The Distributor's Challenge

N. B. Handy, a leading wholesale distributor of commercial roofing products, HVAC equipment and supplies, sheet metal and sheet metal fabricating equipment, utilizes their ERP application to help in their efforts to "adhere to beneficial business practices," according to Angela Isaacs, VP of Information Systems. Like many distributors, recent years were challenging and forced the company to rethink its costs. What they found was that much could be saved by getting rid of all the paper lying around, and so the search for a document imaging solution began.

The Paper Problem

Accounts Payable operations handle a lot of paper throughout their multi-department touch points of a businesses' processes workflow. Noticing the potential bottom-line impact that AP can deliver via reduced invoice processing costs, N.B. Handy decide to tackle this process area first.

"What everyone in the company wanted was access to AP invoices," says Isaacs. Invoices would come in, get keyed into our ERP, and then filed in filing cabinets by batch. This was all done manually, and when someone requested an invoice, AP had to go find the batch number that was associated with that particular invoice and pull the invoice... it was a very time consuming process."

That process was particularly painful during audits, as Accounts Payable employee Sherry Franklin recalls, "the auditors would give me a list of invoice numbers; we then had to go in and physically look up the batches, pull all the invoices from the filing cabinets, and make copies for them." These functions could take up to 8 hours, or a person's full day. With a staff of 6, it was time they could not afford to lose.

IntelliChief Paperless Process Management

It was at a conference that Isaacs learned about IntelliChief. Their ERP integrated approach to document management is what differentiates IntelliChief from other document imaging solutions. This creates seamless integration points that enable users to capture, create, store, index, search, retrieve and distribute documents directly from the ERP system without having to get up from their desks or look through filing cabinets.

N.B Handy utilizes two front-end programs provided by IntelliChief - FastFax, the enterprise faxing and email solution, and Formtastic, the electronic forms and laser checks solution created for IBM ERP platform users. Combined with IntelliChief, they form the backbone of the company's paperless process management initiative, by capturing documents from the moment of their creation or reception, managing them through workflow, facilitating their distribution via fax or email to customers and suppliers, and ultimately their archival.

Big Savings in Short Time

Now that N.B. Handy has IntelliChief, all incoming invoices, whether received via fax, email, or mail are available electronically from the system.

"Before, when invoices came in and were entered into our ERP, the physical paper itself would be filed in a cabinet, and other departments of the company would not have access to that invoice unless requesting AP to go back to their files, make a copy and either email or fax it to somebody," explains Isaacs. "Now that invoices are captured electronically in IntelliChief, users can simply access them through our ERP screens.

According to industry research, it could cost up to $32 more to process a single invoice manually versus using an electronic document management system, and over 23 days more to process that same invoice if relying only on paper. Multiply that by the 400 to 500 invoices that N.B. Handy processes per day, and the hundreds of thousands of dollars in savings they realize annually is apparent, just by eliminating the paper.

World Headquarters
13095 N. Telecom Parkway, Tampa, FL 33637
813-971-9500
sales@intellichief.com
www.intellichief.com

Another benefit of having IntelliChief is the ease of capturing emailed documents. When invoices were emailed to the AP department, the usual process involved printing them before they were processed. "Now, we can move them over to IntelliChief without having to print them," mentions Franklin, referring to IntelliChief's Print Capture function that enables users to electronically archive any electronic document with the "File - Print to IntelliChief" option from their application.

When processing expense invoices that require approval, the old method relied on manually faxing or mailing the original invoice to the appropriate manager for approval, a process that could take days. Isaacs explains it, saying "we have all expenses go through an approval process. If it's an expense, then our AP Rep sends invoices via IntelliChief's workflow process so they will be routed to the department originating the expense. For example, I approve all IT expenses, so my invoices are electronically routed directly to me. With IntelliChief, I view it on the screen, make a note where it's coded to the general ledger, then release it back to AP for payment, all by clicking the image on the screen." The result: less time needed for invoice approvals. IntelliChief makes it easy to track where invoices are and why they are being delayed, and ability to escalate and use alerts when an action is required. A process that used to take days now can be done in minutes.

The once painful audits are now easier than ever. "We have a workstation set for auditors. They type in the invoice numbers into IntelliChief, and all related documentation is there for them to review. It's less work for us and and much faster for them," explains Isaacs. And Franklin adds that "the auditors are doing all the work without us having to do it for them!" All the hours previously spent retrieving files for audit are now used more productively.

Future Plans for Paperless Processing

How happy are the users? "Our entire company loves IntelliChief," comments Isaacs. "No longer do people waste significant amounts of time searching for invoices." IntelliChief has been so well received at N.B. Handy that they want to expand its use to other parts of the organization. "We'd like to roll out IntelliChief for Accounts Receivable and our Credit departments. Human Resources would be next, and we also want to include Shipping, so that we can get proof of delivery captured electronically and right into IntelliChief."

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