



Summit extinguishes invoice woes with Compass AP Workflow™ powered by ECM Toolbox™



CLIENT

Summit Companies

PROBLEM

Manual AP invoice inefficiencies were slowing business

SOLUTION

Compass AP Workflow powered by ECM Toolbox and AppEnhancer

BENEFIT

Increased efficiency through digitization; cost savings; process control improvements

EXECUTIVE SUMMARY

Since 1999, Summit Companies has been at the forefront of the fire protection industry, providing an innovative one-stop-shop solution for fire detection and suppression on the local and national level. With two decades of inspired growth that saw the company's value skyrocket, Summit is on track to reach \$1B by the end of this year. Summit acquired Fire & Life Safety (FLSA) in 2020 and built a portfolio of premier fire protection companies with a complete set of services designed to protect buildings, assets and people.

At the time of acquisition, FLSA was implementing a new Compass AP workflow solution designed by an ECM Toolbox authorized reseller. Summit Companies sought to leverage this automation companywide.

They turned to the reseller once again for help implementing an automated AP workflow solution that could increase efficiency across the organization, lower cost, and provide greater process control.

THE SITUATION

Following two decades of unprecedented growth, including numerous acquisitions. Summit Companies could no longer operate on the paper-based system that had become difficult to manage even prior to their expansion.

Invoice workflow faster
with greater accuracy



20,000 invoices
processed per month



Expenses reduced



“Before Compass, we spent so much time dealing with emergency situations that we couldn’t focus on anything else. This solution is perfect for us.”

- Kathy Norell, AP Manager

With its legacy system, Summit’s AP invoices were coming in through all channels – email, regular mail, hand delivery to branch locations, and more. Email was the primary method to route emails for approval and return to AP for processing into Sage 300 CRE. Management faced tremendous pressure to update all systems in order to handle the unprecedented growth, as many employees were hit hard with unnecessary manual labor and service interruptions. This included employees in:

- **Accounting** - which experienced numerous service interruptions and credit holds.
- **Branches** - which experienced service interruptions of phones, utilities, and key suppliers.
- **Corporate** - which saw profitability decline due to credit holds.

Summit sought the help of an in-house AP manager to help bring in the tools they would need to automate their AP process. Having completed 20 AP projects for large oil and gas companies and other industries, Kathy Norell was an ideal choice.

At the same time, Summit’s newly acquired Fire & Life Safety Company (FLSA) was in the process of completing a Compass AP automation implementation. Suddenly, Summit had the tools and experienced personnel to use as a blueprint for the larger organization.

“We sought an AP solution that would take the load off our AP team by automating email folder management, invoice OCR and validation, and QC rather than simply implementing a standard OCR solution,” explains Kathy. Summit specifically needed:

- **Configurable routing** - making sure invoices got to the right person for coding and approval, instead of relying on the AP team for data entry into Sage.
- **Visibility** - creating dashboards help Summit monitor invoices approaching due date, discount dates, and know what is outstanding at any given time.
- **Sage Integration** - our ability to integrate to Sage CRE was critical for them.

This solution transforms their processes in numerous ways, including:

- **Process Control & Standardization** - to meet growth goals.
- **Visibility** - to know where invoices were in process, where bottlenecks are and avoiding problems before they occur.
- **Distributed Access** - with offices across the country, they need to provide reliable access to invoices with centralized accounting functions.

“Our Compass has been an amazing tool for us. This is my 21st AP automation project in my career and they are the best company I’ve ever worked with!”

- Kathy Norell, AP Manager for Summit Companies

- **Outsourcing AP Data Entry** – to focus accounting efforts on reporting instead of data entry, help them attract and retain hard-to-find accounting talent.

Initial deployment was rolled out using a tight 8-week timeline, requiring a few sacrifices in functionality that will be addressed in future software upgrades as part of the following multi-phased approach:

- **Phase 1** - Develop SOPs to manage routing and exception handling.
- **Phase 2** - Implement standardized approval hierarchy and improved processes to alleviate the burden on AP.
- **Phase 3** - API integration for Sage 300CR, including a dedicated training team for user training and functionality enhancements.

“With Phase 1 complete and Phase 2 underway, we can confirm that our Compass has been an amazing tool for us. This is my 21st AP automation project and they are the best company I’ve ever worked with,” boasts Kathy.

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