

Document

Management

Case Study



S4i Systems, Inc.
616 South El Camino Real
Suite M
San Clemente, CA 92672
949/366.5234 ph
800/231.5280 ph
949/366.5338 fax
www.s4isystems.com

Replacing paper documents with electronic ones results in reduced labor, material expense, and better communication, customer service, and risk management.

The foodservice industry is highly competitive. Most vendors sell similar quality merchandise at a low margin of profit. Without room for aggressive pricing, Stanz looks for new ways to offer its clients more value.

S4i Forms Automation Helps Foodservice Vendor Deliver Top Shelf Service

Stanz Foodservice extends the functionality of its ERP system to gain additional operating efficiencies

Brothers Emil and Henry Stanz started a foodservice business with just \$500 and a small truck. In 1923, their fledgling distribution operation was small, but both men had big plans. Today, the University of Notre Dame is a Stanz Foodservice client along with 3,500 other institutions in Indiana and Michigan.

The foodservice industry is a competitive one-- most vendors sell similar quality merchandise at a low margin of profit. Without room for aggressive pricing, Stanz looks for new ways to offer its clients more value. Technology centered solutions are used by Stanz to improve responsiveness, facilitate consultative selling, and reduce the cost of doing business. An advanced ERP system that resides on an IBM eServer iSeries model 810 is used to support this business model.

In August of 2003, a document automation

documents on four part, pre-printed forms weren't helping Stanz make a good impression with customers. Drivers who would travel as far as 125 miles from Stanz's 100,000 square foot warehouse in South Bend, Indiana, were forced to have customers sign off on invoice pages that were muddled because of poor print quality. And, it was hard make adjustments when customers choose to return items because duplicate notations had to be made on several pages.

Exasperated, Gaddie set his web browser to 'iSeries Document Automation' and found several, potentially suitable options. Before settling on S4i Express, he mounted an exhaustive study of the features and functionality of all suitable products in the document automation category. "I decided the amount of time needed to set up S4i Express was a little more than other

"Because of S4i Express, we are more responsive to our customers, and we affect better overall customer satisfaction"

Mark Gaddie, Vice President of Information Technology Stanz Foodservice

solution from S4i Systems, Inc. (www.s4isystems.com) was integrated into their Retalix ERP system to produce purchase orders, statements and other important documents containing electronic forms including invoices on blank, two part NCR forms stock with common HP laser printers. "Because of S4i Express, we are more responsive to our customers, and we affect better overall customer satisfaction," says Mark Gaddie, Vice President of Information Technology at Stanz."

Two years ago, Gaddie vetted complaints from drivers about the marginal quality of the second, third, and fourth pages of invoices that accompanied shipments. The IBM impact printers used to produce these

solutions but it was worth it because, once S4i Express was configured it was more flexible than the other options. I could tailor it to our operations rather than conform to its constraints."

It wasn't so much a matter of having more flexibility with the appearance of the forms, because, he says, "Every system allows you to design your own form. S4i Express offered more flexibility in how we wanted a specific form to work, from the way it processed data from spool files, to the order in which the pages were printed." Gaddie was also considering an electronic document imaging system as a future project and felt that S4i Express would be more compatible with S4i's ImageXP, than another vendor's solution.

The unchallenged reliability of the iSeries came into play too. Says Gaddie, "Our customers really count on us to come through. I wanted a solution that completely resided on the iSeries. If invoices don't get printed, then trucks don't leave the warehouse and our customers don't get their supplies." In overhauling the document creation process Gaddie also wanted to streamline shipping, and reduce the amount of time drivers spent going through invoices with customers once the order was unloaded. He wanted to print two copies of an invoice's first page, and then have the printer's stapler bind them together. The same process would be repeated for all subsequent pages until a complete set of shipping documents were finished for each order. This would let drivers and customers go through the orders and make adjustments to the top copy of each page, and then initial it. If instead, they printed all the pages of an invoice consecutively, and then printed a duplicate set separately, the drivers would have to make notations on both copies.

Refining the invoice generation process would make it easier to get hundreds of orders staged so drivers would be ready to go when they showed up at 4 a.m. According to Gaddie, "S4i could make this happen, and that's why we settled on S4i Express. They even developed a couple of features specifically to accommodate us."

For Stanz, S4i Express also eliminates the need for an operator to manually change the preprinted forms in the printer from Invoices, to Shipping Manifests and other documents that accompany orders. Since the forms stock now loaded into the printer is blank except for terms and conditions printed on the back, S4i Express can automatically change documents by changing the template that gets merged with the spooled report data. Gaddie explains, "This is a huge advantage. We can change forms at will and an operator can handle it. It has really simplified things and the paper is less expensive."

Sometimes busy vendors don't share their customer's sense of urgency when inevitable uncertainty looms over a new product installation and slows progress. Says Gaddie, "S4i helped us with a couple configuration problems over the phone and their tech support was excellent. They are a notch or two above the industry standard for support. It was nice that they took the time to train a new administrator when the one who was trained initially left. They didn't charge us for this, they just did it so I wouldn't have to do it myself."

Several other processes that involve information sharing have been automated too. At one time, when customers would ask for an order history report, they would print it off on green bar, place it in an envelope and mail it. An operator would have to import a text file into Excel and perform several other time consuming steps. "Now we can email to them and it really doesn't take any time at all," says Gaddie. To fulfill requests for copies of invoices and purchase orders, an office worker had to print copies, walk over to the fax machine with them and feed them through. "With S4i Express, once we select an email address and the product does the rest. You go through and set it up in S4i Express one time and you're done. 90 to 95% of the time we already have the report defined in the Retalix system. S4i Express can convert it into a PDF or Excel file and send it off."

Gaddie has also automated the process of sales report distribution. "We had paper reports floating around that could have gotten into the wrong hands."

Stanz got their investment in S4i Express back in three months with the money saved on labor, pre-printed forms, and delivery. Says Gaddie, "It eliminated many of our forms and the manpower needed to burst reports. Our customers are happier and the high quality of the documents that leave our building reflect positively on our business."



S4i Systems, Inc.
616 South El Camino Real
Suite M
San Clemente, CA 92672
949/366.5234 ph
800/231.5280 ph
949/366.5338 fax
www.s4isystems.com