

Topdocs integration with Xero Practice Manager

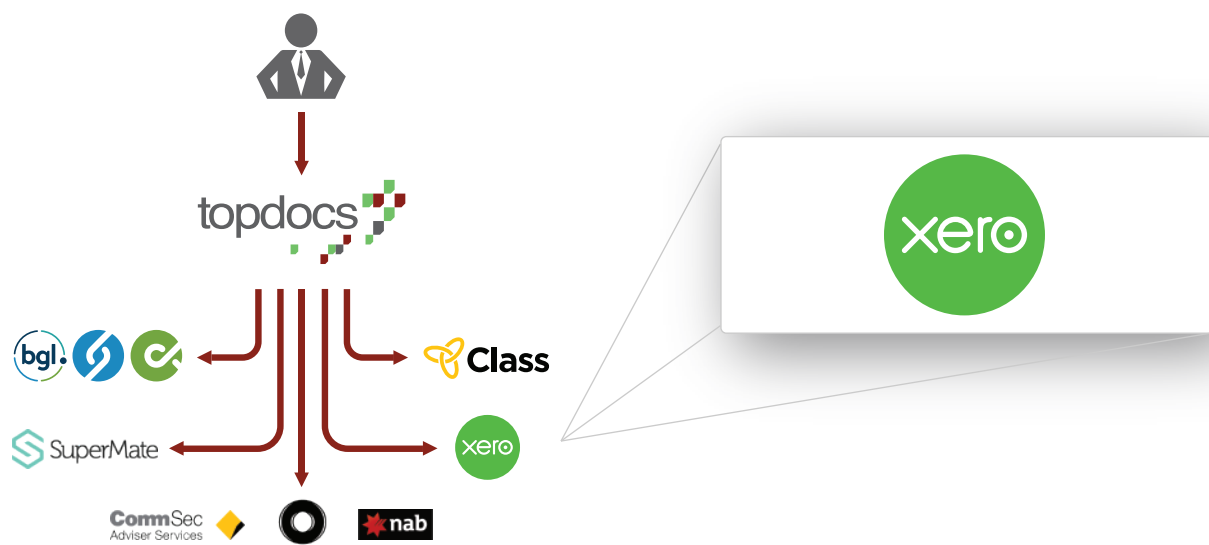
Our extensive integrations with Xero Practice Manager (XPM) enable you to:

- > Have your new SMSFs, Companies and Trusts instantly set up in your XPM account, including all relevant relationships
- > Populate your Topdocs application forms with your XPM client data

For further information or to request a demonstration, please contact our team on 1300 TOPDOCS or support@topdocs.com.au.

USE THIS INTEGRATION WITH

- > Company Registrations
- > Company Name Change
- > Company Constitution Update
- > Family Trust Establishments
- > Unit Trust Establishments
- > Changes of Trustee
- > Trust Vestings
- > SMSF Establishments
- > SMSF Changes of Trustee
- > SMSF Deed Update
- > SMSF Income Streams
- > SMSF Bare Trust
(bank or related party lender)



KEY FEATURES OF THE INTEGRATION



INSTANTLY SET UP YOUR NEW STRUCTURES IN XPM

Order a new company, trust or SMSF with us online and you will have the option to have the new structure instantly set up in your XPM account without the need to key any additional client data. As part of the structure set up, we will create all relevant relationships in XPM for you.



POPULATE YOUR SMSF, COMPANY & TRUST DOCUMENT ORDER FORMS

When you place your orders with us, you will see a XPM button next to all contact fields. Click the button to import the details of a client from XPM and we'll populate your Topdocs application form with their name, address and date of birth.