

Customer Success



Customer Challenge

- Multiple back-office systems forced manual matching of documents to recipients.
- The creation, matching and distribution of customer-facing documents required as much as 120 hours of staff time.
- Customer data is housed in several back-office systems, including Microsoft Dynamics GP.

Solution

- Bottomline Technologies' Create!form® product suite

Benefits

- Use of electronic documents has eliminated need to maintain an inventory of pre-printed forms.
- Generating and distributing customer-facing documents can now be completed within days.
- More efficient, professional-looking documents has helped ease inbound customer inquiries.

Bottomline's Document Process Automation Solution Gets Rave Reviews from Trafford Publishing

Create!form® Streamlines Author Statements and Payments for Microsoft Dynamics™ GP Users

One of the world's most prolific publishers, Victoria, British Columbia-based Trafford Publishing is a pioneer in on-demand publishing services for businesses, agencies and individuals. The company published more than 3,000 new titles in 2005 with authors in more than 105 countries relying on its publishing and distribution services. The company's books are printed in Canada, the United States and the UK, and sold through a network of global distributors.

TRAFFORD

Manual Document Matching Creates Resource Headache

As an on-demand publisher, Trafford shares a unique relationship with its customer base, which is comprised of approximately 10,000 authors. Through its publishing and distribution packages and services, Trafford's customers are able to select the publishing options that best suit their needs and budgets. Once a book has been published, authors receive quarterly royalty payments from Trafford representing the author's percentage of each book sold.

Although the documents that authors receive may vary, a single mailing can include as many as five different documents per author (i.e. royalty statement, royalty payment, account statement, newsletter, and EFT remittance). Because data used to generate the documents was maintained in multiple back-office systems, including Microsoft Dynamics™ GP (Great Plains), Trafford's accounting staff was forced to manually match documents to corresponding authors. This matching process was both laborious and time consuming. On average, the creation, matching and distribution of the customer-facing documents alone was a month-long process requiring at least 120 hours of staff time.

Integration with Multiple Databases a Critical Factor

To address the high costs and inefficiencies of its document generation processes, Trafford turned to Bottomline Technologies and its Create!form product suite. Already familiar with the suite's innovative electronic document capabilities, Trafford executives realized that Create!form was the only solution capable of integrating with all of its databases, including an internally developed CRM system housing author royalty information.

Integrating seamlessly with industry-leading ERP systems, including Microsoft Dynamics, the Create!form product suite enables users to extend their ERP investment through advanced output formatting capabilities that replace paper-based documents and forms with more efficient and cost-effective electronic documents. Once created using standard ERP output, these customized electronic documents can be rapidly delivered across multiple channels such as fax, email, print or the Web via automated routing logic.



About Bottomline Technologies

Bottomline Technologies (NASDAQ: EPAY) provides payments and invoice automation software and services to organizations seeking more secure and efficient financial processes. The company remains at the forefront of delivering innovative solutions that complement and extend the value of existing financial processes, business relationships and back-office systems. These solutions have enabled industry-leading corporations, banks and financial institutions to automate, manage and control processes involving payments and collections, invoice approval, cash flow, risk mitigation, reporting and document archive. For more information, please visit www.bottomline.com.



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Electronic Documents Enhance Customer Satisfaction

Since deploying the Create!form suite earlier this year, Trafford has been able to completely transform its approach to managing and distributing customer-facing documents. Documents such as statements and the company newsletter are now generated electronically and, when applicable, distributed to authors via email as PDF attachments. The entire process of generating and distributing documents, which once took nearly a month, can now be completed in a few days.

At the same time, the company has eliminated the need to store and use pre-printed check stock for royalty payments, and can now affix a digital signature to royalty checks totaling less than \$1,000. In the past, thousands of royalty checks, regardless of amount, were all hand-signed. Trafford's use of electronic documents has also helped to enhance satisfaction among the company's customers. The composition and appearance of the new documents has been a contributing factor in reducing the number of customer inquiries related to document information.

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