



SMS Automates Utility Bill Data Extraction with PSI:Capture

Company Background

SMS is one of the energy industry's most innovative companies. Over the last 14 years it has developed and delivered utility and energy services to energy industry and corporate clients saving millions of pounds in costs as well as valuable time. SMS is the only UK service provider of utility infrastructure, smart metering and energy services offering a complete and fully integrated management solution. With its headquarters in Cardiff, the company's aim is to help customers make sense of the complicated utility environment. It provides a broad range of services covering the entire utilities connections process, from feasibility to energy management, using its experience and knowledge of the utility and energy markets to deliver the right solution for its clients.

The Problem

SMS receives thousands of utility invoices from its clients every month for analysis. All the information on these invoices needs to be imported into their management system for analysis. The amount of data that has to be captured from each invoice is considerable, over 30 pieces of data in many cases, which created a bottle neck in the process because data had to be manually keyed into their system.

The Requirements

The company needed a system to automatically extract data from these invoices, upload it to their systems for analysis and create an electronic copy in PDF format that could be stored safely on their server for retrieval if needed. They approached their print management provider, Blue Sky Digital, who recommended Datafinitivity.

The Solution

Datafinitivity set up a detailed proof of concept for SMS to demonstrate how the system would work and be able to deliver the time and cost savings they were looking for. Following this, SMS chose the PSI:Capture intelligent document and data capture solution. PSI:Capture provided all the capability the company needed to rapidly extract data, both summary and line item detail, from a variety of client utility invoices and other documents.



| Document Index Fields | |
|-----------------------|---------------|
| Account Number | 100000-100114 |
| Meter | 1204467 |
| Date | RT40 |
| Statement Date | 25/11/2013 |
| Previous Date | 25/10/2013 |
| Present Date | 25/11/2013 |
| Previous Read (KWH) | 32747.25 |
| Present Read (KVA) | 2.05 |
| Present Read (KWH) | 33415.11 |
| Multiplier | 00 |
| Usage (KWH) | 53426 |
| Usage (KVA) | 164.0 |
| Billing Rate (KWH) | 3.590 |
| Dialing Rate (KVA) | 1406.1 |
| Charges (KWH) | 207,820.70 |
| Charges (KVA) | \$240,543.68 |



Incoming utility invoices are scanned on a Canon MFP and imported in PSI:Capture for processing

PSI:Capture classifies the invoice type, applies the appropriate template and extracts all the data from each invoice

Data is exported into Excel format and imported into a Bill Analysis Database. Scanned documents are converted to PDF

“SMS process a large amount of hard copy and scanned utility invoices in the preparation of service mobilisation and also on a continual basis to support our Bill Validation and Recoveries services. The software provides a significant benefit to SMS as we previously had to mobilise a substantial work force so that all data from these formats can be input into our analysis database manually. The resulting database allows SMS to identify exceptions so that a reduction of utility costs can be provided to the client on a continual and historical basis”

Martyn Atack, Utility Portfolio Manager, SMS Ltd.

SMS have been benefitting from the productivity gains provided by Datafinity’s PSI:Capture solution for over a year and are continuing to deploy the solution on new projects where significant manual effort to capture data would have been needed previously.

Solution Components in Summary

| | |
|---------------------|---|
| Capture Software: | PSI:Capture with Advanced Data Extraction |
| Output Formats: | Text-searchable PDF and CSV data file |
| Content Repository: | Network folders |
| Business Systems: | In-house analysis database |
| Scanner: | Canon Multi-function Printer |

About Datafinity Ltd

Datafinity delivers cost-effective, leading-edge document management and data capture solutions for companies that need to improve the efficiency of business and document processes within their organisation. By providing a combination of innovative market leading technologies and years of experience in document management solutions, Datafinity can help improve efficiency, save cost and enhance customer service whilst achieving a fast return on investment.

About Blue Sky Digital Ltd

Founded by Neil Brewer and Ian Brewer Blue Sky Digital Solutions is at the forefront of the new wave of document creation, storage and retrieval solutions. With many years of experience they have gained an excellent reputation for promptness and integrity. Blue Sky Digital is an independent company that offers independent advice combined with a personal service which is rare in the IT market today.

About PSIGEN Software, Inc.

PSIGEN is the innovative leader in advanced capture applications, and helps organisations convert content into managed digital assets. Their largest customers include service providers, business process outsourcers, and major corporations with significant customer concentrations in financial services, healthcare, manufacturing and retail.