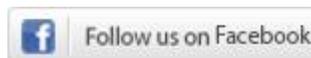
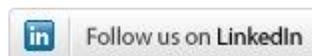


over
1700
installations in
Europe



PaperLess Case Study

**Leading UK pipework systems saves hours of work per week
by implementing PaperLess Document Management**



Leading UK pipework systems supplier saves hours of work per week by implementing PaperLess Document Management

Faster invoice processing routines, greater accuracy in the bookkeeping process and no more time spent on manual paper filing are just some of the main experienced by JACOB, the UK leading company in pipework systems, who also considers the purchase invoice approval system of PaperLess as an invaluable feature.

The leading UK company in pipework systems that has the largest warehouse of its kind in Europe - JACOB – needed a solution that would allow the entire team to have a complete overview of all documents received, and at the same time automatically retain an archival history of all contacts with the customers without having to spend time filing paperwork.

After looking at several options, PaperLess Document Management software was the chosen solution because besides giving answer to the company's needs, it also offered a seamless integration with Sage 50 Accounts. This meant that JACOB's team could also have access to Automatic Invoice Recognition, with all documents automatically stored and linked to the transaction lines in Sage 50.

The integration between PaperLess and Sage allows the retrieval of a document by doing a simple look-up directly from within Sage, meaning no more time spent on manual filing. However, for Paul Adams, from JACOB Accounts Team, ***“the main change is that we have a central filing system that can be accessed by everybody without the need to (mis-)file paperwork, and greater control of both the Sales and Purchasing systems.”***

- **Faster Invoice Processing Routines**
- **Greater Accuracy in the Bookkeeping Process**
- **Easy and Simple to Approve Invoices**
- **Clear audit trail of Invoice Approval Process**
- **Central Filing System Without the Need to (Mis-)file Paperwork**
- **Complete Overview of all Incoming Enquiries**
- **No more time spent on manual paper filing**
- **Processing of Invoice and Customer Receipts Made Easy**



With PaperLess software the entire team at JACOB can see incoming enquiries, meaning that they all get dealt with and everyone can see the progress of sales enquiries, and can each help with the

PaperLess Case Study

caseload. Documents can also be easily sent for approval within the PaperLess system, and it is easy to keep track of the status of each one of them, something clearly valued by Paul Adams who considers that PaperLess has **“become an essential platform”** for the company’s activity.

Besides providing the means for greater control of Sales and Purchasing, for the company’s representatives PaperLess is also allowing them to save time and achieve greater accuracy levels in the bookkeeping process. Significant time savings were achieved by simply removing the necessity for manual paper filing as well as by the reduction of time spent on manual data input with PaperLess Automatic Invoice Recognition.

For JACOB, using PaperLess to process incoming purchase invoices was relatively easy and customer receipts are generally much easier to process using PaperLess. As when implementing any new software solution that changes routines, some adjustments were needed, like for example a change to the invoice layout by JACOB’s parent company increased invoice recognition success rate even further.

An implementation project where client’s expectations were clearly fulfilled, with the company considering that even after the implementation of PaperLess, they are still able to upgrade as usual to latest Sage versions, as PaperLess (as Sage Integrator) are quick to comply with new Sage versions. Paul also considers that PaperLess software upgrades are good with their improvements and new functionality, but wishes that one of the new features, recognition and automatic archiving of non-accounting documents, were available with Standard User license, making the pricing of such new software feature more competitive. Recognition of documents requires Bookkeeper User license.

Overall for JACOB the fact that PaperLess enabled them to have a central filing system, with all Purchase Invoices automatically archived and where the entire team can easily view all incoming documents and act upon them when necessary, are some of the main benefits PaperLess software brought to the company.

This client also stresses the importance of PaperLess Invoice Approval in their activity, with the authorisers being able to have quick access to purchase invoices needing approval and to approve or request changes with ease. The integration with Sage means that both invoices and the complete audit trail of the approval process are automatically linked to Sage, that these can be easily retrieved by doing a simple document look-up from Sage transactions or alternatively, from within PaperLess’ powerful Accounting Archive.

To know more about JACOB [click here](#)

To know more about PaperLess [click here](#)