Company: High Point Furniture

ERP: Infor

Situation

High Point Furniture Industries (HPFI), founded in 1958, manufactures wood case goods and upholstered seating for a wide range of commercial markets. With manufacturing plants in High Point, North Carolina, they're a leader in quality and environmental practices, including efficient recycling and raw materials usage.

Despite their production efficiencies, HPFI experienced severe paper overload internally. Misfiled documents, lost invoices, and delays in answering customer requests were overwhelming. Elaine Handley, Accounting Manager states, "We were looking to improve processes to save time and money . . . how we dealt with customers, and how we did our daily jobs. Our ultimate goal was to find a way to improve the bottom line, to improve profitability."

IntelliChief Solution

HPFI, an Infor XA ERP user since 1999, asked Infor for a document imaging solution. Infor recommended IntelliChief for its feature-rich capabilities, and easy integration with HPFI's ERP system.

The next step was to obtain project approval. The CEO and CFO wanted real ROI – reduced costs encompassing labor, faxing, postage, check stock and paper. "It was difficult," explains Handley, "because neither the CEO or CFO wanted to see any soft dollars. We could have eliminated people, but that's not how we wanted to justify the project. We were able to show there were big savings, which could be used to improve profitability and services, and those were hard dollars."

The first challenge was HPFI's Purchase-to-Pay process: purchasing, receiving, and accounts payable. When creating PO's, buyers printed them, emailed or faxed them to the vendor, stapled the confirmation receipt to the PO, and put everything in a basket to wait for confirmation, which took up to 4 hours.

Streamlining Purchase-to-Pay

All these cumbersome steps were eliminated with IntelliChief. When a PO is created, an electronic copy is saved. FastFax (the integrated fax server for IntelliChief) then faxes or emails the PO in mere seconds without user intervention. Order Acknowledgments (received via fax or email) are archived in the imaging database, and linked to the appropriate PO. Either document can be retrieved on the screen at any time by the user.

Incoming products had Receiving Documents matched against PO's, entered in ERP, and filed. When invoices arrived in Accounts Payable (AP), invoices were matched against the receiving record in the system. If there was a discrepancy, AP staff needed to look for the original receiving documents, to determine if they had been incorrectly entered into the ERP, or if the invoice was wrong. "If the purchase had been made by our other facility, I had to call them to send me a copy of the receiving documents so I could match, review everything associated, and find out what happened," says Crystal Delgado, Accounts Payable Associate.

Today, after documents are matched in the warehouse and a receiving record created in the ERP, the receiving documents are scanned into IntelliChief, eliminating the need for hard copies and ensuring they are available online without the need to send physical paper to Accounts Payable.

Accounts Payable Results

Faxed invoices are captured via FastFax and archived. Mailed invoices are scanned. Emailed invoices are saved with the easy-to-use IntelliChief Print Capture application.

IntelliChief's Workflow matches invoices against receiving documents and sends them to an electronic inbox ("Matched Invoices"); invoices without a receiving document go to an "Unmatched Invoices" inbox. What is the impact? Delgado comments, "Every day I had to pull up the folder and try to match invoices . . . that was a big pain. . . With IntelliChief, the invoices are awaiting electronic matching with the receiver, as if they were saying, 'Hey, here we are!' It's a tremendous time saver."

Prior to IntelliChief, the huge paper trail prevented invoices that needed approval to be paid quickly. Copies were made by AP staff, sent to the appropriate manager for approval, and came back to AP for a voucher. Delgado explains, "When invoices make it back to us, and I had to contact each person to verify they received it, approved it, and sent it back. Sometimes invoices were paid late, or we couldn't take advantage of vendor discounts because we couldn't make the deadline." IntelliChief's Workflow now electronically forwards invoices for approval to the correct person. They approve it with a click of the mouse. **With IntelliChief's automating workflow, HPFI has put an end to missing invoices, delays and unachieved discount savings.**

When AP wanted to pay invoices, Delgado again had to match paper documents. "I used to spend at least half a day every week manually matching up invoices and checks to be approved, and signed by the CFO and CEO. This meant looking through filing cabinets for correct invoices, and putting them in a folder with the corresponding check."

IntelliChief saves checks as an electronic image, and manages them via Workflow. Delgado describes how IntelliChief streamlines check runs and approval processes: "IntelliChief automates our check production; checks go via Workflow to the CEO or CFO, and they can simply click and look up the relevant documentation on-screen and either approve or void the check."

Order Processing Pains

The second challenge was orders - coming via fax, email and postal mail. They were manually routed to the Traffic Group for review and carrier information access, and logged before going to Order Entry. They were sent back to the Customer Service Representative (CSR) or manager with any questions, or when a discount required approval. CSR Amanda Lewis explains, "There was no way to know where in the process the order was in any given time, until it was put into the system. Sometimes we had to ask the customer to re-send, which you can imagine they weren't very happy about. Then the workflow-by-hand's a tedious process, having to constantly ask staff in various departments where the order presently is, and where it's going next. It slowed our fulfillment."

After the order was entered, an acknowledgment was printed, proofed, and compared to the PO. Once approved, a CSR made a copy, faxed or mailed it to the customer, and filed the copy with the PO.

Order Processing Done Right

With IntelliChief, order processing is efficient. Faxed orders are captured with FastFax, mailed orders are scanned into the system, and emailed orders are saved with IntelliChief's easy-to-use Print Capture feature, and archived in IntelliChief's database.

The electronic order is sent to Order Entry or the CSR via IntelliChief Workflow. The order is routed to Traffic, and then to Order Entry. IntelliChief creates and saves the Acknowledgment, which is faxed or emailed directly to the customer.

"We now have only 3 people involved in the process rather than 7 previously, and we always know exactly where the order is," says Lewis. ***"IntelliChief cut our order process time in half."***

When customers called with questions about invoices, CSR's had to request a copy from Accounting. Elaine Handley explains, "The invoice had to be pulled from the files, which could take minutes or hours,

and then logged." The order history (original PO, any change orders, acknowledgments, and all related documents) is now electronic. "We can pull up and see where any bottlenecks are. We can see if orders are not being entered." Invoices are emailed to customers, saving postage, labor, and mailing costs, exudes Handley.

Key Benefits

IntelliChief provides HPFI both ROI and intangible benefits. "It helped decrease the stress level! Being able to really see what's happening, to see where holdups are is incredible," states Handley. "From a management standpoint, that's a measurable benefit to me. An additional benefit is having everything electronic accessible for our auditors. We can't wait until next year when they come in; we'll provide them with a computer workstation accessing IntelliChief; they can do document searches without involving any of our Accounting staff."

Paperless Future for HPFI

Implementing document imaging is not an easy process. "We had some people who were scared to make the change," says Handley "The idea of not having paper anymore for some people was difficult to overcome, initially. They now understand document imaging is a real advantage for us internally, with how we serve our customers and that's our competitive advantage." HPFI plans to roll out IntelliChief to other high-documentation, workflow-intensive areas of the company, reducing costs throughout the organization, while serving customers faster and efficiently.

Contact Us Today

To learn more about how HPFI and other organizations are utilizing IntelliChief and realizing impactful benefits, contact us today:

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