



# IntelliChief Case Study: Manufacturer Removes Paper From Order-to-Cash Process, Simplifies Multi-Department Workflow, Enhances Profitability

**COMPANY:** A.T. Cross Company

**ERP:** Infor

## THE PAPER CHALLENGE

Prior to implementing IntelliChief, Infor ERP user A.T. Cross Company, an international manufacturer of fine writing instruments, timepieces and personal accessories, had a document management solution in place to manage order related documents. However, the system was outdated, and presented challenges to the businesses' users. All documents (orders, approvals, email messages, etc.) had to be printed and filed, then sent to a central scanning facility, where they were imported twice a week. This meant that some documents were not accessible for days, and with the average order packet containing 10-30 pages of information, this batch process often held up their sales process.

"We went from scanning every single document, email, invoice, and such, to barely scanning anything at all. In fact, IntelliChief has saved us noticeably considerable time and cost in scanning documents alone." -Deborah Dickie, Customer Service Manager

Once documents had been scanned, users could access them electronically. However, this too proved to be cumbersome, as users could only view one page at a time from each transaction. Users had to scroll through page after page, looking for the pertinent file they sought. This was the standard practice for most of their departments.

Business Gifts, an A.T. Cross line of business, had even more paper to track. For every order, they had the standard order packet, as well as a quote and proof packet. It contained all the documentation around the customer's order specs, approvals and the formal quote. Often, a proof process would not result in an order. Other times, one proof process might be tied to several recurring orders. Tracking the relationship between proofs and orders was critical business practices, and to providing their customers a repeat order-enticing experience. However, to accomplish this, proof packets were printed from the existing document management system, and rescanned so they could be associated to each new order. This proved problematic - there was no way to associate multiple orders with a single proof.

International orders presented their own unique issues. They were commonly received in groups from a distributor, with several orders in a single email. As the order was completed, an entire set of export documentation had to be created from an external export documentation software, including Shippers Letters of Instruction, Shippers Export Declarations and Commercial Invoices. These were generated on a shipment level, meaning that one set of documents covered multiple invoice transactions. The entire International process

was so complex and paper intensive, A.T. Cross did not even attempt to utilize their existing system, instead manually processing and filing these orders.

Behind all this paper was a monthly audit process, requiring various sets of documents to be presented to the auditor on demand. These audits led to retention of duplicate files, and required internal resources to divert their time from processing orders, to assist in the audit process.

## RESULTS

With IntelliChief's automated document capture, lifecycle management and multi-departmental workflow, much of the physical scanning was eliminated. Key business documents that were generated from A.T. Cross' Infor ERP system, such as order acknowledgments and invoices were automatically captured and emailed, without ever being printed. Electronic documents such as email correspondence, PDF, Word and Excel files were captured without having to print and scan, and inbound email orders were automatically captured. "We went from scanning every single document, email, invoice, to barely scanning anything at all. In fact, IntelliChief has saved us noticeably considerable time in scanning documents alone," commented Deborah Dickie, Customer Service Manager. Once the documents are in the system, Deborah's team can look up a transaction, and see thumbnail images for every correlating document, allowing them to access information easily and efficiently.

Email from international distributors are now automatically captured, using IntelliChief's Email Monitoring module. These orders are routed to the International Team, where each invoice can be split apart, and routed to the correct representative. When shipped, the export documents are captured to IntelliChief electronically, and linked to the appropriate invoices. This allows access to the export documents from any specific invoice, or allows access to all relevant invoices from a specific order packet. The only documents that needed to be scanned were the documents that arrived from the customer with a return.

With all documents stored in IntelliChief having full audit trails, lifecycle management, and granular security policies, financial audits have become much easier as well. All audit inquiries can be resolved by looking up an invoice in IntelliChief. With another click, the entire transaction history can be seen. Everything from artwork proofs, to customer POs, email conversations, invoices and export documents can be produced for an auditor.

## THE FUTURE

During the final stages of the evaluation process, the Accounts Payable group was brought in to see the capabilities of IntelliChief. The group

was so excited to get started, they asked to be implemented before their Customer Service department. While the order-to-cash process was ultimately the first area to be implemented, Accounts Payable is not far behind, with Customer Service and Human Resources on-deck.

"Next on the roadmap is our purchase-to-pay process. Accounts Payable is enamored with the idea that 3-way matching can be automated, and that they can gain better visibility to the invoice approval process." -Richard Coute, Manager, Operations and ERP Systems

### Contact Us Today

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