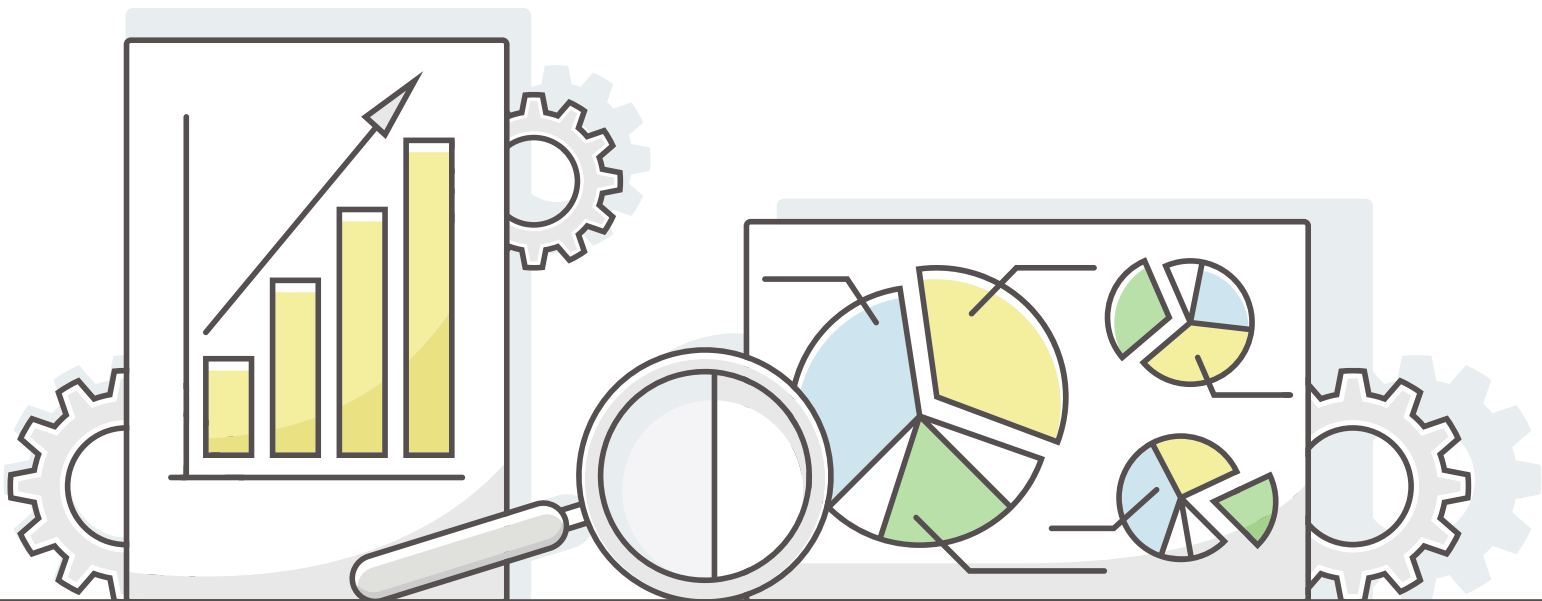


OUTSOURCED ACCOUNTING TECHNOLOGY GUIDE



WINDHAM BRANNON
offering more

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INTRODUCTION

The increase in outsourced accounting and bookkeeping support services can be traced to a confluence of trends, most notably technology, growing operational complexity and the need for businesses and not-for-profits to function as efficiently as possible.

TECHNOLOGY AND INTEGRATION

Increasing demand for cloud services has fueled growth in digital accounting platforms such as QuickBooks Online, Xero, Sage Intacct, Oracle NetSuite and other accounting-oriented solutions. In addition, many platforms have been created to serve the specialized needs of key industries such as Aljex (freight brokers), EFI Pace (printers), Elite and SurePoint Technologies (legal), Workamajig (creative agencies) and Yardi's Breeze and Voyager platforms (real estate).

Integration of accounting and bookkeeping functions with these platforms has helped further increase demand for cloud-based accounting services such as bank account linkage, automatic payments and merchant services, as well as integrated applications like Bill.com, Expensify, Square, Tsheets and PayPal.

THE IDEAL 'TECH STACK'

At its core, the growth in outsourced accounting services is characterized by the need for organizations to construct the ideal "tech stack" capable of producing the real-time data they need to make sound business decisions based on their business' volume, complexity and sales pace.

In the context of outsourced accounting and bookkeeping, a "tech stack" is the configuration of technology solutions and integrations used to manage an organization's accounting and financial reporting. The ideal tech stack for one company may be different from that of other companies.

A customized configuration of accounting technology capabilities is key to getting the most out of a cloud-based financial management system.

INCREASING COMPLEXITY

Businesses and not-for-profits are looking for solutions that are highly specific to their industries and needs, which drive technology developers to create more apps and integration.

INTRODUCTION

But with expanding capabilities and more complex integrated applications, many business and not-for-profit finance professionals have found they are not familiar with all the platforms and don't have the time to train, making outsourcing more attractive. Working with professionals who are well-versed in technology enables them to find customized solutions.

EFFICIENCY

Outsourcing allows an organization to realize efficiency by offering fractional professional accounting services. If your organization's accounting and bookkeeping can be managed in 20 hours per week, why pay an accountant for a 40-hour week?

By outsourcing, you can direct your resources to outsourced professionals with a combination of skill levels, as well as the appropriate technology mix to achieve your organization's goals.

Industry surveys have shown that 80 percent of organizations that outsource all accounting functions report more time to focus on their core business, and 28 percent report increased profit as a result of better decision making.

HOW TO GET THE MOST OUT OF THIS EBOOK

We have published our *Outsourced Accounting Technology Guide* to illustrate how outsourced accounting services could be of value to your organization and help you understand the various pieces that constitute cloud-based accounting and finance services.

Section 1 explains the major cloud-based platforms used by businesses and not-for-profits, detailing what they do, who uses them and some of their pros and cons.

Section 2 dives into the popular integrations and add-ons that are available, what they do, which platforms they integrate with, who uses them and some of their pros and cons.

We have also included a [glossary of terms](#) to help you understand the various sections of outsourced accounting, as well as tips on [how to outsource effectively](#).

Would You Like a Complimentary Consultation?

Reach out to our Client Accounting Services Team to start the conversation. We look forward to serving you and your business accounting needs.

HOW TO OUTSOURCE EFFECTIVELY

If you're considering outsourcing some or all your organization's accounting functions, here are a few best practices:

- **Work with a provider who understands your space, whether your organization is a business or a not-for-profit.**
- **Consider which accounting functions you want to outsource first. Many organizations start by outsourcing accounts payable and accounts receivable, then move on to additional functions.**
- **Before embarking on an outsourcing relationship, talk with your provider about how you will work together. Some of the questions you might ask are:**
 - ▷ How will they work with your internal accounting staff or with you directly?
 - ▷ How often will they be in communication?
 - ▷ What are their procedures for dealing with problems that may arise?
 - ▷ What are their billing practices and how will they handle additional billings that may arise from unexpected issues?
 - ▷ What will their monthly reports look like?

Getting answers to these questions will help you find the right fit with an outsourced provider who understands your needs.

PLATFORMS

WEIGH THE OPTIONS



PLATFORMS



INDUSTRIES

- General
- Not-for-profit
- Small business

PROS

- Affordable
- Easy to access from any device
- Easy to find and fix errors
- Easy to look up customer information
- Easy to use and learn
- Integrates with third-party apps
- User-friendly interface

CONS

- Can be slow
- Limits on number of transactions
- Limits on number of users
- Occasional system crashes

WHAT DOES IT DO?

- Accounts payable
- Manage and pay bills
- Prepare 1099s
- Run sales and profit reports
- Send and track invoices
- Send estimates
- Sync with bank accounts
- Track income and expenses
- Track inventory
- Track sales tax
- Track time

INTEGRATIONS

- Bill.com
- Expensify
- PayPal
- Square
- Tsheets
- Many others

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PLATFORMS



INDUSTRIES

- General
- Not-for-profit
- Small to mid-sized businesses

PROS

- AICPA endorsed
- Better for rapidly growing businesses
- Cloud-based
- GAAP compliant (good for businesses that need more regulatory oversight and audit preparation)
- Personalized dashboards and reporting
- Tailored pricing

CONS

- Additional costs for integrations
- Pricier than QuickBooks
- Steep learning curve

WHAT DOES IT DO?

- Accounts payable
- Accounts receivable
- Cash management
- Collaboration between departments
- Digital board book
- General ledger
- Order management
- Planning and bookkeeping
- Purchasing
- Reporting and dashboards
- Revenue recognition

INTEGRATIONS

- ADP
- Bill.com
- Certify
- Salesforce
- SAP Concur

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PLATFORMS



INDUSTRIES

- General
- Education
- Manufacturing
- Not-for-profit
- Small to mid-size businesses

WHAT DOES IT DO?

- Billing
- ERP and accounting
- Financial management
- Governance, risk management and compliance
- Human capital management
- Order management
- Planning and budgeting
- Production management
- Procurement
- Revenue recognition
- Supply chain management
- Warehouse and fulfillment

PROS

- Cloud-based
- Custom tailored pricing
- Customizable interface
- Good for fast growing businesses
- Regular software updates

CONS

- Complex functionality
- Difficult to configure for specific roles
- Steep learning curve

INTEGRATIONS

- Third-party vendors & consultants

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PLATFORMS



INDUSTRIES

Real Estate /
Property Management

PROS

Customizable
In-person training
Live chat support
Mobile access
Quick and easy setup

CONS

Complex
Steep learning curve

WHAT DOES IT DO?

Alerts/notifications
Business management
Centralized database
Property management accounting
Workflow automation

INTEGRATIONS

Contact Yardi for integration information

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PLATFORMS



INDUSTRIES

Real estate:

- Affordable housing
- Commercial
- HOA/condo association
- Manufactured housing
- Mixed portfolio property managers
- Residential
- Self storage

PROS

- Intuitive navigation
- Online payment capability
- Tracking tenant receivables

CONS

- Clunky accounting features
- Complexity means it takes longer to learn how to use
- Unable to export data to Excel

WHAT DOES IT DO?

- Billing & invoicing
- Commercial property management
- Contact management
- Credit check
- Financial management
- Insurance management
- Late fee calculation
- Lease management
- Maintenance management
- Owner portal
- Payment processing
- Portfolio management
- Property database
- Rent tracking
- Tax management
- Tenant portal
- Tenant tracking
- Vacancy management
- Website management

INTEGRATIONS

- Contact Yardi for integration information

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PLATFORMS



INDUSTRIES

General

PROS

- Dashboard
- Easy setup
- Interactive quotes
- Online support
- Project tracking
- Syncs with bank accounts

CONS

Mobile app is lacking

WHAT DOES IT DO?

- Bank reconciliation
- Business accounting
- Expenses
- Invoices
- Project tracking
- Quotes

INTEGRATIONS

- AutoEntry
- Dext Prepare
- Gusto
- PayPal
- Practice Ignition
- Spotlight Reporting
- Stripe
- Square

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PLATFORMS



INDUSTRIES

General
Modules for transportation, logistics and manufacturing
Small to mid-size businesses

WHAT DOES IT DO?

ERP and accounting
Financial forecasting and reporting
Inventory management
Performance metrics
Project management
Supply chain management
Sales forecasting
Warehouse management

PROS

Customizable
Mobile app

CONS

Mobile app not as smooth as web version
Multiple tools and options can be confusing

INTEGRATIONS

ADP Workforce Now
DataBasics Time & Expense
DocuSign
Microsoft 365
Microsoft Dynamics TMS

Microsoft Word
PayPal
ZoomInfo
Many others

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PLATFORMS

ELITE™ 3E

INDUSTRIES

Legal

WHAT DOES IT DO?

- Accounts payable
- Client and matter management
- Collections
- Compliance and security management
- Conflicts
- Document management and assembly
- E-billing
- General ledger
- New business intake
- Price planning
- Purchasing
- Records
- Time tracking
- Workflow management

PROS

- Customizable
- Mobile app

CONS

- Not user friendly
- Slower speed / times out
- Steep learning curve

INTEGRATIONS

- eBillingHub
- Enterprise
- Westlaw Legal Calendaring Rules

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PLATFORMS



INDUSTRIES

Freight Brokerage

WHAT DOES IT DO?

- Billing
- Carrier portal
- Customer profiles
- Load board posting
- Truck load tracking

PROS

- Cloud-based
- Customizable
- Mobile app
- One-on-one training

CONS

- Buggy/frequent crashes

INTEGRATIONS

Google Services (maps, weather, traffic)

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PLATFORMS



INDUSTRIES

Printing

WHAT DOES IT DO?

- Accounts payable
- Accounts receivable
- Data collection
- Estimating
- Inventory
- Job costing
- Planning
- Purchasing
- Scheduling
- Shop floor
- Reporting and analysis

PROS

- Customizable
- Customer support
- One-on-one training
- User-friendly interface
- Web-based

CONS

- Integrations don't always work well together
- Weak customer service

INTEGRATIONS

- Printstream
- Process Shipper

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PLATFORMS



INDUSTRIES

- Agribusiness
- Manufacturing
- Real estate

WHAT DOES IT DO?

- Accounts payable
- Accounts receivable
- Asset management
- Contract and service billing
- Equipment cost analysis
- HR and payroll
- Homebuilder management
- Inventory, warehouse and transportation management
- Lease accounting
- Order management
- Resource assignments
- Real estate and rental management
- Supply management

PROS

- Easily customizable
- Easy to learn
- Multiplatform computing

CONS

- Harder to generate PDFs
- No built-in credit card processing

INTEGRATIONS

- Cleo
- Magic Software
- Onbase
- Oracle Cloud

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PLATFORMS



INDUSTRIES

Medium to large real estate companies
Student housing

PROS

Account ledger visibility
Allows residents to switch units or roommates easily
Delinquency reports

CONS

Report formatting makes printing difficult
Unable to text/message all tenants simultaneously
Weak customer service

WHAT DOES IT DO?

Analytics
Billing/invoicing
Business intelligence
Document storage
Maintenance management
Online payments
Payment processing
Real estate and property management
Resident portals
Revenue management
Spend management
Tenant tracking
Utility management
Websites

INTEGRATIONS

Brivo
Conversion Logix
Gatewise
MeetElise
Resident Boost
RiseBuildings
Spherexx
Zark Parking

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PLATFORMS



INDUSTRIES

General
Small business

WHAT DOES IT DO?

Accounts payable
Accounts receivable
Banking
Cash flow management
Invoicing
Inventory management
Job costing
Payroll
Reporting

PROS

Customer support
Marketing tools included
Speed and power

CONS

Costly to customize
Expensive

INTEGRATIONS

Microsoft Office 365
Others

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PLATFORMS



INDUSTRIES

General

PROS

Customizable
Multi-lingual
Open source code means you can access it for free

CONS

No direct customer support, only a user forum
Open source code means you have to be knowledgeable about the software
Steep learning curve

WHAT DOES IT DO?

Accounts payable
Accounts receivable
Billing/invoicing
Check printing
ERP and double-entry accounting system
Financial statements
General ledger
Inventory control
Payroll; time cards
POS
Reports
Vouchers

INTEGRATIONS

N/A

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PLATFORMS



INDUSTRIES

Legal

PROS

Cloud-based
Less costly

CONS

Steep learning curve
Costly implementation

WHAT DOES IT DO?

- Accounts payable
- Business intelligence
- Client and matter management
- Collections
- Compliance and security management
- Conflicts
- Document management and assembly
- E-billing; time tracking
- Financial management
- General ledger
- Mobile timekeeping
- New business intake
- Practice management
- Price planning
- Purchasing
- Records
- Workflow management

INTEGRATIONS

Contact SurePoint for integrations

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PLATFORMS



INDUSTRIES

Creative agencies

PROS

Ability to track freelancers
Cloud-based
Customizable

CONS

Complex interface
Complex to learn

WHAT DOES IT DO?

Custom dashboards and reporting
Digital proofing and revisions
Invoicing and billing
Project management
Resourcing and traffic management
Tasks, schedules and budgets
Time tracking and shared calendars

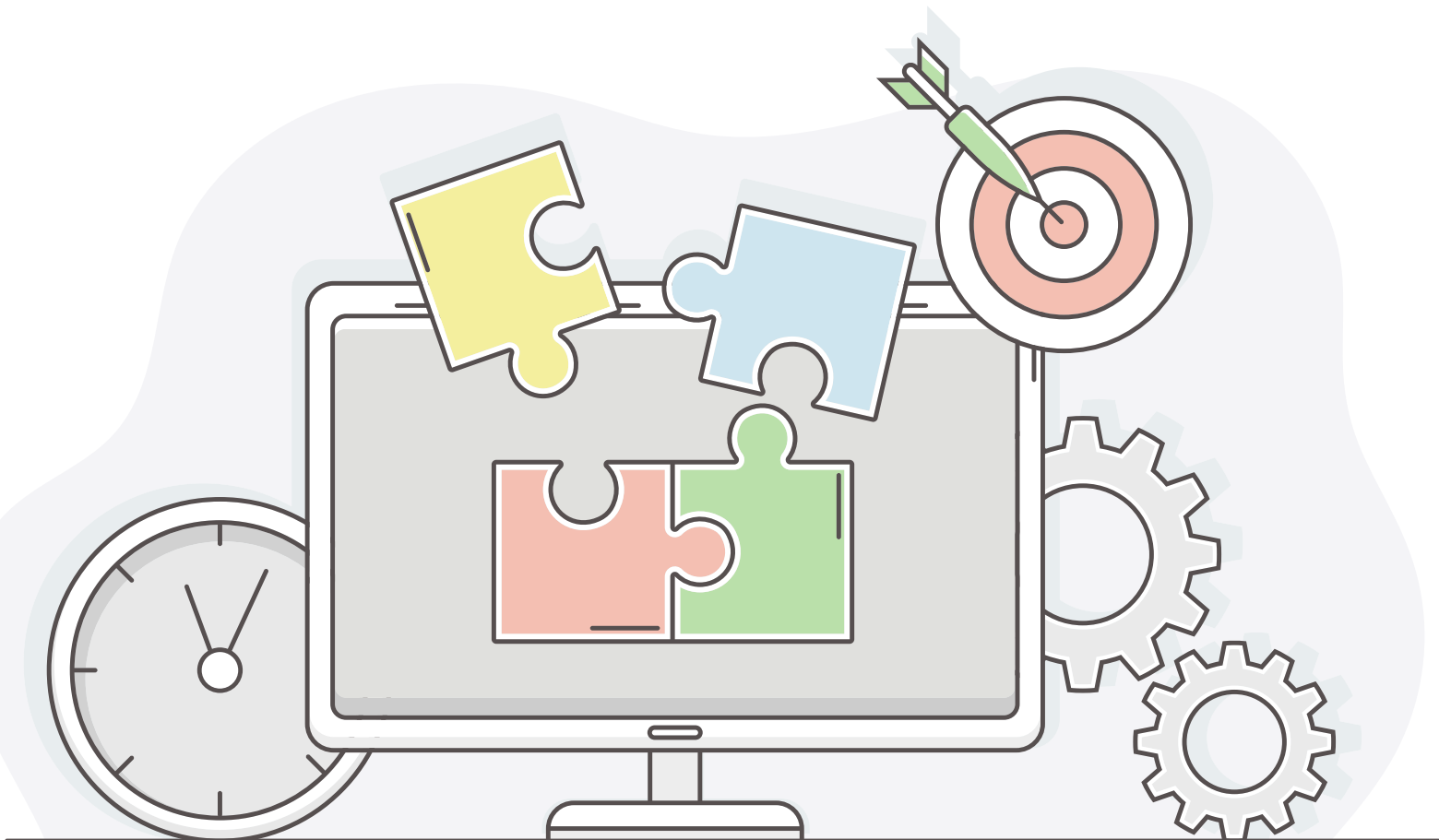
INTEGRATIONS

AmEx vPayment
Google Calendar
Microsoft Exchange 365
Plaid
Many other task-specific accounting and payment integrations

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INTEGRATIONS

SUPPLEMENT YOUR SOFTWARE



INTEGRATIONS



INDUSTRIES

Hospitality

PROS

Both mobile and fixed hardware

Custom features for different restaurant types

Easy menu building options

EMV technology available

Easy reporting access

Mobile data reporting features

CONS

No hardware flexibility -- can't bring your own system

No payment processing flexibility

Pricing isn't transparent

Setup can get complicated

WHAT DOES IT DO?

All-in-one restaurant point of sale and management system

Contactless delivery

Loyalty programs

Offline kitchen management

Online ordering

Reporting & analytics

Scheduling

Table service functionality

Update pricing & menu

INTEGRATES WITH

DoorDash

Eat Local

Epson

GrubHub

OpenTable

Postmates

Resy

Uber Eats

Yelp

Many others

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INTEGRATIONS



INDUSTRIES

General
Online retail
Retail and sales

PROS

Multi-state compliance
User-friendly interface

CONS

Extremely slow customer support
Expensive

WHAT DOES IT DO?

Applies tax rates and rules to invoices
File returns
Notifies when you've triggered nexus
Sales tax software
Validates addresses

INTEGRATES WITH

3rd party consultants and vendors ("partners")

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INTEGRATIONS



INDUSTRIES

General
Small to mid-size businesses

PROS

Automated AP/AR
Automatic bill entry
User-friendly interface

CONS

Not very customizable

WHAT DOES IT DO?

Accounts payable
Accounts receivable

INTEGRATES WITH

FreshBooks
Microsoft
Oracle NetSuite
QuickBooks
Sage Intacct
SAP
Xero
Yardi

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INTEGRATIONS



INDUSTRIES

Construction

PROS

Ease of use
Job tracking
Owner login to view progress
Proposals
Unlimited users/unlimited jobs
Vendor payment processing

CONS

No unpaid trial; first 30 days free if you provide credit card

WHAT DOES IT DO?

Accounts for trade partners
Bid requests
Budgeting
Change orders
Daily logs
Documents & photo storage
Email marketing
Estimates and proposals
Invoicing
Integrations
Leads/CRM
Lien waivers
Payment processing
Plan markup
Purchase orders
Scheduling
To-do's
Time clock
Warranty

INTEGRATES WITH

QuickBooks
Xero

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INTEGRATIONS



INDUSTRIES

General

PROS

Automated features like reimbursements

Intuitive interface

CONS

Steep learning curve

WHAT DOES IT DO?

Bill pay

Expense management

Invoices

Travel

INTEGRATES WITH

Bill.com

Financial Force

Greenhouse

Gusto

Kayak

Lyft

Microsoft Dynamics 365

Oracle NetSuite

QuickBooks

Sage Intacct

Thomson Reuters

Uber

Wolters Kluwer

Xero

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INTEGRATIONS



INDUSTRIES

General

PROS

Customizable
Data visualization
User-friendly interface

CONS

Complexity of the software can be a little confusing to new users

WHAT DOES IT DO?

Alert dashboards
Benchmarking
Budgets
Business analytics
Business forecasting
Customized reports
Financial statements
KPIs
Multi-currency consolidation

INTEGRATES WITH

Excel
MYOB
QuickBooks
Xero

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INTEGRATIONS

FIXED ASSETS CS

INDUSTRIES

General

PROS

Broad functionality
Customizable reports

CONS

Not very user friendly
Steep learning curve

WHAT DOES IT DO?

Fixed asset management and reporting

INTEGRATES WITH

Other Thomson Reuters products

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INTEGRATIONS



INDUSTRIES

General
Legal

PROS

Cloud-based
Secure

CONS

Not very user-friendly

WHAT DOES IT DO?

Data loss prevention
Document bundle
Document management
Email management
Encryption keys
File sync
Instant messaging

INTEGRATES WITH

Adobe
Microsoft

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INTEGRATIONS



INDUSTRIES

General

PROS

More secure file sharing than regular email

User-friendly interface

CONS

Not as well-known as competitors like DropBox, making clients less likely to click on a link that you send to them

WHAT DOES IT DO?

Client portal

Content collaboration

Document management

Document sharing

E-signature

File sharing

File sync

Workflow management

INTEGRATES WITH

Fujitsu ScanSnap

Google

Microsoft

Zapier

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INTEGRATIONS



INDUSTRIES

Hospitality

PROS

24/7 support
Accepts credit cards
All-in-one restaurant management
Ease of use
EMV-compliant

CONS

Add-ons such as restaurant tech integration, digital ordering and the payroll management cost extra, making Toast less cost effective for small restaurants

WHAT DOES IT DO?

Contactless delivery
e-Gift cards
Email marketing
Inventory management
Online ordering
Online pay
Restaurant point of sale and management system
Scheduling

INTEGRATES WITH

AP Intego
CIRRUS
Davo
DoorDash
Popmenu
RASI
Raydiant
Resy
SERVPRO
Sling
Staples Connect
Vestwell
xtraCHEF

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INTEGRATIONS

Track 1099™

INDUSTRIES

General

PROS

Bulk returns
Customer support

CONS

Price

WHAT DOES IT DO?

E-delivery
Federal and state e-filing
Track your tax status

INTEGRATES WITH

Bill.com
Oracle NetSuite
QBO
Xero

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INTEGRATIONS



ULTRATAX SOFTWARE

INDUSTRIES

Accounting

PROS

User-friendly interface

CONS

Poor customer service
Software can be slow

WHAT DOES IT DO?

Business personal property tax returns
Tax prep

INTEGRATES WITH

Other Thomson Reuters software

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KEEPING AN EYE TOWARDS INTERNAL CONTROLS

At its core, financial management of a company or not-for-profit organization is about accountability and mitigating risk. The systems and processes you put in place to track income, expenses, payroll, bank reconciliations and financial reporting need to ensure accuracy and transparency. Above all, they need to be governed by a system of strong internal controls.

Internal controls refers to the practices that protect the integrity and accuracy of your financial reporting. When we talk about internal controls, many people immediately think of fraud prevention which is an important goal of a good internal controls plan. For example, making sure that the same person doesn't open the mail, enter payments, record expenses, sign checks and make bank deposits limits fraud, ensures appropriate segregation of duties and is a key feature of a good internal controls system.

It's essential to discuss with your outsourced provider how the internal controls structure of their organization will mirror – or strengthen – yours.

Some key questions to ask as you enter an outsourced relationship include:

Segregation of duties – How will the outsourced provider interact with your staff and ensure that all transactions are recorded accurately? How many staff members from the provider will be involved with your account and what will their roles be? How often will the provider give you reports and what information will be contained in them? What are the internal controls practices of the outsourced provider? Do they have a SOC report that attests to their internal control environment as it relates to the services provided?

System access – Who from the provider's staff will have access to your documents, computer files, applications and platform accounts? Will your staff be able to review the provider's work in real time? Will the provider have another person reviewing the work?

Accountability – What are the provider's policies and guarantees regarding accountability in the event of a major mistake?

Asking the tough questions up front as you embark on a relationship with an outsourced accounting provider can help ease your mind about internal controls.

Read more on [internal controls best practices and how to prevent fraud](#).

GLOSSARY OF TERMS

Add-On

An add-on (sometimes called an extension) is a third-party software program or script that is added to a program to provide additional features and capabilities.

Fraud

Criminal deception intended to result in financial or personal gain. In business, financial fraud can occur when an organization has weak internal controls, enabling individuals to have too much control over incoming payments, expense records and other touchpoints that provide opportunity for theft.

Integration

In the technology world, integration refers to the combination of software parts into one system. A software program that is developed to accomplish a single objective – say, track employee hours – may be bundled with a larger business accounting platform, creating an integration.

Internal Controls

In accounting, internal controls refers to the set of policies and procedures an organization uses to ensure reliable financial reporting and compliance with laws and regulations. The ultimate goal of internal controls is to minimize risk and prevent internal fraud.

Outsourced Accounting

Many businesses and not-for-profit organizations are engaging accounting firms to perform the monthly accounting, bookkeeping and payroll functions that internal staff previously completed. Outsourced accounting is a growing trend due to the growth in cloud-based technology that enables off-site accounting functions.

Partial Outsourcing

Partial outsourcing occurs when an organization engages an accounting firm to perform some of the monthly accounting and financial management functions, but keeps others in-house.

Platform

In technology, a software platform generally is a broad-based multi-functional program, often cloud-based, that provides users with a suite of capabilities. Platforms often integrate with other software programs that perform specific functions that complement those that were designed into the platform (see *Integration*).

Tech Stack

A tech stack is the configuration of technology solutions, platforms and integrations that an organization or outsourced provider uses to manage accounting and finance functions. The ideal tech stack for one company may be different from that of other companies. One of the advantages of engaging an outsourced accounting provider is that they will evaluate your organization's needs and design the right tech stack.



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Windham Brannon is a recognized leader in providing assurance, tax, and advisory services to clients both nationally and globally. Our mission is to create exceptional outcomes for our clients and our people, offering more than just technical insight you would expect – we offer more proactivity, more attention and more investment into goals and priorities. Our best-in-class professionals are responsive and diligent as your trusted advisors, getting ahead of your needs so you can be well-positioned within the marketplace.

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