

## DRIVE User Quotes

### Niall Garvey: Oliver Freaney & Company - 100 users

"We really liked Relate Software for their Time & Billing, Financials, Accounts Production, Company Secretarial and CRM as an integrated suite. However for a large practice like ours the ability to centrally store our client list was of huge importance because marketing has become a mission critical function within the larger practice and DRIVE provides the tools for us to understand our customers better and target their needs more effectively."

"At Oliver Freaney & Company we are constantly reviewing our software packages to ensure that we get the most efficient usage from them. With this in mind we have made the decision to switch to Relate as we feel that the competitor's packages lag far behind in the field. Relate is the only software provider for us."

### Tony Carey: Cooney Carey 40+ users

"We bought DRIVE as it was the only fully integrated database on the market. DRIVE replaced our time and billing system, our CRM system and our back office financial system. DRIVE does them all very well and fulfils our requirements. We are heavy users of Pocket PCs/Blackberrys and remote email, DRIVE's ability to integrate these is now critical to our business."

### Patrick Thorpe: Delaney Locke & Thorpe - 20-30 users

"As a practice with 25+ staff, we are heavily reliant upon software but do not have bandwidth for an in-house IT staff member. We decided to implement DRIVE for a variety of reasons - primarily its range of features and functionality. However an equally important factor in our decision making process was the degree of communication from Relate which was at the time a stand out factor. It is fair to say that the level of support we have received during implementation (Q1 2004) and critically since implementation (over three years ago) and on an ongoing basis has been superb."

### Mark Butler: Sheehan Quinn 10-20 users

"Implementing DRIVE has assisted in the management of our practice. The integrated Time & Billing is central to how we run our practice and the communications allow us to centrally store emails, letters, faxes, and documents that would otherwise be left in a number of different places. Centralising our client and practice data has helped in making running our practice more focused."

### Paraic O'Dowd: Prima Management 5-10 users

"With offices in Dublin and the Isle of Man, DRIVE has allowed us to centralize the administration of our practice. I spend a lot of time travelling between offices or meeting clients and therefore I constantly need access in real time to my client's information. DRIVE's use of the latest technology allows me to get access to critical information fast."

### John McQuillan: McQuillan Chartered Accountants - 1 user

"As a sole practitioner I wanted a software system that would provide a solid platform for future growth and give me a competitive advantage. I use the entire system from diary, email & document management to Time & Billing to Accounts Production to Company Secretarial. Setting up my practice I had enough things to worry about, at least software was not one of them."

#### DRIVE Modules

- Central Contact Database
- Communications Management
- Time & Billing Management
- Deadline Management
- Financial Management
- Marketing Management
- Document Management
- Project Planner
- Client Accounting

# Drive

Central Contact Database

#### Products

- Relate Accounts Production
- Relate Company Secretary
- Relate Corporation Tax
- Relate Personal Tax

## DRIVE: Key Features

### Central Contact Database

Clients, Projects, Prospects, Contacts, Staff & Suppliers  
Contact Management  
User-definable Records & Fields  
Conflict Searching

### Communications Management

Diary, Tasks, Events, Alerts & Reminders  
Call & Fax Logging  
SMS Messaging  
Centralised Drive Email Database  
Word Document Integration  
Outlook Integration (Send Outlook Emails to Drive)  
PDA Integration

### Marketing

Data Mining Lists  
Query Builder  
Letter, Email & SMS Merging  
Updates Client Communication History  
Auto Signatures

### Document Management

Document Scanning/Indexing/Retrieval/Storage  
Auto Folder Creation  
File Types PDF, TIFF, JPEG, BMP, PIC  
Twain Compatibility

### Deadline Management

Diary of Important Client Dates  
Alerts & Reminders  
Number of Days Before Due Date  
Staff Schedule of Dates

### Time & Billing

Time Sheets & Expense  
Outlay Recovery  
Raise Bills Through Microsoft Word Templates  
Cross Client & Multi-Project Billing  
Pro-Forma Billing  
Billing on Account  
Multiple Recurring Billing Methods  
Credit Notes with WIP Reinstatement

### Financials

Simple & Formatted Trial Balance  
Budgets & Comparatives  
Bank Reconciliation  
Bank Payments & Lodgements  
Bank Transfers  
Accruals, Prepayments & Journals  
Cost Centres (Multiple Entities)  
Multi-Currency  
Purchases Ledger

### Project Planning

Automatic Creation of Draft Plans  
Year Planner  
Staff/WIP Resource Scheduling

### Client Accounting

Control Monies Held on Behalf of Clients  
Client Bank Payments/Receipts  
Client Ledger Card History  
Inter-Bank Transfers

### Drive Integration

Relate Accounts Production & Audit Working Papers  
Relate Company Secretary  
Relate Corporation Tax  
Relate Personal Tax

### Reports

Over 100 Standard Reports  
Export to MS Word, Excel or PDF  
Adapt & Create Your Own Reports  
Use Crystal Reports

### Technology

Powered by MS.net  
ASP.net  
MSDE/SQL Server Database

## Accounts Production: Key Features

### Program List

- Full Integration with the DRIVE Centralised Database
- 5 Years of Comparatives
- Flexible Reporting
- Send Accounts/Reports Automatically by E-mail
- Watermark and Background Facilities
- Formatted Trial Balance
- Import/Export Facilities
- Check In/Check Out Facilities
- Budget and Variances
- Loan Registers/Asset Registers
- User Defined Journal Types

### Compliance List

- One Master Compliant with ROI/UK/NI Companies Legislation
- Master Complies with FRS 2 Group Accounts - Facility to Produce Consolidated Accounts
- Audit Report Complies with Latest ROI, UK & NI Companies Legislation & with APB Bulletin 2006/1
- Separate Statement of Directors Responsibilities - in Line with Best Practice
- Deals with a Company Limited by Guarantee • Defined Benefit Pension Schemes - Full Disclosure Under FRS 17
- Compliance with FRS 21, Post Balance Sheet Events - Main Change is the Removal of Proposed Dividends
- Tax Reconciliation Note as Required by FRS 19 • AWP - Inclusion of a Partner Completion Checklist
- Audit Working Papers Compliant with Requirements Under ISA's - New Programmes for Fraud and Error, Laws and Regulations and Money Laundering
- Acceptance of Reappointment Schedule - Updated Checklist as a Result of New Ethical Standards

## Company Secretary: Key Features

- Annual return diary/alert manager showing number of days before ARD
- Company incorporations through CRO disk
- Corporate event calendar/diary. • Automatic Late Filing Fee and Penalty Calculator
- Diary pop-up alert warning if a return is due even when you are not in the main package
- Electronic filing of B1, B2, B10's, B73's and B77's directly to the CRO from the software, no re-input
- Automatically checks client AR date with CRO database
- Automatic filling of A/C1, J1A, J2 and J3 forms and 30 other forms
- Warns of e-filing late returns as fees are taken out of firms account
- Automatically produces appendices for all forms
- Produces Microsoft Word & PDF versions of forms
- Combined statutory registers, which are ODCE compliant including cover & index pages
- Checks both manual and electronic returns for errors and prints a draft water

- Creates merge files for companies, directors, secretaries and individuals, details for Excel, Word and Access formats
- Handles Alternate Directors and joint secretaries
- Produces standard notices, resolutions, board/EGM/AGM minutes and covering letters
- Global company, individual and addresses database with conflict search
- Reports on all companies or individuals using a particular address, i.e. registered office
- Full maintenance of memorandum & articles on companies for recalling, amending & printing

### Notes:

- Full data conversions available from a wide range of data sources (request conversion list)
- Single and multi-user versions available
- Installation & training on site or at Relate offices
- Best Software, licence and support price guarantee, please call for a quotation today

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"success built on service"



Q: What do  
Oliver Freaneys  
Cooney Carey  
Delaney Locke & Thorpe  
Sheehan Quinn  
& John McQuillan  
have in common?

# A: They all use...DRIVE to run their practice.



Sandyford Business Park has been taken as a sample area where we have numerous clients to show how **DRIVE** is used by practices of all sizes.

## vodafone

Relate became a Vodafone partner in 2006 enabling us to bring mobile technology to accountants in practice. We integrate with Blackberry and Pocket PC as well as utilizing all the latest technologies to enable accountants to work on the move.

## Microsoft

The relationship between Microsoft and Relate is a very important one for Accountants. Relate are a Microsoft Gold Partner which means that Relate Software possess a high degree of competence and expertise within a wide range of Microsoft technologies. This enables us to work with Microsoft products such as Word, Excel, Outlook, Pocket PC, SQL, SBS, etc.

In 2006 Relate were a Microsoft Worldwide Innovation Partner of the Year Finalist. DRIVE was one of the first packages in Ireland and the UK developed using C# and ASP.Net for the MS .NET Framework. DRIVE utilises a single MS SQL Server database. DRIVE Accreditations from the Microsoft Euro Test Centre.

### McQuillan Chartered Accountants

**1 user practice using DRIVE, Relate Accounts Production and Company Secretarial to run his practice.**

John is a sole practitioner based in Sandyford Industrial Estate, who recently returned to practice after 11 years with various companies within the ESB group.



**5-10 staff, 2 Offices. Using DRIVE to bring their offices together and enabling remote working.**

Management Limited is a firm specialising in providing accountancy services to Contractors, particularly Computer Contractors. With offices in Dublin and the Isle of Man Prima offer a range of accounting services to contractors both in Ireland and throughout Europe.



**40+ staff. Integrating all their old systems into one system was the key.**

The Cooney Carey Group, formed in 1983, is regarded as a top quality business in the financial services sector providing auditing, taxation and business advisory services. In September 2005, Bank of Ireland chose Cooney Carey as its partner in producing a book advising their clients on Business Start Ups.



### Sheehan Quinn & Co.

**10-20 staff. Started with Relate Company Secretary but moved to DRIVE to improve their Time & Billing.**

Sheehan Quinn & Company, Chartered Accountants, is a medium sized firm of Chartered Accountants in general practice, operating from Sandyford, Co. Dublin and servicing clients throughout Ireland. Founded in 1977 the firm employs a total of 13 persons with specialist and qualified staff in key areas of service.

### DELANEY LOCKE & THORPE

**20-30 staff. Started off needing a Time & Billing system but communications became central to the running of their practice.**

A three partner, progressive, firm of Chartered Accountants, Business & Corporate Finance Advisors and Tax & Business Consulting Specialists. They specialize in the SME sector, mainly owner managed, family run businesses and entrepreneurs.



### OLIVER FREANEY *Company*

**100 staff. One of Ireland leading practices spent 2 years looking at every product in the marketplace but felt DRIVE was the only product to run their practice for the next decade.**

Oliver Freaney and Company is one of Ireland's leading firms of Chartered Accountants and Business Advisors. Since its foundation in 1958, OFC has acquired a wealth of experience in the creation of effective business and financial solutions for clients across all sectors.



Relate Company Secretary Users



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