# Keyhouse

Your practice partners.

# Document & Task Management for accountancy firms.

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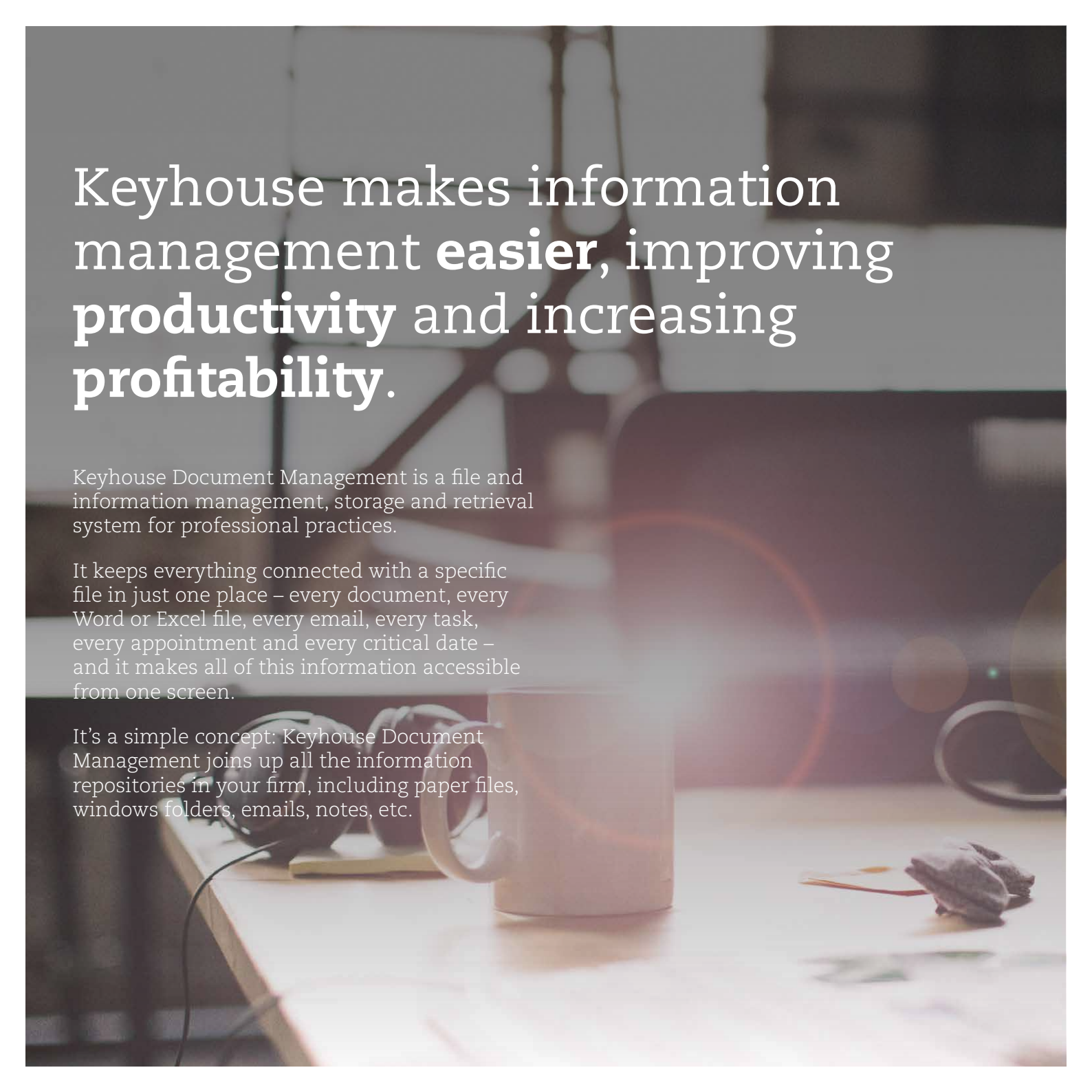
## Suddenly your numbers look a lot better.

Your time is a valuable and limited resource: Keyhouse will help you to find any information, fact, figure, form or document **in seconds**.

You'll save **hours every week**, **days every month**, **weeks every year**.

Think about all of that **time**.
Think about that **efficiency**.
Think about that **profitability**.

Professionals spend up to **50% of their time** searching for information and take an average of **18 minutes** to locate each document.

**Source: Gartner**

# Keyhouse makes information management **easier**, improving **productivity** and increasing **profitability**.

Keyhouse Document Management is a file and information management, storage and retrieval system for professional practices.

It keeps everything connected with a specific file in just one place – every document, every Word or Excel file, every email, every task, every appointment and every critical date – and it makes all of this information accessible from one screen.

It's a simple concept: Keyhouse Document Management joins up all the information repositories in your firm, including paper files, windows folders, emails, notes, etc.

# How Keyhouse applies all of our **practice management expertise** to your firm.

Keyhouse will show you exactly how our document management solution will improve the efficiency and profitability of your accountancy practice.

- We'll **install** it, with surprisingly little disruption

- We'll **integrate** it perfectly with your existing systems

- We'll **train** all of your people on it to make sure they get the maximum benefit from your investment

- We'll **support** it

One of the key benefits is that all emails are stored centrally on a file, visible to the entire firm and not just stored locally in Outlook on a user's PC and this gives everyone complete accessibility to all the correspondence on a file.

Keyhouse Document Management imposes a predefined client/file structure as well as an office standard for storing and managing client files. This means that there will be consistency in how files are set up and a uniform way of working – no more trying to figure out where someone stored a document.

With an improvement in efficiency comes enhanced client service which ultimately has a positive impact on your bottom line.

# We'll work with you, in **partnership**,

## to make your practice more **profitable** and to **grow**.

Keyhouse has been working in partnership with professional practices like yours since 1983 and we're proud of our reputation for successful system implementation and helping to get firms over the line.

We'll give you the best advice to make the smart changes that work, equipping you not with just the right technology but also providing the services and the business model to make life a whole lot easier. We'll help to transform your firm into a thriving, sustainable business by supporting the whole team, from senior partners to administrative staff.

Working hand-in-hand with you, in partnership, Keyhouse will tailor our document management system to your needs, the needs of your clients, the opportunities on your horizon and the character of your firm. That's how we make your firm more efficient and more profitable.

With a tailored solution, proper training and full support, we'll make it a success.

And then we'll make your firm a better business.

# Why **you** need to call **us** right now.

Since 1991 Keyhouse has been synonymous with state-of-the art practice management systems used mostly in the world of law firms. In this environment, where meticulous attention to detail, risk management and compliance are paramount, Keyhouse has excelled through outstanding quality and superior services.

By bringing everything we have learned in the paper-rich, labour-intensive legal market to the similarly disciplined accountancy world Keyhouse has a number of features that speak for themselves:

- A familiar and **easy-to-use interface** based on Microsoft Outlook

- **Full integration** with Microsoft Word, Excel and Outlook

- **Automatic document organisation** saving time spent searching for documents

- A **search engine** that finds text in documents and retrieves them instantly

- Built-in **document previewer** so that you can quickly review file documents

- Document **version control** with an **audit trail**

- The ability to work on files locally and then automatically **sync back to your network** so that files are always updated

- **Task schedule** and **to-do list** for each user provides failsafe reminders of critical tasks and dates

- **Task delegation** helps you to manage workloads and deadlines

- **Risk management** handles critical dates, money laundering, conflict search, file and peer reviews

- Flexible and customisable **workflow** module streamlines your firm's processes

- The ability to create your own **document templates** to reduce duplication and improve accuracy

# Keyhouse makes a **clear** and **immediate** difference.

Put the Keyhouse Document Management system to work in your accountancy firm today and it will make a big difference to how you work from day one:

- **Quick and easy** to install – a firm of 10 people can be up and running in one day

- A **short learning curve** thanks to a user-friendly interface that looks and feels like Outlook

- Built-in document/text search engine immediately **saves time, cost and effort**

- **Improved client service** because you can find the information the client needs in seconds

- **Better risk management** thanks to greater control and visibility

- Improved regulatory **compliance**

- Superior **disaster recovery**

- Reduced **storage** requirements

Keyhouse Document Management is a functionally rich system. While you certainly don't have to use everything all at once, here's what comes with your system:

## Time Recording

A superior time recording feature helps you to accurately track and monitor the value of your work against estimated fees and this is particularly important when quoting fixed fees.

## Billing

Produces draft bills quickly and easily with an easy to use billing wizard, whether you record time or not. If you don't, it's as simple as entering an amount for your costs. If you do, simply select which time entries you want to bill or entries to a particular value.

## Workflow

Keyhouse document management helps you streamline your business processes. The first step is to look at how the firm handles different areas of work. We will work with you to develop simple workflows to standardise and automate your work, manage key dates and reduce duplication and exposure to risk.

## Phone Log

A phone log that tracks incoming calls, notifying the account manager and linking each call to the relevant file.

# Here's what **other** accounting firms **love** about their Keyhouse systems.

1. The system looks and feels like Microsoft Office which reduces the fear of change and minimises disruption

2. It integrates seamlessly with Outlook and other Office applications so that you keep working with the applications you know

3. It has a predefined client/file structure so that everyone sets up files in the same way - you can see them all at a glance or generate a report on how may files you're working on for a client

4. You save so much time with easy document search and text retrieval for instant access to any file or information

5. Day-to-day tasks are a lot easier thanks to predefined and easily adaptable workflows and templates

6. Processes are streamlined with clear visibility and transparency

7. Efficiency, productivity and profits all go up without the need for more staff or offices

8. Risk management and compliance are improved

9. Fast, high quality support is there whenever it is needed

10. It makes the business more adaptable and future-proof

Keyhouse was founded in 1983 and has grown because we have built close working relationships with hundreds of specialist and full service professional firms. For decades we have been recognised as a trusted resource, supplying innovative software, professional advice and international best-practice insights that comes from a peerless hands-on understanding of what a practice needs.

Our core team of engineers, support staff and systems experts help us to design and add new innovations and features to what is the most comprehensive product range on the market.

Our clients range from local authorities, lending institutions and multi-partner firms with 250 plus users to smaller practices.

Yes, we develop, build and support specialised software but we also provide a complete, bespoke business model for professional services firms, helping our clients to work more efficiently, more effectively and more profitably.

What all of that proves is that the finest, most effective business model is Keyhouse.

# Hello.

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If you'd like to see the Keyhouse system in action, take a moment to visit us online and watch our short product videos.