Case Study: Metro Door

How does a fast growing company with complex paper intensive processes streamline operations and open the "door" to a paperless system?

Metro Door is a unique combination of a manufacturing and service organization. Headquartered in Great River, NY the company serves the needs of major mall-based chain stores throughout the country for security closures--gates, doors and shutters. Started as a manufacturer in 1980, the company has expanded into a leading service provider, servicing not only its own products, but the overall needs of the chain stores. It's a business in which an hour can make a difference when a store can't open or close because of a problem with its security gate.   Every second counts.

But it's a business that was totally awash in paper. Every job requires a series of paperwork, from an initial work order dispatching the technician, to the signed work authorization, proof of completion, related parts invoices and engineering documentation.

Metro Door requires timely paperwork from its network of affiliated contractors to meet the strict business rules of major clients such as Home Depot, Starbucks and other leading retailers. Those business rules dictate how and when they must be billed, and what documentation must accompany any billing. _If the rules aren't followed, Metro Door can't get paid. It's that simple._

Drowning in paper.
As the volume of service calls reached over 5,000 a month, the company was drowning in paper. Every incoming work order and invoice was copied several times, one for accounting, one for service, one for billing. And chasing down paperwork to support an invoice for even a single service call was a major effort – let alone for the thousands a month that need to be handled.

Legacy systems reach their limits.
After an extensive search, Metro decided on SAP Business One from **Achieve IT Solutions** as the platform for its future integrated system. Dubbed **"Metro One"** the project was envisioned as a series of phases to gain control, streamline the business and move toward electronic communication and integration with customers, suppliers and partners.

Innovative IT Consulting was engaged by Metro Door to oversee, project manage and coordinate a complex effort that would touch every part of the business, from Manufacturing and Product Sales to Service, Billing and Finance.

Early on in the analysis phase, it was recognized that document management would be a crucial part of the solution.   Beyond just capturing documents, the challenge was to combine document management, workflow and business rules into a new system that would simplify the process, eliminate the paper chase, and respond to the demands of customers and suppliers alike.

Part of the Achieve IT recommendation was to bring in **Business One Certified Partner, Altec** for its ***doc-link™*** enterprise document management solution.   Not only did *doc-link* have a pre-built integration with Business One for routine tasks such as AP, but the open architecture of *doc-link* and its SQL-based environment represented a foundation from which to build a solution that could meet the complex set of Metro Door requirements.

***doc-link* and SAP Business One. Working together.**
So how does the new system work?   Business rules for every customer are defined in B1. Those rules specify which documents must accompany an invoice.

Every incoming work order, completion certificate and related invoice is scanned and indexed to the job number. All service personnel have access to documents on their desktop, accessible by job number, vendor, customer, project location - so they can review documentation, move them to problem statuses, and keep things moving.

Once a job is marked "complete" the B1 system is set up to query the *doc-link* database to determine when the required paperwork has been received. When this has been done, the job is ready to be invoiced, and appears in the billable queue.

When the job is invoiced. *doc-link* captures every outgoing invoice image automatically (no re-scanning).   Subsequently, *Output Manager processes the distribution of invoices, and can automatically attach any required supporting documentation that must accompany any of the invoices.*

Result. Less paper, less wasted time, more production and time for customers.
The team of Altec, Achieve IT and Innovative IT was able to collaborate with the team at Metro Door to help them accomplish their vision of a new way of doing business – one less dependent on paper and individual decision-making, freeing up personnel to really focus on service and customer contact.

Future phases are planned to include full electronic delivery of invoices and summary billing, other documents within the company, and vendor and customer access to job related information and documents.

Christine Vetrano, Metro Door CFO said, "We knew that there had to be a better way to run our business. . The combination of doc-link, Business One from Achieve IT and Innovative IT Consulting has helped us turn this idea into a reality. Metro Door is now positioned to continue its growth as a leading edge service provider".

Innovative IT Consulting.
Call us at 631-549-1685 or email psita@innovativeitc.com for a free consultation.