

TAX TALKS

Australia's Tax News Podcast - The Podcast for Australian Tax Professionals

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245 | Peripheral Apps for Accountants

Peripheral apps for accountants – not our greatest choice for an episode title – but we just couldn't think of a better way to describe what this episode is about.

Peripheral Apps for Accountants

In the last episode we looked at the core of your app ecosystem – what apps should you have right in the middle of your accounting firm.

In this episode we look at what apps you would put around this core for your accounting practice. Amy Holdsworth and Ian Walker of Clarity Street will try and give you an answer to this question.

Here is what we learned but please listen in as Amy and Ian explain this much better than we ever could.

To listen while you drive, walk or work, just access the episode through a free podcast app on your mobile phone.

Apps

Here is a quick overview of the apps we go through in this episode.

1 – [Practice Protect](#)

Offshore providers of accounting services like TOA use Practice Protect to ensure data security, ie. they recommend you subscribing and paying for it. But it often makes sense even when you don't offshore.

2 – [Practice Ignition](#)

Practice Ignition allows you to automate your engagement letters and then collect automatic payments

3 – [Office360](#) | [Google](#) | [Zoom](#)

Just some of the options you have to communicate. The challenge is to streamline this communication within your software.

4 – [Happy HR](#) | [HR Central](#)

HR is an area most accounting practices overlook. These apps cover legal compliance as well as performance management.

5 – [Receipt Bank](#) | [Hubdoc](#)

Hubdoc now comes free with Xero and hence will probably grow with time. At the moment Receipt Bank has more features. Yes, this might change in time but Xero doesn't have a great track record developing the apps they buy. They tend to just buy and forget.

6 – [TOA Global](#)

TOA Global is the largest offshoring provider for Australian accountants. Please listen to ep 242 for more insights.

7 – [Simple Fund 360](#) | [Class](#)

SMSFs run on stand-alone solutions in most accounting practices, so are not well integrated with the rest of the app stack within a practice.

8 – [CAS 360](#) | [NowInfinity](#)

CAS 360 has been around much longer but NowInfinity grew market share due to price. However – and this is a personal view – the user experience on NowInfinity is quite poor.

9 – [SuiteFiles](#) | [FYI Docs](#)

These are document management systems, not to be confused with pure document storage like Google Drive or Dropbox.

10 – [Spotlight](#) | [Clarity](#) | [Fathom](#)

Management reporting is usually the last thing that gets streamlined. Most accountants start with accounting software and receipt management and then slowly venture onto new territory. When that new territory includes management reporting, then Fathom, Clarity and Spotlight come in.

11 – [Adobe Sign](#) | [Docu Sign](#)

Some signatures you can collect through software you might already use (Xero, BGL, Practice Ignition). But if you need something signed not covered by a current software, then you need an additional e-signature solution.

The two most common solutions in Australia are Adobe Sign and DocuSign. We use SecuredSigning – no connection apart from us using them – definitely not a sponsored link – since you can sign 5 documents for free each month without a contract.

12 – [Xero Workpapers](#)

Xero Workpapers allows you to keep all your queries in one spot.

13 – [GreatSoft](#)

GreatSoft is for multidisciplinary firms.

14 – [Zapier](#)

Zapier is a cloud integrator's last resort. When you don't have a native integration, but need two apps to talk to each other, then you would use Zapier.

15 – [Knowledge Shop](#)

Knowledge shop is the place to get your technical questions answered and your tax training done. There are others but this is the one Clarity Street discusses in this episode.

16 – [Slack](#)

Slack is an internal communication tool. Other options are Zoom, Office365 or Microsoft teams.

So this is a quick overview of recommended peripheral apps for accountants. Please listen in as Amy and Ian discuss this in a lot more details and share great insights.

MORE

[Core Apps for Accountants](#)

[Insights of an Offshoring Provider](#)

[Marketing Hacks](#)

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