The solution, which is integrated into Sage X3 accounting system has allowed Liftasud to automate its purchasing and sales processes. The company, which specialises in heating, ventilation and air conditioning systems also uses on electronic signatures in this process.

LIFTAsud
LE SERVICE GAGNANT !

Julien Brunel, Managing Director of Liftasud based in Torcy,

values the company-wide digitisation of diverse documents, such as invoices, purchase orders, quotations and contracts, as well as the easy integration with Sage X3:

"DocuWare is a fantastic tool that has allowed us to digitally map our entire processes and get rid of the flood of paper. In total, over 650,000 documents have already been digitized using the DMS."

Location: France
Industry: Industry
Deployment: Cloud
Department: Company-wide
Integration: Sage X3

On its way to becoming a paperless company, air conditioning specialist Liftsaud has already digitized over 650,000 documents and automated its purchasing and sales processes with DocuWare Cloud.

Founded over 30 years ago, Liftasud distributes and installs heating, ventilating and air conditioning systems. With 70 employees and seven branches across France, the company has been engaged in digital transformation since 2018 and has opted to go completely paperless and consequently digitise all documents. The goal is, step by step, to reduce paper in all departments and optimise processes in sales, accounting and purchasing, as well as administration and distribution.

The project particularly includes customer and supplier invoices, quotations, customer inquiries and orders, invoice-related documents (waybills, return bills, credit bills) as well as contracts and applications for vehicle registrations.

All company processes are now 100% digital. From scanning paper documents, digital processing and import into Sage X3 to validation as part of digital workflows and signing delivery notes on tablets.

Liftasud is a pioneer in this field. Managing Director Julien Brunel explains: "After a short ramp-up period in 2019, DocuWare's solution was fully operational during the Corona virus pandemic. Our teams were able to use the tool from home, so that even at the height of the pandemic we could continue to work normally without interruption. This is all the more remarkable when you consider that we are based at several sites in France."

All requirements met

After a test phase with four different vendors, it was an easy decision to select DocuWare thanks to its high flexibility together with the various integration options, especially with the Sage X3 ERP system.

"DocuWare is the only software that was able to fully meet our internal requirements through its various interfaces and flexible deployment scenarios," adds Julien Brunel. "We wanted to be autonomous in configuring the solution as quickly as possible so we could evolve it according to our needs."

Following a pilot phase with four users, the entire workforce is now using DocuWare, and the solution has been very quickly adopted. The intelligent indexing, the lists that replace the old paper filing systems, and the smooth

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synchronization with the Sage X3 ERP system have been particularly well received. In total, more than 650,000 documents have already been digitized and archived.

Integration of international sites planned

Following a pilot phase with four users, the entire workforce is now using DocuWare, and the solution has been very quickly adopted. The Intelligent Indexing, the lists that replace the old paper filing systems, and the smooth synchronization with the Sage X3 ERP system have been particularly well received. In total, more than 650,000 documents have already been digitized and securely archived.

The smooth interaction between DocuWare and the ERP system, which provides a real-time view of order and warehouse status directly in DocuWare, is another key benefit. Liftasud's parent company is very satisfied with the solution and paperless

working. As a result, it's now planning to expand it to the group's international locations. It's an easy move to implement, as DocuWare is distributed in 100 countries and the software is available in 24 languages.

"One advantage of DocuWare is that we can easily configure the solution ourselves. That saves costs."

Discover more: start.docuware.com