Mengali Accountancy, a boutique accounting firm in Northern California, implemented DocuWare to streamline their work processes and become a paperless office.

Renee Mengali, President
Mengali Accountancy, Healdsburg, CA

"Implementing a self-serve information portal for our clients has saved us huge amounts of time. It was a benefit I was not anticipating, but one that has allowed us to effectively utilize our human resources and grow our business."

Location: USA
Industry: Service Provider
Deployment: On-Premises
Department: Company-wide

Mengali Accountancy, a boutique CPA firm, implemented DocuWare to streamline their work processes, improve fraud prevention and ultimately become a paperless office.

Paperless offices with faster workflows

In 2007, the accounting firm implemented DocuWare. Their goal was to provide their clients with a higher level of service by going paperless. Incoming documents were received via mail, then scanned and indexed in DocuWare. Using electronic stamps, documents were routed through a predefined workflow, speeding up work processes and eliminating the mundane tasks of filing and refiling paper documents.

They were able to divide their workload by task and client and match them to the skill set of each employee. The firm then assigned basic transactional processes to entry-level staff, thus freeing up senior accountants to address more complex tasks.

Seamless connections and transparent workflows between the firm and their clients

This forward-thinking accounting firm was soon ready to take its use of technology to the next level by providing clients with controlled access to their DocuWare system. Mengali implemented DocuWare Web Client which gave authorized (client) users seamless online access to information, without maintaining a DocuWare installation on a local PC. Today, their clients log into DocuWare from any location using a Web Browser.

Audits are less painful

Audits are now done remotely. The firm simply sets up each auditor with a secure login that allows access to only the documents they need to review. "The stress associated with audits is now far behind us," said Mengali.

Automated processes save man-hours and offer the ability to process 66% more documents

Mengali Accountancy wanted to continue to improve more of its workflows and add another layer of fraud protection for their clients. To do this they needed to add additional indexing criteria to new and existing documents already in DocuWare.

DocuWare's Intelligent Indexing Service automatically searches each document for relevant index terms and offers suggestions. The firm's DocuWare Coordinator confirms the suggested term or improves it by clicking on the information to be indexed. Using this feedback, the system learns to recognize document types and the next time a similar document is imported, the index terms are filled in automatically.

"When it comes to audits, DocuWare has saved my firm hundreds of hours formerly spent pulling documents."

"We are so happy with the flexibility and scalability of DocuWare and the support we get from our DocuWare Partner. The ability to re-engineer our workflow, add index criteria and keep all of our existing documents in the same structure is a huge benefit for us."

Mengali
ACCOUNTANCY

"I love the way DocuWare learns to auto plug information into our index fields, and if it misses something, all we have to do is click on the missing information. The best part of the new solution is that after the system has seen an invoice a few times, indexing is automatic," said Suzanne Witherell, DocuWare Coordinator for Mengali Accountancy.

Fraud prevention is key

"One of our clients had previously experienced internal fraud as the result of an employee editing PDF documents to be reimbursed at a higher rate. This alarming situation put document security and originality on the forefront and helped us illustrate to our customers the advantages and security that come from storing their documents in DocuWare," said Mengali.

The solution's workflow features allowed the firm to set up predesignated internal control systems, ensuring that at least three different staff members are involved with every client. Additional security features like predefined limits on which employees can access which information, uneditable original documents, and the ability to track and log each document's access are helping the firm prevent fraud.

"With the time we've gained since moving DocuWare online, we've really been able to continue focusing on best practices."

Discover more: docuware.com