



CUSTOMER PROFILE

From tiny beginnings in the 1990s, Indigo Tax & Accountancy now has a 14-strong team serving clients who predominantly work in the performing arts and creative industries. The practice is based in rural West Sussex.

BUSINESS CHALLENGE

To increase practice efficiency, while enabling clients out on location to manage their business using digital tools.

SOLUTIONS USED

IRIS Accountancy Suite
KashFlow
IRIS Snap

AVAILABLE ANYWHERE

Indigo clients can upload receipts, invoices and other business records anywhere in the world

COLLABORATION

The Indigo team can keep clients on track by spotting any anomalies in submitted business records

TIME SAVING

Practice time previously spent on entering client data is freed for higher value activities

PAPERLESS

Electronic transactions can be photographed and uploaded, eliminating the need to retain paper records

Embracing the digital revolution

IRIS has been part of the Indigo success story from the start. Over the years, Managing Director Teresa Noon has added IRIS software for company administration, payroll and practice management to the core tax and accounts suite. More recently, the practice has adopted online tools that strengthen collaboration with clients and make collecting compliance data easier.

Teresa says, *"We have really embraced the digital revolution. Making Tax Digital was obviously a key driver initially but, irrespective of the delay to implementation, we've pressed on as we feel it's the right way to go. We currently have nearly 160 clients on KashFlow online bookkeeping software from IRIS and all new clients are set up on it as standard as they come on board. Our goal is to have every Indigo client using KashFlow by the end of the year."*

Teresa explains, *"Collaborating on line has always suited our practice. We've been a 'digital first' practice from day one: the Indigo team mainly work from home, while our clients include musicians, bands, camera operators and producers who could be working on location anywhere in the world."*

Teresa reports that clients are very happy to adopt this way of working: *"It's especially popular with 30-somethings, as they run their lives on their phone or tablet. From a marketing perspective, working digitally has helped us to 'sell' our practice and we're bringing new clients on board all the time."*

Putting IRIS Snap through its paces

Indigo has recently started to use IRIS Snap, an app-led service from IRIS that complements KashFlow online bookkeeping software by extracting information from the receipts, invoices, purchase orders and bank statements that clients accumulate in the course of business.

Teresa says, *"All the client ever has to do is take a photo, press a button on their screen and it's sent to the IRIS Snap team. The client doesn't have to understand the ins and outs of entering their data correctly. In the case of a receipt, items from the same receipt are coded into the appropriate categories, differentiating between stationery and a sandwich, for example. If the client is VAT registered, that is broken out, too."*

Teresa highlights, *"IRIS Snap is great for anyone out on the road, as Indigo clients often are. Whereas they used to keep losing their receipts and would struggle to remember the details of an expense a month down the line, IRIS Snap now encourages them to keep up to date as they go. We have sight of the original receipt and can spot any anomalies. What's more, with a steady flow of transactional data coming in, we can generate meaningful, accurate management reports. As a result, all parties feel much more in control."*



Teresa points out that IRIS Snap also works with electronic receipts, reflecting the growing trend for high-street retailers and service companies to email invoices and receipts, rather than printing out a hard-copy version: *“The client simply calls them up on screen, takes a photo and presses the upload button. This supports the capture of online purchases, phone bills and so on. It saves paper and so it’s better for the environment, too.”*

At the other end of the technology spectrum, IRIS Snap recognises handwritten receipts: *“When we first trialled the IRIS Snap service, we uploaded a photo of a really scruffy, handwritten invoice, and it still worked!”*

Built for the accountant

It’s important to note that unlike some apps on the market, IRIS Snap is designed with the accountant in mind. Teresa says, *“IRIS Snap comes up with a dashboard, so we can see a receipt and what it’s been coded to. We review it from time to time and push the information through to accounts.”*

There’s another advantage: *“If a client hasn’t as yet adopted IRIS Snap and drops off the classic carrier-bag of receipts, we can ‘snap’ them into the system ourselves. We still need to do some low-end data checking, but time that previously would have gone into data entry is released for adding value to the client’s business.”*

Looking forward, Teresa says, *“With the technology now available to capture data in line with accounting standards, the basic accounts fall out at the end, rather than accountants like us having to manually enter the client’s data at the end of the year. I think services like IRIS Snap are going to change the way that practices deploy their resources as a consequence.”*