

PartnerLinQ for a Promotional Merchandise Distributor:

Delivering visibility,
scalability and control



PartnerLinQ
Connect Possibilities.

The Company

Our client is a promotional merchandise distribution company founded in 1953. Based in Los Angeles, CA, the company is one of the top distributors of promotional merchandise in the United States.



The Challenge

Paper Invoices and OCR

Our client is a services oriented company, very careful in its strategic approach to customer projects. At the company, it is about more than just printing logos on products, it is about problem solving, exceeding client expectations, and delivering on target and on budget.

Our client's services are marketing-oriented, rather than product-oriented, and in this customer-driven environment, getting it right is a priority. This notion has led to more than 80,000 merchandise invoices annually, which is more than 6,000 inbound invoices every month. Each of them is an example of why for 65 years and counting, the company continues to be a leader in its industry.

While the initial challenge was managing a large and growing number of manual, email and paper invoices, the Accounts Payable team experienced more than 50% reduction in efficiency. To compound matters, a relatively new off-the-shelf OCR solution was installed and was still unable to read invoices from top vendors and write them directly into the Accounts Payable system (ERP).

The DIY OCR solution was unable to separate multiple invoices provided in a single PDF, nor could it perform freight charge matching to the order in the order management systems (OMS). This not only affected the three-way match, it was also having an adverse effect on payments to vendors.

The Demonstration

The Business Case and PartnerLinQ Demonstration

Our client's team members were willing participants as the demonstration got under way and were eager to provide sample invoices. PartnerLinQ effectively showcased its proficiency in managing a range of intricate issues. This encompassed handling invoices from vendors that featured distinct entries for freight and additional charges.

The invoicing process during the demonstration validated, among other things, PartnerLinQ's ability to differentiate duplicate invoice numbers and align line items through various billing cycles. The client's team was sufficiently impressed and provided a wealth of positive feedback.



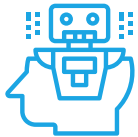
The Solution

PartnerLinQ "Scan to EDI"

PartnerLinQ's "Scan to EDI" solution converts manual processes into electronic transactions. It leverages RPA, OCR, DMS, BPO, AI, and business process integration at the speed of business.

Simplified & Flexible Data Capture

Scan to EDI makes use of robotic process automation (RPA) and artificial intelligence (AI) to automate the recognition, identification, and extraction of text and financial data. As a result, it provides flexibility to integrate more content and content types with more channels well beyond the capacity of off-the-shelf OCR solutions.



Robotic Process Automation

Beginning with Robotic Process Automation (RPA), Scan to EDI makes use of bots to perform manual functions previously performed by the Accounts Payable team, functions such as separating attachments from email messages and performing data retrieval and data extraction routines from remote websites.



Optical Character Recognition

Scan to EDI uses optical character recognition (OCR) to extract, transform, index, and store images of the transaction.



Document Review Automation

PartnerLinQ provides the ability to configure business rules and automatically review and post extracted invoices to the enterprise system. Exceptions generate alerts to the interested parties and while transactions can be configured to reprocess automatically, exceptions can also be routed for human review. PartnerLinQ provides the ability to configure and execute multi-level approval workflows such as cost discrepancies or mismatched invoices.



Artificial Intelligence

PartnerLinQ uses artificial intelligence for sorting, tagging, and automated error handling of transactions ensuring each transaction is properly handled and any junk mail is disposed of properly according to embedded business rules.



Document Management Software

PartnerLinQ's Document Management Software receives tracks, manages, and stores transaction documents. Precisely identified by transaction type, the documents are immediately available and begin to process automatically. PartnerLinQ matches the transaction to known transaction formats and loads the data directly to the ERP through PartnerLinQ's Common Processing Workflow.

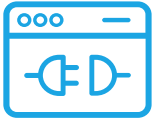


PartnerLinQ's Enterprise Integration Framework

PartnerLinQ's exclusive Enterprise Integration Framework marks a distinctly new approach to integration providing agility and resiliency to the supply chain. The Enterprise

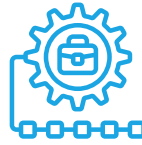
Integration Framework connects directly with the client's enterprise system, eliminating multiple translations and secondary flat file integration. Because it is a hosted framework, it maintains native integration support for more than 73 TMS, WMS, and ERP platforms, adaptive accelerators, and APIs.

Modern supply chains require digital connectivity with the ability to adapt and overcome an evolving environment and deliver despite any challenges.



Application Integration

PartnerLinQ's exclusive Enterprise Integration Framework provides the real value for the company, because of which invoices flow without human intervention directly into the client's enterprise system. PartnerLinQ's seamless integration with the ERP allows robust invoice matching for both automated and manual review and processing. Business rules, error handling, and alerting is all included with PartnerLinQ and pre-configured on delivery, ensuring that the Accounts Payable team is alerted to any condition, particularly any condition necessary for managing key partners, customers, or vendors.



Business Process Outsourcing

PartnerLinQ's Scan to EDI solution delivered 40% accurate scanning and processing through the ERP. The achievement accommodated strictly out of the box and without customization. The client and PartnerLinQ's Business Process Outsourcing ensures the level of accuracy continues to grow. BPO manages the initial rejections making minor modifications whether in the initial response, the mapping, or the error handling and can add transactions, vendors & customers in the fly.



The Results

Enterprise integration that dramatically simplifies the invoicing process providing:

1. an end-to-end toolset for a largely manual invoicing process
2. an agile, resilient, and completely digital supply chain infrastructure that ensures a consistent flow of data into the enterprise, and
3. an automated means to manage invoice subtleties or inconsistencies between the ERP and the trading partner



Scale in transaction volume

The PartnerLinQ team helped the client scale to the volume on invoices from the company's expanding vendor network. PartnerLinQ's Azure-based hybrid cloud architecture ensured that the client's systems could handle nearly 6,000 invoices per month—almost twice as many as the previous OCR installation— and without additional human intervention



Enhanced visibility to address pain points

Real-time insight is key to consistent value at every touchpoint. PartnerLinQ helped the company turn around the falling service ratings with some of its biggest vendors by providing greater visibility into the operation to its Accounts Payable team and by reducing the DSO (days sales outstanding) for its vendors. Now, the company is on course to deliver consistently on its own internal service-level commitments



Integration at the speed of business

PartnerLinQ simplified the invoice induction process through its Common Processing Workflow. Complemented by the Business Rule Manager, the entire migration, involving hundreds of partners and completed in just 12 weeks.



Simplified IT infrastructure

PartnerLinQ integrated seamlessly with the client's ERP systems and, as a result, the company is now driving even greater efficiencies with cooperative technologies that provide real-time updates and actionable insights.



The Future

What is next for the client?

While the client is not a typical business case for EDI platforms and technologies, the company was able to make use of the PartnerLinQ platform and its technologies to innovate and automate a manual invoicing process, and scale its way to the speed of business. Large volumes of manual transactions such as utility bills, freight bills, and credit memos, receiving documents, business expenses and purchase orders are among those considered next round of opportunities for improvement.

Tools & Technologies



About the Client

Where Ideas Take Flight

Our client is a premier provider of targeted advertising and marketing solutions and has been in the branded merchandise industry for over 65 years.

The firm's work is about extending your brand through promotional products, printing, direct mail, creative solutions, online marketing, event support, campaigns, and so much more. The client has all the experience and resources you need.

The company's experienced management and creative teams will work in coordination with your company's internal marketing department or take the lead on a project-by-project basis. It has handled the printing, mailing, and promotional needs of Fortune 500 and Fortune 1000 companies around the world.

The client is ready to provide you with the best solutions and services with offices in 26 locations around the world.



PartnerLinQ - an Innovative, Cloud-Native Supply Chain Visibility Platform:

PartnerLinQ delivers resilience through simplifying visibility and connectivity. PartnerLinQ's Native App Ecosystem adds business context to traditional integrations, minimizing the impact of disruption. With capabilities for intelligent hyper-automation, multi-channel integration, and real-time analytics, PartnerLinQ seeks to seamlessly connect multi-tier supply chain networks, channels, marketplaces, and core systems worldwide to deliver unified connectivity for the future.

About PartnerLinQ

PartnerLinQ is a highly scalable cloud-native multi-tenant multi-geography hyper-scalable high-performance SaaS B2B API & EDI platform that integrates natively with partner ecosystem & e-commerce channels with native solutions for meeting B2B API & EDI challenges. Reimagine control, visibility, and transparency across your global supply chain and e-commerce. Unify channels, boost loyalty, gain visibility, and accelerate order fulfillment. Manage global supply chains, material planning, package sourcing, and omnichannel retail, drive growth powered by cutting-edge technologies, and unlock valuable insights with Visionet products.



Headquarters Cranbury, NJ

4 Cedarbrook Drive
Bldg. B
Cranbury, NJ 08512
United States

London

The Smith
145 London Rd, Kingston
upon Thames KT2 6SR
United Kingdom

Munich

MaximilianstraBe 13,
80539 Munchen,
Germany

Toronto

2425 Matheson Blvd.
East, 8th Fl.
Mississauga, ON
L4W 5K4
Canada

info@partnerlinq.com
www.partnerlinq.com

