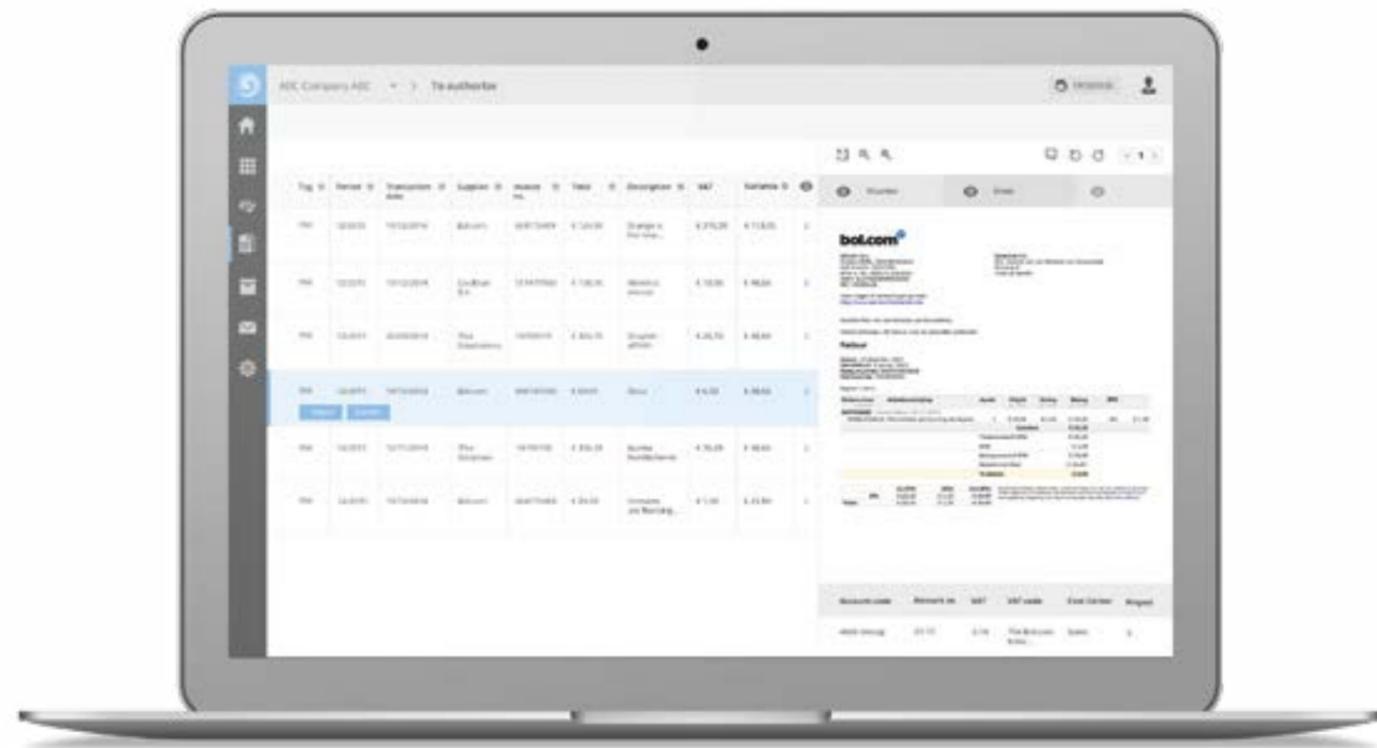
With the growing availability of digital data from HMRC, compliance will become more commoditised, driving the need for the accountant to step into an advisory role. Digitalisation is here to stay, meaning accountants need to transform their manual processes to digital.

## Staying competitive in the cloud

Building enhanced client relationships and business advisory services will mean unlocking significant time automating low value tasks. One option is to consider online tools to save time and increase efficiency.

Wolters Kluwer has developed a tool designed to make data capture easier and immediate. Basecone is an online cloud tool which enables users to capture and upload invoices and other accounting documents directly to their bookkeeping software via an internet browser or the Basecone Spenser app for mobile devices.

Once manual data entry and paper-based services are eliminated, the accountant can capture, upload, review, approve documents and submit expenses in real-time. Basecone gives you full control,



instant access to data and can be integrated with Xero, Twinfield and Exact.

"Basecone Flux enables me to approve all my purchase invoices and be productive in places and periods where I would otherwise not have been, like when I am travelling to meetings," says Robert Searle, Finance Director at Tangmere Airfield Nurseries.

Delayed invoice processing and coding can slow down bookkeeping with unnecessary time spent sourcing documents or actions from relevant people.

Basecone utilises Optical Character Recognition (OCR) to read scanned documents, recognise elements and automatically code them based on previous actions. Basecone does this in real-time with no delay. This unique capability allows you to access your information instantaneously within your accounting system.

Documents can be immediately sent through a controlled workflow to be checked and approved by the client or yourself.

"We have been continually impressed by Basecone's ability

to innovate and improve the efficiency of our relationship with our clients and how we handle their documents securely," says Jamie Allen, Managing Partner at 4PointZero. They have been automating data capturing since 2014 using Basecone and have seen a significant increase in efficiency and productivity.

## Working in an instant access environment

Manually storing invoices and receipts for the required seven-year period is expensive, risky and restricting when there is a move towards digital record keeping. Moving forward, practices will need to support multiple accounting packages as well as incoming data from the government. Not only that, but they will have to ensure GDPR compliance, meet MTD requirements and, ideally, have access to information in a single place, all while on the move.

Instant access is key to delivering big data analysis and financial advice in real-time. Basecone can automatically store and archive all documents in the cloud, safely and securely and exceeding legal requirements for data retention of seven years. The instant search and

recall functions drill straight down to an image of a source document.

IT Director at Old Mill, James Gifford says, "Basecone has saved me hours of time reviewing and approving invoices. It means I can deal with them from my phone from wherever I am without having to be sat at my desk."

Practice efficiency and growth is a tale as old as time for any business. Automated tools are changing the landscape. With compliance work contributing between 0 and 3% of revenue growth, advisory services are predicted to produce between 30 and 40% in the next few years. Unlocking that potential, practices will need to save significant time and maximise on automating low value tasks. The future growth of your practice lies in automated solutions like Basecone.

## TRY IT FOR YOURSELF...

Sign up for a 14-day free trial with Basecone:  
[basecone.co.uk](http://basecone.co.uk)



# Reduce the hidden costs of managing expense claims for your clients and your practice

Whether you're an accountant, business owner, or an employee needing to be reimbursed, managing expenses claims is often a manual, painful process. But the new Xero Expenses is here to fix that. Tightly integrated with Xero accounting, Xero Expenses is an automated, powerful, mobile solution that reduces data entry and streamlines the entire expense claims process...

**W**ith everyone working from one platform, you and your clients can easily access the same, up-to-date information and collaborate from anywhere. This means less time processing expense claims and more time delivering valuable advice and support to your clients.

### A better way to manage expenses

Staying on top of expense claims is important to businesses and their employees, but sorting through stacks of receipts or managing spreadsheets is not a good use of

your or your team's valuable time.

Staff that work away from the office or entertain clients often have to pay for petrol, food, and other expenses out of their own pocket. This gets expensive, so prompt reimbursement is understandably important.

However, keeping hold of each receipt until the end of the trip and then sitting down to do all the data entry in one go is painful, and will often be left until the last minute. This leaves employees frustrated and businesses with a poor gauge

of cash flow and an incomplete picture of how money is being spent.

To address this, Xero has been working closely with small businesses and accounting partners to understand their key pain points and what they really need. From business owners and their advisors, through to admin staff and employees, Xero have reimagined the expense claims process to be a more simple, insightful and beautiful experience for everyone.

Xero Expenses is designed for a

# CASTAWAY

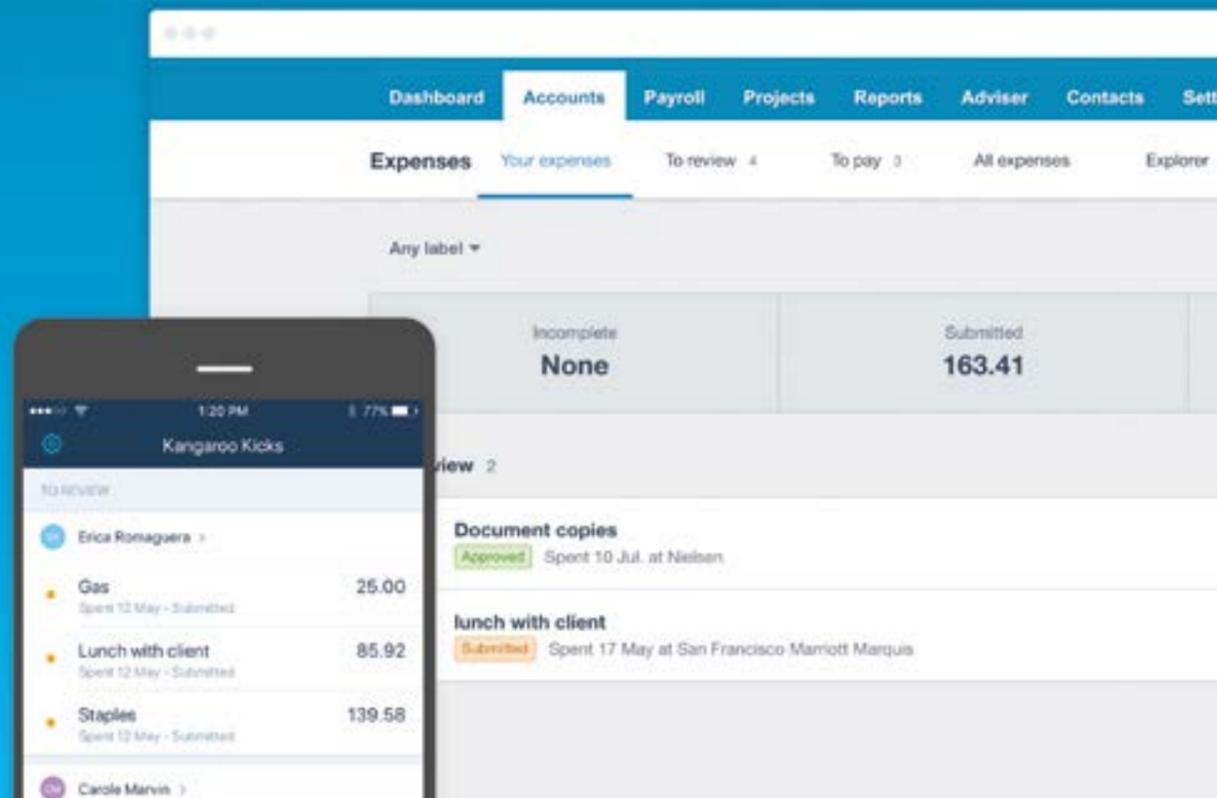
3-way business modelling

with Xero integration



## The Heart of Your Business Advisory Practice

Castaway is the most powerful reporting and business modelling solution that integrates with Xero. It's your ideal tool for reporting, budgeting, forecasting, analysing KPI's and actuals, modelling scenarios and managing consolidations.



Find out more at [castawayforecasting.com/xero](https://castawayforecasting.com/xero)

modern, more mobile business. It makes the expense claims process less time consuming and more accurate, while providing advisors with the control and analytics needed to deliver superior insights and advice to their clients.

**Delivering more value to Xero partners and small businesses**

The new Xero Expenses offers a more cost-effective way to manage expense claims through:

- **Greater efficiency:** automated workflows make submitting expense claims easier and reduces manual data entry. With the collaborative features Xero Expenses offers, business owners, employees and advisors can work together easily from the same platform.
- **Better visibility:** stay informed with a quick, up-to-date view of claims so you always know where your expenses and cash flow stand and what requires attention.
- **Enable growth:** with the ability to track expense categories, businesses and advisors can monitor and understand expense patterns. With access to data at any time, from anywhere, it's easy to manage cash flow, and make quick, informed decisions.



**FIND OUT MORE...**

To find out how you can get your business started on Xero Expenses visit: [xero.com/expenses](https://xero.com/expenses)

**The key benefits of Xero Expenses**

- **Submit expenses with a photo:** submit expenses on the move with your iOS or Android device. Just take a picture of the receipt and Xero Expenses will automatically convert the amount, purchase date, supplier and account fields into text.
- **Manage everything in Xero:** with just one login for Xero and Xero Expenses you can be sure you're not double-handling information. Real-time tracking helps you and your team manage expenses from anywhere.
- **Eliminate hidden costs:** reduce data entry and streamline the entire expenses process from submitting them to reconciling transactions in Xero.
- **Stay in control:** set access levels for staff and choose who can view, submit, approve or pay expenses claims. By being able to control user access you can keep sensitive information private and simplify the expense claims process.



Xero platform you'll be able to get valuable insights and make informed decisions about your practice.

Submit expenses on your clients' behalf, or set permissions and categories to make it easier for them to fill in their expenses themselves. Making submitting expenses easier will mean clients will do it more often, which in turn means better visibility into the business's cash position.

**Get rewards**

Earn partner points and reach the next partner status level faster. You can get points when you actively use Xero Expenses in your practice, and for every client subscribed to Xero Expenses.

Don't take our word for it...

For Tony Bennett, an accountant and Xero Partner for Bellingham Wallace Ltd, using Xero Expenses has made life a whole lot easier for him and his clients.

*"We highly recommend Xero Expenses as smart, easy to use modern technology," he says. "It has automated the expense claim process for our business. It speeds up the submission process and makes a seamless flow through to payment."*

**Xero Expenses for accounting and bookkeeping partners**

As an added benefit of being a Xero partner, Xero Expenses is free for accountants and bookkeepers within their Xero Practice org. And because Xero Expenses works seamlessly with the rest of the

**Powerful, easy-to-use features**

- Auto receipt scanning
- Integrated accounting
- Insights and analytics
- Multi-currency processing
- iOS and Android apps
- Push notifications
- Flexible user permissions
- Assign expenses to projects
- Multiple line items
- Tracking categories
- Expense labelling

- **Easier collaboration:** Xero Expenses works seamlessly with the rest of Xero to keep all your financial data on the same platform. With one Xero login, business owners, employees and advisors can complete the task they need to do and collaborate from anywhere, at any time.

# Get paid on time, every time

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Take control of your payments and collect automatically on the invoice due date, whether recurring or ad-hoc.



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ADD-ON



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**Automatic invoice reconciliation**



**One click bank reconciliation**



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# IntegraPay

Business payments made simple.

# Approval Donkey: Doing the Donkey Work for Approvals!

They say there is a lot in a name and we often get asked why we called our app Approval Donkey...

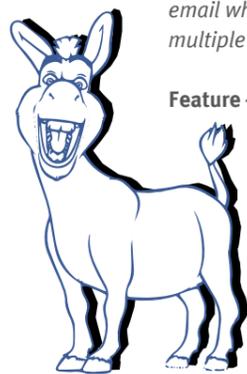
**T**he first part is easy; as a piece of software we focus on one task, i.e. Approvals. However, there are a few underlying reasons why we named our app after a Donkey - an often maligned yet very humble, loyal animal.

If we look up the definition of Donkey Work, we get the following:

*Donkey Work – tedious, repetitious work; drudgery*  
-Dictionary.com

In summary, Approval Donkey takes care of the Donkey Work associated with completing approvals for your business. Here's how:

**Donkey Work #1**  
*Managing loads of responses via email when you need approval from multiple people.*



**Feature – Group Approvals**  
Approval Donkey is an affordable solution that allows non-technical users to easily create approval workflows (or Panels). Create as many Panels as you need, for whatever purpose you require, with as many members as you like from the one account.

Automatically track who has and hasn't responded to a request with full visibility so you can easily see where things have stalled.

Approvers can respond via email or the Approval Donkey dashboard, meaning Approvers don't have to login to Xero at all.

**Donkey Work #2**  
*When you need approval requests to move along a chain of different people or departments as they are approved.*

**Feature – Multi-Step Approvals**  
Easily create workflows with the appropriate steps and approvers you require. Requests mapped to a multi-step approval workflow will automatically come into Approval Donkey from Xero and go through the sequence you have set up. This means approvers in the latter steps only receive an approval request when all the approvers in the preceding step have approved their part.

Approval Donkey automatically keeps things moving along so you don't have to, massively cutting down email trails and endless chasing of approvers.

**Donkey Work #3**  
*When you need approval from a group all with equal approval rights and anyone within the group can take on the task.*

**Feature – Required Responses**  
As an example, a business may have four people in its admin team who can all approve purchases up to a certain amount but only one person from the team is required to

make the approval. With Approval Donkey, you can set the number of required responses to change a requests status to approved or declined. So, in this example, you would set the number of 'Required Responses' to one, meaning only one person out of the group of four is required to approve or decline the request.

Anyone from the Panel can respond to the Required Response level you set, meaning the workload can be shared and whoever is available can keep things moving.

**Donkey Work #4**  
*Having to send out endless reminders to approvers to 1) tell them they have an approval and 2) remind them to respond when they haven't.*

**Feature - Automated Notifications**  
When transactions are 'Submitted for Approval' in Xero, all request notifications are automatically sent out by Approval Donkey. This means no one in your business has to lift a finger to let anyone know they have an approval to review.

Automated reminders are sent out to any approvers that have not responded within a time of your choice, with any un-actioned requests being moved to overdue so a workflow owner can easily identify where blockages are occurring.

Notifications and consolidated



@ApprovalDonkey

**Ben Palmer, Founder, Approval Donkey**

Ben has over 20 years' experience in technology projects in the Banking, eHealth, Fitness and Aviation industries and is the original founder of Approval Donkey, an online approval workflow tool fully integrated with Xero. In his spare time Ben likes to stay fit and healthy so he can keep up with his 3 school age children and maintain his weekend warrior pursuits.

reporting can be switched on/off to a timing of your choice, to keep you informed along the way without clogging up your inbox.

**Donkey Work #5**  
*Searching through tens or even hundreds of transactions that have nothing to do with you so you can find those that are greater than a certain amount, or have specific tracking IDs to approve.*

**Feature - Conditional Field Mapping**  
Approval Donkey brings in all the fields from any Invoices, Bills, Purchases and Credit Notes you have entered and Submitted for Approval in Xero. This includes Tracking ID's, Amounts and Reference numbers, etc.

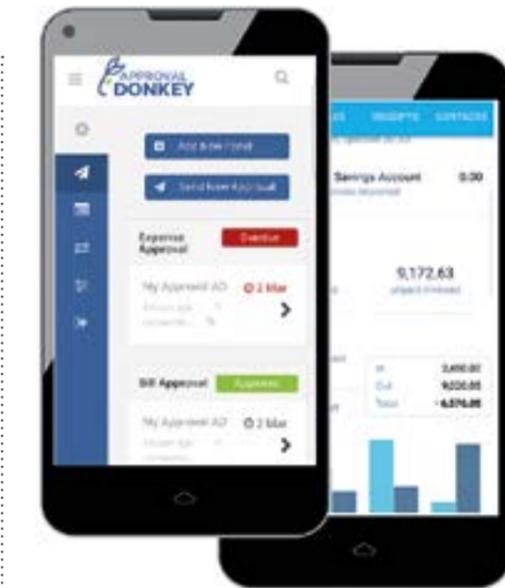
With Approval Donkey's mapping matrix, you can set conditions against specific fields to map to specific Panels for approval. You can even use '+And' conditions to get really specific. For example, for all transactions with the Tracking ID 'Operations' +And an amount greater than 10,000 go to the

'Manager' Panel for approval. This means you no longer have to send a myriad of emails to different approvers based on what each transaction is. It also means approvers only ever receive what they are supposed to, saving loads of time and frustration looking at transactions that have nothing to do with them.

**Donkey Work #6**  
*When your business is still using email for more general approval, decision and sign-off requirements outside of Xero.*

**Feature – Integration with Email and Zapier**  
Consolidate any general requests you may send via email into a single application with Approval Donkey. Each Panel (approval workflow) you create auto generates a unique Panel Email address. Use this email address to turn any email into a robust approval workflow with all the aforementioned characteristics.

Zapier enables you to connect over 1,000 different apps to further



automate your business, including Online Forms (Wufoo), Messaging (Slack) and Project Management (Trello) apps that can feed directly into an Approval Donkey request or status update.

## FIND OUT MORE...

To find out more visit:  
[approvaldonkey.com](http://approvaldonkey.com)

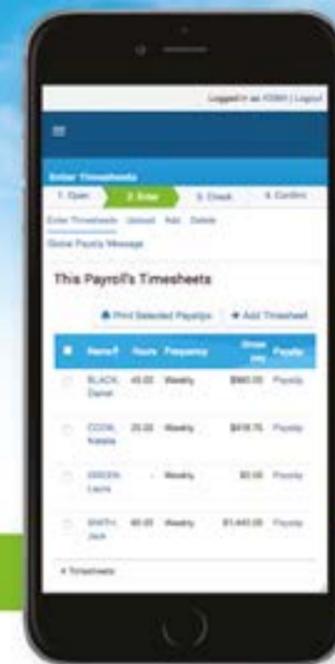
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# Why ACCOUNTEX ticks all the boxes... and more!

By Ian Moss, Editor of Accounting Insight News

The **ACCOUNTEX** brand is on a roll. As Europe's largest conference and expo for the accounting and finance profession, its numbers continue to tick upwards. Whichever way you look at it.

Exhibitors flock to London's ExCeL in May for the annual two-day extravaganza – there were 230 top industry vendors this year. (In fact one of the 2018 highlights was Xero's super-groovy stand!)

Visitor numbers are soaring, with 7,600 rocking up in 2018. That's a 40 per cent hike in three years. So who would bet against another spike in 2019? The show will take place 1-2 May at ExCeL, London.

And all that's before you arrive at the top-notch speaker programme of accounting thought leaders. From MTD experts to marketing maestros, it offers more than 250 CPD-approved cutting-



## ACCOUNTEX

NATIONAL ACCOUNTANCY EXHIBITION & CONFERENCE 2019

1-2 MAY 2019 ExCeL | LONDON

edge seminar sessions.

But **ACCOUNTEX** is also an institution with innovation and imagination.

New to the Diversified Communications portfolio is **ACCOUNTEX Summit North**, a one-day conference that launched in Manchester last year and which proved such a



hit that it returns on 10 September 2019.

Then there's **Accounting Insight News**, a refreshing new online platform that's busy all-year-round, curating cool accounting-related content from the **ACCOUNTEX** HQ in Brighton.

Here's some hard evidence of the success story we're witnessing with **ACCOUNTEX**. In terms of visitor knowledge levels, here's how visitors to ExCeL in 2018 likes to describe themselves as:

- Tech savvy – 42 per cent.
- Tech curious – 49 per cent.
- Tech Cautious – 10 per cent.

From the visitor point of view, Nicola Donnelly, from MEND Accounting in Liverpool, sums it up: "It was an amazing experience. Being a sole practitioner, I learn mostly by reading articles online. So I was impressed by being able to speak to multiple software providers and their customers at **ACCOUNTEX**."

She adds: "I still can't believe I got all this CPD, access to speak to all these software providers, network

An amazing 45 per cent of exhibitors were brand new to the show, which demonstrates the strong growth of businesses in the profession.

ZOE LACEY-COOPER,  
EVENT DIRECTOR



"And, of course, we are thrilled about the 8.5 per cent increase in visitors after investing in a social media marketing campaign, as well as launching **Accounting Insight News** to attract new interest and millennials to the show.

"All eyes are now on 2019, where we aim to build on the relationships established with new supporters such as ICAEW and HMRC. As well our established relationships with ACCA, CIMA and media partners AccountingWEB

"Next year we plan to have

even more new speakers; we want to look at the profession internationally; and we'd like to see a growth of the BAMA awards (British Accounting Marketing Awards).

"Our focus will remain on MTD with the clock running down to April 2020 and strengthening Accountex's global and UK brand.

"And last but not least, we'll also hold another visitor and exhibitor advisory board to see what the profession wants from the show in 2019."

See you next year! ■

with hundreds of accountants and bookkeepers at many different stages in their journeys. I'll definitely be at the next **ACCOUNTEX**. My only issue will be how I can split myself in 10 so I see all the speakers."

Zoe Lacey-Cooper, event director, says: "This was the second year of **ACCOUNTEX** being under the control of Diversified Communications and we are delighted to have notched up a second year of growth in terms of visitors, exhibitors and speakers.

"An amazing 45 per cent of exhibitors were brand new to the show, which demonstrates the strong growth of businesses in the profession.



For further information, visit our websites:

[www.accountex.co.uk](http://www.accountex.co.uk) | [www.accountexsummitnorth.co.uk](http://www.accountexsummitnorth.co.uk) | [www.accountinginsightnews.co.uk](http://www.accountinginsightnews.co.uk)

# Bank rules in Xero

The streamlined bank reconciliation process in Xero, with the combination of the bank imports and the auto match function, really does speed up and simplify the whole bank reconciliation process. Indeed, there is something very satisfying about opening up the bank reconciliation page and seeing green and lots of 'OK' buttons, as you know you will be able to reconcile items very quickly. Bank rules can speed up bank reconciliations even further but many people are unaware they exist and how easy they are to set up...

## When to use Bank Rules

Bank rules should be used for regular spend or receive money transactions, or for bank transfers where there are no invoices to support the amount. For example, parking or train travel. If you have a regular monthly invoice, you should enter that as normal and match it against the payment as part of the bank reconciliation. In this case, there is no requirement for bank rules.

There are three types of transactions that bank rules can be created for:

1. Spend money transactions
2. Receive money transactions
3. Transfers of money between accounts.

All are set up in the same way and all can save you time and help ensure a consistent approach each month to the reconciliations.

## So what are the advantages?

The main advantage is time saved – the rules automate the bank reconciliation process even further which saves us time. Another plus is that bank rules also ensure consistency because the same rules

are applied each month, so the transactions are always treated in the same way.

The ability to apply the same bank rule across different bank accounts and credit cards eliminates the need to set it up individually for each account. Ensure you select the target accounts when you set the rule up and the same rule will be applied to all of the selected accounts.

Bank rules also help keep Xero tidy. For example, you do not want a new contact created for each petrol station or taxi firm used. Instead, you can create a rule to be applied to all similar transactions, such as 'petrol' or 'taxis', and this will group them all together.

## How to Create Bank Rules

You can create bank rules from the bank account page, from the bank reconciliation itself and also from the cash coding page in the bank statement. In all cases, the setup of the bank rule is identical – you just need to select whether it is a spend money, receive money or transfer of money transaction first.

The create bank rule screen is split into seven sections, with section



@MHUpdates

Caroline Harridence is a Cloud Accounting Manager at MHA MacIntyre Hudson in their Peterborough office having originally trained with PWC. Caroline regularly advises clients on cloud accounting, is an active member of the firm's cloud strategy team and is also the Eastern Regional Cloud Champion. She is an expert in how cloud accounting can assist clients in day-to-day bookkeeping and also help with their preparation for digital filing required by Making Tax Digital in 2019.

one specifying the conditions of when the rule should be applied. You must have at least one condition for the bank rule but you can add more if needed.

The first line states that the rule will apply either if 'all' or 'any' of the conditions apply. This is an important criteria as 'all' will mean that the rule is applied if all the conditions are matched, whereas 'any' means that the rule is implemented even if only one of the conditions are met, so it is less restrictive.

Next, by selecting 'Any text field' from the first drop-down list, Xero will search the Payee, Description, Reference and Analysis Code fields on the bank statement line and apply the rule if one of the fields meets the condition.

The next drop down has four options as follows:

- All - the rule is applied if all the conditions entered are met
- Any - the rule will be applied if any of the conditions are met
- Contains - the rule suggests statement lines that include the details entered but do not have to be a specific match, so is less restrictive.

## Practice management that integrates with you

Senta is cloud software that gives you CRM, marketing, workflow, email automation, document management & insights. With total customisation and flexible integrations, Senta will help you manage compliance risk, deliver great customer service every time and increase the value of your practice.

Whether you're a single accountant in practice, or a larger firm, Senta really does integrate with you.

### Great value per-user pricing

- No long contracts
- No record limits
- Free upgrades for life
- Your clients use it free

### Available on all devices

Senta is cloud-based and available on desktop PCs, laptops, tablets & mobiles.

To use Senta you just need a browser and an internet connection.

### Integrates with you

You shouldn't be told how to run *your* practice. With our powerful and customisable workflow engine at its core, Senta will help you work just the way you want to.

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- Equals - the rule is applied if the bank statement lines match exactly

The next section relates to the supplier name and this can be entered during the reconciliation, the payee or a new or existing contact. If you want to group all common items together rather than have a new supplier for each entry, you can create a new contact to group them. For example, you could create a new contact called 'train travel'.

The third section is where you want

to allocate fixed value line items and is commonly left blank. Section four relates to the allocation of the amount to different nominal codes. Here you must enter a description, account VAT rate and the percentage of the total value to be allocated to that account.

Next, set the reference and then on section six you can set the target bank account that the rule should be applied to. It then gives you the option to apply it to more than one account. This saves you having to set the rule up for each individual account.

The final step is to give the bank rule a title. That is all that is needed – you have now created your bank rule!

Now, when Xero detects the payment to a supplier covered by one of the bank rules, Xero will apply the rule. All you have to do in the bank reconciliation screen is click 'Ok' to confirm and the item is then reconciled.

### Order is important

You can set the order that bank rules are applied from on the bank rules screen. This can be found on the bank accounts page. Here you can drag and drop the rules, so specify the order in which they should be applied, with the more restrictive ones first.

### Summary

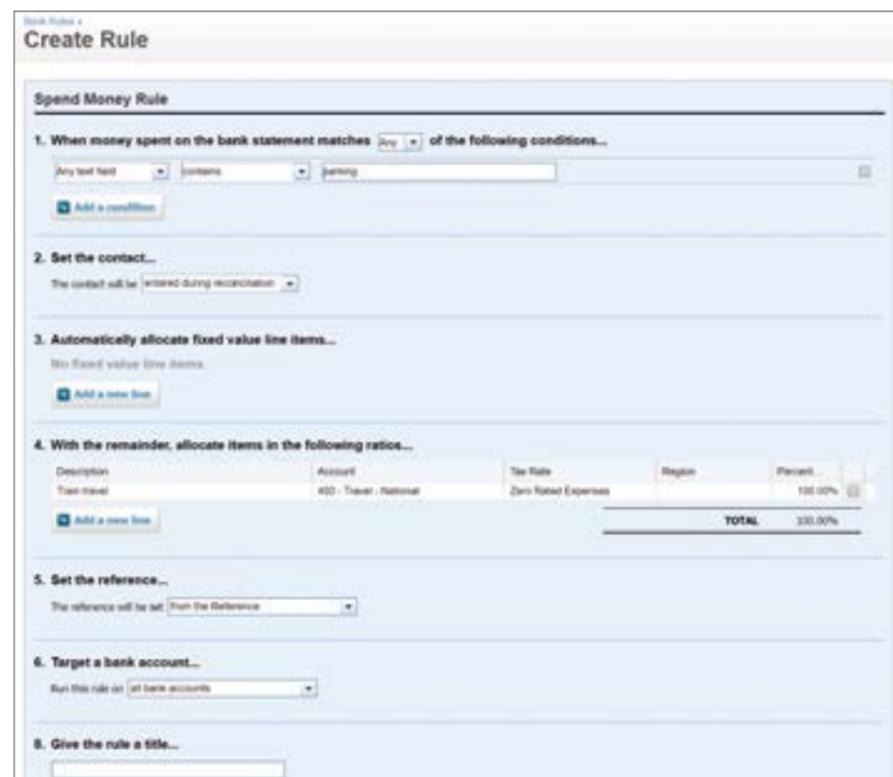
Bank rules are a time saving tool that are well worth setting up. Through taking the time to set up the rules and the conditions at the outset, the bank reconciliation will be much smoother and faster in the future.

## Hints & Tips

There are a few hints and tips to help you make the most from your bank rules and to help ensure they are applied.

- In step one, set the criteria to 'any' rather than 'all', as all would mean that each of the conditions must be met for the rule to be implemented.
- Setting the rule to 'contains' rather than 'equals' will mean that the rule will apply to a wider set of criteria as this is a less restrictive option.
- Xero does not recognise hyphens in conditions, so your bank rule will not be applied if there is a hyphen included.

- In this case, you will need to create two separate conditions for the two elements. For example, if the payee was 'North-Field' you would need to create a condition for a payee containing 'North', and a second one for a payee containing 'Field'.
- Select the 'all bank account' option in step six to apply the rule to all of your bank accounts and maximise the benefits.



Description	Account	Tax Rate	Region	Percent
Train travel	400 - Travel - National	Zero Rated Expenses		100.00%
<b>TOTAL</b>				<b>100.00%</b>



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# Add-ons help you increase profitability and improve cash flow

Gone are the days of working nine-to-five where employees are paid a simple wage and clients are billed based on estimated time. The constant increase in running costs and inflation have made it clear that businesses need to shape up and get with the times if they're going to survive the age of technology...

It is true, most accounting software like Xero have some form of basic timesheet tracking and invoice tracking built-in, and for some this might be enough. However, for other small business owners they see the need for more robust solutions to integrate with their Xero account and here are three reasons why:

## 1) Time Tracking Apps Help Increase Profitability

It's the little things that decrease profit, like employee time theft, an industry term used to describe when an employee is paid for time they did not work either intentionally or by mistake, and can include: time tracking errors, frequent breaks, exaggerated hours, and more. A survey by Software Advice reports that forty-three percent of employees exaggerate hours and the American Payroll Association estimates that the average employee steals four hours and five minutes each week!

Most companies experience some form of time theft and, in most cases, it comes down to poor time tracking and insufficient processes. Time theft is typically small but over a period of time, costs add up. Fortunately, using software to track timesheets improves accuracy, puts the accountability on the employee and reduces clerical errors.

Inaccurate time tracking is more

common than business owners expect and is one of the main reasons for lost revenue. Employees or contractors may not be tracking their time down to the minute, or maybe they're not estimating their hours properly.

By tracking time accurately and analysing past jobs, you're able to ensure your estimates are spot on. You'll also be able to review tracked hours throughout the project to ensure you're on budget. If not, you'll have the ability to renegotiate the project before it's too late. No one likes an invoice they were not expecting!

Apps, like Time Tracker by eBillity, integrate with Xero to extend the functionality. The two-way data sync allows your accounts to work like one, sharing information to help your business track time and expenses more simply.

## 2) Invoice Tracking Apps Improves Business Cash Flow

After providing your customer with a service, you send them their invoice and carry on with your work. A week, two weeks, thirty days pass -- still no payment. With invoice tracking software, you can improve your cash flow by getting paid faster. It's a known fact that the sooner you get an invoice out the door, the sooner you will get paid.

According to the Payment Practices

Barometer Americas 2017, and annual regional report from Atradius, the average payment duration in 2017 was sixty-one days with over ninety-two percent of businesses reporting that they received late payments from their customers. For SMBs, this number can be even higher. A study of Xero users found that about sixty percent of invoices are paid late, and more than a third are at least two weeks late.

If you've been without the income of an invoice for over ninety days, you might consider employing a collections agency. While this may result in a partial or full payment, you'll now have to pay a fee for their services. And even then, there's no guarantee of payment.

Dealing with unpaid or overdue invoices may not be completely unavoidable, but you can improve your position with automation. Apps, like eBillity's Invoice Tracker, sync with Xero accounting and invoices are automatically imported, so in just a few steps you're able to create a sequence of email reminders using their customisable email templates. Set the dates you want your emails to be sent and activate the collection -- it's that simple!

By adding structure to your AR and automating the process you're able to save time, maintain client relationships, and increase the



@eBillity

Joe Daee, V.P. Business Development, eBillity

Joe Daee brings 20 years of experience in software and technology to the eBillity team. He joined in March 2017 with a goal to expand the company's global partnerships and channels into foreign markets -- which we can say he has successfully done -- launching Time Tracker in Australia Pacific, the UK, and Europe. He's a sports fanatic who is always free for a chat over an ice-cold beer.



likelihood of being paid faster.

## 3) Add-ons Provide Invaluable Insights

When you connect add-ons to your accounting software, you gain valuable and detailed insights to key functions within your business. This allows you to make informed decisions that help to increase profitability and improve running costs.

With time tracking apps, you're able to discover where your time goes. The reports show you information like your most productive

employee, and how much time your business has spent on each client. Further analysis will allow you to identify which clients are making -- and costing -- you the most money.

Whereas invoice tracking software tells you the state of your cash flow in real time. With their reporting

you're able to see what's been paid, what's outstanding, and what's actively being collected. You can also easily check your reminders to see which clients have read your emails.

### Getting started is simple...

eBillity provides both timesheet and invoice tracking software that integrates seamlessly with Xero. Start your **free 60-day trial today**. Visit Time Tracker at [ebillity.com](http://ebillity.com) and Invoice Tracker at [invoicetracker.com](http://invoicetracker.com). Use promo code 'XUMAG'.



Check out [approvalmax.com](http://approvalmax.com)

## 6 Productivity Killers in Accounting

### PRODUCTIVITY KILLER FOUR:

Poor provision of information for making decisions on the go

# Hospitable cloud

Case study: how a rural tearoom has embraced cloud tech to effectively manage the business

A tearoom in the rural village on the North Devon coast wouldn't be everyone's natural assumption for the use of cloud tech, but Paula Byers offers a case study on how their integrated cloud solution of Xero, Kounta, iZettle & Deputy enables them to cope with the influx of tourists and their doubled capacity when their garden is open...



**M**arket Street Kitchen is a small but busy tearoom in the little fishing village of Appledore. Sole trade owner, Josie, bought the business in December 2016. Josie took the plunge to move out of London, purchasing this hospitality business in an area that she had visited on holiday frequently as a child.

Establishing roots in the community from the outset was important to her, to prove to the locals that this 'incomer' was here to stay. "Moving from city to village life was a big leap into the unknown. I hadn't run my own business before or lived outside London so it's fair to say everything was new and scary. I had big plans for the business though, including menu changes, rebranding and refurbishment. I can't imagine not living and running my business here now, but if you'd said 5 years ago this is what I'd be doing I would have laughed at you! Change can certainly make or break you." comments Josie.

#### Tech was key

Having worked as COO of a digital

charity relaunching the largest digital platform for volunteering opportunities, and with a social enterprise supporting the next generation of women into STEM, taking up the challenge of owning a tearoom meant that tech was always on the agenda for Josie.

Xero was a natural fit for the bookkeeping and we initially added Kounta, a specialist hospitality cloud point of sale app, with iZettle to manage the in person card payments, and adding Deputy later for staff management, offering a fully integrated system for single point data entry. From our early discussions with Josie, it was clear that she was keen to embrace the latest and most efficient cloud tools to manage her new business.

That said, there were a number of other factors to consider, and resolve, before she could fully embrace the cloud.

#### The challenges

- 1. Broadband connectivity** – this was essential to resolve at the outset, and something I approach with caution in a rural



@LimeCloudLtd / @LimePaula

**Paula Byers**, Founder & Director, LimeCloud

She has started and run various businesses for more than 26 years, increasingly working with tech & business systems over the last 15 years. Moving into the cloud 6 years ago precipitated the re-brand to LimeCloud in 2016. A STEM Ambassador, Business Mentor, local Chamber of Commerce Vice President & Chair of DigitalIND; she is passionate about supporting business and not-for-profits to develop, using creative and innovative cloud tech.



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area. However, a little research confirmed we were able to solve this relatively easily with an upgraded service to the property.

**2. Staff acceptance** – with a diverse age range in staff, from college students to retirees, this could have been a tricky issue. Josie approached it with confidence; talking with the staff prior to the implementation, explaining that full training would be given and supporting them after the implementation. I believe the attitude of management embracing adoption of cloud tools from the outset is absolutely key to how staff see such a fundamental change.

**3. Upskilling herself** – purchasing a business in an industry in which you have no prior experience is challenging enough; learning new tech on top of that adds to the pressure you are under as a new business owner. Whilst Josie was fully IT literate, learning the tools to manage the business would still take time out of her busy week when she was already learning the ropes in a new industry. Fortunately, she had a good core team around her and, utilising the support of us as cloud integrators to set up and configure her system along with providing training, has worked well.

#### Not all plain sailing

Initially, getting everything in place from the start was relatively easy. The business operates 7 days a week so, as the purchase takeover was midday of normal trading, iZettle was setup for card sales with the first afternoon sales continuing to be collated manually to ensure no interruption to customers during a busy lunch service. With the setup and configuration of the cloud tools completed off-site in advance, hardware was installed on-site and staff completed an hour-long training session prior to opening the next day.

So, whilst everything looked to be up and running, the hard work then began behind the scenes bringing Josie up to speed on business and bookkeeping management.



Along with menu development, rebranding and complete refurbishment of the premises, Josie certainly had a lot to do. This meant that some things were slower than others, and getting a little behind with the paperwork in the first summer didn't help when footfall increased for the tourist season and she underestimated just how busy she would be.

#### Feeling in control

However, getting on top of the paperwork to fully understand business expenses and cost out menus has been key to making it profitable. Forward investment is dependent on having access to financial reports in Xero, and the ability to drill down into sales information in Kounta has been vital to understand at a granular level which menu items work and hourly sales.

The addition of Deputy last year for staff scheduling enabled more efficient control of rotas. This also offers the opportunity for staff to manage their shifts, with sickness absence notified and covered through the app and holiday management.

‘Cloud-based apps are now just part of our day-to-day business.’ says Josie. ‘At first I thought too much tech would be a barrier for staff and customers, so I implemented things slowly; I was concerned it would take away from the ‘country tearoom’ appeal. But after getting confident at taking orders at tables with iPads, it's now a talking point and means we can spend more time with customers, not running back and forth with bits of paper. Adoption was quick and staff were

up for learning new approaches. I now have all the data I could possibly need to move forward with the business.’

#### A note for accommodation providers

Whilst not relevant to Market Street Kitchen as they don't take overnight guests, Preno can be added to this app stack for accommodation bookings. The beauty of this is that food and drink sales can be easily transferred to room bookings to be checked out together at the end of guest stays.

#### Ongoing process of review

The upgrade from Kounta's Xero integration this year and their additional functionality offers further opportunities to streamline the business. Integrated payroll processing is an option in the future too.

Josie looks so at home at Market Street Kitchen, it is hard to imagine she was anywhere else. We are pleased to say it has been transformed compared to when she took over. Her passion for using local produce to develop an imaginative menu of core favourites and ever changing specials makes a difference. Oh, and we couldn't finish without mentioning the amazing cake selection – if you ever find yourself in the area, we can vouch that it's well worth a visit. Heaven in Devon!

#### FIND OUT MORE...

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# Q&A

Richard Francis, Founder & CEO,  
Spotlight Reporting

**XU:** I am joined by one of the early adopters and long-term supporters of XU Magazine; Spotlight Reporting's own Founder and CEO, Richard Francis. Richard, it is great to be able to speak to you today about all things Spotlight Reporting. Could you start by giving us a brief overview of your story and what led you to found Spotlight Reporting?

**RF:** I had a long career as a business advisor and chartered accountant, first for a big firm then in the UK (we lived in London for 4 years), before founding my own business consultancy back in New Zealand. All along, I focused on entrepreneurial clients and also my own side projects and initiatives.

The emphasis in our business was always on creating an impact beyond our modest scale, which led to very early involvement with Xero. As the first accounting partner, we've really worked closely with Xero from the very beginning of the Rod Drury/Hamish Edwards dream. Xero made it easier for us to go 'full cloud' and more nimble as advisors - but crucially there was a 'gap' that I saw and that led to the founding of Spotlight Reporting. With Xero rightly focused on beautiful accounting, my advisory background really demanded more - visualisation, forecasting, consolidation, action plans, advice and strategy - and so Spotlight Reporting was born.

**XU:** It's amazing to hear your journey and how it has brought you to be the CEO and Founder of such an exciting company. Are you able to tell our readers more about Spotlight Reporting and how it can help impact their businesses?

**RF:** We work with thousands of accountants and CFO's to empower and fuel their conversations with clients and stakeholders - and grow fees and customer satisfaction. Our reports, forecasts and dashboards are fast, effective and illuminating - a great foundation for sharing insight, asking questions and providing

meaningful and proactive advice. Just the sort of work proactive accountants crave but often struggle to deliver well or at scale. We take the pain away and add multiple opportunities to kick open the door to advisory services, new revenue and better client outcomes.

It's not just about the software for us. Because our team has some very experienced accountant-advisors on board - and a range of us have also come from software industry peer companies such as Xero, Receipt Bank, Deputy, etc. - we can truly work alongside our partners and understand the challenges. Our advice, resources and training/support consistently get 'best in class' ratings, because we do genuinely 'get it' rather than just sell and move on as others do.

**XU:** It's clear that just being a compliance Accountant in 2018 isn't enough. One of your tag lines is 'Spotlight Reporting helps you, from service provider to trusted advisor'. How do you help deliver this?

**RF:** The software (empowering tools) is one pillar; our customer success and training teams (empowering support) are the second pillar; and the third pillar is via our Education, webinar, Transform! Advisory Playbook, accreditation and other contributions to the advisory movement (empowering advice).

**XU:** How important is it to educate Spotlight Reporting's new and existing partners on being a trusted advisor and how are you doing this?

**RF:** We have boots on the ground for this - our excellent and experienced Customer Success Team - as well as 24/7 coverage by Training & Support. We do dozens of public and bespoke webinars and training sessions every month and also share widely via blogs, our Transform book and whitepapers; such as those around Cashflow Services, KPI's and the Perfect Advisory firm. We also speak at many conferences and collaborate with great coaches like

The Gap and others.

**XU:** Understanding Cash Flow and Forecasting is always important. How does Spotlight Reporting make this clear for Xero Users?

**RF:** We're working with Xero to leverage the messaging around Cashflow, but it's great to see our Forecasting tool being chosen as 'best of breed' by big, global firms as well as many progressive Xero firms around the world. Recent releases such as Dynamic Rules, Loan Amortisation and Report Cover Designs have cemented this as a fast-growth tool.

I'm personally passionate and outspoken about the fact that accountants don't do enough cashflow forecasting and budgeting - I think it's a huge gap and a huge opportunity for both advisors and their clients. Our Cash Is King white-paper goes into this in more detail and can be downloaded here: [bit.ly/2veEKff](http://bit.ly/2veEKff)

**XU:** How do you help Xero Users present this information to their clients in a way that's easy to interpret for use within their business?

**RF:** The accountants are key to this, as I think great businesses need great guides. We're "by accountants, for accountants", which is a different emphasis than some. CFO's within groups, franchises and not-for-profits also love us, as we make them look good to their stakeholders and save them truckloads of time. I think too that our front-line experience of delivering Spotlight sessions and actual advice to clients over the years means that we know what works and how to visualise and explain actionable advice in an easy way. We're not faking it till we make it.

**XU:** It's been great to see your involvement with webinars. How has this helped you to educate Xero Users about the benefits that Spotlight Reporting can bring to their advisory



business? Also, what's the next exciting webinar to watch out for?

**RF:** We have a few webinars coming up in all territories, often in conjunction with others. The best place to find out more is to check our social channels as well as our website. Education and discussion never stop!

**XU:** I know you personally travel to put on Spotlight Reporting events around the world. How does this help you connect with Spotlight Reporting customers and how has this made Spotlight Reporting develop as a company?

**RF:** One year I did 55 flights - which just about killed me - so I'm thrilled that my great team take a lot of the load on now. With nearly 50 staff, you'll be seeing Spotlight team members all over the world representing the brand, and I'm personally proud of the quality of our team and their commitment to the industry. We do the hard yards always, getting face-to-face and developing relationships, whether it be supporting Xero and progressive accountants in Cape Town, Hong Kong, Queenstown, Hobart or Toronto.

**XU:** You have been integrated with Xero for quite some time now. How has this helped the development of Spotlight Reporting?

**RF:** Xero was of course our first integration and we added WorkflowMax at the same time too. Alongside all of the support over the years both for and from Xero, this has proven to be an incredibly popular integration. Julie and me of course also had Xero Workpapers acquired in 2012 and spent some time 'inside the tent', which helped cement some key relationships, as others on the team have as well.

As we move into our 8th year, it's incredibly gratifying to still have our work recognised with a Xero App Partner of the Year nomination at Xerocon South. Having won

Emerging in 2013 and App Partner of the Year in 2015 and 2016, we're hoping to go one step further this year :)

**XU:** Following on from that, what extra value does Spotlight Reporting add to Xero Users?

**RF:** Xero of course is a great way to produce accounts, management reports and other core functionality. But in many cases - maybe 20% of a client base - the opportunity exists to really take the data and the conversation to the next level. Our action plans, KPI's, cashflow waterfall page, consolidations and cashflow forecasts are just 5 examples of other avenues for insight, decision-making and great advisor/customer interactions. Xero unlocks the door; Spotlight kicks it open for the great work accountants, bookkeepers and CFO's could and should be doing.

**XU:** Spotlight Reporting is helping Xero Users around the world. What challenges have you faced as an international company? How has your global reach helped Spotlight Reporting develop into the great tool that is it today?

**RF:** International companies mean a dispersed workforce, lots of travel, different market approaches and challenges and a lot of late nights! Having said that, you learn a lot from new territories, adapting to local needs and cultural differences and having team members in places such as Newcastle, Kettering, San Francisco, Christchurch, Brisbane and Perth. I would hate to be just locally focused - in this day and age you have to look global in my view.

**XU:** Congratulations on the release of your book this year. I know this has been a personal goal of yours for a little while now. The book is called "Transform". Can you give us some insight into the book and how it might help Xero Users?

**RF:** I decided to create a short and snappy, but highly usable, 'playbook' that accountants could easily absorb, write notes on, highlight at the beach, share internally and adapt as needed. It was a first step to sharing my own advisory services experience from inside a big firm, from creating my own boutique firm and also holding a mirror up to some of the best Spotlight firms too. We've had a great response and will be re-printing and sharing more widely soon.

**XU:** Are there any new features or releases you can tell us about that Xero Users can expect over the next 12 months?

**RF:** Phew, we're releasing every 6 weeks or so something pretty special. Lots of Forecasting updates, Report Covers has just shipped, Account Groupings is close, Multi is being beefed up for seriously large groups - and we have some other cool stuff a bit under wraps. Given how frequently we get copied, we can't give those competitors a head start now!

What is great is the level of customer feedback we get that flows into our Product Roadmaps. Our own team as well have plenty of experience and ideas across all 4 of our products. We've got great software enhancements and extensions to keep us going for a long time - so watch this space or revisit us if you haven't had a look for a while!

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Wendy Williams, Business Services Manager, SPI Industrial, NZ

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# How to: Match incoming Bills with Purchase Orders

When you review incoming invoices for correctness, you need to make sure that what you are asked to pay is what you agreed to pay. That's when Matching of Bills with the corresponding Purchase Orders comes into play...

**S**pending management in a nutshell: making sure that the spending is necessary, is happening with the right suppliers and for the right price; truly an essential part of safeguarding an organisation's financial health. And it starts on the demand side, meaning all Purchase Orders must be raised, reviewed, and approved in an organised, well-defined manner – before they enter your finance system and get sent to the suppliers.

But it is equally important that all incoming invoices are matched with their corresponding Purchase Orders which, of course, need to carry the seal of approval.

There are good reasons for having this matching functionality as well as an efficient approval process in place for all invoices/Bills. In an ideal world, all your Bills have a perfect 1:1 match with your approved Purchase Orders. In reality, there will always be invoices that differ from the Purchase Orders you agreed to.

For example, maybe your supplier decided on partial billing for just a part of the whole Purchase Order because they didn't deliver all the goods or services you ordered. Maybe it's the other way round and your supplier sends you a single invoice that covers all goods or

services you've ordered via multiple Purchase Orders – making their job easier but leaving you to figure out exactly which Purchase Orders you are being billed for.

Or maybe you use Purchase Orders not for line-by-line ordering but as a kind of spending budget (bucket) for each supplier so that you're controlling how much business all in all you're placing with this particular vendor while not focusing on the details of every single order.

Whatever it is, you need to make sure that there are no unintended, or even fraudulent, statements in any of your incoming invoices.

To support you every step of the way and make your job considerably easier, the ApprovalMax Bill approval workflows provide a sophisticated functionality called Bill to PO Matching.

## How it works

As part of the approval process, ApprovalMax picks up all Bills in Xero that are Waiting for Approval and routes them to the designated Approvers. In the first approval step, Bills can be matched with the respective Purchase Orders. This Bill to PO Matching can take place in the following three scenarios.



@ApprovalMax

**Konstantin Bredyuk**, CEO and Co-Founder, **ApprovalMax**

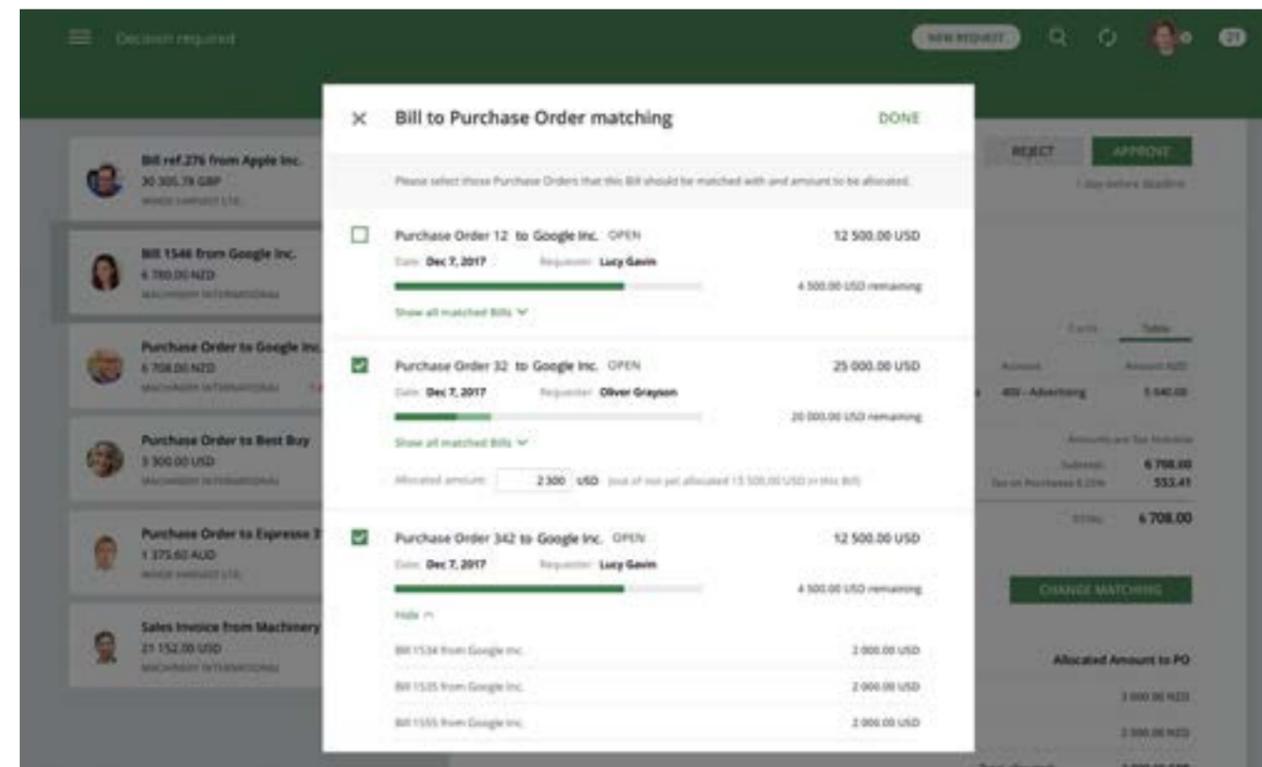
As an experienced BPM expert, Konstantin has a strong focus on design and development of Business Applications which support Human Workflows. He is Co-Founder and CEO at ApprovalMax, known for simple and easy to configure approval workflows in finance.

Please note that the description below provides an overview of both the GA functionality and that of the upcoming ApprovalMax's product release.

The first scenario covers manual matching of Bills and POs, for which Bills must have the status "Not Fully Billed". ApprovalMax presents you with a list of all Purchase Orders and filters them based on parameters that should be the same in both the Purchase Orders and Bills you're about to match, for now these are Supplier and Currency.

The second scenario works for Bills that have perfect match with previously approved Purchase Orders. Using a set of configurable matching parameters (such as Supplier, Total Amount, Currency, Quantity, Price, etc.), a single Bill can be automatically matched with a single Purchase Order, and even get selected for Automatic Approval to save time.

The third scenario is perfect for those cases when Purchase Orders are used as a placeholder/budget for controlling the total spend with a particular supplier: when a Bill is matched with a Purchase Order, the remaining balance for the particular Purchase Order (which stands for a certain budget amount) will be calculated – taking into account any Bills that have previously



Above: Manual Bill to Purchase Order Matching

been allocated to this very same Purchase Order. If the current Bill amount exceeds the remaining balance of the Purchase Order (i.e. budget), it can be mapped to multiple other Purchase Orders in the system (any new Purchase Orders that are not yet in the

system would of course have to pass the appropriate review and approval process first).

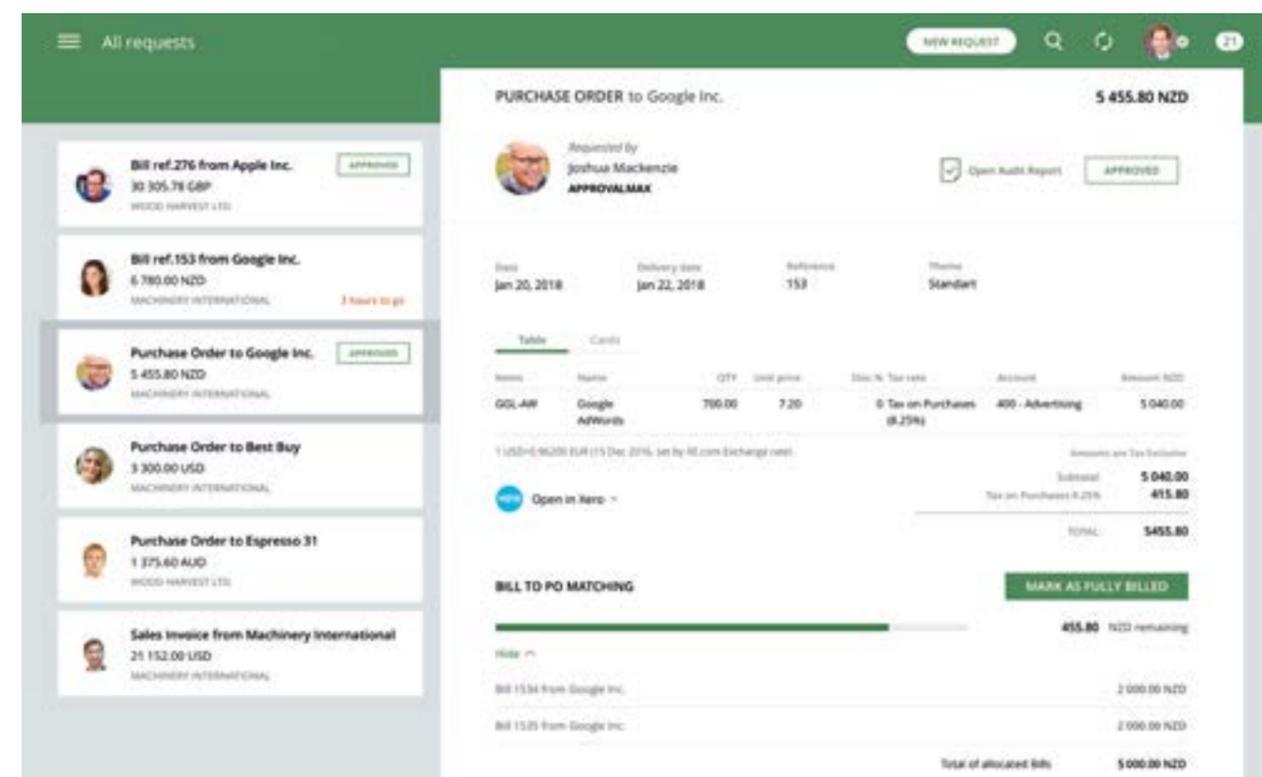
This kind of Purchase Order can be marked automatically as Fully Billed in Xero when they've been matched with the corresponding Bills, are fully approved, and the Purchase

Order balance/budget has been completely consumed.

**FIND OUT MORE...**

To find out more visit:  
→ [approvalmax.com](https://approvalmax.com)

Below: Using Purchase Order as Budget



# Re-thinking accounts payable automation delivers 90% productivity gain

## New opportunities of invoice capture and approvals automation

Neil Robertson explains why a simple but fundamental change of thinking revolutionises the entire accounts payable function for every business...

**T**he automation of finance processes has been taking place over the past 40 years, taking small incremental steps to improve financial management. In terms of the accounts payable process, automation is now delivering the biggest leap forward in decades, both for businesses and for the accounting practices that provide outsourced services to them.

The technology is here, it's driving efficiency and it's a must-have for businesses of all shapes and sizes; in particular accounting practices. Those who embrace it will enjoy increased productivity of up to 90% whilst delivering improved real time financial management to their clients; those who don't will soon find themselves struggling against their new competitors.

This huge leap in increased productivity is driven by 2 fundamental changes that have already taken place. The first is the growing trend whereby businesses send their sales invoices via email as a PDF (this already accounts for over 70% of all invoices). The second is the utilisation of AI and machine learning to fully automate and process them.

The implications are groundbreaking. For small, growing businesses, it reduces the overhead costs of the accounts payable function by up to 90%,

permanently. For accounting practices and bookkeepers, it increases their outsourcing resources capacity by a factor of 6-9 times, delivering an unparalleled competitive advantage.

Another compelling benefit for all accountants is the delivery of a fully auditable compliance best practice process for the entire AP function, including the forthcoming "Making Tax Digital" legislation.

It provides the opportunity for every accounting practice to re-engage with their clients via a unique proposition – saving a huge amount of time and money whilst receiving real time information on your cash requirements and suppliers as a bi-product.

It becomes a small step for accounting practices to offer to remove the headache of the entire accounts payable function from their clients, significantly reducing their client's cost by doing so. For MD's of small businesses, this is a very compelling proposition.

### The revolution created by an automated invoice approvals process

It is surprising that a considerable proportion of accounting practices remain unaware of the accounts payable approval processes that take place prior to them receiving an approved invoice for posting and

payment. It is even more surprising that many also fail to see the huge opportunity this presents, to improve their client's processes and gain access to larger organisations and the increased revenue opportunities they represent.

All it requires is a change in thinking to achieve a much more efficient way of working, because effective automation is about changing the way we work, not automating how we work today.

The goal becomes to capture every invoice on arrival. For emailed PDF invoices, simply ask the supplier to change the email address they send it to plus implement the discipline of capturing, bundling and scanning the diminishing paper invoices daily. The result is the immediate removal of all paper, together with the considerable and now pointless labour required to deal with it from first touch through to filling. Removing the paper at source also delivers instant real time information to everyone that needs to know, whether that is cash requirements reporting or improved supplier account management of critical suppliers.

As 60% to 80% of all invoices are always coded to the same department, this adds the ability to 'default' this information at both the invoice header and also for invoice line items. The result is that most invoices are delivered directly to the



@compleatP2P

Neil Robertson is CEO of Compleat Software

A 39-year veteran of the financial software marketplace, Neil has a long track record of building disruptive start-ups into successful businesses, including his time as CEO EMEA of Great Plains where he built the business outside of the USA from 1995 - 2001. Compleat is no exception and is perhaps the most disruptive of them all.



approver without intervention by the finance team.

The approval process can now take place from any connected device, with automated reminders to keep the wheels turning. On final approval, the invoice is automatically posted to the underlying accounting software, again, without touch.

Proposed payment reports simplify the payment cycle and maintain a full audit trail of payment approvals.

The result is a simple, seamless process, with a complete audit trail from invoice receipt through to approvals, posting and supplier

payments, delivering real time financial visibility and productivity savings of up to 90%.

### A philosophical shift

The biggest change is undoubtedly philosophical. Accountants have been wedded to paper invoices for as long as double entry bookkeeping has existed and this all too often remains true today. We all live in a digitally interconnected world for just about everything and it is really time for the accounting community to fully leverage software like ours and Xero's, and follow suit.

The simple act of capturing all

invoices on receipt delivers a far more robust process. It delivers far better protection against fraud, stops duplicate invoice payments, enables faster approval processes to avoid late payments of critical suppliers that disrupt supply, provides far better invoice query management, real time reporting to manage cash flow and 100% auditable compliant best practice.

Commercially, it is a very compelling proposition for every MD. The common arguments of concerns over accuracy, reliability and delivering a quantifiable ROI sound more like excuses than a defensible justification against change.

As with all major changes delivered through technology, they require a diligent review. But if that review confirms that all of the benefits are both real and achievable at a justifiable cost, change becomes inevitable.

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# Automating tax codes for bureau businesses

Winner: KeyPay - Software Supplier of the Year - Global Payroll Association 2018



@keypayUK

Phil Bernie, Co-Founder, KeyPay

Phil co-founded KeyPay, a cloud-based payroll and workforce management tool new to the UK in 2018. Since its launch in Australia in 2012, KeyPay now serves over 70,000 Australian businesses and processes over \$10 billion a year in employee payments. Phil is passionate about keeping business processes simple and removing the unnecessary stressors in the payroll and workforce world.

When I co-founded KeyPay, my sole purpose was to change the way businesses worked and paid. I wanted to understand the frustrations payroll managers had and develop automated solutions to make life easier. We started this in Australia and have grown to serve over 80k businesses and over 180k employees. Now in the UK, we've built a product with the very same intentions - solving pain points for bureau payroll managers through automation and technology...

## Simplifying tax codes

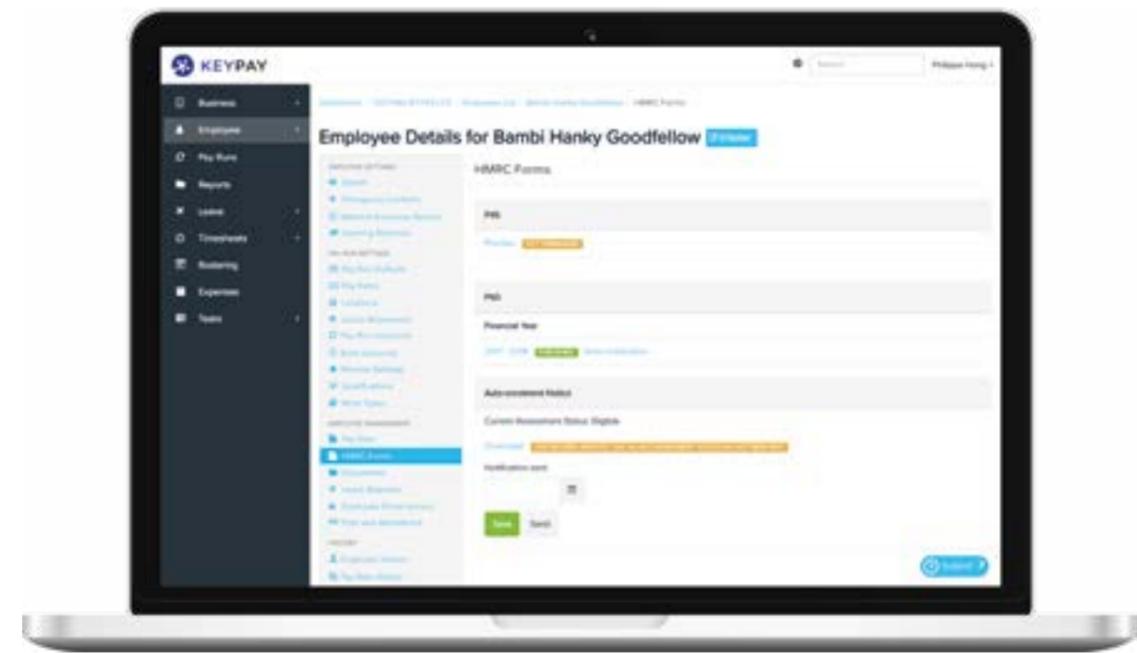
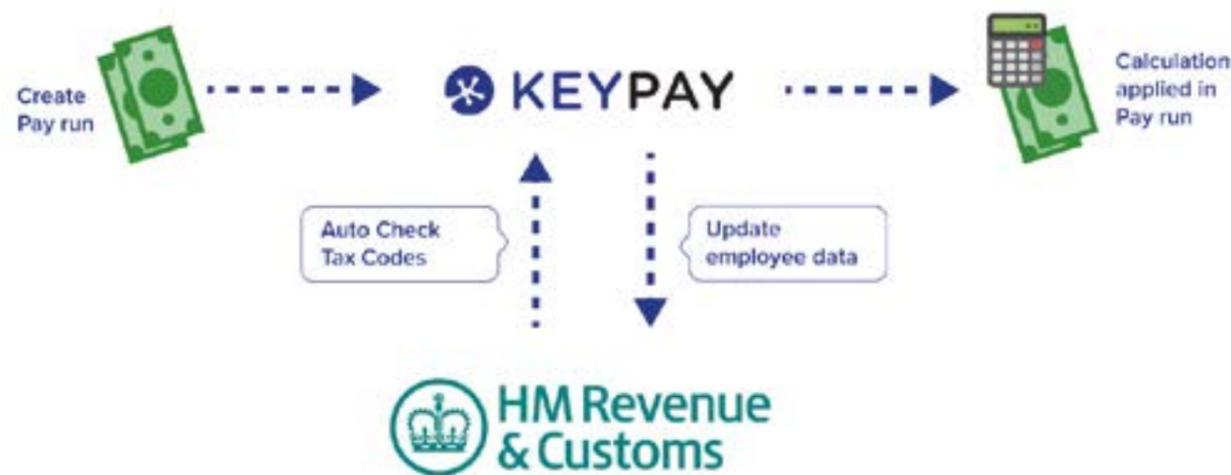
One of the big pain points for UK payroll managers is managing the ever-changing employee tax codes. HMRC collects tax from 41 million workers and, on average, 8 million have either been underpaid or overpaid in the tax year. This method does not cater to workers that have changing circumstances throughout the year and then run the risk of facing a hefty tax bill, or waiting until year end to recoup

overpayments.

The current process involves HMRC sending an email to the employer advising their employee's tax code has been changed, adding an extra step in the payroll process. Alternatively, the payroll manager can check the employee tax code on HMRC if they are running a pay. Whilst the option is there for manually checking, it's an extra manual step in the payroll process, and one that is often either

forgotten or that can easily result in mistakes in manual data entry. The only other option then is to update as required upon receiving the email from HMRC, then calculate any changes per employee, based on date and previous pay. All round nightmare for the bureau payroll manager.

Whilst many payroll platforms have spoken about automating tax code updates, KeyPay has automated the process through its API integration



with HMRC. Bureau businesses are now able to automatically update employee tax codes, as well as their effective dates directly from HMRC for each employee. This is done each time the pay run is created, removing another manual step for payroll managers.

Tax code updates are just one of

many automation features built to save bureau businesses time and ease the workload. Innovation isn't about keeping up-to-date with legislative changes, it's about removing the headaches experienced by payroll managers. We see the future of payroll being focused on technology automation. For payroll managers, the work

should actually be focused on 'managing' the payroll rather than chasing up timesheets and manually adjusting data.

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# Out with the old, in with the new

AdvanceTrack examine some of the new models of practice that are developing – and how tech facilitates this change. AdvanceTrack asked Kevin Reed to look at those that have launched from the ground-up, and provides food for thought for traditional practices that are reticent about evolving their offering...

**G**eneral practices run by Baby Boomers cannot continue as they have done. For starters, the sands of time continue to pass unhindered. Second, the world in which a practice's accounting services are provided moves at a seemingly faster pace than the grains themselves.

But before we hurtle headlong into the future, it is important to remember that the more things change, the more they stay the same. In reality, the types of service that clients want from their accountants – while varied – is not dramatically or radically different from what they would have required 20 or 40 years ago.

"There will always be people who want to have basic tax returns done and dusted," explains ACCA head of advisory Glenn Collins.

And existing, successful, practices have always offered a form of value-added business advisory service. These are the types of deeper business advice oft-referenced as what practices should aspire towards, moving beyond just compliance.

Perhaps what has changed is the sheer reliance on accountants by the small business and owner-managed business communities.

The erosion of the bank network and disappearance of the 'manager', along with dissipated

trust in financial services post-2008, has seen the pendulum swing very much in favour of accounting professionals for broader advice. Numerous surveys around the globe point to accountants as the most trusted adviser, usually scoring way ahead of banks, financial planners and lawyers.

### What are the options then, for practices?

We have seen much growth in the accounting franchise. TaxAssist is billing £37m in UK fee income, with more than 200 sites in the UK. Its blue and yellow livery is clear to see on high streets and other locations up and down the country.

Then there are the volume providers. A great example of this model is Mazuma. Based in Bridgend, Cardiff, Sophie Hughes and Lucy Cohen launched the business in 2007, defying the economic downturn to build a highly market-friendly bookkeeping and tax return business. Its distinctive 'purple envelope' service sees clients post receipts and paperwork monthly.

Finally, you have Crunch, an online accounting provider that does more. Crunch enables clients to take up insurance and investment products as well – all through its website. You can even choose a mortgage.

But who else has pushed into the

online accounting arena? That's right, the biggest accounting firms.

Deloitte's Propel offers start-ups and small businesses a bookkeeping, accounting and tax service. An expert at Propel will also send clients monthly management reports – all at a pre-agreed fixed fee. A live dashboard taking data from feeds illustrates the business' performance in real-time.

While a 'separate' business to that of Deloitte, there is of course the option to refer across where clients require services outside of the online offering.

There are even variations on the online accounting theme among the big firms themselves – and not all have worked out. For example, Grant Thornton's Geniac proposition was effectively an 'office-as-a-service'.

This included payroll, company secretarial and legal – driven via the cloud.

However, the firm's multi-million pound investment hasn't worked out, and clients had to find a new provider at short notice.

Geniac's failure illustrates that change and disruption means risk – new offerings will not necessarily succeed, even among the biggest operators.

Ultimately, cloud-driven accounting



@AdvanceTrack

**Vipul Sheth ACA CTA, Founder and Managing Director, AdvanceTrack Outsourcing**

Vipul Sheth is a UK based ICAEW Chartered Accountant and Chartered Tax Advisor. Vipul trained with a regional UK firm before moving to Ernst & Young and KPMG. AdvanceTrack is a UK Headquartered Accountancy Outsourcing Company with offshore operational centres, delivering services around the globe.



and tax services – along with increasing options to use direct bank feeds from clients – creates an opportunity to automate.

This automation of processing then enables information to be shared between accountant and client more often and more accurately. This is why the term 'virtual CFO' is now bandied around the practice community.

Practitioners can free themselves from slogging through compliance work, and instead provide strategic and deeper advice to their clients.

And while accountants have always worked with other service providers to help clients, it is clear from Crunch, Propel and even Geniac that online offerings can broaden that scope.

"Good practices have always offered that 'FD function' but often on a relatively small scale, as you can only deal with a limited number of clients.

But as data becomes more digital it means you can offer it to more clients," adds Collins.

This is the direction of travel

for Richard Sykes, founder of CloudCFO. A KPMG-trained accountant with finance function experience, he is looking for technology to manage the finance back office for his clients – and then he wants to focus his time and efforts on advising them.

"I want to be in the passenger seat next to them," he says. "I want more contact time and a deeper relationship."

With a truly outsourced finance function, the tech deals with receipts and bookkeeping, not Richard or the client. Finance functions are normally costed at 1.5% of a business' revenues.

Sykes will charge clients 2% – the difference being the price for strategic and business development consultancy.

"If I can add that value through improving cost of sales or adding to sales, then that percentage model seems very clear for clients. Some cloud-based pricing tools offer so many options and combinations it can be confusing," he adds.

By sharing information with a

client beforehand, it means that meetings with them become more focused and productive. They become about outcomes rather than just presenting figures. "Most productive meetings are when everyone's familiar with the numbers and then meet up to come up with a direction and action-points," says Sykes.

The option for Sykes and others to provide a broader range of services will naturally become a temptation – as clients lean on their adviser for the full suite of back-office support.

For ACCA's Collins, this is a natural path and one already trod in the corporate world.

"If you look at the general CFO role, it already encompasses strategic, finance, HR, IT and cybersecurity," says Collins. "The CFO doesn't have to be an expert in all of them. For practices they can identify where the opportunities are and use other experts to deliver."

Cloud technology may be, as Sykes puts it, "a gift from the gods", but choosing technology stacks and platforms is fiendishly confusing and time draining for practices – so planning is essential.

Sykes admits he has spent "an inordinate amount of time" studying the tech options open to him. "There are pros and cons to all the choices, and the tech features move very quickly as well," he says.

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## 6 Productivity Killers in Accounting

### PRODUCTIVITY KILLER FIVE:

Process changes in the IT systems take months on end

# Integrating Xero with your subscription management system for streamlined accounting

Subscription based SMBs face unique challenges when it comes to integrating subscription and membership information with their accounting systems. Aayush Patel, Financial Controller at Fishburners, Australia's growing co-working space for tech startups, describes how they address some of these challenges to create better processes for their finance team...



With a keen interest in disruptive technologies, Aayush joined Fishburners to develop and implement the financial strategy of the company. His approach of delving into the story behind the numbers allows him to shape the future narrative of Fishburners. He seeks to utilise software at any opportunity to automate reporting and analytics to drive data-driven decision making across the organisation.

**Q:** Tell us about Fishburners and the problem you're solving...

**A:** Fishburners is Australia's largest community of tech startups. Back in 2011, Peter Davison, a seed investor of Paypal and Mike Casey, founder of GradConnection decided to create a space for aspiring tech entrepreneurs to learn, communicate and collaborate. Since then, Fishburners has continued to be a highly collaborative community with world class founders from different backgrounds and expertise. We have had more than 1000+ founders walk through our doors and in the last 18 months we have tripled our membership size and expanded to Brisbane, Australia and Shanghai, China.

**Q:** What are some of the services Fishburners offers for startups?

**A:** Fishburners' main offering provides coworking space to startup founders and teams. We provide options such as a dedicated desk, community hot desk and virtual memberships.

Membership includes meeting rooms, idea space, perks from our sponsors, pro bono sessions from industry experts, check ins with our city manager, community events, workshops and more. Fishburners has always been a founder focused community, providing opportunities for our members to grow their startup.

Members have mentioned that our biggest value add is our community of like-minded entrepreneurs who advise and support each other in their ventures.

**Q:** When did you decide that you needed a subscription management system?

**A:** Since scaling to 3 locations and tripling our membership base in less than 18 months, we realised that we needed a subscription or membership management product to support us as we grow. With growth came the challenge of billing, invoicing and member management. After extensive research, we decided to use Chargebee, a subscription billing and management product that integrates with Xero. Before Chargebee, we used Xero in

isolation for our invoicing and accounting. However, this was very manually intensive and human error prone, and we realised that we had to change our process to scale efficiently.

**Q:** What are some of the benefits of using a billing & subscription management system like Chargebee?

**A:** The biggest benefit is the ability to sync comprehensive membership data from the subscription management and billing system, like invoices, payments and taxes into Xero. This has been a huge timesaver for us.

Chargebee also has a simple, intuitive UI, and their built-in customer portal enables our members to access, edit and pause their subscriptions. Our customer service team no longer have to make these changes and the freedom of self-service has helped improve the customer experience for our members. Other benefits include Chargebee's easy integration with our payment gateway, multi-currency support, and tax-supported invoicing. The payment recovery/dunning feature



has also helped prevent bad debts.

**Q:** Why was connecting your subscription management system with Xero important to you?

**A:** Prior to our search for a subscription management system, we used a payment gateway to charge our members, while Xero was used for invoicing and accounting. Our gateway data needed to be reconciled with our invoice data. But because the gateway wasn't integrated with Xero, our team would spend time manually matching Xero invoice data to gateway charges on bank statements. This process was prone to error and it also wasn't the best use of our time.

Since Chargebee integrates with both the payment gateway and Xero, we can now automate the entire process without any hassle, whilst simultaneously managing our memberships in one place.

**Q:** Can you tell us a little more about how you handle reconciliation using Chargebee & Xero?

**A:** We use Chargebee's Chrome plugin to simplify the reconciliation process. The plugin matches our payment transactions with our bank statements in Xero, after which we can reconcile with a click of a button. The Chrome plugin has been superb and it has helped our finance team to reconcile payments with ease.

**Q:** Have you had to change any internal accounting processes as a result of using Chargebee and Xero?

**A:** One of our biggest concerns before we decided to use Chargebee was the potential of having to change our existing finance operations and processes. We were pleased to find out that the simple usability of both softwares has enabled us to keep most of our previous processes

intact, it's just eliminated the manual parts.

**Q:** Has the integration had any other benefits for your team?

**A:** The integration saves our finance team 8 hours a week from manual work. Before we used Chargebee, our customer service team did not have access to Xero, given the sensitive nature of the financial data that was stored there. This meant that they would have to request the finance team for any billing information they needed about a customer. Chargebee's role-based access helps them directly login to the billing system and access restricted data. The product therefore serves as an excellent source of truth for not just our financial data, but all our cross-functional membership data.

**FIND OUT MORE**

[www.chargebee.com/xero](http://www.chargebee.com/xero)

ApprovalMax

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**6 Productivity Killers in Accounting**

**PRODUCTIVITY KILLER SIX:**

Overworking to get audit-ready

# Meet BGL

## Your partner in compliance

Tired of spending hours with manual process? Ron Lesh introduces BGL's CAS 360 and Simple Fund 360, accounting software solutions that will simplify your ASIC corporate compliance and empower your SMSF administration business...

**W**hen we started in 1983, we were just a small consulting firm assisting accountants and businesses to gain more value from their computer systems. And as time passed, I started to question myself: why haven't some of these manual processes been automated yet? Why are our clients wasting so much time processing data?

And that's how it all started.

We first launched BGL's Corporate Affairs System (CAS) in 1989, followed by Simple Fund Desktop in 1997! Having in mind that the

accounting industry is in a state of constant change, in 2009 we decided to reinvent SMSF admin with our cloud-based solution Simple Fund 360, released to market in 2014. Followed by CAS 360, our cloud-based ASIC corporate compliance solution, in 2017.

Over the years, BGL evolved in so many ways to become Australia's most awarded and leading developer of SMSF administration and ASIC corporate compliance cloud software solutions. It's incredible to see how we went from a team of 2 employees to a well-

established company with over 120 employees and 8000+ clients.

### How will technology empower your business

We, at BGL, believe that embracing technology and moving to the cloud is all about creating efficiencies.

Have you ever thought about how highly you would like to save hundred of hours to focus on what really matters - your clients? That would be fabulous, right? Well, this is entirely possible if you have the right tools.



@BGLdot

**Ron Lesh** is the Founder and Managing Director of **BGL Corporate Solutions**

Ron has been involved in computer software for accountants for almost 30 years, being acknowledged as an industry thought leader. Prior to this, Ron spent 10 years in public practice where he led firms and qualified as a Chartered Accountant.

BGL's CAS 360 and Simple Fund 360, for example, works while you sleep; automatically importing data and processing transactions from many different sources, including ASIC, ASX, Iress, banks, brokers, wrap accounts, platforms, registries, actuary and document providers. Our open API provides seamless data sharing for all our ecosystem business partners.

Added together, these tools empower and save accountants hundreds of hours each year!

*Success in the ASIC corporate compliance and SMSF software only comes to organisations that focus on technology, client relationships and team collaboration!!*

### Integration with Xero Practice Manager

At BGL, we believe integration is the future of technology and that's why our cloud-based software, CAS 360 and Simple Fund 360, provide unique two-way integration with Xero Practice Manager.

This means, if you make a change to a person's details in Xero Practice Manager, CAS 360 is automatically notified so the appropriate ASIC forms and documents can be prepared. The same happens in Simple Fund 360 - enabling clients to maintain a single client database, the ultimate goal of a professional firm!

### When clients subscribe to BGL applications, they get much more than just software

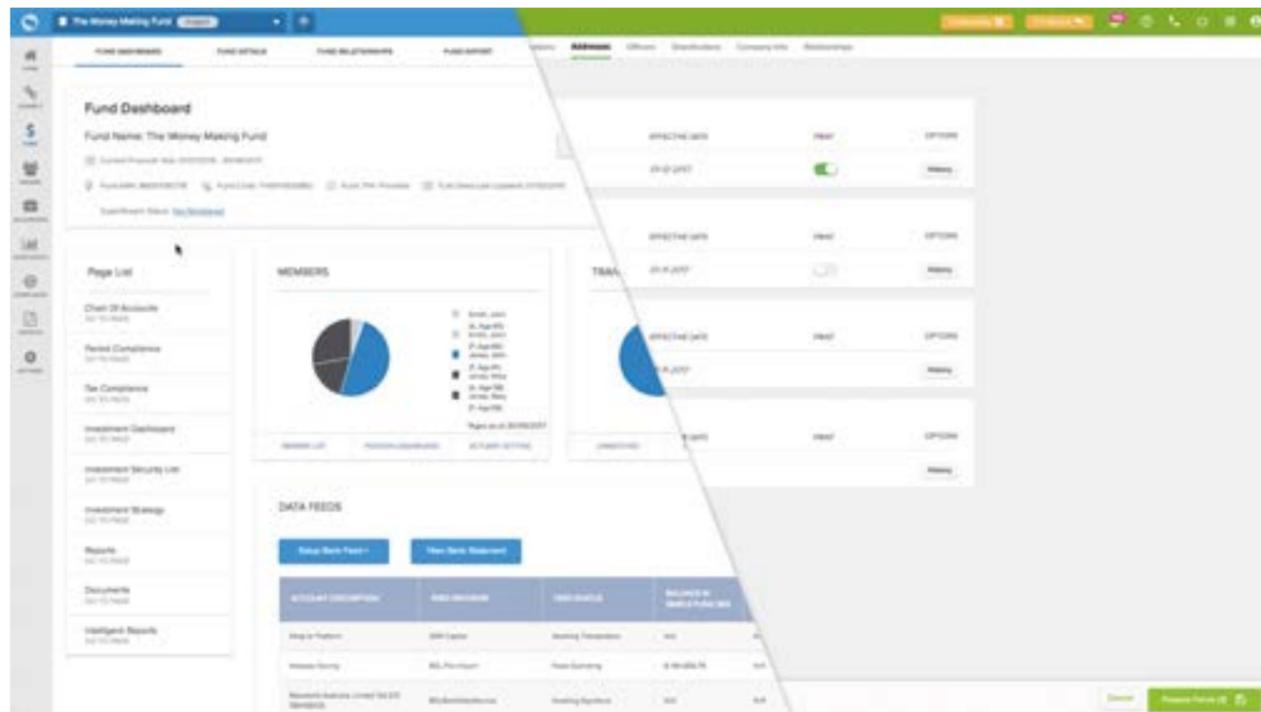
But of course the technology itself is not enough! We understand that software is useless without first class support. Therefore, our clients also get access to BGL hands-on product training, our e-Learning channel, the BGL community, podcasts, webinars, executive briefings, industry events and award-winning client service.

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# How to avoid and manage Scope Creep

You've created what you believe is a solid job management system. You've got all of your documentation sorted and a letter of engagement worthy of a Pulitzer Prize. Your client onboarding process feels like it's working.

So, why are you scrambling to finish work on time? Why aren't you making as much profit on jobs as you should be?

**Congratulations – you're the latest victim of scope creep; the silent villain of service businesses everywhere. Scope creep robs you of profit margins, stresses out your team, creates dissatisfied clients, and causes missed deadlines and rushed work that could wreak havoc on your reputation.**

So what exactly is scope creep, and how can you manage and avoid it in your business?

## What is scope creep?

In project management terms, scope creep is when the project ends up diverging from its stated outline. Usually, scope creep occurs because the client adds extra work that isn't in the original plan, or the client changes the plan in the middle of the project, or your team discovers the project requires a deeper level of work than originally thought.

For example, you're hired by the client to put some paperwork together for the incorporation of their business. However, halfway through the project the client throws another folder at you – paperwork for another aspect of the business they assumed was included in the price but you know in fact is not. That's also scope creep.

If you're in a professional service firm, you'll come across scope creep from time to time. It's not

necessarily a bad thing. Changes happen, and delivering a project that meets your client's needs is exactly what you're here to do. But when it's happening frequently and disrupting your team, you need to consider what you can do to curtail it.

## Consequences of scope creep

Dealing with the changing needs of clients is part of doing business. But, if you're struggling to manage this flexibility and scope creep is impacting too many jobs, you might discover that:

- Your staff are getting stressed out and working too much unpaid overtime to try and meet deadlines or incorporate additional requests.
- The quality of your work is suffering because you're trying to push too much out too quickly, and can't take the time for quality assurance that you normally would.
- Your profitability is being eaten away by projects running over budget and over time. If you don't, you may not even be aware of the fiscal impact until your CFO delivers devastating news.

## How do clients cause scope creep?

Our lovely, good-natured, well-meaning clients are to blame for the majority of scope creep issues. They just can't help themselves.

Clients may:

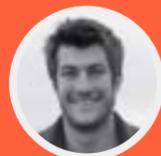
- Misunderstand the original briefing process and forget to include important information or requests.
- Be dealing with indecision in their own company, leading to lots of last-minute changes.
- Have unexpected issues at their end that impact the project.
- Forget to include key elements when creating the brief.
- Be disorganised and unable to provide you with the information when you need it.
- Fail to understand the importance of their role in the process.

You can't control your client's actions or business, but you can put processes in place to minimise problems that can lead to scope creep.

## How do you cause scope creep?

Clients aren't the only culprits responsible for scope creep. You could unwittingly be contributing to scope creep issues by failing to be clear about the brief, or there may be miscommunication issues between members of your team.

You may also be the victim of "Gold-plating" – a term borrowed from software development. Gold-plating means people on your team doing more work to over-deliver on the scope. This is scope creep that comes from your team, not the client. Wanting to over-deliver on the awesome is a good thing, but when you've got people constantly spending more time and budget on



@ignitionapp

Guy Pearson, CEO/Co-founder, Practice Ignition

10+ years of experience in professional practice and is a Chartered Accountant. His origin story starts at Interactive Accounting.

going above the scope, it ends up costing you.

## Help! We've got a bad case of scope creep. What do we do?

When it comes to scope creep, prevention is definitely better than the cure. If you've identified a current project that's besieged by scope creep, there are a few things you can do to try and turn things around.

Identify the issue. If you realise scope creep is going to cause a job to go over-budget or miss deadlines, the first thing you need to do is identify where things went wrong.

Avoid the blame game. Often, scope creep comes down to staff caving in to demands from a pushy client.

Speak to the client. Depending on where the scope creep has occurred and how far through you are, you may be able to go back to the client and explain that the work will incur an additional fee, and ask if they still want to go ahead with it.

De-stress the team. Your staff are probably working frantically to make this project happen. Let them know that their work is appreciated and that you have their back if the client complains. Bring doughnuts. Everything's better with doughnuts.

Suck it up. Sometimes you have to take scope creep on the chin and accept that you'll lose money on a job. Look at the situation as a business lesson and develop a plan on how you can prevent scope creep in the future.

## Preventing scope creep

Managing scope creep is one thing – stopping scope creep altogether is an even bigger win. Here are our tips for preventing scope creep impacting your business in the future:

- **Create a clear statement of work.** If scope creep is a common problem, it might be time to take another look at your [engagement letter](#) to make sure you use



clear, precise language and record every detail of the client's requirements. Ensure that you get every client to agree to this scope of work with Practice Ignition. It may be a simple matter of changing the questions you ask the client. [Janet Odgis for Huffington Post has some great tips](#) for improving your statement of work, including incorporating budget flexibility and outlining the key decision makers before the project gets underway.

- **Document everything.** Milestones, deliverables, communication, budget, timeframe – keep strict documentation throughout every stage of a process so that you can see problems as they arise, and can identify scope creep before it takes over.
- **Discourage gold-plating.** Encourage chronic gold-platers to express their ideas during the project scoping stage, so they can be incorporated into the budget. Try not to reward gold-platers when their initiatives cause serious scope creep.
- **Include scope changes as part of your process.** When [onboarding clients](#), explain where and how far along the process they can choose to increase scope, and how that will impact deliverables and costs. You will also require budget flexibility to account for scope changes.
- **Project management software will save your bacon.** Project management software helps you identify scope creep before it happens, so you can get clients and your team together to hash

out a solution.

- **Learn the awesome power of the word 'no'.** You're in business to do an awesome job for your clients. It can be hard feeling as though you're disappointing them by not being able to accommodate their requests.
- **Get used to it.** Know when a client is being disorganised or has changing requirements, and when you're being taken advantage of. Don't let pushy clients walk all over you – embrace the 'no' and you'll be much better off!
- **Brief your account managers on what to look out for.** The buck stops with account managers who must approve new requests as they come in. Scope creep often happens in projects overseen by new account managers who don't yet have the understanding of what's included and what isn't.

## Scope creep and your process

At the end of the day, everything boils down to process. Even the best technology won't help you manage issues like scope creep if you don't have the process to back it up.

Have you ever encountered scope creep in your business? How did you deal with it?

## FIND OUT MORE...

To find out more visit:  
[practiceignition.com](#)



# Is your technical advisory service industry-relevant?



@ezzybills

**Dr Li Fitzmaurice, co-founder, EzzyBills**

Dr Li Fitzmaurice is the co-founder and marketing manager of EzzyBills, a new generation of 'Smart' Xero connected apps for invoice data processing.

In recent years, accounting firms are expanding their services into business advisory and consulting. One form of business advisory service is technical advisory. As with any advisory and consulting services, to succeed, an accounting firm shall understand the drivers for businesses to take up advisory services and cater your services to meet industry specific demands. In short, keep your technical advices relevant to your clients' business processes, growth and success.

Li Fitzmaurice, the co-founder and marketing manager of EzzyBills, is shedding some light on this with interesting case studies in technical advisory...

**“ Among thousands of EzzyBills accounting partners, we see an emerging group of accountants that are proactive with the jobs they do. They push us hard to provide customised services to their clients. They talk to us about the industry-specific need of their clients in terms of technology, email us examples of their paperwork and workflow, and seek the best solutions to streamline the business processes.**

**While doing so, these accountants are providing advisory services in technology as an extension of their normal accounting services. They see the strength of EzzyBills in providing customised invoice automation and approval solutions for their clients. They understand that businesses are in a very competitive environment and customised solutions will drive up their profit margin and make them winners in their industries.”**

*Dr Li Fitzmaurice*

We have seen excellent technical advisory services provided to the businesses associated with the National Disability Scheme (NDIS). NDIS was created on July 2016, by the Australian government to

provide services for people with disability. These services are provided by service providers, who are typically independent contractors.

According to the Australia government forecast, over 100,000 NDIS service providers are expected, adding twenty billion dollars to the Australian Economy. This is the creation of the largest new industry in Australia in a generation. Many of service providers will be independent contractors, who will need accounting services.

EzzyBills and our accounting partners are expanding rapidly in this market. The current invoice volume and growth is truly staggering. The architecture of EzzyBills allows us to provide custom integrations, such as providing specific NDIS functionality like extracting the NDIS provider number from invoices, identifying what service is provided via our unique description to code matching. With an EzzyBills Custom Workflow, payment requests can be uploaded into the NDIS payment portal in seconds.

*“As an NDIS registered Plan*

*Manager, we help people with NDIS plans to claim and process their invoices. Implementing EzzyBills has made a huge difference to our processing time. The EzzyBills team has modified their tools for us to capture the extra details required by NDIS. This has significantly reduced our data entry time and potential for errors. Thanks to EzzyBills we're able to operate a highly efficient and scalable business.”*

*Elisa James, CEO of Plan Tracker*

Industry specific customisation like this is a huge boost to productivity. Accounting professionals that are able to implement such technology for their clients will make their services valuable to their clients, making themselves an integral part of NDIS business opportunities.

Be industry specific in technical advisory to ensure best fit. Technical advisory is about integrating two completely different industries; accounting and technology. It requires different skill sets and hence it is not without challenges.

Whilst exhibiting at Accountex London a few months ago, we had the opportunity to talk to hundreds of accountants. We discovered

that the primary purpose of these accountants was to educate themselves about the new technologies available. Technology providers were many at Accountex and the services they offered were diverse. It would take a lot listening, hands-on experience, and some technical skills for accountants to stay on top of technology and figure out the best choices for their customers.

Some of our accounting partners choose to use the technology for their own practice first and then onsell to their clients if they love to use the technology already. Fippet, a cloud solution consulting service provider is doing just that with great success. This pathway is more manageable and cost effective, especially if your practice has a small number of employees.

Some accounting firms are conservative in their choice of technology: they prefer more established and well-known brands. In being so, emerging technologies are kept out of their selections. When their clients are out searching themselves, the accounting firm may not appear in a position of technical advisor but rather the one

being advised.

It is important to find out from your clients what their business processes are and identify the best technology solutions available to help them. For example, farmers tend to get most sale invoices and expenses in the form of recipient created invoices. Therefore, the technology advice needs to be industry-specific to ensure the best fit.

*“At EzzyBills, we strongly believe that it is important to cater for the technological needs of many different industries. Generic technologies may be sufficient to make your accounting and tax digital; however technology that has been customised for the industry would deliver the maximum benefits to the businesses.”*

*Dr Li Fitzmaurice*

In addition to the smart machine learning, EzzyBills is geared towards smart customisation. Our technology design enables us to deliver customisation rapidly. Our customisation is either in the form of special document data extraction, or in the form of

automating business processes with custom workflow. Figure 1 shows an example of EzzyBills custom workflow.

With comprehensive application programming interface (API) support, EzzyBills can readily integrate with many other accounting software. It allows not only the retrieval of invoice data, but also allows the use of our special machine learning, supplier/product matching algorithms, and other smart components of our technology. EzzyBills also supports different workflows, i.e. business processes.

EzzyBills has grown to provide services for businesses of all sizes. For small or medium enterprises, EzzyBills provide services to them mostly via our accounting partners. To service larger businesses, EzzyBills works extensively with industry partners, with EzzyBills as the core of the technology via API.

**FIND OUT MORE...**

To find out more visit:  
[ezzybills.com](http://ezzybills.com)

## Sarah's Story

No Limit Bookkeeping is asked by Sarah to help her solve a problem. She runs a bakery, which generates hundreds of sale invoices every day, and that is too many to export to Xero as it will choke her Xero account.

No Limit Bookkeeping sets up an

EzzyBills account with a custom workflow and Sarah's web ordering software sends all her invoices to EzzyBills. EzzyBills will upload to Xero a single Invoice at the end of the day for Sarah. This single invoice will contain a summary of everything she has sold that day.



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# Embracing the new-age of accounting: keep up or risk falling behind

There is no hiding from the drastic impact of technological advances on business; and the influence these changes have on the accounting industry is no exception. The constant rapid change triggered by the data revolution means that the need for more data, across more channels, is more prevalent now than ever before...

**W**ith companies across all industries adopting SaaS principles, today's accounting firms are being challenged to acquire new practices and measure performance in new and emerging ways. The willingness of a company to extract value from the resources available defines the difference between their success and failure.

Smart accounting firms are capitalising on new technologies and data to help attract and retain clients.

Are you one of them?

You're likely experiencing the disruption that developments in machine learning and AI are having on you and your competitors. Are you leveraging these changes and

allowing them to automate tasks to save you time and money?

**Despite advances in machine learning and artificial intelligence, the value in human interaction remains**

It is with no surprise that the importance of fostering meaningful relationships with clients is imperative to the success of any business, even in an automation-driven culture. The ability for accountants to automate many of their most tedious tasks frees up time; allowing them to dedicate more resources to developing client relationships and becoming better advisors.

Automation provides organisations with the necessary tools to expand service offerings, but does not threaten their existence entirely. With more time and more data, accounting firms are able to provide proactive advice and adopt the role of a business advisor, not just an accountant.

Bottom line, you and your business can coexist with technology, you just need to figure out how it can add value to your role as a trusted service provider.

**Proactive action in the era of automation**

Generally speaking, the technical

revolution is driven by consumer demand for not only increased data, but improved data quality and governance. Automation software is becoming the norm for innovative, growing accounting firms, and, exploring ways to leverage tools and their integrations helps them service their clients in new ways. The use of new tools allow for more time to focus on future strategy and fostering strong client relationships.

Accounting professionals who stay on top of their data using the latest trends and tools position themselves favourably and are better prepared to offer the highest level of service for their customers. One great way for businesses to monitor their success is to consider using dashboards, a cloud based reporting solution for accounting and business professionals.

**So, how should I prepare for the inevitable changes to come?**

**1. Prepare for the new age of workers**

Aside from culture, flexibility and social needs that millennials expect, they are also entering the workforce equipped with a new level of technical accounting expertise, due to major changes in accounting education.

KPMG's launch of its Master of Accounting with Data Analytics



@klipfolio

**Stef Reid**, Digital Marketing Specialist, Klipfolio

Stef Reid is a content marketer with a love for writing and design. A curious mind with a desire for continuous learning, Stef is passionate about health and wellness, secretly loves a good DIY project, and acts as a mentor to students in her community.

She graduated with a Bachelor of Commerce Degree in Marketing from Carleton University in Ottawa, Canada.



## EzzyBills Invoice Data Processing

### EzzyBills, Put Xero on Autopilot



Line items are extracted with full description; Support multiple-level management approval, Automatic Job/Region/Project Tracking, and Account codes automation based on your Xero invoice history.



Technology for Tomorrow

Program, which was developed in collaboration with The Ohio State University Max M. Fisher College of Business and the Villanova School of Business, is being rolled out at a number of universities in the U.S.

The program was created to educate and prepare future accounting professionals to keep up with changing client demands - meaning improved service, deeper insight, and the sheer volume of data in the world today.

### 2. Teach your staff now

With educational institutions adopting new degree programs that are streamlined with the new technology era, accounting firms must adopt this same malleable mindset; ensuring they are conscious of the priorities of their new recruits.

Create an environment where this new age of workers can flourish. Prepare your current staff by

providing resources for them to develop open-mindedness, adaptability, and willingness to learn to support the technological shift; after all, these skills will be necessary as new technology will be the new norm of client service.

Mastering these skills means that you will be prepared for the future and will no doubt position your firm to provide the highest degree of personalised services.

### 3. Embrace remote work as the norm

This is an easy one, and realistically, a practice your firm should already be doing - with policies in place to facilitate flexibility and the ability to work from anywhere.

Decentralised work and virtual offices are key for employee satisfaction and productivity. Consider implementing a team messaging and workflow management system such as Slack and Trello, that will

give your firm's partners an unsolicited view of the status on client files.

### 4. Drill down data security measures

All of these advancements in technology bring new concerns surrounding data security. Educating your team on the best IT security practices is critical in securing client information.

Adapting a data-driven mindset as an accountant is imperative to staying relevant and successful in the new era of technology. Embracing change and providing innovative client service will position you as a business advisor. What other ways are you ensuring that your team embraces and capitalises new change?

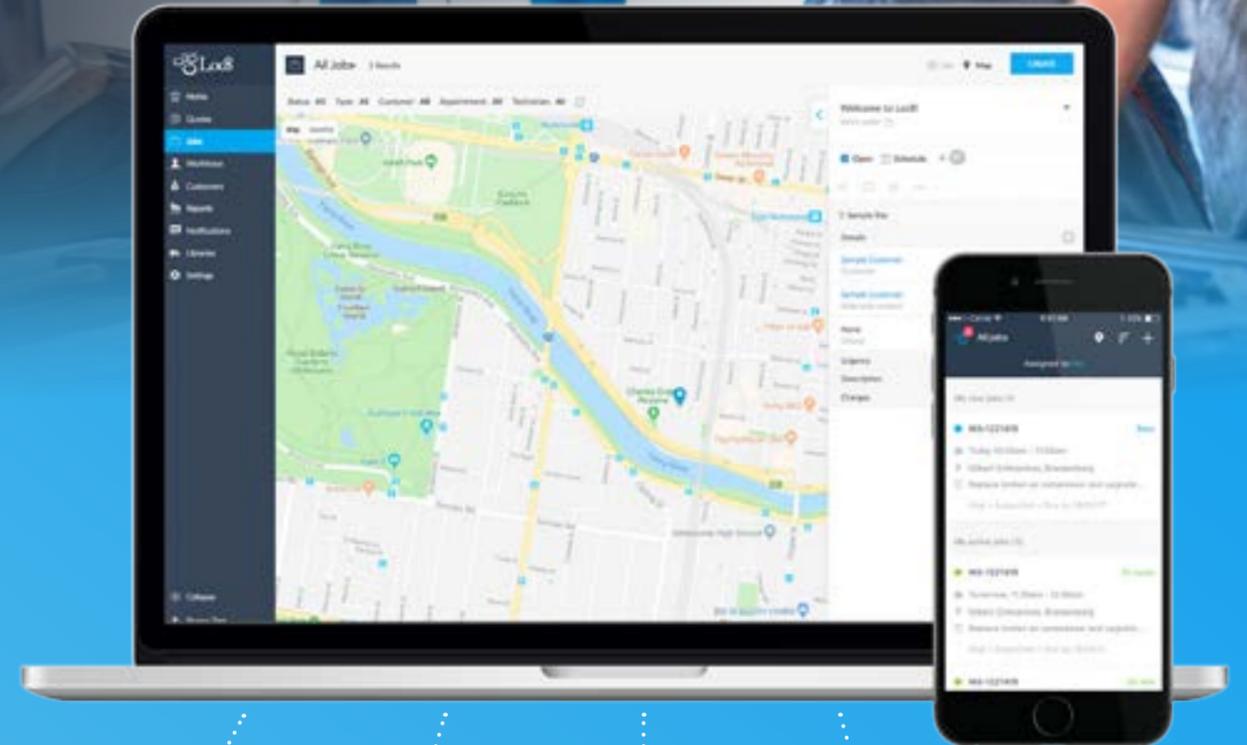
**FIND OUT MORE...**

To find out more visit:  
[klipfolio.com](http://klipfolio.com)



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[www.accon.services](http://www.accon.services)

# 5 reasons why accountants love SuiteFiles



@SuiteFiles

**Kim Anderson**, Marketing Manager, SuiteFiles

Kim is the Jane-of-all-trades Marketing Manager at SuiteFiles. After falling into software a bit by accident, she's now a passionate advocate for better tech and people-focused processes for businesses.

In 2013, Prince George was born, Pope Benedict XVI resigned, and SuiteFiles integrated with Xero. Since then, SuiteFiles has become a Xero HQ partner and a popular Xero add-on for cloud-based file management. SuiteFiles is now a go-to app, particularly for accountants moving to Xero's Practice Management platform. But why? What attracts accountants to SuiteFiles? We decided to ask some of our customers...

## What is SuiteFiles?

SuiteFiles is a cloud-based document management app designed for accountants and other small-medium businesses. With it you can easily store, manage and work with your business files, all from one place online. From editing files and creating templates, to scanning and Outlook integration, SuiteFiles is kitted out with features to make managing your documents a breeze. SuiteFiles also integrates with popular business tools like Microsoft Office, Outlook, and Xero so that you can really hit the ground running in the cloud.

5 reasons why accountants love SuiteFiles:

### We could move off a server and become cloud-based

*Crystal Robinson from Chancellors Chartered Accountants*

As a progressive accounting firm, we are always looking at ways to streamline and improve our business. We wanted to move away from server-based products and look towards the cloud. SuiteFiles has given us the tools to be able to finally make this a reality.

After migrating to SuiteFiles, we could move completely away from our server and stop using "the always unreliable" remote desktop for staff working away from the

office. Being cloud-based means our staff can now access what they need, wherever they may be, using a much faster and more reliable method. We are so happy with SuiteFiles and haven't looked back.

### Being able to save emails and attachments into SuiteFiles

*Michael Garcia from Garcia Group Advisors*

We love email file management in SuiteFiles and the ease of using the Outlook add-in. With SuiteFiles, we can ensure that everyone can access the emails and attachments

we've saved across the practice. It's been useful to not have them stored in any one person's Outlook inbox. It's also made collaboration and being able to view conversations and history a lot easier.

We use the email template feature a lot – being able to create consistent, standard emails that anyone in the practice can send has been great. We use it for everything now – setting up workflows for requesting information, onboarding clients, quotes, etc. When we build templates, we make sure they already have PDFs or documents attached to the email. So, when we send tax returns to every client, the attachment is already there – we don't have to think about it anymore, we just pre-populate it with client data from Xero and send it.

### It's simple to use

*David Aston & Belinda Patton from Delante Accountants*



Going from a server-based environment to a completely cloud-based environment, we've had to place a lot of trust in our document management system and the backup of our data.

Prior to being 100% "in the cloud", we had to rely on remote desktops and VPNs when working outside the office. Now with SuiteFiles, we have instant access to the data we use to run our business. We can readily store, and find, documents and emails on the fly! SuiteFiles also saves us time when we're back in the office, as we don't need to upload files to the document management system.

SuiteFiles is simple to learn, even for someone from a non-accounting background. The set-up is straight forward and finding files is a breeze. This all adds to the efficiency of running our business – less time searching for documents means more time adding value to our clients, as well as building our business.

### Connected to our one-source-of-truth in Xero

*Michael Risoli from MKS Group*

SuiteFiles is connected to our source of truth in Xero Practice Manager. We love not having to copy and paste client data into documents. Instead, we use the template pre-population feature in SuiteFiles, so if the source of truth is right, then client information pre-populates correctly in the template.

Using the templates feature has changed the way we deliver documents to clients. We use it on multiple levels, but particularly for fixed-price agreements and general correspondence. We have standard templates that we can pre-populate with the required fields out of Xero's CRM – the client name, the addressee, the salutation and email – which eliminates so much processing time when we're doing it at volume. When you look at a project like issuing 200-300 fixed-price agreements, we're saving a mountain of time.

We also love being able to show someone how to use templates once, and they can do it. This really improves the speed of completing tasks like this.

### Standardises how we work

*Jeremy Fox from The Fox Group*



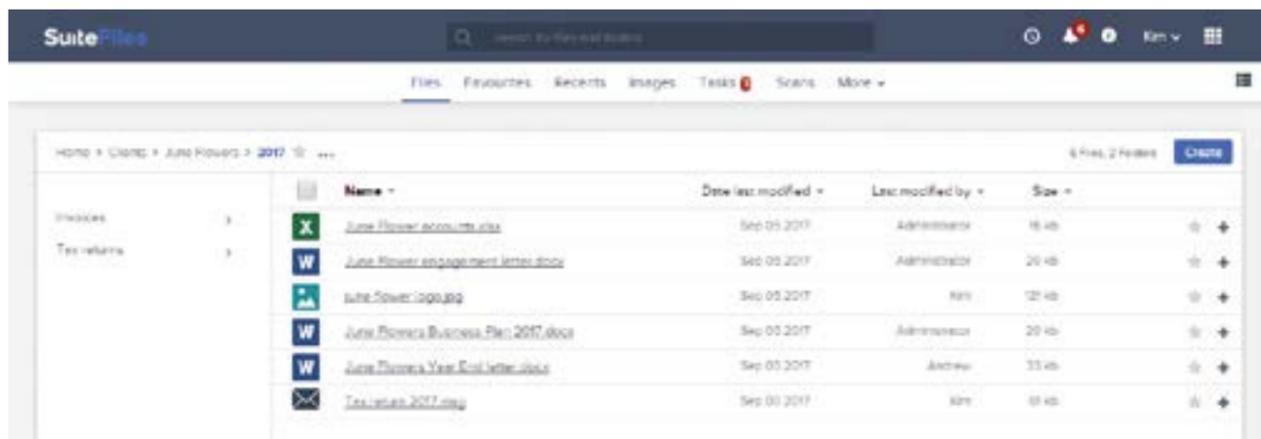
We love SuiteFiles because it provides a seamless, efficient and user-friendly experience. It helps

us to collaborate on client files, and has been a massive time saver for creating common documents and file structures. Our team finds that it has helped us to standardise how we work so we can do things more efficiently, which helps businesses growing their team or client base, like us. For example, when we onboard a new client, we can select a predefined folder structure through the folder template we've set up. We can do this at the click of a button. Creating new documents from templates is also easier and quicker than previous processes.

## FIND OUT MORE...

We originally built SuiteFiles because we couldn't find an existing product like it – a robust, simple, cloud-based file management system for small-medium businesses that made it really easy to move to the cloud. The years have proved that we weren't the only ones who needed SuiteFiles, and we're so proud of the good feedback we've received from customers.

If you'd like to take SuiteFiles for a test drive or to view a demo, visit us at: [suitefiles.com/trial](https://suitefiles.com/trial)



# Compared: Practice Management

For more information, please visit:

**Senta** - [senta.co](http://senta.co)

**Karbon** - [karbonhq.com](http://karbonhq.com)

**Xero Practice Manager** - [xero.com/practicemanager](http://xero.com/practicemanager)

**Glide** - [whatsglide.com](http://whatsglide.com)

**AccountancyManager** - [accountancymanager.co.uk](http://accountancymanager.co.uk)

	Senta	Karbon	Xero Practice Manager	Glide	Accountancy Manager
<b>Client Onboarding</b>					
Assisted contact import	✓	✓	✓	✓	✓
Assisted processes & work import	✓	✓	✓	✓	✓
Onsite or remote onboarding assistance available	✓	✓	✓	✓	✓
eSign Letters of Engagement	✓	-	With Practice Ignition	-	✓
eSign Terms & Conditions	✓	-	With Practice Ignition	-	✓
<b>Workflow - Task Management</b>					
Staff Task Management	✓	✓	✓	✓	✓
Deadline Calendar	✓	-	✓	✓	✓
Deadline Reminders	✓	-	✓	✓	✓
Automated Staff Allocation	✓	✓	-	✓	✓
Adhoc Tasks	Client & Practice	✓	✓	✓	✓
Recurring Tasks	✓	✓	✓	✓	✓
Rule/role based process automation and access	✓	✓	-	✓	✓
Custom job fields	Unlimited	✓	✓	✓	✓
Auto job creation	Unlimited triggers	✓	-	✓	✓
Job allocation options (manual, automatic, pool system)	✓	✓	-	✓	✓
Custom work statuses	✓	✓	✓	✓	✓
Work types	✓	✓	✓	✓	✓
Work templates	✓	✓	✓	✓	✓
Work timelines	✓	✓	✓	✓	✓
See upcoming jobs	✓	✓	✓	✓	✓
See upcoming tasks	✓	✓	✓	✓	✓
Track overdue tasks	✓	✓	✓	✓	✓
Approvals	✓	-	-	✓	✓
Automatically chase clients	✓	✓	-	✓	✓

	Senta	Karbon	Xero Practice Manager	Glide	Accountancy Manager
Job notes	Unlimited	✓	✓	✓	✓
Job documents	Unlimited	✓	✓	✓	✓
Monthly progress summary & charts	Future & Historical	✓	-	-	✓
Track individual jobs & task across your firm	✓	✓	✓	✓	✓
Calendar view of when jobs are booked to be worked on	✓	✓	✓	✓	✓
Track jobs against milestones, budgets and due dates	✓ Not budgets currently	✓	✓	✓	Coming soon in new releases
Individual to-do lists	✓	✓	-	✓	✓
Colleague assignments	✓	✓	-	✓	✓
<b>Time Management</b>					
Track Time with Timer	Coming soon	With Tsheets integration	✓	✓	✓
Track Time against Tasks	✓	-	✓	✓	✓
Timesheets	Coming soon	With Tsheets integration	✓	✓	✓
Chargeable Time	Coming soon	With Tsheets integration	✓	✓	✓
Time to WIP	-	-	✓	✓	✓
Configure multiple charge rates for any combination of user/workflow/client	-	-	✓	✓	Coming soon
Optionally set required minutes per user/day, submission and approval stages	-	-	-	✓	Coming soon
Comprehensive reporting on timesheet entries, bills, client profitability, staff productivity	Coming soon	-	✓	✓	✓
<b>Document Management</b>					
Secure Document Storage	✓	✓	25Gb included	✓	✓
Upload files to job cards, client cards and users. Visible on job/client/user cards and in Google apps	✓	✓ Not with Google apps	✓	✓	✓
Attached documents to jobs + tasks	✓	✓	✓	-	Coming soon

	Senta	Karbon	Xero Practice Manager	Glide	Accountancy Manager
File management	✓	✓	DropBox/Box/GSuite/SuiteFiles	-	✓
Attach files to tasks & notes	✓	✓	-	-	✓
<b>Invoicing</b>					
Create Invoices	-	-	✓	✓	✓
Send Invoices	-	-	✓	-	✓
<b>Users</b>					
User Levels	✓	✓	✓	✓	✓
User Permissions / Roles	✓	✓	✓	✓	✓
<b>Security &amp; Privacy</b>					
GDPR Compliant	✓	✓	✓	✓	✓
<b>Reporting &amp; Insights</b>					
Flexible & Customisable Report Builder Tool	-	✓	✓	✓	Coming soon
<b>Search &amp; Filtering</b>					
Global search	✓	✓	✓	✓	✓
Contact list filtering	✓	✓	✓	✓	✓
Work list filtering	✓	✓	✓	✓	✓
Task filtering	✓	✓	✓	✓	✓
<b>Education &amp; Technical Support</b>					
Online education, knowledge base & video tutorials	✓	✓	✓	✓	✓
Regular Webinars (region dependent)	✓	✓	✓	-	✓
World class 24/7 support	✓	✓	✓	✓	✓
Call-back support for complex issues	✓	✓	✓	✓	✓
In-product training & Community	-	✓	✓	✓	✓
1:1 champion training	✓	✓	✓	✓	✓
Team live training	✓	✓	✓	✓	✓
<b>Additional Features</b>					
Mobile App	✓	Accessible in mobile browser	✓	-	✓
Client Portal	✓	✓	-	✓	✓

Compiled by Matt Flanagan, Director, BlueHub (Web: [bluehub.co.uk](http://bluehub.co.uk), Twitter: @Blue\_Hub)

This information was true and correct at the time of publishing. Releases happen all the time. Please contact the App for the latest release information.



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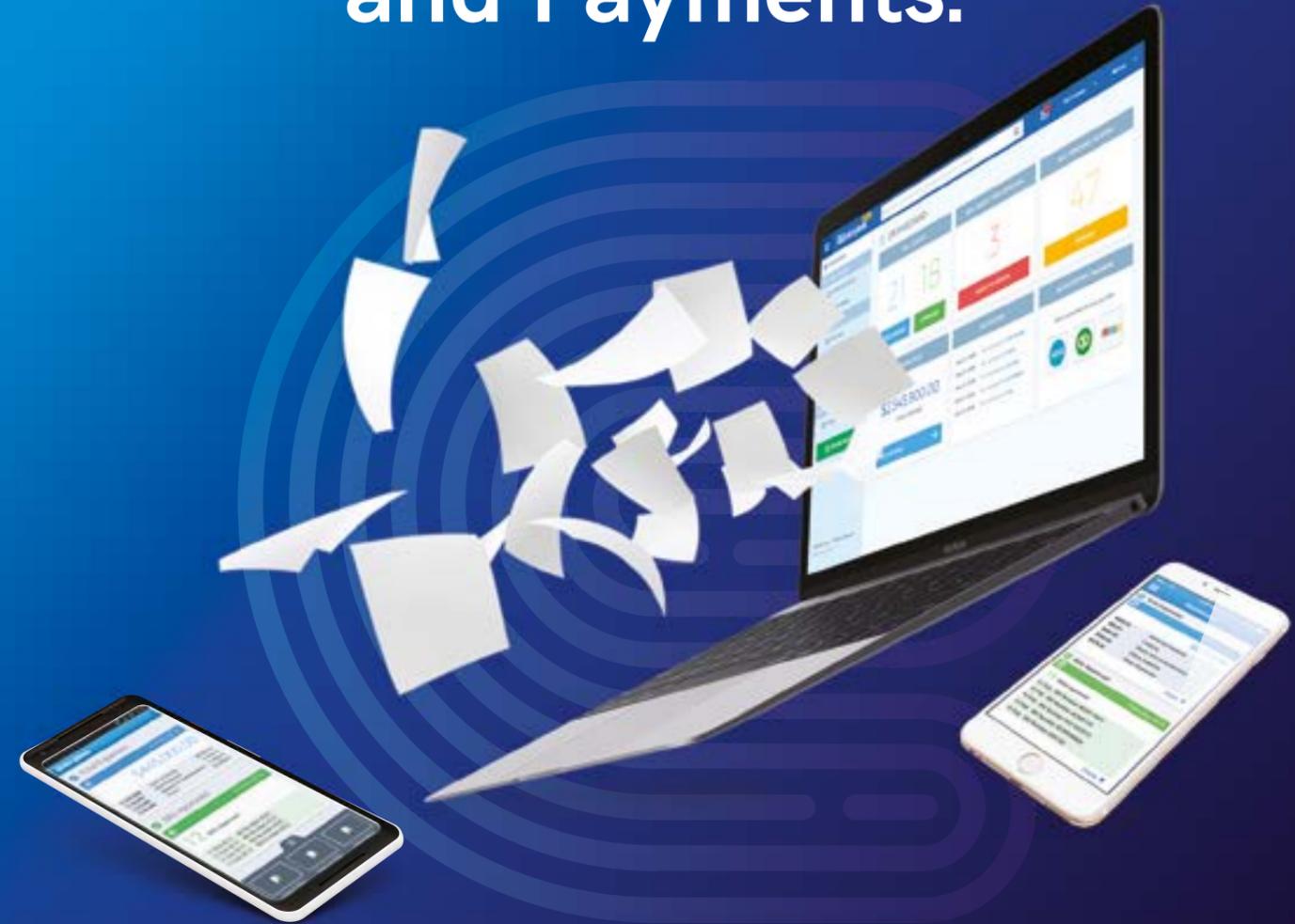
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# New to the Xero App Marketplace

## New App shout-out

Are you a new Xero-connected App? Let other Xero users know... email alex@xumagazine.com

### Bills / Expenses

#### Receipt Stash

[receipt-stash.com/integration/xero](http://receipt-stash.com/integration/xero)

Receipt Stash automates data entry and storage of your business expenses. It's automated bookkeeping software that's simple, accurate and fast.

### Custom-made Integration

#### Squirrel Business Hub

<http://squirrelcrmhub.com.au/zoho-crm-xero-integration/>

Squirrel Business Hub is a Melbourne-based consultancy specialising in CRM implementation, customisation, development, integration, automation and training. Streamline your business and marketing processes to set you up for success with Squirrel Business Hub.

### Debtor Tracking

#### Ezi Debt Collection

[ezidebtcollection.com.au/xero-integration](http://ezidebtcollection.com.au/xero-integration)

Ezi Debt Collection automates collection of your debts by systematically progressing through a tried and tested debt collection process. With 2-3 clicks Ezi Debt Collection will take outstanding invoice information from Xero and commence the debt collection process. Speed up your accounts receivable by integrating Xero with EDC.

### Invoice & Jobs

#### Ascora

[ascora.com.au/home/xero](http://ascora.com.au/home/xero)

Job Management Made Easy. Ascora is the all-in-one solution for reducing administration overheads and improving productivity by providing quotes, job scheduling, invoices and business reporting on your iPad, iPhone, PC or Android device.

### Payments / Finance

#### Beyond Merchant Capital

[beyondmerchantcapital.com.au/xero/](http://beyondmerchantcapital.com.au/xero/)

Beyond Merchant Capital provides unsecured cash advances of up to \$500,000 to qualifying merchants, with flexible repayment options and no hidden fees. Xero customers can apply online for approval in hours.

### Other

#### InView

[inviewapp.com](http://inviewapp.com)

Synchronise Xero invoices and bills to your calendar. One click integration with all your desktop and mobile calendar applications. Never forget to pay your bills or chase up overdue invoices again.

### Payroll / HR

#### Gpayroll

[gpayroll.com](http://gpayroll.com)

Gpayroll is an easy to use, self-run online payroll service. It provides a comprehensive online payroll solution for your CPF filings, tax declaration and salary payments.

#### Happy HR

[happyhr.com](http://happyhr.com)

Its HR made Happy. Want legally compliant HR policies, contracts

and employee performance management? Manage payroll and leave with Happy HR's seamless Xero cloud-based integration.

#### Paychex

[pages.paychex.com/xero](http://pages.paychex.com/xero)

Paychex is a leading provider of integrated solutions for payroll, HR, retirement, and insurance services, empowering business owners to focus on the growth and management of their business.

### POS / Hospitality

#### Redcat

[redcat.com.au/xero](http://redcat.com.au/xero)

Hospitality software, by hospitality people, for your hospitality business. Redcat helps cafés, restaurants, bars and franchises to thrive and grow, by giving them complete visibility and control of business information.

#### Tevalis

[website.tevalis.com/tevalis-and-xero-integration/](http://website.tevalis.com/tevalis-and-xero-integration/)

Tevalis is a leader in supplying innovative Epos technology solutions and enterprise tools to the hospitality, leisure and gaming industries. Simplify and streamline your accountancy process across the business with Travalis and Xero.

### Xero Practice Manager

#### Doc2Data

[doc2data.com](http://doc2data.com)

Streamline your invoicing process with Doc2Data. Doc2Data offers clients the tools, resources and guidance necessary for all of their accounts payable processing needs.

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# Updates and new releases from the Xero App Marketplace

## New feature shout-out

Are you a Xero-connected App? Got a new feature or update you'd like to share with the Xero User community? Email alex@xumagazine.com

### Account Kit [account-kit.com](http://account-kit.com)

AccountKit's new releases include the addition of the Fuel Tax Credit Calculator to the toolkit, as well as integrations with BGL CAS 360 and SimpleFund 360. Other updates include the addition of one-off events for the Equipment Finance Tool (re-financing/early payout), many-to-one contact support with XPM and other XPM sync refinements, and email integration within the Correspondence Register (beta).

### ApprovalDonkey [approvaldonkey.com](http://approvaldonkey.com)

Over the past few months, the team at Approval Donkey have been busy with some really significant updates and releases. This includes:

- Multi-step approvals
- Required Response approvals
- Conditional field mapping
- Xero additional attachments
- Xero raw data attachments
- Auto Approve transactions
- Turn on/off approval notifications
- My Pending Folder view

This provides all Approval Donkey users greater functionality with significant enhancements to our integration with Xero.

### ApprovalMax [approvalmax.com](http://approvalmax.com)

With the latest release, ApprovalMax delivers the long-anticipated extension of its Bill to Purchase Order Matching capability. In addition to the manual matching of POs and Bills, there will be the option of matching POs and Bills automatically and enabling automatic approval for the corresponding matched Bills. Also, it will be possible to use POs as virtual budgets with the capability to split and allocate incoming Bills. Recent releases have already introduced the functionality for a

Side-by-Side Bill View as well as a significant UE enhancement, thanks to the Optimistic Approval feature. Clicking the "Approve" button immediately marks the PO or Bill as "Approved" without having to wait for the system to respond.

### BGL [bglcorp.com](http://bglcorp.com)

During the first half of 2018, BGL released a number of new features to its cloud-based solutions, including the long-expected and unique AI Assistant in Simple Fund 360. The AI Assistant has been developed to help solving the problem of incorrect transaction posting in Self Managed Super Fund (SMSF) ledgers, meaning: less errors, less review time and less audit adjustments. It will save a huge amount of time and cost for SMSF administrators.

### Castaway Forecasting [castawayforecasting.com](http://castawayforecasting.com)

**New:** brand new software version, new look, new features  
**New:** enhanced integrations, dashboards and reporting capability  
**New:** one-touch integration with MS Excel

Since our original release in 2010, replacing WinForecast at the time, we have grown our reputation around the world as the leading business modelling software solution for small to medium businesses. Castaway are also the preferred business advisory tool for practicing accountants. The latest version of Castaway, Release 2018, is the most powerful and functional yet.

### CloudPayroll [cloudpayroll.com.au](http://cloudpayroll.com.au)

- Single Touch Payroll enabled
- Ability to process payroll with

- WPN only
- Ability to manage RDO's and TOIL

### Connectably [connectably.com](http://connectably.com)

Connectably is now helping reduce evening sales & marketing admin for accountants, consultants, a cleaning company, PR & marketing agencies, therapists, coaches, and more. We're also delighted to be the first small business CRM to be a GoCardless Partner. With direct debits that can be easily set up from quotes and order forms and automatically reconciled by Xero, that's a lot of bookkeeping (and chasing!) admin saved for small service businesses.

### Float [floatapp.com](http://floatapp.com)

Introducing our brand new feature - multi-budgets! You can now easily break down each line in your chart of accounts into separate amounts with individual payment dates, giving you complete control over how you show cash moving in and out of your business. Thanks to multi-budgets, your cash flow forecasts are more flexible, granular and accurate than ever before and scenario planning is even more powerful!

### G-Accon [www.accon.services](http://www.accon.services)

G-Accon has launched a new release that includes a set of features for automation of Xero reporting in Google Sheets. You can now automatically update a query or report by using a flexible schedule, providing your clients with a real-time analytics right in Google spreadsheets. Some of the features include:

- Auto-Refresh Scheduler
- Email updated spreadsheets automatically
- Backup Historical Data in Google



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Drive

- Data Monitoring
- Added AU Payroll and Assets for download

**Infoodle**[infoodle.com](http://infoodle.com)

In addition to managing the various lists of people connected to your organisation, the primary reason for adding Infoodle as your Xero add-on app is to manage your donations. Infoodle allows you to take online payments, track pledges and donations, generate receipts, file Gift Aid claims plus much, much more.

Recent changes include; Infoodle has a much improved receipt templating engine, giving you greater control of the output and design. It can now manage part payment of Xero invoices. Outputting statements has been an improvement often requested, which is now available. This uses the sophisticated clustering techniques built into Infoodle which allows regional or divisional breakdown of contacts, campaigns and transactions ensuring privacy between regions if required.

**iPayroll**[ipayroll.co.nz](http://ipayroll.co.nz)

- Top-up tool to ensure minimum wage requirements are met, great for the rural sector
- Automatic recognition of regional anniversary days as public holidays
- Projected leave calculator in the Employee Kiosk

**Loc8**[loc8.com](http://loc8.com)

Job Management solution Loc8 recently released a new Calendar feature! With a full screen mode listing all in-field workers and showing options for working week, weekly, and monthly, the new Loc8 Calendar has a dedicated section at the top displaying all non-assigned jobs. Based on availabilities, jobs can then be dragged and dropped to technicians at the chosen time. This new feature allows Loc8 users to increase proactivity!

**Microkeeper**[microkeeper.com.au](http://microkeeper.com.au)

Australia's only all-in-one solution for managing your Rosters, Timesheets and Payroll online, Microkeeper continues to bring even more functionality to our users:

- An invoice for payroll can now be imported directly into Xero with full Tracking Categories. Microkeeper generates reports such as wage breakdown, overtime, bonus, tax and superannuation. Each expense can then be allocated to the relevant account.
- Single Touch Payroll functionality is now live. You can submit payroll data (salaries and wages, PAYG withholding and superannuation) electronically to the ATO each time you complete a pay run.
- The release of our Skills Matrix feature allows for the collection, approval and storage of employee documentation and skill endorsement. This includes 100Mb of storage per employee.

**Practice Ignition**[practiceignition.com](http://practiceignition.com)

Australia's only all-in-one solution for managing your Rosters, Timesheets and Payroll online, Microkeeper continues to bring even more functionality to our users:

- An invoice for payroll can now be imported directly into Xero with full Tracking Categories. Microkeeper generates reports such as wage breakdown, overtime, bonus, tax and superannuation. Each expense can then be allocated to the relevant account.
- Single Touch Payroll functionality is now live. You can submit payroll data (salaries and wages, PAYG withholding and superannuation) electronically to the ATO each time you complete a pay run.
- The release of our Skills Matrix feature allows for the collection, approval and storage of employee documentation and

skill endorsement. This includes 100Mb of storage per employee.

**Re-leased**[re-leased.com](http://re-leased.com)

Re-Released has seen new product updates in areas of client accounting, service charges, reconciliations, integrations and more, as well as launching NEW mobile apps into the market. Re-Released's Landlord mobile app will give owners complete oversight on how their portfolios are tracking - in real-time. And with the Tenant app, occupiers will have full visibility of their lease, including the ability to log maintenance issues and monitor their progression.

**Spotlight Reporting**[spotlightreporting.com](http://spotlightreporting.com)

Upcoming features include better comparative reporting, new industry templates, and personal wealth reports. Save time and improve forecasting accuracy with our dynamic rules. We've added a loan rule for client financing and regional tax schedules.

**Tidy**[tidyinternational.com](http://tidyinternational.com)

- The integration of Xero payroll with TidyWork, TidyBuild and TidyEnterprise
- The release of eCommerce integration with major eCommerce vendors including Shopify

**Unleashed**[unleashedsoftware.com](http://unleashedsoftware.com)

At Unleashed, we're dedicated to helping our users capture market opportunity and stay one step ahead of their competitors. We've released a B2B platform to provide businesses with a tool to help them carry out their B2B e-Commerce transactions efficiently. Our B2B platform will allow the business to promote their products and allow customers to lodge sales and check product availability.

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**ExpenseTron** | @expensetronhq  
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**Lightyear** | @lightyearco  
lightyear.cloud

**MileIQ** | @MileIQ  
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**Nexonia** | @nexonia  
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tripcatcherapp.com

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trippeo.com/xero

**Veryfi** | @Veryfinance  
veryfi.com/xero

**webexpenses** | @webexpenses  
webexpenses.com

**Webrecs** | @Webrecs  
webrecs.com.au/xero

**Xpenditure** | @Xpenditure  
xpenditure.com/en/xero

**Zahara** | @ZaharaSoftware  
zaharasoftware.com

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[www.bluehub.co.uk](http://www.bluehub.co.uk)

**Invisible Business Solutions** | @invizbiz  
authorisedcloudintegrator.com.au

**LimeCloud** | @LimeCloudLtd  
limecloud.tech

**LimeCloud**  
cloud integration specialists

[limecloud.tech](http://limecloud.tech)

**Waypoint** | @We\_Are\_Waypoint  
wearewaypoint.com

## Conversions

**Click 2 Convert** | @C2Convert  
c2convert.com

**cloudconvert** | @CloudconvertSa  
cloudconvert.co.za

**ConvertworX** | @ConvertworX  
convertworx.com.au/xero-conversion

**FITmyBooks**  
fitmybooks.co.za

**JetConvert** | @JetConvert  
jetconvert.com.au

**Movemybooks** | @movemybooks  
movemybooks.co.uk

**MMC Convert** | @mmconvert  
mmconvert.com

**XpressConvert**  
xpressconvert.com.au

## CRM

**24SevenOffice** | @24SOsupport  
24sevenoffice.com

**Accelo** | @acelo  
www.acelo.com

**AccountancyManager** | @accountancymgr  
accountancymanager.co.uk

**Administrate** | @GetAdministrate  
getadministrate.com

**AffinityLive** | @affinitylive  
affinitylive.com

**Agile CRM** | @agilecrm  
agilecrm.com

**Arlo**  
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**Base CRM** | @getbase  
getbase.com

**Batchbook** | @batchbook  
batchbook.com

**Breadwinner** | @Breadwinner  
breadwinner.com/xero-salesforce

**BriteBiz** | @britebiz  
britebiz.com/xero-crm-integration

**CallPro CRM** | @callprocrm  
callprocrm.com

**CapsuleCRM** | @CapsuleCRM  
capsulecrm.com/addons/xero

**Carry The One For Salesforce**  
carrytheone.co.uk

**ClickDesk Live Chat** | @ClickDesk  
clickdesk.com

**Client Heartbeat** | @ClientHeartbeat  
clientheartbeat.com

**ClubHub** | @ClubHubSSL  
clubhub.co.nz

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customersure.com/xero

**Exsalerate** | @exsalerate  
exsalerate.com/xerointegration

**Freshdesk** | @freshdesk  
freshdesk.com/xero

**Friendly manager**  
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**Fuseboard** | @Fuseboard  
fuseboardapp.com/xero

**Google apps for work**  
xero.com/uk/google

**Handshake** | @handshake  
handshake.com/integration/xero

**Highrise Connector By Xero**  
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insightly.com

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**Legrand CRM** | @LegrandCRM  
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magnetismsolutions.com

**Mailchimp by OneSaas** | @onesaas  
onesaas.com/integrate

**MembershipWorks**  
membershipworks.com

**Ninjodo** | @Ninjodo  
ninjodo.com

**OnePage CRM** | @OnePageCRM  
welcome.onepagecrm.com

**OneSaas for Salesforce** | @onesaas  
onesaas.com

**OneSaas for Zoho CRM** | @onesaas  
onesaas.com/integrate

**Pepperi** | @PepperiLTD  
pepperi.com

**Piesync** | @PieSync  
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propertysuite.co.nz

**QikBizCRM** | @QikBizNZ  
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**Syngency** | @syngency  
syngency.com

**Vision6** | @vision6  
vision6.com.au

**Workato** | @Workato  
workato.com/xero

**WORK[etc] CRM** | @WORKetc\_support  
worketc.com

**Xact** | @Xactsoftware  
xactsoftware.co.nz

**Xploit** | @xploitapp  
xploit.com

**Zendesk by Cloud Elements** | @CloudElements  
cloud-elements.com

**Zendesk by Zapier**  
zapier.com/zapbook/xero/zendesk

## Custom Integration

**3Bit Solutions**  
3bit.com/xero\_solutions.aspx

**Axis Direct** | @NZAxisDirect  
axisdirect.nz

**BlueHub** | @Blue\_Hub  
bluehub.co.uk

**Custom D** | @customdhq  
customd.com

**Coherent** | @CoherentSoft  
coherent.net

**Databuzz** | @databuzz  
databuzz.com.au

**Defsys** | @defsys  
defsys.com.au

**Digital Fusion**  
teamdf.com

**Dynamic Solutions Ltd**  
dynamic-solutions.co.nz/xero

**EndGame** | @GoEndGame  
end-game.com/xero

**ExcluServ** | @ExcluServ  
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**Foundation Data**  
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**Harmonic New Media** | @harmonicnm  
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**Hashbang** | @hashbangnz  
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**Infopower**  
customintegration.co.nz

**Interlockit.com**  
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**ISOS** | @isos\_uk  
isos.com

**Macbusiness**  
macbusiness.co.nz/xero-integration

**NetEngine** | @Net\_Engine  
netengine.com.au/xero-integrations

**Numernet**  
numernet.com

**nuSoftware** | @nu\_Software  
nusoftware.com

**Open Sauce Systems** | @OpenSauceSystem  
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**Red Arc Systems** | @SystemsArc  
redarc.systems/xero

**Red Jungle Limited** | @redjungle  
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**Sixtree** | @sixtreeau  
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**Smudge** | @smudgeio  
smudge.io

**Southgate Labs** | @SouthgateLabs  
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**Squirrel Business Hub** | @SquirrelCRMHub  
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**Stellarise** | @Stellarise  
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**Syngeri** | @SyngeriTechLtd  
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**The Logic Studio** | @TheLogicStudio  
logicstudio.nz/xero

**Tonic Works**  
tonic.works/#xero

**Trineo** | @trineoldt  
trineo.co.nz

**Trio Technology** | @Trio\_Tech  
triotech.co.nz/xero

**Web Industries**  
webindustries.co.nz

**Zynk**  
zynk.com/solutions/xero-integration/

## Debtor Tracking

**Armatic** | @armaticio  
partners.armatic.io/xero

**Chaser** | @chaser\_hq  
chaserhq.com

**Check Business**  
check-business.co.uk/xero

**CollBox** | @CollBox  
collbox.co

**CreditorWatch** | @creditorwatch  
creditorwatch.com.au

**Debtograph** | @Debtograph  
debtograph.com

**Debtor Daddy** | @debtordaddy  
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**Debtze** | @DebtzeCollect  
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**Funding Gates** | @fundinggates  
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**InvoiceSherpa** | @invoicsherpa  
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**IODM** | @IODM\_Software  
iodm.com.au

**Late Fee Manager** | @LateFeeManager1  
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**Mentio** | @mentiohq  
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paidpromptly.com

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satago.com

**Sky Collect** | @SkyCollect  
skycollect.com

**SMS My Debtors** | @smsmydebtors  
smsmydebtors.com

**Vision6** | @vision6  
vision6.com.au

**XO Cashflow** | @xocashflow  
xocashflow.com/Xero-Integration

## Documents

**Basecone** | @Basecone  
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**Boxkite** | @getboxkite  
getboxkite.com

**DiGA - Xero Excel Reporting** | @BiznizBackbone  
businessbackbone.co.uk

**Evernote by Zapier** | @zapier  
zapier.com

**Formitize** | @Formitize  
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**Google apps for work**  
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**i2B** | @i2B\_Limited  
i2b-online.com

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**Synkle** | @SynkSimple  
synkle.com

**Webrecs** | @Webrecs  
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**Airsquare** | @airsquare  
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**Amazon.com by Stitch Labs** | @StitchLabs  
stitchlabs.com

**Bigcommerce by Carry The One**  
carrytheone.co.uk

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**Checkfront** | @Checkfront  
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**Loaded Commerce by Carry The One**  
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**Magento by OneSaas** | @onesaas  
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**Magento by Unleashed** | @unleashedteam  
unleashedsoftware.com

**Magento by Zapier** | @zapier  
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**Magento Integration (Fooman)** | @foomanNZ  
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**Storbie** | @storbiecommerce  
storbie.com

**Synergy 8** | @SynergyEight  
synergy8.com

**TaxJar** | @TaxJar  
taxjar.com

**TradeGecko** | @tradegecko  
tradegecko.com

**Tradevine** | @TradevineTeam  
tradevine.com

**Veeqo** | @Veeqo  
veeqo.com/integrations/xero

**Vextras - Kiwi** | @vextras  
vextras.com

**Volusion by Vextras** | @vextras  
vextras.com

**Web Widgets**  
websitebuilder.nz

**Website Builder**  
websitebuilder.nz

**WooCommerce**  
onesaas.com

**Zapier** | @zapier  
zapier.com/apps/xero

**Zen Cart by Carry The One**  
carrytheone.co.uk

## Financial Services

**Beyond Merchant Capital** | @beyond\_cap  
beyondmerchantcapital.com.au

**BizFi** | @Bizfinyc  
bizfi.com

**BlueVine** | @BluevineCapital  
bluevine.com

**BodeTree** | @BodeTree  
bodetree.com

**Credi** | @CrediPlatform  
credi.com

**Equifax** | @equifax  
equifax.com

**Everline** | @everline  
everline.com

**Financierey** | @financierey  
financierey.com

**Fundbox** | @fundbox  
fundbox.com

**Fundera** | @fundera  
fundera.com

**Funding Options** | @FundingOptions  
fundingoptions.com

**GetCapital** | @Get\_Capital  
getcapital.com.au

**iwoca** | @iwoca  
iwoca.co.uk/xero

**Kabbage** | @Kabbagelnc  
kabbage.com

**liberis** | @LiberisUK  
liberis.co.uk

**Moula** | @MoulaMoney  
moula.com.au

**OFX**  
xero.com/uk/financial-services/ofx

**Satago** | @satagohq2  
satago.com

**SmartBiz Loans** | @SmartBizLoans  
smartbizloans.com

**Waddle** | @getwaddle  
waddle.com.au

## Inventory

**24SevenOffice** | @24S0Support  
24sevenoffice.com

**ApparelMagic** | @ApparelMagic  
apparelmagic.com

**CIN7** | @Cin7online  
cin7.com

**Current RMS** | @currentrms  
current-rms.com

**DataQlick** | @DataQlick  
dashboardstream.com

**DEAR Inventory** | @DearInventory  
dearsystems.com

**Evopos** | @evoposdms  
evopos.com

**Expandly** | @expandly  
expandly.com

**Farmflo** | @farmflo  
farmflo.com

**Fishbowl** | @fishbowl  
fishbowlinventory.com

**Hike** | @hikepos  
hikeup.com/xero-pos-integration

**Manu Online Ltd** | @ManuOnlineLtd  
manuonline.com/xero

**MRPEasy** | @mrpeasy  
mrpeasy.com

**OrderHarmony** | @orderharmony  
orderharmony.com

**simPRO** | @simprosoftware  
simprogroup.com

**StarShipIt** | @ShipIT  
starshipit.com

**Stitch Labs** | @StitchLabs  
stitchlabs.com

**Stock and Buy** | @StockAndBuy  
stockandbuy.com

**TidyBuild** | @TidyInt  
tidyinternational.com

**TidyStock** | @TidyInt  
tidyinternational.com



**TradeGecko** | @tradegecko  
tradegecko.com

**Unleashed Software** | @unleashedteam  
unleashedsoftware.com



**Veeqo** | @Veeqo  
veeqo.com

**Vend**  
xero.com/uk/marketplace/app/vend

**Viberent** | @viberenthq  
viberenthq.com

**Vinsight** | @VinsightSW  
vinsight.net

## Invoicing &amp; Jobs

**Accelo** | @accelo  
www.accelo.com

**ActionStep** | @Actionstep  
actionstep.com/xero

**Active Collab By Trio** | @Trio\_Tech  
triotech.co.nz

**Acuity Scheduling** | @AcuitySchedulin  
acuityscheduling.com

**AffinityLive** | @affinitylive  
affinitylive.com

**ApparelMagic** | @ApparelMagic  
apparelmagic.com

**ApprovalMax** | @ApprovalMax  
approvalmax.com/xero

**AppsForOps** | @AppsForOps  
appsforops.com

**AroFlo** | @aro\_flo  
aroflo.com

**Ascora** | @ascoraapp  
ascora.com.au

**Autotask by My Accounting Toolbox**  
myaccountingtoolbox.com

**aXcelerate** | @aXcelerate  
axcelerate.com

**B2BGateway** | @B2BGateway  
b2bgateway.net

**BookingBug** | @bookingbug  
bookingbug.com/xero

**briefcase**  
getbriefcase.net

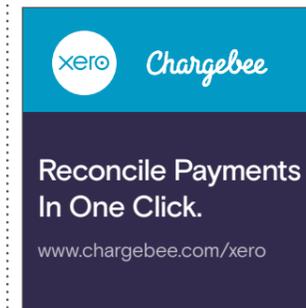
**BriteBiz** | @britebiz  
britebiz.com/xero-crm-integration

**BuilderTREND** | @BuilderTREND  
buildertrend.com/xero

**BuildXact**  
buildxact.com.au

**CarVue** | @CarVue  
carvue.com/xero

**Chargebee** | @chargebee  
chargebee.com/integrations/xero



**CheckVault** | @CheckVault  
checkvault.com.au

**Cliniko** | @Cliniko  
cliniko.com/xero

**Clio** | @goclio  
landing.clio.com/xero

**Co-construct** | @coconstruct  
global.co-construct.com

**commonsku** | @commonsku  
commonsku.com

**Commusoft** | @Commusoft  
commusoft.co.uk

**ConnectWise by Wise-Sync** | @wisesync  
wise-sync.com

**Copper** | @copperproject  
copperproject.com

**Corecon**  
corecon.com

**coreplus** | @intracore  
coreplus.com.au

**CurrentRMS** | @currentrms  
current-rms.com

**Cushion** | @cushionapp  
cushionapp.com

**Dentally** | @DentallyApp  
dentally.co/integrations/xero

**DonkeyBean**  
donkeybean.com

**EMAC** | @EMACsoftware  
emac.com.au

**ePrint MIS** | @eprintmis  
eprintmis.com

**etz Technologies** | @etzTechnologies  
etzpayments.com

**Experico**  
experico.com

**EZ Rent out** | @EZRentOut  
ezrentout.com/xero

**Fergus** | @FergusApp  
fergusapp.com

**Field Aware** | @fieldaware  
fieldaware.com

**Fleetmatics WORK** | @fleetmatics  
fleetmatics.com.au

**Foodstorm** | @FoodStorm  
foodstorm.com

**Formitize** | @Formitize  
formitize.com

**FreshBooks** | @freshbooks  
onesaas.com/integrate/xero

**Friendly manager**  
friendlymanager.com

**GeoOp** | @GeoOp  
geoop.com

**GoProposal** | @GoProposal  
goproposal.com

**Harvest** | @harvest  
getharvest.com

**Houston Medical**  
houstonmedical.net

**i2B** | @i2B\_Limited  
i2b-online.com

**ICOS LIVE** | @iCOSLIVE  
icoslive.com

**inForm** | @getinformapp  
getinform.com

**Intellibook** | @intellibookapp  
intellibook.co

**Invoiced** | @InvoicedApp  
invoiced.com/xero

**invoiceASAP** | @invoiceASAP  
manage.invoiceasap.com/xero

**InvoiceTracker by eBillity** | @eBillity  
invoicetracker.com



**iTrade**  
itrade.net

**JobAdder** | @jobadder  
jobadder.com

**JobPro Central** | @JobProCentral  
jobprocentral.com

**JobReady** | @JobReadyNSW  
jobready.com.au

**Jobsheet** | @jobsheet  
jobsheetapp.com/xero

**Kickserv** | @kickserv  
kickserv.com/xero

**LEAP** | @LEAP4LawFirms  
leap.co.uk

**Loc8** | @Loc8com  
loc8.com



**Manu Online Ltd** | @ManuOnlineLtd  
manuonline.com/xero

**Magnetic** | @magnetichq  
magnetichq.com/xero

**MechanicDesk** | @mechanicdesk  
mechanicdesk.com.au/addon-xero

**Mindbody by QSSConnect** | @QuoteStockSell  
quotestocksell.com

**Minutedock** | @minutedock  
minutedock.com

**Mobileezy** | @MobileezyAust  
mobileezy.com

**MyTrucking** | @MyTrucking  
mytrucking.com/integrations/xero



- NextMinute** | @NextMinuteApp  
nextminute.com
- Okappy** | @ok\_appy  
okappy.com
- Order Space** | @orderspace  
orderspace.com/integrations/xero
- Patchability**  
time.patchability.com
- pay RIGHT AWAY** | @PayRIGHTAWAY  
payrightaway.com.au
- Preno** | @prenoHQ  
prenoHQ.com/xero
- Progressclaim.com** | @progressclaim  
progressclaim.com
- Proposify** | @Proposify  
proposify.com
- ProWorkflow** | @ProWorkflow  
proworkflow.com
- Quotient** | @QuotientApp  
quotientapp.com/integrations/xero

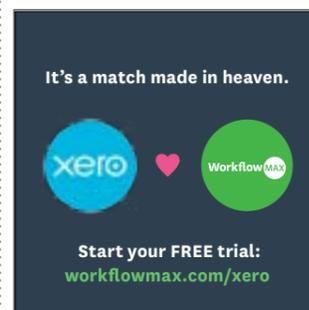


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qwilr.com
- RepairShopr** | @RepairShopr  
repairshopr.com/xero-integration
- Roll** | @rollHQ  
rollHQ.com/xero
- Salesin** | @SalesinApp  
salesin.com/integration/xero
- Senddr** | @senddirect  
senddr.com
- ServiceM8** | @ServiceM8  
servicem8.com
- Simple Salon** | @SimpleSalon  
simplesalon.com/xero
- simPRO** | @simprosoftware  
simprogroup.com
- Smart Reports** | @smartreports  
smartreports.com.au
- SmartTrade** | @SmartTradeSW  
smarttrade.biz
- Streamtime** | @streamtime  
streamtime.net/xero
- StudioNinja**  
help.studioninja.co
- Synchroteam** | @Synchroteam  
synchroteam.com
- Synergist** | @Synergist  
synergist.co.uk
- Syngency** | @syngency  
syngency.com
- The Service Manager** | @theservicemgr  
theservicemanager.com

**TidyBuild** | @TidyInt  
tidyinternational.com



- TidyEnterprise** | @TidyInt  
tidyenterprise.com
- TidyWork** | @TidyInt  
tidywork.com
- Time Tracker by eBillity** | @eBillity  
ebillity.com
- TimeCamp** | @timecamp  
timecamp.com
- Tomahawk / Resbook** | @TomahawkTourism  
tomahawk.co.nz
- Total Synergy** | @totalsynergy  
totalsynergy.com
- Tradify** | @tradifyHQ  
tradifyHQ.com
- Traffic Live**  
deltek.com
- TriggerApp** | @triggerapp  
triggerapp.com/xero
- Trio Technology** | @Trio\_Tech  
triotech.co.nz/xero
- Tsheets** | @tsheets  
tsheets.com/xero
- Union Square** | @unionsquareLtd  
deltek.com
- Vinsight** | @VinsightSW  
vinsight.net
- Vintrace** | @vinx2  
vinx2.com
- vWork** | @vWorkApp  
vworkapp.com
- WHMCS for Xero** | @edgehosting  
edgehosting.uk/whmcs-xero-addon
- Work[etc] CRM** | @WORKetc\_support  
worketc.com/new\_landing/xero
- WorkflowMax** | @WorkflowMax  
workflowmax.com



**Workshop Software** | @workshoponline  
workshopsoftware.com.au

**XEDI** | @xediLtd  
xedi.com

**Manufacturing**

**AroFlo** | @aro\_flo  
aroflo.com

**Tidy Enterprise** | @TidyInt  
tidyenterprise.com



**Other**

- AzX Accounting** | @azxaccounting  
azxaccounting.com/xero
- Acuity Scheduling** | @AcuityScheduling  
acuityscheduling.com
- Ag Profit** | @AgProfitAus  
agprofit.com.au
- Arlo**  
arlo.co
- Arthur Online** | @ArthurProperty  
arthuronline.co.uk
- Avalara** | @avalara  
trustfile.avalara.com
- Backupmybooks** | @backupmybooks  
backupmybooks.com
- BizEquity** | @BizEquity  
bizequity.com/xero
- Boxkite** | @getboxkite  
getboxkite.com
- Business sorter** | @BusinessSorter  
businesssorter.com/xero
- Cloudbusiness** | @CloudBusinessLt  
cloudbusinessllc.com
- CloudDash**  
vesvault.com/partner/xero
- ClubHub** | @ClubHubSSL  
clubhub.co.nz
- Controlc**  
control-c.com/landing-xero
- CoverKit by NZI**  
nzi.co.nz
- Curve** | @imaginecurve  
imaginecurve.com
- Customer Lobby** | @CustomerLobby  
customerlobby.com
- EntryRocket** | @entryrocket  
entryrocket.com
- ePrint MIS** | @eprintmis  
eprintmis.com

- Eventbrite by OneSaas** | @onesaas  
onesaas.com
- Eventbrite by Zapier** | @zapier  
zapier.com
- Expense Check** | @expensecheck  
expensecheck.com.au
- ezyVet** | @ezyvvet  
ezyvvet.com/xero-accounting/
- Farmflo** | @farmflo  
farmflo.com
- Flowrev** | @flowrev  
flowrev.com/xero
- Google Calendar By Zapier** | @zapier  
zapier.com
- Imporex**  
imporex.com.au
- InView**  
inviewapp.com



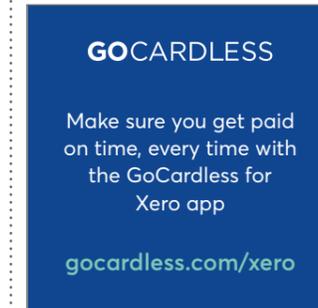
- JobReady** | @JobReadyNSW  
jobready.com.au
- LEAP** | @LEAP4LawFirms  
leap.co.uk
- Lil Regie** | @lilregie  
lilregie.com/xero
- LedgerBackup**  
ledgerbackup.com
- MRPEasy** | @mrpeasy  
mrpeasy.com
- MyFirmsApp** | @MyFirmsApp  
myfirmsapp.com
- Office 365** | @Office365  
xero.com/uk/office-365
- OneSaas** | @onesaas  
onesaas.com
- Onsight** | @Onsight\_App  
onsightapp.com
- OzBiz Solutions** | @OzBizSolutions  
ozbizsolutions.com.au
- PennyPipe** | @PennyPipe  
pennypipe.com/info/xero
- pensionsync** | @pensionsync  
pensionsync.com
- Piesync** | @PieSync  
piesync.com/xero
- PocketRent** | @PocketRent  
pocketrent.com
- PocketSmith** | @PocketSmith  
pocketsmith.com
- Podio by Phases**  
podio.com
- Podio by Zapier** | @zapier  
zapier.com

- Progressclaim.com** | @progressclaim  
progressclaim.com
- PropertyTree** | @PropertyTree  
propertytree.com
- Re-leased** | @re\_leased  
re-leased.com
- Re-View** | @Re\_viewsoftware  
re-view.com
- Real Estate Investar** | @reiaustralia  
realestateinvestar.com.au
- Rerun** | @Rerunapp  
rerunapp.com
- RightSignature** | @RightSignature  
rightsignature.com
- Salesin** | @SalesinApp  
salesin.com/integration/xero
- SAT FXOnline** | @satworldwide  
satfxonline.co.uk
- Sendle** | @sendle  
sendle.com
- Sharesight** | @Sharesight  
sharesight.com/xero
- Sharesight Pro** | @Sharesight  
pro.sharesight.com.au
- Stryke Tax** | @stryketax  
stryke.com.au
- Synergy 8** | @SynergyEight  
synergy8.com
- Tax1099** | @efile1099  
tax1099.com
- Track1099** | @Track\_1099  
track1099.com
- TransferMate** | @TransferMate  
transfermateonline.com
- Vinosmith** | @thevinosmith  
vinosmith.com
- VINX2** | @vinx2  
vinx2.com
- Wise.NET** | @WisenetLRM  
wisenet.co
- Workato** | @Workato  
workato.com/xero
- Workshop Software** | @workshoponline  
workshopsoftware.com.au
- Wufoo by Zapier** | @zapier  
zapier.com
- Zapier** | @zapier  
zapier.com
- Zendesk by Zapier** | @zapier  
zapier.com
- Zenoti** | @ZenotiSoftware  
zenoti.com/xero

**Payments**

- Acuity Scheduling** | @AcuityScheduling  
acuityscheduling.com
- Authorize.Net** | @AuthorizeNet  
reseller.authorize.net
- Bill and Pay** | @BillandPay  
billandpay.com
- Bill.com** | @billcom  
bill.com

- Chargebee** | @chargebee  
chargebee.com/integrations/xero
- Chargify** | @Chargify  
chargify.com/xero
- Checkkeeper** | @Checkkeeper  
checkkeeper.com/xero
- CheckVault** | @CheckVault  
checkvault.com.au
- Debtor Daddy** | @debtor daddy  
debtor daddy.com/xero
- Directli** | @Directli  
directli.co.uk
- DPS Payment Express** | @PaymentExpress  
paymentexpress.co.uk
- EazyCollect** | @eazyCollect  
eazycollect.co.uk
- EzyCollect** | @ezyCollect  
ezycollect.com.au
- eWay** | @eWAY\_  
eway.io
- Ezidebit** | @Ezidebit  
ezidebit.com.au
- GoCardless** | @GoCardless  
gocardless.com



**IntegraPay** | @IntegraPay  
integrapay.com.au



- InvoiceSherpa** | @invoicsherpa  
invoicsherpa.com
- iZettle** | @iZettle  
izettle.com
- Kwanji** | @KwanjiX  
kwanji.com
- Midpoint** | @MidpointLtd  
midpoint.com
- OFX**  
xero.com/uk/financial-services/ofx
- OzForex** | @ozforex  
ozforex.com.au
- Pay RIGHT AWAY** | @PayRIGHTAWAY  
payrightaway.com.au

- Payoneer** | @Payoneer  
register.payoneer.com
- Payment Express** | @PaymentExpress  
paymentexpress.com/xero
- PayPal** | @PayPal  
paypal.com
- PayPal by Zapier** | @zapier  
zapier.com
- PennyPipe** | @PennyPipe  
pennypipe.com/info/xero
- Pin Payments** | @PinPayments  
pin.net.au
- Plooto** | @PlootoInc  
app.plooto.co
- POLi Payments** | @POLiPayments  
polipayments.com
- Receivabl** | @receivabl\_es  
receivabl.es
- Rerun** | @Rerunapp  
rerunapp.com
- SAT FXOnline** | @satworldwide  
satfxonline.co.uk
- Stripe** | @stripe  
stripe.com
- Stripe by Commerce Sync** | @commercesync  
commercesync.com
- Stripe (Canada)** | @stripe  
stripe.com
- Stripe (IE)** | @stripe  
stripe.com
- Square** | @SquareUK  
squareup.com/gb
- Transfer Mate** | @TransferMate  
transfermateonline.com
- TransferWise** | @TransferWise  
transferwise.com
- uCollect** | @ucollect\_biz  
ucollect.biz/xero
- Worldpay**  
business.worldpay.com

**Payroll & HR**

- Automated Data Processing Inc.** | @ADP  
adp.com
- Boomr - Employee Time Clock** | @BoomrApps  
boomr.com
- citrusHR** | @citrusHR  
citrushr.com/xero
- CloudPayroll**  
cloudpayroll.com.au
- New Zealand**  
www.ipayroll.co.nz
- Australia**  
www.cloudpayroll.com.au

- Crystal Payroll**  
crystalpayroll.com
- Deputy** | @deputyapp  
deputy.com
- Employment Hero** | @EmploymentHero  
employmenthero.com
- enableHR** | @enableHR  
enablehr.com.au
- Ento** | @entohq  
ento.com
- ePayroll** | @ePayrollAus  
epayroll.com.au
- Flexitime** | @FlexiTimeTeam  
flexitime.co.nz
- Gpayroll**  
gpayroll.com
- Gusto** | @GustoHQ  
zenpayroll.com
- Happy HR** | @happyhraus  
happyhr.com
- HR Assured** | @HRAssured  
hrassured.com.au
- HR Partner** | @HRPartnerApp  
hrpartner.io
- IMS Payroll**  
imspayroll.co.nz
- Intertec TimePro**  
timesheets.com.au
- iPayroll**  
ipayroll.co.nz
- KeyPay** | @KeyPayApp  
keypay.co.uk



**Microkeeper** | @Microkeeper  
microkeeper.com.au



- MyPAYE** | @MyPAYE  
mypaye.co.uk
- Paychex** | @Paychex  
pages.paychex.com/xero
- Payescape** | @PayescapeUK  
payescape.com

**Payment Evolution** | @payevo  
paymentevolution.com

**PaysOnline** | @paysonline  
paysonline.com.au

**PaySpace** | @PaySpace  
payspace.com



**Simplepay.ca** | @simplepaycanada  
simplepay.ca

**SimplePay.co.za**  
simplepay.co.za

**SimplePay.com.sg**  
simplepay.com.sg

**Smart Payroll** | @smartpayroll  
smartpayroll.com.au

**SurePayroll** | @SurePayroll  
lps.surepayroll.com

**Talenox** | @Talenox  
talenox.com

**Tanda** | @TandaHQ  
tanda.co

**Thankyou Payroll** | @ThankyouPayroll  
thankyoupayroll.co.nz

**The Payroll Site** | @ThePayrollSite  
thepayrollsite.co.uk

**Workforce Guardian** | @workforceguardian  
workforceguardian.com.au

**ZUUS Workforce** | @zuusworkforce  
zuusworkforce.com

**Point of Sale**

**Airpos** | @AirPOS  
airpointofsale.com/xero

**Airsquare** | @airsquare  
airsquare.com

**Bartab** | @airsquare  
tabology.com

**CIN7** | @Cin7online  
cin7.com

**ClickPOS** | @ClickPOS\_Online  
clickpos.com

**Clover by Commerce Sync** | @commercesync  
commercesync.com

**Deputy** | @deputyapp  
deputy.com/gb

**Epos Now** | @EposNow  
eposnow.com

**Evopos** | @evoposdms  
evopos.com

**EZ Rent out** | @EZRentOut  
ezrentout.com/xero

**Hike** | @hikepos  
hikeup.com/xero-pos-integration

**Ikentoo** | @iKentoo  
ikentoo.com

**Imonggo** | @Imonggo  
imonggo.com/partners/xero

**Infinity RMS** | @InfinityRMS  
infinityrms.com

**iZettle** | @iZettle  
izettle.com

**Kounta** | @kounta  
kounta.com

**MINDBODY** | @mindbodyonline  
partner.mindbodyonline.com

**Nobly** | @NoblyPOS  
noblypos.com/xero

**Possboss** | @posbosshq  
posbosshq.com

**Preno** | @prenoHQ  
prenoHQ.com/xero

**Redcat** | @RedCatPOS  
redcat.com.au/xero

**Retail Express** | @RetailExpress01  
retailexpress.com.au

**rPOS by RPG** | @RobotPubGroup  
robotpubgroup.com

**Sapaad** | @SapaadPOS  
sapaad.com/lp/xero

**Shogo**  
shogo.io

**Shopify** | @Shopify  
shopify.com

**Simple Salon** | @SimpleSalon  
simplesalon.com/xero

**Square** | @SquareUK  
squareup.com/gb

**tevalis** | @tevalis\_epos  
website.tevalis.com

**The Good Till Company** | @TheGoodTillCo  
thegoodtill.com

**Tower Systems** | @TowerSystems  
towersystems.com.au

**You'reOnTime** | @YoureOnTime  
youreontime.com/Xero

**Vend** | @vendhq  
vendhq.com

**Zilch Consulting** | @zilchconsulting

**Professional Services**

**AppsForOps** | @AppsForOps  
appsforops.com

**BGL Corporate Solutions** | @BGLdot  
bgldot.com



**BGL Corporate Solutions** | @BGLdot  
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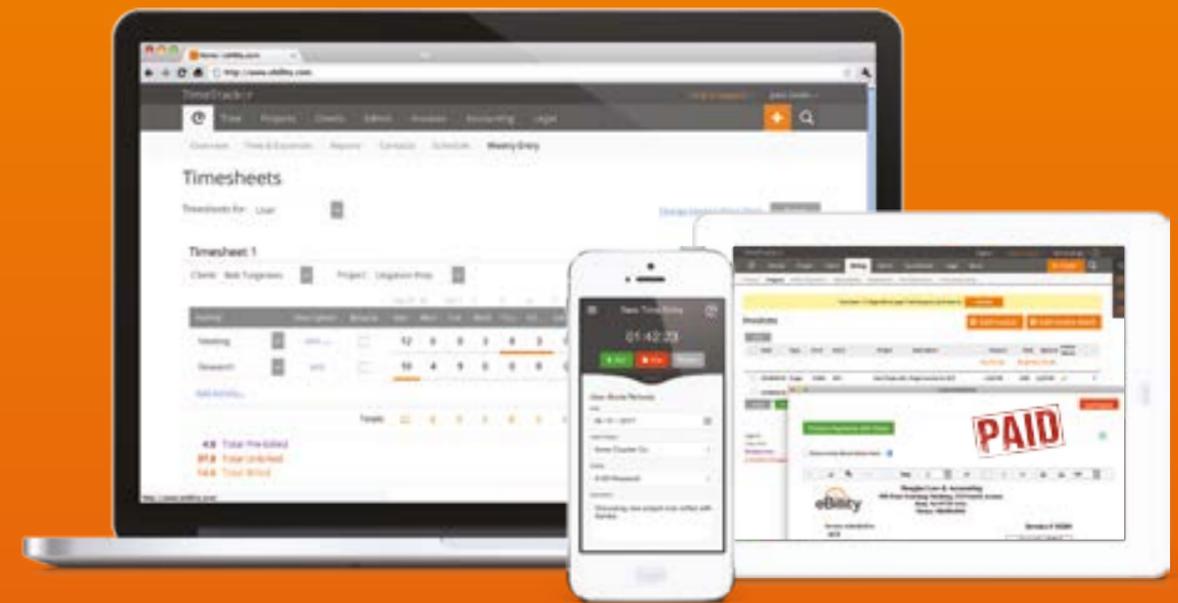
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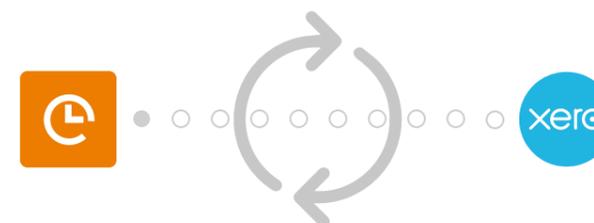
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# GoCardless, have just launched 'down under'

Ambassadors of global bank-to-bank payments, GoCardless, have just launched 'down under'. Now one of the fastest growing apps in the Xero marketplace, GoCardless currently process £5bn worth of transactions across the UK and Europe and have just been named Xero's global preferred Direct Debit provider...



**F**or the first time, accountants and SMBs can collect payments in and from Australia via Xero, thanks to GoCardless' integration with the Australian BECS Direct Debit system.

For Australian businesses, that means the chance to automate invoice payments within Xero, so there's no need to switch systems or spend hours of time on manual reconciliation. With the new integration, payments are automatically reconciled with the relevant invoices marked as paid and the GoCardless fee posted as an expense. Xero users also benefit from added features like error prevention (say goodbye to double entries), as well as low, transparent fees – 1%, capped at A\$3.50, £2 or EUR2.

### Life after GoCardless is sweet for Aussie chocolate wholesaler

Chocolate wholesaler Mörk Chocolate is now using GoCardless in the UK, Europe – and Australia to collect variable payments from its stockists. It started collecting with GoCardless in Europe in 2014 and now all 150 of its European customers pay by GoCardless. It will now be rolling out the payment method for its 450 Australian customers.

"GoCardless has showed us just how much time can be saved on payments admin," says Co-Founder Kiril Shaginov, "– as well as improving our cash flow. We first used it in the UK and we

jumped at the chance to introduce it to our customers here. It allows us to spend more time building relationships with our customers, rather than focusing on the accounts."

While Kiril and team reviewed other Direct Debit systems for their Australian market, they found that these didn't integrate as well with Xero. "GoCardless is Xero's global preferred Direct Debit provider and it shows – the integration is really seamless and intuitive; your accounts are always accurate and up to date without you having to do anything, and automatic reconciliation is a huge time-saver."

### GoCardless & Xero: A strong partnership

The venture into Australia has strengthened GoCardless' partnership with Xero, with them becoming Xero's global preferred payments provider for Direct Debit.

In the words of Edward Berks, EMEA Director, Fintech & Ecosystem at Xero, "Xero and GoCardless share a similar goal: to streamline admin and give businesses more time back to focus on growth. GoCardless for Xero is one of our fastest growing apps in the UK and we're delighted to be able to offer this best-in-class solution for taking Direct Debit payments to our subscribers in Australia, and soon to our users in the rest of the world."

Named Xero's UK App Partner of the Year in 2017, GoCardless now have 8,500 users connected to Xero. This

partnership enables GoCardless to offer additional integration features, such as automatic reconciliation of payments with Xero accounts, saving users hours of time.

A 2018 survey of 736 SMEs taking Direct Debit payments through GoCardless for Xero, 84% said they spent less time chasing invoices and 74% spent less time on reconciliation; while 80% said their cash flow had improved and 78% said their business' average debtor days had reduced.

GoCardless CEO & Founder, Hiroki Takeuchi commented: "Our partnership with Xero in the UK has allowed us to bring our automatic payment solution into the billing workflows of thousands of small businesses, solving their cash flow challenges and taking away the pain of payment reconciliation. We're thrilled to be taking our partnership to the next level as Xero's global preferred payment solution for Direct Debit, and look forward to bringing our solution to Xero accountants and their small business customers around the world, starting with Australia."

FIND OUT MORE...

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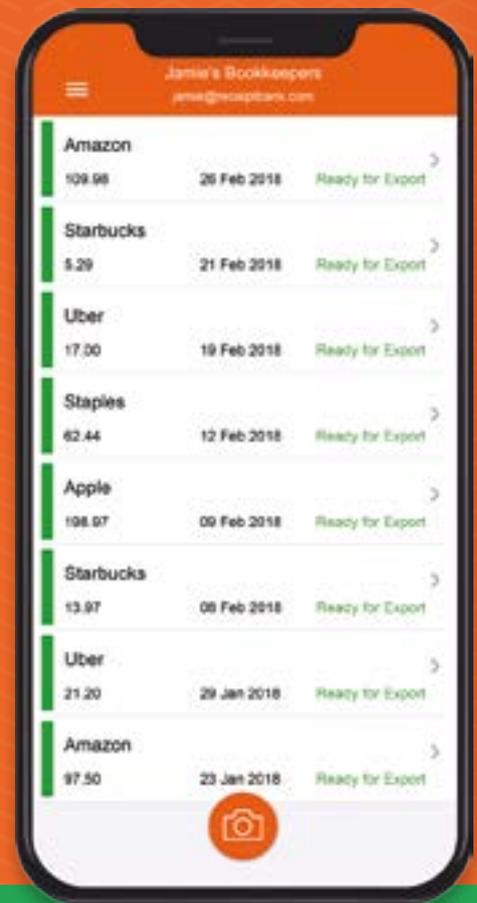
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