

SYSTEM INTEGRATION CONSULTANCY SERVICE

Once your cloud accountancy software has been setup and configured, and is being successfully used in your business, the main opportunity as the business grows and develops is then to integrate (or link) it to other software being used in the business e.g. CRMs, eBay, PAYPal, Stripe, Point of Sale (POS) systems etc

Examples of these more complex integrations include the following:

- **CRM systems** – Autotask (IT software support), LEAP (Legal)
- **POS software systems** – EPOSNow (Hospitality and entertainment)
- **Online Sales platforms** – Stripe, Ebay, Shopify etc.
- **Merchant Payment Software** - PayPal, Stripe, Sage Pay

Not only can specific data be integrated from other business software into your cloud accountancy software, but there is also the potential to integrate data from your accountancy software back into other business software.

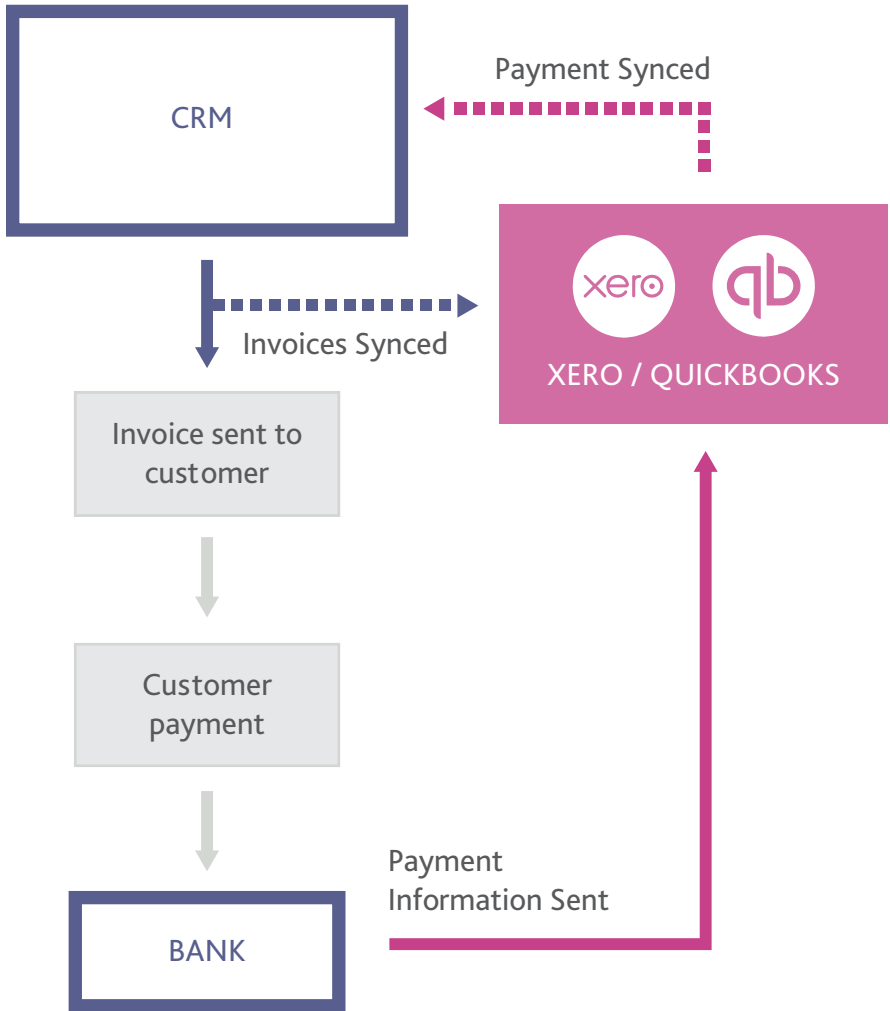
Examples of data that can be integrated includes:

- Sales transactions being sent or 'passed' automatically from your CRM to the accountancy software
- Customer payments being 'passed' into the accountancy software
- Customer payments input into the accountancy software being 'passed back' to the CRM software
- PayPal, Stripe and Sage Pay transactions being automatically 'passed' into the accountancy software

Much of the key integration setup and configuration work involved will generally be focused on:

- Reviewing and planning out how the various day to day processes will work (and/or how current processes may need to be changed)
- Ensuring that the correct information from the transactions is 'passed across' from one software to another e.g. transaction date, customer name, invoice reference, descriptions, currency type, net amount, VAT amount etc.
- Carrying out detailed testing, as well post implementation training or 'troubleshooting'.

SERVICE BUSINESS + CRM SOFTWARE



ONLINE SALES BUSINESS + E-COMMERCE

