

Success Story

Sage Accounting helps Atlas Bookkeeping get on the map

Thanks to Sage, this one-woman bookkeeper modernised and moved to the cloud for real-time access to client data



Jane Turley founded Atlas Bookkeeping in 2018. Having been a bookkeeper for more than 15 years, Jane has a solid base of around 20 clients in a diverse set of industries, including a science institution, building firm and caravan storage company.

Many of the clients have been with Jane from Atlas Bookkeeping for well over a decade, using a range of services from VAT to payroll and bookkeeping.

Key outcomes

- Increased efficiency and service levels with real-time access to client data from anywhere
- Saved clients more than 15 hours per month on raising invoices
- Reduced own invoicing time down from one hour to just 5 minutes per month
- Modernised the practice and client base by moving to the cloud

Company
Atlas Bookkeeping

Location
United Kingdom

Industry
Accounting & Bookkeeping

Sage Products
Sage Accounting



About Atlas Bookkeeping

Atlas Bookkeeping was founded in 2018 by bookkeeper Jane Turley. Jane has a solid base of around 20 clients in a diverse set of industries, including a science institution, building firm and caravan storage company.

Sage



Desktop dilemma

As a long-term user of Sage, Jane had happily managed most of her clients from her desktop with Sage 50 Accounts. When Sage introduced their cloud technology, Sage Accounting, several years ago, like many she wasn't ready for the change and believed her clients weren't either. However, as a one-woman operation, Jane spends most of her time out at client sites, and it was becoming a challenge dealing with queries and delivering the excellent service she has a reputation for.

“When I was out at one client, I'd have another one call me and ask me something. With no access to the information, I'd have to wait until I got back to the office to change it or look it up. My brain was clogged with all these constant requests for things I'd have to do once I got back to the office,” Jane explains.

That's when Jane began to look again at Sage Accounting. Although she could see value in the cloud-based software she was still sceptical about moving her clients over, with concerns about finding the time to learn new processes and a new product. “I'm a big believer in ‘if it's not broken don't fix it’, and I love Sage 50. I felt like moving to the cloud would be a massive chore,” she says. But she also knew that something had to change and with Sage's support, she decided to make the switch. “Now that I've done it, I can't believe how smooth and straightforward Sage Accounting is, and how much more I can achieve with it,” she says, laughing.

Fully supported migration

Jane worked closely with Mick Murray, Sage Enablement Specialist, who showed her how Sage Accounting could transform her business, and helped her work through the migration stages. “Sage made the whole migration process hassle-free and having the relationship with Mick made a huge difference because I had someone there who understood my business,” Jane says.

In the first stage, Plan, Mick and Jane decided on the timescales that would work for the migration for both Jane and her clients, ensuring training and support were in place at the right level for Jane. Phase two, Prepare, saw Mick deliver training to Jane, so she knew exactly what was happening and felt reassured that her data was safe, secure and fully backed up.

With training complete and Jane feeling more confident, the migration team moved the data from Sage 50 into Sage Accounting, in the Migrate stage of the process. Jane is now in the Monitor phase, being regularly contacted by Mick to ensure she is getting everything she needs from the technology. Jane knew she could always go back to Sage 50 if she didn't get on with the cloud technology, but, she says “Once I got the first lot of bookkeeping done with Sage Accounting, I was sold. It's just so easy and efficient, and it's already changed my business.”



The Sage team supported Atlas throughout the entire process of migrating to Sage Accounting.

User-friendly and intuitive

Jane has already migrated most of her clients over to Sage Accounting and trained them, with some clients also having their own licenses. Even, she says, the ones she thought would be resistant have switched to Sage Accounting and love it.

“It’s designed to be just like an app, so it already feels familiar. There’s just no fuff, it’s intuitive and it works,” Jane says. “One client who I thought might struggle because she always asked me lots of questions previously, has just got on with it – she can do it all herself. My phone doesn’t ring with technical queries or things she’d accidentally do that I would have to tidy up,” she adds.

Access anytime, anywhere

With fewer calls to deal with, Jane can focus on the other needs of her clients, such as in-depth reviews of their P&Ls to improve financial management. Sage Accounting has been instrumental in helping her enhance her clients’ experience, she says.

Regardless of whether she is out in the countryside with her caravan storage client, or at the builder’s yard, Jane can access all her clients’ information with just her laptop and Sage Accounting.

“I had a client yesterday who asked me to give her new office manager access to Sage, and I was sat in a field at the time! I had internet access and I had my laptop with me, and it was done in 10 minutes, whereas previously I’d have had to say I’d do it when I got back to the office, three or four hours, or even a day later,” explains Jane.

Not only that, Jane says, but she’s free from having a constant to-do list in her head of all these small tasks, helping her feel less stressed.

Time-saving automation

As well as enjoying improving service levels, Atlas Bookkeeping and their clients have also been taking advantage of working more efficiently with Sage Accounting.

For example, Jane says, when it comes to doing her own bookkeeping, instead of having to save sales invoices as PDFs and then emailing them to her clients as she did previously, she just saves them and emails them directly from within Sage Accounting. “It’s gone from taking me over an hour to do them all, to five minutes,” she adds.

And it’s a similar story with her building client, she says. The firm used to raise around 300 invoices in Excel, and then someone would manually input that information into Sage. Now, the company just does everything through Sage Accounting. “Not having to do this repetitive task saves the company about 15 hours per month, as well as the cost of having to pay someone to input all this data each time,” Jane says.



“It scares me to think I could have stayed where I was a year ago and never known how much easier Sage Accounting would make my life.”

Jane Turley

Founder, Atlas Bookkeeping

Modern and inspiring

Atlas Bookkeeping has put its own cost savings from Sage Accounting to good use, according to Jane. By charging her clients monthly for access, she’s offsetting her costs and spending the money updating other areas of her business, such as her secure data transfer portal.

Jane says it’s her move to the cloud with Sage Accounting that has inspired her to do this and reignited her enthusiasm for her job.

“Sage has modernised me. I was in danger of getting set in my ways, but having Sage Accounting has made me love what I do again. It scares me to think I could have stayed where I was a year ago and never known how much easier Sage Accounting would make my life,” concludes Jane.



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