



Expert guide

Moving to the cloud?

A tech stack playbook for accountants & bookkeepers



Written by **Will Farnell**, Founder of Farnell Clarke Accountants in Norwich, UK. Cloud Accounting pioneer and advocate, speaker, consultant and now author of 'The Digital Firm'.

 [linkedin.com/in/willfarnell](https://www.linkedin.com/in/willfarnell)

 twitter.com/farnellclarke

There's a lot of great reasons to start a cloud firm, or move your firm to the cloud:

- Great Service - provide SME clients the same service & real time advice that large businesses with greater resources can access.
- Best Team - attract & retain quality team members.
- More Competitive - compete with larger firms to get big business work.
- Mitigate Risk - protect against the commoditisation of compliance work.
- Get Back Time - streamline processes to save time and greatly improve efficiencies.



Tech has a number of huge benefits, it can automate repetitive tasks, minimise double handling and reduce administration costs. The tools available have built in alerts to help you quickly stay across the most important events, and when you compare your tools to a fulltime employee it's night & day

All these benefits give you and your team more time to:

- Focus on growth opportunities
- Build better relationships with clients
- Spend time reviewing your invoicing and engagements for scope creep
- Invest in marketing and attract new clients

However, there are a lot of different tech tools out there and it can be overwhelming. Where to start? What tools are there to look at. As the founder of Farnell Clarke Accountants I've gone through this myself, and now by founding App Advisory Plus I'm helping to guide other firms on selecting the best tools.

To help you get started, and give you an idea of what I recommend, I've put together the following for you. On the subsequent pages you'll find my recommendations broken down into sections based on the different types of tools. Not just that, but I've outlined the advantages of each type of tool and the specific ones I recommend - I've even highlighted the ones that I use in red for you.

Proposal and Engagement

Practice Ignition

- Easy to access service agreement with payments sorted
- e-Signature
- Scope Creep Management
- Templated engagement - consistent messaging & branding
- Integrates with client database & CRM
- Triggers workflow



General Ledger

Xero / QBO / Sage

- Single Ledger - client & accountant in the same file
- Bank feeds
- Mobile app
- Payroll automation
- Source document storage



Workflow & Practice Management

Karbon / XPM / AccountancyManager / Senta / Glide / Pixie

- Single source of truth for work and client information
- Integrates with engagement tool
- Templated processes with workflow automation
- Timesheets and job budgets
- Communicate better with staff and clients



Workpapers and Tax Filing

Xero / IRIS / Silverfin / TaxCalc / TaxFiler

- Integrates with ledger software
- Electronic sharing & file uploads
- Internal review and query process
- Manager sign off
- Client query capabilities



Debtor Management

Practice Ignition / Satago / Chaser

- Automatic payment on your terms
- Multiple payment methods - credit card, direct debit, etc
- Auto reconciliation of payment
- Integrates with firm ledger
- Chase unpaid invoices automatically



AML

IRIS / Xama / Senta / TaxCalc / AccountancyManager

- Automate identity verification and AML checks
- Company checks
- Integrate with workflow and practice management



Document Management

IRIS / SmartVault / MyDocSafe

- Client portal
- Share documents securely with clients
- e-Signature
- Integrations to general ledger and tax filing



CRM

HubSpot / ActiveCampaign

- Lead tracker
- Contact management
- Marketing & newsletter automation
- Marketing analytics
- Integrates with client database



Integration Tools

Zapier

- Save time by automating repetitive tasks
- Maintain data integrity across multiple systems



Internal messaging

Karbon

- @ mentions on emails, tasks and notes to keep all client and job related communication in one place, with an instant messaging feel.

Teams / Slack

- More suited to internal conversations that are not client or job related



KARBON



Microsoft Teams



slack

Payroll

BrightPay

- Payroll bureau
- Push wage journals back to general ledger
- Export wage payments for payment management system
- Pension integrations
- Employee self-service documents, and leave management

 brightpay

Payment management

Telleroo

- Integrate your general ledger and payroll software
- Approval process for payments
- Pay authorised bills and salaries on behalf of your client

telleroo

Payables

AutoEntry / Dext / Lightyear

- Automatic data extraction
- Integrates with general ledger
- Attaches receipt image to transaction
- Mobile app

 AutoEntry **Dext** Lightyear 

Expense Claiming

Expensify / Pleo / Soldo

- Expense cards
- Expense rules
- Integration to general ledger

 Expensify  Pleo  soldo

Approval Automation

ApprovalMax / Lightyear

- Multi-level approval workflows
- Integration with general ledger
- PO matching

 ApprovalMax Lightyear 

Capital Advisory

Capitalise

- Support clients with financing requirements
- Provide funding options from 100+ lenders
- Access specialist funding support
- Integrate with general ledger

capitalise

Cashflow & Reporting

Spotlight / Fathom / Float / Futrli

- Integrates with general ledger
- Cashflow forecasting
- What-if scenarios
- Business performance snapshot
- Budget vs actual reporting
- KPI monitoring & alerts
- Management & board reporting
- Consolidated reports



How **App Advisory Plus** helps accounting firms (and their clients) to choose and implement the right software.

- Search our independent App Directory packed with apps integrated to cloud accounting platforms
- Use our free App Stack builder to find and create combinations of apps that work well, then create reports with pre-populated content to help present your recommendations to clients
- Partner with us to offer expert App Advisory services to your clients or get support for your in-house Systems Advisory team
- Automate processes and maintain data integrity across multiple systems with our certified expert Zapier consultancy

Find out more

<https://appadvisoryplus.com/>



**App
Advisory
Plus**



91%

of our customers spend less time
creating proposals and chasing
signatures and payments

87%

were able to cancel other
software subscriptions

80%

have fewer (or no) unpaid
invoices at any given time

**And the majority of Practice Ignition
customers are closing more and bigger deals...**

To find out more

[Start 14 Day Free Trial](#)