



CDM Builds Business With DocBuild Plus™



CLIENT

CASO Document Management (CDM)

PROBLEM

No direct link between Adobe Acrobat and EasyFile; pdfs had to be uploaded separately.

SOLUTION

DocBuild Plus™

BENEFIT

Increased efficiency, cost savings

EXECUTIVE SUMMARY

CDM has been a respected leader in the document management industry for nearly 30 years. With expertise in document scanning, workflow automation and enterprise content management (ECM) solutions, CDM helps clients increase efficiency, lower cost and gain greater control of their business processes.

As one would expect, CDM's own business processes are as efficient as can be. The organization leverages EasyFile™ Content Management System, a secure cloud-based solution they acquired in 2021.

Upon installation of the system companywide, CDM staff found one integration, DocBuild Plus™, to be a complete game-changer. That's because DocBuild Plus converts and upload pdf documents into EasyFile in one simple step, eliminating the need for Adobe Acrobat.

The addition of DocBuild Plus generated a remarkable increase in efficiency and cost savings worthy of closer review.

PDF conversion and
import 5x faster



80 invoices per
month



Expenses reduced



THE SITUATION

Upon acquiring EasyFile® Content Management System, CDM integrated it companywide for its own document management needs.

Like most content management systems, EasyFile® relies on Adobe Acrobat® for pdf conversion prior to uploading documents into the system. That means the staff would still need to go into EasyFile and upoad their new PDFs into the system separately.

CDM's business office receives more than 80 invoices monthly from a variety of sources, including print mail, email, faxes, word docs, and others. So the team would be unnecessarily burdened without the DocBuild Plus companion module.

"We wanted this solution to be easy to use so that everyone would get behind it," explains Candice, Business Operations Manager for CDM. "It also needed to prove itself as a better converter for our needs than Acrobat," she adds.

THE SOLUTION

CDM installed DocBuildPlus™ and trained the team to convert and upload pdfs in one simple step, as well as leverage other features in the software such as integration with DocuSign and EchoSign.

DocBuild Plus extends all of CDM's document related tasks into one easy to use application with numerous integrations. And though it was created for EasyFile, it can be integrated with virually any content management system to acheive a 'paperless' office.

CDM's documents are saved to SkyDrive®, yet docs can be saved to virtually any Cloud storage account such as Dropbox®, Google Docs®, Box®, countless others.

"The upgrade was fast and painless," confirms Candice. CDM tech support was able to install the product in every machine without any issues. Each install took about 6 minutes per machine.

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We setup 12 workflows
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- Candice Vance, Business
Operations Manager



“A quick 10-minute session was all it took to get the team up and running. Now we’re adding invoices to the system in seconds rather than hours.”

- Candice Vance, Business Operations Manager for CDM

“Training was just as easy” says Candice. “A quick 10-minute session was all it took to get everyone on the team up and running.”

CDM saw a 5x increase in invoice productivity, giving the company back significant time to focus on other important matters. “What could take weeks manually is now possible on demand,” Candice explains. “We setup 12 workflows in 3 days and haven’t look back.”

“Now, the entire company uses the software for pdf conversion, upload, signature integration and more with the ease and confidence we had hoped for,” she concludes.

ABOUT CASO DOCUMENT MANAGEMENT (CDM)

CDM has been an innovator in developing practical, cost-effective imaging services and document management systems since 1994. With a management team totaling more than 100 years of experience, they have a proven track record with even the largest commercial and government requirements. CDM offers a full-range of imaging services or a comprehensive custom solution tailored to each company, industry or specific project. They support hundreds of regional and national clients in retail, finance, government, healthcare, education, construction, manufacturing and other sectors. To learn more about CASO Document Management (CDM), call 888.719-0065 or go to www.caso.com.