

James T. Scherer, CPA

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A Kansas-based CPA firm uses high-speed scanning to help clients maintain financial viability in the present and a proactive approach to the future.

For over 30 years, James T. Scherer, CPA has provided quality, personalized financial guidance to local individuals and businesses in Kansas and Missouri. Scherer's expertise as a certified public accountant ranges from basic tax management and accounting services to more in-depth services such as compiled financial statements, and financial planning.

Since it was founded, the firm's mission has been to help clients maintain financial viability in the present while taking a proactive approach to achieve future goals. This requires open communication to reach an understanding of each client's needs; thorough research; and sound analysis. It also requires accounting workflows that emphasize efficiency, security of client data and immediate access to critical tax and accounting information.

Jim Scherer has 37 years of accounting experience and has held his CPA license for 34 years. In addition to his extensive experience in accounting, Jim served as the mayor of Hiawatha, KS, for 10 years and has held many committee positions within the community.

His present firm was formed in 1978, and today has a staff of four full-time and two part-time professionals. Client services include accounting software selection and implementation; bookkeeping/write-up services; business consulting; business entity selection; buying and selling a business; estate and trust tax preparation; financial analysis; financial statements; IRS representation; management advisory services; payroll; retirement planning; sales tax services; and tax preparation/planning. The firm also offers notary public services.

Scanning activities are necessary for tax and accounting services, and are performed by one of the part-time support professionals. It was this necessity that led Scherer to seek a powerful and economical scanning solution.

After researching the options on the Internet, Scherer purchased an Ambir ImageScan Pro 925.

“We were using a Fujitsu workgroup scanner, but we were concerned because its drivers were proprietary and not TWAIN-compliant,” says Scherer. “TWAIN compatibility is necessary for us to use the eFileCabinet document management solution. It is also needed for the full version of Adobe’s PDF creator, which we use. So I did my research on the Internet, and found the Ambir Technology lines of scanner and document management solutions.”

“Frankly, the Ambir scanners looked just as good if not better than Fujitsu, but with a more reasonable price,” Scherer notes. “We purchased the ImageScan Pro 925i workgroup scanners in December 2013, and have been using it to convert all of our client records from the past to an electronic format. We have scanners on almost every desktop as well for less demanding input.

Key points about the workgroup scanner from Ambir is its Automatic Document Feed feature, which allows up to 100 sheets document pages to be scanned at a time, with a scanning speed of up to 25 pages per minute. Despite its compact footprint, the 925i captures images of everything from legal & letter size documents to insurance, identification and business cards. And it carries a three-year warranty.

The firm uses its scanner to input data for UltraTax (CS) and CS accounting, as well as for more general tax, general ledger, wills, estate documents, trust documents, and payroll.

“The things we like best about the scanner, outside of TWAIN compliance, are the cost savings and the support from Ambir,” says Scherer. “Their tech support was helpful in troubleshooting a setup problem that kept the scanner from picking up multiple pages at first. And since we are eliminating the need for paper and toner, we don’t have to tie up our capital on those supplies. We saved thousands of dollars in the first year alone by not having to print and file copies of tax returns.”

“With electronic documents scanned into our system, I can bring up client files immediately, without ever leaving my desk,” he says. “That is impressive to clients, since we can provide fast and accurate answers to their questions.”

