

GlobalCapture® Enables Distributor to Produce High Quality Data to Deliver High Quality Goods

Kuna Foodservice started in 1918 as a small, family-owned butcher shop in St. Louis. Nearly 100 years later, they are one of the largest independent and privately-owned foodservice companies in the Midwest today.

While Kuna takes pride in serving local restaurants, regional chains, and national partners, the high-volume of paperwork accumulated throughout their longevity has led to various business challenges. From invoices, to purchase orders, bills of lading, and more, over a century's worth of documents had confiscated Kuna's office space, slowing access to business information. Kuna knew that the search and retrieval of incoming and existing documents had to become a much simpler process. In search of a cost-effective solution that would enable Kuna to achieve the benefits of a paperless office, the foodservice company began researching document management software and the benefits of process automation.

After implementing GlobalSearch®, Square 9's Enterprise Content Management system, Kuna quickly eliminated over 25 file cabinets by digitally storing paperwork. **With automated document workflows Kuna is saving 15 hours a week, eliminating time spent digging through thousands of paper documents.** Through Optical Character Recognition - a feature that turns content into searchable and editable data - accessing documents and resolving accounting issues is more efficient, bringing users directly to where an error occurs. Also, with File XChange, Kuna's Marketing, Accounting, and Services departments can search, view, edit and save documents from their everyday business applications, such as Microsoft Word® and Excel®, making collaboration more effective.

GlobalCapture, Square 9's Document Capture Automation solution, also played a vital role in helping Kuna go paperless. Before GlobalCapture, Kuna's Accounting team was manually scanning 50-100 invoices daily for each vendor, and the Services department was filing around 200 paper copies. **With document capture automation, employees are saving around 20 hours per week scanning invoices into GlobalCapture, resulting in a 20% increase in productivity in the Services department and an additional 10% on filing alone.**

But beyond document capture, Kuna uses GlobalCapture to validate captured information by

Snapshot

Industry:
Food Distribution

Departments Impacted:
Marketing, Accounting and Services

Featured Products:
GlobalSearch, GlobalForms, GlobalCapture, File XChange

Objectives:
Automate filing, search, and retrieval of invoices, purchase orders, and bills of lading - eliminating all hard copies - so extra storage space is no longer needed.


moving PDFs output from their ERP system to a GlobalSearch "hot folder." As a PDF is imported into the system, GlobalCapture separates the checks into single pages, and then, using custom templates, OCR indexes the fields and releases them to a secure GlobalSearch Archive.

With proven success from both GlobalSearch and GlobalCapture products, Kuna then implemented Square 9's GlobalForms® Web Forms Management. Alongside two of Kuna's home-grown applications, GlobalForms has eliminated the need for paper-based employment applications, marketing forms and requests. **Saving Kuna \$5,500 annually, custom eForms have been created to collect submitted data, including new customer account information and credit applications.** The system then auto-fills index fields based on key pieces of data, eliminating repetitive manual data entry. Even the Equipment Service technicians use GlobalForms to report their service calls when out in the field, directly from their tablets.

Over \$5K
Saved
Annually



Kuna is thrilled with Square 9 solutions and how easy it has been to develop document automation that fits their office and production needs. Currently in the process of implementing Hire to Retire, Square 9's Human Resources Automation solution, Kuna plans to expand and increase the use of GlobalCapture for project proposals, estimation, and approvals while also automating some additional marketing forms and requests. For more information on Kuna Foodservice, please visit www.kunafoodservice.com.



20%
Increase in
Productivity

Interview: Tim Boyle

IT Manager, Kuna Foodservice

Q. What business challenges led you to Square 9's software solutions?

Tim Boyle: Now that we're such a large company, we have many more invoices, purchase orders and bills of lading that come through the office daily. We were constantly searching through file cabinets trying to locate the right documents. Because we kept hard copies of everything, it resulted in a lot of paper that took up a lot of space. We wanted to look for a cost-effective solution that would reduce onsite storage while also making the filing, and search and retrieval process faster and less tedious.

Q. How have daily processes changed since implementing Square 9's solutions?

Boyle: Our biggest initiative was to go as paperless as possible. Before, paper costs for applications were around \$450 per month, but now with Square 9's solutions, we have eliminated about 25 filing cabinets and were able to add cubes for our growing company. Before implementing Square 9's solutions, the Service department would spend almost 20 hours a week, filing paperwork away. Now, GlobalSearch, GlobalCapture and GlobalForms have eliminated paper in the Services, Marketing and Accounting departments, saving them a combined 25 hours per week, and filing is no longer a concern.

Q. In what ways has Square 9's product suite improved business performance?

Boyle: Now that production is using GlobalCapture in the Accounts Payable, Receivable and Services departments, check information is easily captured and imported as a PDF and then released into an Archive. In addition, we had been manually scanning and moving signed invoices to folders by vendor in case there were any problems. But now, they are scanned into the system instead of being typed in by hand. This was a huge time and costs savings. Before we were manually scanning and filing hundreds of invoices, but now that we have GlobalCapture we can scan the same amount of



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— Kuna Foodservice

paper and OCR goes to work for us, creating index fields automatically and releasing them to where they need to be in the archive. This in turn has eliminated manual data entry errors and resulted in huge savings for us!

Q. Would you recommend Square 9's solutions?

Boyle: I am a big fan of GlobalForms and GlobalCapture because of how simple it is to develop document automation solutions to fit many needs in our office and production environment. The common interface across all documents, enterprise-wide, makes it simple to retrieve records as needed while the diversity of the platforms, including File XChange, makes it easy to pull documents from many locations and applications. This in return, has truly streamlined our productivity.