

CASE STUDY



CUSTOMER

Bossair

INDUSTRY

Heating, Ventilation and Air Conditioning (HVAC)

CHALLENGE

Managing a manual, error prone and time consuming invoice process

OUR SOLUTION

Invoice Processing with Intelligent Workflow

OUTCOME

Process optimisation, delivering significant time & money savings

MASSIVE SAVINGS ACHIEVED WITH AP AUTOMATION

Bossair provides a full range of commercial heating, ventilation, and air conditioning services to ensure HVAC systems meet today's high expectations of energy-efficient performance. Established over a decade ago, Bossair was the first company in Queensland to be certified under the current Quality Assurance system.

TIME-CONSUMING CREDITOR INVOICE PROCESS

As a small-to-medium sized business with 40 in-house staff and 20 subcontractors, Bossair purchases a significant number of tools, parts, and other items. The business therefore processes a huge number of creditor invoices monthly. The manual processing requirements were enormous. Invoices would be sent as paper-based documents through the mail or as PDF





documents electronically. All electronic versions would be printed, then the invoices would be stamped and have a form attached. On that form, employees would handwrite information such as the purchase order (PO) number, the value of the PO, who raised the PO, and more.

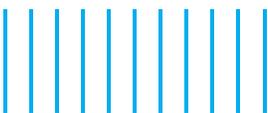
Once the information was handwritten on physical copies of the invoice, it would be handed to the person responsible for procuring that item. That person would approve the invoice, then hand it back to the accounts payable team so it could be manually entered into the system for payment. Upon payment, the document would be manually scanned and saved back into the system against the relevant job number.

This process took huge amounts of time and was error-prone as printed documents could easily get lost during the process. Importantly, it distracted staff from more value-added activities.

Brenden Lamberth, director, Bossair, said, "This process took between five and 30 minutes per invoice and we had thousands of them every month. This presented a massive opportunity for time saving and cost reduction, so we investigated the possibility of a more automated solution."

“ For every hour of labour Bossair sells, a significant proportion of that income is spent on overheads and expenses. By reducing these expenses through automation and systemisation, we can increase our margins.”

**— Brenden Lamberth —
Director, Bossair**





“This solution has delivered phenomenal savings. It reduced our costs so significantly and quickly that we achieved full return on investment in less than 12 months. Staff can focus on more high value tasks rather than just managing accounts payable, which is an added benefit for a small business looking to be innovative.”

— Brenden Lamberth —
Director, Bossair

CHOOSING THE RIGHT PARTNER

After a couple of false starts, Bossair turned to M-Files partner, Upstream Solutions, to define the problem and develop a solution. Bossair wanted to work with the M-Files platform because of its scalability and capacity to deliver ongoing benefits in the business.

Brenden Lamberth said, “We knew working with a partner to implement the M-Files solution achieved a strong return on investment. Therefore we were keen to choose the right partner, which was Upstream Solutions.

“The Upstream team was clearly very interested in understanding and solving the problem rather than simply jumping straight into recommending a technology product. They did an extremely thorough job at the frontend of the project, which was impressive.

“From scoping the project to delivery, the process was relatively quick and the M-Files solution worked brilliantly from day one. It completely digitised our processes to allow us to receive all invoices electronically, code them into the system, collect metadata, get approvals digitally, and complete payment all without ever having to print out documents or handle them manually.”

IMMEDIATE BENEFITS LED TO PHENOMENAL SAVINGS AND STRONG ROI

Because the invoice process is extremely faster, the business can now see live, receipted credit information in the system. This is valuable as it reduces the likelihood of double payments or missing payments. It ensures Bossair pays invoices on time, taking advantage of early-payment discounts where applicable.

Brenden Lamberth said, “This solution has delivered phenomenal savings for Bossair. It reduced our costs so significantly and quickly that we achieved full return on investment in less than 12 months. Staff can focus on more high value tasks rather than just managing accounts payable, which is an added benefit for a small business looking to be innovative.

“For every hour of labour Bossair sells, a significant proportion of that income is spent on overheads and expenses. By reducing these expenses through automation, we can increase our margins. Importantly, it frees up staff members from being tied to their desks to process invoices but who can now do it from any location, on any mobile device. A pile of paperwork on a desk can be demoralising. This solution overcomes that and delivers huge efficiency to each member of staff.



THE BOTTOM LINE



Process automation and efficiencies achieved streamlining workloads



Huge time and money saving by digitalising and automating processes, and adding smart workflows



Reduced potential for errors, late payments, and duplicate payments

“The benefits were apparent instantly and no one was frustrated by the new process. It was simple and easy to use from the start. This investment is a no-brainer; it’s paid off substantially.”

EXPANDING THE SOLUTION

The solution has been so successful for Bossair that they engaged in the next project using M-Files. As an ISO-accredited Quality Assured company, Bossair must comply with specific systems and processes to maintain accreditation. This requires a significant amount of documentation, which had been managed in an ageing system that was becoming inefficient.

Brenden Lamberth said, “Staff expect software they use to work like an iPhone; they don’t want to have to be trained or refer to manuals. Upstream helped address this issue. The expanded M-Files solution lets Bossair manage all our core flat files, templates, and forms with workflows. For example, when inducting a new employee, the system will guide people through a step-by-step process so they know exactly what forms to fill out, whom to send them to and where to file them. This simplified workflow structure is a significant project which also delivers significant benefits.”

UPSTREAM HELPS BUSINESSES WORK SMARTER, DIGITALLY

With a history spanning over 30 years in the print and document management industry, Upstream is one of Australia’s leading content, workflow and print management solutions companies.

Our strengths lie in understanding the immediate and long-term goals for improving processes and reducing paperwork, data entry and duplication, effectively streamlining and optimising workflow. We deliver flexible, cost-effective solutions that alleviate your administrative burden and provide real value to your business.

Upstream’s suite of award winning products are uniquely tailored to suit your business needs.

Our solutions include workflow, content management, ‘Smart’ barcode forms, cost recovery, regulatory compliance, and print management to name a few. We specialise in business processes such as POD, HR onboarding, Accounts Payable automation, Sign on Glass mobility solutions, as well as having extensive experience in document storage and retrieval.

Have you identified document processes in your business that are weighing you down? Get in touch with our specialists, we’re always here to help.

Need a better way to manage documents & Projects?

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