



KONICA MINOLTA



KOFAX POWER PDF

ACCOUNTING FIRM STREAMLINES
PAPER PROCESSES

KOFAX 

Giving Shape to Ideas



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SUMMARY

Accounting firms traditionally deal in paper, and LeWalt Consulting Groupe, LLC is no different. The St. Petersburg, Florida-based firm, which handles sophisticated individual tax returns, as well as businesses, needed to be able to create, manipulate, and search PDF documents to serve its clients more efficiently and securely. Any PDF product it chose needed to have version control capabilities to ensure the documents' integrity, as well as e-signature features to allow clients to electronically sign documents.

To streamline information gathering, LeWalt Consulting Groupe needed the ability to create fillable forms for clients. The firm had created templates in Word, and being able to convert them to PDF as worksheets or pre-meeting intake questionnaires would save time for both them and their clients.

STRENGTHENING AN EXISTING RELATIONSHIP

LeWalt Consulting Groupe already was familiar with Kofax products; the company had been using previous PDF products, as well as OmniPage. Because LeWalt Consulting Groupe wanted to consolidate its PDF tools into one program, it began examining its options. Competitor solutions had an unpalatable price point and clunky interfaces, but LeWalt Consulting Groupe found exactly what it needed in Kofax Power PDF. It could

perform all the same functions as competing solutions, and it would allow users to do everything with PDFs that they were able to do with Word documents.

Additionally, Power PDF would give LeWalt Consulting Groupe signature features, as it was in the process of converting to electronic documents for tax returns. It was often a challenge to get documents back after signing, and this would allow clients to electronically sign their returns and send them back to LeWalt Consulting Groupe for filing.

"We used so many other Kofax programs that we said, 'let's try this one, too,'" recalled John Walters, Managing Member.

After two years with an earlier version of Power PDF, the firm made the decision to begin upgrading to the latest release. "It has more features and functionality, plus when I saw the video Kofax produced and how the ribbon is like Microsoft Office tools, it seemed like an even easier way to use the program," Walters said. Power PDF also came with a training video, which helped sway the firm in its purchasing decision



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SAVING COSTS AND TIME FOR BETTER CUSTOMER SERVICE

The biggest benefit for Borkosky is being able to meet and exceed the minimum standard of quality and format in documents that his customers and consulting engineers expect. The document assembly features and comment tools in Power PDF help produce great content.

“I think the interface for the document assembly and bookmark tools are easy to understand and work very quickly,” he said. “I can also say I have not had any issues with reliability or the integrity of the program—no crashes, no silly errors.”

Cost savings are also significant. If Borkosky had gone with another solution, over the course of the license of the software, he estimated that it could cost him four times as much. “Power PDF is functionally rich enough to meet the demands of my sales and engineering roles,” he said. “Because it is offered with a one-time license fee and priced reasonably, it was attractive to my small business.”

CHALLENGE

- Create fillable PDFs for client intakes
- Need searchable PDFs
- Protect PDFs with passwords

SOLUTION

- Kofax® Power PDF

RESULTS

- Time savings—50% less time to convert Word documents – Can take on more clients, and charge clients less money
- Ability to separate and combine PDF files with ease
- Can provide more efficient service to clients



“KOFAX POWER PDF IS A GREAT TOOL FOR WORKING WITH PDF FORMS, AND THERE IS A LOT OF FUNCTIONALITY IN THE PROGRAM. I HAVEN’T FOUND ANYTHING I DON’T LIKE ABOUT POWER PDF”

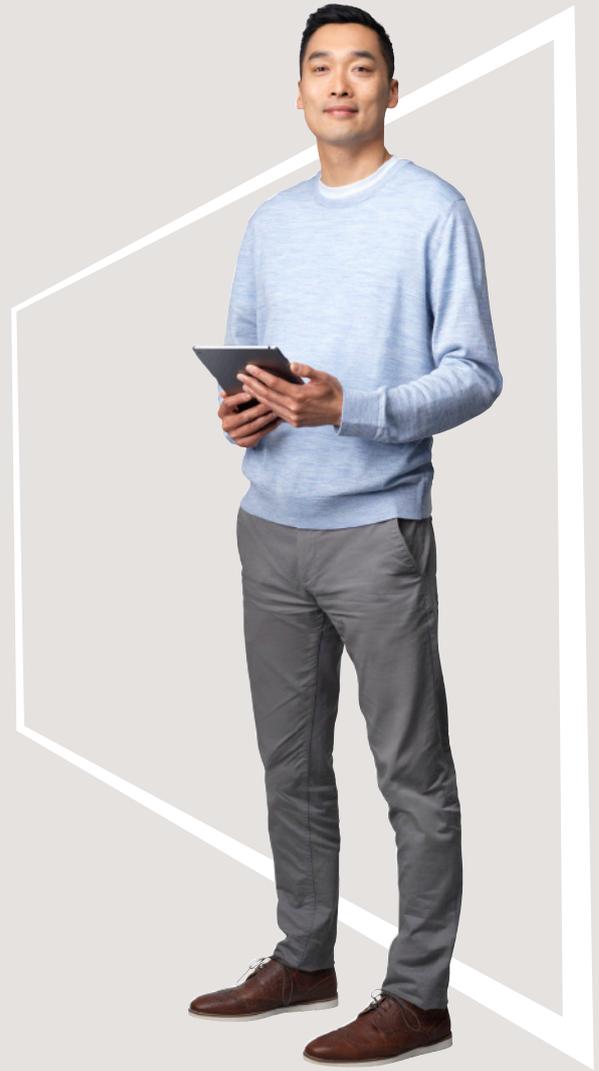
John Walters,
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LET'S TALK

Contact us to find out how our document management system will help your business increase efficiency, reduce cost, become more agile and ultimately focus on delivering an enhanced customer service

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