Laserfiche ECM Blogs

Brown Metals Company

Written by Laserfiche Staff

Brown Metals Company boasts the largest inventory of thin-gauge stainless steel coil on the West Coast. Thanks to an efficient supply chain and a highly-skilled workforce, Brown Metals can quickly process and ship orders of any size, from those weighing less than a pound to those that exceed ten tons. But as the company grew, keeping track of order-related paperwork became increasingly challenging—and had an adverse impact on employee productivity.

When an order shipped, the accompanying paperwork first went to the company's accounting and quality assurance departments for review. It then went to the file room. When a customer called with an order-related question, staff had to leave their desks and visit each of these locations in turn to search for the relevant document, while the customer waited on the phone. If the document was sitting on someone's desk or had been misfiled, staff would have to undertake a more exhaustive search and return the customer's call once they'd found the necessary information.

Recognizing that staff needed instant access to order-related documentation from their desktops, Brown's CIO, Justin Lasley, began researching digital document management. Although Lasley and his colleagues quickly saw the benefits of scanning order-related paperwork, they had doubts about the manual data entry processes most systems relied on. "Our biggest concern was how to accurately associate metadata—such an invoice number and purchase order number—with each scanned image," Lasley explains. "Most document management systems require manual entry of those values. This increases costs and does not necessarily guarantee a high level of accuracy."

Laserfiche® quickly put these doubts to rest. When staff scan order-related paperwork into the Laserfiche repository, the Quick Fields™ module reads a bar code printed on each document. Quick Fields then uses this information to automatically populate the document's template fields with the relevant metadata, which is retrieved from the company's orders database. Thanks to this process, customer service staff can now quickly locate a document using any piece of information they have, including customer name, invoice number, sales order number, purchase order number, part number or ship date—without leaving their desks. "Now, our orders are easy to locate and retrieve, and important information can be relayed to customers more quickly,"

Lasley says. "We've built our business on our ability to quickly respond to customer inquiries. Laserfiche helps us maintain that edge over our competitors."

The ability to quickly locate orders also helps production personnel. "When we receive a repeat order, we refer to previous orders to review the processing instructions," Lasley explains. "Because our production team can quickly find the original order in Laserfiche, they can provide instructions to the machine operators and shipping personnel without first having to look through a file cabinet. This helps us process orders quickly and accurately, and allows us to furnish a consistent product to customers."

Laserfiche benefits staff and customers in other ways as well. For example, staff can quickly e-mail bills of lading, invoices and other documents to customers directly from the Laserfiche repository. Optical media publishing enables staff to easily transfer both individual documents and entire directories to disc, which greatly improves document portability and enhances business continuity planning. And, whereas the file room could only hold five years' worth of orders, the Laserfiche repository has an unlimited storage capacity, meaning that Brown Metals can now build a comprehensive digital archive of all order-related documentation and correspondence.

Although Lasley originally intended to use Laserfiche only for order-related documents, he soon realized that the system would help him solve other information management challenges as well. He started with customer specifications. "We have a number of customers who are ISO 9001-registered, and who have their own manufacturing specifications they ask us to adhere to," he explains. "We receive these specifications in a variety of formats, including Microsoft® Word® documents, PDF files, faxes and e-mails. Our own ISO 9001 procedures require us to retain these documents, have them available for reference and distinguish between current and older versions. The manual system we were using to manage this information was not very convenient for our sales staff. Looking up customer requirements became daunting."

Now, Brown stores all customer specification information in Laserfiche. When staff need to reference a specification, they simply log in to the repository and navigate to the customer's folder. As customers submit updated specifications, staff use a custom template field to flag existing specifications as obsolete. Thanks to this flag, Brown can easily retain obsolete specifications for historical purposes, without causing confusion as to which set of specifications is current.

Lasley currently has plans to use Laserfiche to manage accounts payable documents, as well as the Word, Excel®, and Visio® files associated with the company's own ISO

9001 registration. He'd also like to install the Laserfiche Workflow™ module to automate the document routing process. He feels Workflow will prove particularly useful in replacing the manual process that the shop traveler currently follows to collect information about an order—including weights, coil sizes and box dimensions—as it moves through the production process.

No matter how much he expands the system's use, Lasley knows there's one thing he won't have to worry about: staff buy-in. "When we started our initial implementation, several users were not convinced that Laserfiche would bring value to our business," he says. "We'd been using a manual filing system for years, and new systems can cause feelings of uncertainty.

"After they started using the software, however, these users saw its value," he continues. "Customer service staff can quickly locate tracking numbers and other information for customers. Production personnel can easily retrieve order-processing instructions, which speeds the order fulfillment process and promotes greater accuracy. And everyone spends less time worrying about lost documents."

Lasley recommends Laserfiche to other organizations that want to streamline business processes and build stronger long-term relationships with customers. "Laserfiche has definitely helped us increase employee productivity, provide better customer service and distinguish ourselves from the competition," he says.

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