

Invoice and process automation with**PlanetPress®**

This Objectif Lune customer prefers not to be named.

ABOUT THE COMPANY

This beverage wholesaler, based in the USA, distributes its products to 11 countries and 20 points of sale in the US. They use PlanetPress to simplify its existing accounting and field services.

Region: USA (Wisconsin)
Industry: Food and Beverage
Document type: Invoices

Identifying the Opportunity

The manual process resulted in repeat order numbers, as the company had no way of checking that the new order numbers were not already used. Employees were spending a significant amount of time double-checking in the accounting system.

Invoices were printed and placed into physical folders. There was no way to automatically match invoices with the corresponding bills of lading and inventory reports. The company had no means of ensuring that the correct amount of products were being received.

**Before****THE ISSUES**

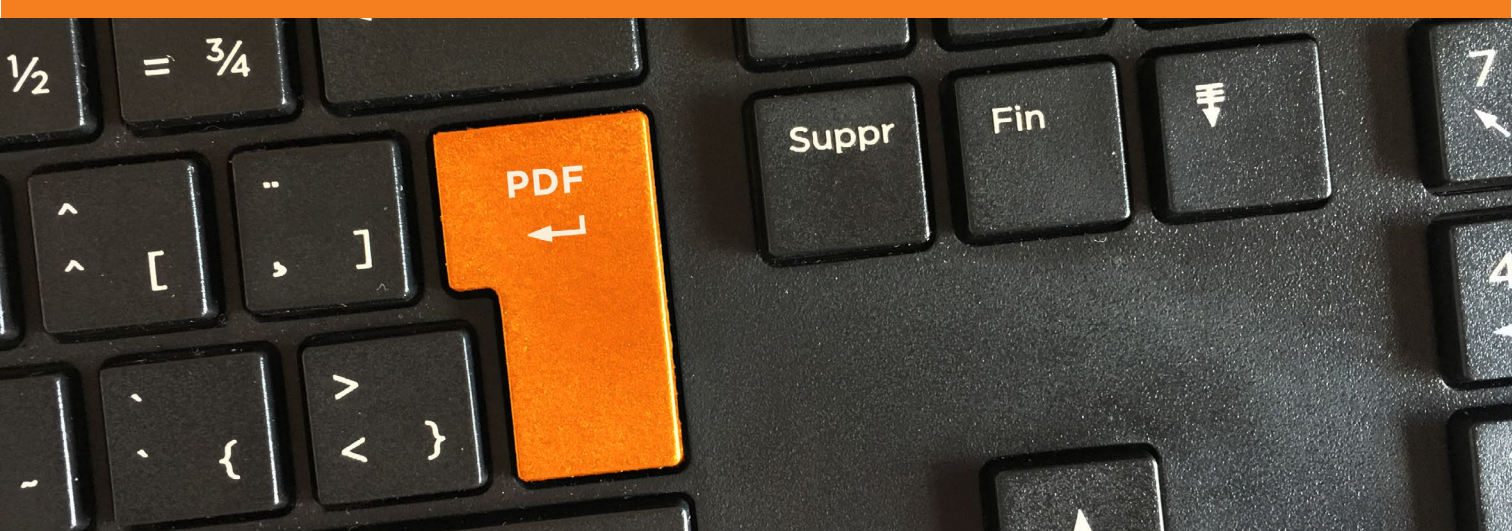
- Approving new orders and invoices required paper documents sent from one user to another for approval.
- Manual processes caused significant delays and increased the risk of errors and loss of documents.
- Every document approved had to be manually entered into their ERP system.
- The company needed a single system to avoid lots of back and forth.

The Solution

With the implementation of PlanetPress, the company automated workflow processes to track the reuse of existing order numbers and to change them if necessary.

The company digitized the invoice approval process and automatically managed inventory comparison.

All invoices are now processed, recorded and available in PDF so they can easily be sent to the customers.

**Now****THE BENEFITS**

- All documents are digitally tracked and approved.
- Manual data entry has been eliminated by automating the invoice process.
- Approving invoices electronically has reduced approval time and minimized the errors and documents lost.
- Thanks to automation, productivity has significantly increased.