> " With KwikTag, we are able to give managers in 14 locations instant access to all invoices and purchasing documents that were previously locked up in paper file cabinets at our corporate headquarters. "

Carol Hathaway, VP – Finance Tolt Service Group

kwiktag® for Microsoft Dynamics® NAV

Tolt Service Group | Tempe, Arizona

Customer Profile:

Tolt Service Group

The Tolt Service Group is a single source provider of managed services for business technology equipment. Tolt's nationwide network of technicians, installers and project managers specialize in on-site break/fix repair, depot repair, rapid technology deployment, technology upgrades and more. With over 300 employees, Tolt services clients across the United States.

The Challenge:

Customer Service

Tolt faced a challenge that is familiar to many companies with locations dispersed across the country. They needed the ability to electronically share documents among multiple locations in real time. Tolt's finance department is located at their corporate headquarters in Tempe, Arizona, but division managers are located elsewhere. Invoices are generally sent to the finance department in Tempe, but the Accounts Payable department needed division managers approval before they were posted to the managers' Profit and Loss (P&L) statements and paid. Many division managers expressed concern with this process because they had no opportunity to reconcile incoming invoices with their anticipated expenses. As a work-around, many managers would have the invoices mailed or faxed directly to their offices, which slowed down the time-sensitive accounts payable process.

In order to improve this process, Tolt wanted a solution that would allow division managers to view and approve invoices quickly. Tolt also recognized that too much time and too many resources were being spent on the process of filing and retrieving paper files, which could otherwise be assigned to more important financial functions.

Overview

Summary

With locations dispersed across the United States, Tolt Service Group needed a way to electronically store and share purchasing documents with their division managers. By integrating Kwik-Tag with their ERP system (Microsoft Dynamics NAV), Tolt is able to centralize the accounts payable process at their corporate headquarters, while providing instant access to their managers in satellite offices.

Department

Finance
IT

Documents Scanned

Invoices
Packing Slips
Purchase Orders
Back-up Purchasing Documentation
IT Department Library

Solution

KwikTag for Microsoft Dynamics NAV
KwikTag Basic

The Solution:

Paper-to-Digital

Carol Hathaway, Vice President of Finance, and Valerie Barkley, Accounting Manager, set out to find a document imaging and management system that would allow them to store and share purchasing documentation across the entire organization. Initially, Tolt outsourced the scanning and storage of their documents. After a series of mergers, a new unknown company was assigned to manage this function. Barkley hesitated, "It was taking too much time for a third-party to receive, scan and post our time-sensitive invoices. Additionally, we began to have concerns because invoices that had been sent for scanning were not available to view." Hathaway and Barkley began to explore other viable options. The engineer from their Microsoft reseller, who supported their Navision ERP system, recommended they look at KwikTag. Once they saw the demo, Hathaway and Barkley felt that KwikTag would allow them to handle their document management in-house and it had the added bonus of seamless integration with Navision. Hathaway explains, "The simplicity of KwikTag was the real selling point. It could integrate with Navision and our existing business processes without added work or resources."

Tolt was ready to get moving on this new system and installed and trained users in just two days. There was virtually no learning curve and the staff was able to incorporate KwikTag into their existing payable processes quickly. Documents are now available immediately from within Navision and through a portal on Tolt's intranet for employees who are offsite without access to Navision. After the success in Accounts Payable, the Accounts Receivable department soon began using KwikTag. Tolt has also begun scanning past purchasing documents to create a central electronic repository, all without hiring additional resources.

The benefits of KwikTag have become immediately apparent and the challenges division managers were facing have been improved markedly. They can now instantly view all pending invoices and resolve any issues before they are charged to their P&L statements. "The division managers are thrilled and we have helped alleviate the invoice discrepancies we experienced in the past," remarks Hathaway.

In fact, the results in the finance department and the reaction of the division managers have been so positive, that other departments at Tolt have begun to look at ways to use KwikTag to help improve their processes. The IT department has started using KwikTag to house their technical documentation, while the HR department is in the process of evaluating KwikTag as a repository for storing personnel records and other HR files.

Results

Increased Productivity
With KwikTag each purchasing document only has to be touched once. After it is scanned, it resides within Navision and the KwikTag portal for on-demand access. No more wasted time spent filing, faxing and re-filing.

Real-time File Access
By storing all purchasing documents electronically, a division manager across the country can instantly access a purchase order or invoice without ever leaving their desk or querying the Accounts Payable department.

Maximized Office Space
Documents no longer have to be filed in paper file cabinets. Once they are scanned, they are immediately boxed and sent to an onsite storage facility – saving precious filing space within the finance department.

Improved Security
By centralizing the receiving and scanning of payable invoices through the finance department, documents are not misplaced and the integrity of the documents can be assured.

Applications Across the Enterprise
The implementation of KwikTag within the finance department has sparked other departments within the organization to find innovative ways to streamline their operations and gain the benefits of a digital repository.

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kwiktag® Microsoft Dynamics NAV

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