Enhanced Accounting Services App Benefits Bookkeepers And Clients

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Vancouver, B.C. (rushPRnews) 01/30/14 — Integration with DropBox adds an important new element to the document sharing workflow process

It's an ongoing challenge for many small businesses owners: finding time to sit down with their off-site bookkeeper to go through queries on financial documents. Now a Canadian company has come up with an innovative solution.

LedgerDocs is an online document management application and collaboration tool that allows businesses to scan and upload financial documents that can be accessed off-site by their bookkeepers who can then respond with questions and comments using the same platform.

The service is now integrated with DropBox, a leading provider of cloud storage and document sharing for personal and business users. Its wide range of functions simplifies the process of uploading and storing documents. Integrating LedgerDocs and DropBox provides a streamlined process for users to upload, manage, and share documents.

Typically, off-site bookkeepers spend a lot of their time trying to communicate with clients by phone, fax or e-mail, or they have to travel to

clients' offices where they sift through piles of paper sorting out receipts, invoices and other financial records they require to keep the company's books balanced and up to date.

If a client is not available at the time to answer questions about the documents, the bookkeeper usually leaves notes and schedules a return visit or a follow-up call to get the answers. LedgerDocs puts the whole process online. In effect, it becomes a virtual shoebox coupled to functions that allow storage and sharing of documents and information and collaboration between bookkeepers and clients.

For example, clients scan and upload the documents to the LedgerDocs platform, and their bookkeepers then sort, search and file them quickly and efficiently and use the platform to send notes back clients requesting more information if necessary. The service is available 24/7 which adds to its convenience.

Faxing, phone calls, e-mails and face-to-face meetings to gather and clarify information can become the exception rather than the rule for bookkeepers using the new technology, says LedgerDocs founder Wayne Zielke.

"LedgerDocs is a pure document management system and not tied to any specific accounting software platform, so it can be used anywhere in the English-speaking world – and translations of the app into other languages is on the cards," says Mr. Zielke.

And at a cost of only about $10 a month per client the return on investment when measured against the time saved is well worth it, he says.

"We wanted to develop an application that would lower the cost of business for bookkeepers by reducing travel time to clients' offices while also enhancing the level of service they were providing," says Mr. Zielke. "LedgerDocs does that, and the time it saves bookkeepers allows them to expand their business by taking on more clients."

For clients, the benefit of LedgerDocs is their ability to deal with questions

and requests for more information when it suits them, which is often after business hours, and then respond via LedgerDocs.

Mr. Zielke says LedgerDocs is one of the most advanced applications currently available in its field and is in line with global trends toward the use of digital technology in accounting services.

For example, he says a recent white paper published by the American Institute of Chartered Public Accountants based on research by Dr. Geoffrey Moore, one of the world's leading business strategists, pointed to three fundamental trends that are changing the future of client accounting services as a result of the impact that computing and networking is having on human culture globally.

The three trends are:

- The migration of text documents from paper to digital formats.
- A migration from business affairs being conducted in person and at a specific location to being conducted online from whatever location is most convenient.
- A transition in business organization from large integrated corporations that staff up internally to meet all their requirements to a hybrid global model in which core functions are still done internally but context functions are outsourced to specialist providers.

"LedgerDocs is perfectly aligned with these trends," says Mr. Zielke. "We are meeting the needs of bookkeepers and their clients as they move into a digital age that will transform the way we do business."

For more information about LedgerDocs or to sign up for a free trial visit www.ledgerdocs.com

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