Why Xagle Works

Detailed Feature Outline

Bookkeeping that handles more than just invoices

- Create quotes, estimates, and invoices with branded templates.
- Accept payments online and track income and expenses in real time.
- Automate recurring invoices, subscriptions, and tax calculations.
- Track financial activity across clients, jobs, or departments.
- Centralize payment history and financial communications.

CRM designed for stronger client relationships

- Client profiles with full timelines, notes, attachments, and linked tasks.
- Built-in email integration for communication tracking.
- Share files, updates, and tasks through client portals.
- Tag, sort, and segment clients for marketing or workflow needs.

Tracking tools that go beyond basic reports

- Dashboards display real-time performance and progress across departments.
- Track KPIs, profitability, and task statuses with visual insights.
- Log time by client, job, or team member to evaluate resource use.
- Export data for accounting, payroll, or internal review.

Built to scale with your business

- Suitable for solo operations or growing teams with layered permissions.
- Add or remove features based on your current workflow needs.
- Customize workflows as business models evolve.
- Onboard new team members with minimal training thanks to intuitive design.

Custom to match your brand & flow

- Adjust templates, data fields, and views to reflect your identity.
- Personalize quotes, invoices, portals, and communication touchpoints.
- Optional fields and process flexibility for niche industries or workflows.

UX-centric: A clean, user-friendly experience

- Interface prioritizes clarity and simplicity without losing depth.
- Drag-and-drop features, collapsible menus, and inline editing reduce clicks.
- Designed for business owners who want power without complexity.
- Mobile-friendly and responsive for working on-the-go.

MOBILE ACCESS

TIME TRACKING

TAX PREP REPORTS

CUSTOM TEMPLATES

AUTO PAYMENT REMINDERS

CLIENT PORTAL