

ARTSYL

Intelligent Process Automation

AJR Group Scales AP, AR to Gear for Growth with docAlpha

“ *Manufacturer’s Sage 100 ERP manages data; Do-Link ECM handles documents; docAlpha is the glue that drives greater efficiency by eliminating manual data entry and document sorting/up-loading for vendor invoices and customer sales orders* ”

The Challenge

As Business Systems Manager for AJR Group, Andrew Meyer’s first assignment was to implement the systems and processes that would allow company to expand business and scale operations without creating back office bottlenecks—particularly bottlenecks created by manually handling AP vendor invoices and manual, duplicative data entry.

The company had invested in DocLink to digitize and better organize their purchasing documents, and to automate routing, coding and approval. According to Meyer, DocLink, an enterprise content management system from Altec, did a great job of organizing their AP documents and delivering 24x7 access to employees from anywhere.

But, with one dedicated AP team member, AJR Group found that they had to assign their accounts receivable staff member to help keep up with the increasingly flow of vendor invoices. As business continued to grow, keeping up with both accounts payable became a real challenge.

The biggest problem wasn’t just volume it was also the velocity of the process, with constant time pressures to manage vendor invoices within acceptable cycle times. Addressing this a process bottleneck would either require additional manpower, or a better, smarter process.

“Getting documents into DocLink was a real time sink,” Meyer said, “As monthly invoice grew from 1,100 two years ago to 1,500, it was hard to keep up and we were stretching too many people too thin.”

The Solution

AJR Group chose to implement the docAlpha transformation platform. docAlpha handles data capture from digital files and scanned documents in a way that is integrated with AJR’s DocLink ECM and Sage 100 ERP systems.



Client

AJR Group, Inc

AJR Group delivers essential daily news, market analysis, data-rich intelligence and a range of marketing solutions to clients and audiences internationally. The company adds value by connecting executives to a community of over 500,000 senior managers and influencers – informing and empowering them, helping them to build their business.

Industry

Manufacturing

(filtration systems, custom foam products and medical devices)

Needs

- Achieve greater visibility and control over vendor invoice processing
- Scale AP and AR operations to support business growth
- Digitize and automate AR customer sales orders

By integrating intelligent data capture and document handling into their solution mix, AJS could instantly capture transaction details from emailed invoices or batch scan mailed invoices. This minimizes manual document handling and relieves the burden of manually keying invoice information into DocLink. Invoice numbers, amounts and vendor details are extracted automatically, and validated against DocLink and Sage records to validate the invoice data, before creating ERP/ECM records and flowing the right information into the right system.

As part of the process, docAlpha can automatically correct obvious errors. When it can't handle an issue on its own, it flags the exception and sends them to an AP team member to resolve.

The Results

Meyer says that combining the capabilities of docAlpha with DocLink helped AJR Group achieve their goals of relieving the burden on their staff in a way that can scale as business grows. As a result, they have been able to boost efficiency while giving the company greater transparency to the process and a higher level of control.

"Once our AP team saw what docAlpha could do for them, they really embraced it," Meyer said, "It really helps maintain control and ownership over our accounts payable process."

As a result, AJR Group's AP team has been able to keep up with vendor invoices to keep pace with growth, without having to add staff members just to handle entering data and sort through documents.

The Future

With AP vendor invoice processes running smoothly, AJR Group, supported by Meyer, decided to leverage their investment in docAlpha to take on another process challenge: the volume and complexity of capturing data from customer sales orders.

By leveraging docAlpha's data extraction and document sorting/filing capabilities, the company is tackling the same manual data entry and document handling bottlenecks they experienced on the AP side of the house.

The goal is to get the most value from their existing data and document systems to support the company's ongoing growth, while elevating the roles of its employees.

"By digitizing our process with docAlpha and DocLink, we're helping the company grow, with fewer growing pains," Meyer said.

"That includes freeing up office space by digitizing documents in a way that provides anywhere, anytime access and clearing out file rooms."

Solution

- docAlpha transformation platform
- Integration with DocLink ECM
- Integration with Sage 100 ERP

Results

- Elimination of manual data entry and document uploading
- Straight-through process for vendor invoices, including document sorting/filing to DocLink and transaction entry to Sage 100 ERP