



HERMAN GOLDNER AUTOMATES INVOICE PROCESSING, IMPROVES PRODUCTIVITY BY 20% WITH DOCLINK

75-80% OF THE 80,000 INCOMING INVOICES PER YEAR ARE ROUTED AUTOMATICALLY TO APPROVERS VIA DOCLINK'S OCR CAPABILITIES



COMPANY

Herman Goldner Co., Inc.

INDUSTRY

Construction

ERP SOFTWARE

Key2Act

WEBSITE

www.goldner.com

BACKGROUND

Herman J. Goldner started his business in 1887 in his basement, delivering supplies using a wheelbarrow and horse drawn cart. His principles of courtesy, integrity and service became a recognized trademark that remains as a company heritage. Today, the Herman Goldner Company (HGC) is a full service mechanical and solutions provider, serving customers in the Philadelphia, New Jersey, and Northern Delaware areas.

CHALLENGE

HGC implemented a basic file server digital archiving system offered through their printer/scanner vendor, so all invoice-related documents were already stored electronically. However, the system provided no digital workflow capabilities, minimal search and retrieval options, and zero integration with their ERP solution.

Tony Le, Systems Administrator for HGC explains, "We needed a more efficient way to locate documents that were in-process. We had a great system for capturing paid invoices, but to find a problem invoice was time-consuming. Our workflow was still the traditional push paper desk-to-desk and things get lost, they get swept under a pile of other work – so tracking and accountability was an issue. We knew we would need a more robust solution eventually and always had our eyes on DocLink for this."

**“DOCLINK HAS ALLOWED US TO WORK SMARTER,
NOT HARDER. IT’S BEEN A BIG WIN FOR US.”**

- TONY LE, SYSTEMS ADMINISTRATOR



THE DOCLINK SOLUTION

With DocLink, HCG has automated a significant number of processes, including the basic function of sorting invoices. Le commented, “Vendors would mail us documents, then a mailroom clerk would open, sort, route, stamp and forward. Now vendors use email, documents are received in Outlook, DocLink OCR interprets, indexes key fields, and automatically routes it to a workflow for approval. So we’ve taken that whole element of hands-on mailroom processing and automated it as electronic data right way, initiated by the vendor. It’s been a vast improvement for us.”

HCG has also seen significant benefits from using DocLink for information access and retrieval. “All users have all documents at their fingertips,” said Le. “Everyone from project managers to accounting can now retrieve these documents, making everyone’s jobs so much easier.”

Additionally, the company uses DocLink to ensure that any correspondence, such as disputes or conflict resolution, is noted directly in the document. Le commented, “Now anyone who views that document knows the whole story, as opposed to using email for tracking/forwarding. We’ve definitely streamlined processes and improved productivity by 20%.”



BENEFITS FOR HERMAN GOLDNER

DocLink has transformed HCG’s accounting, actually changing processes. “With DocLink most documents can go from vendor to approver without a touch, without a human key click. We process 50,000-80,000 documents a year, and we’ve seen increased accuracy and significant time savings.”

HCG has also seen a tremendous improvement in collections. “With paper filing we never indexed our AR invoices, they were always in our paper filing system. So collections calls required us to round up/bundle all the invoice documentation... backup, quotes, we’d even have to try and get files stored on individuals’ computers...to send to customers. It was a very passive process. Now with ERM capture and workflow, correspondence is stored in DocLink digitally. DocLink has allowed us to work smarter, not harder. Collections have improved which is a huge value.”

Next for HCG is DocLink mobile integration to allow field service technicians and project managers to be more effective. “Le said, “Getting documents out to the field and back again quickly will allow everyone to be more effective. And travelers won’t slow approval processes anymore with documents at their fingertips, wherever they are.”

DocLink helps companies connect their people, processes and data, providing them with the ability to store, search, retrieve and send any document securely. Eliminating the need for paper, DocLink automates processes that improve organizational efficiency and reduces costs associated with human errors.

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