



“KwikTag’s ability to integrate with Microsoft Dynamics GP and fit into our existing workflow was a key differentiator, and one of the main reasons why we chose the product.”

Mike Wallace, Controller – Teavana, Inc.

**kwiktag**<sup>®</sup>

for Microsoft Dynamics<sup>®</sup> GP

Teavana, Inc. | Atlanta, Georgia

#### Customer Profile:

### Teavana, Inc.

Teavana opened its first teahouse in Atlanta, Georgia in 1997. Founded with the dream to introduce people to the aromas, textures and beneficial qualities of loose leaf teas, Teavana now has over 500 employees and 56 locations nationwide, with additional retail stores slated to open by the end of this year.

#### The Challenge:

### Bring Outsourced Accounting Functions In-House

In order to streamline and optimize their accounts payable (A/P) process, Mike Wallace, Controller for Teavana, was tasked with bringing outsourced accounting functions in-house. As he developed the plan for this large undertaking, Wallace recognized that Teavana not only needed to deploy accounting software, but needed a more robust integrated solution. Wallace’s vision was to architect a solution that would enable the organization to electronically store and retrieve invoices and accounts payable documentation directly from their accounting application. With this kind of integrated solution, Teavana could refrain from hiring additional headcount, streamline A/P’s workflow and keep filing and retrieval costs to a minimum.

## Overview

#### Summary

While undertaking the monumental task of bringing outsourced accounting functions in-house, Teavana, an Atlanta based food and beverage company, deployed an integrated accounting/ document imaging solution - resulting in significant cost savings for the organization.

#### Departments

- Accounts Payable
- Legal
- Human Resources
- Information Technology

#### Documents Scanned

- Invoices
- Accounts Payable Documentation
- Leases
- Personnel Records
- IT Documentation

#### Solutions

- KwikTag for Microsoft Dynamics GP
- KwikTag Basic

**The Solution:**

## Simultaneously Deploy and Integrate an Accounting and Document Imaging Software Solution

While searching the Internet for a document imaging solution, Wallace discovered ImageTag's KwikTag product. After exploring ImageTag's website and speaking with an account manager, he learned that not only would KwikTag fill Teavana's document imaging needs but it would also integrate with most accounting software programs – satisfying one of Teavana's key business requirements. "We had made the decision to bring accounts payable in-house and we were simultaneously investigating accounting software solutions and document imaging software... Once we found out that KwikTag would integrate with Microsoft Great Plains and fit into our existing work flow, the decision to deploy both solutions together was an easy one," explains Wallace.

Teavana embarked on the deployment almost immediately. Microsoft Great Plains was installed first and once that phase of the project was complete, it took a mere two days to install and integrate the KwikTag software application. The install was done remotely and followed up with a two-hour training session for the six users in the Accounting department who would use KwikTag on a daily basis. "The installation and training process was simple and actually shorter than I anticipated," reports Wallace.

Not long after the installation, the Accounting team was up and running with their new accounts payable responsibilities and the process of digitally filing invoices and documentation easily fit into their workflow. The new process is simple and straightforward. As they enter an invoice, they tag it with a KwikTag Label, key the KwikTag code into Great Plains and place the document into a KwikBasket. Once a day, someone on the team digitally scans in the documents in the KwikBasket and boxes up the paper invoices. "For now, we are storing the paper invoices in bankers' boxes, but after our audit this year, we anticipate being able to discard invoices as soon as they are entered into Great Plains and scanned into KwikTag." Wallace goes on to explain, "The process is working well and the Accounts Payable staff is happy with this new electronic filing process. For me personally, the biggest benefit is being able to retrieve and view invoices without having to leave my desk." Because staff members don't have to consume their time with tedious paper filing and retrieval tasks, Teavana has been able to delay the hiring of additional Accounting staff. Wallace estimates this is saving the company over \$30,000 a year.

Through water cooler chatter, the success the Accounts Payable team has experienced with KwikTag has spread throughout the company. Other departments have begun using the digital filing capabilities within the KwikTag standalone product and continue to find new and innovate ways to leverage KwikTag's capabilities. Human Resources, Legal and the I.T. department now store their documentation and important files in designated digital file cabinets within KwikTag. Not only does this make it easy to find, retrieve and share documents, but it ensures that should disaster strike, all of Teavana's critical company documents are safe on a backed-up and secure server.



# Results

### Quantifiable Cost Savings

By eliminating the costly paper filing and retrieval process, Teavana is able to refrain from hiring additional headcount – recognizing a savings of at least \$30,000 a year.

### No Paper File Cabinet Maintenance

Teavana does not need to purchase filing supplies, secure file cabinets or find floor space for additional file cabinets - all of Teavana's accounting documents are housed electronically on a secure, backed-up server.

### Instant Document Retrieval

The Accounting team can now access documentation instantaneously and directly from the software application in which they are working.

### Disaster Protection

In the event of a disaster, such as a flood or fire, Teavana's critical company documents are safe – stored virtually on a protected server.

### Better Accounting Control and Management

More convenient access to accounts payable documentation translates into more effective decision making and control.



ImageTag, Inc.  
7201 West Oakland Street Suite 2  
Chandler, AZ, 85226-2419

tel. 480.753.9300  
fax. 480.753.9400    www.imagetag.com

1.888.KWIKTAG | sales@kwiktag.com