

Advantages of the 'Paperless Office'

1. Obviously **less paper, less manual files and less documents** to lose, misplace, fumble through, file, misfile, mail, store in filing cabinets, archive, bin, clean up after, search for later and worry about.
2. **Massive savings** in time spent handling client files, during appointments, mailing and general office procedures. No files to handle after the appointment either as there are no papers left to worry about.
3. Much **quicker appointments**, particularly individual returns done on the spot, where you can 'tab' back and forth between the current year being worked on and last years electronic copy for comparison.
Impresses the hell out of clients. For business clients the ability to call up any years accounts on the spot saves time and looks great.
4. **Less stress and worry around the office** about who put what where. Actually gives a positive feeling amongst the team about being up to date with technology, and ahead of the rest. No stress immediately before an appointment about where the file is and has everything been filed in it that needed to be.
5. Much **more available space** around the office due to lack of filing cabinets needed, less space required for work in progress, etc. Also leads to **savings in rent payments** as less space is needed.
6. I also believe it has **large savings in wages**, as we appear to be, in comparison to others, at least one, if not more, employees less than they need. This comes from faster appointments so less accountants need across the client base, and less administrative staff needed for filing etc.
7. Inward and outward **mail procedures are faster and simpler** as there is not only less to handle but scanning copies of correspondence into client files happens immediately and is basically foolproof.
8. **More accuracy of filing** as the person doing the job does the scanning and knows where everything should go, year by year.
9. Information and **file retrieval is much faster** for answering client queries such as copies of accounts for the bank, copies of tax returns etc., as everyone in the office knows where to find things. Also, importantly, **everyone has access to the client files at all times(No hoarding of files by partners)**. Files can then be attached to emails or sent straight to fax for sending anywhere at the push of a few buttons.
10. Filing is **more orderly** as each client has a folder for each financial year and it is very easy to find information from many years ago. Finding information from 5 –10 years ago is no more difficult than finding last years information. This was always a huge problem with paper files.
11. This system works best with a **technologically up to date office**. The use of external email, internal email or messaging, clients sending information via fax, disk or email, the use of other software with PDF features allows all relevant information to be saved in the client file instantly. **It's about much more than just the paper!!**

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