# SaniTec



REFERENCE-STORY

# SaniTec: efficient digital archiving of sales documents

# content

# about SaniTec

If you have ever looked for an instantaneous water heater in a hardware store, a product from the SaniTec brand will most likely have helped you. The company from Lüneburg in the heart of Lower Saxony is Germany's leading expert in the sale of electric hot water appliances in hardware stores. As a highly specialized trading partner, SaniTec supplies more than 1200 DIY stores in Germany and Europe. The sales professionals have also developed a point of sale (PoS) that clearly informs end customers on site about the specifications of the various appliances from leading manufacturers. Whether bathroom, lavatory or kitchen, with heat pump or water storage tank – at the SaniTec PoS, customers can find the right solution for themselves.

# successful business model under the clage holding company



Just how well this business model works is demonstrated by the annual turnover of around 12 million euros that the 16-strong team generates each year. This is certainly made possible not least by the fact that SaniTec has a strong partner at its side. The company is part of Clage-Holding, also based in Lüneburg, which produces and sells its own hot water appliances under this brand. This is also how easy software found its way to SaniTec:

> *Especially with large invoices, when the management is involved, it should be possible to approve the invoice even if there is physical distance. For example, because the managing directors are traveling. Previously, in this case, the secretary had to send a fax, which was signed, returned and stapled together in the accounts department.*

# it solutions must be reliable

So says Carsten Edler, who has been responsible for IT at SaniTec for more than 30 years – in other words, everything to do with networks, software and digital work processes. As an old hand, Edler has already updated easy archive several times and moved the software to new hardware. As a rule, however, easy archive "works away in the basement without any problems and writes the data as it should be". Reliability is an important criterion for IT at SaniTec and its parent company Clage. All essential programs and data will remain on-premises for the foreseeable future and will be managed in-house: The operating system comes from Microsoft, the Enterprise Resource Planning (ERP) solution from Infor. In this context, easy archive is a "smooth, very maintenance-free" product for Edler, which SaniTec uses in sales together with easy capture, the OCR tool for digital document capture.

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# digital archiving of documents in sales

Specifically, SaniTec uses these easy products to archive receipts from sales partners – these are usually hardware stores, but can also be end customers in rare cases. To explain the challenge behind these use cases, Edler needs to expand a little. Specifically, there are currently two application scenarios for easy archive at SaniTec: returns and customer orders.

**Scenario 1:** The returns process

Returns are credit notes or debit notes that usually reach the SaniTec warehouse via a shipping service provider together with the returned devices. These documents may be in a very poor condition due to transportation. For example, because they are often creased and stapled or there is still water in the device that has softened the paper during transportation, causing the writing to run. After receipt of the goods, these documents are scanned, indexed and stored in digital form in the archive. The paper documents no longer need to be stored and can then be destroyed.

The advantage of easy archive for SaniTec in this process is that no resources are required for the physical archiving of documents. Later on, digital archiving pays off because it is very easy to find documents again using the search function in the archiving software.



*For example, it can happen that an electronic instantaneous water heater with a purchase value of 300 euros is supposed to have been returned, but after a brief search of the digitized documents, we see that we have actually only received a 5-litre storage tank with a purchase value of 50 euros.*

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**Scenario 2:** Picking lists for outgoing goods

The second scenario for the digital archiving solution is picking lists for outgoing goods. For this purpose, we record all customer orders in Sales, which are sent to the warehouse as picking lists in paper form. This is because the employees there prefer to have paper in their hands, as there are often too many items that make scrolling difficult on mobile devices. The picking lists contain information such as the number of items, the box size and the total weight.

The employee stamps the list and adds further details that cannot be taken from the IT system, such as who packed the order. Each list has a barcode that is scanned at the easy capture workstation. If an order is received by fax, it will be stored. The barcode is used to send a database query to the Infor ERP system, which reads and indexes the order data.

# nobody slows us down

In the future, IT manager Edler plans to convert further processes at SaniTec to digital archiving. An important reason for this decision is his colleagues, who are generally very interested in driving forward the digital transformation of archiving processes:

*For example, it can happen that an electronic instantaneous water heater with a purchase value of 300 euros is supposed to have been returned, but after a brief search of the digitized documents, we see that we have actually only received a 5-litre storage tank with a purchase value of 50 euros.*

# Future plans for digital transformation with easy

At the top of the to-do list is the digitalization of incoming invoice processing. SaniTec urgently needs to take action here, not least because of the upcoming mandatory switch to e-invoicing in the B2B sector in Germany from January 1, 2025, as its own systems will not yet be able to process the e-invoice formats such as X-Rechnung or ZUGFeRD. However, Edler is thinking bigger with this project right from the start:

*In the near future, all delivery bills, order confirmations, credit notes, etc. and all incoming invoices at SaniTec will be digitized and stored in easy archive in an audit-proof manner.*

When he tackles the project, he will definitely make use of easy's support:

*I can say from experience that this can be solved with easy archive and that easy has the right people to support me.*

At the same time, Edler also sees a lot of work ahead for the business partners:

*I think that around 95 percent of the documents that end up in our purchasing department via procurement are actually still in paper form.*

## Document storage — no way but the right way

Whether still on paper or already completely digital: document storage is a must for every company. On the one hand, legal regulations require documents to be stored for specific periods of time. On the other hand, the way in which documents are stored digitally has positive effects on collaboration within the company.

# the management actively supports the modernization of our processes. Despite initial additional costs for software and additional work for employees, we are consciously investing in these changes in order to continue to develop.

**Carsten Edler**
Leiter IT | SaniTec Produkthandel GmbH

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