

Kowalski's Market

Case Study



Gourmet grocer eliminates manual AP data entry, creating shared process ownership by using accounting automation software

Gourmet grocer, Kowalski's Markets, implemented DocuWare to manage accounting records. Not only did they streamline work processes, they were also able to improve cost analysis and vendor relations, as well as create a shared sense of ownership in the company and see employees thrive now that the burden of manual data entry has been eliminated.

Founded in 1983, Kowalski's Markets is an upscale gourmet market with 12 locations across the Twin Cities. The markets feature a variety of local, sustainable, all natural or organic products throughout the meat, seafood, deli and sushi, produce, bakery, artisan cheese, specialty grocery, dairy, frozen foods, wine and spirits, gifts and floral departments.

Kowalski's Market

Industry: Retail / Wholesale

Location: USA

Application: Accounts Payable / Accounts Receivable

Document Types: invoices



Requirements

As Kowalski's Markets grew and expanded, managing paper accounting records became very difficult. It took one corporate accounting employee 3-4 days a week to type the invoice information into the accounting system. Department managers were also typing the invoice information to compile a weekly report. To sum things up, manual processes were unnecessarily being done twice and were taking away from employees' core responsibilities.

The Tasks

- Eliminate manual process and free employees to focus on key tasks
- Streamline accounting workflow
- Position the company to manage growth

Solution

Kowalski's spoke with their trusted IT Vendor and Authorized DocuWare Partner who introduced them to DocuWare. The solution was piloted in the headquarters store for a few months, then rolled out to all 12 stores, one at a time, over the course of the next 3 months. Today invoices are scanned at each store and automatically indexed using DocuWare's Intelligent Indexing feature, which is an AI service that learns how to "recognize" index terms wherever they are on a page. Next, the invoices are electronically routed to the department head, who fixes any missing or incorrect index terms and reviews the costs. Using an electronic stamp, the invoice is routed to the corporate accounting office where it is given one final review before being stored in DocuWare.

Applied Modules

- [Autoindex](#)
- [DocuWare Import](#)
- [Intelligent Indexing](#)
- [Smart Connect](#)
- [Task Manager](#)

A tight integration between DocuWare and Kowalski's accounting solution, Sage, allows the accounting staff quick access to documents stored in DocuWare, right from within their familiar accounting program.

Benefits

Kowalski's has eliminated more than 40 hours a week in data entry time and their employees have more time to dedicate to the key part of their jobs.

The accounting department can instantly answer vendor questions about being short paid. One of the biggest benefits the accounting department has seen is that they no longer look up information for department managers as these managers now have searchable, self-serve access to important accounting information.

For Tony Olufson, the Accounting Manager, the biggest benefit is being able to instantly perform a cost analysis.

"Every month I do an income statement review. If I'm curious why expenses are high, I can easily run a report in the system to satisfy my curiosity and become instantly very aware of what we are spending. With DocuWare we ended up making our processes better and easier: the end result is that we catch things that would otherwise be too labor intensive to research. This kind of insight is invaluable to us," said Olufson. Vendor relations have been positively impacted now that answers are readily on hand and the company is able to take full advantage of early payment discounts.

The Benefits

- Eliminated manual data entry
- Improved monthly cost analysis
- Quick access to information improved vendor relations
- United employees creating a shared sense of ownership in company processes

When Kowalski's rolled out the solution, they discovered the upfront customer facing departments didn't understand

how much work the back end or accounting department was doing. "Giving our employees an overview of the entire workflow, united our team and made them all accountable. DocuWare helped us create a shared sense of ownership and gave everyone an understanding that they are an important part of the big picture," said Olufson.

Converting paper records to digital ones has eliminated 384 boxes of records a year that Kowalski's will no longer need to physically store.

Conclusion

DocuWare's impact can be felt on many different levels. "Our accounting team member, Michelle, is no longer spending hours on data entry. She's learned so many more skills and is doing beneficial work. Her value was being wasted. Now with DocuWare in place, she is thriving in her position. It has been exciting to watch her grow and gain leadership and accounting skills," said Olufson.



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Tony Olufson, Accounting Manager, Kowalski's Markets



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