Sagars Accountants Ltd partner with AutoEntry to grow bookkeeping services

OVERVIEW

Sagars is one of the largest independent accountancy firms in Yorkshire providing a range of services including cloud accounting, audit, taxation and corporate finance. Winners of multiple industry awards, Sagars prides itself on building long-term relationships and giving the very best advice, delivered by its team of seasoned advisors.

Although the firm wanted to expand its cloud accounting and bookkeeping services, the manual entry of paper documents like bank statements, receipts and expenses meant it faced administrative challenges and time constraints. Partnering with AutoEntry has enabled Sagars to address these issues and, since integrating the solution, they've significantly enhanced productivity and freed up capacity, enabling the company to take on more clients and become more competitive.

SCALING ITS BOOKKEEPING SERVICES

Sagars supports businesses with migrating to the cloud and selecting the right accounting solutions to meet their needs. A partner of leading cloud accounting providers including Xero, QuickBooks and Sage, Sagars assists clients with software integration, as well as the data transfer between accounting platforms, providing bespoke training as needed.

Paul Lodder, partner at Sagars explains, "We urgently needed to adopt a new solution for our bookkeeping practice to automate the extraction of data from bank and credit card statements. We saw an AutoEntry demonstration and signed up immediately. For us, AutoEntry ticked all the boxes in terms of product quality, usability and price. Following a swift installation, we were given a team-wide training session so that we could start taking advantage of the solution straight away."

DRIVING BUSINESS EFFICIENCIES

Before partnering with AutoEntry, manually extracting and uploading data from hundreds of paper documents demanded a significant amount of Sagars' resource.

Paul Lodder explains, "Manual data

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AutoEntry has become a key resource for Sagars and is a crucial component of our ongoing digital strategy. It's provided us with the required automated intelligence to expand our bookkeeping services and gain a competitive edge. Our team and clients have adapted quickly to the solution and we've see major productivity gains. We look forward to building on these efficiencies moving forward."

- PAUL LODDER, PARTNER, SAGARS ACCOUNTANTS LTD

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entry was a major pain point for us. We have a talented team and want to ensure that our people feel valued and challenged. We were aware that long hours spent typing up data was frustrating, unfulfilling and a poor use of our people's time. We can typically receive up to 500 purchase invoices from a single client at a time which used to equate to around two full days of manual data entry. Now with AutoEntry, time spent processing these documents has significantly reduced to just a couple of hours. And with that saved resource, the team can now focus on more challenging and interesting lines of business."

AutoEntry has afforded Sagars other time saving features, such as the accurate capture of full line items on sales invoices, with a photographed image providing a digital record for the customer. Elsewhere, AutoEntry extracts the data from bank and credit statements, which once processed, can be downloaded into an excel or CSV file and posted directly into an accounting

solution, such as QuickBooks, Sage or Xero.

Paul notes, "We initially sought out AutoEntry for bank and credit card statement capture as it was the only solution in the marketplace. But we've been so impressed with the efficiency and sophistication of the software that we now use it more broadly, uploading around 2,500 documents onto the platform each month, including invoices and receipts as well as statements. AutoEntry is so intuitive to use that our entire cloud team, including our new starters, are able to manage it easily."

BECOMING MORE COMPETITIVE
By eliminating manual data entry, Sagars has achieved its primary business objective of increasing capacity in order to take on more clients and scale its services.

Paul Lodder sums up; "Before AutoEntry the demands of manual entry meant that, despite our size and expertise, we couldn't compete with

smaller bookkeepers who were solely focused on this function. Now with AutoEntry we're able to offer an efficient bookkeeping service at a competitive rate, alongside our established technical and specialist areas of expertise such as audit, tax, business advisory and corporate finance."

MOVING FORWARD
Moving forward, Sagars will digitise more of its processes to gain further efficiencies and enhance services for clients. AutoEntry will remain in place for bookkeeping services to drive productivity and enable further growth.

Elsewhere, Sagars is keeping one step ahead of industry changes, including with HMRC's pending 'Making Tax Digital' legislation. Sagars will be closely supporting clients and relying on AutoEntry, among other service providers, to make the transition successfully. ▪

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