

## Smarter Accounts

### Seamlessly syncing your accounting data into Smartsheet

With Smartsheet's excellent project management capabilities, it seems like a no-brainer to integrate data from an accounting package so that the figures are always up to date. But historically, this has been a tricky, convoluted and often entirely manual process. After listening to our clients asking for the ability to automatically upload finance data into Smartsheet, SBP has developed a solution!



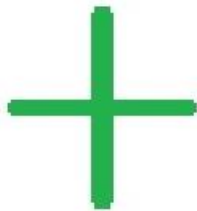
#### Are you still:

- Entering accounting data into Smartsheet manually?
- Exporting a CSV from your accounts then importing it and moving it to its final destination within Smartsheet?
- Waiting for accounts to send you that report you asked for last Wednesday?
- Printing finance reports and sharing them round the room?

#### What can Smarter Accounts do for you?

Manage the automatic synchronisation of the latest finance data from your cloud-based accounting system straight into Smartsheet. With **Smarter Accounts**, you can pull in:

- Profit and Loss reports
- Balance Sheet reports
- Trial Balance reports
- Aged Payables and Receivables reports
- Bank Statements
- Invoices and bills
- Account Transactions



+ All this can be filtered by date, by contact, by bank account or by job tracking code.

+ You choose the number of different reports you want.

+ You choose the frequency of each sync from monthly up to every five minutes.

**+ Even more importantly, you can grant visibility of certain key financial information to different team members according to their focus, without sharing "too much information" or granting direct access to the accounts package itself... all in near real time.**

Once you have your up-to-date finance data in Smartsheet, you can incorporate it into all your Project sheets, your tracking sheets, your reports and your dashboards, keeping your finger on the pulse of your business at all times. You'll never need to hassle the accounts team for a report again!

Smarter Accounts currently integrates Smartsheet with popular accounting software Xero. Integration with other cloud-based accounting software such as Quickbooks Online, Freshbooks or Sage Business Cloud Accounting can be arranged upon request.

This API Integration application can be purchased as an add on to SmarterControl4Smartsheet or as a standalone app. A small fee for setup and training will be followed by a subscription paid for monthly or annually which includes our 7 day support service. Pricing available on request.

**for further information on how to order this excellent add-on or arrange a discussion [click here](#) or email [info@smarterbusinessprocesses.com](mailto:info@smarterbusinessprocesses.com)**

**Smarter Accounts - Seamless, effortless and extremely efficient.**

Smarter Business Processes is a division of RRM Ltd

[www.smarterbusinessprocesses.com](http://www.smarterbusinessprocesses.com)

HQ 26 Clarendon Road, Boston Spa, West Yorks. LS23 6NG +44 1937 541 553  
Level 1, Devonshire House, One Mayfair Place, London. W1 8AJ +44 1937 541 553  
One World Trade Center, Suite 8500, New York NY10007 +1 212 220 7112

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