Document Capture Solutions Enable Realtor Association to Close the Door to Inefficient Paper Processes!

Supporting Central Texas real estate professionals since 1926, Austin Board of Realtors (ABoR) provides unparalleled member benefits that speak to every aspect of the real estate business. Through product support, educational training, and access to the Multiple Listing Service, ABoR provides a foundation to strengthen careers and improve lives.

ABoR is known for the tools it provides in helping realtors grow and succeed. But after nine decades of serving the real estate community, storage issues had become a significant challenge. As a "green" company dedicated to reducing paper waste, ABoR was determined to restructure their paperless initiative with a solution that would free up office space while improving the search and retrieval of archived records.

Delivering the ability to digitally store, search and design document workflows with powerful forms automation, GlobalSearch® Enterprise Content Management (ECM) software from Square 9 proved to be the right fit for ABoR's needs. Although leveraged across multiple areas of business, ABoR's Member Services department uses GlobalSearch ECM daily to import member forms. By digitizing the management of form data, the department is saving 5-10 hours per month on administrative tasks.

But what's significantly improved business processes for ABoR is Square 9's GlobalCapture® Document Capture Automation solution, integrated with their Sharp OSA enabled multi-functional printer (MFP). With over 15 automated capture workflows, each accessible directly from the MFP touch panel, ABoR staff members can easily scan, index and store a document to the ECM database in a matter of seconds.

Snapshot

Industry:
Realtor Association

Departments Impacted:
Member Services, Contracts Management, IT, Events, Finance, Human Resources, Education

Featured Products:
GlobalSearch, GlobalCapture, GlobalForms, Sharp OSA Connector

Objectives:
Expand their green initiative by eliminating paper storage and the need for photocopies, while also providing the ability to easily find archived files, optimize application searching, and streamline forms management throughout departments.

ABoR is also using Square 9's GlobalForms® Web Forms Management solution in the IT, Finance, Events, Human Resources and Education departments. GlobalForms has digitized ABoR's AV requests, call support forms, onboarding and termination documents into web-based forms. One of their lengthiest forms processes - the affiliate break sponsorship form - has been completely automated, saving two employees over a months' worth of work. All users have to do is fill out the form, select the class they want to sponsor from a drop-down list, and hit submit – easy, right? The Affiliate department then gets notified and can approve or decline their request. This process previously took weeks to prepare, but with Square 9's solutions, now it only takes 1-2 hours. In addition, automated emails are scheduled to notify the user three days before the class starts, as well as one day after.

10% Increase in Productivity

Used primarily in their satellite and central offices, the IT, Finance, and Education departments have seen a 10% increase in productivity, especially when processing purchase orders. As purchase order forms are filled out in Microsoft Excel, they are saved and dropped into a network shared folder. Recognizing that a new document has been entered, GlobalCapture uses Zonal Templates to automatically fill index fields for the purchase order

Now that ABoR has simplified many of their time-consuming office processes, 15% of the paperwork in the office has been eliminated, giving them time to begin integration with SharePoint, so users can easily access all Square 9 products from one place. With plans to migrate the form creation process, ABoR is happy with the result of Square 9's solutions and the benefits they have brought to the organization. For more information on Austin Board Of Realtors, please visit www.abor.com.

15% of Paperwork Eliminated

Interview: Tyler Gelzaines

Junior System / Network Administrator, Austin Board of Relators

Q. What business challenges led you to discover Square 9's solutions?

Tyler Gelzaines: We are a "green" company, so we are always trying to reduce the amount of paper we use. So, when we were looking for a document management solution, a huge part of our initiative was to eliminate storage space by reducing the amount of paper we handle. Also, it had to be an optimized application so we could easily search and find archived member files in a large database of documents.

Q. How have processes changed since implementing Square 9's solutions?

Gelzaines: Several tedious processes have been simplified, which allows employees to focus on more important work on a daily basis. Our employee onboarding and termination process has also been streamlined and our Purchase Order process is almost entirely automated once a purchase order is submitted.

GlobalForms has also improved processes a great deal. For example, when an employee wants to opt in to work an on-call shift over the weekend, they submit an on-call support form. They enter which date they worked and electronically sign the form. It gets submitted to their supervisor who approves or declines the request, signs, and submits it to the Finance department.

The Events department also has also benefitted from automated web forms. When after-hour assistance is requested for technology and audio video needs, they fill out a form to notify IT of the security system requirements. Once the form is submitted we can then mark each item as complete, giving both the IT and Events departments full visibility into all upcoming events and which requests have been handled.

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>
> — *Austin Board of Realtors*

Q. In what ways has Square 9's product suite improved business performance?

Gelzaines: Departments have benefited greatly from Square 9's solutions. Overall it has reduced the amount of time we all spend importing and indexing, and accessing forms is now easy, straightforward, and everything ends up where it needs to be. Many of our lengthy form related processes have been automated and now notify each department of the pending requests. This allows for each department to know exactly where to access the information they need, with no searching necessary.

Q. Would you recommend Square 9's solutions?

Gelzaines: Yes, I would! The Square 9 support team is amazing, and they have been very helpful with any requests that we have. The products are also great and integrate very well with the business programs we use every day. So many of our processes are now automated and everyone has more time to spend helping the customer rather than searching for information.