

# “AutoFORM Archive does what software is supposed to do—make our life easier!”

## Overview

### Challenge

To create an online repository for all outgoing & incoming business documents.

Link document images to System21 workflows

### Scope

500,000 documents archived per year with immediate retrieval

### Key Benefits:

**System21 CRM:** Improves customer service with ability to email copy company registration documents whilst customer is still on the phone.

**System21 credit.diary:** easier credit control administration integrated onscreen viewing of outgoing invoices.

**System21 purchase.ledger:** Faster resolution of purchase invoice queries with integrated invoice images.

Improves business efficiency with faster access to document information.

Across the business each department is reducing man hours by up to two days per week.

### Applications

Integrates with System21 & System21 Aurora & Microsoft Office

Archives System21 output, PDF, MS WORD, Excel, email & faxes

### Solution

AutoFORM PDM

### Why AutoFORM?

Recommended by Infor for System21  
.NET Client & web-browser technology  
Speed of Search & Retrieval



**Faster desktop access to electronically archived documents is leading to more efficient working practices at legal services providers, Jordans.**

### Jordans-1st Company in UK to Register Companies Online

Whilst the law is considered a very paper oriented business, Jordans take a very forward thinking approach to using information technology to manage documents electronically to the benefit of their customers. In 1988, they were the first company in the UK to be licensed to store company registrations electronically and indeed Jordans helped Companies House to develop its own e-filing service. Since then Jordans have expanded their online services to property conveyance searches and banking 'know your client' reports for anti-money laundering investigations.

### Limitations of Scanning Only Solutions

Jordans wanted to extend this fast response to legal questions to resolving their customers queries on invoices and deliveries. However their stand alone scanning solution was causing some difficulties. Mike Greig, IT Development Manager, comments: "Whilst scanning made it easy to electronically archive documents - it was *finding* them again that was the problem! The difficulty was that each department, indeed each person, had their own idiosyncratic method of filing & indexing. If you needed to view a document you had to know which of several thousand directories it had been scanned into.

*Our old scanning solution made it easy to store documents. The problem was finding them again!*

## Output & Document Management

### Fast document retrieval from AutoFORM

AutoFORM PDM with its automated archiving, scanning, search & retrieval module for System21 has overcome these difficulties. This allows documents to be viewed and shared across the business. Mike Greig continues: The advantage that AutoFORM offers is the speed of search and retrieval. This in turn relies on AutoFORM's ability to capture the indexing information from System21.

### Index integration from System21 = Fast Retrieval

It is the bi-directional indexing links between System21 and AutoFORM that make the archive so useful. AutoFORM captures multiple classifications for every document generated by or logged into System21: so that it can be searched for by the customer-supplier account reference, name, postcode, the date generated or received.

### Search a million documents in a few seconds

Each year AutoFORM is now automatically indexing and archiving

300,000 customer invoices;

12,000 purchase invoices,

78,000 incoming payment cheques & associated remittance notes

*Plus* a host of individual department documents

Any one document can be found within a few seconds. "Now AutoFORM takes care of the indexing—retrieval has become a doddle!" says Mike Greig.

### Integrates documents with System21 workflows...

What is more AutoFORM enables links to be automatically created between System21 ledgers and the supporting documents. For example, supplier invoices can be viewed from the purchase & general ledger and outgoing invoices & the reciprocal payment cheques, from the sales ledger *and* the individual customers account.

### ...And Microsoft Office Documents

Another particularly useful facility is the ability to drag, drop & link documents generated or held in Microsoft Office (including PDF's, emails & faxes) to AutoFORM so that they can be viewed from the customer or suppliers account in System21. Jordans are finding that this is particularly useful for company registration filings as the documents tend to be in a number of different formats, such as MS Word, HTML and PDF. AutoFORM enables them to be viewed via any desktop with a web-browser (given the right password controlled access authority).

*Retrieval is  
a doddle,  
when  
AutoFORM  
takes care  
of the  
indexing!*

### .NET client & Web-Browser = Scalability

Andy Moore comments. "Another reason for selecting AutoFORM is that uses both .NET and web-browser technology. This means that everyone in the company can login into the archive without the IT department having to load the software on every desktop. The AutoFORM .NET developer tools also means that our own IT department can create a number of simple individual department archive solutions, which we deploy via our secure online networks. For example, we recently created an application for the Conference Management Team that allows conference evaluation forms to be searched for by speaker, subject, hotel, transport, customer and a number of other criteria without having to trawl through a number of archive boxes. This is saving this extremely busy department about two man days per week."

### The Benefits?

"What are the benefits? Immeasurable!" says Andy Moore, Finance Development Manager. "The cost savings of electronic storage compared to hard-copy filing are well recognised, but they are only a minor element of the business benefits that AutoFORM delivers. The faster, easier access to document information is leading to more efficient, productive working practices right across our business, from business from accounts payables to credit control."

### Improves Customer Service

Andy Moore continues: "You shouldn't underestimate the value of being able to retrieve documents at the point of need. Imagine the favourable impression given to a company director wanting to check his articles of association during a takeover bid – and the value to him of being able to have them in his email box as soon as he calls. You could spend thousands on advertising for less of a result!"

### Credit.diary. Resolve Invoice Queries—Quickly

Another area that has benefited considerably from AutoFORM is Jordan's Credit Control department. Outgoing invoices are automatically linked to System21's credit management facility, credit.diary. The credit controller can view the invoice onscreen—resolve any query—email a copy—and agree a payment date all within one phone call. At a stroke, AutoFORM eliminates the costly delays associated with the ring-back rigmarole and ensures that invoice queries do not result in payment delays.

### Every Department Saves Two Man Days Per Week!

Mike Greig concluded: "The comment that is repeated in every department is that AutoFORM makes computers do what they are supposed to do—make life easier.

### Highly Recommended to Other System21 Users

"Yes we would thoroughly recommend AutoFORM to other System21 users. AutoFORM unlocks the information normally held in documents, on servers, in filing cabinets, email directories and hard-drives, creating a single online repository of business documents that can be assessed (given permission) by any member of staff via System21 or their web-browser. AutoFORM has proved to be a very worthwhile extension to the System21 suite."

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