

Practice and Document Management Case Study

Pinkerton Accountants



“ I can't believe that any practice that churns out reasonable fees would not be using Practice & Document Manager. They create less down time and more billable hours. ”
— Alan Pinkerton, Principal of Pinkerton Accountants

With 20 years accounting experience, Alan Pinkerton readily admits that he wasn't even computer literate at the turn of the millennium, but claims HandiSoft's Practice Manager and Document Manager have been a breeze to use since he instigated their introduction five years ago. His practice also uses HandiSoft's HandiLedger and HandiTax along with Time+Billing.

“In 2007/08, with one full time accountant and a part time assistant we turned over the same dollar value in the business as we did with 10 full timers soon after we entered the new century – much of that has to do with HandiSoft's software,” Mr Pinkerton says.

Practice Manager is a “client-centric” control centre that enables accountants to manage all aspects of their client and team interactions with just a few mouse clicks. Document Manager is an optional module that makes it simple to create and maintain a powerful electronic filing system containing all of a practice's standard letters, checklists and procedures as well as its clients' documents.

Mr Pinkerton says he has personalised Document Manager to work perfectly for his business's needs. “We would have in the region of 150 templates within Document Manager and creating additional templates is easy.”

Mr Pinkerton says Practice Manager and Document Manager are adaptable and dependable and suit the sort of people who are systematic. They are especially relevant to small business “because they save enormous time, money and effort.

“You don't have to spend your time filing documents manually or delegating these documents to someone else to file, let alone searching for documents if somebody has filed them in the wrong place. “Once scanned, papers are there to see for all time. I have 15 years of client returns in our system.”

Mr Pinkerton maintains that Practice Manager and Document Manager allow a practice to work smarter. They have done away with the need for administrative staff in his business and client information is always at his fingertips. “From making a phone call to working on a client file, it is laid out in front of you and so simple to use. You obtain a focused record and an invoice at the touch of a button.”

“They have allowed me to charge out 20% more of my time and concentrate on clients who value excellence in accounting. HandiSoft's software has enabled my profitability to increase to that which would have only been feasible for a significantly larger practice a few years ago.”

Speaking about the power and merits of Practice Manager and Document Manager, Mr Pinkerton acknowledges that notwithstanding his increased profitability, he is still only scratching the surface of the capabilities of the software. “I want us to double our turnover in the next couple of years and I firmly believe that Practice Manager and Document Manager will allow us to do that. Together, they have exceeded our expectations.

“ The system costs a pittance and is worth tens of thousands of dollars a year to Pinkerton Accountants. ”