



From Bottlenecks to Automation: How CASO Streamlined Business Operations with EasyFile



DOCUMENT MANAGEMENT

CLIENT

CASO Document Management

PROBLEM

Business communication and task management were manual, fragmented, and error-prone.

SOLUTION

EasyFile Workflow Automation & E-Forms

BENEFIT

Faster Processes, Increased Efficiency, Cash Flow Improvement, Enhanced Client Service

CLIENT OVERVIEW

Founded in 1994, CASO Document Management has nearly 30 years of expertise providing end-to-end document scanning and management solutions. CASO processes 40 million pages annually and offers a full suite of document services, including scanning, shredding, and workflow automation. With a commitment to efficiency and security, CASO serves clients across a variety of industries and geographies, including nationwide document scanning services from key locations in Texas, New York, and Pennsylvania.

PROJECT OBJECTIVE

The objective of the project was to eliminate inefficiencies in CASO's Business Office by deploying EasyFile's workflow automation solution to streamline communication, reduce manual follow-ups, and prevent delays in critical tasks. The immediate goal was to implement a Client Invoice Workflow within 24 hours to ensure timely billing and avoid financial losses. Additionally, the project aimed to automate key processes such as purchase order approvals and invoice creation, minimizing errors and compliance risks. By empowering non-technical staff to manage workflows independently, CASO sought to enhance collaboration, accelerate decision-making, and achieve significant operational savings.

THE PROBLEM

CASO's Business Office faced significant challenges coordinating tasks

Reduced time spent
on manual processes
by 40%



Increased productivity
by reducing manual
data entry errors
by 35%



Reduced operational
costs by streamlining
organizational process



“The EasyFile workflow has saved me hours each week managing Purchase Orders, Project Implementation, Invoicing, and locating client documents. I can’t imagine how we functioned before EasyFile.”

- Rick Brillante, VP of Account
Management at CASO
Document Management

across multiple departments. Communication relied heavily on email, Teams, and phone calls, resulting in inefficiencies, delays, and miscommunication. The Business Office not only managed its own workload but also frequently followed up with other departments. Typical responses like, “I lost that email, can you resend it?” caused critical delays, leading to serious business consequences:

- Invoices delayed, risking six-figure payments not being sent.
- Missed due dates that incurred penalties.
- Project start dates pushed back, affecting operations.

Faced with increasing inefficiencies, the CEO gave the Business Office a tight deadline: set up a Client Invoice Workflow in EasyFile by the next day.

THE SOLUTION

Incredibly, the workflow went live by Tuesday evening, earning positive feedback from end users. Over the following month, the Business Office Manager, Candice Vance, built six additional workflows—without any programming experience—using EasyFile’s intuitive, point-and-click tools.

These workflows transformed essential processes, including purchase order approvals, client billing, and invoice creation, removing delays, errors, and compliance risks.


How EasyFile Helped

EasyFile’s intelligent workflow automation and e-forms solution directly addressed CASO’s challenges by:

- Automating repetitive tasks.
- Streamlining document management.
- Enhancing cross-departmental collaboration.

KEY BENEFITS OF EASYFILE

- **Customizable Automated Workflows:**
Tailor workflows to match unique business processes, ensuring greater efficiency and fewer delays.
- **Accelerated Decision-Making:**
Automate document routing and approvals, eliminating bottlenecks and enabling faster decision-making.
- **Enhanced Collaboration:**
Keep teams aligned with real-time updates and notifications throughout the process.



“I would never have met the one-day challenge to automate our Client Invoice process without EasyWorkflow. I built the entire process without needing the Technology Team. And, I have to say, it was love at first sight. Now, I’m creating workflows for all our processes.”

- Candice Vance, Business Manager at CASO Document Management

- **Improved Compliance:**
Maintain regulatory compliance with automated audit trails, document retention policies, and secure storage.
- **Financial Savings:**
CASO reduced staffing in the Business Office by one-third, issued invoices weeks earlier, avoided late fees, and accelerated client project starts.

RESULTS

Implementing EasyFile’s workflow automation solution led to significant improvements across CASO’s operations. The automation of key processes reduced time spent on manual tasks by 40%, allowing staff to focus on higher-value work. CASO experienced a 35% decrease in manual data entry errors through automated data capture and approval workflows. Compliance efforts also improved, with automated tracking and audit trails ensuring seamless regulatory adherence and stress-free audits. These efficiencies translated into faster invoice processing, earlier project starts, and the elimination of late fees, driving both operational and financial gains for the organization.

SUCCESS STORIES FROM OTHER INDUSTRIES

- **Manufacturing:**
A manufacturing firm reduced approval times **by 40%**, improving project delivery timelines.
- **Financial Services:**
A financial services company achieved **100% compliance** with industry regulations using EasyFile’s automated retention and audit trail features.

WHY PARTNER WITH CASO DOCUMENT MANAGEMENT

CASO Document Management offers a comprehensive suite of services designed to meet the needs of modern businesses. Whether it’s digitizing legacy records, automating workflows, or ensuring regulatory compliance, CASO empowers organizations to operate more efficiently, securely, and effectively.

Ready to elevate your document management strategy? Call us at (888) 388-2276 or visit www.caso.com today to learn more about how we can help your business thrive in a digital world.