# Accounts Receivable Improvement Using AgilePoint to Integrate Microsoft Exchange with Accounting Application

Providing high quality cultured dairy products since 1917, Daisy Brand is an example of a firm that was able to gain more value from their existing IT infrastructure. Prior to their AgilePoint deployment, they had already made extensive IT investments in an ERP system (Protean), order management, logistics, and shipping applications along with a variety of other custom-developed in-house applications. With AgilePoint, process-based applications were built on business requirements that spanned multiple systems.

## Challenge & Objective

Kevin Brown, CIO at Daisy Brand put it like this: "While our applications themselves do a wonderful job, applications do not follow up. It is like work is thrown over the wall to workers and the expectation is that it is done and completed. As a result, things can fall through the cracks – between workers and business applications, and between the different roles in the business itself. This is where business processes tend to breakdown."

Daisy Brand was after a solution that would help them to bridge the system-to-human gap, yet would allow them to leverage their existing investments in .NET and Web Services and work smoothly with their third party messaging platform. Daisy Brand was looking to process-enable their existing Microsoft applications without having to invest in high-end Java-based approaches with high complexity.

## Project Solution

### Project Goal

The goal of the initial project was to support the Accounts Receivable employees with better 30-60-90 day follow-ups by directly integrating Microsoft Exchange with the accounting application.

> "We are really pleased with the result. The main benefit is a consistent follow-up on all of the deductions for accounts receivables. We now have a process that tracks changes, from the time the deduction is received to the time it is closed. AgilePoint ensures that employees follow-up on customer commitments made during the resolution of deductions. Moreover, I can also measure that cycle time, allowing ongoing optimization."

—*Chief Information Officer, Kevin Brown*

*Project Approach*

AgilePoint provided a development framework that helped Daisy to create an Accounts Receivable application that leveraged their existing Microsoft investments such as Microsoft Visio, Microsoft Exchange, Microsoft Office, and other custom-built internal applications.

Daisy Brand used AgilePoint to manage the new process and enhance the Microsoft Exchange interface to automatically insert reminders and follow-up events directly into Outlook email and tasks for the relevant staff members.

*Project Success*

The bottom line impact was an increase in collections by 2 days-worth of sales (where the average figure is already less than 20 days). This is a 10% increase, which represents a significant benefit to the business.



10% Increase in Collections
Develop & Deploy Timeline: 7 Weeks

## Additional Business Benefits

The solution yielded numerous benefits that increased Daisy Brand's Accounting operating efficiency:

 Comprehensive Forms

Comprehensive and contextual forms that allow users
to receive the data they need to complete their activities. That takes away any guess-work in how they should be processing deductions or what they need to do to complete a process

 Flexible Reporting Infrastructure

A flexible reporting infrastructure that makes information available to all departments and multiple levels of management – reducing IT costs and complexity

 Alerts & Notifications

Alerts and notifications to ensure processes are not delayed by overdue tasks and that help ensure projects finish on-time