## Document Capture Automation Enables Trucking Company to Go Above and Beyond to Deliver Your Freight Ahead of Schedule

With 20 years of experience in the distribution industry, JAS Trucking knows what their customers need in a delivery service. Offering a personal, customized experience, JAS prides themselves on ensuring every shipment arrives as intended – orderly, and on time.

But internally, JAS was not as confident in their paper handling processes, even with a document management software in place. Employees were struggling to manage files that were misplaced - or even lost - and their document management system failed to assist with the search and retrieval of information. In the best interest of their customers, JAS decided it was time for an upgrade.

With GlobalSearch®, an award-winning Enterprise Content Management (ECM) solution from Square 9® Softworks, JAS is confident they have found a software solution that could take their services above and beyond. The powerful search functionality within GlobalSearch, a favorite feature of JAS, has allowed employees to keyword-search their digital document database to locate data within document text, even image files. With GlobalSearch, JAS can easily track down the information they need, the moment they need it, to better service their customers, and their team. JAS has even customized the software to automatically send customers the exact data they need regarding their deliveries, providing them with immediate information on tracking, arrival dates and expenses. Plus, with real-time document updates, JAS has streamlined productivity company-wide, with improved collaboration and in-depth visibility into document processes to ensure no future document is misplaced.

Beyond intuitive search capabilities, the Safety Management department began using GlobalSearch to stay compliant with federal mandates. These regulations require JAS to maintain qualification files, accident reports, and driving violations from their team of 100 truck drivers. Not only is JAS avoiding compliance penalty fees, but when it comes time for annual driver reviews, staff can easily determine if each individual driver is fit to continue making deliveries. GlobalSearch gathers and displays the necessary driver information within a matter of seconds, saving the Safety Management

**Compliance Fees Avoided**

### Snapshot

**Industry:**
Distribution

**Departments Impacted:**
Accounting, Safety Management

**Featured Products:**
GlobalCapture, GlobalSearch

**Objectives:**
Upgrade from an outdated document management system to one with more intuitive search functionality, streamlining invoice handling and driver safety management.

team countless hours and unnecessary effort to locate paper-based files.

Driving their new-found efficiency even further, JAS implemented Square 9's Document Capture Automation Engine, GlobalCapture® which has taken over 100% of the company's invoice processing tasks. GlobalCapture automates the entire lifecycle from when an invoice is captured, to extracting its data, approval routing, and archiving – a process which previously required the time and attention of two full-time employees. As invoices are scanned in, the data is captured and validated with Optical Character Recognition (OCR) technology, then routed to the exact archive, folder, or person it needs to go to. This provides JAS with the confidence of knowing business data is being entered and processed accurately. GlobalCapture is also used for scanning and uploading all driver files, which has eliminated 40 hours a week in administrative time.

**40 Hours Saved a Week**

And as an added benefit, having everything in one central location allows employees to look at the same file, at the same time, eliminating the worry of who had a document last.

JAS Trucking has implemented GlobalSearch and GlobalCapture to nearly every aspect of their business and couldn't be happier with the benefits it's providing. For more information on JAS Trucking, please visit www.jastrucking.com.

# Interview: James Madison

Project Manager, JAS Trucking

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

**James Madison:** The document management solution we were using before GlobalSearch and GlobalCapture was very out of date, so we decided in order to take customer service to the next level we needed to upgrade to a system with more functionality. With Square 9's solutions we were able to do that! Not only do we love the search functions it offers, but it makes finding our misfiled documents so much faster and helps us to resolve issues a lot quicker.

### Q. How have daily processes changed since implementing GlobalSearch?

**Madison:** With GlobalSearch, we have the ability to search for customer files quicker and pull the exact information we need without having to put a customer on hold for an extended period of time. Invoice processing is also much easier than what we had before. It's easier to get the data together and make certain it's all in one place.

As far as the Safety Management department goes, processes have improved there as well. Federal rules require us to maintain what they call driver qualification files, an accident register, and all violations received by those drivers. But by scanning everything through GlobalCapture and storing it in GlobalSearch, I can look up that driver and do their annual review in moments and determine if they are still fit to continue to drive the vehicle. It also gives us a more permanent record of them, and an easy place to upload documentation on their training level and fitness levels.

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

**Madison:** Now that we have GlobalCapture, we have eliminated all paper-based processes in the invoice department. The safety team is also saving a great deal of time now that everything is automated because we have the system set to send information after it gets all the proper categories off the

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>
> **— JAS Trucking**

documentation, directly to the customer. That way if anything changes or is updated, they are notified automatically.

### Q. Would you recommend Square 9's solutions?

**Madison:** Yes, I would absolutely recommend it, especially for its ease of use. The layout is user friendly, and the software pretty much does the work for you. All you have to do is put the document on the printer or scanner and it captures the information right off the page, storing it exactly where it needs to be.

I also love the search function that allows you to search the text. This allows us to find things that are misfiled, as no one entering information can ever be 100%. We solve issues so much quicker now, and it's a huge time saver!