



## **SOFTWARE TOOLS TO ASSIST IN RUNNING YOUR BUSINESS**

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## SOFTWARE TOOLS TO ASSIST IN RUNNING YOUR BUSINESS

The purpose of this document is to provide a non-exhaustive list of software tools to assist in running a business both from the office or remotely. The software tools contained in this document include those similar to the tools listed in the [SAICA Accounts Production and Accounting Software Guide for Practitioners](#), however additional software tools are included, such as tools to manage your staff and to run meetings virtually.

Whether you are already operating in the cloud or planning on moving your business to a virtual environment, this document contains some of the software tools already used by some of our members.

For items marked \* refer to the [SAICA Accounts Production and Accounting Software Guide for Practitioners](#) for more information on these products.

### Auditing Software

- [CaseWare Assurance engagements](#) \*
- [CaseWare Working Papers](#) \*
- [Confirmation.com](#) \*
- [Draftworx](#) \*
- [TeamMate](#)

### Billing Software

- [Billdozer](#)

### Capturing Accounting Information

- [Cync](#) \*
- [Microsoft Dynamics 365](#) \*
- [M-inent](#)
- [Palladium](#) \*
- [Quickbooks Online Accountant](#) \*
- [QuickConsols](#)
- [SAGE Business Cloud Accounting](#) \*
- [SAP Business One](#) \*
- [SimpleBooks](#)
- [Xero](#) \*

## Communication and Marketing

- Emailer Marketing Tools
  - [Hubspot](#)
  - [Mailchimp](#)
  - [Mailerlite](#)
  
- Newsletters
  - [CADotNews](#)
  
- Proposal Management
  - [GoProposal](#)
  - [PandaDoc](#)
  - [Practice Ignition](#) \*
  
- Social Media
  - Facebook
  - LinkedIn
  - Twitter
  
- Social Media Management
  - [Buffer](#)
  - [Hootsuite](#)
  - [Social Pilot](#)
  - [Sprout Social](#)
  
- Surveys
  - [Google Forms](#)
  - [Kwiksurvey](#)
  - [Survey Monkey](#)
  - [TypeForm](#)

## Data Analytics

- [BST Technology](#)
- [Inflo Software](#) \*
- [Microsoft Power BI](#)
- [Modern Management](#)
- [Qlikview BI Tool](#)
- [Team Mate Data Analytics](#)

## Data Entry

- [AutoEntry](#) \*
- [Receipt Bank](#) \*

## Document Sharing and Storage

- [Box](#)
- [DropBox](#)
- [Google Drive](#)
- [GreatSoft Cloud Document Management System](#) \*
- [OneDrive](#)
- [SharePoint](#)

## Financial Statements

- [CaseWare Cloud](#) \*
- [CaseWare Working Papers](#) \*
- [Draftworx Cloud](#) \*
- [SAGE Business Cloud Accounting](#) \*

## Inventory Control

- [Unleashed](#) \*

## Managing Staff

- Communicating with Staff
  - Email
  - [Hubstaff](#)
  - Phone
  - [Slack](#)
  - SMS
  - [Telegram](#)
  - WhatsApp
  - [Yammer](#)
  
- Practice Management
  - [AccFin Sky Time](#)
  - [CaseWare Practice Management](#) \*
  - [GreatSoft Practice Management](#) \*
  - [PMA3](#)
  - [Xero Practice Manager](#) \*
  - [Xero Workpapers](#) \*
  
- Project Management
  - [Asana](#)
  - [KarbonHQ](#)
  - [Microsoft Planner](#)
  - [Monday.com](#)
  - [New GX Advisory](#) \*
  - [SmartSheet](#)
  - [Trello](#)
  - [Workflow Max](#)
  
- Staff Morale
  - [Headspace](#)
  - [Hi5](#)
  - [MyGrow](#)

- [TinyPulse](#)

### Note-taking

- [EverNote](#)
- [OneNote](#)

### Payment Processing

- [eftsure](#)
- [Netcash](#)
- [PayFast](#) \*
- [PayPal](#)
- [Peach Payments](#)

### Payroll Solutions

- [AccFin Sky Payroll](#)
- [GreatSoft Payroll](#) \*
- [GreatSoft Payroll Lite](#)
- [Intercode](#)
- [PaySpace Payroll Software](#) \*
- [SAGE Business Cloud Payroll](#)
- [SAGE Pastel Payroll](#)
- [Simple Pay](#)

### PDF Printers

- [Acrobat Adobe](#)
- [Cute PDF Printer](#)
- [I Love PDF](#)



## Point of Sale

- [InTouch POS](#)
- [Kounta](#) \*
- [Shopify eCommerce & Point of Sale](#) \*
- [TallOrder Point of Sale](#) \*
- [Vend](#)

## Reporting

- [Futrli](#) \*
- ProfitQube\*
- [Spotlight Reporting](#) \*
- [Syft Analytics](#) \*

## Scanning of Documents

- Various applications available on smartphones:
  - [Adobe](#)
  - Scanner App
    - [Android](#)
    - [iPhone](#)

## Secretarial Software

- [AccFin Sky Secretarial](#)
- [Caseware Secretarial](#)
- [GreatSoft Secretarial](#) \*

## Signing of Documents

- [Acrobat Adobe](#)
- [DocuSign](#)
- [Online PDF signer](#)
- [PandaDocs](#)
- [SignNow](#)

## Tax

- [AccFin Sky Tax](#)
- [CaseWare Tax](#)
- [GreatSoft Tax](#) \*
- [Taxtim](#)

## Transfer of Large Files

- [WeTransfer](#)

## Virtual Meeting Platforms

- [CrowdCast](#)
- [Google Hangouts](#)
- [GoToMeeting](#)
- [Hopin](#)
- [Microsoft Teams](#)
- [Skype](#)
- [Zoom](#)

## Virtual White boarding/Strategy

- [FunRetro](#)
- [Miro](#)