vcita

Accounting firm expands business by 50% using vcita's all-in-one platform

Accounting and taxes are embedded in the Perkins' genes. Ashley Perkins' brother and father are both accountants, so it was no surprise when Ashley gravitated in that direction as well. But rather than working for her family's business, her entrepreneurial spirit led her to open **Perkins' Tax & Accounting Solutions**, a financial management firm offering a full suite of accounting solutions from business plan preparation and bookkeeping to payroll processing, auditing, budgeting, forecasting, and accounting advisory.

> *As accountants and tax professionals, we are very busy and try not to babysit our clients. We, therefore, need a lot of automated options and client profiles all in one place.*

CHALLENGE

So many tools, yet so much inefficiency

Ashley Perkins used multiple tools and apps to run her business before she discovered vcita. But constantly found herself switching back and forth between the different tools. It was ineffective for customer management, and it was also costly. Perkins also had a difficult time keeping track of invoices and payments as well as client bookings. In addition, because security is critical in the tax and accounting industry, Perkins previously used another system to send and retrieve important documents in a secure manner. However, it wasn't user-friendly and her clients were not comfortable with it.

vcita's all-in-one business management system

Once she integrated vcita, Ashley no longer needed her other apps and tools. vcita's platform included all these services in one place.

Payments

Some of Perkins' clients pay when they book online through the app, while others are invoiced before the booking, it all depends on the service they require. vcita's flexible payment platform enables Perkins to build and manage her entire payment process with ease from one platform. With vcita, Ashley also finds it easier to keep track of her finances and gain more financial transparency.

vcita's mobile app

Ashley wanted to empower her clients to act independently and become more proactive. With vcita's client portal, her client can securely log in to view their invoices, place payments, and upload documents directly from their mobile phone. It's like having her very own mobile app!

Secure document sharing

Both Perkins and her clients use vcita to securely upload their documents. The files securely enter the system and can be retrieved easily by both Perkins and her clients from any device.

Customer management

Ashly now manages much of her **client communication** using vcita's inbox. She can view the continuous communication between herself and her client, including their booking record, payment history, and shared files.

RESULTS

vcita saves time and money

Perkins can now spend more time with clients than on administrative tasks. Because so much is now automated, she is also saving money on administrative staff.

With one central platform for all her business needs, she has more transparency and order in her business processes.

"Since using vcita, my business has expanded by 50%!"

Once she implemented vcita, Perkins canceled many of the tools and apps she was using and incorporated all her previous processes within the vcita app. With a significantly reduced tech stack, her business is much easier and less costly to manage.

Ashley Perkins is so thrilled with vcita, she convinced most of her networking contacts to implement it as well.