



SKY BOOKS

YOUR BUSINESS IN
THE CLOUD

**A BUSINESS
OWNER'S GUIDE TO
THE CLOUD**

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INTRODUCTION

Cloud computing technology offers a suite of time-saving benefits for small business owners. As cloud services run on the internet (not on your local computer), they enable you to work seamlessly across a range of devices. You no longer need to worry about transferring files between your laptop and computer, or manually backing up all of your data – everything will be saved ‘in the cloud’.

Making the transition to cloud-based services may feel daunting at first, especially if you’re not familiar with this technology. However, it’s definitely worth the effort; the efficiencies gained will minimise the time you spend on administration and free up hours for you to focus on your wider business goals.

Written for everyone, this ebook takes you through some of the best cloud-based apps for small and medium businesses, as well as some tips for effective cloud storage and security.



OUR TOP 5 TIME-SAVING CLOUD-BASED APPS



1. Cloud accounting software

With cloud accounting software, all your financial data will be at your fingertips. You can log receipts, send invoices, pay bills and monitor cash flow in real time, from any computer or device. Bank feeds automatically import your bank transactions into your accounting software every day, allowing transactions to be reconciled with ease. You can even upload receipts as you get them; simply take a photo of the receipt, upload it to your accounting software and reconcile it with the corresponding transaction. This keeps your wallet clutter-free, and you don't have to worry about receipts fading and becoming illegible. They will all be stored safely on the cloud for future reference.

Another great advantage to keeping your books in the cloud is that your accountant, bookkeeper, business coach and other key players can all access the data in real time. If your business coach or accountant is helping you reach a financial goal, they can log into the software to keep tabs on your progress. Using cloud-based accounting software is essential for any business owner seeking real control and visibility over their numbers.

Suggested apps:

[*Xero*](#) [*Receipt Bank*](#)

2. Gmail



An effective and streamlined email system is absolutely essential for any successful business owner. You may be thinking: "I could never switch from Outlook – my whole life is in there!" That's exactly what I said before I converted to browser-based Gmail. But since making the switch, I've never looked back – I save so much time compared to when I used local-based Outlook or Mac Mail.

The real advantage of Gmail is the availability of shortcuts and hot keys. These shortcuts allow you to do everything 5 times faster. There's a huge range of optional add-ons and plug-ins (most are free)



that connect directly into Gmail, including features such as delayed sending, auto follow-ups, tracking, and much more.

Three ways Gmail can save you time

• Search

Google is the undisputed king of search and Gmail is no different. Type anything into the Gmail search bar and it will find any email that relates to that text. Outlook has this feature as well but, in my experience, it frequently breaks down due to “indexing”. With Gmail you find any email, anytime, at the click of a button.

• Labels

The label function is Gmail's filing system. Labels allow you to tag emails with multiple categories, making it much easier to find and group similar emails and threads without doubling up on storage. Simply add relevant labels/tags to an email, then use these tags to search for it later.

• Filters

Similar to rules, filters allow you to apply an action to an email before it arrives in your inbox, such as forwarding, labelling or filing. So when a supplier emails you an invoice or credit, you can auto-forward it to your paperless invoice/receipt management tool (we recommend Receipt Bank). Or, if you subscribe to blogs and newsletters but wish to avoid distractions while at work, you can set up a filter that looks for the word 'unsubscribe'. Before the email hits your inbox, you can tell Gmail to mark it as 'read' and file in a folder called 'blogs and newsletters' – ready for you to browse in your own time.

Using Gmail effectively can help you achieve the elusive 'inbox zero' that everyone dreams about. There's something about the goal of inbox zero (or having fewer than 10 emails to action) that gives you more productivity. You're also less likely to let anything slip through the cracks.

Google Apps for Work is a platform that integrates your email, contacts and a web-based calendar. It's very easy to use and has everything (and more) that your local Outlook calendar has, plus you never have to worry about syncing issues.

Suggested apps:

[Followup.cc](https://followup.cc) (*best choice*)

[Boomerang](#)



3. Online documents

Cloud-based documents such as spreadsheets, word documents and slideshows can help you to be more efficient. When you store documents in the cloud, you have the ability to open, view or edit files from multiple devices. You can even have several people viewing or editing files at the same time.

You might choose to have some other cloud-based softwares export directly into your documents, such as a database export to a Google Sheet (spreadsheet). This means you can enjoy all the functionality of modifying the data without worrying about updates, compatibility issues or which device you're working on.

Another great benefit of online documents is never having to worry about saving. Every time you make a change, it automatically saves. History is also saved, so you can easily refer to previous versions.

Suggested apps:

[Google Apps \(best choice\)](#) [Microsoft Office Online](#) [iCloud Apps](#)



4. Cloud storage

Cloud storage is a key tool for anyone looking to be more efficient. Having all your files at your fingertips is essential from both a backup and redundancy point of view. With cloud storage you can sync all your files to the cloud – and make sure data is up-to-date across all of your devices in real time. If you make a change to one file, it updates all other files straight away. This means you can start something in the office, make a few changes on your phone while on the train, then finish it off on your home computer. Most of the time, previous file versions will be stored automatically, although you should always have a dedicated backup system in place – just to be sure.

Suggested apps:

[Google Drive \(best choice\)](#) [Dropbox](#) [iCloud Drive](#)



5. Google Chrome (more than a web browser)

The humble internet browser used to be mostly for surfing the web, but now it is so much more. You can do almost everything you need using a browser, including email, online docs and file storage. So what makes Google Chrome stand apart from its competitors?

Chrome offers a suite of extensions that will make your life easier. There's an infinite number of extensions for the browser; everything from plugins to Evernote, to password vaults like Lastpass and screen capture tools. There are also tools which allow you to block certain websites for a period of time; perfect if you want to make sure you don't get distracted by Facebook when you need to be working.

Another advantage of 'working in the browser' is you don't need to worry about time-wasting manual updates or compatibility issues – everything is always up-to-date and ready to use. For those who want to take this efficiency to the next level, you can trade in your Mac or PC and get a Chrome Book. This is a super-fast computer with limited storage, loaded with a Chrome Operating System.

Suggested apps:

[Google Chrome \(best choice\)](#) [Mozilla Firefox](#)

Suggested extensions:

[Evernote](#) [LastPass](#) [Full Page Screen Capture](#) [RescueTime](#)



THREE WAYS TO GET THE MOST OUT OF YOUR APPS

Now that you have a better understanding of the types of cloud-based apps available, here are some tips to help you use them to your best advantage.



1. Security

When using cloud services it's important to have adequate security systems in place. Use complex passwords that include a range of characters and don't include things like your name or birthday – this will go a long way to keeping the hackers out.

An extra level of security that most cloud-based services now offer is '2-step Verification'. This is done by downloading an app on your mobile device (e.g. Google Authenticator - www.google.com/2step) and linking it to your user account. This will prompt you after you've put in your password to enter a unique code from the app, which changes every 30 seconds. This means that for a hacker to 'get in the front door', they would need your password as well as your phone; making it much harder to gain access.

2-step Verification is supported on many apps, including Xero, Dropbox, Google Apps, Gmail, Last Pass and many more. Ensuring robust security means you can take advantage of all the great products and services in the cloud without worrying about your data being vulnerable.



2. Automation

One of the big advantages to cloud-based software is being able to automate processes. This means setting up things to (wholly or partly) happen by themselves. To achieve this, your programs and software need to talk to each other. API or 'Application Programming Interface' is a fancy name for the ability of your apps to talk to each other and sync information, further reducing double handling and potential errors.



A lot of cloud-based systems have direct API links (e.g. Receipt Bank to Xero). There are also many third-party providers that 'sit in the middle' if both programs have an API but aren't directly linked together. Get your apps talking to each other to ramp up your productivity.

Suggested apps:

[Zapier](#) [IFTTT](#) [CloudHQ](#)



3. Outsourcing

One of the best ways to take advantage of cloud based systems and becoming more efficient, is to outsource some of your tasks. Having everything in the cloud means you can collaborate much easier with likeminded professionals. Whether that's hiring an IT specialist or engaging a bookkeeper, outsourcing leaves you with more time to do what you do best – saving you money and increasing your productivity. Outsourcing is a great way to streamline tasks that you need to get done without letting other areas of work suffer.

SUMMARY

Whether you're a seasoned cloud user or a beginner, there's so much that cloud-based solutions can offer. New tools and apps are constantly being invented to increase your productivity. Being a student of efficiency will go a long way to helping you do the best with the time you have available, so you can enjoy the things you want to do.

Happy Clouding!

Written by Dave Gorter, Managing Director of Sky Books.

Sky Books is a bookkeeping firm that specialises in paperless cloud based systems. They are passionate about efficiency and love helping people save time and be more effective. If you would like any help exploring anything that was mentioned or need help getting set up, get in touch and let us show you how to get Your Business in the Cloud.

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