

## GlobalSearch Solved the Root of Paper-Based Problems at Agricultural Retailer, Heritage Cooperative

“Working Together. Winning Together,” that’s the Heritage Cooperative moto. But with an outdated document management system, the agricultural retailer wasn’t winning at all. Serving over 3,500 farmer members and 4,000 customers, Heritage was facing difficulties locating important document data across their 30 locations. When it came to storage, retrieval and collaboration, Heritage needed better insight into their large team of 260 employees, to ensure document processes were completed accurately and efficiently – and Square 9® Softworks helped them do just that.

Why Square 9? Well, beyond the company’s innovative solutions and reliable service, one key feature made them stand out from the competition – custom integration with AgVantage, Heritage’s accounting software. Square 9 built Heritage a custom solution that fit exactly to their business needs.

With GlobalSearch®, Square 9’s award-winning Enterprise Content Management (ECM) solution,

Heritage can now instantly search and retrieve information from any Accounts Payable document that goes into the system, improving collaboration and increasing

employee productivity by just under 20%. Heritage utilizes Image XChange® – an extended search feature of GlobalSearch – enabling employees to search content stored in GlobalSearch, directly from AgVantage in just one click! By simply hovering over data within AgVantage, Image XChange is triggered to automatically display all stored documents relating to the search criteria, without ever opening the GlobalSearch interface.

In addition to GlobalSearch, Heritage has also implemented Square 9’s capture automation engine, GlobalCapture®, with advanced document capture features which have made routing and directing information a whole lot easier. As records are scanned into the system, GlobalCapture captures and classifies them. Whether purchase orders, invoices, or other accounting documents, processes are kept organized from the very beginning. The solution then automatically extracts pertinent document information, validates the data, and then routes it to a folder, employee, or directly to AgVantage for further processing. Instead of printing a document, emailing,

### Snapshot

**Industry:**  
Agriculture

**Departments Impacted:**  
Accounts Payable

**Featured Products:**  
GlobalSearch, GlobalCapture, Image XChange

**Objectives:**  
Simplify collaboration by integrating a document management solution with their existing accounting software, reducing storage and paper-based processes around the office.

or faxing it, they are simply scanned and digitally managed, which alone is saving Heritage 20 hours a month in time savings. In addition, email notifications are set dependent on the document type, automatically sending to the necessary staff member, notifying them of a document requiring their attention, for review or approval.

In addition, GlobalCapture’s extraction tools ensure that all captured data is not only accessible, but accurate as well. With validity checks built in, GlobalCapture provides Optical Character Recognition (OCR) confidence reporting, to ensure that information being captured and moved into AgVantage is accurate. That way, when an employee goes into the system to search for a key piece of information, everything is valid and stored where it should be, for stress-free search and retrieval.

Thanks to Square 9’s solutions, Heritage is saving nearly \$4,000 a year, simply from eliminating offsite storage, file cabinets, printer and paper costs. They have been able to integrate their existing accounting software with a proven Enterprise Content Management system, built to streamline efficiency while providing improved insight into business intelligence. For more information on Heritage Cooperative, visit [www.heritagecooperative.com](http://www.heritagecooperative.com).

\$4k  
Saved a  
Year



## Interview: Lyle Gottfried

Chief Financial Officer, Heritage Cooperative

### Q. What business challenges led you to discover Square 9's solutions?

**Lyle Gottfried:** We were already using a document management system before implementing GlobalSearch and GlobalCapture. As time went on, we realized we were lacking easy retrieval of documents, and we wanted to reduce storage space in and outside of the office. But, our main focus was finding a solution that would integrate seamlessly with our accounting software, AgVantage. Square 9's customizable solutions allowed us to do all of the above.

### Q. How have processes changed since implementing Square 9's solutions?

**Gottfried:** Now with Square 9's solutions, we have the ability to set up automatic emails that can go directly to the intended person. So, instead of having to print out documents, email or fax them, employees can receive the necessary information and documents right to their inbox. Productivity has gone up a great deal now that this several step process has been automated and it has also helped ensure things get where they need to be on time.

### Q. In what ways has Square 9's product suite improved business performance?

**Gottfried:** With Square 9's solutions, now that we no longer need to buy new file cabinets, and paper and printer costs have gone way down, we are saving on average, \$300 a month. All of our Accounts Payable documents are now in one place and we don't have to keep going back and forth between applications to find what data and documents we're looking for.



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— Heritage Cooperative

### Q. Would you recommend Square 9's solution?

**Gottfried:** Yes, having the ability to quickly retrieve documents is great and the GlobalSearch system is easy to use. Having the ability to collaborate and find documents and data in our accounting software was very important to us, so finding a software that could integrate with it was huge.