

## Process documents securely and with little effort

Baosteel Tailored Blanks uses the automated solution Kofax Total Agility for its invoices

Reference project:



**“All the relevant data for our invoice process is extracted by the Kofax software, matched with SAP, and forwarded to the downstream systems. That saves time – and, of course, money – in many places in the process.”**

Süleyman Küçük, Team Leader, IT Baosteel Tailored Blanks

How can invoice receipt processes be optimized and automated? Baosteel Tailored Blanks, a specialist in lightweight construction that was founded in 1983, also faced this question. With 17 locations across three continents, more than 400 employees (239 of them in Germany), and revenues of around 148 million euros (data from 2019), Baosteel Tailored Blanks is a successful automotive supplier with expertise in lightweight construction – specifically in the area of laser-welded products. Most business enterprises still work document-based in many areas. Currently portal solutions for the pure electronic processing of information currently primarily exist in the public sector. This applies in particular to invoices and credit notes, which are predominantly still submitted in printed form or, in rare cases, sent to customers as PDF email attachments. By contrast, the processes that are used for invoice and credit note processing are largely completely digitalized. This means that the relevant information, such as the invoice amount, has to be transferred from printed or PDF documents into an electronic, digitally processable format.

In the worst case, this involves an administrator entering the information in the digital system manually and then scanning the documents and importing them into the corresponding systems. These burdensome activities take up a lot of time and staff resources. The processes are also error-prone, because any typos made during the manual transfer of information can impair the process.

### At a glance

- Highly automated solution for processing invoices and credit notes
- Automatic recognition of the type of document involved
- Integration with SAP and the ImageMaster archive system
- Reduction of manual activities and elimination of sources of errors

# Reference in detail

## The challenge

Baosteel Tailored Blanks also has to deal with large numbers of invoices and credit notes every day. The company only receives 20 % of them via e-mail as PDF files; all the rest arrive as conventional printed documents. The challenge is to process these specific documents with a minimum of manual effort, with the files having to be digitalized, their content captured, and the original documents archived. In addition, all content must be passed on to an SAP workflow.

## The solution

As part of a project for improving their invoice processing workflow, the company asked about an automated solution based on OCR and similar technologies. According to Süleyman Küçük, the previous process was error-prone, which required a lot of manual intervention by employees in the respective business unit and within Accounting. Since the company was unable to achieve the desired results, they decided to implement a solution from

T-Systems, based on the Kofax Total Agility platform (KTA), a product for the digitalization and automation of document-based processes. All printed documents are now scanned and passed on to Kofax Total Agility, which automatically recognizes what type of document (invoice or credit note) is involved and then processes it in a workflow specific to the identified document type. Süleyman Küçük confirms this: “The recognition of data is outstanding. Subsequent corrections are only rarely needed.” The content (metadata) that is relevant for the invoice process is then extracted and, based on the PO number, a query is started in the SAP database to find the transaction to which the invoice or credit note belongs. The digitalized documents and metadata are then forwarded to the ImageMaster archive system and from there to SAP. Recognition of the document type and extraction of the metadata are performed with the support of AI (artificial intelligence), which means no rigid set of rules has been defined. Instead, Kofax Total Agility has “learned” how to tell the documents apart and find the relevant data within them.

## Customer benefit

Thanks to the smart solution from T-Systems, Baosteel Tailored Blanks is saving time and money, as the company itself confirms. It now has a platform that makes it possible to process invoices and credit note error-free, with a high level of automation. Only a few manual steps are required to send the documents and other important information to the responsible administrators within Accounting, who can now approve transactions for posting with a few clicks of the mouse. The overall process is accelerated by the automation, giving employees more time to spend on other tasks. Süleyman Küçük underlines: “The solution is very stable. We haven’t had a single outage of Kofax so far.”

### Further advantages:

- A platform is available that can be used for every process and the corresponding documents and content involved.
- Enhancements are relatively simple, which means new processes can be implemented at short notice.
- Thanks to the use of the AI technology, the system improves continuously. New document types or invoices from suppliers that the system has not yet encountered merely have to be taught – no rule sets have to be modified.

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