



iBOLT for SAP Business One Helps CB Medical to Automate Work Flow and Improve Customer Service for Special Needs Community

“Magic Software’s iBOLT for SAP Business One has provided CB Medical with an effective method to solve this complex problem. Inefficiencies will be eliminated, errors have been reduced significantly and staff can now spend their time on improving quality and customer service.”

Steve Blackburn, Coastal Range Systems Inc.

The Customer

CB Medical Inc. is an Alberta based Government vendor specializing in the supply of products and services to the special needs community.

The Challenge

Many of CB Medical's special needs customers are eligible to subsidies from the Alberta government when purchasing a variety of goods. However, until now creating a customer invoice was a tedious process that involved a number of repetitive and redundant steps. For example, when a purchase is made, first the correct subsidy needs to be calculated for the item being bought. This is not a simple process, with eligibility being based upon a complex list of criteria including patient age, income, subsidy limits and many more. Once the subsidy amount has been determined, then an invoice for the offset balance must be created and delivered to the Alberta government for payment.

Back at CB Medical, employees have to maintain large excel files to track patients purchases, and to determine if purchased items should be charged to the government or not.

This meant an extra service invoice needed to be sent to the government while government and customer charges would need to be balanced out into two separate invoices.

All in all, the combination of these tasks required considerable time and effort from the employees of CB Medical, with the chances of error high the time for claims completion and delivery long.

The Magic Software Solution

Coastal Range Systems chose Magic Software's iBOLT for SAP Business One to be installed at CB Medical along with SAP Business One.

iBOLT allows you - without the need to write code - to extend the capabilities of SAP Business One, SAP Business All-in-One and SAP ERP R/3.

It creates links that facilitate the sharing of information between SAP Business One and diverse software or applications, including email and websites.

iBOLT also creates real-time workflows triggered by actions within or external to SAP to ensure that the desired business processes are fully implemented.

iBOLT was used to facilitate the automatic creation of invoices and claims to be sent to the Alberta's provincial government.

Case Study



iBOLT was installed on the server and today consistently monitors the transactions created in SAP Business One. iBOLT determines which item rows from a newly created invoice should be proportionately charged to the government. The Data Mapper component then takes care of the manipulation of the data, converting the item type to a service type invoice and adjusting the charges. This automated flow means that CB Medical's staff no longer has to worry about calculating the various subsidies. Neither do they have to create the government service invoice. Both are now automatically determined and delivered.

Once a government invoice is created, it must then be aggregated to a text file and submitted to the government as a batched claim.

Within iBOLT this process is now triggered by an incoming email which leads to the processing of the invoices, and a single text file that is created and sent back to the requester via email.

At the end of every week CB Medical staff email the iBOLT system and promptly receive an attached text file ready to be forwarded as a complete claim to the Alberta provincial government.

iBOLT has enabled CB Medical to synchronize and automate a number of processes, that until today, had to be performed manually.

The Benefits

All in all, the installation of the iBOLT business integration suite has saved the company considerable time and money and created greater process optimization and efficiency. iBOLT has enabled CB Medical to synchronize and automate a number of processes, that until today, had to be performed manually. With an automated business process that manages exceptions in these processes, and allows CB Medical's staff to monitor them, iBOLT ensures that the company's special needs customers get exactly what they need, when they need it.

With the use of the iBOLT along with the installation of SAP Business One, inefficiencies resulting from multiple and redundant data entry have now been eliminated and human errors have been significantly reduced in parallel.

Also important to the company, the installation of iBOLT means that staff resources can now be re-directed to focus on customer service, reducing patient waiting times and making the subsidy process that more accurate and trouble-free. With the implementation of SAP Business One, the quality of the information available to staff has also improved allowing customer agents to provide a better service to patients.

