Document Management Case Study

S4i Systems

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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.

Stanz Foodservice:
Long-term impression of S4i Express, S4i ImageXP
After six years, software from S4i continues to add value to Retalix ERP.

Back in 2003, the top man in IT at Stanz Foodservice had reached a tipping point. Pre-printed shipping documents represented an unnecessary expense for the company, and despite the high cost of having a printing company produce their four-part Invoice forms, the quality of second, third, and fourth pages that accompanied shipments were of dismal quality, since the impact printers used to complete them couldn't strike the paper with enough force.

Fast forward to 2009.

Six years have now gone by since Stanz, based in South Bend, Indiana, started using S4i Express, virtually eliminating the need for their staff to manually change the preprinted forms in the printer from invoices to shipping manifests. Because the forms stock now is blank except for terms and conditions printed on the back, S4i Express can automatically change documents by simply changing the template that gets

value. Based on all of our criteria, this project and all those subsequent to this one were 100 percent successful. S4i Express did everything they promised it would."

Stanz manages its operation with an IBM Power System server model 9406-525. Their core business applications are from Retalix, a company that specializes in developing software for the food industry. Retalix Power Enterprise is a complete end-to-end suite that provides support for Supply Chain Management, Customer Relationship Management, Operations Management and Business Management.

Retalix Redux

Early on, Gaddie knew that S4i also offered an integrated document imaging system but trained his gaze on revising the processes that involved printing business documents. In 2003, he realized that imaging was probably going to be

> ## "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*

merged with the spooled report data.

During the past six years, roughly 47,500 truckloads of merchandise have left the Stanz Foodservice 100,000 square foot warehouse facility for destinations like Notre Dame University. Stanz has steadily expanded its customer base and all of its delivery areas, and last year, a 30,000 square foot freezer set to a chilly minus 12 degrees Fahrenheit, was built to handle frozen goods.

Foodservice vendors are accustomed to working on thin margins, hence, in a business culture that revolves around pragmatism, vendors find ways to streamline most of their processes to save money. After implementing S4i Express, Stanz recouped its capital outlay in just three months with the money saved on preprinted forms, the manpower necessary to burst the reports, and delivery.

Mark Gaddie, the company's vice president of information technology recently said, "Anything we buy is going to have to work and deliver

the next step because document flow within his company was being handled inefficiently.

In 2007 Stanz implemented Retalix Power Net, a tool that boosts his company's competitive position by offering customers on-demand web-based services. Retalix Power Net is a customer Portal designed to enhance service and decrease service costs. Customers can view their account information and create orders online at their convenience. Retalix Power Net is available 24 hours a day, 7 days a week. Says Gaddie, "It connects us to our customers and enables them to interact with us without picking up a phone and talking with a sales rep."

Around the time Gaddie integrated Retalix Power Net with his enterprise applications, Stanz president, Mark Harman, began weighing the virtues of offering the company's clients on-line access to product-specific nutritional data and Material Safety Data Sheets (MSDS), information that had previously

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If Gaddie could turn back the clock to 2003 and do some things differently, what would they be? "I would escalate the timeframe and do these things more quickly"

Mark Gaddie, Vice President of Information Technology Stanz Foodservice

been extended to them in printed form. Harman knew that serving up a wide variety of documents through a secured portal could further establish an important electronic connection between Stanz and it's customers.

Gaddie's earlier thoughts of deploying S4i ImageXP--a product that captures document images electronically, and simplifies storage and retrieval--were now materializing, so he bought a scanner and arranged for members of his staff to be trained. He then had all of the nutritional sheets and MSDS documents that were being mailed to customers scanned and linked to the respective item numbers to which they pertained. When a customer keys in an item number--if he sees a line under the description-- he can click on it and Retalix Power Net will link to the electronic MSDS or nutritional data sheet replete with the Stanz logo watermark. Customers can save or print these documents at their desks. "This went a long way to foment the downstream connection with our customers and the upstream relationships that we have with Retalix and S4i. It made both applications more feature rich."

Recently, Stanz added a tab called "S4i Documents" to the Retalix Power Net Portal where Monthly Statements, Credit Memos, Proof of Delivery documents and custom reports are available to customers with the appropriate authority.

Gaddie's latest effort to improve document workflow started in March of 2008, Stanz office workers have been scanning all of the invoices that have been approved by customers upon receipt of their orders. Previously, these invoices were stored in file cabinets, and after six months

placed in boxes, stacked on a pallet, and stored in the warehouse.

Wish List

Gaddie sees many new ways to put S4i's products to work and keeps a wish list. One project that he hopes to tackle in the near future involves utilizing the Power Net Vendor Portal for vendors who sell goods to Stanz can access. "I want to scan the Purchase Order, the Receiver, the vendors Invoice, and the check we used to pay them."

Since Stanz implemented S4i Express and S4i ImageXP, the company's office suite has become less crowded and as tranquil as a tearoom. Says Gaddie, "We have no greenbar paper, or cartridges. We don't even have a greenbar printer anymore. Before S4i, we had five of them. I've been in the information management field for a while and I couldn't come to grips with the fact that we were going to get rid of all of our greenbar printers, but when I looked at the facts, we didn't need them anymore."

Gaddie is on the Retalix Advisory Board and says he interacts with its 14 members on a frequent basis. "We were the first Retalix customer using S4i Express so other members often ask me questions about it."

If Gaddie could turn back the clock to 2003 and do some things differently, what would they be? "I would escalate the timeframe and do these things more quickly" he says.

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