Digital Document Management
since 1984

DOCTECH
Document Management Technology Ltd

Wettone Matthews Case Study
Chartered Certified Accountants

Client Profile

Wettone Matthews provide a complete range of accountancy services; Business Start up Advice, HMRC rules, Tax Returns, Payroll, Capital Gains Tax and more. Founded over 50 years ago, when Partners Tim Wettone and Barbara Matthews joined the firm they changed the name to Wettone Matthews. They are now both retired but the current directors have kept the name and intend to continue with the same level of service. Wettone Matthews pride themselves on delivering a tailored yet consistently professional service to their clients.

Industry: Financial Services

Departments: Company Wide

Location: Alton, Hampshire

WETTONE MATTHEWS
CHARTERED CERTIFIED ACCOUNTANTS

Background

The Directors at Wettone Matthews realised they needed to make a change to the way they worked when in 2006, they assessed the sheer volume of paper created and stored. Filling cabinets were stacking up in an increasingly damp cellar and storage space was becoming a problem.

Prior to utilising DocTech's solutions, the internal document processing involved handling a lot of paper. When a letter was received, it was actioned and filed. For any out going post, a carbon copy was created using a colour coded system—this was also filed. Blue for information sent to a client, pink for Inland Revenue and green for outgoing invoices. Copies of anything else sent were also filed. When the folder got too big, a new one would be created.

As a management team knowledgeable in IT systems, they sought a solution provider to help them tackle the ever growing volume of paper files.

Challenges Faced

One of the biggest challenges faced by Wettone Matthews was moving from paper to electronic files, due to the large number of documents held on site. Some weeks, the firm could be processing up to 1,000 documents, with the busier months of December and January receiving three times as many. With their clients often submitting tax returns close to the deadline, staff at Wettone Matthews face high seasonal spikes in the forms they have to process. Next came the decision to decide which documents would be submitted to DocuWare to begin with, and what would be kept in separate permanent hard copy files.

Selby Gray, Tax and IT Manager of 36 years describes the initial resistance; *"The adoption of a new system was something staff had to get their heads around. You get used to one way of working for so long, that it almost becomes the only way of doing things. Individual members of staff would spend up to an hour a day filing; time that we realised could be better spent elsewhere."* This resistance was quickly replaced by appreciation as staff soon realised the value in the time they gained.

One area that also needed some attention were emails. When a Director retired, a solution was needed to securely archive the 3000+ emails he had stored in Outlook. These emails were highly sensitive and contained information that needed to be accessed by the rest of the business.

Objectives

- Reduce the reliance on paper files
- Create a simple, digital repository for all documents
- Free up storage space in the cellar
- An easier way to process tax returns
- A more efficient way of naming and storing documents
- To stop printing emails and storing them manually
- Ensure certain documents are only accessible by the Directors.

DocTech Solution

Wettone Matthews had a variety of document types they needed to store: letters, emails, the occasional fax, copies of tax returns, back up schedules and copies of accounts. DocTech technical staff sat with employees and mapped their processes to fully understand how the business worked, and how their paper processes could be digitally replicated/improved. A simple storage solution with easy access was needed, along side a way to easily file away emails.

It was decided everything would be scanned and stored in DocuWare. Index Field names were decided; the file criteria to be associated with each document for easy searching. These can be anything to recall a document; document type, reference number, clients etc. These were all bespoke and can be updated if needed at the clients request.

Three digital filing cabinets were created. The purchase invoice cabinet is the biggest of them all, digital stamps from within the system are used for approvals. Out going letters are passed to the Director for approval, digitally stamped, sent and then filed.

DocTech Solution

"Documents are now easy to find, everything's in chronological order and easily accessible to everyone" explains Selby. *"There is a private filing cabinet for confidential information that only the Directors have access to, as well as a client one. Any work we create is 'printed to DocuWare', which files it straight into the system. When HMRC come in, it's all so easy as everything is online ready for them to see".*

DocTech also implemented 'Connect to Outlook', a module of DocuWare that allows users to store emails into the system from within Outlook or Office 365. Users are given the option to store the email, attachment or both. These are indexed, saved and searchable in DocuWare the same as any other document. *"Connect to Outlook has saved so much time"* said Selby *"when we found the 3000+ emails a retired colleague had in his inbox, we were glad we had the functionality to easily file them away."*

Modules in Use

- **Connect to Outlook**
- **Barcodes and Forms**



The Benefits

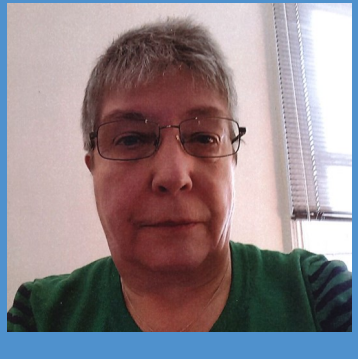
All 17 staff at Wettone Matthews use DocuWare, and once they decided they were going digital, the transition was "*pretty painless*" said Selby. There are no longer heavy files to carry around, and no documents getting damp in the cellar.

The biggest benefit staff have found is the accessibility of information across the office. Using DocuWare to house all their business data in once place means everyone knows where to look. Documents can only be saved under strict naming conventions, so no one document type, can be named in different ways. In Wettone Matthew's case, everything is filed under client reference numbers that are manually added on entry in to DocuWare. To find all documents relating to a specific client, they simply type the reference number into DocuWare's index field, and all documents appear. There is no longer a need to have a network file structure, as a simple search is all that's needed.

Despite going digital, Wettone Matthews still process paper, which is fine as this is their business requirement. With many elderly clients, they receive large numbers of tax returns by post. These are simply scanned in, placed in the digital tray of whoever needs to action them, then filed in DocuWare. A confidential waste box keeps the paper until it has been dealt with and it is then shredded.

Selby Gray, Tax and IT Manager summarised:

"All paper has now gone! We still have some historical documents we occasionally need to refer to and when we do, they are scanned into the digital cabinet and then destroyed. The biggest benefits of implementing DocuWare is the accessibility of information across the office, saving on storage space and saving some trees! The ease of use, and the support from DocTech is very good."



About Document Management

A document management system (DMS) is a way of digitising and storing business documents and any process associated with them. Paper documents can be scanned then stored electronically, alongside those already being produced and distributed electronically.

All businesses deal with documents day in day out. Invoices, purchase orders, new starter forms, drawings, company policies etc. The average employee spends as little as 60% of their time on productive work. The other 40% is taken up looking through e-mails, papers, shared drives and folders. Every business is looking to increase efficiency and reduce costs. This is where a DMS can help. Document management can:

- Store documents straight from email for processing
- Automate tasks
- Integrate with finance, ERP, CRM or HR software
- Facilitate mobile access to data
- Reduce manual work - scanned data can be automatically populated to any system
- Provide secure and compliant access to your information
- Cut printing and associated costs
- Offer version control, audit trails and help with GDPR compliance
- Assist with digital forms and ticketing systems
- Provide bespoke user access

About DocTech

DocTech is a leading provider of document management technologies and services, with clients throughout the UK and Ireland, varying in industry type, size and requirement.

DocTech's solutions provide organisations with the ability to collaborate on shared documents. To store, share and manage documents from one central location. This speeds up retrieval times whilst maintaining high levels of security. It ensures maximum compliance with industry and government regulations. DocTech solutions have enabled hundreds of companies to improve their business process performance, saving valuable time, money and staff costs.

DocTech can help you evaluate your current document management situation and related costs, assess your needs and develop bespoke solutions that support your business goals.

In house qualified IT Engineers and System Architects, are all at hand to offer technical consultancy to assist with specific system operations. DocTech offer advice on all matters relating to document and data processes.

For further information on how DocTech can add value to your business, please contact a member of the sales team on 0161 667 3390 or email info@doctech.co.uk

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