



Simply Balanced Solutions partners with AutoEntry to reduce paperwork and grow its practice

OVERVIEW

Based in South Hampshire, Simply Balanced Solutions offers bookkeeping, VAT and payroll services to small businesses across the UK.

An advocate of digital accounting and a long-term user of AutoEntry, Simply Balanced Solutions joined the AutoEntry Partner Program, having leveraged the solution to effortlessly eliminate manual data entry for its bookkeeping customers.

CHOOSING THE RIGHT SERVICE PROVIDER

Simply Balanced Solutions wanted to adopt a data entry solution which was both easy to use and quick to act. The firm was also looking for a service provider which offered flexible billing to support quarterly bookkeeping and accommodate fluctuations in workload. After comparing the marketplace,

Simply Balanced Solutions chose AutoEntry in April 2016.

Alison Edward, founder of Simply Balanced Solutions, comments, "Choosing AutoEntry was an easy decision for us; the solution offers unparalleled functionality for a great price. We love that we only pay for the documents we upload onto the platform as needed on a monthly basis, which keeps bills low for us and our clients. The solution accurately posts client data into our QuickBooks or Xero account, and saves us even more time by remembering how we process invoices and receipts, including which tax codes we assign."

SERVING MORE SMALL BUSINESSES

Simply Balanced Solutions works with clients across a variety of sectors including construction and

manufacturing, as well as service-based businesses such as graphic designers. It receives thousands of bank and credit card statements, bills and receipts to process, and therefore needed a solution which could flex to accommodate this broad range of documents.

Alison Edward comments, "AutoEntry is so versatile, it enables us to work with customers we wouldn't be able to work with otherwise due to the administrative demands of the project. For instance, in processing large quantities of historic bank statements when bank feeds are unavailable. The mobile app works like a charm, and lets us snap receipts and bills on the move, and to monitor the progress of items uploaded onto the platform when we're out of the office."

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“AutoEntry is so quick and easy to use, it's become an indispensable part of our day. By working digitally, we're able to take on more new clients and deliver services faster to our existing customers. We've been so impressed with the ROI gained from leveraging AutoEntry over the last year, that we've joined its partner program to help extend the reach of the solution to more of our SME clients and associates.”

- ALISON EDWARD, FOUNDER, SIMPLY BALANCED SOLUTIONS



WORKING FASTER, POWERED BY DIGITAL INNOVATION

Simply Balanced Solutions values the range of time-saving features offered by AutoEntry. Clients that raise purchase orders typically have strong inventory needs and want detailed line items on their supplier invoices. AutoEntry can both scan these into accounting software and sync those bills against purchase orders. Once the data has been securely posted into a user's bookkeeping solution, AutoEntry creates a digital record of the image and attaches it to the transaction, giving users better visibility of their data, whilst enabling them to reduce their consumption of paper.

For customers with foreign currency needs, AutoEntry displays the Net, VAT and Total as per the invoice and displays the currency used. If the currency differs from the home currency of the company, AutoEntry can convert the total using the exchange rate from the date of the invoice.

Alison Edward comments, "We're processing more than 500 documents a month onto AutoEntry, which saves us approximately 25 per cent in time, than if we were to do it by hand. We can use this time to focus on marketing our services and taking on more new customers. In addition, with all of our data stored and categorised on the cloud, we can streamline other processes such as VAT inspections, as we can find the documents we need, faster."

JOINING THE AUTOENTRY PARTNER PROGRAM

AutoEntry has grown to be a valuable resource for Simply Balanced Solutions, helping the firm to drive enhanced operating efficiencies and revenues since its deployment. Therefore, Simple Balanced Solutions joined the AutoEntry Partner Program in Mid-2018.

Alison Edward comments, "Long hours spent on labour intensive, manual processes diminishes profits and depletes the resources needed to drive

business growth. With that in mind, we joined the AutoEntry Partner Program to help more of our clients and associates profit from leveraging the solution as we have done. We were also keen to benefit from the benefits the program offers to partners."

MOVING FORWARD

Simply Balanced Solutions will continue to grow its practice and work with more small businesses in the years ahead; with AutoEntry keeping the paperwork manageable.

As AutoEntry is compliant with major legislative bills including the EU General Data Protection Regulation (GDPR) and HMRC's Making Tax Digital (MTD), Simply Balanced Solutions will rely on AutoEntry to support its customers in working alongside these laws in the long-term.