



Invoicing & Accounts  
Made Easy

# Accountants & Bookkeepers

~~~ PARTNER PROGRAM ~~~



[www.surfaccounts.com](http://www.surfaccounts.com)



01 4940 580



[info@surfaccounts.com](mailto:info@surfaccounts.com)

# Overview

So, you are ready to grow your practice with Surf Accounts. You are just a few steps away from unlocking all the great benefits of using Surf Accounts and the Surf Accounts Partner programme.

Becoming a partner allows you, your practice, & your clients to enjoy a significant and closer relationship with Surf Accounts.

## WHAT IS SURF ACCOUNTS?

Surf Accounts is accounts and CRM in the cloud. Aimed at small businesses it allows you to access and update accounts anytime, anywhere and on any device. This freedom of access allows you to work when and where you like.

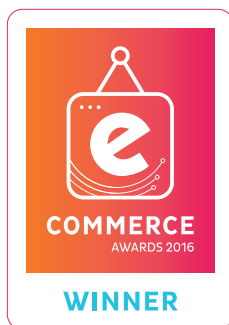
Do your accounts at the office, at home, or on a mobile device. No longer be restricted to that age old desktop software.





## MULTI AWARD WINNING SOFTWARE

- ▶ Bank of Ireland Startup of the Year 2016
- ▶ Bank of Ireland Best Online/Digital Business 2016
- ▶ Accenture DMA: Silver Best Financial Services 2017
- ▶ Realex E-Comm Awards Best Micro 2016
- ▶ Web Summit US Alpha programme in both 2014 & 2015
- ▶ Business All-Stars Finalist 2018





# The Surf Service

We are committed to working in partnership with Irish Accountants & Bookkeepers to offer the best service possible for your practice and your clients. We not only want to help grow your practice but improve the service you provide to your clients. We will always be on hand to help your clients get up and running on the platform.



As part of the Surf Accounts Partner programme you will benefit from:



Telephone and  
email support  
for your practice



Affordable training for  
you and your clients



Dedicated Account  
Manager to help  
grow your practice



## BECOME A CERTIFIED PARTNER

Surf training courses will give you the skills required to manage your client's accounts easily. We offer classroom tutorial based courses for you and your clients.



## BENEFITS OF PARTNER PROGRAM

As a Surf Partner we will help to promote and switch your clients to Surf Accounts. Your dedicated account manager will be on hand to provide support and assistance to you and your clients.

See below the promotional materials available to your practice to help you promote your partnership with Surf Accounts:

### Co-branded promotional material available to partners:

- ▶ Surf login on practice website
- ▶ Surf information and logo placed on your website
- ▶ Certified Partner Badge placed on your website
- ▶ Brochures for your office
- ▶ Email and letter templates to send to clients
- ▶ Posters/Window stickers
- ▶ Pop up signs
- ▶ Surf branded merchandise available for your office

### How we can help you to switch your clients from other systems:

- ▶ We will do One to One demonstrations to your clients
- ▶ We will do Group presentations on your behalf
- ▶ Switch clinics, we will convert your clients data



# Product Features

As a product Surf boasts a multitude of features & routines. Everything your client needs to easily run and grow their business. Below is an example of just some of the functionality within the package:



Smart  
Invoicing



Get Paid



Easy VAT



Electronic  
Banking



SEPA  
Payments



Multi-Currency



Produce Quotes  
& Orders



Handle  
Inventory



Business  
Divisions



Time  
Tracking



RCT



RTD



CRM



Dashboards



Reporting






Mobile

# Pricing & Discounts

| <b>Starter</b><br>PLAN                                                                                                                                       | <b>Standard</b><br>PLAN                                                                                                                                                                                                      | <b>Premium</b><br>PLAN                                                                                                                                                                                                                                                                                      |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>€14.95*/month</b><br>Limited transactions                                                                                                                 | <b>€19.95*/month</b><br>Unlimited transactions                                                                                                                                                                               | <b>€29.95*/month</b><br>Unlimited transactions                                                                                                                                                                                                                                                              |
| <ul style="list-style-type: none"><li>✓ Invoicing</li><li>✓ Banking</li><li>✓ General Ledger</li><li>✓ VAT</li><li>✓ Purchases</li><li>✓ Reporting</li></ul> | <ul style="list-style-type: none"><li>✓ Invoicing</li><li>✓ Banking</li><li>✓ General Ledger</li><li>✓ VAT</li><li>✓ Purchases</li><li>✓ Reporting</li><li>✓ Quotes &amp; Orders</li><li>✓ Divisions</li><li>✓ CRM</li></ul> | <ul style="list-style-type: none"><li>✓ Invoicing</li><li>✓ Banking</li><li>✓ General Ledger</li><li>✓ VAT</li><li>✓ Purchases</li><li>✓ Reporting</li><li>✓ Quotes &amp; Orders</li><li>✓ Divisions</li><li>✓ CRM</li><li>✓ RCT</li><li>✓ Stock</li><li>✓ Multi-Currency</li><li>✓ SEPA Payments</li></ul> |

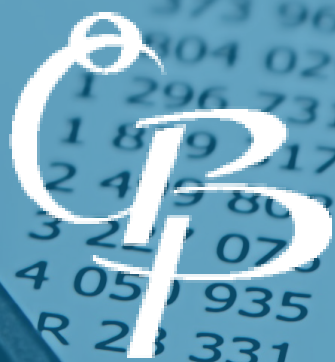
## DISCOUNTS

|                                                                                                                     |                        |
|---------------------------------------------------------------------------------------------------------------------|------------------------|
|  <b>Bronze</b><br>5–50 clients   | <b>10%</b><br>discount |
|  <b>Silver</b><br>50–100 clients | <b>15%</b><br>discount |
|  <b>Gold</b><br>100+ clients     | <b>20%</b><br>discount |

\* Prices shown exclude VAT.



# Partner Experience



O'GORMAN  
BRANNIGAN  
PURTILL & CO.

## O'GORMAN BRANNIGAN PURTILL & CO. STARTED IN BUSINESS IN 1973.

Our early beginnings were in the difficult years of the early 1970's. We grew and prospered in tandem with the economy and now we are well positioned as ever to cater for the needs of our extensive and growing client base. Through our partner led offices we offer each client a hands on approach that will deliver the desired results in a timely and efficient manner. Since opening our doors in 1973 we aim to ensure every client gets a progressive and personalised service and we aim to combine the technical expertise of a larger practice with the hands on approach that small and medium businesses require. As the client you are our sole focus and each individual client has a dedicated partner to whom they can liaise with. It is this service and commitment that has led to the growth of the firm to one of the largest independent firms in the South East. Founding partner Tom O'Gorman knew the importance of servicing the clients' needs during good times and bad. We have found over the years that a large proportion of our new clients come to us on the recommendation of existing clients. Tom is now the 'senior' partner in a family run firm, joined by sons Patrick, John and Thomas whose combined expertise gives the firm a unique insight into the needs of its clients. The four O'Gorman's are joined by tax expert Audrey Crean as partners in the firm that has an additional staff of 25 divided between Clonmel and Dublin. The Dublin office opened in 2002 and this is led by partner John O'Gorman who has ensured its growth from then to now.

### **What made you choose Surf Accounts?**

*(What difficulties were you finding with other packages?)*

We switched to Surf due to news from Sage that Tas Books was being discontinued. A lot of our clients used Tas Books as their main bookkeeping package. We were interested in a cloud based package due to its benefits of dual immediate access for clients and ourselves and access on any internet based computer. We use Relate products ourselves inhouse so we were happy that we knew the history of the product's owners and developers prior to using. It was very easy to introduce our clients to Surf and the time saving when integrating with Relate Accounts Productions has been a major benefit too.

### **What benefits have you found since switching to Surf Accounts?**

The main benefits we have found is the ease of set up; dual access for ourselves and clients; ease of use; excellent reporting on invoicing and statements; excellent support team. This can all be easily managed in the practice portal. We highly recommend Surf to all our clients.

# Customer Reviews

“

We recommend Surf Accounts for small to medium-sized businesses looking for a simple, user- friendly online accounts package. It provides all the functionality of the leading accounts packages & allows speedy data entry to efficiently run your business with less hassle.”

**Avril Shortt** – Guardian Accountants



“

As an accountant, I recommend Surf Accounts to all my clients. Easy to use cloud-based accounting package that is applicable to all types of industries and is easily scalable making it a perfect choice for all SME's.”

**Fiona Connolly** – Bookkeep



“

We have found that Surf allows our clients to have a real-time view of their financial position and the ability to easily access that information whenever they need it.”

**Brian Buckley** – Brian P. Buckley & CO



“

I think Surf is probably the most user friendly, it's presented a lot better than Sage 50 and you can drill down on anything to change it rather than having to try track back to where it was originally entered which saves a lot of time.

**Matt Donohoe** – FHM Accountants







## Payroll made easy

*A cloud based, contemporary, secure and seamless payroll offering for small to medium sized businesses.*

### WITH SURF PAYROLL

- ✓ If you run a business you can process payroll for up to 25 employees.
- ✓ If you are an accountant you can process all of your clients payroll, with plans starting from 50 clients.



Get payroll ready to use in 4 steps. Wizard's setup will direct you on what is needed and where to go next.



Find out the most commonly used payroll information from our contemporary dashboard feature.



Manage all of your employees benefit in kind requirements with our BIK management feature.



Holiday/Leave Calendar. Keep track of your employee's entitlements, leave taken and remaining balance with a HR friendly personal holiday calendar per employee.



Take the manual entry out of payroll – import your employee records direct from your revenue provided P2C.



Analyse your payroll data with our comprehensive reports. Use our departments to get exactly the information you need.

From only

**€9.95 /per month**

*Additional discounts if bought annually / 3-year plan)*

✓ All plans include first class support.

✓ Training is also available.

Call **01 4940580** or e-mail us at [info@surfaccounts.com](mailto:info@surfaccounts.com)

to find out more. Alternatively visit [www.surfaccounts.com](http://www.surfaccounts.com)



Invoicing & Accounts  
Made Easy



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