

DRAG & DROP CAPTURE... IT'S SO EASY!

THE 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.

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.

CLIENT



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.

THE SOLUTION

Mark Ratterree, IT Manager at Gold Star, set out to find an alternative solution. His research efforts led him to S4i Systems; now SMRTR™. "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 [SMRTR]. They gave me an in-depth demonstration of Desktop Capture; [now SMRTR 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

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

After initial specifications were shared with SMRTR’s development team, SMRTR 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.

For Mark, the results far exceeded his expectations. “Just as we strive to be a reliable partner with our clients, SMRTR 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 SMRTR 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 SMRTR. They did an incredible job implementing Desktop Capture to fit our environment.”

THE BENEFITS

Increased user efficiency to process and index any type of document

Files archived in their original formats

Drastic reduction in paper output

WHY SMRTR?

Gold Star required a product that could conform to their own system. Desktop Capture conformed to their needs and SMRTR’s professional services team was able to integrate the product with existing resources.

SMRTR (an S4i Company)

info@smtrcms.com

+(949) 366-5234 | (800) 231-5280

