



Customer Profile

Summit Brands shines up their AR Deduction and AP Invoicing processes with UnForm Document Workflow



Facts at a glance

Product: [Infor ERP FACTS](#), [UnForm Document Workflow](#)

Industry: Distribution

Country: USA

“Our ERP was working well but so much paper work was getting delayed that it was starting to become difficult to service our internal and external customers efficiently. We needed to have 100% traceability.”

-Tami Mayer, Manager IT, Summit Brands

About the Company

Based in Fort Wayne, Indiana, [Summit Brands](#) has been family owned and operated since 1958. The company focuses on delivering highly effective and sustainable niche household cleaning products to the global retail market. Their brand portfolio includes Super Iron Out®, Glisten®, Plink® and OUT®.

For more information about Summit Brands visit: www.summitbrands.com

Unplugging accounting

UnForm Document Workflow eliminated the piles of paper requiring approval that used to go from desk to desk--sometimes getting lost and nearly always causing delays. Now our CFO can electronically see that the AR Deductions and AP Invoices have the right signoffs and that all the correct documentation is attached. We are getting payment issues resolved quicker on the AR side, and taking better advantage of vendor discounts on the AP side--freeing up thousands

of dollars that we can use in other parts of the business.

The bottom line, we were able to grow the company significantly over the last five years, without adding people to the accounting or MIS department—Doing more with less is sort of the mantra around here! On a funnier note, since we no longer have any paper copies we have turned our large file room into an extra board room.

The last mile

Scaling up a distribution business is not for the faint of heart. It is a constant battle to improve efficiency—finding ways to get orders out quicker with fewer errors, reducing the cost of handling inventory and paperwork—and the list goes on. At Summit Brands the Infor ERP FACTS system had allowed us to get the control we needed, eliminate the paper and begin to scale. We had been using the print and document image management capabilities, a product of UnForm who is an Infor Solution Partner, to reduce our outbound paper. However, despite all the investments, we were still drowning in the paper coming into our AR and AP departments. We were handwriting payment deductions on paper copies of our customer invoices which were then sent to our sales representative who signs off on the deduction, then sends it back to accounting. Our Grocery channel has an especially high number of off invoice adjustments, as is pretty standard in that channel.

We were processing thousands of them per month, some falling through the cracks between accounting and sales and others sitting on a sales rep desk. Our AR collections were falling behind. A decision was made to go completely paperless and purchase an Infor ERP FACTs compatible workflow product. We started looking at Workflow systems and developed very simple criteria for the selection of a vendor; the system should fit into our existing Infor ERP system, it should be easy to learn, scalable, and a reasonable cost to purchase and support. As an Infor ERP FACTs customer, we realized we were already running UnForm for Archive Document Management and that the UnForm Workflow Product would be a seamless add on. It also met all our criteria; it was reasonable in price, the system is easy to learn, scales

easily and requires very little support. Nearly immediately we were able to eliminate paperwork getting lost and delays in deduction resolution and AP Payment processing. We now have 20-30 people using it on a daily basis. The ability to track, at a glance, where all our outstanding items are in the process has been a huge help. Things don't get missed like they used to and it's really easy to pinpoint the bottle neck areas and address those issues. We never formally undertook an ROI calculation on the system, however considering the reduction in time to get AR invoice issues resolved, the amount of vendor discounts we can now take advantage of on the AP side, and how happy our customers and vendors are, we are very confident the payback was just a few months, tops.