



Bring in the Experts: Apps for Financial Advisors

FINANCE REPORT

ACCOUNT
REPORT

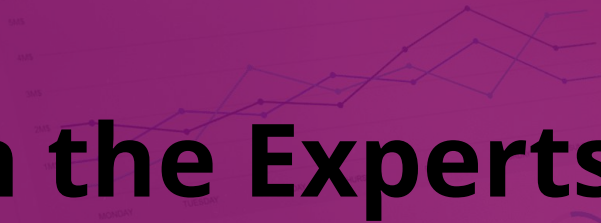
DASHBOARD

INCOME

OUT GOING

DASHBOARD > INCOME

DAILY WEEKLY MONTHLY



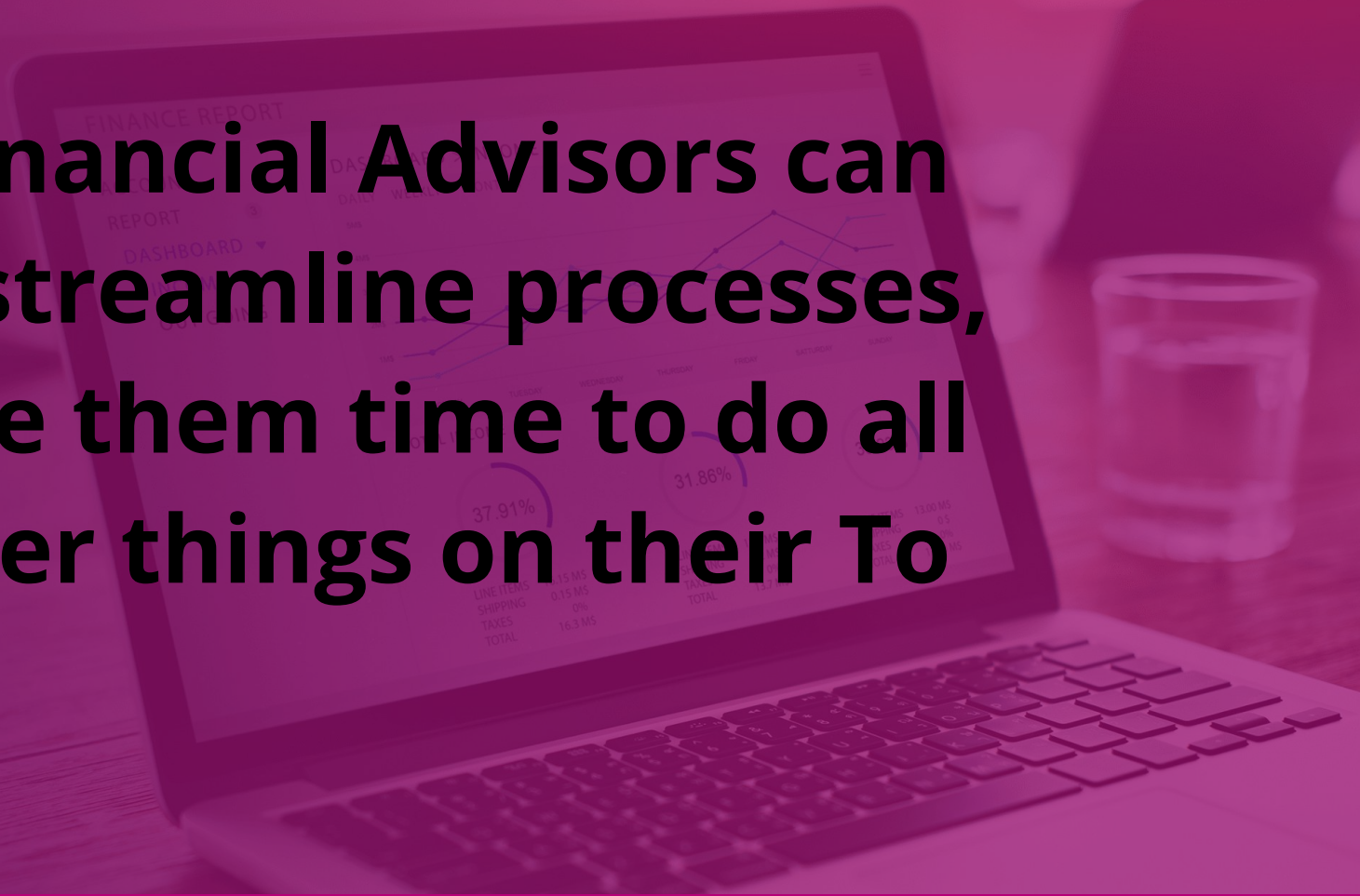
TOTAL INCOME

LINE ITEMS	16.15 MS
SHIPPING	0.15 MS
TAXES	0%
TOTAL	16.3 MS

LINE ITEMS	13.5 MS
SHIPPING	0.2 MS
TAXES	0%
TOTAL	13.7 MS

LINE ITEMS	30.22%
SHIPPING	0%
TAXES	13.00 MS
TOTAL	

Apps Financial Advisors can use to streamline processes, and give them time to do all the other things on their To Do list





Heather Smith

Hype Girl for Accounting Apps

@HeatherSmithAU

- Australia, England, Singapore, Canada
- Runs a modern 100% practice (out of her hand bag)
- FCA, FCCA, FICB
- Written 9 business books
- Facilitate Accounting, Innovation and Technology Discussion Group since 2015
- Host of Cloud Stories podcast since 2015
- Accounting Apps newsletter: HeatherSmithAU.com
- USA's Accounting Today list of 21 people helping shape (and reshape) the accounting industry in 2020 and beyond.

HeatherSmithAU.com

About today's speaker

Heather Smith



Heather Smith

Hype Girl for Accounting Apps

- Winner ACCA ASEAN Advocacy Award
- Host of ACCA The Practice Room
- ACCA SME Global Forum + ACCA Technology Global Forum

Contributed to the following Professional Insight Whitepapers

- Careers In Small And Medium Sized Accountancy Practices (Smpps) ACCA CAANZ
- The digital accountant: Digital skills in a transformed world ACCA
- Responsible SMP Pacesetters ACCA
- The passionate practitioner: Developing the digitalised small and medium practice ACCA
- The Business Data Insights Playbook ACCA CAANZ

HeatherSmithAU.com

Accounting
Apps
Newsletter
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CLOUD
STORIES



Heather Smith



HEATHER
@
ANISE



Doing business is better with the right apps

Find and connect apps to level up your business with Xero



Popular app categories

- Payroll HR
- Invoicing and jobs
- Payments
- Inventory
- Construction & trades
- Time tracking
- CRM
- Reporting

Staff picks

See all >

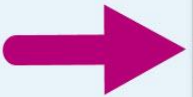
Accountant tools, Practice manager, Reporting

Time tracking

Payroll HR, Reporting

Invoicing and jobs

- Accounting
- Agriculture
- Automotive
- Construction & trades
- Education
- Franchise
- Health
- Hospitality
- Manufacturing
- Not for profit
- Professional services**
- Property & realty
- Retail
- Tourism



Doing business is better with the right apps

connect apps to level up your business with Xero

Search for apps, industries, tasks, departments...



app categories

- Payroll HR
- Invoicing and jobs
- Payments
- Inventory
- Construction & trades
- Time tracking
- CRM
- Reporting

Staff picks

[See all >](#)



- Accountant tools
- Bills and expenses
- CRM
- Conversions
- Custom integration
- Debtor tracking
- Documents
- Ecommerce
- Financial services
- Inventory
- Invoicing and jobs**
- Other
- Payments
- Payroll HR
- Point of sale
- Practice manager
- Reporting
- Time tracking
- Xero HQ apps

Doing business is better with the right apps

Find and connect apps to level up your business with Xero



Popular app categories

- Payroll HR
- Invoicing and jobs**
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Staff picks

See all >

Accountant tools, Practice manager, Reporting

Time tracking

Payroll HR, Reporting

Invoicing and jobs

Receipts

Accurate timely data

Active bank feeds

Optical Character Recognition (OCR) solution feeding into online accounting solution Xero QBO or MYOB

Sustainable & Paperless

Datamolino

Dext Prepare (formally known as Receipt Bank)

EzzyBills

LightYear

MMC Receipts



We're unique. And these aren't mere words.
Features with exceptional ease, so you get back to what needs you more.



Processing Time < 5 minutes

'Capture receipts', send in a way that comforts (app, web or email), see the data get updated in real time.



Data Precision

Scan & update with highest accuracy using superlative AI, supported with human checks.



Multi Currency

Capture receipts in any currency without bugs or barriers.



Instant Pushing to Accounting Software

Scan, Send & you're done. You'll have accurate data pushing into Accounting Software



Fixed Monthly Plan

Invest in a plan that doesn't escalate charges for unlimited captures & users.



Unlimited Receipts

Upload any number of receipts without the panic of an upper cap.



Unlimited Users

Any number of users can be added in one entity without limitations.



Unlimited Cloud Storage

Store as many records as you need on the cloud with no storage limit restrictions.



Flexible Data Capture

JPEG, PDF & more! Convert the extracted data in any file type you deem fit.



Multi level Approvals

Set up multiple stages of approval to check if the captured data qualifies to be pushed ahead.

Book a Demo



XBert

- AI Audit with process and
task automation

T



<p>WEEKLY EARN RATE</p> <p>\$23,050</p> <p>TRENDING ↑</p>	<p>WEEKLY BURN RATE</p> <p>\$13,420</p> <p>TRENDING ↑</p>	<p>TOTAL BALANCE IN BANK ACCOUNTS</p> <p>\$189,801</p> <p>TRENDING →</p>	<p>TOTAL BALANCE ON CREDIT CARDS</p> <p>\$-5,800</p> <p>TRENDING ↑</p>	<p>LARGEST INCOME IN 90 DAYS</p> <p>49,420</p> <p>ACME Construction Industries Group</p>
<p>INCOMING CASH</p> <p>\$125,250</p> <p>From Xero bank feeds on or after the 21 December</p>	<p>OUT OF CASH IN</p> <p>99 DAYS</p> <p>Your cash balance is \$189,801 and you are burning \$1,917 per day</p>	<p>UNRECONCILED AMOUNT</p> <p>\$13,420</p> <p>From XERO bank feeds on & after 22 MAY 2019</p>	<p>CHASE OVERDUE</p> <p>\$13,420</p> <p>Total owed \$67,020</p>	<p>LARGEST EXPENSE IN 90 DAYS</p> <p>\$12,680</p> <p>Outside of wages and salaries is Jenkins Equipment hire</p>
<p>THIS MONTHS PROFIT</p> <p>\$19,520</p> <p>TRENDING ↑</p>	<p>CURRENT ATO LIABILITIES</p> <p>\$11,594</p> <p>Current as of today</p>	<p>FINANCIAL YTD P&L</p> <p>\$143,620</p> <p>TRENDING ↑</p>	<p>GST</p> <p>\$49,420</p> <p>Quarter 2 running balance due 21 JAN 2020</p>	<p>RECURRING MONTHLY SPEND</p> <p>\$9,875</p> <p>Total recurring spend from 22 Sep 2019 to today</p>

CRM

Make keeping track of sales opportunities and contacts a sync

Filter by industry

Professional services




CRM
Capsule CRM
★★★★★ 63
A simple online CRM used by thousands of businesses worldwide. Capsule integrates seamlessly with Xero to provide a complete picture of your customers.



CRM, Invoicing and jobs
HubSpot CRM integration
★★★★★ 37
Xero is collaborating with HubSpot, a CRM, online marketing, sales and customer service growth platform to deliver the best end-to-end customer journey possible.



CRM, Invoicing and jobs
Accelo
★★★★★ 13
Accelo's business automation platform syncs directly with Xero to help Business Advisors and their Professional Service clients improve profitability and streamline operations.




CRM, Invoicing and jobs
Dubsado
★★★★★ 1
Business management platform with the tools to help build lasting relationships with your customers and streamline your projects from start to finish.



CRM, Practice manager
Exsalerate
★★★★★ 42
A powerful sales and account management tool to win and retain more business that's deeply integrated with Xero.




CRM
Microsoft Outlook
★★★★★ 6
Xero and Microsoft collaborate to help you spend less time looking for the right contact and more time in your business.




CRM
Google Contacts
★★★★★ 5
Xero and Google Contacts collaborate to help you spend less time looking for the right contact and more time in your business.



CRM, Invoicing and jobs
Pylon
★★★★★ 1
Solar design software for fast-growing solar businesses. Create high resolution solar sales proposals in under 2 minutes.




CRM, Invoicing and jobs
Luxie Tech for monday.com
Connect your Work OS to Xero. Avoid double handling data, entry errors and more.



CRM, Invoicing and jobs
Inbound Accounts
Integrate HubSpot and Xero to create invoices automatically from HubSpot and view Xero invoice details in HubSpot and much more. Plus custom options.



Bills and expenses, CRM
Splynx
WISP billing and network management platform created for Internet service providers and network administrators.



CRM, Invoicing and jobs
TwoCanConnect
Two Way Integration and Sync with Salesforce. Sync Contacts, Invoices, Products, Payments and more.

Filters (3)

Data

Visualization

Undo

Export

Color: Display options

Choose chart type

Chart selection icons: Bar chart, Line chart, Area chart, Pie chart, Donut chart, and a grid icon.

Configure bar chart

Displaying:

Activity assigned to

Activity type

measured by

Count of Activities

Available properties to display:

You have displayed all available properties

Get more properties to display in the [Data step](#).

Legend: Note (orange), Call (teal), Task (purple), Meeting (yellow), Email sent to contact (pink)




ACTIVITY ASSIGNED TO	NOTE	CALL	TASK	MEETING	EMAIL SENT TO CONTACT
Brian Ga...	34	29	27	20	
Loren Sc...	19	7	10	53	

Help

Goal 1: Grow Customers By 25%

Trello Tip: Set S. M. A. R. T Goals (Click for more info)

Goal Stakeholders




Current Progress Towards "Grow Customers By 25%"



Launch customer referral email program.

🕒 1 Feb 2019




Trello Tip: Cards can summarize specific projects and efforts that your team is working on to reach the goal.

Goal 2: Reduce Office Supply Costs By 15%

Trello Tip: Card labels! What do they mean? (Click for more info)

Goal Stakeholders




Current Progress Towards "Reduce Office Supply \$\$ By 15%




Reduce total team printing volume by 20%



Negotiate loyalty discount with supplier for new fiscal year



Goal Template

Trello Tip: Keep a list "template" that you can copy and rename for each new goal.

Goal Stakeholders

Current Progress Towards Goal


Trello Tip: Try these 5 team-building exercises for setting goals! (Click for more info)

🔗 1

Done (Q1 2019)

Trello Tip: Put finished projects and closed goals here.

Hire 5 new people for 2019!



Done (Q4 2018)

Trello Tip: Create new "Done" lists for each quarter to build a history of accomplished goals.

Newsletters



mailchimp

Mailchimp Recommends

Premium

Advanced features for pros who need more customization.

Starts at
NZ\$ **483**
/month*

[Buy Now](#)

*Overages apply if contact or email send limit is exceeded. [Learn more](#)

Everything in Standard, plus:

- ✓ [Advanced Segmentation](#)
- ✓ [Multivariate Testing](#)
- ✓ [Comparative Reporting](#)
- ✓ [Unlimited Seats & Role-Based Access](#)
- ✓ [Phone & Priority Support](#)

[About Premium](#)

Monthly email sends: 15x plan's contact limit.

Standard

Data-driven automation and optimization tools for businesses that want to grow faster.

Starts at
NZ\$ **27**
/month*

[Buy Now](#)

*Overages apply if contact or email send limit is exceeded. [Learn more](#)

Everything in Essentials, plus:

- ✓ [Customer Journey Builder + Branching Points](#)
- ✓ [Send Time Optimization](#)
- ✓ [Behavioral Targeting](#)
- ✓ [Custom Templates](#)
- ✓ [Dynamic Content](#)

[About Standard](#)

Monthly email sends: 12x plan's contact limit.

Essentials

Great for email-only senders who want around-the-clock support.

Starts at
NZ\$ **17**
/month*

[Buy Now](#)

*Overages apply if contact or email send limit is exceeded. [Learn more](#)

Everything in Free, plus:

- ✓ [Email & Landing Page Templates](#)
- ✓ [Customer Journey Builder](#)
- ✓ [Custom Branding](#)
- ✓ [A/B Testing](#)
- ✓ [24/7 Email & Chat Support](#)

[About Essentials](#)

Monthly email sends: 10x plan's contact limit.

Free

All the multi-channel tools you need to build your business and grow your audience.

NZ\$ **0**
/month*

[Sign Up Free](#)

*Sending will be paused if contact or email send limit is exceeded. [Learn more](#)

Everything you get with Free:

- ✓ [Marketing CRM](#)
- ✓ [Creative Assistant](#)
- ✓ [Website Builder](#)
- ✓ [Mailchimp Domain](#)
- ✓ [Forms & Landing Pages](#)

[About Free](#)

Monthly email send limit is 10,000 sends (daily limit of 2,000)

Connector Tools

+ Create Zap












- Dashboard
- Zaps
- Transfers
- My Apps
- Zap History
- Explore
- Get Help

Create your own workflow

Know exactly what you want to build? Select the apps you want to connect to start your custom setup.

Connect this app... with this one!

Recommended workflows for you

- 
Create Xero invoices for new Stripe payments
 Stripe (Beta) + Xero [Try it](#)
- 
Send Gmail messages when new payments are received in Xero
 Xero + Gmail [Try it](#)
- 
Create Xero invoices for new WooCommerce orders
 WooCommerce + Xero [Try it](#)
- 
Create new Xero invoices for new PayPal sales
 PayPal + Xero [Try it](#)
- 
Get a summary of new payments from Xero delivered to you via Slack daily, weekly or monthly
 Xero + Digest by Zapier + Slack [Try it](#)
- 
Add new Mailchimp subscribers from new contacts in Xero
 Xero + Mailchimp [Try it](#)
- 
Create Xero invoices when new Pipedrive deals reach certain stages
 Pipedrive + Xero [Try it](#)
- 
Add new Keap Max Classic invoices to Xero as invoices
 Keap Max Classic + Xero [Try it](#)
- 
Create Xero invoices for new Shopify paid orders
 Shopify + Xero [Try it](#)
- 
Get Slack alert messages for new Xero invoices
 Xero + Slack [Try it](#)
- 
Get a digest of new Xero sales invoices sent to your Gmail on a daily, weekly, or monthly schedule
[Try it](#)

Documentation Storage

Everything you need in one place.

One source of truth

Templates & edit documents

Connect with Xero

Collaborate with clients

Sign digitally

Manage emails & tasks

Manage, edit, share
& sign documents
- **your way.**

Download info pack

Grab a demo

eSigning



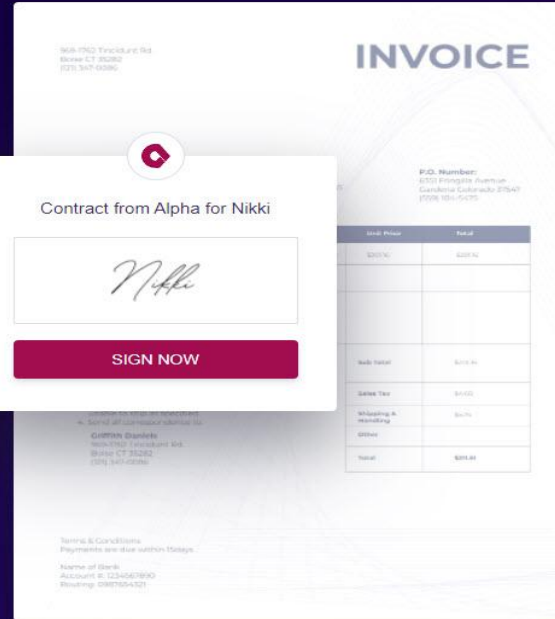
Electronic signatures
Australia's #1 eSignature solution



Identity verification
Powered by Stripe & FrankieOne

eSignatures by Australia's leading provider

Lower your costs, improve engagement and elevate customer satisfaction with Annature - Australia's leading digital signature provider, purpose built for all industries.

[START 7-DAY FREE TRIAL](#)[REQUEST A DEMO](#)

The image shows a white invoice and a contract overlay on a dark blue background. The invoice is titled "INVOICE" and includes a table with columns "Item Price" and "Total". The contract overlay is titled "Contract from Alpha for Nikki" and features a signature box with a handwritten signature and a "SIGN NOW" button.

Item Price	Total
\$200.00	\$200.00
Sub Total	\$200.00
GST 15%	\$30.00
Shipping & handling	\$0.00
Other	\$0.00
Total	\$230.00

Contract from Alpha for Nikki

Nikki

[SIGN NOW](#)



BOMA Marketing



If you hate marketing you'll love BOMA

The digital marketing toolkit and content library for busy accountants and bookkeepers.

[Start Your Free Trial](#)[Book a Demo](#)

14 DAY FREE TRIAL
NO CREDIT CARD REQUIRED

All your digital marketing channels in one platform

With a few clicks, you can easily create your own content, or use articles from BOMA's huge content library, and share it via email, social media channels and your website. Plus free image library, lead capture forms, social ads and more.



FILTER CONTENT

LIBRARIES

All Libraries

Global Categories

- General
- Management & Strategy
- People
- Sales & Marketing
- Tax
- Tech

SORT

Last Created

Content Library



Review your expenses – and save yourself money

Need to rein in your expenses? We'll review your current costs, find the expenses that could be cut.

Management & Strategy

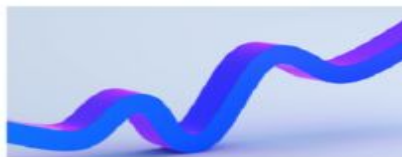
Tax



Is your cost of sales affecting your gross profit?

Is your cost of goods sold (COGS) impacting your gross profit?

Management & Strategy



Understanding your revenue drivers

How well do you understand your revenue drivers?

Management & Strategy

Sales & Marketing



Can companies claim home office expenses?

Sole traders using home offices for business have long been able to claim deductions for home office expenses.

Tax

- Home
- Your projects
- Templates
- Shared with you
- Trash
- Team
 - Heather Smith's team
 - Invite members
- Tools
 - Discover apps
 - Brand Kit
 - Content Planner
 - Starred
 - Community Chat

What will you design?

Custom size Upload

Search your content or Canva's

- For you
- Presentations
- Social media
- Video
- Print products
- Marketing
- Office
- More

You might want to try...

Recent designs

Home

Filters

Clear all (4)

Category

 Instagram Post (50) Facebook Post (19) Poster (Portrait) (18) Your Story (51) Resume (31) Presentation (16:9) (18)

+ View more

Style

 Professional (87) Modern (110) Corporate (80) Minimalist (49) Simple (31) Geometric (22)

+ View more

Theme

 Finance (85) Financial (78)

financial advisor

87 templates



- HS Heather Smith's team Pro • 8.2
- Home
- Your projects
- Templates
- Shared with you
- Trash
- Team
- Heather Smith's team
- Invite members
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- Discover apps
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What will you design?

Custom size Upload

Search your content or Canva's

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- Presentations
- Social media
- Video
- Print products
- Marketing
- Office
- More

You might want to try...

- Video
- Presentation (16:9)
- Poster (Portrait)
- Resume
- Logo
- Instagram Post
- Brochure
- Report

Recent designs

- Tropical Innovation Festival Your Story
- DiviPay Instagram Post
- Think Instagram Post
- Advisory Instagram Post
- 2 6 KPIs Every Nonprofit Organisation... w/c 24.4.22 Instagram Post
- MAD WEALTH CREW Instagram Post

What to look for when choosing an App

- Accessibility of data during and at the end of the subscription;
- Alternative options in the market.
- Approved partnerships;
- Availability (24/7, public holidays) + quality of support ;
- Capacity to grow and shrink with the business;
- Cost - implementation & ongoing;
- Feature set;
- Future feature timeline;
- Future learning curve for new staff
- Integration options;
- Integration with Accounting platform;
- Integration offered with other solutions;
- Minimise human errors;
- Peer reviews;
- Pricing;
- Offboarding process;
- Onboarding support;
- Relationship with clients;
- Reporting and analytical options;
- Security over data;
- Vision of the solution.



Resources

- HeatherSmithAU.com
- Xero for Dummies [book]
- Apps.Xero.com
- Apps.Intuit.com
- www.myob.com/au/apps

Accounting
Apps
Newsletter
HeatherSmithAU.com

CLOUD
STORIES



Heather Smith

Apps for Financial Advisors

