Small Accounting Firm Saves Nearly a Full Day of Work Each Week with Server Software

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>
> Jennifer Means, Accountant, Bunten & Associates

Bunten & Associates provides small businesses and individuals with payroll, accounting, and tax services. The firm wanted to improve its management of customer information, so it began to use Windows Home Server. With automated backups and streamlined access to information, the firm's three employees save nearly a full day of work each week. Using the solution, the firm also has optimized its protection of valuable customer data.

Business Needs

Bunten & Associates is a small accounting and tax firm located in Covington, Kentucky. With just three employees, the firm provides approximately 60 small businesses with accounting and payroll services, and helps up to 500 individuals annually with tax preparation. Bunten has experienced steady growth since it opened in 1993, but the current economic environment has resulted in even larger growth. Jennifer Means, Accountant at Bunten & Associates explains, "Many people who have lost their jobs have come to us for help in establishing their own businesses."

To keep pace with its growth, the firm wanted to streamline administrative work and make it easier for its staff to access information. Each week, Means, who also serves as the firm's technology lead, manually backed up customer information to blank CDs. She spent at least two hours a week babysitting the process. Accessing information from previous years also was none too easy. "First we had to locate the right CD, then we had to load it onto a computer. The time involved—and the cost of the CDs—was huge," she says. Bunten spent approximately U.S.$350 a year on blank CDs.

Bunten also lacked a centralized repository for customer data. Because the staff shared reception duties, if the front-desk person needed information from one of the three other computers that were located in a separate area, he or she needed to close the front office to go to manually copy the information. "Also, to work from home, we had to copy files onto a CD," says Means. The process was inconvenient, and risky, because customer data was transferred outside of the firm's firewall. "We knew there had to be a better way."

Solution

In October 2009, Bunten & Associates learned about the Windows Home Server operating system from Kevin Royalty of Total Care Computer Consulting, a Microsoft Small Business Specialist that helps small businesses get the most out of their technology systems. "We were immediately sold on the ease of use of Windows Home Server," says Means.

Total Care installed Windows Home Server on an HP MediaSmart EX490 server and connected it to the firm's four PCs, which ran the Windows XP Professional operating system. With Windows Home Server, the firm can schedule automated, nightly backups. Total Care also employed a software add-in for Windows Home Server that the firm can use to create a "backup of a backup" for an additional layer of security. Backup data is stored on two external hard drives, one of which is located offsite.

Proactive alerts notify the firm of potential connectivity issues or computer failures. "Recently, I saw a red shield indicating a problem," says Means. She

called Total Care, who helped her determine that a hard drive on one of the computers was failing, resulting in an interruption to the automated backup process. "We swapped the computer out for a new one before we lost any data." The new computer runs the Windows 7 operating system.

With Windows Home Server, the firm now has a centralized hub for storing and organizing its customer information. "We're in the process of moving customer data from Bunten's PCs to the server running Windows Home Server," explains Royalty. But even now, using the remote access feature, staff can gain quick-and-easy access to information both inside and outside the office by simply accessing a secure Web site to connect to the server and to individual computers.

Benefits

Bunten & Associates uses Windows Home Server to simplify time-consuming tasks and to make it easier to manage information as its business grows. Its small staff now works more efficiently and provides a higher level of customer service.

Higher Efficiency

Using the automated backup capability of Windows Home Server, Means's work days have improved significantly. "It takes me 15 minutes a week now, instead of 2 hours, to back up our data. The process runs in the background while I continue to work." Easier access to information also helps everyone in the firm save time. "We no longer have to walk to different computers to find what we need," explains Means. She

estimates that the staff saves at least 6 hours a week with Windows Home Server.

Peace of Mind

With proactive alerts and automated backups, the firm can keep customer data better protected and readily available. "With Windows Home Server, we know that our customers' records are housed safely," says Means. This is crucial in the event that Bunten experiences a hardware failure or other data-compromising situation, but it also benefits the firm's customers. "If a customer loses their own data, we can help them recover it because we have backups. This adds value to our business." Tax audits can require customers to furnish up to four years of their most recent records, so, "this is hugely important," she says.

Improved Work Experience

Remote access to information has changed the way staff at Bunten works. "It's easy to work at home now, without the risk of losing data," says Means. With Windows Home Server, staff can access information from their home computers without moving it outside of the firm's firewall. "All I do is click a link, enter my user name and password, and it's as though I was sitting at my computer in the office. Windows Home Server saves time and costs, but it also saves our sanity." The firm saves nearly $350 a year by not having to purchase blank CDs for the backup process. "Between the guidance we've received from Total Care, who has always tried to help us become more efficient and more self-sufficient, and Windows Home Server, we can accommodate our growth comfortably."

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