

Dext

FinancialCents

July 27, 2:00pm - 3:00PM Eastern

All the Apps You Need to Run a Successful Virtual Firm

With Kellie Parks, CPB | Founder,
Calmwaters Cloud Accounting



“

**Today you are
going to gig out on
cloud technology!**

”



Does your Tech Stack Look Like My Landscaping Equipment?



Oh Dear!





Kellie Parks, CPB

Founder,

Calmwaters Cloud Accounting
&
Cloud Accounting Resources

Today's agenda



The Benefits of Cloud Apps



The App Verticals You Need For Your Firm



How To Choose The Apps You Need



How To Choose Apps You Will Use

What is Dext?

What is Financial Cents?

Document management

When to use Dext

Ongoing bank statements

Source docs

When to use Financial Cents

Onboarding

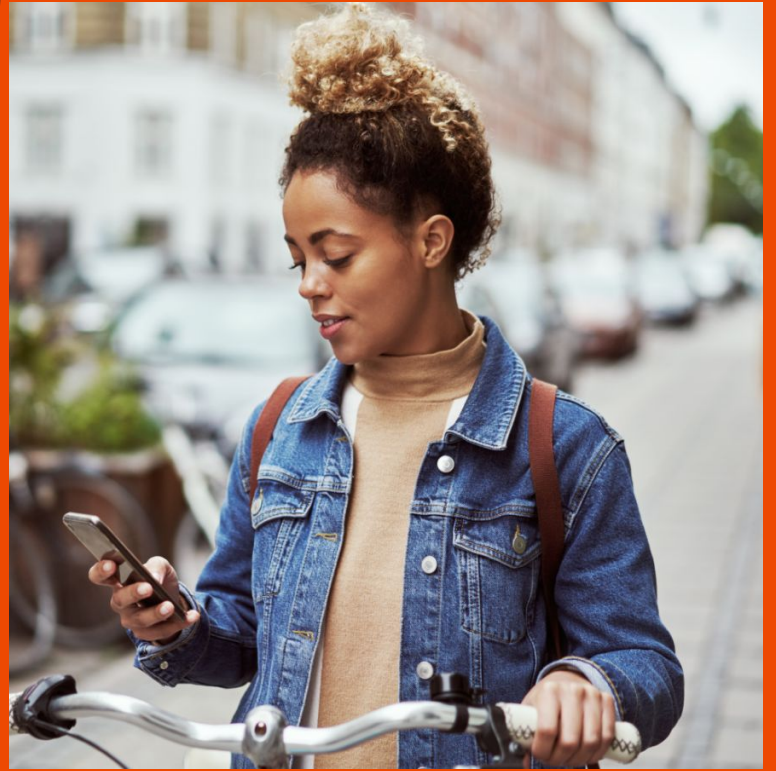
Audit/tax work

Ad hoc bookkeeping requests





The Benefits of Cloud Apps



Cloud technology is fabulous!

- ✓ Accessibility
- ✓ Collaboration & sharing
- ✓ Data security & backups

Cloud technology is fabulous!

- ✓ Efficiency
- ✓ IT Savings
- ✓ Scalability





The App Verticals You Need For Your Firm



Accounting

- ✓ Document management
- ✓ General ledger
- ✓ Payment processing

Accounting

- ✓ Payroll
- ✓ Specialty apps



Back office

- ✓ Communication
- ✓ Marketing
- ✓ Practice management

Fun & efficient

- ✓ AI
- ✓ Streamdeck
- ✓ Text expanders





How To The Choose Apps You Need



Yes

It solves a
problem you
have.



Yes

API &
integrations



Creates
efficiency
and/or
automation



Corporate
culture



Evolving &
innovating

Yes

Feature fit



Price



Security



Support

No

Because all
your friends
are trying it!





How To Choose Apps You Will Use



**Features alone are
not enough**

**UX/UI is one
of the biggest
factors.**



Yes

Animations,
emojis &
interactions



Consistent
branding



Simplicity



Speed &
performance

My core apps

Accounting

- Dext - QBO- Plooto - RightTool (Code: CALMWATERS20X12) - Wagepoint

Client management

- 17Hats - Acuity - Financial Cents - Google Workspace - Typeform - Zoom

My core apps

Marketing & sales

- Canva - Grammarly - Squarespace

Security & backups

- 1Password - Bitdefender - CloudHQ - Authenticator - Rewind

What challenges are you facing in choosing your apps?





I sell workflow templates
specific to
Financial Cents.

Code: DEXTFC for 25% discount





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www.financial-cents.com



Dext



Book a Demo Today
Link in chat





THANK YOU

QUESTIONS?

