frevvo

MEDI USA ACCELERATES DAY-TO-DAY BUSINESS THROUGH WORKFLOW AUTOMATION

- **medi has a wide variety of product lines with lots of sales reps in the field.**
- **Manual sales processes were slowing their business down.**
- **Starting with their Customer Credit App and Sales Contract processes, medi is automating their routine workflows, integrating them with ERP, and using e-signatures to avoid printing.**
- **Faster processes and fewer errors are already benefiting the company.**

Customer Profile: medi is a leading and cutting-edge manufacturer of medical aids, sports textiles and fashion products that combine precision effectiveness with maximum comfort.

Business Situation: medi has a wide variety of product lines, is diversifying rapidly and has a number of Sales Reps in the field. Customer would submit a manual Credit App form. medi had to correct illegible/invalid fields and key the data into their ERP. They also had a completely manual Contract process using email that required employees to print, sign and scan for approval. The processes were inefficient and slow.

Solution Summary: medi came to know frevvo through a referral and decided to try workflow automation. Like many frevvo customers, medi's I.T. resources are overloaded with other critical projects and they find it hard to hire people with mobile app-development skills.

> "frevvo's Cloud-based solution is visual and easy to use yet has powerful business features and integration with our ERP.
>
> frevvo has a great combination of simplicity and flexibility."
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> **Tim Horkey**
> **Chief Financial Officer**
> **Service Owner**

Using frevvo's low-code, visual solution, medi automated their Credit Approval in weeks. It's already been updated with user feedback and integrated with medi's Infor VISUAL ERP system. When a customer wants to buy, they use the e-form, the data is automatically validated and imported.

medi decided to then automate the Contracts process. Instead of emails & faxes, printing & signing, the frevvo workflow streamlines the process with e-forms that route through a traceable process electronically collecting the necesssary approvals and signatures along the way. Ultimately, the workflow generates a binding contractual agreement as a PDF with the necessary signatures and sends it to all stakeholders.

Benefits:
- The Credit App and Contract processes are both significantly faster.
- Customers and Sales Reps easily complete applications and approvals without errors.
- Integration with Infor VISUAL ERP has eliminated duplicate data entry.
- Using frevvo, it's fast and easy to design, deploy and update workflows to solve business issues.