

SUCCESS STORY
Clicktools



As a cloud software company, one of our core values is “Living in the Cloud.” It’s therefore vital that we are seen and perceived to be practicing what we preach, but having a cloud-based accounting package actually also made sense from a practical perspective.

Mary Flynn
Accounting Technician, Clicktools

Clicktools

Clicktools is the leading provider of premium, Cloud-based survey software for businesses. They live by the brand promise to help their customers better understand and serve their customers. And as a cloud-software company, they want to build and grow their an infrastructure in the same fashion by “Living in the cloud.”

Their previous system – Sage – was unable to keep up with company growth and couldn’t support the global nature of their business. FinancialForce Accounting was an easy choice accommodating their most diverse and complex financial needs while bringing dramatic time savings and efficiency across every facet of finance. And having a view of the same single customer record for sales, marketing, support and finance keeps everyone on the same page about customer activity and any question can be answered.

Featured Product

FinancialForce Accounting

Systems Replaced

Sage

Company Size

Small

Industry

Software/SaaS/Web Development

Location

Global

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Business Issues

- Manual re-keying of customer and billing data into multiple systems – caused errors and proved very inefficient
- Invoices were created in the old system and then manually converted into other currencies using a spreadsheet – which was very time consuming as 60% of business required conversions
- Use of non-cloud based system Sage went against core value of the business, to be cloud based
- Sage system was unable to keep up with company growth and diversification of locations
- Prior system also has inability to add sales tax to invoices

Benefits & Results

- FinancialForce Accounting can support offices in multiple locations without having to maintain IT infrastructure
- Single point of data entry has eliminated mistakes due to human error and manual steps have been removed from billing process
- View of a same single customer record for sales, marketing, support and finance data keeps everyone on the same page about customer activity and customer queries can be dealt with more effectively
- Reduced billing cycle by 2-3 days a month due to ease of reporting in FinancialForce Accounting and Salesforce
- Month end flurry of invoices is easier to process in time to support sales teams
- Dramatic time savings with automated invoicing and currency conversion; teams can focus on cost saving activities instead of tedious tasks
- Invoices can be issued from the UK office as a US business with sales tax included or in multiple currencies
- Billing can be performed out of both the US and the UK, as FinancialForce Accounting can set as many different tax rates as needed to comply with local laws in each country
- Can now report on all aspects of finances in local or dual currencies which in turn means they can present data to accounting authorities in both the US and UK in the format needed to comply with their respective requirements
- Business critical data and analytics are easily extracted and converted to a format which can be used elsewhere in the business or be sent outside the company

“ We now have an accounting professional in both our Phoenix and Poole offices, as well as an FD who often works from home. Having cloud accounting software means eliminating any difficulties caused by using incompatible locally-based software.

Mary Flynn | Accounting Technician