

OCIE® - Total Information Management

Duncan Systems uses OCIE to reduce reliance on paper and automate movement of documents

Company Background

Based in Elkhart, IN, Duncan Systems is America's leading distributor of replacement RV, truck and specialty glass. With three locations and a staff of more than 100 people, Duncan Systems has a strong commitment to growth and quality service at the lowest possible cost. Because of Duncan's customer base of RV owners, RV dealerships and manufacturers, glass and body shops, it is imperative that they provide quick response to order fulfillment and customer inquiries.

The Situation:

Like most companies, Duncan Systems created mounds of paperwork and filled up file cabinet after file cabinet with documents that needed to be retained for seven years. Duncan Systems also struggled with a labor intensive, error prone, paper-based ordering process. Orders arriving in the Incoming Order department were printed out and placed in "in-boxes" for pickup by a customer service representative. The assigned representative would complete the order taking process in the system, print multiple copies of supporting documentation and hand deliver the paperwork to purchasing. With purchasing approval, the corresponding paperwork physically moved through the shipping area and eventually arrived in the Accounting department for invoicing. Unfortunately, documents would get scattered, separated or even lost in transition; often causing significant delays in invoicing, billing errors and even an occasional lost order.

That's when Shane Duncan, President of Duncan Systems, realized their order process needed reconfiguring and began searching for a solution that not only digitizes paper documents for archive and retrieval, but a solution that also focused on automating the movement of documents through their order process. To go paperless seems like an impossible feat, but Shane Duncan knew the rewards for doing so would result in a better company, a more efficient operation and higher margins. With effective document and process management, Duncan Systems' goal was to increase operational speed throughout their organization and increase their potential for financial gain through automation.

The Solution:

To accomplish this goal, Duncan Systems selected OCIE by Donnell Systems to reduce their reliance on paper and provide employees with an end-to-end solution for order process automation. "Duncan Systems selected OCIE because it was inexpensive and offered much more than just document management," stated Mary Hertel, Customer Relations Manager for Donnell Systems. "The OCIE implementation for Duncan was extremely straightforward and allowed them to get up and running quickly with little disruption to their daily work activity," said Hertel.



Duncan Systems has received the following benefits since the implementation of OCIE:

- Eliminated invoicing delays, loss of documents, and billing errors
- Eliminated physical transfer of paperwork throughout their order process
- Improved responsiveness to customer inquiries
- Reduced paper, toner and printer expenses
- Obtained regulatory compliance without the paper load
- Improved internal control procedures
- Streamlined A/R, A/P and general accounting processing and research
- Freed up floor space and reduced file cabinet usage
- Fast return on their OCIE investment

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The OCIE solution is designed around Duncan Systems' order workflow and comprised of three main OCIE processing modules: DocVista for archiving, retrieving and viewing reports and documents, OCIE-AutoIndex for data extraction and auto-indexing of field values upon documents loaded into the OCIE system, and OCIE-WorkFlow for the movement of documents through a business process.

Instead of printing a document associated with an order, the information is immediately captured by OCIE and based on document type, automatically routed to the correct department or person identified at that point in the order process. As documents migrate through the order cycle, OCIE automatically triggers or updates field values associated with a document with critical information. This information assists users in determining the status of an order. "Not one piece of paper has been printed to handle the order. Where Duncan once produced a stack of paper to manage an event, they now only print out one document, the shipping receipt that is sent with the outgoing order," said Erika Schroeder, OCIE Training Director for Donnell Systems.

In the back office, OCIE provides Duncan's Accounting department with a complete archival of order history documentation for use in invoicing, reference and research. OCIE also provides a digital archive of all accounts payable and receivable records, general accounting records and financial reports, bank reports and lockbox images. "Employees were pleasantly surprised with the change and realize that OCIE supports more effective customer service, green business initiatives, regulatory compliance and improved job performance," said Schroeder.

The Result:

With OCIE, Duncan Systems met its goal to reduce paper usage, automate document processing and routing, and provide easier access to information throughout their organization. By transforming manual processes that are labor intensive and extremely time consuming into reliable electronic processes that require less human interaction, Duncan Systems significantly increased office productivity. Shane Duncan is not content to sit by and enjoy the current successes they've had with OCIE. He will continue to work on processes and procedures to improve customer service and save even more through their usage of the OCIE system. There are future plans being formulated to exploit more of the system's capabilities in other company divisions and departments.

Key benefits include:

- Fast return on investment
- Increase in volume of orders processed daily
- Elimination of lost documentation, invoicing delays and billing errors
- Improved responsiveness to customer inquires and better customer service
- Reduction in paper, toner and printer expenses
- Fast and easy access to accounting and financial information
- Free up floor space and reduce file cabinet usage
- Elimination of labor-intensive tasks such as filing and movement of paper

For more information contact:

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