

# DataView Case Study



WATER • WASTEWATER • STORMWATER  
**SOLUTIONS**

Everett J. Prescott, Inc. (EJP) was founded in 1955 in Gardiner, Maine as the first waterworks distributor north of Massachusetts offering water-main tapping and installation, and underground boring. EJP's first two branches, in Concord, New Hampshire, and Montpelier, Vermont opened in the 1970's.

Today, EJP offers the finest water, sewer, drain and gas products, backed by an exceptional level of professional service. The company employs more than 300 people across all of its businesses and distribution branches in all six New England states as well as New York, Indiana and Ohio.

EJP uses an enterprise distribution management software from Mincron® operating on an AS/400 midrange computer system from IBM®. Prior to installing the DataView system, the company had been using a paper-based Accounts Payable system. The manual filing system led to frequent discrepancies in PO and vendor invoicing, and these discrepancies meant wasted time reconciling differences, increased the work load for the finance team and late payments to vendors.



**Everett J. Prescott, Inc.**  
32 Prescott Street  
Gardiner, ME 04345

## **CHALLENGE:**

### **Inaccurate and Late Payments to Vendors**

Dan Willette, Chief Information Officer for EJ Prescott for the past 27 years said, "We needed to tighten up that aspect of the business. It was costing us too much time and too much money. We evaluated a document management solution from IBM and visited some field installations of it, including a large implementation at Lawrence Hospital in Lawrence, Massachusetts. While the solution looked promising, it turned out to be wicked expensive. We knew where we wanted to go and also that there would be a more cost-effective way of getting there."

## **SOLUTION:**

### **DataView Document Management System**

After installing the DataView Document Management System from CAI Software, EJ Prescott's situation improved dramatically. "We're able to do so much more — so much more easily — with DataView than we could have ever done with the IBM system. The product is reasonably priced and absolutely packed with the kind of features we wanted in an electronic invoicing archival and retrieval solution."

DataView specialists worked closely with the team at EJ Prescott to ensure that the system was seamlessly interfaced to the company's Mincron software. Today, EJ Prescott's DataView implementation seamlessly utilizes over 400,000 separate folders, containing more than 1.4 million individual documents.

*"DataView is an integral component of our centralized accounting system, and we know that it is instrumental in ensuring that invoices are paid on time and that we're much better equipped to answer questions promptly from our vendors and customers."*

**Dan Willette**  
Chief Information Officer  
EJ Prescott



*"We also know that our people in the field and at each division are able to devote significantly more time to inside sales and other tasks all with no change in head count."*

**Dan Willette**  
**Chief Information Officer**  
**EJ Prescott**

## About DataView

The DataView Document Management System makes it easy for customers to quickly store, search and access any type of electronic document. DataView is a unique enterprise archiving and retrieval system that provides document storage and management, electronic data delivery, bar-coding, forms processing and data entry on electronic forms. Globally, over 1,500 leading customers in the medical, manufacturing, utility and government agency industries rely on DataView for their document management needs.

For more information, visit [www.caisoft.com/dataview](http://www.caisoft.com/dataview).

© 2019 CAI Software, LLC. All other company or product names are trademarks or registered trademarks of their respective companies.

"The team at DataView is exceptional! Everyone we have dealt with has been a real straight-shooter and they've never misrepresented the product. Our rep, Chris, is one of the best people I've ever had the pleasure of working with. The few times there has been an issue, he does the right thing. These guys really know what's going on and what we're looking for."

Rules are set up to ensure the accuracy of vendor payments, and purchase order costs are automatically matched to the vendor's invoice amount. If there is a mismatch, an email is sent, with the invoice attached, to EJP staff at each company location where it can be adjusted before it is approved for payment.

"We couldn't be happier with the DataView solution," Willette added. "It gives us centralized payables for each division. As vendor invoices are received, we just enter the PO, hit a button to scrape, or read, the screen and convert the contents to an electronic document. From there, DataView locates the right folder in the system, automatically matches the right invoice to the right vendor and stores the file. It couldn't be easier!"

DataView is used extensively throughout EJ Prescott's operations. Accounts Payable uses the solution to store and index vendor invoices with backup documentation and receiving reports. The Accounts Receivable team uses DataView to view scanned Payments on Account, Credit Apps and references. In addition, all of the company's Fixed Assets are documented and stored, including information pertaining to vehicles, disposals and sales, and PEP Transportation records such as vendor invoices, fleet maintenance and driver-related documents.

"The ease at which we were able to move to the DataView solution was the beautiful part of it all."

Willette said, "DataView is an integral component of our centralized accounting system, and we know that it is instrumental in ensuring that invoices are paid on time and that we're much better equipped to answer questions promptly from our vendors and customers. We also know that our people in the field and at each division are able to devote significantly more time to inside sales and other tasks all with no change in head count."

EJ Prescott is looking to extend the capabilities of the DataView solution by implementing electronic workflows, a series of connected steps where documents, information or tasks are passed from one user to another for action, according to a set of rules. Workflows will allow various departments within EJP to establish consistent processes between users, enforce policies and procedures, create an automatic audit trail and archive documents and information after the process is complete.



**For more information,**  
**contact us at (603) 893-9090**  
**or [www.caisoft.com/dataview](http://www.caisoft.com/dataview).**

