

# Sage Document Management by Altec Service Industry

## CUSTOMER SUCCESS STORY



### CUSTOMER

Steele Compliance Solutions, Inc.

### INDUSTRY

Software and Services

### HEADQUARTERS

San Francisco, CA

### SYSTEM

Sage Document Management by Altec  
Sage 300

### SOLUTIONS PROVIDER

Net at Work  
[www.netatwork.com](http://www.netatwork.com)

## Net at Work Provides Steele Compliance Solutions with Solid Efficiency Gains

Steele Compliance Solutions, Inc. is in the business of protecting business. The innovative organization provides a variety of software and software-enabled compliance services designed to assist its corporate clients with their continuing compliance with domestic and international mandates. In addition to boots-on-the ground intelligence-gathering investigations, Steele offers third-party open-source investigation solutions. To both protect and facilitate its own internal processes, Steele trusts Net at Work and Sage Document Management by Altec.

Jim Disano, Steele's controller, first learned about Sage Document Management by Altec while attending Sage Summit. "I went specifically to learn about document management solutions that would integrate with our Sage 300 ERP solution. I met with the staff from Altec and with several other providers but I quickly concluded that Sage Document Management by Altec offered the best integration and the most robust feature set for our needs."

### Burdensome Invoice Process

Steele utilizes hundreds of independent vendors around the globe, called upon as needed to perform project services.



Vendors detail their project fees and expenses on a company-provided spreadsheet invoice template and submit the invoice by email. Previously, Steele staff would use a pivot table within Excel to summarize the data for expediency, and then manually enter the summarized invoices into Sage 300.

Each month, the company processes more than 500 invoices, and before implementing Sage Document Management by Altec, processing a single invoice for a majority of the vendors took a full 20 minutes, not including the largely manual approval process. In addition, the summarized data did not provide the necessary details for analysis.

### From 20 Minutes to 30 Seconds

Since the company partnered with Net at Work and Altec to implement Sage Document Management by Altec, the same process now takes just 30 seconds.

### CHALLENGE

Processing invoices from the company's global contractors was time consuming and highly manual — simply entering the invoice took 20 minutes. The approval process was cumbersome and provided no visibility into the status.

### SOLUTION

Net at Work implemented Sage Document Management by Altec for Steele to automate invoice handling and approval routing. The solution also provides crucial electronic document storage and retrieval capabilities.

### RESULTS

Invoice processing time down from 20 minutes to 30 seconds. Automated workflow ensures the approval process moves quickly and conveniently. Contractor data stored securely and accessibly.

*"We have acquired two additional companies since the implementation, and thanks to the efficiency gains, we have not had to hire any additional payables staff."*

~Jim Disano  
Controller

## ABOUT NET AT WORK

Sage's Top Partner in North America, Net at Work specializes in the consulting, implementation, development and support of the full Sage ERP, CRM, HRMS and extended solutions portfolio. Through a customized blend of expert services and powerful software tools, their expert teams can literally change the trajectory of your business and help you unlock the promise of technology.



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The accounts payable department receives the invoices by email, as an Excel file, and "prints" the files to a printer driver monitored by Sage Document Management by Altec and ERM (Enterprise Report Management) does the rest.

"It's been a game changer for us. Reducing the entry overhead from 20 minutes to 30 seconds saves us a tremendous amount of time and money," says Disano. "We have acquired two additional companies since the implementation, and thanks to the efficiency gains, we have not had to hire any additional payables staff."

### Streamlined Approval Workflow

Previously, the vendors would email each invoice to a project manager for review and approval. Once approved, the project manager would forward the invoices on to the company's branch managers for review and approval who then forwarded them to the payables department, where the invoices were printed and hand entered into Sage 300.

Net at Work configured Sage Document Management by Altec to automate the workflow, routing the ERM-captured invoices to the correct individuals for review, and alerting them of the status of documents under their control. This directed the review and approval away from email and into Sage Document Management by Altec (also known as DocLink), streamlining the workflow and allowing the company to track the status of invoices simply and seamlessly.

In addition, the invoice line detail that was previously lost by summarizing the line item details is now available to the company. "During the summarization of each invoice, we lost a tremendous amount of detail — but just couldn't justify hand-entering all that additional data every time," explains Disano. "Using Sage Document Management by Altec, we are able to retain the line detail of every invoice, which gives us much better insight into our contractor expenses."

### Flexible Approval Process

Disano appreciates that he can configure the notification schedule by user. "Some people like to get a notification each time they have something to review; others prefer just one daily notification," he says.

### Strong Security Controls

As a company dealing with confidential information, Steele appreciates the security built into Sage Document Management by Altec. "It has very robust and highly configurable security features," says Disano. "We choose who has access to what types of documents, and allow some roles to have view only, versus approval or edit capabilities. It fits the way we do business."

As an audit measure in the past, the company's branch managers would review the invoices for possible duplicate charges, slowing the process further. Now, Sage Document Management by Altec performs this security check automatically, saving valuable time by focusing the review on only identified potential duplicates, versus checking each line.

In addition, all documents are electronically stored, easily searchable and accessible, and backed up automatically. Approval routings are automated and documents no longer get lost in the shuffle as could happen when they were routed by email or paper.

### Document Storage and Retrieval

Steele leverages the document storage and retrieval capabilities of Sage Document Management by Altec in addition to the payables workflow functionality. "We store documents including vendors' W-9 forms and their direct deposit details," say Disano. "And of course, sensitive documents are given tighter security settings, so for example, only the payroll department can access payroll-related items."

### A Secure Partnership

Together, Net at Work and Sage Document Management by Altec provide Steele with a robust technology solution that fits the way the company works, securely protects data, and boosts efficiencies.

"Net at Work is our technology partner," concludes Disano. "We've done many projects together and they always get it right. They've got lots of internal resources across many technology areas. We like that we've got one partner to call for whatever we need."