



Timothy Thurmon, CPA

Customer Success Story-Accounting

Timothy Thurmon is a Certified Public Accounting firm located in America’s heartland. With years of advanced training and extensive experience in finance and tax accounting, the firm has successfully served local clients and businesses throughout the Kansas City area. Now, with the implementation of a fully featured document management solution, Timothy Thurmon is streamlining the way that they handle the paper-intensive processes of a thriving CPA practice.

Located in an historic bank building, Thurmon’s staff began noticing just how much of their prime office space was occupied by paper files and cabinets. “We kept the first year or two in the safe where its fire proof. When it got full, we put it in boxes; then it was kept in the file room. When it got to be 15 years old we took it for shredding” said Kevin Thurmon, Business Manager.

“During tax season...we do 11 or 12 hundred returns in a short period of time. Questys really helps because we can just sit at a desk. We don’t have to worry about going to a filing cabinet. ”

Kevin L. Thurmon
Business Manager
Timothy Thurmon CPA

Seeing a need to be more efficient, they began looking at alternative systems for file organization. Originally they looked at a document management system offered through their tax system provider. “Their big system was more expensive, and more than what we wanted because it required a full-time server for itself. Questys was more well-rounded for everything that we do. The other system was geared to do just taxes. There was no way to get some of the other services we provide in it” stated Mr. Thurmon.

With their Questys system in place, Timothy Thurmon, CPA is now able to locate the information they need in seconds, saving precious time in serving their client base. “We store tax returns, all of our work papers and any supporting documents that a customer would give us. Some clients bring in their QuickBooks and we go through them and print out needed statements. Having Questys has put us at an advantage over those who don’t have it, as things are just easier” said Thurmon.

With Questys Document Management, Thurmon has also experienced a substantial increase in employee productivity. Transitioning from a standard filing system to an electronic paperless office has made their business run more effectively and efficiently. Less time is now spent searching through a room full of filing cabinets during the busy tax season. System users are now able to locate any document in any format at the click of a mouse, without ever having to leave their desks. Employees have the ability to scan documents into the system, organize their information and protect these valuable assets electronically. What’s more, system users have the ability to intelligently search for information via the actual content contained within these documents.

From the immediate elimination of office clutter to the added benefits of time, money, and paper savings, Questys Document Management gives businesses a significant increase in productivity, while providing a great return on investment.

Overview:

ORGANIZATION

Timothy Thurmon, CPA

LOCATION

Higginsville, MO

INDUSTRY

Accounting

NO. OF EMPLOYEES

3 using Questys

BUSINESS CHALLENGE

- Growing CPA firm faced with the challenge of reducing the physical space their files took up.

SOLUTION

- Questys Pro-brings the efficiencies, and cost benefits, associated with the paperless office, to small and midsize businesses.

RESULTS

- Searchable database has allowed employees quick access to the information they need.
- Improved employee productivity and efficiency levels.
- Simplified filing via system generated barcode cover pages for scanned documents and drag and drop functionality for electronic files.
- Ability to save directly from Microsoft office Outlook/Exchange, and other third-party business software applications.
- Index and/or full-text searches.

