

e-BAS Accounts Maximizes Teamwork Projects for Bookkeeping Clients

The Company

e-BAS Accounts is a bookkeeping agency that encourages the use of cloud-based accounting programs to promote collaboration, transparency, and accountability between themselves and their clients.

Their team utilizes several online applications at e-BAS Accounts, so they can provide services to clients remotely. They provide their customers with flexibility and reliability through their simple, efficient, professional, and collaborative service.

The Challenge

With 30+ clients, e-BAS needed software that enhances unification and communication essential to the prosperity of e-BAS Accounts. It was vital that no client or task would be forgotten. With only one employee and a handful of contractors, the various tasks and client information could become lost with time and growth so transparency and scheduling were essential features for them.

The Solution

Managing multiple departments, companies, or ledgers can be daunting, just as managing multiple projects and tasks can be, which is why Teamwork Projects is a surprisingly ideal fit for keeping on top of bookkeeping work. With the detail and levels of tasks within Teamwork Projects also comes versatility to structure your workload in a customized manner.

From small personalizations, such as featuring your own logo to larger elements like building projects and tasks, the functions of Teamwork Projects act as your own assistant taking care of your clients like part of the team. The main idea is to bring all of the projects and the personnel together in one place so that all relevant information is kept in one central area rather than across several applications.



Company name:
e-BAS Accounts

Primary Industry:
Bookkeeping

Secondary Industry:
Financial Management/Consulting

Headquarters:
Torquay, Victoria, Australia

Employee count:
1–10

Website link:
www.e-bas.com.au



Communication and Organization

Louise McLoughlin, owner and manager of e-BAS Accounts, set each of her clients up as a "Project". Each client has specific task lists set up for them under their project; some are recurring so she relies on the "repeat" function. This automates her system and ensures that they don't forget to do anything for any client, ever!

Efficiency and Convenience

Louise has a login feature on her website and each client can log into their own portal which is actually their Teamwork Projects. She asks each client to upload any files related to their bookkeeping assignment there and also that they send messages to her or other staff via their portal. This approach centralizes all data related to a particular client stays in one place, eliminating the need to search through various systems to find the information she needed.

Collaboration

Her approach to using the features unifies every project and each member of personnel working on them, together. Teamwork Projects allows for the convergence of all information and projects under one easily-navigated cloud-based umbrella to ensure high performance from the team and constant satisfaction for customers and clients.

IN THEIR WORDS

"In 2010, I found Teamwork Projects and gave it a try. Within the first 10 minutes, I knew I had found the product for me. It was feature-rich but user friendly. It had everything I was looking for and more."

"This software literally gave me back my sanity! I was back in control of my workload. My growing client list no longer scared me because I was finally managing it, or rather, Teamwork Projects was managing it for me like an extra staff member, an extra pair of hands if you like, doing the heavy lifting while I just get on with the job. Perfect!"

"I don't have to search around five different systems to find information I need - it's all in Teamwork Projects."

"Teamwork Projects, as with any project management software, is designed to bring your workforce together and work more efficiently as a team on specific projects. The main idea is to bring all of the projects and the personnel who are working on them together in one place so that all relevant information is kept in one central area rather than across several applications."

- Louise McLoughlin
Owner and Manager
e-BAS Accounts



Start Your FREE Trial

Teamwork.com offers a suite of online productivity software that helps run your business.

