



>>

## Centralized Document Distribution

### Higher Productivity, Improved Customer Service, and Efficient Access to Information

Tacke + Lindemann introduced ELO<sup>professional</sup> to optimize their business processes and to make information available on demand. Centralized incoming invoice processing affords the company controlled transparency and helps it to meet discount deadlines. The ELO business partner seamlessly integrated the ECM system into the IT landscape of the Dortmund-based company, connecting all relevant departments. Tacke + Lindemann benefits from centralized document distribution, a reduction of the required archiving space, and the ability to quickly respond to queries from customers and partners.

Tacke + Lindemann has been a trader of construction fittings, tools, and metal wares since 1899. The company has also been offering fastening systems, special tools and insulating materials for 30 years and provides customers with additional services ranging from project planning and delivery through to assembly.

*“The ELO business partner convinced us that ELO is precisely the solution we needed: A system that seamlessly and readily integrates into our IT landscape and offers an intuitive user interface [...].”*

Karsten Esser,  
IT Director at Tacke + Lindemann



>>

## Investment Transparency

### Overview

Country: Germany  
Industry: Trade

### The Company

Tacke + Lindemann has been a trader of construction fittings, tools, and metal wares since 1899. The company has been offering fastening systems, special tools, and insulating materials for 30 years and provides customers with additional services ranging from project planning and delivery through to assembly.

### The Challenge

Introduction of a company-wide ECM system for centralized electronic document distribution. Implementation of an electronic incoming invoice processing solution. Integration of the entire order and merchandise management system and integration with the Multi-Pro ERP system. 40,000 invoices to be archived in electronic format only.

### Solution

Use of **ELOprofessional**, seamless IT integration with business applications via the Business Logic Provider. Mapping of processes in **ELO**, use of **ELO** workflows for invoice processing, automatic storing of autonomously generated receipts directly from the corresponding business application.

### Benefits

Lightning-fast information retrieval, no redundant storing, vast time savings in several workflows, limited size of paper-based archive.

### Products Used

**ELO** Client, **ELO** Fulltext, **ELO** BLP, **ELO** BLP Outputmanager, **ELO** BLP Connect, **ELO** BLP Barcode.

Whether they work in wood or metal processing, industrial insulation, maintenance of industrial and communal businesses, or architectural offices, professionals rely on the high-quality brand portfolio and sound advice of the experts staffing the owner-managed trading company. With local offices throughout the country, Tacke + Lindemann offer their customers top quality and flexibility.

### Clever Expansion

With every new office they opened, Tacke + Lindemann faced new challenges in distributing paper-based documents. Eventually, the management decided to introduce an enterprise content management (ECM) system. After evaluating several ECM manufacturers, **ELOprofessional** and the **ELO business partner** were found to best meet the company's requirements.

"The **ELO business partner** convinced us that **ELO** is precisely the solution we needed. A system that seamlessly and readily integrates into our IT landscape and offers an intuitive user interface. As we are a relatively small company, we wanted to spend as little time and money as possible on extensive training and adjustments to the software in our IT environment. In the end, **ELO** turned out to be precisely the solution we had been promised," says Karsten Esser, IT Director at Tacke + Lindemann, explaining why the company opted for **ELO**.



## Getting the Project Underway

The project was launched in May 2009, and the pilot installation went live in August. As of May, all new paper-based documents, including incoming invoices (40,000 per annum) or delivery notes are digitally archived in **ELO**. This saves the company a lot of space as it no longer needs to dedicate new rooms to storing paper documents. Also, trade templates offered by the business partner, which can be used as out-of-the-box software solutions for specific industries, further helped to greatly speed up the document archiving and filing workflows.

## Seamless IT Integration

The next step involved integrating the ECM system into the existing IT landscape of Tacke + Lindemann and mapping the accounting, legal, sales, data processing, and business organization departments in the **ELO** archive. The **ELO business partner** did this based on the **ELO Business Logic Provider (BLP)** and also integrated the in-house MultiPro ERP system, which handles the company's order and merchandise management. The BLP processes all autonomously created receipts based on rules and the customized business logic and automates tasks such as keywording, archiving, record generation, rights assignment, and launching workflows.

## Trouble-free Incoming Invoice Processing

Centralized incoming invoice processing based on **ELOprofessional** enables Tacke + Lindemann's employees to rapidly retrieve information, work in a controlled and transparent environment, and meet discount deadlines. Before **ELO** was in place, an incoming invoice had to circulate among several desks in the office and would often spend long idle times before it was passed on to the next department. In the event of queries, the document had to be hunted for in the corresponding departments, which was often a very tedious process. All in all, the process was highly unwieldy and lacked transparency. But with **ELO** the workflow now looks very different: All incoming invoices are immediately scanned into a temporary directory in **ELO**. The responsible accounting employees generate tasks for the receipts stored in **ELO**. These define, for example, whether the document concerned is a goods invoice connected to an order; if so, the invoice is linked to the order in the merchandise management system, thus allocating it to the corresponding supplier. **ELO** then automatically archives the invoice in the respective archive structure and releases it to the **ELO** workflow for further processing. During processing, the invoice can be accessed from the central ECM archive to answer customer or supplier queries.



## Meeting Discount Deadlines

When an invoice has not yet been paid after circulating for two weeks, it is automatically retrieved by a reminder function, guaranteeing that no discount deadlines are missed.

“The centralized electronic incoming invoice processing workflow results in major time savings and makes the process very transparent. We rely on our experience for performing final optimization measures; this includes identifying any special conditions that may apply and defining associated special rules,” says Karsten Esser, describing the invoice processing procedure with **ELO**.

## Automatic Archiving Based on Barcodes

The company receives roughly 500 proofs of delivery every day. Invoices are settled using the customer’s receipts, so when a customer cannot find this document, they often turn to Tacke + Lindemann. In the past, this meant that the staff had to find them manually – often after a long, tedious search – and then fax them to the customer. Today, the whole process only takes a few seconds; Karsten Esser explains why: “Our proofs of delivery are marked with a barcode. Once the customer returns the signed proof, we scan it. The **ELO Business Logic Provider** reads the barcodes and makes sure that the receipt is automatically archived at the correct location. When asked for them, it only takes a few seconds to look up the POD and mail it to the customer directly from within **ELO**. This is a huge improvement compared to the old process.”

*“The centralized electronic incoming invoice processing workflow results in major time savings and makes the process very transparent. We rely on our experience for performing final optimization measures; this includes identifying any special conditions that may apply and defining associated special rules.”*

Karsten Esser,  
IT Director at Tacke + Lindemann



>>

## Finding, Not Searching

*“This greatly eases the task load of our employees, allowing them to retrieve documents at the push of a button and then instantly carry on with their work. Gone are the days of hunting for information in paper-based archives.”*

Karsten Esser,  
IT Director at Tacke + Lindemann

### Benefits of Fulltext Search for Goods Picking

Tacke + Lindemann attaches GLS packaging or other labels to packing slips and the associated delivery note. The delivery notes are scanned in **ELO** and added to the fulltext index. This allows employees to find the delivery note by looking up the GLS package number in **ELO**, which means they do not require any customer data. The benefit becomes apparent when discrepancies occur that are not obvious when checking the customer delivery note, for instance, if a package number has been attached to the wrong delivery note. Previously, solving this problem could take as long as an hour. Now, users simply enter the GLS number into **ELO** and have an answer within a matter of seconds.

### Lightning-fast Searches

Users greatly appreciate the search option via the **ELO BLP Connect Deskbar** – an input field provided in the Windows desktop task bar. Employees can enter the search term, for example, the receipt number, customer name, etc., and pick predefined criteria to decide where **ELO** should search. A simple and effective mechanism, as Karsten Esser agrees: “This greatly eases the task load of our employees, allowing them to retrieve documents at the push of a button and then instantly carry on with their work. Gone are the days of hunting for information in paper-based archives.”

### Everything is easy, everything is ELO

This expression has emerged among the employees of Tacke + Lindemann reports Karsten Esser, who initially did not dare to hope for such a positive user acceptance: “At first, we were skeptical after introducing yet another business application. But instead of resentment, our users are demonstrating downright excitement about this tool.”



>>

## Low Training Expense

*“At first, we were skeptical after introducing yet another business application. But instead of resentment, our users are demonstrating downright excitement about this tool. For our employees, operating ELO is a highly intuitive process, and they really love the search feature.”*

Karsten Esser,  
IT Director at Tacke + Lindemann

For our employees, operating **ELO** is a highly intuitive process, and they really love the search feature.” The user training required was therefore kept to a minimum. IT-savvy key users receive more in-depth **ELO** training and pass on their know-how to colleagues during their daily work. Approximately 40 employees are actively using **ELO**.

### Summary and Outlook

Karsten Esser’s gives his impression of the ECM solution in a nutshell: “We no longer file away paper documents. Given a volume of 40,000 invoices each year, this is a very tangible benefit. Also, we can now distribute documents much faster than before. **ELO** provides us with an overview of all relevant documents and receipts related to a business case, enabling us to quickly respond to customer queries.”

Tacke + Lindemann is planning to add e-mail archiving and e-mail management features in the near future.