



CASE
STUDY

**Fortune 500 Company
Automates Dunning
Management
Simplifying the Billing
Process**

CUSTOMER PROFILE

Founded in 1935, a Fortune 500 company with 18,500 employees worldwide, the company is a global provider of products, services and solutions to industrial and commercial users of electronic components and enterprise computing solutions, with 2015 sales of \$23.28 billion. The company is headquartered in Centennial, Colorado.

The company serves as a supply channel partner for over 100,000 original equipment manufacturers, contract manufacturers and commercial customers through a global network of more than 460 locations in 85 countries.

BUSINESS CHALLENGE

In addition to the manual procedure for sending the dunning letters, the business had to send payment reminder letters (collection letters) to clients having outstanding dues over and above a certain timeframe and amount. This meant tracking and monitoring the process for 20,000 customers on a day-to-day basis. Hence the business was looking for a solution to automate the entire process. This would include keeping track of the overdue days for each customer and the amount that was outstanding.

Parameters needed to be setup for the minimum number of days and the amount due and enable the collection department to change these parameters based on their discretion.

Based on the open invoices in the previous week, the automated batch was scheduled on a weekly basis to send the letters for the same. The letters were sent for only open invoices where the letter was not sent even once.



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SOLUTION

To meet the demands of the business and to increase the efficiency the following solution was implemented:

- A batch job was created in Microsoft Dynamics AX to check for all open invoices for every customer
- The customer was given the flexibility of selecting the template, delinquency and the number of reminders. These were maintained in the system.
- The layout of the details of the Invoice number, Invoice Amount, Unpaid Amount, Invoice Date and due date were maintained in the template.
- The number of days past due and the overdue amount were added as editable parameters so that the Collection Department could decide the same and change them as and when needed.
- A history log captured the details of the notifications being sent out.
- Errors were captured at the batch level.

BENEFITS

The automation allowed the business to gain efficiency, increase productivity and additional benefits:

- Streamlined the process of sending dunning letters.
- Chances of manual errors is significantly reduced as manual intervention is minimal.
- Ability to track status of letters sent made easy.
- Collection department need not worry about the day-to-day procedure thus saving time and costs.

TECHNOLOGY



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