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ArcFlow Ensures Process Efficiency at Copyrex

Using the document management system (DMS) ArcFlow, Copyrex, the Swiss specialist for office solutions, can centrally file all its business-relevant documents in digital form. This allows ArcFlow's sales partner to benefit from quick access to important documents and efficient operating processes.

Copyrex markets office solutions, such as printers, fax devices and shredders, for various manufacturers and provides service and support for its customers. Copyrex's service staff record all the repair or maintenance work they carry out on a so-called job sheet. As soon as the service technician has handed the job sheet in to the accounting department the invoice is generated. "In the past, service team staff often forgot to hand in the sheets directly after completing the job", explains Daniel Knecht, responsible for IT at Copyrex. "Accounts often did not notice that jobs were still open until a certain time had lapsed. This meant that invoices were often created late." Until now, all the customer or order information was filed manually by the Copyrex staff. Searching for specific documents was, as a result, often very time-consuming, particularly in cases where the job sheets had not been filed correctly. Copyrex, therefore, decided to implement a document management system (DMS) for a more efficient process design. "We decided on ArcFlow because it is a complete system which integrates all the important DMS components at very good value for money", Daniel Knecht went on to explain. And because we don't just want to use ArcFlow ourselves, but also want to sell it on to our customers, the fact that the solution is not industry-specific played an important role in our decision-making process."

"ArcFlow is an extremely competent partner. We can exchange our ideas and discuss product innovations with the manufacturer anytime. This is particularly important to us when working in a partnership"

Daniel Knecht, responsible for IT at Copyrex

Efficient Processes using Workflows

Using the document management system (DMS) ArcFlow and its workflow functionality means that Copyrex can now implement the whole process, starting with the customer order right through to invoicing, both rapidly and efficiently. To achieve this, ArcFlow compiles a list of all the individual process steps, including the deadline and the name of the person responsible. The current status can be viewed in ArcFlow by any of the employees involved in the process at any time. They can see which tasks have already been completed and which ones are next on the list. First of all, the job sheet is generated digitally and then printed out. Simultaneously, ArcFlow automatically files a PDF copy of the sheet in the corresponding digital customer folder, labeling it as an "open job sheet". The service team member takes the printed document with him/her to the customer and notes, as in the past, which services were provided. He/she then hands the sheet in at the Copyrex Reception. The Reception employee scans the document whereupon ArcFlow automatically files the digital file in the corresponding cus-





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tomer folder. This allows personnel in both the service and accounting departments to access the information simultaneously.

ArcFlow replaces the job sheet already on file with the new one, noting that it “requires invoice generation.” By way of a barcode on the document, the DMS recognizes which job sheet belongs to which customer. Should the service technician forget to hand in the sheet the accounting department is automatically notified that although the job has been completed no invoice has yet been generated. In addition, the service technician receives an e-mail stating that the accounting department has not yet received the sheet. As soon as the card arrives the accounting staff see at a glance that the invoice can be created. When the invoice is printed ArcFlow automatically files a PDF copy of the document in the respective customer folder.

Copyrex deploys the Success ERP system which is seamlessly integrated into ArcFlow. All the documents created in the ERP system are automatically captured by ArcFlow. All documents on a particular customer, such as contracts, invoices and delivery notes, can be viewed in the digital customer folder in the DMS. On top of this, the company manages all its leasing equipment using ArcFlow. Each leasing device has its own digital folder where all the documents belonging to the respective device are filed. At the same time, these documents are linked to the customer folders allowing an employee to recognize at a glance which device is currently being leased by a specific customer.

At the moment Copyrex is documenting a workflow for incoming supplier invoices. In future, the invoices will automatically be allocated to the correct folders. Furthermore, ArcFlow will remind those employees responsible of any upcoming payment deadlines. “ArcFlow is an extremely competent partner”, stated Mr. Knecht. “We can exchange our ideas and discuss product innovations with the manufacturer anytime. This is particularly important to us when working in a partnership”.

About Copyrex AG
Copyrex AG was established in 1992 and is located in Dättwil/Switzerland. Since its foundation the multi-vendor specialist has been dealing in products for office and production solutions, ranging from workstation devices to high capacity systems achieving an output of up to 500 000 pages per month, whereby the main focus is on support, service and training services.





