



## Case Study:

# Beverage Bottling Manufacturer Uses Integration with Oracle IPM to Improve Accuracy and Compliancy with State Tax Audits

### **PARTNER:** DTI

### **CUSTOMER/INDUSTRY:**

Beverage Bottling  
Manufacturing

### **PRODUCTS**

Oracle Imaging and Process  
Management  
Kofax Capture

### **DTI Customer since**

1999

### **Departments using Solution**

AP  
AR  
HR  
Drivers Certificates  
Tax Certificates  
eMedia

### **Project Objective**

Keeping track of tax exempt certificates for state tax audits was time consuming due to extensive manual data entry, and as a result, errors were common. Fines for failing an audit can be substantial, which prompted this organization to take action to find a solution.

### **Client Business Challenges**

This client was unable to produce tax exempt certificates for many of their customers flagged in the system as tax exempt. This left the company exposed to possible fines and audit failures. File cabinets were used to store copies of the certificates, and due to mishandled and misfiled documents, locating these documents became difficult. As a result, employees productivity time was not spent in the most efficient manner.

### **Solution**

DTI modified this client's Oracle Image Process Management (IPM) solution to streamline the tax exempt research process. Customers with a tax exempt status are now given a pre-printed form with a barcode that represents their location by state. This form is faxed to the corporate office and Auto Imported using Kofax. Once Auto Imported, batches are

created and released into workflow while the image is filed into the IPM repository. The Kofax batch class reads the barcode and auto populates the date and state fields. The workflow packages are sent to one initial entry queue and the AR Tax Specialist selects the state where all the packages for that particular state will be displayed within the work list. The AR Tax Specialist keys the data from the image on the Tax Certificate into their Line of Business application. If any information is missing from the pre-printed form, the AR Tax Specialist can send an email to the customer using a preconfigured form that includes checkboxes to indicate what is missing. Once the email form is complete, the package is routed to a holding queue until





MANAGING CONTENT  
APPLICATION INTEGRATION  
PROCESS IMPROVEMENT

completed. This solution allows the client to track customers with multiple locations and manage certificate expiration dates. Audit reporting for this solution identifies customers flagged as tax exempt in the Line of Business system, but do not have an associated tax certificate image in the Oracle IPM system. This audit reporting option can be customized to client's needs and specifications.

### **Results**

This client has found significant operational benefits including, increased employee productivity by reducing the time it takes to research tax exempt certificates, passing state audits with accurate records management, avoiding fines, reducing paper storage and related costs with electronic document storage procedures. The AR Tax Specialist can now retrieve certificates using different search criteria from one single location.

**DTI Overview**...DTI has been delivering unique end-to-end Enterprise Content Management Solutions for more than 25 years. Improving client's business process efficiency and bottom line has been the core of our existence. With an exceptional track record of providing content management, workflow automation, ERP integration, capture, and records management, DTI delivers a unique mix of process improvement, services, and ongoing partner support.

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