



Automate and Digitize Your Back Office: Getting Started

June 5, 2019



Missing documents, unbilled revenue, poor organization, outstanding payables, and receivables... Without proper digital document organization, how do you keep things running smoothly in transportation and logistics?

Without an organized process, you won't see any improvements. But if you're running into these problems daily, there's no need to panic. There's a simple, easy-to-implement solution that can get you organized, streamlined, and ready to outperform last quarter: Automating and digitizing your office processes.

With a digital document management and workflow solution, you can:

- Improve overall operational efficiency.
- Increase visibility into spending, all documents, and collections.
- Eliminate the search and rescue of missing key documents.
- Reduce unbilled revenue to zero.
- Reduce the time it takes to bill down to minutes, and the time it takes to collect receivables by days.

Getting Started

The first step in fixing your organization issues is using a Document Management System (DMS). Be sure to avoid Imaging Systems—they may seem tempting, but they're only able to digitize documents and cannot help with workflows.

With a DMS, you can capture documents from a variety of sources and tag them appropriately to make them easy to find when needed. Whether you use email, an in-office scanner, a mobile phone, a CSV, or another IT system, a good DMS will be able to gather your information from any of them.

Your DMS will save, store, and retrieve this information in a secure digital repository where anyone who's been given access can find it with a simple search. You can use a variety of tags, depending on your industry and needs, but some common ones are:

- Type of document

- Load # or Purchase Order #
- Date
- Amount
- Customer/Vendor/Client

With a DMS, you can relieve the load that burdens your administration staff and build a digital process that will save you time and money.

Building a Workflow

Though building a digital file cabinet is great for organization, you should take that one step further and build a workflow. With the help of an automation engine and pre-designated workflow steps, you can move documents through each step quickly and always be able to see where they are in the process.

A workflow system can help you achieve:

- Moving documents, office to office or employee to employee.
- Coding and posting general ledger.
- Indexing documents.
- Automatically send email reminders about outstanding payments to customers.
- Sending invoices with correct documents attached automatically.
- Matching invoices with other documents from the process, purchase, repair, etc.
- Validating invoices against agreed terms.

A full DMS and workflow system that communicates within all of your departments—like accounting, ERP, IT, and more—can automate your processes from end to end, removing the need for any manual documentation organization at all.

With your accounts receivable and accounts payable worked into the automation system, every step of your billing process is handled. Time-to-bill can be reduced from days to minutes with a simple review of the invoice, organized within the DMS, and the click of a button.

How Much Does It Really Save?

The bottom line is that a DMS and workflow solution is only as good as the software behind it. With the right system and execution, you can see a large return on investment. It's important that you measure your success by how much time is saved and if you're able to receive payments quicker and more efficiently. The data says 32 days per year per employee who deals with paperwork.

Specifically, your ROI comes from:

- A decrease in manual documentation.
- Increased efficiency with automation.
- Reduced paper costs, including ink, courier, printing, etc.
- The elimination of unbilled revenue
- The ability to scale up without hiring more admin staff.

From a customer perspective, a DMS and workflow system will greatly increase the quality of your customer relationships and your ability to provide the best customer service. You can receive and send prompt payment for vendors, your employees will be better equipped on a daily basis, and your office staff can go about their day with fewer headaches and more time to do value-added tasks. And for any auditing situation, you can quickly find and retrieve the right documents when they are called for.

The Next Steps

When you begin looking for a DMS and workflow solution, be wary of the simplest options. Even if their low cost is tempting, you don't want

to cut corners and sacrifice quality. Do your research to find the right solution for you, one that has the bells and whistles you need and the customer service and training you'll call upon.

Digitizing your back office is simpler than it sounds, and the increased efficiency and ROI you'll see from the process will help it pay for itself. [Contact us](#) today to learn more about Optix and what it can provide to further the success of your business.