

imageWARE CASE STUDY Property Management Invoicing



OVERVIEW

WORKFLOW

SOLUTION

SUMMARY

Canon Solution: imageWARE Scan Manager and imageWARE Document Manager

1

General Overview

Property management professionals handle nearly every type of real estate transaction. They work closely with real estate owners—both residential and commercial—developing customized programs that sustain high levels of occupancy and tenant satisfaction while lowering property costs and enhancing its value. Property managers focus on maintaining operational efficiency by analyzing operating expenses and financial statements, making recommendations for improvement, and developing strategies specific to each property. They also provide clients with customized property and accounting financial statements as well as operating cost benchmarks to help them manage the property efficiently and within budget.

2

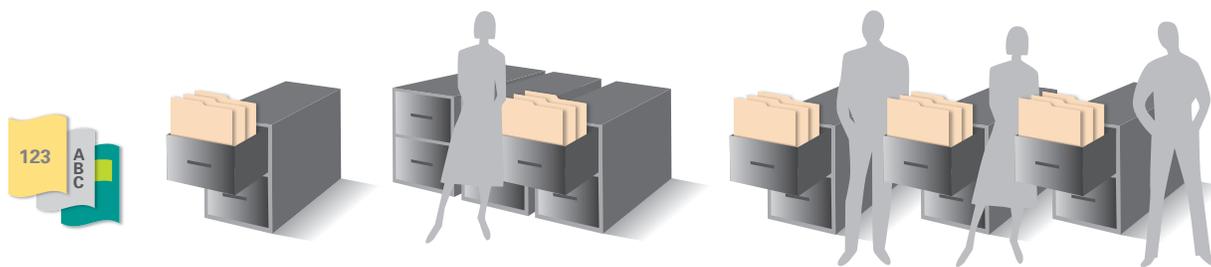
Customer Workflow and Issues

The customer—a property management firm specializing in residential and commercial property management and real estate sales—realized it needed to review business workflows as a result of a recent acquisition of another company. Coupled with the acquisition, it had managed a successful growth program in which the number of customers, properties, and assets increased over forty percent. As a result of this growth and expansion, business processes and workflows suffered. The firm’s operations had become increasingly inefficient with multiple manual and paper-intensive processes. The customer had accounted for an increase in operational costs at the time of the acquisition but did not anticipate the rapid rate at which it increased. Their current staffing and workflows were insufficient for the new workload.

The firm’s most critical business pain points were with customer invoicing and rental agreement workflows. The increase in the volume of paper created, received, and mailed was overwhelming. Costs of day-to-day operations were rising; postage, couriers, and office supply expenditures were exceeding their limits. On-site paper storage was also at capacity due to the immediate influx of additional paper. This produced a negative impact on research and on-demand document retrieval because of the increased time spent searching and retrieving invoices and agreements as well as a decreased customer service response.

With all the new work and fast growth, the firm felt it couldn’t operate business efficiently. With the assistance of Canon’s Professional Services and their Authorized Canon Dealer, they assessed their situation and determined that they required a robust workflow solution that could meet their business needs and help them convert manual-based invoice and agreement workflows into electronic-based processes. Process assessment indicated that such a solution would help the firm achieve a key goal of eliminating manual workflows and creating process efficiencies.

Customer Workflow Prior to Implementing Canon Solution



Invoices

Invoices and Rental Agreements received via mail and processed.

Filing

Invoices and Rental Agreements filed by property group and date received.

Physical Storage

Invoices and Rental Agreements stored on-site in filing cabinets.

Retrieval

Employees look up customer requests in storage. Once located, information is sent via fax or mail.

Canon Solution Overview and Components

After careful consideration of several solutions, the customer determined that imageWARE Scan Manager v4.1 and imageWARE Document Manager, combined with the Color imageRUNNER C3380 device, would help them achieve an efficient scanning workflow with little manual intervention. The question, then, was how to implement this solution. Working with their Authorized Canon Dealer, it was determined that Canon Professional Services (CPS) would be able to meet the tight deadline and demands of the customer. Working in unison, CPS, the Dealer, and the customer collaborated in the design of the Canon solution.

Selection of imageWARE Document Manager was appropriate for the customer's workflow, as it was the logical progression from imageWARE Scan Manager. The firm's need to have all invoices and agreements stored electronically was paramount to alleviating the on-site storage capacity issue. imageWARE Document Manager provided a central application to manage and edit digital documents electronically, thereby eliminating the need for on-site storage and reducing postage and courier costs.

To automate invoice and agreements processing, imageWARE Scan Manager was used to create scanned worksheets and indexes, which were used for scanning and releasing documents from the Color imageRUNNER C3380 device into imageWARE Document Manager. Canon imageWARE Scan Manager helped create efficiency and establish a new end-state environment that decreased the amount of manual intervention in the customer's invoice and agreements processing. Automation of these workflows, which was the customer's top priority, exceeded manual processing limits and helped manage the increased volume of invoices and agreements.

Customer Workflow After Implementing Canon Solution



Invoices

Invoices and Rental Agreements received via mail.

Scan Recognition and Index Application

Invoices and Rental Agreements scanned through the Color imageRUNNER C3380 device. Documents recognized by bar code, zone OCR, and form recognition, then indexed.

Electronic Repository

Invoices and Rental Agreements stored in Canon imageWARE Document Manager central repository.

Record Retrieval

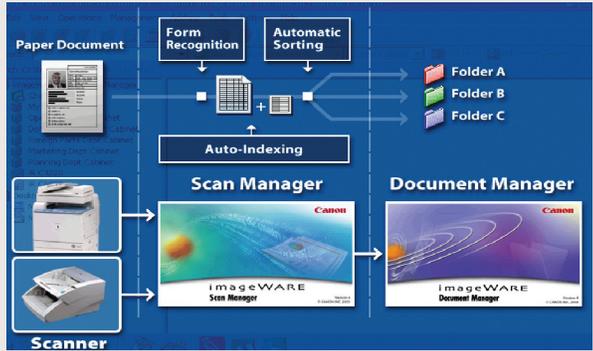
Search imageWARE Document Manager for customer documents from desktop. Send records directly from imageWARE Document Manager to customer's e-mail via direct integration with e-mail client.

4

Summary

With the proposed Canon solution, the customer realized the following benefits:

- Expedited delivery of invoices to customers
- Efficient management of incoming invoices
- Reduced postage, courier, and office supply costs
- Alleviated on-site storage and retrieval issues by providing a digital document repository for invoices and agreements
- Improved customer service via fast document retrieval
- Accomplished more work without increasing staff



Canon provided a combination of hardware, software, and professional services to streamline the invoice and rental agreement creation and storage process for this property management company. Canon Professional Services was able to address workflow pain points created by the customer's growth and business expansion. The necessity for a robust capture application integrated with a document management system in a distributed scanning environment was essential in transforming the customer's workflows.

After the implementation, the customer commented that the solution from Canon provided a seamless document workflow solution. The integration of imageWARE Scan Manager, imageWARE Document Manager, and the imageRUNNER device delivered a complete solution to their manual processing issues. CPS was essential in helping the customer achieve their new end-state environment by working closely with them and assisting in building a true electronic automated document workflow that eliminated their business pain points. The customer further commented on Canon's state of the art technology, which has helped transform their business to a 21st century company. As a testimonial to their Canon solution, the customer is now assessing deployment of the solution to their parent office.



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