

Order Processing with PlanetPress® Connect

This Objectif Lune customer prefers not to be named.

ABOUT THE COMPANY

Based in the UK, this company provides construction services and manufactures building products. Since its establishment in 1830, the company has grown to become the largest independent supplier of building materials, with 14 offices across the UK.

Region: United Kingdom

Industry: Construction

Size: 14 offices

Identifying the Opportunity

All of the company's business-critical documents were processed, signed and edited by hand. They were handling about 114,000 invoices a year. Orders often needed to be changed five or six times before the customer's delivery could be processed and an invoice could be issued. Both orders and invoices were physical, which meant that they had to locate, amend and re-file both documents every time a change was made. Next, in order to maintain an effective audit trail, they had to manually scan the documents to be placed on file in DocuWare, their document management system.

All invoices and credit notes were being sent by regular mail, as they were not set up for e-invoicing or e-delivery. Using mail was an expensive option, with the average cost of sending a single piece of mail being 39 pence (51 cents in USD). The company was sending over 80,000 pieces of mail a year. This was also a time-consuming process, as outbound mail needed to be processed manually (printing, folding, inserting, franking were all done on a daily basis).

Document Integrity

Although the cost was a concern, there was also a concern about the integrity of the documents. There was no way to check that the right document was sent to the right person, often leading to customers not receiving invoices and cash flow being affected.

Delivery notes were printed on old dot matrix printers, and signed copies were returned to the office that had shipped the goods. However, Head Office was in charge of credit control, so sending the customer a copy of the delivery note to ensure prompt payment was a challenge and could take up to four weeks. If copies couldn't be provided, this could mean payment couldn't be collected from the customer.



Before

THE ISSUES

- It took employees up to **4 weeks** to receive a copy of the delivery note, affecting the order-to-cash cycle
- Lack of connectivity with DocuWare affected audits
- Business-critical transactional documents were not centrally visible across the **14 sites**
- Customers often either didn't receive their delivery, or it was late
- The company still depended on regular mail as a way of communicating with customers and it was expensive

The Solution

The first step was to improve document visibility across the 14 sites. By implementing PlanetPress Connect, they could easily connect to DocuWare. Using the DocuWare plugin, unsigned documents were first sent to DocuWare. Once a document was signed and scanned, it was automatically sent to DocuWare to be matched with the unsigned document. Central visibility was no longer an issue and any exceptions or unreturned delivery notes could be highlighted.

Invoicing & Document Processes

The company also wanted to improve its invoicing process and move to e-invoicing. This was critical to the company as Accounts Receivable operated out of Head Office. With PlanetPress Connect's automation capabilities, an invoice could be generated automatically once DocuWare had received the signed delivery note. This greatly improved the company's order-to-cash cycle. By removing the manual process, the solution also ensured that the right invoice was sent to the right person, also improving the payment cycle.

By digitizing its document processes, the company became more efficient. The amount of time from order to delivery was significantly reduced. Departments were no longer waiting for revised documentation before processing orders and invoices. Orders that were processed and delivered were now accurate and on time. The company could effectively process more orders because its staff had more time.

After

THE BENEFITS

- 115 weeks** in man hours per annum was gained by removing manual processes
- Customers received their orders on time, which increased repeat business for the company
- £41,000 pounds** was saved annually on postage alone
- They could easily connect with DocuWare
- Their order-to-cash cycle was improved
- A full document audit trail was available, ensuring they met compliance specifications