

Industry	Accounting
Critical Issue	Too much time spent searching for tax records; and a difficulty sharing documents with clients.
Solution	Affordable, SQL Server-based, secure electronic document management system that included Web access to documents for customers.
Result	Improved customer service with the ability to securely share tax documents via the Web; also saved time and reduced storage space.

Friesen Pankratz & Associates use Document Locator to create a paperless office environment

FPA is a full-service accounting firm located in Abbotsford, BC Canada, that serves more than 450 businesses in the greater Frazer valley. It provides its clients a full range of services including preparing over 1,200 personal tax returns per year.

The Problem: retrieving paper records

Ted Friesen was first introduced to document management when he attended an accounting conference and listened to a presentation about how accounting firms were going paperless. It wasn't too long after attending the conference that Ted was reminded of document management when, as he puts it, "We literally spent a day trying to find a document." This one event crystallized just how much time FPA was wasting searching for documents and led the partners to decide to purchase a document management system.

The search for a Solution

Ted investigated several systems before deciding on Document Locator. In the end he selected Document Locator for four reasons: ease of use, affordable price point, SQL Server based, and ability to securely share documents with clients through Document Locator's WebTools. Ted stated, "Its deep integration with the Microsoft architecture just makes it very easy and intuitive to use."

From paper to Web access and more

FPA first put Document Locator to work scanning client tax returns and work papers. Next they made these documents available to their clients via the Web.



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Ted Friesen

Friesen Pankratz & Associates
Abbotsford, BC Canada

Microsoft
GOLD CERTIFIED
Partner

Seamless
Windows
Integration

Then they expanded their use of Document Locator to manage electronic documents such as Visio files, Excel spread sheets, and Word documents. Ted said, “We use Visio to model our clients’ operations. We find it very useful to be able to right click on a Visio file and see the version history of each document complete with version notes, date edited, and who edited the

document.” He added, “It’s also been a great tool for managing policies and procedures.”

The Results

FPA has plans to do a lot more with Document Locator including implementing workflow processes. They are currently back scanning old business records, which will empty their storage room and allow them to add two more offices. Ted said, “Our investment in Document

Locator is saving us time and improving customer relations. We recently had a client stop by the office and ask for copies of her past three years’ tax records. She thought we’d need half a day to find the documents and copy them for her. Using Document Locator, we were able to quickly find and print copies of the documents and she was on her way within a couple of minutes.”