

Financial Case Study

GeldXpert Nijverdal



X-Solutions®

ScanFlowStore®



The Challenge:

- To find a solution that provides a centralized storage location, a consistent filing structure, an easily retrieval process, and a reliable bulk scanning method.

The Solution:

- Xerox WorkCentre Pro and ScanFlowStore software which scans to a central server instead of individual desktops.

The Results:

- A simple scanning solution that stores scans in a centralized location in searchable PDF format, saving time and effort for all employees while improving customer relations and response time.



Xerox
Business
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Financial Case Study

Customer Profile

GeldXpert is a financial service provider. The organization has around 20 locations throughout the Netherlands. These locations are small franchises and operate autonomously under the name of GeldXpert. Usually these franchises are small companies that are integrated in the local community to establish a good customer relation.

The Challenge

GeldXpert Nijverdal is a location that is quite innovative concerning new software and hardware solutions for their operational management. 2.5 years ago when they bought a Xerox DocumentCentre, scanning already was a key issue for them. Xerox offered them Scan to Desktop to process their scans. This combination resulted in some problems.

Because the documents were not stored on a central location, not everybody who needed these documents could access them. Furthermore the employees all used their own filing structure and different names for the documents. This made it difficult to use documents that were scanned by a colleague. Because the scans were all converted to normal PDF files it was very hard to retrieve lost documents.

Bulk scanning was very difficult as well, due to the amount of scans sometimes the computers crashed. This was a big problem at GeldXpert because they were scanning many documents on a daily basis.

The Solution

The scan problems at GeldXpert were the trigger to offer ScanFlowStore. The employees of GeldXpert were skeptical about the new solution because of the history with Scan to Desktop. But after the installation they started to work with it and found that it delivered as promised. The scans are stored in the folder of the person that scans. This way he or she can always check where the scanned files are stored, but because the scans are placed on a central server, they are never lost like before.

Furthermore because of the conversion to Searchable PDF they can retrieve documents much faster than before. At GeldXpert they also make good use of the Shortcut functionality in ScanFlowStore. The shortcuts are used to name the different scanned documents. This way everybody uses the same names and directory structure.

Most of the scanning at GeldXpert is done by the management assistant although everybody is using the scan functionality on the Xerox. Because the scans are stored on the server anybody can access the files which was difficult before.

Because scanning is made easier, the scans are made more frequent which has reduced the physical archive. The file cabinets that are still present at GeldXpert Nijverdal will probably disappear in the near future when all the hardcopy documents they contain will be scanned and stored digitally.

Currently all the documents concerning a client are stored on a central location, and accessible to all the employees. This way they can serve their clients better and more efficient.

Thanks to ScanFlowStore the day to day activities at GeldXpert have improved significantly. The scans are now made without any problems which saves a lot of time and money

The Results

- Scanning without problems
- Scans to central server instead of different desktops
- Converts scans to searchable PDF files
- Physical archive reduction
- Time and therefore money advantages
- Simple scanning for all the employees
- Better customer relation management because all documents and files are easy and fast accessible

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getting results.*

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