



Marketing Agency Boosts Productivity with Workflow-Based Document Solution

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Lewie Wake, Chief Technology Officer, Advantage Sales and Marketing

Advantage Sales and Marketing wanted to improve the speed and accuracy of its accounts payable process. The company implemented software products provided by Microsoft® Gold Certified Partner KnowledgeLake, based on Microsoft Office SharePoint® Portal Server 2003. Now, invoices are handled 40 percent faster, productivity in accounts payable is up 17 percent, and the company has full visibility into the invoice-approval process.

Business Needs

It's probably true that no one likes to pay an invoice. But the managers at Advantage Sales and Marketing—one of the leading sales and marketing agencies in the United States—really didn't like to pay invoices. Not that they had any problems with their vendors; rather, the company's accounts payable system was causing the pain.

That was because while printed invoices can reside in only one place, Advantage managers could be in any of the company's 50 locations around the United States—so an invoice was seldom where it needed to be

for proper processing. Getting invoices from office to office was a haphazard process of faxing, or else scanning and sending the digital file in e-mail. There was no authoritative way to track the status or even the location of invoices. There was no way to know who had a given invoice, for how long, or when the manager would approve and return it. The accounts payable people responsible for routing invoices couldn't be sure they were sending those invoices to the appropriate managers.

After one of its business analysts looked at the process, however, Advantage knew one



thing: Its invoice-approval process entailed 35 business steps, and that was far too many in the view of company executives.

Lewie Wake, Chief Technical Officer at Advantage, created a task force of IT and business users to address the issues. The team knew that a portal solution—with a single, intranet-based location for storing and approving invoices—could solve the problem. A portal solution could also serve as a model for centralizing and streamlining other processes at the large and widely dispersed company. But solutions were available from leading document management companies such as Documentum, Hummingbird, and IBM, so which should the company choose?

Solution

Advantage rejected the well-known document management solutions as being too expensive and locking the company into proprietary technology. Instead, it chose the KnowledgeLake Imaging and Workflow solution from Microsoft® Gold Certified Partner KnowledgeLake, based in St. Louis, Missouri. That solution utilizes Microsoft Office SharePoint® Portal Server 2003 and Microsoft SQL Server™ 2005, to which KnowledgeLake adds its expertise in document and imaging workflow.

Advantage and KnowledgeLake worked together to streamline the accounts payable process from 35 steps to 14 steps. They then automated the process through the KnowledgeLake solution.

That process starts when a new invoice is received, whereupon it is scanned and converted into a digital image file that is searchable using the search Web Part in the KnowledgeLake imaging product. When an accounts payable specialist logs on to the SharePoint portal, his view in the Knowledge-

Lake workflow reflects his role in the company; for example, the portal might present invoices for preliminary processing. The specialist confirms that the invoice has correct and appropriate information—such as the right purchase order number—and assigns a list of approvers, according to the invoice's cost-center information.

A manager receives e-mail notification when new invoices await her approval. Clicking a link in the e-mail takes the manager to her virtual inbox in the same SharePoint portal. As with the accounts payable specialist, the manager's view is configured according to her role. She clicks the invoice she wants to review, and approves or rejects it with another click. The invoice then continues through the system.

When invoices are fully approved, the KnowledgeLake solution automatically transfers them to the Advantage accounting system, which is based on Microsoft Dynamics® NAV software. Microsoft Dynamics NAV begins to create a batch file as soon as it receives the invoices. The accounts payable supervisor reviews and posts the batch, a general ledger entry is created, and the vendor is paid according to the terms in place in the accounting system.

Benefits

The Microsoft-based KnowledgeLake solution has succeeded in making the accounts payable process faster, easier, and more productive for everyone at Advantage—both the accounts payable staff and the managers who approve invoices. Now, invoices are processed 40 percent faster, and productivity in the accounts payable staff is up 17 percent, saving Advantage U.S.\$95,000 per year.

“With the KnowledgeLake solution and SharePoint Portal Server, we got rid of the faxing, the sending of e-mail, the clogging of the system,” says Wake. “And as much as I appreciate the speed—I’m an approver, too, after all—I appreciate the greater visibility into the process even more.”

That greater visibility means that, for the first time, Advantage personnel always know where invoices are in the process and, if they're held up at any point, the relevant manager can be contacted to keep them moving. The visibility and automated workflow also have a direct impact on Wake. He sees more invoices than ever before—not because there are more invoices, but because now he sees all the invoices that he's supposed to see according to Advantage's own policies.

“This solution makes it easier for us to adhere to our own policies because those policies are built into the workflow,” says Wake. “We didn't have that before with our ad hoc solution.”

The KnowledgeLake solution helps in other ways, too. For example, because company executives often travel between the numerous Advantage offices and a large number of executives work primarily at home, the only network access that executives often have is mobile access. In the past, invoices had to wait for approval until a manager was back at his or her desk. Today, executives can connect to the network and to the SharePoint portal through their mobile devices, enabling the accounts payable process to continue uninterrupted.