


Preparing for MTD and optimising operations at Thompson Taraz Rand



Customer Story



A woman with dark hair, wearing a white top, is gesturing with her right hand while speaking to a man. The man, seen from the side, has dark curly hair and is wearing a blue shirt. They are in an office environment with large windows in the background. A blue diagonal overlay covers the left side of the image, containing text.

Thompson Taraz Rand is a regional firm of chartered accountants, tax advisers, and registered auditors based in central Cambridge. Founded in 2001 as “Stanes Rand,” the practice focuses on offering expert business advice, responding quickly to client needs, and minimising tax liabilities. To enhance efficiency and stay on top of everything, the firm uses a wide range of IRIS Accountancy Suite modules, including IRIS Accounts Production, Business Tax, Personal Tax, Practice Management, Company Secretarial, Time and Fees, and OpenSpace.

Highlights

- Staying organised and up-to-date with Accountancy Suite
- Smooth transition from a paper-based system to digital
- Efficiently preparing for MTD with seamless tax filing and client management



Remote work in Italy and seamless workflow with IRIS

Angelina Upchurch, an AAT qualified accountant at Thompson Taraz Rand, has been a dedicated user of IRIS throughout her career, ***“I’ve always used IRIS from day one within my working life in accounting... I was very lucky that when I started, the owner of the company always emphasised that it was very important to be able to use IRIS software properly, especially Practice Management, because it gives you all the information you need to maintain an up-to-date workflow and stay organised.”***



Angelina Upchurch,
AAT Qualified Accountant

For Angelina, IRIS Practice Management is more than just a tool – it’s essential to her workflow. ***“I always call IRIS Practice Management the Bible because everything stems from there. If you use it correctly, you’re not going to miss any deadlines, and the client is going to be looked after.”*** Over the years, she has continuously sought to maximise the potential of IRIS, keeping up with new features and updates shared through training and webinars by the IRIS team. ***“We were always told to use it correctly and to try and maximise its potential. We’re trying to use all the information and new tricks shared by the IRIS team during the training and webinars,”*** says the accountant.



A person in a business suit is working at a desk. Their right hand is on a calculator, and their left hand is holding a pen over a notepad. The desk is cluttered with papers and a binder. The background is slightly blurred, showing a modern office environment.

IRIS Hosting, which the practice previously used, also enabled Angelina to work remotely, including when she visited her family in Italy. ***“I go to Italy every couple of months because my mum lives down south. For the last two years, I’ve been able to work from Italy using IRIS. It worked really, really well – no issues at all. I don’t think I’ve ever been logged out of IRIS Hosting; it was completely seamless. That ability to work from anywhere is a huge benefit to a modern practice.”***



A power-user perspective

Nicola David, Business Services Manager at the firm, also depends heavily on IRIS across a wide range of tasks. ***“My main role is managing staff, but I also look after account production, limited company accounts and sole trader accounts.***

I use Personal Tax and P11D to do returns.”

Practice Management also plays a central role in her workflow. ***“I update job stages every single day for any jobs I’m working on, whether it’s bookkeeping or VAT.”***

Nicola is the head of the VAT and bookkeeping department and frequently uses IRIS VAT Filer. ***“In a nutshell, I use IRIS products quite a lot”*** she says. She also regularly works with IRIS KashFlow for client bookkeeping and highlights the importance of IRIS OpenSpace. ***“It’s massively used. All of our clients generally use it to obtain their documents and do their approvals.”***



Nicola David,
Business Services Manager





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As Business Services Manager, Nicola is an enthusiastic supporter of IRIS. ***“I am actually really happy with IRIS. If there’s ever any chatter about looking elsewhere, I’m like, ‘Nope, we’ll stay with IRIS!’”*** A feature that particularly impressed her was the ability to import directly into Personal Tax. ***“Finding out that you can import into Personal Tax was a revelation. Just that in itself, and then getting your tax computation off that and filing it with HMRC – it simplifies things so much. I’m a bit of an advocate when it comes to the accountancy big boy stuff,”*** she laughs.



Preparing for the MTD transition

As part of preparations for Making Tax Digital (MTD), Thompson Taraz Rand has been taking proactive steps to ensure a smooth transition. ***“I’ve put together some fact sheets and found the last bits of information I needed on how to migrate individuals from our agent gateway onto the SAA,”*** explains Angelina. With a meeting scheduled to begin organising the migration, the team is focused on getting clients set up for testing.

A key discovery that eased the process was learning that there is a phased approach to MTD. ***“We can do it throughout the year and just backdate the quarterly reports, which will be great because we can then do it in stages. This approach allows us to set up the allocation gradually, so that it’s not all left to the last minute. We want to try and make the transition as easy as possible,”*** says Angelina.



"We use Accounts Production and Business Tax, and we have clients with rental, interest, and dividend income, who are also directors of other companies, so it'll make more sense to get it all done in IRIS to keep everything consistent."

Angelina expressed her satisfaction with IRIS, noting, ***"I've always liked IRIS. I absolutely love Accounts Production, Business Tax, and Personal Tax. The fact that we are able to do a lot of the MTD stuff through IRIS was a big game-changer for us."***

Nicola agrees that the recent IRIS Customer Connect event helped simplify the MTD transition. ***"It put our minds at ease, especially with the functionality available in Personal Tax and what it allows you to do. The ability to download a CSV, send it to the client to fill in, and then have them send it back has been incredibly useful... We literally left the place on cloud nine."***





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Embracing digital transformation

Thompson Taraz Rand recently acquired another business that was operating purely on a paper-based system. ***“I had the chance to visit the office, and I literally couldn’t walk anywhere because there were files everywhere,”*** recalls Angelina. Nicola adds, ***“They were sending payslips, payroll, and invoices to clients by post.”***

The acquired team had been using Digita, but has since been fully transitioned to IRIS. ***“The clients were none the wiser, and the staff adjusted just fine,”*** says Nicola. ***“We had support from someone who knew IRIS well, and the migration was seamless. IRIS also assisted with the transition.”*** Now, the entire team benefits from digital flexibility. ***“We’ve got about 35 machines,”*** Nicola explains. ***“A lot of us are on laptops so we can work from different locations including client sites or from one of our four offices.”***



Training and continued learning

Both Angelina and Nicola see ongoing training as key to getting the most out of IRIS. ***“Just from what we learned at IRIS Customer Connect – me and Angelina didn’t even realise some of the functions and tools were there,”*** says Nicola. ***“And the training centre! I didn’t know about that. We’ve got a trainee, and I’m like, ‘This is going to be great.’ They can just watch the videos and refer back when they start using it properly. It’s free, and that’s massive – it really helps us without needing to build our own training videos.”***

Even after years of using IRIS, the team knows there’s more to explore. ***“I am a big advocate of IRIS. It’s got so much more potential than what we originally thought. We don’t even use a fraction of what it can do,”*** says Angelina. ***“Which is a positive thing because there’s always space for improvement. I absolutely love the product. I think it’s amazing what it can do.”*** Looking ahead, the firm is also exploring a transition to IRIS Elements, as they continue their journey of modernisation, training, and putting clients first.

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