



## WOW - this is fantastic!

***Collations at this progressive SA accounting practice can now be prepared and published to clients in a matter of minutes.***

Spending hours collating annual client report packages for clients, this progressive accounting practice in Adelaide, South Australia was looking for ways to streamline their processes and better integrate their internal systems – so they could prepare and deliver professional documents to their clients quickly and consistently.

Using FuseDocs to automate their annual collation process, the team at Accru Harris Orchard have cut the time it takes to complete an annual client collation by over 65%.

Where they used to spend at least 45 minutes per family group (and up to hours for larger groups) locating, printing, converting and combining financials, tax returns, and other client reports; FuseDocs now integrates with their document management system, Virtual Cabinet, to completely automate the process.

FuseDocs automatically locates all the relevant documents for collation within Virtual Cabinet: formatting, ordering, and even applying electronic signatures to compilation reports to prepare a complete, branded professional reporting package.

FuseDocs even creates a hyperlinked table of contents and inserts onscreen bookmarks – making for a seamless experience for those clients viewing documents on devices.

**Accru<sup>+</sup>**  
Harris Orchard



Location  
Adelaide, South  
Australia, AUS



Team Size  
9 Directors, 41 team  
members

**APS**  
A SECTION PRODUCT

Practice Management  
APS Private Cloud



Document Management  
Virtual Cabinet



An example of the professional report packages FuseDocs generates for Accru Harris Orchard

Fusedocs has allowed us to improve our job collation process through efficiency and consistency, while providing the client with a more professional looking package, no matter how they choose to receive it.

Our support staff now have more time to devote to client services with the significant time saving we have been able to achieve. We can't wait for the next process to be tackled as the benefits from this one have been huge.



Ainsley Coggins  
Director  
Accru Harris Orchard

*We estimated that we would spend around 45 mins for an annual compliance send out but some of our groups can be quite large, so we could spend hours collating the documents. Now it takes a few minutes - up to 15 mins for the largest groups!*

*Our managing directors first reaction to a collated document was "WOW- this is fantastic"; other directors cannot believe that it only takes minutes to produce."*



**Ayzsa Gibbs, Client Services Co-Ordinator**

Having recently introduced the Virtual Cabinet Portal to distribute documents to their clients securely, Accru Harris Orchard now also use the powerful "Push to Portal" feature in FuseDocs. This allows them to compile reports and publish them directly to clients without needing to locate, extract, or publish documents from Virtual Cabinet to the Portal, completely automating several steps in their process and distributing documents to their clients quickly and easily.

**"It is now much easier to format the documents to send via the portal, we can easily add extra documents or exclude specific documents - which we couldn't do before. We are able to produce professional documents faster than we previously were able to, we are a fast-paced business and we are able to send out clients work more efficiently now."**

With FuseDocs streamlining and standardising their annual client collations, the team at Accru Harris Orchard are now looking forward to automating their superannuation fund compliance processes and even the preparation of standard letters – all of which they'll be able to easily upload to their Virtual Cabinet Portal and get to their clients sooner.

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