



# Class & Cloudfis: SMSF Sorted

July 2022

We will reimagine a more simple, automated world  
for our customers and they will love it!

Simplify. Automate. Connect.





## Matthew Bambrick

### Senior Account Manager, Class

An Experienced Senior Account Manager at Class, Matthew Bambrick has a demonstrated history of working in the SaaS industry. Matt is a strong accounting professional, qualified with a Commerce Accounting degree from Macquarie University.



## Clint Estavilla

### Head of Sales, Cloudfis

An experienced Head of Sales at Cloudfis Clint Estavilla has a demonstrated history of working in the accounting industry. A strong sales professional, Clint's qualifications include a Master of Commerce focused in Strategy & Innovation from University of Sydney.

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## Agenda

1. Class Overview
2. Cloudfis feature update
3. Benefits and features of Cloudfis Sorted Lite & Pro
4. Detailed Demonstration of Cloudfis Sorted
5. Promotional offer
6. Q&A

# Class Simplifying the Complex with Automation

Launched in 2009, Class was the first cloud SMSF software to hit the market



## Class Super

Simplify the administration of SMSFs through automation & connectivity

[Learn More](#)



## Class Portfolio

Investment management & reporting for non SMSF portfolios

[Learn More](#)



## Class Trust

Standardise and automate trust accounting and administration with our latest new product.

[Learn More](#)



## NowInfinity

A suite of integrated solutions to simplify the management of entities and registers

[Learn More](#)



## Benefits & Features - Lite

Reimagine workpapers and end-of-year preparation process



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### Reduce up to 80% of document handling

- Upload documents for bookmarking
- Run OCR to search, tag and reference



### Remove entire collation and correction steps

- Auto-compile Class financials and documents
- Generate and re-work PDF files in a single click



### Prevent repetitive work with automated referencing

- Automatically hyperlink documents to accounts
- Simply search OCR documents for closing balance



### Organise external workflow and document sign-off

- Seamlessly transfer to auditors with Cloudoffis
- Use dashboard for Cloudoffis auditor queries and docusign

## Time Savings - Lite

### Document Organising and Referencing

#### Traditional Processes

- File individual or combined PDFs to drive or DMS (build out folders manually)
- Prepare/import lead schedules and summaries in Excel or Print Class TB to use as lead schedule.
- Reference accounts or trial balance to source documents. May be physically referencing paper files or digitally building hyperlinks.
- Update/re-start references and workpapers as data changes.

**Average Time: 2-3 Hrs**

**3 times as fast**

#### SMSF Sorted

- Upload individual or a single unsorted PDF (Not in a particular order).
- Optical Character Recognition (OCR) software is run over all required documents in minutes to create readable and searchable data.
- Either open and bookmark docs, linking to accounts or simply Search closing balance, quantity or account name.
- An account level document Hyperlink is presented to Class user.
- Data live/refreshed in Class to prevent re-works

**Average Time: 45 Mins**



## Time Savings - Lite

### Collating Workpapers and Sending to Auditor

#### Traditional Processes

- Print, compile and re scan Workpaper pack, or
- Using PDF software, combine files and build links
- Upload files to auditor portal or their DMS of choices
- Send Via Email

**Average Time: 30 Mins**

**Reduce 93% of processing time**



#### SMSF Sorted

##### Cloudoffis Auditor

- 1 Click transfer audit job ( All data and docs from Class will be sent as an audit job to you Cloudoffis auditors portal)

##### Non Cloudoffis Auditor

- 1 Click generate PDF Workpaper pack including financials and Class Reports and hyperlinked Source docs, send or upload to auditor

**Average Time: 2 Mins**

## Benefits & Features - Pro

Reimagine workpapers and end-of-year preparation process



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### AI engine for next-gen accounting

- Intelligent, next generation document recognition and processing
- Automated compliance, review and referencing of key documents
- Automated wrap statement reconciliation



### Portal for workflow, management & review

- Workflow and job management dashboards with staff logins & assignments
- Improved management review with one-click notation for approvals and reworks
- Communication management for internal and external queries and reviews



### Automation & optimisation

- 8 x automated 'Excel-like' workpapers for easily customised reconciliation checks
- 21 observations standardise compliance checks with automated red flags
- Automated push notifications and query alerts move jobs through workflow



### Additional DMS features

- Additional file storage capacity for complete coverage
- Mirrored datasets in Class and Sorted for optional entry points



## Demonstration

# Let's get you sorted

Reimagine your end-of-financial-year preparation process with our new Workpapers solution



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## Sorted Pro Free until December



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- Use Sorted Pro completely free until December 15th 2022 (Month to Month after that)
- Complete onboarding assistance and unlimited training and support.
- Sync with Sorted Lite in Class (Sync docs back to Class and not lose work even if you cancel)

Offer Ends 30 August 2022, Let me know when we can get you set up.

Email your interest to: [Clint@cloudoffis.com.au](mailto:Clint@cloudoffis.com.au)

## Sorted Pro Free until December



- 1 - If on no software offer Lite or Pro Trial
- 2 - if on Lite offer Pro Trial
- Use Sorted Pro completely free until December 15th 2022 (Month to Month after that)
- Complete onboarding assistance and unlimited training and support.
- Sync with Sorted Lite in Class (Sync docs back to Class and not lose work even if you cancel)

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## Questions and Answers

# Contact Our Team

### Class

[accountmanagement@class.com.au](mailto:accountmanagement@class.com.au)

### Cloudfis

[clint@cloudfis.com.au](mailto:clint@cloudfis.com.au)



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