Case Study #18

Access to customer invoices reduced from 10 Minutes to 2 Seconds

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Problem:

Curtiss1000 is one of the country's largest printing and printing services companies and employs a number of state of the art servers and IT systems including PeopleSoft to handle their accounting and day to day transactions. Every time a customer or sales consultant wanted a copy of an order invoice an employee in the billing and accounting department had to stop what they were doing and spend 5 to 10 minutes time finding, preparing, printing and sending an invoice to the requestor. It was even worse before upgrading to their PeopleSoft system. Then, they had to manually obtain the invoice from the file cabinets. Their current application produces a single large PDF each day. Unfortunately for reprints and copies, the system could not burst the report and get specific information for a particular client or invoice. Accounting had to rerun a report for that account so that the requested output could be reproduced and copied for the client. With up to 15 requests per day for each staff member, the interruptions, the amount additional manpower, and the increased processing load on their servers had become quite costly and a big "pain-in-the-neck" by the billing and accounting department.

Solution:

Using the GUI based front end forms designer of OctoTools™ , Curtis1000 recreated their invoice forms electronically. With OctoTool's run time engine (RTE) they then assigned variables for bursting on invoice number, file naming, and web addressing from within their report data. At the end of each day they ran a report and automatically stored the generated PDFs of the day's invoices. Now when a request comes in, they just look it up on-line and email/print or fax a copy to the requestor, thus taking only 2 to 5 seconds of their time. The project was conceived on Friday and by the following Tuesday they were into full production, including the designed invoice form. Not only did they see hours of savings each day, but the load on the PeopleSoft server was reduced significantly.

Typical Applications:
- Financial Data (AR, AP, Payroll, Customer Account Statements)
- Unattended Directory/File Name Management
- Archiving
- Electronic Document Disbursement

Products Required:
OctoTools™

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