



Spanish Fork City Transforms Invoice Processing

*2X faster invoice lifecycle with automated expense allocations
and easily customized invoice export files*



ABOUT

Spanish Fork is situated in central Utah, and lies in the south central portion of Utah County. It's named after a river adjacent to the city's original location, which was dubbed by the 1776 Dominguez-Escalante expedition. Spanish Fork is a community that strives to maintain a high quality of life, and provides an outstanding environment for working, recreating, and enjoying life.

12X

FASTER TO GET
AUTHORIZED
INVOICES INTO THE
ACCOUNTING SYSTEM

2X

REDUCTION IN
THE INVOICE
LIFECYCLE

FAST FACTS

- **1855** » Incorporated as a city
- **2017** » Rebranded its motto to "Pride and Progress"
- **45,000** » Population, which has doubled in the last decade
- **1st** » Icelandic settlement outside of Europe

Challenge

Spanish Fork City has worked for years to make sure it has the ability to accommodate growth. Under the auspices of the City's Finance Director, Kent Clark, a four-person accounting team is responsible for managing the accounts payable (AP) process, but only one person was charged with sending 1,200+ invoices per month to the right approvers.

The City received about 75% of its invoices via postal mail and Christy Johnson on the AP team spent two days every week manually routing the paper invoices for approval signatures. They didn't have an AP process to accommodate growth, so when the COVID-19 pandemic hit, the City's finance director began looking for technology to automate the process.

Amidst COVID-19, the AP team began using electronic signatures on invoices so the staff didn't have to come into the office. But they still printed all approved invoices, manually entered the data into their government accounting software platform, Caselle, and stored the physical files.

They tried using document management software to automate AP and store approved invoices. But it fell far short of their needs. Spanish Fork needed a true AP automation platform to take control over invoice processing with smart, intuitive, and actionable AP automation.

Solution

Stampli connects with Caselle via file integration, which enables it to facilitate a fully automated AP process. **Now 100% of invoices are available in Stampli on the day of receipt and its artificial intelligence (AI) technology — Billy the Bot — helps automate invoice processing and learns the organization's unique patterns to streamline processes.**

After Christy reviews the invoice and adds any header details needed, Stampli makes it easy for her to assign one or more approvers and send for approval. Invoices over certain threshold amounts are assigned to the appropriate finance manager, and Stampli ensures that approvals are completed following the sequence of the assigned approval order.

If needed, approvers can re-route the invoice or ask questions to AP or other departments on top of the invoice, taking much of these time-consuming tasks out of the AP clerk's day.

The approvers code the invoice with the correct GL and approve - all with the convenience of seeing the invoice image. Approved invoices are then reviewed by AP and authorized for payment.

After checks are issued, the payment status and reference of paid invoices are updated in Stampli based on a file that Christy drags-and-drops from Caselle to the virtual drive folder on her computer. This folder then automatically updates Stampli with the payment information.

Business Outcomes



2X reduction in the invoice lifecycle

"Before Stampli, Christy would put invoices into approvers' in-boxes at the beginning of the week, but usually didn't have approval until the end of the following week. Now invoices are easily scanned and sent to Stampli on the day of receipt.

"We send invoices to the approvers across all departments the same day the invoices come in, which is at least four times faster than before. And, we've reduced our invoice lifecycle by 2X because now we're processing and paying invoices the same week we receive them," said Christy.



12X reduction in the time to get authorized invoices into Caselle

After invoices are coded and approved in Stampli, Spanish Fork creates invoices in Caselle using their customized invoice export file. Similar to other file integration customers, Stampli customized the invoice export file to enable all fields and data types required to create an invoice to be available in the invoice export file.

"All we have to do is click "Create export file" and Stampli automatically creates the CSV file with all invoices awaiting payment. I then upload the file into Caselle, which eliminates manual data entry. What used to take up to 12 hours can now be done in about one hour," said Christy.

Stampli also customized a file so that when invoices are paid in Caselle, the posting period in which the payment was made is available in Stampli. This makes it easy for each department to use Stampli to easily run reports to find exactly when each transaction affected its budget.



Automated expense allocation across departments

The team is saving significant time with Stampli's table template feature for 15-20 recurring invoices from vendors with expenses allocated in the same GL across departments, such as cleaning services and utilities. Since table templates pre-populate GL information in invoices, approvers spend less time adding GL codes, leading to faster reviews and approvals. The City is recouping 50+ hours per month across all approvers and departments to use on more valuable and strategic projects.



Enhanced visibility facilitates cash flow management

Stampli's advanced search capability enables AP and all approvers to search invoices based on a variety of filters, such as GL codes, vendors, statuses, departments, dates, approvers, and even custom fields. Users can easily track prepaid expense accounts for projects and track invoices for grant funding requests.

"Before, we had to search Caselle by GL code, find the vendor information, and then hunt for the related data in a filing cabinet. Now, all users can find what they're looking for without needing AP's help," she added.



SPANISH FORK
PRIDE & PROGRESS

What's Next?

The AP team describes Stampli as "convenient", "simple", and "user-friendly". It has provided the AP automation the team needed, and now, leveraging their success with Stampli, they are exploring options to expand automation to check runs.

Want results like Spanish Fork?

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

LET'S TALK