

**Business Process Sample – as used by existing Create!form customers**

**Process – Pick Slip, Pack Slip, Labels**

**Customer: US Based distribution company**

The Process

Pick slips are generated through their ERP system. These are done either “on demand” or via a scheduled job that runs every 10 minutes. Create!form receives the pick slip and:

- ✱ Sends the pick slip to one of three Pick printers in the warehouse. Which printer should receive the pick is based on the location information from the pick slip.
- ✱ The pick is printed from one of three trays in each of the printers – depending on the items on the order (this is stored in a separate table and obtained by Create!form via an ODBC lookup). The paper in each tray is colour coded to make identification to the picking staff easier.
- ✱ Each Pick Slip includes three Bar code labels for the shipment, which are applied to the shipping boxes. Formatting applies a sophisticated look to the pick slips.
- ✱ If the pick slip is for a direct shipment to the end customer, the branding on the pick slip reflects that of the customer, not the Create!form user company.
- ✱ If the customer has signed up for pick confirmation, an email or fax is automatically generated and sent to the customer – including a copy of the pick slip itself.
- ✱ Some of the products being picked are “private label” (PL) – they are for direct shipment to the end customer and must have branding that makes both the product and the documents look like they came from XSE’s customer directly.
  - Only the lines on the pick that are coded for PL are split out for this process.
  - Each order line that is PL generates a separate Bar Code label print stream.
  - The Bar Code label can print on one of three label printers depending on the type of product being shipped – this information is retrieved by an ODBC lookup within Create!form. One of the printers is a colour label printers, the other two are thermal transfer black and white printers.
  - The appropriate number of labels is generated based on the quantity ordered.

The Benefits

- ✱ The customer has reduced the time spent by the shipping manager by 30% in sorting and assigning the pick slips for picking.
- ✱ The pick process is streamlined, automated and much more accurate – errors have virtually disappeared. No human intervention is required.
- ✱ Customers receive notification of the order being picked and of the shipment – in a 24 hour turnaround industry such as theirs, this is a critical customer service component.
- ✱ The customer has gained a competitive advantage through the Private Label process.



**Business Process Sample – as used by existing Create!form customers**

**Process – Invoice printing and delivery**

**Customer: US Based distribution company**

The Process

Invoices are printed from the ERP engine at the end of the day as usual. The invoice print run is sent automatically to Create!form. The process is then:

- ✳ Each invoice is inspected for the customer information. Certain customers have the choice of receiving daily, weekly or monthly summary invoices – all other customers receive an invoice for each order placed.
- ✳ Invoices that are for the regular customers are generated with the default Create!form invoice project, and then printed, faxed or emailed automatically. Invoices for summary daily, weekly or monthly customers are generated and put into electronic temporary storage.
- ✳ On a scheduled basis, the daily, weekly and monthly summary invoices are consolidated using a summary format invoice project. These summary invoices show many of the same details as the regular invoice, but in a more summarized format.
- ✳ The summary invoices are either printed, or sent via email or fax based on the customer preferences. This is done automatically via Create!form. The customer can specify up to 10 email addresses and 5 fax numbers that should receive the invoice.
- ✳ Emails are dynamic – the subject line and the body of the email are built using data from the document itself. The From address is picked up dynamically from the output.
- ✳ Faxes – Dynamically generated cover page includes the Remit To Name and the Email address for questions.
- ✳ Invoices – colour logo is applied automatically, and the “Remit To” address changes based on the customer.
- ✳ Invoices that do not need to get sent to the customer are automatically kept from printing by Create!form – for deliveries such as warranty claims and refills.

The Benefits

- ✳ Printing and postage savings for the 30% of customers that signed up for electronic delivery of invoices within the first month will save about \$30,000 a year in printing and mailing costs – from about 250 invoices per day being delivered electronically.
- ✳ The Create!form customer can offer their large customers invoice cycles and delivery methods that are the customer’s choosing.
- ✳ Adding customers to the summary and/or electronic delivery process is as simple as setting a flag on the customer record and assigning the delivery email addresses and/or fax numbers – the rest is automatic.



**Business Process Sample – as used by existing Create!form customers**

**Process – Financial reporting generation and distribution**

**Customer: Canadian higher education institution**

The Process

Financial statements for each month are generated out of the ERP engine. These statements are run by department; there are about 9 that are generated each month. These would include Comparison to Budget, Comparison to Prior Year, Grants Summary and others.

The statements are sent automatically to the Create!form server, and the subsequent processing is then done by Create!form:

- ✳ Each full financial report is burst by the person responsible (department head) and put into electronic temporary storage.
- ✳ After the last financial report is run, the Create!form process takes over and reverses the process – each individual report for each department head is consolidated into a single combined report. The appropriate formatting is applied to each report within the package. The end result is a single consolidated PDF format report.
- ✳ The consolidated report is delivered automatically to the department head via email, and a copy is also delivered via email to the appropriate Director for each of the departments. The email address to use for the department head and the Director is retrieved automatically by Create!form from user managed tables in the ERP system.

The Benefits

- ✳ The process is now entirely automated and “untouched by human hands” – a significant improvement over the prior process. Before introducing Create!form into the business process, the reports were burst and bound individually by hand, and then delivered by internal mail to the departments and directors – a very labour intensive process.
- ✳ The reports are delivered to the appropriate staff much more quickly than was previously possible – providing faster review and analysis.

Other Create!form uses at the customer:

- ✳ Accounts Payable Cheques (with MICR Printing and auto signature)
- ✳ Accounts Receivable Statements (with email delivery internally, and contact person automatically applied based on the data)
- ✳ Purchase Orders (with email delivery internally and externally, and terms and conditions printed duplex on back)



**Business Process Sample – as used by existing Create!form customers**

**Process – Accounts Payable Cheque processing**

**Customer: Canadian leasing company**

The Process

The customer creates Accounts Payable cheques for 3 different banks, in 2 currencies, and with a total of 18 different actual bank accounts. Managing the output as banking arrangements changed was tedious and time consuming. Trying to use the ERP engine to accommodate the needed output was extremely difficult. The alternative of having separate MICR coded stock for each bank account would have been expensive and made the printing process much more onerous.

Create!form was used to create a single consolidated output project for the cheques. The cheques are generated in the ERP engine and passed automatically to the Create!form server. Create!form then:

- ✱ Inspects each cheque in the run for the appropriate bank and company data.
- ✱ Applies the appropriate MICR line, bank address, CPA 006 compliant formatting, company address and legal information, currency information and voiding (for overflow cheques).
- ✱ Prints a plain paper copy of the cheque for internal purposes on a regular laser printer – without the MICR line in MICR format (regular font) and with the appropriate VOID and Internal Copy watermark information. Printing the internal copy on plain paper also allows the customer to use the entire stub for printing – saving on the number of cheques that need to print.

The Benefits

- ✱ A single output format is needed for all cheques – and adapting for new banking arrangements is much simpler.
- ✱ The number of different cheque stocks required is down dramatically – saving money and time.
- ✱ Printing more on each cheque means less wasted cheques.
- ✱ Programmatic changes to handle the 18 different accounts was virtually eliminated – saving up front time and aggravation when performing ERP upgrades.

**Business Process Sample – as used by existing Create!form customers**

**Process – Purchase Order processing and distribution**

**Customer: Canadian natural resources company**

The Process

The customer operates mines in a number of different locations across North and South America. Purchase Orders are generated by the local staff and needed to be routed via fax, email or print as appropriate. When entering the order, the ERP engine gives the user the option to select any combination of printing, faxing and emailing the resultant Purchase Order.

The customer needed the process to be automatic, and to have built in safeguards in case of errors during entry.

The Purchase Order is generated, in either batch or “on demand” mode, from the ERP engine and is sent automatically to Create!form. Create!form then:

- ✳ Inspects each PO to determine the method of delivery the user has requested – which can be any combination of print, email and fax.
- ✳ The format of the Purchase Order is applied in Create!form automatically; including application of the customer logo and elegant layout of the output itself.
- ✳ Output via fax is assembled and handed off to the location specific RightFax fax engine for delivery. Information from the PO is used to complete the cover page automatically.
- ✳ Output via email is assembled and handed off to the email server. The To address, From address (Buyer), subject line (built including data from the PO itself), body of the email (including data from the PO itself), and naming of the embedded PO file (again, using data from the PO) are all created automatically by Create!form.
- ✳ Output via print is sent to the appropriate printer within the company based on the user / buyer who originated the order.
- ✳ In case of errors where the email address or fax number is missing, an email is sent to the appropriate buyer to notify them, and the order is printed instead.
- ✳ The method of delivery and the delivery address for the PO (i.e., fax, print, email) is identified on the PO print itself, leaving no chance for errors or disputes.

The Benefits

- ✳ On an order by order basis, the users can determine how to deliver the PO to the supplier – and it is then done automatically and elegantly.
- ✳ Electronic delivery of the orders is saving labour, postage and paper costs – adding to the bottom line.
- ✳ The PO itself is a full featured and professional looking document – much better than the base output from the ERP engine.



**Business Process Sample – as used by existing Create!form customers**

**Process – Invoice/Quote/Packing slip processing and delivery**

**Customer: Canadian distribution and service company**

The Process

The customer operates facilities for product supply and servicing in a number of different locations across Canada. Each location provides customers with the ability to have the products delivered or picked up. The company operates under two company names.

Documents are generated out of their ERP engine and then passed to Create!form.

Create!form then:

- ✱ Inspects each document to determine the location to which the document belongs (the branch). The document is also inspected to determine if it is a cash sale or regular sale – cash sale documents are directed to the printer at the cash counter in the branch – all others are directed to the back office printer.
- ✱ Inspects each invoice to determine what type of document it is – Invoice, Order Acknowledgement, RMA, Credit Note, Blanket Order, Quote Order or Packing Slip. The appropriate format for the output is then applied – automatically.
- ✱ On each document, the appropriate format, data, layout and branch information is applied automatically by Create!form. All documents, be they Quotes, Blankets, RMAs, Packing Slips, Credit Notes, Acknowledgements or Invoices share a common and consistent look and feel. Discount percentages are calculated in Create!form, and labels for taxes (which will vary from province to province) are applied automatically.
- ✱ Certain branches require multiple copies – this is done automatically in Create!form.

The Benefits

- ✱ Automatic document routing and printing based on data on the document – which could not be done otherwise.
- ✱ Consistent professional look and feel.
- ✱ Greatly reduced programming requirements and no preprinted forms.
- ✱ Location based delivery
- ✱ Automatic repagination capabilities has dramatically reduced the number of pages of output actually printed.

Other Create!form uses at the customer:

- ✱ Accounts Payable Cheques
- ✱ Accounts Receivable Statements
- ✱ CSMS Packing Slip, Quote, Invoice, Tool Tag
- ✱ Purchase Order (several different formats), Purchase Receipt, Quote Order, Purchase Return
- ✱ Manufacturing Work Order



**Business Process Sample – as used by existing Create!form customers**

**Process – Co-operative Advertising**

**Customer: Canadian media company**

The Process

The customer operates in the Canadian music distribution industry, shipping to major and small retailers across the country. As is standard in the industry, advertising for releases is often shared cooperatively by the customer and the retailers.

The documents for the Co-op advertising are generated via the ERP engine. Create!form then:

- ✳ Applies the format of the document automatically – including selecting the appropriate company logo to use (there are 3), formatting all dates and numbers for easier reading, and using different first/last and subsequent/previous headers and footers to allow more detail to print on each page. All labels are printed in both French and English via Create!form.
- ✳ Customer copies are printed with the appropriate label (Customer Copy 1, Customer Copy 2) and internal copies are also appropriately labeled.
- ✳ Internal copies are emailed to the right individuals internally – the manager of the Co-op process and accounting.

The Benefits

- ✳ Prior to the upgraded design in Create!form, the output had required nine separate designs – one per company and copy required. This has been reduced to a single design.
- ✳ Email delivery of the internal copies has sped up the processing, eliminated lost documents, and saved on paper and printing costs.
- ✳ A friendly and easier to read document has been designed – to the benefit of the retailers and the customer.

Other Create!form uses at the customer:

- ✳ Accounts Payable Cheques
- ✳ Purchase orders – from two separate ERP engines
- ✳ Accounts Receivable statements – with language application automatic via Create!form, as well as portrait format cover page for the landscape statements (thereby allowing easy insertion into regular window envelopes) and electronic statements for selected customers.
- ✳ Return Authorization – with automatic language recognition and formatting
- ✳ Sales Invoice– with automatic language recognition and formatting





## **Business Process Sample – as used by existing Create!form customers**

### **Process – Electronic storage and retrieval of documents**

**Customer: Canadian high tech company**

#### The Process

The customer designs, assembles, sells and services high end electronics used in industry, entertainment and government. They operate several primary facilities in Canada and the US, and have service reps across both countries. Their ERP engine supports finance, distribution, and service work.

The customer wanted to get away from direct printing of internal copies of documents (both external documents and internal only documents), and allow access to copies of these documents across the organization. They already were using Create!form for the output and delivery (print and email) of documents ... this was extended to include the Create!archive feature.

The following documents are now stored electronically within Create!form, and are accessible by a custom created ASP.NET front end:

- \* Purchase Orders
- \* Sales Order Invoices, Order Acknowledgements
- \* Service Work Orders and related Invoices
- \* Customer Statements
- \* Bill of Lading
- \* Pick Slip and Pack List
- \* RMA Letters and Statements
- \* AP Cheques
- \* Inventory receipts register
- \* Customs documents
- \* GL Posting report
- \* Inventory Tags and Inventory count WIP report

#### The Benefits

- \* On line, immediate access across the organization to the reports and documents
- \* Documents are no longer lost or misplaced
- \* Reprints can be done from the Archive search screen, as can email forwarding of the documents
- \* Significant reduction in internal printing and filing costs and labour
- \* Estimated payback of over 325% over 3 years, with savings over this period estimated at over \$225,000.



## Business Process Sample – as used by existing Create!form customers

### Process – Accounts Payable Cheque Processing

**Customer: Construction company**

#### The Process

The customer is a large player in the construction industry operating across Canada and the United States building residential, commercial, and industrial facilities. Their ERP systems is used at their job sites and their main offices, running under numerous companies and from many bank accounts.

The customer's requirements included the need to reduce the time spent in sorting, signing and processing these payments across all of their divisions and sites. The payments are generated from their ERP engine and sent to Create!form, where:

- ✳ The cheques are sorted into three groups, based on the over/under amounts at two levels for the bank account in question (i.e., under \$10,000, between \$10,000 and \$100,000, and over \$100,000).
- ✳ Cheques requiring automatic signatures are automatically signed, based on the signing authorities for the specific bank account and that appropriate amounts for that account.
- ✳ A separator page is printed between each of the three possible splits – making it easier to separate them for possible manual signatures.
- ✳ Summaries of each of the three groupings are created and printed at the end of the cheque run. These summaries, and the separator pages, are printed from plain paper on the cheque printer.
- ✳ A summary of cheques over the top limit are is prepared and emailed to the Finance director automatically.
- ✳ A copy of each of the summaries is created and stored on a network folder; the folders are created using the Bank name and account number; the summary file itself includes the last cheque number in the run
- ✳ The MICR line is applied by Create!form and printed on the cheques.
- ✳ Logic is applied by Create!form in the design to determine the wording and coding on each cheque – for US versus Canadian cheques, number of signatures required, bank address, company address, date formats and more.

#### The Benefits

- ✳ Streamlined process with intelligent sorting and sequencing drastically reduced the manual work associated with the cheques.
- ✳ Consolidated, generic cheque stock reduced the costs of ordering and maintaining this stock.
- ✳ Electronic notification of large cheques and auto creation and filing of summaries eliminated hours of manual work each week.
- ✳ A highly manual process was made highly automated.

