

Case study: Swiss producer of kitchens AFG uses
SAP-FI application by inPuncto

Electronic invoice processing: "That's cool!"



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Already by driving from Constance towards Arbon at Swiss side at the lake Constance, one quickly gets the feeling that everything here is clearly organized and solved in a cost-effective way. Simple roundabouts instead of expensive traffic lights regulate the events on the entire route. What obtains for the traffic can be seamlessly transferred to the electronic invoice processing of the enterprise AFG in Arbon: The applied software by inPuncto is also described with the attributes "simple, effective and cost-saving".

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AFG is the abbreviation for the Arbonia-Forster-Holding AG. The Swiss kitchen specialist took centre stage at the beginning of the year when it was absorbed by the German producer Alno. The strategic partnership should promote the increase of both companies and strengthen the export business. AFG is famous through its both brands Forster and Piatti, with latter as market leader in Switzerland.

But the AFG Holding covers still more business fields: "Altogether, there are five divisions. Besides the kitchens, there are the areas of windows and doors, profile systems, heating and sanitary as well as surfaces technology", the person responsible for SAP at AFG, Marliese Rüede explains.

Slim add-on solutions for SAP from inPuncto

"But not everything in the holding with many branches at many locations operates centrally through us. With the automated invoice processing we "only" summarize the enterprises that are directly located in Arbon". That are the areas of kitchens, profile systems, the management association and a part of the field heating and sanitary - "Per year we move through a region which has an appearance of about 100.000 invoice receipts", Joelle Steib, leader of accounting, complements. And further: "Technically-regarded we have set up different company codes for the individual brands in the Content Repository. Ideally, the system immediately identifies by reference to the address to which client the invoice has to be allocated to."

The software of the IT company inPuncto from Esslingen which specialized in slim add-on solutions for SAP and here, especially in the document management significantly belongs to the "system".

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The product portfolio for solutions like "electronic file" or "electronic invoice processing" is called biz² ECM-Suite and contains various modules, which customers can choose and adapt according to their individual SAP situation. SAP leader Marliese Rüede: "At AFG we talked for quite some time about the conversion of the tedious and very effortful paper-based invoice processing till we decided in favour of the inPuncto software at the beginning of the year 2008". A presentation by inPuncto as well as a visit at a reference customer of the software house from Esslingen of the telecommunication branch led the way. "It was quickly clear: That is no SAP monster", Joelle Steib of the accounting remembers.

„Already after the first conversations we noticed that this software was exactly what we needed.“

We have searched something that we could easily customize and adapt for us.“

The good adaptability of the biz² ECM-Suite of existing SAP systems does not come by chance but rather results of one of the most important principles at inPuncto: "SAP is always the leading system" Dr. Frank Marcial explains.

For the CEO of the inPuncto GmbH, this basic rule is no cliché but a lived philosophy at all products of the biz² ECM-Suite. Dr. Marcial: "We develop our add-on products targeted for SAP. In doing so, we always think and lead the SAP world. That is the only way to stay slim". And further: "We use the entire management functions and logic of the SAP system and therefore do not have to arrive with separate management functions. That enables to supply the necessary functions without redundancies, the handling comfort and the security for documents as well as their data and processes.“

In the case at issue, the implicit "lean thinking" and the concentration on existing functionalities led to the fact that inPuncto waived the application of the own software module biz²Archiver: The repositories of the different brands business fields mentioned at the start were organized in an archive of a competing company which was already installed before. inPuncto project leader Jürgen Ullrich explains here: "Customer orientation also means to react flexibly to existing conditions and to not burden the customer with unnecessary costs. Here, the competence of our software to adapt to existing SAP worlds is a system-immanent advantage."

At AFG therefore were only installed the components, which are inalienable for the automated invoice processing, biz²Scanner, biz²ScanServer and - so to say the core - the biz²DocumentControl. By means of these components, the today's invoice processing can be checked exemplarily.

Like the clue is in the name, the firstly mentioned instrument serves the data capture of the invoices. The biz²Scanner can thereby be applied for direct scanning at the workplace, but also enables the scanning through multi-function units at any time.

The implemented inPuncto-Software-Module

The following processing steps happen through the module biz²ScanServer. The project manager Ullrich explains the functionality: "The biz²ScanServer receives all data that are supplied by the biz²Scanner as single documents or from the processing in batch of a multi-function unit. For this purpose, every received invoice firstly gets a barcode sticker, which provides it a unique status on the one hand. As a result, doublings caused by an inadvertent double receipt or through manual copies are excluded from the beginning. Apart from that, the stickers work as separating "bookmarks" because the system automatically allocates various successive sheets or invoice attachments to the code on the front page." For Jürgen Ullrich, the data capture through barcode therefore accomplishes an important contribution to the entire process security.

Here, SAP controls through the inPuncto software modules not only the invoice capture, the automated document separation per barcode and the OCR, but rather in the further process for example the automated comparison of the identified values with master data in the system, too.

According to the document type, the different SAP workflows are started: Invoices with reference to the order are handled in another way than individual invoices, services invoices in another way than investment invoices with high amounts and appropriate release hierarchies.

The biz²DocumentControl especially validates the three critical values of every invoice and alerts after automated feedback with SAP in case of missing goods receipt, quantity deviations and false invoice amounts. Whereas input fields with a white background color are completely identified by the system. If the biz²DocumentControl in addition to that finds (at reference to the purchase order) the right purchase order number, the appropriate creditor will be automatically dragged and the invoice can either be booked immediately or supplied to the corresponding "approver" in SAP in a release routine which is system-sided allocated to the invoice.

However, since not every decision maker has direct access to SAP, a specific solution had to be found at AFG. "In a concern with many business fields and respective various management levels naturally exist many managers. In most cases, only their assistants are SAP user", Marliese Rüede explains the situation. That is the reason why, formerly, the manager's assistance printed and preassigned respective invoices. After the release through the CEO, the process had to be entered into the system once again.

Thanks to an inPuncto application, the managers nowadays directly get a e-mail with attachment. Rüedes colleague Joelle Steib: "Now, a double click suffices and the biz²DocumentControl already opens like for every other SAP user - even though with limited functions". The chief of the AFG accounting declares herself satisfied. With this, one has found a cost-effective - "one cannot purchase a SAP license for every employee who should just release an invoice" - solution that also convinces through simple handling.

„Now, a double click suffices and the biz²DocumentControl already opens like for every other SAP user“

Another specialty at AFG is the integration of the Electronic Data Interchange format, in shortly EDI, directly in the SAP application server biz² ECM-Suite by inPuncto. That is worthwhile, especially in case of great suppliers and highly recurrent orders. The purchase requisition at AFG generated through SAP for the data communication is converted to the superior format EDI and transferred to the supplier, where a purchase order is set up. After the goods receipt at AFG, the invoice data go the way backwards. They come via EDI, are reconverted and are available immediately.

"For us, this is like an already scanned invoice, which the biz²DocumentControl sends to the booking routine and automatically compares with the master data that is deposited in SAP, purchase requisitions etc.", Joelle Steib explains and encapsulates the fluently interaction of the data with three simple words: "That is cool!"

For legal reasons, one certainly needs an "image", that means a visible invoice receipt. Still yet, at the EDI transfers, a conventional invoice has to be scanned. The biz²DocumentControl compares the invoice through the reference number and other parameters and then independently links it with the booking. The SAP specialist Marliese Rüede especially emphasizes the little word "yet", here: "We are already working on it that an invoice image is automatically delivered or generated also for the receiving data that come in via EDI."

The data format seems to be the universal PDF. Already today, - and that is the third specialty at the customizing of the inPuncto software at the Arbonia-Forster AG - invoices that arrive as PDF attachment via e-mail are directly accepted without printout and scan by the biz²DocumentControl, further processed and provided for the control. "Also that is a great work simplification for the 13 employees at the accounting", Marliese Rüede says.

At the beginning, it did have been a conversion for several colleagues - for comprehensible reasons. Who operated with paper-based invoices and pre assignment stamps for decades, needs a certain settling-in period at pure display work.

The accounting was supported by the management, here. Larger displays were purchased for the employees to get a comfortable and clear view of the invoice image next to the window of biz²DocumentControl. It quickly got clear that the inPuncto software is not "job killer". Because the decruited resources could be profitably deployed for other ambitious tasks. Joelle Steib means that it is naturally always a bit hard to set up a new project. However, the advantages of the inPuncto software became experienceable after a short time.

"easy-to-use" concept of the biz²ECM-Suite

As a result, after a short time, not even after a six-month test period - "the inPuncto support optimally supported us here" - one could already first noticeable benefit of the "easy-to-use" concept of the biz² ECM-Suite. Chief accountant Steib: "Before finally going live, we performed great employee trainings. inPuncto was not any longer involved. We also wrote the manual on our own. Like that we could save costs already in the introduction stage."

The comprehensive transparency is one of the greatest advantages of the inPuncto software, which is directly set up on SAP, for the persons responsible at AFG. Since the introduction of the automated invoice processing, one can immediately and impeccably identify the current position of an invoice in the concern and its processing status.

Joelle Steib: "Now, nothing can disappear in any drawers or paper batches. Everything works very faster and we from the accounting always keep the complete overview." If it may hook anywhere, one can easily initiate also the further processing at the appropriate cost center through the biz²DocumentControl. Since the conversion at AFG, dunning letters are a thing of the past. "To the contrary", Marliese Rüede explains, "since then, the cash discount conceded by the suppliers can be used better. If you take all saving factors together, the introduction of the electronic invoice processing was amortized very fast: "The installation of the software by inPuncto being affine to SAP and the conversion to the electronic invoice processing was definitely profitable".

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