

CCH iFirm

Clifton Accountants

CCH iFirm and CGT Reporter Deliver Cloud-based Business Efficiencies for Clifton Accountants Practice Locations

Summary

Company profile

Name: Clifton Accountants
Region: Australia
Operation: Accounting and Business Advice
Products: Enterprise advice, tax and succession planning
Employees: 13 employees
Website: www.cliftonaccountants.com.au

Challenges

- Integrate and amalgamate two fairly large client databases, running on another vendor's proprietary software, and merge them
- Establish easy access to all client records and reference materials, either in-house or from remote locations

Solution

- CCH iFirm Practice Manager
- CCH iFirm Client Accounting
- CCH iFirm Intranet
- CCH iFirm Portal
- CCH iFirm Paperbuster
- CCH iFirm Documents
- CCH iFirm CGT Reporter

Over the years, this client base has further expanded, to the point where Clifton Accountants provide accounting and business advisory services to clients in every state in Australia. This requires a broader and deeper knowledge of small business owners' tax, advisory and wealth management needs, rather than specialising in any industry.

Clifton Accountants came to realise the need to integrate a client base that was split across two offices to overcome the inefficiencies from having each office running its own version of Sage HandiSoft.

“ Myself and one of our partners were always splitting our time between the two offices, which meant we had to always be on remote access to the other office, which was a bit cumbersome..

Brian Bramble, Managing Partner, Clifton Accountants

A presentation at an industry conference tipped the scales in favour of the CCH iFirm software suite. Comparable Xero modules did not stack up against CCH iFirm, which was the only solution offering the deep industry expertise and extensive tax knowledge databases available from Wolters Kluwer, CCH.

Another differentiator for CCH iFirm is the level of support on offer, from the expertise delivered by the CCH consultants on the ground during the initial scope of works and implementation period, to the ongoing online assistance that is available, Clifton Accountants felt confident that help would always be at hand.

“ We always had access to the resources that we needed with our initial consultant Mel, and we felt that the implementation was outstanding. The follow up webinar training for the entire team was very convenient and made sure that we moved onto our new solution as a team – it is a great initiative.

Brian Bramble, Managing Partner, Clifton Accountants

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A cloud-based solution for a ‘pro-cloud’ accounting practice

Cloud removes the need to purchase and maintain servers, while giving re-assurance that data backups are regularly done.

“ We are very bullish about cloud. It makes sense for us to have access for ourselves and not necessarily be tied to the office. When we’re out with clients we can access data, and we can all work from home when necessary. We already have clients in every state. Using cloud-based solutions enhance not only client retention, however using CCH iFirm gives us the ability to upsell a client on our other services, enabling us to do more value based work for them.

Brian Bramble, Managing Partner, Clifton Accountants

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Practice manager reporting across the board

With CCH iFirm Practice Manager, workflow planning and management are all part of the one system, with a dashboard and a range of search filters that lets partners track the progress of jobs against budgets, allocating the relevant resources while ensuring any issues can be dealt with as they occur.

For a number of years Clifton Accountants has been using upfront pricing of jobs, so the ability to track progress is crucial for effective cost management, along with setting work priorities for all team members.

Similarly, for recurring jobs, having the process automated saves on administration time and cost as year-end close off dates approach.

Use of the dashboard makes it clear how work is progressing, and that increases accountability among all members of the team.

One specialist function that has delivered an unexpected benefit to Clifton Accountants is that the CCH iFirm solution allows for multiple tax agents’ licences within the same firm, a situation the previous software system was unable to accommodate.

Client accounting

The CCH iFirm Client Accounting module allows accountants to drill down to trial balance, and to source transactions. The specialist solution also lets accountants import data from multiple sources such as spreadsheets and provides seamless integration with other accounting and reporting systems used by business clients, such as MYOB, BankLink and Xero.

The end result is one set of reporting data, and when any change is made, it flows through to all accounts. In the past Clifton’s had to manage that process manually.

Capital Gains Tax reporter is the go-to source of knowledge

With cloud based systems, updates are fast and easy, even for the most technical subjects. Clifton Accountants have used CCH CGT Reporter for about 10 or 11 years, from when it was on disk, and accessible only from one computer. Now it is also a cloud –based offering through CCH iFirm.

CGT Reporter has all the historical dividends, corporate actions and share price data for every listed company and trust in Australia since 1985.

“ It’s very much a staple of our system, and a go-to resource for our team. Access was more difficult, so having it now available through our CCH iFirm site, available to all the team, all the time, is a huge advantage.

Brian Bramble, Managing Partner, Clifton Accountants

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CCH iFirm is the next-generation cloud-based suite of software allowing accountants to run more efficient and profitable firms. The CCH iFirm suite includes Practice Manager, Tax, Client Accounting, Web Manager and Document Manager.

CALL US TO FIND OUT MORE

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