AccountingHub

Manage client information and track ongoing work

Product roadmap

Roadmap is continuously updated based on client feedback, last updated 08/09/2018.

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

Q4 2018

- September
  - Zapier application launch (currently in Beta)
  - Define signature fields within a PDF rather than appending a new page for signatures
  - Allow users to switch accounts from within the application, avoiding the need for multiple sets of credentials
  - Advanced support for custom fields so they can be associated with specific client information (Summary, VAT, PAYE or Other)
  - Document alerts and notifications will link directly to the client and folder, highlighting the specific document itself
  - Additional branding support to define a specific colour for the left hand navigation bar
  - Recurring workflows will be appended with the frequency, e.g. Payroll September, Payroll October etc.

- October onwards
  - Zapier partnerships and updates
  - Office365 and/or Google Suite integration, focus on improving our email integrations
  - 64-8 integration with HMRC (investigation and prototype)
  - Forms will allow information to be pre-filled for custom fields as well as the existing predefined ones
  - Workflow templates release. This was delayed whilst we upgraded our workflow system based on your feedback
  - Associate client setup with workflows required (e.g. payroll)
  - ‘Magic’ email links or other ways to login to the portal whilst ensuring high security
  - Folder templates, so you do not need to setup the folder structure for each client individually
  - Reduce requirement to invite clients immediately. This would still be strongly recommended but we realise the client portal features may not always be as important to your business
  - Task/workflow import update to match our best in class client import wizard

H1 2019

- Client tasks will provide support for completing a form, making a payment and other options (in addition to existing upload and approval types)
- Integration with client onboarding systems such as Practice Ignition and Go Proposal (discussions in progress)
- User roles for members of the team, allowing workflows to be assigned to appropriate users rather than showing a list of everyone
- Task and workflow reporting focus. Current Report view is quite simple and focuses on tasks rather than workflows
- Reports (cont.), being able to identify exceptions and issues as work is completed
- Zapier enhancements to support client specific use cases and filtering
- Email integration continuous improvement
- Display more of the Companies House data we have retrieved, for example a list of company directors

H2 2019

- Client dashboard refresh, including support for custom information such as links to social media or other content
- Enhanced Xero, QuickBooks and other integrations
- Potential for a mobile app release, providing benefits such as offline data
- Potential AML (Anti-money laundering) integration
- Further work to partner with leading client onboarding systems
- Marketing features and the ability to add / track prospects
- Client and team permissions, this is a complicated update but will allow permissions to be highly configurable