Plus TECHNOLOGIES

A Division of Digital Controls

Plus Technologies has been streamlining document driven business processes with output management software solutions since 1995. They have thousands of customers in over 35 countries around the world.

C a s e S t u d y

Distribution of Invoices via E-mail Reduces Collection Times and Improves Customer Service

PLUS TECHNOLOGIES CASE STUDY SERIES

This series of case studies will discuss the advantages of modern document delivery/administration methods over the old traditional print job methods.

Utilizing modern document delivery methods, print jobs or applicable parts of the jobs can be delivered to the correct locations, people, web sites, faxes, emails or printers. Modern document delivery methods provide user-friendly interfaces that assist getting jobs where they need to be, when they need to be there.

This technology saves time, network resources, consumables and training. If there is problem along the way, it can be tracked down to a place, time, printer and page so it can be resolved quickly. This technology provides confirmation of job delivery and more importantly job completion.

Where appropriate jobs can also be encrypted which ensures security of the information.

In this case study, we will explore how a global provider of innovative solutions to builders and operators of military and civil aircraft and engines easily modified the distribution of their invoices from a hard copy, print and mail model to an electronic copy, distribute via e-mail or fax model. This new process significantly reduced collection times and improved customer service and satisfaction.

Company – This Company is the leading transatlantic aerospace equipment company, with more than 9,000 staff and $1.6 billion in revenue split between Europe and North America. The Company holds key positions in the supply chains on all major military and civil aircraft and engine manufacturers supplying integrated solutions. Their businesses focus on electronics and mechanical systems, engine components and customer services.

Business Problem – Every month, this company creates, prints, and mails over 8,500 invoices for the goods and services they provide their customers. The legacy Oracle application, running on HP-UX servers, that creates these invoices is not scheduled to be replaced for two to three years. However, they needed to address problems with their invoice print and distribute model in the short term because collections were moving out and customer service was suffering from the inflexibility of their invoice distribution and re-printing operation.

The problem faced by this company would appear any time that a customer who had not paid their invoice was contacted by accounts receivable and the customer needed a new copy of the invoice in question. The invoice may have been mailed to the wrong accounts payable location, misplaced by a clerk or missing for any number of other reasons. In order for the invoice to be re-printed, the entire batch run that invoice fell into had to be re-run. The invoices would be generated and the text would be merged with an electronic

form and finally, a single file would be generated by the electronic forms package and sent to the printer as PCL (printer control language) code for printing. Because this file is already in PCL it cannot be broken up and selective pages be printed by any tool that the customer had in place. Once the whole invoice batch printed, the accounts receivable person would find the invoice they needed, discard all the other invoices and mail the invoice copy to the customer. An invoice batch run may include as many as 1,200 invoices, 1,199 of which would be thrown away after printing.

This time consuming and expensive process negatively impacted collections because the time it took to re-print a specific invoice was significant. The process took up a large amount of accounts receivable personnel's time and further delayed the collection of unpaid invoices even longer. Finally, many customers became frustrated by the company's inability to quickly produce an invoice for them to pay, resulting in reductions in customer satisfaction.

Technical Solution – The customer decided to utilize a middleware solution rather than modifying the underlying business application. They felt that a middleware solution would be much more cost effective and they did not want to modify the old, legacy application for fear of causing other problems in a stable application. The middleware solution that they chose to implement was built with OM Plus from Plus Technologies.

OM Plus now receives the invoice batch runs from the legacy application just as if it were a printer. At that point, OM Plus reads through the print job and creates an individual document for each invoice number in the batch. Each document is named for easy lookup as `CustomerName_InvoiceNumber_InvoiceDate.` Once this electronic bursting is finished, OM Plus calls the electronic form to be applied to each invoice. At this point, the document is ready for printing. OM Plus performs another lookup to determine what the customer's preferred delivery method is. By customer number on the invoice, OM Plus determines whether the invoice should be printed and mailed, faxed or e-mailed. If an invoice is to be printed and mailed, that is done now. **Note:** If an invoice is to be e-mailed or faxed that is completed after the next step.

Every invoice, regardless of initial delivery method, continues from the previous step and is converted to an Adobe PDF file and sent to a file server. Once it is in this final stage, the invoices that need to be e-mailed are e-mailed and those customers who asked for their invoices to be faxed get there invoices over their fax line.

With this solution in place, customers receive their initial copy of an invoice in the desired format and any time a customer requests another copy of their invoice, the accounts receivable staff can quickly look it up and easily re-print it, e-mail it or fax it to the customer.

This document delivery solution has greatly improved the company's accounts receivable, improved operational efficiency (invoices used to take up to 12 hours per batch run, and now are processed in less than one hour) and provided a much more robust level of customer care because invoices are so easily "re-delivered" when requested by a customer.

Implementation – On site services including installation, system configuration, testing and user training were delivered by service engineers from Plus Technologies. In this case, the implementation was completed and in production within two to three weeks of the order. As is the case with many implementations of our products, the customer requirements for handling of the print jobs and the processes associated with managing the print jobs evolved during the implementation. Due to the extremely flexible nature of OM Plus' configurability, our service engineers were able to address additional print job management challenges quickly.

Plus Technologies Case Studies- The Plus Technologies case study series includes real examples of how companies use Advanced Document Delivery and Print Spooling Solutions to streamline operations, reduce cost and/or add functionality to existing business processes. For more information on these case studies, contact Plus Technologies.

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See Diagram on Next Page

= Invoice Batch Run

= Electronic Invoice Delivery

= Printed Invoice

Legacy Oracle Application

OM Plus OUTPUT MANAGEMENT

"Advanced print spooling and post-spooling functionality"

Step 1: OM Plus bursts the invoice batch run into individual files by invoice number

Step 2: OM Plus calls the electronic form for invoices and it is applied to each invoice file

Step 3: OM Plus looks up the customer name to determine if they want a printed copy of the invoice—if yes it is printed now

Step 4: OM Plus calls for PCL to PDF conversion. All invoices sent as PDF files to file server for e-mailing, or faxing and archival

File Server/Invoice Repository

E-mail

Fax

Re-prints

OM Plus

How it works:

- OM Plus receives the batch runs of invoices
- OM Plus bursts the batch into individual files by invoice #
- OM Plus calls the electronic form to be applied to invoices
- OM Plus looks up customer name to determine if they want a printed copy of invoice
- OM Plus sends invoices to printer per customer request
- OM Plus calls for PCL to PDF conversion of all invoices
- OM Plus sends all invoices as PDF files to file server for e-mail and fax delivery
- All invoices stored on file server regardless of delivery method
- Any invoice easily "re-delivered" via e-mail, fax or printed