

# Document management for Direct Wines accounts dept

The Direct Wines accounts team handles in excess 2,000 non-stock related supplier invoices and documents each month for everything from IT services to electricity supply. This invoice handling had previously been done via a completely manual system which was difficult to control and which was making payments slow.

## Direct Wines workflow and DM needed streamlining

Prior to the Document Manager deployment, all invoices and related documents were being manually authorised and entered into Direct Wines' Great Plains ledger for payment. These paper documents were then archived into large filing cabinets.

This manual processing was hard to control and slow. The filing cabinets occupied considerable office space and documents were not infrequently lost. The paper system also required staff to physically search the filing cabinets for each of the 20 queries they receive on average each week from suppliers.

The old manual invoice payment process could sometimes take a couple of weeks, with people away or working off-site. Staff would also normally keep copies of invoices for their own files - increasing the use of paper and filing cabinets.

Direct Wines wanted a DM system that would provide its staff with instant access to any invoice and its related documents. This would make the department more efficient, make payments faster and allow more rapid responses to queries.

"We wanted to give better access to information for those in the approval loop," says Finance Manager Jo Quigg.

"We chose Document Manager because of its simplicity, flexibility and scalability – for workflow and document management. Also because of its ability to integrate fully with Great Plains," says Jo Quigg "It was competitively priced with a good track record with large user bases.

Document Manager was simply the most cost-effective way of achieving our aims. We could see how the system had worked for other organisations with similar challenges, and how its use had brought significant, beneficial changes to business processes. We also liked the way workflow and document management was fused together."



**Direct Wines**

**Country:** UK

**Industry:** Wine Merchants

**Key drivers:** To streamline the operation of the accounts payable department.

**Profile:** Owners of the Laithwaites and Sunday Times wine club brands. Direct Wines was established over 30 years ago and now has an annual turnover of more than £200 million.



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### Benefits to Direct Wines

#### Improved Workflow

Document Manager provides smooth, predictable invoice approval from scanning to payment. The system automatically alerts users to relevant invoices. When an invoice has been approved it is imported into Great Plains for payment processing. “The onus is now firmly on staff to respond rather than being chased by the accounts department.”

#### Improved Access to Documents

Once documents have been scanned into Document Manager, staff can access and approve them with a digital signature from anywhere via a standard Web browser. Staff working off-site are no longer a barrier to approvals. “Now, we frequently receive the invoice back approved in half an hour – sometimes instantly” said Jo Quigg.

#### Improved Visibility

With Document Manager staff can see how each invoice is progressing. The system provides a record of all actions being taken by authorisers, and reports any delays, or if an invoice has been sent to the wrong person.

#### Improved Accuracy

Because Document Manager gives staff instant access to the information surrounding an invoice, it dramatically reduces errors in invoice processing, saving management time.

#### On-Demand Management Reports

Document Manager produces a wide range of management reports. “Overall, we have a firmer grip on the business process – and users have dramatically improved access to information.”

#### Accelerated Invoice Approval

“Document Manager very significantly reduces invoice approval time”. Staff can sign off invoices more quickly because they have instant access to surrounding information and they no longer need to make paper copies for departmental filing. ”

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