www.ufcinc.com

Case Summary

Halliburton, founded in 1919, is one of the world's largest providers of products and services to the energy industry. With over 50,000 employees in approximately 70 countries, the company serves the upstream oil and gas industry throughout the life cycle of the reservoir - from locating hydrocarbons and managing geological data, to drilling and formation evaluation, well construction and completion, and optimizing production through the life of the field. Using the data capture expertise of User Friendly Consulting, Inc (UFC, Inc.), Halliburton Energy was able to eliminate the possibility of clients retrieving the wrong sales documents and as an added benefit also made their entire sales order process more accurate and efficient.

The Opportunity

In the past, the sales division of Halliburton used an in-house custom application for scanning sales orders (called Field tickets) and then attaching those orders to the appropriate customer account. However, upon further review of the process Halliburton realized that there was not sufficient quality control in place to insure that the correct Field tickets were being attached to the correct customer. This had the potential to create embarrassing situations if the customer went to their web portal to retrieve documents and found documents that did not belong to them.

The UFC Solution

In order to eliminate the possibility of customers retrieving someone else's documents, User Friendly Consulting, Inc. (UFC) was asked by Halliburton to design an application, in conjunction with the Accounts Receivable department of Halliburton, which would correct the problem. After some initial analysis it was decided that the Prevalent data capture product Quillix, (UFC is a value added reseller of Quillix) along with some custom coding, could be used as a quality control mechanism to stop the attachment of incorrect forms to customer accounts. In order to accomplish this, the forms would use Optical Character Recognition (OCR) as the first step before the sales orders were attached to a customer account. This process would then match the sales order number and the customer name. If both were present the information would be compared with the data in Halliburton's SAP system and if there was a match the sales order would be committed to the customer account with no further steps needed. If only a name was found or no information was found at all it would be sent to be manually indexed and would undergo a quality control process to insure the right documents were being attached to the correct customer account. This not only made the data more accurate but it stopped those potential embarrassing incidents where the customer could pull down documents that did not belong in their account. It also improved the billing cycle and made the entire process more effective and more accurate.