

SUCCESS!

Industry	Financial Services
Critical Issue	Costly off-site storage and time wasted searching for and retrieving paper records.
Solution	Easy to deploy electronic document management and storage system with fast user adoption.
Result	Eliminated off-site storage costs and increased efficiency: slashed document retrieval from minutes to seconds.

Genesis Financial Solutions uses Document Locator to create a paperless office environment

Genesis Financial Solutions is a diversified consumer financial services business. The company buys and services consumer receivables. They also issue credit cards and originate other types of consumer loans. Since its inception in 2001, the entrepreneurial company has grown rapidly and currently has about 100 employees. Genesis takes pride in being able to respond quickly to changing market conditions.

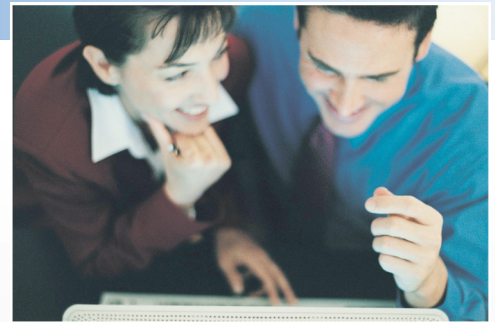
As a financial services company, Genesis is required to file and manage a lot of paper documents including checks, loan agreements, contracts, payment records, equipment titles, and bankruptcy documents. On a busy day they might need to file more than 2,000 documents. Like most businesses, Genesis initially stored its documents in file cabinets. It also used an off-site vendor to store older documents in order to comply with industry record retention laws and regulations.

The problem with paper records

With the onset of rapid growth, Genesis began to feel the impact of time lost in accessing records in their file cabinets. According to Susan Damery, it usually took them 10 minutes to go find the right file cabinet and pull a record. They also needed to return the record after referencing it. For documents stored off site, there could be a couple days of lag time between a request for the document and receipt. Off-site storage was also costing about \$800 per month.

The search for a solution

Large volumes coupled with limited onsite storage was making record-keeping very inefficient. That's when they discovered Document Locator. Kevin Noall, IT Manager for Genesis, evaluated Document Locator for compatibility with their needs. What he discovered was a system that was



“ Document Locator has improved customer service, reduced our cost, and helped us better comply with state and federal regulations. With the emphasis we place on responding to our customers and to the marketplace, this innovation gives us a critical and distinctive advantage in our industry. There is no substitute for having the right information at your fingertips.”

Irving Levin

CEO and Founder
Genesis Financial Services
Beaverton, Oregon

Microsoft
GOLD CERTIFIED
Partner

Seamless
Windows
Integration

very easy to install and deploy. “We were up and running the same day. I’m especially pleased at how easy it has been to train new users.”

The result: increased efficiency

Genesis is currently using Document Locator in three departments: Accounting, Customer Relations and Customer Collections. Each department has its own desktop scanner that can scan about 20

pages per minute. When they have large jobs they use a centrally-located, high-speed scanner that can handle up to 60 double-sided pages per minute. Genesis has been storing all new documents in Document Locator since they purchased the system. Recently, they began back-scanning the documents stored off-site in order to improve efficiency and eliminate the cost of storage. Kevin stated their

ROI has been quick. “We are now finding documents in seconds versus the 10 minutes it used to take to manually walk to the file cabinet, find a document and then return it.” Kevin added, “There used to be a lot of calls between departments to ask questions about a customer. Users can now find what they need faster in Document Locator.”