

DOCUMENT IMAGING FOR DISTRIBUTORS



The modern office environment is a breeding ground for cutting edge technology. CEOs review profit reports on wireless devices as they travel. Branch employees communicate with headquarters via thin clients and the Internet. Shipping personnel capture proof-of-delivery signatures on personal digital assistants (PDAs).

Why, then, is the average distributor still pushing paper, employing clerical staff to duplicate invoices on copy machines and collect documents in filing cabinets?

A document imaging application integrated with your enterprise software solution allows you to store documents in a digital environment, eliminating much of the time and aggravation associated with traditional paper filing. In addition, by automating and streamlining document storage, document imaging can decrease your company's dependence on clerical staff, which reduces overhead and sends more dollars to the bottom line.

COMFORT VERSUS CONVENIENCE

Despite the cumbersome nature of paper filing, many distributors continue to rely on the traditional paper/folder/filing cabinet method out of habit, as comfort takes precedence over speed and convenience. What they may not know, however, is that a good document imaging solution will reproduce the feel of a filing cabinet in a digital environment, organizing digital files into folders, documents, and pages.

With paper filing, distributors must employ clerical staff to gather documents and file them by hand. And if a document, such as an invoice or pick ticket, needs to be retrieved, employees have to spend time leafing through a filing cabinet. A document imaging solution eliminates much of the time wasted on such activities.

To file documents electronically, an employee just has to load them in a scanner and define how they should be indexed – the solution takes it from there. Then, when it comes time to retrieve a document, employees can call it up with a quick keyword search and reproduce the document in its original form.

AN INSIDE JOB

Document imaging can also simplify the process of filing internal documentation. Whereas a traditional filing method sees distributors photocopying and manually filing pick tickets, document imaging utilizes Computer Output to Laser Disk (COLD) functionality to automate the process. COLD sends pick tickets, invoices, etc., to your imaging server and files them according to your templates.

Optical Character Recognition (OCR) represents another way document imaging reduces the need for manual intervention when filing. Technology that reads an image and converts it to text, OCR can batch capture and index mailed, faxed, and handwritten documents – no reading, searching, or cross-filing needed.

And speaking of cross-filing, document imaging simplifies the handling of delivery documents (i.e., packing lists containing customers' signatures and notes). By incorporating barcode technology that matches up returned documents with their corresponding originals and files them together, a document imaging solution eliminates the need for manual cross-filing.

FINDING LOST TIME

A third-party application that integrates with Activant Prophet 21™, IMIGIT document imaging solution acts like an electronic filing cabinet, organizing files into cabinets, folders, documents, and pages, while enabling users to create custom indices with searchable keywords. Traditionally, when an office collects a batch of invoices from a supplier, everything needs to be copied – often in triplicate – and filed by hand.

With IMIGIT, an employee only needs to load those invoices in a scanner, define how they should be indexed (by supplier, by date, etc.), and the application does the rest. The time required for filing is reduced, allowing that employee to focus on more important tasks, and the costs associated with copying and filing hard copies (paper, cabinets, etc.) are significantly lessened.

IMIGIT can also reduce the amount of time it takes to search for a requested document. Instead of walking their fingers through endless file cabinets, employees can call up documents with a quick keyword search in the solution. In addition, they can reproduce the document in whatever form it was originally received, whether as paper, a fax, or an e-mail attachment.

COLD CAPTURING

Distributors who do not utilize a document imaging solution also have to deal with documentation created internally, and just as with supplier invoices, they mostly resort to printing, photocopying, and filing by hand. IMIGIT simplifies this process with COLD.

For example, instead of photocopying and manually filing a pick ticket, an employee can electronically capture the document with COLD. Functionality that allows your solution to communicate with your imaging server as if it were a printer, COLD stores pick tickets, invoices, etc., and indexes them according to user-defined templates, virtually eliminating the need for manual intervention.

COLD can also be used to capture and store the myriad day-, month-, and year-end reports you produce, which makes them searchable by the information they represent (i.e., customer number, SKU, etc.). That means you can find and print only the specific data you need, instead of having to contend with bulky paper reports.

IMIGIT also contains an OCR module, which converts bit-mapped images into text documents. While not as accurate as COLD, OCR can streamline the process of filing mailed or handwritten documents, as it batch captures and indexes them according to your templates.

TIME AND MONEY

As a rule, when saving documents electronically, the original image cannot be changed. IMIGIT provides annotation capabilities – including underscoring, single line text, electronic “sticky notes,” and the ability to block out confidential information – to help you maintain control over the documents you file.

IMIGIT also enables you to capture delivery documents, so when you scan in signed delivery tickets, invoices, or pick tickets, the solution will match them up with the corresponding electronic copies already in your database.

For example, when distributors ship items to their customers, they need to include a packing list in the shipment. With IMIGIT, packing lists – or any other document – can be printed with a barcode. This way, if a list comes back with a customer’s signature or notes, a user can scan the hard copy and IMIGIT will read the barcode, automatically archiving it with the original packing list.

The IMIGIT application includes modules for scanning, indexing, searching and retrieving, printing, faxing, viewing, OCR, e-mailing, making notes, and saving archives to CD media. By integrating IMIGIT to its Windows-based, SQL server solution, Activant offers all Prophet 21 users the ability to drastically cut the time and costs associated with paper filing, and focus their resources on more important areas, like customer service and the bottom line.

For more information about Activant® and its solutions and services, please call 1-800-776-7438, press 2, e-mail distribution@activant.com, or visit www.activant.com

ABOUT ACTIVANT'S WHOLESALE DISTRIBUTION SOLUTIONS

Activant provides technology solutions and services to more than 3,800 wholesale distributors throughout North America. A leading technology provider for the distribution industry, Activant develops comprehensive enterprise software solutions to help distributors improve customer service and maximize the return on their technology investment. In addition, the company offers an Internet trading network that expedites sourcing, expands geographic reach, and streamlines transactions between distributors and manufacturers. Activant solutions are backed by a host of professional services, including support, consulting, and educational programs.

Activant Solutions Inc. ("Activant") is a leading technology provider of business management solutions serving small and medium-sized retail and wholesale distribution businesses in three primary vertical markets: hardlines and lumber; wholesale distribution; and the automotive parts aftermarket. Founded in 1972, Activant provides customers with tailored proprietary software, professional services, content, supply chain connectivity, and analytics. More than 30,000 customer locations use an Activant solution to manage their day-to-day operations. Activant has operations in California, Colorado, Connecticut, Illinois, New Jersey, Pennsylvania, South Carolina, Texas, Utah, Canada, France, Ireland, and the United Kingdom.

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