

Case study: biz²ScanServer and biz²DocumentControl
for the automated invoice processing

"Here, the chemistry is right"



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"Here, the chemistry is right"

Brüggemann KG in Heilbronn, Germany as typical middle-class company connects things that are worthy of preservation and progress thinking. For the automated invoice processing it relies on the software of the software partner inPuncto from Esslingen, Germany.

Brüggemann KG is specialized on the production of industry chemicals, synthetic additives and alcohols for different fields of application.

“Preserving of important values and parallel keeping future-oriented pace with the times”

With its headquarters in Heilbronn and establishments in Philadelphia and Hong Kong, the Brüggemann Group with 170 employees and an annual sales of about 120 million Euros it is optimally positioned. The IT works with SAP and especially for the invoice processing it relies on a system of the inPuncto GmbH from Esslingen. The advantages of the inPuncto software for SAP lay among other things in the flexible adaption to the needs of middle-class companies and in the easy handling for users. Not to forget to mention the almost rushing Return of Investment.

Approaching the headquarters of the Brüggemann Group which is directly at the Neckar, the viewer will see the unusual ensemble of architecture. Between production buildings and light-flooded management centers, there is the former water pump plant of the city Heilbronn as connecting element. The listed brick building shows typical characteristics of the industry architecture of the "period of promoterism". Inside the building - completely gutted and lovingly restored - there are ultra-modern offices today.

As a result, already the architecture and the room become ambassador of a healthy middle-class philosophy: "Preserving of important values and parallel keeping future-oriented pace with the times". Also the company boss Ludwig Brüggemann, who does not only have a passion for monument protection but rather, in fourth generation in chief position, feels obliged to his company and employees. "The boss himself", IT leader Markus Bär says, "also asks if something can be improved or how the work of his employees can be simplified."

The implementation of the software biz²ScanServer and biz²DocumentControl (once biz²Validator) which was developed by the longstanding SAP partner inPuncto from Esslingen and successfully applied for the document and invoice processing by numerous SMEs certainly obtains as an example of a useful improvement of work at Brüggemann.

Both inPuncto products together are complementary for the automated invoice processing. inPuncto already had an entrée at Brüggemann through another product of its software range - the so-called "biz² ECM-Suite" (once "biz²BusinessSuite").

The chemistry company from Heilbronn works for quite some time with the biz²Office, a solution for the SAP document management system (DMS), which enables the bidirectional integration between Microsoft and the SAP world.

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"But not only that was crucial", IT leader Markus Bär, who is also responsible for the controlling of the company, emphasizes. Back then, it would have been possible to decide for large DMS incl. FI software. But one would not have been able to use it to capacity. It is also problematic if an additional system pushes forward to similar price categories - "here you are quickly at prices of two, three, one hundred thousand Euro" - of a complete SAP system. That is actually out of question for a budget-conscious middle-class company.

The CEO of inPuncto Dr. Ing. Frank Marcial goes still further into detail: "The SMEs that apply SAP and see it as leading system often only need five to ten percent of the comprehensive DMS software packages.

These external systems gladly come with a separate workflow, separate authorization themes and user management" ... "or with an own database", Brüggemann IT specialist Bär adds: "We did not want that by no means, but rather a nice slim software that works with SAP. When I already have a SAP Content Server within my SAP license, I can also use it. inPuncto is one of the few provider with a complete product portfolio in the area of SAP ECM (Enterprise Content Management), that optimally integrates into the existing SAP world and infrastructure of Brüggemann." For Markus Bär it was a core issue of the EDP architecture, the IT philosophy. The IT manager depicts a plausible picture for a clarification: "If, for example, you have a Mercedes as limousine for the family holidays in your garage, would you add another Mercedes? Or rather a sporting Porsche cabriolet?"

Easy and controllable handling

Monika Rudar is optimally informed of how good one is driving with the sports car, in other words with the inPuncto software. Eventually, she is daily working with the inPuncto products for the automated invoice processing as creditor debtor accountant at Brüggemann KG: "I am really satisfied with the biz²Scanner and biz²DocumentControl. The handling is very easy and always controllable."

The system helps you so to speak, it suggests input routines or warns in case of potential false key errors by directly requesting and comparing data.

Formerly, full invoices that came in at Brüggemann had to be processed, preassigned and captured manually - a working method which is not completely fault-resistant and causes high costs. In addition to that, the manual invoice processing is always linked with the danger that invoices are forgotten, default charges may become due or cash discounts are not used. The process of the automated invoice processing by contrast begins with the digital capture in the finance accounting. When coming in, every invoice immediately gets a barcode sticker and therefore is "unique", doublings through inadvertent double income or manual copies are excluded system-sided.

“What we and the special departments especially like at the application of the inPuncto products is just this process security”

"What we and the special departments especially like at the application of the inPuncto products is just this process security", IT leader Bär from Brüggemann explains. "All invoices are in the system after scanning, they do not get lost and they are controlled by the accounting.

And this immediately after the digitalization by the biz²ScanServer program, also if the invoices themselves are not released yet."

In addition to the process security, the feature with that data can immediately be taken for different business analyses in SAP through the monitoring at the invoice cockpit, is what medium-sized companies especially appreciate regarding the inPuncto software.

That looks like this in the process: With the biz²Scanner (ScanClient by inPuncto for SAP), the whole invoice batch is captured and transferred via SAP to a temporary repository of the Content Server. SAP controls the commission of the server-sided mass processing through the biz²ScanServer. Here, the automated document separation, the OCR (free form) as well as the automated comparison with master data of SAP with the captured values take place.

biz²-family focuses on the existing SAP logic

The SAP workflows are started targeted - that means according to the character resp. contents of the invoices. For that, the documents are archived in the Content Server in the permanent repository. "For the invoice process we directly land in SAP on the SAP workflow container", Frank Marcial from inPuncto emphasizes. "And exactly that is the essential philosophy of our product development.

We see SAP as leading system and we completely use the already existing diverse standard functionalities for our respective instrument.

Every product of the biz²-family or biz² ECM-Suite focuses on the existing SAP logic and develops additional functions on that platform - direct, slim and without redundancies.“

The same thing counts for the biz²DocumentControl, with that the authorized consultant manages the control, validation, accounting and release of the invoice, in our case Monika Rudar.

“The invoice would have to be corrected - or it will go back”.

The Brüggemann accountant gets a notification in the SAP business workflow after scanning and then can call and immediately process the respective work item by mouse click.

In the biz²DocumentControl, the identified texts, comments or markings are illustrated and complemented through the overlay of the scanned documents. If Monika Rudar moves through the input fields, the corresponding scan extracts of the original invoice are enlarged in a separate partial-window to control them.

If a captured value is clicked on, the biz²DocumentControl directly supplies the feedback where the value was found in the image.

If there are conflicts at the validation process, for example with the master data of the supplier from the SAP system, the Brüggemann accountant will be warned immediately through a divergent color deviation in the corresponding input field.

Also information that are becoming averse of the current legal situation for companies doing accounting or averse of the current tax law are criticized by the biz²DocumentControl, Monika Rudar: "When for example the program identifies a value which is not allowed already on the original invoice by scanning it through the OCR, the process cannot be finished by the system. The invoice would have to be corrected - or it will go back".

Simplifying the work for the consultants and in the accounting

A further advantage of the biz²DocumentControl and its extensive integration in SAP is the comparison of invoices with the order processes within the whole ERP. Here, appropriate items are automatically allocated to the corresponding order positions in the background. If any positions remain open, the finance accountant can allocate single invoice values through simple Drag & Drop to the opened order positions or other accountings. The inPuncto software thereby supports her with appropriate F4 help directly from SAP.

The inPuncto software dramatically simplifies numerous procedures regarding the invoice processing and offers many features that simplify the work for the consultants and in the accounting.

Security through transparency at any time

The possibility to bring notes and annotations for example for the following instance directly in the biz²DocumentControl mask is also part of it. Frank Marcial here emphasizes also the aspect of security through transparency at any time: "Once captured comments cannot be changed, they stay in the history of the receipt." In the further procedure - especially by regarding FI invoices - the decision makers who are competent according to the authorization can confer "stamps" and releases. Also here, all employees who participate in the workflow are recorded with "operation date".

Only if all asked information, accountings and authorizations are available, the invoices can be booked: According to the type (e.g. with/without reference to order), the data are delivered only at this moment from the SAP workflow container to a defined transaction (e.g. FB60, MIRO, etc.). The SAP-FI receipt incl. image and detailed workflow protocol can also be viewed later at any time for aims of information or audit through an ArchiveLink relation.

inPuncto software certainly has to be implemented and adapted, too. Brüggemann IT leader Markus Bär:

"We have introduced the biz²-programs for the invoice processing with a parallel installation as test system in the year 2007/2008 while the special department continued working in old manner". inPuncto participated at the pre-implementation and pretests, was also constantly available online during the introduction and was able to intervene at any moment.

Accessibility, support and companion of the customers is self-evidently, according to inPuncto CEO Frank Marcial, part of every project: "Service and support are incredibly important especially at the early stage. Certainly, everything is already part of our program standards. But immediate functional working software shall reflect the specifics of the company. To promptly adapt the standards to the respective company incidents, a close communication with the IT and the specific area is necessary in this stage."

The software entrepreneur lets show that this point really lays at his heart. It is the desire of Marcial to be fair to the middle-class, not only regarding the price of the software but rather also in the address and contact with the customer. "Since 2003 the solution is continuously advanced concerning the functions - there is really much in it. The big names at the market do not bother us - we know about our efficiency, flexibility and passion for the topic - the customers feel that.

Markus Bär can confirm that the software developer from Esslingen is right: "inPuncto is a reliable partner and one feels the willingness to react fast. Desires and requests are quickly answered, the interaction with inPuncto works completely unproblematic - also after the implementation period." To say it in other words: "Here, the chemistry is right", which gets in case of Brüggemann a double meaning.

„ the interaction with inPuncto works completely unproblematic - also after the implementation period”

Therefore, the accountant Monika Rudar is glad about the immediate support, also after four years: "Still today I have direct contact to a project leader from inPuncto who is responsible for me." Nevertheless, also the participating employees at Brüggemann back the project. "By seeing that the programs are steadily working, that the automated invoice processing does not only work at the specific department but rather in the entire workflow in the company, then the acceptance comes really fast", Markus Bär explains and complements: "Eventually, the desire of simplification did not only come from the IT but rather from the specific departments, too".

In comparison to other companies, Brüggemann is growing over-proportionally for years." The crisis", CEO Wolfgang Plaschke says, "did also hit us but we overcame it." Since then, the company from Heilbronn again reaches peaks at sales and gain. It is clear that as a result, also the FI area is fraught more strongly. Through the installed inPuncto software, a slimmer invoice audit and a simplified handling of the entire payment procedure could be realized. Markus Bär: "Formerly, we had an appearance of invoices from 300 to 400 invoices; today the appearance is up to 2000 invoices per month. The increased appearance is managed by the same staff - without higher workload."

By implication that means: If Brüggemann had remained at the old system of precaptured receipts, it would have been necessary to recruit new employees for the finance accounting. If you now take the moderate pricing of the slim products that use the existing SAP environment as a basis, the investment should be paid off already after one year. Brüggemann IT and Controlling leader Markus Bär in every case seems to be content: "I can very recommend the software and services of the inPuncto GmbH especially to middle-class companies."

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