



TRANSPORTATION AND LOGISTICS | CUSTOMER SUCCESS

# LARGE SUPPLY CHAIN LEADER

## Automating manual processes saves countless hours for supply chain services leader

### THE CHALLENGE:

One of the largest supply chain services leaders in the United States was relying on manual, paper-based information in its expense and inventory payables processes. This was a laborious, time-consuming task for the company’s accounts payable (AP) department. Process bottlenecks were a common occurrence, and staff were often overwhelmed with the sheer volume of AP documents to be processed.

Additionally, vendor disputes were a tedious scenario. Every time a vendor called with a dispute, for example to ask why they were paid short, staff undertook hours of research just to locate the relevant documents to find out what happened — whether it was a case of short delivery, damaged products or another reason. Then staff spent more time following the paper trail of invoices and receiving documents, taking into account any adjustments on the invoice, in order to resolve the dispute.

These inefficient processes disrupted their ability to capture early pay discounts, which directly impacted their bottom line. As a result, the company decided to implement automated digital workflows and adopt a more efficient way to manage documents in its expense and inventory payables department.

### THE SOLUTION:

This supply chain provider deployed OnBase, Hyland’s enterprise information platform, to streamline its expense and inventory payables processes. With automated workflows and increased visibility into the status of invoices, the solution had a positive impact on the company’s ability to pay invoices more quickly, as well as realize payable term discounts more efficiently.

Due to the functionality and rapid configurability of OnBase, the company can easily configure and update the system as their internal processes change. And as the business continues to grow, staff are able to process greater volumes of invoices without any additional staffing needs.

“Hyland provides unique, but simple, workflow solutions to help automate existing manual processes,” said the director of Windows Systems, Desktop and Mobility, Telecom, Help Desk and ECM.

With Hyland, the director said, the company is better equipped to compete in the market and serve today’s customer expectations.

“In today’s business environment, it feels like a necessity,” he added.

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| <b>INDUSTRY</b><br>Transportation and logistics    | <b>SIZE</b><br>24,000 employees | <b>DEPARTMENTS USING ONBASE</b><br>Accounts Payable<br>Accounts Receivable<br>Human Resources |
| <b>ERP INTEGRATIONS</b><br>Oracle E-Business Suite | <b>HEADQUARTERS</b><br>Texas    |   |

“Hyland provides unique but simple workflow solutions to help automate existing manual processes. We now have an external facing server where our customers ‘self-serve’ and get their invoices from OnBase without contacting us.”

Director of Windows Systems, Desktop and Mobility, Telecom, Help Desk and ECM

OnBase also seamlessly integrates with the company’s enterprise resource planning (ERP) system for bi-directional data exchange, eliminating the need for manual data entry, minimizing touchpoints and error throughout the payment cycle. Once payable invoices are keyed into the ERP, staff scan the associated invoices. The needed index values are read instantly within the ERP interface, without the need to key them again into OnBase. And using a keyword update process, both the ERP and OnBase are updated with the check number, paid date and other information when the payment is applied.

Further, resolving vendor disputes is no longer a difficult task, as staff can easily access all documents — including invoices, receiving documents, and any adjustments or deductions — alongside the corresponding account record. With a few clicks, staff can zip-up and send these documents to the vendor — saving countless hours of research and back-and-forth phone calls and emails.

Seeing the enterprise-wide benefits of automation, the supplier decided to extend OnBase to other departments, including accounts receivable (AR) and human resources (HR). Now, all invoices and other documents are centrally located within a secure digital repository, allowing easy access to critical information.

As for HR, all documents associated with a staff member are no longer spilling out of file cabinets or stored in siloed systems. Instead, HR files and processes are linked to corresponding employee data in other locations, streamlining personnel tasks and giving HR staff a complete view of employee information. The company is also looking to deploy an event-driven records management system to improve regulatory compliance and reduce risk.

#### THE DIFFERENCE:

**Streamlined payment processes:** The company is now able to process invoices more efficiently, greatly improving its ability to pay them quickly while realizing significant savings by leveraging payable term discounts. Customers are also able to access their invoices from OnBase without needing to contact a staff member.

**Seamless integration:** Integrating seamlessly with the company’s ERP, OnBase eliminates the need for manual data entry and minimizes touchpoints and error throughout the payment cycle.

**Increased visibility:** Vendor disputes are easily resolved as staff have instant access to all relevant documents and information, including any adjustments or deductions due to short or damaged products.

Learn more at [Hyland.com](https://www.hyland.com)

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