FusionDox Case Study: eAuditRx

Connecting Documents, Data, and People

FusionDox not only manages your documents, it connects your data and people on an enterprise level. Even people that work in the field can access and be part of your processes and document flow.

- Rapid deployment because the solutions used built-in tools

- Clients still have access to the live QuickBooks files

- Entirely web-based meant customers did not have to re-configure their computers.

eAuditRx, LLC is a start-up company offering online CFO, Accounting and Bookkeeping services for to the SME (Small Medium Enterprise). Small businesses that either do not have the time or in-house resources for bookkeeping, accounting and tax work, can sign up for eAuditRx, and electronically submit their bills, bank statements, and other source documents through a secure online portal, where the documents are accessible via keyword search. Accounting professionals at eAuditRx then read the uploaded documents update the accounting files, prepare conciliations, initiate electronic bill-pay, prepare tax filings and provide key financial metrics to the business owner.

The Problem - Scarcity of Human Resources, and Secure Document and Data Transfer.

eAuditRx needed a secure web-platform on which to build out a world class online CFO, accounting, and bookkeeping company. Of the all the vendors who submitted proposals, Fusion Dox was the only company to provide a complete web-based solution. Other vendors including Microsoft Share Point, Alfesco Enterprise, and Cabinet NG were unable to provide a solution with the desired flexibility, scalability and integration that suited eAuditRx and its clientele. In addition, the other vendors required an investment of substantial internal infrastructure.

Financial Human Resources - The most significant problem has been around for a long time: Small organizations typically do not have enough time or manpower to keep up with the accounting work required for their business, and can often suffer adverse cash flow as a result.

Client Source Documents - Accounting is typically very paper intensive, and as a result, papers are often misplaced, which means important bills and other time sensitive obligations can be missed.

Client Accounting Data – eAuditRx needed to provide their clients the ability to upload important source documents from anywhere at any time. In addition, eAuditRx needed to provide the client with a convenient method of sharing QuickBooks data files across the a web-based platform, without incurring the expense of a third party application service provider.

The FusionDox Solution Implemented

FusionDox was the ideal solution to the problem. It is entirely web based -- so none of their customers needed to re-configure their computers or jump through any hoops to get in and do their work. In addition, eAuditRx wanted to build a custom web interface with Adobe Flash, and needed a system that would easily allow the display, edit and download of documents, which FusionDox provides out-of-the-box.

Eric Tenbroeck, MBA President, evaluated Microsoft SharePoint and Alfresco Enterprise as options for the project, but neither of these solutions came close to FusionDox in terms of ease of use and flexibility with integration.

When customers upload documents, they are stored directly in a FusionDox repository, where they are tagged, classified and indexed for search. The eAuditRx web application was able to communicate directly with the FusionDox API for viewing documents inside the web application, and can use FusionDox's document editing tools embedded in the application for QuickBooks integration, so QuickBooks files can be edited for the customers directly through the website. The web portal uses FusionDox for business process workflow as well for ease of management.

"It has been a home run. You are so very talented at what you do, and the fact that you are super responsive is just awesome."

Eric Tenbroeck, MBA President

Not only did FusionDox meet all of eAuditRx's requirements, but development went very quickly and the solutions were provided using built-in tools.

Summary

eAuditRx, and FusionDox, have successfully completed the Research, Development, Delivery and Implementation of a world class online accounting platform. Management at eAuditRx, LLC is amazed and delighted with the realization that there is a lot more under the hood of FusionDox than originally thought.

The overall experience is that FusionDox is extremely flexible, powerful and priced less than the competition. eAuditRx is now able to build out systems with FusionDox for their internal business needs, and are finding it is easy to put together organized collections of content and documents, even for a management team that is not comprised of developers. eAuditRx is also looking at some further add-ons to the portal since the application has been a success.