

Success Story

Accountant's Malta dream made possible by Sage Accounting

SJW Accountancy successfully manages UK clients from Malta with the help of Sage software



SJW Accountancy is a small accountancy practice run from Malta but with an established and loyal UK client base.

Owned and run by Sue Wright, SJW Accountancy offers a full package of services to small businesses and sole traders, ranging from bookkeeping, final accounts, and tax and VAT returns, to self-assessment and payroll.

Originally founded in 2013 in Wiltshire, South West England, Sue decided to relocate to Malta in 2017. With the support of the right technology, she has been able to continue working with her UK clients from the warmer climates.

Key outcomes

- A day's saving every quarter using AutoEntry to do client VAT returns
- Ability to review accounts in real-time from Malta with clients in UK
- 60% faster to do final accounts due to reduction in manual inputting of bank entries
- A day quicker to do corporation tax and accounts thanks to the automated tagging process

Sage

Company
SJW Accountancy

Location
Malta

Industry
Accountants & Bookkeeping

Sage Products
Sage Accounting, AutoEntry

SJW

About SJW Accountancy

Owned and run by Sue Wright, SJW Accountancy is a small accountancy practice run from Malta but with an established and loyal UK client base.



Better work life balance

With over 25 years' experience in accounting, Sue had transitioned into teaching finance and accounts, becoming an AAT lecturer for both adults and 16–19-year-olds. Deciding she wanted a better work-life balance, Sue gave up teaching in 2013 to go self-employed, and SJW Accountancy was born. Having always been a Sage advocate, Sue naturally chose Sage 50 as her desktop accounting software of choice as she embarked on her solo accounting venture. Around the same time, Sage had ventured into the world of cloud computing with the launch of Sage Accounting.

“My Sage Practice Success Manager phoned to tell me about their new cloud offering; I had seen competitors' solutions and didn't like them, so I was very interested to see what Sage had developed. She came down to Wiltshire to give me a demo, and I could instantly see the potential of the Sage cloud software,” recalls Sue.

Both the price and functionality impressed Sue, as well as the ease of use, so following some free training with Sage's product experts, SJW Accountancy made the switch from Sage desktop to Sage cloud. “The support from Sage was second to none; there was always someone available to support me, which, when you've just started out on your own, and you're trying a brand new type of software, is invaluable,” says Sue.

Evolution of cloud accounting

As an early adopter of Sage Accounting, Sue became involved with the development of the software. “I was part of a customer panel and would be asked for my feedback on new features and add-ons that Sage were working on and that I'd also like to see as a user,” explains Sue. “It was really interesting and gave me insight into what was coming, and it was great to know that Sage was listening to what its users wanted.”

Gradually, additional tools and more functionality was added, and Sue says it was great timing as the Sage software was evolving at the same time as her own business. “I had grown my client base to a point where I had to employ someone to help me, so to have this cloud-based software that allowed you to do most of your bookkeeping and final accounts processes all in one place was a breath of fresh air,” says Sue.

Making the dream possible

Today, the software features the full range of accounting services, and Sue says she couldn't have made the move to Malta without it.

“Without a doubt, I could not have carried on working with my UK clients from Malta without Sage Accounting. It enables me to do their final accounts, corporation tax, payroll, bookkeeping, self-assessments, and VAT returns easily and seamlessly,” says Sue.

Back to working solely by herself, Sue has nine limited companies and five sole traders on her books, and conducts around 28 self-assessments a year. “They're all UK clients—mostly small businesses with just one or two directors and a few sole traders. I've retained the clients I wanted to when I relocated – some did fall away, but that was my own choosing,” laughs Sue.



Being cloud-based, Sage Accounting has enabled Sue to successfully relocate to Malta and carry on working with her UK clients.

Real-time accounting

The beauty of Sage Accounting being cloud-based is that both Sue and her clients can access the same information from their different locations and know that data is accurate and up to date.

“I can send an invite directly from Sage Accounting to a client so they can access the software and see exactly what I am seeing. It allows us to have a phone call and discuss their accounts, and there is no issue with me being based out here,” says Sue.

Another benefit of the cloud software versus the legacy desktop software is that it has made doing final accounts and corporation tax a lot less complicated.

“When I was using desktop software, you’d have to do your accounts, and then to do the corporation tax return and submissions, you’d have to tag everything. I never quite understood the tagging, but it was very longwinded and painful. If you got it wrong, it wouldn’t allow you to submit the returns to HMRC,” says Sue.

She estimates at least a day’s saving using Sage Accounting. “I can get a set of accounts and corporation tax all done in a day, as I don’t have to tag it, submit it to Companies House, and then find separate software to do the corporation tax return. It used to take two to three days.”

AutoEntry

The biggest game-changer has been the addition of automated data entry for receipts, invoices, and bank statements via AutoEntry.

“I’d heard of AutoEntry and when my Sage Practice Success Manager described what it could do, I was sold. Anything that makes life easier for myself and my clients is a no-brainer,” says Sue.

Prior to implementing AutoEntry, Sue’s clients would provide envelopes of receipts that Sue would have to manually input before she could do their bookkeeping and accounts. In fact, one client would actually send a huge box of paperwork every quarter from the UK for Sue to do the VAT return.

“It was so time consuming; I used to have to get my husband to help me sort out all the receipts as they were not in order. Now, the client simply emails me PDF documents of her invoices, I upload them into AutoEntry, and they go straight into Sage Accounting. It saves me a day and a quarter at least—just on this one client,” says Sue.

Another client would send Sue his whole year’s worth of bank statements with around 400 separate entries—all of which Sue used to have to manually input. Using AutoEntry, she can now upload the bank statements, and AutoEntry seamlessly transfers the data into Sage Accounting.

“This is easily 60% quicker than me tapping away at the keys, manually inputting all of the bank entries. Now it’s just a few clicks and done,” says Sue.



“It just works. It’s always consistent, and you know what you’re getting with Sage – a trusted, reputable brand with support staff that want to help you.”

Sue Wright

Business Owner, SJW Accountancy

Embracing the technology

Some of SJW Accountancy’s clients use Sage Accounting and AutoEntry themselves, which makes life even easier for Sue. Encouraging two mechanics to download the AutoEntry mobile app was a smart move for both Sue and them.

“They run a garage and now take photos of their receipts, and the AutoEntry app captures everything and sends it to me. I wasn’t sure how they’d feel about using the technology, but they absolutely love it,” says Sue. Another client uses Sage Accounting and AutoEntry to invoice his own clients, so he’ll upload all of his own supplier invoices and bank statements for Sue. “All I have to do is make sure they are okay and do the VAT return; I literally email him to say, ‘This is what it is, is it okay to file?’ Previously, he’d send me an envelope of invoices which was time consuming and costly for him too,” says Sue.

Sue says she’d highly recommend Sage Accounting to other small accountants because “It never lets you down and the support is amazing. It just works. It’s always consistent, and you know what you’re getting with Sage – a trusted, reputable brand with support staff that want to help you.” Sue explains that the Sage software has made her relocation to Malta a breeze. “Without Sage Accounting, it would have been tricky to carry on servicing my UK clients from Malta—I probably would have called it a day. Essentially, it’s the perfect solution and makes my life a lot easier.”



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