

GlobalSearch® Is The Solution That This Global Powerhouse Won't Trade!

Sandler & Travis Trade Advisory Services (STAS) is a trade management service provider who works with clients to comply with all rules, laws, and regulations of international trade. They are currently operating in more than 220 countries and territories worldwide, with a matchless set of transportation, logistics, and supply chain services. Their services maximize trade investments and minimize complexity, time, and cost, throughout their internal supply chain operations.

To widen their portfolio of brokerage services and provide a larger international footprint, STAS was recently acquired by UPS. With this major acquisition, STAS was experiencing fast-pace growth, making it difficult to keep up with the inflow of documents. Their growing pains were directly affecting the STAS operations team, which manually files and organizes all customer forms into physical storage boxes for import and export. Locating and extracting critical business data off these documents proved time-consuming and inefficient.

To simplify their paper-based processes, STAS was looking for a way to store customer forms in a secure and easily searchable digital format. STAS needed a way to automatically index certain fields within the documents to streamline data entry and document indexing. The company started their hunt for a document management solution with Optical Character Recognition (OCR) technology that was accurate, scalable, and easy to use. Finding that previous solutions have been less favorable, and OCR proved inaccurate, they were hoping to find a solution to overcome their unique data extraction challenges.

Square 9's document capture automation software, GlobalCapture, was just the solution STAS was looking for. GlobalCapture has allowed STAS to build custom document templates and workflows that cater to the unique nature of their forms. **With the powerful OCR-assisted capture solution,**

key pieces of data are automatically extracted for processing saving employees the hassle of manually index each one. This has replaced inefficient paper-based processes and has enabled STAS to save over 150,000 pieces of paper from being printed.



Reduced Paper by 150k Pages

Snapshot

Industry:

Global Trade Management

Departments Impacted:

Operations, Analysts

Featured Products:

GlobalSearch, GlobalCapture, Zonal OCR

Objectives:

Leverage a document management software with Optical Character Recognition (OCR) that was accurate, scalable, and easy to use.

Another selling point was the scalability of GlobalCapture and how features can be easily added on as the need arises. STAS quickly acquired Zonal OCR, which changed the way they set up document templates. Zonal OCR allows users to pinpoint a specific string of text and set coordinates based off the direction or position they name the field at. Clients can send all their documents to an archive where they are automatically classified using Zonal OCR.

With GlobalCapture, STAS saves time by filing large batches of forms all at once. Clients can also automatically route their documents to a specific digital location where they are organized and stored - no physical effort required! **These new processes have saved STAS upwards of \$1,500 per month in storage fees alone and \$2,000 per year on printer costs, equating to a total of \$20,000 saved every year!** Best of all, STAS aims to increase that number as they continue transition of their paper-heavy processes.

**\$20k
Saved a
Year**



Sandler & Travis Trade Advisory Services has finally met their match! Square 9's award-winning solutions have automated their paper-intensive processes and accomplished their unique OCR challenges, resulting in money and time saved. For more information on Sandler & Travis Trade Advisory, please visit www.sttas.com.

Interview: Tim Flutur

US Technical Manager, Global Technology Services Team, Sandler & Travis Trade Advisory Services

Q. Are there any specific Square 9 products or features that have proved to be the most beneficial?

Tim Flutur: The GlobalCapture document capture automation solution has allowed us to build custom templates and workflows to cater to the unique nature of our forms. We can accurately use OCR to capture the required fields to index and store the documents in a digital format. This has reduced the time spent manually indexing each document. Once documents are stored, we can quickly search and retrieve resulting in increased efficiency. Previous attempts using OCR for these specific forms have yielded less than acceptable results.

Q. How have your processes changed since implementing GlobalSearch document management?

Flutur: Information is now readily available at our fingertips! We no longer wait for a physical box containing a specific document to be delivered when we need to “pull” a file. This provides our analysts and operational managers with immediate access to the data they need, without having to wait for the delivery and sort through a paper box full of documents to find the specific document they are looking for.

Q. What are the benefits of using Zonal OCR? How has your company gained efficiency by adding this feature?

Flutur: Zonal OCR has changed the way we set up our document templates by allowing us to pinpoint a specific string of text and set coordinates based off the direction or position we set the field at. Considering we work with multiple documents and templates, specific data is automatically captured no matter it's placement on the document. This allows us to process the slightly unique forms the same as the identical ones, allowing client's individual brokers to dump all the forms in the same bucket for us to process in the same workflow.



“ Square 9 was the only company we worked with that was able to provide an accurate OCR solution to automate the processes we were hoping to replace. ”

- Tim Flutur
US Technical Manager

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

Flutur: Yes, I would recommend Square 9 products for any company with a unique OCR challenge. Our previous forays into the world of OCR did not result in accurate enough results to justify the transition of the process. Square 9 was the only company we worked with that was able to provide an accurate OCR solution to automate the processes we were hoping to replace.