INVU:

Stoddard Manufacturing

Streamlined Sales Order Processing

Rising storage costs, increasing time wasted due to problematic document access and sporadic document loss meant that a solution was high on the agenda.

INVU:

Stoddard Manufacturing

Document Management | Capture
- Integration with SYSPRO -

Stoddard Manufacturing Ltd specialise in the manufacture of dental rotary instruments which are used throughout the world.

Introduction

Since 1934, the family firm of Stoddard Manufacturing Ltd has specialised in the manufacture of specialist dental instruments. Dental polishers and other rotary instruments are exported worldwide under the trade names of a number of major dental companies as well as Stoddard and Good Dent brands. Stoddard's unique range of innovative Medical Devices and dental rotary instruments is not only used by dentists, dental hygenists and dental laboratory technicians - chiropodists, veterinary surgeons, jewellers and even model makers favour Stoddard implements. The business prides itself on innovation and quality and is ISO9002 certified and CE accredited.

> *"Our latest sales figures have shown an improvement in turnover, which can only be attributed to the smoother automated business processes created by Invu."*
>
> Rene Madsen,
> Operations Director

Solution Summary

- Streamlined order processing

- Quicker order fulfillment

- Reduced costs

- Reduced supplier queries

- Space savings and improved working environment

- Quick and painless adoption

Proud to partner with:

The Challenge

Operations Director Rene Madsen illustrates the changes he wanted to make, *"Previously we generated invoices in three's: one copy for our records, one for the customer and one archived. All this paper created retrieval problems and it was costly to store the files. When the new factory move was approved, we had already agreed to implement new servers and new telephone systems. As part of the project, the thought of moving all the physical storage made our minds up - it was the deciding factor in making the move to an electronic document management system. It represented a change to the way we worked, but ordered a fantastic opportunity. Our old premises were cluttered and scattered so working practices were disjointed. Implementing new software would provide a central point for correspondence and accounts queries. It would enable the business and its processes to move forward."*

> *"In the end we weighed up functionality against cost. Invu provided the most functionality for our requirements and was very cost effective."*

The Approach

A smooth implementation was critical. A concrete moving date was set and all parties agreed that operations would not be impaired. All parties worked closely to establish the business needs and to ensure that new systems did not create disruption to Stoddard's processes. Configurations were planned in detail with Stoddard's staff and refined in the run up to the Invu deployment.

The Invu solution comprised three elements.

Invu Document Management repository securely retains all documents where they are immediately available. Invu Workflow automates a number of processes around documents, especially around authorisation of invoices and other documents passing through the Sales Office. Orders received are captured either electronically or by scanning – when saved into Invu Document Management an order initiates a work task and this ensures that the SYSPRO ERP system is updated.

New sales orders are automatically captured into Invu Document Management and this ensures that there is an electronic copy available which matches against the printed version issued to the customer. This simple change has a direct benefit in ensuring that order queries are handled quickly when they arise.

Invu Capture manages package requisitions for work in progress. Alongside each sales order, SYSPRO generates a picking note for fulfilment including any labelling requirements. Once the order has been processed the picking note is scanned back via Invu Capture. A unique barcode ensures matching against the appropriate sales order and automated tagging of the document as it is stored within Invu. Once again, this ensures that an identical record is always to hand whenever there is a query.

Key Benefit Areas

Reduction in Physical Storage Space

Paperwork is no longer kept in different areas of the factory. Centralising filing is a benefit in itself and enables the company to work much more effectively. There is little paperwork remaining since documents are now retained electronically and automatically within Invu Document Management's secure repository.

Administration costs have reduced, but the most visible proof of the changes wrought by Invu's implementation is the increase in working space. There's a marked improvement in the general working environment and the space released allows for extra fulfillment capabilities.

Key Benefit Areas

Business Processes Automated

Stoddard's sales office witnessed the most profound effects once the Invu solution became operational. Invu provides instant access to all documents increasing productivity, control and document security whilst simultaneously reducing the need for user intervention and subsequent errors.

"Chasing orders through the process is a thing of the past. We can now track, trace and query invoices at any stage in the lifecycle."

Dean reflects, *"Invu has made a massive difference to the sales office. New orders would generate five paper documents to be manually processed. Now there are just two electronic copies of the sales order and an invoice which is emailed to the customer. It is only occasional that we need a printed paper copy where we don't have a customer's email address. It's safe to say that we now have a slicker running department."* Stoddard has seen an improvement in order fulfilment with new orders processed, packed and shipped more quickly. Speeding up orders has increased throughput and Dean recognises the role that Invu has played: *"Month on month we have seen an increase in turnover since implementing Invu. In difficult trading conditions, we're delighted with an overall increase to date of 20% a month."*

Dean continues, *"Chasing orders through the process is a thing of the past. We can now track, trace and query invoices at any stage in the lifecycle. It's the same with orders - we can see immediately what orders have arrived and how quickly they need to be processed. We can also analyse if there are problems, where they are in the chain and deal with them. Before Invu these orders could be sitting on someone's desk waiting to be dealt with."*

Increased Control and Document Security

Staff at Stoddard feel more in control with Invu. *"Paper chasing is a fading memory,"* says Dean. Storing all documents centrally and securely means that any document is immediately retrievable.

Dean explains the benefits. *"We can look at old invoices but SYSPRO does not show the whole order process. At times it is not very clear what the customer actually received. Previously, if we had a query we needed to retrieve the original paperwork. If anything had changed between the order and fulfillment then SYSPRO wouldn't show it – historical records and amendments aren't reflected. An adjustment or a combined order wouldn't necessarily marry up with the final shipment. With Invu, a search on a sales order will give us access to all the relevant records where we can see the whole process from sales order through to picking note and fulfillment."*

Ease of Adoption

Stoddard took full training for all staff including detailed administration training for all elements of the solution. This meant that the business could develop further configurations and workflows in line with changing processes as and when required.

"The adoption of the software was very easy. Perhaps at the start the staff were a little sceptical but once they could see the impact of the process changes to the way they work and the improvements in turnover, they were won over and now sing its praises."