PaperLess Case Study

Food Industry Leader's fast growth leads to the implementation of Full Document Management Automation with Automatic Matching & Closing of POs
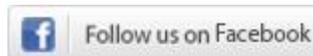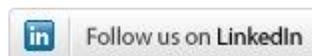
Food Industry Leader's fast growth leads to the implementation of Full Document Management Automation with Automatic Matching & Closing of POs


"Once the accounts receive the Proof of Deliveries we scan them into PaperLess and the system automatically recognizes and archives them… it is so fast to just login into Sage and lookup the PoD directly from the Sales Order…"

Gerard Murray, Accounts Department

David Wood Baking is the leader in the own label sector within the food industry in United Kingdom, a position that the company has built and strengthened over the last ten years and that posed some challenges on how to deal with the increasing number of documents being processed, including the large number of invoices received and printed for approval across 3 different sites.

The main objectives of implementing Paperless were cutting down on the amount of paperwork being stored and to save time on the processing of invoices. Gerard Murray, from David Wood Baking Accounts Department considers that **"… as the company further expanded the way that things were done was not sustainable… we could not keep increasing the headcount indefinitely so PaperLess Invoice Processing automation levels were definitely the right choice for us."**

With PaperLess software the industry leader is saving space on storing paperwork, saving paper used in printing and also saving time on processing of invoices. This because the seamless integration with Sage allows PaperLess to extract all relevant data from the invoices received and automatically match it against the corresponding PO in Sage and, if it matches, to automatically close off the PO and post the invoice into Sage.
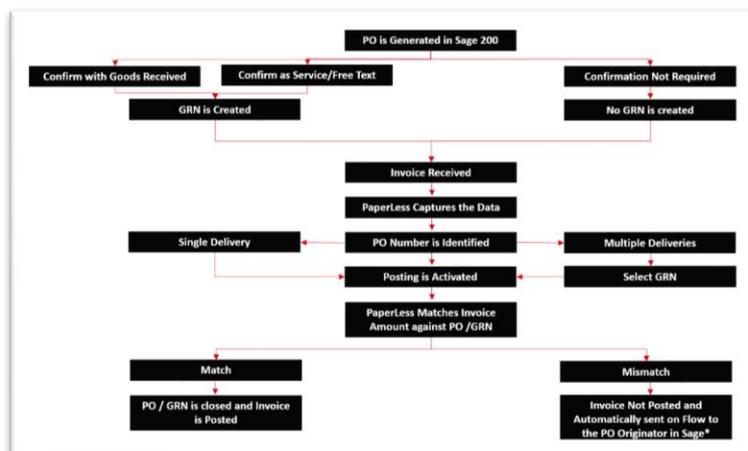
A process that used to be complicated, time consuming and that led to the increase in the number of people in the accounts department is now much faster and easier, with the advantage that for invoices received via email David Wood Baking uses the automation module, PaperLess Company Inbox. ***"This is an amazing feature that is allowing us to fully automate the way we process invoices, we define automation rules to the invoices received and PaperLess does the rest"*** says Murray.

These are automation features only possible to deliver because PaperLess is a Sage Developer and therefore has the expertise and know-how to deliver full automation of emailed purchase invoices. In fact, the seamless and direct integration with Sage were some of the main reasons that led to the choice of PaperLess software with the accounts representative saying that ***"alternatives that were looked into didn't have this working relationship so it wouldn't have been a seamless system… meaning that things such as buttons within Sage wouldn't have been possible."***

David Wood Baking also gets access to Full Automation for Non-Accounting Documents

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In the beginning the client's main focus was to automate the purchase invoice processing side of things, something clearly achieved with PaperLess Company Inbox working together with the Automatic Matching & Closing of Purchase. However, PaperLess took this automation even further by developing the recognition of non-accounting documents with which David Wood Baking automatically process hundreds of proofs of delivery with ease.

A brand-new feature of PaperLess that clients can use to automatically retrieve data and store non-accounting documents. All David Wood Baking's accounts team now have to do is to scan in the POD's directly into PaperLess, run PaperLess Recognition of Non-Accounting documents and if PaperLess finds all data it needs it will automatically store the PoD's and link them to the corresponding Sales

Orders in Sage. Again, the seamless integration with Sage means that the accounts team can retrieve these documents either from within PaperLess Other Documents section or directly from within Sage by doing a lookup from the Sales Order number.

With the implementation of PaperLess software the amount of paperwork stored dropped dramatically and the client is saving a considerable amount of time on processing invoices. The ability to access paperwork and invoices very quickly are also features valued by the company, with the Accounts Department representative stressing that *"…when audit came in it used to be a mammoth task to find all the requested paperwork but now it is as simple as clicking a button when in the past we had to go searching in a storage container that wasn't in the greatest order."*

To know more about David Wood Baking click here

To know more about PaperLess click here