CASE STUDIES

Catholic Purchasing Moves Processing Operations to Windows Servers, Upgrades eForms to ACOM's EZeDocs for Windows, Initiates Web Order Entry

THE BACKGROUND

When a company has 42,000 customer accounts, several hundred vendors and a total staff of only 28 employees, efficiency and short cuts aren't just conveniences, they're necessities.   That's exactly the situation at Catholic Purchasing Services, Inc., a Newton, Massachusetts company that sets up and services contracts between vendors and religious/non-profit organizations across the country. Last year, the company built bigger business muscles by upgraded its automation capabilities with new back office software and ACOM's EZeDocs for Windows.

Catholic Purchasing originated in Cleveland, Ohio as a centralized purchasing service for a limited number of Catholic dioceses.   Subsequently, the company moved to Boston with the objective of extending its services nationwide. Catholic Purchasing   Services' product reach is extensive, ranging from appliances and furniture to electronic office equipment, kitchen equipment, food, lighting, pews, vestments and more.

"What we provide our customers," says Assistant Controller Jerry Kennedy, "is a single entity for ordering and paying for products, as well as for managing the details of their orders. Because we serve as their central, volume-buying intermediary, we earn discounts that are passed along to them. We don't handle or inventory any product. Orders come through us, we process them and send them to the vendors, and the vendors drop-ship the merchandise to the customers. We invoice the customers. They pay us and we pay the vendors. Vendors like us because they can serve a large group of clients and have only one place to bill."

Until recently, Kennedy and his team operated for more than 10 years using an IBM AS/400 computing platform and a native RPG software package for database, order entry and accounting activities. Several years ago, Catholic Purchasing also obtained ACOM's EZPrint/400 electronic document output management software system. EZPrint/400 enabled the company to convert pre-printed, paper-based forms to electronic form templates, and to produce the forms as needed on plain paper, using laser printers situated on the AS/400 network. EZPrint/400 users saved time and money, enhanced efficiency and increased productivity by converting expensive, labor intensive preprinted business forms to digitized documents that could be laser printed and mailed or faxed to customers, suppliers and employees.

The company converted its purchase orders, acknowledgments, invoices, and statements into electronic forms, and also developed some specialized forms, including a re-order form and an order confirmation form. Purchasing staff would accept orders from customers, enter the information in the database, and the appropriate forms would be generated for mailing as they were needed – some individually, others in batch at the end of each day..

THE PROBLEM

With the availability of the Internet, the World Wide Web and electronic commerce, new opportunities began to emerge and Catholic Purchasing sought to incorporate web-based ordering and processing into its operations. Unfortunately, the web arrangement that was available with the company's existing back office software was disappointing. "Even after one and one-half years of effort, it never worked right," Kennedy said.

Moreover, Catholic Purchasing faced a $100,000 upgrade if the company were to retain the AS/400 hardware and operating system as the primary computing resource. All things considered, Kennedy felt that he had to find an alternative solution – hopefully one that would allow the company to preserve as much as possible of its existing procedures.

Upgrades to the PC network were already in work, so Kennedy focused on locating a solution that would run on in the Microsoft Windows environment. He found his money-saving solution at a trade show: eNsite Pro, a Windows-based solution from Data Distribution Management Software (DDMS), Fort Worth, and the Dealer Station real time ecommerce solution (DDMS edition).   The combination integrated eNsite to the web and thus, to vendors that wanted to do web marketing.

The only problem remaining concerned EZPrint/400. The electronic forms solution did not translate to the PC environment and Kennedy wanted to stay with electronically generated output for his most crucial documents. In the AS/400 environment, the forms fed directly into a job queue, for example, while their Windows counterparts were generated as text files. The DDMS software had an electronic forms library but it was extremely basic, and Kennedy was used to the versatility of the EZPrint/400 solution.

THE SOLUTION

In Spring, 2002, Kennedy learned that ACOM had announced a forms solution for the Windows environment - EZeDocs for Windows - that not only incorporated all of the capabilities of EZPrint/400, but which was built-out as a robust back office document output management solution, complete with electronic communications.

Accessible across a company's network, EZeDocs for Windows is modular solution that, like EZPrint/400, enables Windows-based businesses to convert their paper-based forms processes to an electronic environment. But it also offers a choice of output and delivery options that includes laser printed copies, automated fax, email, web posting, PDF and electronic archive – all executed directly from the user's workstation.

THE IMPLEMENTATION

Kennedy purchased the EZeDocs forms generation engine, along with the graphical user design tool, and professional forms design service. Since the forms had to be rebuilt, he also arranged for DDMS programmers and systems analysts to work directly with ACOM's professional services department, with ACOM implementation specialists responsible for the final form designs.

The bulk of Catholic Purchasing's business is now conducted on the Windows network, but procedurally, little has changed. The same six forms perform the same functions, but now everything is done in graphics, where on the AS/400 it was all green-screen – including any modifications to forms, which had to be done using x-y coordinates.

SUCCESS!

"I can modify forms very simply now," Kennedy says. "In the AS/400 green-screen environment it is a far more complex operation. In the future we will also have the option of implementing electronic document delivery and electronic archiving procedures within EZeDocs."

Customers can still order through direct contact with Catholic Purchasing personnel, but increasingly they are able to speed up their ordering process by going to the web. With some vendors, they can even access product catalogs on the web, check Catholic Purchasing's pricing structure there and place their orders. The orders forward to Catholic Purchasing and are entered into the DDMS database, and the documents that initiate the sale are produced and mailed.

Customers ordering products from Boise Cascade, for example, can go to the company's site, select the Catholic Purchasing account, and select their merchandise. Merchandise is drop-shipped directly to the customer. The order information immediately transfers to Catholic Purchasing, which processes it, creating the payable file and the invoice file.

"Nobody has to retype anything," Kennedy says, "and at this point, about half of all of our invoices are done this way. We also avoid having to create a bigger customer database."

The ROI on the new solution was immediate, he adds, referring to the far lower expenditure for the DDMS back office software and the EZeDocs forms solution.

"Instead of spending $100,000, we were up and running with the new solution for about $40,000 and furthermore, we didn't have to do any web development," he says. "The new solution is all graphics, and employees find it much easier to use. In terms of operating savings we probably won't realize any impact, since we were already reaping the benefits of electronic forms processes under EZPrint/400 and we were very satisfied. In fact, had we stayed with AS/400, we certainly would have stayed with EZPrint/400 or upgraded to EZeDocs/400, which offers the same powerful capabilities as EZeDocs for Windows."

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