



Customer Story:

Financial Services Firm Easily Tracks Decades of Records

Behind the Scenes Financial Services juggles accounting services and tax preparation for many businesses. They needed a streamlined and reliable solution to maintain and instantly access decades of records for their clients.



Customer Story: Financial Services Firm Easily Tracks Decades of Records

HOW TO AVOID PAPER WOES?

If a hurricane struck, Debra Kilsheimer would evacuate with two things: her scanner and her violin.

"It's that important to me. I'd be lost without it."

The Florida bookkeeper is co-owner of Behind the Scenes Financial Services (BSFS), the accounting and income tax preparation firm she runs with her husband.

BSFS provides on-demand and virtual financial services. Finding documents quickly and staying organized requires efficient processes and remote access.

With over 30 years in business, Kilsheimer saw from the start that boxes of stored documents would impede business.

She was an early adopter of document digitization. She had an original ScanSnap model, which they used for over a decade.

The financial firm prioritizes a scanner for accounting that's easy to set up and use, and consistently works with no hiccups.

BENEFITS

Surprising Cost Savings

Kilsheimer relies on her ScanSnap iX1600 desktop scanner to securely digitize every important document that comes in.

So when the business's air conditioner went out, finding the 10-year-old receipt would save them a big expense. "I found it two weeks before the warranty ran out. I had a copy because I scanned it, which saved me \$10,000. That scanner is priceless to me because I have a copy of everything I've ever done," said Kilsheimer.

Safeguarding Paper-Heavy Audit Processes

Audits go more smoothly with a scanning solution that's easy to use.

BSFS scans every important paper for their business and for clients' tax records.

"I tell all my clients when they're brand new...It has to be easy enough for a client to figure out how to use, and I think the ScanSnap® is."

Debra Kilsheimer

Owner, Behind the Scenes Financial Services

Continued

Pension

Tax

Mortgage

Customer Story: Financial Services Firm Easily Tracks Decades of Records

While Kilsheimer's business partner and husband Harold Hickey prefers working with paper in day-to-day tasks, their ScanSnap has ultimately optimized client results.

"We just went through a sales tax audit with the client. We scanned everything that we thought was important. Auditor comes in...happy day, sales tax comes back zero," says Kilsheimer.

Digital files create a smoother and more secure audit process. No more sorting through papers and banker boxes. From speedy file retrieval to file longevity, digitizing documents ensures auditors can access the right information—fast.

Simple to Use, Reliable Performance

Instead of sorting through tedious boxes of client and business documents, BSFS can access proofs of purchase, receipts, warranties, and tax returns—fast.

"I don't like paper. I don't like filing cabinets," asserts Kilsheimer.

The small business owner appreciates that her new ScanSnap iX1600 is a compact desktop scanner that makes collaboration and storage easy. From quick, double-sided scanning with one touch, to fast remote access in the scanning folder, the scanner keeps her organized.

Kilsheimer wants her clients to have a ScanSnap model for the same reasons, and instructs them to invest in better business processes.

"If people tell me, 'I have an all-in-one device that can scan.' Yes, you do, but you have to get up from your desk and go over to it, and lift up the cover, put it in. You have to flip it over," she opines.

"You need to get a ScanSnap, I tell all my clients when they're brand new. It has to be easy enough for a client to figure out how to use, and I think the ScanSnap is," says Kilsheimer.

For Behind the Scenes Financial Services, using a Ricoh ScanSnap has ensured faster virtual collaboration with their clients, and decades of securely retrievable data.

**"(It) saved me \$10,000.
That scanner is priceless to
me because I have a copy of
everything I've done."**

Debra Kilsheimer

Owner, Behind the Scenes Financial Services

Recommended Product:
ScanSnap iX1600 module



Product Features:

- Fast, double-sided scans up to 40 pages per minute
- Touch screen controls
- Scan business cards and receipts with automatic de-skew, image crop and rotate
- Scan direct to cloud storage (Google Drive, etc.)
- Personalized profiles