

# ARTSYL

## Intelligent Process Automation

### Power Mechanical Automates AP Invoice Processes with DocLink and docAlpha

// *docAlpha eliminates manual data entry and document handling, so Power Mechanical's AP team can rely on the DocLink ECM to handle routing, approval and transaction entry into Microsoft Dynamics GP* //

#### The Challenge

As IT Director for Power Mechanical, Inc., David McAlister was tasked with helping the company's accounts payable team to find a better way to handle vendor invoices in a way that scaled as the company grew.

Without a document management system in place that provided any workflow or automation capabilities to code, match or route invoices, the AP team spent a lot of time chasing paper.

"We had five people involved whenever we purchased an item," McAlister said, "So it got a bit crazy at times."

According to McAlister, one key to choosing the right AP automation solution was integration with the company's Microsoft Dynamics GP ERP system.

"It could get tedious really quickly when you have to do double data entry to get transactions approved and then entered in Dynamics GP," McAlister said.

#### The Solution

Power Mechanical chose to implement the DocLink enterprise content management system from Altec to better manage vendor invoices, including the ability to route invoices for approval, support G/L coding from entries in Dynamics GP and ultimately create transactions within GP. As a result, Power Mechanical would be able to eliminate a lot of the wasteful effort that was creating unnecessary process delays and potentially introducing errors.

To make the process even simpler and easier, the company chose to integrate another component into the mix—one that would eliminate the need for the AP team to have to manually enter invoice and vendor data into DocLink and to manually scan or upload documents into the system. That solution, called docAlpha, provides intelligent data capture from scanned paper or digital invoices in a way that happens automatically and invisibly as part of a straight through process.



#### Client

##### Power Mechanical, Inc

Founded in 1985, Power Mechanical began as a mechanical contractor serving the Tidewater region of Virginia. Building upon their previous experience in the boiler industry, the company's founders shifted the company toward specializing in steam and hot water boilers. Decades later, the company evolved into one of the leading suppliers of boiler equipment in the United States.

#### Industry

Petroleum/Energy

#### Needs

- Gain greater control over vendor invoice approvals to reduce cycle times
- Eliminate duplicate data entry
- Eliminate potential sources of error
- Integration with DocLink enterprise content management and Microsoft Dynamics GP ERP systems

docAlpha, developed by Artsyl Technologies, integrates with DocLink in a way that allows vendors to email invoices into a mailbox monitored by the system. Paper invoices can be batched scanned and directed to docAlpha for processing, too. No matter how the invoice gets there, docAlpha automatically finds and extracts information like invoice number, amount and vendor details, then inputs that information, along with a digital image of the invoice, into DocLink.

As part of that process, docAlpha can cross-reference DocLink and/or Dynamics GP vendor records to ensure that all the information it extracted is correct. It can automatically correct obvious errors—or route any exceptions to an AP team member for further review/resolution.

From there, DocLink does the rest—including supporting routing of invoices for review/approval, matching of PO invoices to purchase orders/receipts and transaction entry into Dynamics GP.

## The Results

According to McAlister, merging the capabilities of docAlpha and DocLink has helped Power Mechanical to achieve a new level of control over their processes while increasing efficiency.

“It really enabled us to recapture more purchasing power,” McAlister said, “Our cycle times went from weeks to days.”

As a result, Power Mechanical’s AP team has been able to continue to keep up with vendor invoices, even as the the company grows and the volume/velocity of invoices increases.

## Solution

- docAlpha transformation platform
- Integration with DocLink ECM
- Integration with Dynamics GP ERP

## Results

- Elimination of manual data entry and document uploading to DocLink
- Efficient batch scanning of invoices and related documents into DocLink without manual data entry
- Straight-through processing of vendor invoices to reduce cycles times from two weeks to five days