



smartFiling

Simon George & Sons Case Study



The Business

Simon George & Sons is a fruit and vegetable provider with a focus on supplying premium quality produce to an established client base. Having been operating for over 60 years, Simon George & Sons now caters to establishments ranging in size from restaurants to cruise ships.

Simon George & Sons currently employs more than 300 staff and has offices in 6 different locations throughout Australia, with 3 of these offices in Queensland, 2 in Sydney and another in Darwin. Products are primarily sourced directly from local farms but Simon George & Sons has also formed strong relationships within each of the major national food markets for import purposes.

The Challenge

Copious amounts of paper-based documents were being generated for use within internal, manual workflows due to the size and expansion of the business. These included documents such as picking slips, Proof of Delivery (POD) dockets and various other paper-based forms used for the smooth and consistent operation of the business. Simon George & Sons found themselves in a position where the current filing and archiving procedures were insufficient. Their traditional document handling methods were excessively time consuming and often unreliable.

With this in mind Simon George & Sons decided to streamline their document storage process and implement a reliable document management system. In order to limit the risk, Simon George & Sons chose to implement a pilot within the Orders department with a view to company wide implementation. Regulatory requirements to retain documents for long periods of time meant the storage of paper a requirement. Being located in key CBD location meant that this paper could not affordably be stored on site rendering it's archiving to off-site facilities a major yearly task.

document management system



The Solution

Simon George & Sons decided to implement Redmap's ManagePoint solution to handle the storage and management of their documents. Initially this was confined to the Orders team within the Brisbane office. Within 2 weeks of committing to the project, Redmap's software was installed and being used. *"The process of finding documents became a lot simpler",* says Simon George & Sons Cost Controller, Jack George. *"We also saved a lot of storage space within the office. Within a couple of months of usage we were able to get rid of all file storage boxes."*

Once installed, the Orders team was able to scan documents such as picking slips and PODs and, using OCR and based on predefined templates, have them automatically filed within ManagePoint. Following its successful implementation within the Orders team, Redmap's solution was rolled out to other departments within the Brisbane office including Accounts and HR. It is now in the process of being implemented within each of the other 4 branches.

The document management process within Accounts was further streamlined by the addition of Outlook integration. Rather than having to save attachments and then file them by relocating the file, incoming attachments can now be filed straight from Outlook with the click of a button.

The Future

Implementation of Redmap software at Simon George & Sons has provided such extensive benefits that the business is now actively planning to implement yet another Redmap solution, namely *smartPayables*. *smartPayables* is a document automation tool that will initially be installed within the Accounts Payable (AP) department of Simon George & Sons. This will allow the time consuming, error prone and inefficient manual process of sorting, coding, posting and filing vendor invoices to be entirely automated.

Expected benefits for Simon George & Sons from the implementation of this software include reducing the cost of paying each invoice, improved throughput as well as complete visibility throughout the approvals workflow.

Results

- Simon George & Sons staff now have comprehensive access to documents within the business.
- 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.

"We've found Redmap to be a great time saver. It's worked so well in our Brisbane office that we're now rolling it out across our 4 other branches around the country and considering the future implementation of the smartSolutions software."

Simon George & Sons Cost Controller, Jack George

document management



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