Dext

Case study

Aprio Cloud

How Aprio Cloud became
a leader in US-based cloud
accounting with Dext

25,000 receipts

processed in just nine months
for one client only

Dext

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Melanie Lusnak
Innovation Architect
Aprio Cloud

The Atlanta-based cloud accounting, tax, and advisory firm Aprio Cloud has eyes on the future. Their solution utilizes a 50+ application-strong technology stack to boost their clients' productivity and business success.

Dext has become a key factor in this technology-driven strategy by providing data accuracy and automation, allowing Aprio Cloud's financial advisors to gather proper documentation and automatically code items.

"Dext is an essential tool in our tech stack. The time it saves by assisting with automatically coding receipts means we have more time to spend advising our clients. Having the backup documentation for transactions gives us and our clients peace of mind if it's needed for auditing or tax purposes," says Melanie Lusnak, Aprio Cloud Innovation Architect.

Integration specialists

For Aprio Cloud, expanding their app marketplace means including software able to integrate with a variety of tools such as; Bill.com, Xero, QBO, along with individual vendors and banks. Dext integrates with all, taking it a step further by quickly processing financial documents and sending them to the correct application. Clients pay bills faster and more accurately while seeing the real-time effect on their financials with integrations to their preferred accounting systems. Time is saved by automatically pulling invoices from specific vendors instead of relying on the client to forward an email or download a document.

How receipt bank helps aprio cloud's expert advisors

Aprio Cloud's advisors serve a variety of businesses and finance professionals as their clients. By including Dext in their offerings, they are tackling the issue of manual entry. Dext's receipt capture feature allows Aprio Cloud's clients to view purchases in real-time while plugging this information into a single dashboard. They can also automate submission reminders, store sensitive information securely in one place, convert transactions into any chosen currency and integrate with leading accounting, payroll, and payment software solutions.

Growing together

Small businesses empower the nation's economy; helping them is helping everyone. Aprio Cloud has developed a team of virtual experts to support their range of technology solutions available for start-ups, mid-tier, and established high-growth businesses. Dext's software makes it easy for both financial advisors and their clients to manage sales and expenses, regardless of business size. Dext helps business owners keep track of their customer invoices by storing sales information into a Sales Workspace. All information is searchable, secure, and streamlined meaning records can be moved over

Dext

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to any integrated software. Expense management is made simple, with Dext's Effortless Expense Reports. Clients can create, populate and complete expense reports for their employees. For each employee added, a new report is automatically created at regular intervals to make processing quick and easy.

"Dext's software makes it easy for both financial advisors and their clients to manage business expenses, regardless of business size."

Supplying success

With Dext and Aprio Cloud, the company Supply Brothers were able to process 25,000 receipts in just nine months, says Daniel Wyka, President of Supply Brothers, Inc. "Since starting with Aprio Cloud in April 2019 - it has been such an incredible experience which has delivered above my highest expectations. Working with Aprio has been a true asset to my small business. The systems we have implemented have helped me better understand our company, and has allowed us to grow our revenue by almost 70% in one year. I can also say that every member of Aprio has worked quickly, and effectively, well beyond my expectations, and they will always find out the answer and get back to me when things come up instead of just brushing me off, or leaving me to try and figure something out." According to Lusnak, the addition of Dext in their offerings has opened up more growth opportunities for their client base. "For clients like Supply Brothers who have thousands of receipts, it's next to impossible to keep up with the amount of information manually. Having Dext integrated into our tech stack saves time so that clients can look at their financials and get a clear view of where their business stands right now versus a month ago. At Aprio Cloud, each of our tools plays a vital role in how our clients run their businesses. Being able to use each tool and customize the functionality to a specific client or industry increases our efficiency. It gives us more time to advise clients on important decisions down the road."

Ready to redefine business advisory?

Book a consultation with a member of our team.

dext.com/get-in-touch