

# Digital Discovery Options Report for XYZ Client

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## Introduction

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This report provides our recommended options for your business based on the research that we conducted for you.

To come to our recommendations we considered both the outcome of our discussions and processes mapping, which in combination provided us with the essential requirements for an integrated business system.

# Accounting Platform

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## Xero

<https://www.xero.com/>

Xero is a beautiful, intelligent software platform designed to make life better for your small businesses, to help you grow and thrive.

Xero's online accounting platform provides the foundation on which businesses can build a complete business solution by connecting third party apps. It connects to your bank, accounting tools, payment services and third-party apps, so everything is securely available at any time, on any device.

Xero helps us to collaborate with you in real-time to provide up to date and relevant advice so you can make better decisions.

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## Inventory Management Apps



### UNLEASHED

#### Unleashed

<https://www.unleashedsoftware.com>

##### Description

Unleashed is a cloud app that gives businesses full visibility and control over their inventory. It solves the problems caused by poorly managed stock — including stockouts, stagnating margins and lost goods — by enabling users to track their goods across suppliers, warehouses, production, customers and sales.

Unleashed comes with managed integrations with apps for accounting, commerce, CRM and more — meaning it can operate at the heart of any product-based business's cloud ecosystem.

##### Non-Accounting Integrations

Amazon Seller Central, Crossfire, Inventory Planner, Magento, NetEDI, OneSaas, Prospect CRM, Salesforce, Shiptheory, Shopify, StockSync, StockTrim, Streamline, Unleashed, Vend, Wink Reports, Zapier



#### Cin7

<https://www.cin7.com/>

##### Description

Cin7 is an automated inventory management platform for brands growing revenues over \$1 million. Cin7 synchronises stock with sales and orders across every physical and online sales channel, and automates order processes for greater efficiency. Brands that sell or distribute products use Cin7 to keep costs down, margins and cash flow high and stock at the right level.

##### Non-Accounting Integrations

Amazon Seller Central, Amazon Vendor Central, BigCommerce, Capsule, eBay, Etsy, Inventory Planner, Magento, MailChimp, PayPal, Prospect CRM, Salesforce, Shipstation, Shiptheory, Shopify, StockTrim, Streamline, SyncHub, Wayfair, WooCommerce, Wufoo Forms

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## CRM Apps



#### Prospect CRM

<https://www.prospectsoft.com/>

##### Description

Prospect is a Stock-Aware CRM that's specifically designed for growing Wholesale, Distributor and Manufacturing businesses that sell physical products, B2B. Prospect CRM integrates product, inventory and customer sales data, to streamline your B2B sales processes.

##### Non-Accounting Integrations

3CX, Cin7, Dear Systems, Intercom, Office 365, Power BI, SAP, Spotler, Stripe, Tradegecko, Unleashed, Zapier, Zing Respond

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## Receipt & Invoice Processing Apps



### AutoEntry

#### AutoEntry

<https://www.autoentry.com/>

##### Description

AutoEntry allows you to capture, process, record, and store your business receipts, bills, invoices, and bank statements, all in one place that integrates directly to your accounting software.

Capture receipts and bills through the AutoEntry mobile app, by sending emailed documents to a unique email address, or pull them directly from your supplier accounts.

Automate data extraction and reduce time on data entry tasks.

##### Non-Accounting Integrations

Farmplan

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## Purchase Management Apps



### ApprovalMax

<https://www.approvalmax.com/>

##### Description

The ApprovalMax system replaces paper and email-based approvals with fully automated multi-role and multi-tiered approval workflows, and safeguards the enforcement of financial controls in your business.

ApprovalMax extends world-leading online accounting platforms such as Xero and QuickBooks Online with flexible automation of approval processes for small and medium-sized businesses.

##### Non-Accounting Integrations

Receipt Bank

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## Expense Management Apps



### Soldo

<https://www.soldo.com/gb/>

#### Description

From petty cash to online procurement, digital advertising to employee travel and entertainment – manage all business spending with Soldo.

Simplify payments with Mastercard® prepaid cards. Manage budgets, set rules, and track spending in real time. Capture receipts, VAT, and categories with the mobile app.

#### Non-Accounting Integrations