



Case study

CCH Practice Management & CCH Central

Stanley Woods & Co

Stanley Woods & Co is based in Newtownards, 10 miles east of Belfast. Now over 75 years old, the practice recently moved into new, purpose-built offices. Proprietor William McAdam and his staff of six provide accounting, tax, auditing and business advice to around 500 clients.

“The best thing about CCH Central is that it brings information together into a single database. Before, we’d be updating information in three or four different places; you might change it in practice management but the tax return would still go out to the old address, which didn’t look good. Now we don’t have to worry about keeping the databases synchronised - just one change and you know it’s done right across the board.

It’s also a lot easier to access and use the information that’s there. For example, in the old practice management system the back office functions were split from the front office functions so it was sometimes difficult to get an overall picture of what was going on. The information was there but you had to move around the program to find it.

Now you can display whatever you want on your own ‘home page’, but there’s security so that you can restrict access if you need to. The new front end is very simple to use.

The home pages help me keep track of what’s happening in the practice. I can keep an eye on WIP, debtors, what people are working on and how long they’ve spent on each job. Many of our clients have been with the firm for a long time and they don’t expect their fees to fluctuate too much, year on year, so it’s important to avoid excessive over-runs and write offs. I’m solely responsible for the billing but there are five other fee earners in the firm, so it’s very useful to have this kind of information at my fingertips.

CCH Central brings all the programs together into one integrated system so that functions like reporting work the same way across the whole suite. This makes them easier to learn and use.

There are other benefits, too. For example, sometimes HMRC send us forms which only have an NI number on them and no names, or they send a refund to our client’s account and only give us the UTR. In cases like this we can easily search the Central database to find the correct

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client and then drill-down into the information that's held in CCH Personal Tax. As well as NI number and UTR, there are a number of ways of searching the database and some of these are very useful for tax planning purposes, for example filtering by date of birth, income, income sources or other characteristics. Wolters Kluwer supply some standard reports that can be run with these kinds of filter but I've also written a few of my own.

I've always enjoyed working with Wolters Kluwer software. Now, by giving us better and easier access to the information we hold on our clients, CCH Central is opening up new opportunities for us."

William McAdam
Proprietor

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Find out how we can help

www.wolterskluwer.co.uk/software



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