Automated Invoice Routing Gives Non-Profit More Time to Grow the Community

Tree Trust, a non-profit environmental organization established in 1976, focuses on solving two community problems; the devastation of the urban tree canopy and high unemployment rates. As part of their daily mission, Tree Trust works on improving the community by investing in people. The organization provides case management services, job training, and community forestry and landscape maintenance to empower people to give back to their communities.

For over 40 years, Tree Trust has focused on growth. And as their programs have expanded - now serving over 3,000 members - so has their paperwork. Specifically, Tree Trust had increasing issues with invoice management. Problems surrounding the organization's paper-based processes were often due to the misplacement of invoices and the amount of time wasted waiting for invoice approval. For the finance department, it became difficult to keep track of all ingoing and outgoing invoices that needed to be processed. This lack of process visibility caused Tree Trust to search for a document management solution that could automate invoice management and boost their overall business efficiency.

During their search, Tree Trust understood that in order to truly solve their paper-based challenges, they needed a solution that offered dynamic, easy-to-use document workflows. Square 9's award-winning GlobalSearch software offered just that, enabling the organization to effectively improve their business processes by creating custom automated workflows. These digital workflows have allowed the organization to approve invoices in a timely manner, with clear visibility of the process itself. Beyond workflow, additional features that benefited the organization included quick and easy document search and retrieval, plus the ability to restrict document access by departments. Tree Trust was impressed with the degree of automation enabled by GlobalSearch, along with the software's ability to integrate with Tree Trust's accounting software - a major reason why they choose Square 9!

Workflow Improves Efficiency

GlobalSearch is fully used in Tree Trust's Accounts Payable department. With custom approval routing, the AP department has streamlined invoice management, allowing the organization to make

Snapshot

Industry:
Environmental Non-profit

Departments Impacted:
Accounts Payable, Accounts Receivable, Human Resources

Featured Products:
GlobalSearch, GlobalCapture

Objectives:
Adopt a document management system that improves the processing of invoices while assisting an increasingly remote workforce.

more accurate and on-time payments. Tree Trust is now able to route invoices to employees for approvals, set up email reminders, and escalate high invoice amounts to the Executive Director. All while routing invoices back through the finance department for final verification. Tree Trust estimates that about 50% of the paperwork has been diminished within their new digital Accounts Payable process. With less stress on paperwork, GlobalSearch has improved tasks beyond Accounts Payable, and across the entire organization! This drastic increase in productivity, has allowed Tree Trust to spend more time giving back to the community.

50% of Paperwork Diminished

Recently, Tree Trust upgraded to Square 9's latest GlobalSearch version, and is now leveraging the most innovative features in process automation. Tree Trust is now able to support their increasingly remote workforce through the browser client. With the ability to access digital documents through the web, the organization saves office clutter and desk space. The browser client also provides simpler methods to search for and retrieve invoices, which has boosted collaboration between departments and eliminated inefficiencies. GlobalSearch fully supports the remote workers of the organization, which has dramatically increased cost savings! When it comes to value, the finance staff alone has saved about $10,000 a year in labor costs. And overall, GlobalSearch has increased the productivity of the organization by 30% - now that's a lot of time given back to bettering our environment.

For more information on Tree Trust, visit http://www.treetrust.org.

Interview: Angela Horner

Finance Associate, Tree Trust

Q. What criteria did you have in mind when searching for a document management solution?
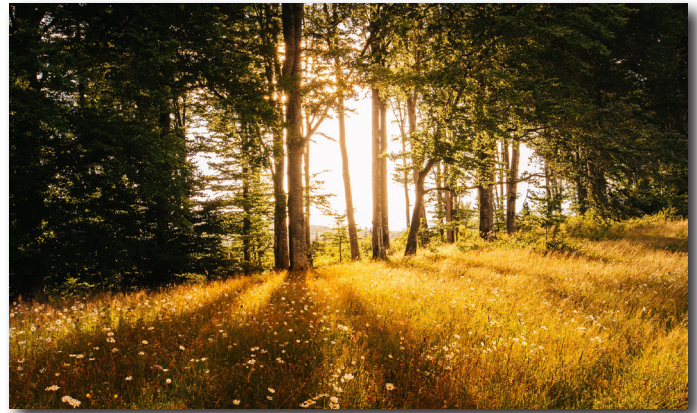
Angela Horner: We were most interested in finding a document management solution that contained an easy-to-use workflow system for invoice approvals, while also being compatible with our accounting software. Additionally, we wanted a simple way to search for and retrieve documents and the ability to restrict access to documents by department. And finally, we wanted the ability to customize after initial installation for other aspects of our finance processing, as we planned to implement only one component at a time, starting with Accounts Payable, then moving on to our Credit Card Receipt processes, etc.

Q. What are the benefits of working with GlobalSearch as a remote worker?

Horner: We have recently upgraded to the latest GlobalSearch browser client, and are really happy with the improvements made to the web interface. There are many benefits to working with GlobalSearch as a remote worker: less desk and office clutter, much simpler methods to search for and retrieve invoices, and better collaboration between departments and overall improved daily efficiencies.

Q. How do you measure your ROI with GlobalSearch and GlobalCapture?

Horner: GlobalSearch and GlobalCapture have saved our organization about $10,000 a year in staff salary savings due to increased efficiencies. Our document management solution allows finance staff members to work 100% remote, both clearing up office space and reducing our paper footprint, the dollar value of which we estimate to be about $3,500. I would estimate about 50% of paperwork being diminished through our Accounts Payable process. Which, in turn, saves trees! And these savings result in roughly a 30% productivity increase. Lastly, our administrative staff has saved an average of 8 hours a week. We anticipate that during our 4th year of using GlobalSearch and GlobalCapture, we will have fully recouped the cost of our investment.

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- Angela Horner
Finance Associate

Q. Would you recommend Square 9's solutions and why?

Horner: Yes, I would recommend Square 9 to others, though we did have some questions after the initial installation. But all in all, we've been really happy with both the support staff and the software, in particular with it being so customizable and easy to use - especially for staff lacking a solid technical background, myself included.