



splose's EOFY survival guide

Who said EOFY had to be tough?

Finish the financial year on a high note, and set yourself up for success.

splose

I love the extra workload at the end of financial year.

—Said no-one ever.

It's no secret, it's a time most of us dread. But at splose, we don't think it has to be anymore. We're here to help you stay on top of your finances all year round. And with this ultra-handy checklist as your guide, you'll be sure to make a smooth finish. Whether you're a solo practitioner, or managing a growing team, we've got your back.

We've kept it short and sweet, just the essentials you need to tidy up your splose account, clean your data, and get ready for a fresh start.

Tick things off, and make EOFY one less thing to stress about.

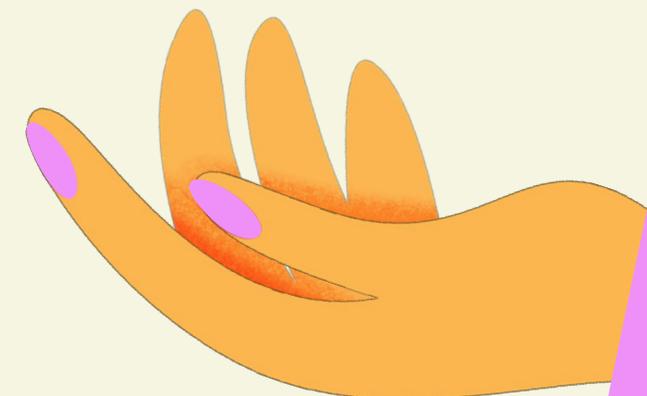
Tick off your EOFY to-do list

1 Lock in your billing

- Make sure all draft invoices have been sent
- If using accrual-based accounting, it's a great opportunity to run all uninvoiced items utilising batch invoicing on the evening of 30 June to ensure all sessions completed reflect in your financials. Another option is to run an unbilled items export as at 30 June and send to your accountant to journal
- Review and follow up on any overdue payments - let your debtors know you'd like to have everything settled by EOFY
- Ensure all items in accounting systems are reconciled

2 Clean up your contacts

- Merge duplicate records and archive old contacts
- Ensure client and referrer details are up to date



3 Review notes and documentation

- Finalise any drafts and complete outstanding progress reports
- Utilise the progress note, appointments and support activities reports to identify incomplete notes or where no notes have been completed

Stay on top of compliance obligations:

- Check that driver's licences on file are current
- Confirm police checks, worker screenings, and Working With Children Checks are up to date
- Update team members' professional development (PD) diaries

4 Check your integrations

- If you use Xero, review your integration to ensure everything is up to date
- Address any sync errors promptly

5 Download your reports

- Gather everything your accountant will need
- Export revenue, appointments, and service reports if required

6 Review your rates & fees

- If things have gotten a little more costly, perhaps it's time to update your hourly rates and appointment fees. Make sure you're charging what's right for you and your clients
- Update all services with your new fee schedules. (This can be done via Settings → Services → Edit)
- Send updated fee schedules to relevant third parties
- Communicate any changes with current clients

Handy reports for EOFY

With these ultra-insightful reports at your fingertips, you're about to be your accountant's favourite.

Here's a glimpse at what you've got ready to roll in a click:

- Revenue report**
View income by team member, service, or location
- Uninvoiced appointments**
Make sure no billable work slips through the cracks
- Appointments report**
Review service delivery, cancellations, and no-shows
- Debtor report**
Get a clear picture of outstanding debts and help your accountant assess whether any should be written off

Xero & splose are your dream team at this time of year

splose works hand in hand with Xero, and it's a match made in heaven all-year long. But EOFY is when it truly shines. This two-way integration keeps your invoices and payments in sync, reducing errors, saving hours of double-handling admin, and making life easier for you, and your accountant or bookkeeper.



xero

Get ahead with 10% off annual billing

EOFY is the perfect time to review your subscriptions.

Switch to annual billing and enjoy 10% off – a simple way to save money, stay compliant, and bring forward your business tax deduction, all while staying efficient year-round.

*T's and C's apply.
splose.com/terms-of-service



For EOFY and beyond, splose has your back!

For more tips and tricks, check out our [resource centre](#).

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