



**Customer:** United Solutions

**Industry:** Manufacturing

**Business Solution:** docSTAR Document Management Software

**Business Challenge:** Eliminate paper and institute an efficient workflow for processing a large volume of digital documents on a daily basis.

**Contact:** Gary Saklad, PIF Technologies, docSTAR Platinum Partner

## Plastics Manufacturer Realizes Immediate Returns with docSTAR

“We were bogged down by processing enormous amounts of paper,” explains Geary Lashua, IT Administrator at New England–based United Solutions. “We knew we really needed to clean that up, particularly in the order fulfillment process. The physical storage alone was just burying us.”

Now, just six months after bringing docSTAR online on day one of its fiscal year, the company is processing about 2,000 digital documents a day and expects to achieve a full return on investment early in the second year of operation. “Have we gotten the results we hoped to get? In a nutshell, yes,” declares Lashua.

### Organizing the Organizers

United Solutions is a leading supplier of plastic housewares and office products, including laundry baskets, wastebaskets, sink trays, food storage containers, pails, office organizers, and storage and recycling bins. They are also the number-one seller and manufacturer of blow-molded trashcans in the country, including those made under the Rubbermaid brand—the big cans a homeowner rolls down to the curb for trash pickup. Their products are sold directly to stores, including Sears, Ace Hardware, OfficeMax, Staples, and many other national and regional chains.

The company’s administrative office is in Leominster, MA, and its three manufacturing facilities are in Leominster, Sardis, MS, and Gilbert, AZ. They boast that more than 99 percent of their products are “Proudly Made in USA.”

A significant part of one of those facilities is dedicated to document storage. “We were heavy in paper processing,” recalls Lashua, “especially in order fulfillment—everything from receiving a purchase order through shipping it.”

The handling of massive amounts of paper had been an ongoing issue for United Solutions. “We did keep our eyes open,” says Lashua. “We had docSTAR’s Partner, PIF Technologies, come in and present solutions to us periodically for about five years, and each time we just felt we weren’t ready to make the investment in the system. Finally, last year, when they approached us yet again, we said, ‘Okay, come on in, we may be ready.’ It was good, persistent effort on their part—they were always patient and helpful and very professional—and it finally worked!”

The IT department acted as the internal product champions for the solution. During the sales process, IT had all department managers meet with PIF Technologies to learn about the benefits for their specific areas of responsibility: production, sales, engineering, and finance. “We were looking for the biggest bang for the buck,” continues Lashua. “What can we address with this new tool that will show people in the organization the benefits of docSTAR and give us a concrete return on the investment? That clearly turned out to be order processing.”

### An Emphasis on ROI

The PIF Technologies team worked up an ROI plan that kept the staff focused on a simple solution that would bring easily measurable savings. They looked at the office printer, printing-related consumables, paper storage, and the cost of human resources that could be better utilized elsewhere in the company. “As for printing and related materials and costs, such as file folders, toner, paper, cabinets, and retrieval time,” explains Lashua, “we came to \$1,000 a month that we should be able to recoup immediately—and that doesn’t include personnel-related

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savings. For the latter, we're able to refocus personnel efforts on other tasks for better productivity. We already see savings, even after only six months. We've actually eliminated a printer/copier entirely, and that alone was \$300 a month just for the device, not including paper and toner."

Purchase orders arrive at United Solutions in various forms, but over 90 percent arrive from the store's buyer to the company's order department digitally via Electronic Data Interchange (EDI). They are automatically converted into United Solutions sales orders and stored as virtual forms in the docSTAR system. "We used to produce a printed document," says Lashua. "Now all the fields in the order are displayed onscreen for people to retrieve and act on through all the various stages in the order processing and fulfillment." The implementation was customized by docSTAR. "My part of the implementation was to write what was essentially a print driver to format that data onscreen into a usable form for our people. Think of it as a docSTAR virtual printer—just another Windows print driver and print queue. That was all that we had to do here to get the system working for us. All the rest was handled by docSTAR during the design and implementation process."

### Implementation Is a Team Effort

Before beginning the implementation, the PIF Technologies team met with everyone involved in the order fulfillment process and found out what forms and information they needed to do their jobs. Everything had to work smoothly with their accounting software, EnterpriseIQ ERP, from IQMS. The implementation team suggested best practices in order to use the system most effectively. United Solutions uses seven to ten documents in its order process: purchase order, sales order, pick ticket, tally sheet, packing slip, bill of lading, invoice, and all correspondence with the customer pertaining to specific order. After deliberating with the team, they chose the purchase order number to use as the unique key that tied together all forms generated by an order. By entering that purchase order number, a system user can pull up all documents and correspondence associated with that order.

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*"We already know that within 18 months we will achieve a full return on our investment."*

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"The process of developing an implementation plan was quite easy for us," remembers Lashua. "I'd say that PIF managed it very confidently, capably, and effectively. They came up with the plan and schedule, and they executed it based on our needs. They did much of it in-house. There were two people here, working on and off for about two weeks. We watched over their shoulders when we could so we could learn."

### All Systems Go for Go-Live

United Solutions had PIF Technologies on an aggressive go-live schedule. "We told them beforehand that we wanted to go live on the first day of our fiscal year, November 1," Lashua continues. "We wanted to have this implemented so that all our documentation would be managed within docSTAR from day one of our fiscal year. That way we'd have a clean year, and we wouldn't have to go back to paper records and scan them into the system later on to complete the year's records. But it was aggressive trying to meet that date. That's why we wanted PIF to do the first implementation. They agreed to that, and it did indeed occur on schedule."

The new system is totally transparent to the company's retail buyers. They use their normal ordering systems, most of which are EDI-based and therefore digital. The few orders that come in on paper—fewer than 5 percent—are scanned into the system and mapped into the docSTAR virtual form.

Geary Lashua says the docSTAR launch was very successful. "The training was smooth, because the interface is extremely intuitive. Our people can just look at documents on docSTAR the same way they would have looked at them on paper. The document you see onscreen is very much analogous to what people have been working with on paper for years. The forms structures are now literally within docSTAR. It's just like going through a file cabinet and seeing the same documents you used to see on paper. You go into retrieval and do a search or go into a preset file cabinet and just look for the document you need. In our case, we look for a purchase order number, and it brings up all the documents and correspondence attached to that purchase order."

United Solutions opted to digitize only orders going forward and not go back and scan in archived records from prior years. “We wanted to start cleanly with a new fiscal year,” explains Lashua, “and that’s where we’ll start our digital records. We felt the effort of going back into old records wasn’t justified for us.”

The offsite disaster recovery feature was a key selling point for United Solutions. The IT department benefits from not having to deal with disk space or worrying about maintaining physical backup devices for duplicate or triplicate backups. They have all their data on their docSTAR server in-house, but PIF Technologies supplies the offsite backup facility and takes responsibility for all the hardware, software, and maintenance of it.

### Unexpected Benefit: Reduced Chargebacks & Increased Satisfaction

Lashua says the move to docSTAR has yielded some unexpected benefits. “In our business,” he explains, “we have to deal with chargebacks. If there’s anything wrong in a shipment, the buyer will charge you. It could be shipped on the wrong type of pallet, or the wrong kind of tape may have been used on the box, or the shipment may be short. If anything comes in that is different from the way the customer ordered it, then we are subject to chargebacks. If we want to challenge a chargeback, now we have all our records easily at hand, including emails and notes. A customer could order a certain quantity, for example, and then the buyer emails and says, ‘Why don’t you just send half now and half two weeks later—that will work out better for us.’ We can accommodate that. But if someone on their receiving dock doesn’t know about that change, they’re going to say they were shorted and charge back a fee to us. Now we have the records all pulled together to document the change, regardless of which department was involved in the communications. We can easily show we did what they asked and the chargeback isn’t warranted. It cuts down on all sorts of investigation and legwork and questions and potential frustrations. We used to have to say, ‘Okay, we’ll get back to you.’ And then we’d have to do some paper research, backtrack and see where things went wrong. Now we can just say give me five seconds and I’ll have everything related to that purchase order in front of me, and they can address the problem right then and there. And then maybe we’ll even get to fulfill that missing half of the order instead of running the risk that the buyer will say, ‘Well, let’s leave it this way, I’ll get by with only half the order.’ Now we’ve shipped all the rest and brought in the revenues we might have lost! Plus we’ve looked like we’re right on top of the issue with quick and easy access to the order and fulfillment information. Just that act of saying we’ll get back to you puts that order at risk. Maybe you can’t get them back on the phone right away. Maybe they’ll change their mind, or the boss will tell them to just stick with the amount they already received so they don’t carry more inventory. We just look so much more professional, and we can get sales and satisfaction results from that.”

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Geary Lashua has some final words of praise for PIF Technologies and docSTAR: “We’re only six months in, and we’re clearly seeing the savings. In about six months or so, we’d like to bring in WebWorks, the browser-based part of the solution. The project has gone very well. Even now, the sales person stops by from time to time to see how we’re doing and gauge our satisfaction. They’re really good with that. We already know that within 18 months we will achieve a full return on our investment. And we provide a higher level of customer service, with greater efficiency. It may even help our employee morale to have all this information at hand—misunderstandings can be dealt with much more easily and with much less finger pointing, now that everything is accessible under the purchase order number. If we had it to do all over, we’d go with docSTAR again—only I wish we had done it earlier!”

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docSTAR is a recognized leader of comprehensive and integrated document management solutions. docSTAR allows instant access to documents and immediate cost savings while delivering ease of use, fast implementation, safety, and security.