

TECH

Stack



FOR PRACTICE SUCCESS,
CLIENT MANAGEMENT & BIZ LIFE BALANCE



PRACTICE MANAGEMENT

MYOB AO/AE, Sage HandiSoft, Senta, Xero XPM



DOCUMENT MANAGEMENT

Box, CCH iFirm, Dropbox, FYI Docs, Google Drive, How Now, iCloud, MYOB Document Manager, MS Planner, Nimbus, Sage HandiSoft, Sharepoint, Suite Files, Virtual Cabinet



WORKFLOW MANAGEMENT

Asana, Clickup, Karbon, Monday, MYOB AO/AE, Senta, Trello, Xero XPM



SECURITY, ANTI-VIRUS, PASSWORD MANAGER

Security | Practice Protect
Password Manager | Last Pass

Anti-Virus | Kaspersky, McAfee, Norton



WORKPAPER TEMPLATES

Change GPS, Knowledge Shop, How Now, Xero

Your *Pathway* TO A **BETTER** *Practice*
 AND A **BETTER** *Life*
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TIMESHEET

Clickup, Clockafy, Harvest, Minute Dock, Monday, MYOB AO/AE, Timely, T-Sheet, Sage HandiSoft, Xero XPM



CLIENT ONBOARDING, QUOTING & ENGAGING

Change GPS Engage, Dubsado, Go Proposal, Quotient, PandaDoc, Practice Ignition



CLIENT ACCOUNTING SOFTWARE

MYOB, QBO, Xero



E-SIGNING

Annature, Adobe Sign, Docusign, Docsketch, E-Sign, Eversign, Fusesign, Handisoft, Hello Sign, MYOB, Nimbus, Nitro PDF, Panda Docs, Please Sign, Secured Signing, Sign Easy, Sign Now, Small PDF, Soda PDF, Suite Files, Xero



RECORD KEEPING

AutoEntry, Dext, Hubdoc, MYOB Capture, XBert, Xero

Any more?

Do you have a secret weapon in your tech stack that I have missed?
Email admin@amandagascoigne.com to make the next version of the list.

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