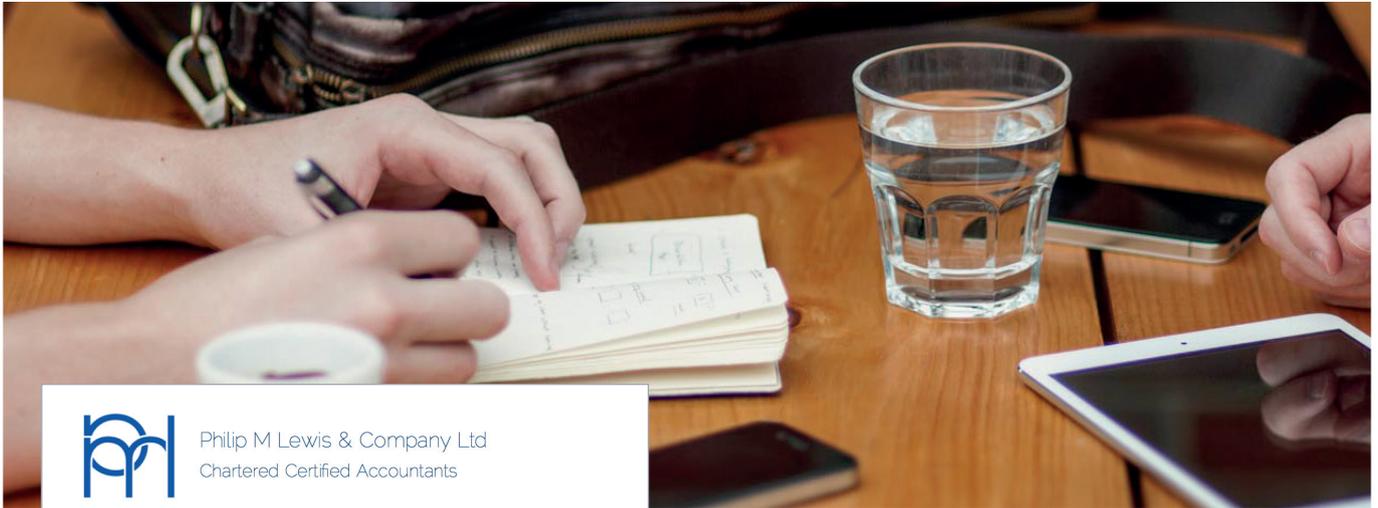


PML Accountants streamline client collaboration with IRIS online solutions



Philip M Lewis & Company Ltd
Chartered Certified Accountants

CUSTOMER PROFILE

PML Accountants in Port Talbot, West Glamorgan, work with clients in a range of industries. There is no typical PML client, as the firm's client base ranges from sole traders and subcontractors to large manufacturing companies.

BUSINESS CHALLENGE

To apply new time-saving technology to clients' bookkeeping processes and to accelerate communications with them.

SOLUTIONS USED

KashFlow
IRIS OpenSpace
IRIS Accountancy Suite

PML Accountants are long-time users of IRIS software. One of the first decisions that Managing Partner Phil Lewis made in opening for business in 1996 was to implement products from the IRIS suite.

Over time, he has expanded the number of modules in use beyond the core IRIS accounts and tax software to include practice management, company secretarial and time & fees. Phil comments, "I've been in practice for two decades now and am still using IRIS software. It does everything apart from making the tea!"

An innovative approach

More recently, the firm has begun using IRIS OpenSpace as a secure way to collaborate with clients and exchange confidential information with them online. Phil says, "We're keen to work with clients across all industries who share our approach to using new technology to increase efficiency."



Compliance covered

Using the IRIS Accountancy Suite has ensured clients' compliance with statutory requirements for 20 years



Collaboration

The PML team and clients have shared online access to business records, giving real-time insight into the client's business



Connect with your clients

More and more PML clients are ready adopters of today's technology, such as secure document exchange and approval through IRIS OpenSpace



Time-saving

Rapid client set-up - within just 15 minutes, the client can be using the KashFlow online accounting software to process their administration



Security

Documents are exchanged via a secure portal, avoiding the risks associated with post and email



Paperless

Paper-based processes within the firm are minimised through the use of online solutions (IRIS OpenSpace, IRIS OpenPayslips and KashFlow)

At an exhibition for accountants, Phil encountered a tool from Receipt Bank that converts key information from bills, receipts and invoices into data. This was the driver for implementing KashFlow online accounting software from IRIS, as the two solutions are compatible and complementary.

Phil says, "Not long after adopting these two solutions, I visited a brand new client who had taken over a pub-restaurant down on the Gower Peninsula. She bought straight into the idea of KashFlow and became our willing guinea pig. All she does is link the bank statements up to KashFlow, so we can pull the data in, and load her invoices into Receipt Bank. We take it from there and deal with all the rest."

In fact, the response from PML clients in general to KashFlow has been very positive: "We offer different options, with a series of bundled services and now have approaching twenty clients, a mix of new and long-standing, using KashFlow. Clients find it simple to use and really like the bank integration while, for our part, we can look over their shoulder to give them a gentle nudge if necessary."

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Phil feels KashFlow is head and shoulders above similar solutions: "We find KashFlow very much more than a bookkeeping package and it's much better than competitive solutions we come across. It's simple to use and it's easy to set clients up, get their logos on there and have them creating invoices – all within a single 15-minute session."

The future is online

Phil and his team are on a mission to consign paper-based communications to the waste-paper basket of history, and solutions such as IRIS OpenSpace and KashFlow are aiding this transition.

Phil says, "Clients use IRIS OpenSpace to approve documents such as letters of engagement, accounts and tax returns. We have moved over to IRIS OpenPayslips, which lets us publish payslips and P60s electronically from within the IRIS payroll software to a secure online portal. Once again, we obtain all the approvals through IRIS OpenSpace."

He sums up, "We're getting more and more buy-in from clients to the idea of collaborating online. It's faster, more efficient and definitely the way forward."

