

## CPA Gets One Step Closer to Paperless

**Synopsis:**

Denver-based CPA uses ABBYY FineReader optical character recognition (OCR) solution to convert paper-based files into searchable electronic files easily and efficiently. Saving an average of about 125 hours in searching documents, more than three work weeks, annually; this translates to conserving thousands of dollars. Going paper-less has increased productivity and customer satisfaction while preserving office space.

**Client:**

David Kauffmann, CPA; owner of Denver Tax Software, Inc.

**Location:** Denver, Colorado

**Industry:** Accounting/Finance

**Document Type:**

Deposit slips, vendor invoices, signed tax returns (W-2, 1099 forms); contracts, insurance agreements, and other business documents

**Business Goal:**

Create paperless environment to reduce search time and increase productivity

**Product of Use:**

ABBYY FineReader 8.0 Professional Edition

**Web Site:**

<http://kauffmann-cpa.com/> or  
<http://www.denvertax.com/paperless-filing/>

***ABBYY FineReader Boosts Productivity for Denver Tax Software***

In 2004, David Kaufmann added accounting services to the menu of offerings from Denver Tax Software, his tax software company. After putting up his Certified Public Accountant (CPA) shingle, though, Kaufmann quickly realized that keeping his paperwork straight was harder than keeping his figures straight. Fortunately, combined with an affordable scanner, ABBYY FineReader optical character recognition (OCR) software marshaled his paper-based files into digital orderliness quickly and easily.

"It became a no-brainer to go paperless," said Kaufmann who is based in Centennial, Colo. "Plus, I had decided it was time to provide my software customers with a step-by-step approach for creating a paperless office. How can I be an expert in paperless office concepts if my own business isn't paperless?"

After doing some research, the CPA identified ABBYY FineReader as the right choice for his company. "I saw that it was competitively priced, and, from my Internet newsgroup, we found that competitive products were not terribly well appreciated by users, especially when it came to technical support issues," said Kaufmann. "ABBYY got great reviews."

A quick download of a 15-day free trial version of the software allowed Kaufmann to test the software thoroughly. After realizing that the software translated his documents with near-perfect accuracy, he decided to standardize on the software for his OCR needs.

To get started, Kaufmann began converting his filing cabinets into a searchable digital storehouse. "I basically walked over to the file drawers and started writing down the folder labels, and then I walked over to the computer and used Windows Explorer to create the same file folders," said Kaufmann, adding that since most data in his practice should be destroyed after a set period of time he decided to allow his paperless office evolve rather than taking time to convert all of his existing files.

Now, Kaufmann takes the paper coming into his office and scans using his sheet fed scanner, then he uses FineReader OCR to create a searchable PDF file and files it in the appropriate folder. For his software company, he processes a wide range of document types, including deposit slips, vendor invoices, signed tax returns, contracts, insurance agreements, and other business documents. Meanwhile, as an accountant, Kaufmann needs to track client documents and tax forms such as W-2 and 1099 forms and IRS notices. The resulting files are both editable and searchable, making them simple to find and reuse. In addition, the PDF format makes sending documents to clients as simple as sending an email.

Prior to using FineReader, Kaufmann's office was packed with three four-drawer legal-size filing cabinets. However, as he converts more and more incoming information into a digital format, his need for storage is shrinking. "I still have traditional files that are paper-based but those are getting smaller and smaller," said Kaufmann. "Meanwhile, my paperless office is getting larger — but it still doesn't take up too much room on my hard drive!"

As a three-person operation, there's often more work to do than there are people to do it. Now, though, FineReader saves him lots of time when he needs to put his hands on a specific piece of information, either for himself or for a client. "In 2003, I had a knee brace for a couple of weeks and got charged for it, but I kept the receipt," he said, "Last year, in 2006, I got a letter and a bill for \$200 saying insurance didn't cover it. I merely went into my search software and put in the name of the vendor and the total dollar amount and in an instant I got the insurance record that said I had paid for it."

Similarly, the software lets him serve his clients better. "Now, if a client calls me to ask a question about something, I can search for the item and give them an answer while I am on the phone," said Kaufmann. "When I had nothing but the traditional paper, I would have had to call them back later. Sometimes, I would search and not find things. I wasted untold time looking through paper... and making clients wait."

Before implement FineReader, Kaufmann spent hours each week searching for the documents he needed. Kaufmann estimates that, now that his documents are archived in a searchable format, he saves anywhere from 20 to 40 minutes of search time each day — or an average of about 125 hours, more than three work weeks, annually. "There was a time investment to begin with to create the system, but the farther you go with it, the more time you save," he added.

For Kaufmann, the paperless office concept adds up to substantial time savings and increased customer satisfaction that have him touting it to all of his software customers.