

IMAGING AT:

Charles Cudd Co., LLC

WHO IS CHARLES CUDD CO., LLC?

Charles Cudd is an award-winning contractor with a rich history and philosophy that is recognized as an industry leader in luxury homes. Based in Minneapolis, MN they have been designing and building homes for more than a quarter of a century. They have set the standard for excellence in fine new home design and construction. By setting the standard, they understand the need to grow and evolve the needs of their customers, the construction industry and their employees through research and technology.

GETTING STARTED ...

Charles Cudd's initial goal was to integrate Timberline, their current accounting software, with electronic job files and invoices. Upon attending the TUG Conference and speaking with Construction Imaging Systems, Charles Cudd knew that CIS had the solutions and the experience to meet their goal. With the solution that CIS offered, not only would they have an electronic copy of the job documents and invoices – there was a bonus, the ability to expedite their approval process of invoices and routing of job documents. Integrating CIS' Invoice Router and Job Document Router would prove an essential key to their day-to-day processes. With the help from Construction

Imaging Systems, all routing of job related paper would now be done electronically. This gives Charles Cudd unlimited advantages: secured access to any job documentation with a few clicks of the mouse; a paper trail of the document's history; the alleviation of filing or the chance of misfiling; less copies being made; and reducing the cost of routing the paper to job sites for evaluations and approval.

INTEGRATING ACCOUNTS PAYABLE'S TIMBERLINE® WITH INVOICE ROUTER

The scanning of all incoming invoices is a daily routine for the Accounts Payable Department. Working with images rather than paper enables their staff to link all related documents within a central database and use the capabilities of the accounting and imaging software to expedite the approval process.

ARCHIVING OF PURCHASE ORDERS

Purchase Orders are entered into Timberline® and "scraped" into Construction Imaging Systems' Invoice Router. Scraping is the process of taking specific information or data from one program and populating fields in another. By using the scrape feature, there is less room for error and double keying is eliminated. The indexed purchase orders can be viewed securely by any authorized imaging user at any time.

Charles Cudd Fast Facts:

- Location: Minneapolis, MN
- Contractor: Residential Home Construction
- Installation Date: 02-16-2004
- System Payback: 6 months
- Accounting Software: Timberline





"Nearly every employee within the organization has been affected by the imaging system. However, the most dramatic example of this is our accounts payable person. She has realized a huge time savings by no longer chasing invoices around the office. There is no longer any physical moving of paper for sorting, getting invoice approvals, filing of open invoices, matching with checks, filing of paid invoices, etc. I would estimate that somewhere between 25-40% of her day-to-day job has changed. Along with time savings, we make far less mistakes and we do not lose/misplace documents."

– B. Smith (CFO)

ROUTING OF INVOICES

Invoices are entered into Construction Imaging Systems' Invoice Router. The Invoice Router's user friendly screens include functions that simplify the routing process. A key benefit in Invoice Router's Route Invoice is the Lookup option. Lookup fields for Vendor Number and Vendor Name allow for input of either one. For example, if you know the vendor name but not the number enter the name and hit tab. The vendor number will populate in the corresponding index field. This holds true for Job Number and Job Name. An automatic lookup for approver populates the name of the approver based on the job number entered. Once the required index values have been added to the Route Invoice Screen, it is ready to be routed. With a click of a button, the index information and the image are saved within the imaging system and the approver is notified via e-mail and/or CIS' Doc Notify®. Doc Notify® polls the imaging database and alerts users by displaying a box on their desktop informing them of "waiting invoices".

APPROVAL OF INVOICES

Invoices waiting for approval can follow a predetermined chain or can be routed to any imaging user. Invoice Router's Approve Invoice Screen is not much different than the Route Invoice Screen. The invoice's image and index information is displayed on the screen and organized in a way that allows the approver to review, add or change the enter information. If backup documents are needed before the invoice is approved, the Search for PO Button and the search for Job Files Button can be used as a short cut to view all related invoice information.

ENTERING INVOICES INTO TIBERLINE®

Approved invoices are viewed in Invoice Router's Index/Entry Screen. The AP Clerk can view all approved invoices or invoices that they routed for approval. When the invoice is selected the AP Clerk can view all of the invoice information including the distribution and the image. The invoice is ready to be entered into Timberline®. Keying from the screen allows the AP Clerk to enter

the invoice data which is organized in the router window – there is no hunting for cost codes, notes or approval codes. When the invoice is posted in Timberline®, the related invoice data is automatically transferred into the imaging system.

AUTOMATIC BACKFILL FROM TIBERBERLINE® TO INVOICE ROUTER

The process of transferring data from Timberline® into the imaging is called "Backfilling". The backfill provides the imaging system with important invoice information like the check number and the check date. Also, the backfilling of the multiple cost codes for an invoice allows quick searches for all invoices with certain cost codes. If any changes are entered into Timberline® it will automatically change the values in the imaging system. This keeps both Timberline® and Invoice Router data parallel.

PROJECT MANAGERS BENEFIT FROM CIS'S CONSTRUCTION DOCUMENT MANAGER

All job documents are scanned into CIS's Construction Document Manager. Project Managers have the ability to review job information, add supporting documents, route job documents to other PM's and e-mail job documents to people outside the company (sub contractors and customers). Construction Document Manager includes many company benefits. Job Documents can be reviewed by more than once person at a time, an electronic paper trail shows when the document was entered, when it was routed, who it was routed to, and whether the recipients have read the document or it is still waiting. Project Managers have already built job folders using "Doc Types" to organize and file their job documents such as contracts, drawings and change orders.

ADDITIONAL IMAGING BENEFITS

Using ApplicationXtender's® Outlook E-mail tie-in, incoming e-mails are automatically archived with index values and a copy of the e-mail. Specific index values within the imaging application are mapped to the fields in Microsoft® Outlook.