Smarter Accounts

Seamlessly sync your accounting data to and from Smartsheet

· **Integrate** financial reports and transaction records into Smartsheet

· **Create** bills, invoices, purchase orders and more within your accounts, direct from Smartsheet

· **Filter** by date, contact, account or tracking code

· **Choose** when and how frequently you **sync** the information with Smartsheet

What Smarter Accounts can do for you

· **Control access** to your financial information
· **Grant visibility** to team members, based on predefined permissions
· **Incorporate financial data** automatically into your project sheets, tracking sheets, reports, and dashboards, keeping your finger on the pulse of your business at all times

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What Smarter Accounts can do for you

· **Integrate** Smartsheet with popular accounting software Xero

· Integration with **other cloud-based accounting software** such as Quickbooks Online can be arranged upon request

USE CASE

· **Create management account dashboards** within Smartsheet using regularly-updating data from your accounts

· Cuts out the need for the accounts department to create separate sets of management accounts each month or quarter

USE CASE

· **Create accounting PDFs** (quotes, invoices, etc) outside of your accounting package
· Use Smarter PDF Creator to **create bespoke documents** that **sync** with Smarter Accounts

USE CASE

· Add quote, PO, invoice, bill, and credit note information within Smartsheet and Smarter Accounts to **automatically create** the relevant draft records within your accounting package

· **Create an approval process** within Smartsheet to post the records when they've been checked

smarter
BUSINESS PROCESSES

Click here to register your interest