



# BEYER MECHANICAL REDUCES INVOICE PROCESSING BY 60%

*Faster and more accurate monthly closing and reporting, more time to spend making business decisions.*



## ABOUT

**Bayer Mechanical** is one of the largest commercial air conditioning companies in South Texas with expertise in service, maintenance, construction, and design build. They utilize the latest technology to provide efficiency in every day business in the field with the goal of providing their customers with the most optimal service in the region.

# 60X

FASTER  
APPROVAL ON  
1,500 INVOICES  
PER MONTH

# 60%

REDUCTION  
IN INVOICE  
LIFECYCLE FROM  
5 DAYS TO 2 DAYS

## FAST FACTS

- **1989** — Launched as a family owned and operated business, which continues to this day
- **15,000+** — Customers served per year
- **35%** — Faster than HVAC competitors from concept to completion

## Challenge

Beyer Mechanical works with vendors in the heating, ventilation and air conditioning (HVAC) industry and engages with thousands of customers for service and construction contracts. Each month its two AP clerks processed 1,500 invoices using an older AP system and PaperSave. But, each invoice had to be manually coded and routed for approval. Also, its enterprise resource planning (ERP) system Sage Intacct wasn't integrated with PaperSave, so PO matching for invoices was often unreliable with error-prone POs coming into Intacct.

Financial Controller Jeremiah Heisey said, *"We'd have POs in our AP system that PaperSave couldn't pick up, some POs that came in with incorrect information, and duplicate invoices it couldn't catch. Each time a clerk clicked on a PO, the system would stall for 15-20 seconds, and twice that time any data had to be corrected."*

*"When you're coding 1500 invoices a month, that adds up. The approval process was also lengthy, as managers had to approve each invoice individually. Ultimately, we couldn't get all of our invoices in on time so we couldn't close our books on time."*

### BEFORE

EACH INVOICE HAD TO BE MANUALLY CODED AND ROUTED FOR APPROVAL, WITH ADDITIONAL DELAYS FROM PO MATCHING.

## Solution

After PaperSave tried for 45 days to integrate with Intacct, Jeremiah got a cold call from a Stampli sales representative and was immediately impressed with what he heard. *"We felt comfortable with Stampli right away and read many of Stampli's reviews on G2. The feedback from other users affirmed that Stampli was the right choice,"* said Jeremiah. The Intacct — Stampli API integration was completed in less than 48 hours and AP clerks were entering invoices by themselves the next day.

**Stampli has enabled the AP process to be fully automated, leveraging AI from invoice capture, to coding and approver selection, to sending approved invoices to Intacct for payment.** With Stampli, all POs are now in Intacct, as service contract POs generated by a third party get imported nightly.

When Beyer Mechanical's team had to quickly pivot its entire workforce to work remotely during the recent pandemic, Stampli was a facilitator. *"Our invoices are all current now, so when COVID-19 hit, we were able to spend more time making the right decisions for our business,"* said Jeremiah.

### AFTER

STAMPLI HAS ENABLED 100% OF THE AP PROCESS TO BE FULLY AUTOMATED AND THE TEAM TO CLOSE THEIR MONTHLY BOOKS ON TIME.

## Business Outcomes



### 60% reduction in invoice processing

"I can confidently say that with Stampli our invoice lifecycle is 48 hours or less per invoice. Before it took at least five days, and with our invoice backlog, it was probably much longer," said Jeremiah.

With all invoices in Stampli and its ability to read the POs in Intacct, the matching and coding is done automatically. "The only thing the AP clerks need to do is evaluate if it's a full or partial invoice, and that's been the biggest time saver for us from the AP process," he added.



### Closing books within 10 days of month end

When Jeremiah came on as financial controller, he set the goal of the AP team being able to close their books no later than the tenth day of every month. "The second we got Stampli, that happened, the very first month. We closed by day 10", he said.

Jeremiah and his team now know exactly how the business did in a month, as Stampli ensures 100% of invoices are in within 10 days of month close. The business gets the visibility into its financials that it needs for accurate reporting.



### 60X faster invoice approval

"With our old system took 60 to 120 seconds to approve an invoice, and now, with Stampli, it can literally take one second. What used to take approximately 50 hours per month can now be done in half an hour across all our invoices," Jeremiah said. Just think what an AP team could do if it could recuperate 5 hours per week per AP person.

"Stampli's AI learns our vendors and the invoices they send, taking a lot of onus off the AP clerks. We've improved AP clerk resource efficiencies by 33%," he added.



### <48 hours to integrate Sage Intacct with Stampli

"The integration didn't even take 48 hours. Our AP clerks were entering invoices by themselves by the next day. Because of Stampli's knowledge of Intacct, the integration went incredibly fast," he added.

"Our clerks are becoming more like managers, because they're pulling invoices that are pre-populated. They're not having to manually enter so much data, which gives them a lot more power," said Jeremiah.



OUR INVOICES ARE ALL CURRENT NOW, SO WHEN COVID-19 HIT, WE WERE ABLE TO SPEND MORE TIME MAKING THE RIGHT DECISIONS FOR OUR BUSINESS



— JEREMIAH HEISEY  
Financial Controller at Bayer Mechanical

## Want results like Bayer Mechanical?

Take the first step towards better Accounts Payable. Meet with one of our AP experts.

LET'S TALK