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VERIFY

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Automating Invoice Processing to Save Time and Improve Sustainability

Grant Associates needed a solution that would cut the time spent processing invoices while also reducing paper usage in the finance department.



Introduction

“The best features of Invu Verify are the simplicity of the system and the automation of the process. It is something that I don’t really have to think about anymore. It’s a simple, clean, stress-free process.”

- Ed Lucking, Finance Manager.



Grant Associates is an award-winning international landscape architecture practice that aims to reconnect people with nature whilst addressing the global challenges of urbanisation, the climate crisis, and biodiversity extinction. Their more notable works include the Gardens by the Bay in Singapore, which has won over 100 awards, and the Ankarafa Field Station in Madagascar. They also work more locally with businesses, councils and universities across the UK to improve the spaces we work and live in. They have offices both in the UK and in Singapore.

Sustainability is at the forefront of what Grant Associates do, and it is extremely important for them to do everything they can to help the environment, whether that is by reducing the amount of paper they use, or through influencing the construction industry to reduce their impact on the environment. As a part of this strategy, they decided it was time to review their internal processes and reduce their reliance on paper in the accounts payable function.

Wasting Paper

The accounts payable function was previously very paper-heavy. Ed Lucking, Finance Manager at Grant Associates, had to print out every invoice (the majority of which were emailed) and type the data into Sage 50. It wasn't a particularly long process but was one he inherited when he started at Grant Associates 5 years ago. In fact, processing paper invoices was almost easier than processing them digitally without an automated system. As Ed explained, **"It was annoying to save PDF's on file servers. It was almost part laziness: it was almost easier to print out invoices and keep the hard copies than it was to find your own cumbersome way to store them."** However, this process was not sustainable and was an unnecessary use of paper.

Once an invoice had been fully processed, Ed would write the Sage Transaction Number on the paper copy to help him retrieve it faster in the future. He would then have to get up from his desk and store it in a filing cabinet. After year-end, all invoices would end up in an archive room and then ultimately sent into off-site storage. This storing process worked okay while he was based in the office, although he did find it rather annoying, saying, **"You shouldn't have to leave your computer for that sort of task nowadays should you!"**

Now that he works from home full time, this process would not be possible without him taking regular risky trips into the office to drop the invoices off, nor would he be able to quickly access invoices if a supplier called with an enquiry.

The process overall was not that time-consuming, taking him only a couple of minutes to process each invoice. However, since 2019, Ed's responsibilities at Grant Associates have started to increase following the retirement of their Finance Director. Ed needed to free up his time to be able to take on these additional responsibilities. The best way to do this was by reducing the time he was spending on unnecessary tasks. He decided it was time to automate invoice processing.

"Invu Verify was implemented as part of an overall move to make the office as paperless as possible. The benefits the system brings towards sustainability is one of our key benefits."

Going Digital

“I wouldn’t be able to do all my current responsibilities if I didn’t have Invu Verify. This just highlights how little time the process takes now. I am still able to do the process myself and it really takes no time out of my workday to use.”

Ed required a system that can help streamline invoice processing and that integrated with Sage 50. Ed said, **“Simplicity is key for what we look for in a system. Something you don’t have to think about too much.”** Record-keeping was also important, with Ed stating that **“having a platform that does all the processing and record-keeping automatically for you was a big plus.”**

Invu Verify could achieve these goals, and so was Grant Associates chosen solution.

The purchasing and implementation process was described by Ed as being **“All really straightforward. I didn’t have any issues getting to grips with the software, it was all very self-explanatory and intuitive.”** He also didn’t have to change any existing processes to accommodate Invu Verify – besides no longer having to print out invoices nor having to type in transaction data into Sage 50. Ed noted, **“The integration between Sage 50 and Invu Verify works really well. The system really streamlined our business processes.”**

Invu Verify has now helped Grant Associates achieve its goals in reducing paper usage, therefore improving sustainability, and saving time Ed previously spent on this mundane task. Now the invoice processing process is as follows: Ed receives an email with an invoice attachment that he forwards to the Invu Verify email address. The data is automatically captured off the invoice, Ed quickly checks that all the captured data is correct, approves the invoice, and then it is automatically posted into Sage 50. Ed said, **“The best features of Invu Verify are the**

simplicity of the system and the automation of the process. It is something that I don’t really have to think about anymore. It’s a simple, clean, stress-free process.”

Invu Verify is also now their central repository for storing invoices since the go-live date, and Grant Associates have plans to dispose of the off-site invoices once they are no longer needed. Because of this, it will also come in handy if they have an audit spot check. Ed noted, **“It’s very important for Grant Associates as a business to have good record-keeping on the administration side of things. So, it was important for us that implementing a new piece of software will help us uphold those high standards. I’m very happy that, should we have an audit, we won’t stress about having to find old records.”**

Ed has rarely had to use the Invu Support Teams services that come included with Invu Verify, but when he has used them in the past, he said, **“They were great, they were really responsive and helpful.”**

Invu Verify, as a cloud-based Software as a Service (SaaS) product, is regularly updated with brand new functionality, based on suggestions of other users, and bug fixes. Ed explained, **“System upgrades are quite smooth and do not really affect my day-to-day use of the system.”**

Improving Sustainability

Grant Associates' main goal for an automated invoice processing system has been achieved thanks to Invu Verify. They have almost completely cut out their use of paper in the finance department, with only the invoices that were printed before implementation in early 2020 left in the office and in off-site storage. These invoices will all be disposed of once they are no longer needed per invoice retention requirements. Ed stated,

“Invu Verify was implemented as part of an overall move to make the office as paperless as possible. The benefits the system brings towards sustainability is one of our key benefits.”

Going paperless has also helped Ed work remotely during the COVID-19 pandemic. Ed has tried to imagine working from home without Invu Verify, believing it to be almost impossible without him having to go into the office to process invoices. He said,

“I don't have a printer at home and I'd probably have stacks of paper around me now to manage and would have to take them into the office every now or then and filing everything. The flexibility to work from home has been a huge help.”

“The system ticks all the boxes for us and we wouldn't change anything. We are already future-proofed with it. It's a modern, automated process and I can't see us without it now!”

Saving Time

Ed now has more time to do his day-to-day job thanks to Invu Verify reducing how long it takes him to process each invoice. As mentioned before, Ed has recently taken on more responsibilities at Grant Associates in the finance department, and so being able to free up the time he used to spend on menial tasks has been a big help. He can now review and check an invoice in less than 10 seconds.

Ed said, **“I wouldn't be able to do all my current responsibilities if I didn't have Invu Verify. This just highlights how little time the process takes now. I am still able to do the process myself and it really takes no time out of my workday to use.”** Because of this, Grant Associates have not needed to take on anyone new in the finance department to help with invoice processing, which is an additional cost-saving on top of what they have saved by reducing their use of paper and printers.

“The integration between Sage 50 and Invu Verify works really well. The system really streamlined our business processes.”



Future Proofing

Grant Associates now has a system in place that makes invoice processing easy, helping him save time and take on more responsibilities and reducing their paper usage. Ed exclaimed, **“The system ticks all the boxes for us and we wouldn’t change anything. We are already future-proofed with it. It’s a modern, automated process and I can’t see us without it now!”**

Looking to the future, Ed is planning on rolling out the system to their Singapore office by utilising Invu Verify’s multi-entity functionality. This will further help Grant Associates achieve their sustainability goals, as well as saving his colleague who processes those invoices time in her day-to-day job.

About Invu: Founded in 1997, Invu develops Electronic Document Management (eDM), Accounts Payable (AP) and Purchasing solutions for a range of sectors, particularly those which are highly document dependent or where compliance is important. Invu partners with a range of

software vendors such as ABBYY, a data capture, recognition and extraction tool provider whose FlexiCapture technology sits at the heart of many Invu solutions.

Design by [Hannah Leabon Design](#)