The Workflow Platform for RightFax
Case Study

The Compay

This global medical optics company provides vision technologies and support to help eye care professionals deliver optimal vision and lifestyle experiences to patients of all ages. With products ranging from eye drops to Lasik surgery devices, they are a global organization with an extensive support network that handles orders from eye care professionals, distributors and retailers. This medical optics company needed a faster and more responsive process to handle orders that arrived via fax. The existing manual review process was unsustainable.

The Challenge

A manual review process was used among several account management team members to distribute fax orders by territory, time zone and national account, for subsequent data entry and processing into SAP by assigned account managers. These orders mainly pertained to intraocular lenses used in cataract surgery.

One RightFax account was used and delegated in FaxUtil to be shared between many overlapping users. Tasks were distributed and tracked using a nested folder structure with manual indexing. Customer Service Representatives (GSRs) had to identify fax orders, find the corresponding customer account data in SAP, add account details to the fax record, and then forward all of this information by email to account manager teams by territories or named accounts. Emails to account managers had to be created with all the account data, so this involved more data entry, and since tasks were very dependent on manual tasks, there was no error free way within FaxUtil to verify that orders were sent by email.

Problems with their manual routing:

❱ Manual identification and routing of fax orders required substantial labor burden coupled with overtime costs. This resulted in order processing delays that impacted SLA's.

❱ Tedious and repetitive work led to low staff morale and higher turn-over. Skilled labor was being required to do unskilled tasks.

❱ Faxes required manual handling from too many GSRs. Orders were often delayed or missed, improperly categorized, believed to be processed, not expedited to the proper account manager or team, or improperly delegated to account managers that had already left for the day.

❱ Emails came with duplicated fax orders.

❱ FaxUtil and Outlook are not workflow clients. Involving multiple users and brute force event management is very inefficient and burdensome.

❱ Changes and manual operations in FaxUtil still do not perform automated post-processing tasks or back end integration, leading to even more labor burden and errors.

❱ There was no easy way to track and report on daily fax traffic and SLA's, and it was impossible to reconcile outstanding orders within SAP.

To sum it all up, the RightFax server and Outlook client applications that the company had in place were not designed for managing or tracking a business process shared by several users.

Solution:
Implementing the Workflow Platform for RightFax to help automate order processing

The medical optics company needed to expedite their fax order process with less manual labor. A key requirement was to use the existing RightFax environment. The customer support manager decided to leverage the native RightFax integration and workflow capabilities of the Workflow Platform for RightFax.

RightFax continues to receive inbound fax orders; however, the Workflow Platform for RightFax automation leverages both the Caller ID (ANI) and CSID information to uniquely identify fax events associated with SAP customer account information via a database lookup. Faxes are automatically monitored, categorized, and indexed, then within seconds routed by email to account management teams with detailed customer information included.

A user interface is provided to "fingerprint" faxes for the first time, based on associating the fax to a unique ANI/CSID matching pair, and comparing those to the lookup database. A web interface is also available to manage the lookup database. Any subsequent faxes from the same originator are automatically pre-indexed with all relevant customer data, and then immediately routed to the territory manager(s) with an email subject and body containing all the account data needed from SAP account records.

In addition, a PDF attachment is provided with a friendly and consistent file name for easy tracking and file saving, such as by account name, account number, territory and order date/time. In addition, archive copies of orders can be automatically pushed to content management systems and/or file servers. This is valuable for better HIPAA compliance and future customer service requests.

Over a short period of time the system becomes more efficient with mostly repeat customers, as the ANI/CSID matching pairs will have a higher percentage of matches. In addition, when faxes do not have a match and fingerprinted for the first time in the workflow interface, the downstream processes are still performed to index, organize and route the documents to the territory managers. All fax traffic is tracked and organized for reporting purposes both in FaxUtil and the workflow interface, complete with account data in FaxUtil folders, columns and history records.

If there is no ANI/CSID match and there is no account in SAP (because it is a brand new customer), the order can still be automatically delivered to the proper territory using the area code data from the ANI, or placed in the exception queue for hands-on account identification.

> Every fax order is now organized using a process specific folder structure within the RightFax FaxUtil, with an auditable event history and updated columns of account data. As RightFax is a company standard, having workflow events fully synchronized with the FaxUtil interface is very beneficial.

> Original events and history are maintained in RightFax for security, future access and policy enforcement with RightFax best practices.

> They now have the option to automatically output transaction information for business intelligence, or archiving into back-end repositories.

> As an option, an audit report can be written for all events by day, territory, account data, and so forth, to ensure all traffic and exceptions are accounted for. The audit report can also be made available via a web interface to the database(s).

Results & Benefits:
Better efficiency leads to satisfied customers

Within just weeks, a majority of orders were being delivered automatically with complete account detail to the CSRs. It is now easy to locate and organize faxes for specific customers and regions, and the CSR always has immediate visibility for daily customer orders. CSR's can even locate inbound fax orders by account with FaxUtil, since account data is populated. Another very important benefit is that CSRs are now able spend significantly more time on customer facing issues. They are no longer rushing through procedures, and orders are processed more quickly with less human error.

❯ Improved Customer Fulfillment
The integration of RightFax with the Workflow Platform for RightFax has dramatically reduced front-end labor burden, has helped prevent lost orders, and has improved fulfillment.

❯ Faster Processing
Customer was able to automate, streamline and expedite fax order processes and reduce processing time by over 80%. A 10 person department processes all of the orders in 2 hours each day instead of 11 hours. The team can focus more effort on customer service and business growth, and retain valuable employees.

❯ Leverage existing IT Infrastructure
There was no need to "rip and replace." Customer was able to significantly reduce costs by leveraging and building upon their SAP data, and the RightFax FaxUtil and Outlook interfaces, without stressing those environments.

❯ Quick Flexible Integration
The medical optics company particularly liked that they were able to easily automate their order workflow and integration processes without any programming. The support manager has been very pleased that the integration was "quick, flexible and able to evolve with changing environments", and at a lower cost than other options that they had considered.

The head of the Customer Service Department stated "we accomplished our goal of improving our sales processes by drastically reducing the time required to handle fax orders; our department is able to spend more time on customer facing activities that were key to increasing our bottom line revenue."

Advantage Technologies

Advantage Technologies
575 Lexington Ave.
Suite 12-110
New York, NY 10022
866-730-1700
info@atechnologies.com
www.atechnologies.com

Advantage Technologies has been providing on-premise and cloud-based enterprise fax and automated electronic document delivery solutions for over 20 years. Our team has completed thousands of successful system deployments worldwide in such industries as finance, insurance, banking, government, manufacturing, transportation, and healthcare.

Our North American helpdesk and sales team are certified on OpenText RightFax, Alchemy, RightFax Connect, Secure Mail, Secure MFT, Brooktrout fax boards and FoIP software, Dialogic Media Gateways, Sonus Fax Gateways, and cloud-based fax solutions. Advantage Technologies is a leading OpenText Platinum Partner and Authorized Support Partner (ASP).

Throughout our partnership with OpenText, Advantage has been recognized as RightFax Partner of the Year, IX Partner of the Year, and an IX Partner Leader.

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