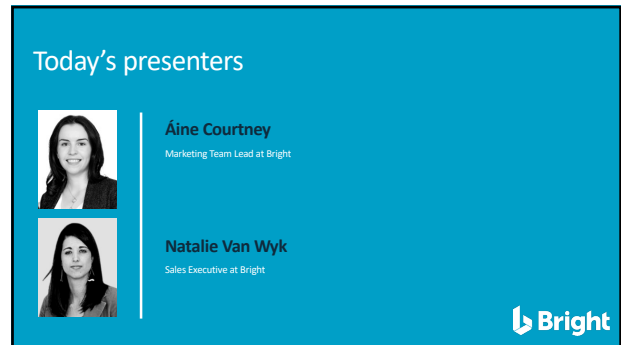
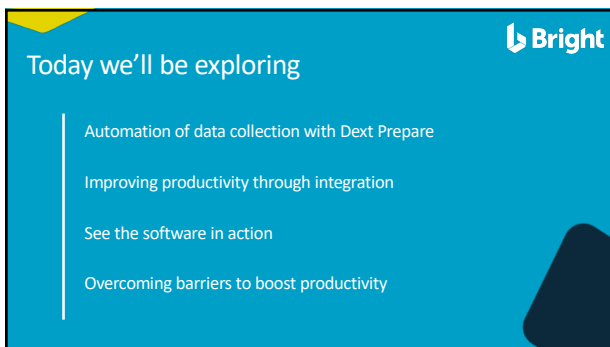


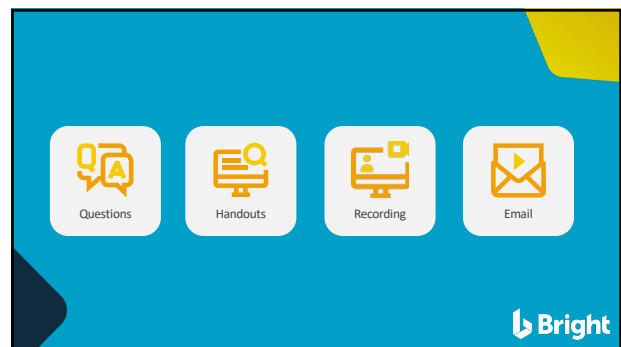
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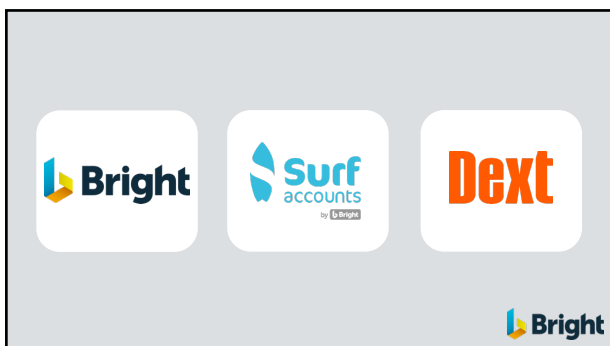
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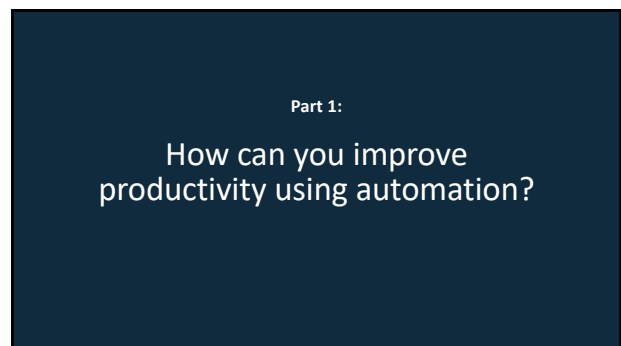
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6

Part 1

How can you improve productivity through automation?



- Automation
- Communicating effectively
- Team work
- Actionable insights



7

Automation

- Collection and input of client data**
Time-consuming and tedious
- Unmanageable paperwork and receipts**
Unorganised paperwork
- VAT-return services**
Improving the pre-accounting processes
- Dext Prepare**
Use software to automate paperwork

8

Automation

Use Dext Prepare to submit:

- Supplier invoices
- Expenses
- Sales invoices
- Digital sales

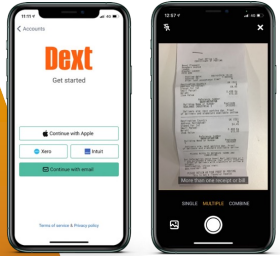




9

Automation

Your clients can submit documents in a number of ways:

- Dext mobile app
- Email
- Drag and drop multiple pdfs

10

Dext

- 99% accuracy
- 20 million documents
- 30 seconds
- 65% take 8 seconds

11


Automation

More automation with supplier & customer rules

- Category
- Invoice due date
- Tax rate
- Payment method
- Paid/Unpaid status
- Description
- Currency

Dext offers **Smart Split**

- Split a receipt into line items
- Percentage split
- Fixed amounts



12

Communicate effectively with clients

How else can Dext improve productivity?



13

Communication

Instant item messaging

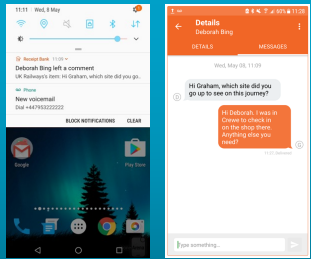
- Direct message
- Get further clarification

Tracking information

- Time stamps
- Keep track

Push notifications

- Alerts received on their phone
- 7 times more likely to be opened



Bright

14

A more productive team

How can your software help your team work together?




Bright

15

A more productive team

- User permissions**
Specific user roles and use audit logs
- Access Practice Insights**
Only available on the Dext Optimise plan
- Create and publish expense reports**
Approve and review expenses
- Publish items to accounting software**
Be confident that it is correct



16

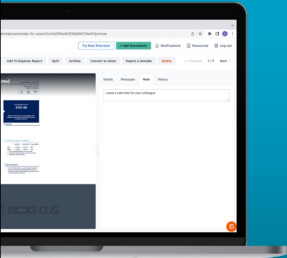
A more productive team

Greater collaboration

- Share client workload
- View messages between client and the team
- Leave notes on a particular item

Speed up processing time

Free up your people to focus on high-value services




Bright

17

Actionable insights with Dext

How can understanding your clients better help?



Bright

18

Use Practice Insights

To view key figures

- Items that need to be reviewed
- Items submitted in the last 30 days
- Inactive clients
- Supplier rules performance



19

Use Practice Insights



Further analysis

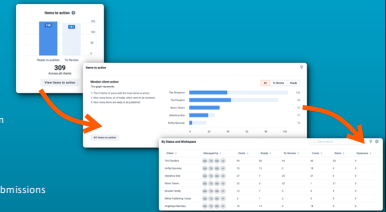
- Gain insights on specific clients
- Who has the most items to action
- Which clients need more support

Who manages the clients

- Gain a better understanding of your team
- Delegate their work better

Submission trends

- Anticipate for times of high volume of submissions
- Plan ahead: resources and workload



20

Part 2: Integration between Dext and Surf Accounts

How else can Dext improve productivity?

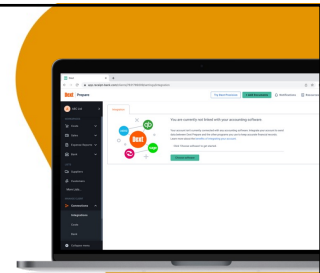


21

Integration

Create an end-to-end solution with Surf Accounts Production

- 34 integrations
- Two platforms work together
- Data can be published directly to Surf
- Correct format
- Reducing the risk of incorrect submissions

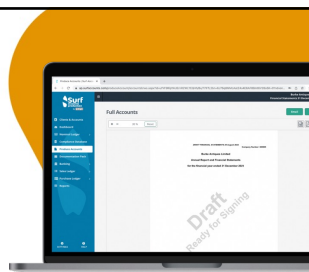


22

Integration

Surf Accounts and Surf Accounts Production

- Surf Accounts Production is an online accounts production software
- Flexible compliance database
- Multiple format types
- In-built electronic signatures
- Extend to include a bookkeeping platform
- Complete VAT returns
- Bank reconciliation
- And more

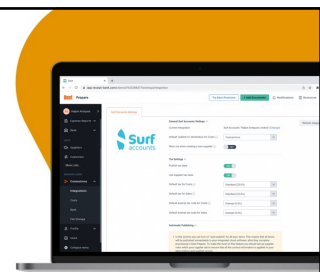


23

Integration

Reduce errors & save time

- Send expenses in just a few clicks
- Reducing manual entry
- Improves data accuracy
- Reduces the time spend locating and fixing mistakes



24

Integration

Use Surf to modify VAT rates

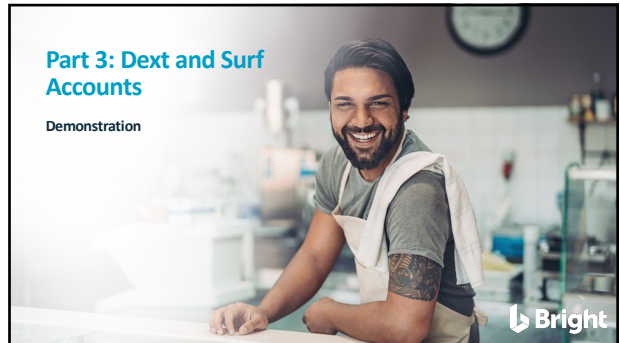
- Dext does not automate tax calculation if there are multiple VAT rates
- Use Surf to complete this
- Use Surf's Split button to modify VAT rates



25

Part 3: Dext and Surf Accounts

Demonstration



26

Part 4: Addressing productivity barriers



27

Part 4: Addressing productivity barriers

1. Initial Client Adoption

- They don't see the benefits
- Poor digital literacy
- No smartphone
- Poor Wifi
- Reluctance for change



28

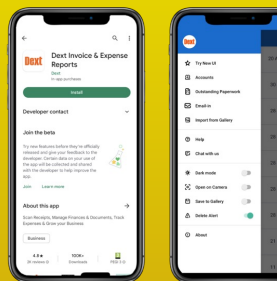
Productivity barriers: Communication

Put yourself in your clients' shoes

What are they looking for?

Communicate the benefits

- Saves times for both of you
- Receipts are stored in the cloud
- Less chance of losing receipts & money!
- Spread the workload out
- You can offer them insights quicker
- You can identify issues quicker



29

Productivity barriers: Technology

Make it as easy as possible


- Training day
- Share the app link
- Alternative: Sending by email
- Take photos and wait to upload later



30

Productivity barriers: Change

- Be careful with your communications
- Use the right wording
- Introduce it as a new and essential part of your services
- Part & parcel of how you do business



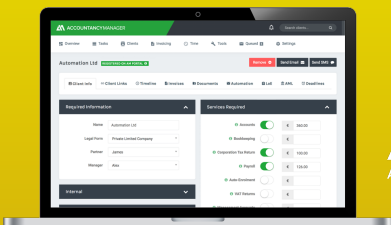

31

Productivity barriers: Continued use of Dext

- Aim to have your clients using Dext regularly
- Bad habits: waiting until the last minute to submit the information
- Check Dext regularly
- Use Practice Insights
- Use instant messaging to send reminders
- Have a follow up conversation or a follow up training session




32




33

Part 5: Questions & Answers

34



Home to award-winning payroll, accounting, practice management and HR software

35