

Tri-State Wholesale Flooring Decreases Storage Space and Increases Staff Efficiency With Document Management Software

Since 1994, Tri-State Wholesale Flooring (TSF) has served retailers throughout South Dakota, Minnesota, Iowa, Nebraska, Wyoming, and Montana. As the company continued to grow, expansions were made to meet the rising demands of retailers. With this growth came a new facility and plenty of new paperwork. From approving and sending invoices to filling out documentation for purchasing, Tri-State Wholesale Flooring saw a substantial increase in the amount of paperwork being processed on any given day.



Unorganized Bankers Boxes

In order to maintain all of this paperwork, TSF stored their documents in bulky, unorganized bankers boxes which consumed seven pallet spaces or more

depending on the year. Since the majority of their documents had a retention policy, TSF was obligated to keep these documents for at least seven years. Considering the amount of paper that can accumulate over time, TSF opted to store their documents in the warehouse that housed their flooring materials. These boxes of documents occupied warehouse space that could have been used for product. Along with their lack of storage space, TSF noted a considerable increase in employee time spent looking for documents.

When a customer called TSF, inquiring about a recent flooring invoice they received, the document they referenced was filed a few months back, and has since been moved from the office to the warehouse into a bankers box. After placing the customer on hold, TSF staff would head over to the warehouse and ask a warehouse employee to bring down all of the bankers boxes that are on the shelving unit. They'd begin to look through them for the specific invoice the customer is speaking of. Fifteen minutes later, they were finally back on the phone with the customer, answering all of their questions. **Now, imagine this process taking 30 seconds instead. In that moment, TSF knew they needed a digital document solution to help increase their daily efficiency.** With Square 9's enterprise content management software, GlobalSearch®, all business documents are digitally stored into the system for immediate search and retrieval. Greatly improving customer service,

Snapshot

Industry:
Flooring

Departments Impacted:
Inventory Control, Accounting, Purchasing, Customer Service

Featured Products:
GlobalSearch, KeyFree Indexing

Objectives:
Save space from paper storage and increase staff efficiency by reducing the time spent searching and retrieving business documents.

GlobalSearch enables any document to be right at the fingertips of TSF employees.

With the help of GlobalSearch, TSF is now able to immediately scan all of their documents into their system for safekeeping. **And with about 200 documents needing to be scanned per day, this saved a considerable amount of time in manual data entry and filing.** With a simple point-and-click methodology, the KeyFree Indexing feature allows TSF to no longer have to type in all of their index data for search queries, drastically improving search time and accuracy. TSF also found it beneficial that they could search across many document types, archives, and folders. The solution TSF used prior to GlobalSearch did not have any of these capabilities, causing inefficiencies that TSF didn't even know they had until the switch occurred.

Since the implementation of GlobalSearch, TSF no longer uses any bankers boxes for storage. The warehouse space that once housed the bankers boxes now stores flooring materials and revenue-generating products, enabling the company to maximize their space and better prepare for large, bulk orders. They've also seen considerable improvements in workflow and productivity. Not only are staff able to quickly and efficiently scan needed documents, the document chase is now virtually non-existent.

For more information on Tri-State Wholesale Flooring, visit <http://tsf.com/>.

200
Documents
Scanned
Daily



Interview: Lisa Rusch

Director of Finance, Tri-State Wholesale Flooring, Inc.

Q. What criteria did you have in mind when searching for a document management solution?

Lisa Rusch: We were definitely looking for something that was easy to use. GlobalSearch's KeyFree Indexing feature intrigued us when we saw how intuitive and accurate it was. The prior solution we had didn't offer such a simple to use solution like that, as we were still manually typing everything. We really liked the idea of how KeyFree Indexing allows us to effortlessly highlight data, and not rely so much on typing. This feature alone was a stand-out amongst other competitors.

Q. How is your company leveraging GlobalSearch and which departments are using it daily? How is the solution being used?

Rusch: The main departments that are using it would be our accounting department, purchasing department, customer service and the warehouse. The main function of GlobalSearch is saving a bunch of documents like invoices from our accounts payable vendors. We'll scan them into our system and with our index fields, we'll save them by vendor name. We also have the capability to select our purchase order number, invoice number, and invoice date. So that once a document gets scanned in and saved, we'll have a search query to look for those documents. It's mainly what we're doing each day.

Q. How have your processes changed in each department since implementing GlobalSearch?

Rusch: We save time searching for documents because we don't have to go out to the warehouse and have somebody pull the pallet down and get the box if we need it. It probably took about 4 people to be involved with the bankers boxes. From filing things away and getting them all in the warehouse to having the warehouse lift them up and put them on the shelving unit. With GlobalSearch, there are less people working on it. Now, there are 2 people working on document management. It could even average out to one person a day.



“Anytime I've worked with the Square 9 staff - they've been efficient in getting back to me, prompt, and they've kept me in the loop. I would say the experience has been very positive.”

- Lisa Rusch

Tri-State Wholesale Flooring, Inc.

Q. Would you recommend Square 9's solutions and why?

Rusch: I would recommend Square 9's solutions. With GlobalSearch, it is very quick to find data when typing in keywords and using KeyFree Indexing. We also save storage space and it makes searching for documents more efficient on our end. Multiple people can look for documents at the same time. Additionally, anytime I worked with the Square 9 staff they've been efficient getting back to me, prompt, and they've kept me in the loop. On the last call I had, the Square 9 employee was very helpful. He walked me through how he was going to remote in to my desktop and solve all of my problems. I would say the experience has been very positive.