

Bolt Supply EZIndex Success Story: Automated Vendor Invoice Indexing

A Building Materials Customer Success Story



Overview

Bolt Supply operates fourteen branch locations for industrial products across Western Canada. The company was established in 1948 as a locally-owned family-operated business supplying fasteners in Calgary and the surrounding area. Lawson Products Inc acquired the company in 2017, and Bolt Supply continues to run as an independent subsidiary of Lawson Products Canadian division. The company's stated mission is to distinguish itself through a commitment to customers and ongoing improvement in every aspect of the business.

Background

MaxRecall was originally implemented in 2007 as the enterprise document management solution,



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handling documents generated by their ERP as well as external physical documents received by snail mail or fax that were scanned and added to the archive. The MaxRecall relational database facilitated the ability to view related documents within a transaction cycle, such as AP Purchase Order, PO Acknowledgement, Receiving and Packing Slip, Vendor Invoice, and AP Check. Initially, ERP-generated documents were delivered to the MaxRecall repository on a fully automated basis, and third-party scanned physical documents required some manual operator indexing, with much of the required keyword metadata coming from automated ERP database integration.

The Challenges

Bolt Supply had experienced significant growth in its business. The number of AP purchase cycles (Purchase Orders, AP Vendor Invoices, etc.) had increased exponentially over time. The majority of AP Vendor Invoices were now being received via email. With an ever-greater workload to the AP department coupled with the burden of the COVID pandemic crisis, Bolt Supply needed a more efficient means to capture documents and index documents into the MaxRecall archive repository.



The Solution

In response, Bolt Supply asked MaxRecall to implement the WebAccess browser-based platform that supplements and extends the MaxRecall functionality. WebAccess allowed work from home access to document processing for the Bolt team members. The WebAccess email manager, split/sort/merge, and most importantly, EZIndex were configured to address full automation of AP invoice delivery, indexing, and archiving, greatly enhancing the company's AP process workflows. EZIndex recognizes the AP vendor invoice publisher and applies OCR technology to index the keyword metadata. The AP department team established email server rules to route AP invoice attachments to a WebAccess staging folder.

Benefits Realized

WebAccess significantly reduced the AP processing workload for Bolt Supply as a fast and efficient processing workflow, regardless of the invoicing source. EZIndex minimizes the AP department's time spent indexing documents. By eliminating the cost and complexity of a separate manual third-party invoicing process, Bolt Supply can handle high transactional volumes and redeploy valuable human resources to better support and grow other vital interests of the business.

Your Next Steps

[Download the MaxRecall Company Overview eBook](#)

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[Talk to MaxRecall about finding the best option for you](#)



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