



Kingston & Associates Marketing LLC

Kingston Companies Speeds Safely to the Right Markets at the Right Time with the Help of IKON and Fortis

Summary

Kingston & Associates Marketing LLC (Kingston), based in Idaho Falls, Idaho, is one of the largest distributors of fresh produce in the United States primarily to the wholesale food service industry and major restaurant chains.

As a distributor of a diverse product line encompassing potatoes, onions, lettuce, broccoli, tomatoes and pineapples, Kingston needs to closely manage its many relationships and transactions with both its suppliers and its customers. Kingston has for several years used the FAMOUS™ produce distribution software system, which enables it to manage US produce purchasing, inventory, sales orders, invoicing and accounts payable and receivable. The FAMOUS™ software required printing hard copy reports. The resulting hard copy was moved through the business in the order fulfillment process, and then retained and filed to maintain paper archives for business and compliance reasons.

With a significant portfolio of produce types, a large stable of suppliers, national accounts and as an increasing burden of paper archives, Kingston's business strategists knew they needed to take their order management to a paperless level to sustain efficient and cost-effective growth.

The **Fortis** document management solution, implemented for Kingston by IKON, has achieved the targeted level of paperless business process improvement for Kingston. In four short months, all printing and production of paper in the order processing, accounts payable and accounts receivable processes have now been "turned off." Order processing, accounts receivable and PACA compliance are being achieved while eliminating any need to create paper archives.

"We like the FAMOUS software. What we needed to further improve our business was to find a solution that could electronically integrate the output of that software to the rest of our business. The **Fortis** solution, provided to us by IKON, satisfies that need for us. Additionally, as compliance issues become more rigorous, **Fortis** keeps us a step ahead" says Bill Tanner, Corporate Controller.

Industry: Food and Beverage

Location: Idaho Falls, Idaho

Westbrook Partner: IKON Office Solutions

Return on Investment:

- Improved business processes for 500 sales orders daily
- FDA and PACA compliance
- Elimination of paper reports, with associated improvements in storage and archiving costs as well as report distribution costs
- Dramatically improved access to customer service information
- Improved accounts receivable performance

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Business Challenge

FAMOUS™ is an integrated, specialized ERP system, tuned to the fresh produce distribution marketplace. For Kingston, it does a great job of managing produce inventories and provides excellent tool for data-mining information for its Sales Division.

Kingston's order processing, compliance, accounts receivable and accounts payable processes all were increasingly stressed as a consequence of the paper reports generated from the FAMOUS™ system. Despite the electronic systems, business processes and compliance were being managed by shuffling paper throughout the office.

Key to the Kingston process and business is their customer service representative(CSR). The CSR was faced with managing the input and processing of orders by using paper outputs from FAMOUS™. For each order, a sales pouch is created, consisting of several reports printed from FAMOUS™, including order confirmation, purchase orders, inventory/batch information, etc. Considerable business process inefficiency was present at Kingston, having to do with the hard-copy sales pouches, handling, filing and retrieving of this paper by the CSR, routing of the sales pouch around Kingston, and coordination of order information with activities in accounts payable and accounts receivable to reconcile financial transactions with order activity.

The information in the sales pouches required significant routing around the company to facilitate queries and to complete the accounts receivable process. Once orders were completed and accounting transactions verified, the sales pouches then needed to be safeguarded and archived for FDA and PACA compliance reasons. Kingston was collecting "boxes and boxes" of order records that required dedicated and increasingly expensive real estate for archive storage.

Kingston knew that to continue to improve order management performance, as well as to facilitate further efficient and cost effective growth, an electronic solution was needed.

Business Solution

IKON, an existing Kingston vendor for office solutions, approached Kingston with an electronic solution to this problem. IKON was able to demonstrate to Kingston their understanding of the Kingston business issues involved and their ability to effectively address those issues through an approach employing PlanetPress (to capture FAMOUS™ reports) and Captaris (to capture inbound faxes) as integration points to the **Fortis** enterprise document management solution.

To eliminate the paper-based sales pouches, the PlanetPress software package has been configured to electronically capture reports, and create electronic sales pouches in place of paper sales pouches produced by FAMOUS™. For each produce order, order confirmation, purchase order and invoice and other FAMOUS™ outputs.

In total, approximately 5-8 paper items for each order are now replaced with an electronic "sales pouch" image, and one single piece of paper – a master reference page for each order. Through integration of PlanetPress with **Fortis**, these images are automatically placed into the **Fortis** document management repository. Complementary index data is also automatically generated during the PlanetPress electronic imaging process.

To further eliminate paper document dependency, the Captaris plug-in software solution was implemented to capture incoming faxes as electronic images which similarly moves these electronic images into the electronic process.

Fortis is now electronically providing controlled access to hundreds of order-related documents generated daily that previously moved around Kingston in paper form. As an additional benefit, the secure and searchable Fortis environment, from the moment the information is created ensures complete compliance with the increasingly rigorous FDA requirements.

After four months of use, Kingston was able to "turn off all printing." The CSR now manage the orders, from their creation through the distribution and fulfillment process, electronically. Accessing the electronic order documents through the **Fortis** repository allows multiple department access to supplier and customer source documents. Additionally, the accounts payable and accounts receivable functions can now resolve the status of payables and receivables by referring to original electronic documents and more efficiently process those business functions.

Finally, Kingston has eliminated the need for expensive physical storage since implementation of this solution.

Benefits Achieved

Kingston has, in six months of using the new **Fortis** document management implementation, achieved a number of business benefits, which include:

- Integration of FAMOUS™ with the rest of the business. **Fortis** enhances the FAMOUS™ program with better integration with the rest of the business, external documents, shipping and status details, and archives.

- Improved business process: the order process is now managed through an electronic medium rather than a combination of electronic systems and paper. It also eliminated the problem of multiple parties requiring access to the paper sales pouch at the same time. The sales pouch can be updated and kept accurate easily and efficiently.
- Customer inquiries: With a greatly improved ability to search for and access order documents, Kingston provides higher service levels.
- Accounts receivable: Has experienced improvement in efficient with the ability to electronically check, verify and progress orders status and receivables. Improved cash collections.
- Compliance: With electronic capture and ability to search and receive sales pouches, individual documents, delivery receipts, shipping information and other documents, FDA

requirements to comply with the "one up and one down" rule, respond to FDA inquiries. Records are much less susceptible to loss or misplacement, and can be accessed easily within compliance deadlines.

According to Ryan Cheney, Kingston's IT director, "**Fortis** has enabled us to operate a virtually paperless business. An entire order, as handled by our CSR's, now involves only one piece of printed paper, as a master reference, and we have completely turned off the printing and paper archiving aspects of our business. This has provided great benefit to our business competitiveness, ability to comply with the PACA, and ability to efficiently and cost effectively grow and diversify."

Next Steps

With the success of the application of enterprise document management to the order management process, Kingston is next looking to implement **Fortis** in its real estate and other divisions.



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