

ACUMON

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Sally Young, Office Administration Manager

THE CLIENT

Acumon is an accountancy and business advisory firm that offers personal and company services across taxation, business planning, cash-flow management, wealth creation, retirement, superannuation, business succession planning and so on.

Established in 1990, the two-partner business has offices at East Maitland and Morisset, in NSW’s Newcastle and Hunter region, with staff servicing customers Australia wide.



THE CHALLENGE

Acumon had an ageing multifunctional device (MFD) at each office, one owned and one rented, which it wanted to update.

Already scanning most documents, they wanted to further improve the efficiency of their scanning-process to reduce manual labour - estimated at 60 hours a week - to scan, rename and file PDFs to their business accounting and document-management platforms.

Acumon wanted an automated system that would integrate with the business applications they use to manage client information and data, including SharePoint, XeroCloud, Harmon. ie, Workflow Max and SuiteFiles.

THE SOLUTION

As well as updating both MFDs to an ApeosPort VC 4475 Booklet & Staple Finisher, Viatek recommended a scanning solution that could work seamlessly to output named files directly to an archive folder or SharePoint.

Going from up to a 20- step process down to just two, documents are now manually loaded to the MFD, which then automatically processes them, captures the required information and outputs a renamed PDF to Acumon’s SharePoint platform. The solution works via a cover sheet for each document; staff tick the appropriate boxes (e.g., income tax data, Notice of Assessment, and so on), and then scanned, renamed PDF is automatically filed to the correct folder. This reduces manual activity to simply completing the coversheet and loading documents to be scanned into the device.

As well as scanning to the new document management system, staff can also choose to scan documents to email or the network. All scanning is at high speed. Scan templates have been set up for common jobs, and documents can be scanned double-sided, single pass at up to 160 pages a minute in black and white or colour.

Viatek’s adaptable scanning solution is also like a “toolbox”, allowing Acumon to add additional workflows over time for various other business applications, as needed.

The monthly-fixed-cost managed service agreement includes hardware, software, print support and software support, while also simplifying paperwork and contact to a single supplier.



THE RESULT

The automated scanning solution has reduced the time staff spend on scanning and filing documents by 95% - saving \$1,700 a week in labour spent on this task.

Sally Young, Acumon's Office Administration Manager, says not having to rename scanned documents and then physically direct a PDF to the right folder has contributed to much of that time and dollar saving. For instance, a person's Notice of Assessment for tax will be filed in their named folder, under the correct year, which also makes it much easier and quicker to find documents.



"We just don't need to touch files at all now. We were scanning before, which is good for storing documents, but it was very time-consuming. Plus, files waiting to be scanned could build up very quickly if people needed to do other jobs. Staff scan their own documents now, rather than it being delegated to one person as their job for a day-and-a-half, so documents no longer sit in a pile.

"Even the time a document takes to scan is much quicker. It's set up so that documents we need straightaway will go through immediately, whereas those that aren't urgent upload and go through overnight."

Sally says Acumon had been inclined to stick with the type of equipment it had previously, with the thought they knew what they needed it to do, being just print, copy, fax and scan.

"We spoke with several other providers who just matched what we were asking for two new multifunctional systems. But Viatek really thought outside the box and gave us options that we hadn't come across, or thought about. For us, that was the biggest thing, really: Viatek gave us a solution that has vastly improved our business's efficiency.

"The cost of the hardware was comparable to the others, but Viatek's after-sales service has been great: it's much better than other companies that we've dealt with previously where you're put in a queue, and it takes a couple of days for someone to help you, Viatek is straight on to it."



acumon⁹
accountants and business advisors.

We talked to quite a few providers who were happy to give us what we asked for, but they weren't improving on it. Viatek gave us all these other options, which opened up a lot more possibilities than we had thought of. None of the others did that. They also didn't have the checkbox solution for automated document management, which has freed up at least 60 hours a week for staff to do other, more profitable activities for our business.

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