



Automating repetitive processes helped Steer this practice in the right direction

Matthews Steer is a large accounting and business advising practice based in Essendon Fields in Victoria. With 5 Partners and 55 staff, the team at Matthews Steer were weighed down by their annual report collation processes, with technology continually crashing and creating clunky compilations.

When Matthews Steer decided to move from a windows file directory to a Virtual Cabinet filing system, implementing FuseDocs to automate their collation process at the same time helped them to completely streamline their processes, shaving up to 45 minutes off every single annual report collation.



**MATTHEWS
STEER** STORIES IN
NUMBERS



Location

Essendon Fields,
Victoria, AUS



Team Size

5 Partners, 55 team
members



Practice Management
APS



Document Management
Virtual Cabinet

Prior to implementing FuseDocs, the administration team would prepare all annual collations in paper, based off a “tick and flick” collation checklist provided by the accountant. Each document would be located and printed, the documents physically placed into the correct order, and a letter manually prepared and printed to accompany the report package collation. It was a cumbersome process, with their existing PDF collation solution continuously crashing and causing delays in finalising the collations.

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document
management
platforms**

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and professional
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business's branding**

**Automates a range of
repetitive processes**

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While many practices might be daunted by the thought of implementing two new software solutions at once, Matthews Steer saw the opportunity of automating their annual collations with FuseDocs to help them up skill during their transition from using a Windows file directory to Virtual Cabinet.

Their dedicated FuseDocs implementation consultant helped them to implement strong naming conventions and create a new collation checklist, as well as automating the preparation of a client personalised covering letter.

While Matthews Steer still provide many clients with paper copies of their collations, preparing these has never been easier. Thanks to FuseDocs they are now saving up to 45 minutes preparing each annual client collation and the team have since rolled FuseDocs out to automate their FBT and SMSF collations too!

“We’re loving all the work Matthews Steer and FuseWorks have been doing together (with FuseDocs) – it’s changing our world for the better every day!”

Kirsty Milligan

Senior Administrator (Team Leader)

“FuseDocs has helped the administrative team to streamline our processes and cut down our processing time dramatically. This has enabled us to focus our time on other areas of the business. The support has been incredible throughout the whole process from building our templates, making amendments, and also transitioning over to Virtual Cabinet. The (automated) Merge Letter & Checklist has been amazing... Adding this has been a life saver!”

Emily Bickford

Senior Client Service Administrator