

# DRAG & DROP CAPTURE TO FIT THE CLIENT



## CHALLENGE

Gold Star's in-house document management system couldn't separately archive and index email attachments. Personnel were required to print and scan critical email correspondence and attachments, resulting in unnecessary expense to the business.

## CLIENT

### Gold Star Transportation

Overland Park, KS



Gold Star Transportation is a highly successful logistics partner focused on truckload, flatbed, refrigerated and Less-Than-Truckload (LTL) freight. The company serve a diverse client base including many Fortune 500 companies nationwide.

## SOLUTION

S4i's Desktop Capture enabled necessary email and attachment processing, and the team provided custom integration to fit Gold Star's accounting system and multiple databases.

## BENEFITS

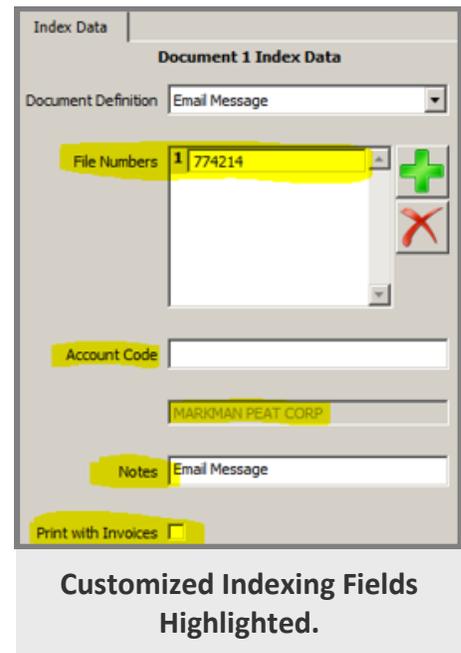
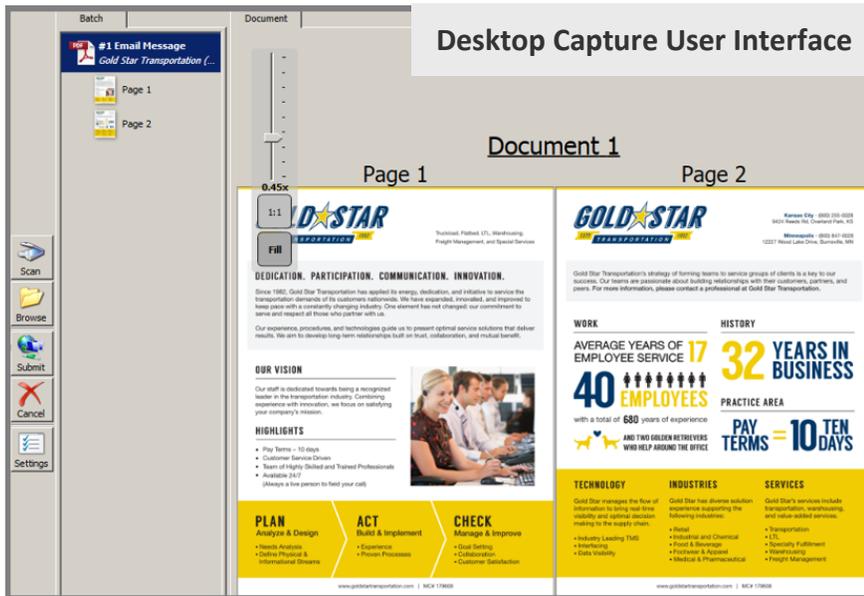
- Increased user efficiency to process and index any type of document
- Files archived in their original formats
- Drastic reduction in paper output

A key aspect of Gold Star's renowned service entails ongoing communication and accurate data sharing with shippers, carriers and internal personnel. Until 2013, the company utilized an in-house content repository to index and store client and shipment information. However, Gold Star couldn't separate attachments from their emails in order to archive and index them with a load record. All attached files such as bill of lading or invoices had to be opened, printed and scanned. This resulted in a very time-consuming process. Internal developers created an Outlook plugin which partially resolved the issue. The missing link was inability to archive documents in their original format.



Mark Ratterree—IT Manager at Gold Star

Mark Ratterree, IT Manager at Gold Star, set out to find an alternative solution. His research efforts led him to S4i Systems. "My original goal was to find a software add-on to handle the email attachment issue. After reviewing at least 12 document management companies, **I realized an off-the-shelf product was not going to work.** I was then introduced to S4i. They gave me an in-depth demonstration of Desktop Capture. I was extremely impressed. What caught my attention even more – they offered development assistance to integrate the solution into our existing infrastructure. My project scope may have expanded, but it was exactly what we needed."



## IMPLEMENTATION

After initial specifications were shared with S4i's development team, Desktop Capture was modified to fit Gold Star's requirements. Field labels were changed to fit the transportation industry nomenclature, and data points were added to match Gold Star's internal workflow.

Custom development took six weeks to complete, and minor adjustments were made based on user feedback. For Mark, the results far exceeded his expectations. "Just as we strive to be a reliable partner with our clients, S4i has done the same with us."

User training was completed internally by Mark. "With the modifications in place, it was easy to transition to the enhanced system. The software interface is user-friendly and offers more capabilities than we had before."

## RESULTS

Within the first 12 months, Gold Star has indexed more than 610,000 documents with S4i's Desktop Capture. Brokers and accounting staff are the primary users. "Since the original print-and-scan process has been eliminated, we have saved a tremendous amount of paper and ink. We also like the 'drag-and-drop' feature, where a document can be pulled into Desktop Capture and users can extract, rearrange and store only relevant data before attaching it to a load record. If pages are not required, they can be stripped out before indexing occurs. Another key advantage – we can batch scan many documents and index them individually on the same screen."

Overall, Gold Star Transportation is pleased with the new streamlined, efficient process. As Mark summarized, 'If we had purchased software off the shelf, we would have been forced to modify our processes and terminology to fit the package. It was the other way around with S4i. They did an incredible job customizing Desktop Capture to fit our environment.'

***"The software interface is user-friendly and offers more capabilities than we had before."***

## WHY S4I?

Gold Star required a product that could conform to their own system. Desktop Capture conformed to their needs and S4i's development team was able to integrate the product with existing resources.

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