



Business Efficiency Audit

COULD YOU BENEFIT FROM A MOVE TO THE CLOUD?



Getting Started

TAKE 5 MINUTES TO THINK ABOUT HOW EASY IT IS TO COMPLETE CRITICAL BUSINESS TASKS

As a business owner, your time is valuable. Every minute you spend on administrative tasks, double data-entry or “getting back” to people while you double check your data; impacts on your ability to grow your business.

This Audit offers a straight-forward list of functions and an opportunity for you to assess how satisfied you are with the process of completing them.

If you score “1” or “2” on a particular item, you may benefit from making some improvements to your IT solutions.

Contact Logisoft for a complimentary 30-minute phone consultation to understand how we can help you. Phone 1300 360 746.

How does it work?



To complete this review, please rate your current level of satisfaction using the following scale:

- NA = Not Applicable
- 1 = Poor (Completely Unsatisfactory)
- 2 = Marginal (Needs Improvement)
- 3 = Satisfactory (Meets Requirements)
- 4 = Excellent (Exceeds Expectations)

Finances & Reporting

All business types to complete.



	(4) = Excellent	(3) = Satisfactory	(2) = Marginal	(1) = Poor
Ability to manage & pay bills quickly & easily.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to stay on top of all the bit of paper and receipts around the office (document management).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Get paid on time. Stay on top of debtors.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accurately schedule and track employee time and integration to payroll solution.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Track jobs from quote to invoice in the one system.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
all your notes, quotes, emails, documents all in one place.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accept credit card payments.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create professional recurring invoices.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Calculate the payroll, pay employees and manage payroll taxes quickly and easily.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create and email custom purchase orders and copy to bills for payment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage your cash flow by payments and batch paying suppliers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enter information once and have it flow across all your business systems.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Retail & Hospitality

Optional Industry-Specific Functionality Assessment



	(4) = Excellent	(3) = Satisfactory	(2) = Marginal	(1) = Poor
Manage Rosters & Timesheets.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Time clock and accountability tools to document employee shifts and performance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accept Credit Cards.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to easily integrate your marketing and loyalty apps.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Automatically export daily sales into your accounting system .	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage inventory & orders in real-time.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Easily manage and accept payments via your online store.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accurately track costs, margins and stock control.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Building, Trades & Construction

Optional Industry-Specific Functionality Assessment



	(4) = Excellent	(3) = Satisfactory	(2) = Marginal	(1) = Poor
Process payments on a mobile device.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Track time on site for all team members with real-time status tracking.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Invoice immediately onsite or after the job.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Easily track all paperwork associated with a job electronically. Process and track signatures for quotes and job sheets.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Easily make changes and communicate them between the people in the field and the office.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Track every job from quote to invoice.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Get real-time visibility in the availability of every team member to book jobs as they come in.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understand the profit margin on each job.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Track your leads, sales pipeline and proposals in one place.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Issue and track progress payments.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Wholesale & Distribution

Optional Industry-Specific Functionality Assessment



	(4) = Excellent	(3) = Satisfactory	(2) = Marginal	(1) = Poor
Track and manage all products, customers, suppliers, contacts, purchases and sales easily and efficiently.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monitor your business metrics such as cash position, revenue vs. expenses, profit loss trend, debtor days etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Complete visibility and integration across your Inventory, POS, EDI and 3PL solutions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Easily and accurately track stock across multiple warehouses and locations with serial number and batch tracking.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Complete stock take quickly and easily using barcodes and handheld devices.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability for sales representatives to access customer and stock information on the road.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seamless integration with your eCommerce solution.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Track and manage stock across multiple locations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access real-time accurate inventory information on the road.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accurate batch tracking.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Next Steps

IMPROVE EFFICIENCY & SAVE MONEY WITH CLOUD-BASED ACCOUNTING & APPLICATIONS.

Cloud accounting, is also known as online accounting. It's similar to traditional accounts software, however the accounting software is hosted on remote servers rather than being saved and accessed on desktop computers. Your accounting data and information is accessible via your web browser or mobile device and the financial data is securely stored on servers.

Cloud adoption rates continue to rise. Whether you're a small, medium or large business, a carefully managed switch to a cloud accounting platform could save you thousands in up-front software costs as well as deliver a number of efficiencies and time-savings. Managing this transition requires skill, experience and careful cost control. This is where Logisoft can help.

To get started, call Logisoft on 1300 360 746.

Why Cloud?



REAL-TIME DATA ON DEMAND

Accounting and reporting is real-time, accessible anywhere and available on any device.

LOW MAINTENANCE

Upgrades, server maintenance and admin is all managed by the cloud service provider.

MANAGE CASH FLOW

Software costs can be spread over the length of the subscription, saving on up-front lump sum costs.

COLLABORATE

Multi-user access makes it easy to collaborate with your team when working with real-time financial information.

NO NEED TO BACK UP

Your data is stored securely in "the cloud" on the supplier's bank of servers, so there is no need to continually back-up or use your own hard drive.