

Following switch to paperless accounting boosted productivity and efficiency, company digitizes other operations, from production to sales to customer service.



Jim Proefrock, Database Administrator and DocuWare Project Lead
Jamestown Container Companies, Rochester, NY



“When customers called with questions about their invoices, we would have to go dig through a file cabinet to find that invoice. Now our customer service agents can lookup DocuWare records while still talking to customers on the phone.”



- Location:** USA
- Industry:** Service Provider
- Deployment:** On-Premises
- Department:** Finance / Sales / Production / Customer Service

"Reduced retrieval time is definitely the biggest benefit!"

Packaging solutions and services being managed digitally

With over 60 years of experience in the industry and 5 facilities in New York and Ohio, Jamestown Container designs packaging solutions for a variety of needs. The company supplies consumers with custom-design packaging, ranging from simple brown shipping boxes to creative and colorful options.

Growing number of documents makes file access and retrieval difficult and time consuming

With the company's customer base reaching about 1,900, Jamestown's accounting department had to maintain thousands of documents. Before DocuWare, the company estimated about 250 man hours was spent on manual file retrievals over the last few years. When a shipment went out, the customer would keep one paper copy as proof of delivery while Jamestown would keep the other and use it to invoice the customer. In one location, the accounting department maintained 20 to 30 file cabinets of packing slips and invoices. The cabinets were completely full and more papers were piling up on top. Storing so many physical copies was making the retrieval process slow, error-prone and sometimes unreliable. When customers called to ask questions about their invoices or shipments, the billing staff had to manually search for the invoices – this often took a long time.

DocuWare was integrated with existing email and accounting systems

To improve the process, Jamestown equipped their truck drivers with iPads that electronically captured customers' signatures. The software sent an email to the customer with digital proof of delivery, which helped reduce paper use, but Jamestown still needed a copy of that for its own records.

A document management system was needed and DocuWare was selected as the best fit. To store a digital proof of the delivery copy, Jamestown added itself as another email recipient which was made easy and seamless with DocuWare's Connect to Mail solution. This allowed Jamestown to automatically index and store the digital proof of delivery right in DocuWare. The company also integrated DocuWare with its accounting software.

Using DocuWare saved time and improved customer service

Switching to digital delivery records, streamlined the process within multiple facilities' billing departments and saved time during record retrievals. It also eliminated errors and gave staff a high confidence level in the document retrieval process. Instead of manually searching filing cabinets, users simply used their computers! Today more than half of the physical file cabinets were removed and storage areas have been remodeled into new office space.

"Our customer service people no longer have to dig through a file cabinet to find an invoice while customers stay on the phone waiting. Now they just pull up a record in DocuWare."

"We no longer have to deal with the physical documents. Currently, we have 10 digital file cabinets being used and we have approximately 600,000 digital documents stored within them."

Jamestown now uses electronic file cabinets and adds about 20,000 documents per month. "We have 10 file cabinets and within these are approximately 600,000 documents," says Proefrock. "Now, while on the phone with the customers, employees open up DocuWare in their web browser and boom - they find the relevant document. They no longer have to dig through paper. That's the biggest bang for our buck for sure."

More departments and processes go digital

After switching to paperless accounting, Jamestown used DocuWare to digitize many other processes including production documents, manufacturing specifications and vendor purchase orders. Their use of DocuWare has been expanded to customer service and some aspects of sales and production. Jamestown also uses DocuWare to manage workflows, Autoindex jobs, back end SQL data capture and full active directory integration. The ability to link documents via internal file cabinets allows easy cross-departmental collaboration while incorporating multiple processes. Document management helps the company stay competitive.



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