

Global Insurance and Investment Company

What does the company do?

A global company offering a variety of insurance, investment, risk management, and travel assistance services.

What does CoreIntegrator do for them?

CoreIntegrator is at the heart of this company's financial systems. From a variety of PO and Non-PO workflows, to PO matching and New Vendor Workflows, CoreIntegrator has made a major impact on how information flows through this company and its subsidiaries. CoreIntegrator is also the backbone behind the GL Account Generator workflow – this works together with the invoice approval workflow. This allows them to create GL accounts on the fly and allows time to be saved because they do not need to jump from one software/environment to another.

How do we make their life easier?

We've been able to help this company solve some serious issues by implementing a unique invoice approval process. With the Invoice Approval workflow, they can manage over twenty departments, each with its own workflow path. This is important because previously, there was overlap between departments and it was causing issues. Now, they can manage departments, finetune their approvers and keep all parties informed while avoiding the issues that were previously impeding their efficiency