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Automating an Industry: How Associated Business Systems Helped a Real Estate Giant

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Managing documents for a corporation consisting of more than 700 salespeople spread out among 20 offices across the Pacific Northwest can be a daunting task to say the least. It's an undertaking Prudential Preferred Properties faces each and every month.

"With literally thousands of real estate transactions per month, we operate a very paper-heavy business," said Sean McRae, the real estate company's IT director.

According to McRae, the average real estate package contains between 50-150 pages. This is due to the fact that from the time a house is listed to when a buyer makes an offer to the closing, all of the information is documented on paper.

Like most traditional real estate companies, Prudential would gather the paperwork and sent it to a central processing office—in this case Portland, Oregon. Managers in the office would gather the documents for a contract and route the information through the organization using a combination of faxing, outside courier services, and employees personally delivering the documents.

If you had a customer that had to tackle a similar challenge on a monthly basis, how would you help that company manage such a massive amount of paper more efficiently? What solution would you recommend?

THE ANSWER

As the vendor for Prudential, Associated Business Systems—a Ricoh, Kyocera Mita and HP dealer based in Tigard, Oregon—proposed combining the conglomerate's existing fleet of Ricoh multifunctional systems with an integrated document management system from DocuWare (www.docuware.com) to automate its entire business process.

"I saw the MFPs as the perfect platform to build an application to automate the process," said Kevin Gullickson, a solutions specialist for Associated Business Systems.

Through a series of meetings, Gullickson and McRae formed a vision for how the process could be facilitated using scanned images. They developed a plan to have the sales representatives gather all of the information for each sale in Microsoft Outlook. As a common email application, Gullickson and McRae surmised this would help lead to rapid end user adoption.

Every time a salesperson landed a new deal, they simply created a new folder in Outlook and dropped all of the relevant documents into the file. In order to make this process as uncomplicated as possible for sales representatives, two common technologies were leveraged—scan-to-email and a fax server.

Scan-to-email allowed the salespeople to use the MFP to scan documents to their email inbox and fax numbers were configured to allow inbound faxes to be routed to sales representatives' email. Once in the Outlook inbox, the attachments are dropped into the appropriate folders.

This, however, was just the beginning of Prudential's new automated process:

1. When all of the relevant documents for a sale are gathered, the sales representatives can drop the information into a new folder in the DocuWare document management system. The folder is indexed with multiple fields, including customer name, sales rep name, transaction number, and status.

2. Barcode technologies were implemented to provide each internal form with a unique barcode. As documents are dropped into the DocuWare folder, barcode recognition technology automatically categorizes and arranges the folder based on the form type, meaning sales representatives do not have to be concerned about the order of the paperwork.

3. The workflow automation component in DocuWare automatically routes these documents to the branch administrator for review. If the administrator is satisfied that the file is complete, DocuWare's electronic rubber stamp is used to mark the file "approved."

4. The file is then routed to the list of pending sales at the corporate office. Closing coordinators review the file to ensure it is complete. If it looks good, the file is sent to the closing department.

At any stage of the process the file can be rejected and sent back for the correct documents to be added. When branch administrators log into DocuWare they can see a list of files that have been rejected. The sales representatives can then be notified to gather the appropriate paperwork.

5. The closing department can either print or email the completed file in digital format.

6. After closing, the appropriate signed documents are added to the customer's file. The file is then assigned a status of "complete" and permanently archived.

THE BOTTOM LINE

The net result of this application is a smoother closing process. Documents are now routed electronically through a predictable workflow. When one department is done with a review it is instantly transmitted to the next step—cutting out the time, expense and hassle of courier services, hand delivery and faxing.

"With the incredible volume of transactions running through this company, the workflow module was the most appealing part of the package," McRae said. "Now documents can flow smoothly through our internal processes and land at the closing company complete and on time."

Additional payoffs for Prudential included:

- Simple cost savings were realized on paper and courier expenses. Increased productivity also led to staff savings as well.
- With the streamlined workflow, transactions can be processed in less time. This can lead to faster closings, translating into a competitive advantage for the agency.
- The DocuWare document management system also includes Internet Server, an optional module that allows users to view documents securely over the Internet. Sales representatives can log in from any Internet-enabled computer and view the documents related to their transactions through Microsoft Internet Explorer.
- Real estate companies can be audited by state agencies as well as by their franchisor, such as Prudential. These auditors want to ensure all of the files are complete and in compliance with government regulations. Having all of the documents securely organized in a document management system helps reduce the risk of incomplete documentation. With the Internet access component, auditors can be issued a temporary password and complete their work remotely.

FUTURE APPLICATIONS

McRae is currently working with ABS to develop electronic signature capabilities. This would allow clients to sign electronic documents using Tablet PCs or USB signature pads, which is similar to what you see when you check out of most retail stores.

"We are excited about this technology," McRae said. "It is amazing what an impact this has had on our business."

Impacting its customers' businesses is exactly what Associated Business Systems is always seeking to achieve, and it's something that all dealers should try and accomplish for that matter.

"Being able to help make a big impact in our clients' offices is what our solutions department is all about," Gullickson said.