



DocuWare

Case Study



PRG Group Expedites Accounts Payable Processing With DocuWare and Business Process Management

Challenges

PRG Group provides luxury residential and specialty commercial contracting in Montana. They have been involved in the management and construction of an assortment of projects. From unique renovations to complex custom homes, they pride themselves on personal attention, integrity, and experience. They have led challenging projects to success and completion in many areas. Overall, their greatest experience has been in working on custom alpine homes throughout the West.

With the success in the field, the back office has been struggling to keep up with the volume of paper. The paper-based systems require that all invoices be stored in project file folders, moved from desk to desk manually, and that project manager notes and Job Codes on the invoices had to be manually entered into their accounting system. Although this was a very time-consuming, the procedures were comfortable as they have been in place from the beginning. The challenges that they faced were:

1. Paper process requires project managers to physically come to the office for coding and approval of invoices
2. Double-entry of Job Codes and entry into QuickBooks
3. Manual assembly of paper invoice packets for clients
4. Inconsistent processes for exceptions causing delays and inefficiencies

Solutions

DocuWare Software as a Service (SaaS) was installed with the Intelligent Indexing module and JobRouter Workflow Automation software. Every invoice is now electronically captured in DocuWare as soon as it is received. Invoice information such as Invoice Number, Vendor, Amount, Date, and Job are automatically extracted from the invoice to eliminate manual data entry and potential errors.

The invoices are identified and routed to the correct project managers for coding and approval. When the process is complete, the system transfers the invoice data and job code information directly into QuickBooks, eliminating the need to re-type invoice data.

Results

- Automatic data extraction of invoice data
- Quick, easy exception handling of invoices
- Mobile access for all project managers
- Eliminate data entry into QuickBooks
- Reduce paper handling

“DocuWare has eliminated the tedious work of entering invoice data into QuickBooks, and it has made it easier and faster to find the information we need.”
Jamy Patterson, Partner

Products

- DocuWare SaaS
- Intelligent Index
- JobRouter

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