



"Best Thing Since Sliced Bread"

The Superannuation Advisory Team at Vincents has now made FuseDocs part of their day-to-day lives by automating not only the collation process, but also and the creation of certain documents within the packs they put together for their clients.

Streamlining and automating these processes has shown significant cost savings, "Based on some rough calculations we estimate we will save \$50,000 per year by implementing FuseDocs" says Alexandra Plumb, Manager of the Superannuation Advisory Team at Vincents.

Before using FuseDocs, the process was very manual in putting together packs, by printing each document, compiling them in the right order manually, attaching sign here stickers, and then sending them to the client for signing. As the Self Managed Super Fund packs are quite large and complex, this process usually took the team 1-2 hours to complete this process.

The team has not only saved 30 minutes per collation by automating this process including the automatic placement of sign here stickers, the team also now uses FuseDocs to generate cover letters and a document outlining action items for the client. This action item document – sometimes up to 10 pages would take an accountant 1-1.5 hours to make sure all the right information is in there. With FuseDocs automating the document generation with standardised paragraphs and templates, they are saving 30 minutes putting this document together.

Not to mention the peace of mind of knowing the consistency in presentation and design of the document making it one less task that needs to be reviewed. "We know that by using FuseDocs the documents will be consistent and well presented, every time."

 VINCENTS

Location
Australia



Team Size
40 Directors, 240+
team members



Practice Management
APS



Document Management
HowNow



An example of the professional report packages FuseDocs generates for Vincents Chartered Accountants

When I first saw how FuseDocs works, I was immediately impressed – there was nothing really that couldn't be done, there was always a solution that could be found, or a fairly simple way to work around a task so that it could be automated. We now use FuseDocs to not only collate our documents but also to generate individual documents within the pack itself. We now save both the admin and the accounting team's time which combined is about an hour per collation process.

Alexandra Plumb
Manager, Superannuation Advisory



FuseDocs was implemented for the superannuation team in August 2019 but since the team started working remotely during the COVID-19 pandemic, it has become even clearer how becoming more electronic and efficient with the collation process has improved their business output dramatically. "In a time like this, the collation process becomes extremely important to get our work out – without FuseDocs, someone would have to still be in the office which would be incredibly inefficient in a time where we really need efficiency."

Moving to a more electronic method of communication with clients has helped enormously with managing work. Having a signing pack – which extracts just the pages the client needs to sign into it's own separate document – has meant that the overwhelm of a 200 page document for a client to work through is significantly reduced, and with very little additional effort by the administration and accounting team to create the additional signing pack.

By reducing the time required for producing collations for clients, the administration team has increased capacity and also been able to spend more time on other tasks such as managing the database, and doing extra follow ups with clients for the accounting team.

Visit our website to see FuseDocs in action and book a demonstration to learn more.

**Integrates with
leading practice
management &
document
management
platforms**

**Creates consistent
and professional
report packs
customised with your
business's branding**

**Automate a range of
repetitive processes**

**Free up time for work
that matters**