



## Forgital USA Inc. Customer Success Story-Manufacturing

**Forgital USA Inc. is the North American distribution arm of Forgital Group, a worldwide leader in the design, engineering and manufacturing of custom-rolled rings for industries spanning power generation; oil and gas; mining; construction; and, aerospace.** Forgital's Houston office has 26 employees serving 100 customer accounts including Komatsu; Caterpillar; General Electric Locomotives and Wind Turbines; Vetco; Cooper Cameron; Chevron; Jet Products and Smith West. Each account requires an exorbitant amount of transactional documentation including order confirmations, packing slips, bills of lading, invoices, proof of delivery, receiving documents and Material Test Reports (MTRs).

Adding more complexity to Forgital's day-to-day operations are stringent industry documentation and storage regulations including ISO 9000 quality standards, which require businesses to retain copies of all customer files. Within no time, the amount of customer documentation rapidly exceeded Forgital's physical storage space and the company found its offices buried in file cabinets. To make matters worse, when a customer would request documentation, it often took hours, even days, for Forgital to find the information within its vast, and disorganized filing system. In some cases, employees had to request the files from Forgital's freight companies or European manufacturing facilities, which resulted in more delays and duplicate files that further taxed physical storage capacity.

***"Questys Enterprise is the best solution for our business. It is so easy to use and has eliminated the stress associated with spending hours searching for requested customer documentation. Any business that must retain and manage a vast amount of important documentation should consider this solution."***

John J. Fisher,  
Controller, Forgital USA Inc.

Realizing the need to replace its paper-driven, labor-intensive document management processes, Forgital approached Stargel Office Solutions, one of the Southwest's largest authorized dealers for Toshiba copiers, facsimiles and printing products. Tyson Stargel, software solutions manager at Stargel, recommended using Questys® Enterprise document management software. "With Questys, we were able to realize an immediate increase in employee productivity," said John J. Fisher, Controller, Forgital USA Inc. "We were also pleased that Questys Enterprise was able to integrate with our existing NxTrend Sx-Enterprise Enterprise Resource Planning (ERP) software and Toshiba 3511 copier system. This saved us money and time by eliminating the need to purchase costly hardware and software to support the new document management system."

Questys Enterprise helped Forgital solve its document management and retention woes by creating a searchable, electronic repository for customer documentation. "In one of our most embarrassing cases, we had to pay a customer's machine shop to find the documents we needed. Questys Enterprise now makes it possible to access and send important documents to our customers within minutes," said Fisher.

With Questys Enterprise, Forgital can now scan all customer documentation using its Toshiba copier system and send it directly to Sx-Enterprise, or to the company's E-mail program. By storing documents electronically, files are retrieved instantly and sent to customers upon request. This not only increases employee productivity by freeing up valuable human resources to focus on other projects, but it also reduces physical storage requirements, and saves money that was previously spent on file cabinets, folders and copier paper. Questys Enterprise also made it easier and more cost-effective for Forgital to maintain its ISO 9000 certification and compliance with other industry regulations.

### Overview:

#### COMPANY

Forgital USA Inc.

#### HEADQUARTERS

Houston, TX

#### INDUSTRY

Manufacturing

#### NO. OF EMPLOYEES

26

#### BUSINESS CHALLENGE

Paper-intensive customer documentation procedures burden physical storage capacity; haphazard filing procedures reduce employee productivity.

#### SOLUTION

Questys Enterprise: An affordable, easy-to-use and flexible document management solution that eases the process of storing and retrieving customer files.

#### RESULTS

- Time spent researching for customer documentation reduced from days to minutes
- Searchable database enables quick response to customer requests
- Improved employee productivity and efficiency
- Reduced physical storage requirements

