

Caltronic Business Systems Improves Document Workflow with GlobalSearch®

Celebrating its 40th anniversary, Caltronic Business Systems is one of the nation's largest independent copier dealers, providing cutting edge technology and award winning service in the document management and software solutions industry. Caltronic offers a wide array of office products including high speed digital copiers and printers, fax and multifunctional devices, scanning solutions and content management software. A family owned and operated company, Caltronic has ten offices in the Western United States serving California locally and businesses nationwide.

As a longtime leader of the office equipment industry, Caltronic has progressed alongside developments in technology to adapt with the industry's solutions evolution. Yesterday's copy machines have become today's digital, multifunctional business hubs that are networked to computers and impact every segment of a company's processes. Documents drive business today, and the Caltronic Solutions Team offers services and products for every facet of business. From a basic desktop scanner, to full Enterprise Document Management, Caltronic can help any business move towards a paperless environment, including their own.

"We process sales orders every day, all day long, from each of our branch offices," said Chris McDonald, Solutions Specialist at Caltronic Business Systems. "Our sales representatives are constantly in need of sales order copies and service documentation. Getting this paperwork to our sales team and our service technicians was inefficient, taking hours, if not days at times."

Recognizing the inefficiencies of their own paper-based processes, Caltronic implemented Square 9's GlobalSearch Document Management suite to streamline workflow and improve documentation accessibility. "GlobalSearch with GlobalForms, Square 9's digital e-forms creator, has allowed our staff to get critical information to both Sales and Service teams within minutes, instead of hours,"

McDonald continued. "GlobalSearch has rapidly reduced our response time in customer service because now each department can immediately access sales records and service calls."



Increased Customer Satisfaction

Snapshot

Industry:

Business Solutions & Copier Dealer

Departments Impacted:

Sales, Customer Service and Technicians

Featured Products:

GlobalSearch, GlobalForms and GlobalAction

Objectives:

Create dynamic web-based forms and define a streamlined workflow in order to make sales orders and service call documentation easily accessible across all departments and to reduce customer service response times

Having this solution deployed allows our staff to be able to serve 30% more customers by not having to physically fill out and submit paper files."

With GlobalForms, Caltronic's specific need of eliminating field paperwork was also resolved, as McDonald explained. "Both solutions have radically changed the level of service provided by our field supervisors to our customers and internal employees. GlobalForms allows for instant feedback from clients to the employee via GlobalAction document workflows, eliminating several meetings a week and allowing more time to serve our customers. By creating a digital process, we've eliminated lost documents and the need to revisit an account to manually re-submit paperwork."

Caltronic's consultative approach allows solutions specialists to understand a client's business needs, before applying the appropriate solution to streamline and improve document-intensive processes. "GlobalForms has been a great addition as so many customers are needing web-based forms for data processing. With GlobalForms, usually our clients will see an ROI in 12-18 months, depending on the size of the implementation."

ROI in 12-18 Months 

One of the many results Caltronic internally has obtained from implementing GlobalSearch is

advanced visibility into daily processes. "We now have the ability to give management a window into the daily activity of employees, with instant access to reports and issues that can be addressed without the need of field personnel coming into the office," said McDonald. Other results include the elimination of filing cabinets which in return have allowed for open storage space to be used for repurposed employee work, increasing production.



**1.5 Million
Files
Stored**

With over 150 GB of files stored within GlobalSearch, Caltronics employees have immediate access to about 1.5 million documents from their individual workstations. "We've also noticed that the GlobalSearch solution has improved overall employee job satisfaction by eliminating the tedious task of filing and allowing the user to focus on more important tasks," McDonald noted. "The retrieval of documents has come down from hours or days to minutes. The efficiency is so great that it almost can't be categorized."

With the award winning GlobalSearch solution in place, storing, filing and transporting documents is no longer expensive or time consuming. "GlobalSearch is playing such a pivotal role in our organization it is difficult to put a number on it. It has improved every department in many ways," McDonald concluded. "Many of our departments have continued to adopt new methods of using the software that continues to boost their productivity. I see no stopping point of the productivity gain as the software gets used in new ways around the organization. We have been very happy with both the support of Square 9 and also the continued development of the GlobalSearch product line. It has truly allowed us to continue to grow and add additional sales representatives to support our installations and customer base."

Twelve-time winner of the Konica Minolta Pro-Tech Service Award, Caltronics Business Systems exceeds industry standards in equipment and customer service. "Our team customizes GlobalSearch to each organization's specific needs from workflow and Accounts Payable processing to Human Resources and customized employee onboarding approvals," said McDonald. The Pro-Tech Service symbol of quality gives customers the confidence that they will receive professional, reliable service and top-notch performance in their dealings with Caltronics Business

Systems. "We have been delivering the GlobalSearch product suite to clients for over two years and it has become our go to product out of our nine other offerings. We are always recommending GlobalSearch! The ease of use and having such advanced capture and workflow capabilities all from one product is outstanding."

From capture to output, collection to distribution, Caltronics can provide the expertise to take any business to the next level, providing improved efficiency and productivity through intelligent technology. To learn more about Caltronics Business System, visit www.caltronics.net or talk to a solutions specialists today by calling 800-775-9545.