



smartFiling

Royal Foods Case Study



The Business

Royal Foods is a Brisbane based, privately owned gourmet food company. They specialise in catering to the Australian food industry by sourcing and marketing quality food products from around the world. Founded in 1989, Royal Foods have spent the past 20+ years helping their customers by providing efficient service and developing innovative, quality products.

The Challenge

Staff at Royal Foods were struggling to control the continual influx of paper in the form of invoices and Proof of Delivery (POD) receipts. In order to cope with the filing of these items staff in the company's Debtor Department were having to take paperwork home on a nightly basis to sort and file. Obviously an untenable situation.

To make matters worse, the same challenges also arose when it came to finding the paperwork at a later date. The retrieval of a POD when dealing with a customer was a lengthy task that meant the customer was often required to wait for an extensive period of time for a resolution.

It was decided that a solution to this paper bottleneck was required to free up staff time and streamline the process when dealing with customers. The solution needed to overcome these issues would also be needed to integrate with the existing systems and processes already established.

Royal Foods decided to implement a reliable document management system in order to streamline their document storage processes. Initially the system was to be solely implemented within the Debtors Department with a view to implement throughout the entire organisation.

document management system



The goals associated with the project were to:

- Streamline the onerous task of manually filing paper based invoices and PODs;
- Eliminate the possibility of invoices being misplaced; and
- Enhance the process of searching for and retrieving documents.

The Solution

After researching the available options Royal Foods decided to use Redmap's smartFiling solution. This system was to handle the storage and management of the invoices and PODs generated within the business. As well as this the new solution was required to integrate with the existing Pronto ERP system.

Upon completion of the project the Debtors Department was able to begin scanning their existing paper records. Using OCR technology and predefined templates these records were automatically filed within smartFiling. This allowed the department to store all of their documents in a single repository.

The key deliverable for Royal Foods in implementing a document management system was the ability to locate information quickly and easily. Having all of these records appropriately filed in one location ensures that staff are able to locate documents instantly when dealing with customers.

Employees can now search for records either in the manner in which they were filed or based on any word in the document. Being able to search for a document based on its content means that locating a specific record has become a much simpler task. In addition to this records can also be accessed from anywhere in the world via the web portal.

POD receipts were also scanned and filed within the ManagePoint system. smartFiling reads the information on the receipt and automatically attaches it the corresponding invoice. This also aids staff in dealing with customers as all relevant records pertaining to a customer are returned in a single search.

To ensure the continued synchronisation of information smartFiling was directly integrated with Pronto. This it provides at previously unprecedented levels of transparency for all staff.

With the data integrated and synchronised allows management to report on the number of Purchase Orders that remain unprocessed in one simple report. This in turn has allowed for the identification of bottlenecks and the improvement of workflows throughout the business.

The implementation of smartFiling has allowed staff at Royal Foods to significantly improve the way that information is handled within the business. The flexibility of the Redmap solution also provides the business an opportunity to continue to improve its document management capabilities and processes. This can be done in stages and at a pace set by Royal Foods ensuring that change management best practices can be met.

"The management at Royal Foods have always been keen to implement IT processes into the business if it allowed us to do improve timeliness, cost effectiveness and accuracy of the existing work processes. The Redmap solution fulfilled all of these criteria and has proved to be an extremely useful process tool in our Debtors Department. I know the staff wouldn't want to go back to the previous process methods."

Frank Hemelaar, Director | Royal Foods

Results

- Royal Foods staff now have comprehensive access to business documents without the previous inefficiencies of rifling through filing cabinets.
- PODs are scanned and stored within the system & can then be retrieved instantly at a customer's request.
- The Redmap implementation has enabled the business to use less paper and reduced the amount of office space required to store filing cabinets.
- Royal Foods staff no longer take paperwork home for filing and sorting.