

A portal is a clients business!

By Joss Milner CA

Since Luca Pacioli invented double entry bookkeeping in 1494 accountancy did not change much for almost 500 years. The staggering advancements in technology over the last 25 years have seen massive changes in the way we work. One of the most significant changes has been the way we communicate with our clients.

Today email is our primary method of communication. The average accountant will receive over 1,000 emails a week. That is over 100,000 emails sent and received per year.

Ask yourself the following questions:

- Is outlook your filing cabinet?
- Do you know if your clients are reading important communications from you?
- How many times a year do you get asked to resend things you have already sent clients?
- How often is someone in your office waiting for something that a client has already sent?
- Are you in control of your communications with clients?

Many of our clients are adopting new technology, meaning there is an expectation for their accountant to keep up. Did you ever stop to think about the ordeal your client is going to have to undergo when they email us a 50mb MYOB file? A business in Melbourne had 22 failed attempts to email a very large MYOB file to their accountant last year before giving up and burning a CD and couriering it. This is why so many firms are adopting Client Portals in their practices.

So what is a Client Portal and why are they so popular?

The oxford dictionary defines a portal as a doorway, gate or other entrance. This literal definition gives us a great understanding of what a client portal is - a gateway of communication between your firm and your clients. Accessed directly through your website, your clients can simply & securely upload and download confidential information at their convenience 24/7 from anywhere in the world. The files are stored on a secure server which means you need no hardware and no technical knowledge, it is all taken care of.

How can the Secure Returns client portal benefit my accounting firm?

Offer your clients the best possible experience in sending or receiving files. Keep your clients informed by using Secure Returns to bring them to your website. Establish control over your clients' and staff's activity through extensive reporting.

"We find the clients really love the Secure Returns process so they can download documents at their leisure and an added bonus is they access our website every time they do this." Evan Bulmer - Evan Bulmer & Associates.

"Very user friendly and is quick and easy to upload files" – Cherie a client
For a very low monthly charge you and your clients can have unlimited upload & download capabilities.

For further information about Secure Returns Contact Joss Milner on 0417 892 088 or email him on joss@securereturns.com.au