

Bookkeeping Analysis: The Client View

The **Client View** under the **Bookkeeping Analysis** tab gives you real-time visibility of each of your client's bookkeeping process, helping you prioritize your work for the day and avoid unpleasant surprises.

Metrics give you an at-a-glance view of how many items require your input, how often your clients are submitting them, and how many they still need submit so you can reconcile their bank accounts.

Click on each of the metrics below to find out more...

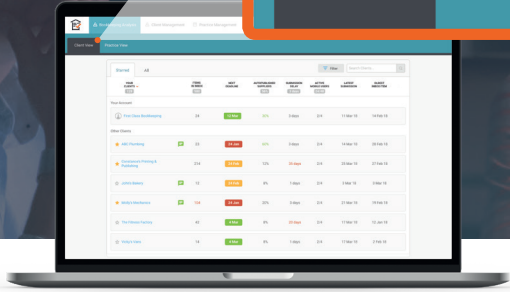
Starred

All

Filter

Search Clients...

YOUR CLIENTS 128	ITEMS IN INBOX 580	NEXT DEADLINE	AUTOPUBLISHED SUPPLIERS 56%	SUBMISSION DELAY 3 days	ACTIVE MOBILE USERS 24/48	LATEST SUBMISSION	OLDEST INBOX ITEM
Your Account							
<div><div></div><div>First Class Bookkeeping</div></div>	24	12 Mar	30%	3 days	2/4	11 Mar 18	14 Feb 18
Other Clients							
<div><div>★</div><div>ABC Plumbing</div><div><div></div></div></div>	23	24 Jan	60%	3 days	2/4	14 Mar 18	20 Feb 18
<div><div>★</div><div>Constance's Printing & Publishing</div><div><div></div></div></div>	214	24 Feb	12%	35 days	2/4	25 Mar 18	27 Feb 18
<div><div>☆</div><div>John's Bakery</div><div><div></div></div></div>	12	24 Feb	8%	1 days	2/4	3 Mar 18	3 Mar 18
<div><div>★</div><div>Molly's Mechanics</div><div><div></div></div></div>	104	24 Jan	20%	3 days	2/4	21 Mar 18	19 Feb 18



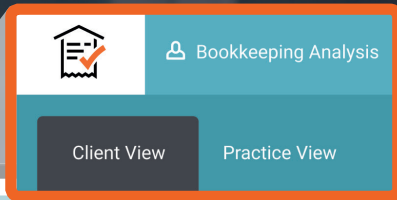
The **Client View** under the **bookkeeping Analysis** tab gives you real-time visibility of each of your client's bookkeeping process, helping you prioritize your work for the day and avoid unpleasant surprises.

Click on each of the metrics below to find out more...

STARRED CLIENTS

This field allows you to highlight specific clients, which will appear under the **'Starred'** tab, so you can focus on those you work on exclusively, or provide a particularly high level of service.

If you star any clients, the **'Starred'** tab will be your default view on login.



Bookkeeping Analysis: The Client View

The **Client View** under the **Bookkeeping Analysis** tab gives you real-time visibility of each of your client's bookkeeping process, helping you prioritize your work for the day and avoid unpleasant surprises.

Metrics give you an at-a-glance view of how many items require your input, how often your clients are submitting them, and how many they still need submit so you can reconcile their bank accounts.

Click on each of the metrics below to find out more...

Starred

All

YOUR CLIENTS

128

Your Account

First Class Bookkeeping

Other Clients

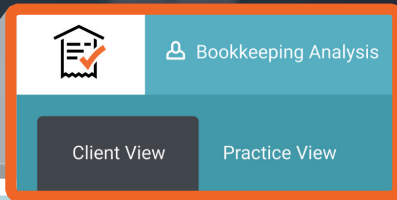
★ ABC Plumbing

★ Constance's Printing & Publishing

★ John's Bakery

★ Molly's Mechanics

ITEMS IN INBOX	NEXT DEADLINE	AUTOPUBLISHED SUPPLIERS	SUBMISSION DELAY	ACTIVE MOBILE USERS	LATEST SUBMISSION	OLDEST INBOX ITEM
580		56%	3 days	24/48		
24	12 Mar	30%	3 days	2/4	11 Mar 18	14 Feb 18
UNREAD MESSAGES NOTIFICATION						
A green icon in this column indicates that you have unread messages from clients on the items in their inbox.						
Clicking the icon will take you to the latest unread message. Items with unread messages are highlighted with identical icons in the inbox itself.						
			3 days	2/4	14 Mar 18	20 Feb 18
			35 days	2/4	25 Mar 18	27 Feb 18
			1 days	2/4	3 Mar 18	3 Mar 18
			3 days	2/4	21 Mar 18	19 Feb 18



Bookkeeping Analysis: The Client View

The **Client View** under the **Bookkeeping Analysis** tab gives you real-time visibility of each of your client's bookkeeping process, helping you prioritize your work for the day and avoid unpleasant surprises.

Metrics give you an at-a-glance view of how many items require your input, how often your clients are submitting them, and how many they still need submit so you can reconcile their bank accounts.

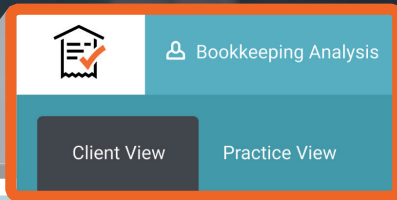
Click on each of the metrics below to find out more...

<div>Starred</div> <div>All</div>		<div><div>Filter</div><div>Search Clients...</div><div></div></div>					
YOUR CLIENTS	ITEMS IN INBOX	NEXT DEADLINE	AUTOPUBLISHED SUPPLIERS	SUBMISSION DELAY	ACTIVE MOBILE USERS	LATEST SUBMISSION	OLDEST INBOX ITEM
128	580		56%	3 days	24/48		
Your Account							
<div><div></div><div>First Class Bookkeeping</div></div>	24	12 Mar	30%	3 days	2/4	11 Mar 18	14 Feb 18
Other Clients							
<div><div>★</div><div>ABC Plumbing</div><div></div></div>	23						
<div><div>★</div><div>Constance's Printing & Publishing</div><div></div></div>	214						
<div><div>☆</div><div>John's Bakery</div><div></div></div>	12						
<div><div>★</div><div>Molly's Mechanics</div><div></div></div>	104						

ITEMS IN INBOX

This is the total number of items in each of your client's inboxes, that have had their data extracted by Receipt Bank.

These items may be ready to publish or export to your accounting software, or require additional input - in any case, this metric gives you an idea of how much work there is to do in Receipt Bank immediately.



Bookkeeping Analysis: The Client View

The **Client View** under the **Bookkeeping Analysis** tab gives you real-time visibility of each of your client's bookkeeping process, helping you prioritize your work for the day and avoid unpleasant surprises.

Metrics give you an at-a-glance view of how many items require your input, how often your clients are submitting them, and how many they still need submit so you can reconcile their bank accounts.

Click on each of the metrics below to find out more...

Starred

All

YOUR CLIENTS

128

ITEMS IN INBOX

580

NEXT DEADLINE

AUTOPUBLISHED SUPPLIERS

56%

SUBMISSION DELAY

3 days

ACTIVE MOBILE USERS

24/48

LATEST SUBMISSION

OLDEST INBOX ITEM

Your Account

First Class Bookkeeping

24

12 Mar

Other Clients

★

ABC Plumbing

23

24 Jan

★

Constance's Printing & Publishing

214

24 Feb

☆

John's Bakery

12

24 Feb

★

Molly's Mechanics

104

24 Jan

Filter

Search Clients...

NEXT DEADLINE

Here you can set a date for the next deadline or interaction with a client. Simply click on the date field and select a deadline in the pop-up. You can set these to recur at regular intervals depending on your bookkeeping arrangements so that your relations are on track.

Deadlines in the future are **GREEN**, those in the next 2 days are **AMBER**, and missed deadlines are **RED**.

11 Mar 18

14 Feb 18

14 Mar 18

20 Feb 18

25 Mar 18

27 Feb 18

3 Mar 18

3 Mar 18

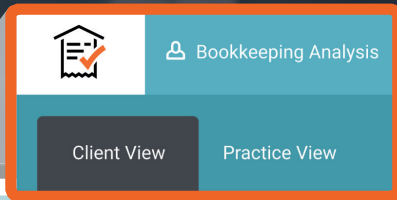
21 Mar 18

19 Feb 18

NEXT DEADLINE

Here you can set a date for the next deadline or interaction with a client. Simply click on the date field and select a deadline in the pop-up. You can set these to recur at regular intervals depending on your bookkeeping arrangements so that your relations are on track.

Deadlines in the future are **GREEN**, those in the next 2 days are **AMBER**, and missed deadlines are **RED**.



Bookkeeping Analysis: The Client View

The **Client View** under the **Bookkeeping Analysis** tab gives you real-time visibility of each of your client's bookkeeping process, helping you prioritize your work for the day and avoid unpleasant surprises.

Metrics give you an at-a-glance view of how many items require your input, how often your clients are submitting them, and how many they still need submit so you can reconcile their bank accounts.

Click on each of the metrics below to find out more...

Starred

All

YOUR CLIENTS

128

ITEMS IN INBOX

580

NEXT DEADLINE

AUTOPUBLISHED SUPPLIERS

56%

SUBMISSION DELAY

3 days

ACTIVE MOBILE USERS

24/48

LATEST SUBMISSION

OLDEST INBOX ITEM

Your Account

First Class Bookkeeping

24

12 Mar

30%

3 days

2/4

11 Mar 18

14 Feb 18

Other Clients

★

ABC Plumbing

23

24 Jan

60%

★

Constance's Printing & Publishing

214

24 Feb

12%

☆

John's Bakery

12

24 Feb

8%

★

Molly's Mechanics

104

24 Jan

20%

AUTOPUBLISHED SUPPLIERS

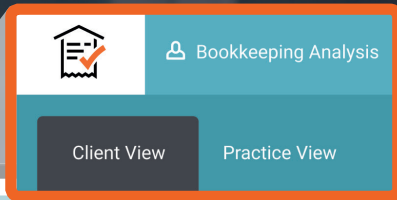
This details what percentage of each client's suppliers' are configured to automatically publish items to your cloud accounting package.

Autopublishing can be set up on a supplier-by-supplier basis from the 'Supplier Rules' section of the 'Receipt Details' page or under the 'Suppliers' tab.

AUTOPUBLISHED SUPPLIERS

This details what percentage of each client's suppliers' are configured to automatically publish items to your cloud accounting package.

Autopublishing can be set up on a supplier-by-supplier basis from the **'Supplier Rules'** section of the **'Receipt Details'** page or under the **'Suppliers'** tab.



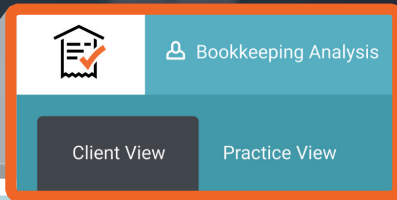
Bookkeeping Analysis: The Client View

The **Client View** under the **Bookkeeping Analysis** tab gives you real-time visibility of each of your client's bookkeeping process, helping you prioritize your work for the day and avoid unpleasant surprises.

Metrics give you an at-a-glance view of how many items require your input, how often your clients are submitting them, and how many they still need submit so you can reconcile their bank accounts.

Click on each of the metrics below to find out more...

Starred					Filter			
All					Search Clients...			
YOUR CLIENTS		ITEMS IN INBOX	NEXT DEADLINE	AUTOPUBLISHED SUPPLIERS	SUBMISSION DELAY	ACTIVE MOBILE USERS	LATEST SUBMISSION	OLDEST INBOX ITEM
128		580		56%	3 days	24/48		
Your Account								
First Class Bookkeeping		24	12 Mar	30%	3 days	2/4	11 Mar 18	14 Feb 18
Other Clients								
★ ABC Plumbing		23	24 Jan	60%	3 days	SUBMISSION DELAY Submission Delay is the average number of days between the date of an invoice or receipt, and the date it was submitted to Receipt Bank. This is a good indicator of which clients might need additional onboarding.		
★ Constance's Printing & Publishing		214	24 Feb	12%	35 days			
★ John's Bakery		12	24 Feb	8%	1 days			
★ Molly's Mechanics		104	24 Jan	20%	3 days			



Bookkeeping Analysis: The Client View

The **Client View** under the **Bookkeeping Analysis** tab gives you real-time visibility of each of your client's bookkeeping process, helping you prioritize your work for the day and avoid unpleasant surprises.

Metrics give you an at-a-glance view of how many items require your input, how often your clients are submitting them, and how many they still need submit so you can reconcile their bank accounts.

Click on each of the metrics below to find out more...

Starred

All

YOUR CLIENTS

128

ITEMS IN INBOX

580

NEXT DEADLINE

AUTOPUBLISHED SUPPLIERS

56%

SUBMISSION DELAY

3 days

ACTIVE MOBILE USERS

24/48

LATEST SUBMISSION

OLDEST INBOX ITEM

Your Account

First Class Bookkeeping

24

12 Mar

30%

3 days

2/4

11 Mar 18

14 Feb 18

Other Clients

★

ABC Plumbing

23

24 Jan

60%

3 days

2/4

★

Constance's Printing & Publishing

214

24 Feb

12%

35 days

2/4

☆

John's Bakery

12

24 Feb

8%

1 days

2/4

★

Molly's Mechanics

104

24 Jan

20%

3 days

2/4

Filter

Search Clients...

ACTIVE MOBILE USERS

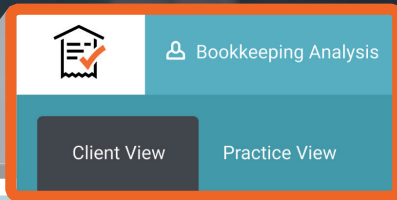
How many users on each client account have submitted through the Receipt Bank mobile app within the last 30 days. Ensuring that they have the app on their mobile device not only gives your clients the best submission experience, but also allows you to message them about specific issues directly through the app.

Clicking on the metric will take you directly to the 'Maintain Users' page where you can send an SMS invitation to any user, with a link to download the app from the app store.

ACTIVE MOBILE USERS

How many users on each client account have submitted through the Receipt Bank mobile app within the last 30 days. Ensuring that they all have the app on their mobile device not only gives your clients the best submission experience, but it also allows you to message them about specific items directly through the app.

Clicking on the metric will take you directly to the **'Maintain Users'** page where you can send an SMS invitation to any user, with a link to download the app from the app store.

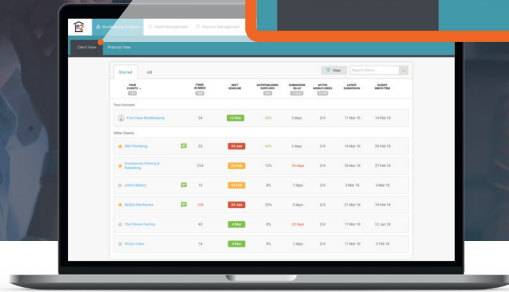


Bookkeeping Analysis: The Client View

The **Client View** under the **Bookkeeping Analysis** tab gives you real-time visibility of each of your client's bookkeeping process, helping you prioritize your work for the day and avoid unpleasant surprises.

Metrics give you an at-a-glance view of how many items require your input, how often your clients are submitting them, and how many they still need submit so you can reconcile their bank accounts.

Click on each of the metrics below to find out more...



Starred

All

Filter

Search Clients...

YOUR CLIENTS	ITEMS IN INBOX	NEXT DEADLINE	AUTOPUBLISHED SUPPLIERS	SUBMISSION DELAY	ACTIVE MOBILE USERS	LATEST SUBMISSION	OLDEST INBOX ITEM
128	580		56%	3 days	24/48		
Your Account							
<div><div></div><div>First Class Bookkeeping</div></div>	24	12 Mar	30%	3 days	2/4	11 Mar 18	14 Feb 18
Other Clients							
<div><div>★</div><div>ABC Plumbing</div><div></div></div>	23	24 Jan				14 Mar 18	20 Feb 18
<div><div>★</div><div>Constance's Printing & Publishing</div><div></div></div>	214	24 Feb				25 Mar 18	27 Feb 18
<div><div>☆</div><div>John's Bakery</div><div></div></div>	12	24 Feb				3 Mar 18	3 Mar 18
<div><div>★</div><div>Molly's Mechanics</div><div></div></div>	104	24 Jan				21 Mar 18	19 Feb 18

LATEST SUBMISSION

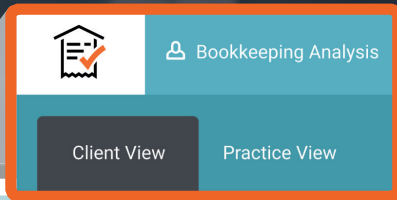
This is the date on which the last item was submitted to Receipt Bank.

If this is too old a client might cause chaos by sending items in bulk and draining your team's resources, so use it to open conversation with clients and remind them of their bookkeeping.

LATEST SUBMISSION

This is the date on which the last item was submitted to Receipt Bank.

If this is too old a client might cause chaos by sending items in bulk and draining your team's resources, so use it to open conversation with clients and remind them of their bookkeeping.



Bookkeeping Analysis: The Client View

The **Client View** under the **Bookkeeping Analysis** tab gives you real-time visibility of each of your client's bookkeeping process, helping you prioritize your work for the day and avoid unpleasant surprises.

Metrics give you an at-a-glance view of how many items require your input, how often your clients are submitting them, and how many they still need submit so you can reconcile their bank accounts.

Click on each of the metrics below to find out more...

Starred		All		Filter		Search Clients...			
YOUR CLIENTS		ITEMS IN INBOX		NEXT DEADLINE		AUTOPUBLISHED SUPPLIERS		SUBMISSION DELAY	
128		580				56%		3 days	
						24/48			
								LATEST SUBMISSION	
						</			