



Case study

## CCH Central Suite

### Moore Stephens

Moore Stephens is the UK's eleventh largest independent accounting and consulting network with over 1,400 partners and staff in 33 locations. Caroline Wellsted is responsible for IT services in a group of five Moore Stephens offices in the south of England (Salisbury, Southampton, Chichester and the Isle of Wight) plus Guildford. Here, she talks about the advantages of using an integrated software suite from Wolters Kluwer.

#### What Wolters Kluwer software do you use in your group?

Integrated under CCH Central we have CCH Accounts Production and CCH Personal Tax together with CCH Practice Management and CCH Document Management. We have just installed the CCH Portal and will be upgrading from CorTAX to the newly integrated CCH Corporation Tax as soon as we can. Nationally, we run the CCH audit program, CCH Audit Automation.

#### Could you tell us a bit about CCH Central?

First of all, CCH Central is a central database holding all of our client and contact details, but it's much more than that; it's also an interface to all the individual programs in the CCH Central suite, so there's a consistent front end to everything.

*“CCH Central is a central database holding all of our client and contact details, but it's much more than that; it's also an interface to all the individual CCH programs, so there's a consistent front end to everything.”*

The Central 'home pages' display information from the different applications together on a single screen. In theory everyone can personalise their own home pages exactly as they want but we prefer to set up standard home pages for different roles and then lock these down. So, on a partner's screen we'll include a list of bills that need approval whereas everyone might see timesheet information, including non-chargeable summaries so they can track leave taken and remaining.

Having Central means that the latest information is always to hand and always visible.

#### What would you say are the benefits of having a single, integrated suite of software from Wolters Kluwer?

I'd say that the single biggest benefit is efficiency. You have names, addresses and contact details, all held in a single, central location and available across the entire suite of applications. You only have to update data in one place and once you've done that it's correct for everyone, everywhere.



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Integration doesn't just make it easier to enter data; it also makes it easier to use it. When information is held in separate applications you often have to swap between them to find out everything you need about a single client, but with CCH Central everything is in one place and it's easy to access.

A single database also makes reporting easier. With an integrated reporting tool we can open up the entire suite to mine and report on data, for example to identify clients who would really benefit from particular services so we can target them specifically, rather than sending out generic newsletters to a wider group. Because we keep contact details up to date for sending out tax returns or final accounts, we're also automatically keeping our marketing data up to date at no extra cost.

At Moore Stephens we have our own development programme for extending the CCH Central suite using the APIs that are available. So, for example, we've built additional functionality into the billing system to match our business rules and internal processes. For firms like ours it's useful to have this kind of flexibility so that you can extend functionality without affecting the basic program.

**And what about the benefits of connectivity?**

As well as integration across the whole suite, there is also connectivity between individual applications. So, for example, there's the connectivity between CCH Accounts Production and CCH Personal Tax for business profits, and when a tax return is filed online with HMRC a copy is automatically saved in CCH Document Management for that client, so you can tell at a glance that it's been done. That kind of thing is only possible when all the software comes from a

single supplier and it definitely makes for a more efficient operation.

**How does CCH Document Management fit into the integrated suite?**

We're really only at the beginning of the Document Management project, gradually moving clients across from the predecessor Wolters Kluwer product, Singleview.

We started with all our admin and non-client data such as timesheet controls, bank entry, internal financial and IT data – all the stuff that's essential to the smooth running of the practice; we're now starting to load up the client data. We're also looking at using CCH Document Management to store personal information for each employee, such as softcopy payslips, that they will be able to access securely.

Because CCH Document Management integrates with CCH Central, it can use the information that's already in there which makes it easy, for example, to file emails against clients.

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CCH Document Management is a much better solution than having open network folders which can be moved or deleted by accident. You can send links to other members of the team which will take them directly to a document stored in the database, knowing it will still be there when they need to access it.

CCH Document Management is very flexible, so we can tailor it to our precise requirements and set it up to reflect exactly how the Group operates.

### What are your future plans for the CCH Central suite?

We're very interested in the CCH Portal that's just been launched.

For us, there are two big issues surrounding client communication: firstly we want to reduce the amount of paper that's in circulation but, at the same time, we need to make sure that we maintain the security of client information.

With new legislation expected on the use of email for sending personal data, CCH Portal seems like an ideal way to address both these issues. And because CCH Portal is integrated into the rest of the CCH Central suite it means keeping everything together in one place, which is obviously more efficient.

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