



Retail Services

Merchandise Accounting

Optika Retail Customers

BMC West Corporation

Costco Wholesale

Eddie Bauer

House of Fraser

J. Crew

Lillian Vernon Corporation

Lowe's Company

Makro de Columbia

Menards

Nordstrom

Payless Cashways

Peebles Department Stores

Pharmor

Ross Stores

Safeway

Sidon Farben

Spiegel

Swiss Colony

The Home Depot

Western Auto

Business Problem

In the retail industry, customer service, transaction cycle time, and quality are the keys to market leadership. Effectively coordinating efforts across a geographically dispersed collection of retail stores and suppliers can be a daunting task. To remain competitive, a streamlined process that can efficiently capture, route and store the wide variety of documents that define retail business transactions is essential. More importantly, quality must be maintained without slowing transaction cycle time. This must all be accomplished while effectively managing the cost of doing business.

Merchandise accounting operations require timely, effective management of paper-intensive retail transactions. Purchase orders, invoice requests, bills of lading, receivers, and vendor contracts are just a few of the complex documents that are received from customers, vendors and retail stores. Documents supporting the transaction come from multiple sources - fax, mail, and hand-written and computer-generated internal documentation. Manually coordinating the many types of documents and information that arrive from distributed locations provides the opportunity for problems.

When problems arise, customers often need answers that can only be found in a myriad of transaction documents. However, customers cannot afford to wait days - or even hours - for documents to be retrieved and a decision rendered. Thus, there is a high demand for the ability to service the customer in "real time".

Optika Solution

First, Solving the Paper Problem: Effectively managing the huge quantity of documents and transactions produced daily at hundreds of stores throughout the world can be overwhelming. Special expertise and technology are required to address the requirements unique to the retail industry, such as providing quick and easy access to documents, managing the influx of paper and producing timely results without requiring additional labor resources. Optika is the industry's first integrated software suite of imaging, document management, workflow and COLD that enables you to control and manage both the paper and labor-intensive processes associated with doing business today.

Optika's powerful image and document management software provides a flexible, scalable solution for organizing and managing complex collections of multiple types of documents within your enterprise, including credit card invoices, customer receipts, vendor contracts and bills of lading. Powerful tools enable you to capture, view, file, store, retrieve, share, print, fax and even route documents of virtually any format.

Second, Automating the Business Process: Optika's enterprise-wide workflow solution allows businesses to graphically design and manage work processes, controlling the flow of information and resources that are integral to retail transactions. Leveraging Optika's highly distributed architecture allows organizations to perform remote document capture and automatically route them to the appropriate location or person. This results in improved communications

between corporate headquarters and retail outlets. Optika also provides immediate access to critical information, eliminating the need for physical distribution and handling of paper documents across your organization. The result is better management of transaction information, which leads to enhanced productivity, increased responsiveness to customers and reduced total cost of ownership.

Third, Transitioning to a Web Infrastructure
Leveraging the infrastructure of the Web is mandatory for today's competitive retail organizations. For high-volume retail operations, leveraging Web technology can provide better customer service at a lower cost per transaction. While the Optika solution effectively manages your current paper-based processes, it also provides the necessary bridge to evolve your company to the electronic transaction processing of the future - at whatever pace you choose. Optika is the only solution provider that recognizes the requirements of retail organizations to handle both paper-based and Web commerce, and delivers the tools you need to get there.

Customer Profile

Payless Cashways, a national building materials retail chain, recently moved to

ROI

- Breakeven in less than twelve months
- \$200K savings in document storage costs
- 25% faster customer response time
- 15% improvement in prepaid reconciliation

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cut costs to survive an onslaught of competitive pressures and quickly reducing profit margins. Payless was forced to enhance its customer service and find a way to effectively manage the constant influx of paper documents. Installing the Optika integrated solution of imaging, document management, workflow and COLD saved Payless more than \$200,000 annually - dollars previously spent on microfilm and fiche conversion. Payless realized a complete return on investment on the system in less than one year.

Prior to implementing the Optika software, the daily scene at corporate headquarters was a proliferation of over 100,000 incoming paper documents, ranging from credit card invoices and bills of lading to vendor contracts and customer receipts. Payless was plagued by slow document retrieval, particularly when responding to invoice requests from vendors and field locations.

Optika's imaging and COLD solution made instant retrievals, and excellent service, the order of the day. With the imaging component, employees now scan 100,000 pages a day. Of those pages, 30,000 vendor invoices are automatically on-line within 24 hours. Requests from credit-granting companies are received via email and automatically fed to the imaging system; thus thousands of requests can now be processed every day.

Customer service response times have improved dramatically due to the ability to quickly locate and transmit documents; all transactions are now completed within 24 hours, as opposed to the 3-4 day response time prior to the Optika system. Ultimately, Payless will be extending the Optika solution to its entire retail supply chain via the Internet, including its stores, corporate headquarters, regional distribution centers and even vendors.



"With Optika's software, our customer service response time has gone from days to minutes."

Tim Thomas - Project Manager, Payless Cashways, Inc.

