INVOICE MANAGEMENT SOLUTION - CASE STUDY

City of Bradford Metropolitan District Council is the local authority of the City of Bradford in West Yorkshire, England. It is a metropolitan district council, one of five in West Yorkshire and one of 36 in the metropolitan counties of England, and provides the majority of local government services in Bradford.

AT A GLANCE

CHALLENGES

- 80% of the invoices arrived at BMDC as paper copies
- High Staff Turnover
- New SAP Technical Support provider
- Tender Process for Procurement
- Solution Implementation during COVID

FEATURES

- Invoice Management Solution
- Intelligent Data Capture
- AML powered matching
- Supplier Portal
- Power BI
- On premise Solution
- SAP integration



We chose Documation as our AP Automation provider because they were really approachable, even when we were working through the issues.

They really listened to what we needed and worked hard to understand the process and any problems, they have been a great partner to work with.

KERRY BAILEY

Strategic P2P Manager

OBJECTIVES

Top priority for BMDC was data capture, and potentially a new scanning solution with a workflow for invoices. They were ideally looking for an automation solution that offered straight through processing with no manual intervention, but were unaware of what functionality was available on the market. Visibility of invoices at every stage of the process was key. Invoices that are 'stuck' with a team needed to be clearly visible to the AP team at every stage

CHALLENGE

Prior to automation, invoices at BMDC were processed manually. This meant labour intensive and repetitive tasks for team members and poor processes which led to backlogs. Visibility and invoice tracking were non-existent.

At the point of implementing the Documation solution, 80% of the invoices arrived at BMDC as paper copies in the post. These were then scanned and added to a workflow as a work item, essentially becoming invisible until the invoice reached first place in the queue for manual inputting. There was no way to locate an invoice once it had been scanned and added to that workflow.

SOLUTION

During lockdown, BMDC went from 80% invoices received by post to 80% by email. It then took longer to process an email copy of an invoice that it did a paper copy. It had to be manually printed, scanned and manually attached. This caused a large amount duplication, with copy invoices being sent around the organisation for approvals.

There were also a few challenges at BMDC with staff turnover and moving to a new SAP Technical Support provider, the implementation occurred during the COVID lockdown period so had to be done remotely.

There were a lot of inherent problems in the processes and workflow, but the Documation automation solution has reduced duplicates and given full visibility of the invoice trail.

The Documation AP Automation solution has enabled most users to refer invoices in the system back into the workflow. Any queries can be sent to the relevant team member who resolves the query and returns it for matching and paying.

Patrick Tipton, Senior P2P Projects Officer said:

"The Documation team provided fantastic support before, during and after deployment. They worked well with a range of stakeholders across the Council, including our IT team and Procure to Pay teams. They understood our challenges and the scale on which we operate and were able to implement a solution which met our needs effectively as well as providing support and problem-solving at crucial points."