THE CHALLENGE

- lack of automation and quality control
- inaccurate matching of sales orders to customer account information
- manual steps prone to human error

Case Study: Halliburton

HALLIBURTON REDUCES BILLING CYCLE, WHILE IMPROVING EFFICIENCY AND ACCURACY IN ACCOUNTS RECEIVABLE.

SUMMARY

Founded in 1919, today Halliburton 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 UFC Inc.®, Halliburton 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 CHALLENGE

Prior to working with UFC Inc., the sales division of Halliburton used an in-house custom application for scanning sales orders (called Field Tickets) and then manually attaching those orders to the appropriate customer account. Given a lack of quality control, complexity with the custom application and the potential for human error, Halliburton found that sales orders were often attached to the wrong customer account, creating inaccurate records and a poor customer experience.

THE UFC SOLUTION

In order to eliminate the complexity and ensure accuracy in matching customer accounts to the appropriate sales orders, UFC worked with Halliburton's Accounts Payable department to design a solution. UFC recommended the use of the Quillix™ data capture application, from partner Prevalent Software Inc. to prohibit the attachment of incorrect sales orders to the customer account and enforce the proper quality control mechanisms.

ACCURATE AND EFFICIENT

Halliburton now has the confidence that all records are accurate and is no longer concerned about the potentially embarrassing incident where a customer could retrieve inaccurate information online. The solution has not only ensured accuracy, but it has improved the overall billing cycle, making the entire process more efficient and accurate. Here's how it works;

1.) Leveraging Quillix data capture, Optical Character Recognition (OCR) is used to read the sales order form, as the first step before it is attached to a customer account. This process automatically matches the sales order number to the customer name.

2.) If a match is found, the information is then compared with the information stored in Halliburton's SAP® system, where a comparison of the sales order is made. If a match is found, the sales order is stored along with the customer information and no further steps needed.

3.) If only a name no information is found, the information is manually indexed and routed to a quality control process, where further scrutiny and action is taken.

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