HSO Invoice Processing Assistant

HSO Finance Customer
Case Study: Modernise Paper Processes

With the Covid-19 pandemic HSO's Finance customer was fortunate that business was booming but its back-office staff were struggling to support its key workers. Invoices were getting lost within the increase in emails that ensued as a result of remote working.

Industry:

Finance

Needs expressed:

- A fast solution
- Minimal licensing costs
- Automated way to track AP approvals
- Integration into AX2012

Benefits Realised:

- Central repository for AP department
- Quick approval turnaround
- Improved Audit and staff efficiencies
- Increased staff morale

Learn More

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Customer story

With the sudden move to remote working, HSO's Finance Customer was not in a position to suddenly change its current processes. Its Invoice process was still a traditional manual paper process and the business wasn't ready to implement a non-stock procurement system. The Customer needed something to help with its purchases, quickly!

Background

Following a Proof of Concept demonstration, the Customer realised that they could achieve real results using the Microsoft Office 365 licenses they already had, in a short amount of time, thus improving staff morale.

- Improved Invoice Processing
- Modern Approval Functionality
- Integration with AX2012

Situation

The Customer's Business was no different to any business that is starting out on its ERP journey.

They have a great solution for Stock Purchasing, but their Non-Stock Invoices were piling up and getting lost amongst the multiple emails that were being received.

They looked at online approval systems, but these were time consuming to setup and had high licensing costs.

The Customer wasn't quite ready to move its Non-Stock Invoicing onto AX2012, but knew it would be part of the upgrade to Dynamics 365 Finance and Operations, so were reluctant to invest too much in the interim.
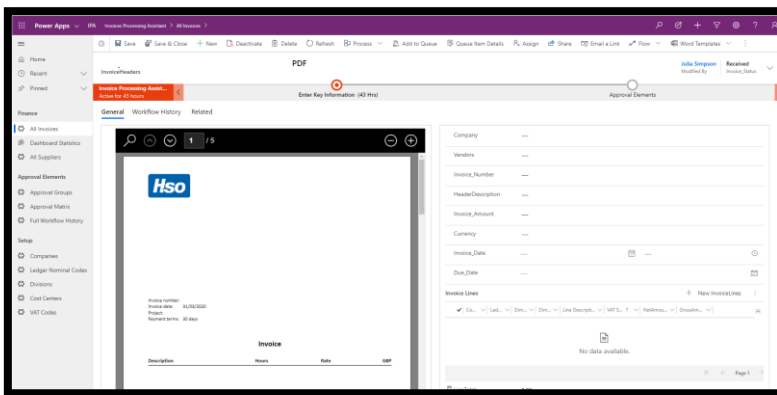
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Solution

The HSO Invoice Processing Assistant is a Model Driven App working off Custom and Standard Entities within CDS. It uses Flow to scan Outlook Inboxes, to download PDF attachments and save them in Blob Storage and as a CDS Record.

Users are given a user-friendly screen to code the invoice before Power Automate Approvals takes over and sends the invoice for approval, based on each individual's own personalised approval hierarchy.

At the end of the day, all approved invoices are either integrated directly into the ERP system or provided in a CSV Format that can be uploaded into a solution.

The interactive dashboard and approval history allows for the business to pinpoint who the troublemakers are and where the hold-up is in the invoicing process.

Implementation

'The implementation was quicker than we expected and the elements that took the longest were getting the right licenses and administration accounts created!

With daily standups we were able to see and contribute towards the solution as it was being customised and before we knew it, we were testing and getting ready to go live!'

Solution in Action

The solution is now adopted successfully by the whole team and morale is increasing. The Customer can see who is taking excessive time to make approvals and the interactive dashboard is interactive.

The Customer has had a large uptake of technology interest from its wider support staff and is looking forward to exploring what will be the next Power App!'
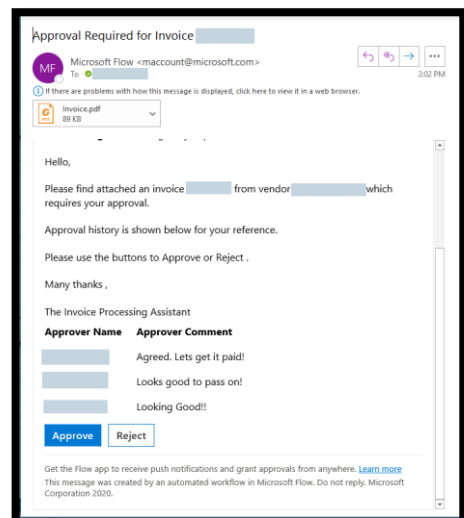
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"Its really easy to use and gives our approvers exactly what they want"

Results

Since using the Invoice Processing Assistant the Customer has benefitted from:

- Greater turnaround time for approvals.
- More efficient Invoice Entry
- No lost documents
- Increased satisfaction from vendors

Better Together

Power Platform and Finance

The HSO Invoice Processing Assistant is an excellent tool for getting theFinance team excited about what the Power Platform can offer and how it can help bring multiple processes together.

Power Automate increases efficiency for invoice attachment archiving and record creation.

Model Driven and Canvas Apps are used to create a unified website, allowing users to experience a seamless process that works off CDS Entities and connectors.

Security is controlled at all time, ensuring documents are kept safe and secure.

Integration to the Finance system is customisable and seamless, thanks to Power Automate.

Power Automate Approvals allows for a one-stop-shop for approving invoices. It allows for control and traceability and mobile approval functionality, helping to bring the organisation into the modern age!

Join our Customers In their Success!

Learn More

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