



Quality & consistent client outcomes

FuseDocs helped this NSW accounting business to unify their teams in multiple locations and enable them to produce consistent, quality client outcomes across offices with fully automated processes.

TJL Business Advisors and Accountants describe themselves as a one-stop-financial-shop for those living in the Manning-Great Lakes areas of NSW. With four partners and 29 staff split across two office locations in both Taree and Forster, TJL were facing challenges in implementing consistent processes and outcomes across the teams. Already focused on continuous improvement and eager to embrace new ways of working, we helped TJL to automate their report package collation processes, with team members now following the same processes and delivering consistent documents to clients regardless of their location or management team.



Location

Taree & Forster,
NSW, Australia



Team Size

4 Partners, 29 team
members



Practice Management
MYOB AE



Document Management
MYOB AE

Before using FuseDocs, accountants at TJL would give the client service team (CST) members a list of the entities they wanted an annual report collation prepared for. The CST would manually locate the various financial statements, tax returns, and other reports for each entity within MYOB AE, and physically print every document. These would be passed to the partner to apply a wet signature to the included compilation reports, reordered and then scanned back into the system as one file. A cover letter would also be prepared manually using a series of pre-written templates. This process could take upwards of 30 minutes for a smaller family group, and up to several hours for a larger group of entities.

Compile, format &
send client ready
documents at the
click of a button

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

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

**Automates a range of
repetitive processes**

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

FuseDocs has cut down the time we spend on collations by at least 50% at a bare minimum, and we're now saving so much time and money not having to print every single report pack to compile them. Both offices are now generating report packages using FuseDocs - all of our clients now receive consistent, properly branded documents regardless of their location.

Jessica Jugovac, Office Manager



Since implementing FuseDocs, the CST are now able to complete an entire collation in less than half the time. They use the FuseDocs and MYOB AE Integration to automatically identify the relevant entities within a family group and locate all of the applicable documents, reports, and statements that they need (that are already saved within MYOB AE).

FuseDocs compiles and formats their report package in a single click, automatically applying a stamp of the Director's signature to the compilation reports. A second file of pages the client is required to sign is also automatically generated, marked up with sign here stickers and tags.

These signature pages are generally uploaded to the client through the MYOB Portal, emailed, or printed if the client is coming in to the office. Now, this is generally the only printing needed!

Having implemented FuseDocs for their annual collations, the team at TJL are now looking forward to automating annual superannuation collations, as well as their Statement and Record of Advice collations in the future.

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