

Case Study:

Baumann Koelliker electrified by automatic invoice processing

Leading Swiss electrical installations group Baumann Koelliker has automated its accounts payable (AP) process with Arcplace. The fully digitalised process allows both paper and electronic invoices to be efficiently captured, reviewed, approved and forwarded for payment before being archived in accordance with legal requirements. Arcplace has also implemented a fully automatic email archiving solution for Baumann Koelliker.



Leading Swiss electrical installation partner

The Baumann Koelliker Group is one of the oldest and most successful electrical installation companies in Switzerland. The Group includes twelve independent business units in German-speaking Switzerland, with a total of just under 900 employees. The core business is tailored client solutions in the area of high and low voltage, cable and network construction, telematics, control and safety, and photovoltaic. The Group's headquarters – which provides central finance, HR, QA, IT and marketing services to the individual business units – is located in Zurich.

“Arcplace’s electronic invoice processing saves us around 5,000 working hours per year.”

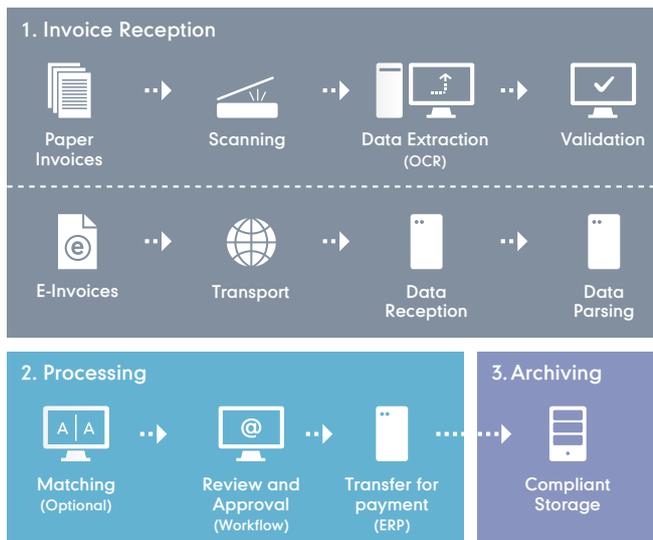
Peter Jenzer – Head of Financial Accounting
Baumann Koelliker Group

100,000 supplier invoices per year

The Baumann Koelliker Group processes around 100,000 supplier invoices per year. The decentralised business units were previously independently responsible for verification, allocation, approval and filing, while the central financial accounting department was responsible for entering and processing the invoices as well as payment transactions. This organisation entailed significant staffing requirements and postal charges since paper invoices had to be sent back and forth. The ten-year archiving requirements for the original invoices also led to space limitations in the secretarial sections. In order to reduce these requirements, the Baumann Koelliker Group set out to find a comprehensive electronic invoice processing solution. Project Manager Peter Jenzer explains the desired characteristics: “More than half of our invoices come from just a few primary suppliers, while the rest are spread across many smaller ones. One of the main goals was to receive and process more than 60 % of invoices in electronic form in the future.”

Comprehensive digital process – also for paper invoices

The electrical installation pros chose a solution from Arcplace on the basis of the AnyDoc (scanning and text recognition), Basware (workflow) and Kendox (archiving) applications. The solution enables highly efficient electronic invoice processing for both paper and e-invoices along with archiving in accordance with audit requirements. The specialists at Arcplace developed and implemented tailored workflows: During the introduction phase, the paper invoices went directly to the decentralised business units, where they were provided with a bar code and then forwarded to the central office for scanning. Today, all paper invoices are scanned in directly at the relevant companies. This eliminates all postage costs between the companies as well as saving even more time.



With Arcplace Automated Invoice Processing solutions, you can automate the entire invoice-handling process.

The financial accounting department then validates all invoices, completes them if necessary and then forwards them in electronic form for verification and release using pre-defined workflows. Order numbers can be extracted automatically during scanning to determine the subsequent path of the invoices. This means that project managers automatically receive invoices relevant to them. Invoices without order numbers proceed to the secretarial department of the responsible business unit, from where they are then forwarded for verification and release. Accounting can view all fully approved invoices in Basware before importing them to the existing Xpert. line ERP system. Once they have been allocated and paid, the documents are automatically filed by Kendox in the legally compliant digital archive and provided with audit-proof lifecycle information. A direct interface to PostFinance was integrated for e-invoices.

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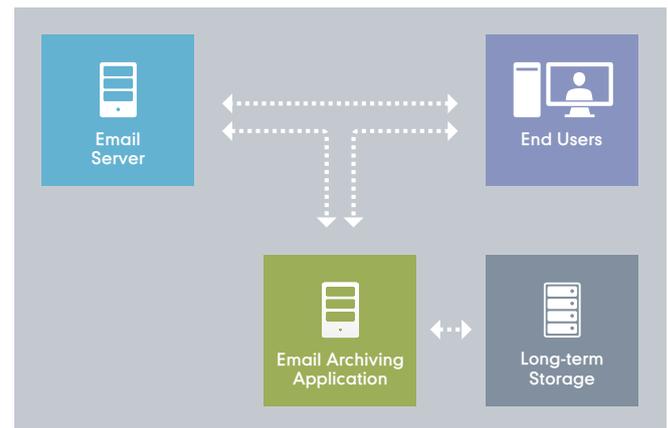
Significant savings achieved

Project manager Peter Jenzer has a very positive opinion: “Our assessment shows us that we now need just two-and-a-half minutes to process an invoice as compared with five-and-a-half minutes using manual processing. With 100,000 supplier invoices, this saves a total of 5,000 working hours across the Group.” According to Peter Jenzer, the automated invoice processing offers other advantages as well: “We aren’t just faster, we’re also more efficient. Costs can be allocated to specific projects and the user-specific allocation templates reduce input errors.

Project managers enjoy increased cost transparency because invoice documents can be accessed electronically from their workstations at any time.” Baumann Koelliker has taken a major step towards processing as many supplier invoices as possible using only electronic means. “With our largest suppliers, we have transitioned entirely to e-invoicing and everything is going wonderfully. With Arcplace we have found a skilled and reliable partner. Their adherence to deadlines and the very pleasant collaboration also goes in favour of recommending them”, adds Peter Jenzer.

New solution for email archiving

In addition to electronic invoice processing, Arcplace implemented a new email archiving solution for Baumann Koelliker on the basis of Veritas Enterprise Vault. The solution monitors the growth of email storage and automatically archives emails and their attachments from Exchange mailboxes to long-term archive storage. From Outlook, users continue to have access to the archived emails and benefit from significantly improved email server performance.



Solution overview

Arcplace AG

Swiss company Arcplace AG is a specialized IT service provider in the information management and archiving industry. Arcplace’s portfolio includes solutions for the scanning, management and archiving of documents as well as the protection and archiving of data. By combining the latest technologies with innovative service models like Managed Services, Cloud Services or Business Process Outsourcing, Arcplace can provide optimal solutions for companies of any size.

Since its founding in 2006, Arcplace has implemented solutions for more than 800 customers across a wide range of sectors. Arcplace is a privately owned and independent company with a professional team of specialists, which boasts a wealth of experience in the development, implementation and operation of IT solutions. Arcplace offers its services via data-centers located in Switzerland and is certified to the ISO 27001 standard for information security.

At a glance

Automatic invoice processing

- + Automation of invoice processing and audit-compliant archiving
- + Improved allocation of costs and avoidance of input and filing errors or document losses
- + Increased cost transparency and improved document control
- + Improved process efficiency and shorter processing times
- + Reduced load on Accounting

Email archiving

- + Fully-automatic archiving without any action by the user
- + Seamless integration into Outlook
- + Reduction of the load on email systems
- + Round-the-clock access to all archived emails
- + Reduced backup and restoration costs