

# The power of integration draws David Scott & Co back to the IRIS Accountancy Suite

## About David Scott & Co

David Scott & Co is a Chartered Accountancy practice based in Newton Aycliffe in County Durham. At the helm is David Scott, a sole practitioner with over thirty years' experience, who is assisted by his wife and daughter.

David's practice covers a diverse range of clients. His particular specialism is tax planning and tax credits, a subject on which he is often invited to present as an expert speaker. He has recouped around £250,000 in tax credits for clients in the past 18 months alone.

A long-time user of IRIS Accountancy Suite solutions, in early 2011 David moved to another software provider in the breathing space between the busy tax returns period and the deadline for mandatory submission of electronic tax returns. He comments, "Like any sensible business owner, I review my outgoings regularly and spotted a rival set of accountancy products with a lower price tag than IRIS."

David was promised that he would continue to experience the same functionality as when using IRIS software and received assurances that migrating to the new software would be smooth and easy. However, the reality turned out to be somewhat different.

## A daunting task

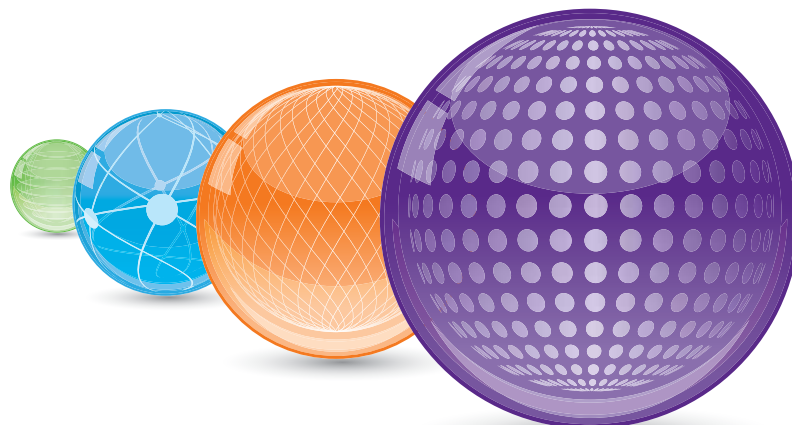
David accepted that the move might require learning new techniques and codes, but was shocked at the effort required to set up a company on the new system: "It migrated clients' personal tax data across - including old clients from way back, who then had to be weeded out - but not their accounts information. Each company had to be set up individually."

This proved to be an overwhelming challenge, as David goes on to explain: "I'd been told that I could set up a client by inputting the trial balance for the previous set of accounts. However, for a limited company there is, of course, a great deal of peripheral information in addition to the numbers. I'd been used to IRIS pre-populating the majority of the data, drawing on the centralised database; just click on the button and IRIS pulls up the information for you to add the finishing touches."

The alternative system uses several databases that require user intervention and even then not all of the data migrates across. This meant that client information now had to be keyed in from scratch. David says, "The contrast was startling. Take the CT41G form, for example. I had to manually enter all the information such as the registered office, company number, accounting dates, directors' addresses and National Insurance numbers."

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David Scott, David Scott & Co



A quick calculation showed the scale of the problem: "I timed myself working steadily and it took over 45 minutes to set up one company of below-average complexity. I realised with horror how long it would take to transfer my whole base of eighty to a hundred clients, at around an hour each.

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David recognised that the lack of integration would doubtless lead to inefficiencies in the future in other client work.

### All's well that ends well

David has returned to using a core set of IRIS Accountancy Suite of products - Accounts Production, Business Tax and Personal Tax - which he regards as 'the money-earners' of his practice.

He is happy to be back in the IRIS fold, saying, "It works and it's wonderful. The whole experience of trying another provider proved extremely frustrating and stressful. When I went back to IRIS, my wife says she got back the man she married!"

### Hidden costs

As David's experience shows, an attractively priced competitive solution can work out more expensive in the long run, when the investment of time and effort required to achieve the same results is factored in.

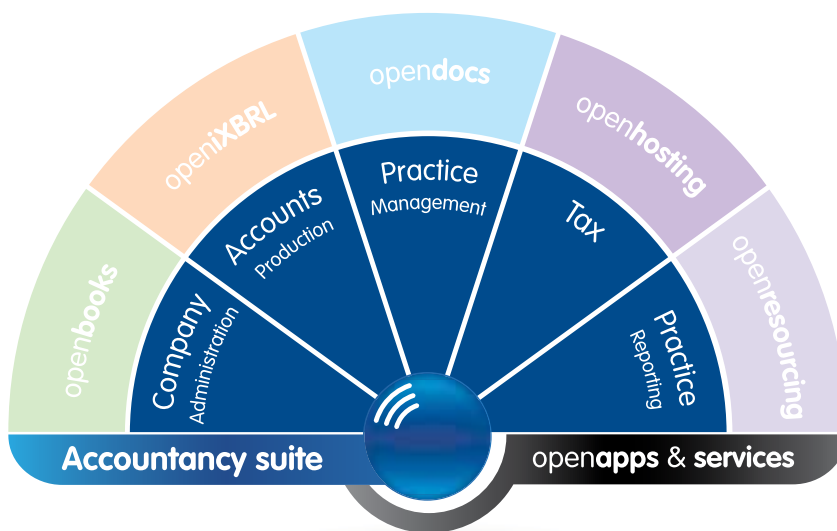
David adds, "You certainly get what you pay for. The surprising thing is that I took soundings from three other practices before switching and they were all happy with the other system. I can only think that they've never used IRIS and don't know what they are missing!"

### Solution summary

- Data automatically from the single, centralised database, minimising for re-keying
- Time freed from data entry for fee-earning work
- A suite of products that efficiently supports the day-to-day work of the practice

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