



Leading Business Adviser  
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Read how pdfDocs delivered on costs, digital workflows and integration with their MYOB Document Manager system...

## Accounting firm, Byfields, deploys pdfDocs to enable the move to digital workflows

Byfields is one of the largest CPA firms based in Western Australia, servicing a range of clients. Approximately 60% of Byfields clients across its seven offices are in the rural/farming industry. Byfields commercial clients are mainly concentrated in their Perth office, with clients across all types of business including retail, real estate, transport, financial services and manufacturing. The firm also has numerous clients in the medical and associated professions and has developed a specialisation in the pharmaceutical industry.

### The business challenge

Byfields are no strangers to the world of the Portable Document Format (PDF). They have a small Audit team that uses Adobe Acrobat for a variety of digital workflows. The firm wanted to extend these digital workflows across the firm to increase productivity and to strengthen internal controls. However, deploying Adobe Acrobat to all staff across their seven offices was cost prohibitive. Equally, many low cost and free PDF drivers lacked the functionality and integration the firm needed.

Mike Cornforth, IT Manager at Byfields, recalls their requirements. "Specifically, we were looking for a cost effective PDF solution that would provide staff the ability to create and edit PDF documents as well as scan documents to PDF. Moreover, the solution needed to integrate with our MYOB Document Manager system, which we use to store all our documents."

### Our solution

The team started to look for an Acrobat alternative and discovered Nitro and pdfDocs from DocsCorp. A pilot group of mixed users was set up to trial the two applications. Both applications worked well and provided similar features and functionality. However, pdfDocs stood out for a number of reasons according to Mike.

pdfDocs integrates with MYOB Document Manager out of the box—this was a critical requirement for Mike and his team. This made creating and saving PDF documents into MYOB a much more efficient and streamlined process, saving users a significant amount of time in mouse clicks. Also, the interface was very similar to MS Office. "We felt that this would significantly reduce training as it

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IT Manager,  
Byfields

was very familiar to all our users,” commented Mike.

More importantly, however, was the way in which pdfDocs handles document collation and bundling. Accountants and financial advisers work with multiple document types and formats, which need to be collated into a single document to be shared with clients. The pdfDocs Organiser Project feature made this a simple process.

The Organiser Project empowers users to combine, organise and edit documents quickly and easily in a unique client or project-centric workspace. Users can collate multiple documents from multiple sources, including local/network drives, email, or Document Management Systems, relating to a particular client or project into an Organiser Project workspace, which can be printed, emailed or saved directly into MYOB Document Manager as a single, secure PDF document.

Users can mark up the documents in the collated set with annotations and stamps, edit text and images, OCR documents and apply headers/footers, stationery and security settings to the documents. The user can also create an unlimited number of Organiser Projects.

### Other benefits

Mike plans to build on this early success. “We intend to extend our digital workflows using pdfDocs to enable staff to electronically redact or remove private and confidential information from the document; digital signatures to speed up the approval process; and electronic binders to publish all client documents to an easy-to-read electronic file.”

The electronic binder feature is unique to pdfDocs. It automates the process of converting and assembling vast amounts of documents into a single or multi-PDF document, which can be distributed to clients or third parties quickly and securely. Documents and folders, even folders with sub-folders from a MS Window file or Document Management System can be easily added to the Binder.

The documents and folders can be re-arranged within the Binder with drag-and-drop ease, adding headers/footers, a cover page, links, bookmarks, page numbering and security settings. The Binder can be output to CD, complete with a printable and interactive Table of Contents to help readers navigate the content.

### Summary

Western Australian accounting firm, Byfields, wanted to move away from paper-based workflows to digital ones to increase efficiency. After a pilot review, the firm went with pdfDocs, which provided a number of new digital workflows that included creating and editing PDFs, redaction, digital signatures and electronic binders. Moreover, the application integrated with the firm’s Document Management System —MYOB Document Manager—right out of the box!

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Mike Cornforth,  
IT Manager,  
Byfields

KEY BENEFITS
Combine electronic documents, scanned images, email messages and attachments into a single, secure file
Assemble, edit and publish documents related to a specific project, or client in a single workspace
Collaborate with colleagues allowing them to review documents and to add their own notes and comments
Protect the firm and the client by redacting private and confidential information
Save PDF documents directly into MYOB Document Manager
Increase workplace efficiency through integrated workflows

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