



AccountingHub

Manage client information and track ongoing work

Product roadmap

Roadmap is continuously updated based on client feedback, last updated 30/04/2018.

The primary features we will build upon include document management (and signatures), customisable forms (incl. onboarding), client communication and task management.

Q1 2018

- May
 - Control staff access to clients in bulk
 - Page aware help and support (continued)
 - QuickBooks API integration (to work alongside Xero and FreeAgent)
 - Dashboard search enhancements to access specific information faster (e.g. directly into documents for a client)
 - Client onboarding research and proof of concept
 - Adapt AccountingHub for other sectors (e.g. pre-built content for bookkeepers)
- June
 - Credit check integration (Credit Safe)
 - Client onboarding release (v1)
 - Support and user experience enhancements
 - Additional form and workflow templates
 - Staff permissioning update

H2 2018

- Companies House director and documents integration (building upon existing search functionality)
- Support for 'draft' forms that can be saved and returned to by a client (with accountant able to advise/view)
- Audit view, all actions are currently logged (GDPR related) but present this data to practice owner so they can review/query
- Refer a practice system
- Custom staff permission system to provide greater flexibility rather than splitting into owner/admin/staff levels
- Email integration (enhancements)
- User features and tools, e.g. set goals for a company

2019

- Enhanced Xero, QuickBooks and other integrations
- Potential for a mobile app release, providing benefits such as offline data
- AccountingHub API, that other systems or developers can integrate with
- Reporting update, new range of interactive reports to analyse key metrics