



Top 10 Tech To Include in Your Accounting Toolkit

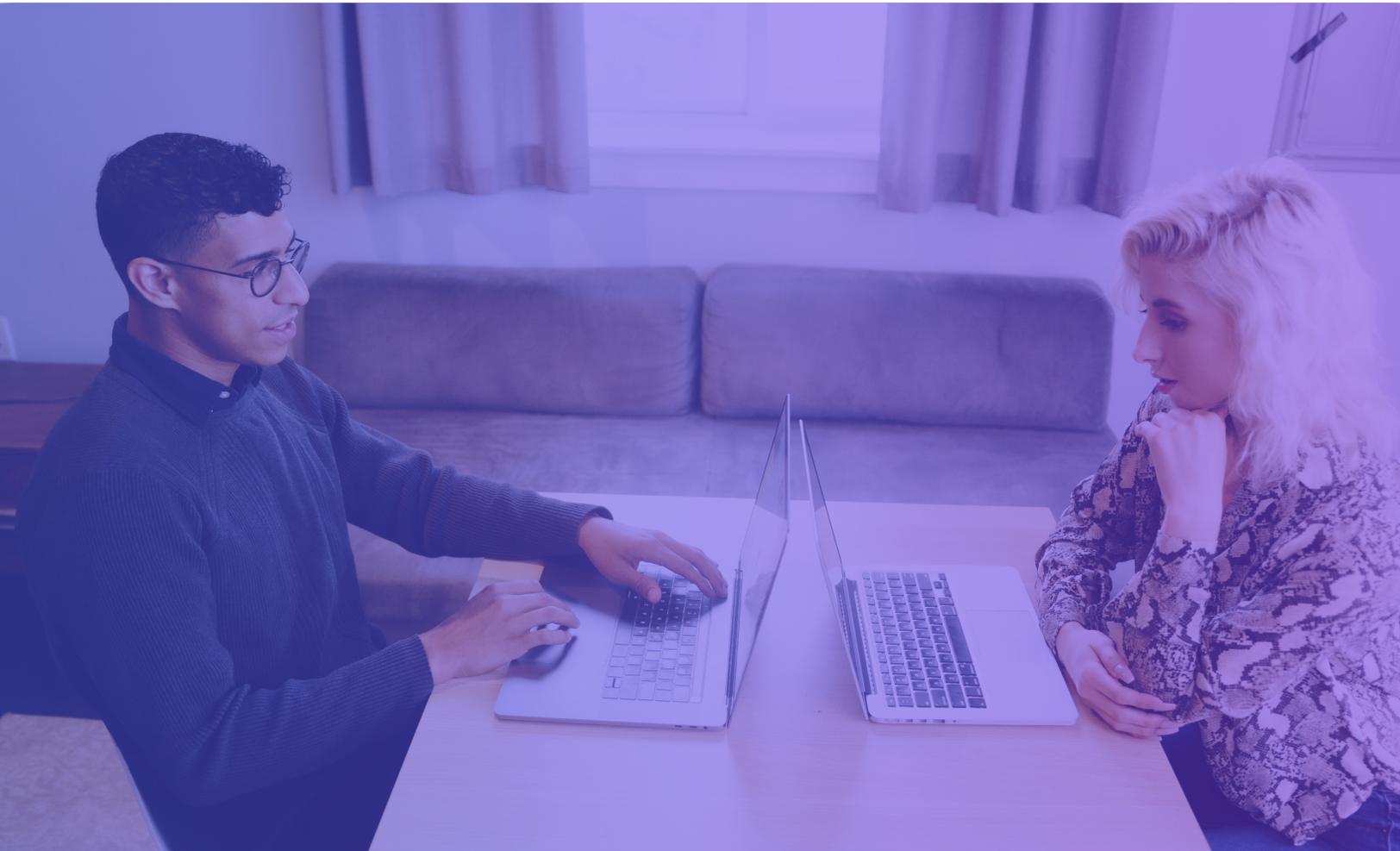
Introduction

How would you rate your accounting toolkit?

In the past, accounting professionals were encouraged to have fairly static tech stacks: a lineup of tried-and-true apps that they knew worked well for their business.

Now, accountants overlap with technologists--part of their role is researching and seeking out the newest and most effective tools to help their clients. Diversifying and continuously updating the tools you use is key in order to meet all the needs of your clients.

We reached out to some leaders in the industry to assemble the must-have list of the top 10 apps, tools, and tech that are helping accounting professionals stay efficient, organized, and client-focused.



1. MoneyThumb

Anything that can relieve stress during tax season, and reduce manual entry, is a win. Mariette Martinez, Small Business Educator and Advisor at [MasterYourBooks](#) calls MoneyThumb--a program that converts PDF bank statements into QuickBooks Online (QBO)-formatted bank uploads--her secret weapon.

"I use this year-round," says Mariette. "Especially during tax season, when clients come in with previous years' of accounting and I need to recreate their books. Before MoneyThumb, I would dread the days of manual entry required to complete the engagement. Now, in a matter of minutes, I can have several years of PDF bank statements converted into QBO bank upload formatted files. All I have to do is categorize and create financial statements. Seriously, it's really that easy! My billing efficiency increased 10 times over."



Mariette Martinez

2. Melio



Nayo Carter-Gray

You know we love an app that integrates seamlessly with QBO. Nayo Carter-Gray, EA Accountant at [1st Step Accounting](#), recommends Melio: A bill-paying app. Easily upload and enter a bill on QBO and pay it directly through the built-in integration with Melio.

"There's also a Melio dashboard I can log into to not only see and manage my company data, but also the data for my clients," continues Nayo. "Melio is so powerful because it lets you choose how you want to pay a bill regardless of the vendor's payment methods. So, you can max out those credit card points while your vendor gets their ACH payment as requested. From one-off or recurring bills, Melio can handle them all."

3. Divvy

"Divvy is an essential tool in my firm," says Heather Satterley, Founder of [Satterley Training and Consulting](#). This corporate card and expense management platform "streamlines our expense management workflows and allows us to track our spending against predefined budgets."

Heather is also able to delegate funding to team members who need to make a purchase. "It is, by far, the best expense management tool I've seen with superior internal control capabilities and exceptional customer support."



Heather Satterley

She also recommends Divvy to clients who have employee expense reimbursement workflows.



“First and foremost we love the internal control of setting expense limits for dollar amounts, time period (a burner card only allows purchases up to a certain amount and for a limited period of time), and expense category (such as fuel or office supplies). It also takes the cash flow burden away from employees who no longer need to use their own credit cards or cash to make work-related purchases.”

Does it integrate with common accounting software? You know it.

4. Plooto

“When I started using QBO and all the third-party apps, I was like a kid in a candy store,” says Melanie Schroeder, Founder and CEO at [Out of The Box Chartered Professional Accountant Inc.](#) One app, Plooto, stood out to her as extra reliable when it came to working with the majority of her clients.



Melanie Schroeder

“Sending and receiving money is a critical factor in the success of any business,” says Melanie. “So is the ability to delegate without worrying about the security of your bank accounts. Plooto has come through for my not-for-profit clients in this regard.”

Clients in the non-profit sector may have board members in separate geographical locations, need multiple signatures and have several people managing the bill approval process. “With Plooto, the signatories can easily see what payments need to be approved along with the source documents and approve or reject individual payments as needed without worrying about giving any one individual access to the bank account.”

5. SaasAnt

“Dan Luthi, COO of [IgniteSpot Accounting](#) says one of his recent favorite apps, SaasAnt, isn’t one making a lot of headlines in the accounting community. However, he describes it as “the swiss army knife for an accountant that needs to pull information in and out of QBO while keeping the rest of your data intact.” Now that’s a review.



Dan Luthi

“This tool has been a fantastic resource for our firm,” says Dan. “Work that used to take days to perform--by pulling transactions in and out of QuickBooks one at a time and modifying them--can now be done in a single pull to a CSV file.”

“If you need to update a hundred memo lines on a month’s worth of transactions or export a year’s worth of invoices and reimport them to map to new items, this tool will save you time. SaasAnt has changed the way that we worked over the past several years.”



6. LivePlan

As someone who's always searching for technologies that best serve his clients, Cassidy Jakovickas of [MBS Accountancy](#), was thrilled to discover LivePlan: A program for writing business plans, securing funding, and helping businesses at any stage of development.

"LivePlan is a pretty awesome tool," says Cassidy. "It connects business planning with financial performance over time. Our clients use LivePlan's integration with QBO to view breakdowns of their revenue and expenses by class and type, examine revenue streams, and easily view operating income and net profit."



Cassidy Jakovickas

Both the QBO integration and the powerful dashboard provide business owners with the information they need to make profitable decisions, both now and for the future.

7. A2X Accounting

Calling all accountants with e-commerce clients!

Veronica Wasek, Founder and CEO [VM Wasek](#), recommends A2X Accounting as her go-to app for all her Shopify bookkeeping clients. "It been a game-changer for me and my team," she says. "We save so much time recording our client's e-commerce income transactions and we've also built a fantastic niche."



Veronica Wasek

Not only does the program work for Shopify, but it's also a great choice for Amazon, Walmart, eBay, and Etsy sellers. An all-around win for e-commerce clients.

8. Uncat

Who can relate to getting lost in a seemingly endless spiral of follow-up emails with clients? Jason Staats, Partner CPA at [Brenner](#), found that Uncat greatly reduced the time wasted in ad-hoc emailing to answer various questions.

"When you point Uncat to a designated 'uncategorized' account in your QBO file, the platform will automatically follow up with the client until they resolve outstanding questions on an ongoing basis," says Jason. "It's super quick, easy, and takes the interpersonal friction out of making these requests."

Our only question is, what will you do with all the extra time?



Jason Staats



9. Fathom

Eric Pierre, Owner and Principal of [Pierre Accounting](#) recommends Fathom as “a great add-on for measuring KPIs and analysis of a client’s financial health compared to other companies in the same industry.”

He notes Fathom’s interactive dashboards as a powerful tool for budgeting and forecasting. “It’s fully customizable,” continues Eric. “You can build monthly, quarterly, or annual reports for lenders, investors, and management teams.”



Eric Pierre

As with any truly essential program, Fathom also seamlessly integrates with QBO. “It has an attractive UI, making it easier to keep clients engaged,” says Eric. “Fathom helps accounting firms turn financial data into visually appealing graphs and performance reports.”

10. Rewind



Matt Hayon

Now that you’ve got an idea about which apps are top of mind in the industry, we should mention...

All of these accounting professionals also recommend Rewind as a must-have in their professional toolkits. Streamlining bill pay, bulk editing, user-friendly dashboards full of key data points—all fantastic. Rewind is the tool that ensures none of that data that you’ve so diligently helped your clients compile in the most attractive, accessible way possible is lost forever.

Rewind has been an important tool to complement the services that I provide,” says Matt Hayon, COO of [Compass CFO Solutions](#). “Their Quickbooks backup service has been an invaluable resource in giving me, and our clients, peace of mind. Having the knowledge and confidence that any sensitive, crucial data is backed up eases my fears that if the worst should happen—I have Rewind to lean on.”

Everyone needs a backup strategy—make sure your tech stack has a plan for the unexpected.



The Rising Value Of Today's Accounting Professionals

When clients hire accountants, they are looking for more than just help with their taxes-- they want real guidance on how to manage their finances and grow their business.

The value of today's accounting professional is to be a trusted advisor, and that includes maintaining a high level of knowledge and expertise on which tech--among an ocean of options--is worth the investment and makes a difference.

The above is a list of tools that leaders in the industry are using and loving right now. We've done the work of compiling the best of the best for you, make sure to take advantage so you're up to speed on the latest and greatest in technology that will help your practice.

Curious to learn more about adding Rewind to your Accounting Toolkit?

[Learn more](#) about implementing Rewind for your QuickBooks Online clients.



About Rewind

Since 2015, Rewind has been on a mission to help businesses protect their SaaS and cloud data. Today, over 80,000 customers in more than 100 countries use Rewind's top-reviewed apps and support to ensure their software-as-a-service applications run uninterrupted. The Rewind platform enables companies to back up, restore and copy the critical data that drives their business.

