

## CASE STUDY:

# INTER-COMPANY PAPERLESS INVOICING

## SCENARIO

A National Transportation Association serves as their respective industry's ticket processing agent, facilitating the processing of payables, receivables and associated services. There are approximately 70 individual companies under the association umbrella, which interact with one another by sharing schedules and billing each other based on previously-defined terms and conditions. Not surprisingly, this invoicing process was time consuming, laborious and generally inefficient. The legacy process dictated that each company manually sort through each ticket associated with travel (grouped together by carrier), manually key more than 20 required fields, create billing worksheets, and physically send invoices to the partnering companies along with all associated tickets.

In addition to the inefficiencies inherent to the manual processing, a host of related issues were common to all participating companies:

- The process, due to its manual nature, was cost-ineffective and error-prone
- Payment and billing disputes were immensely difficult to manage
- The rising cost of postage was straining departmental budgets
- Paper-based workflow required physical copies and storage of all invoices and support documentation

The identification of the business needs at hand was a joint effort of multiple stakeholder companies, formalizing these needs into project form. Included within this quorum was a cross-functional representation of departmental leadership, including IT, project management, accounting and development personnel. This cross-functional team was responsible for driving the initial vision, functional requirements and implementation of the solution as proposed by XTGlobal.

XTGlobal proposed the automation of the entire process by incorporating a hosted technology solution, including a common and accessible user-facing web portal available to all participating companies. This solution would be designed to increase transparency and access across companies, in addition to facilitating the transition from paper-based to digital process management.

## PROJECT GOALS

The goals requested by each of the participating companies were discussed, with the following being identified as the project consensus:

- Short project ramp-up period
- Minimal initial and ongoing demand on internal IT resources
- Immediate increase in productivity and efficiency of existing workforce

## PROJECT ASSUMPTIONS

In order for the project to be successful, assumptions were agreed upon by XTGlobal and the client. These assumptions detail that the client provide:

- Internet access at all scanning stations
- A defined list of fields to be extracted
- A dedicated point of contact at each scanning station



## PROJECT AT A GLANCE

### CONSOLIDATING DATA ACROSS MULTIPLE COMPANIES & LOCATIONS

This project required the development of an industry-specific cloud solution, with which disparate paper-based data sources could be consolidated, digitized and published to a range of intra-company personnel. This led to the creation of a data extraction and publishing workflow, complete with robust quality assurance processes and role-based web portal access.

## KEY ELEMENTS:

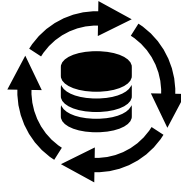
- Automated batch uploads of client documents to XTGlobal ftp servers
- Document digitization and data entry provided by XTGlobal, resulting in robust data mining capabilities
- Data and documents accessible 24/7 via role-based web portal
- Simple 1-step billing worksheet and invoice creation process

# THE SOLUTION



1

XTGlobal's proprietary scanning software is installed on each of the company's scanning stations across all physical locations. Tickets scanned are then batched daily and automatically transferred via secure FTP into the XTGlobal image repository, housed and secured at a Level Three Data Center. XTGlobal also maintains up-to-date SSAE16 Type II audits, providing heightened protection of control and processes.



2

Ticket data is then extracted using XTGlobal's proprietary software, where quality assurance and 3-way matching provide 99+% data accuracy across both hand-written and printed ticket data. This includes detailed exception handling capabilities. The extracted data is then loaded into the online interface with a side-by-side view next to the original ticket image for reference.



3

Role-based security allows company personnel to access their instance of the web portal to view ticket data for reference, editing, approval, and advanced data mining. Users can then create billing worksheets and invoices with a simple one-step process and send the invoice, including all supporting notes and documentation, to the partnering company's inbox for review and payment. Partnering companies can access the portal to review invoices, approve for payment, decline payment or create a billing dispute.

# THE RESULTS

Upon project completion, the participating companies realized a 75% time savings benefit, and were provided with over 99% data accuracy across invoice data entry, all with minimal client IT bandwidth and support.

**75%** & **99+%**  
TIME-SAVING BENEFIT DATA ACCURACY

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