

Achieving operational excellence; Adding Client Value.

Can your reports do this?...

PDF Portrait

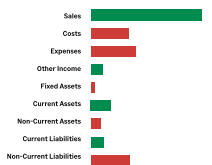
Edit

Sales v Costs

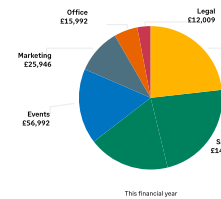
Comparing This year v Last yr v Budget

	Apr 22	May 22	Jun 22	Jul 22	Aug 22	Sep 22	This month vs budget	FY vs LY
Sales								
Group								
Account								
Group								
Account								
Costs								

Cash flow waterfall

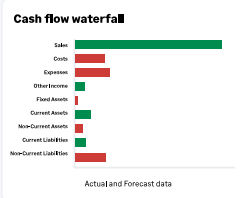
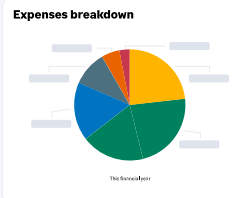
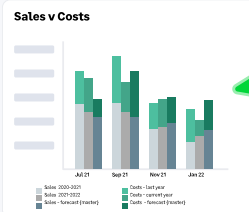


Expenses breakdown



Dashboard PDF Portrait

Reports pack



Widgets Builder

Title override
Expenses this year

Values
Settings: E. SUM.
Expenses

Range
Years: This financial year



You're putting together a management report for your client. How are you doing it? Does it look something like this?...

01

Data Gathering

You collect all the financial data you need from your client.

02

Data Entry

You manually enter into accounting software or spreadsheets. You organise and categorise the data to ensure accuracy.

03

Adjustments

You need to make adjustments to the financial data to comply with accounting standards and regulations. You correct errors, reconcile accounts, and adjust for accruals or prepayments.

04

Financial Statements

You prepare financial statements, including P&L balance sheet, and cash flow statement.

05

Analysis

You analyse the financial statements to identify trends, anomalies, and areas of concern or improvement.

06

Report Generation

You compile the analysed data and insights into a formal report.

07

Client handover

You hand over the document to the client...



If you're putting together reports like this, then you're probably struggling with

- » Manual entry
- » Lack of real-time data
- » Complex spreadsheets
- » Inefficient workflows

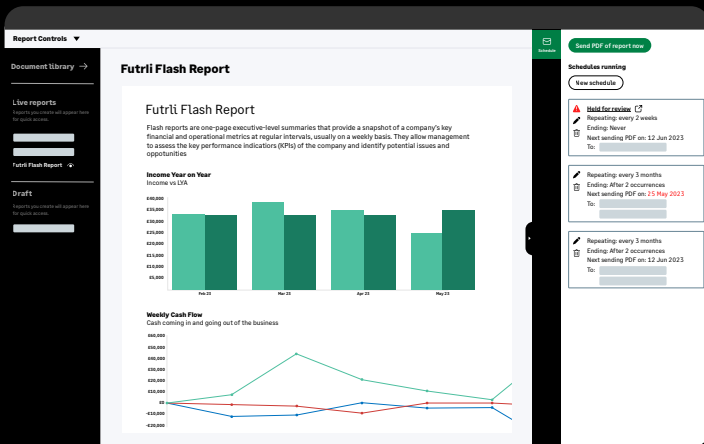
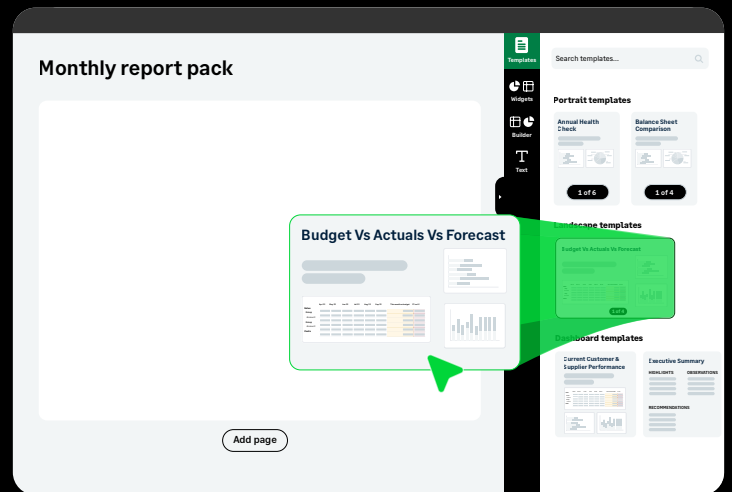
We know how difficult putting together reports can be for your clients. The last thing you need is to be slowed down by the challenges posed by spreadsheets such as time-consuming manual data entry, limited visualisation capabilities, and difficulty with client collaboration.

We have the solution for you...

Our latest reporting features offer significant benefits for accountants and bookkeepers:

Reporting Templates

We have over 70 pre-made reporting templates to kick your advisory services delivery into hyperdrive. These templates enable faster creation of visual insights for clients and support comparisons of different datasets, enhancing advisory penetration and increasing your ROI.

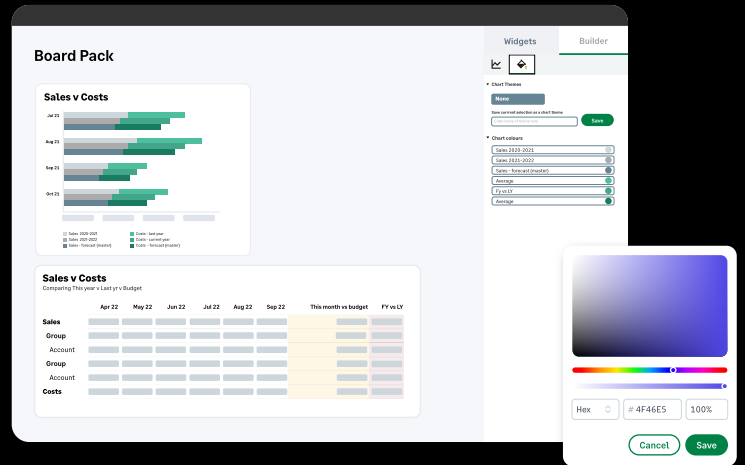


Report Scheduling

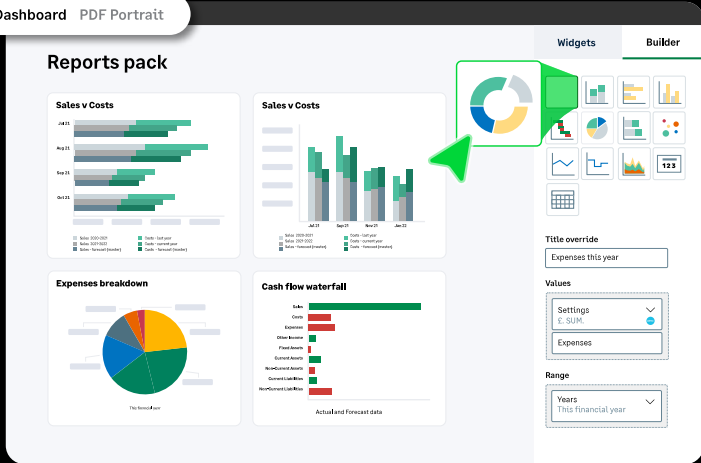
We've introduced report scheduling to streamline the communication of client insights. Scheduling ensures business analysis is in your clients' inboxes exactly when they need it. We've added a review stage, so you get final approval before it lands in your clients' inboxes.

Customisation and Branding

Bespoke branding at the click of a button. Our extensive customisation options allow you to design reports according to clients' unique preferences and needs. This flexibility extends to your branding, enabling you to set up different themes for various clients, enhancing your professional and personal touch.



Dashboard PDF Portrait

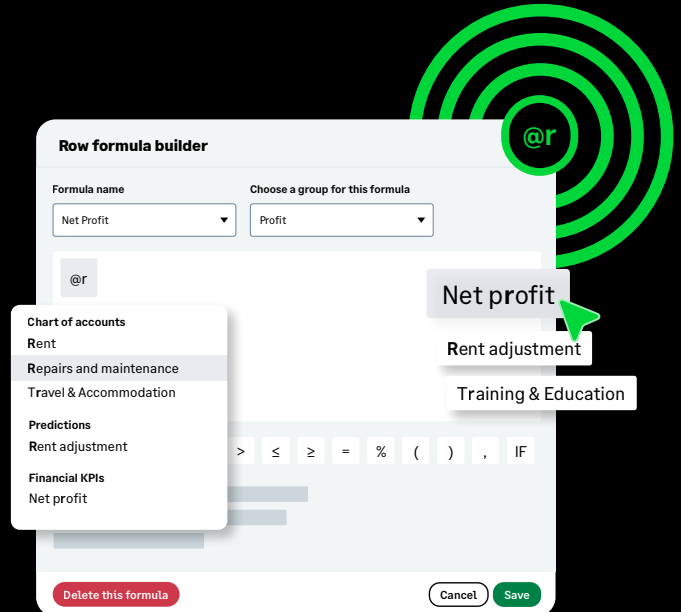


Drag-and-Drop Reporting

We have simplified the reporting process with an intuitive drag-and-drop interface. You can effortlessly create customisable reports, saving time and reducing the complexity of report preparation. This eliminates the need for manual data transfer as it syncs seamlessly with your Sage, Xero, and QuickBooks Online accounts.

Powerful Formula Builder

Our reporting formula builder is robust, offering access to every data point for maximum insights. Your client got a weird reporting request? Don't stress. This feature supports both historical and future datasets, providing you with unparalleled analytical capabilities.

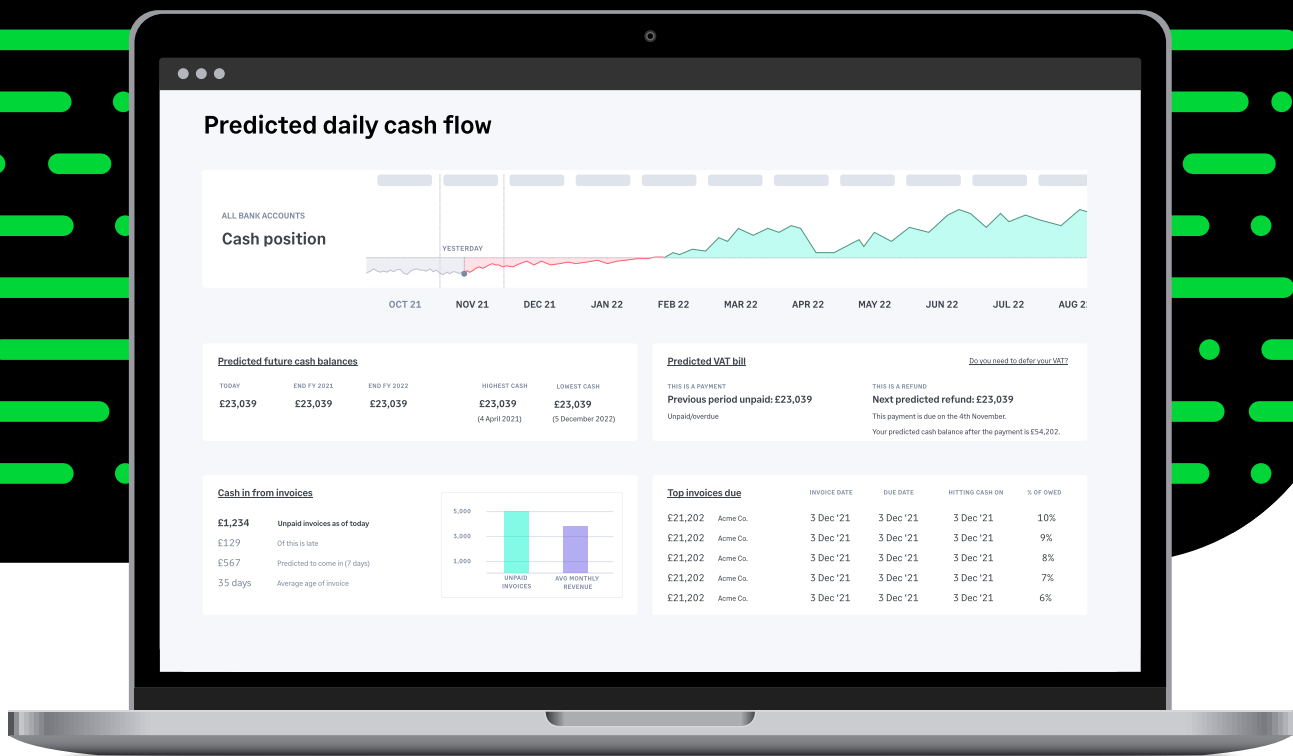
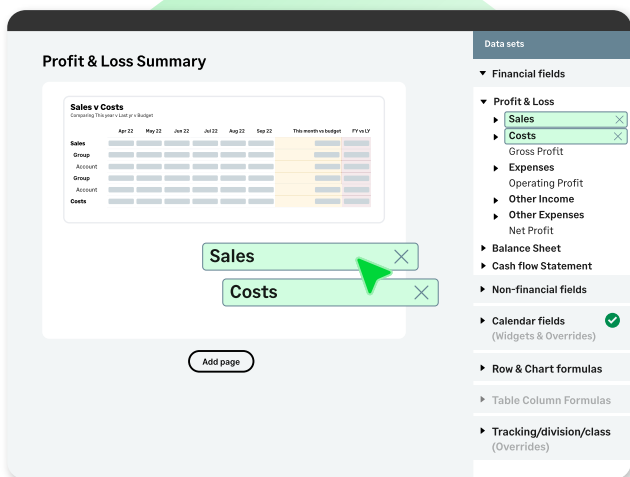


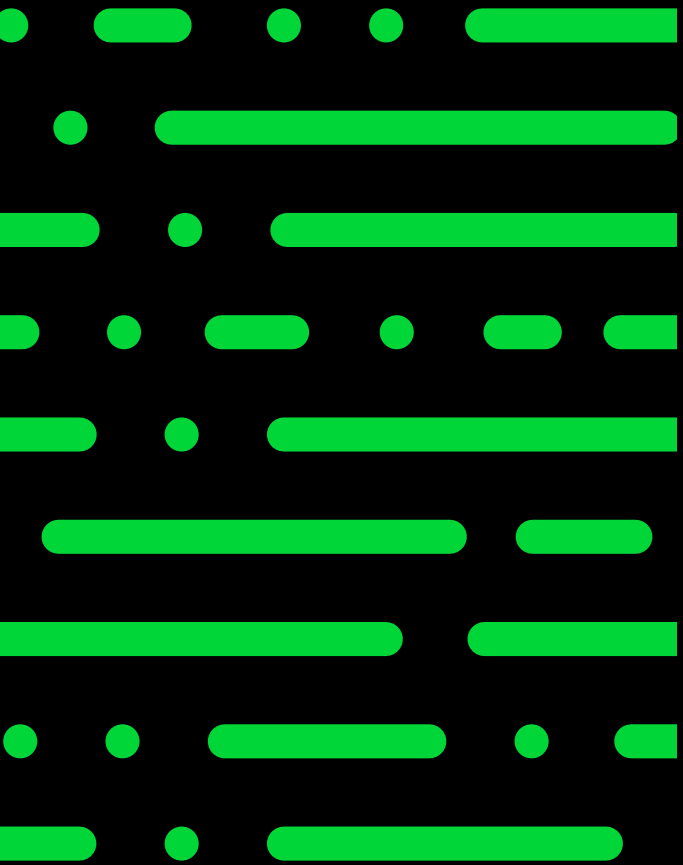
“No one has presented information to our clients like we’re presenting. It’s the way the clients want it, not the way I want it. Futrli allows me to do that. And the clients love it.”

Paul Redmond, Founder of RDA Accountants and bookkeepers

Can your spreadsheets do this? It’s time to enhance your delivery of reports and win back time through Futrli.

Don’t be defeated by your clients’ data... Let data become insights.





34%

Average increase in productivity reported by customers

2.8x

Increase in income reported by Futrli customers in 2021

33%

Increase in available cash reported by customers

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