MENZIES
BRIGHTER THINKING

I want to better understand my reporting system needs

XERO SYSTEMS PLANNING

▽

WHOLE TEAM
TASK

MENZIES
BRIGHTER THINKING

What is it & why should I do it?

Your roadmap to better business decisions.

This is a stand alone exercise or a follow on from the reporting discussions. Making Tax Digital is an opportunity for business owners to consider how their business operations are undertaken and consider the value of the cloud. If you choose an established platform provider like Xero, it is essential that you map out your current systems to identify integration and process flows.

As a Xero Platinum Partner, Menzies have been supporting clients migrate to the cloud and understand that an effective, well designed system will achieve the following:
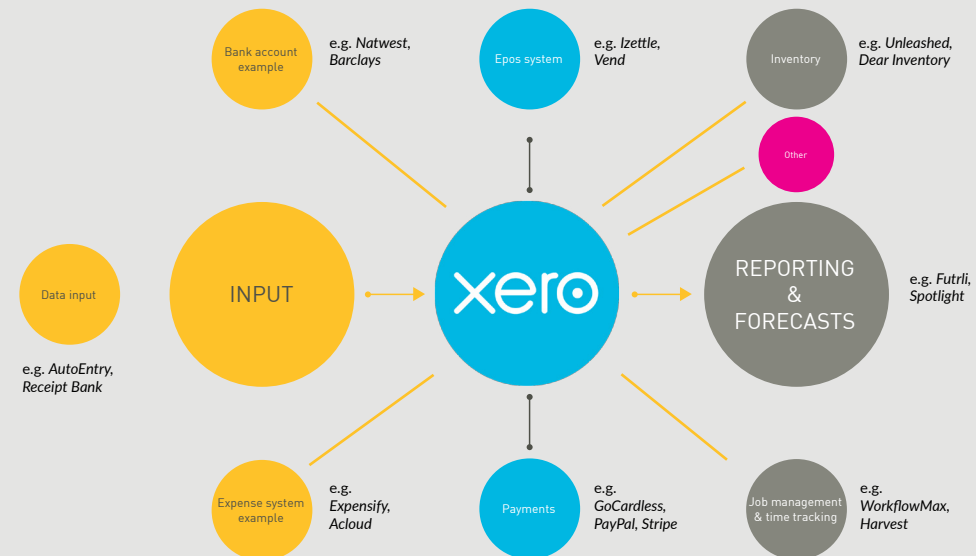
- Reduce hassle and free up your time.
- Access near-real time financial data.
- Plan and scale for the future of the business.
- Reduce processing time allowing more time for reporting and business efficiency analysis.

? HOW TO USE IT

This tool is a systems road mind map used to identify what systems the you currently use or could use to streamline your business and automate with your financial software and reporting.

See www.xero.com/uk/marketplace for details on the full range of apps available in the Xero ecosystem.

Plot and detail current and suggested apps into each area of the Xero project flow diagram to build a map to assist improving information flow and reporting.

Bank account example — e.g. *Natwest, Barclays*
Epos system — e.g. *Izettle, Vend*
Inventory — e.g. *Unleashed, Dear Inventory*
Other
Data input — e.g. *AutoEntry, Receipt Bank*
INPUT
xero
REPORTING & FORECASTS — e.g. *Futrli, Spotlight*
Expense system example — e.g. *Expensify, Acloud*
Payments — e.g. *GoCardless, PayPal, Stripe*
Job management & time tracking — e.g. *WorkflowMax, Harvest*

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