

"By choosing FileTrail's hosting solution, we avoided having to expand our IT infrastructure to accommodate an in-house hosting option."

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Public accounting firm gains control of client files with Hosted Solution.

Client Profile

Headquarters: Encino, CA

Industry: Accounting

The CPA firm of Grobstein, Horwath & Company LLP, has been providing its clientele with accounting, tax and a full range of specialized financial services, including litigation and management consulting, since its inception in 1966. It is among the largest accounting practices in Southern California and has access to resources worldwide.

FileTrail Implementation: 2005

FileTrail Products Implemented

- **FileTrail Hosted Professional** - On-demand service for file tracking and records management.
- **FTColorLabel** - On-demand printing of color-coded folder labels.
- **FTMobile™** - Portable platform for file tracking and auditing.
- **FTConnect™** - Scheduled synchronization of client/engagement and user/security data with upstream systems.

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Background

Handling client files used to be a manual process at Grobstein, Horwath & Company LLP (GHC), without an automated tracking system. Some of the four file rooms were sorted alphabetically and others were sorted by client number, complicating file handling. But, all that changed when the firm implemented FileTrail's Web-based file tracking and records management solution.

With FileTrail, GHC has saved time, reduced costs and allowed employees to focus on more productive work. FileTrail helped GHC create a new filing system based on client number, standardizing practices in all file rooms. A color-coded label was applied to all files to simplify filing and retrieval; a color-block clearly identifies the home file room for accurate re-filing. All staff can now search and locate files in FileTrail without leaving their desk. And bar code scanning makes location tracking easy so that files are found quickly.

Finding Files Saves Time

It's crucial to the everyday operations of GHC to be able to track and manage files effectively. The firm provides a full range of specialized financial services, including litigation and management consulting. Because of this, there are several types of very differentiated files stored in several file rooms.

All of the employees of the accounting firm have access to the FileTrail system at their desks. Employees can search for files, see where they are located and then go retrieve them. When the files are located in a file room, staff quickly do a self check-out using the bar code scanner in the file room.

"What I like most about using FileTrail is the ability to know the precise location of a file at any given time and to have a very good idea of what files exist for which clients," Teeple said.

Flexibility Improves Efficiency

GHC made a number of changes to FileTrail to make it fit the firm's unique needs. All of this was done with the configuration tools that are included in FileTrail. For example, the FileTrail organization chart was configured to reflect all the various practice areas.

Also, the label stock and the label designs were configured according to the different media and file rooms. Strip labels are used to color-code classification folders and accordion folders, and a custom label stock was created to fit the edges of the binders used in several practice areas.



Application Highlights

- The FileTrail application is hosted by FileTrail, Inc., with both data and application residing at FileTrail's data center.

Key Results

- **No Capital Expenditures:** GHC avoided the costs for servers and server software by using a hosted solution. The application and data are maintained in FileTrail's data center.
- **No Additional IT Staff:** All system maintenance and administration tasks are performed by FileTrail, eliminating any additional burden on existing IT staff.
- **No Additional Labor Costs:** GHC was able to keep its file rooms open, avoiding additional labor costs because of FileTrail's SelfCheck tools.
- **Custom Configuration:** GHC was able to configure its screens, search forms and labels to reflect the data fields that best describe each type of record.

Customer Insight

By choosing FileTrail's hosting solution, we felt more comfortable that we would be running the most up-to-date versions of FileTrail with little or no downtime, in addition to not having to expand our IT infrastructure to accommodate an in-house hosting option.

It has been a real pleasure doing business with FileTrail's staff. Their expertise, professionalism and sense of customer

service eased our firm's transition to a bar coding system and made us feel comfortable about committing to a significant change in our firm's culture.

About FileTrail

FileTrail, Inc., is the leading provider of browser-based records management solutions. Companies of all sizes turn to FileTrail to streamline processes with the latest technology and most configurable software. Headquartered in San Jose, California, FileTrail has been providing solutions for records management since 2001.

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Flexibility Improves Efficiency (continued)

GHC assigned colors to indicate the home file room of each file. Blue is used for the main file room; red for the tax room; yellow for box storage; green for the fiduciary practice; black for computer storage; orange for the libraries and purple for the business management file area. "We wanted to have visual cues to simplify the filing process," Teeple said.

Customizing the labels was an intensive, but vital task. GHC went through many different drafts of the labels.

"We had a lot of demands, and it didn't happen overnight," Teeple said. He added, "I was very pleased with the professionalism, attention to detail and patience they showed us."

A Happy Conclusion

Thanks to FileTrail's innovative process, implementing the system was fairly straightforward. It was also very convenient, since GHC was able to house its database on FileTrail's servers.

"It has been a real pleasure doing business with FileTrail's staff," said Howard B. Grobstein, a partner at the firm.

Solution Summary

FileTrail Professional - Provides an integrated platform for all staff to search, locate and request files. Powerful file room tools simplify filing and retrieval tasks. Security tools control who can view, add or update records.

Color Coding - Automated color-coding prints color codes, a bar code and text on a single label. This simplifies the creation of new files and saves up to 60% of labor in the process.

FTMobile™ - Provides a user-friendly portable platform for remote activities. The integrated bar code scanner and FTMobile software allows files to be checked-in, checked-out, transferred and boxed without being tethered to a workstation.

FTConnect™ - Loads and updates data from upstream resources to keep FileTrail data synchronized and up-to-date with authoritative systems. FTConnect can also trigger creation of files for new clients.

Contact FileTrail Today!

For more information about the benefits of automating your firm, contact FileTrail or your local FileTrail representative at:



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