**STAMPLI** | **CORK**HOWARD CONSTRUCTION

CASE STUDY

# "I never thought I'd find anything that worked with Sage 300 CRE"

## How Cork Howard Construction finally found AP automation that supported the way they did business

## 90%
reduction in paper use by AP

## 99%
reduction in time spent by field managers seeking historical vendor information

## About

Cork Howard is a boutique general contractor specializing in high-end renovations for hotels, hospitals, universities, and offices. With a focus on jobs where quality work is imperative, the firm has established a strong reputation across Georgia and beyond for excellence. To maintain their pace of growth, they needed to automate outdated manual AP processes. But the first provider they worked with couldn't integrate with Sage 300 CRE. Would Stampli be any different?

# Challenge

## Automating AP without reworking Sage 300 CRE

Specialty contractors in high-end renovation projects rely on keeping close tabs on costs to preserve slim margins. But for Cork Howard, their accounts payable process was bogged down by manual paper workflows, which was far too slow to provide the real-time cost visibility they needed.

Project managers could only access subcontractor invoices in color-coded physical manila folders. Without the ability to access documents remotely, they could only view, code, and approve invoices when at the office. The paper-based approach bottlenecked teams, who could not easily collaborate with accounting during a job, and also caused invoices to get misplaced or lost. The process took weeks.

Unfortunately, Cork Howard struggled to find an AP automation solution that could integrate with Sage 300 CRE. An initial deployment of another system failed to support specific Sage 300 CRE fields — something they only discovered at the END of the long deployment process.

At this point, Controller Milissa Douglas thought AP automation was unattainable. "I never thought that we would ever find anything that would work with Sage 300 CRE," Douglas said. But since manual AP was an unsustainable solution, they tried again — this time, with Stampli.

# Solution

## An integration that's customizable to how they do business

I thought finding a system that worked with our Sage 300 CRE was impossible," reflected Douglas. "Seeing how customizable Stampli is to what we need has been eye-opening."

With Stampli, the firm was finally able to precisely customize required invoice fields such as cost code, category, and description, and have it all exported accurately back to Sage 300 CRE.

Instead of folders getting passed around the office and job sites, Stampli centralized all invoices digitally. With invoices visible in one cloud-based system, project managers gained the flexibility to match documents and approve invoices from anywhere. Also, by using Stampli's workflow automation and customizable rules, Cork Howard gained the flexibility to set up multi-level approval demands without altering their processes.

> "Every field like cost code or category has to match exactly to Sage 300 CRE. Stampli has given us the flexibility to customize these fields so we could easily match and export back our ERP."

Best of all, training was easy. "Nobody likes change," said Controller Milissa Douglas. "But once everyone got on board and found out that it was a lot easier, it was automated, you could do invoices wherever, whenever you wanted to, and you didn't have to call the accounting department to get a copy of something… they jumped on board."

For Douglas, the greatest benefit was significant time savings through eliminating paperwork. "We don't have to keep paper copies. Everything is electronic. We don't double copy stuff and lose invoices because it's all in the system," she said. "Best of all, the efficiency gains aren't just felt in AP — our project managers in the field can instantly find the information they need for customer billing. Our gain is their gain."

Combined with Stampli's configurable platform satisfying their Sage 300 CRE requirements and complex approval processes, Cork Howard could increase efficiency for project managers and accounting departments company-wide and achieve the visibility into cash flow that their business needed.

"Our project managers love that time spent digging for invoices has become a thing of the past with everything available to access anytime, anywhere."

# Bottom line

**Specialized needs for specialized firms**
For contractors like Cork Howard, finding solutions that adapt to their environment's unique needs is imperative but difficult. Stampli's configurable platform and integration with Sage 300 CRE finally delivered the flexibility Cork Howard needed without disrupting processes.

**No more running around siloed workflows**
Douglas emphasized efficiency gains from eliminating reliance on scattered paper invoices getting physically passed around. With Stampli, workflow automation promotes collaboration rather than creating bottlenecks.

**Visibility emerging from the shadows of data silos**
The move from folders to centralized digitization ensures critical job cost history and AP data remain visibly accessible across the organization instead of being caught in information silos."

**Less paper saves more than trees**
"I don't want to exaggerate," said Douglas, "but we were going through probably three to 10 cases of paper a month. Now, we go through that perhaps every six months." This reduction in paper has not only made their processes more automated and efficient, but has also greatly improved accessibility to information, saving them a significant amount of time.