

# Aptus Accounting & Advisory Customer Spotlight

[www.aptusadvisory.com.au](http://www.aptusadvisory.com.au)

The Sydney-based firm counts on Dropbox Business and Xero Tax for secure, user-friendly file sharing and storage that allows accountants and clients to easily collaborate on strategies that lead to greater financial success.



## Key Results



More effective collaboration with clients



Expedited workflows and improved productivity



Increased security, with password protection

“We’ve essentially been able to go completely paperless. Tax returns used to require a lot of manual sharing—printing, signing, scanning—but now we put an unsigned doc in Dropbox Business, the client electronically signs it, and a copy is automatically saved right back into their folder in Xero Tax.”



James Solomons, Director and Co-Founder, Aptus Accounting and Advisory

## THE CHALLENGE

### A gap in communication

When James Solomons and Rebecca Mihalic started Aptus Accounting & Advisory, they set out to connect clients with the insight and resources needed for financial success and growth. Effective collaboration between Aptus and clients was key to delivering on this mission—but, unfortunately, the company’s document management system wasn’t up to the task. It was cumbersome for clients to log into, and caused struggles around file version control and syncing. Director and Co-Founder James Solomons explains, “When you’re aiming to make life easier for clients, not being able to share information with them goes against everything you’re trying to accomplish. We needed a solution that was user friendly.”

As personal users of Dropbox, the Aptus team knew the application made sharing incredibly easy. So, when the founders discovered that Dropbox Business integrated with Xero Tax, there was no question it was the right fit for Aptus.

## THE SOLUTION

### Smart integration, secure collaboration

After deploying Dropbox Business, collaboration with clients immediately became easier for the Aptus team. Now clients and accountants work together on everything from budget reviews to forecasts to business planning, all from shared folders. They can even communicate within specific documents by adding in-file notes.

Thanks to the Xero integration, the process of sending and sharing signed documents, like tax returns, has also become significantly simpler. Solomons says, “We’ve essentially been able to go completely paperless. Tax returns used to require a lot of manual sharing—printing, signing, scanning—but now we put an unsigned doc in Dropbox Business, the client electronically signs it, and a copy is automatically saved right back into their folder.”

Because Aptus often shares very sensitive data, Dropbox Business features like two-step authentication are appreciated by both employees and clients. “Email is such an unsecure way of moving

information,” adds Solomons. “We have a professional responsibility to keep clients’ data secure at all times, and the fact that Dropbox Business can give us clear visibility into who is sharing and how documents are being shared lets us sleep better at night.”

## THE RESULTS

### Expediting client success

One of the biggest impacts Aptus has realised since setting up Dropbox Business is time-savings. When the company relied on its document management system and email to store and share files, a significant amount of time was spent moving documents and hunting for correct

versions. Even just five minutes of that multiplied by the company's 800 clients added up to hours upon hours of lost productivity.

But with Dropbox Business, productivity has increased. In fact, Solomons estimates that Aptus has seen about a 90% productivity gain around the process of obtaining tax return signatures. The e-signature capability that's possible with Dropbox and Xero enables for a highly expedited workflow—and that's good for employees and clients. As Solomons says, “In our line of service, time is money. Any time wasted on finding, saving, or sharing files takes away from time we could be devoting to clients. Dropbox Business helps us streamline everything and work with clients quickly and easily—so we can make real progress for them.”

#### Use case

#### How Dropbox Business helps

Collaboration	Accountants and clients work together within documents, devising cooperative strategies for business growth.
Sharing	Employees can easily distribute documents and clients can send file requests when they need additional information to be shared.
Control	Features like two-step authentication help keep shared data secure, and administrative controls allow for file access privileges to be easily revoked if someone leaves the company.

“Our clients are very happy with Dropbox Business. The fact that we can drop all of their end-of-year tax returns into one password-protected folder and share that folder with them—they love it.”



James Solomons, Director and Co-Founder,  
Aptus Accounting and Advisory

Discover how your organisation can simplify collaboration and save time with Dropbox Business.

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