

INVU: HASLERS CASE STUDY

KEY BENEFITS

Easy to install & use

Powerful & flexible Workflow

Infallible audit trail resolves
Compliances issues

Integration with existing CRM

Substantial reduction of
paper filing

Increased efficiency

Increased productivity

"Already we are seeing significant operational and productivity gains with a reduction in paper manual processes, which promises to be a great return on investment for us."

Simon Davies, Business
Development Manager, Haslers

LEADING CHARTERED ACCOUNTANTS, HASLERS, STREAMLINE PROCESSES WITH INVU'S ELECTRONIC DOCUMENT MANAGEMENT SYSTEM

Invu's electronic document management solution has been purchased by one of the UK's top Chartered Accountancy firms, Haslers, to give their staff easier and faster access to those documents that are critical for their job.

The system, developed by Invu, was installed at Haslers by one of Invu's integration partners, Scan Worx. It allows Haslers to scan important documents, such as policy documents, tax forms and invoices onto their system, ready to be retrieved when needed through Invu's indexed search and retrieval mechanism.

"We have over 80 staff including eleven partners," comments Simon Davies, Business Development Manager at Haslers. "We are a dynamic, modern, progressive firm which is growing rapidly. Space was at a premium so we needed a solution to streamline our office efficiencies, Invu's software has enabled us to achieve this goal. Already we are seeing significant operational and productivity gains with a reduction in paper manual processes, which promises to be a great return on investment for us."

"This is a great showcase for Haslers and Scan Worx to demonstrate to the accountancy industry that document management can and will vastly improve the processes of accountancy firms," comments Alan Peck, integration consultant at Scan Worx. "We have installed a 100-user Invu solution in a couple of days with minimal disruption. The system is rolling out over six months and at each stage will add more and more functionality to the working practices of the forward thinking firm of Haslers." Scan Worx based in Cambridge are specialists at integrating Invu into accountancy firms and have implemented solutions from 5 to 100 users.

"Having an efficient electronic document management system integrated to your existing applications makes tremendous sense," adds Jon Halestrap, Director of Sales and Marketing at Invu. "We were able to provide Haslers with an effective method of keeping track and managing the critical documents for their business."

Invu integrates with Haslers other business applications effortlessly using the CodeFree Integration tool. Users can now view all documents scanned onto the system through the applications they use every day, thereby considerably

- increasing the speed and efficiency of document retrieval and cross-referencing.
- Quality is a very important factor in the operations at Haslers. They are a
- member firm of the UK 200 Group, the UK's foremost accountancy group
- to the business sector and have achieved accreditation to ISO 9001 and
- Investors in People. The installation of Invu for document management at
- Haslers will help maintain the firms leading edge in quality standards and
- keep them ahead of the competition.
- The firm has also recently implemented a disaster recovery plan, which
- includes backing up all Haslers' data at an off-site location. Invu's system
- will help the company convert documents into an electronic form so they
- can more easily be sent offsite.

SORTED