

# ARTSYL

## Intelligent Process Automation

The docAlpha digital transformation platform delivers 24/7 digital access to AP documents and data for approvals and audit trails

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### The Challenge

Around 2012, agricultural cooperative Cooperative Elevator adopted Webdocs from RJS Software to support their journey towards digitizing their documents and going paperless. At the time, the company realized the benefits of extending access to data and documents throughout their organization.

According to Elevator Co-ops Vice President of Information Technology Barry Albrecht, the next step on that journey was the automation of one of the most labor-intensive and document-dependent processes in the organization: accounts payable.

While Webdocs allowed the company to get a handle on its non-transactional documents with relative ease, digitizing and managing high volumes of invoices, packing slips and related documents presented an additional challenge.

Elevator Co-ops accounts payable team routinely processing over 1,000 invoices and 800 related shipping documents each month. To digitize those documents and automate the AP process, Cooperative Elevator needed a way to automate and streamline the process for filing large volumes of scanned paper and native digital files, matching invoices to packing slips and other related documents and entering related data into the system.

According to Albrecht, while most of the organization had gone paperless, accounts payable remained paper-driven and burdened by manual processes.

"[Before docAlpha] everything was fully paper-based," Albrecht said. "Paper invoices were physically attached to shipping docs, and then to our accounts payable voucher information. If there was a check payment, that payment information was also attached to the physical bundle of paper and filed in file cabinets."

"We wanted to have a process to remove that need for retaining paper, still be able to process in our traditional home-grown system, but store everything electronically," Albrecht said.

"The main driver was to eliminate the need for assembling paper, and also the cost and space and storage of all that paper," Albrecht added.

paper-based, manual process was not only a burden to the AP team - but also to the organization's VPs, who had to review, code and approve invoices. Albrecht could understand their pain, because he was also one of those approvers.

"Invoices were physically routed as a bundle, in a folder. For me, as a vice-president, I would get a folder once a day if I had any transactions to approve" Albrecht said, "Then, I would just initial every invoice in my folder, and every other vice-president did the same thing."



### Client

#### Cooperative Elevator, Inc.

Cooperative Elevator Co. owned by 1,115 farmer producers and has been in business since 1915. Cooperative Elevator Co. is headquartered in Pigeon, Michigan and has plants in Akron, Bad Axe, Decker-ville-East, Deckerville-West, Elkton Elevator, Elkton Terminal, Fairgrove, Gagetown, North Branch, Pigeon, Ruth, Sebewaing, and Larimore, North Dakota. The organization provides quality farm inputs to member patrons. These farm supplies include seed, fertilizer, crop protection, and petroleum. Cooperative Elevator services include custom applications using variable rate technology for sustainability.

### Industry

Agricultural Cooperative

### Needs

- Optimize AP Invoice cycle times
- Support for digital invoice review/ approval
- Deliver instant access to AP invoices, related data and audit trails

## The Solution

To automate document sorting and filing and data entry, RJS Software recommended the docAlpha digital transformation platform from Artsyl Technologies, along with Artsyl's InvoiceAction smart process application.

With docAlpha, Cooperative Elevator could rely on a system capable of automatically classifying documents, extracting relevant data and filing those documents into Webdocs along with that data, automatically.

The InvoiceAction application developed by Artsyl ensured that Cooperative Elevator could deploy a solution that made it easy to configure and deploy a fully automated solution with relative ease, leading to a successful implementation in less than three months.

In phase one of its implementation, Cooperative Elevator has focused on the retail side of their business, which included a large volume of PO-based invoices.

With the docAlpha platform implemented and the InvoiceAction application in production, Cooperative Elevator plant personnel can easily batch scan shipping documents that are automatically sorted, filed and routed by InvoiceAction.

docAlpha matches PO-based invoices and orders automatically and processes them automatically. Exceptions (non-matched invoices) and non-PO invoices are routed for review/coding/approval.

According to Albrecht, InvoiceAction allows approvers to review documents, code them accurately and approve them anywhere at any time.

"Now, we use the web forms from RJS to route electronic invoice, along with the associated documents that have come through docAlpha for approval," said Albrecht.

"They see the web form, and the general ledger breakdown that's been coded by our staff," said Albrecht. "They can click on a link to show all of the actual PDFs of the electronic forms. So now, there is no longer a paper shuffle going to each vice-president. They are presented through Webdocs or access to their inbox to, as I said, look at the electronic web form to approve each invoice."

For Albrecht and the Cooperative Elevator AP team and executives, access to data and details has been the key difference.

"Our VPs are not in their office every day," he said. "They can be traveling for a conference, or on vacation and if they choose, they can access everything now for approval remotely. That's a nice time-saver."

"In the past, we'd have to physically be at a file cabinet in our main office to pull up the historical documents and everything that goes along with it," added Albrecht.

"There's a lot more time saved by being able to retrieve everything on a screen, for all of us, versus either coming here to our main office and looking up or asking somebody in payables to look it up."

Another time saving advantage is the elimination of redundant manual data entry.

"We're not typing in the same information a couple times," Albrecht said. "In the past, we hand-wrote general ledger coding information on some of the physical paperwork. Now, they're keying that in electronically. We actually have a hook in our ERP that, when they approve it, that the GL coding and GL information comes in there automatically, so our payables people don't have to re-key what has already been selected."

The next for Cooperative Elevator is to broaden their scope and transform invoices from their wholesale operations to the new, automated system.

Albrecht and his team look forward to further automating and digitizing their operations.

"I think it has helped us become more organized and effective," he said.

## Challenges

- High volume of vendors and vendor invoices (1,000 invoices/month)
- Multi-channel order submission (Fax, email, etc.)

## Solution

- Artsyl docAlpha Digital Transformation Platform
- InvoiceAction Smart Process Application

## Functionality

- Automated document handling and matching of invoice and order matching
- Integration with Webdocs ECM to intelligently manage all invoice documents
- Integration between docAlpha, Webdocs and in-house ERP systems

## Benefits

- Efficient AP invoice processing
- Platform support for electronic invoice and check processing

"As supervisor of the department, I've seen an improvement in accountability. I have much more visibility and transparency into the work flow status so I'm able to see invoices flow through and see how we're behind and how we're processing invoices so that's been good from my standpoint." – Vincent Baldwin, Controller, Cooperative Elevator, Inc.

## Results

- Instant access to digital invoices, orders and related documents
- Support for mobile/remote invoice review and approval
- 100% liability tracking and process transparency

**ARTSYL**