



Fax Automation as a Cloud Service

Integrated with
ERP Solutions



Why Fax is Moving to the Cloud

Fax as a service

Adoption of cloud services for fax communication has steadily increased as organizations seek to reduce costs and streamline processes. Relative to faxing, businesses want to address:

- **Inefficiency of fax machines**
- **Hidden costs of fax servers**
- **Functional limitations of basic outsourced fax services**

Today, companies looking to integrate fax with their ERP applications no longer have to choose between efficiency, cost and functionality. As this white paper details, organizations can take advantage of fax as a cloud service without software or hardware, and without sacrificing security or ERP integration.

Leveraging its proven document process automation platform, Esker gives organizations the option to use 100% on-demand services for fax delivery. Fax Services for ERP combine the intelligence of patented Esker technology with a worldwide network, built by Esker and monitored 24/7/365, for sending documents via fax from enterprise and desktop applications. Fax Services for ERP enable enterprises to benefit from Esker automation technology throughout the organization without investing in and maintaining in-house telephony and fax hardware. With these services, fax jobs are sent to an Esker-hosted server for processing and delivery.

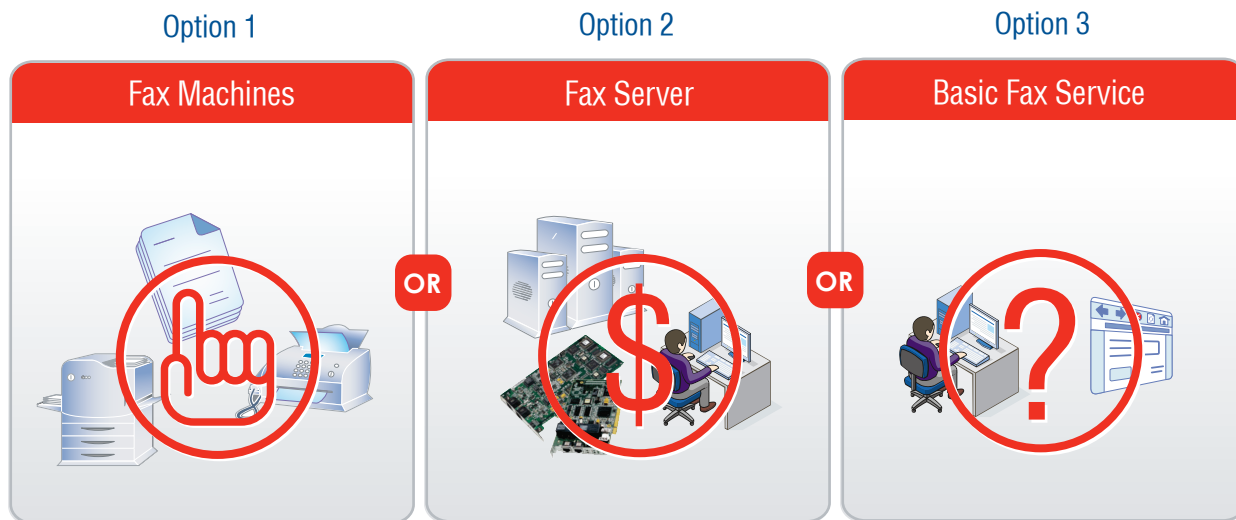
Fax Services for ERP are purchased in a pay-per-use model based on the actual number of documents transmitted, which is ideal for companies whose fax and mail requirements fluctuate monthly or seasonally. Peaks in document delivery volume do not require additional personnel or infrastructure. Fax Services for ERP also provide tracking status and delivery notification — capabilities usually expected only from a large enterprise mailroom or fax infrastructure.

Fax Yesterday

No ideal options for faxing out of ERP applications

Historically, the available options for integrating fax with ERP applications have forced enterprises to choose between efficiency, cost and functionality.

Relying on fax machines tends to burden enterprises with manual processes of printing and faxing, managing paper and other consumables, and maintaining equipment. Using a fax server product typically requires a major investment in software, hardware, fax boards and lines, maintenance and training. And, while a variety of outsourced fax services are available, many offer only basic capabilities that do not include integration with ERP solutions (which requires users to learn a new interface) or real-time status notification so you can track fax communications.



- Printing
- Faxing
- Wasting paper
- Consumables cost
- Maintenance of equipment

- Hardware
- Software
- Fax lines
- Maintenance
- Training

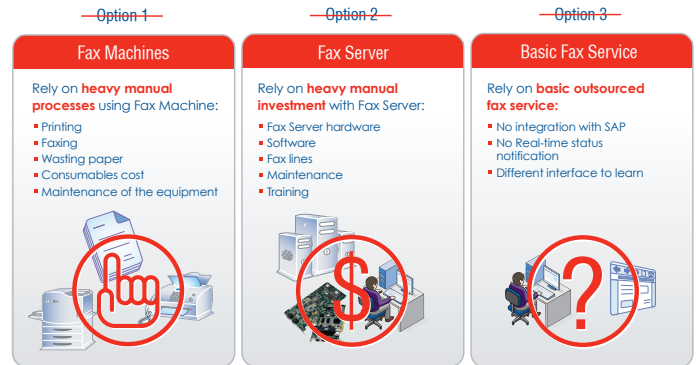
- No ERP integration
- No real-time status notification
- Different interface to learn



Automatic faxing through the Esker on Demand cloud service

Today businesses running ERP systems have another choice. It is a solution that delivers the benefits of automatic faxing as a fully integrated, on-demand service offering fax status management within the ERP environment.

Best of all, no fax server software or hardware is required on your site because the infrastructure is all hosted by Esker. Your company can connect directly to the service and integrate faxing with your ERP applications — securely and efficiently, leveraging standard communication protocols. Real-time fax communication status is communicated back to the ERP server, and the service provides a Web interface for monitoring fax delivery and reporting on fax traffic. In addition to outbound faxing from ERP applications, the service can also handle inbound fax.



Key benefits

Fax Services for ERP offer:

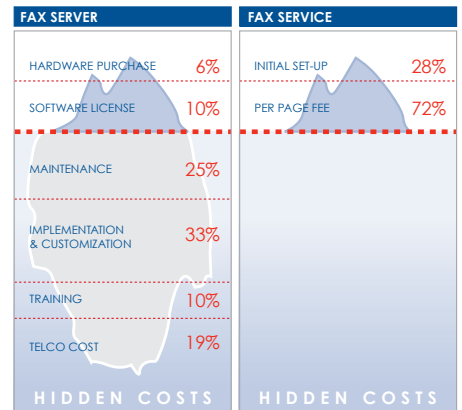
- The ability to fax directly from ERP interfaces
- Production faxing from ERP solution modules
- No hardware or software to buy and maintain
- Quick and cost-effective global deployment of fax with a single instance of an ERP application
- Real-time notification within the ERP system for all faxes
- Almost no up-front investment necessary and minimal operating costs
- Fax capability available 24 hours a day, 7 days a week, 365 days a year
- Virtually unlimited capacity to handle any fax volume
- Least Cost Routing through the redundant and secure worldwide network of Esker-hosted fax production facilities

And companies gain all of these benefits with pay-as-you-go cost efficiency as a result of moving fax communication to the cloud service model.

Comparing fax costs

Fax servers do not always give you a clear picture of fax costs. On the surface you know what your hardware and software licenses are costing. But below the surface there are other costs that are not as predictable, such as the costs of maintaining hardware and software, implementing and customizing the solution to meet your specific requirements, training users, and telecommunications.

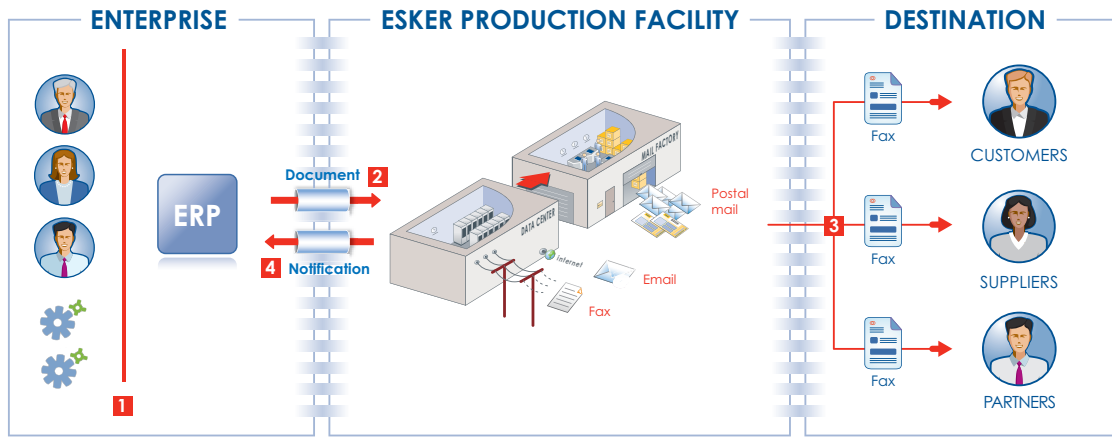
On the other hand, with fax as a cloud service all your costs are straightforward and predictable. You always know what your company is spending on fax communication — what you see on the surface is all you will pay for.



How Cloud Faxing Works

Simple in principle, powerful in practice

The principle behind Fax Services for ERP is simple. Users submit faxes from the ERP application interface, or faxes can be submitted automatically from ERP solution modules. Then the documents are transferred to an Esker production facility through a secure channel. Once received, the documents are processed and faxed according to user specifications, and notification is directly fed back into the ERP system so users can follow the status of their faxes.



Advanced technology at your service

Fax Services for ERP leverage patented Esker technology to integrate with leading enterprise applications including ERP, CRM, SCM, and other systems. As electronic documents and data are submitted to the service, the Esker on Demand platform automatically recognizes and extracts data to determine formatting, conversion and routing actions that must take place, as defined by business rules.

Users of the service can simply create a message, attach files to be faxed and select fax number(s) from the recipient list. There are no traffic or volume restrictions, so you can easily handle peak-volume fax jobs such as monthly invoicing.

Mail on Demand

Because most companies also need to send business documents by postal mail, Esker offers on-demand services to transform electronic documents into postal mail without the need for mailroom equipment or fax hardware. Many companies use this solution to automate the sending of documents like invoices to customers who prefer to receive by traditional mail.

Documents are securely submitted by the user from the ERP interface or automatically from ERP modules to Esker production facilities. There the mail pieces are automatically printed, folded, inserted, stamped and sent out the same day. Global least cost routing capabilities are available with Esker mail services as well, which helps to minimize international postage costs, and you have visibility of your mailings with status updates available from within the ERP system.

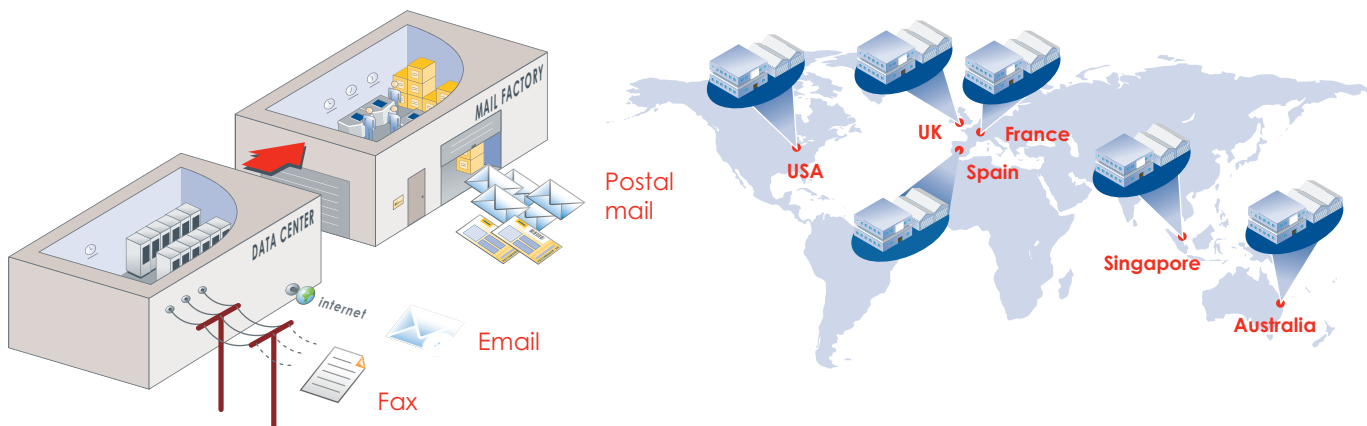
Esker on Demand Infrastructure

A secure global network

Esker on Demand production facilities are built for secure, dependable, confidential and traceable data processing. The Esker network includes strategically located facilities worldwide, which offers a high level of reliability, scalability, flexibility, and availability to help organizations overcome the challenges and expense of dealing with high-volume document delivery. Data centers located in North America, Europe, and Asia-Pacific are monitored 24/7 to deliver continuous service.

Along with level 1 operational support, the Esker on Demand emergency team is ready to intervene 24x7x365 — ensuring data security and service continuity.

Data is transferred using SSL — identical to the encryption used for banking transactions. Esker server platforms use high-availability cluster technology that provides internal redundancies to counter any possible hardware failure. The platforms in North America and Europe are capable of backing up one another for minimal production interruption. And Esker uses a system of dynamic line allocation to ensure there are no delays in the delivery of your faxes based on your service contract.



- Backup and monitoring between data centers to ensure 24x7 availability
- Data transfer by secure protocol (SSL)
- Clustered servers with internal redundancies to prevent hardware failure
- Dynamic line allocation and routing to prevent contractual delays
- Security guaranteed

Where Cloud Faxing Offers Value

Simplify deployment of reliable fax

Fax Services for ERP are almost always less expensive and easier to manage than other faxing options, so just about any organization can benefit. Working with businesses in a variety of industries, Esker has identified several scenarios in particular where this solution works best. For example, when you are replacing a fax solution that is no longer supported, or if your fax server does not have the right licensing for the most recent version of your ERP solution. Also, this service can simplify fax integration if you are just starting out with an ERP solution or getting ready for an upgrade.

Consider Fax Services when you are:

- Replacing unsupported fax systems
- Current fax server not licensed to work with the latest version of your ERP system
- Getting started with an ERP solution
- Upgrading ERP applications
- Also in need of email and postal mail services
- Moving from a distributed ERP architecture to a single global instance
- ERP instances on multiple continents either faxing manually locally or using various fax servers
- Move to a centralized solution for outbound faxing globally that is in alignment with ERP strategy
- Rolling out ERP implementation to regional subsidiaries
- Looking to try cloud faxing with minimal investment

Implement quickly, without risk

Fax Services for ERP are ideal for organizations looking for a solution that is rapidly delivered, offers the advantages of fixed costs and is flexible enough to satisfy changing needs.

Global deployment for single-instance environments

A situation in which Fax Services for ERP fit particularly well is when a company is making the transition from a distributed architecture to a single instance globally. Esker has seen excellent results in situations such as a company running its ERP system from the U.S., Europe or Asia, for example. Typically, each destination either faxes manually locally or they have various fax servers with least cost routing. Then they move to a single instance globally and can have a centralized solution for outbound faxing globally that is in alignment with their ERP strategy.

Along with the value of not having to build and maintain fax infrastructure, one of the most appealing aspects of a Fax Services solution is that it gives companies the opportunity to try cloud faxing in their environment without taking on risk or making a large investment. It's a practical way to get the benefits of automated faxing immediately, which can help to simplify a complex situation like a global ERP rollout.

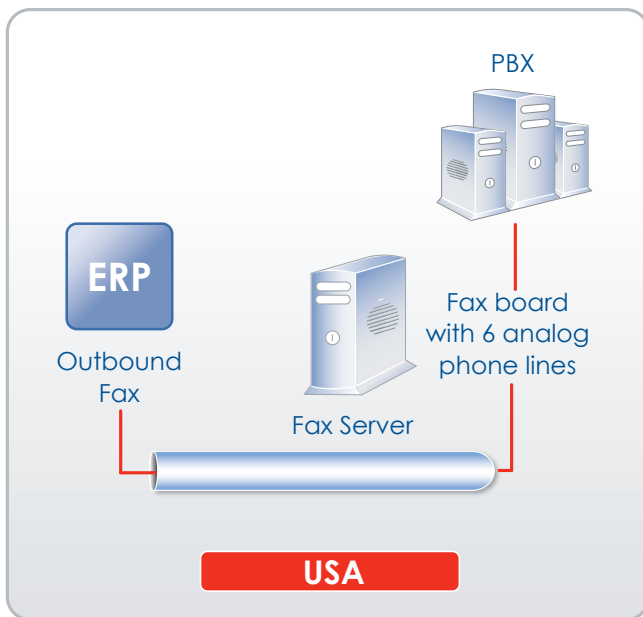
Customer example

To automate delivery of documents within the procure-to-pay cycle, a leading manufacturer of equipment for the global construction industry chose Fax Services as part of its core ERP implementation for the United States and European subsidiaries. According to one of the company's project leaders, "We were looking for a solution that would be quick and easy to put in place. We have a wide range of requirements, and we wanted the solution to be adaptable to our needs. Esker was a good choice for us." The solution provides a web client for monitoring fax delivery and reporting on fax traffic, and fax status is communicated back to company's ERP server.

Case Study: Pentair, Inc.

Before

Pentair, a 40-year-old, \$3 billion global manufacturer of industrial water pumps and water filtration equipment, with subsidiaries in Europe and Australia, had problems with reliability of the fax server product it had been using for several years to send purchase orders to vendors. The product was at end of life and the infrastructure not stable. Pentair's environment of multiple fax servers and associated fax boards around the world was difficult to support and expensive to maintain, and visibility for fax administration was low. Eventually fax queues began to get backed up and vendors were regularly reporting partial faxes. Fax server failures were a time-consuming pain for Pentair's ERP administration team, who often spent late nights on the phone with Europe and Australia trying to resolve issues of global users being unable to fax invoices, statements and POs from the ERP system. Delivery of POs to vendors was disrupted and delays rippled through the supply chain, which interrupted business processes and affected Pentair's ability to ship on time to customers. This system instability ultimately caused Pentair to hire temporary employees to fax manually. When it came time to upgrade its ERP system, Pentair decided it no longer wanted to host fax telephony and hardware.



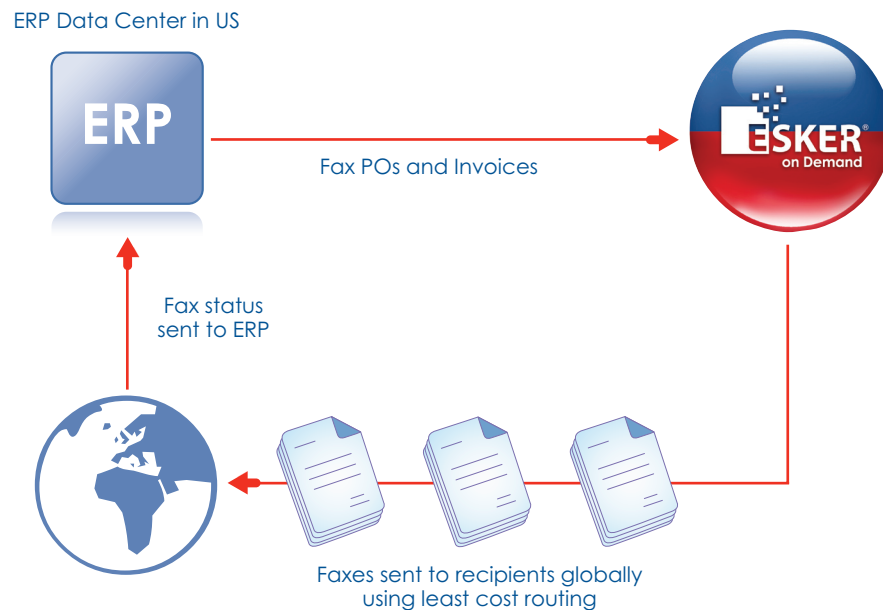
- Fax status not updated in ERP
- No notification of fax failures
- Faxes frequently delayed due to marketing sending bulk faxes (up to 40,000 at a time)



After

A main objective of Pentair's business case for its project was reduction of TCO associated with running and managing assets to support global faxing, and the Esker on Demand fax service offered as a solution was appealing for scalability to support Pentair's growth while eliminating burdens of managing domestic and international fax infrastructure. The project was completed under budget and ahead of schedule, and Pentair was quickly up to sending 20,000 pages per month through the Esker fax service. The change was transparent to their business community — except that there were no longer issues with late or incomplete faxes. With the built-in delivery status notification feature of the solution, users can resubmit by themselves if a fax does not go through. And it is easy to monitor and resolve any fax administration issues that may come up.

Now, the company's technology people have more time to focus on the business instead of maintaining servers. Pentair no longer has to deal with the time and expense of buying and maintaining fax lines, fax boards and multiple servers across the globe. The company had originally planned to use the Esker service for outbound faxing only, but eventually expanded it to all faxing. Along with the functional benefits it gained, Pentair calculated that it saved \$42,000 by going with the Esker service instead of the upgrade and reimplementations of five fax servers with fax boards that was proposed by the fax server vendor.



Results

- Fewer fax-related help desk requests
- Faster delivery of POs to vendors to help meet customer fulfillment requirements
- On time delivery of inventory
- No need to add headcount for supply chain communication support
- Notification to sender if a fax fails
- \$42,000 savings versus fax server solution considered
- Project completed ahead of Pentair's schedule and under budget

About Esker

Document process automation leadership

Esker is a recognized leader in helping organizations reduce the use of paper, eliminate manual processes and simplify IT landscapes. With its comprehensive platform, Esker delivers the benefits of automated document processing as cloud services (SaaS) and on-premise solutions. Customers achieve significant operational efficiencies, cost savings and ROI in as little as three to six months while gaining visibility and control within order-to-cash and procure-to-pay business processes ranging from sales order management and accounts receivable to purchasing and accounts payable.



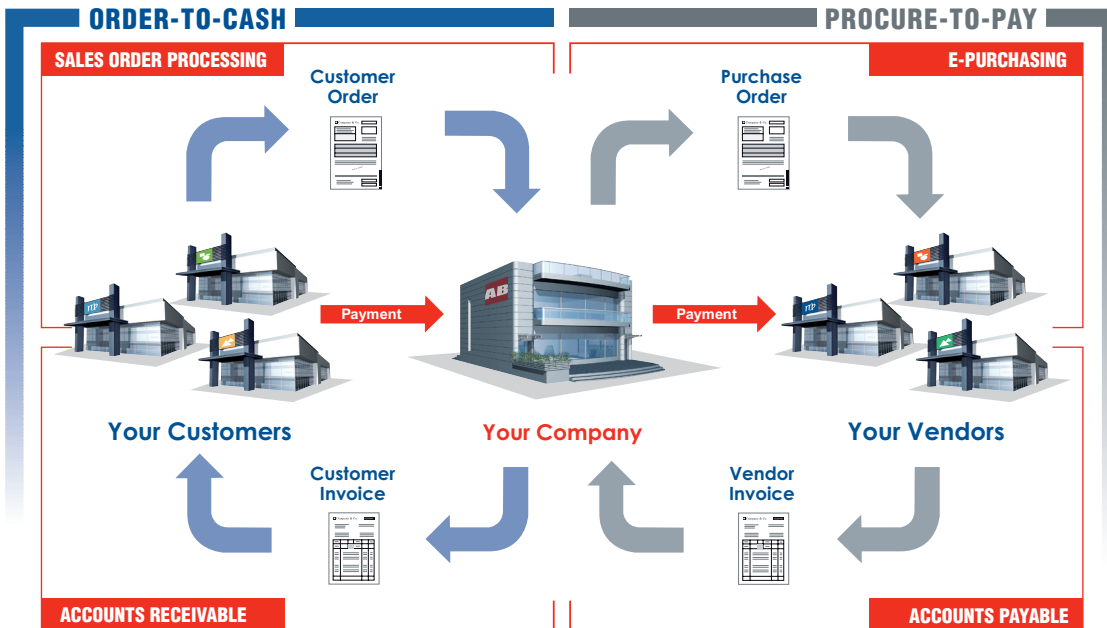
Founded in 1985, Esker operates globally with more than 80,000 customers and millions of licensed users worldwide. Esker has global headquarters in Lyon, France and U.S. headquarters in Madison, Wisconsin. For more information, visit www.esker.com. Follow Esker on Twitter and join the conversation at twitter.com/eskerinc.

One platform for all processes

Procure-to-pay and order-to-cash

To help organizations quit paper and automate business processes to speed cash conversion, enhance customer satisfaction, improve supply chain performance, and increase profitability, Esker solutions span the order-to-cash and procure-to-pay cycles:

- **Sales Order Processing** to automate entry and routing of incoming customer orders
- **Accounts Receivable Invoicing** to automate processing and delivery of billing documents based on customer preferences
- **Accounts Payable Processing** to automate entry and routing of incoming vendor invoices and other payables
- **E-Purchasing** to automate processing and delivery of supply chain documents based on vendor preferences





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