

Case Study

**Accounting firm
streamlines
fax, improves
efficiency, and
ensures data
security.**



INDUSTRY
Finance

COMPANY
Top 3 Global
Accounting Firm

This accounting firm used AccuRoute to create a comprehensive and fully scalable scanning and OCR solution to handle over 3 million pages per month scanned by 12,000 employees in 28+ offices. The solution seamlessly integrated with the firm's existing fleet of 1,000 HP MFPs, dramatically improving productivity. AccuRoute also provided the additional benefit of secure and compliant fax.



How can a global accounting firm reliably handle millions of documents per month?

This firm urgently needed to update their document processes.

This top three global accounting firm needed a comprehensive, scalable solution for automating its fax, scan, and document distribution processes. Their existing document capture solution couldn't handle the current volume of scanning and OCR requirements—up to three million pages per month, many of them multipage documents requiring additional attention to sufficiently scan and store. Their current scan solution was bogged down, which meant the client's productivity was negatively affected due to an enormous backlog of time-sensitive documents for tax clients.

AccuRoute integrated with existing HP devices to get the job done.

AccuRoute integrated with the firm's new HP devices, which were specifically chosen to work in conjunction with the platform. These MFPs replaced traditional fax machines, greatly reducing redundancy and cost. 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 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."

– Chief Technologist
Global Accounting Firm



Secure fax communications increased efficiency while protecting sensitive data.

Another busy tax season was on the horizon.

The firm needed a comprehensive, scalable solution for automating its fax, scan, and document distribution processes. They wanted 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 client also needed to consider the over 12,000 users who regularly scan and OCR large volumes of multi-page documents on approximately 1,000 HP devices across 28+ US-based offices. The solution had to be simple to deploy with a user-friendly interface that promoted quick user adoption.

In anticipation of the upcoming tax season, the accounting firm fully implemented AccuRoute within six weeks of signing the agreement.

After implementation, everything changed.

Upon deploying AccuRoute, the firm quickly achieved a significant and measurable return on investment, immediately reducing costs around printing (i.e., 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 benefited 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



Compliant processes and a better user experience were achieved with AccuRoute.

Integration with existing devices was crucial.

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.

Today, the firm captures and processes their tax documents with AccuRoute's multi-tiered solution through network-enabled HP devices. This solution dramatically reduced costs and accelerated project times by allowing users to deliver electronic images of documents from any of the 28+ 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.

With AccuRoute, the firm can 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.

Finally, the firm can rest easy knowing that with AccuRoute, all documents and data have been securely scanned and transmitted to ensure the protection of their clients' confidential data while adhering to corporate and government regulatory obligations for auditing purposes.

Upland AccuRoute helps organizations accelerate business processes by allowing users to easily capture, process, deliver, and fax content from any device using a single, unified platform. AccuRoute automates data capture and extraction using optical character recognition (OCR) to securely process through workflows to applications, people, or storage.

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For more information visit: uplandsoftware.com/AccuRoute