



“Implementing KwikTag in our accounting department has saved me from having to hire at least one new person.”

John Cochennette, CFO – Rombauer Vineyards

kwiktag[®]

for Microsoft Dynamics[®] NAV

Rombauer Vineyards | ST. Helena, California

Customer Profile:

Rombauer Vineyards

Located in St. Helena, California, Rombauer Vineyards is a small family-owned winery with 45 employees. Rombauer Vineyards is known throughout the wine industry and by wine connoisseurs for their commitment to producing wine of superior quality. Rombauer wines are consistently ranked high in the wine trade journals and served in fine restaurants across the country.

The Challenge:

Paper Overload

Like many accounting departments, Rombauer Vineyards' accounting team had an overwhelming amount of accounts payable documentation to file, store and retrieve. Chief Financial Officer (CFO), John Cochennette, recognized the inefficiency of the current paper filing process and that the time his staff spent filing, retrieving and re-filing paper files could be better spent on other business priorities, “We were generating and storing a lot of paper and secondly, we wanted to be able to find a document quickly without having to search through a lot of paper files. In other words, we wanted to be able to access everything from our desktop instead of having to search through boxes.”

Overview

Summary

Rombauer Vineyards integrated KwikTag with their ERP system, Microsoft Dynamics NAV, as a solution to the copious amounts of paper documents in the accounting department. Accounts payable and accounts receivable now house all supporting documentation electronically and can access it with a simple mouse click.

Department

- Accounting
- Accounts Payable
- Accounts Receivable

Documents Scanned

- Invoices
- Packing Slips
- Purchase Orders
- Delivery Receipts

Solution

- KwikTag for Microsoft Dynamics NAV
- KwikTag Basic

The Solution:**Electronic Filing Integrated with ERP System**

Cochennette discussed these needs with Rombauer Vineyards' Microsoft Navision provider, who recommended ImageTag's KwikTag electronic filing solution. An online demonstration of KwikTag was arranged for Cochennette and his staff and it was quickly evident that this was the solution for the paper challenge facing their business. "From what we saw in the demos, we knew it was the solution that was going to work for us," explains Cochennette.

The installation of KwikTag and the integration into Navision was done remotely in just three days and the seven person accounting team was up and running almost immediately, after just a brief online training session. "It wasn't a long process at all. It's easy to use and there was no gigantic learning curve," says Cochennette. In addition to the quick and straightforward installation, the accounting team was able to leverage their existing digital scanner, allowing Rombauer Vineyards to begin using the KwikTag application without having to incur any further expenditures.

After the first few months of piloting the software with the accounts payable team, the company found applications for the KwikTag software in the accounts receivable department as well. The accounts receivable group now scans in all of the delivery receipts, from when wine is delivered to a customer, and attaches them to the invoices so they can be referenced directly from within Navision at a later date. Lauds Cochennette, "This has been a tremendous timesaver for us."

KwikTag fits seamlessly into Rombauer Vineyards' existing processes and the accounting team is currently scanning in more than 100 documents per day. The accounts payable or accounts receivable staff member simply tags the supporting documentation with a KwikTag Label as they are entering it into Navision, verifies the number on the tag matches the number in Navision and at the end of the day, electronically scans in the documents. If someone then needs to access a document, they can do so directly from Navision with just a click of the mouse. Staff no longer has to hunt through paper file cabinets to retrieve a document, only to have to re-file that document at a later date.

Rombauer Vineyards' accounting team has seen numerous benefits to implementing KwikTag. It has increased efficiency by removing the tedious task of filing and retrieval from the accounts payable and accounts receivable departments and it has enabled Cochennette to delay hiring additional headcount. It has even aided in their disaster recovery plan because paper documentation is now housed on a secure, backed-up server instead of in vulnerable paper file cabinets. The CFO explains further, "Because we now have so many of our paper documents scanned and backed up, we have the ability to easily go back and retrieve old documentation. As we get further down the road KwikTag becomes more and more useful to the company."



Results

Streamlined Filing

Instead of spending several hours weekly filing accounts payable and accounts receivable documentation, Rombauer Vineyards simply scans the documentation directly into their ERP system at the end of every day.

Centralized Electronic Repository

Rombauer Vineyards no longer has to worry about misplacing or misfiling accounting documentation, it is all housed in one central electronic repository on a backed-up server.

Increased Efficiency

With a streamlined filing and retrieval system in place, the accounting department has become more efficient and has not had to hire additional headcount as their business has grown.

Immediate File Access

Now when someone in the accounting department needs to view a document, they never have to leave their desk and are able to access it directly from their ERP system.

Improved Disaster Recovery Plan

In the event of a disaster, Rombauer Vineyards has a secure electronic backup of all accounting documents.



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