

# Software Review



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## Scope of Review

I have used the Practice Ignition Software for about 2 years.

My experience in preparing proposals and onboarding clients in the past has been Word document-based proposals, contracts and letters of engagement. I often used to miss things and have different proposal layouts and different styles for each client which could lead to confusion when raising invoices once the client had signed up. My experience with the Practice Ignition has been an exceptionally positive one and has totally streamlined my client on boarding from initial proposal to raising the first invoice into Xero.

## Who is Practice Ignition and what does it do?

Practice Ignition was started in 2011 by Guy Pearson and the company has grown significantly since then. PI is an *'accounting automation solution designed to help accounting firms simplify and streamline the accounting workflows and other related processes of their clients, managing all aspects of an accounting practice leaving the practice to get on with growing their client base!'*

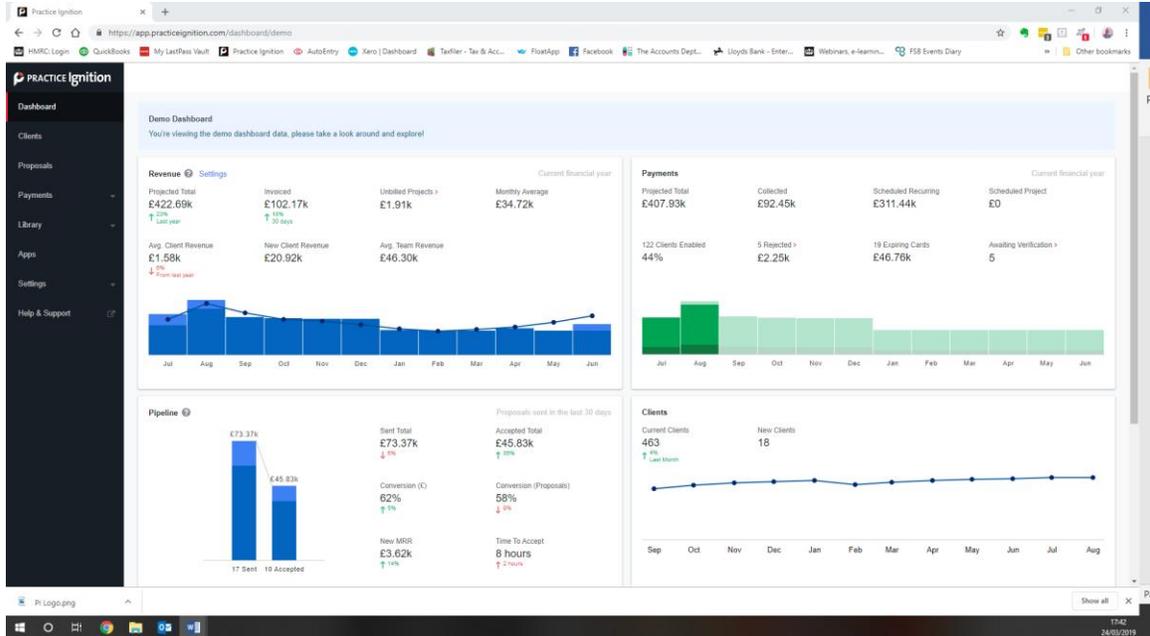
The software itself is cloud based so there is no need to download software on to your computer. Instead using a web browser, you can access the software from anywhere and I would recommend adding a bookmark or favourite to your internet browser that will take you straight to the login page.

For the purpose of this review I setup a new Test Client on a free 14 day trial version of the software. It is very straightforward to setup and add your first client.

However, I would certainly recommend spending some time getting the settings right before creating your first proposal - See ['System Requirement Setup'](#) later in the review.



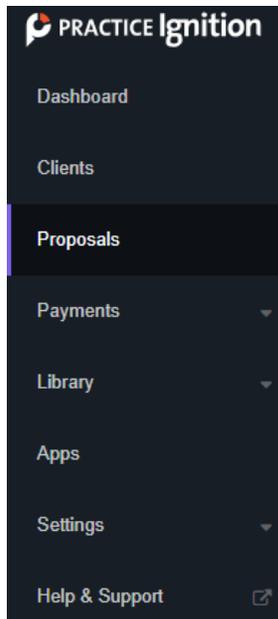
## How does it work?



*'Get unique data-driven performance insights for your business with our business intelligence dashboard. Monitor cash flow, forecast revenue and envision your success' Practice Ignition.*

This is the Dashboard view of the software, from here you can see four sections - Revenue; Payments; Pipeline; Clients.

Underneath the graph section there are some lists of Recent Proposals and their status and then on the right a list of Services with their figures for the current month and financial year. Giving you the opportunity to see at a glance which services are more popular than others.



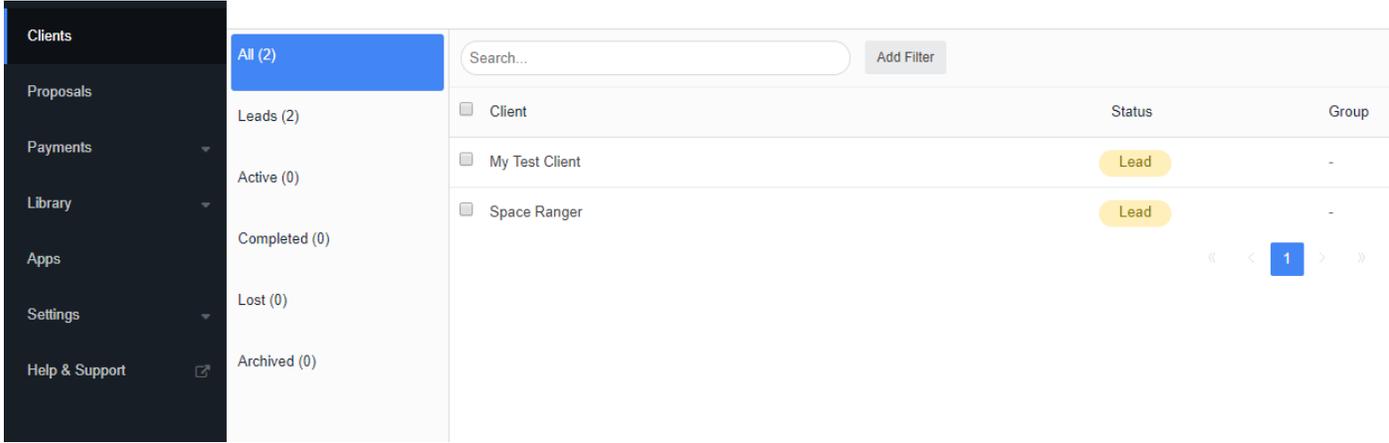
The menu structure down the side of the screen in the black bar allows you to navigate through the different areas.

Practice Ignition initially acts as a (Customer Relationship Management) CRM system and 'takes' client information - when adding a client, the record is created as a lead and will be marked as 'active' when they accept your proposal.

Only 'active' clients will be synced with your chosen Accounting Software. The Pipeline and graph on the dashboard show in graphic format the value and numbers within your pipeline.

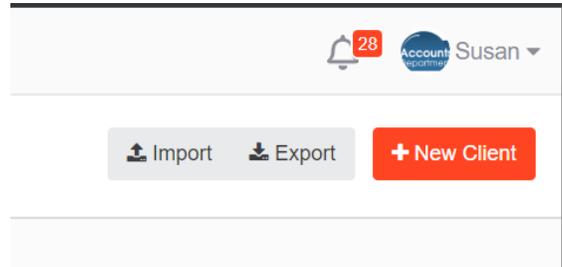
## Adding a Client

Shown below is a view of the Clients section; this can be broken down into various sections too, enabling you to look at Leads; Active Customers; Completed Customers and so on.

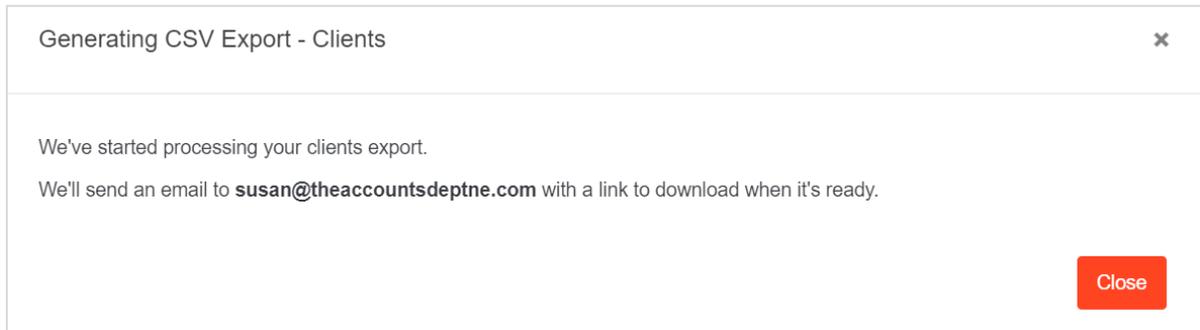


Once you've entered the basics of a potential client this is saved in to the database with a status of 'Lead'. You can then go ahead and Add a New Proposal for that client.

At this point it is also possible to Import your current client list. By clicking 'Import' the software then gives you the option to download a .csv template file. You can then complete this and upload your current database in to Practice Ignition.



It is also possible to Export your client data from Practice Ignition

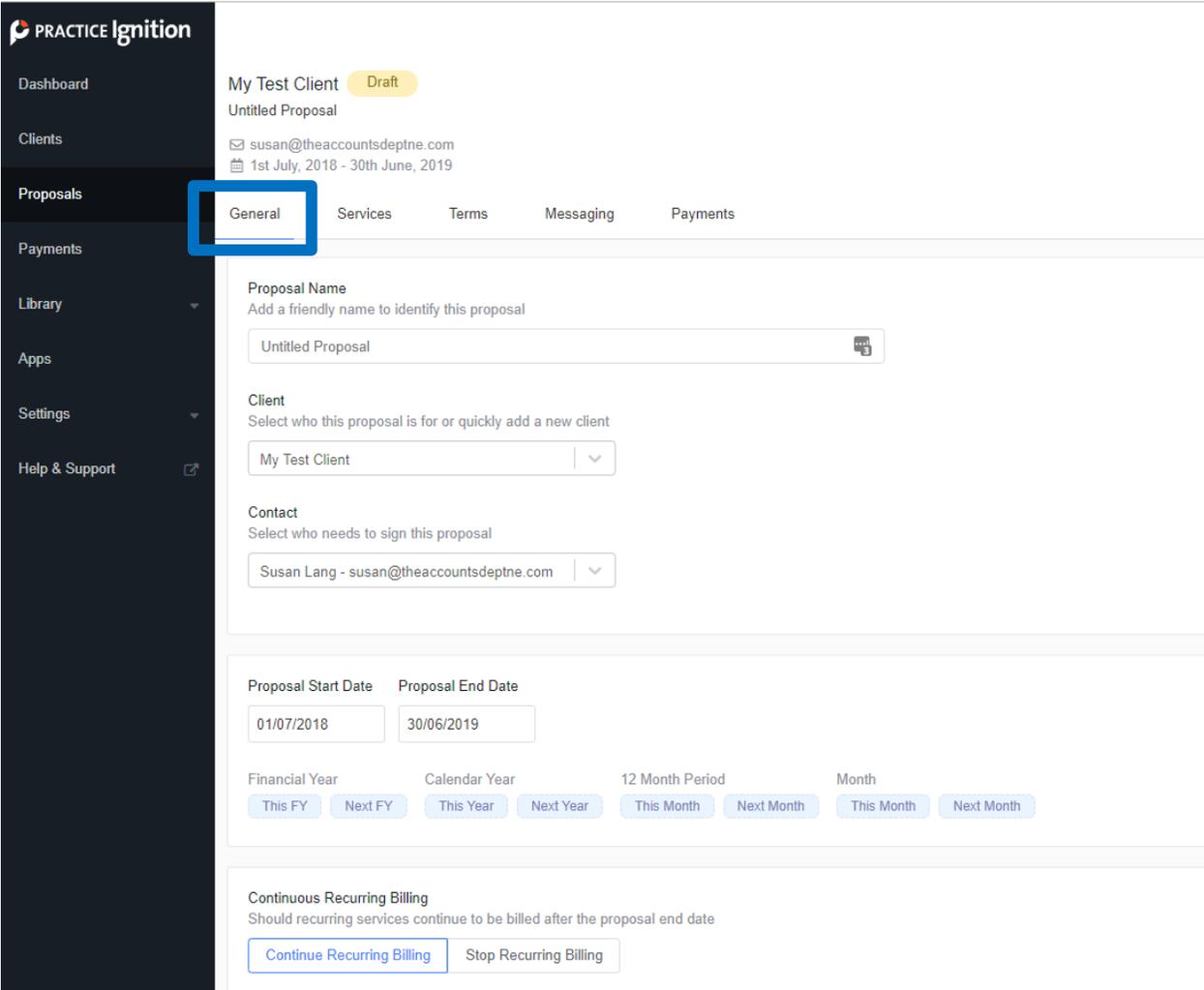


Once you click Export the system will generate a .csv file which can be downloaded a link is emailed to you, when it is ready it is a simple click to download it and a .csv file comprising all of your clients is created.

### Adding a Proposal

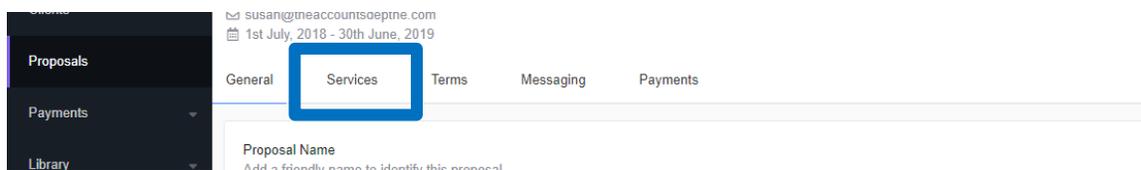
The Proposal Screen initially shows a list of All Proposals; it can then be broken down into different areas, for example, if you wanted to see all those in Draft or Active then clicking the link will take you to a list of just those in Draft or just those that are Active.

To Start a proposal click on the New Proposal button at the top right of the screen, the following will appear.



The Proposal screen asks for information on the proposal, chose a name that reflects a summary of the job, for example, Monthly Bookkeeping or Regular Payroll. The Client can then be selected and the Contact who is going to sign the proposal should be entered too. The proposal start and end dates would usually cover the financial year 12 month period, there are some handy quick links for ‘This FY’ or ‘This Year’ for a calendar year. Selecting ‘Continuous Recurring Billing’ will ensure that the invoices are sent over to your accounting software and will continue after the proposal end date.

Further down this page is the New ‘Accept’ Design feature - this gives you the option to add on your own brochure part of the proposal - this is a great opportunity to remind clients of other services you offer that you’re perhaps not quoting for at this point, or the opportunity to just say thank you for the opportunity to quote! Showing service prices gives the client a breakdown of each point on your proposal. I find that this is useful when you’re preparing an in-depth proposal covering lots of different areas especially when a client may decide to take on all but one service.



Once I’ve added a client and entered the details on the ‘General’ page I usually move along the tabs at the top of this section.

Services - this is the part where the proposal is built up. A job name is required so this could be something like ‘ Monthly Accounts Services ‘ this would then be made up of several services from the Library. This is an excellent way of keeping everything consistent across your clients as when you select a particular Package all the details that were setup initially will come up, so the billing type, price, quantity, description, etc are all entered. This can then be tweaked if necessary for this particular proposal or just click Save Service. Adding in the next service within the job and so on.

In the example I’ve used on the Test Client you can see there are several different types of billing jobs. For example, I find it useful to be able to enter ‘Payroll Setup’ which would be billable on acceptance of the quotation and then ‘Process Monthly payroll’ might be billable on completion of the work. Alternatively, you might have a Monthly Recurring charge so the billing type would be set to Recurring. The other handy area here is the Pro-rata option. If you select this to ‘on’ then the recurring billing will



commence from the start date rather than the acceptance date and the system will invoice for any missed billing periods between proposal and acceptance. For example, if you're charging an annual accounts client £1200 per year but you're two months into the year the system will pick up on this and the first bill will be £200 plus the first month, so you don't undercharge them!

You will end up with a job looking something like this...

My Test Client Draft ✓ Update Proposal

susan@theaccountsdeptne.com  
1st July, 2018 - 30th June, 2019

	On Acceptance	On Completion	Recurring Monthly	Proposal Value
	£4,200.00	£500.00	£300.00	£5,600.00

General Services **Terms** Messaging Payments

Monthly Accounts Services Billing Job

<p>⌘ (Sample) Bookkeeping Monthly - Basic</p> <ul style="list-style-type: none"> <li>This package include a subscription to &lt;&lt; accounting_system &gt;&gt; paid for by &lt;&lt; practice_name &gt;&gt;</li> <li>This package includes a subscription to &lt;&lt; paperless_payables_solution &gt;&gt; to automate data into your file paid for by &lt;&lt; practice_name &gt;&gt;</li> <li>Reconcile credit card and bank statements up to 250 transactions per month</li> <li>Reconcile accounts receivable and payable up to 100 transactions per month</li> <li>Maintain data feeds into your &lt;&lt; accounting_system &gt;&gt; file</li> <li>Issue a monthly report on transaction trends and suggested improvements</li> </ul>	<ul style="list-style-type: none"> <li>This package include a subscription to &lt;&lt; accounting_system &gt;&gt; paid for by &lt;&lt; practice_name &gt;&gt;</li> <li>This package includes a subscription to &lt;&lt; paperless_payables_solution &gt;&gt; to automate data into your file paid for by &lt;&lt; practice_name &gt;&gt;</li> <li>Reconcile credit card and bank statements up to 250 transactions per month</li> <li>Reconcile accounts receivable and payable up to 100 transactions per month</li> <li>Maintain data feeds into your &lt;&lt; accounting_system &gt;&gt; file</li> <li>Issue a monthly report on transaction trends and suggested improvements</li> </ul>	<p>£300.00 ✕</p> <p>+ Pro-rata £2,700.00</p>
<p>⌘ (Sample) Systems Audit</p> <p><b>We will complete a one-time systems audit which includes:</b></p> <ol style="list-style-type: none"> <li>Interview your team and build a system flow of all information that flows through your business;</li> <li>Sign off the existing process with you;</li> <li>Review and investigate applications you could use in your business and match them to your business needs;</li> <li>Decide on the best system to suit the 80%+ of your business needs (no system is ever perfect);</li> <li>Build a step by step guide on how the new systems will be operated. We will deliver this to you in .pdf format for you to keep.</li> </ol> <p><b>With your cooperation, we expect to be able to complete your systems audit within 1 month of acceptance of this agreement (please see terms and conditions).</b></p> <p><small>At the conclusion of the audit, you can choose to move forward with the implementation yourself, or have our team complete any</small></p>	<p><b>We will complete a one-time systems audit which includes:</b></p> <ol style="list-style-type: none"> <li>Interview your team and build a system flow of all information that flows through your business;</li> <li>Sign off the existing process with you;</li> <li>Review and investigate applications you could use in your business and match them to your business needs;</li> <li>Decide on the best system to suit the 80%+ of your business needs (no system is ever perfect);</li> <li>Build a step by step guide on how the new systems will be operated. We will deliver this to you in .pdf format for you to keep.</li> </ol> <p><b>With your cooperation, we expect to be able to complete your systems audit within 1 month of acceptance of this agreement (please see terms and conditions).</b></p> <p><small>At the conclusion of the audit, you can choose to move forward with the implementation yourself, or have our team complete any</small></p>	<p>On Acceptance <b>£1,500.00</b> ✕</p>

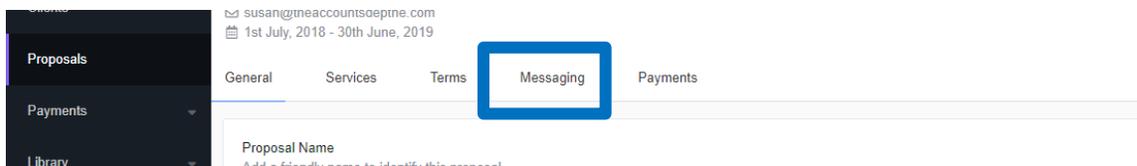
I would then move on to the next tab

susan@theaccountsdeptne.com  
1st July, 2018 - 30th June, 2019

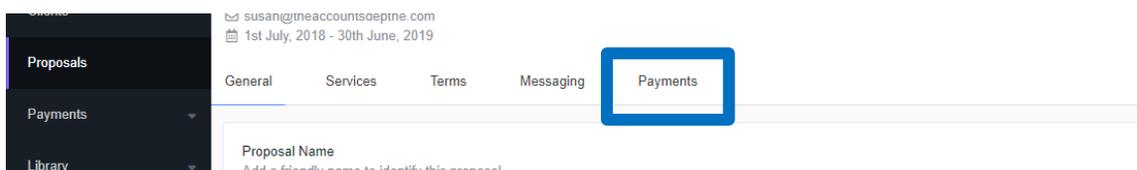
General Services **Terms** Messaging Payments

Proposal Name  
Add a friendly name to identify this proposal

The next tab along gives you the option to select your template for your Letter of Engagement and whether to show or hide the proposal value on the proposal acceptance, engagement letter and web, and the period end for the engagement letter.



The Messaging section is really useful. It puts the ‘covering email/note’ to your proposal and I usually use this to put a personalized note briefly explaining the proposal and thanking them for their interest. The client can respond to this message and the proposal once you have sent it to them.

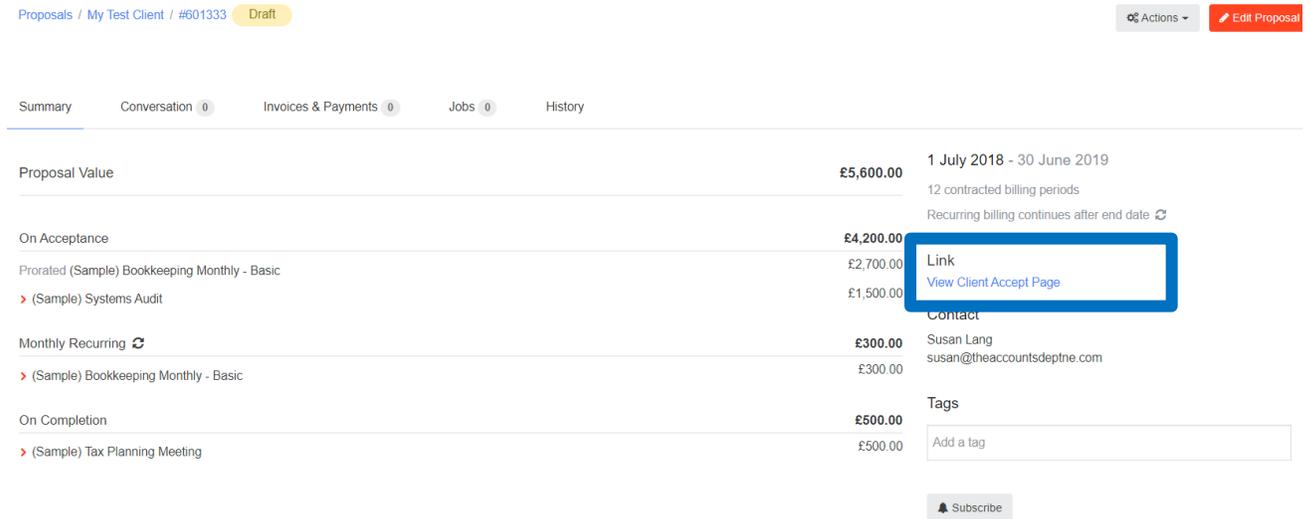


Payments section - this covers a new function within PI. There has always been an option to take card payment; but here you can setup an automatic payment system, so when your client is happy with their proposal they can also sign up for the direct debit at the same time. The automatic collection of the client’s payment as per your proposal gives improved cashflow and you can save time in chasing clients for payment! This means that the invoice is raised, payment is then automatically taken and this whole process is updated in Xero too.

Once you’re happy with a Proposal its very easy just to click Create Proposal.



The next screen gives you an overview of the proposal. From here you can see the Proposal Value, each individual area of the proposal and how it will be invoiced, the number of billing periods - I usually check this to make sure my dates are correct. There is also a Link to View the Client Accept page.



I always go here and check to see exactly what my proposal is going to look like that the client is going to receive. Clicking the Link gives you an on screen view of the proposal - Section 1 summarises the job and section 2 allows the client to review, sign and accept - this also shows the client your letter of engagement. I like to create a pdf copy for my file, so this screen also gives you the chance to do this by clicking View PDF and saving it in the client folder.

If you chose to use the New Client Accept Design layout when preparing your proposal, this link will show you your uploaded document to the left of the screen and then the detail of the proposal to the right of the screen. This is such an impressive professional view that I really like, I have had clients comment on how impressive the proposals look and feel when they receive them through which can only make my practice look more professional too.

Once the client has reviewed this they just need to click the box to Accept the Terms, Type their name and click Accept. It is very straightforward.



They will receive a tailored email and you will receive a notification to say the client has accepted the proposal. As mentioned earlier, it is definitely worth going through the System Setup and ensure that your templates are all spot on and branded before you send that first proposal.

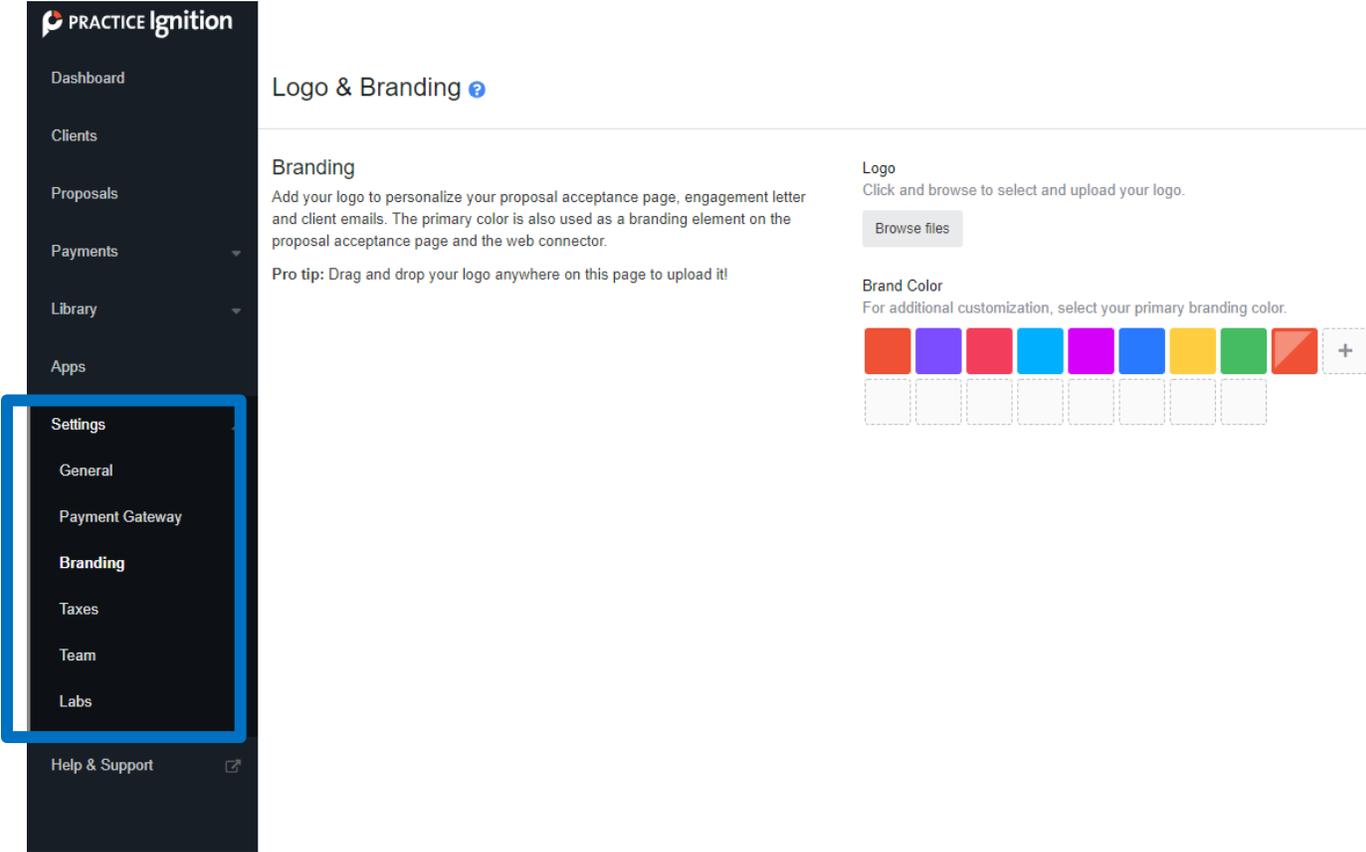
## System Setup Requirements

Under General Settings the software records your practice name and other details; This is also where you enter the default date that will be used on your Invoices - because the system is synchronized with your accounting software it will automatically produce an invoice each month which will appear in the Drafts section of your Accounting software.

The software allows you to tailor the look of the software to your practice.

## Settings

This section allows you to upload your Logo and Branding Colour



## Library

The screenshot shows the 'Services' page in the PRACTICE Ignition system. The left sidebar menu is visible, with 'Library' highlighted in a blue box. The main content area shows a table of services with columns for 'Name' and 'Billed'.

Name	Billed
(Sample) Addon << integration_name >>, Setup and Training	On Completion
(Sample) Annual Accounts and Tax Return	Monthly
(Sample) Bookkeeping Monthly - Basic	Monthly
(Sample) Client Review Quarterly	Monthly
(Sample) Ledger Conversion, Setup and Training	Upfront
(Sample) Ledger Ongoing Training and VIP Support	Monthly
(Sample) Systems Audit	Upfront
(Sample) Tax Planning Meeting	On Completion

In the Library Option there are some standard ‘Services’ already setup and some ‘Templates’

It is worth spending the time here to get this right as it makes the creation of a proposal even easier. The team at PI are happy to assist with this process and will organize a one-to-one call where they are able to ‘share screens’ and help with the setup, as it’s usually a one off process you won’t need to be doing this all the time.

So, setup all of the Services that your practice offer, tailor the Letter of Engagement to suite the needs of your practice and make sure that the Email templates are in line with your policies too.

Then you’re ready to add a proposal.



## Getting Help from the PI Team

If I have had any questions I have found that the team at PI are incredibly knowledgeable and helpful. The chat function which is always on screen allows you to chat online with an advisor, or search for an article to answer an issue.

When I initially setup the software they were happy to login and assist when I needed guidance setting up the templates and services, especially the letter of engagement.

The screenshot shows the Practice Ignition help center interface. At the top, there is a navigation bar with the Practice Ignition logo and a link to 'Go to Practice Ignition'. Below this is a search bar with the placeholder text 'Search for articles...'. The main content area is titled 'How to get help from Practice Ignition support' and includes a sub-header 'Getting Help' with a brief description and a link to 'I have a "how-to" question' and 'I have a technical issue'. The sidebar on the right contains a chat function with the text 'Hi Susan' and 'We're here to answer your questions about Practice Ignition. Ask us anything!'. It also features a 'Start a conversation' section with a 'New conversation' button and a 'Find an answer yourself' section with a search bar.



## Pricing Structure

**PRACTICE Ignition** [How It Works](#) [Features](#) [Customers](#) [Pricing](#) [Resources](#) [Sign in](#) [Book a demo](#) [Try It FREE](#)

Try It Free      Try It Free      Try It Free

Save up to 16%

Monthly  Annual

	£ 325 <sub>GBP</sub> per month	£ 129 <sub>GBP</sub> per month	£ 65 <sub>GBP</sub> per month
<b>Payment Rates</b>			
Domestic Credit Cards	1.3% + 20p	1.4% + 20p	1.5% + 20p
International/Amex Cards	3.6% + 20p	3.60% + 20p	3.6% + 20p
Direct Debit	1% + 20p (£2 cap)	1% + 30p (£2.50 cap)	1% + 50p (£3 cap)
<b>Features</b>			
Active Clients	1000	250	25
Additional Active Clients	60p	£1.20	£1.85
Number of Proposals & Users	Unlimited	Unlimited	Unlimited
Support Queue	Priority	Standard	Standard
Service Library with Pricing	✓	✓	✓
Signed Proposals Secure Storage	✓	✓	✓
Zapier Integration	✓	✓	✓
Accounting Integrations	✓	✓	✓
Workflow Integrations	✓	✓	-
Website Integration	✓	✓	-
Business Intelligence Dashboard	✓	✓	-
Concierge Onboarding	✓	-	-
Best Practice Coach	✓	-	-

£65 per month for a small practice may seem to some to be quite a lot, but when you think about how much time this software saves you. In my case I spent an awful lot of time preparing individual proposals for each prospective client. Once I had PI setup this saved hours for each one and the professionalism of the quotes increased drastically. The admin involved in the letter of engagement and getting the client to sign it has been dramatically reduced too.



## Key Strengths

- Cloud based, allowing access anywhere, anytime using any device connected to the internet
- Time saving - it's like have a dedicated admin person producing proposals
- Rollover Proposals - saving time with proposals that need to renew each year. Great opportunity to re-connect with clients discuss needs and deal with price increases.
- Consistency - the Services section means that you consistently quote clients the same for each 'Package' on offer to them.
- Comprehensive support from knowledgeable support team
- New Proposal Design allows you to 'upsell' by advertising any service that you're not quoting for ensuring the client know you offer a full service.
- Great Communication with the dedicated Customer Success Manager
- Free Tutorials and Online one-to-one sessions available with the support team

## Key Drawbacks

I was so impressed with how much time this software saved me and how structured it made my proposal procedure that I have found it quite difficult to pick out any negatives. The only drawback I can see would be:

- Some smaller practices may find it a little bit expensive.
- I would like to be able to tailor the dashboard to show the data most important to me.



## Summary

As mentioned above I have been very impressed with this software. My overall opinion is that the software allows a practice to streamline the client onboarding saving a massive amount of time.

Before PI, my admin assistant would spend at least one whole day on monthly recurring invoices alone. Now these are done in under an hour. How many times do you worry that you may have missed a clients first months' invoice, or a timesheet that doesn't make it to be invoiced that is then forgotten about? With PI this invoice would come through automatically to your drafts in Xero and this would remind you to check the time sheet and enter the correct number of hours.

Once the system is setup and tailored to your practice with branding, templates and services, the regular day-to-day operation of the system is very straightforward. I would certainly recommend taking up the offer of your 'Intro call' when you sign up as the team at PI are incredibly helpful, knowledgeable and willing to spend the time to help you get it right from the start.

I like the Weekly Summary email that I receive, this is a great reminder of Proposals that have been Accepted or are Awaiting Acceptance and any that are due to expire too.

It is invaluable to me in my practice and I am confident in my proposals being professional, correct and the synchronization with my accounts software is vital.

