

Ekaru

Connecting People With Technology



Technology Workshop Stop the Insanity and Go Paperless in 2011 !

March 17, 2011
Lunch & Learn Webinar

Microsoft®
Small Business
Specialist

Microsoft®
CERTIFIED
Partner



Happy
St. Patrick's
Day !

Welcome!

- Thank you for joining us today.
- In today's call we'll talk about what you need to **Go Paperless**. The call will last approximately 35-45 minutes
- If you want to follow from your office, go to www.ekaru.com / Go to "What's New" near the bottom of the page. Presentation will open in a browser, click the down arrow in nav bar to advance slides.

Format

- This is a “listen only” voice call.
 - (Reason, cut down on ambient noise, avoid “call on hold music” – a bit tough though, because I can’t hear you!)
- If you have questions, please eMail to info@ekaru.com and we will try to include Q&A at the end of the call – we will be reviewing email live during the call.
- Call 978-692-4200 for help.



Workshop Mission

- Help you get more from the technology you already have.
- Introduce you to new technologies you need to know about.

Overview

■ Stop the Insanity and Go Paperless in 2011 !

- ✓ *Why the urgency?*
- ✓ *What does the IRS require for electronic documentation?*
- ✓ *How do you select the right scanner?*
- ✓ *How do you set up a file name system?*
- ✓ *How can you use Outlook Tasks to stay organized?*

Ask Questions: info@ekaru.com

Action Time!

- *The Cobbler's Children Have No Shoes...*
 - We've helped many offices go paperless but our own system was out of control.
 - Needed another file cabinet (or a crow bar to squeeze in more files!).
 - Files getting behind...
 - Why print and keep what we don't need?
 - Get organized! - Time management studies – how much time is wasted looking for things?

IRS Guidelines for Electronic Documents

- The IRS has specific requirements for record keeping in a business – *check in with your accountant for details.*
- The IRS has been accepting electronic documents as far back as 1997.
- For full details, reference IRS Bulletin 1997-13 <http://www.irs.gov/pub/irs-irbs/irb97-13.pdf> (Rev Proc 97-22).
- The full document is 36 pages, but the relevant parts for electronic records is covered in pages 9-11 so its not too much to read.

Electronic Storage System:

- "ensure an accurate and complete transfer of the hard copy or computerized books and records to an electronic storage media".
- "index, store, preserve, retrieve, and reproduce the electronically stored books and records".

Electronic Storage Systems

- Reasonable controls to insure integrity, accuracy and reliability
- Reasonable controls to prevent unauthorized creation of, addition to, alteration of, deterioration of electronic files
- Regular inspections – quality assurance program

Electronic Storage Systems..

- Retrieval system that includes an indexing system (you need to be able to find things!)
- Ability to reproduce legible and readable hardcopies
- Taxpayers records must provide support for the books – cross-referenced, etc.

File Naming Convention

- Create a game plan
- Keep it simple!

- Divide into Customers and Vendors
- Match names in QuickBooks
- Invoices are already stored in QuickBooks (and customer payment check #)

File Naming...

- Customers
 - Executed customer quotes, proposals:
Customer_Quote#_INV#_MM_DD_YYYY
 - We don't keep a paper copy of the invoice.

File Naming

- Vendors:
 - Scan bills
 - Invoices: Vendor_MM_DD_YYYY _INV#
 - Shred after scanning

- Cross reference to QuickBooks (INV #, Date, Name)

How to select the right scanner

- You'll need a scanner to get your paper documents into your electronic filing system.
- Prices and features vary – here are some things to know.



Scanner Selection

- **Flatbed vs Document Handler.** Decide what kind of scanner you need. Flatbed scanners have a glass plate and a lid, and document handlers have a feeder mechanism to load the paper, many sheets at time. Many scanners have both capabilities.

Scanner Selection

- **Speed.** Look for how many pages per minute the scanner can handle. You'll pay more for faster scanners, but if you plan to work with large volumes of paper, you'll need the speed.
- **One-sided vs Two-sided.** Can the scanner handle two-sided scanning or do you need to scan the back of pages separately? This is also referred to as simplex vs duplex.

Scanner Selection

- **Print / Copy / Fax?** Does the scanner need to perform these other functions? In many cases, the best solution is a dedicated scanner, but if you have tight space in your office, you may want to look for a combination unit. If you're looking for a multifunction unit, consider if you need color printing.

Scanner Selection

- **Maximum Paper Size.** What is the largest paper size you need to handle? Look for the maximum paper size - standard letter size (8.5"x11"), legal (8.5"x14"), or larger sizes (11"x17").
- **Resolution.** Each scanner scans at a certain number of dots per inch (dpi). For regular documents, 600dpi is fine, but you may need higher resolution if you work with photos.

Scanner Selection

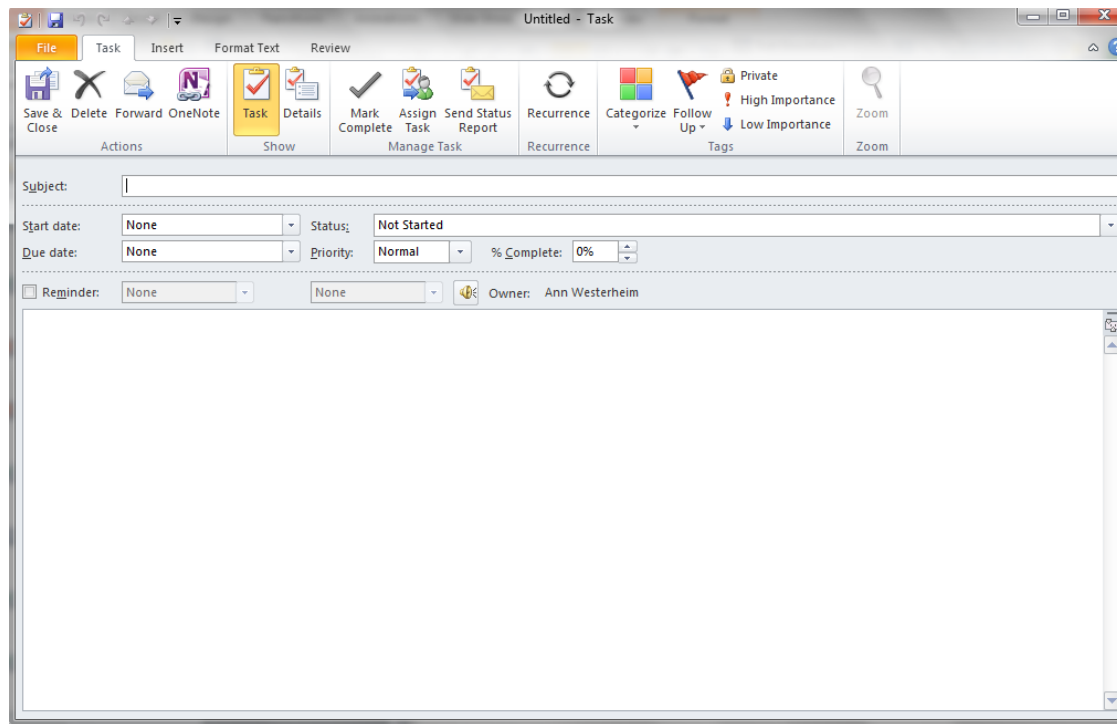
- **Network Connectivity.** Do you need just one computer to have access to the scanner or will you need networking capability to multiple computers?
- **Software Capabilities.** With optical recognition software the scanner can save a machine generated document as an Word or text file that you can later edit, saving a lot of time.

Outlook Tasks

- Keeping track of what needs to get done.
- AutoTask is our ticketing/CRM system but my desk was still filled with lists and post-its....
- New Years Resolutions – NO paper left on my desk ever!
- Switched to Outlook “Tasks”

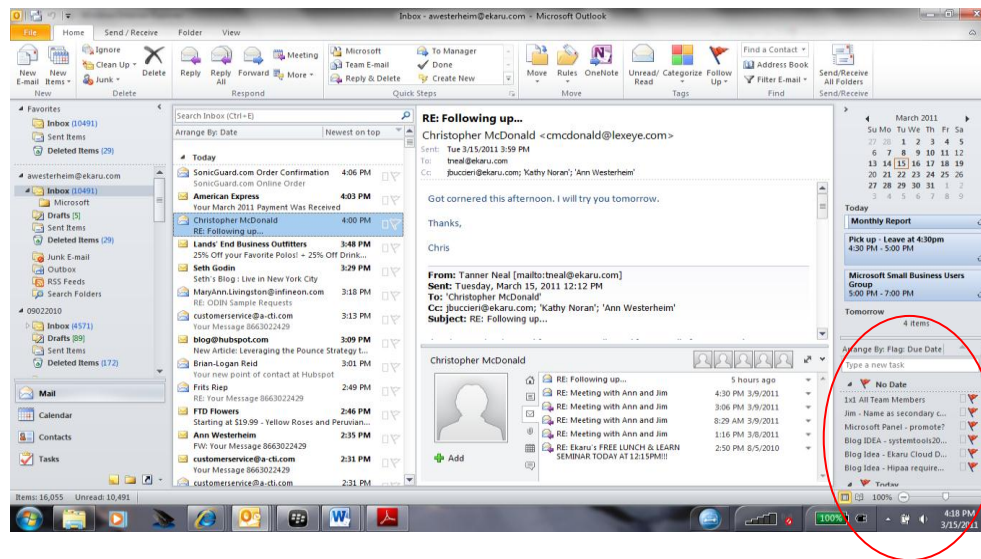
Microsoft Outlook "Tasks"

- Eliminate all "To Do" lists and post-its with Microsoft Outlook "Tasks"



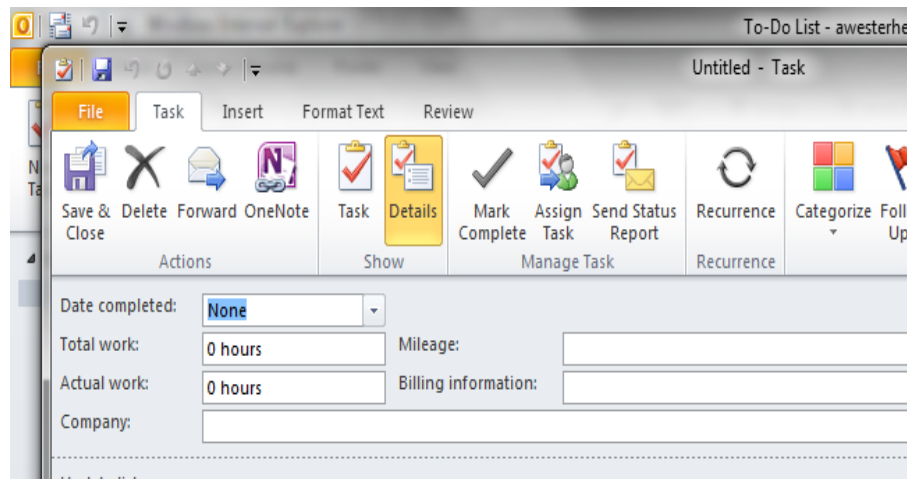
Tasks – Task Bar

- In Outlook 2010, go to "View", "To Do Bar", and check off "Task List". Your top "to dos" will be right in front of you all the time (if you want!).



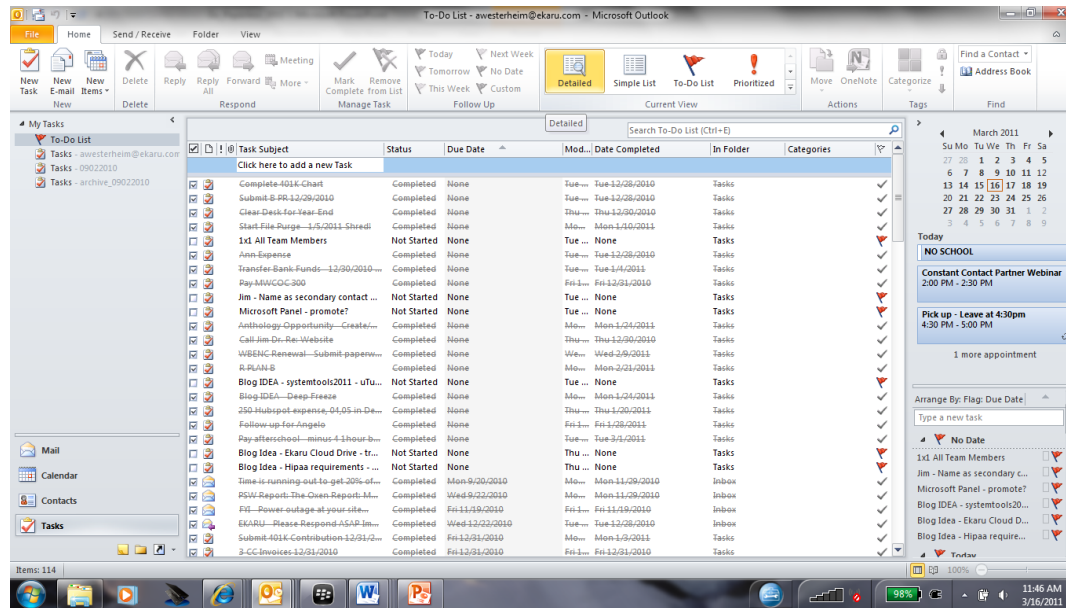
Outlook Tasks

- Track Billable Time and Mileage under “details”



Outlook Tasks

- Shift between "Detailed", "Simple List" and "To Do" list to find what works best for you.



Shredding Service

- We use DataShredder – mobile document shredding service
<http://www.datashredder.net/>
- Documents are shredded on site
- Video camera allows you to view actual shredding
- Certificate of destruction is provided.

Summary

- Review IRS electronic records requirements before creating your paperless plan
- Organization – what is your file naming system?
- Scanning – get the right scanner for your \$
- Outlook Tasks – explore ways to get more from the tools you already have!

Thank You!:

For more information:

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