Document Management in Linen Service

A modest investment in imaging technology can provide large returns in improving customer service and managing service company paperwork. For the best return on investment (ROI), start by imaging the documents that create the highest volume of paper and then attack the others. This means starting with invoices and contracts.

CROWN Linen Service Inc. (Nashua, NH) is using Safekeep, from Acordex Imaging Systems (North Andover, Ma), to improve customer service and reduce costs. Safekeep scans paper documents to create digital images, indexes documents and sustains a secure long term archive. Safekeep's integrated bar code recognition ties the document archive back to Crown's existing linen service system without any data entry.

INVOICE MANAGEMENT

Invoice paperwork is included with every delivery of linens, uniforms, mats and other items scheduled for each customer. If a customer's needs change at the last minute, the invoice paperwork is marked up on-site to reflect the actual delivery. Once everything is confirmed, the customer signs the invoice. Signed documents are returned to Crown's offices. Since there is one document (sometimes several pages) for each delivery, invoices create Crown's highest volume of paper.

Before Safekeep was installed, incoming invoices created a daunting sequence of collating, sorting, filing and retrieval tasks. Thousands of pages were sorted into customer folders each day so they could be found again later if needed. Now, the route accounting system automatically prints the invoice number in bar code on each invoice. When the invoices come back from the delivery vans, they are scanned with Safekeep's automatic document feeder, automatically indexed by their bar-coded invoice number and archived onto CD. The system can scan 1500 pages per hour with very little operator intervention. In fact, Safekeep is run by Crown's receptionist in between handling phone calls and greeting guests!

"Everyone loves the system," says Jo-Ann Sundstrom, Controller of Crown Linen Services. "Retrieval is very very easy. To get a signed copy of an invoice to support our Accounts Receivable collection efforts, you simply enter the invoice number and click the 'Print' button. The imaging system is smart enough to know that documents include both the customer's invoice plus a stub on one side that contains internal billing information." Safekeep asks whether this print is for customer or internal use, and then prints the customer invoice alone, or the entire document accordingly. Either way, the document is properly scaled to fit on normal letter size paper without any effort.

Previous to the installation of Safekeep, getting a copy of an invoice started with pulling a document from the filing cabinets and bringing it to a photo-

copier. If the copy were for the customer, then a blank sheet of paper was first placed on the copier's flat bed to mask off the internal data stub. If the copy were for internal use, the copier was set to reduce the page so it would fit on standard letter-sized paper. After the copy was made, the original document was brought back to the filing cabinets and re-filed in the correct place — a very important and error prone step. Finally, the person needing the invoice could return to his or her desk, copy in hand!

DOCUMENT CONTROL

Occasionally, a needed paper document was missing from the filing cabinets. "Although we did not do a study at Crown, the industry averages for well managed paper archives is 2% to 10% of the documents are missing," stated Kenneth Rohr, President of Acordex.. "With paper, there is no way to know whether a missing document is misfiled, or someone else has it or if it never came into the office to be filed."

With the document archive computerized, nothing gets lost. Once a document is scanned, it's in the archive forever. Unlike paper documents, retrieving an electronic document has no impact on the completeness of the archive.

MANAGEMENT TOOL

Even more powerful, the software confirms that all invoices sent out match invoices returned by the delivery vans. "The route accounting system knows what invoice numbers have been issued and Safekeep knows what invoice numbers have been returned from the delivery vans," continued Mr. Rohr. "Comparing the two provides benefits beyond improved customer service and lower labor costs. This gives upper management closed loop accountability that deliveries have been made and the paperwork has been returned. This is especially important for cash customers."

CUSTOMER FOCUS

Crown's second largest paper volume is customer contracts. As with invoices, Crown wants to give their customers instant response to requests for a copy of their contract. "This is all part of Crown's commitment to our customers," emphasizes Lou Flanders, VP of Sales and Marketing. "We're a service company. That means fulfilling all facets of the customer's needs. Our imaging system does its part in providing information to our customers when they want it. For all of the fine computer products we've used at Crown, Acordex stands out as providing the best combination of system quality, training and the support staff. Everything has been top notch."

The advantages of keeping contracts on Safekeep are to keep track of the current contract addenda as new services are added or modified and to provide an internal reference to ensure services are being furnished as promised. Customers and sales executives need these records when creating a new contract for subsequent years of service. All of these are facilitated by Safekeep's ease of appending pages to existing documents and its fast retrieval of documents that may have been added to over a long time period.

CONCLUSION

With Safekeep, Crown provides a faster response to customers' requests for information and spends less on labor. The labor savings generated an ROI of less than two years. By attacking invoice paperwork first, and then contracts, Crown has been able to quickly realize a financial benefit from imaging technology and then expanded its role throughout the organization. ❑