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Easing your workload
How to automate the paperwork

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Accountancy, tax, payroll and practice management software

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Your presenters

Joe Moore
Content Marketing Executive

Keith Millar
Sales Executive

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Recording   Email   Handouts   Questions

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Agenda

- Automation of data collection with Dext Prepare
- Improving productivity through integration
- See the software in action
- Overcoming barriers to boost productivity
- Questions & answers

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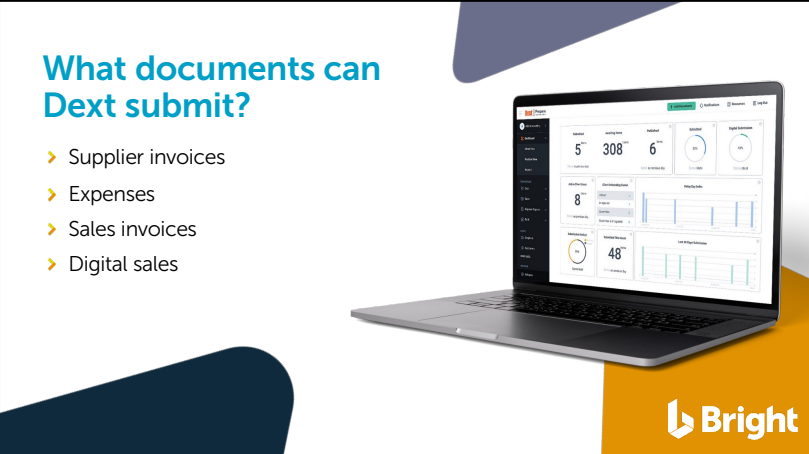How can you improve productivity using automation?

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Automation

Collection and input of client data
Time-consuming and tedious

Unmanageable paperwork and receipts
Unorganised paperwork

VAT-return services
Improving the pre-accounting processes

Dext Prepare
Use software to automate paperwork
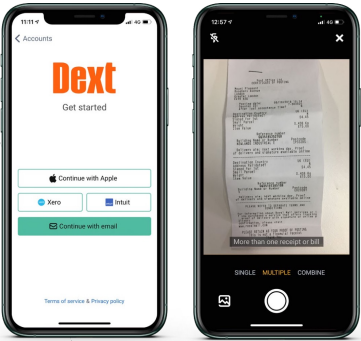
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What documents can Dext submit?

- Supplier invoices
- Expenses
- Sales invoices
- Digital sales

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How do you submit documents?

> Dext Prepare mobile app
> Email
> Drag and drop multiple PDFs

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Dext

99%	accuracy
20	million documents
30	seconds
65%	take 8 seconds

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Automation

More automation with supplier & customer rules

- Category
- Invoice due date
- Tax rate
- Payment method
- Paid/Unpaid status
- Description
- Currency

Dext offers **Smart Split**
- Split a receipt into line items
- Percentage split
- Fixed amounts

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How else can Dext improve productivity?

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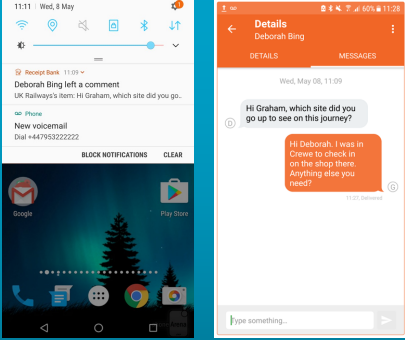## Slide 14

Communication

Instant item messaging
- Direct message
- Get further clarification

Tracking information
- Time stamps
- Keep track

Push notifications
- Alerts received on their phone
- 7 times more likely to be opened

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Slide 15

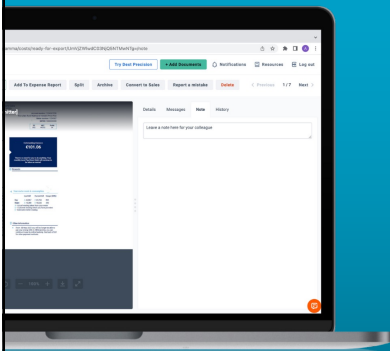**How can you improve how your team work together?**

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Slide 16

A more productive team

User permissions
Specific user roles and use audit logs

Access Practice Insights
Only available on the Dext Optimise plan

Create and publish expense reports
Approve and review expenses

Publish items to accounting software
Be confident that it is correct

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Slide 17

A more productive team

Greater collaboration
- Share client workload
- View messages between client and the team
- Leave notes on a particular item

Speed up processing time

Free up your people to focus on high-value services

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Slide 18

Actionable insights with Dext

> How can understanding your clients better help?

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Slide 19

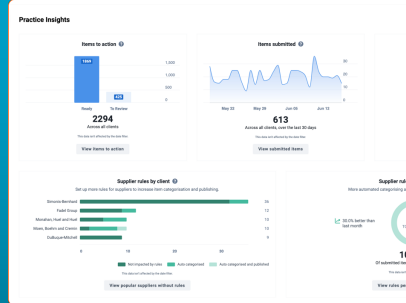### Use Practice Insights

To view key figures

- Items that need to be reviewed
- Items submitted in the last 30 days
- Inactive clients
- Supplier rules performance

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Slide 20

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Use Practice Insights
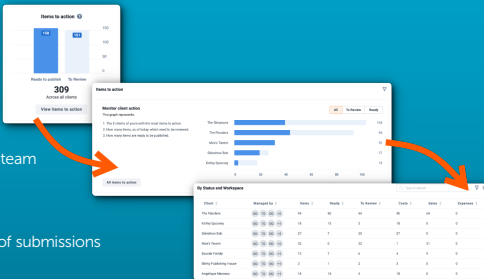
Further analysis
- Gain insights on specific clients
- Who has the most items to action
- Which clients need more support

Who manages the clients
- Gain a better understanding of your team
- Delegate their work better

Submission trends
- Anticipate for times of high volume of submissions
- Plan ahead: resources and workload

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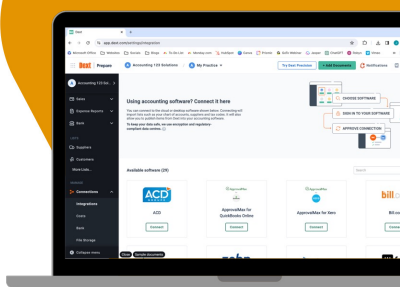## Slide 21

Integration between Dext and BrightBooks

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Integration
Create an end-to-end solution with BrightAccountsProduction

- 34 integrations
- Two platforms work together
- Data can be published directly to BrightAccountsProduction
- Correct format
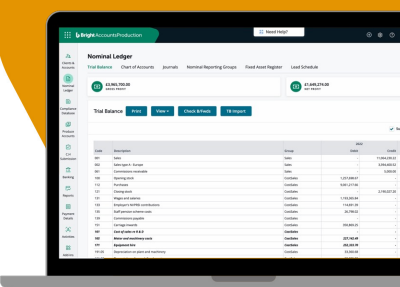- Reducing the risk of incorrect submissions

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Integration
BrightBooks and BrightAccountsProduction

- BrightAccountsProduction is an online accounts production software
- Flexible compliance database
- Multiple format types
- In-built electronic signatures
- Extend to include a bookkeeping platform
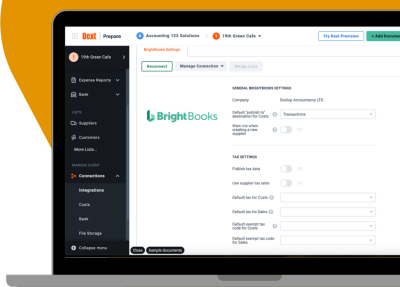- Complete VAT returns
- Bank reconciliation
- And more

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Integration
Reduce errors & save time

- Send expenses in just a few clicks
- Reducing manual entry
- Improves data accuracy
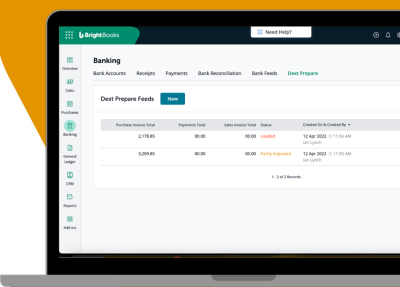- Reduces the time spend locating and fixing mistakes
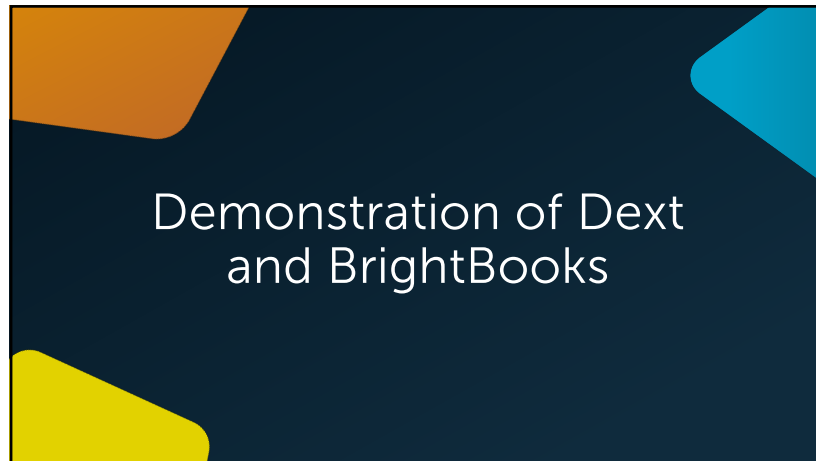
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Integration
Use BrightBooks to modify VAT rates

- Dext does not automate tax calculation if there are multiple VAT rates
- Use BrightBooks to complete this
- Use BrightBooks' Split button to modify VAT rates

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Demonstration of Dext and BrightBooks

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Addressing productivity barriers

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Initial client adoption

> They don't see the benefits
> Poor digital literacy
> No smartphone
> Poor Wi-Fi
> Reluctance for change

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Communication

Put yourself in your clients' shoes
What are they looking for?

Communicate the benefits
> Saves times for both of you
> Receipts are stored in the cloud
> Less chance of losing receipts & money!
> Spread the workload out
> You can offer them insights quicker
> You can identify issues quicker
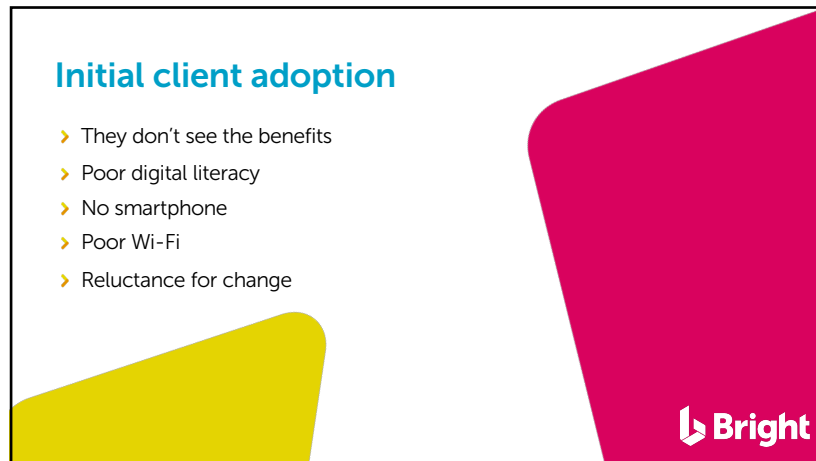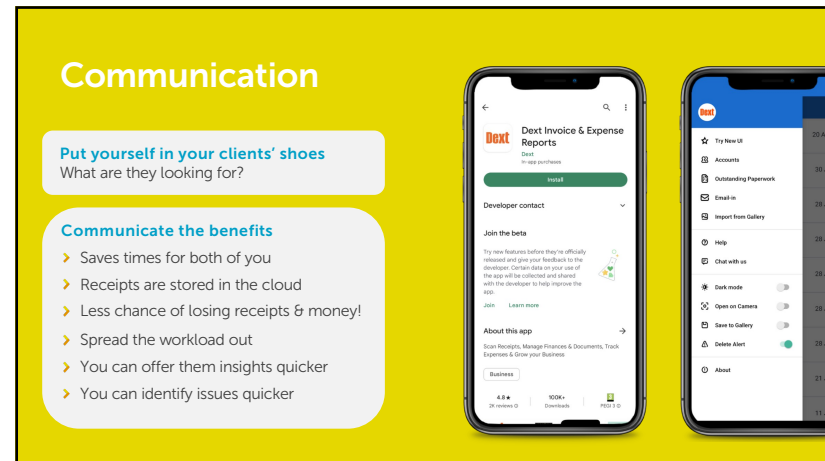

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Technology

Make it as easy as possible
- Training day
- Share the app link
- Alternative: Sending by email
- Take photos and wait to upload later

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Reluctance to change

- Be careful with your communications
- Use the right wording
- Introduce it as a new essential part of your services
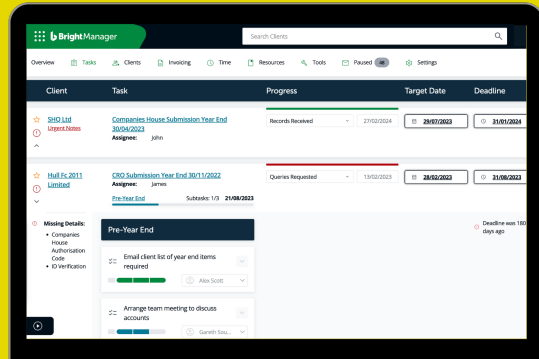- Part & parcel of how you do business

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Continued use of Dext

- Clients need to be using Dext regularly
- Last minute submissions
- Check Dext regularly
- Use Practice Insights
- Use instant messaging to send reminders
- Follow up conversations / training sessions

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Question & Answers

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