

Customer Story:

## Mechanical Firm Frees Up Floor Space with fi Series Scanners



### Business Needs

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.

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. Shumate decided to implement the WennSoft Job Cost and Service Management Series along with Microsoft Dynamics™ GP.

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## Shumate Mechanical

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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 often times 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 solutions, Shumate was introduced to Doclink™, an integrated document management and workflow solution by Altec. Key to the selection of Doclink was its integration with WennSoft and Dynamics GP, which allowed users to access and process electronic documents seamlessly from their WennSoft or Dynamics screens. Now, Shumate's corporate culture adopted a paperless environment. Hard copy documents coming from vendors and other external sources were immediately scanned into Doclink using fi Series desktop scanners so that electronic versions could be processed. Shumate selected a mix of fi Series document scanners, for their ease of use, fast speeds, and flexibility.

"The fi Series document scanners were chosen based on their reputation for durability and ability to produce a quality image. The scanners have no doubt increased efficiency and improved business processes; the cost savings we've incurred continues to validate our decision."

Vendor invoices were 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 Doclink to the status and locations of documents increased efficiency and productivity. Additionally, customer service representatives could now review the appropriate document, whether it's a waiver, invoice or checklist, and email it directly to the customer while they had them on the phone. This allowed for immediate resolution of customer service inquiries on the first phone call.



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**"The integration of the mobile workforce solution, Doclink, and Ricoh scanners yielded tremendous benefits. 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 Doclink's integration, through the WennSoft of Dynamics GP screens."**

— Frank Steinocher, Chief Information Officer,  
Shumate Mechanical

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### Benefits

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

“The reliability and dependability of our fi Series document scanners combined with the improved productivity of Doclink have created a more efficient business environment which translates to a better customer experience,” shared Eve Harrell, Commercial Operations Manager, Shumate Mechanical. The next step was moving the archiving of job files towards a paperless environment which allowed Shumate to benefit from immediate accessibility and additional floor space for future growth.

### Recommended Products:



**fi-8170**

The next generation in scanning excellence.



**fi-8270**

Versatile scanning with both flatbed and ADF.

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