

# ACCOUNTING PROFESSIONALS FIND SMARTSEARCH LESS TAXING, MORE PROFITABLE

## CASE STUDY



**BUSINESS:**  
Accounting Firm

**COMPANY:**  
Custom Professional  
Accounting

**OBJECTIVES:**  
Eliminate document  
storage bottlenecks and  
increase productivity

### For a busy accounting firm, SmartSearch subtracts bulky paper documents, multiplies efficiency dramatically and adds to profitability

Custom Professional Accounting had run out of storage space for its clients' paper records and turned to an electronic content management solution. The first solution the company tried, however, had some highly disconcerting "glitches." In contrast, the SmartSearch Content Management Suite from Square 9 Softworks proved to be affordable, easy to use and extremely reliable—increasing the efficiency of the firm's seasoned accounting pros by 35 to 45 percent, while literally shredding its document storage requirements by about 90 percent.

Founded in 1993, Marion, Ohio-based Custom Professional Accounting offers accounting, payroll and tax services for businesses and personal income tax preparation. The firm's experienced staff takes pride in providing a high level of personal service for a wide variety of clients. "Our name says it all," said Sue DeVaughn, the firm's office manager. "We customize our services for each individual business. For many of our clients, we do everything—from accounting to payroll to tax preparation; for others, we provide only those services they need."

After many successful years in business, however, the firm needed to find a better way to manage its clients' records. "It was obvious that our paper storage situation had gotten completely out of hand," DeVaughn noted. "We needed to find an affordable way to access records more quickly and operate more efficiently."

Before moving to its current location, Custom Professional Accounting had operated out of a converted supermarket. The storage boxes holding the firm's documents were stacked five high on top of five-drawer filing cabinets—right up to the old building's very high ceilings. "It was extremely difficult and time consuming—to say the least—if you needed a client's tax return or Form 941 and it just happened to be in the bottom box!" DeVaughn recalled with a laugh. Eventually, the company was forced to acquire an exterior storage unit, but that merely moved the problem off site.

When Custom Professional Accounting began looking for remedies, however, it discovered that many solutions were too expensive or, if affordable, did not perform adequately. "The first solution we used had some serious glitches," DeVaughn explained. "When you have to rescan a document four or five times to get it into the system, you get frustrated!" The firm's office technology company then recommended and installed SmartSearch to resolve these chronic problems.



## ABOUT SQUARE 9 SOFTWARES

Square 9 Softworks is a leading developer of innovative, business-centric software solutions including the award-winning SmartSearch Content Management Suite. Dedicated to making content management available to organizations of all sizes, Square 9 Softworks designs solutions built on open architecture and cutting-edge technologies that drive efficiency and productivity across all business applications.

Through decades of experience with content management technologies in business enterprises of all kinds, Square 9 Softworks has acquired a thorough understanding of document-driven business processes. Intensely customer-focused and highly responsive, the company delivers effective, value-driven solutions and has achieved a reputation for excellence in meeting the rapidly evolving needs of its customers.

Square 9 Softworks distributes its solutions exclusively through a network of highly skilled channel partners from its corporate office in New Haven, Connecticut. For further information, visit [www.square-9.com](http://www.square-9.com)

"From the beginning," DeVaughn said, "we found SmartSearch to be an affordable, easy to use and extremely reliable solution. It completely eliminated the problems we had been encountering. We were pleased that the transition to SmartSearch went so smoothly and delighted to find that SmartSearch is easy to learn, too. Even the few 'computer-challenged' employees we have here got the hang of it very quickly."

Prior to adopting SmartSearch, the firm stored clients' records in expandable folders and all forms or documents were copied and placed within the folders by hand. Payroll clients' folders, for example, might include paper copies of Form 940s and Form 941s, as well as state and city unemployment and workers compensation filings, and tax clients' folders might contain Form W-2s and stock transaction and mortgage interest forms.

"Since transitioning to SmartSearch," DeVaughn said, "we no longer keep paper copies, except in unusual circumstances. Now, as forms are prepared, we make a single paper copy of each. We scan the client's originals to capture them in SmartSearch and then give the paper copies to the client. The original forms get filed with the IRS or another entity. Working from originals means there are fewer opportunities for errors." One part-time employee has been assigned to do all of the scanning during tax season and busy quarterly filing periods; at other times, DeVaughn and the staff do this as needed.

What impact has SmartSearch had on Custom Professional Accounting's bottom line? "Since we began using SmartSearch," DeVaughn said, "I estimate that our staff is between 35 to 45 percent more efficient. We're using about half as much paper as we had been, and we're consuming less ink for our printer, too. Obviously, this solution pays for itself very quickly." The firm is now using SmartSearch to help manage many of its own internal business processes as well.

After converting to SmartSearch, Custom Professional Accounting identified documents that could be destroyed and had them shredded. Those remaining are now conveniently stored in a designated room in the building's basement. DeVaughn estimates that SmartSearch has eliminated about 90 percent of the firm's stored paper and storage space requirements and "100 percent" of its offsite storage facilities.

"Everybody here just loves SmartSearch," DeVaughn exclaimed. "It's so easy to use, it's very affordable and it's easy to learn, too. If you're trying to get into the 21st century, paper is just not the way to go. I would strongly recommend SmartSearch to others—and I have!"