

CALFORDSEADEN

Calfordseaden have over 80 years of experience in providing multi-disciplinary property and construction consultancy services across the UK.



INTRODUCTION

Calfordseaden provides a variety of services, including building surveying, fire safety services, project management and mechanical and electrical engineering to customers across all the major sectors. The award-winning company work hard to make a positive difference to the communities in which they work by creating inspiring and sustainable places using innovative solutions.

THE CHALLENGE

The move to working remotely triggered the need for Calfordseaden to look into an automated solution for their invoice processing. Before this, their process was manual and paper-based. Their reception team would receive an invoice by post or email and then email it around the business for approval before manually typing it into their finance system, Sage 200.

This process involved a lot of emails being sent around the business, especially as they have 6 offices across the UK, and it was difficult to track

invoices. Awareness of what had been processed fully was challenging, and there was a risk of invoices being missed or data entry errors in Sage 200. Calfordseaden also have multiple entities, so they needed to ensure invoices were associated with the correct entity. The process was hard to manage with their staffing levels at that time, especially as they were growing in size.

The pandemic forced staff to work from home, and a less manual and more digital process was needed as soon as possible. They created a workaround for staff, ensuring the finance team had two monitors, one to display the invoice on and the other with Sage 200 to facilitate the entry of invoices into the system. They also began attaching an image of the invoice to the transactions in Sage 200, but this process was still manual and time-consuming, and the rest of the company did not have visibility of their invoices and costs. They decided it was time to fully automate the process.



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“We were very paper-based with long-winded processes that were very much out of date. The pandemic and working from home enforced the change and meant we had to look at other ways of processing invoices.”

Finance Manager, Calfordseaden

THE SOLUTION

Calfordseaden reviewed many different solutions to find the best fit for them. Following a positive sales and demo experience where team members were able to answer all their questions with confidence, Gemma decided Agilico Verify was the easiest and best value option and received buy-in from senior management. Calfordseaden's Finance Manager said, “Everyone seems to think that change can be very expensive, but Verify didn't work out that way for us.”

Calfordseaden's implementation of Verify was smooth, with minimal issues. The system was up and running quickly, allowing the team to start processing invoices without delay. Agilico's support team remains readily available to assist with any queries. Their finance manager values the Verify team's openness to feedback, stating, “Choosing a solution wasn't just about selecting the most well-known option. We've worked with larger, more expensive companies that don't consider suggestions. With Verify, we can propose changes, and the team listens. Some of the updates you've introduced have made a real difference for us.”

STREAMLINED INVOICE PROCESSING

Calfordseaden now have a fully automated accounts payable process in place. Invoices are forwarded to a mailbox, where Verify captures the email and pulls off data including the entity, supplier, net, VAT and gross. After being checked by a finance team member and the coding added, the invoice is automatically sent to the relevant team members for approval before being automatically posted into Sage 200. Calfordseaden's finance manager said of the new process, “Verify has streamlined the process for us. This is one of the biggest wins as it makes us more efficient. We can be more accurate, we can review things because we've got more time.”

An image of the invoice is automatically pulled into Sage 200, eliminating the need for manual file uploads. Since auditors already have access to Sage, this has streamlined the auditing process. They can retrieve invoice images directly without requesting copies from the finance team, saving time and reducing workload.

These benefits are not just seen in the finance department; Verify has created efficiencies across the business. Their finance manager said, “Approvers have visibility of what they need to see. Anything they've previously approved, they can go in and search and see what their costs are, which they never had before.” The approvers are also limited to only being able to see what they need to, so Verify helps from a security perspective, too.



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THE BENEFITS

Calfordseaden has significantly reduced the time spent processing invoices. Previously, the accounts payable team included one full-time and one part-time employee. When the part-time employee left, they considered hiring another full-time team member to handle the growing workload. However, as their finance manager explains, “Thanks to Verify, one person now manages all invoice processing alongside other tasks. They’ve regained more than half the time they used to spend.” This has allowed them to focus on more strategic work instead of manual data entry and email follow-ups.

Another benefit of the implementation of Verify is the reduction in email traffic across the company. As all emails are forwarded directly

into Verify, and all the processing and approval happens within the system, there is no longer the need to send hundreds of emails each month around the business. Additionally, the invoices are all stored in one place, and there is less risk of accidentally forwarding an invoice to the wrong person. “I’m sure IT are very happy about that!”, laughed their finance manager.

The team at Calfordseaden are extremely happy with their decision to implement Verify and wouldn’t look back, as they explained:

“ Everything we expected of Verify, it has delivered. It’s really helped all of our processes and made our accounts payable team very happy. It has changed their job role from data inputting to now reviewing and analysing and the things they want to do. And it has improved processes for teams across the business.”

Finance Manager, Calfordseaden

RESULTS

- ▶ Streamlined accounts payable process
- ▶ Significant time savings
- ▶ Improved processes for teams across the business

ABOUT AGILICO VERIFY

Agilico Verify is an automated accounts payable system that enables you to process all your supplier invoices with ease.

Directly integrated with the most popular finance systems, Agilico Verify makes paperless invoice processing effortless.

So much more than just a data capture and invoice posting tool, Verify enables you to route invoices for coding and approval.

Scan to learn more about Verify.



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