



## Tech Data Corporation

Increasing flexibility with virtualized automation of sales order processing



Tech Data Corporation (NASDAQ GS: TECD) is one of the world's largest distributors of technology products from leading IT hardware and software producers. Tech Data serves more than 125,000 IT solution providers in over 100 countries. Every day, these value-added resellers depend on Tech Data to cost-effectively support the technology needs of end users, including small and medium businesses (SMB), large enterprises and government agencies. Ranked 102nd on the FORTUNE 500®, Tech Data generated \$24.1 billion in net sales for its fiscal year ended January 31, 2009.

### Highlights

- Automated sales order processing with Esker DeliveryWare
- Fax over IP with Dialogic® Brooktrout® SR140 Fax Software
- Virtualization of the Esker solution environment

## Challenges

### Improve sales order process automation

On a global scale, Tech Data processes more than \$90 million worth of IT purchases every day, with an average order size of less than \$1,000. That immense order volume is supported by a world-class transaction system backed by a team of in-house IT professionals always looking for ways to improve the company's execution through new processes and IT tools.

One opportunity for improvement centered on Tech Data's practice for processing purchase orders received via fax and email. The company already had extensive automated processes in place for orders, such as EDI and through its online sales portal at [www.techdata.com](http://www.techdata.com), but many customers still prefer to submit POs via fax or email. Tech Data sales reps then had to reenter this data to complete purchases. The opportunity to reduce cycle time and touch points was clear. Tech Data turned to Esker for a solution.

"It was clear that Esker DeliveryWare offered functionalities that would enhance our operations," said Ted Strand, Systems Specialist at Tech Data. "About that time, our EDI team got involved and thought Esker DeliveryWare might be a good 'EDI light' solution for accounts that are not set up for full EDI but a more automated solution would benefit Tech Data and our customers."

## Strengthen continuity and recovery

Tech Data also sought to move to Fax over IP to address challenges of business continuity and disaster preparedness for faxing with digital fax boards. "Recovery with traditional faxing with PSTN boards required a lot of back-end infrastructure," said Strand. "An IP solution is more cost-effective and less complex than some of the traditional alternatives."

## Solution

### Esker DeliveryWare

Tech Data did its due diligence in selecting its new fax solution that would complement and integrate well with its systems.

"The consensus was that Esker delivered what we needed and would enhance our existing operation," said Strand. "Along with the 'EDI light' function, we use the Esker platform for inbound and outbound faxing. We also have a system for faxing purchase orders to vendors from our mainframe environment using the Esker APIs."

### Dialogic® Brooktrout® SR140 Fax Software

To support high availability, Tech Data replaced T1 fax boards with Dialogic Brooktrout SR140 Fax Software to work with its mixed VoIP system. Tech Data virtualized the Esker DeliveryWare and Brooktrout SR140 environment to address disaster recovery.

"This system gives us the opportunity to really be flexible in the recovery environment. When I saw that the capability to virtualize the machines was available, it was added functionality we were excited to employ," said Strand.

**Our entire Esker environment now is virtualized, thanks to Dialogic and the Brooktrout SR140 software.**

Ted Strand ▪ Systems Specialist ▪ Tech Data Corporation



We're seeing greater proficiency in our sales team to get orders processed quickly.

Michelle Graham ■ Senior Developer ■ Tech Data Corporation

## Benefits

### Document processing efficiency

Esker DeliveryWare receives incoming "non-EDI" orders and displays captured data in a user form for validation. "We have customers sending us orders in several different formats — XML, email content, TIFF, PDF and spreadsheets," said Michelle Graham, Senior Developer at Tech Data. "These are converted to X12 and sent to our back-end processing system."

By automating both the capture of order information as well as routing of the documents, Esker DeliveryWare keeps documents electronic throughout their entire lifecycle. Esker DeliveryWare OCR and content recognition capabilities transform fax images into searchable documents and automatically extract data for order processing and archiving. Business rules govern the routing of documents to applications and among the sales and order fulfillment departments. Esker DeliveryWare also provides reporting capabilities to help give Tech Data an accurate view of how revenue is being generated.

"Not only are we seeing gains in efficiency, but we're also getting great response from our sales reps using the system," said Graham. "We're processing faxed orders faster through the Esker Document Manager, improving service levels to customers and internal stakeholders."

Strand added, "Probably the best aspect of the Esker solution is its flexibility. We have the power to do a lot of different things."

### Fax uptime

With the Dialogic Brooktrout SR140 Fax Software, Tech Data's transition to IP was transparent to users. Along with helping to ensure business continuity, virtualization delivered valuable advantages from a systems perspective.

"Being able to virtualize the machines means now I can recover them in minutes," said Strand. "And that's really important to us. With a physical box that's not the case. I would need to have special procedures in place to get it backed up or imaged, which is difficult. We also don't have the occasional loss of connectivity between the PBX and fax that we had with the T1 boards, so we've seen a lot of uptime increase by going with the SR140."

According to Strand, Fax over IP and virtualization deliver many "hidden" benefits that create value. For example, "If the server or even the OS fails, the reboot time is extremely fast," he said. "And with the high availability on top of our Virtual Server farm, if one of the physical hosts starts having a problem or has utilization constraints, it will be automatically moved."

### Return on Investment

Tech Data has realized exceptional results utilizing the system, including:

- Reduction of fax servers from 7 to 2 with no need to have a fax server for each geographic location
- Increase in faxed orders processed per day
- Fewer errors
- Resources freed for more critical tasks
- Convergence on one network for voice, fax and data
- Centralized fax administration with gateway access to PSTN
- IT consolidation and reduction of idle fax resources
- Disaster preparedness

### Future plans

"We're continuing to roll out the order processing to more accounts, and we may be expanding it to regions outside the U.S. in the future along with FoIP," said Graham. "We're also looking at using the configuration to process other pieces of information from documents."

## Dialogic

Dialogic Corporation is a leading provider of world-class, innovative technologies based on open standards that enable innovative mobile, video, IP, and TDM solutions for Network Service Providers and Enterprise Communication Networks. Dialogic's customers and partners rely on its leading-edge, flexible components to rapidly deploy value-added solutions around the world.

Dialogic® Brooktrout® SR140 Fax Software provides Fax over IP (FoIP) capabilities for integrating fax servers and fax document management solutions with VoIP networks.

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