

# Accounting Firm Harnesses AccuRoute to Streamline Fax Communications, Improve Efficiency, and Ensure Data Security



## The Challenge

It was time for this top three Global Accounting Firm (the Firm) to update their processes. Their existing document capture solution was no longer able to handle the current volume of their scanning and OCR requirements – up to three million pages per month, many of them multi-paged documents requiring additional attention to sufficiently scan and store. Their current scan solution was bogged down, which meant the Firm's productivity was negatively affected due to an enormous back-log of time-sensitive documents for tax clients.

The Firm needed a comprehensive, scalable solution for automating its fax, scan, and document distribution processes. By implementing this new system, they needed an all-in-one solution to help reduce costs, consolidate resources, and ensure that the data they scanned was secure to protect their clients and adhere to corporate and government regulatory obligations for auditing purposes.

## The Solution

In anticipation of the upcoming tax season, this Firm needed a complete solution, fully implemented within six weeks of signing the agreement to embark on this joint project.

While thinking through a solution, the Firm needed to consider the over 12,000 users who regularly scan and OCR large volumes of multi-paged documents on approximately 1,000 HP devices across their 28 US-based offices. The solution needed to be simple to deploy, with a user-friendly interface that promoted quick user adoption.

It was determined that AccuRoute document capture and handling platform was the perfect solution to handle the Firm's level of scanning volume and intensive document conversion, as well as the tight timeline required for project completion.

## GLOBAL ACCOUNTING FIRM

This Global Accounting Firm needed a comprehensive scanning and OCR solution to handle over 3 million pages per month scanned by 12,000 employees in 28+ offices. The solution needed to integrate with the firm's existing fleet of 1,000 HP MFPs.

- **Reduced costs** by recreating IT infrastructure and eliminating traditional fax machines
- **Data security** to ensure client confidentiality and adhere to compliance standards
- **Extensibility** to many document-routing workflows requiring multiple distributions, archiving, and security
- **Greater productivity** through highly available and distributed MFPs
- **Scalable solution** as the firm and the firm's client needs evolve and grow

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“With AccuRoute, we have been able to rework our current fax infrastructure so we are efficiently leveraging our MFP devices for our fax communications. We are quicker to respond, more secure, and our employees are equipped with tools to help them do their job faster and more comprehensively.”

## The Process

Upon deploying AccuRoute, the Firm quickly achieved a significant and measurable return on investment, immediately reducing costs around printing (like device maintenance and supplies such as toner and paper), as well as reducing the need for additional document storage, including real estate energy costs associated with office storage.

With the adoption of AccuRoute, the Firm's employees increased their productivity and benefitted from the following secure fax communication enhancements:

- User authentication and validation, providing for employee accountability and corporate transparency
- User ID through personalized Routing Sheets and user-defined distribution lists
- Automatic formatting to text-searchable electronic copy
- Formatting for transmission and conversion to text-searchable PDF
- Automated archiving with quick, simple retrieval capabilities

AccuRoute integrated with the Firm's new HP devices, which were specifically chosen to work in conjunction with the platform and provided a streamlined user experience – including one-button scanning when sending a fax. These MFPs were used in place of traditional fax machines, greatly reducing redundancy and cost.

## The Result

Today, the firm is capturing and processing their tax documents with AccuRoute's multi-tiered solution through network-enabled HP devices. Paired together, HP and AccuRoute were able to provide the accounting firm a cost effective solution, delivering electronic images of documents from any of the remote offices to the corporate processing center within minutes.

With more efficient, standardized communications processing in place, the Firm quickly eliminated their backlog of time-sensitive documents and drastically improved turnaround times and client service.

As a result of HP and AccuRoute's collective solution, this accounting Firm now has a fully scalable communications infrastructure in place that can expand with their client base, and provide greater user functionality to successfully address all of the paper-intensive business processes tackled on a day-to-day basis, as well as giving employees more time to work on more intensive, high level projects.

**For more information on AccuRoute, visit: [uplandsoftware.com/accuroute](http://uplandsoftware.com/accuroute)**



## About Upland Software

Upland Software [Nasdaq: UPLD] is a leading provider of cloud-based Enterprise Work Management software. Our family of applications enables users to manage their projects, professional workforce and IT investments; automate document-intensive business processes; and effectively engage with their customers, prospects and community via the web and mobile technologies. With more than 4,000 customers and over 450,000 users around the world, Upland Software solutions help customers run their operations smoothly, adapt to change quickly, and achieve better results every day.