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– Lee Lewis  
SUMMIT Electric Supply

C A S E S T U D Y

**COVUS**<sup>®</sup>

A FORMSCAPE<sup>®</sup> SOLUTION

## Challenge

- > Continually improve customer service
- > Improve business process efficiency to support company growth

## Solution

**Covus<sup>®</sup> will allow SUMMIT to:**

- > Automatically image and load ship/charge documents for customer self-service retrieval
- > Automatically image and load vendor invoices and route checks for faster vendor payment processing
- > Generate customized, professional-looking customer-facing documents

## Results

- > Reduced lookup time for ship/charge documents by 100 hours a month
- > Will achieve fast payment discounts from suppliers through faster invoice and check processing
- > Will reduce document retrieval, postage, and other costs by \$80K per year
- > Improved customer service by addressing customers' labeling requests, customizing communications, and providing self-service access to documents
- > Enhanced branding
- > Customized marketing



## INDUSTRY

Distribution

## COMPANY

SUMMIT Electric Supply is one of the most innovative and service-oriented electrical distributors in the country, carrying a full range of electrical material including distribution equipment, motor control, lamps & lighting, wiring devices, conduit & fittings, wire & cable, tools, automation, datacom and more. SUMMIT has 20 Service Centers in New Mexico, Texas, Louisiana and Arizona

## NUMBER OF PAGES

Output: 10,000-12,000 pages per day  
Input: 3,000-5,000 pages per day

## FORMSCAPE PRODUCTS

Covus

## ERP SOLUTION

Legacy system

# Covus helps SUMMIT Electric Supply Improve Customer Service and Streamline Financial Processes

SUMMIT Electric Supply is one of the fastest growing electrical distributors in the country. A key driver of this growth has been the company's philosophy of service excellence. SUMMIT believes in listening to its customers to discover their real needs and meeting those needs with quality products, timely, accurate and efficient service and bottom line savings. SUMMIT has long used FormScape products, continually evolving its implementation as part of its ongoing effort to improve customer service.

With its upgrade to Covus, SUMMIT is continuing along this path by providing customers with instant self-service access to imaged proof-of-delivery documents – and ultimately to a wide range of customer documents, including customer credit applications and bank statements. Covus will also enable SUMMIT to streamline financial processes and achieve fast payment discounts.

## THE COVUS SOLUTION

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SUMMIT has 20 locations in Arizona, Texas, Louisiana, and New Mexico. Today, FormScape Servers in each location locally print a wide range of documents including packing slips, purchase orders, and quotations while a central FormScape server creates documents and manages distributed FormScape servers. SUMMIT has completed a pilot Covus application, which it will roll out to all 20 locations in October of 2004.

## ONGOING ENHANCEMENTS IMPROVE BRANDING AND CUSTOMER SERVICE

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SUMMIT first began using FormScape in 1997. At first, the company used the solution simply to generate checks. SUMMIT soon realized that FormScape could make its quotes look more professional, so it began using the solution for these documents as well. Before long, SUMMIT had overhauled its corporate image and was producing all customer facing documents using FormScape.

At this point, in addition to enhancing its branding efforts, FormScape reduced costs by allowing SUMMIT to replace its line printers – which jammed frequently and required expensive pre-printed forms – with low cost, plain-paper laser printers.

But these benefits were just the beginning. Soon SUMMIT was using FormScape to improve customer service by meeting customer demands to receive quotations, purchase orders, invoices, and statements via email and fax.

## PERSONALIZED MARKETING AND CUSTOMER COMMUNICATIONS

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SUMMIT also began using FormScape to create dynamic, custom marketing and customer communications. Says Lee Lewis, IT manager for SUMMIT, "As one example, our marketing department announces specific events on the Web. FormScape can automatically include these announcements on customer invoices and statements. We've also been able to include personalized customer contacts for each office on customer documents, rather than putting a central call center number on a pre-printed form, to provide targeted service."

Because FormScape makes it easy to adjust forms, SUMMIT has also been able to quickly address customer labeling requests and requirements and has thereby enabled SUMMIT to capture additional business. Says Lewis, "With our previous, pre-printed forms, we'd be locked into a specific design. If a customer had a special request, we would have to turn away the business. FormScape allows us to respond to customer demands. For example, customers wanted us to change our forms to make our products easier to receive. We used FormScape to include a barcode with a purchase order number on the pick/pack slip so customers can receive items faster."

Lewis adds, "We've even used FormScape to tailor packing labels to individual accounts. For example, one of our customers is a nuclear power plant. Each package for this customer must have a label identifying what's inside. FormScape generates the relevant label automatically."

## MIGRATING TO COVUS

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In keeping with its ongoing adoption of new FormScape functionality, SUMMIT recently completed a pilot project with Covus and is in the process of deploying Covus throughout the company. With the initial project, SUMMIT used Covus to image ship/charge slips that customers have signed as proof of delivery. If a customer has a question about a delivery, Covus gives the customer self-service access to the proof-of-delivery documents. Covus also gives internal users access to all documents produced with FormScape.

Says Lewis, "The new Covus system is helping us improve customer service by providing customers with instant, self-service access to proof-of-delivery documents. At the same time, it helps us improve productivity. Before implementing Covus, we spent an average of 100 hours per month simply responding to proof-of-delivery requests. Covus will eliminate that task. It also makes it easier and faster for employees to access documents as well."

Ultimately, SUMMIT plans to provide customers with self-service access to all of their SUMMIT documents, including proof-of-delivery, statements, invoices, open order reports, shipping performance reports, and more. Explains Lewis, "This will allow us to give our customers more feedback on the value we're adding to their business and make it easier for them to do business with us."

# Covus helps SUMMIT Electric Supply Improve Customer Service and Streamline Financial Processes

## COVUS TO STREAMLINE FINANCIAL PROCESSES

Not surprisingly, SUMMIT already has plans for subsequent Covus implementations on the drawing board. Since it began using FormScape, SUMMIT has more than doubled in size. To improve efficiency of its financial operations, the company consolidated payables and receivables processing into a central office. Yet, branch offices – and even customers – need visibility into various financial documents to verify information. As a result, the company was spending a great deal of time and expense filing and retrieving documents and sending documents back and forth via overnight mail and fax.

To streamline its internal operations, SUMMIT plans to use Covus to image vendor invoices then automatically lift the data and load it into its business applications. "We have 500 regular vendors and 1,000s of temporary vendors. Our accounting personnel are overloaded. Covus will enable us to lift data from each invoice, including the amount of the invoice, the date, vendor code and automatically insert those values into our financial systems. It will also store the imaged invoice. People will then be able to search for and pull up invoices online."

SUMMIT then plans to use Covus to create automated vendor check approval processes to pay these invoices. Checks over a certain dollar amount must be approved and signed. Currently, if there's a question about an invoice, the approver must manually pull the invoice. With Covus, SUMMIT will automatically route checks for approval, and also allow approvers them to look up the original invoice online if questions arise.

Says Lewis, "A lot of discounts are based on how quickly we can pay our vendors. In the past, the volume of payments slowed the approval process. Covus will help us get vendor checks approved as quickly as possible."

Over all, conservative ROI estimates show an overall cost savings of roughly \$80,000 per year. But perhaps even more important, says Lewis, "Covus will revolutionize our business by getting us out of the paper warehousing business."



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## ABOUT FORMSCAPE

FormScape is dedicated to helping companies target operational inefficiencies and communication barriers through Document Process Automation solutions. By uniquely integrating documents, processes and business systems, FormScape enterprise software solutions deliver faster action through real-time information. FormScape is the single-source for expertise spanning pre-packaged processes and ERP interface integration with document imaging, storage and output. Companies of all sizes use FormScape solutions to cut costs, improve working capital management and profitability, advance customer-supplier service, and ensure better control.

With more than 7000 customers, 50 partners, and offices across the globe, FormScape delivers in banking, finance, insurance, distribution, manufacturing, and healthcare industries. The company's clients include BP, CitiGroup, Blockbuster, DaimlerChrysler, Johnson & Johnson, Ingram Micro, Medtronic, Deutsche Bank, Wal-Mart, La-Z-Boy, Wells Fargo, Phillips, and Fujitsu.

Workers are more  
*productive*

Suppliers are more  
*responsive*

Customers are more  
*satisfied*

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