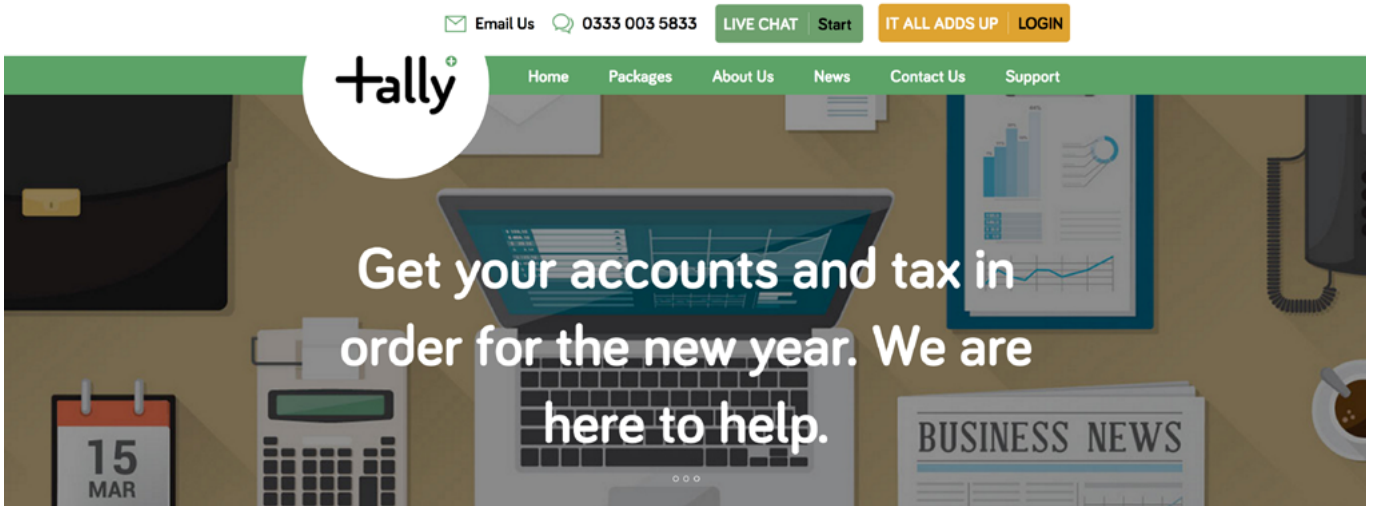.**IRIS**

KashFlow online accounting software marks a major milestone in Tally Accounts' digital journey

CUSTOMER PROFILE
Tally Accounts is the digital arm of Deans (Staffordshire) Limited, a practice now in its 125th year. Today, nearly 30 members of staff serve clients in sectors as diverse as agriculture, retail and engineering.

BUSINESS CHALLENGE
To take advantage of cloud technology to support internal efficiency and build close collaborative relationships with clients.

SOLUTIONS USED
IRIS Accountancy Suite
KashFlow
IRIS OpenSpace
IRIS OpenHosting

Deans is a long-time user of IRIS accountancy solutions. Partner Richard Stonier says, "It would be difficult to think of an IRIS product we don't use, either for client work or for managing our practice."

In 2015, the three partners decided to start the transition to a more online way of working. Richard comments, "We are forward-thinking in adopting new technology, believing that you lead by example or risk falling behind."

IRIS was the obvious source of solutions. IRIS OpenSpace for online collaboration was the first step to becoming a digital practice. Richard notes that being able to 'white-label' the software as the practice's solution aids user acceptance, as clients see it as all part of the service.

The relocation of critical IT systems from within the office to remote hosting came next, as Richard explains, "Our server was nearing the end of its useful life and IRIS OpenHosting offered us a highly secure, reliable hosting service

Compliance covered
As an early adopter of online record-keeping, the practice is in a good position to adjust to HMRC's Making Tax Digital strategy

Available anywhere
Clients can manage their business through their smartphone, tablet, computer... in fact from any device that connects to the internet and from any location

Collaboration
Data entered by the client feeds into practice accounting systems

Paperless
Online record-keeping replaces paper-based accounts and has greater value for clients

Excellent support
IRIS has helped the practice team and clients to make the transition to using KashFlow

for both our IRIS software and desktop applications such as Microsoft Office products, all at a standard monthly charge."

Richard points out that the move to digitalisation entails more than just choosing the right software: "We have worked hard behind the scenes to update and streamline our internal processes; for example, enabling senior staff to approve outgoing post digitally. Now our back-office is completely digital."

> *"Now, from start to finish the client's interaction with us is integrated and online: from signing up and receiving the engagement letter, through anti-money laundering, to day-to-day communications and collaboration."*

A new way of working with clients
The next step was to look beyond internal working practices to encourage clients to work online. Richard says, "With our track record of building our practice on IRIS software, we knew that KashFlow, the IRIS online accounting software for small business owners, would be worth a closer look."

Richard and his fellow partners decided to offer clients KashFlow under its new online brand of Tally Accounts. Once again, the KashFlow software has the look and feel of a Tally Accounts solution, so clients regard it as part of a seamless software suite.

The practice adopted a staged approach, gradually moving clients over to KashFlow: "We felt our way forward with existing clients, but now we've got traction we offer KashFlow to new clients coming on board. While we'd never turn anyone away, we send out a strong message that this is our preferred way of working, one that suits the modern age and brings distinct benefits to their business."

Extending the reach of the practice
The original Deans practice is firmly grounded in its Staffordshire roots, but having a digital arm has enabled the partners to overcome geographical constraints. Richard says, "With KashFlow, distance is no object, as all interactions are online. This frees us to spread our net more widely and take on clients from across the UK. It's a great example of how advances in digital capabilities open up new ways of working and it demonstrates the advantages of being an early adopter - we're embracing change, rather than sitting on its coat-tails."

Support to make the move
Richard praises the help IRIS provided in making a smooth transition to KashFlow: "We had great support. Not only did we receive training internally, IRIS helped us to tailor nearly thirty short training videos that clients can access via the Tally Accounts website, showing how to use the software."

In introducing KashFlow, Richard and his team have met little resistance among their client base, quite the reverse: "With almost everyone having a smartphone nowadays, working online is the way of the world. Our clients readily engage with the technology and enjoy using KashFlow to carry out transactions such as creating estimates and invoices and to gain an instant snapshot of the health of their business. It's designed with the user in mind, not the professional accountant, and is extremely powerful."

He adds, "When you think back to the days of sending a client a bound set of accounts, it might have given us a sense of pride in a job well done, but the client probably just left it to gather dust on the shelf. What a waste of paper for all concerned. Now, from start to finish the client's interaction with us is integrated and online: from signing up and receiving the engagement letter, through anti-money laundering, to day-to-day communications and collaboration."

The next challenge around the corner: Making Tax Digital
The practice team is keeping a watchful eye on HMRC's Making Tax Digital strategy as it takes shape in replacing annual reporting with quarterly reporting.

Richard says, "Some small businesses don't even have a computer - let alone accounting software - and there's concern within the accountancy profession that the quarterly reporting required under Making Tax Digital will mean clients bringing in a carrier-bag of receipts not just once, as happens now, but four times a year. Practice time will be diverted from higher value work and their teams will be forever trying to catch up."

He contrasts this scenario with the situation at Tally Accounts: "With KashFlow, clients enter data into their software on a regular basis. This generates a flow of data that feeds into our IRIS software and in-house processes. As a result, with one or two easy tweaks, Tally Accounts is in a good place as the countdown to Making Tax Digital begins and we can face the future with confidence."