



Enhancing Workflow with VBA Commands:

**How One Workflow and Data Management
Company Automated Tasks Using Foxit PDF**



ANONYMOUS CASE STUDY

A global leader in data management and workflow automation faced significant challenges managing and automating document workflows.

To address these challenges, the company turned to Foxit PDF, an innovative software-as-a-service (SaaS) provider that offers products with a range of functions, including the ability to integrate Visual Basic Applications (VBA) commands—lines of code used for automating repetitive tasks—seamlessly into workflows.

Since adopting Foxit, the organization has experienced countless benefits, including workflow efficiency improvements, reduced manual processing time, fewer errors, and timely generation of important financial documents. These have led to improved client and stakeholder trust and higher revenue.

About The Workflow And Data Management Company

The workflow and data management company is a leader in providing advanced technologies. It focuses on innovation and provides tailored solutions for streamlining operations. In addition to streamlining work processes, the company helps its clients focus on their goals and reduce unnecessary tasks, offering them customized and scalable systems.



Challenges Faced By The Workflow And Data Management Company When Transitioning To A New PDF Solution

When considering transitioning from a competitor's PDF solution to a new tool, the organization faced two main challenges.

First, it faced a significant financial outlay for upfront licensing costs and ongoing maintenance fees. Second, its fund administrators needed to generate, organize, and store daily reports for multiple funds—a time-consuming process prone to errors. This compromised the reports' accuracy and, by extension, exposed the company to potential liability issues.

Accordingly, the company's fund administrators hesitated to transition to a new PDF solution, seeing it as an additional burden on their already tight schedules.

Why The Workflow Automation Industry Needs Efficient Document Management

Reliable document management is necessary for this workflow and data management company and the entire workflow automation industry. A lack of efficient document management can cause costly inefficiencies.

A study by a team of work experts found that Americans spend an average of two hours per day looking for documents. This amounts to 25% of an entire 40-hour work week, representing significant time and energy that could have been used for more productive activities. Additionally, research from the Archive Corporation highlighted that businesses experience an **average of 21.3% loss in efficiency** due to disorganized document workflows.

As companies become more aware of these issues' short- and long-term consequences, we can expect a growing emphasis on automation and integration within document workflows to enhance efficiency.

Foxit: The Leading Solution For Efficient Document Management

The workflow and data management company implemented the Foxit PDF suite of products to address the need for efficient document management. They selected Foxit for its cost-effective solutions and powerful VBA command capabilities.

The implementation process was smooth, with Foxit collaborating with the company to integrate VBA command functionality into its PDF workflows. Foxit's team also provided training and support to ensure the smooth adoption of the new system.

The organization particularly appreciated three features of Foxit's PDF suite of tools: 1) VBA command integration for automating the conversion of Excel data into formatted PDFs, 2) customization options for enhancing report presentation, and 3) security features.



The company also appreciated the following features of Foxit PDF Editor, Foxit's flagship product:

- ✓ Foxit AI Assistant immediately condenses information to key points.
- ✓ SOC 2-certified security processes that meet the highest industry standards for process integrity, availability, security, and confidentiality.
- ✓ The ability to encrypt, redact, and sign PDFs.
- ✓ Accessibility solutions such as an Accessibility Checker and an Autotag function that analyzes an entire PDF and tags elements automatically.
- ✓ A PDF Optical Character Recognition (OCR) function that converts scanned or image-based content into searchable, selectable, and editable text.
- ✓ The ability to export data, compare, and convert to PDF from a range of tools, including iManage WorkSite, OpenText Documentum, eDOCS, Epona DMSforLegal, and Microsoft Office.

Benefits Of Adopting Foxit PDF

By adopting Foxit, the company achieved drastic workflow improvements and reduced manual processing time.

Additionally, its staff experienced fewer errors and were able to generate critical financial documents in a timelier manner. These results, in return, led to improved client and stakeholder trust and, ultimately, a higher bottom line. The company also strengthened its partnership with Foxit through reliable support and continuous innovation.



Looking Ahead: Building On The Benefits Of Adopting Foxit PDF Solutions

Ultimately, the workflow and data management company improved its document management processes using Foxit's VBA capabilities. In doing so, the company experienced enhanced efficiency, reduced operational costs, and increased revenues.

In the near future, the organization seeks to continue using Foxit's innovative PDF tools to support its evolving business needs and enhance document workflows.



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