

# Las Vegas Paperless Solutions<sup>SM</sup>

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## **Palm Coast (FL) CPA Firm Eliminates Paper From Its Tax Practice To Convert Space To Professional Use & Improve Client Service**

### **Customer Profile**

A small firm with a tax-oriented practice began filing tax returns electronically but was still using paper to send returns and correspondence to its clients and to retain in its own files. This, of course, resulted in the traditional costs and other disadvantages of paper ECM systems: Paper, toner, maintenance, storage and delivery costs, as well as the high retrieval costs inherent in paper, especially where the client files must be retained and pulled on a long-term basis. The increasing loss of high-cost professional office space was the paper straw that pushed the firm into a paperless solution.

### **Application**

The firm selected PaperPort® software, now bundled with Visioneer® and Xerox® scanners, to capture paper intake in Adobe® PDF format. The images were then posted to its Windows Network for electronic storage, retrieval and delivery to clients and staff as needed.

Imaged documents were backed up daily with an external hard drive and back up software, similar to the CMS ABSplus line.

The initial tax season paperless went so well that the firm then used the otherwise slack time after tax season to capture the firm's paper archives, and free up valuable professional office space.

### **The Problems**

The firm was faced with the typical accounting office problems of a paper-based ECM system: Too much on-site storage space devoted to paper, increasing staff time spent to copy, file and deliver the paper, rising costs of copy paper, toner and copy machine maintenance, and the retrieval difficulties inherent in paper.

The firm wanted to cut its paper-handling costs, especially professional office space rent, and improve its file retrieval system to enable better client service.

## **The Solution And The Benefits**

Digital ECM has reduced the firm's paper storage and retrieval costs and efforts, and improved client service.

Expensive office space once devoted to paper storage is now available for new staff and other productive uses.

Clients who used to be told they would be called back once the file was pulled can now have their questions answered immediately from images retrieved effortlessly from the computer.

The entire ECM system has paid for itself many times--and keeps on paying. The ROI from rental savings alone is very impressive for these scanners.