



SHUMATE MECHANICAL

BREAKING FREE OF THE TIES THAT BIND WITH *doc-link*™

COMPANY

Shumate Mechanical

BUSINESS

HVAC and Mechanical Contractor

NUMBER OF LOCATIONS

3

FINANCIAL SOFTWARE

Microsoft Dynamics GP®
WennSoft®

SCANNING HARDWARE

fi-4120C
fi-5110C
fi-5120C
fi-6140



THE RELIABILITY AND
DEPENDABILITY OF OUR
FUJITSU SCANNERS
COMBINED WITH THE
IMPROVED PRODUCTIVITY
OF *doc-link* HAS CREATED
A MORE EFFICIENT
BUSINESS ENVIRONMENT
WHICH TRANSLATES TO A
BETTER CUSTOMER
EXPERIENCE



Eve Harrell
Commercial Operations Manager
Shumate Mechanical

Company 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 over 100 service technicians, Shumate offers installation, replacement, engineering, design build, new construction and maintenance services.

Challenge:

In 2004, Shumate became independent from parent company Lennox Industries. The new standalone entity had 12 months to extract itself from Lennox's infrastructure and needed to find a new software solution. After attending the 2005 WennSoft Users Group, Shumate decided to implement the WennSoft Job Cost and Service Management Series along with Microsoft Dynamics GP.

As a growing company with multiple locations, they also wanted to find a solution to enhance their communication throughout the company and gain visibility to all the documents that were moving between the different locations and employees working from home and off-site.

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.

Solution:

While reviewing the WennSoft solution, Shumate was introduced to *doc-link*, an integrated document management and workflow solution by Altec. Key to the selection of *doc-link* was its integration with WennSoft and Dynamics GP, which allows users to access and process electronic documents seamlessly from their WennSoft or Dynamics screens.

Now, Shumate's corporate culture has adopted the paperless environment. Hard copy documents coming from vendors and other external sources are immediately scanned into *doc-link* 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. The visibility obtained with *doc-link* 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 *doc-link* has yielded tremendous benefits," stated Frank Steinocher, Chief Information Officer of Shumate. 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 *doc-link* repository. Now anyone with proper privileges can access the electronic document through *doc-link* or, because of *doc-link*'s integration, through the WennSoft of Dynamics GP screens."

Environmental responsibility and the movement to "going green" was also another important initiative for Shumate. Aside the from the efficiency and visibility of processing documents electronically, Shumate has been able to free up over 500 square feet of valuable floor space which was previously used for filing purposes.

The next step is moving the archiving of job files towards a paperless environment which will allow Shumate to benefit from immediate accessibility and additional floor space for future growth. ▲

Altec
23422 Mill Creek Drive, Suite 225
Laguna Hills, CA 92653
800.997.9921 • www.altec-inc.com
doclinksales@altec-inc.com

