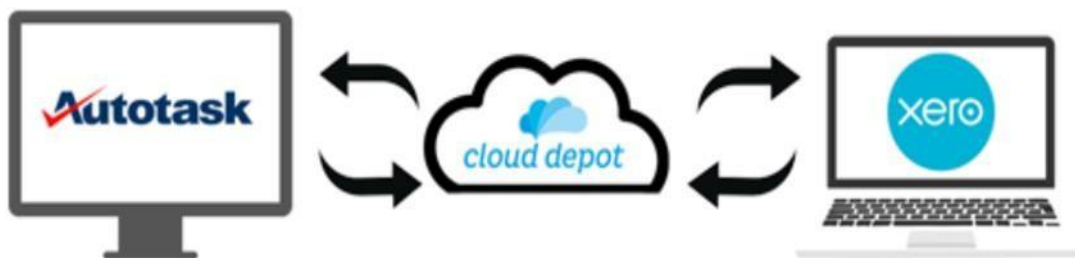### Who Are they ?

'MyAccountingToolbox' is the flagship software product of Cloud Depot, which is an Australian software platform with it's main offices in Australia and New Zealand.

The business operates globally, supporting customers within IT Support/Managed services sector who use Autotask CRM software to manage their client relationships.

What does MyAccountingToolbox software do ?

MyAccountingToolbox software helps businesses in the this sector to automate the accounting of customer transactions generated in Autotask CRM with Xero accountancy software.

The software essentially acts as *'middleware'* that sits (or acts as a *'bridge'*) between the Autotask CRM software, which when connected (or linked) to Xero, will automatically send invoices (recurring and non recurring), credit notes, purchase orders etc., directly into Xero on an instant, hourly or daily basis, as necessary.

How does it help my business then ?

For businesses that operate in the IT Support/Managed services sector, **Autotask CRM,** is in many ways **key** to managing their business.

It holds not only all customer relationship information and service tasks, but also acts as the software that generates all recurring, non recurring and project/'one off' invoices to it's customers !

MyAccountingToolbox will automatically:

1. Import all new customers created in Autotask CRM **into Xero**

2. Import all customer (sales) invoices and cancellations/refunds **into Xero**
3. Allow the use of Autotask or Xero reference numbers on invoices as necessary
4. Enable the *'passing back'* of customer payments **from Xero** into Autotask - allowing allocation against the original invoices in Autotask (with **'real time' update of Customer accounts** !)

What are the Key benefits by using MyAccountingToolbox ?

- **Save (lots of) time** – remove the frustrations and time involved in downloading **sales information** from Autotask CRM and manually adding this information into Xero.

- Import **'real time' customer payments** back into Autotask CRM without duplicating manual input time !

- Autotask to Xero integration can save **'hundreds of hours'** each month in manual double entry.

- **Accurate data** – data is **much more** accurate as the creation of an invoice in Autotask will send it automatically to Xero

- **Up to Date 'real time' financials** – depending on your subscription level, you can have access to detailed and up to date sales activity in Xero within minutes or hours !

What are the costs of the MyAccountingToolbox software ?

Each subscription level is based on a combination of -

1. the speed of the data 'syncing' between **Autotask CRM** and **Xero (**Instant, Hourly and Daily)
2. as well as the volume of transactions e.g. from 50 transactions per hour to

unlimited Standard monthly fees vary from $45 to $65 per month depending upon

subscription level.

Is there additional 'scoping' (or setup) required ahead of being able to use the MyAccountingToolbox for my business ?

Yes.

Given the size of the benefits that can be obtained, there is a need to carry out some '**scoping**' and ensure that the software is setup accurately to enable a successful implementation into your business
i.e. clarify precisely your business needs, reviewing Xero and auditing the quality of data held within **Autotask CRM etc**

Additionally the setup is required to ensure that the **'links'** to connect the **Autotask CRM**, **MyAccountingToolbox** and **Xero** are in order, BEFORE attempting to automatically import any transactions.

Integration Opportunities

MyAccountingToolbox software is designed specifically for **Autotask CRM** and **Xero** only !

Talk to the team at Sakura about how we can simplify your accounting through the use of digital and cloud solutions, whether by using MyAccountingToolbox or other software options !!