

How CAS 360 turned 2 days work into 30 minutes.



About Upshot

Established in 2011 by Jill Fryer, Upshot is an accounting firm with a current team of six, helping small and medium sized businesses reach their business goals and dreams.

Based in Tauranga, New Zealand, Upshot provides total accounting and business solution packages to approximately 500 clients. Jill - Upshot Director - is a satisfied CAS 360 user who wanted to share the key benefits CAS 360 brought to her firm and her experience with us.



The Challenge

Reduced productivity due to the lack of integration and automations offered by previous provider.

Upshot is a remote cloud-based business that uses quite a number of apps, requiring a great level of integration to work efficiently and productively. Before using CAS 360, Jill and her team were spending a significant amount of time manually updating data, sending documents to clients by email, getting information from the Companies Office, waiting for clients to send it all back etc. Only then to go through the process



of reviewing documentation to upload and get things done correctly to meet compliance.

Although Upshot has been cloud-based since its establishment, the software solution the Firm was using before (CCH Entities) was not offering the level of integration and automation needed to improve business efficiency and team productivity.

“The previous software we were using wasn’t working right, I wasn’t happy with it. Trying to get around it was a nightmare for us, quite frankly. Very hard to find documentation, get things sorted, updated, and run the reports. The whole process was very long-winded and there was no easy system to notify when documents had been returned or were overdue.”

Jill Fryer, Director at Upshot

“Since we’ve implemented CAS 360, completing the Annual Returns is much easier. The time frame has dropped from a couple of days to half an hour to get things done.”

Why CAS 360

Easy to use cloud-based solution with time-saving features

“We wanted software that was easy to use and that held all the documentation. So if we had to go back and have a look at who signed off any changes for the company, we would be able to see it in one place, without having to go far back through our systems to try and find things.”

“CAS 360 is way more efficient than our previous provider. It gives us a list of Annual Return dates, documents due, and deadlines. We hit a button and get a report, simple like that. We can easily decide which paperwork to send off to clients and which forms need to get signed - it’s all there in one place. That’s the beauty of it.”



AML/CDD:

Manage your AML/CDD requirements for all of your clients’ Companies and Trusts with automated alerts. This alert will notify you of your AML/ CDD status for a Company. CAS 360 Users are able to record their AML/ CDD requirements and run verification checks on the Company Contacts (Directors/ Shareholders).

CAS 360's user-friendly interface and excellent customer service also played an important role in Jill's decision. "The software is extremely easy to use, it takes just a couple of times using it to learn, which is great! The client experience was also an improvement over what we previously had, now clients see us as being more professional."

"Furthermore, the BGL customer service and support team are outstanding and reliable. We always got responses for any enquiries, really, really quickly, and that means so much. I prefer to work with somebody you can talk to rather than a machine, even though everything's on the Cloud. It's nice to have that interaction so when you have a problem, you know who to talk to and get it fixed. And the BGL team has always been very friendly and helpful."

The Solution

An efficient, automated and easy to use Company, Trust & AML management software

When using another provider, Upshot had to deal with unnecessary document reviews and processes due to the lack of integrations and automation, which added little value to their business. The solution was to move to an innovative, more efficient, automated and easy-to-use Company, Trust & AML management software - CAS 360.

"We look after a lot of Companies Office Annual Returns, therefore managing, processing and reviewing documents without a good level of automation and integration could take us 2 days of work. Taking that long to get things done and

meet compliance is not good for any business, we needed a better and more integrated software."

Although Upshot had the need for a better software, sometimes the idea of implementing a new system can be a difficult endeavor for many businesses, but it doesn't have to be stressful. With the support of the BGL team, the implementation process was done quickly and kindly.

"The implementation process was very easy, the BGL team was extremely helpful. Our sales rep, Jason Armishaw, has been in regular contact with us, following up during the whole implementation process, making it as smooth and easy as possible."

For Upshot, two of the biggest benefits of CAS 360, besides integration and being cloud-based, are notifications/

Integration with the Companies Office, Xero Practice Manager and Digital Signing solutions has enabled us to streamline our processes and provides a more holistic view of our companies.

Connected Apps:

Integrate CAS 360 with these great apps and enhance your workflow even further!



Xero Practice Manager



Adobe Sign

Adobe Sign



SuiteFiles

SuiteFiles (Coming Soon!)

reminders and the AML alerts. “I really like the notifications and reminders that are available in CAS 360 - ‘Oh, this one’s been signed, that one’s been signed’ makes it all very easy to use! The smart alerts are really time-saving, and the AML alerts notify us about the AML/CDD status for a company, so we can record their requirements and run verification checks on the company contacts. A great and unique functionality.”

CAS 360 Alerts are designed to replace all the manual processes firms use to manage Annual Returns, Document Deadlines and AML checks.

The Results

Increased productivity and more time to focus on other day-to-day activities.

“Since we’ve implemented CAS 360, completing the Annual Returns is much easier. The time frame has dropped from a couple of days to half an hour to get things done. Plus, I feel that we are more compliant because we don’t file things until we actually get that paperwork signed.”

The integrations available are another great competitive-advantage of CAS 360. Jill and her team now have access to everything in one place, by connecting and integrating directly with the Companies Office and industry-leading apps such as Xero, Adobe Sign, and SuiteFiles. “Total integration that works amazingly, and everything is in one place. That’s great!”

With CAS 360 and its fully customisable Document Templates, Jill and her team can now also have complete control to produce their own document suite, quickly and easily customising documents (in Word) and email templates (in plain text, rich text or HTML) with Upshot’s unique branding style. “Because of our customised documentation, now our clients see us and our documents as being more professional.”

Apart from all the great features CAS 360 has to ease the administrative burden, it’s really easy to implement and,

most importantly, to use. “Ease of use, documentation all in one place, time-saving. It all goes there. CAS 360 is a great, complete and integrated, addition to our tech stack!”



Want to know more about  CAS360 ?

[Book a call with our team!](#)