



## Wakefield Canada's Microsoft Dynamics® AX Implementation Runs Smoother with Bottomline

### Creata!form® Solution Helps Strategic Business Partner of British Petroleum Transform Its Approach to Transactional Documents

As a strategic business partner of British Petroleum, Wakefield Canada is the exclusive distributor of the Castrol® brand of premium synthetic and conventional motor oil and lubricants in Canada. With more than 130 employees, the Toronto, Ontario-based company is responsible for managing the sales, marketing and distribution of Castrol products.

Transactional documents such as invoices, checks, pick tickets, statements and packing slips have always been an integral part of business. But as the speed of doing business increases, the need to transform processes surrounding these documents has multiplied dramatically. For many organizations, the process inefficiencies and high costs associated with composing and distributing important documents are compromising trading relationships, internal resources and profits. And efforts to transform document reporting can often be hindered by complex programming changes to application code that can be both time-consuming and costly.

*“While our Microsoft Dynamics reporting was certainly functional, it did not allow our organization to achieve its goals for operational efficiency and cost control. Given the important role different types of documents play in helping to facilitate our business, we believed it was time to take a fresh approach to ERP output, one that would enable us to institute the changes we needed without having to endure significant custom programming.”*

Don Weston  
Director of Business Technology  
Wakefield Canada

#### Implementation Partner Helps Drive Transition

In January 2006, Wakefield Canada requested that its Microsoft Dynamics implementation partner, a large, global systems integrator, help the company transform its approach to transactional document output and recommend a suitable

solution. Following an evaluation of potential offerings, the decision was made to go with Creata!form from Bottomline Technologies, with implementation support to be provided locally by Bottomline Gold Partner TeamCain. Based in Peterborough, Ontario, TeamCain provides comprehensive, high-quality consulting services that allow its customers to realize the full potential of their Enterprise Resource Planning (ERP) initiatives.



Rather than divert resources from more important aspects of the implementation to handle the required programming changes, TeamCain demonstrated how Wakefield Canada could use Bottomline's solution to create document-centric applets quickly, without the more costly X++ coding usually required for corresponding customizations of Microsoft Dynamics AX.

*“Having worked with Bottomline's solutions in the past, and witnessed the benefits our clients had derived first-hand, the decision to recommend Creata!form was an easy one. For an organization such as Wakefield Canada, Bottomline offered the right mix of real-world expertise and solution functionality that would enable them to get more business value from their Microsoft Dynamics AX output.”*

Michael Guerin  
Creata!form Practice Director  
TeamCain

#### Bottomline Solution Delivers Immediate Benefits

Bottomline's award-winning document process automation solution allows organizations to automate and manage business processes that rely heavily on transactional documents. Through the electronic composition, routing, delivery and storage of transactional documents, organizations can operate and interact with customers and suppliers more efficiently and cost-effectively. Integrating with

industry-leading ERP systems, Bottomline users leverage Create!form to quickly create and deliver these electronic documents across multiple channels.

With Bottomline's solution fully deployed, Wakefield Canada has realized significant benefits across a number of its document reporting processes. Through its use of Create!form, the company has been able to streamline business processes to reduce staff involvement and unnecessary document printing; quickly turn any document into a multi-lingual form; auto-print documents to specific warehouses across the country; provide electronic distribution of customer-facing documents; and create a more economical approach for printing accounts payable checks.

*“TeamCain not only understands Create!form but the workflow associated with document-centric business processes and how to enhance them. To add up the ways in which we've realized value and new efficiencies from this implementation would make for a long list. I can't imagine implementing Microsoft Dynamics AX without Create!form, nor could our organization have conducted this type of implementation without a partner such as TeamCain.”*

Don Weston  
Director of Business Technology  
Wakefield Canada

### Transforming Invoice Generation

While the implementation has yielded benefits in multiple areas, perhaps the greatest improvements involve processes for invoices and pick tickets. In the past, Wakefield Canada's invoices were generated individually, requiring manual collating for clients receiving more than one invoice. At the same time, the labor-intensiveness of the process meant it was difficult for personnel to comply with a business requirement to pull 'exception' invoices from being mailed out to clients.

To reduce human intervention and streamline this process, Create!form dynamically determines the delivery preference of each customer from data stored within the Microsoft Dynamics AX accounts receivable module and automatically distributes each invoice via email, fax, print or any combination of the three. To help further manage exception invoices that require special handling, Create!form looks into various data elements for each transaction and applies routing logic that facilitates the

identification of invoices that should not be distributed. Through the use of Optical Recognition Markers, which are printed in the margin of each page after the invoices have been automatically grouped and sorted, Wakefield Canada can leverage Create!form in conjunction with its automated folding and mailing machine to further simplify distribution processes and reduce mailing costs.

*“From beginning to end, the processes surrounding our invoices were intertwined with inefficiencies and system limitations that not only impacted approval time, but also our ability to deliver clean, professional-looking documents to our customers. Since implementing Create!form, we've been able to closely align invoicing processes with our business and customer requirements.”*

Don Weston  
Director of Business Technology  
Wakefield Canada

### Greater Flexibility Enables Door to Pick Ticket Process Improvements

With its pick ticket processes, Wakefield Canada experienced similar levels of inefficiency. But through the use of Create!form, the company has introduced a number of process enhancements. For example, Create!form can determine whether a pick ticket is 'bulk' or 'package' and automatically direct the print job to a line printer containing pre-printed forms for bulk shipments or a laser print for individual shipments. The solution has also provided the company with the ability to print information relative to hazardous materials directly on the pick ticket, and distribute tickets to one of the company's seven warehouses.

*“If you look at the improvements we've realized across the board in our pick ticket process, you get a true sense for the multitude of ways in which Bottomline's solution can impact an important business process or function. The flexibility inherent in the solution has provided us with the opportunity to build upon the strengths of the Microsoft Dynamics AX platform to quickly improve how information is presented on the pick tickets as well as establish more efficient distribution processes.”*

Don Weston  
Director of Business Technology  
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