Carr Accounting chooses AutoEntry to reduce paperwork and grow its practice

OVERVIEW

Carr Accounting is a family run firm based in Paisley, Scotland. The practice serves a wide range of industries and offers general accountancy and tax services, as well as business development advice.

A long-standing customer of Sage, Carr Accounting wanted to simplify more of its back office processes including bookkeeping data entry. Therefore, it decided to implement Sage add-on, AutoEntry, in order to automate this function in the long-term.

WORKING MORE EFFICIENTLY WITH TECHNOLOGY

Sage 50c is an accounting solution for small and medium-sized businesses and has been leveraged by Carr Accounting in order to manage reporting for clients and streamline processes such as accounts payable/receivable, and cash flow management.

Another line of business Carr Accounting wanted to simplify was bookkeeping data entry, which was taking up too much time and resource when processed by hand. To complement its existing use of Sage, Carr Accounting was looking for an application which could integrate easily with the software.

Steven Carr, founder of Carr Accounting comments, "Data entry was a growing challenge as we expanded and took on more bookkeeping customers. As a service provider, every hour counts, and we recognised that manually typing up data by hand was an ineffective use of our employee's time and an expensive way to work. To eliminate this process, we sought out AutoEntry."

GETTING STARTED WITH AUTOENTRY

AutoEntry is available via the Sage marketplace and takes just minutes to sync with. New customers are eligible for a free trial, with training and customer support available around the clock.

Steven Carr says, "Firstly, as we use Sage 50c as a desktop application, finding data entry software which could integrate with it was extremely challenging, in fact, AutoEntry was the only solution we found which met our requirements. We had heard so many positive recommendations for AutoEntry, we decided to meet the team at a conference and book in a demo. AutoEntry as a web or mobile app is easy to use, but once we signed up, we were given one-on-one instruction to ensure our team can

> "The application of the right technologies has greatly improved our productivity and created the capacity for us to grow our practice. It has also enabled us to strengthen our existing customer relationships, by reducing paperwork and providing greater visibility into our client's data. One of our goals this year was to eliminate manual bookkeeping data entry and AutoEntry has helped us to achieve exactly that, by automating this process and integrating seamlessly with Sage."

- STEVEN CARR, FOUNDER, CARR ACCOUNTING

Carr Accounting
Modern Accountancy ~ Traditional Values

Website: www.carraccounting.co.uk
Telephone: +44 0 141 842 1133
Email: info@carraccounting.co.uk

leverage the solution to its full potential."

BUILDING CLOSE CUSTOMER RELATIONSHIPS

Carr Accounting works closely with its customers to understand their challenges and goals, in order to recommend a tailored course of action.

Steven Carr says, "People buy people, and we pride ourselves on offering our customers attentive service at a fair price, which is why our customers stay with us year after year. We believe that as an accountant, attention to detail and careful analysis of financial data is key in order to help businesses unlock new opportunities and increase revenues."

Steven Carr continues, "In order to maintain this hands-on approach, we didn't want to spend any more time than necessary on admin and paperwork, so automating certain processes is important to us. Sage and AutoEntry work perfectly together and help us to get back to what really

matters; serving our customers and growing our business."

A FAST AND FLEXIBLE SOLUTION

Since deploying AutoEntry, Carr Accounting uploads thousands of paper documents onto the platform on a monthly basis, namely bank statements and purchase and sales invoices. The data is analysed before being posted securely into Sage, or downloaded into excel. This function is especially useful if users don't have access to bank feeds, as the solution can process both PDF files from online banking accounts, as well as scanned copies of paper statements.

Once these documents are uploaded onto AutoEntry, it can extract details such as the account number, description and balance on each document. The 'Activity' tab offers helpful real-time status updates for files being processed.

Steven Carr remarks, "AutoEntry has become a solution we leverage every

day and has transformed a once laborious process; saving us upwards of 50 per cent in time. It's eliminated instances of human error and allowed our employees to spend less time on paperwork and more time securing new business and delivering advisory services."

NEXT STEPS

Carr Accounting will continue to leverage Sage and AutoEntry in order to work more efficiently, and in the long term, to support the firm in preparing for changing government legislation such as HMRC's Making Tax Digital.

Steven Carr sums up, "The strategic investment into the right technology was a game changer for us, and we've driven significant ROI since adopting Sage and AutoEntry. With this IT support, we feel our possibilities are limitless, and moving forward, we'll automate even more functions in order to propel growth."