



Elite Wireless and Property Companies

Achieving the paperless office: Document Management and Workflow for Business Operations

Products used: LiveForms and Docubase for workflow automation and company records management.

BACKGROUND

Established in 2012, the Elite Group of Companies has businesses across diversified verticals including being one of the largest operators of Cricket Wireless retail stores with hundreds of employees, and a property holding company focusing on commercial properties.

Due to its rapid growth and the broad nature of its businesses, the company needed to find a way to manage the wide array of documents used in the organization, and at the same time automate key processes that currently relied on paper forms and e-mail workflows.

The main requirements for the solution desired were:

- A centralized digital document repository able to capture and securely store a wide range of document types, including invoices, contracts, leases, mortgages, and other financial records, and allow for quick search and retrieval of the documents when needed.
- The ability to migrate all paper based forms to electronic format, and model the workflows associated with them to reduce manual processes and eliminate errors.

WHAT WERE THE CHALLENGES?

- The retail operation consists of over 60 locations across the state, each with its own set of documents to be tracked and managed, including invoices, utility bills, leases, etc. This was being managed in an ad-hoc manner, sending everything to the central office and having someone process and store them in filing cabinets.
- The retail locations are divided into districts, with store managers responsible for their location reporting up to a district manager. In order to ensure a consistent customer experience across all locations, district managers frequently visit stores and meet with store managers to perform store audits. Information from the audits was being captured on paper forms which were then emailed back to the central office for processing.
- The property management company needed to keep track of different types of documents associated with each of the properties, including its leases, tenant communications, vendor documents, utilities, etc.

All of these challenges generated a large amount of different document types, in varying formats, all of which were being handled manually, greatly impacting the efficiency of company operations, customer experience, and the ability of the company to continue its growth trajectory and scale.

SUMMARY OF THE SOLUTION

First, the need for a centralized document management system was addressed with Tessi Docubase, a secure and easy to use Document and Content Management System. With dbs' professional assistance, the system was configured to reflect the multiple companies under one umbrella, with retail operations having a separate database from the property management company within the same system. This allows the company to have separate secure and centralized document repositories that can be accessed by different employees. Access to the documents is controlled by granular permissions for users, allowing departmental users to work with documents only for their departments, while executive management users have access to all documents in the system.

Next the dbs team tackled the task of designing the different forms needed to support the operation and creating the workflows associated with them to minimize manual processing. This was accomplished in a matter of days with dbs LiveForms, a low-code forms and workflow solution. Several custom forms were designed and deployed, including:

- **Site Visit** form used by DMs to document their store visits. This form guides the manager through a checklist, providing feedback and suggestions based on the information being captured from the current and prior visits. Once completed the form captures the required signatures and is routed back to the GM at the home office for review, and stored for retrieval at any time.
- **Overtime approval request form** used by location managers to expedite requests for overtime approvals from DMs, with 48 hour escalations to GM if a request is not reviewed on time.
- **Time edit form** used by hourly employees to request changes to the timesheets that have already been submitted electronically. Upon submission, this form is sent to DMs to make changes in the time clock system, and is sent to HR for final review and ensuring the adjustments are reflected in payroll.

- **Remote employee equipment form** used to capture employee assigned equipment information and ensure acknowledgment from the employee regarding the terms under which the equipment is being assigned.

The combination of Docubase and LiveForms has transformed the way in which the company manages its documents and processes. Now there is a single location where all documents across the organization can be accessed from any device by authorized employees. The forms have greatly improved the efficiency of the operation giving field employees more time to spend with customers, and new forms can be designed and deployed quickly as needed without having to involve specialized IT resources.

WHAT BENEFITS WERE ACHIEVED?

- Secure centralized digital storage of all document types from across the different business puts information at the user's fingertips from any device at any time.
- Custom forms and automated workflow frees up employees and management to focus on more valuable customer facing tasks.
- Reduction in errors and omissions which were present with paper based processes.
- The company now enjoys an affordable, complete document management solution.

DEPLOYED SOLUTION FEATURE SET

- dbs LiveForms with drag and drop forms designer, workflow, and business rules engine.
- dbs forms design and technical assistance service.
- Docubase Document Management including indexing, secure storage, and retrieve functionality.

“dbs consistently delivers above and beyond expectations, with great software and even better support services, allowing us to focus on what matters most - our customers.”

~ David R, President at Elite Wireless Group

