



Managing Customer Maintenance with Ease

Achieving 96% Time Savings and Increased Data Integrity

Retail Industry - Case Study



Product
Customer Wizard

Company
Home Improvement and Lifestyle
Product Retailer

ERP System
E-Business Suite

Industry
Retail



A leading retailer moved from using three products to one Excel-based solution for maintaining customer data in Oracle EBS.

Keep reading to see how this change reduced errors and saved the business hundreds of hours every year.

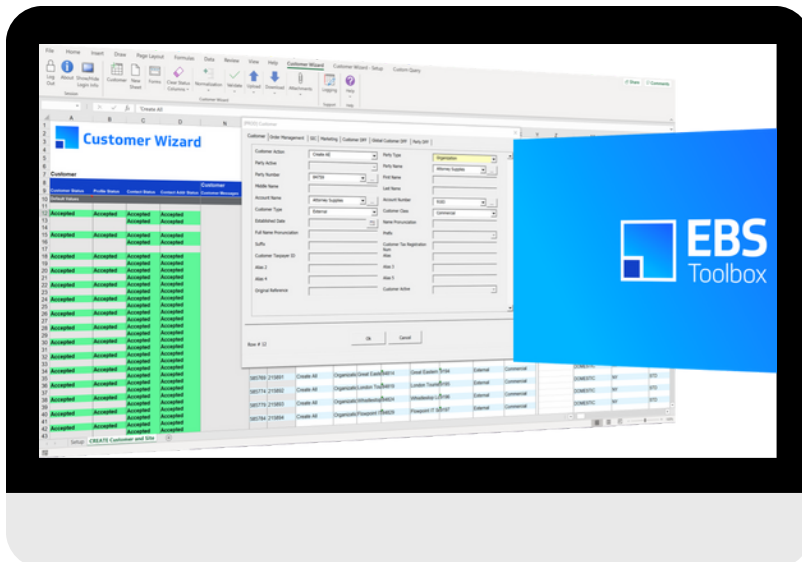
About the Client

Our client is a leading home improvement and lifestyle products retailer in Australia and New Zealand.



The company is also a major supplier to project builders, commercial tradespeople, and the housing industry and has been a More4apps customer since 2008 and uses ten products in the More4apps EBS Toolbox.

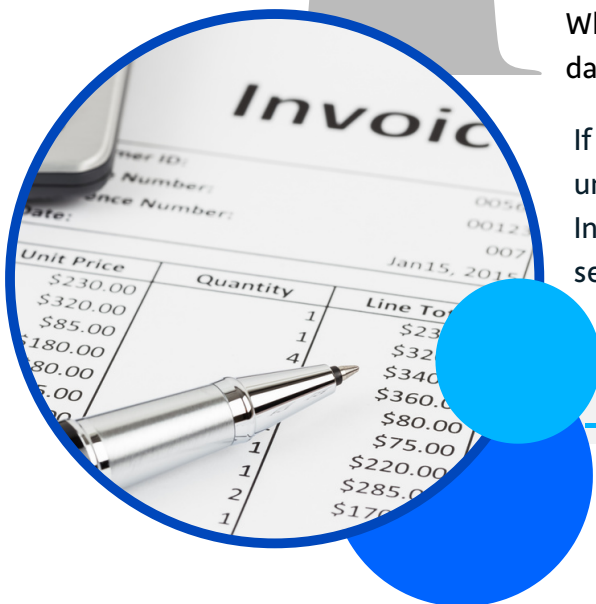
Resource-Intensive Tasks for Customer Maintenance Presents a Challenge



The Credit Control team is responsible for commercial customer maintenance in Oracle EBS. They process all customer data and invoices, which translates to massive amounts of data input and updates. They have many Descriptive Flexfield Attributes defined in EBS for customer records, customer profiles, profile amounts, and customized customer diaries.

While the team managing customer data is small, master data management is critical.

If their data is wrong, their commercial customers may be unable to get the materials they need for their work. Internally, AP and AR count on having accurate data for sending invoices and ensuring payment is received.



The Quest to Replace DataLoad

The team started using DataLoad Classic to manage customer data in 2007. In 2015, they moved to DataLoad Professional, which relies on HTML-based forms in Internet Explorer 11.

When our client needed to update information, they ran a discoverer report to extract customer details into Excel. After making the changes in Excel, they uploaded the customer data with DataLoad Professional. This process was complex as it involved screen macros that had to be closely monitored, required extra PCs, and caused network performance issues.

Most importantly, Internet Explorer 11 was being retired, pushing the retailer to find an alternative for data entry uploads. Their requirements for the new tool were:

- Low or no development work, ideally just configuration
- Fast implementation
- Easy to support
- No or little training
- Remove issues of network speed and response

The Solution:

Streamlining Data Input and Updates with More4apps

Considering the retailer is a valued More4apps customer, the company reached out to discuss their challenges with customer maintenance. More4apps demonstrated the EBS Customer Wizard to the Credit Control team and gave them a trial license to test the software in their development environment.

More4apps also provided support to accommodate the company's Oracle personalization and ensure that team members were confident in their ability to use the Customer Wizard.

The EBS Customer Wizard from More4apps is ideal for both migrations and ongoing maintenance of:

- Sites and site use
- Classifications
- Profiles
- Contacts
- Communication methods
- Banking details
- Credit and debit cards
- Attachments

“

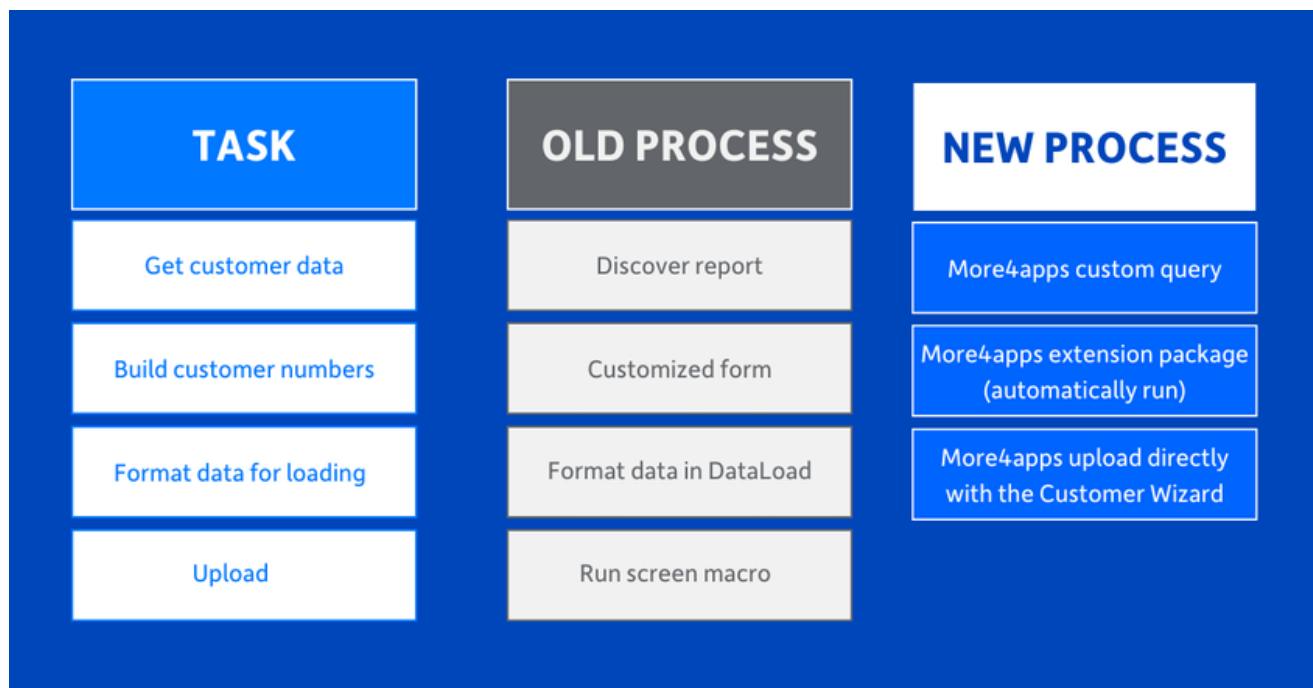
More4apps Sales and Support resources are great to deal with. The Support team is very knowledgeable, and we haven't had a technical or functional issue they couldn't solve.

-An end-user, Retailer



Our client quickly realized that the More4apps Customer Wizard met all their requirements. The software installation was simple, and the product integrates securely with Oracle EBS. The interface is intuitive, and everything happens inside Excel, allowing users to complete their work in a fraction of the time.

With the Customer Wizard, users can create a custom query and download customer details (including DFF Attributes) directly into their spreadsheet. From there, they can easily manipulate and validate the data before uploading the changes to Oracle.



The Result:

Stronger Data Integrity with Incredible Time Savings

By adopting the Customer Wizard, our customer eliminated the network performance issues and the need for script keystroke monitoring. With More4apps decreasing manual work and offering real-time data validation, fewer errors occur, improving data integrity for the business.

Best of all, the retailer can do everything with one product instead of three, with More4apps delivering astounding time savings:

- 96% less time spent on customer creation and profile class assignments
- 94% reduction in time devoted to monthly customer profile changes
- 87% decrease in time required for monthly updates to customer stop credits

Tasks that once took days and multiple desktops can be done on any PC in three hours or less. Our client saves approximately 29 hours every month, or nearly nine weeks of work per year!

Now that they spend less time on data preparation and keystroke monitoring, the retailer's employees have more time for higher-value tasks and a better customer experience.



The outcome was a very successful introduction of the Customer Wizard that eliminated multiple laptops used for DataLoad keystrokes processes that required constant monitoring, said one end-user.

Custom query in the Customer Wizard enabled the team to download customers, make the necessary updates in the spreadsheet, and upload. We're saving time and improving accuracy!



TASK	OLD PROCESS	NEW PROCESS
Uploaded 45,000 profile amount DFF attributes	Multiple desktops required with scripts staggered over many days and times	Upload background process function successfully completed in 2-3 hours
Changing a customer's profile on ~300 customers monthly	Download script monitored for 3 hours until complete	Upload complete within 10 minutes including worksheet preparation
Updating customers stop credit on ~1,400 customers monthly	Download script monitored for 5 hours until complete	Upload complete within 40 minutes
Changing customer account status on ~330 customers	Dataload script monitored for 1 hour until complete	Upload complete within 10 minutes
Customer creation and assigning profile class. 250 to 1,000 customers weekly	Dataload script monitored for 4 to 6 hours until complete	Upload complete within 10-30 minutes depending on the number of new accounts