



Rawlinsons partners with AutoEntry in order to eliminate manual data entry and support its cloud accounting services

OVERVIEW

Rawlinsons is a leading accountancy practice, specialising across a range of industries from agriculture and education through to charity and public sector. An established firm operating for more than 75 years, Rawlinsons offers a diverse portfolio of services, from tax advisory to payroll and investments.

Rawlinsons faced operational challenges and time constraints relating to bookkeeping and data entry of paper documents, including bank and credit card statements, receipts and invoices. In order to address these issues, Rawlinsons partnered with AutoEntry. Since adopting the solution, Rawlinsons has been able to streamline back office services, whilst significantly increasing productivity and helping clients prepare for MTD.

ELIMINATING MANUAL DATA ENTRY

Rawlinsons had been challenged in meeting the growing demands of data entry from customers within its cloud accounting division, Rawlinsons Connect. The accountancy firm had been receiving hundreds of financial documents each month, including bank and credit card statements and invoices, resulting in a substantial amount of paperwork to file by hand. Therefore, Rawlinsons decided to automate this process with AutoEntry.

Luke Quince, cloud accounting manager at Rawlinsons comments, "As part of our service offering, we ensure our customer's accounting systems are equipped to work as efficiently as possible. Therefore, we wanted to phase out any manual data entry, which we

believe to be an outdated and unnecessary practice in today's digital age. To do this, we sought out AutoEntry and following a demonstration of the software, immediately signed up, having been impressed by the range of intelligent, in-built features the solution offered."

DRIVING BUSINESS EFFICIENCIES

Rawlinsons benefits daily from AutoEntry's intelligent features. This includes its ability to accurately capture data from scanned and photographed images of paper documents - whether they're computer generated invoices, or hand-written ones, AutoEntry interprets all with ease. AutoEntry is also able to capture full line items, including the description, unit price and quantity for each line, as well as syncing captured invoices to matching, open purchase

“Partnering with AutoEntry has proved to be an excellent decision for us. In one fell swoop, AutoEntry has eliminated the time-consuming process of analysing and manually typing up financial documents, including bank and credit card statements, invoices and receipts - saving us a considerable amount of cost and resource. AutoEntry is so versatile and easy to use, there's no doubt that we'll continue to leverage the solution moving forward.”

- LUKE QUINCE, CLOUD ACCOUNTING MANAGER, RAWLINSONS



orders. Once the data has been captured and analysed, the solution provides seamless and secure integration, with a range of cloud accounting providers such as QuickBooks, Sage and Xero.

Luke Quince comments, “AutoEntry’s unique features makes end-to-end bookkeeping for us more efficient. It also reduces human error, as the software accurately automates data into the correct fields, enabling us to spend more time reviewing the aggregated data for our clients, rather than entering it ourselves.”

FAIR AND FLEXIBLE PRICING

In terms of billing, Rawlinsons values AutoEntry’s flexible pricing plans. Unlike other vendors, AutoEntry doesn’t tie users into costly fixed subscriptions, and one pool of credits can be used across multiple companies and document types. These credits also carry over from one month to the next, allowing management to only pay for the documents uploaded onto

AutoEntry, as needed.

Luke Quince comments, “AutoEntry’s credit system is the cherry on top, and means we pay only for what we use, rather than a flat rate charge. This ultimately means we can pass on this saving to our customers, by reconciling their accounts and delivering services faster.”

PREPARING FOR MTD

The digitisation of the UK tax system through HMRC’s ‘Making Tax Digital’ (MTD) will come into effect over the next few years and Rawlinsons is keeping ahead of these changes, by preparing its clients via personalised consultation and seminars. As AutoEntry is fully compliant with HMRC’s forthcoming legislation, it will play a key role in supporting Rawlinsons ahead of this transition.

Luke Quince comments, “We’re committed to helping our clients understand and prepare for MTD, and we’ll continue to provide need-to-know updates and information in the months

ahead. We may receive a wave of new clients as we approach the deadlines, and AutoEntry will be key in helping us support this new business. As AutoEntry is so easy to use, we’ll also be encouraging customers to use the solution themselves when scanning documents and filing quarterly reports.”

NEXT STEPS

Rawlinsons will continue to convert more of its clients to the cloud, in order to help them to streamline administrative processes and grow their businesses.

Luke Quince sums up, “We’ll continue to advance our digital-first strategy to ensure our customers receive the best possible service when working with us. AutoEntry will be key in supporting our future growth and providing us with the strategic technological infrastructure needed to reduce the paperwork and scale our services to more clients.”