



ALCALA Consulting, Inc. Helps Accounting Firm Go Paperless System Allows Clients to Access Tax Information Online

Challenge:

- Wanted to improve service and support on Laserfiche system
- Needed a system that would allow customers to access tax returns electronically

Solution:

- Hired ALCALA Consulting, Inc.

Results:

- The efficiency of a paperless office
- 24/7 system service and support

Hinton, Kreditor & Gronroos, LLP, is an accounting and consulting resource to middle market businesses. The firm's clients range in size from local, family owned businesses to companies with operations throughout the United States. Personal, family and estate tax planning comprise a significant portion of the firm's business, which led to the decision to purchase Laserfiche® document management software.

"We bought the software, but then we were unhappy with the people that were servicing the system," recalls Office Manager Laurie Sheridan. "We knew about Marco Alcala through another company and called to see if he could help. He did, so we switched over to ALCALA Consulting."

With the confidence instilled by ALCALA's 24/7 service and support, Hinton, Kreditor & Gronroos was able to complete the task of scanning every client document and tax return into Laserfiche, completely eliminating the need to keep paper copies on file. When it was necessary, ALCALA upgraded the office's system to handle an unlimited amount of stored documents.

"We now have more than one million images in the system," Sheridan said. "The only papers we still have are documents we haven't yet scanned and returned to our clients."

In 2002, ALCALA helped the CPA firm further upgrade their technological capabilities by adding a website where clients could access their tax returns. "It took some special hardware to implement, and ALCALA did an awesome job. Now our clients don't have to call us when they need their W2s, they can just go on the secure site, use a unique login and print out their return, or email it if needed. It's much more convenient for them and for us," Sheridan said.

Any tech concerns are handled quickly, usually without the need for a service call. When an onsite fix is required, Sheridan reports that an ALCALA technician usually arrives within one hour.

"I have nothing but great things to say about ALCALA Consulting," Sheridan raves. "Whenever we've had a problem they come right over and take care of it. Their service has always been excellent."

