



SHUMATE MECHANICAL CONNECTS EMPLOYEES ON- AND OFF-SITE TO CRUCIAL DATA WITH DOCLINK

SERVICE PROVIDER ALLOWS GREATER FLEXIBILITY FOR TECHNICIANS AND INCREASES CUSTOMER SERVICE SATISFACTION



COMPANY

Shumate Mechanical

INDUSTRY

HVAC and Mechanical Contractor

ERP SOFTWARE

KEY2ACT

WEBSITE

www.shumatemechanical.com

BACKGROUND

Shumate Mechanical provides a full range of HVAC products and services to residential, commercial, and industrial businesses in Atlanta and throughout Georgia. With 500 employees including 100+ service technicians, Shumate offers installation, replacement, engineering, design build, new construction, and maintenance services.

CHALLENGE

In 2004, Shumate became independent from Lennox Industries and had 12 months to extract itself from Lennox's infrastructure. Shumate decided to implement the KEY2ACT Job Cost and Service Management Series. As a growing company with multiple locations, they also wanted to find a solution to enhance internal communication and visibility to documents between locations and remote/offsite employees. Additionally, customer service representatives were spending a significant amount of time researching and filing documents to handle customer service calls. AP clerks were not able to see where an invoice was in the approval process and oftentimes had to wait additional days for invoices to be sent and received via interoffice mail. The physical movement of documents between departments and locations was beginning to become a bottleneck which affected their ability to bill and realize revenues in a timely manner.

“THE IMPROVED PRODUCTIVITY OF DOCLINK HAS CREATED A MORE EFFICIENT BUSINESS ENVIRONMENT WHICH TRANSLATES TO A BETTER CUSTOMER EXPERIENCE.”

- EVE HARRELL, COMMERCIAL OPERATIONS MANAGER



THE DOCLINK SOLUTION

While reviewing KEY2ACT, Shumate was introduced to DocLink and its tight integration which allows users to access and process electronic documents seamlessly from their KEY2ACT screens. They chose to adopt the paperless environment.

Hard copy documents coming from vendors and other external sources are immediately scanned into DocLink using Fujitsu desktop scanners so that electronic versions can be processed. Fujitsu scanners were chosen based on their reputation for durability and ability to produce a quality image. Vendor invoices are routed electronically to department and project managers for approval, mitigating the possibility of lost or misfiled documents and speeding up the overall transaction processing time.

Environmental responsibility and the movement to “going green” was also another important initiative for Shumate. The implementation of DocLink leads the company towards a paperless environment for future growth.

BENEFITS FOR SHUMATE

The visibility obtained with DocLink to the status and locations of documents has increased efficiency and productivity. Additionally, customer service representatives can now review the appropriate document whether it’s a waiver, invoice, or check list and email it directly to the customer while they have the customer on the phone. This allows for immediate resolution of customer service inquiries on the first phone call.

“The integration of the mobile workforce solution and DocLink has yielded tremendous benefits,” stated Frank Steinocher, Chief Information Officer. Instead of waiting for paper invoices to be generated which can sometimes cause a week-long delay, the customer is immediately emailed their invoice by the service technician. At the same time, that electronic invoice is captured into the DocLink repository. Now anyone with proper privileges can access the electronic document through DocLink or, because of the integration, through the KEY2ACT screens.” Shumate has also been able to free up 500+ft² of valuable floor space which was previously used for filing.

Connecting data for thousands of companies globally through integrated document management and workflow solution DocLink, we enable configurable, business-critical document capture, archiving, workflow and routing for any process, anywhere.

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