onepractice

Cloud Document Management for Accountants

Simplify. Automate. Grow your Business

hubone

With over 50 years combined experience in Accountancy and IT industry, HubOne has dedicated the last 10 years building cloud software for accountants.

The OnePractice™ apps are designed specifically to augment Practice Management software by leveraging Microsoft Office 365 and Azure to deliver a document management solution for accounting firms in order to:

Simplify workload   **Enhance collaboration**

Automate processes   **Alleviate time**

Increase productivity   **Grow their business!**

As an Accountant, you probably find yourself juggling multiple clients, multiple deadlines, trying to stay on top of new client and ATO demands, finding ways to accrue CPD hours, and *now* you're being asked to identify upsell opportunities.

If you're a Partner or Owner, you've got the added concerns of maintaining and growing the business, either with existing or new clients, as well as trying to find time to give your customers more face-to-face time. **Take a breath.**

Running any business can be challenging but there are just some things that you shouldn't need to worry about or waste your time doing, like...

- Writing the same documents and emails over and over
- Trying to find that document that was misfiled
- Spending half the day scanning ATO correspondence
- Trying to find an email that was sent to a team members that's now left the business
- Spending far too long saving emails and attachments from clients

Let's think about your practice...

Wouldn't it be great if those worries were a thing of the past? Well they are for OnePractice customers

One**Practice** Document Management
Create. Store. Locate.

At the core of OnePractice is our Document Center which leverages SharePoint to provide a central repository for all of your files, emails and media. It goes beyond storage and gives you the ability to create client sites for document sharing, communication and greater collaboration; cloud and local access; automation; notifications; and more.

The OnePractice tools include:

- Templates
- Mail & Mail Templates
- Scans

What's more, all of the tools integrate with common practice management software and CRMs, so you can save time and streamline workflows.

OnePractice Templates

- Produce documents in seconds for multiple clients at one time
- Create unlimited templates (Word, Excel & emails) with an easy-to-use template builder
- Increase productivity
- Create consistency across your firm
- Reduce errors by extracting information automatically from your practice management software
- Ability to add metadata to identify files
- Personalise documents using your Microsoft credentials
- Automatic filing
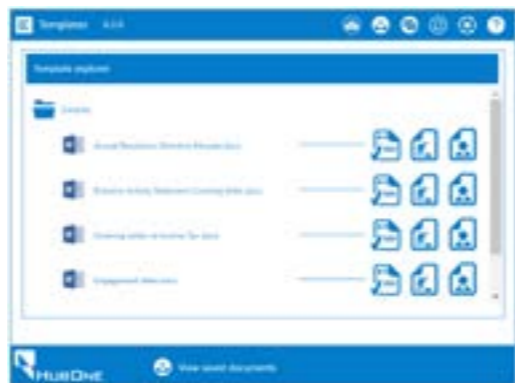
OnePractice Mail & Mail Templates

- Save emails and/or attachments to client folders in your Document Center instantly
- Auto-detect clients and contacts
- Automatic filing
- Save all or select attachments to save
- Easily rename attachments
- Create unlimited email templates
- Send templated emails to multiple clients in seconds
- Store with metadata
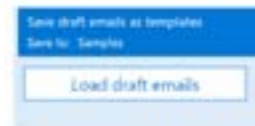
One**Practice** Scans

- Utilising Optical Character Recognition (OCR), documents can automatically be saved to client folders
- No more misfiling or lost documents
- Simply scan-and-go
- Attribute metadata to support search functionality
- Configure auto-renaming of files

And since OnePractice runs on Office 365 Enterprise E3 or above, you also gain access to many other great features and applications.

Keep your data safe & secure with Rights Management Services

Prevent confidential client data leaving your company with Data Loss Prevention

Preserve all sent and received emails with Legal Hold

Unlimited archive and mail storage

Built-in security features, IT support, and a public roadmap

Use Microsoft Teams for internal collaboration and communication, as well as a client portal solution

Create workflows to automate mundane tasks and gain back time with Microsoft Flow

Access add-ons such as Docusign to request client signatures from within SharePoint

Visit the Microsoft Trust Center to learn more about security, compliance and service continuity

And more...

Visit the Microsoft website for more information, the possibilities are endless with Office 365

https://products.office.com/en-au/business/office-365-enterprise-e3-business-software

And there's more...

So how does it all come together?
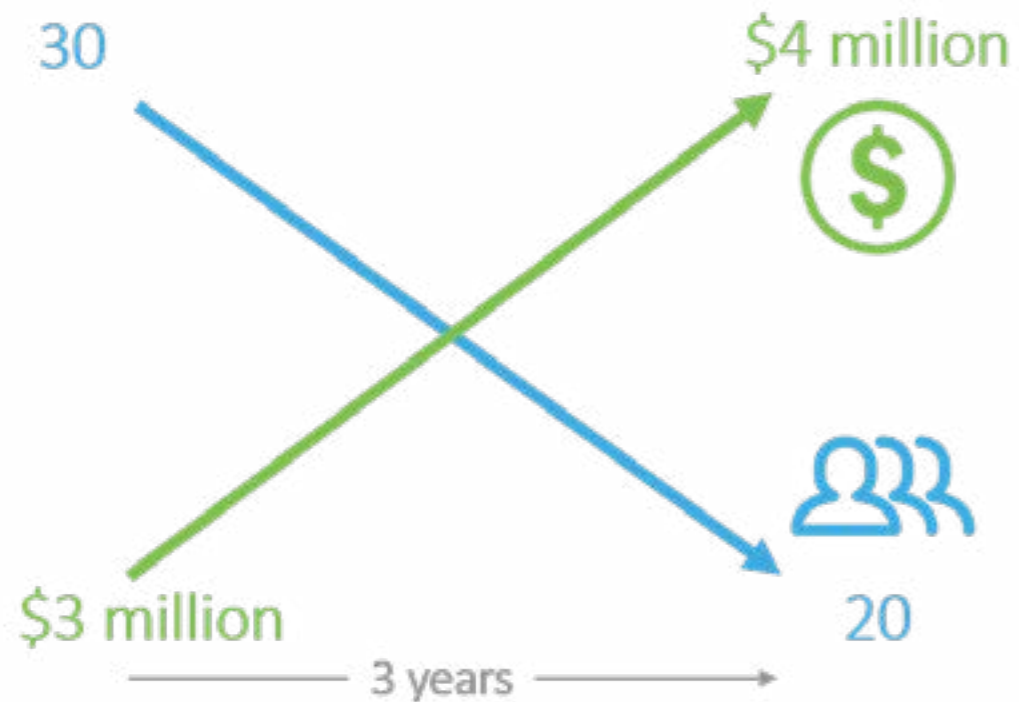
Practice Management Integration
Connect your tools. Connect your team.

Greater collaboration and consistency means greater productivity. That is why OnePractice is designed to integrate with common practice management software.

Gone are the days where you have to go from tool-to-tool extracting information and populating documents manually. When your practice management software is integrated, creating and storing documents is quicker and easier than ever before.

xero   Workflow MAX *a xero product*   CCH iFirm PRACTICE MADE PERFECT   myob

sage   Reckon APS R   Microsoft Dynamics CRM   And more...

Case Study

In 2012, HubOne began working with an accounting practice in Brisbane with 30 full time employees and were achieving an annual revenue of $3million.

Problem

Employees were spending too much time on administrative tasks- creating basic documents, filing, scanning, locating files. More importantly, they weren't making enough revenue to justify 30 employees and unable to grow their client base.

Solution

HubOne introduced the OnePractice suite, including SharePoint's Document Center, change management and training programs to encourage adoption of the tools.

Result

They were able to automate and significantly reduce time on admin, which led them to increase their annual revenue to $4million and with only 20 employees.

Document Management becomes a stress-free and simple experience, and allows accountants to focus on what's really important, their clients and driving revenue.

Schedule a Demo Today

CONTACT US

www.HubOne.com