



KwikTag fits seamlessly into our existing accounts payable processes. Instead of filing and retrieving paper invoices the old-fashioned way, they are now digitally scanned and instantly accessible directly within our ERP system, Microsoft Dynamics GP. ”

*Philip Neufeld, CEO – Britz Fertilizers, Inc.*

**kwiktag**<sup>®</sup>

for Microsoft Dynamics<sup>®</sup> GP

Britz Fertilizers, Inc. | California

#### Customer Profile:

### Britz Fertilizers, Inc.

Britz Fertilizers, Inc. is a full service California agricultural retailer and wholesaler of fertilizers, chemicals, seed and a wide variety of on-farm services. Using state-of-the-art satellite imagery and GPS data, they also have the ability to remotely analyze soil and vegetation to provide insight into a crop's health. Britz employs over 250 people and has 11 locations throughout California.

#### The Challenge:

### Filing Too Resource Intensive

With multiple locations and business units, Britz needed a streamlined way to file, retrieve and store purchasing documents. Their current process was to store invoices, purchase orders and bills of lading in paper file cabinets. An accounts payable clerk was responsible for filing and retrieval. Once annually, Britz would dedicate a staff member to retrieve all the previous year's files from the cabinets and box them for long-term offsite storage, in order to make room for new files. Not only was this process tedious and error-prone, but retrieving a file from the offsite location required time and resources that could be better spent on other business priorities.

## Overview

#### Summary

Britz Fertilizers, Inc. integrated KwikTag into their ERP system, Microsoft Dynamics GP, in order to electronically house their purchasing documentation. This solution enables them to reduce filing and retrieval costs, while at the same time, securing and safeguarding their critical company assets.

#### Department

Accounts Payable

#### Documents Scanned

Purchase Orders  
Bills of Lading  
Invoices

#### Solution

KwikTag for Microsoft Dynamics GP

The Solution:

## Electronic Filing

CTO, Philip Neufeld, set out to find a software solution that would meet their business and document management requirements. The software application had to be able to both import and export documents and accept all types of paper documents. Technically, it had to integrate seamlessly with their ERP system, Microsoft Great Plains, and just as importantly, it had to be an affordable and cost-effective solution. After a considerable amount of research, the one software application that could meet all these needs was KwikTag. Not only was it the ideal solution for the accounts payable department, but it had the ability to become a document management system that could be utilized across the organization.

The KwikTag installation took just three days, including the integration with Microsoft Great Plains. Training the accounts payable department was equally as simple, and within a couple of days, the 10-person team had integrated KwikTag into their daily business processes. "One of the major benefits of KwikTag is that it puts the point of identification within the existing business processes without adding additional work," explains Neufeld. Previously, an accounts payable staff member would enter an invoice or purchase order and then place it in a bin for a clerk to file. Now, when the invoice is entered into Great Plains, they tag the document with a KwikTag Label, verify the number on the tag matches the number in Great Plains and put the document in a bin for a clerk to pick up and digitally scan. Once the document is scanned, the KwikTag software reads the KwikTag Label and automatically associates each image with the corresponding posting in Great Plains. With virtually no additional steps and the same familiar workflow, all accounts payable documents are now stored electronically and available for retrieval with just one click.

The benefits of KwikTag have been realized across the organization. Accounts payable response time to inquiries has decreased and filing costs have been reduced, as they no longer have to utilize offsite storage for past purchasing documentation. Security and disaster recovery have also been enhanced now that their important paper files are stored electronically on a secure and backed-up network, instead of in vulnerable paper file cabinets.

The initial deployment of KwikTag has been so successful that Britz plans to rollout KwikTag to the rest of the company in the fourth quarter. "We see multiple uses for leveraging KwikTag across the organization. Our future uses for KwikTag include, at a minimum, accounts receivable, leases, contracts and general corporate documentation," states Neufeld.



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# Results

## Reduced Filing Costs

Documents are now housed electronically, eliminating the need for long-term offsite storage and saving the company valuable time and money.

## Eliminated Misfiled Documents

Storing and retrieving documents electronically ensures that critical business documents are not misfiled or misplaced.

## Increased Business Efficiency

Accounts payable has improved their response time and has freed up resources that were previously dedicated to filing and retrieving paper documents. Papers now only have to be handled once and Britz can redeploy resources to other critical business activities.

## Streamlined File Retrieval Process

Purchasing documents are now accessible directly from Britz's ERP system, Microsoft Dynamics GP. Staff members can now retrieve the electronic documents almost instantaneously and without ever having to leave their desks.

## Improved Security and Disaster Recovery Plan

Storing documents on a secure and backed-up network instead of in paper file cabinets ensures the protection of vital company assets.



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