DocBits

How Pfaudler uses AI to transform documents and streamline processes

ABOUT PFAUDLER

Pfaudler GmbH, as part of the GMM Pfaudler Group, which has been successfully listed on the Indian stock exchange for several years, looks back on an impressive history. For two centuries, Pfaudler has been a leading supplier of corrosion-protected glass lined equipment and is considered a trusted partner in the industry. When looking for high-quality corrosion resistance in chemical processing, it's hard to go past the company.

Today, the GMM Pfaudler Group has a global presence with over 1800 employees* in 16 production facilities on 4 continents, supporting its customers and partners at the highest level.

BACKGROUND

As a global company with locations in Germany, Italy, Benelux, UK and the USA, Pfaudler was faced with the challenge of automating and optimizing the processing of incoming documents. The huge daily volumes of incoming papers and PDFs, which were previously

processed manually, meant an enormous amount of effort, lengthy approval processes and a high error rate.

Pfaudler therefore decided to look for a modern and intelligent solution to automate this burdensome and ponderous process to a high degree and streamline the workflows. Costs had to be massively reduced and efficiency significantly increased.It was important that the possible solution should not only meet today's requirements, but also those of the future. The throughput must be optimized in terms of time so that in the future the cash discount losses incurred will also be a thing of the past.

After an intensive evaluation phase, Pfaudler decided to implement DocBits, a state-of-the-art platform in the cloud for automatic AI-assisted document automation and processing. The task was clearly defined. All incoming supplier invoices and delivery bills were to be captured, digitized and automatically processed in the ERP (infor CloudSuite).

For this, the documents are scanned, read from email accounts or folders, or manually uploaded into the system via drag & drop. With the help of a powerful AI model, the document data is first classified and then extracted using OCR. Deep integration with Infor enables multiple data validations to ensure data validity.

DocBits

With the help of the manufacturer FELLOWPRO AG, the implementation of the software was extraordinarily fast and straightforward. In just a few weeks, Pfaudler was already able to go live at three locations. The visible successes underscored the decision and motivated other sites to also implement the solution in the short term. After a very short time, DocBits proved to be the right decision.

> *"Faster approval cycles lead to punctual payments to suppliers as well as the possibility to claim cash discounts. The cash discount advantage gained from this alone covers the cost of DocBits (SaaS)."*

Dr. Elisabetta Venezia, Director ERP

A key factor in the successful implementation of DocBits for Pfaudler was the seamless integration of the system with the existing Infor M3 and Infor IDM.

The Covid lockdown made the Pfaudler team realize once again that it is easier to have everything in the same place. Having documentation saved in context with the ERP transaction helps keep everything under control. After all, it is simply impossible for employees in the home office to take all documents home with them in order to work effectively.

BENEFITS FOR THE CUSTOMER

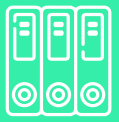## TIME SAVINGS
90% increase in document processing efficiency

COST SAVINGS
Through reduced manual effort and optimized processes

HIGHER ACCURACY
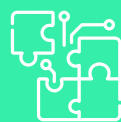More than 90% of data is extracted automatically

DIVERSE DOCUMENT TYPES
Supports a wide range of document types

EASE OF USE
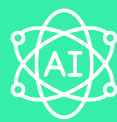Simple handling without technical know-how

SEAMLESS INTEGRATION
Smooth integration with existing systems, including Infor Cloudsuite, M3, and IDM

SCALABILITY
A solution that can grow with your needs

AI WITH ML
Intelligent technology without complex template creation

INTERNATIONAL SUPPORT
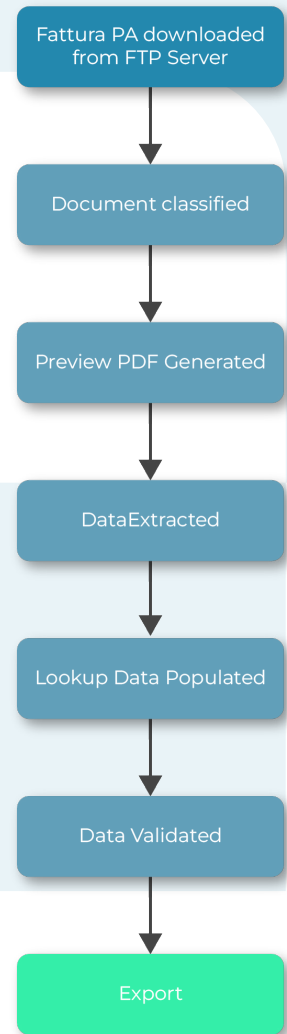More than 128 languages and international e-invoice

"Working with the FELLOWPRO team has been great. I believe we have established a good relationship and together we can develop more and more to get better solutions."

Dr. Elisabetta Venezia, Director ERP

In our engagement with Pfaudler, we successfully extended our services to their Italian division, incorporating the innovative DocBits solution. Our collaboration addressed the unique intricacies of the Italian invoicing process, which diverges from conventional methods. To comply with the stringent requirements set by the tax authority, all invoices within Italy must adhere to the Fattura PA XML schema format. The transmission of electronic invoices is orchestrated through the Sistema di Interscambio, acting as the conduit for this digital exchange. Once the clearance is granted by the tax authority, the authorized e-invoice is transmitted to the designated recipient. At this juncture, DocBits takes center stage by seamlessly transforming the XML data and strategically mapping it to facilitate secure and seamless integration with Pfaudler's Infor ERP system M3. This collaborative effort ensures that the complex Italian invoicing landscape is navigated with precision and efficiency, bolstering Pfaudler's operational integrity.

An all-around successful automation project, but it doesn't end here. Pfaudler plans to implement DocBits at other sites in the next two months and to include the import of other documents, such as order confirmations, customs documents and export declarations.

Fattura PA downloaded from FTP Server

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Document classified

↓

Preview PDF Generated

↓

DataExtracted

↓

Lookup Data Populated

↓

Data Validated

↓

Export

GMM Pfaudler

INDUSTRY
Manufacture of industrial machinery

ERP-HEADQUARTERS
Waghäusel (DE)

CHALLENGE
Process incoming supplier invoices and delivery notes automatically in Infor in just a few minutes or seconds.

SOLUTION

DocBits

for automation and processing of incoming documents