



Brisbane-based bookkeeping practice saves 30 hours a month, by automating its data entry with AutoEntry

IN BRIEF

The Annerley branch of First Class Accounts automated its bookkeeping data entry with AutoEntry. This enabled the practice to:

- ✓ Save 30+ hours a month
- ✓ Spend more time with clients and expand its bookkeeping services
- ✓ Work more flexibly, with AutoEntry's mobile app
- ✓ Effortlessly automate bookkeeping data into a range of accounting solutions, including Xero, QBO, MYOB and Reckon

ABOUT THE PRACTICE

The Annerley branch of First Class Accounts, Australia's largest bookkeeping franchise, is run by certified bookkeeping specialist, Victoria Wilkinson. Among other services, the practice offers financial analysis, debt and cash flow management, payroll and superannuation.

With over ten years experience helping clients manage and grow their

businesses, Victoria Wilkinson wanted to focus more attention on exactly that - and less time on unnecessary paperwork and bookkeeping data entry. Therefore, the practice decided to automate this function with AutoEntry in late 2016.

WORKING MORE EFFICIENTLY IN THE CLOUD

Cloud accounting software allows First Class Accounts, Annerley to reduce operating costs and more easily manage its finances. Victoria Wilkinson is a certified Xero advisor and a partner of both MYOB and Reckon. The practice also leverages QuickBooks Online as needed.

Victoria Wilkinson comments, "By securely hosting our data online, accounting software allows us to access our financial records, at any time and on any device. It allows us to automate inefficient processes and provides us with data-driven insights to help us

make faster and more informed decisions."

With many of its processes already automated, First Class Accounts, Annerley wanted to eliminate manual data entry, which was detracting time from more valuable customer-focused activities.

Victoria Wilkinson remarks, "We had used data entry solutions before, but we wanted one which could integrate with all of the accounting software we leveraged, and especially Reckon One, which was difficult to find a data entry add on for. When testing AutoEntry, we were very impressed with the strength of the integration it offered with all of these solutions, so we continued to use it full-time after our free trial had ended."

SAVING TIME WITH AUTOMATION

Before automating its data entry, First Class Accounts, Annerley needed to

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“AutoEntry has been a strategic investment for us, and one which has enabled us to stop spending countless hours typing data into our accounting software. Since using AutoEntry, we've saved over 30 hours a month, which is a huge amount of time for a small practice like ours. AutoEntry is so easy to manage, and with its very reasonable pricing, it's undoubtedly the best choice for our business.”

VICTORIA WILKINSON, BOOKKEEPER, FIRST CLASS ACCOUNTS



post hard copies of documents to other members of the team to reconcile, with employees spending hours each month typing in data by hand for clients. Now with AutoEntry, that process has been transformed. The firm is able to swiftly upload hundreds of purchase invoices and receipts onto the platform through AutoEntry's web or mobile app, saving the business more than 30 hours each month.

Victoria Wilkinson notes, "We think it's essential for bookkeepers to use automation to retire outdated processes and focus more time on business development initiatives for customers. AutoEntry helps us to work so much more efficiently, and we love its range of time saving features, such as its ability to capture full line items, including the description, unit price and quantity for each line on an invoice."

Victoria Wilkinson continues, "Our customers can use their smartphone to snap pictures of their receipts on the move, with this data uploaded onto AutoEntry in seconds. We've reduced our time spent on data entry from hours to minutes, saving as much as six hours a month for one particular client alone."

SUPPORTING A REMOTE WORKFORCE

As AutoEntry is a cloud-based solution, users can access their data at any time and on any device. It gives businesses

visibility of files that have been uploaded and processed by AutoEntry across the companies set up on a user's account. It also shows the movements of these documents after processing, and the user who undertook these actions.

Victoria Wilkinson comments, "Certain members of my team work in different parts of the state so by storing our information in the cloud, AutoEntry helps us to collaborate more easily. We love how once AutoEntry has captured and entered our data, it creates a digital record of the image and attaches it to the transaction in our accounting software. This means we no longer need to store paper copies of documents, allowing us to dramatically reduce our consumption of paper."

FAST AND FRIENDLY CUSTOMER SERVICE

First Class Accounts, Annerley values the attentive customer support offered by AutoEntry, delivered by its in-house customer service agents and technical specialists. If a user needs assistance, they can instantly reach the team via AutoEntry's in-app chat feature, or email.

Victoria Wilkinson comments, "The customer service we've received so far has been outstanding, and the team always responds swiftly to any queries."

COST EFFECTIVE SOFTWARE

AutoEntry offers users unbeatable value for money through its uniquely flexible pricing plans. Pricing is based solely on credits and is billed as a monthly subscription, adding more client companies or employees incurs no extra charges. Users are charged only for the documents they upload onto the platform, as needed each month, with unused credits rolling over to the next month

Victoria Wilkinson comments, "AutoEntry offers extremely reasonable prices for the high quality of service it delivers. I love that other members of the team can leverage AutoEntry at no extra cost and that we can use credits to serve our smallest bookkeeping clients on an adhoc basis. This makes it a very affordable solution for smaller bookkeeping practices."

A SMART SOLUTION, SUPPORTING FUTURE GROWTH

First Class Accounts, Annerley, will continue to leverage AutoEntry in the future, and as it takes on more clients. The firm will continue to explore its range of time-saving features, and leverage more of these as needed, such as the ability to capture GST rates and match purchase orders to invoices, as well as extracting data from bank statements and sales invoices.