

Leveraging AccuRoute to Establish a FoIP Integrated Capture Solution to Undertake Firm-Wide Paper Storage Reduction Initiative

The Challenge

Young Conaway Stargatt & Taylor is a Delaware law firm that, with the help of Upland's AccuRoute solution, has been continuously streamlining its workflows since 2006. Recently, we had two major priorities arise at the firm. First, our fax solution was costly and we wanted to replace it with a virtualized approach. Second, since our firm's current records were now 90% digital, we wanted to begin phasing out off-site paper storage. Working with our partner, Omtool, we set out to discover how AccuRoute could provide an integrated scanning and capture solution to support these projects and increase our firm's efficiencies.

The Solution

In working with Upland it was revealed that AccuRoute Fax integrated with our Avaya Voice over IP (VoIP) phone system. That meant we could discontinue use of our incumbent fax software and consolidate fax communications with Omtool's Fax over IP (FoIP) solution. We now have a fully integrated AccuRoute fax cover sheet that works for both outbound and inbound documents.

Regarding the phasing out of off-site paper storage, the AccuRoute platform has become the central hub for this workflow. AccuRoute integrates with our Microsoft SharePoint platform and our iManage FileSite document management system (DMS) such that our paralegals and department heads use AccuRoute's scan sheets to convert paper to digital files and the software then sends or stores the files in the designated place. Electronic documents are dispatched in an organized way and we continue to reduce our reliance on volatile, expensive off-site storage.

The Result

Our virtualization project allowed us to consolidate our fax communications by fully integrating faxing with our phone system and DMS. By using our AccuRoute infrastructure, which we already owned, and dropping our previous provider, Young Conaway will save a significant amount per year on hardware, software and server costs.



Young Conaway was implementing virtualization firm-wide and needed to replace its incumbent fax provider with a fax over IP solution that would integrate with the firm's Avaya Voice over IP (VoIP) phone system. Also, a firm-wide initiative to maximize scanning and eventually eliminate paper storage required us to become more comprehensive in our use of AccuRoute, software the firm had been using for a decade.

AccuRoute Provided:

- **AccuRoute Fax over IP solution** which fully integrated with the firm's Avaya VoIP system for both inbound and outbound faxing.
- **Integrations** between AccuRoute and the firm's document management applications including SharePoint and iManage FileSite.
- **Customer support** to help the firm attain its challenging goal of scanning paper records to eventually phase out off-site storage.

AccuRoute has helped our drive to go digital and remove paper storage. When documents come in from outside storage facilities, they are scanned and shredded, not sent back to the warehouse. These electronic records increase our firm's knowledge bank and reduce the fees charged to our firm to store or retrieve boxes of paper documents from these off-site storage facilities.

The software has completely transformed our cash disbursement workflow. Our accounting department had previously used blue slips of paper to pay an invoice, manually entering data from the slips. The paper was then kept in boxes for years. Now AccuRoute creates a scan sheet so we can scan the document into our SharePoint library where it is assigned General Ledger codes. SharePoint workflow tools automatically route the invoice into the firm's accounting system so the bill can be paid efficiently.

Over the past decade, Young Conaway has leveraged AccuRoute to streamline efficiency, reduce costs and create an integrated solution. The solution is poised to be especially useful to the firm as it moves toward scanning all paper records in the near future.

For more information on AccuRoute, visit: 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.